

Annual Statistical Report on Ultra- Orthodox (Haredi) Society in Israel 2021



Lee Cahner | Gilad Malach

Executive Summary



Ultra-
Orthodox
in Israel
Series

Introduction

Today, there is widespread consensus that the integration of the rapidly-growing ultra-Orthodox (Haredi) community into Israeli society and its economy is now an existential challenge for the State of Israel. In practical terms, this means-increasing employment rates and ensuring economic self-sufficiency; reforming the ultra-Orthodox educational system so that it equips its graduates with the essential tools for employment in a knowledge economy; and bolstering the community's commitment to democratic values, in order to create a common civic denominator with other Israeli citizens. With regard to the latter, the flagrant violation of government lockdown regulations during the pandemic, brought to light the fact that for the community, authority rests exclusively with the rabbis, and not with the government.

At the same time, the ultra-Orthodox community is rapidly evolving. While some groups remain militant in their strict adherence to Jewish law and their commitment to insulation from the Israeli mainstream, others are growing more moderate and moving towards integration in key arenas-the workforce, the integration of "secular" subjects in Haredi schools, the use of technology and the internet, and more.

The report is the product of IDI's Ultra-Orthodox in Israel Program, which has established itself as the preeminent center of knowledge and expertise on the community, and particularly in shaping policy towards integrating the ultra-Orthodox minority into Israeli society and its economy. The annual statistical reports have become the go-to address for policymakers, scholars, and journalists, and receive extensive coverage in the Israeli media.

The Annual Statistical Report on Ultra-Orthodox Society in Israel: 2021 provides a broad vista of the ultra-Orthodox sector today — a community that in 2021 accounted for 13% of all Israelis and is rapidly growing.

The first five volumes in this series (published in 2016–2020) made a significant impact on the study of ultra-Orthodox society in Israel. For the first time, a wealth of data on the community's demography, residential patterns, employment, economic situation and behavior, education, and more, were presented in one

comprehensive volume, providing both a detailed picture of myriad aspects of Haredi life, along with an analysis of trends over time.

Like its predecessors, the sixth Annual Statistical Report presents a comprehensive and up-to-date picture of ultra-Orthodox society in Israel in 2021, including the trends and processes taking place within the community. The current report includes data on the use of the internet and a review of the impact of technology on various aspects of Haredi life.

We hope that as in the past, we have succeeded in bringing to light the current situation of the Haredi community in major life arenas, along with projections as to future trends. These will have a significant impact on Israel's economy and the solidarity and resilience of Israeli society.

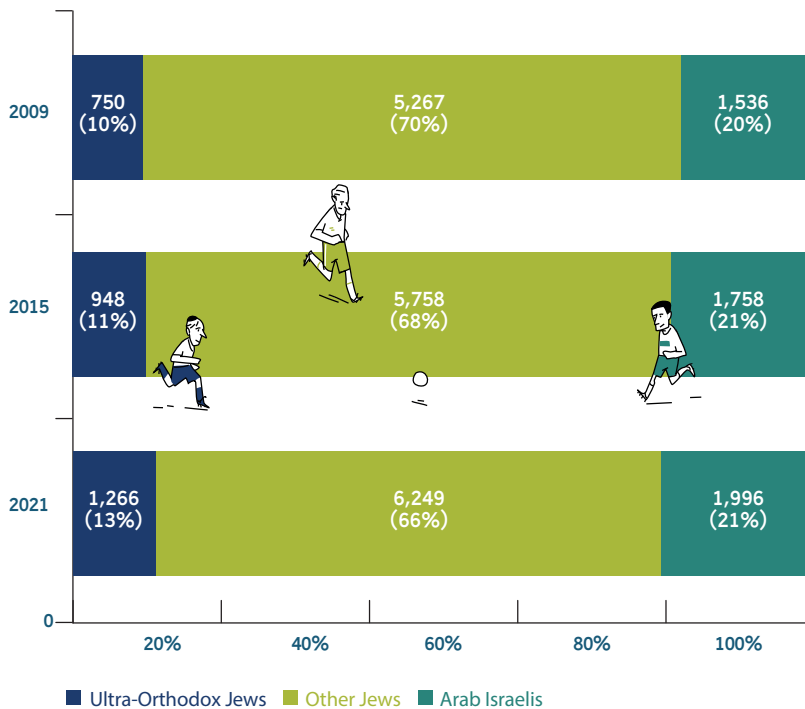
Lee Cahaner and Gilad Malach

The Ultra-Orthodox Population

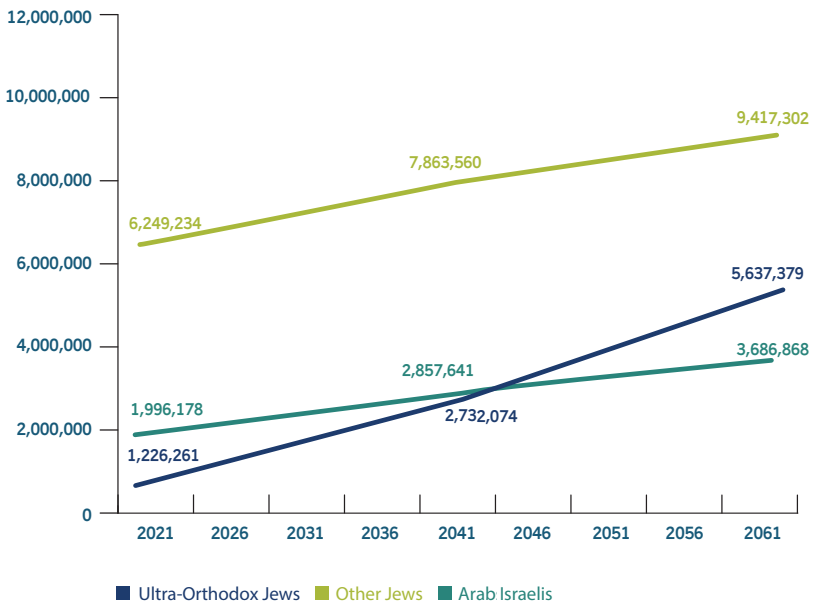
In 2021, the ultra-Orthodox population stood at approximately 1,226,000, compared with some 750,000 in 2009, and currently constitutes 12.9% of the total population. According to Central Bureau of Statistics forecasts, its relative size will increase to 16% in 2030, and it will number two million people by 2033.

The annual growth rate of Israel's ultra-Orthodox population — 4% — is higher than any other population group in developed countries. Underlying this unique rate of growth are high fertility rates, modern standards of living and medical care, and a young age at first marriage. Israel's ultra-Orthodox population is very young, with almost 60% of its members under the age of 20, compared with 31% among the general population.

Population of Israel



Population Forecasts



There has been a slight decline in ultra-Orthodox fertility rates over the last decade and a half, from 7.5 live births per woman between 2003 and 2005, to 6.9 between 2017 and 2019. Among other Jewish women, the average fertility rate is 4.3 for religious women, 3.0 for traditional-religious women, 2.4 for traditional non-religious women, and 2.1 for secular women.

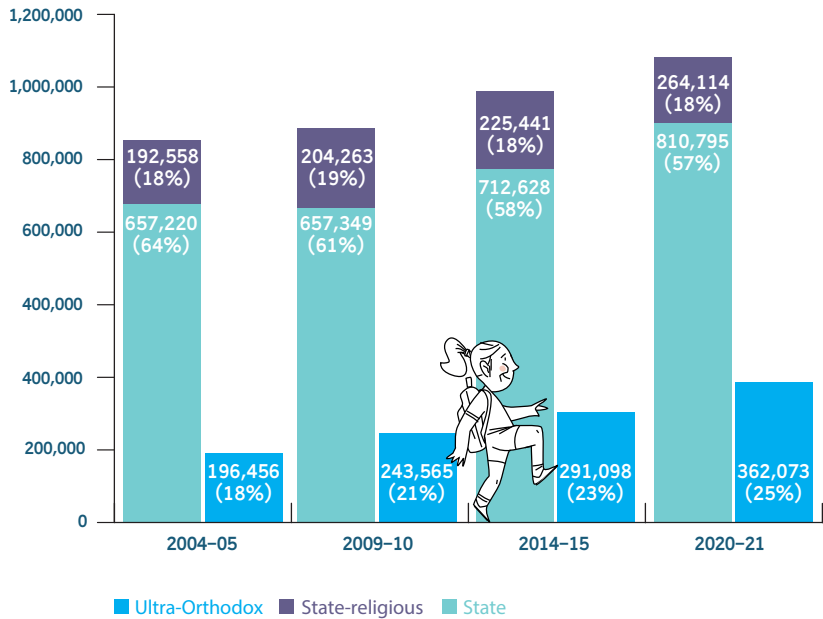
The two “capital cities” of the ultra-Orthodox community in Israel are Jerusalem and Bnei Brak, which (as of 2019) are home to 43.2% of ultra-Orthodox Israelis (26.4% in Jerusalem and 16.8% in Bnei Brak). Alongside these centers, are ultra-Orthodox “suburban cities,” including Beit Shemesh, Modi’in Illit, Beitar Illit, and Elad, in which a total of 23.6% of the ultra-Orthodox population reside. Additional concentrations of ultra-Orthodox residents can be found in large and well-established cities, such as Ashdod, Petah Tikva, Haifa, Rehovot, and Netanya, in which a total of 12.6% of the ultra-Orthodox population reside. These three types of residential settings, together encompassing 11 cities, are home to 79.4% of Israel’s ultra-Orthodox population.

Education

Ultra-Orthodox education constitutes a sizable proportion of the Jewish-or as in its official name — the Hebrew-language education system — in Israel (25%), and of the Israeli education system as a whole (19%). Since the early 2000s, there has been a rapid increase in the number of students in the ultra-Orthodox system, though the annual growth rate has slowed down over the past five years (to 3.7% per year), while the annual growth rate in the State and State-Religious education streams has risen (to 2.3%).

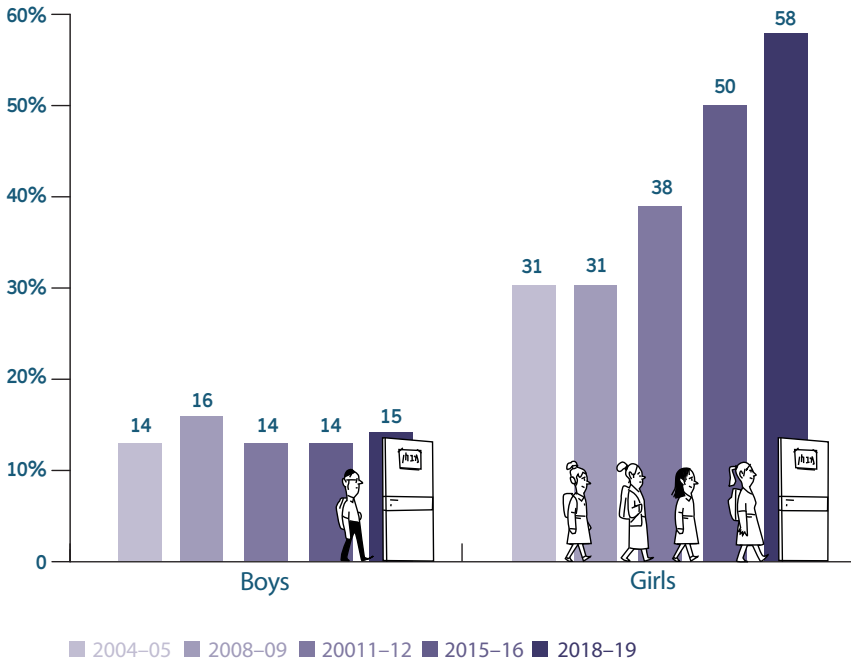
Over the last decade, ultra-Orthodox education has undergone several systemic and structural changes, including the establishment of the Haredi Department within the Ministry of Education and the development of the State-Haredi education stream. In the 2020–21 school year, there were approximately 362,000 students in ultra-Orthodox education frameworks (including elementary and secondary education). The large majority of these (75%) belong to the Ministry of Education’s “unofficial but recognized” category; almost one-quarter (23%) are in the “exempt” category (exempted from all Ministry standards and requirements); and 2% belong to the State-Haredi stream.

Students in the Jewish education system



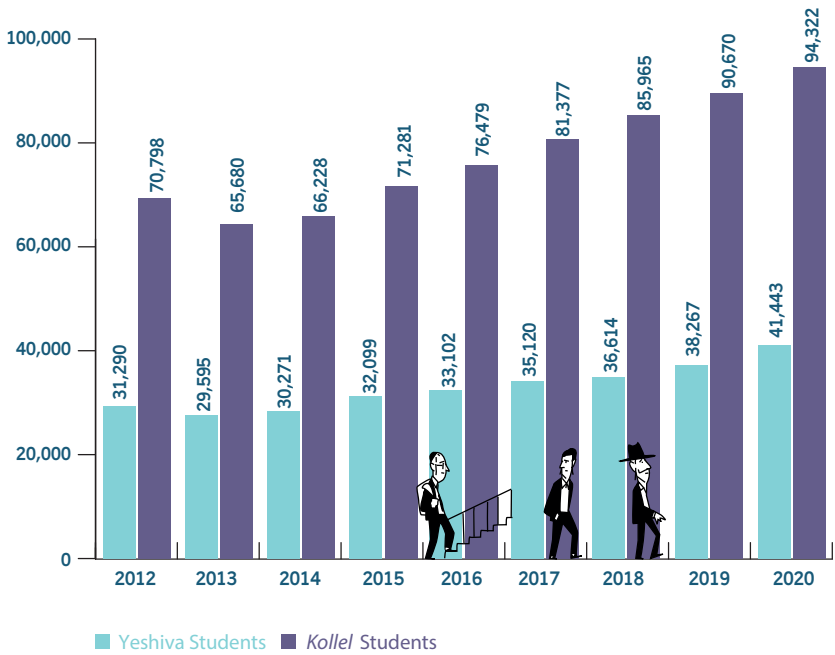
In the 2018–19 school year, 58% of Haredi girls in the relevant age groups took at least one matriculation (Bagrut) exam, compared with just 31% a decade earlier, in 2008–09. On the other hand, the same period saw a slight drop in the percentage of boys taking these exams, from 16% to 15%. The overall percentage of students (boys and girls) attaining a matriculation certificate in the Haredi stream in 2018–19 was just 14%, compared with 81% of students in the State and State-Religious education streams.

Haredi students taking at least one matriculation exam



The post-secondary education system for ultra-Orthodox men comprises four main tracks: Yeshivas (institutions for advanced Torah studies); *Kollels* (institutions for advanced Torah studies for married men); academic studies; and vocational training. For women, the options are studies in a seminar (post-secondary education institutions that also provide vocational training), or academic studies. Between 2014 and 2020, there was a 43% increase in the number of ultra-Orthodox yeshiva and *kollel* students in Israel, reaching 146,150 in 2020. This increase seems to have resulted from increased state support for these studies, as well as stagnation in what was previously a trend towards growing numbers of ultra-Orthodox men entering the workforce.

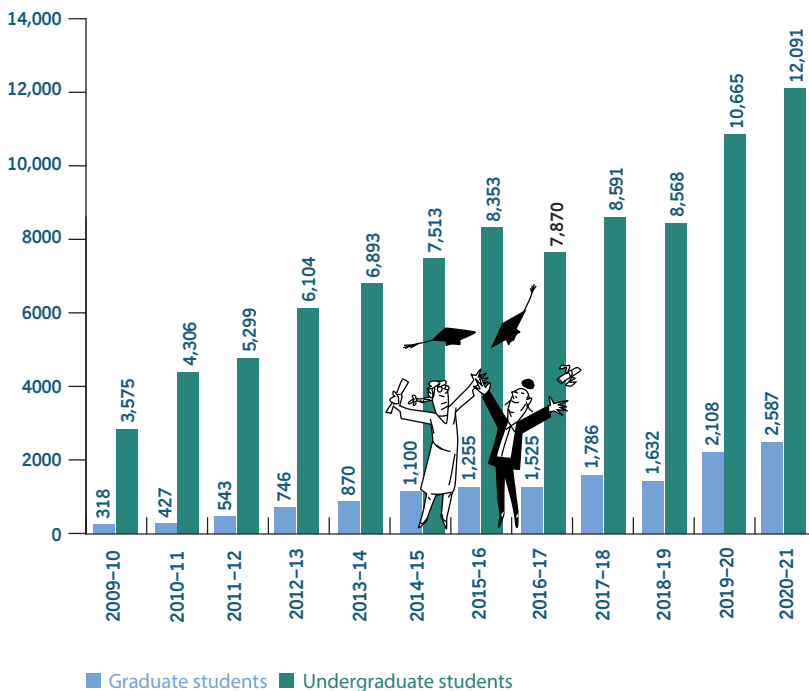
Yeshiva and *kollel* students



Between 2010 and 2020, the number of ultra-Orthodox Israelis (men and women) studying for an academic degree, tripled. The rate of growth in the number of ultra-Orthodox students in higher education, which slowed down between 2016 and 2018, has since accelerated, especially during the 2020-21 academic year (marked by the COVID-19 pandemic), when their numbers reached around 14,700.

The subjects of study preferred by ultra-Orthodox students are largely those that facilitate employment within the ultra-Orthodox community (such as education and teaching, paramedical professions, business administration, and law) or which enable entry into a profession in demand. Ultra-Orthodox students mainly opt to attend colleges, where the entrance requirements are relatively low. Only 11% study in universities (not including the Open University), compared with 31% of other Jewish students. The dropout rate among ultra-Orthodox students between the first and second years of study has declined in recent years, and is now similar to that among other Jewish students. The number of ultra-Orthodox students in technological vocational training programs (run by the Government Institute for Technology and Science Training) stood at 4,900 in 2020–21.

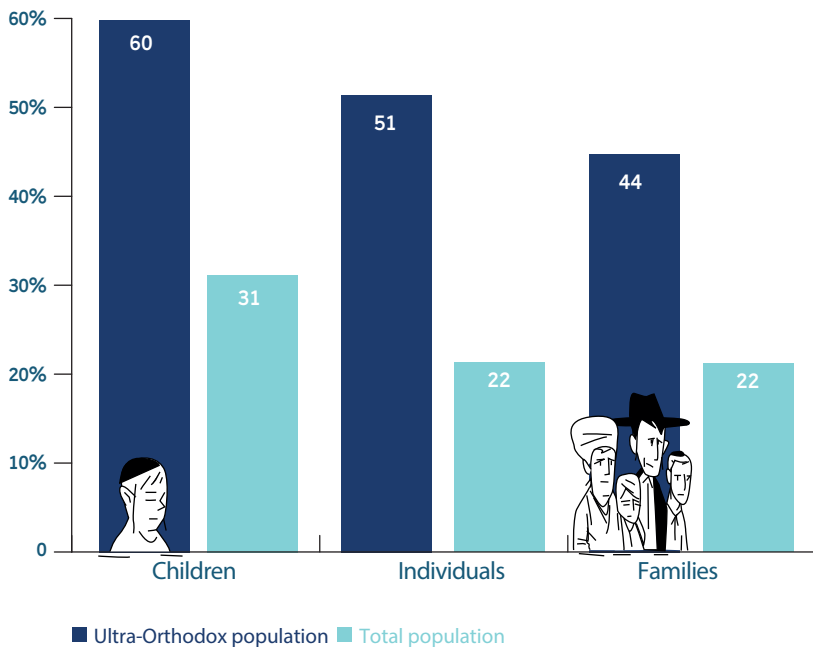
Ultra-Orthodox students in higher education



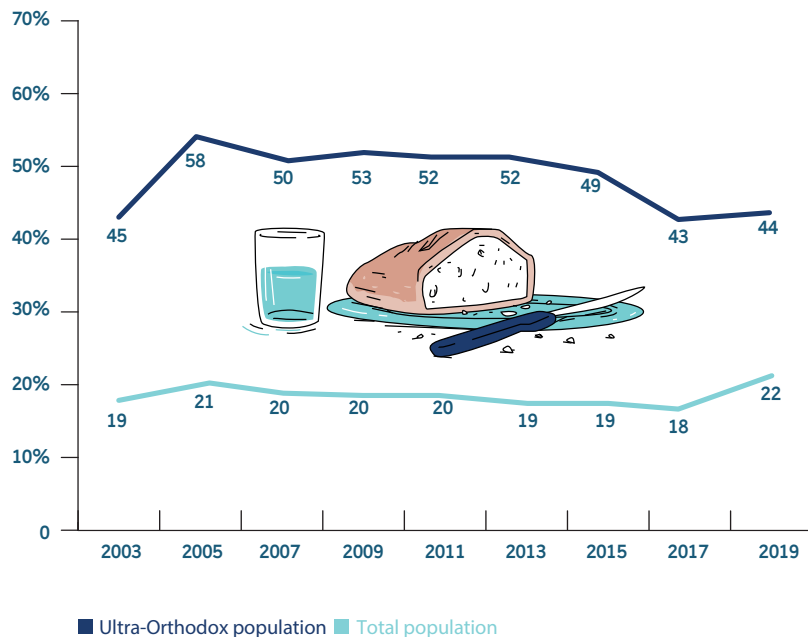
Poverty Rate and Standard of Living

Poverty rates are much higher among the ultra-Orthodox than among the rest of Israel's population. While since 2015, there has been a notable decline in the percentage of ultra-Orthodox families living under the poverty line, the poverty rate remains high, standing at 44% in 2019, compared with 22% in the Israeli population as a whole.

Poverty rates for families, individuals, and children



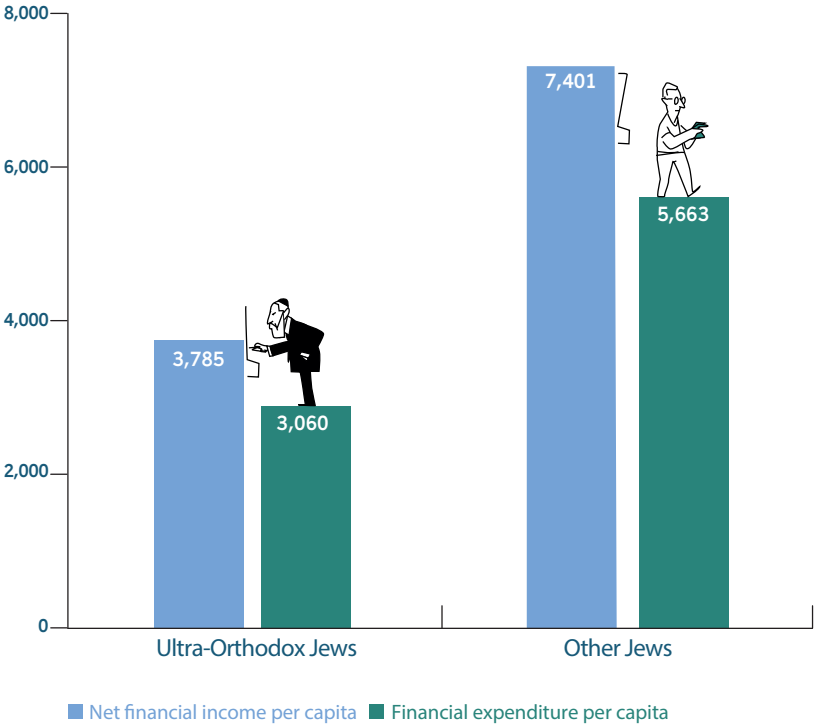
Poverty rates for families



In 2018, the average gross monthly income for an ultra-Orthodox household stood at NIS 14,745, far lower than that of other Jewish households (NIS 23,235). The factors behind this gap include the predominance of households with a single wage-earner, fewer weekly work hours, employment in lower-income occupations, and lower levels of capital and pension funds.

A comparison of monthly household expenses reveals that ultra-Orthodox households spent an average of NIS 14,651 per month in 2018, 16% less than other Jewish households, despite the fact that the average ultra-Orthodox household has almost twice as many family members. This difference in expenditures can be attributed to the community's consumer culture which values thrift, and to special community-based frameworks in the ultra-Orthodox sector, which offer products at reduced prices, and sometimes even at no cost.

Income and expenses per capita (NIS)

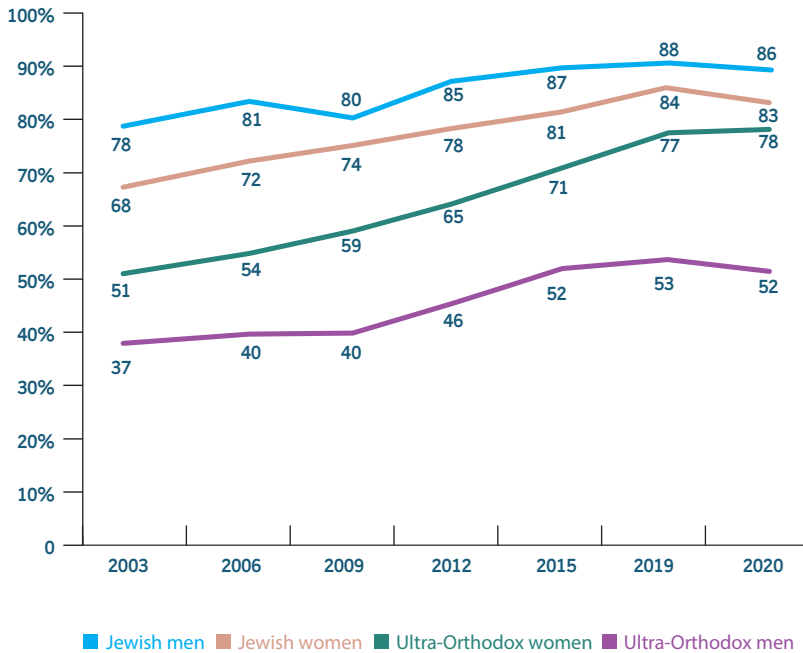


A comparison of patterns of consumption and consumer behavior between the ultra-Orthodox and the rest of the Jewish population reveals that differences remain significant, though they have narrowed somewhat in recent years. The only area in which the two groups are entirely similar is home ownership.

Employment

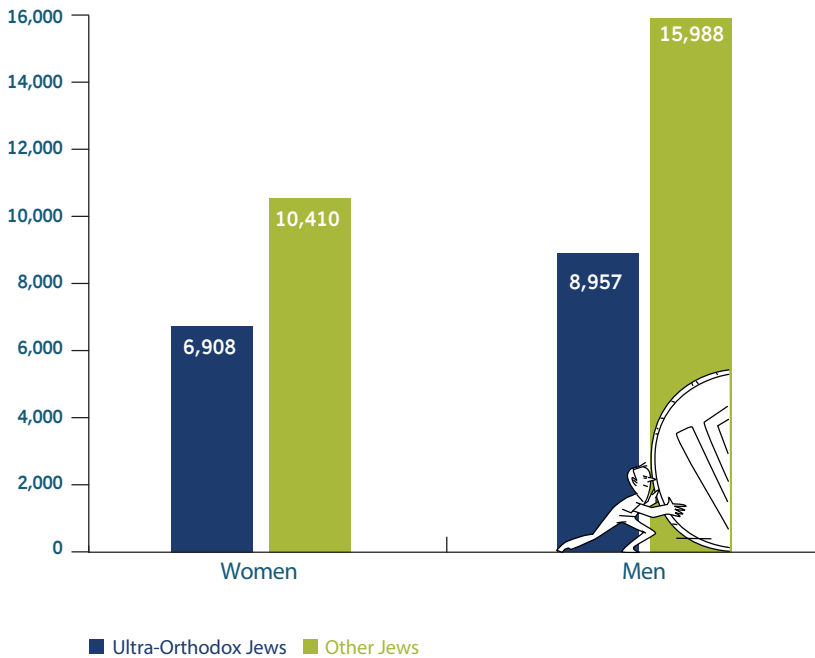
One of the central topics of public debate regarding the place of the ultra-Orthodox community in Israeli society, is the issue of employment, and particularly-the low rate of employment among ultra-Orthodox men. The largest discrepancy between the ultra-Orthodox population and the rest of the Jewish population in this regard was found in 2002, when only around one-third of ultra-Orthodox men, and only just over half of ultra-Orthodox women were employed. Between 2003 and 2015, employment rates in the ultra-Orthodox population rose significantly among both men and women, due to a combination of changing needs in the community, along with public policy that supported the entry of ultra-Orthodox Israelis into the labor market (reduction of government subsidies). As a result, more than half of ultra-Orthodox men (52%) and more than three-quarters of women (78%) are currently employed. However, it should be noted that the employment rate for ultra-Orthodox men has remained largely static since 2015.

Employment rates for adults ages 25-64



The work situation of the ultra-Orthodox population cannot be described solely on the basis of employment rates. Another key component is income. The average income of ultra-Orthodox workers is 59% of that of other Jewish workers. Among other factors, this difference can be attributed to the fewer weekly hours worked by ultra-Orthodox workers and lower compensation, which is also a result of these workers' concentration in lower-paying occupations.

Average gross monthly income for adults ages 25-64



The findings of the 2021 Statistical Report indicate that the distribution of occupations in which ultra-Orthodox women are employed is becoming more similar to that among other Jewish women, as revealed in a decline in the percentage of ultra-Orthodox women working in the field of education and a rise in the percentage working in hi-tech. Continuation of this trend is likely to have an impact in the long term on per-capita income, and consequently on the standard of living of ultra-Orthodox households. At the same time, no similar trend is evident among ultra-Orthodox men.

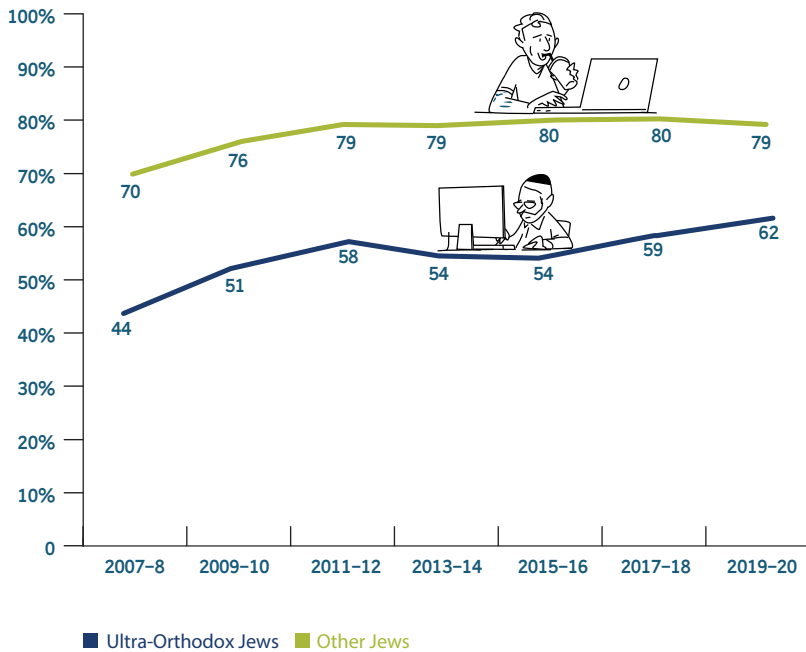
Lifestyles

Ultra-Orthodox lifestyles in Israel are in a state of constant flux and reflect the evolving relationship between the ultra-Orthodox community and Israeli society. One of the near-sacred components of the Israeli ethos and which is core to Israelis' identity, is military service. The fact that so few Haredim serve in the IDF has created a huge gulf between the community and mainstream Israeli society and is a major source of the Israeli public's resentment of the ultra-Orthodox. The situation is not improving; on the contrary, in recent years we are seeing a decline in the numbers in military and national civilian service: Only 1,222 ultra-Orthodox men entered military service in 2019, and just 495 entered national civilian service in 2020,

However, in other areas, the gaps between ultra-Orthodox and other Jewish Israelis are narrowing: In the use a computer (62% among ultra-Orthodox Israelis, compared with 79% among other Jews) and of the internet (60% compared with 92%, respectively). In addition, there is an increase in the number of ultra-Orthodox who have access to a car and the number holding driving licenses. These changes can be viewed as an indication that the trend towards social and economic integration into the Israeli mainstream is growing stronger. One of the main factors driving this trend is the increasing numbers of ultra-Orthodox men and women in colleges and universities and in the workforce. These developments translate into more available income, a growing orientation towards leisure and consumer culture, and the development of a new and growing ultra-Orthodox middle class.

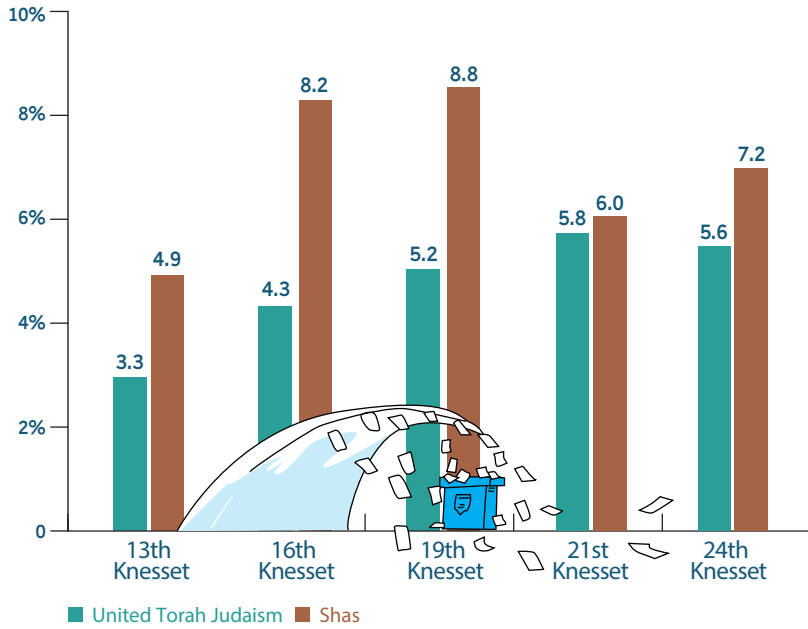
It is interesting to note that volunteering and charitable giving are far more prevalent among the ultra-Orthodox: 40% of the ultra-Orthodox volunteer, compared with 25% of other Jews, and 86% of ultra-Orthodox Israelis aged 20+ made a significant charitable donation between 2019-2020 compared with 57% of other Jews.

Computer use among adults aged 20+



The 2021 Statistical Report also analyzes patterns of voting for ultra-Orthodox parties in elections for the Knesset- United Torah Judaism and Shas, with these patterns serving as an indicator of their political power, the geographical distribution of their supporters, and the internal voting patterns of the population residing in locales with heavy concentrations of Haredim. Voting figures for United Torah Judaism and Shas (as a percentage of all votes cast) rose from 8.2% in 1992, to 12.8% in 2020. In addition, the geographical distribution of these voters has changed, as seen in the rising prominence of the "suburban ultra-Orthodox cities" and the relative decline in the percentage living in Jerusalem and Bnei Brak.

Voting for United Torah Judaism and Shas parties in elections



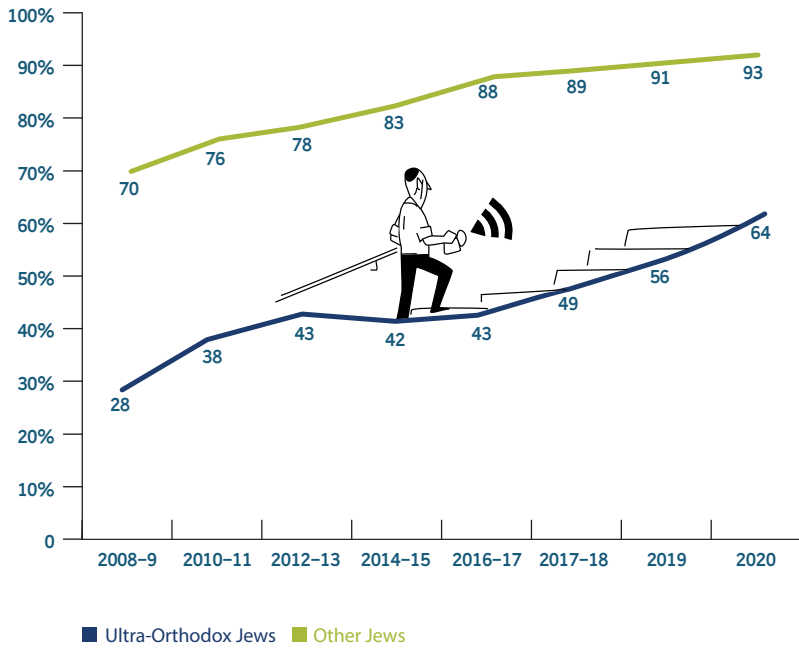
The Internet and the Digital World

The COVID-19 pandemic which reached Israel in March 2020, highlighted the advantages of the community-oriented nature of ultra-Orthodox society, but also underlined the need for linking up to the digital world. Internet access, regarded by some Haredim as a luxury, and by others — as a social taboo, became an existential need — in the context of employment, education, communication with family members, and Torah study (remote learning). Following is an analysis of patterns of use of the internet and technology in the ultra-Orthodox population, compared with the rest of Jewish society in Israel.

Internet Use

Internet use among the ultra-Orthodox reached almost two-thirds (64%) in 2020, compared with just 28% in 2008, but still remains low in comparison to other Jews in Israel (93%). There is also a difference in how the internet is accessed, in that ultra-Orthodox Israelis tend mainly to use a home computer (42%) rather than a cellphone (30%) for going online, as compared with 26% and 72% respectively, among other Jews.

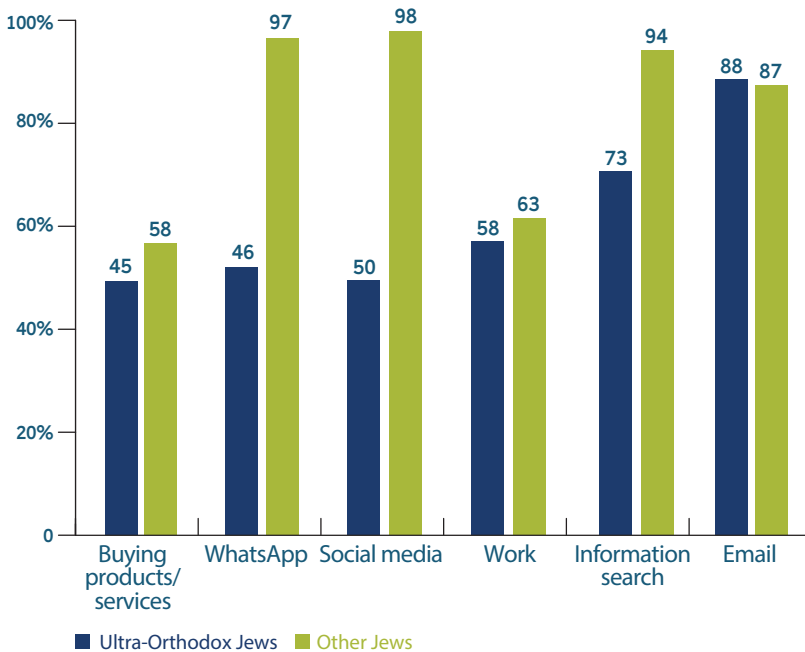
Internet use among adults aged 20+



Internet Usage Patterns

Use of the internet by the ultra-Orthodox tends to be more for functional purposes than for social purposes. The internet is primarily used for email (88%), followed by information searches (73%), digital banking (62%), work-related needs (58%), and accessing government or public services (56%). These rates are slightly lower than parallel rates among other Jews. While internet use for social purposes is less common among ultra-Orthodox users, no less than half of all ultra-Orthodox internet users are on social media. Just under half (46%) use WhatsApp, but only 10% use the internet for gaming.

Main internet uses by population group



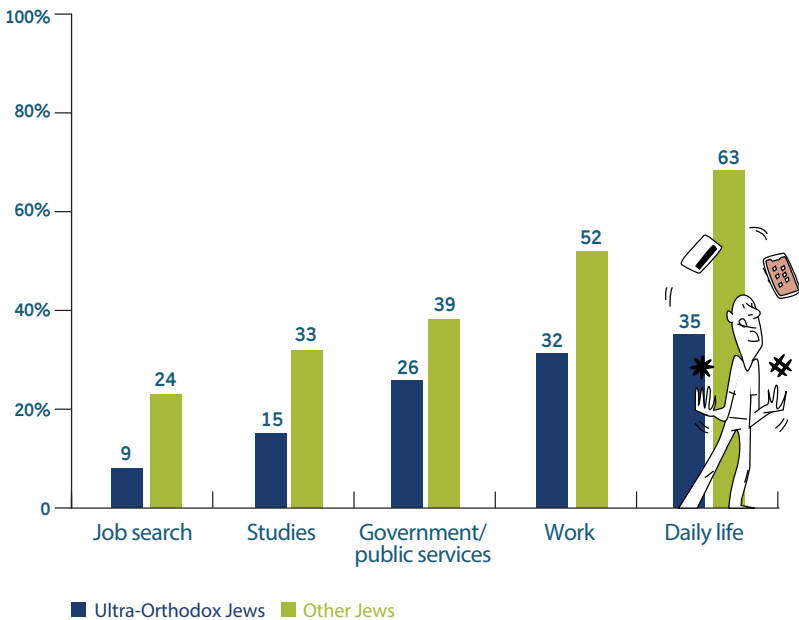
Digital Skills

In the information age, digital literacy is considered an essential skill, impacting individuals' prospects in the labor market. More than half (60%) of the ultra-Orthodox view digital skills as key basic skills, a much lower share than found among other Jews (92%). This difference may be attributable in part to the fact that fewer ultra-Orthodox Israelis report needing digital skills in their daily lives: Only 37% require such skills for work, compared with 57% of other Jews.

Use of Digital Technology

Only around one-third (35%) of ultra-Orthodox internet users report that they are skilled in the use of new online digital technologies in their daily lives, compared with some two-thirds (63%) of other Jews. However, the proportion of those who report that they encounter difficulties in acquiring new digital skills is low, and identical in both population groups (28%).

Skilled in use of new online digital technologies in various fields



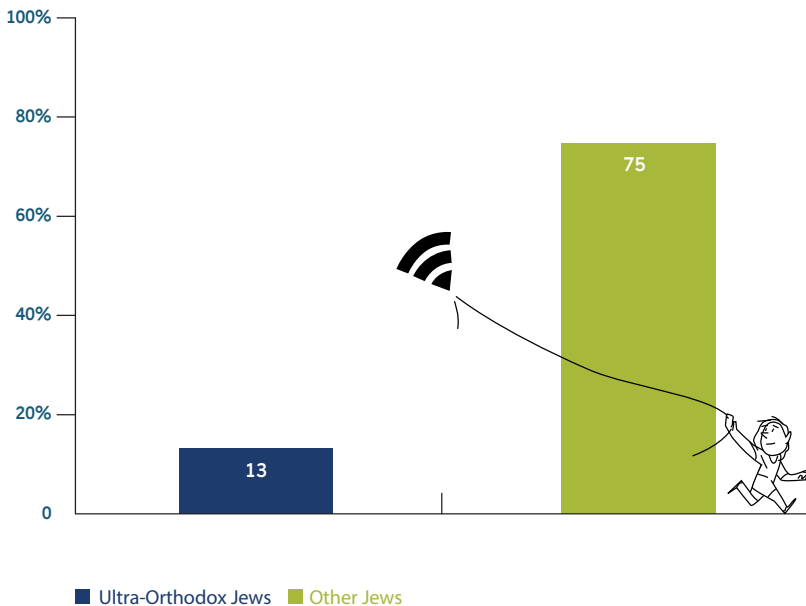
Online Safety

Ultra-Orthodox internet users are less likely to report having had a negative experience in their use of the internet: 14% were victims of internet crime, and 23% were exposed to harmful content (compared with 24% and 37%, respectively, among other Jewish internet users). Possible explanations for these differences include the relatively limited use of social media and the low number of younger internet users among the ultra-Orthodox.

Internet Use Among Children and Youth

Only 13% of ultra-Orthodox children and youth use the internet, compared with 75% of their peers among other Jews. Ultra-Orthodox parents restrict their children's internet access more than do other Jewish parents (88% versus 57%, respectively), as well as restricting the amount of time they spend online (76% versus 62%, respectively).

Internet use among children and youth



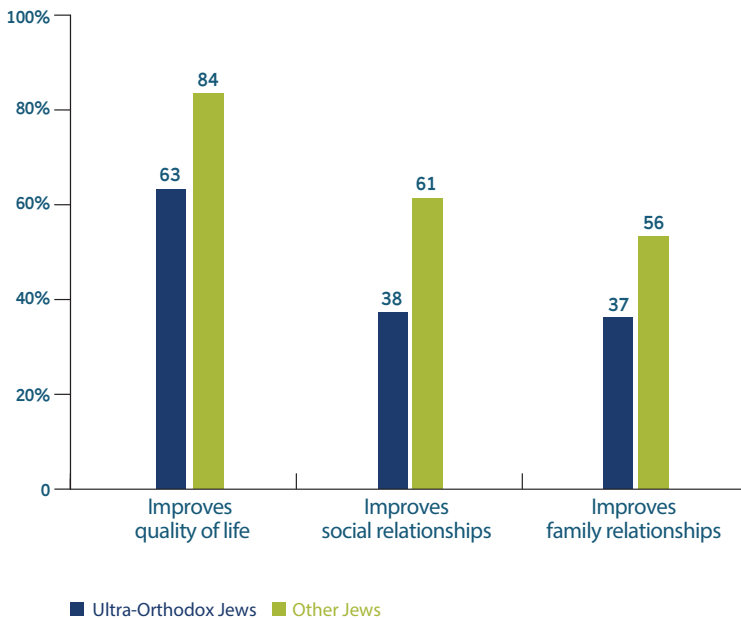
Using Technology to Maintain Relationships

Ultra-Orthodox internet users have fewer virtual social relationships than other Jewish users (12% versus 18%, respectively), are far less likely to renew friendships over the internet (26% versus 51%), and make less use of online shared-interest groups (22% versus 44%). Hardly any register with dating sites (4% versus 19%). Ultra-Orthodox users are also less inclined to believe that technology improves family relationships (27%) and social relationships (28%), than are other Jewish users (54% and 57%, respectively).

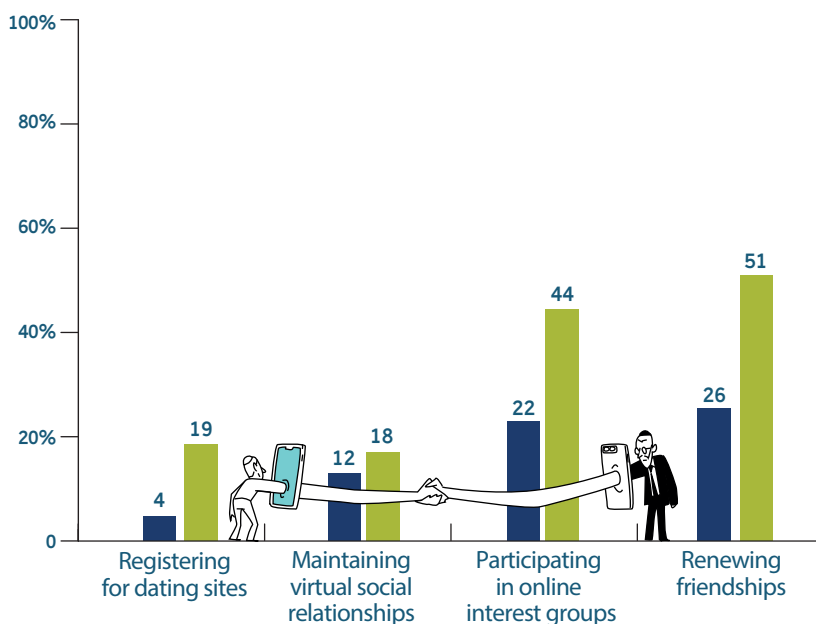
Views on Technology

Around one-half of ultra-Orthodox Israelis (48%) believe that digital technologies improve quality of life, compared with 82% of other Jews, but among internet users this difference is much smaller (63% of ultra-Orthodox users versus 84% of other Jewish users). Similarly, around half of the ultra-Orthodox (49%) believe that digital technologies help reduce social gaps.

Impact of technology on relationships and quality of life



Internet use for social interaction



When it comes to internet use, the ultra-Orthodox community is comprised of what we define as three main groups: The "conservative" group tends to ignore digital innovations and continues to ban internet use; the "pragmatic" group recognizes the need for using the internet and adopts it for the purposes of communication, information, work, and various services, while rejecting its social functions; and the "modern" group adopts most of the innovations that the internet has to offer. Members of this third group utilize various online platforms, including social media, and do not view the internet as a threat to their way of life.

Recent years have seen a considerable shift in ultra-Orthodox society toward greater internet use, and in the coming years we will discover whether this trend will continue to grow, not only in terms of its scope, but also in patterns of use.

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