

The Jewish People Policy Institute (JPPI)

Diane and Guilford Glazer Information and Consulting Center

Israeli Society Index, March 2024

Main Finding

The Jewish People Policy Institute's monthly Israeli Society Index shows that in light of the dispute between the Israeli government and the American administration, the majority of Israeli Jews (who expressed an opinion) believe that Israel should "do what it deems right," even at the cost of disagreement with the United States. A large majority of Israelis believe that President Joe Biden's support for Israel has eroded compared to the beginning of the war.

Additional Findings

- The majority of the Israeli public supports either an immediate attack on Lebanon's border or once the war in Gaza ends
- There has been a significant decrease of almost 20 % in the proportion of Israeli Jews expressing optimism (a lot or some) regarding the country's future
- Over 80% of the Jewish public believes that the policy of granting yeshiva students exemption from IDF service should be "amended," although there is disagreement over whether to do so through persuasion (36%) or coercion (45%)
- 68% of Israeli Jews and 29% of Israeli Arabs support Arab conscription into the IDF or national service; most believe that this should be done "through persuasion"
- 66% of Jews (and less than a fifth of Arabs) believe that the existing exemption for religiously observant women from military or national service should be eliminated
- The majority of Israeli Jews believe that "Jewish settlements in Judea and Samaria create deterrence and contribute to the security of all Israeli citizens" and do not agree that the settlements are a "burden"
- A significant majority of Jews and the largest group among Arabs (38%) agree that "there is no chance of reaching a peace agreement with the Palestinians in the foreseeable future"
- Slightly more than a quarter of Arabs (28%) and nearly a quarter of Jews (23%) agree that "if they had an opportunity to emigrate abroad" they would do so

Israel-US Relations

The harsh criticism President Biden leveled at Prime Minister Netanyahu in a March 10th MSNBC interview underscored the erosion in the last several weeks in public expressions of US support for Israel and the management of the war in Gaza. The March JPPI survey examined Israel-US relations with two questions (the survey was conducted before the MSNBC interview with Biden).

The data shows that Israelis believe that US support for Israel has indeed eroded. Nearly half of Israeli Jews (47%) believe that "President Biden strongly supported Israel at the beginning of the war but supports it less today." A quarter believe that "President Biden strongly supported Israel at the beginning of the war, and still strongly supports it today" (the others believe that Biden no longer supports Israel or never supported it). Overall, 60% of Jewish respondents agree with statements indicating a decline in the American president's support – some from strong support to less strong support, and some from strong support to no support. Thirty-nine percent of Israeli Arabs also agree that American support has decreased, although a larger group (43%) believes that American support for Israel remains very strong.

Of the following options, which is closest to your position?

	President Biden strongly supported Israel at the beginning of the war, and still does today	President Biden strongly supported Israel at the beginning of the war, but supports it less today	President Biden strongly supported Israel at the beginning of the war, but does not support it today	President Biden did not support Israel that much even at the beginning of the war	Don't know
	%	%	%	%	%
Total Jews	25	47	13	12	4
Total Arabs	43	30	9	3	15
Opposition voters	39	50	5	3	2
Coalition voters	11	46	19	18	5

A significant gap in how Israelis assess Biden's position is evident between coalition party voters (excluding those from National Unity) and opposition party voters. About a fifth of coalition supporters believe that Biden did not support Israel even at the beginning of the war, and a similar proportion believes that he supported Israel at the beginning of the war but does not support it now.

At the same time, four out of ten opposition party voters still believe that Biden supports Israel as he did at the beginning of the war (as mentioned, this data is from the week prior to Biden's MSNBC interview in which he intensified his criticism of Israel).

Analyzing the data according to current voting intentions – i.e., not how respondents voted in the last elections, but how they would vote if elections were held today –

reveals that 38% of Likud voters believe that Biden does not currently support Israel. By contrast, only 8% of National Unity voters (the party that currently has the greatest support) believe that Biden does not support Israel. However, among both Likud and National Unity supporters, the same proportion (49%) believe that Biden currently supports Israel but to a lesser extent than in the past. Among supporters of other parties, Religious Zionism and Jewish Power [*Otzma Yehudit*] stand out with a high proportion (about a third) believing that President Biden has not supported Israel – even at the beginning of the war.

The second survey question related Israel-US relations this month was designed to explore the willingness of Israelis to accept American positions or dictates, considering Israel's dependence on American support. Respondents were presented with four options, and as can be seen in the table below, a large majority of Israelis believe that "the US is an important ally," but differ on the degree to which US positions should be taken into account. Forty-two percent of Israeli Jews and 46% of Israeli Arabs agree that "a great effort should be made, including compromising on issues that do not actually endanger Israel's security, in order to maintain the alliance" with the United States. Forty-five percent of Jews (and 16% of Arabs) believe that the US "is an important ally, but this does not mean that we should accept its positions. When we agree – great; when we don't agree – Israel should do what it deems right."

As expected, this question revealed a very significant gap between coalition and opposition voters. About two-thirds of coalition voters (66%) chose the option "Israel should do what it deems right," a corresponding proportion of opposition voters chose the option "including compromises." Only 16% of Likud supporters (according to current voting intentions), chose the "including compromises" option, compared to 56% of Nation Unity supporters and 70% of Yesh Atid supporters.

Of the following options, which is closest to your position?

	The US is an important ally, and we must make a great effort to maintain the alliance with it, including compromises on things that do not actually endanger Israel's security	The US is an important ally, but that does not mean that we have to accept its positions. When we agree –great, when we disagree – Israel should do what it deems right	The US is an ally, but its importance is decreasing, Israel should use it when possible, but not behave as if its existence depends on friendship with the US	The US was an important ally, but in recent years it has caused Israel more harm than good, and we should carefully consider how much the coordination and dialogue with the US really strengthens Israel	Don't know
	%	%	%	%	%
Total Jews	46	16	12	8	18
Total Arabs	42	45	6	4	3

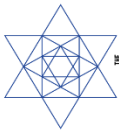
What should Israel do on the northern front?

There is no consensus among the Jewish-Israeli public regarding necessary steps on the northern border. In this month's survey, respondents fell into to one of three groups of similar size: one supports an immediate attack on the Lebanese border, another supports an attack on Lebanon after the war in Gaza ends, and the third supports a diplomatic settlement that would obviate an expansion of the war. This data is similar, but not identical, to data from JPPI's January survey, which was formulated slightly differently. On this question, a significant gap is evident between coalition party voters, the vast majority of whom support an immediate attack (40%) or a later attack (41%) on Lebanon. By contrast, a small majority of opposition party voters (51%) support the pursuit of a diplomatic solution.

Of the following options, what do you think Israel should do on the northern front?	When you think about what is happening on the northern front, which of the following options would you like Israel to pursue?		
	January	March	
Open a second front against Hezbollah as soon as possible (now or immediately after the operations in Gaza)	37%	29%	Attack Hezbollah with full force as soon as possible
Try to reach an agreement, with international support, that will avoid the need for a war against Hezbollah	36%	28%	Strive for a diplomatic settlement in Lebanon without expanding the war
End the war in Gaza, and wait for a future opportunity to attack Hezbollah	18%	34%	Finish operations in Gaza and then attack Hezbollah with full force
Don't know	9%	9%	Don't know

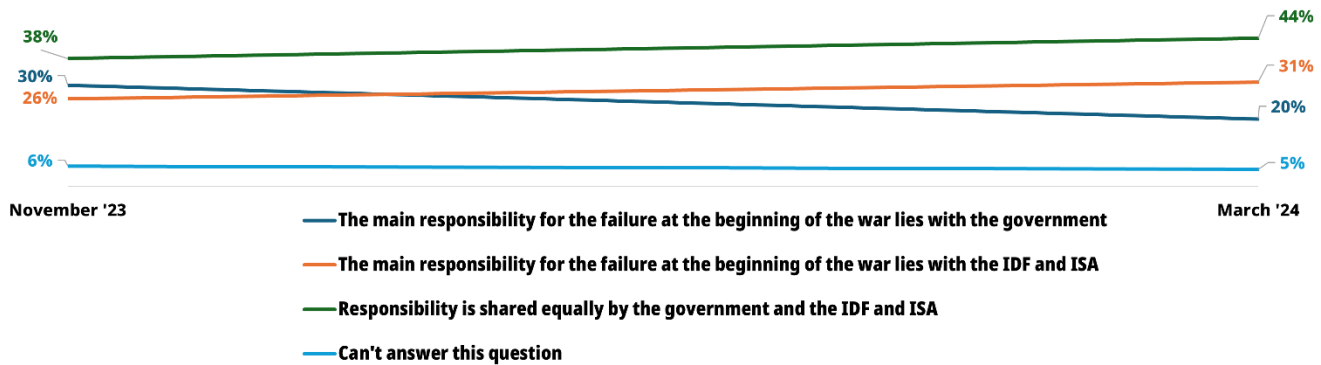
Responsibility for the October Failure

In the months since the beginning of the war, revelations regarding the days and hours preceding the Hamas attack in the south have led to a change in public opinion on the division of responsibility for the "failure" between the political and military echelons. In March, we repeated verbatim a question that also appeared in JPPI's November survey, conducted about a month after the start of the war, and the answers indicate: a decrease in the proportion of Israelis who place sole responsibility on the government; a slight increase in the proportion of Israelis who place primary responsibility on the IDF and the Israel Security Agency (ISA/Shin Bet); and an increase in the proportion of Israelis who place responsibility jointly on the government and the army.



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The main responsibility for the failure at the beginning of the war



As seen in the table below, opposition party voters exhibited the most significant change in attitudes. At the beginning of the war, opposition party voters leaned toward solely blaming the government, and exempting the IDF and the ISA from responsibility for the failure. However, today more of them believe that the responsibility does not rest solely with the government but is shared by the political and security echelons.

Among coalition party voters, who initially tended to attribute responsibility for the failure mainly to the political (executive) echelon, the March survey found an intensification of this tendency. A major gap can be identified in the attribution of responsibility for the failure according to current voting intentions. Among those who said they would vote for Likud if elections were held today, 79% believe that "the primary responsibility for the failure at the start of the war lies with the IDF and the Israel Security Agency." Among those who would vote for the National Unity alliance if elections were held now, 64% chose the option that responsibility is "equally shared between the government, the IDF and the ISA," compared to 26% who believe primary responsibility lies with the government.

Of the following options, which is closest to your position?

	The government is mainly responsible for the failure at the beginning of the war		The IDF and the ISA are mainly responsible for the failure at the beginning of the war		Responsibility is shared equally by the government, the IDF and the ISA		Can't answer this question	
	Nov. '23	Mar. '24	Nov. '23	Mar. '24	Nov. '23	Mar. '24	Nov. '23	Mar. '24
	%	%	%	%	%	%	%	%
Opposition voters	49	33	6	8	42	55	3	4
Coalition voters	7	5	50	59	36	31	7	5

Relations with the Palestinians

The March JPPI survey included several questions regarding relations between Israel and the Palestinians, both in the context of the war and generally. The survey data shows that a large majority of the Jewish public, and a sizable minority of the Arab public agree that "there is no chance of a peace agreement with the Palestinians in the foreseeable future." Seventy-nine percent of Israeli Jews agree with this statement, and 65% "strongly agree." Among Israeli Arabs, 24% "strongly agree" with the statement, and another 15% "somewhat agree" with it – that is, about 40% of Israeli Arabs agree that there is no chance of a peace agreement in the foreseeable future. Among Jews, only 12% disagreed with this statement, and among Arabs, 28% (the rest "neither agree nor disagree" or "don't know").

Is there an alternative to a peace agreement? The survey examined the statement "Ultimately, there is no substitute for a long-term peace settlement with the Palestinians," which did not receive majority agreement among Jews. Forty-three percent of them agreed with this statement, the majority of whom are opposition party voters. Among coalition party voters, only 14% agreed (strongly or somewhat) that there is no substitute for a peace settlement. A large majority (68%) strongly disagreed with the statement.

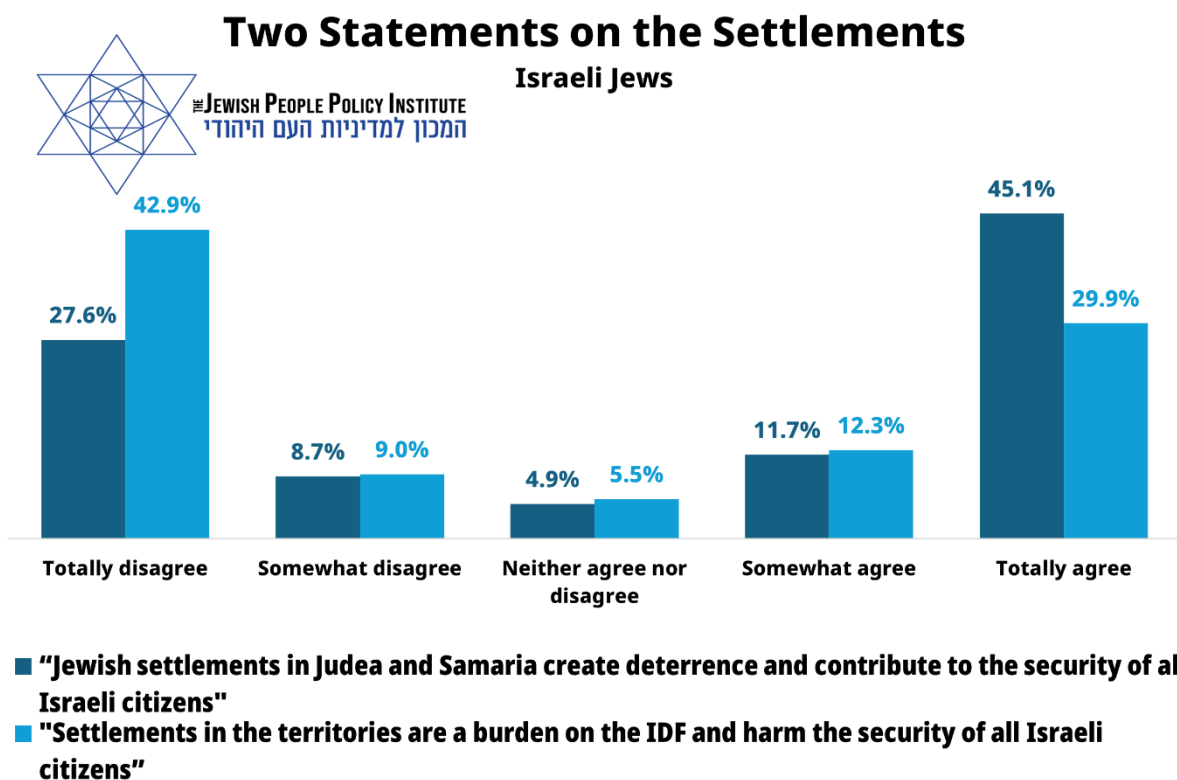
What type of arrangement do Israeli Jews prefer in Judea and Samaria (the West Bank)? The survey presented several options, which can be seen here compared to similar (but not identical) to the options presented in the November survey. According to the March survey, about a third of Israeli Jews believe that Israel should intensify control over the Palestinians and consider dissolving the Palestinian Authority and annexing of the West Bank. Another third believes that maximum separation from the Palestinians should be pursued while maintaining security control over the territory currently in Israeli hands.

We will present three statements that represent different world views. Please indicate which is closest to your position (even if not completely):

	Nov. '23	Mar. '24
Israel needs to strengthen its control over the Palestinians, expand the settlements, consider dissolving the Palestinian Authority and annexing Judea and Samaria	46%	37%
Israel should strive for complete separation from the Palestinians, the dismantling of settlements outside the major blocs, and focus on maintaining the IDF's freedom to act to prevent the growth of terrorist organizations in the territories	31%	39%
Israel should try to reach a peace agreement with moderate Palestinians, and allow the establishment of a Palestinian state that will live in peace alongside the State of Israel	14%	16%
Can't answer this question	9%	7%

As expected, there are significant differences between coalition and opposition supporters. A large majority (76%) of coalition party voters chose the first option (strengthening control and possible annexation), while a majority of opposition voters (54%) chose the second option, and more than a quarter (28%) chose the third option – attempting to reach a peace agreement. Among Religious Zionism voters (according to current voting intention) 96% chose the first option, as did a similar proportion of Jewish Power [*Otzma Yehudit*] supporters (89%). Meretz supporters are, again, the only ones who chose the option of trying to reach a peace agreement.

The survey included two statements about the settlements. One reflecting the view that "settlements are a burden," and the other the view that "settlements are an asset." When juxtaposed, a very similar picture of agreement and opposition to each emerges, but this picture obscures a great deal of disagreement (the data is shown without the negligible percentage of respondents who answered "don't know"). Among coalition voters, 92% agree that the settlements are an asset. Among opposition voters, 72% agree that the settlements are a burden. This is not a precise mirror image: ultimately, a majority of Israeli Jews believe the settlements are an asset (57%), and a majority do not agree that they are a burden (52%). Of course, factoring in the positions of Israeli Arabs strengthens the "burden" camp compared to the "asset" camp. Sixty-six percent of Israeli Arabs do not agree that the settlements are an "asset," and 67% agree that they are a "burden."



Public Trust in Leaders

The five JPPI surveys conducted since the outbreak of the war indicate relative stability in the public's trust in both the military and political leadership. Trust in IDF commanders has decreased slightly since the beginning of the war and remained stable this month. Trust in Prime Minister Netanyahu has been quite low since the start of the war and stands at just over 30%. Only among the supporters of two parties, Likud and Shas, more than half have a very high level of trust in the prime minister; the March survey found no significant change. About a third of Israeli Jews have confidence in the government, and this figure has remained stable. Among Arabs, 16% have high or very high confidence in the government. A third of Arabs have very low confidence in the government (34%).

Level of Trust (ranking by Jews)

	Trust in the Prime Minister		Trust in the Government	
	February	March	February	March
	%	%	%	%
Very high	17	19	7	6
Quite high	16	16	27	29
Quite low	13	14	35	33
Very low	52	50	27	27
Don't know	1	1	4	5

What is your level of trust in IDF commanders?

(ranking by Jews)

	Very high	Quite high	Quite low	Very low	Don't know
	%	%	%	%	%
October	35	40	17	6	2
November	44	42	9	4	1
January	31	45	14	8	2
February	25	45	16	11	2
March	26	49	16	8	1

Public Confidence in Winning the War

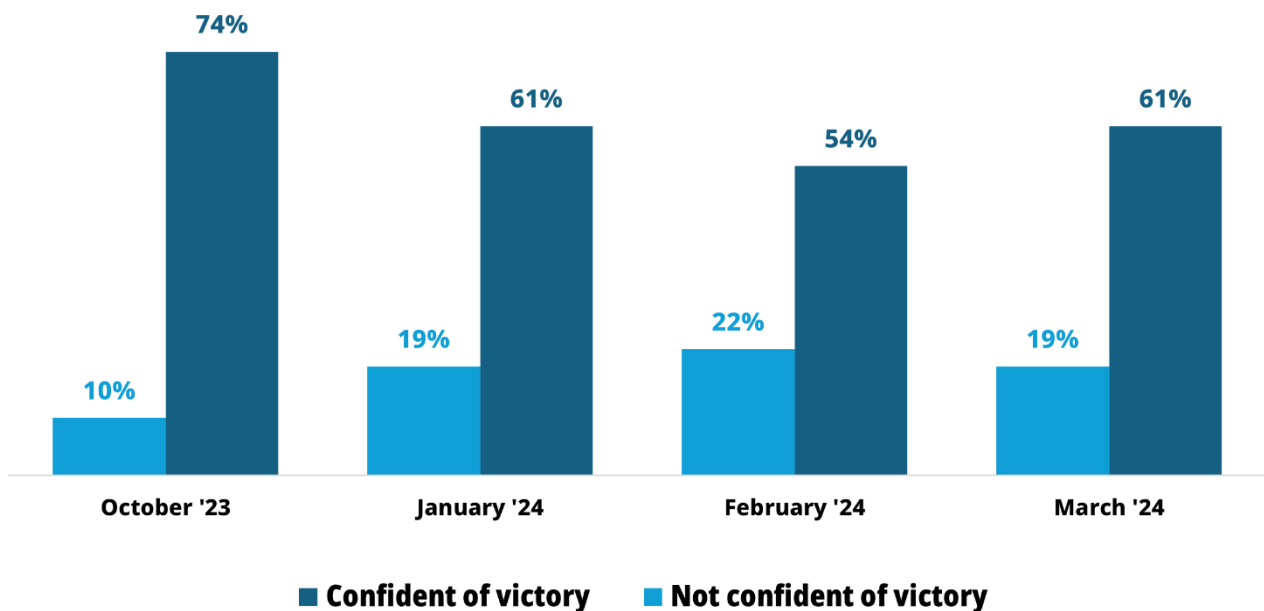
The Israeli public's confidence of victory in the war has not changed significantly this month compared to last month, and after a two-month decline it returned to January 2024 levels. Among Israeli Jews, 61% rated their confidence in a victory as a 4 or 5 on a scale of 1 to 5. Among Israeli Arabs, 29% believe that Israel is on its way to victory. Forty-seven percent of Israeli Arabs rated their confidence in victory with a score of 1 or 2 out of 5, compared to 19% of Israeli Jews.

As in previous months, the March survey found that the level of confidence in winning the war against Hamas is significantly influenced by political camp. If all those who rated their position at a 4 or 5 are taken as one category, 79% of coalition supporters express strong confidence in victory, compared to 50% of opposition supporters. In other words, the increase in confidence in winning compared to last month is evident only among coalition voters. More than half of coalition voters (51%) rated their confidence in victory with the highest score (5) compared to 26% of opposition voters.



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Confidence in Winning the War *Israeli Jews*



The Burden of Military Service

The JPPI monthly surveys have examined three questions concerning IDF enlistment and the burden of service: a question on ultra-Orthodox conscription; a question on Arab conscription; and a question on the conscription of women. Ultra-Orthodox yeshiva students are currently exempt from IDF conscription or other service duty, Arabs are exempt from service obligations, and women who declare they are religiously observant are exempt from service. For each of these groups, we wanted to take the public's temperature by presenting the following options: the existing arrangement is appropriate; the arrangement is inequitable but should be maintained out of respect for the values of the sector in question; the arrangement is inequitable but should be maintained to avoid social unrest; the arrangement should be remedied through persuasion; the arrangement should be remedied through coercion. An additional option was also included: "no position reflects my opinion."

Due to differences between sectors and the various standing arrangements, the question language was slightly different for each sector, but comparison between the responses is instructive. The highest support for compulsory conscription applies to the ultra-Orthodox. The highest level of support for maintaining the status quo applies to religiously observant women. There is (among Jews) fairly high support for changing the customary situation through persuasion.

Today, yeshiva students are exempt from conscription in the IDF or national service. Which statement most closely reflects your opinion?

	This is the optimal situation and should be maintained for the sake of Torah study	This is an inequitable situation, but should be maintained out of respect for the ultra-Orthodox way of life	This is an inequitable situation, but there is no way to change it so we shouldn't engage in unnecessary conflict	This is an inequitable situation that needs to be remedied gradually through persuasion	This is an inequitable situation that needs to be remedied in any possible way, including coercion (or withholding budgets)	No position reflects my opinion
	%	%	%	%	%	%
Total Jews	8	3	6	36	45	2
Secular	0	1	4	26	68	0
Traditional (not so religious)	2	3	12	44	38	1
Traditional (religious)	10	2	0	51	28	9
Religious	10	1	3	60	22	3
Ultra-Orthodox	46	11	12	26	1	4

Among Israeli Arabs, close to a third support changing the current situation regarding either Arab conscription in the IDF or national service. Nearly half of Israeli Arabs believe the ultra-Orthodox should be drafted, but about a quarter have no position on this matter. Fifty-eight percent of Israeli Arabs support maintaining the current

arrangement granting exemptions to religiously observant women, more than double the rate among Jews. In fact, the Arab position on the exemption of religiously observant women is very similar to that of religious Jews, with 56% believing that the exemption should not be lifted.

Today, Israeli Arabs are exempt from conscription in the IDF or national service. Which statement most closely reflects your opinion?

	This is the optimal situation and should be maintained for the sake of maintaining public order	This is an inequitable situation, but should be maintained out of respect for the Arab ideological position	This is an inequitable situation, but there is no way to change it, so we shouldn't court unnecessary conflict	This is an inequitable situation that needs to be remedied gradually through persuasion	This is an inequitable situation that needs to be remedied in any possible way, including coercion (or withholding budgets)	No position reflects my opinion
	%	%	%	%	%	%
Total Jews	11	3	11	40	28	7
Total Arabs	39	17	7	10	19	7

Today, women who state they are religiously observant are exempt from conscription in the IDF or national service. Which statement most closely reflects your opinion?

	This is the optimal situation and should be maintained because it is firmly established	This is an inequitable situation, but it should be maintained out of respect for the religious public	This is an inequitable situation, but there is no way to change it, so we shouldn't court unnecessary conflict	This is an inequitable situation that needs to be remedied gradually through persuasion	This is an inequitable situation that needs to be remedied in any possible way, including coercion (or withholding budgets)	No position reflects my opinion
	%	%	%	%	%	%
Total Jews	18	8	5	33	33	3
Total Arabs	34	24	6	13	4	19
Secular	3	4	3	36	51	2
Traditional (not religious)	10	7	12	43	27	1
Religious	34	18	4	29	10	5

Optimism and Emigration

Between November 2023, about a month after the October 7 massacre and the beginning of the war, and March 2024, there was a significant drop in the level of optimism among Israeli Jews. In November, 74% were "very" or "somewhat" optimistic about Israel's future. This figure dropped to slightly more than half of Israeli Jews (56%). The decline is evident both among coalition voters and opposition voters. The proportion of those responding "very" optimistic roughly halved among opposition supporters, from 29% in November to 17% in March. Among coalition voters (not including National Unity), "very optimistic" respondents dropped from 61% to 53%.

Among Jews, only the religious (Dati) sector included a majority who are very optimistic (59%). Among the secular, a majority are somewhat pessimistic (33%) or very pessimistic (21%). Among Arabs, a majority remains pessimistic (57%).

Twenty-seven percent of Israeli Arabs agreed with the statement "If I had a practical possibility to emigrate abroad, I would do so." Among Jews, 23% agreed with this statement. The proportion among secular Jews was a third (34%), among religious (Dati) Jews the percentage was negligible (3%), and among the ultra-Orthodox it was 13%. It should be noted that the question was examined before Chief Rabbi Yosef's warning that yeshiva students and their families would leave Israel if they were required to enlist in the IDF. Unsurprisingly, there is a correlation between pessimism and emigration, although the proportion of pessimists regarding the country's future is still much higher than the rate of those expressing a desire to emigrate.

In general, are you optimistic or pessimistic regarding the future of the State of Israel?		
	November '23	March '24
Very optimistic	43%	31%
Somewhat optimistic	31%	25%
Somewhat pessimistic	15%	26%
Very pessimistic	8%	16%
Don't know	2%	2%

*

Data were gathered for the Jewish People Policy Institute survey by theMadad.com (600 Jewish respondents via an online poll) and by Afkar Research (200 Arab respondents, half online and half by phone). The data was analyzed and weighted by Professor Camil Fuchs to represent the adult Israeli population, with the assistance of JPPI fellow, Noah Slepko. The report was written by JPPI senior fellow, Shmuel Rosner, who heads the JPPI Israeli Society Index.