

JPPI Israeli Society Index

Special Survey of Ultra-Orthodox (Haredi) Society

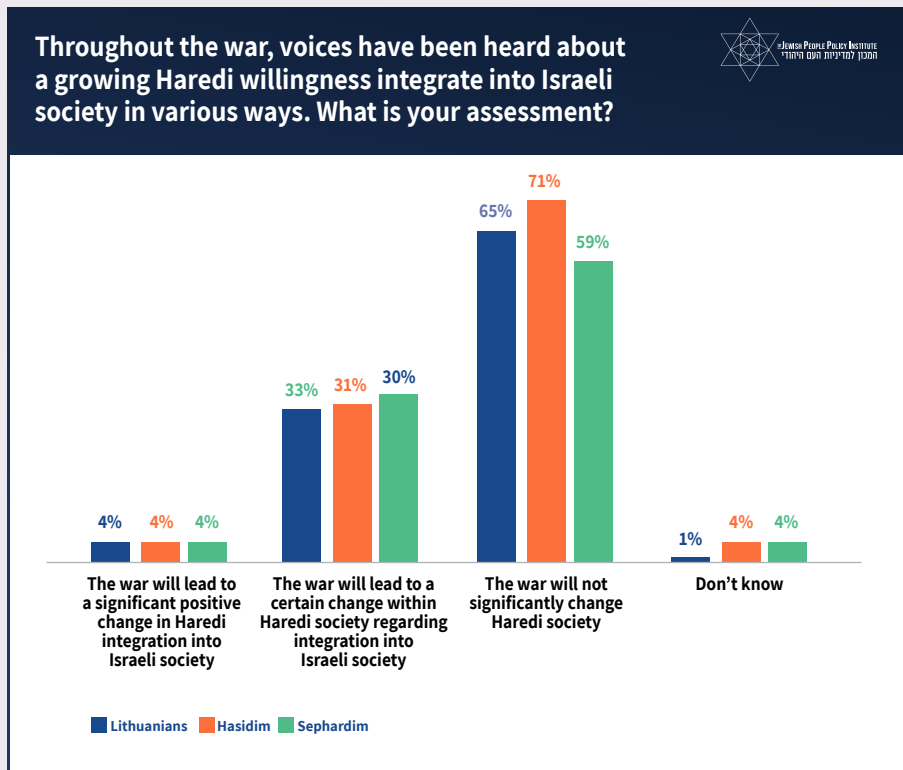
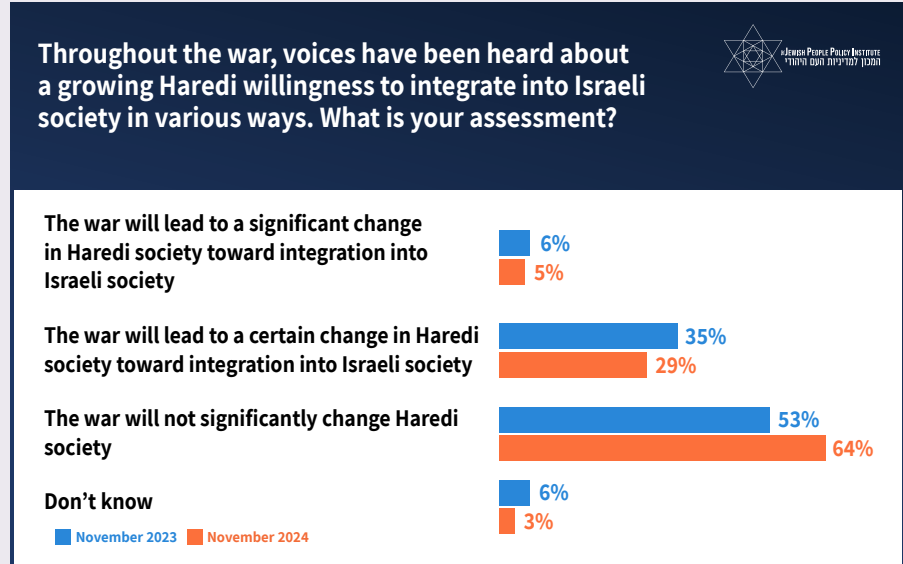
The Jewish People Policy Institute's December Israeli Society Index focuses on the views of Israel's ultra-Orthodox (Haredi) community. In the midst of the military draft crisis and the war: 93% of ultra-Orthodox oppose the conscription of young Haredi men as expected of young people across all other Jewish Israeli population groups. This report has four main parts: ultra-Orthodox conscription, trust in Israel's leadership/confidence of victory, economy and policy, and social cohesion.

» Findings

- A large majority (79%) of the ultra-Orthodox oppose full conscription even if those eligible were to serve in units adapted to their distinctive way of life.
- A majority of Haredi Israelis also oppose the possibility of IDF induction by serving in Haredi volunteer organizations.
- The Haredi community's trust in the IDF's senior command is very low relative to other population groups.
- Haredi Israelis have high levels of trust in the government and the prime minister; their policy views are consistent with those who self-identify as being on the right-wing of the Israeli political spectrum.
- There has been a rise in the percentage of Haredi Israelis who believe the war will not reinforce Haredi integration into the broader society.
- In contrast to last year, most ultra-Orthodox observe a rise in tension between non-Haredi and Haredi Israelis due to the war.
- There has been a rise in the share of Haredim who support cutting Haredi budgets more than other budget areas.
- 41% of Haredi Israelis say that the leaders of the Haredi parties do not represent them (an increase over last year).
- A majority of Haredi Israelis (68%) are concerned about the state of social cohesion in the country.
- Most Haredi Israelis express high confidence that Israel will win the war.
- 74% of Haredi Israelis are optimistic about the country's future – a larger percentage than for any other sector.

Haredi Conscription

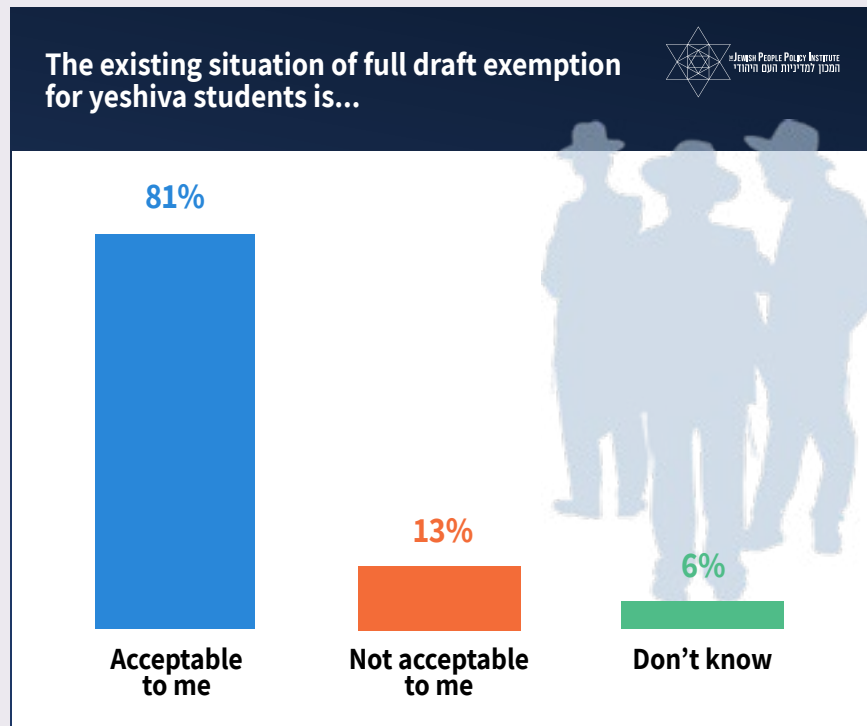
A majority of ultra-Orthodox (Haredi) Israelis (63%) anticipate that the war will not significantly change Haredi society. Twenty-nine percent say the war will lead to some degree of positive change in Haredi integration into general Israeli society, but only 5% believe the war will generate significant movement in societal integration. These figures reflect a change compared to findings from a year ago: the percentage of ultra-Orthodox who feel that the war will not significantly alter Haredi society has risen, and the share of ultra-Orthodox Israelis who think the war will effectuate some degree of change in Haredi society has dropped. Regarding the three main Haredi subgroups, as commonly defined: a third of Sephardi ultra-Orthodox (32%) feel there will be a degree of change regarding Haredi integration into the broader Israeli society, a similar percentage was found among the Litvaks (Lithuanians) (30%), while the lowest percentage was found among the Hasidim (21%). Seventy-four percent of Haredi United Torah Judaism voters said that the war will not significantly change ultra-Orthodox society. The percentage of Chabad Hasidim who believe the war will lead to a measure of change in Haredi integration into the broader Israeli society is the highest of all (45%), but they are a relatively small subgroup within Israel's ultra-Orthodox population (4% of the survey respondents).



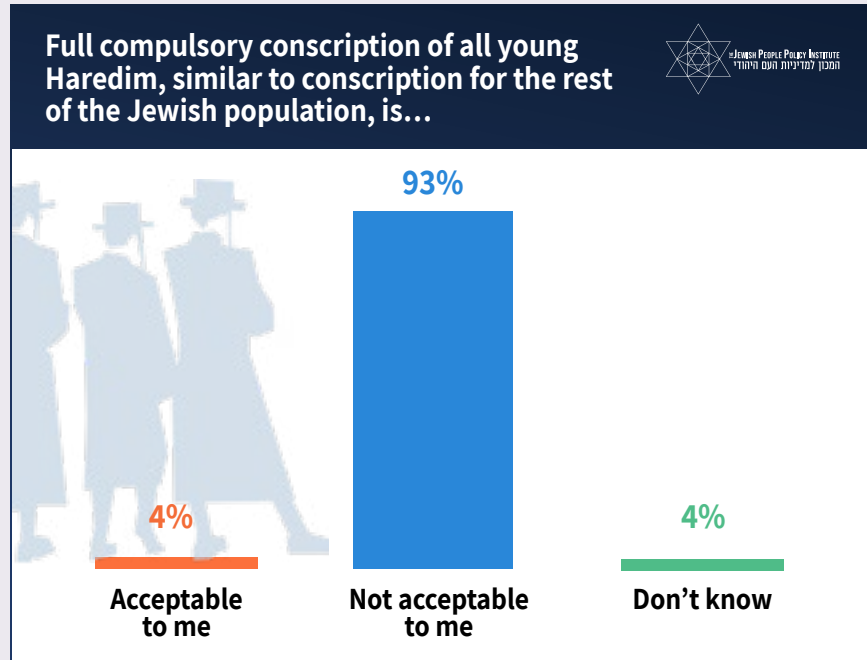
This survey looks at a number of options for resolving the issue of drafting Haredi yeshiva-students. Respondents were presented with each option separately, so we could determine which options generate a greater or lesser degree of consensus (acceptable to me/ unacceptable to me).

Most respondents (81%) say a **full draft exemption** for yeshiva students is acceptable to them. This constitutes a slight increase compared to a similar question posed last year, when 78% said

that “[t]he existing situation of full draft exemption for yeshiva students is acceptable to me.” (Last year’s respondents were not presented with each option separately, but rather asked to mark, in a single question, the options acceptable to them, meaning that a comparison between the questions gives an indication of change but cannot explicitly attest to it). An eighth of ultra-Orthodox respondents this year (13%) find a blanket Haredi exemption unacceptable. The share of those who say a blanket Haredi exemption is unacceptable was especially high among Chabad Hasidim, a quarter of whom gave this response. Furthermore, ultra-Orthodox who voted for the Religious Zionism Party and for the Likud said that the existing situation is unacceptable to them (70% and 58%, respectively). This is in contrast to a large majority of ultra-Orthodox United Torah Judaism voters (91%) and Shas voters (84%), who constitute a large majority of Haredi Israelis, as well as to ultra-Orthodox Otzma Yehudit voters (70%), who said that the existing situation of full draft exemption for yeshiva students is acceptable to them.

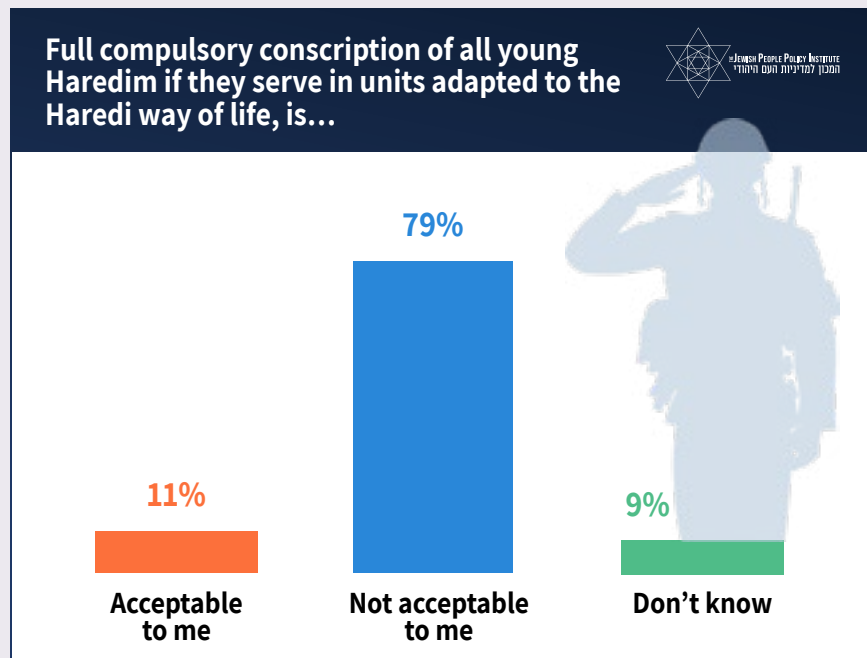


An overwhelming majority of Haredi Israelis (93%) say that **full compulsory conscription**, similar to conscription for all other Israeli Jewish subgroups, is **unacceptable to them** (last year, 1% of the respondents said that full compulsory conscription was acceptable to them). On this question there are no major differences between the various streams in Haredi society – all show a large majority of over 85% who oppose the full compulsory conscription of all young ultra-Orthodox males similar to

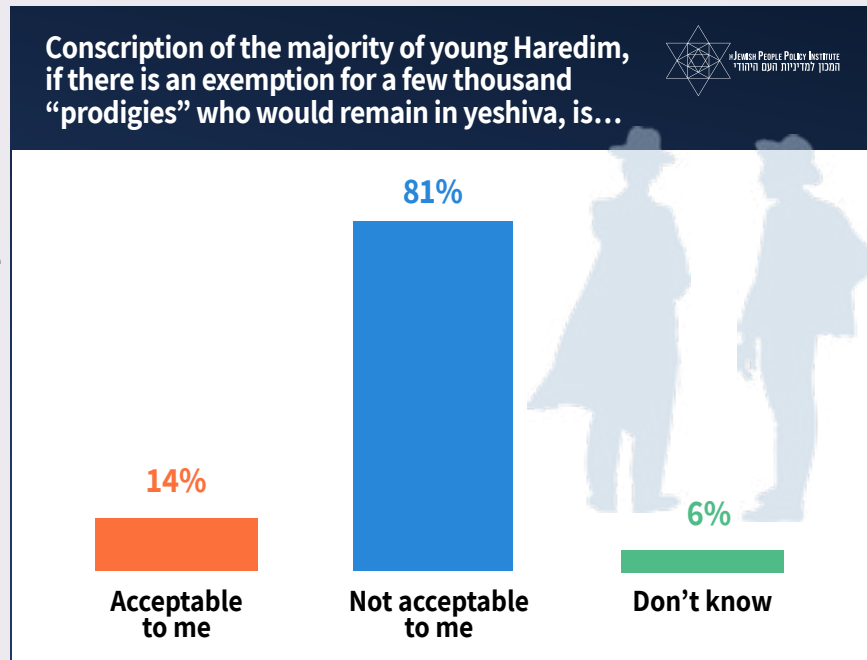


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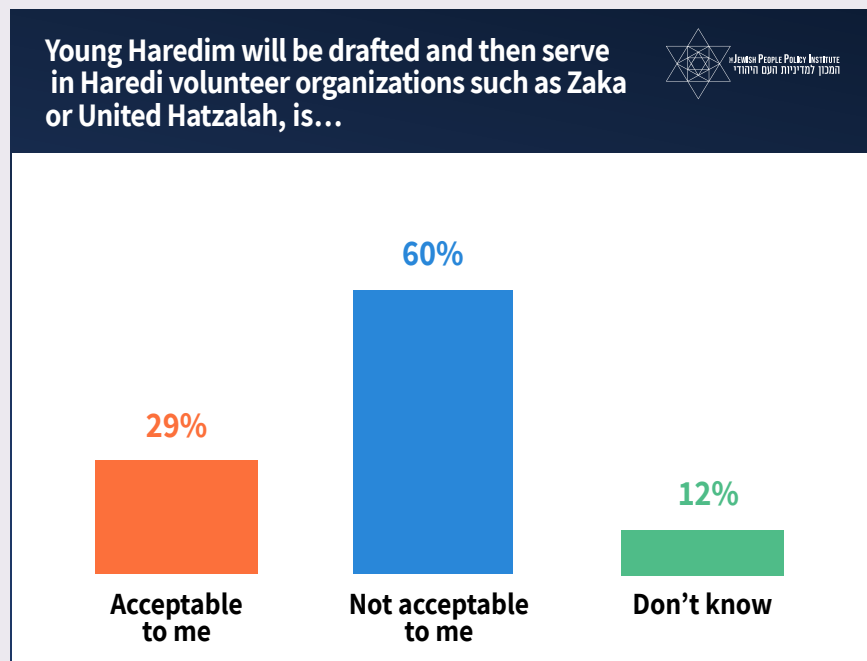
A large majority of ultra-Orthodox (79%) oppose the option of full compulsory conscription of all draft-eligible young Haredi Israelis, **even if they were to serve in units adapted to the Haredi way of life**. Among all ultra-Orthodox streams, a majority oppose this option. Among Sephardim, three in four respondents consider this option unacceptable. Among Hasidic and Lithuanian respondents, over 80% consider it unacceptable. Most Haredi Netanyahu voters, a third of Haredi Likud and Religious Zionism Party voters, and a quarter of Haredi Otzma Yehudit voters consider this option to be acceptable.



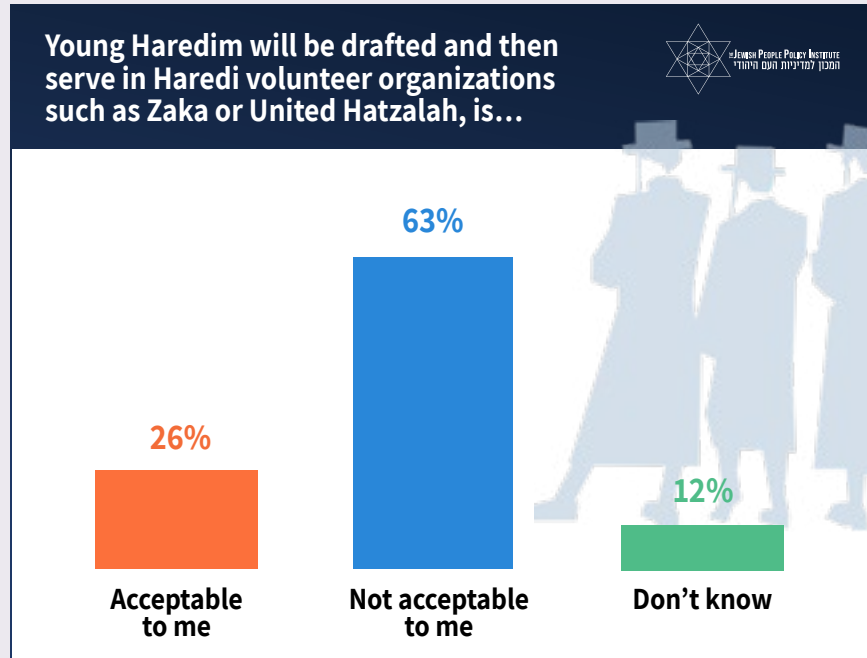
Most ultra-Orthodox (81%) oppose the option of **conscription of most young Haredim**, even if there were **an exemption for a few thousand *iluyim* or “prodigies” who would remain in yeshiva**. Approximately one in every eight respondents finds this option acceptable. A majority of each of the main Haredi subgroups (and half of Chabad) say that this option is unacceptable to them.



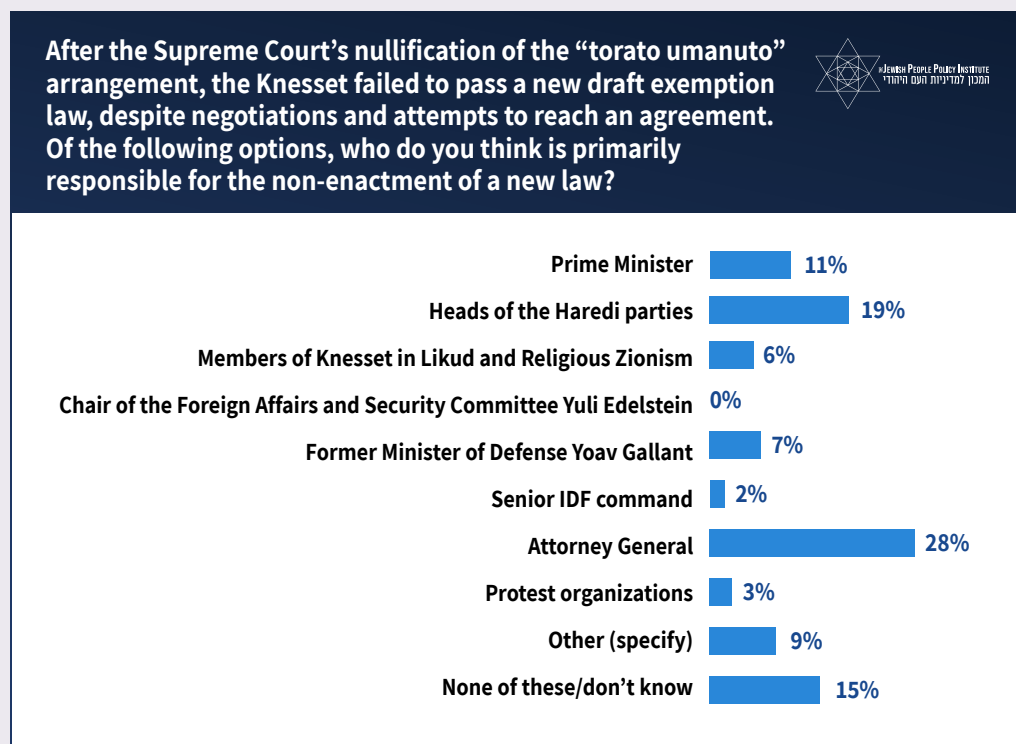
Most ultra-Orthodox Israelis (60%) oppose the option of young Haredim being inducted but then serving with Haredi volunteer organizations such as ZAKA or United Hatzalah, while 29% find this option acceptable. A quarter of Haredi Shas voters and a fifth of Haredi United Torah Judaism voters consider this option acceptable. Half of Chabad, a third of Hasidim and Sephardim, and a fifth of Lithuanians find the option acceptable.



A majority of ultra-Orthodox (63%) oppose the option of young Haredim not being inducted but rather obligated to perform national service according to the needs of the state, while a quarter (26%) do find this option acceptable. Most respondents in all of the main Haredi subgroups do not find the option acceptable. Forty percent of Chabad adherents, a quarter of Hasidim and Sephardim, and a fifth of Lithuanians find the option acceptable.

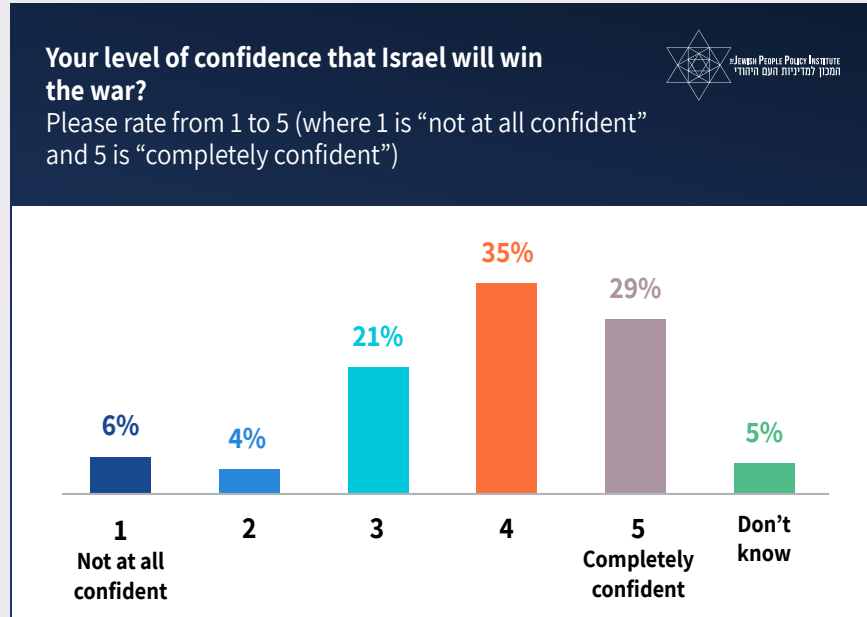


We sought to determine whom the respondents consider the main party responsible for the Knesset not passing a new exemption law for young Haredim, after the Supreme Court revoked the legality of the *torato umanuto* (“Torah study is his occupation”) arrangement. Twenty-eight percent of respondents think the Attorney General bears responsibility, and this response received the highest percentage, significantly outstripping other options. A fifth of Haredim think the heads of the ultra-Orthodox political parties bear the responsibility, and a tenth think the prime minister is primarily responsible for the non-enactment of a new exemption law.



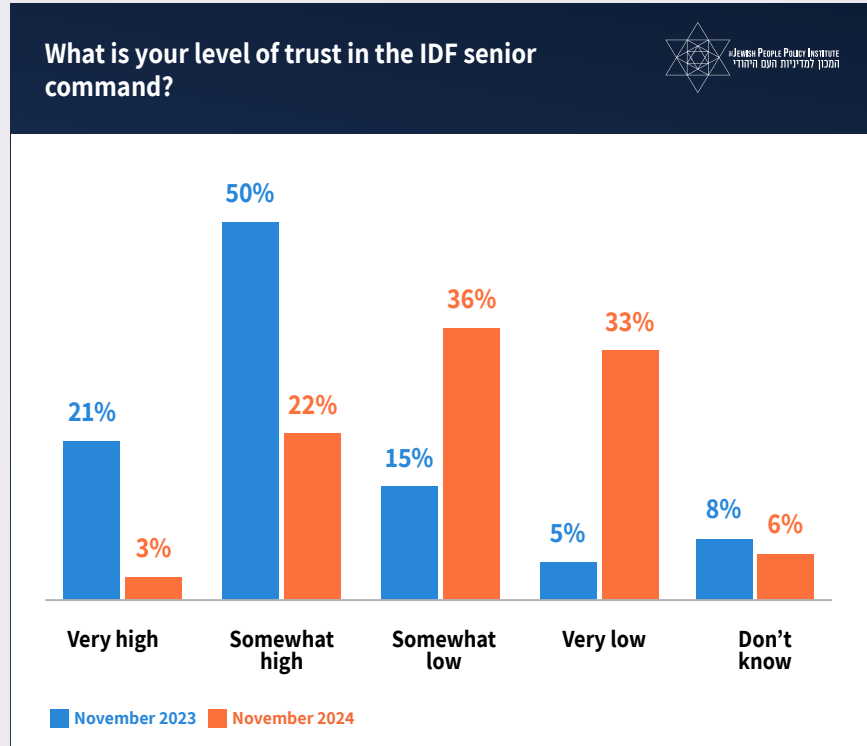
Trust in Leadership and Confidence of Victory

Most ultra-Orthodox Israelis (64%) rate their confidence that Israel will win the war as high (4 + 5 out of 5), a percentage nearly identical to that of Israel’s general Jewish population (68% as of last month). At the time this survey was conducted, a ceasefire with Lebanon had been declared, while the fighting in Gaza continued. The survey was conducted after the dismissal of the defense minister, Yoav Gallant.



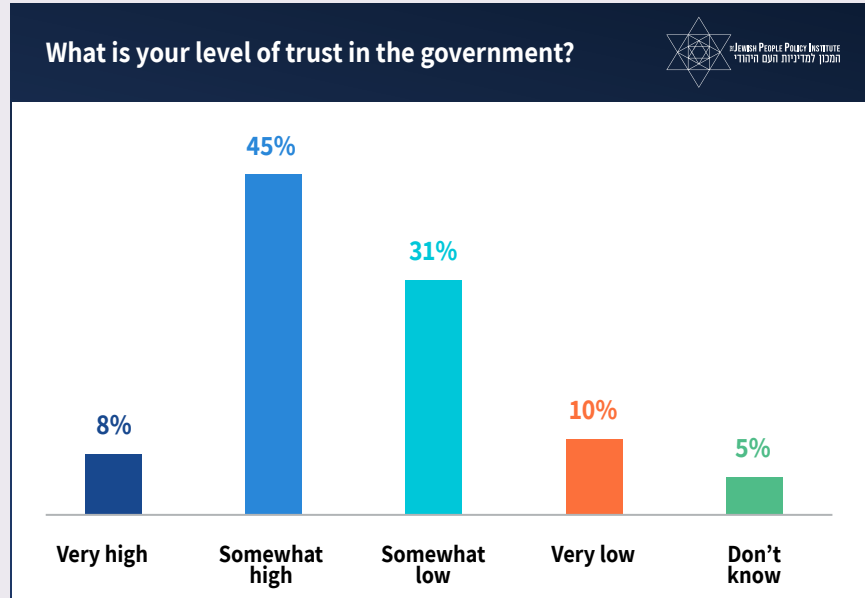
The Haredi groups showing the highest confidence levels regarding the possibility of Israeli victory in the war are the Sephardim (70%), the Hasidim (67%), and the Lithuanians (53%). Most ultra-Orthodox Shas voters (74%), Likud voters (88%), Otzma Yehudit voters (76%), and Religious Zionism Party voters (70%) demonstrated high levels of confidence (4 + 5) about the possibility of Israel winning the war.

This year’s survey shows a decline in the ultra-Orthodox community’s level of trust in the IDF command, relative to a year ago. In November 2023, most ultra-Orthodox expressed high trust (very high + somewhat high) in the IDF command. However, the wording of the question was different last year (last year: IDF commanders; this year: the IDF senior command), and this change explains a significant portion of the discrepancy in the findings, one that also appears in JPPI surveys of the general Israeli population (on this issue



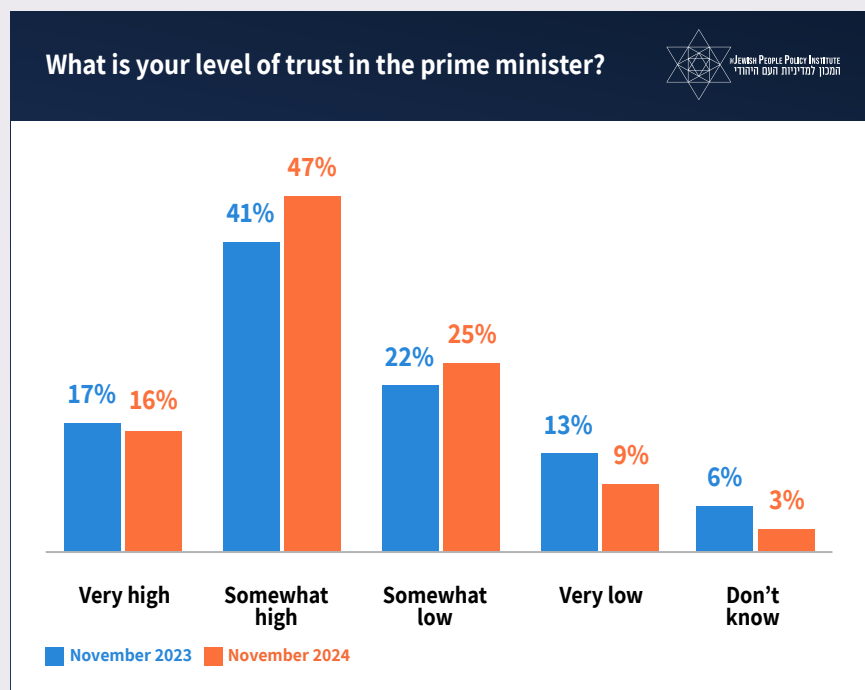
see the JPPI survey for July 2024). However, even when we take this into account, there is a major gap between Haredi trust in the IDF senior command and that of Israeli Jews generally. Last month’s JPPI Israeli Society Index (November 2024), showed that 59% of all Jews attested to somewhat high or very high levels of trust in the IDF senior command, while only a quarter of the ultra-Orthodox population showed such trust levels.

Regarding trust in the government, there has been no significant change compared to last year. In November 2023, when the ultra-Orthodox survey looked at trust “in the emergency government,” 53% expressed high or very high levels of trust, while 35% expressed low or very low levels of trust. This year, an identical share of the ultra-Orthodox say their trust in the government is high (very high + somewhat high), a third say that their trust level is “somewhat low,” while



a tenth say that their trust level is “very low.” The groups that showed the highest levels of trust in the government are the Sephardim (58%) and the Hasidim (54%); with trust levels among Lithuanians and Chabad at 49% and 40% respectively. A fifth of Haredi Likud and Religious Zionism Party voters, a third of Shas voters, and over a third of United Torah Judaism and Otzma Yehudit voters say that their trust in the government is low (very low + somewhat low).

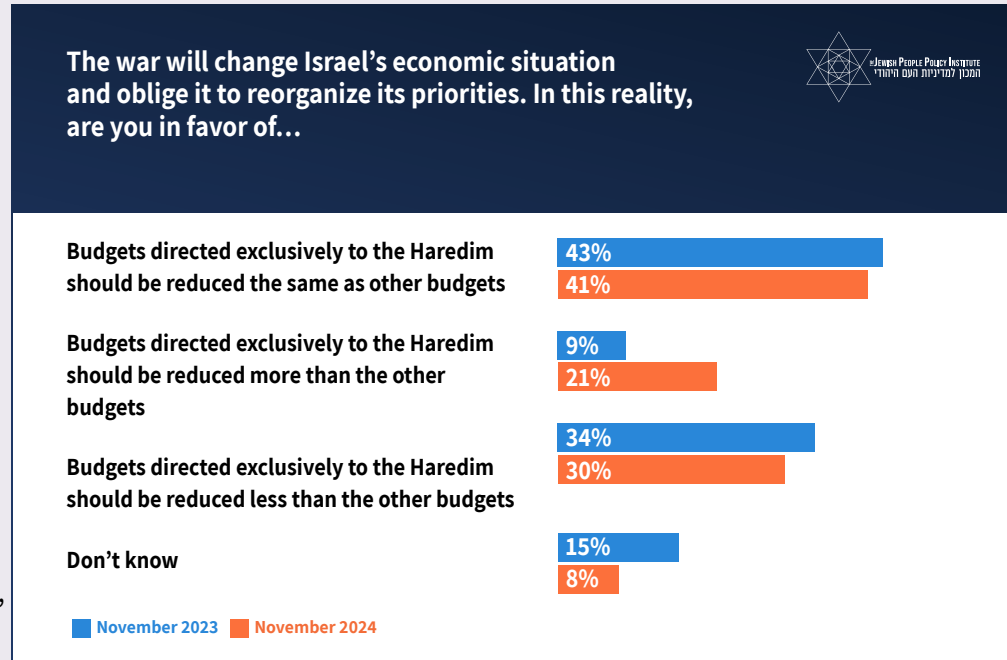
The ultra-Orthodox public’s trust in the prime minister also remains unchanged since last year (November 2023). The trust level expressed by most ultra-Orthodox in the prime minister is high (very high + somewhat high). A quarter of Haredim report their trust in the prime minister as “somewhat low,” and a tenth say it is “very low.” Haredi trust in the prime minister is higher than that of the rest of the Jewish population. Last month, 32% of all Jewish Israelis said their trust in the prime minister was high (very high + somewhat high), while 53% of the ultra-Orthodox sector gave similar ratings.



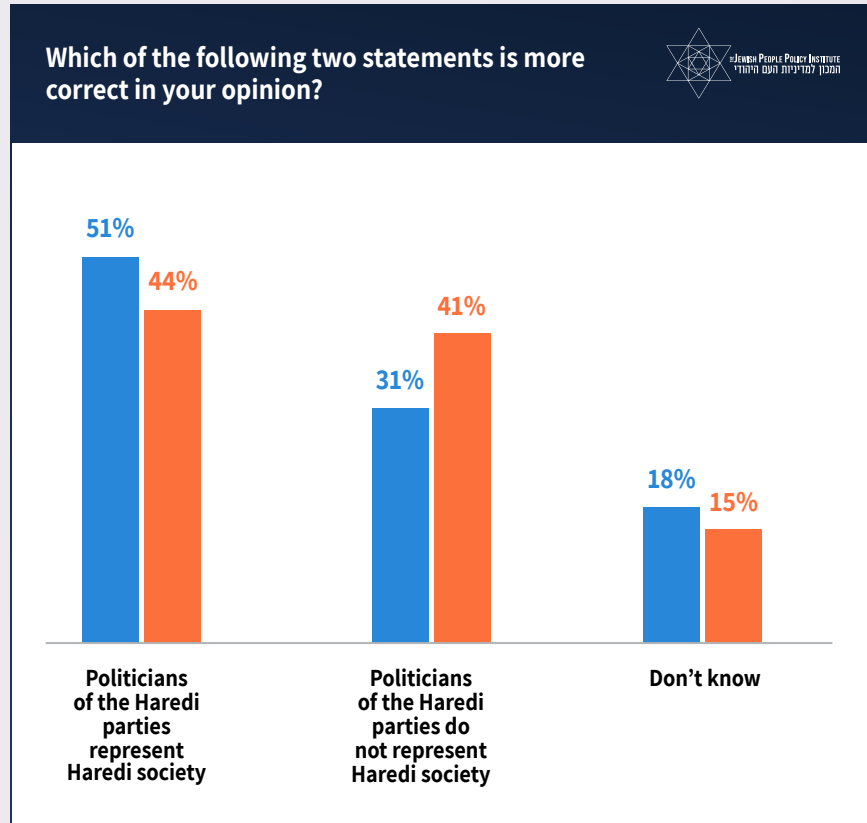
Economy and Policy

This year, like last year, we looked at Haredi views regarding war-related budget cuts. Forty-one percent of Haredim support budget cuts for their community to the same degree as those directed at other budget areas, a fifth support the option of Haredi budgets being reduced to a greater degree than other budgets, while a third favor lesser reductions than those

affecting other budgets. Compared with last year, the percentage of Haredim supporting the reduction of Haredi budgets **to a greater degree** than other budgets significantly increased. Sephardi Haredim showed the highest share (27%) of supporters of deeper Haredi budget cuts relative to other budgets, while the Hasidim are the Haredi subgroup with the highest percentage (34%) in support of smaller cuts for ultra-Orthodox budgets than for other budgets.

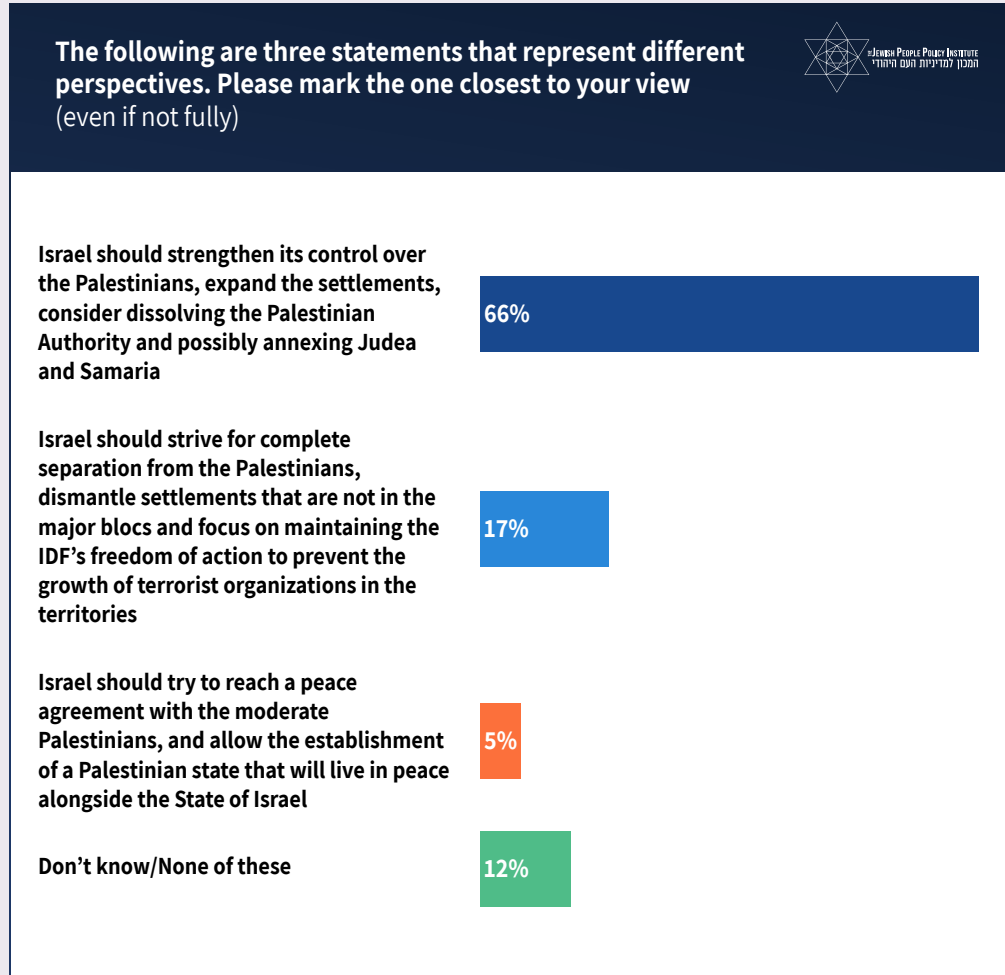


This year, like last year, we asked whether the ultra-Orthodox think that the politicians associated with the Haredi political parties represent them or not: 44% feel that these politicians do represent them, while 41% feel they do not. Compared to last year, there has been a rise in the share of those who feel that the Haredi politicians do not represent them, and a drop in the share of those who think the politicians do represent them. More than half of Hasidim (53%) feel represented by the politicians of the Haredi parties (except for Chabad Hasidim, 70% of whom maintain that the Haredi party politicians do not represent them).



Most United Torah Judaism voters (65%) feel represented, while a fifth do not. As expected, ultra-Orthodox Likud, Religious Zionism Party, and Otzma Yehudit voters say the Haredi party politicians do not represent the Haredi community.

On a question about Israeli policy in the wake of the war – a question that we also posed to the general population – most ultra-Orthodox (66%) feel that Israel should tighten its control over the Palestinians, expand the settlements, consider dissolving the Palestinian Authority, and perhaps annex Judea and Samaria (the West Bank). A fifth of Haredi Israelis believe that Israel should strive for complete separation from the Palestinians, dismantle settlements outside the large

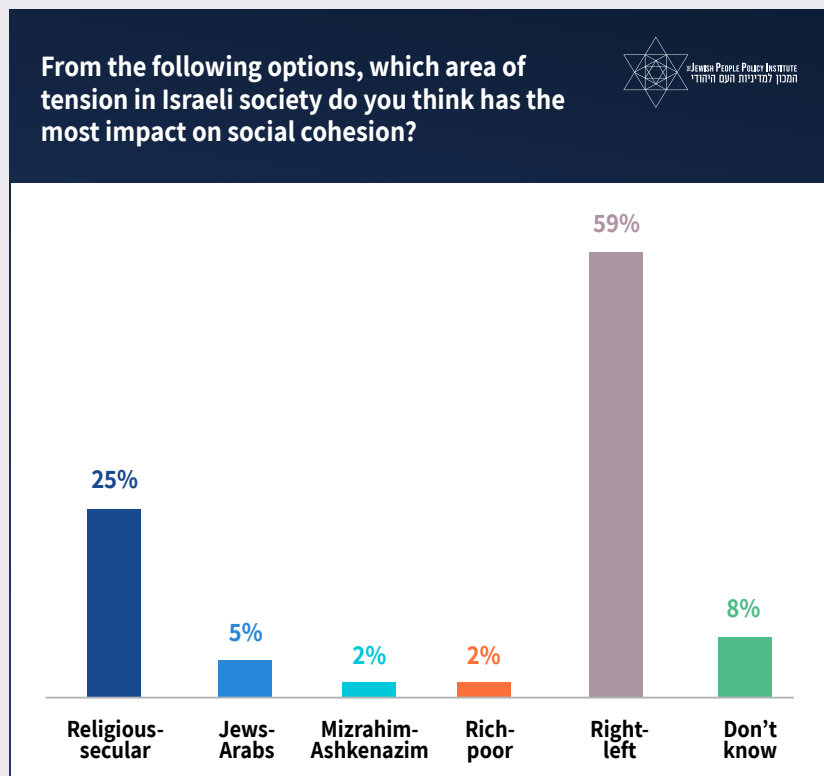
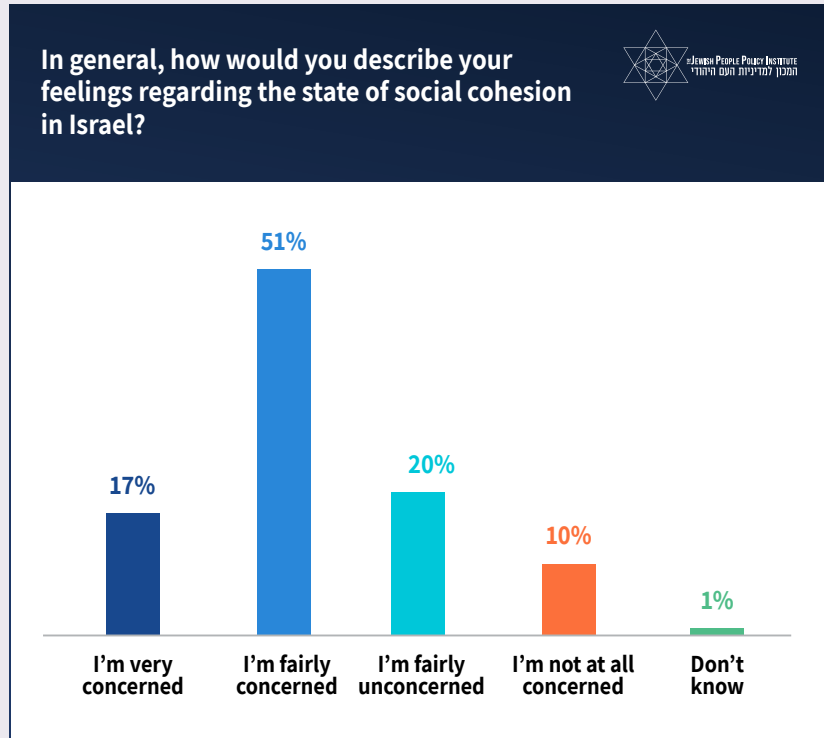


settlement blocs, and focus on maintaining the IDF's freedom of action to prevent the growth of terrorist organizations in the territories. These views position most Haredi Israelis at the "right-wing" end of the political spectrum. For comparison, last month 77% of those who self-identify as right-wing said Israel "needs to strengthen its control over the Palestinians, expand the settlements, consider dissolving the Palestinian Authority, and possibly annex Judea and Samaria." In all of the other ideological groups (including the center-right), "complete separation from the Palestinians" was preferred.

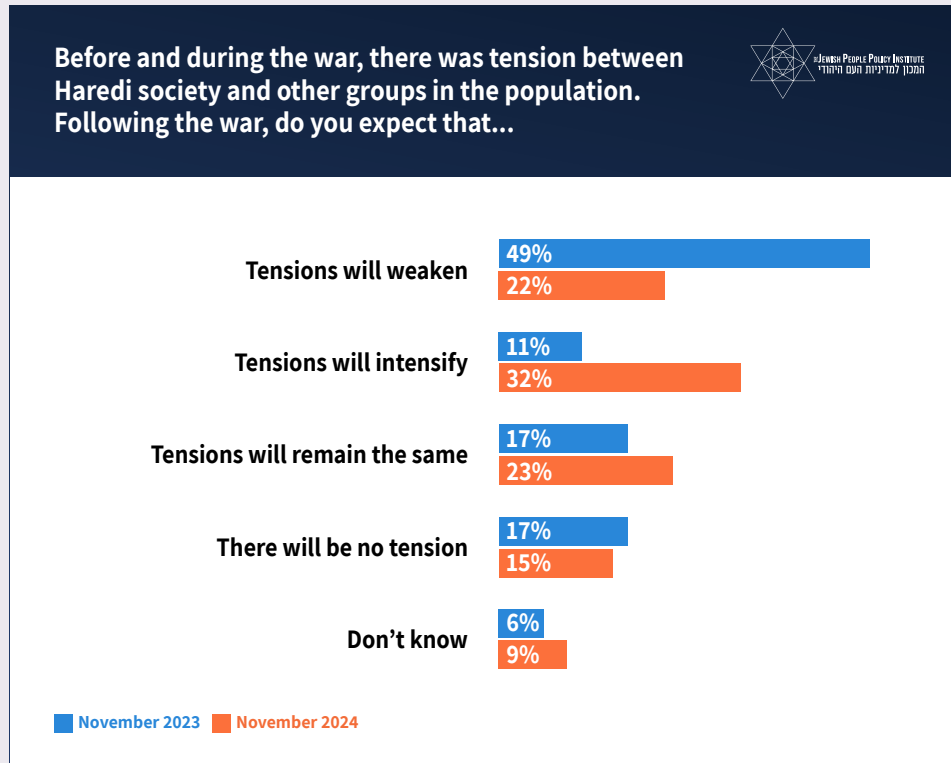
Israeli Social Cohesion

A majority of ultra-Orthodox (68%) are concerned (very concerned + fairly concerned) about the state of Israeli social cohesion. A fifth of ultra-Orthodox are “fairly unconcerned” while a tenth are “not at all concerned.” Among Haredi subgroups, the most concerned (very + fairly concerned) are the Sephardim (74%), followed by the Hasidim and the Lithuanians (66%), and finally Chabad (60%). When the responses are broken down by political-party support, the most concerned voters are Shas voters (75%) and United Torah Judaism voters (70%), followed by Likud voters (65%) and Religious Zionism Party voters (60%), and finally by Otzma Yehudit voters (49%).

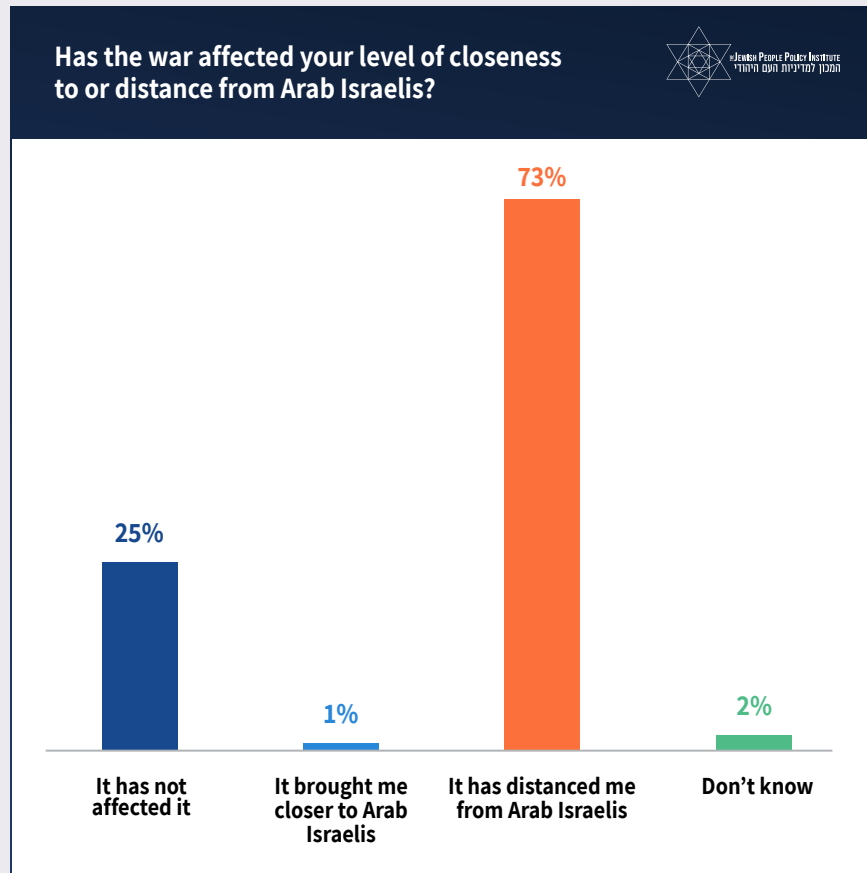
Most ultra-Orthodox (59%) feel that the area of tension most strongly impacting Israeli social cohesion is that between the political right and left. A quarter feel that the area of tension with the greatest impact is between the religious and the secular.



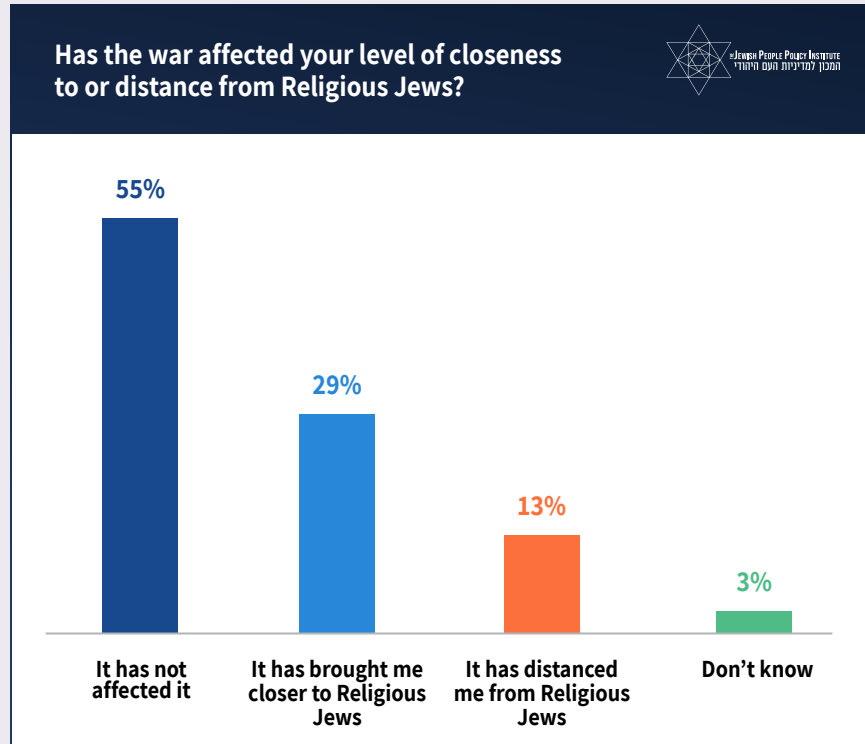
There is no consensus within the ultra-Orthodox population about how the war will affect tensions between the Haredim and other population subgroups. A third of ultra-Orthodox Israelis feel that tensions between the Haredim and other population subgroups will intensify due to the war; 23% feel that tensions will remain as they are now; 22% believe that they will weaken, and 15% think that there will be no tension. Compared with last year, there has been a major decline in the percentage of Haredi Israelis who think the war will cause tensions to abate – last year half felt this way. Now, a fifth think tensions will intensify – last year only a tenth thought so.



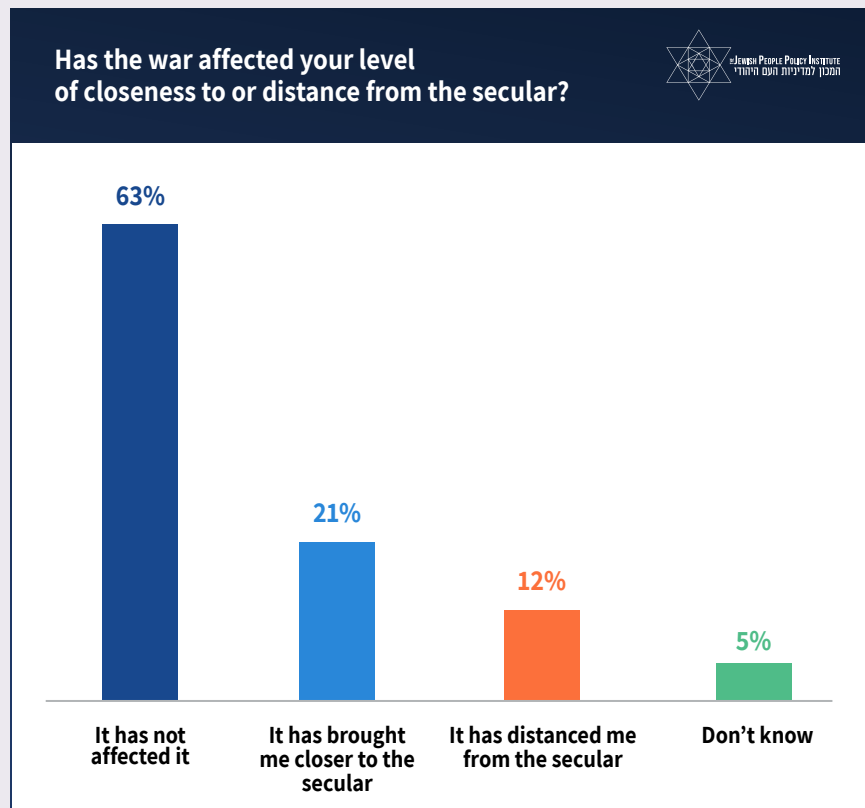
Respondents were asked whether the war had affected their sense of closeness to or distance from other listed Israeli subgroups. Most ultra-Orthodox (73%) say the war has distanced them from Arab Israelis, while a quarter say that the war has not affected their sense of closeness to, or distance from, them. Chabad is the ultra-Orthodox stream with the highest percentage (90%) of respondents saying the war has distanced them from Arab Israelis. The Lithuanian Haredim have the lowest percentage feeling this way (69%). In a breakdown by voting patterns, 83% of Haredi Otzma Yehudit voters, 80% of Haredi Religious Zionism Party voters, 75% of Haredi Shas voters, 70% of Haredi United Torah Judaism voters, and 65% of Haredi Likud voters say the war has distanced them from Arab Israelis.



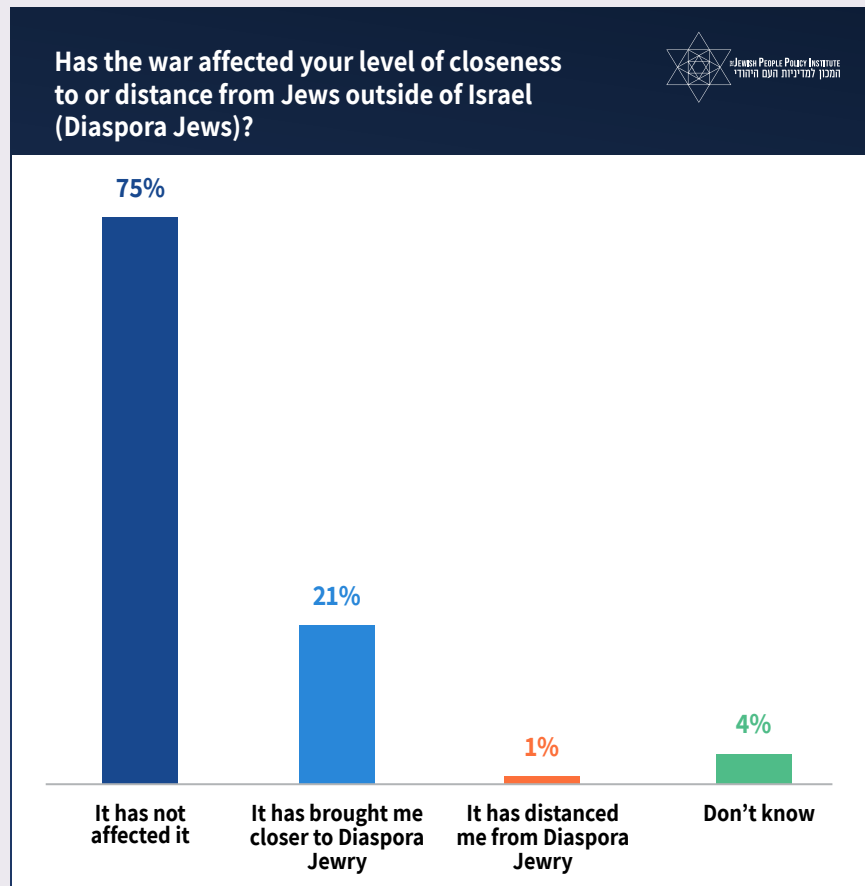
Most ultra-Orthodox (55%) say that the war has not affected their sense of closeness to, or distance from Religious Jews (“kippa sruga”), a group comprising Religious Zionists, Traditionalists, and Modern Orthodox; 29% say the war has brought them closer to Religious Jews; and an eighth (13%) say the war has distanced them from Religious Jews. Hasidim are the Haredi subgroup with the highest share (16%) of respondents who say that the war has distanced them from Religious Jews (except for Chabad, 50% of whom said that the war has brought them closer to them).



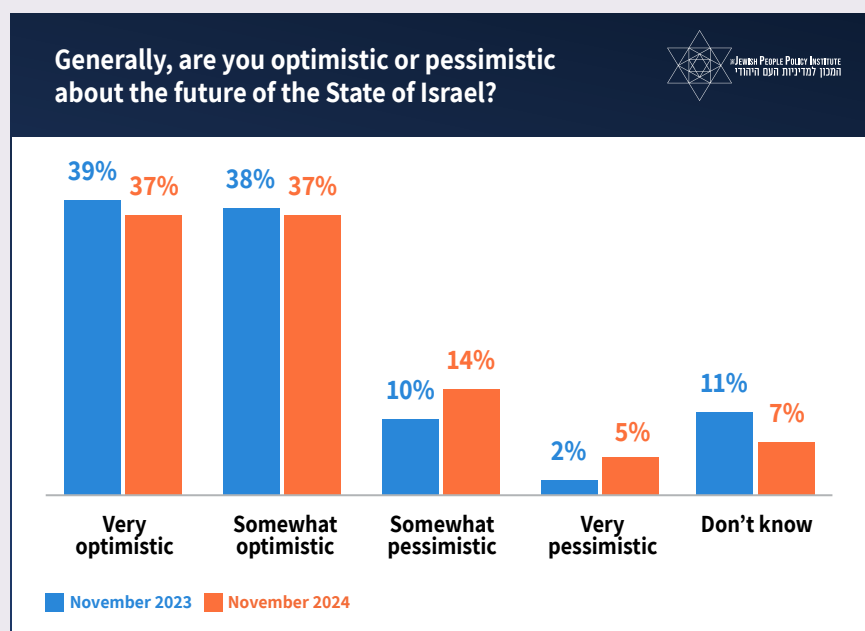
A majority of ultra-Orthodox Israelis (63%) say the war has not affected their sense of closeness to, or distance from, the secular. A fifth report feeling closer to the secular public due to the war, while an eighth feel more distant. The Haredi subgroup with the highest percentage (30%) of respondents saying the war has brought them closer to the secular is Chabad, while the stream with the lowest share (16%) who gave this response is the Lithuanians.



Most ultra-Orthodox (75%) say that the war has not affected their degree of closeness to, or distance from, Diaspora Jewry. A fifth of Haredim say the war has brought them closer to Jews living outside of Israel. The stream with the lowest percentage saying the war has brought them closer to Diaspora Jewry is the Hasidim (excluding Chabad).



Most ultra-Orthodox (74%) are optimistic (very optimistic + somewhat optimistic) about the State of Israel's future; a fifth (19%) say that they are pessimistic (very pessimistic + somewhat pessimistic). The percentage of Haredim who are optimistic about Israel's future is higher than that of the total Jewish population – 60%. Relative to last year, there have been no changes in Haredi optimism levels regarding Israel's future. All Haredi groups have similar optimism levels, but we can



discern a difference in optimism levels between men and women – across Haredi streams, the percentage of women who say that they are “very optimistic” about Israel's future is lower than that of men.

- The Jewish People Policy Institute's December Israeli Society Index survey was conducted between November 25 and December 1, 2024. Data was collected by Askaria (501 ultra-Orthodox (Haredi)-sector respondents via an online poll). Data was analyzed and compared to data collected via the Askaria online panel in November 2023. Shmuel Rosner and Noah Slepko compile the JPPI Israeli Society Index; Professor David Steinberg serves as a statistical consultant.