

Survey of Israeli Public Opinion

July 23, 2024



About the Council for a Secure America

The cornerstones of American national security are: a strong military, a vibrant economy, enduring alliances, and American ingenuity. The Council for Secure America was founded on the premise that American energy independence, in all of its forms, is the underpinning for U.S. security.

For decades, American foreign policy was forced to make concessions to foreign nations who fueled its economy. In 2019, thanks to the innovation of American energy producers, the United States achieved energy independence. This accomplishment made America the leading energy producer in the world, fortifying its national security and buttressing geo-political stability in the Middle East.

Amongst America's many allies, the US-Israel partnership is a strategic, long-lasting and ongoing bilateral alliance. Energy independence has only strengthened it.

CSA educates key audiences on the importance of domestic energy production and technologies to American and Israeli mutual national security interests.

Moreover, American energy statecraft has reshuffled the geopolitical landscape and sowed the seeds of peace in the Middle East, enabling old adversaries to become allies. In 2020, the United States brokered the Abraham Accords—promoting unprecedented normalization and multilateral ties between its closest ally, Israel, and Arab States including the United Arab Emirates, the Kingdom of Bahrain, Sudan, and the Kingdom of Morocco.

CSA champions the ideals of the Abraham Accords and their critical impact on geopolitical security and global trade. CSA is advancing these partnerships and is committed to bringing multi-faceted awareness to complex and evolving challenges.



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Survey Methodology

- Data was collected from July 8 through July 10, 2024 by Panels LTD which has conducted over 10,000 surveys in Israel since its inception in 2006. **The margin of sampling error is +/- 4.0%** with a confidence level of 95%.
- The majority of the **612 respondents** (91%) were surveyed in Hebrew via the Panels LTD online panel which includes over 30,000 active Israeli members. This sample was supplemented with 9% telephone/cellphone surveys, 7% in Hebrew to ultra-orthodox communities and 3% in Russian to Russian speaking Israelis.
- Socio-demographic quotas of age, gender, geography, heritage and religiosity were based on the most up-to-date data from the Israeli Bureau of Statistics. A slight weight was applied to the location and self-identified heritage of the survey.
- **All numbers of .5 and higher are rounded up** in this presentation.
- Respondents were filtered to likely voters by self identifying as having voted in the 2022 parliamentary elections in Israel (98% of respondents) or as having not been old enough to vote in 2022 but eligible to vote now (2% of respondents)
- While the language “likely Israeli voters” is used, it must be clear that **this data reveals the opinions of Jewish voters only in Israel and not the opinions of Israeli Arabs** who make up ~21% of the population

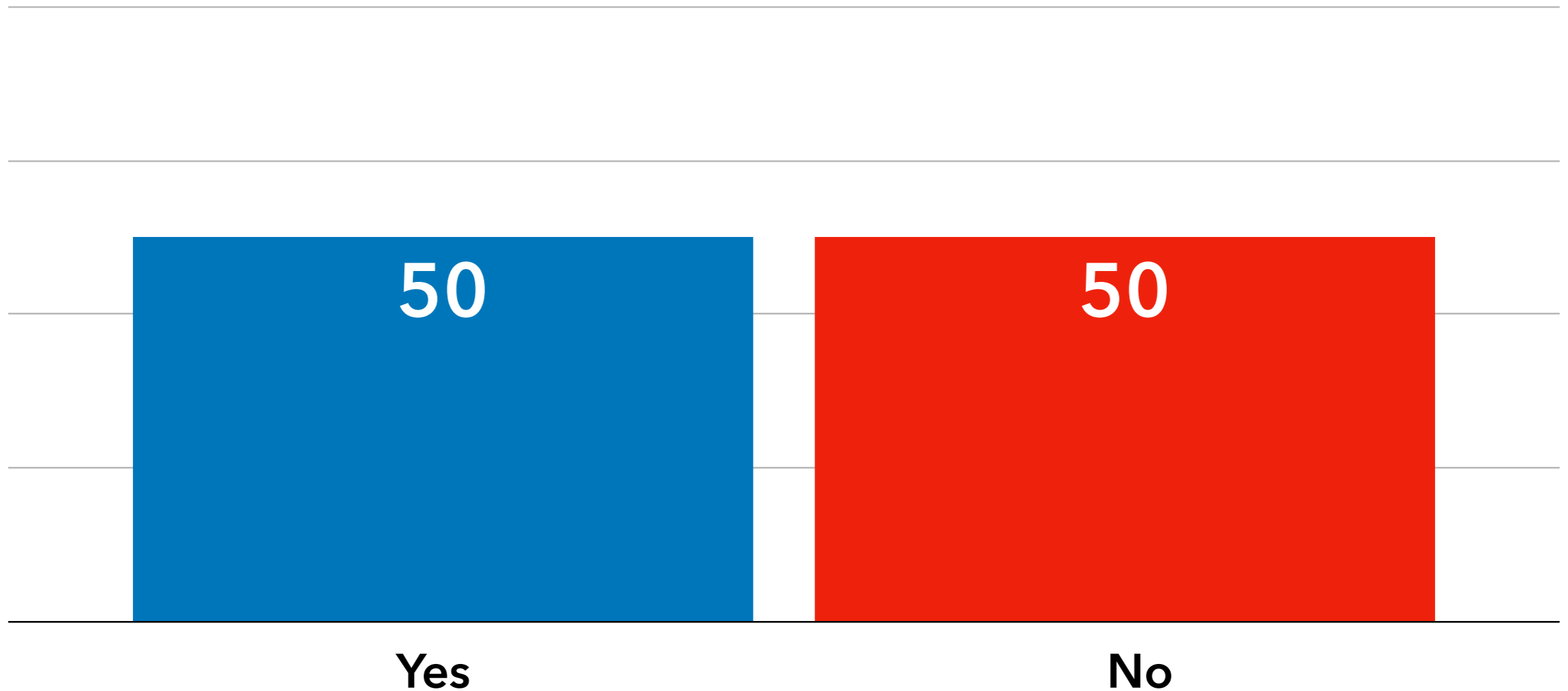


US-Israel Relationship



Exactly half of Israeli voters have visited the US

Have you ever visited the United States of America?

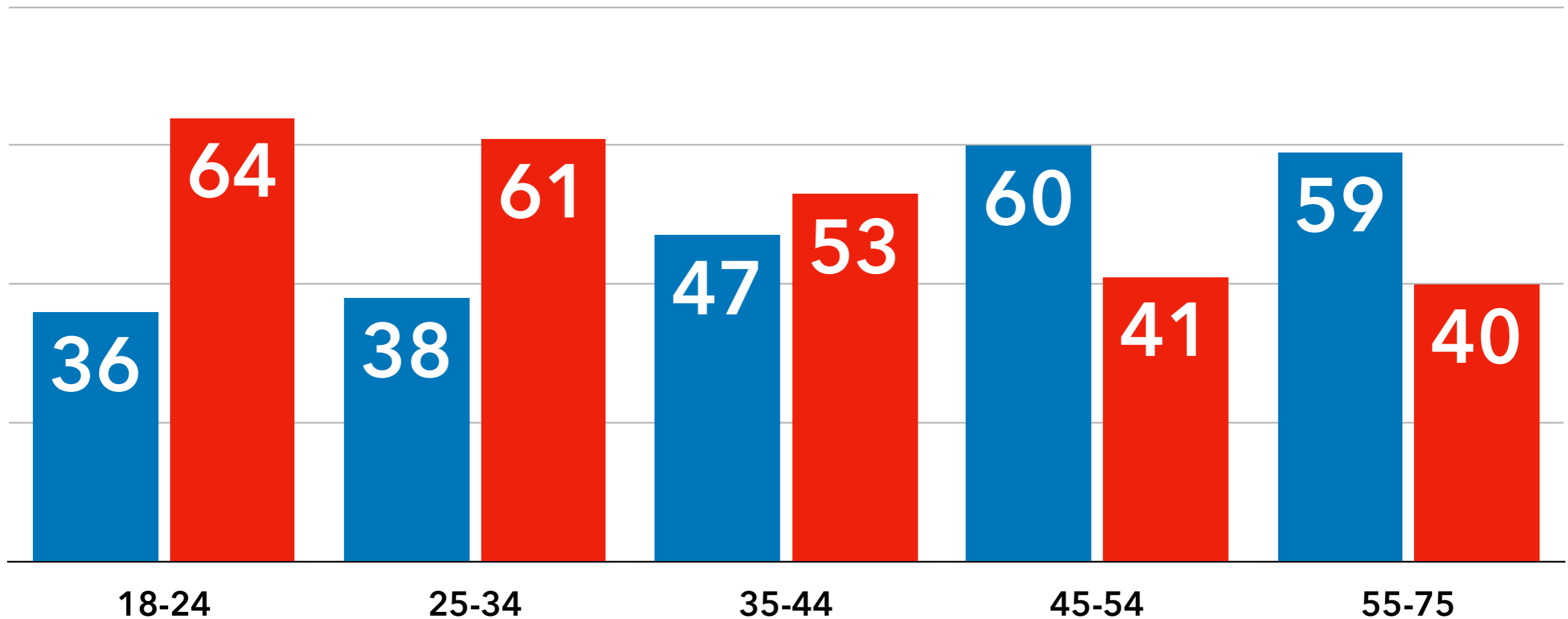


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Older voters are more likely to have visited the US

Have you ever visited the United States of America? (by age)

■ Visited US ■ Never Visited US

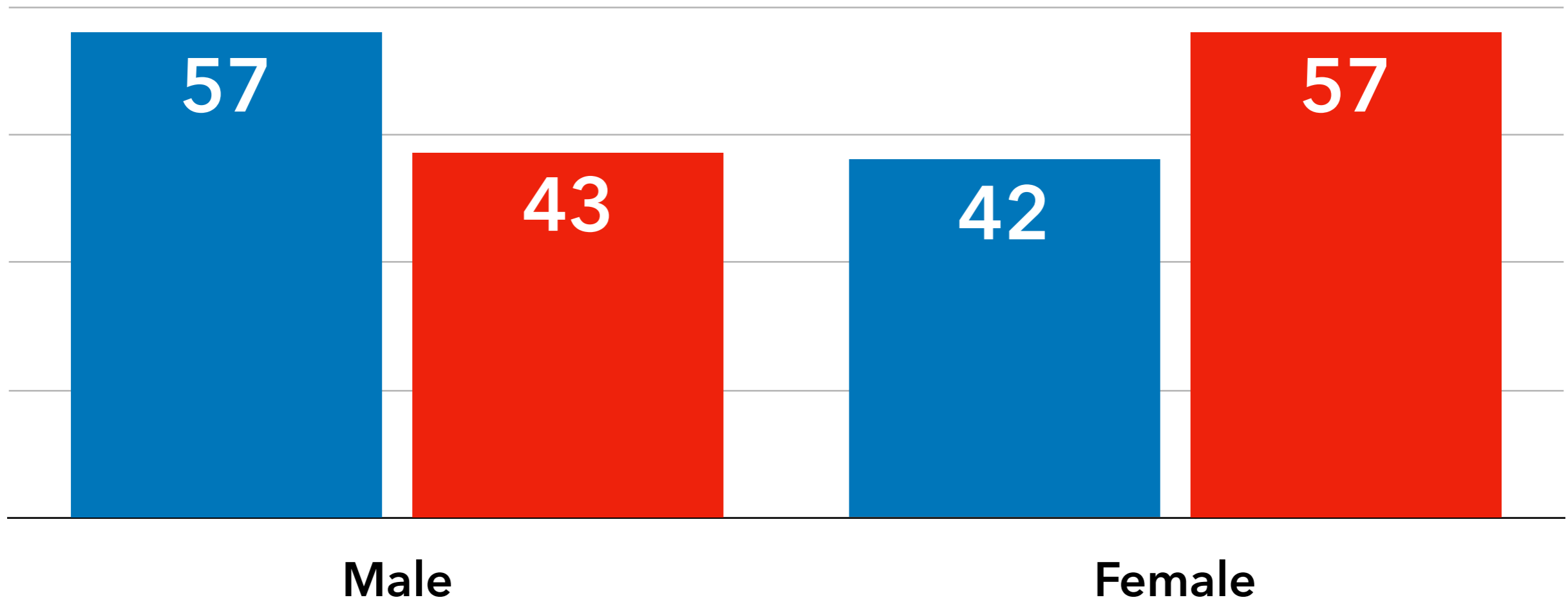


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Israeli men more likely to have visited the US than women

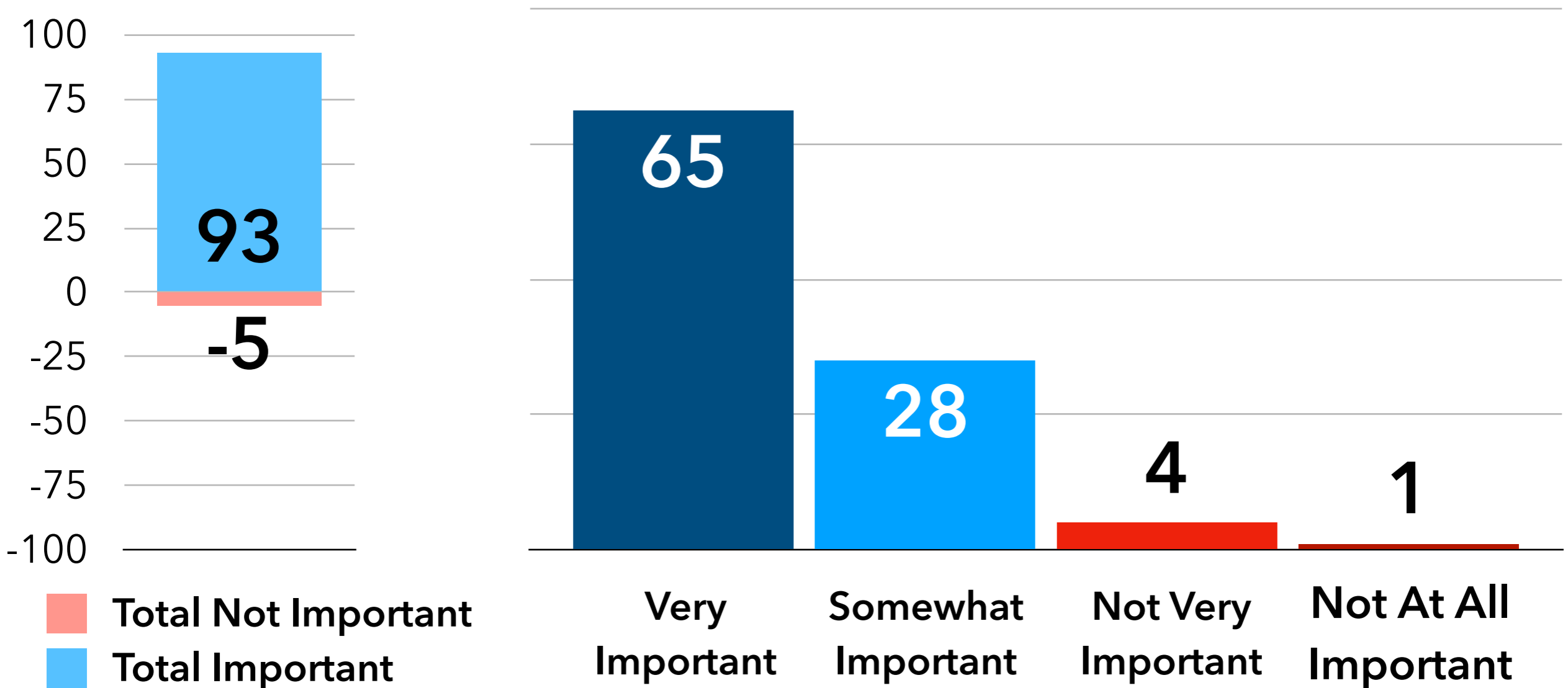
Have you ever visited the United States of America? (by gender)

■ Visited US ■ Never Visited US



Near unanimous agreement amongst Israeli voters of the importance of the Israel-US relationship

In your opinion, how important or not important do you think the State of Israel's relationship is with the United States? (ROTATE TOP TO BOTTOM, BOTTOM TO TOP)

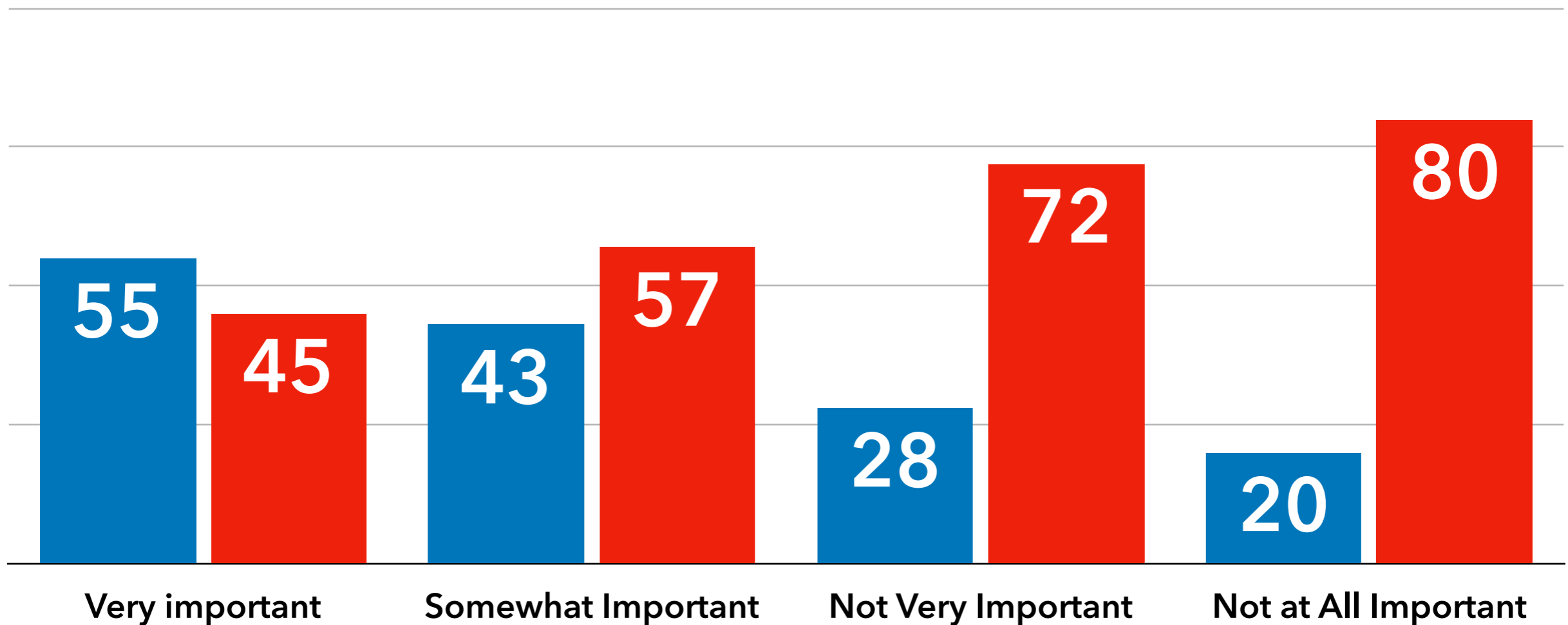


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Israelis who have visited the US are more likely to believe the US-Israel relationship is important, versus those who have never visited

In your opinion, how important or not important do you think the State of Israel's relationship is with the United States? (by visit the US)

■ Visited US ■ Never Visited US

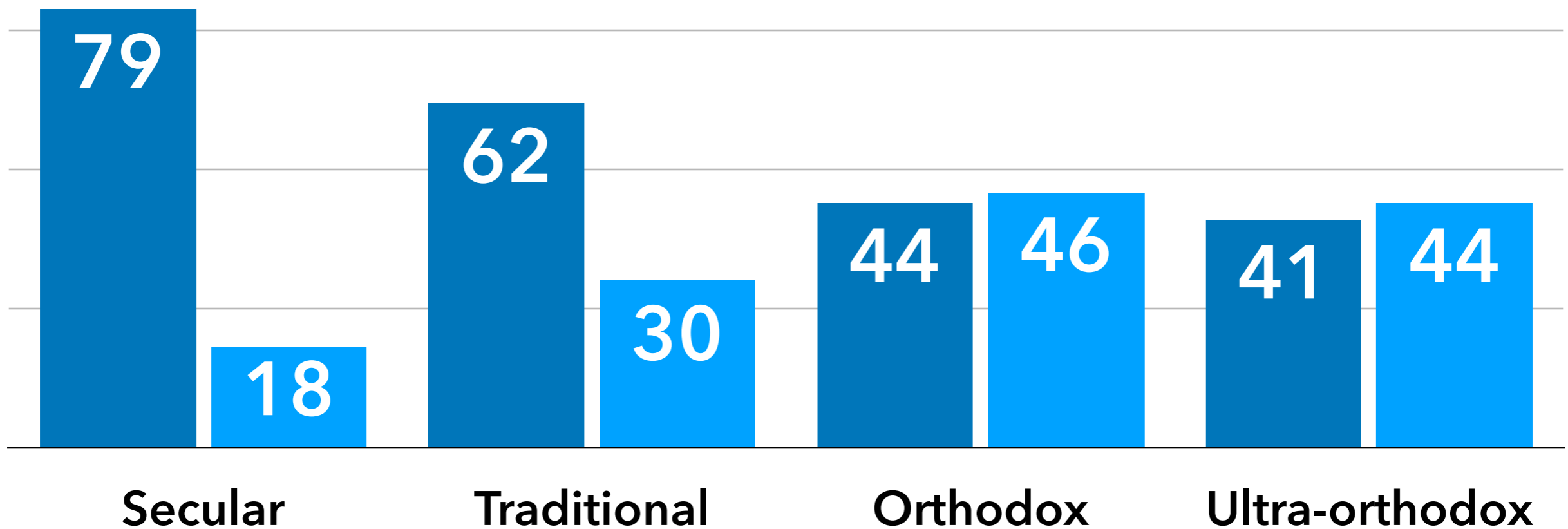


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The more secular an Israeli, the more important the US-Israel relationship is to them

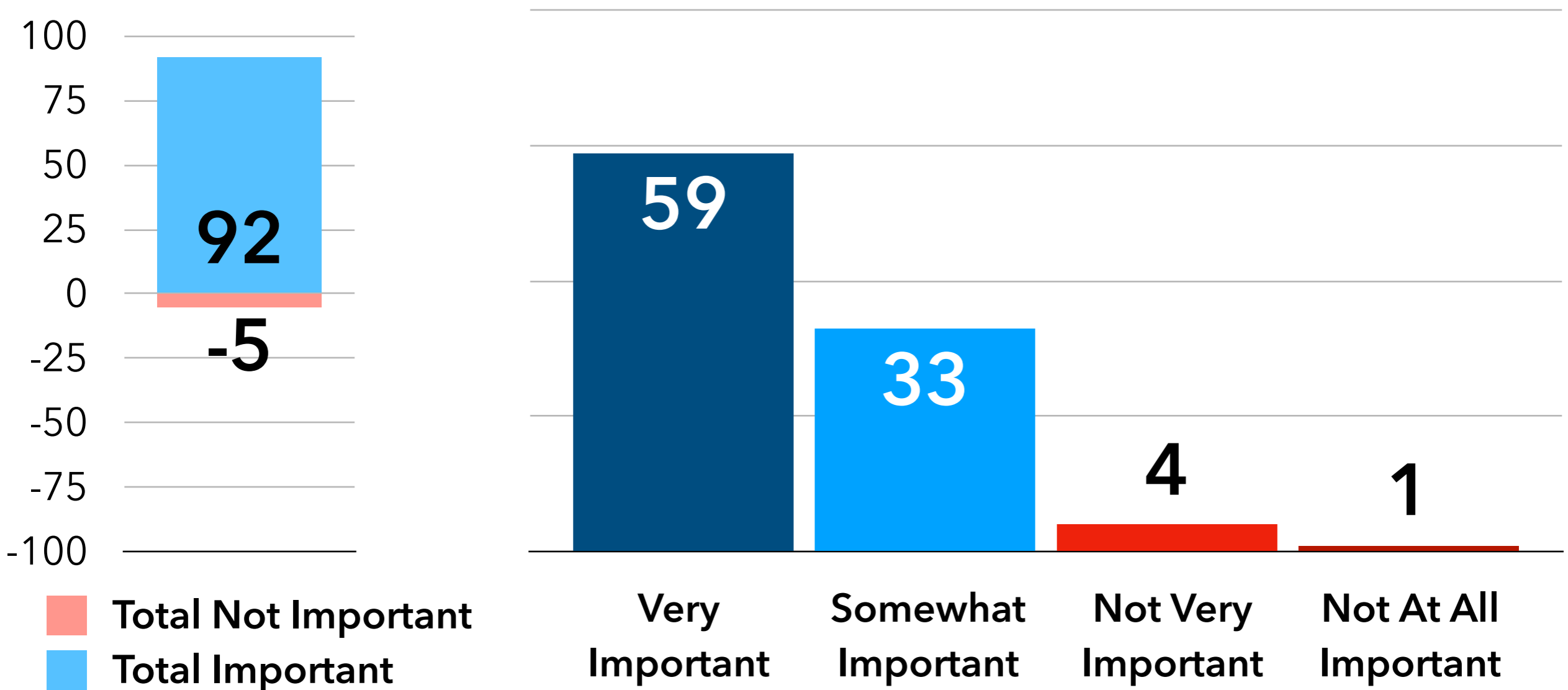
In your opinion, how important or not important do you think the State of Israel's relationship is with the United States? (by religiosity, Answer 'very important' and 'somewhat important' only)

-  US-Israel relationship is **VERY** important
-  US-Israel relationship is **SOMEWHAT** important



Near unanimous agreement amongst Israeli voters of the importance of the Israel-US relationship to Israel's economy

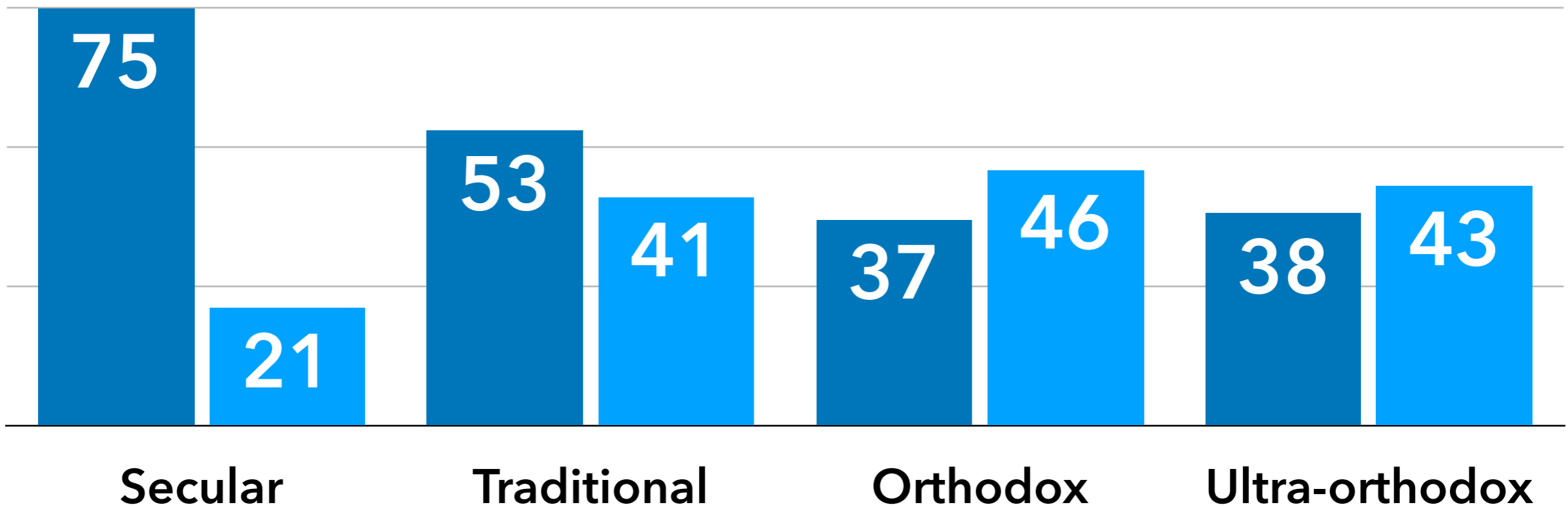
And in your opinion, thinking specifically about the **economy** of the State of Israel, how important or not important do you think the State of Israel's relationship is with the United States? (ROTATE TOP TO BOTTOM, BOTTOM TO TOP)



When thinking about Israel's economy, the more secular an Israeli then the more important the US-Israel relationship is to them

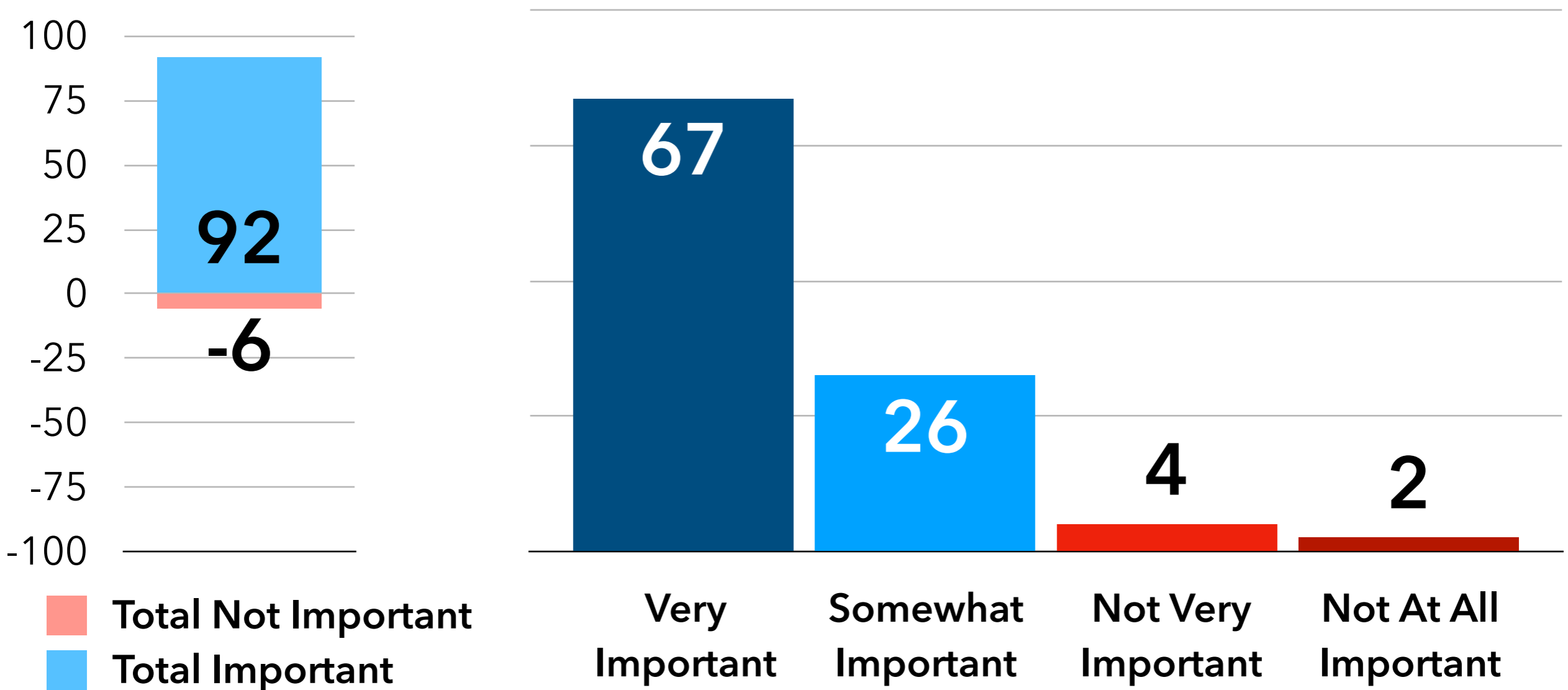
And in your opinion, thinking specifically about the **economy** of the State of Israel, how important or not important do you think the State of Israel's relationship is with the United States? (by religiosity, Answer 'very important' and 'somewhat important' only)

- US-Israel relationship is **VERY** important
- US-Israel relationship is **SOMEWHAT** important



Near unanimous agreement amongst Israeli voters of the importance of the Israel-US relationship to Israel's security

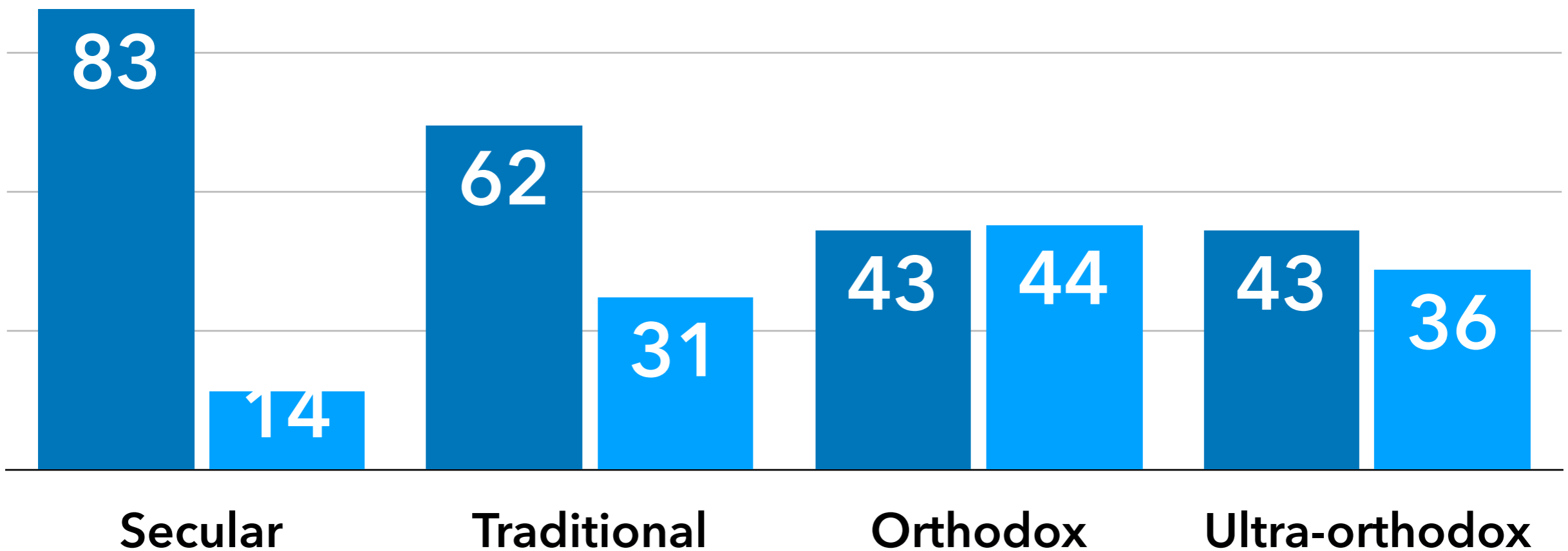
And in your opinion, thinking specifically about the **security** of the State of Israel, how important or not important do you think the State of Israel's relationship is with the United States? (ROTATE TOP TO BOTTOM, BOTTOM TO TOP)



When thinking about Israel's security, the more secular an Israeli then the more important the US-Israel relationship is to them

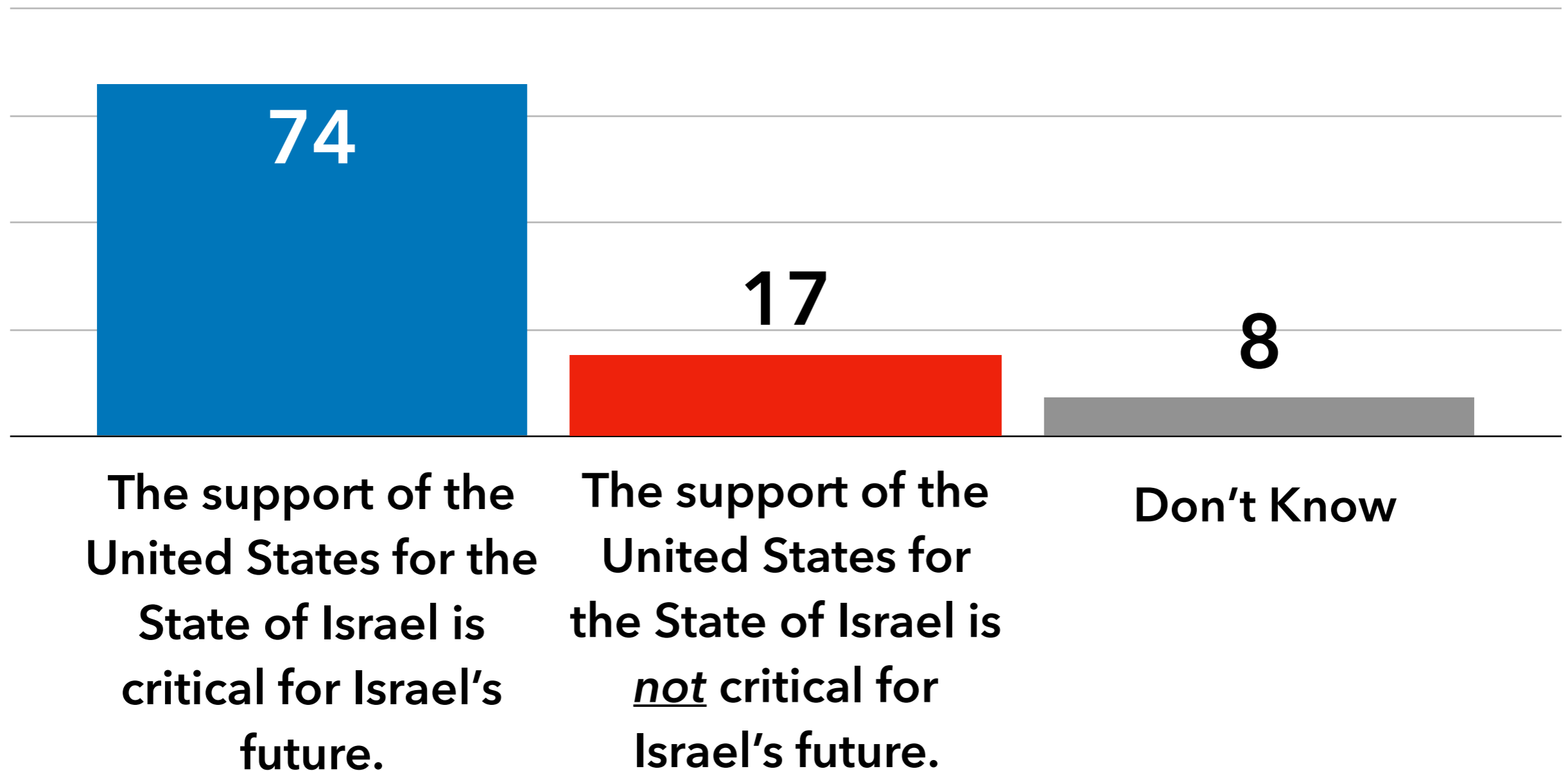
And in your opinion, thinking specifically about the **security** of the State of Israel, how important or not important do you think the State of Israel's relationship is with the United States? (by religiosity, Answer 'very important' and 'somewhat important' only)

-  US-Israel relationship is **VERY** important
-  US-Israel relationship is **SOMEWHAT** important



Nearly 3 of 4 Israeli voters see US support for Israel as critical for Israel's future

Which of the following statements comes closest to your own views? (ROTATE)

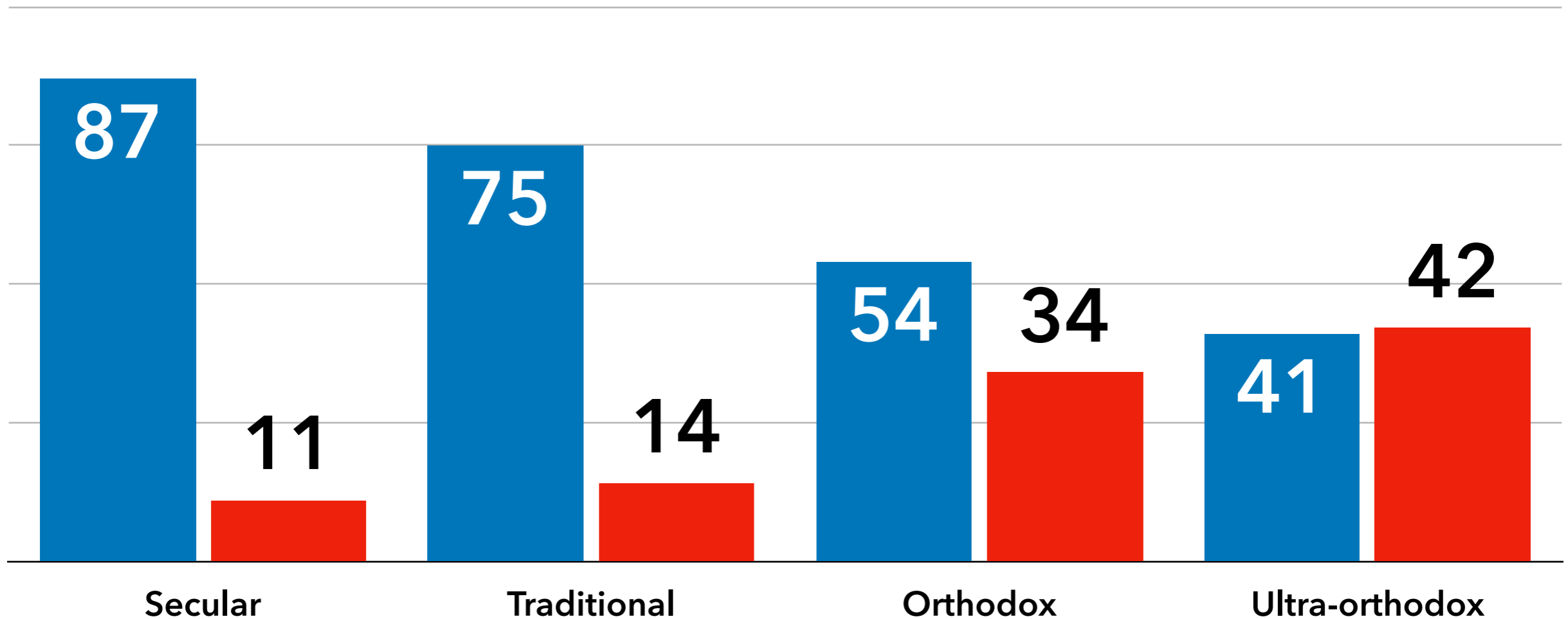


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The more secular an Israeli then the more likely they are to believe that support of the US for Israel is critical for Israel's future

Which of the following statements comes closest to your own views? (by religiosity)

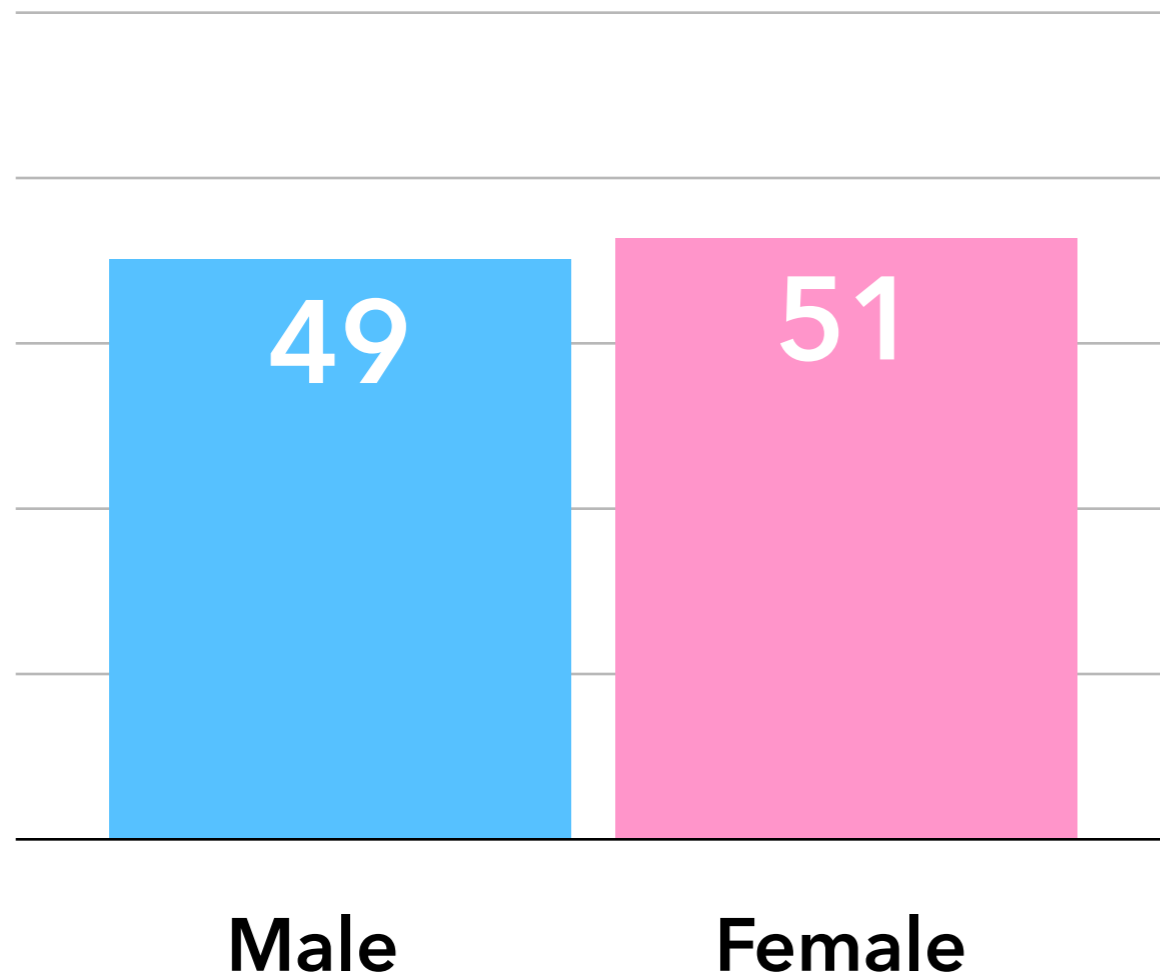
- The support of the United States for the State of Israel is critical for Israel's future.**
- The support of the United States for the State of Israel is not critical for Israel's future.**



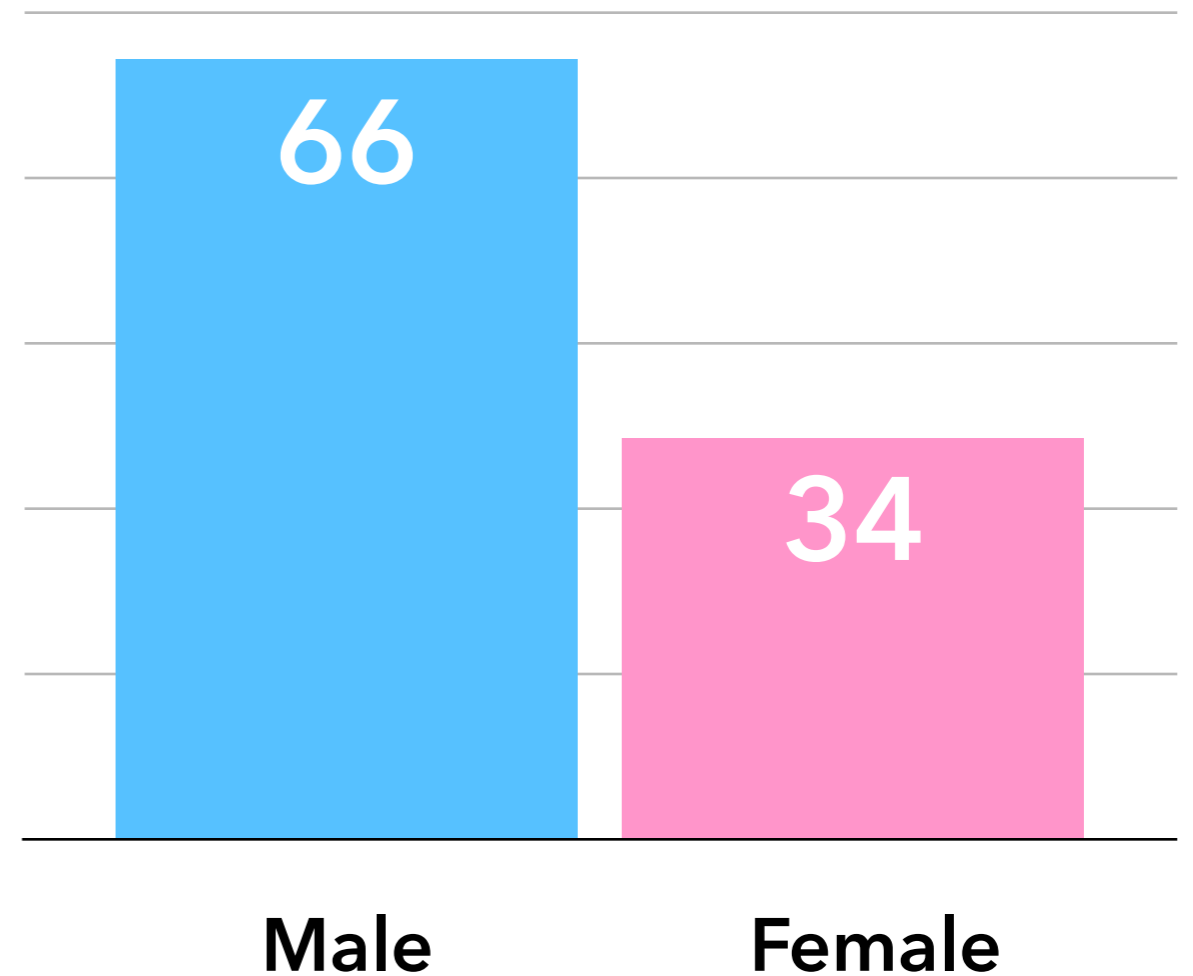
Israeli men drive the small group who think US support is not critical to Israel's future

Which of the following statements comes closest to your own views? (by gender)

The support of the United States for the State of Israel is critical for Israel's future.



The support of the United States for the State of Israel is not critical for Israel's future.

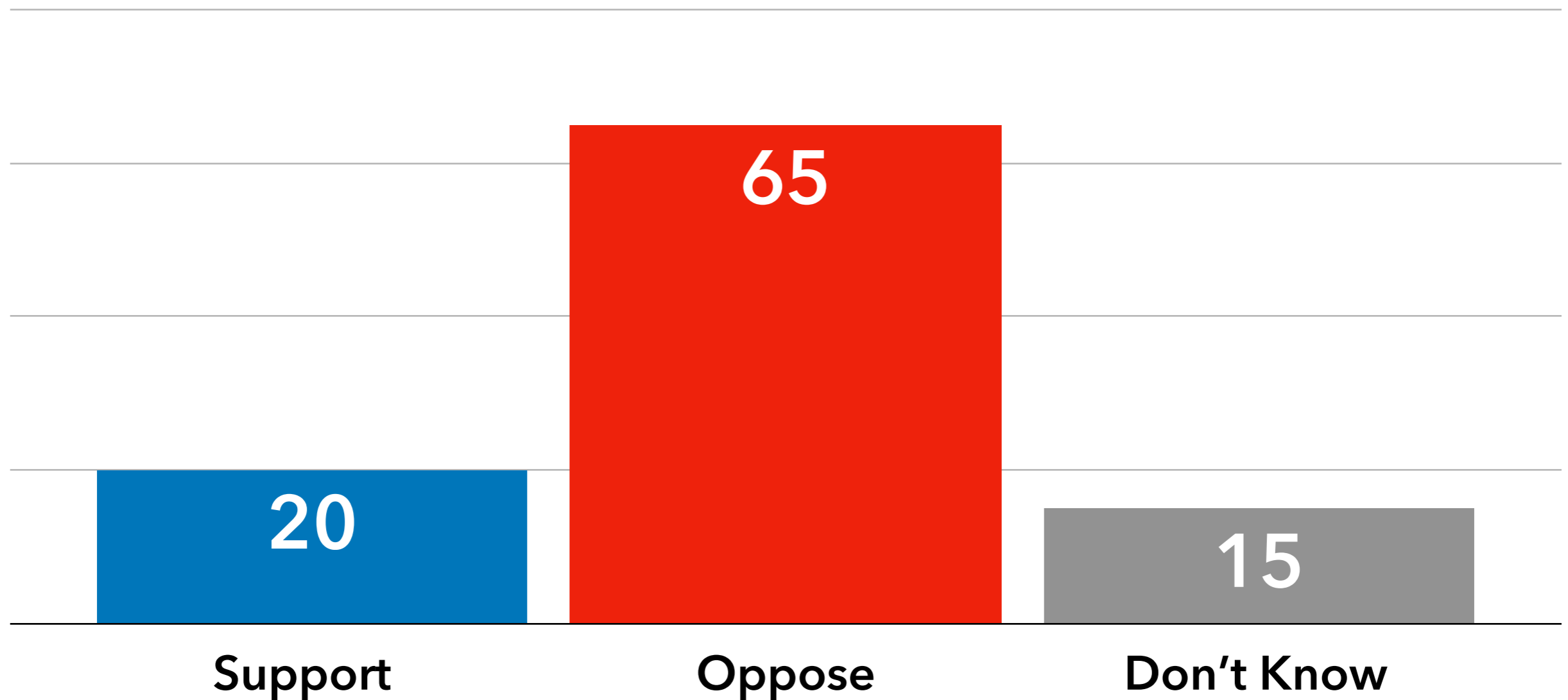


Two State Solution



Majority of Israeli voters oppose a 2 State Solution

Do you (ROTATE) support or oppose the two state solution - a Palestinian state next to the State of Israel - as the solution to the Israeli-Palestinian conflict? (RANDOMIZE)

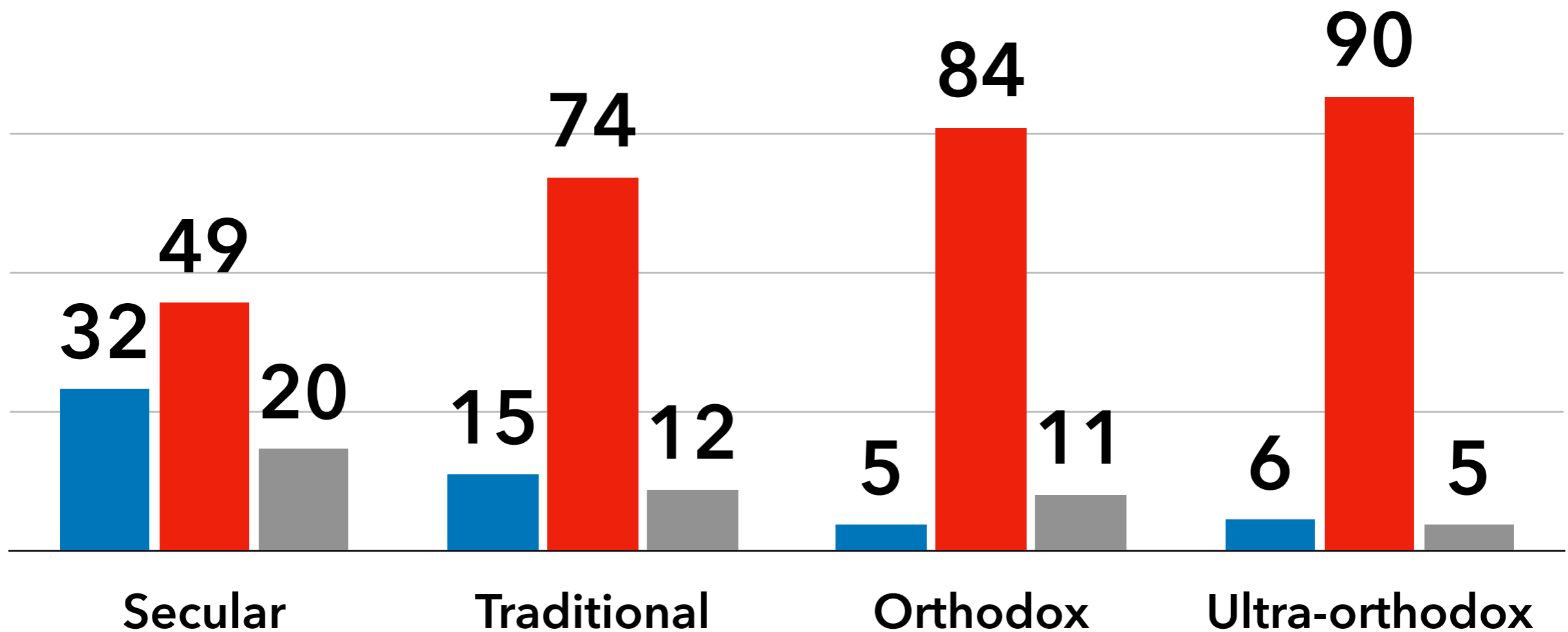


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More religious voters are more opposed to the 2 State Solution

Do you (ROTATE) support or oppose the two state solution - a Palestinian state next to the State of Israel - as the solution to the Israeli-Palestinian conflict? (by religiosity)

■ Support the 2 State Solution ■ Oppose the 2 State Solution ■ Don't Know

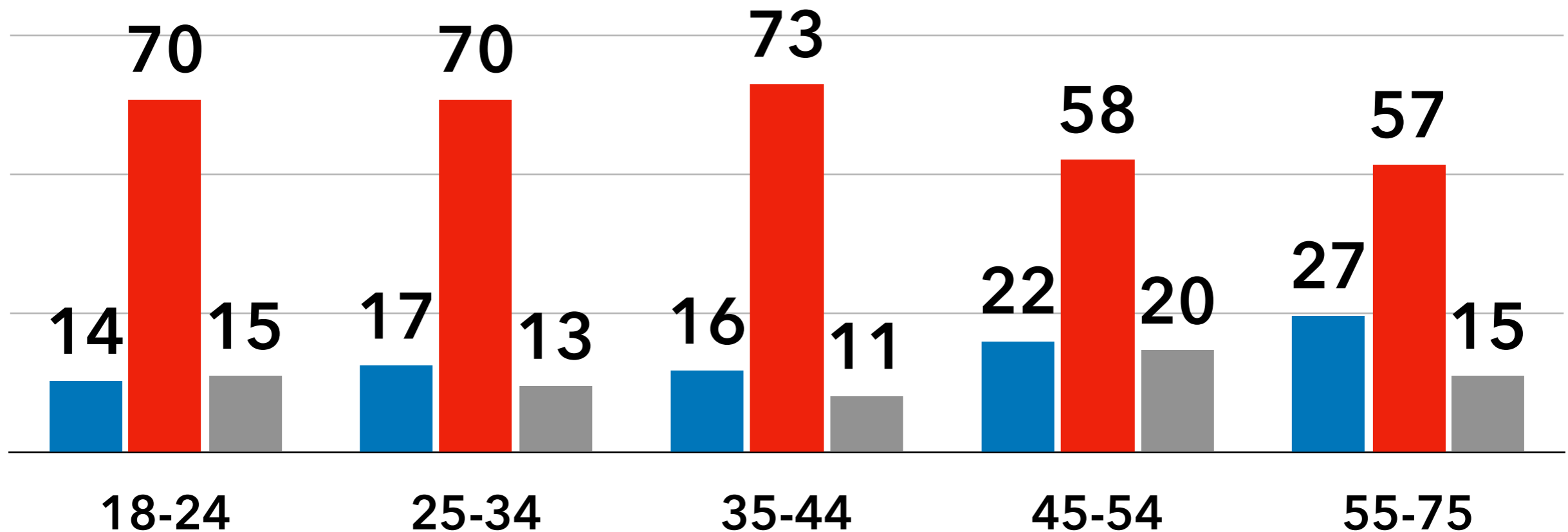


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Support for 2 State Solution increases with age

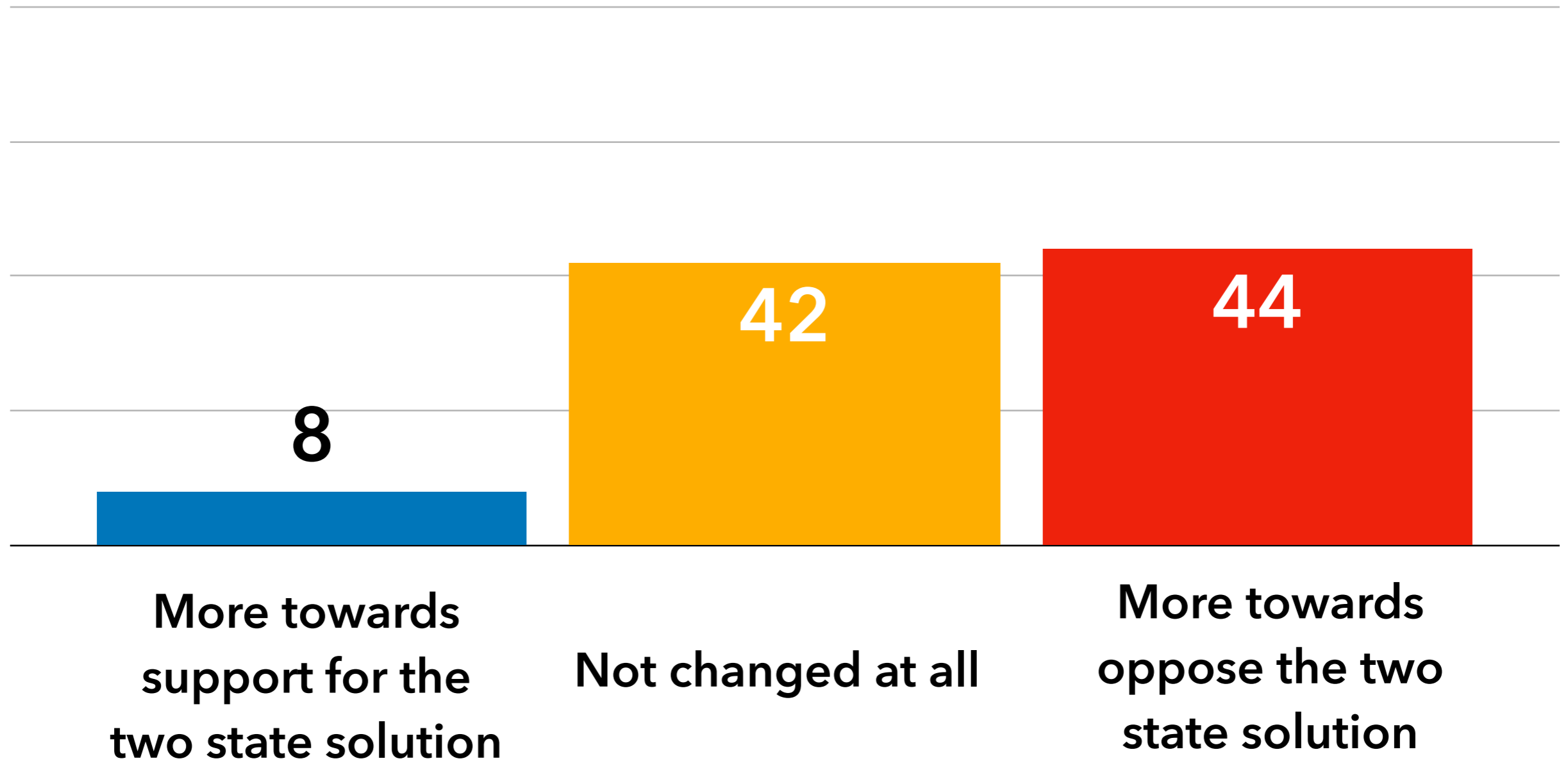
Do you (ROTATE) support or oppose the two state solution - a Palestinian state next to the State of Israel - as the solution to the Israeli-Palestinian conflict? (by age)

■ Support the 2 State Solution ■ Oppose the 2 State Solution ■ Don't Know



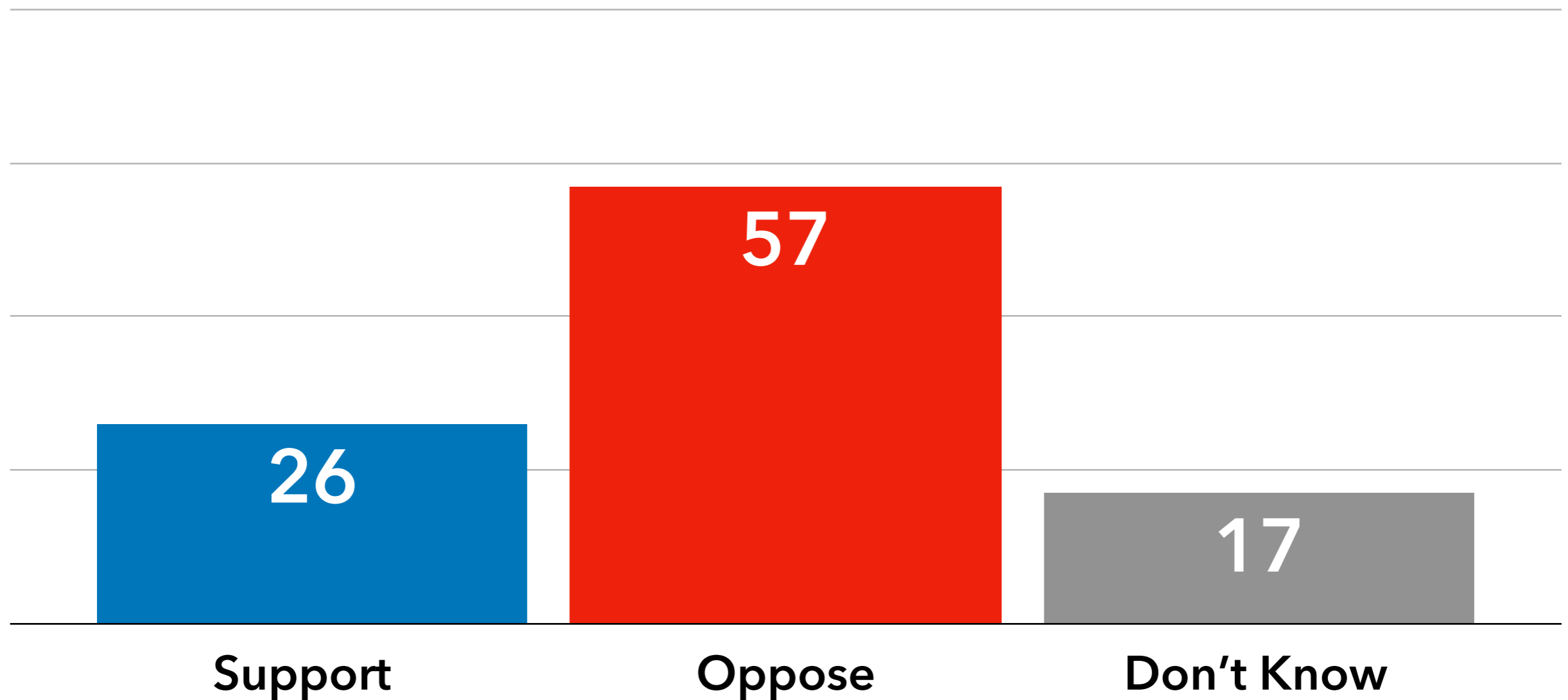
October 7 pushed nearly half of Israelis to oppose the 2 State Solution

Since October 7, would you say your opinion about the two state solution has changed:
(ROTATE TOP TO BOTTOM, BOTTOM TO TOP)



In a hypothetical situation where Hamas in Gaza is eradicated, support for the 2 State Solution increases only from 20% to 26%

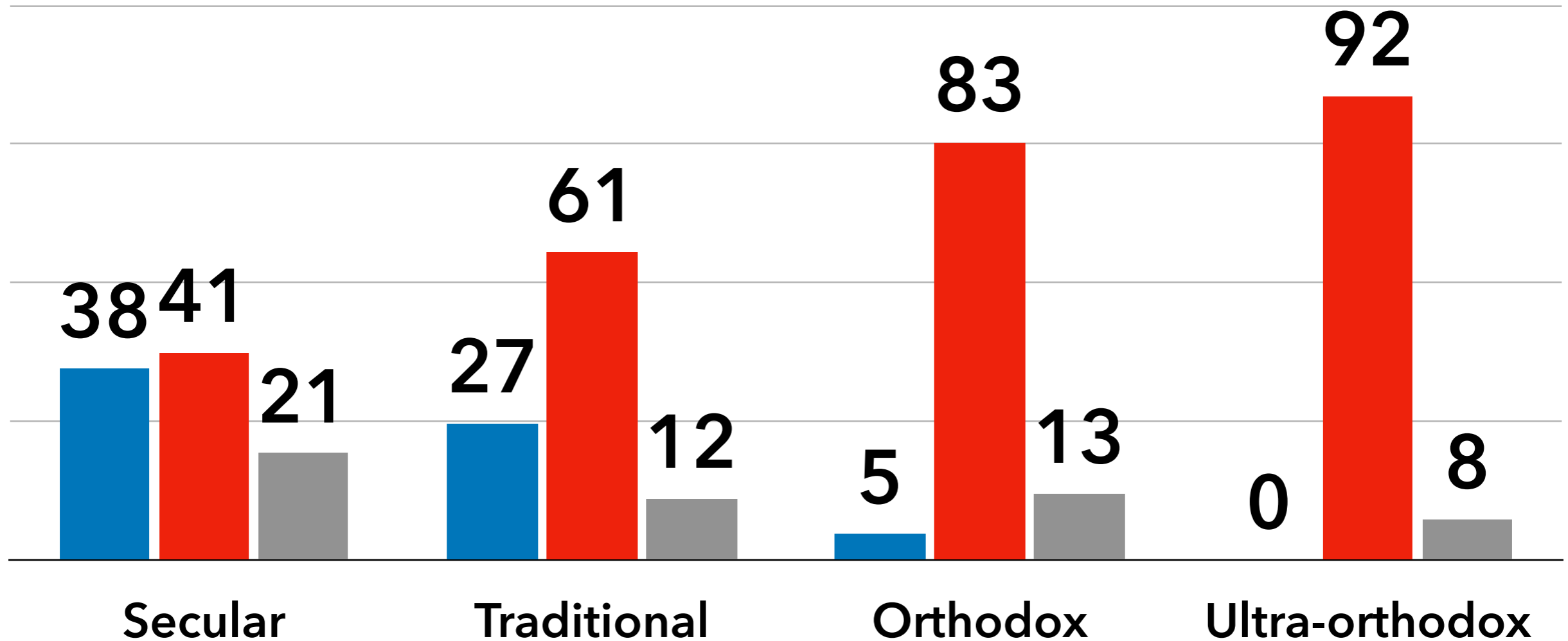
And if Israel will succeed in completely eradicating Hamas in Gaza, would you (ROTATE) support or oppose a two state solution? (RANDOMIZE)



More religious voters are more opposed to the 2 State Solution, even after hypothetical elimination of Hamas

And if Israel will succeed in completely eradicating Hamas in Gaza, would you (ROTATE) support or oppose a two state solution? (by religiosity)

■ Support the 2 State Solution ■ Oppose the 2 State Solution ■ Don't Know



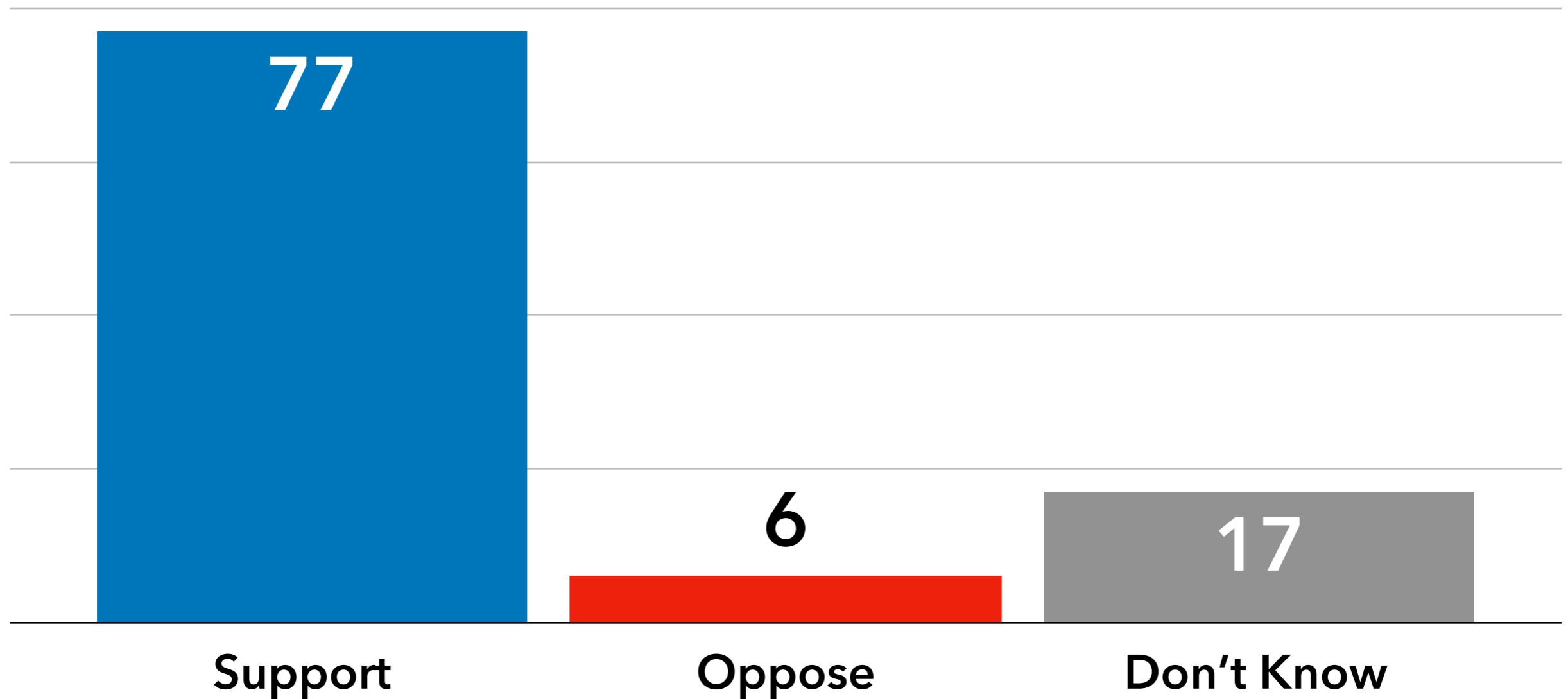
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Abraham Accords



Abraham Accords wildly popular amongst Israeli voters

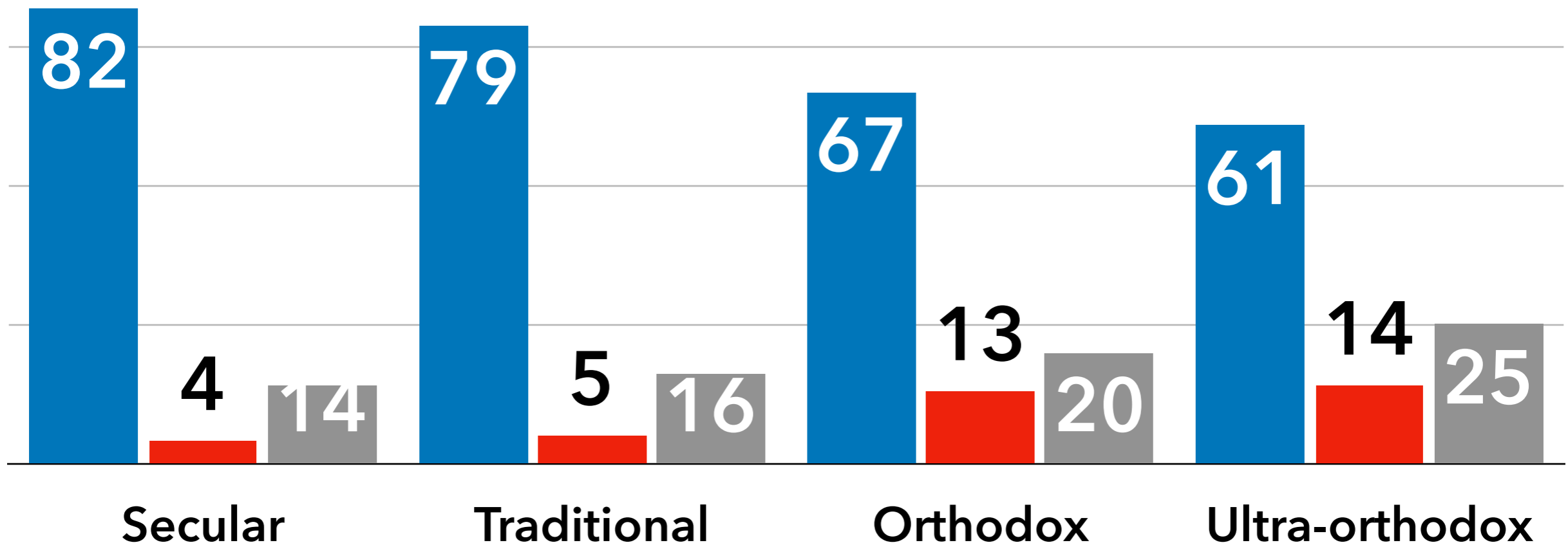
Do you (ROTATE) support or oppose the diplomatic agreements between Israel and the UAE, Bahrain, Sudan, and Morocco - the agreements known as the Abraham Accords? (ROTATE)



Majority of all levels of religiosity support the Abraham Accords

Do you (ROTATE) support or oppose the diplomatic agreements between Israel and the UAE, Bahrain, Sudan, and Morocco - the agreements known as the Abraham Accords? (by religiosity)

■ Support ■ Oppose ■ Don't Know

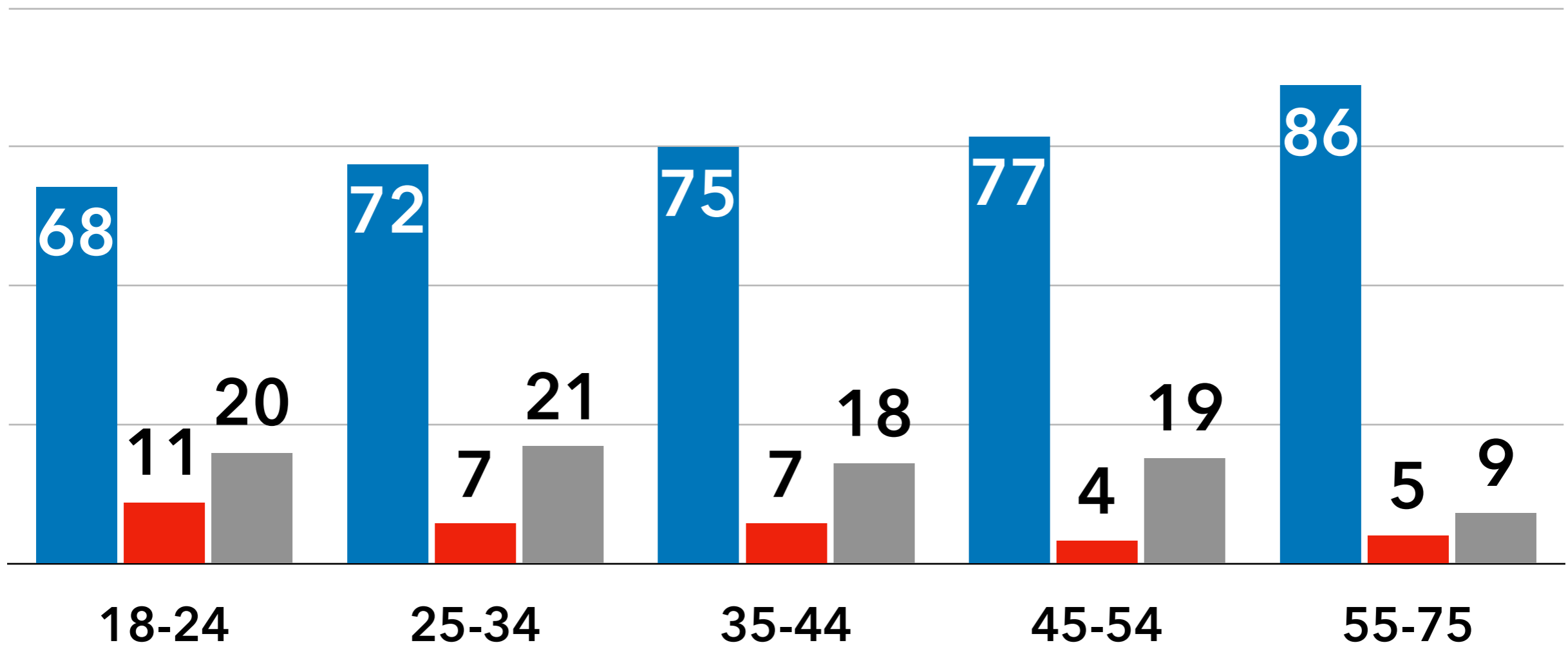


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Majority of all age groups support the Abraham Accords, with Israelis 55+ giving strongest support

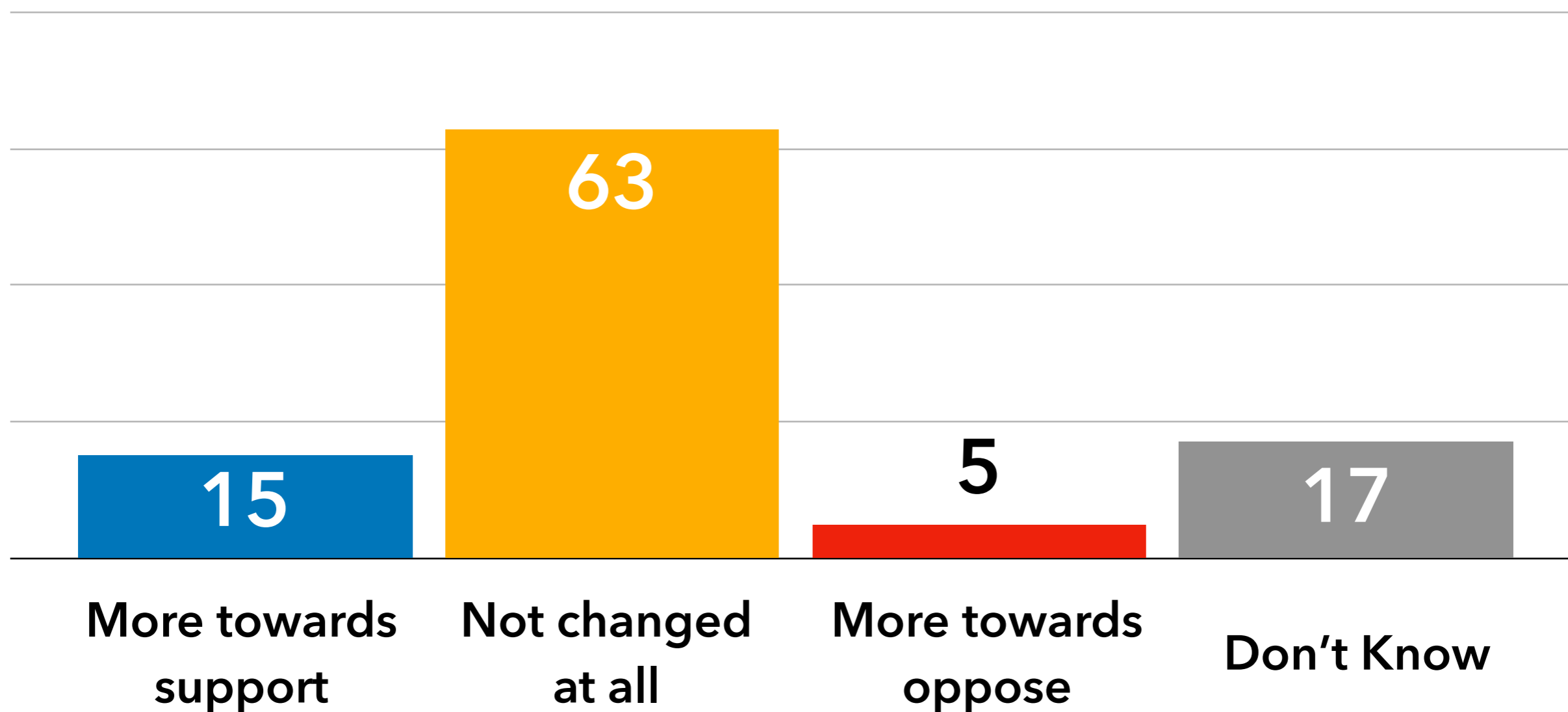
Do you (ROTATE) support or oppose the diplomatic agreements between Israel and the UAE, Bahrain, Sudan, and Morocco - the agreements known as the Abraham Accords? (by age)

Support Oppose Don't Know



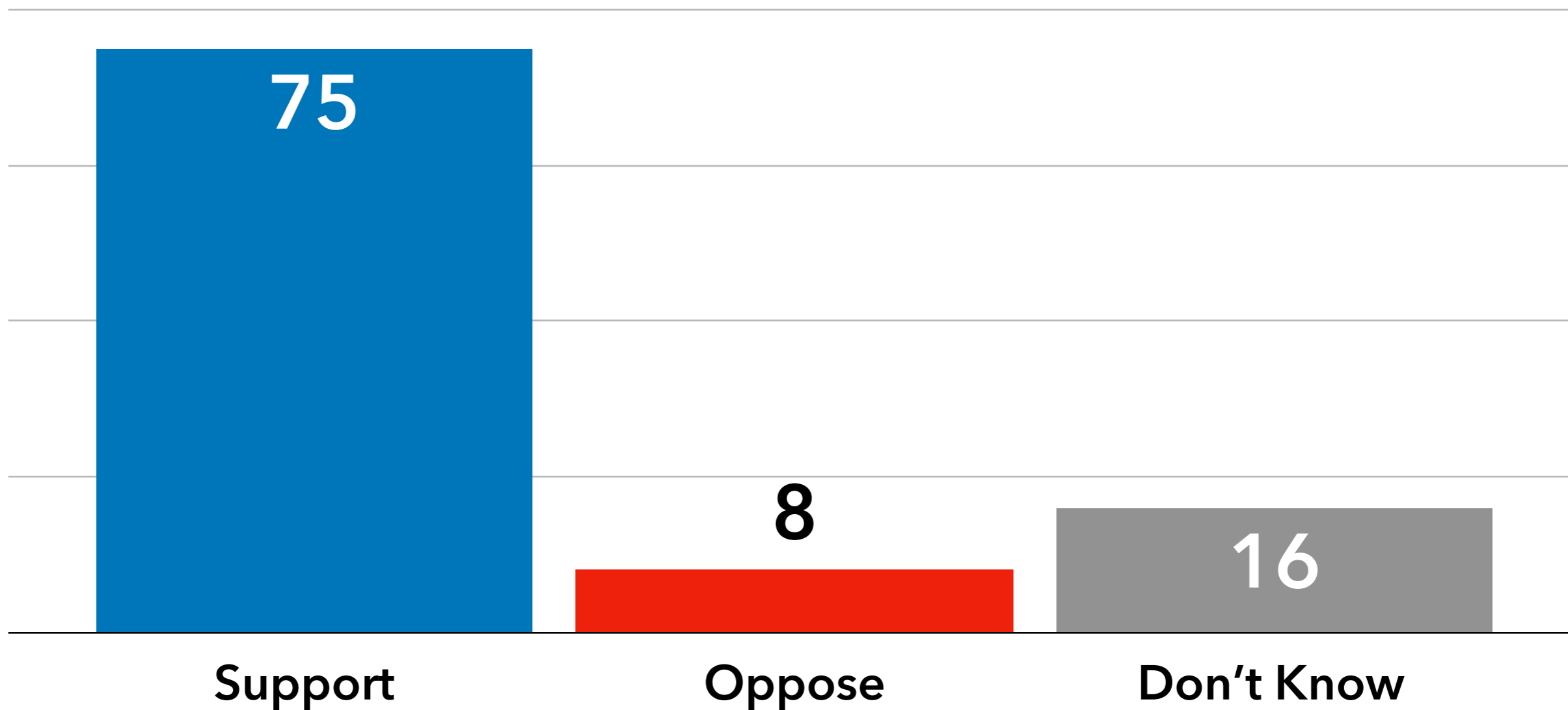
October 7 has had minimal, if slightly positive, impact on support for the Abraham Accords amongst Israeli voters

Since October 7, would you say your opinion of the Abraham Accords has changed:
(ROTATE TOP TO BOTTOM, BOTTOM TO TOP)



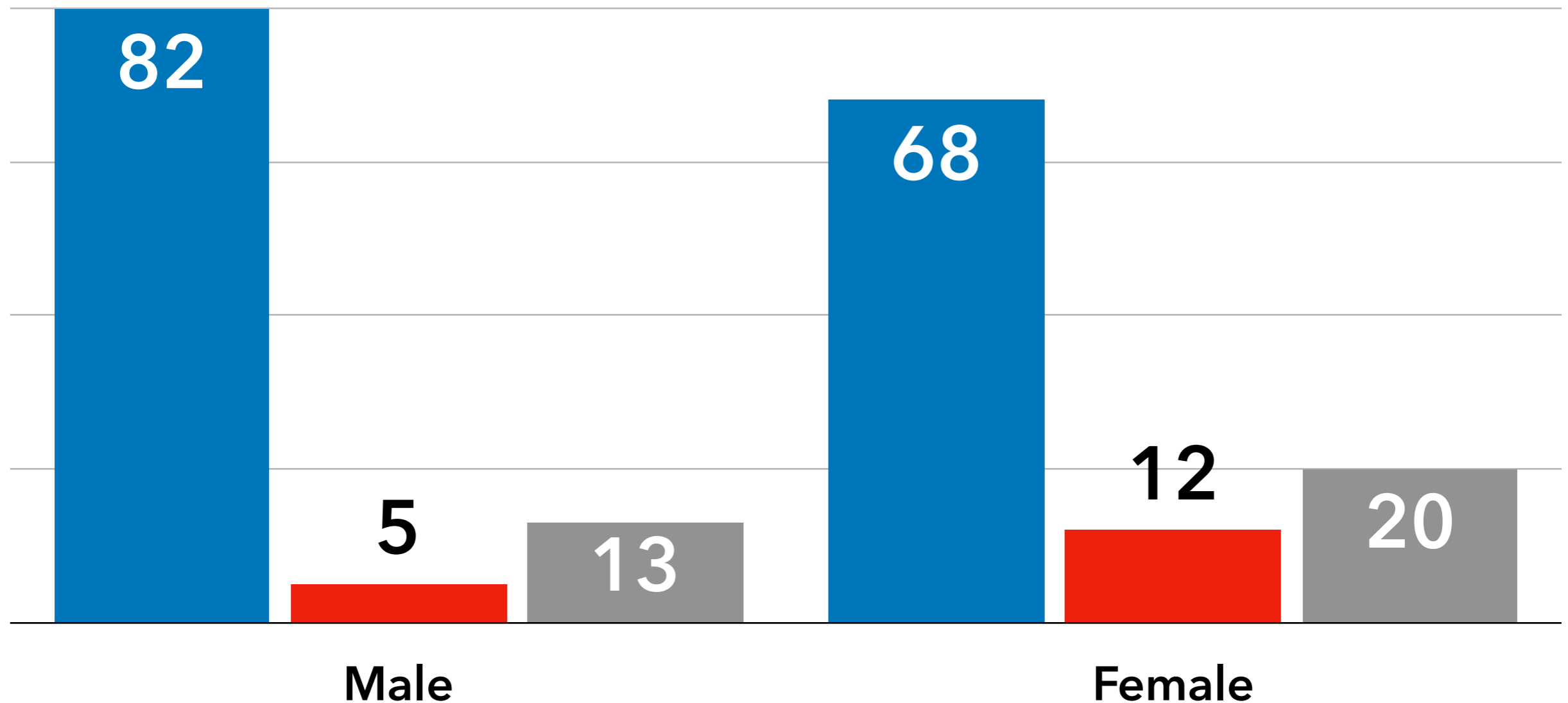
Potential Israel-Saudi deal also wildly popular amongst Israel voters

*Do you support or oppose a future diplomatic agreement between Israel and Saudi Arabia?
(ROTATE)*



Gender gap in support for Israel-Saudi agreement

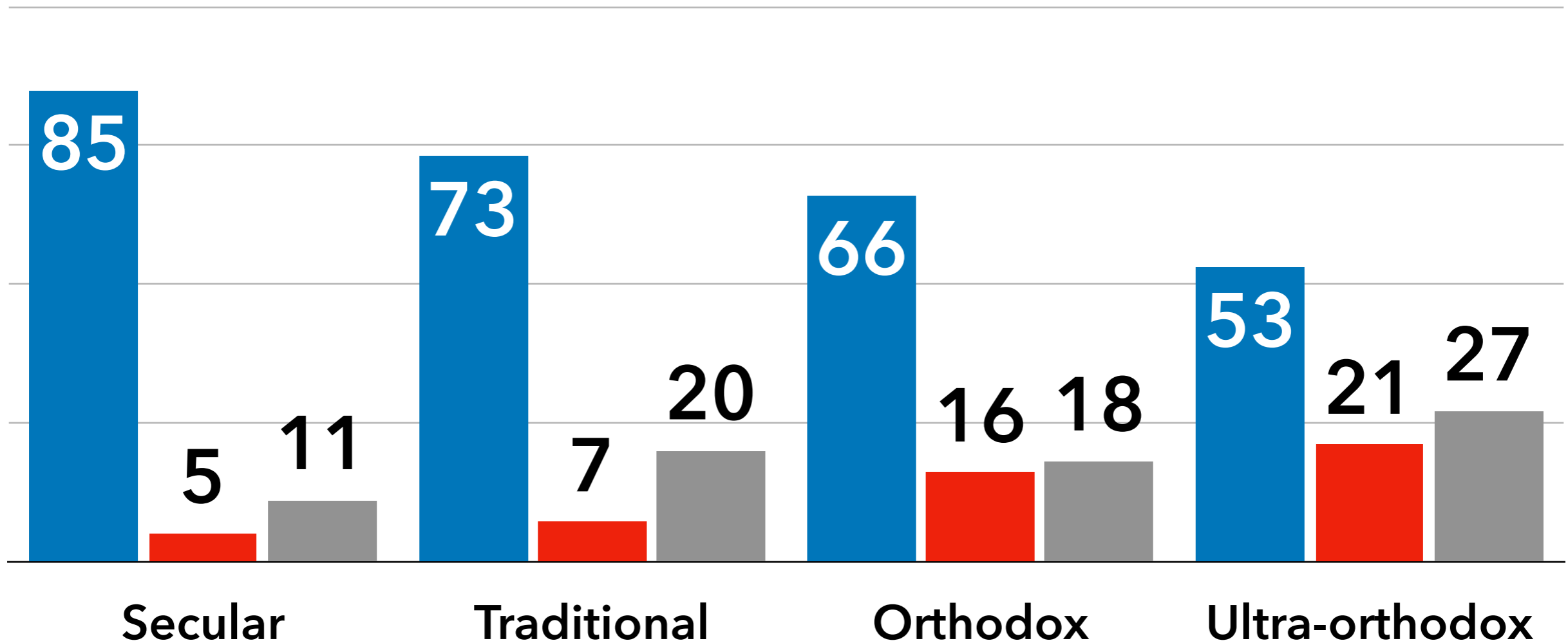
Do you support or oppose a future diplomatic agreement between Israel and Saudi Arabia? (by age)



Majority of all levels of religiosity support an Israel-Saudi Arabia agreement, with a strong support of 85% among secular Israelis

Do you support or oppose a future diplomatic agreement between Israel and Saudi Arabia? (by religiosity)

■ Support ■ Oppose ■ Don't Know

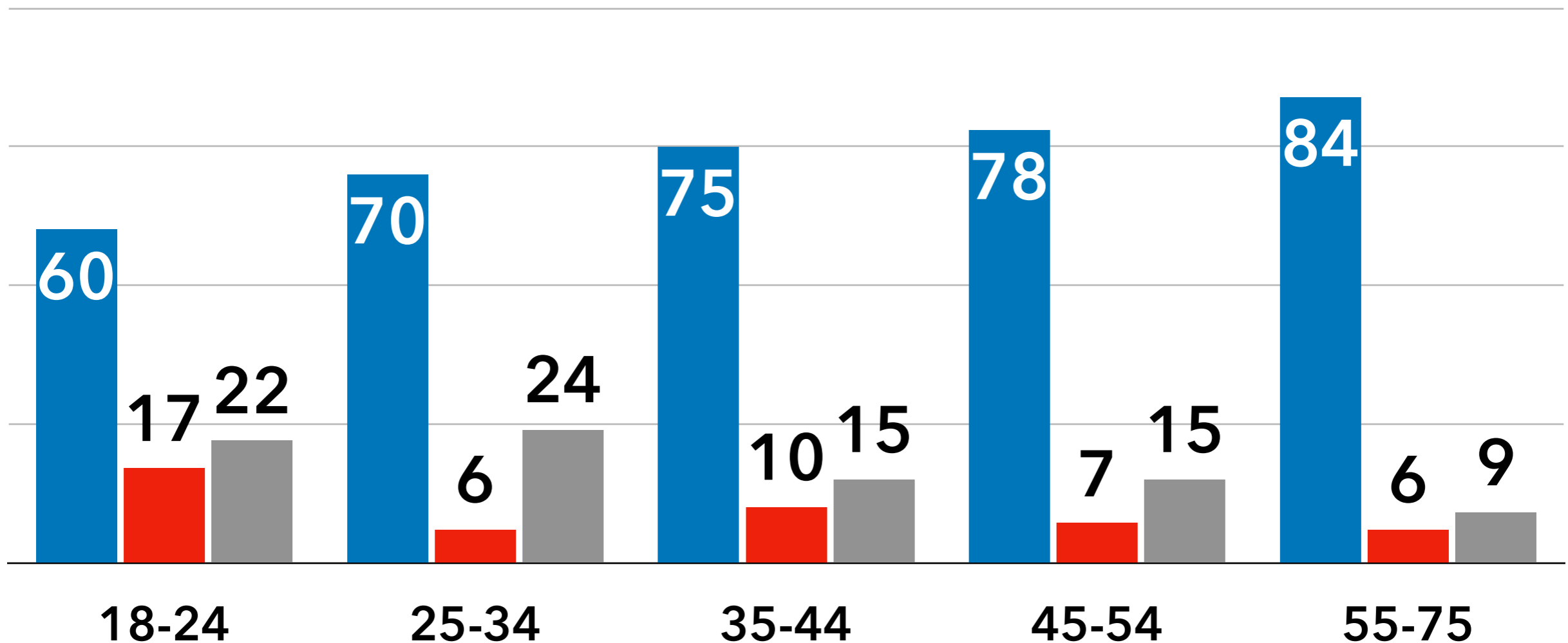


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Majority of all age groups support an Israel-Saudi agreement, with support strongest amongst older Israelis

Do you support or oppose a future diplomatic agreement between Israel and Saudi Arabia? (by age)

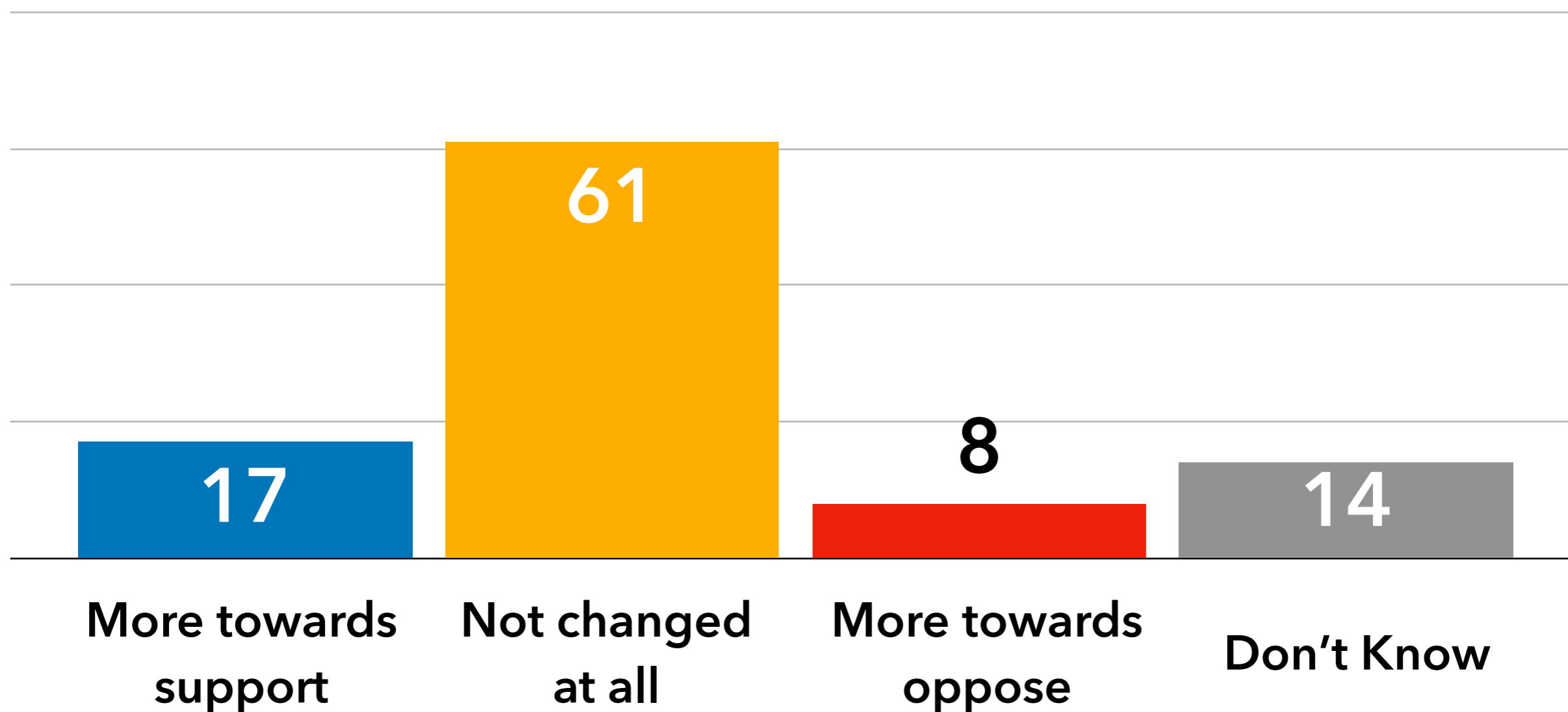
■ Support ■ Oppose ■ Don't Know



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October 7 has had minimal, if slightly positive, impact on support for potential Israel-Saudi deal amongst Israelis

*Since October 7, has your opinion of a future diplomatic agreement with Saudi Arabia changed:
(ROTATE TOP TO BOTTOM, BOTTOM TO TOP)*

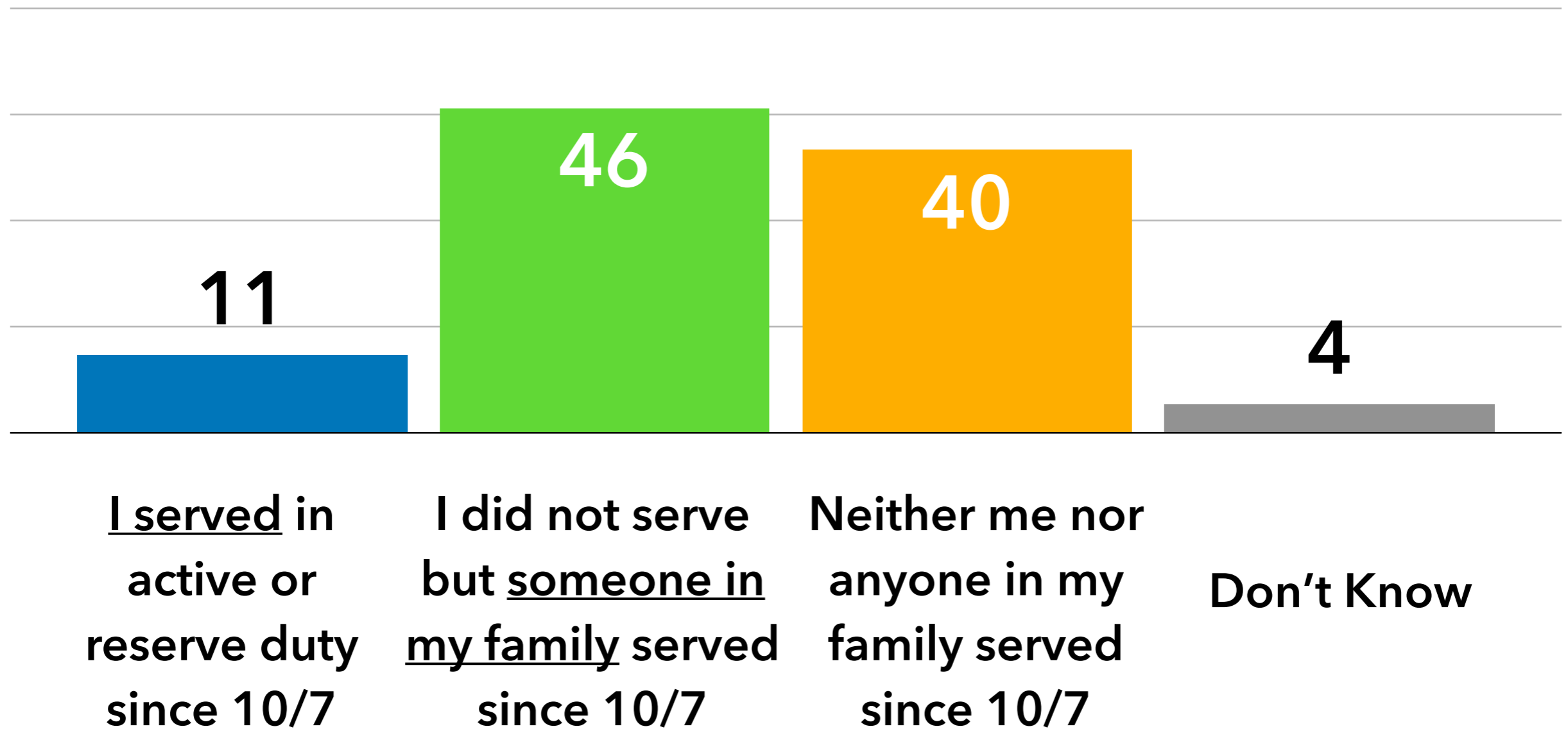


Israel-Hamas War



57% of Israeli voters say they or someone in their family served in active or reserve duty since October 7

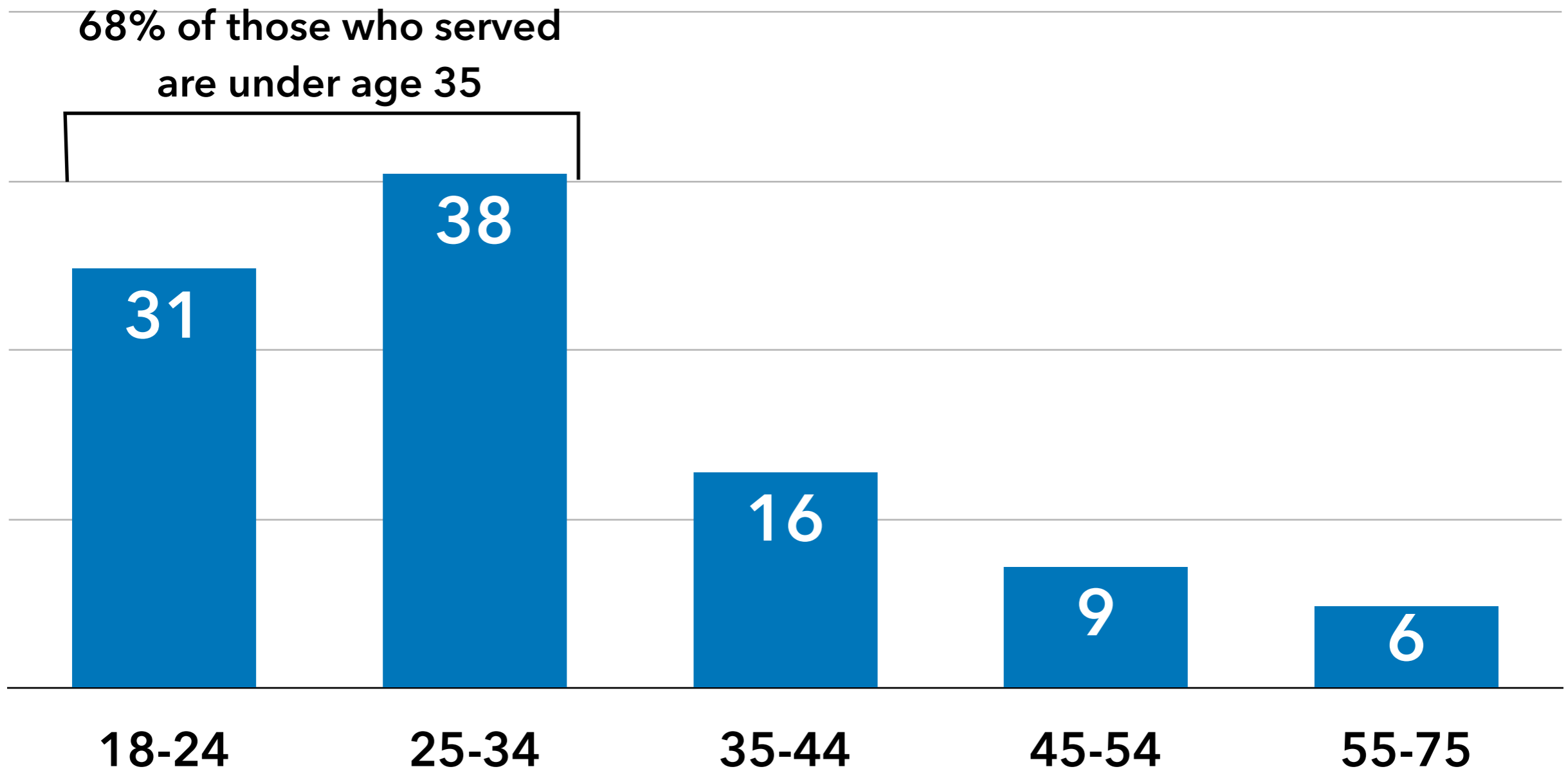
Have you or someone in your family served in active duty or reserve duty since October 7?



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Breakdown of age groups of Israelis who served since October 7

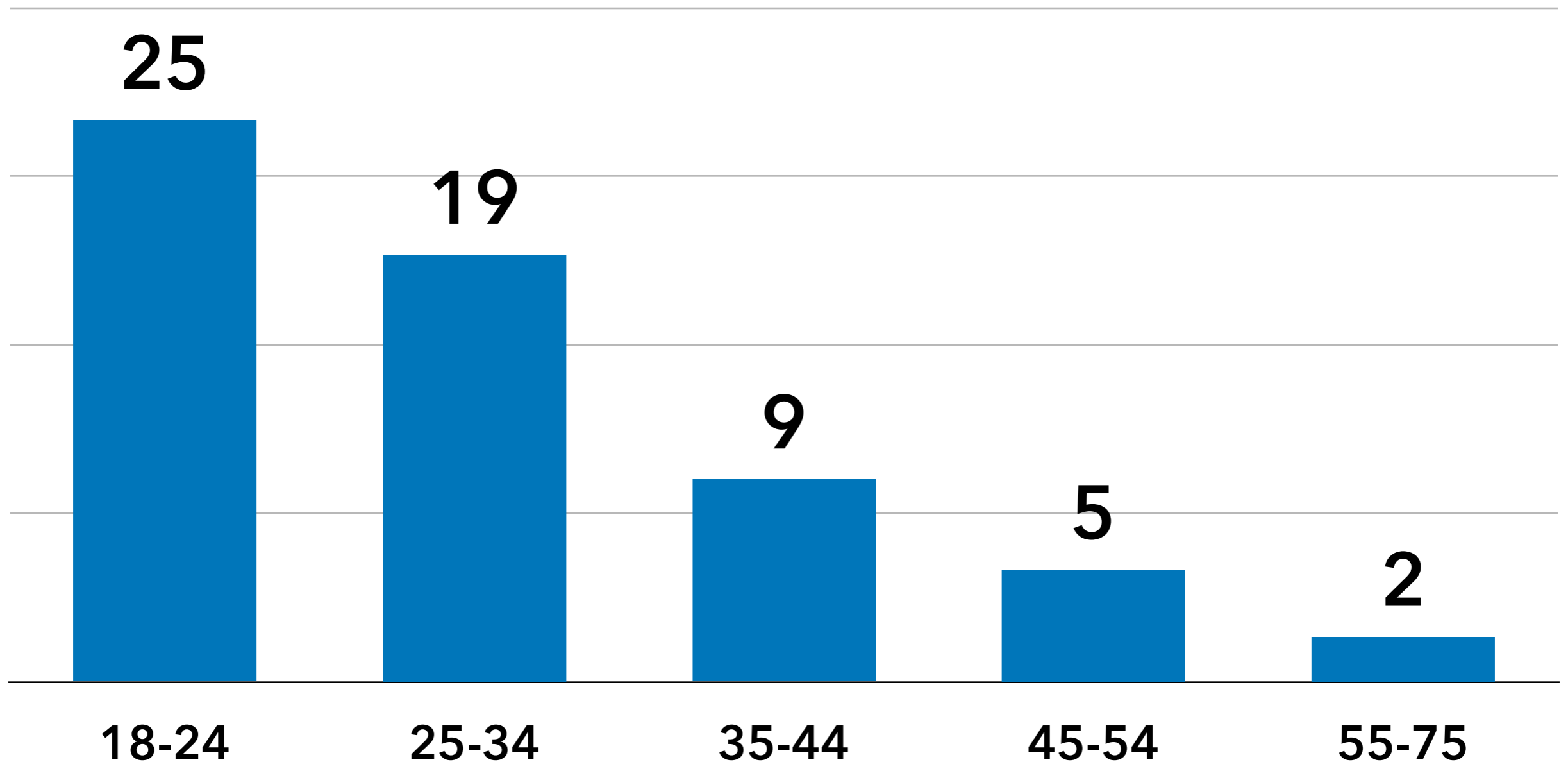
Have you or someone in your family served in active duty or reserve duty since October 7? (by age, I served ONLY)



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Percent within an age group that served since October 7 1/4 18-24 year olds, 1/5 25-34 year olds

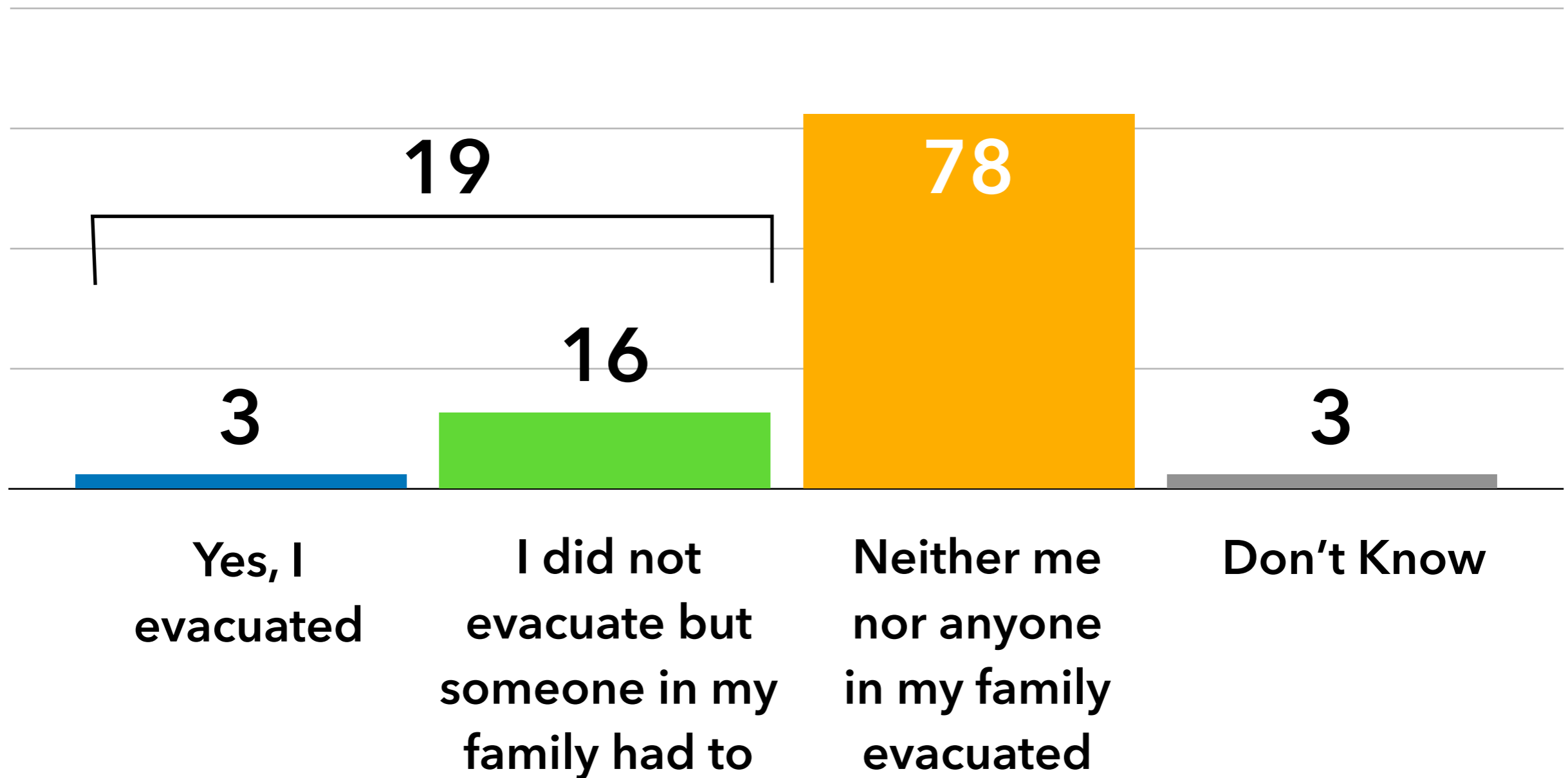
Have you or someone in your family served in active duty or reserve duty since October 7? (by age, I served ONLY)



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19% of Israeli voters say they or someone in their family evacuated their home since October 7

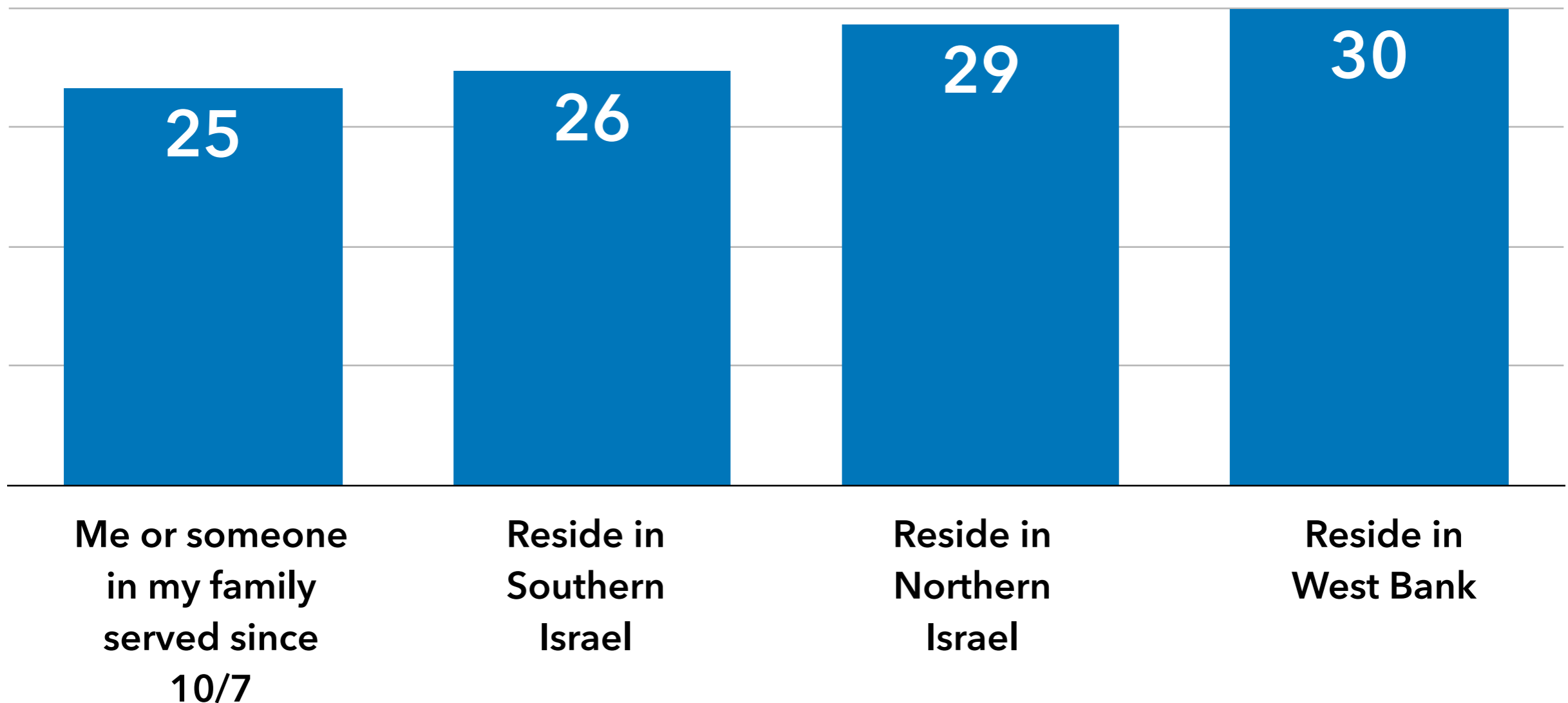
Have you or someone in your family been forced to evacuate your home since October 7?



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Groups with highest percent of Israelis who they or someone in their family evacuated their home since October 7

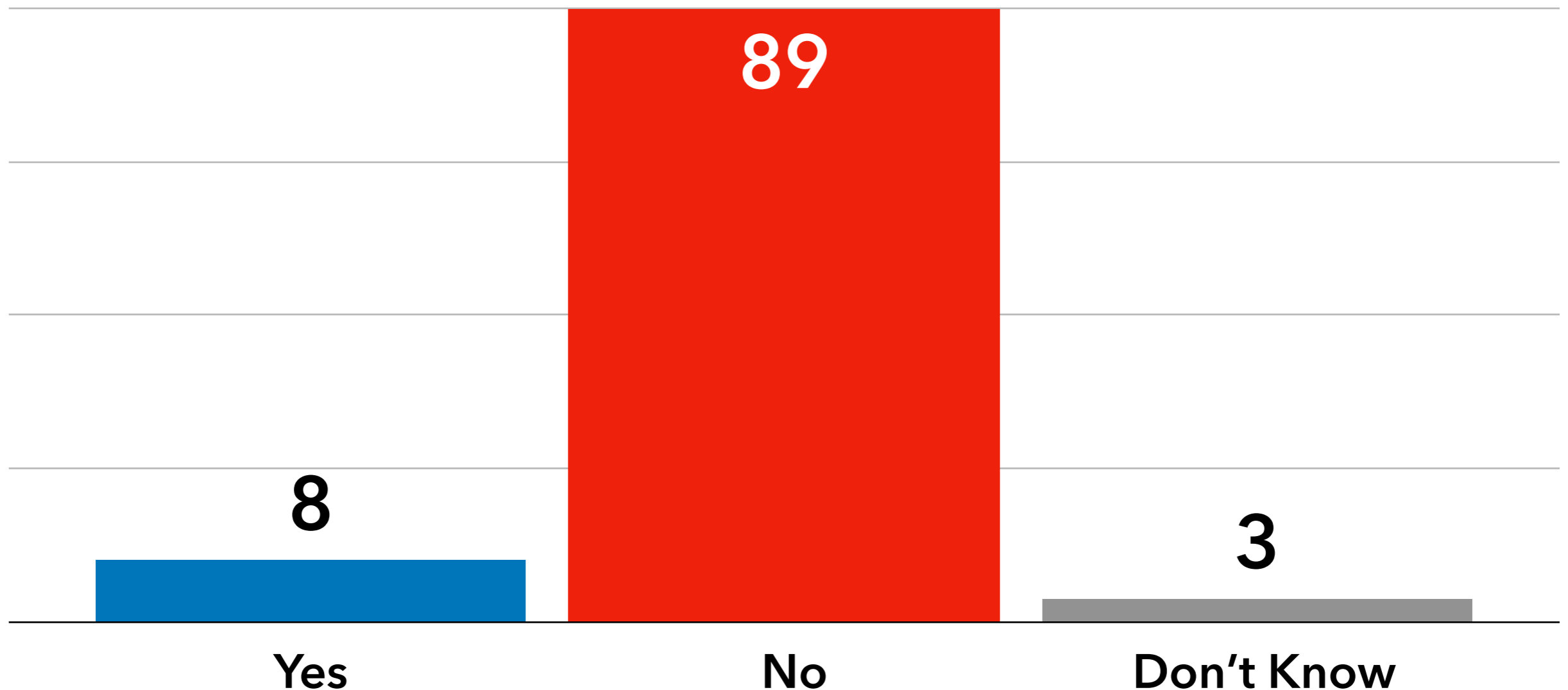
Have you or someone in your family been forced to evacuate your home since October 7? (by target groups, answering I evacuated and someone in my family evacuated, combined ONLY)



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8% of likely voters say they or someone in their family was injured, killed or kidnapped since October 7

Have you or someone in your family been injured, killed or taken hostage on October 7, in security service since October 7, or as a result of terror since October 7?



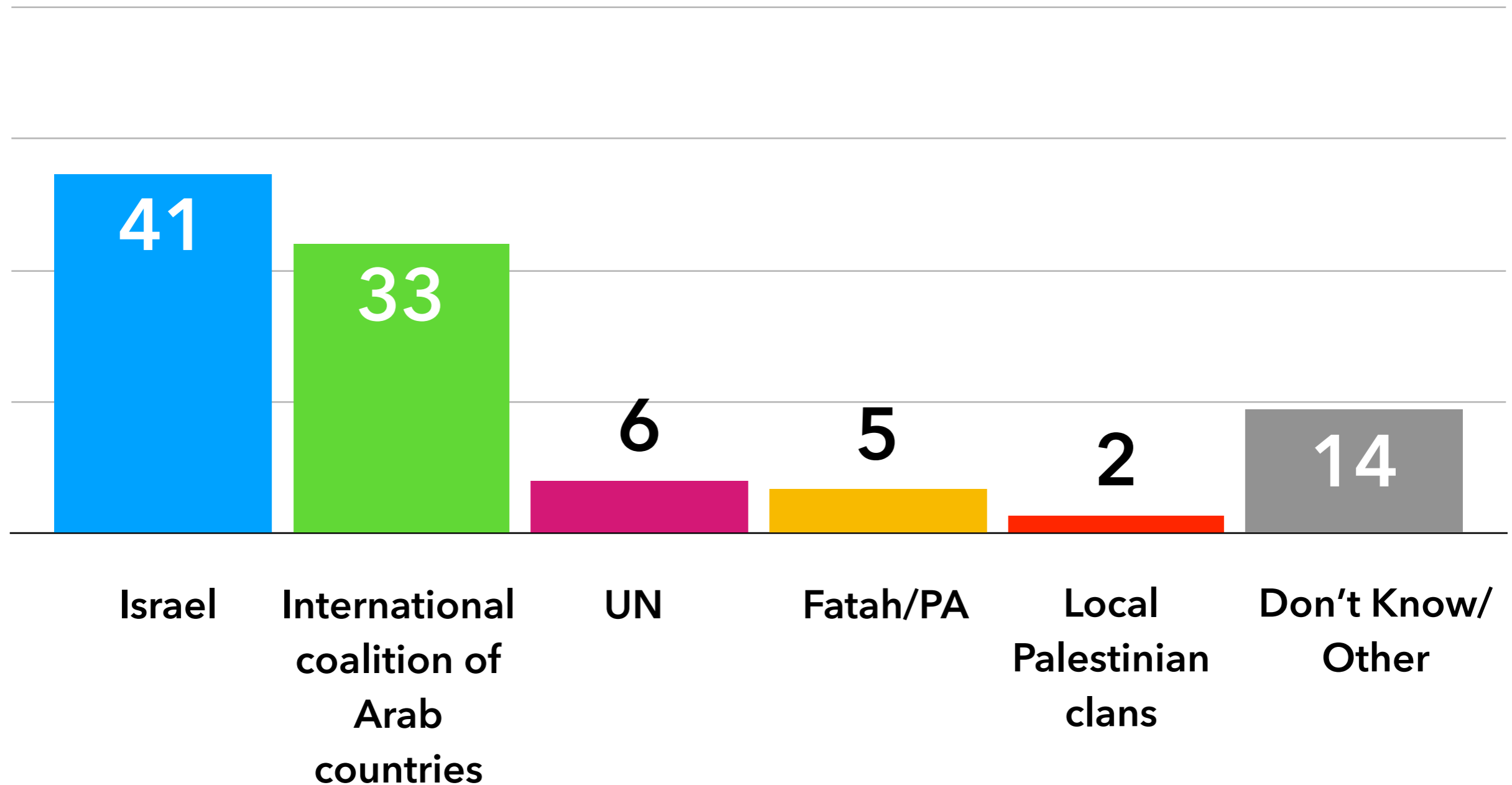
**Respondents who answered yes were delivered this message: We share in your sorry if someone was killed and we are holding your hand and praying together with you if someone was injured or kidnapped!*



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Israelis want to see Israel or an international coalition that includes Arab countries govern Gaza in coming years

Thinking about the future of Gaza, who do you think should govern Gaza in the coming years?
(RANDOMIZE)

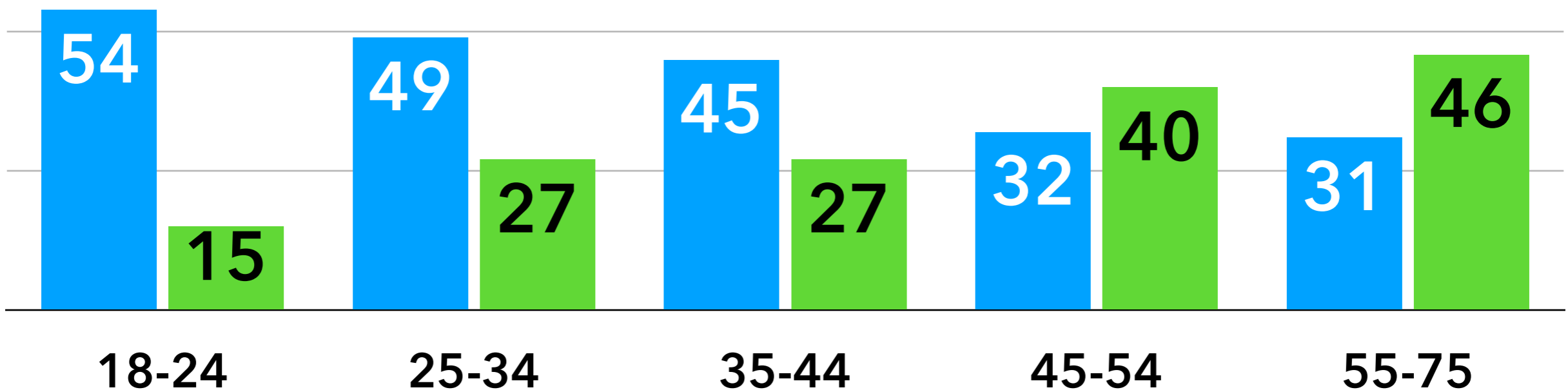


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Support for future Israeli control over Gaza driven by younger Israelis

Thinking about the future of Gaza, who do you think should govern Gaza in the coming years? (by age, answering Israel and coalition with Arab countries ONLY)

■ Israel ■ International coalition of Arab countries

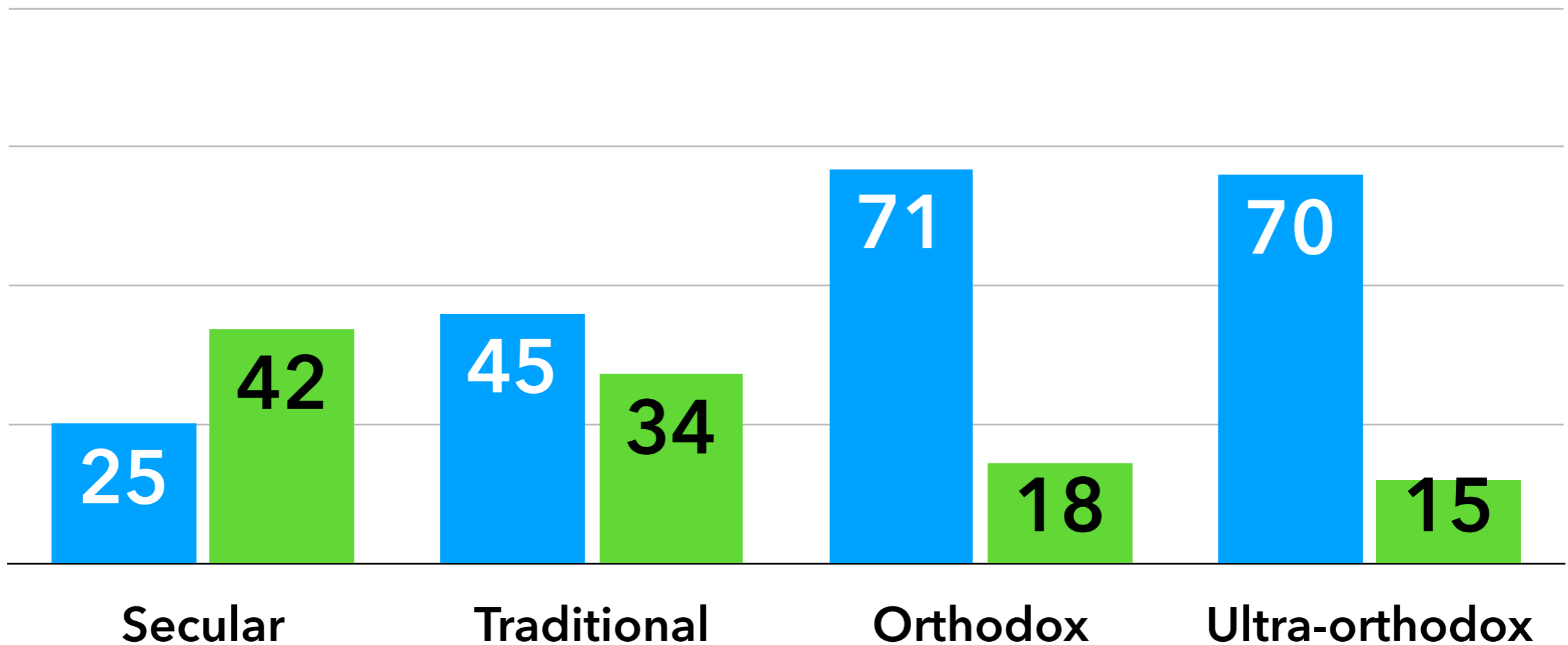


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Support for future Israeli control over Gaza driven by more religious Israelis

Thinking about the future of Gaza, who do you think should govern Gaza in the coming years? (by religiosity, answering Israel and coalition with Arab countries ONLY)

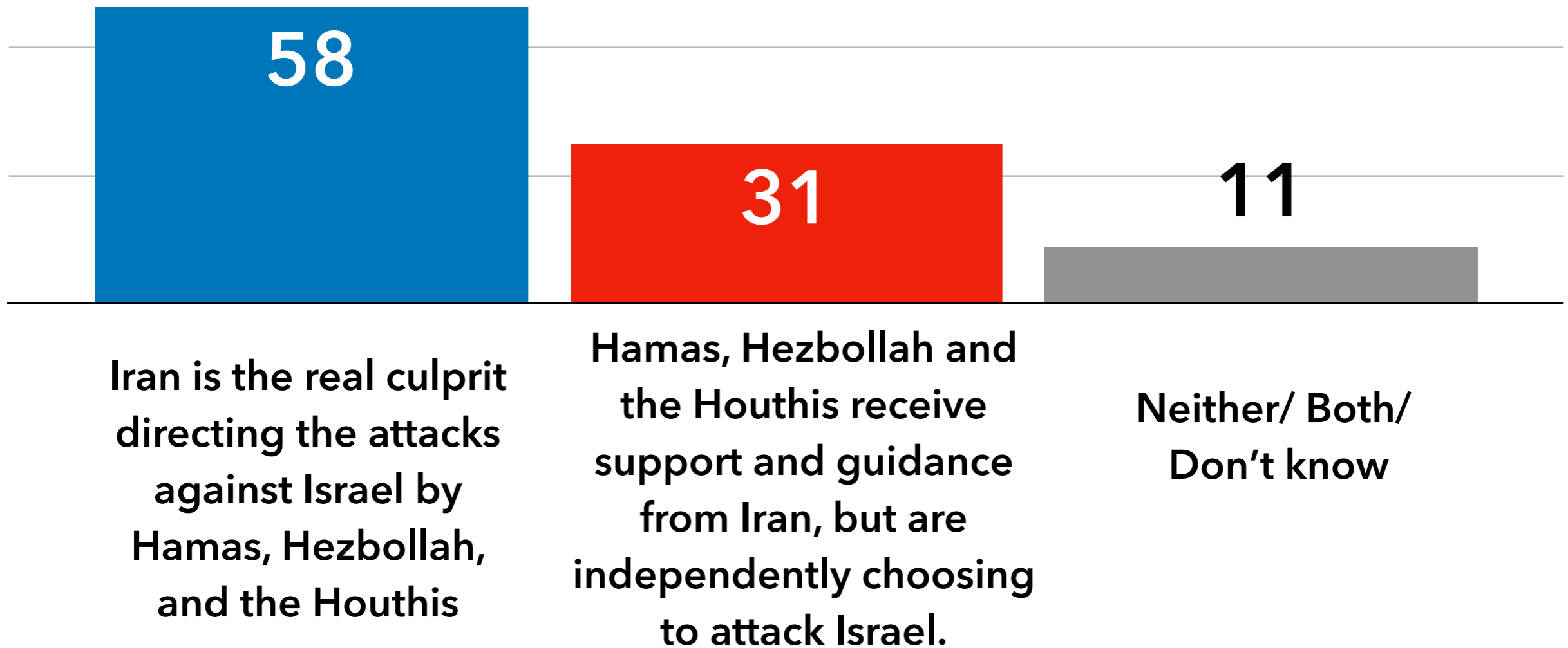
■ Israel ■ International coalition of Arab countries



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Majority of Israelis see Iran as the real culprit directing attacks from Hamas, Hezbollah and the Houthis

Which of the following two statements comes closest to your view? (ROTATE)



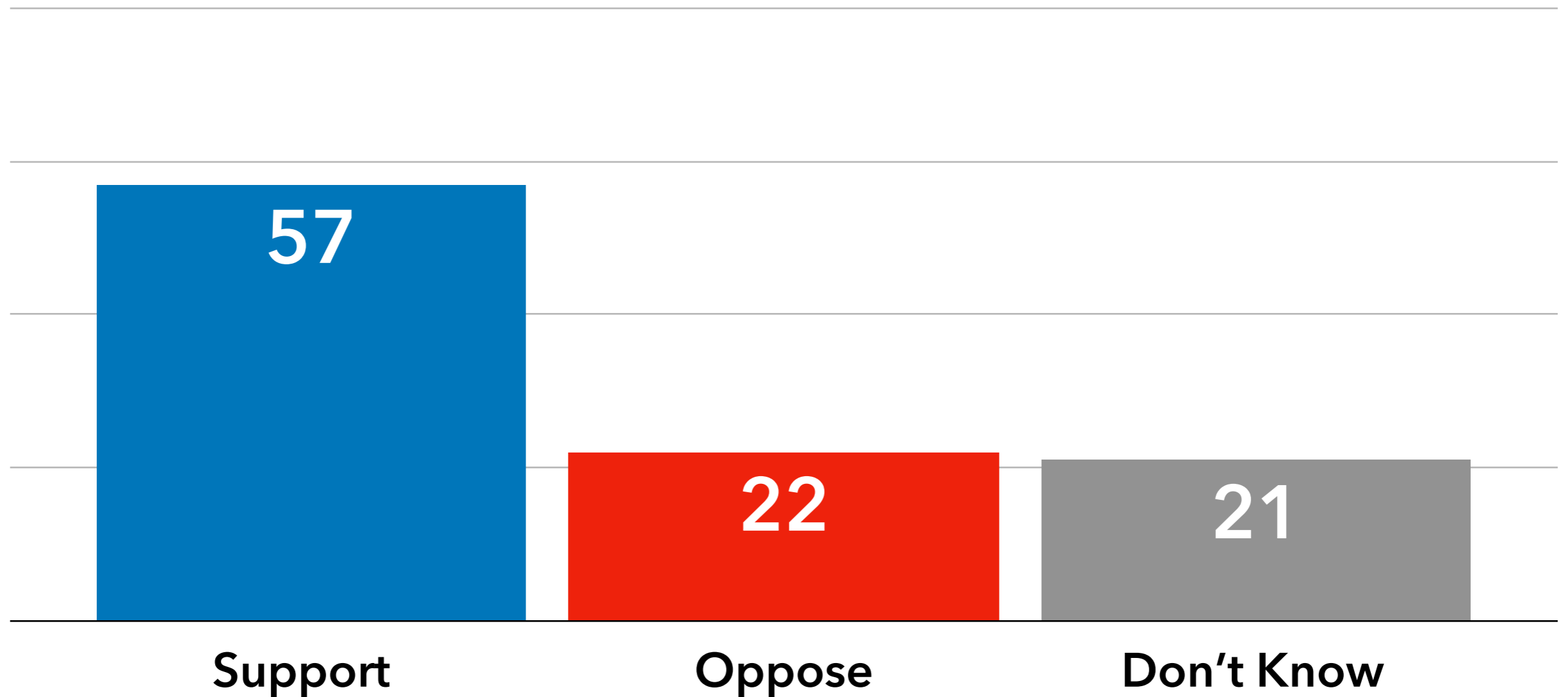
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Israel's Northern Border



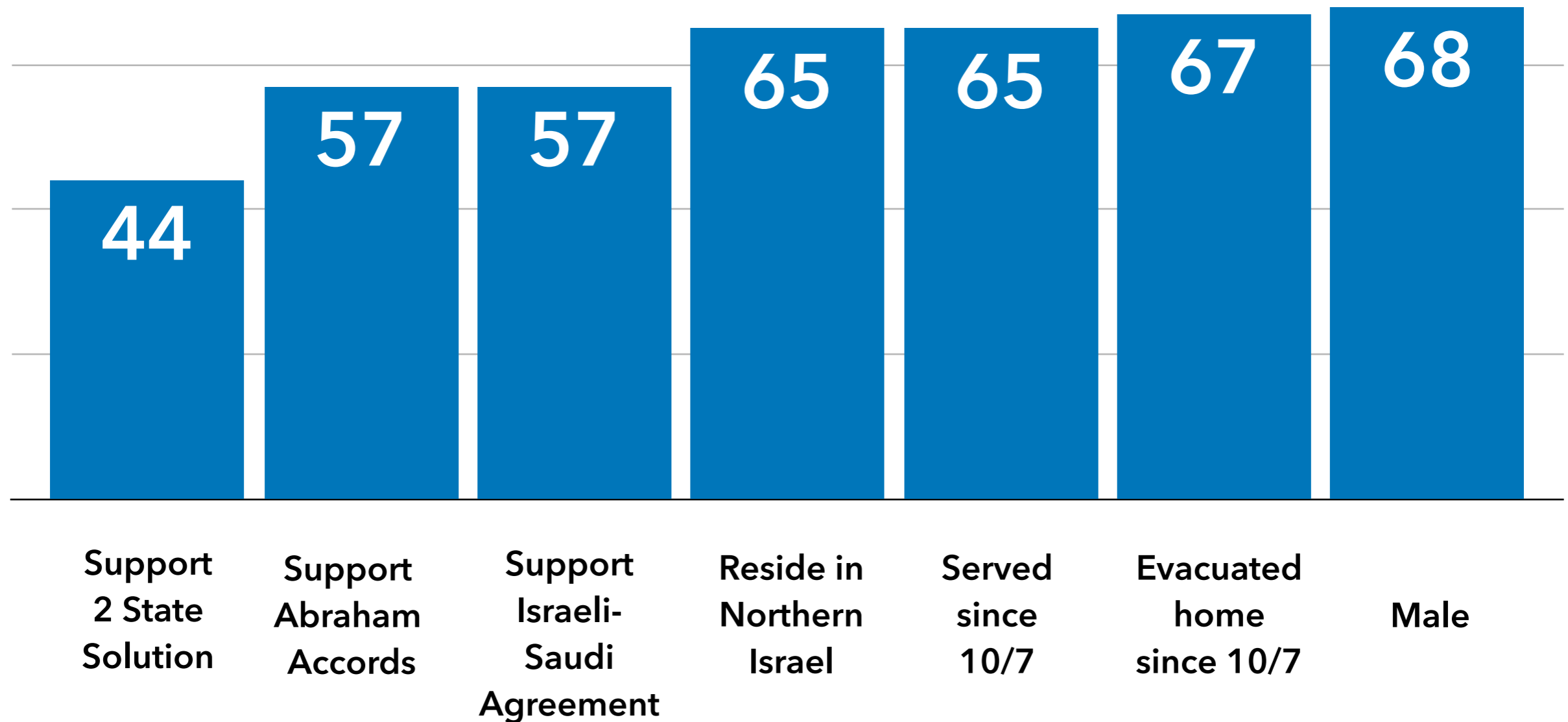
Majority of Israelis support escalation of IDF activity in north & ground invasion by IDF of Lebanon

Thinking about the northern border, do you support or oppose a significant escalation of IDF activity against Hezbollah, including a ground invasion of Lebanon? (ROTATE)



Support for military escalation in the North from key groups of Israelis

Thinking about the northern border, do you support or oppose a significant escalation of IDF activity against Hezbollah, including a ground invasion of Lebanon? (by target group, answer support ONLY)



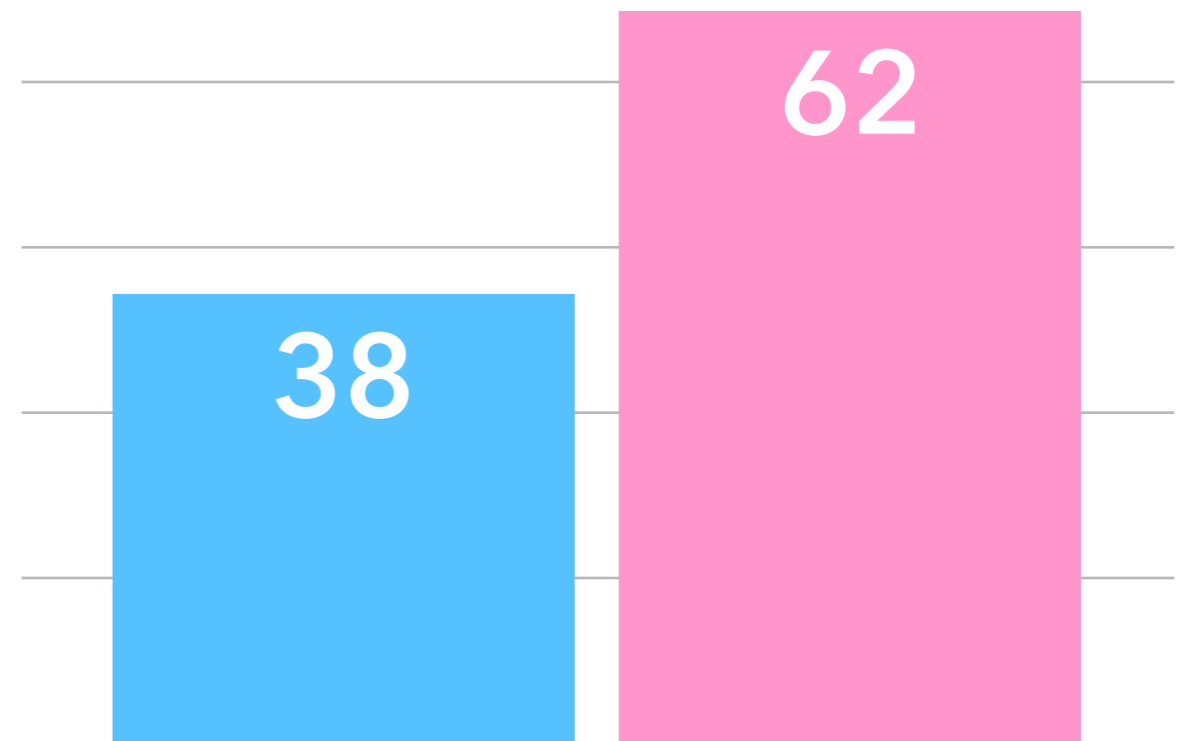
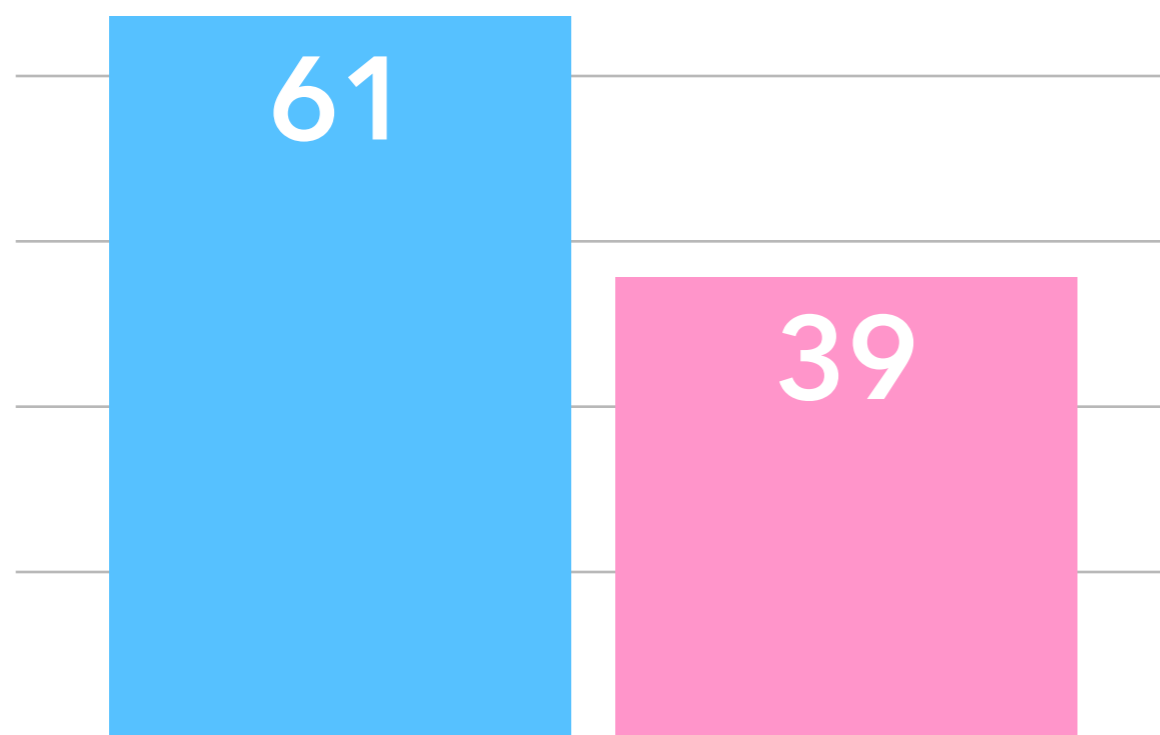
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Gender divide in support for significant military escalation in north

Thinking about the northern border, do you support or oppose a significant escalation of IDF activity against Hezbollah, including a ground invasion of Lebanon? (by gender)

Support escalation of IDF activity in the north, including a ground invasion

Oppose escalation of IDF activity in the north, including a ground invasion



Male

Female

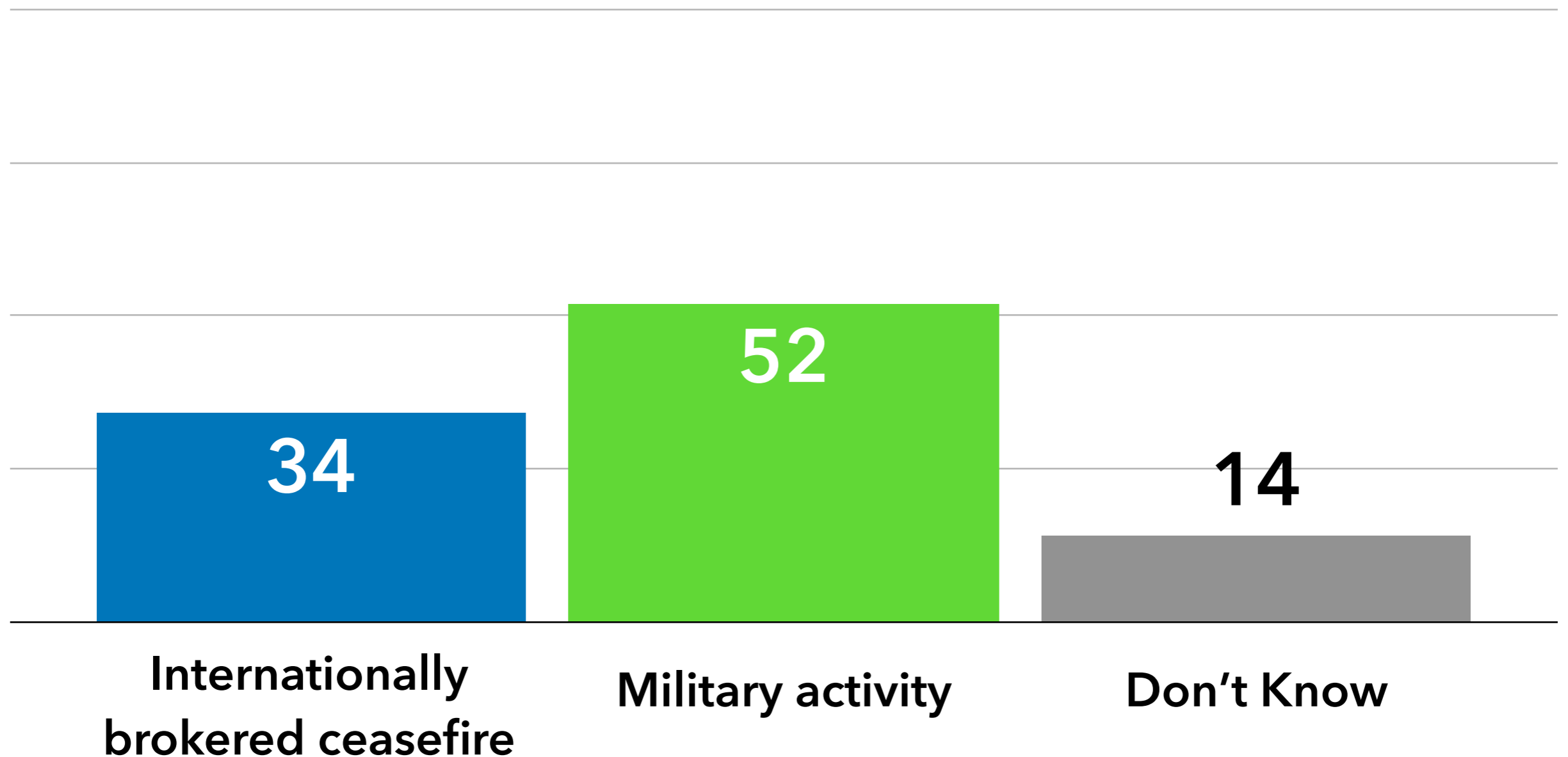
Male

Female



Most Israelis believe it's better to reduce the threat from Hezbollah through military activity, not a ceasefire

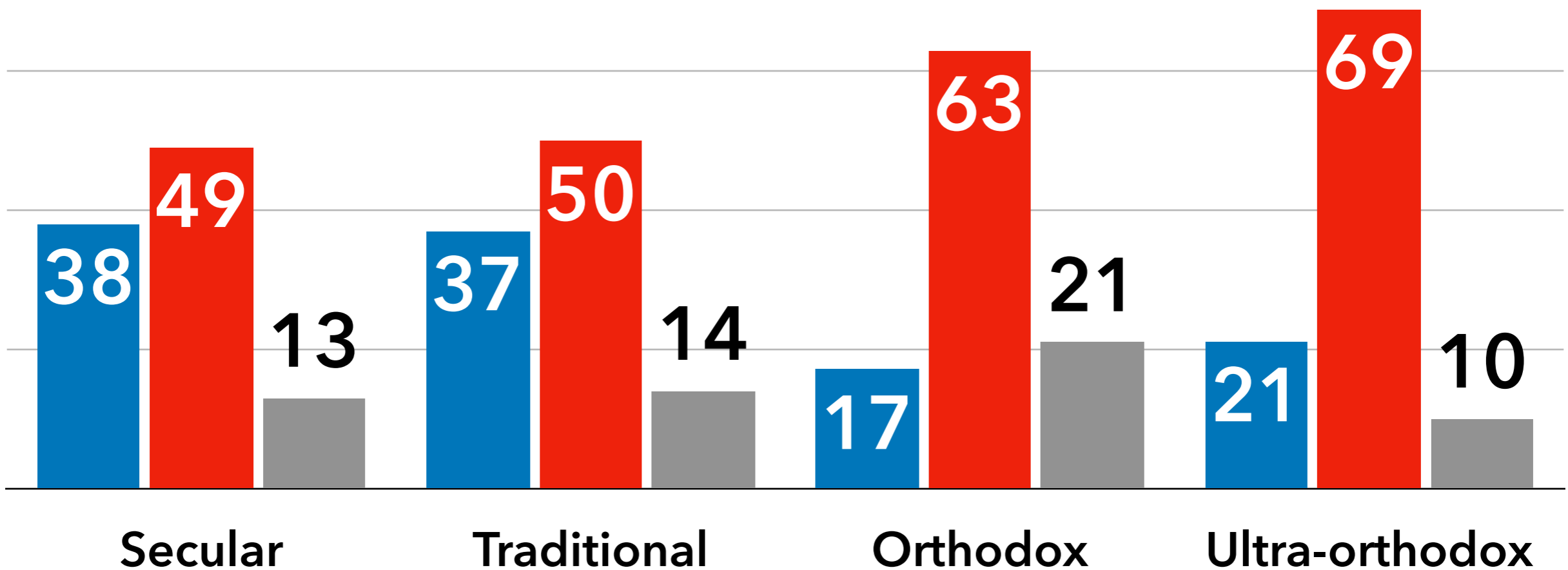
Thinking about the northern border, is it better for Israel to reduce the threat from Hezbollah through (ROTATE) an internationally brokered ceasefire or military activity? (ROTATE)



Support for military activity in north over a ceasefire crosses religiosity

Thinking about the northern border, is it better for Israel to reduce the threat from Hezbollah through (ROTATE) an internationally brokered ceasefire or military activity? (by religiosity)

■ Internationally brokered ceasefire ■ Military activity ■ Don't Know

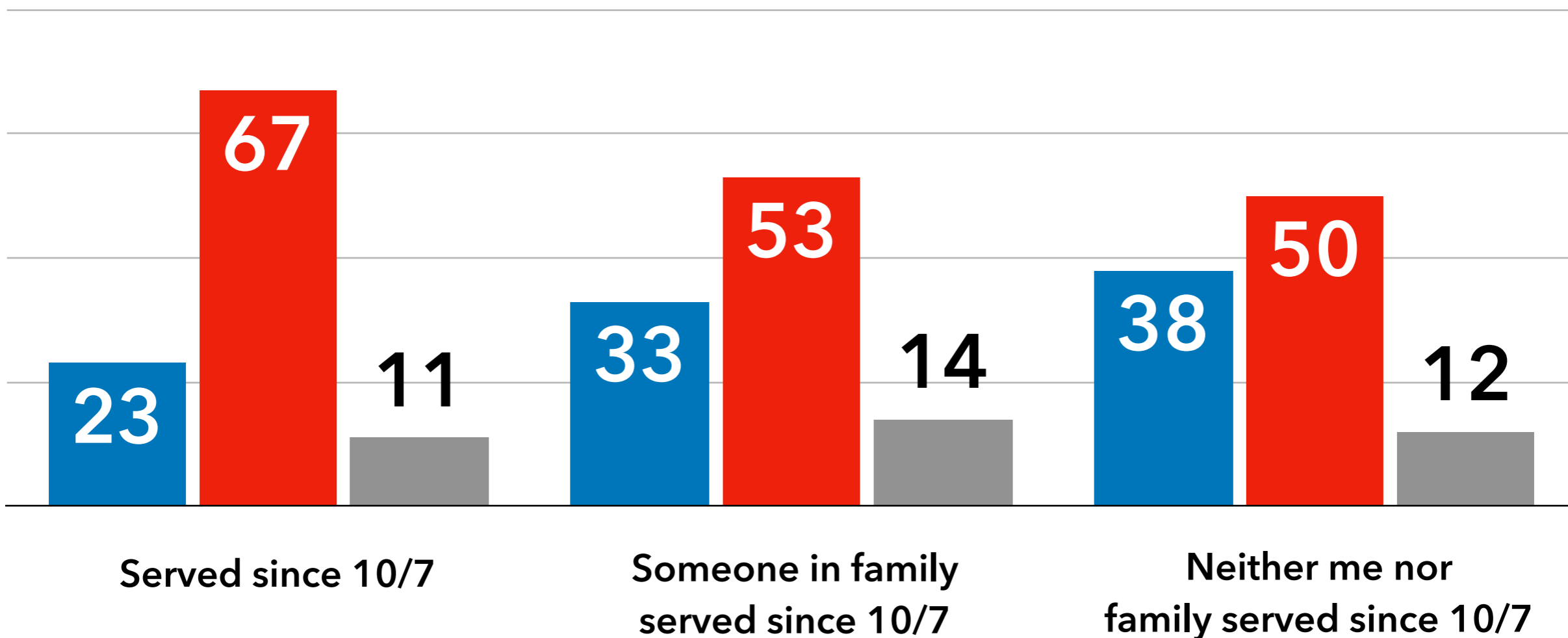


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Support for military activity in north strongest amongst those who served active or reserve duty since 10/7

Thinking about the northern border, is it better for Israel to reduce the threat from Hezbollah through (ROTATE) an internationally brokered ceasefire or military activity? (by service since 10/7)

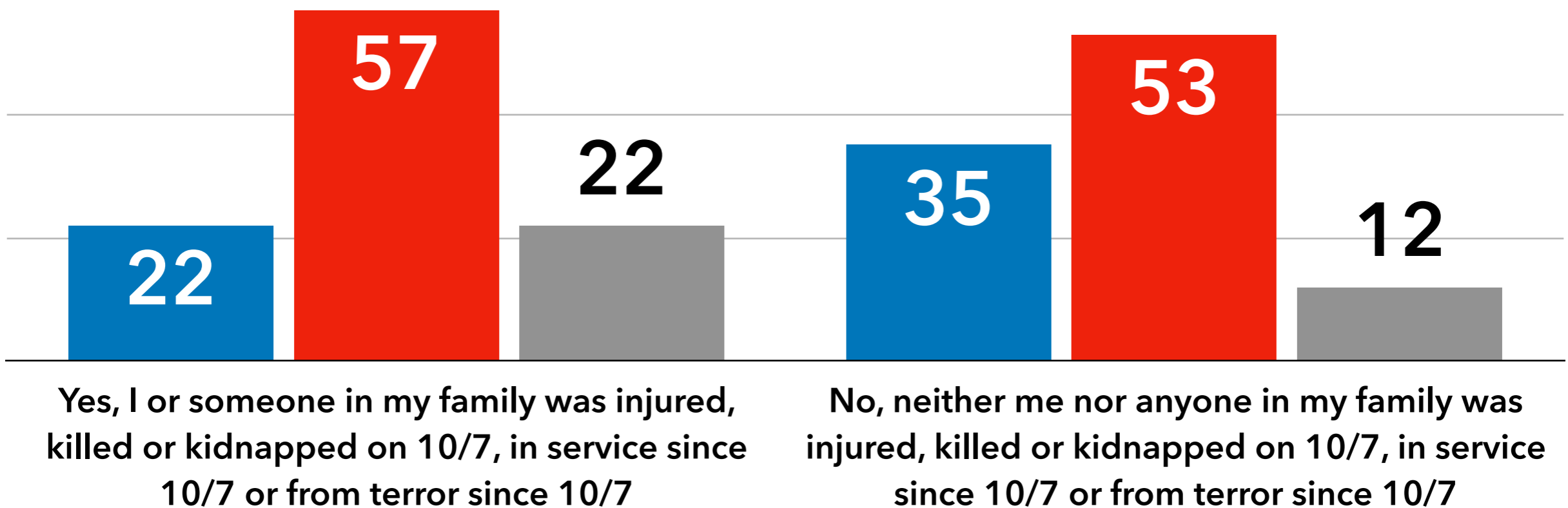
■ Internationally brokered ceasefire ■ Military activity ■ Don't Know



Support for military activity in north similar amongst those most and less impacted by 10/7

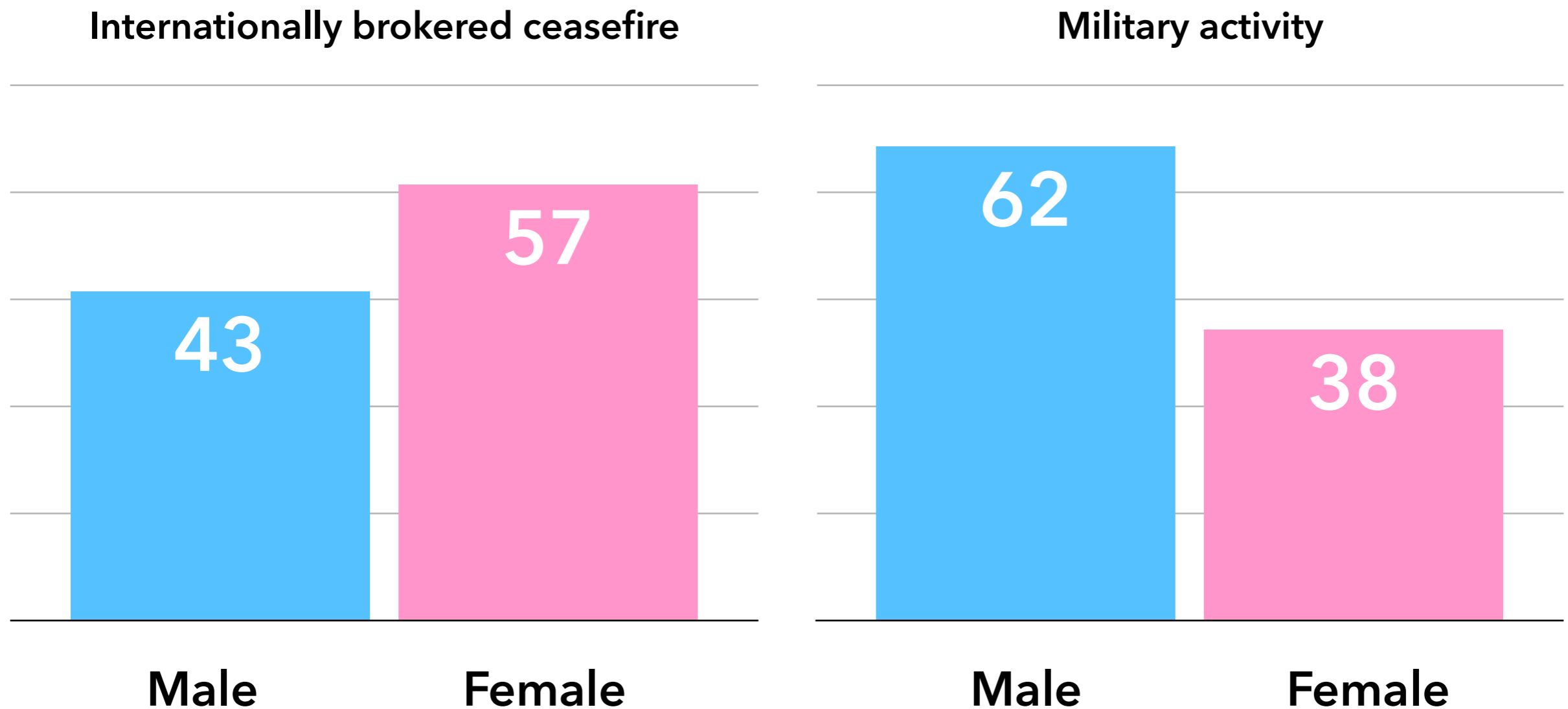
Thinking about the northern border, is it better for Israel to reduce the threat from Hezbollah through (ROTATE) an internationally brokered ceasefire or military activity? (by injured/killed/kidnapped since 10/7)

■ Internationally brokered ceasefire ■ Military activity ■ Don't Know



Gender divide in support for ceasefire or military activity in north

Thinking about the northern border, is it better for Israel to reduce the threat from Hezbollah through (ROTATE) an internationally brokered ceasefire or military activity? (by gender)

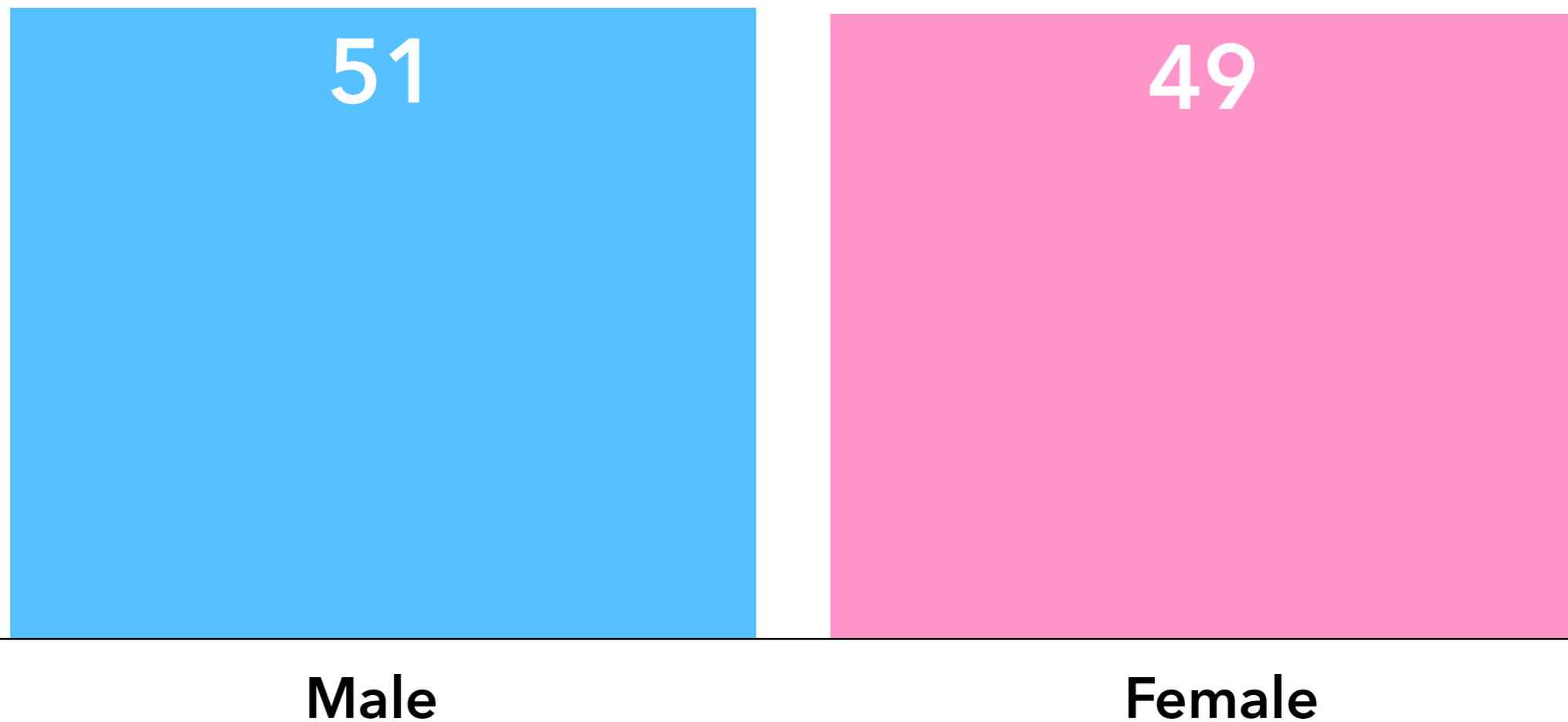


Survey socio-demographics



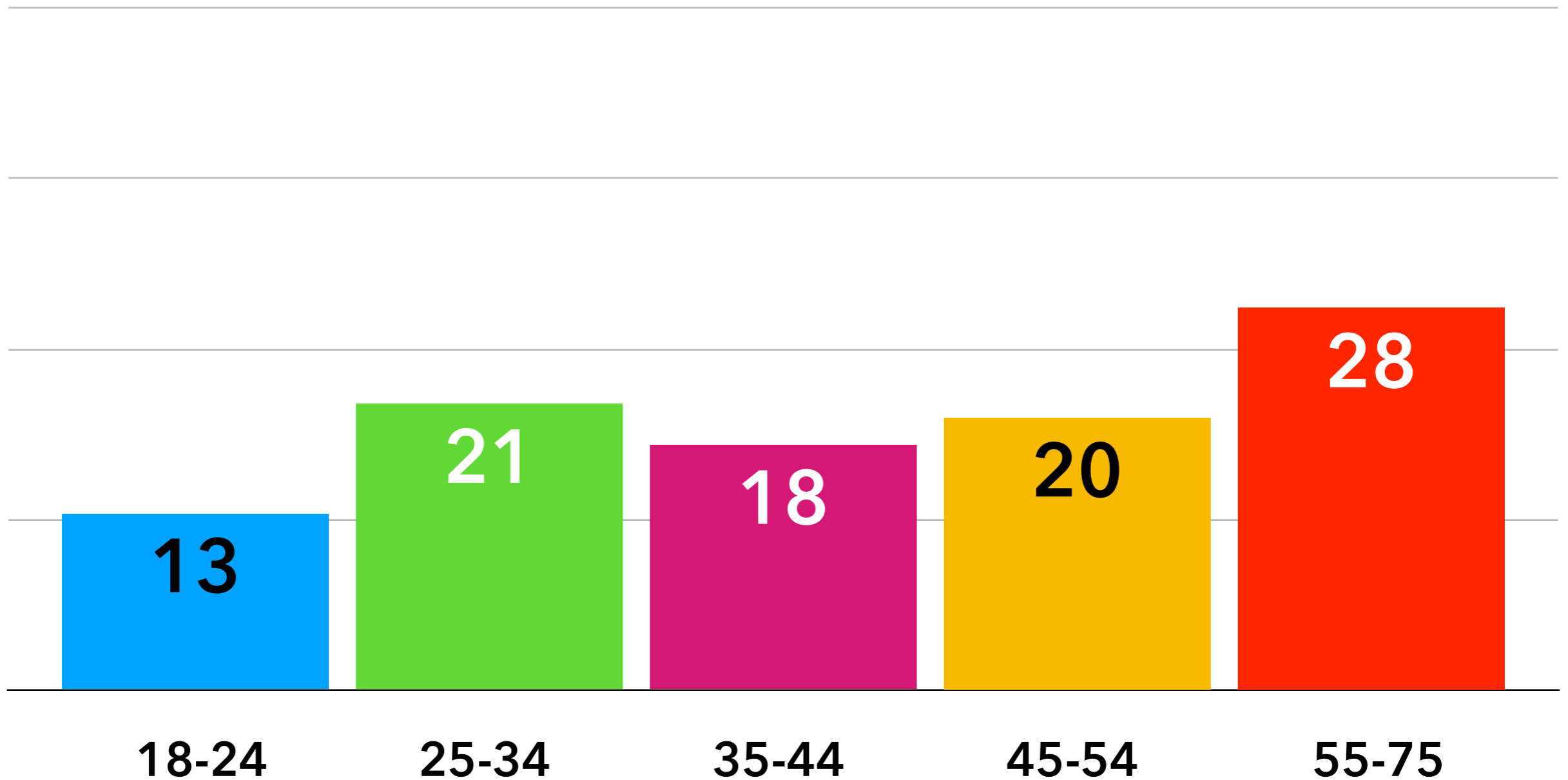
Gender of likely voters 50/50

Gender (recorded)



Age of likely voters

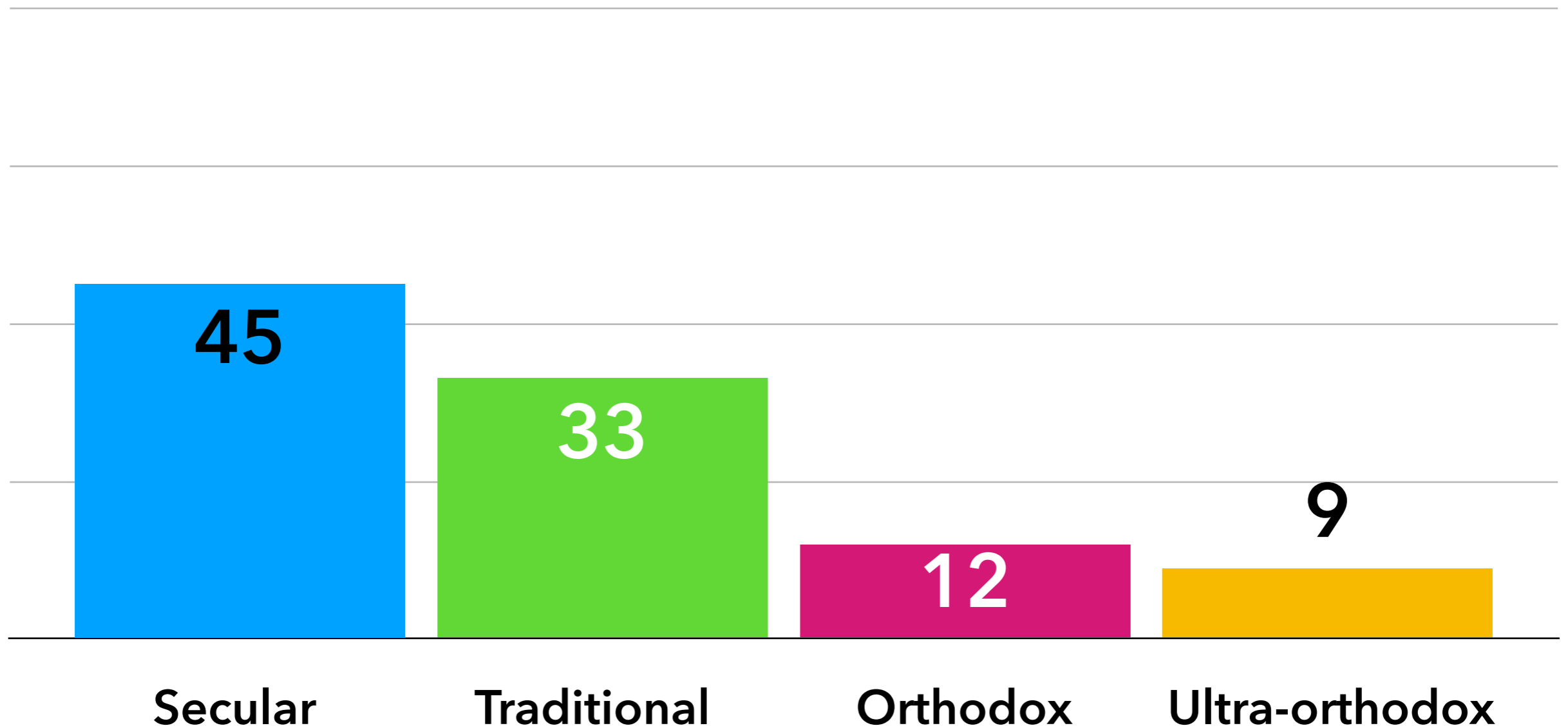
In what year were you born?



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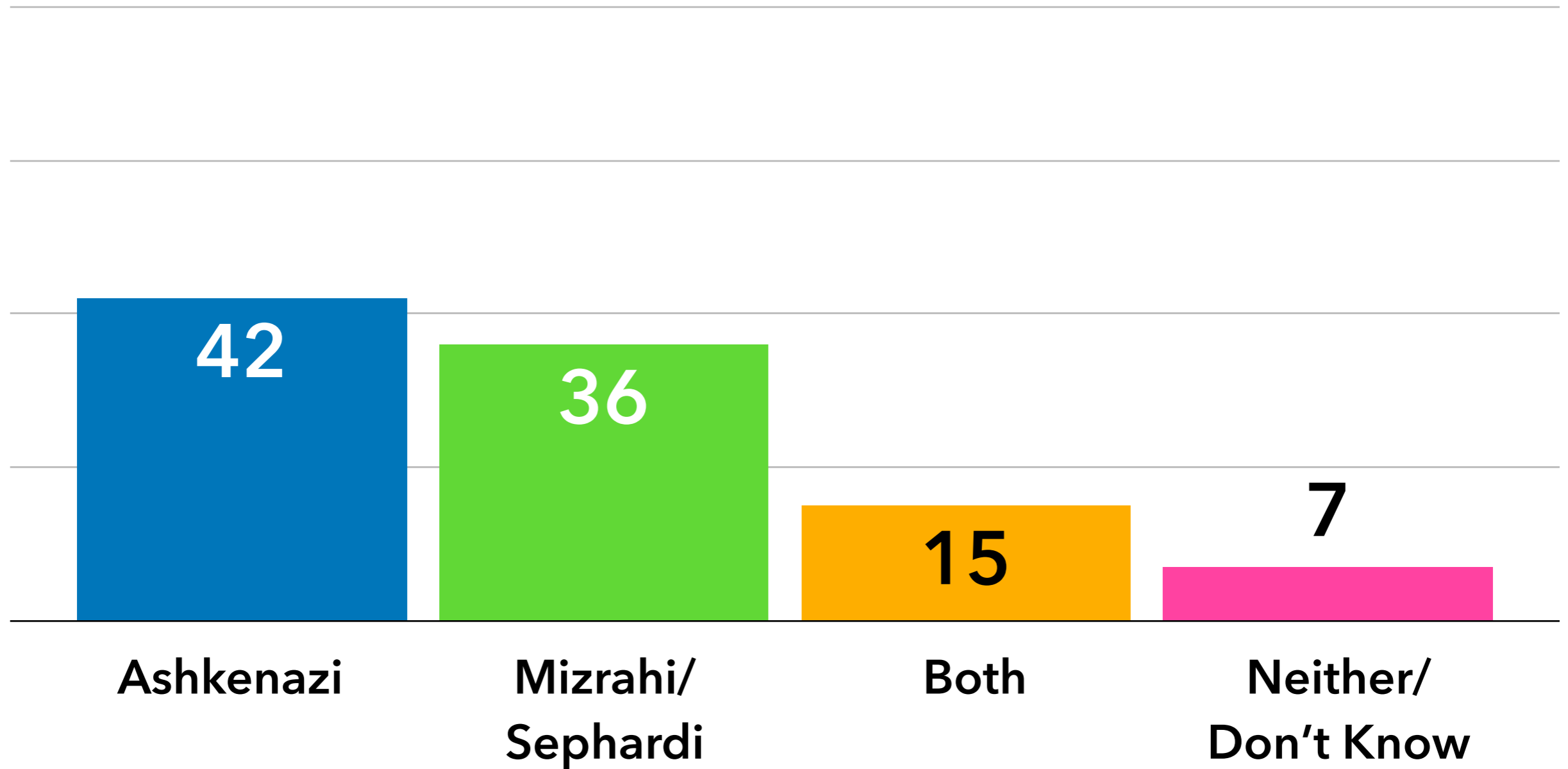
Religiosity of likely voters

How would you define yourself religiously? Would you say you are ultra orthodox, orthodox, traditional, or secular? If you are not Jewish just say so.



Heritage of likely voters

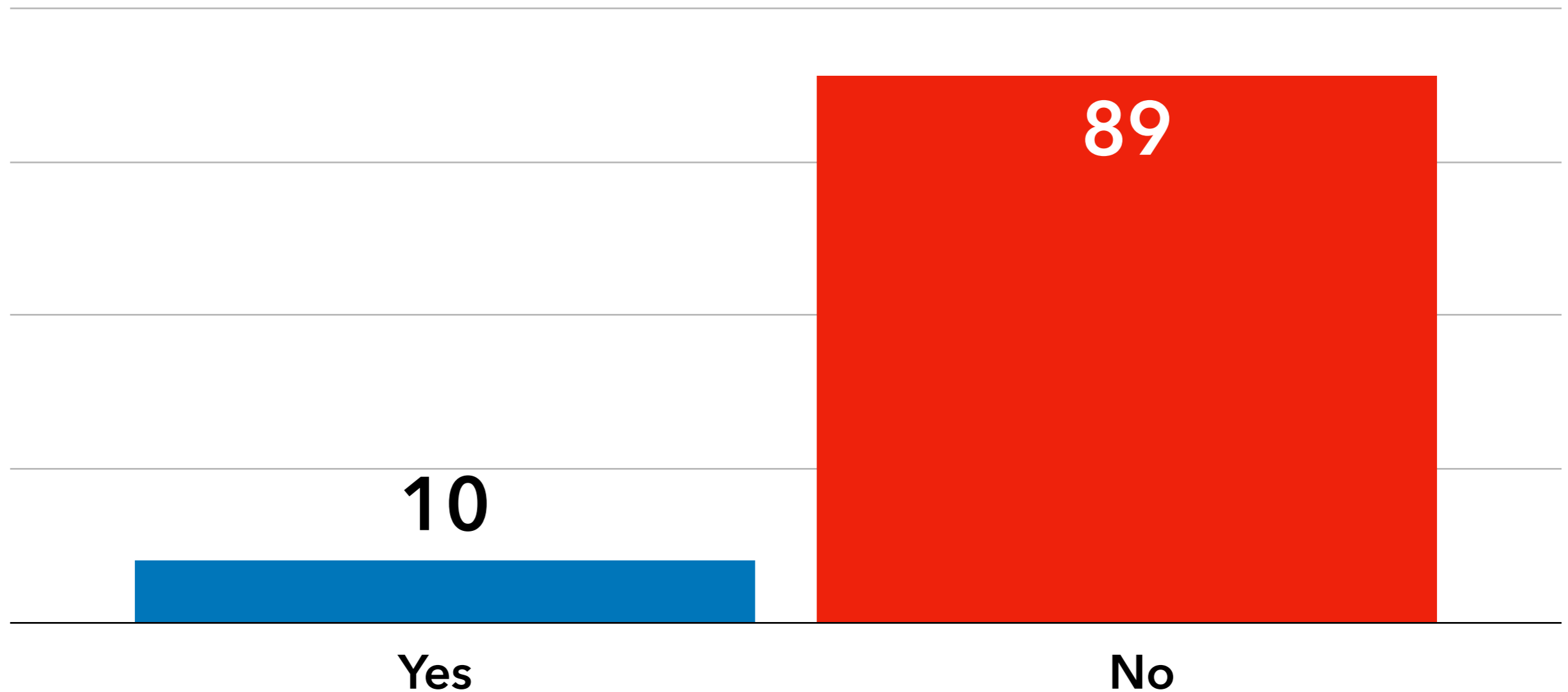
What best describes your heritage? (READ CHOICES)



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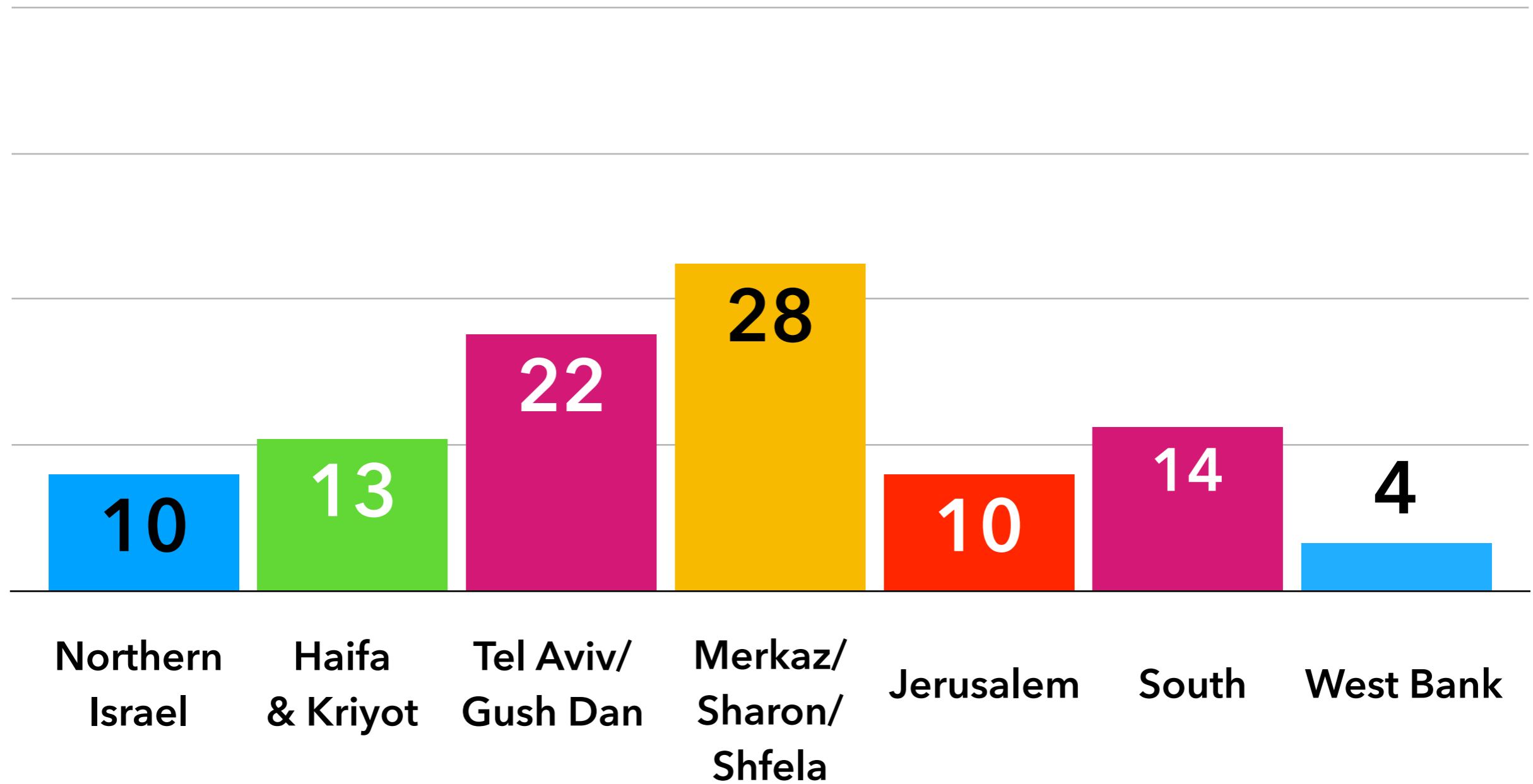
10% of likely voters immigrated from the FSU

Did you move from the Former Soviet Union after 1989?



Geographic distribution of likely voters

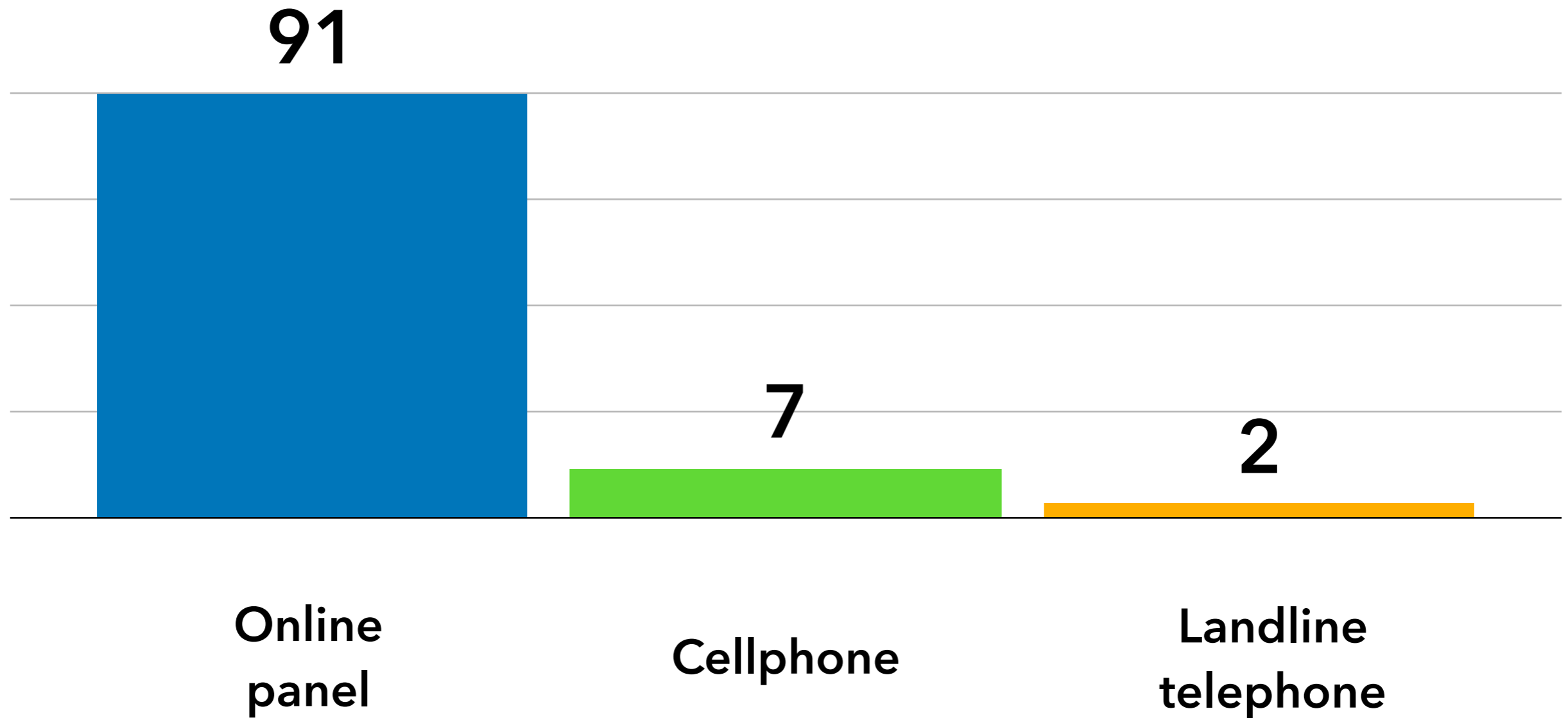
Location of residence



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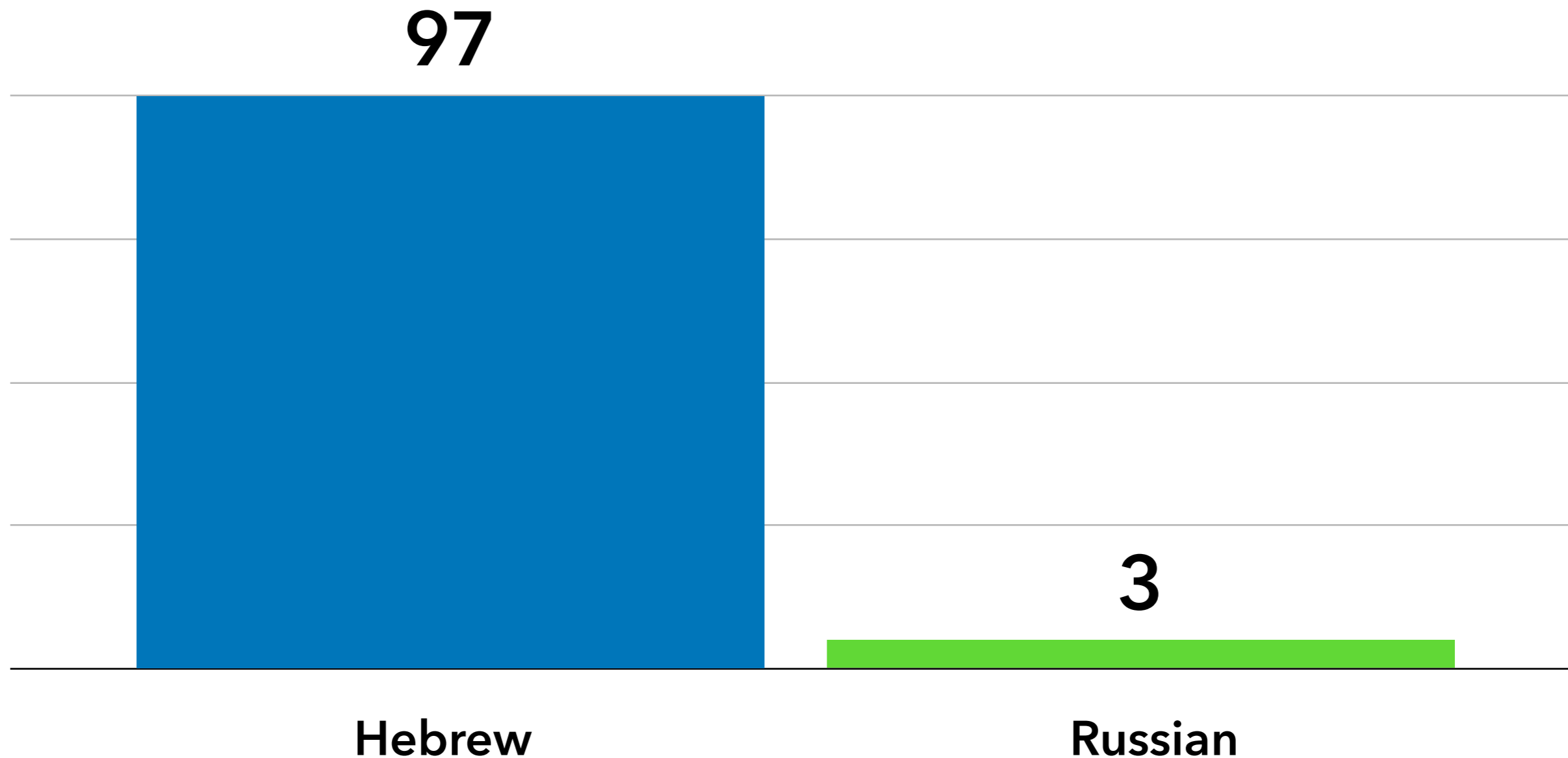
91% online panel, supplemented with cellphone and telephone contacts

Survey contact method



Hebrew language survey supplemented with Russian language contact

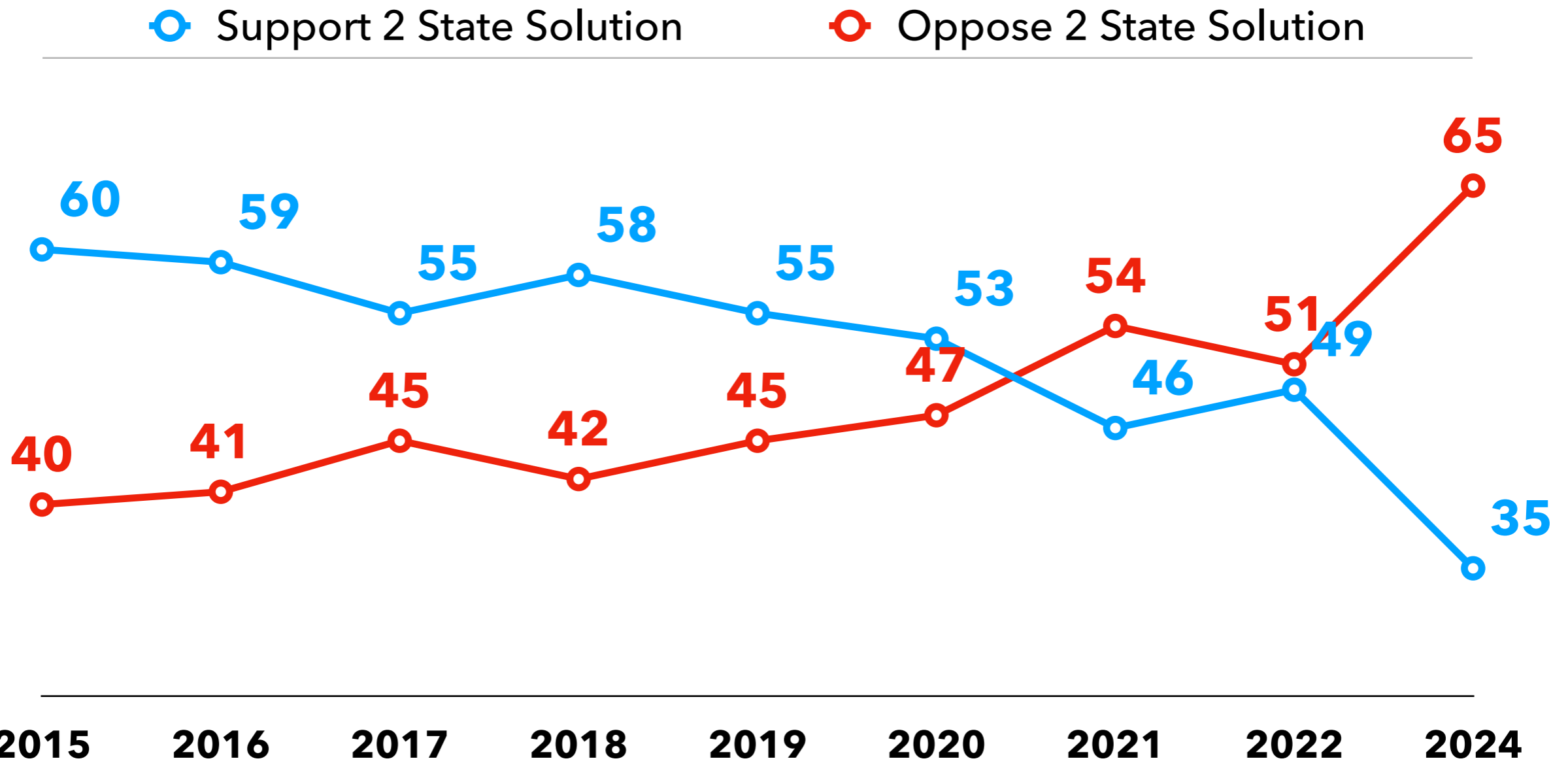
Language of contact



Recent Publicly Available Israeli & Palestinian Polling



Israeli Jewish Public Opinion Collected March 7-10, 2024: Low Support for the 2 State Solution

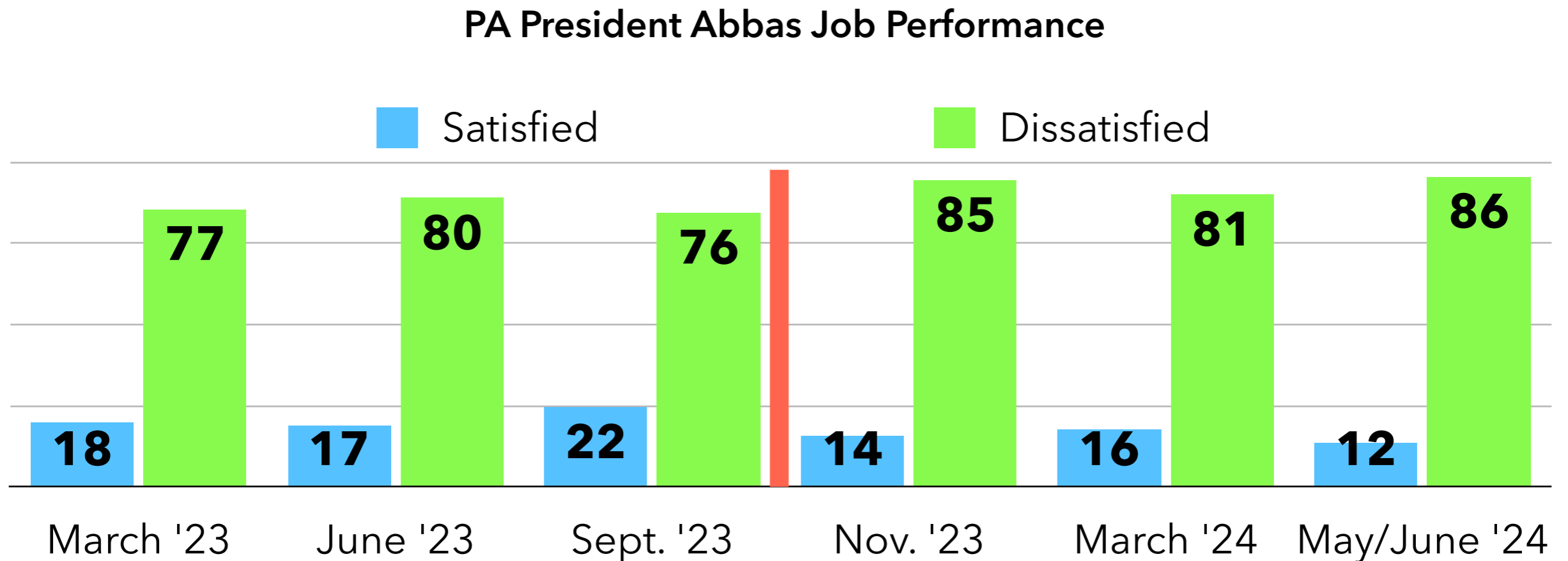


Institute for National Security Studies (Israel) Research carried out between March 7-10 2024 by the Rafi Smith Institute, during which 500 men and women were interviewed online, constituting a representative sample of the adult Jewish population in Israel aged 18 and over. The maximum margin of error for the sample is 4% with a 95% confidence level.

Margin of error +/-3%



>85% of Palestinians in the West Bank & Gaza Dissatisfied with PA President Abbas Job Performance

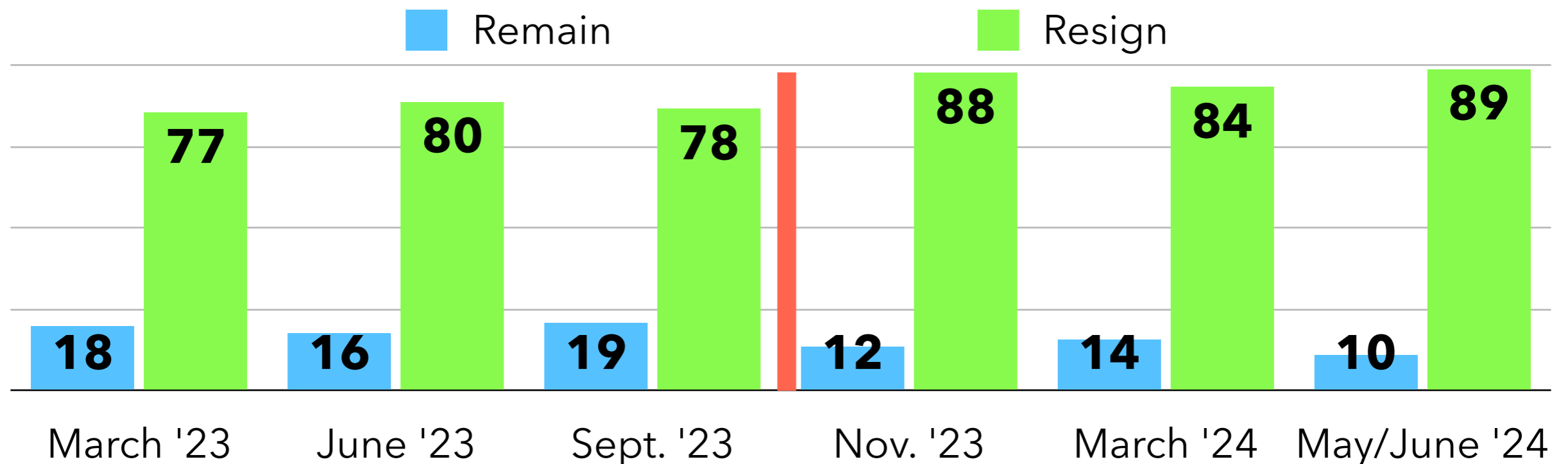


Palestinian Center for Policy and Survey Research: Polling conducted from March 8-11 '23, June 7-11 '23, Sept. 6-9 '23, Nov. 22 - Dec. 2 '23, March 5-10 '24, and May 26-June 1 '24. Sample size 1,200 adults or more interviewed face-to-face in over 100 randomly selected locations. Margin of error +/-3%



Nearly 90% of Palestinians in the West Bank & Gaza Want PA President Abbas to Resign

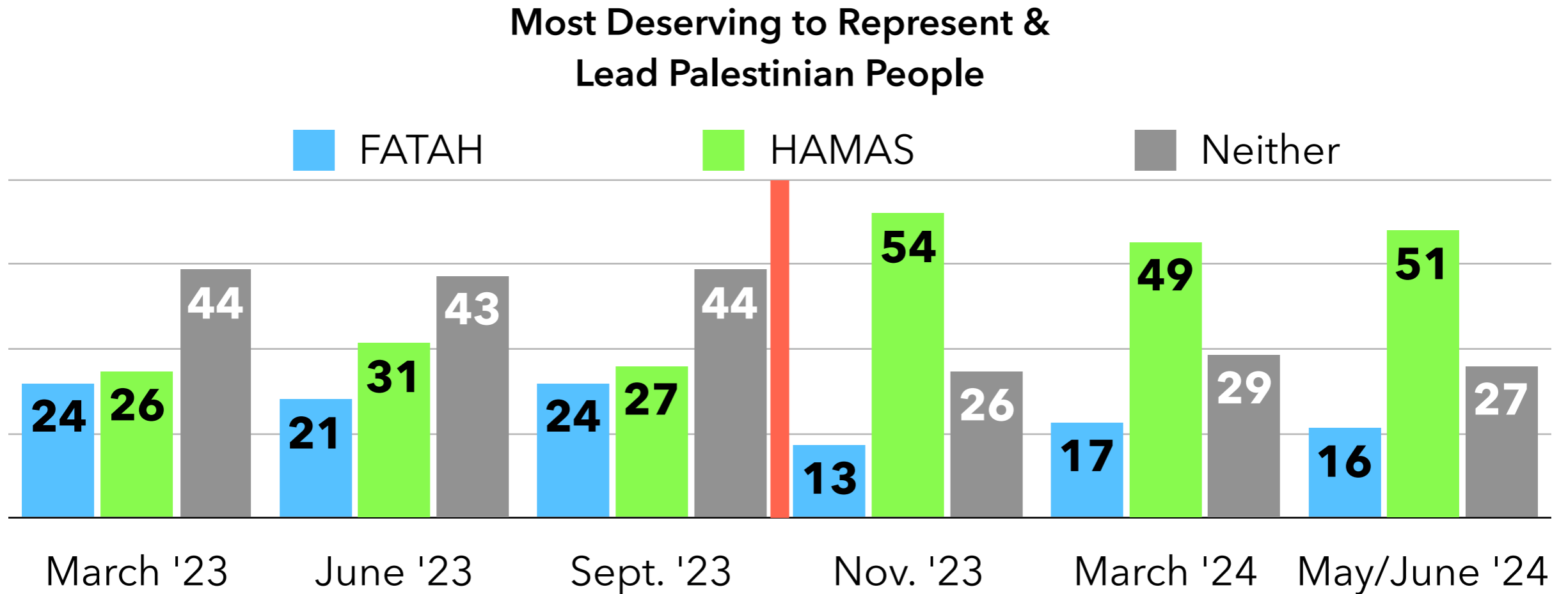
Should PA President Abbas Remain or Resign from office?



Palestinian Center for Policy and Survey Research: Polling conducted from March 8-11 '23, June 7-11 '23, Sept. 6-9 '23, Nov. 22 - Dec. 2 '23, March 5-10 '24, and May 26-June 1 '24. Sample size 1,200 adults or more interviewed face-to-face in over 100 randomly selected locations. Margin of error +/-3%



HAMAS Remains Party Seen as Most Deserving to Lead

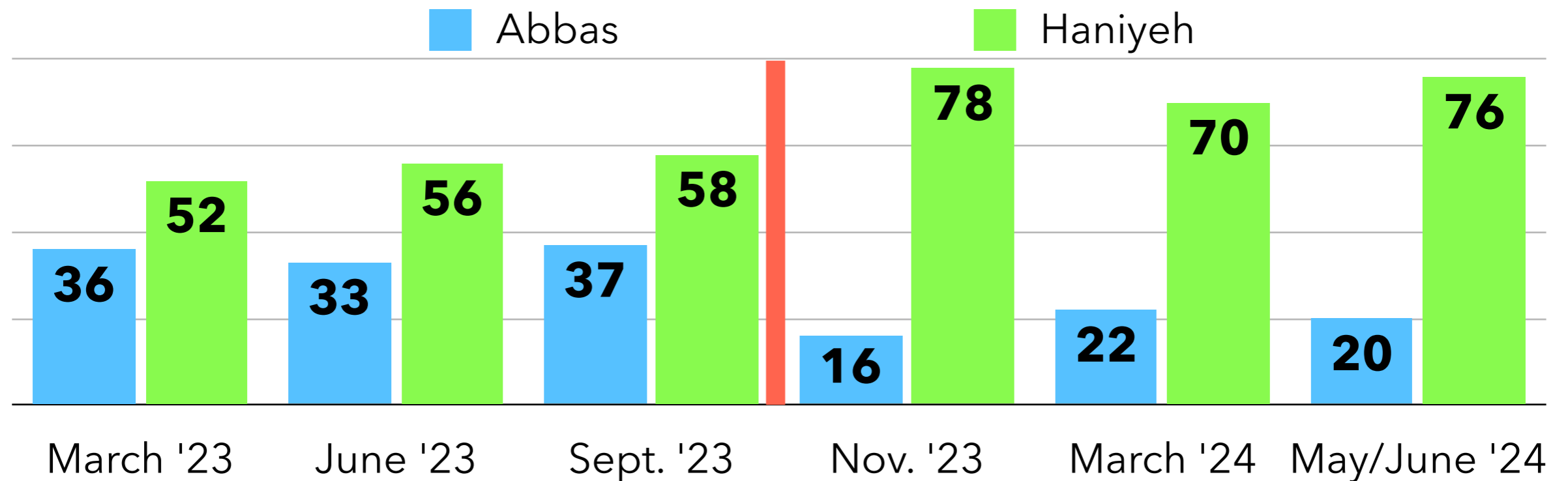


Palestinian Center for Policy and Survey Research: Polling conducted from March 8-11 '23, June 7-11 '23, Sept. 6-9 '23, Nov. 22 - Dec. 2 '23, March 5-10 '24, and May 26-June 1 '24. Sample size 1,200 adults or more interviewed face-to-face in over 100 randomly selected locations. Margin of error +/-3%



HAMAS Leader Ismail Haniyeh Would Win an Election Against PA President Abbas

Election: PA Pres. Abbas v. HAMAS' Haniyeh

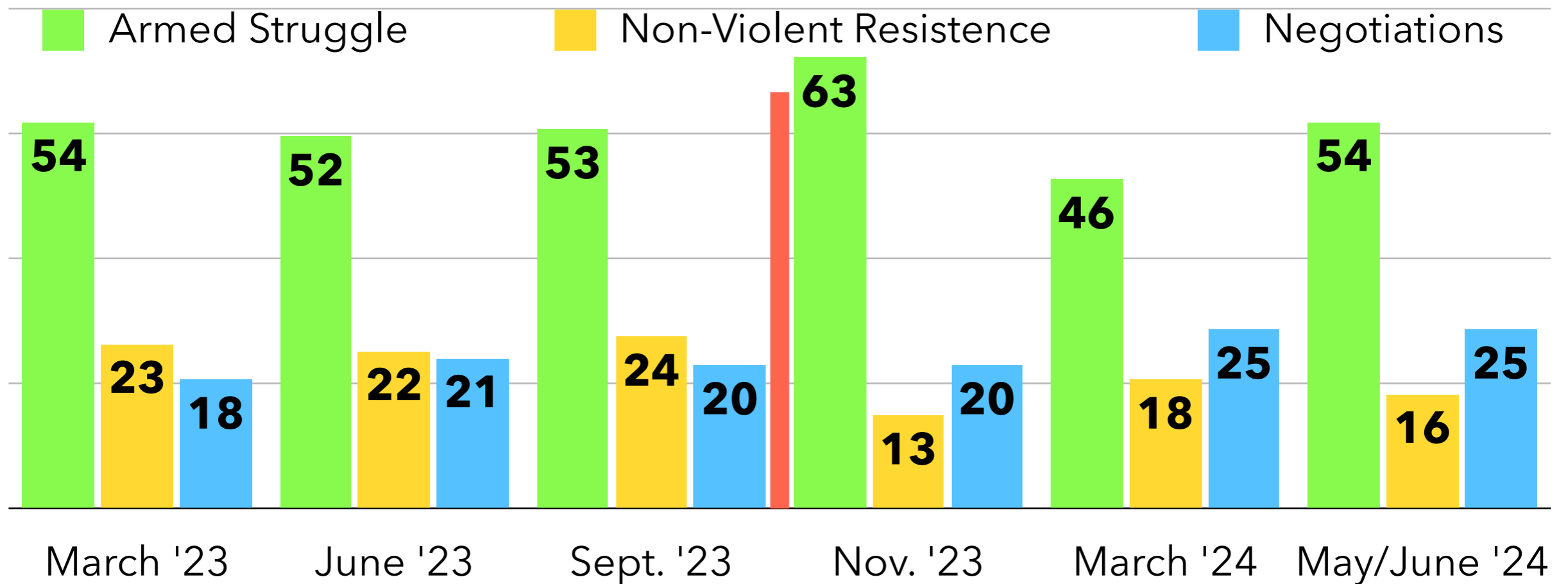


Palestinian Center for Policy and Survey Research: Polling conducted from March 8-11 '23, June 7-11 '23, Sept. 6-9 '23, Nov. 22 - Dec. 2 '23, March 5-10 '24, and May 26-June 1 '24. Sample size 1,200 adults or more interviewed face-to-face in over 100 randomly selected locations. Margin of error +/-3%



Violence Against Israel Still Seen as Effective by Palestinians

Most Effective Means of Ending Occupation & Building Independent State



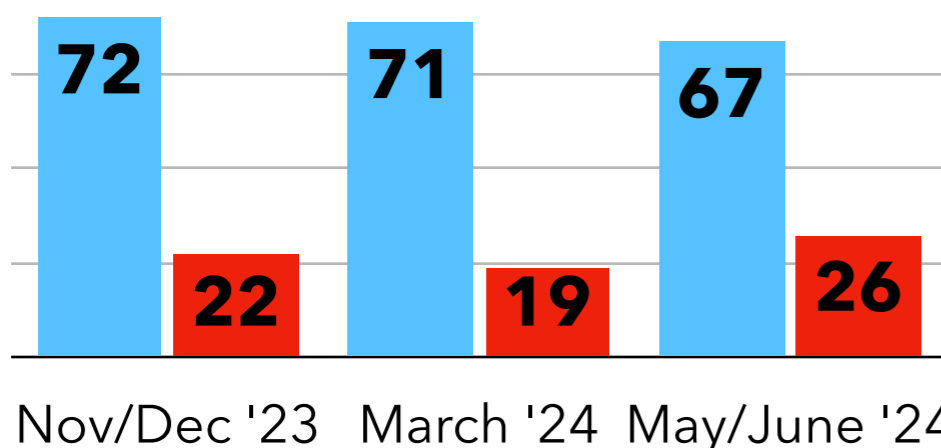
Palestinian Center for Policy and Survey Research: Polling conducted from March 8-11 '23, June 7-11 '23, Sept. 6-9 '23, Nov. 22 - Dec. 2 '23, March 5-10 '24, and May 26-June 1 '24. Sample size 1,200 adults or more interviewed face-to-face in over 100 randomly selected locations. Margin of error +/-3%



Even After Oct. 7, Palestinians Support the Oct. 7 Massacre

In your view, given what happened after it, was HAMAS decision to launch its offensive against Israel on October 7 a correct or incorrect one?

Correct Incorrect

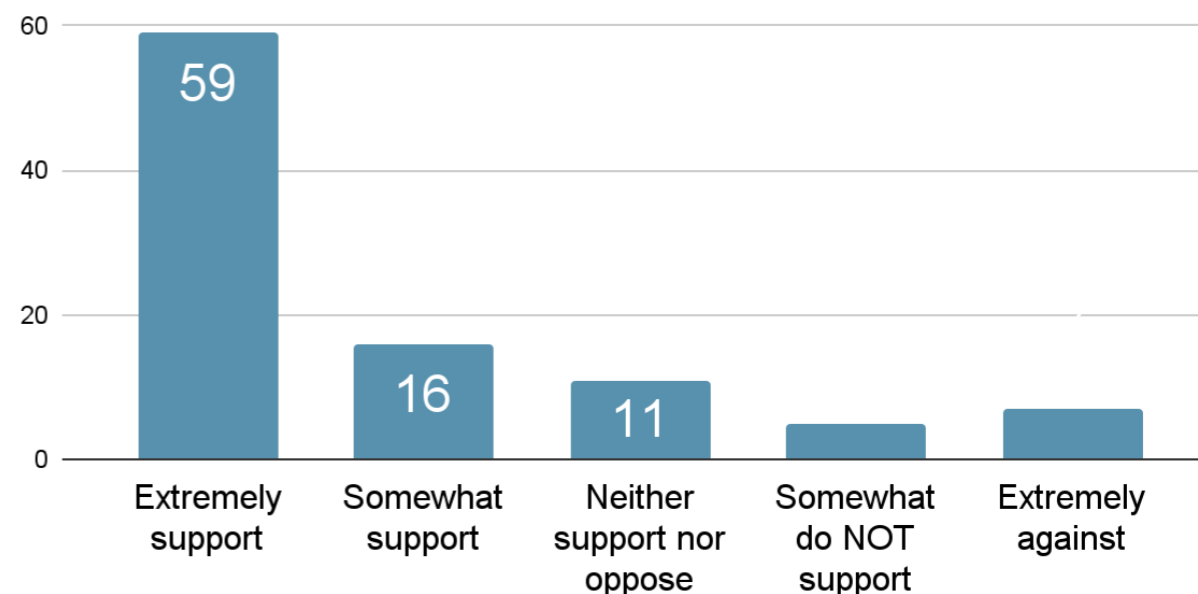


Palestinian Center for Policy and Survey Research Nov. 22 - Dec. 2 '23, March 5-10 '24, and May 26-June 1 '24. Sample size 1,200 adults or more interviewed face-to-face in over 100 randomly selected locations. Margin of error +/-3%

75% of Palestinians support the October 7 Massacre

Arab World for Research & Development conducted Palestinian public opinion research in the West Bank and Gaza between October 31 and November 7 (the 4th week of war).

How much do you support the military operation carried out by the Palestinian resistance led by HAMAS on October 7th?



Survey of Israeli Public Opinion

July 23, 2024



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