Jerusalem Institute for Israel Studies

Jerusalem: Facts and Trends 2015

The State of the City and Changing Trends

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- About the Authors -

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- Preface -

Jerusalem: Facts and Trends – The State of the City and Changing Trends provides an up-to-date picture of Jerusalem in all its manifold aspects such as population, employment, education, construction and tourism. The aim of the publication is to facilitate access for all to the main findings of the *Statistical Yearbook of Jerusalem*, by means of a brief narrative description accompanied by graphs and illustrative maps that make it easier to understand developments in Jerusalem, the largest and most complex city in Israel.

The principal source of the data presented in this publication is the *Statistical Yearbook*, which contains some 250 detailed tables and dozens of graphs. The *Yearbook* is published annually by the Jerusalem Institute for Israel Studies and the Jerusalem Municipality, with the support of the Jerusalem Development Authority (JDA) and the Leichtag Foundation (USA). The data appearing in the *Yearbook* are collected from numerous and varied sources, chief among which are the Central Bureau of Statistics and the Jerusalem Municipality.

We would like to express our thanks to all those who have contributed to the *Statistical Yearbook* and *Facts and Trends*. Our thanks and appreciation also go to Caroline Kahlenberg for proofreading, Esti Boehm for the production of this volume and to Hamutal Appel for preparing the text for printing.

Dr. Maya Choshen and Michal Korach

- Summary -

The following is a brief summary of the findings of this volume:

Population – In 2013 the population of Jerusalem numbered 829,900 residents, of whom 522,200 (63%) were Jewish and other (non-Arab), and 307,600 (37%) were Arab. In areas added to the city after 1967 there were 507,500 residents, of whom 201,900 were Jewish, constituting 40% of all the residents of those areas and 39% of the city's total Jewish population. A total of 305,500 Arabs resided in these areas, constituting 60% of all the residents in those areas and 99% of Jerusalem's Arab population.

During the course of 2013, Jerusalem's population increased by 1.8% (14,600 persons). The Jewish population grew by 1.4% (7,100 persons), and the Arab population by 2.5% (7,500 persons). These data indicate that the Arab population growth is greater than the Jewish population growth, both relatively and in absolute numbers.

Natural increase – The rate of natural increase among the Arab population of Jerusalem was somewhat higher than that of the Jewish population. In 2013 the rate of natural increase (the difference between the number of births per thousand and the number of deaths per thousand) for the Jewish population was 23.1 per thousand as compared with 23.7 for the Arab population. It should be noted that the rate of natural increase of the city's Jewish population is significantly higher than that of the Jewish population of Israel – 23.1 and 14.8, respectively. The rate of natural increase of the Arab population in Jerusalem (23.7) is also higher than that of the Arab population in Israel (20.8) although the disparity is lower than that for the Jewish population.

Fertility – For many years the fertility rate of Arab women in Jerusalem was higher than that of Jewish women. However over the past five years the overall fertility rate (the number of expected births during a woman's lifetime) of Arab women has decreased, while the fertility rate of Jewish women has increased. In 2008, for the first time, the overall fertility rate of Arab women equaled that of Jewish women, and since then the fertility rate of Jewish women has surpassed that of the Arab women. In 2013, the figure was 4.3 children on average for Jewish women and 3.4 children on average for Arab women. These data are likely to have ramifications for the growth rates of both populations such that, if this trend continues, there is expected to be a decrease in the growth rate of the Arab population and a concomitant increase in the growth rate of the Jewish population.

Migration – In 2013, a total of 17,900 residents left Jerusalem for other localities in Israel, while 10,500 new residents moved to Jerusalem from other localities in Israel. Consequently, the migration balance of the city was negative, at -7,400 residents. A geographical examination of the balance of migration reveals the following picture: The highest negative migration balance of Jerusalem was recorded in relation to its metropolitan area (-4,600 residents), which includes Judea and Samaria (-2,800) as well as the Jerusalem District (-1,800). The localities with which Jerusalem had the highest negative migration balance were Beit Shemesh (-1,100), Tel Aviv (-880), Betar Illit

(-750), Giv'at Ze'ev (-690), and Modi'in-Maccabim-Reut (-690). Close to half (48%) of those leaving the city moved to localities in the Jerusalem metropolitan area, while 38% of new residents moved to Jerusalem from localities in its metropolitan area.

The migration balance of the ultra-orthodox (haredi) population was negative, calculated at -2,700, constituting 31% of the total negative migration balance of Jerusalem. The principal localities to which this population moved when leaving Jerusalem were Beit Shemesh, Betar Illit, Modi'in Illit, and Giv'at Ze'ev.

Aliya (Immigration) – In 2013 a total of 2,300 new immigrants settled in Jerusalem, higher than the figures for Tel Aviv (1,500) and Haifa (1,100). The new immigrants who settled in Jerusalem constituted 14% of all immigrants to Israel, compared with 9% in Tel Aviv and 5% in Haifa. Of the immigrants who settled in Jerusalem in 2010-2013, some 32% were from the United States, 20% from France, 18% from the former Soviet Union, and 8% from Britain. For the sake of comparison, in Israel at large 43% of new immigrants were from the former Soviet Union, 14% from the United States, 12% from France, and 12% from Ethiopia.

Construction – The year 2013 was a record year for new construction projects in Jerusalem, and this trend continued in 2014. During 2014 construction was initiated on some 3,700 housing units, the highest number of new apartments initiated in Jerusalem during the past twenty years. The year 2013 was also a record year for the completion of construction projects in Jerusalem, and again this trend continued in 2014, with the completion of some 2,500 housing units. During these two years the number of new apartments completed was the highest Jerusalem has seen in the past decade.

Education – The education system in Jerusalem is the largest, most diverse, and most complex in Israel. During the 2014/2015 academic year a total of 274,600 students were enrolled in Jerusalem schools. Of these, 63,300 students were enrolled in the Hebrew educational system through the Jerusalem Education Administration, which includes state schools, state-religious schools, and state-ultra-orthodox schools. 100,700 students were enrolled in ultra-orthodox schools. Within the Arab education system there were 110,600 students (89,600 in public schools and another some 21,000 in private education institutions).

Over the past five years (2010/2011–2014/2015) there has been an increase of 8% in the number of students enrolled in state schools, state-religious schools, and state-ultra-orthodox schools. During the same period, enrollment in ultra-orthodox schools increased by 6%. In the Arab sector (public schools and recognized but unofficial schools) there was an increase of 30% in the number of students.

In the academic year 2012/2013, Jerusalem's higher education institutions had a total of 38,100 students, constituting 15% of the total for Israel. The Hebrew University of Jerusalem[1] had a total of some 20,300 students. A total of 11,800 students were enrolled

[1] Including the Hebrew University campus in Rehovot.

in seven academic colleges, and 6,000 students were enrolled in five academic colleges of education.

Employment – The rate of participation in the labor force in 2013 for the peak working ages (25-54) in Jerusalem was 68% – considerably lower than the rate in Israel (82%), in Tel Aviv (89%), and in Haifa (87%). Interestingly, the rate of participation in the labor force for Jewish women of peak working ages (82%) was higher than the rate for men (72%). By contrast, in Israel the rate of participation for Jewish women (87%) is comparable to the rate for Jewish men (88%).

The rate of participation in the labor force for Arab women of peak working age in Jerusalem is very low (22%), significantly lower than the rate for Arab men (87%). In Israel at large, the rate of participation for Arab women (36%) is higher than the rate for Arab women in Jerusalem (22%) but significantly lower than the rate for Arab men (82%). In Jerusalem the rate of participation in the labor force for Arab men is higher than the figure for Jewish men (87% and 72%, respectively). In Israel at large the situation is reversed, as the rate of participation for Arab men is somewhat lower than the rate of participation for Jewish men (82% and 88%, respectively).

Tourism – The unique cultural and religious character of Jerusalem; its status as the capital of Israel, the center of Jewish life, and a holy city for the three monotheistic religions; and its wealth of religious, historical, and archeological sites as well as cultural centers – these factors combine to make it a powerful magnet city for visitors from all over Israel and the world.

Jerusalem is a global tourist destination, and in 2014 it recorded 2,982,000 overnight hotel stays by tourists, constituting 32% of the total overnight hotel stays by tourists in Israel. This compares with 2,164,700 overnight tourist stays in Tel Aviv (24%) and 807,500 in Eilat (9%).

The number of overnight stays by Israelis in Jerusalem – and their proportion of the total of overnight stays by Israelis within Israel – is significantly lower than the figure for foreign tourists. In 2014 the number of overnight stays by Israelis in Jerusalem was 815,200 (6% of the total of overnight stays by Israelis within Israel), compared with 644,000 overnight stays in Tel Aviv (5%) and 6,157,500 (48%) in Eilat.

- Area -

Jerusalem is the largest city in Israel. Its area of jurisdiction encompasses 125,000 dunams. In comparison, Be'er Sheva encompasses 84,000 dunams, Haifa has an area of 69,000 dunams, Rishon Lezion has 59,000 dunams, Tel Aviv[2] has 52,000 dunams, and Ma'ale Adumim covers 49,000 dunams.

- Population -

Population size

Jerusalem is also the largest city in Israel in terms of population. At the end of 2013, the population of Jerusalem numbered 829,900. The second most populous city is Tel Aviv (with a population of 418,600 as of the end of 2013), followed by Haifa (273,200 residents).

The population of Jerusalem comprised 522,200 Jews[3] and 307,600 Arabs. The Arab population comprised a Muslim majority (295,500 – 96%) and Christian minority (15,000 – 4%).

The population of Jerusalem in 2013 constituted some 10% of the total population of Israel. The Jewish population constituted approximately 8% of the total Jewish population of Israel, while the Arab population constituted approximately 18% of the total Arab population of Israel.

Over the years, there has been a decline in the relative size of Jerusalem's Jewish population, with a concomitant increase in the proportion of the Arab population. The proportion of the Jewish population fell from 74% in 1967 to 72% in 1980, to 68% in 2000, and to 63% in 2013. Simultaneously, the Arab population rose from 26% in 1967 to 28% in 1980, 32% in 2000, and 37% in 2013.

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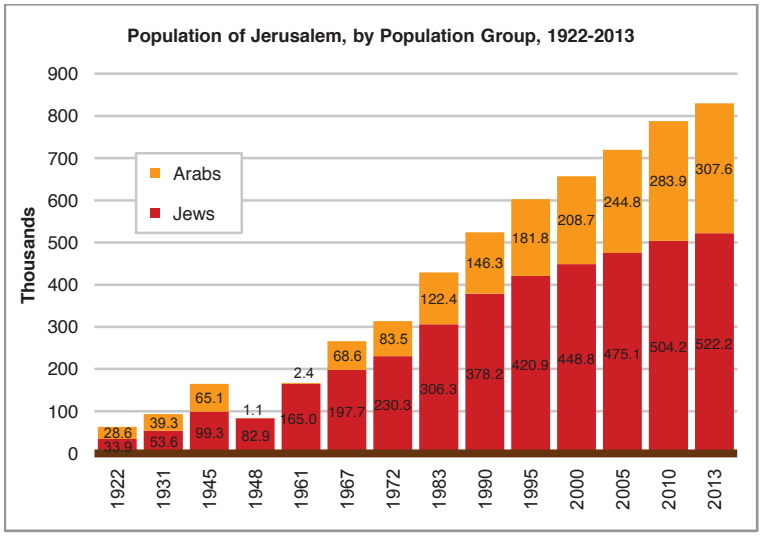
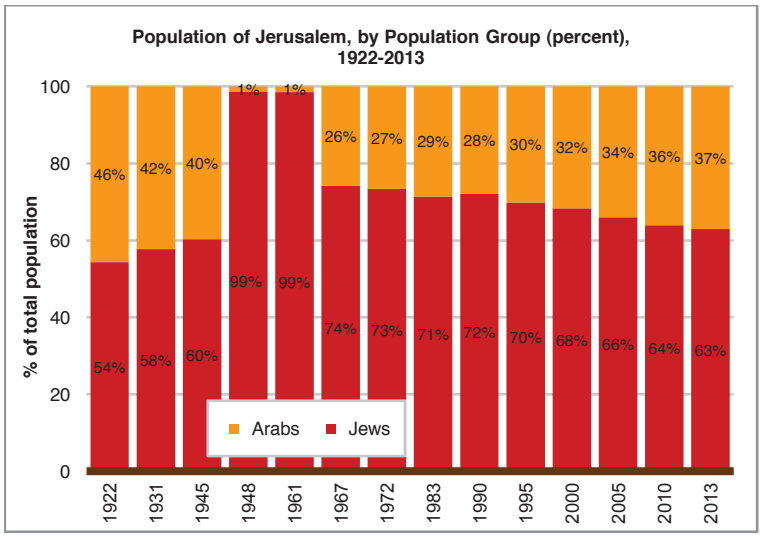
[2] All data relating to Tel Aviv refer to the city of Tel Aviv-Yafo.

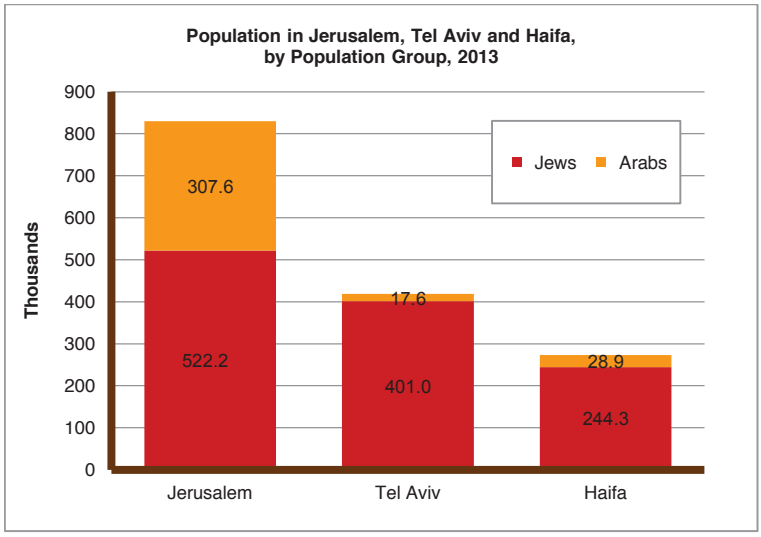
[3] Unless otherwise indicated, wherever the Jewish population is mentioned, it refers to the population group of "Jews and Others," that is, the entire non-Arab population, including Jews, non-Arab Christians, and persons not classified by religion.





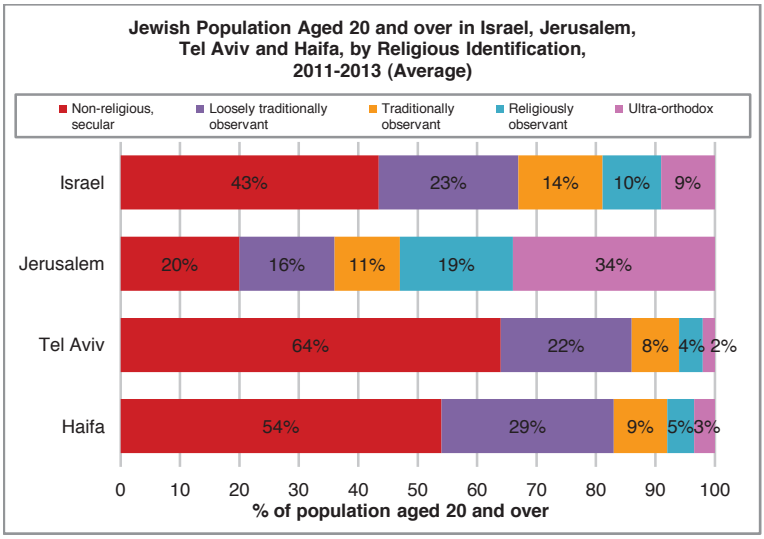
As noted, the Arab population of Jerusalem numbered 307,600 residents, exceeding the Arab population of large Arab cities in Israel. The largest Arab cities in Israel are Nazareth (74,400), Rahat (58,700), Umm El-Fahm (50,600), Taibe (39,600), and Shfaram (38,700).

The relative size of Jerusalem's Arab population (37%) is significantly greater than the proportion of the Arab population in Israel (21%), Haifa (11%) and Tel Aviv (4%).



Nature of religious identification

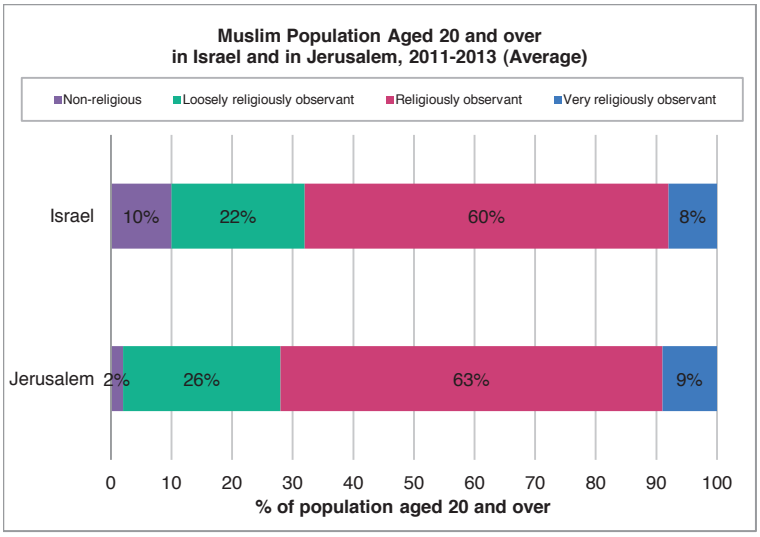
The population of Jerusalem is diverse and composed of groups with different characteristics. One of the factors that distinguish between the groups in Jerusalem is the nature of their religious identification. The social survey conducted by the Central Bureau of Statistics (CBS) among people aged 20 and above showed that during the years 2011-2013 (on average) 34% of the Jews in Jerusalem defined themselves as ultra-orthodox, 27% as traditional (traditionally observant and loosely traditionally observant), 19% as religiously observant, and 20% as secular. The percentage of Jews aged 20 and above in Jerusalem who defined themselves as ultra-orthodox (34%) was the highest among Israel's major cities, and was significantly higher than the percentage of the ultra-orthodox population in Israel as a whole (9%). For the sake of comparison, the percentage of the ultra-orthodox population in Tel Aviv and Haifa is 2%-3%. Among those aged 20 and above, the proportion of those defining themselves as religiously observant in Jerusalem (19%) was also higher than in Israel at large (10%). The proportion of the traditional in Jerusalem was 27%, which was lower than the percentage in Israel (37%) and was the lowest among the major cities in Israel. The percentage of the secular in Jerusalem (20%) was also low compared to Israel (43%), and was the lowest among the major cities in Israel. The percentage of the secular in Tel Aviv was the highest of the major cities, at 64%, compared with 54% in Haifa, 47% in Rishon Lezion, and 36% in Ashdod.



Nature of religious identification of the Jewish population (aged 20 and above) in Israel, Jerusalem, and the major cities, 2011-2013 (average)

Religious identification	Israel	**Jerusalem**	Tel Aviv	Haifa	Rishon Lezion	Ashdod
Total	100%	**100%**	100%	100%	100%	100%
Ultra-orthodox	9%	**34%**	2%	3%	2%	13%
Religiously observant	10%	**19%**	4%	5%	8%	6%
Traditionally observant	14%	**11%**	8%	9%	14%	18%
Loosely traditionally observant	23%	**16%**	22%	29%	29%	27%
Non-religious, secular	43%	**20%**	64%	54%	47%	36%

During the years 2011-2013 (on average), about 9% of the Muslim population of Jerusalem defined itself as very religiously observant, 63% as religiously observant, 26% as loosely religiously observant, and 2% as not religiously observant. A comparison between Jerusalem and Israel indicates that the degree of religious observance among the Muslim population of each is fairly comparable, with the exception of those who defined themselves as not religiously observant (2% in Jerusalem compared with 10% in Israel).



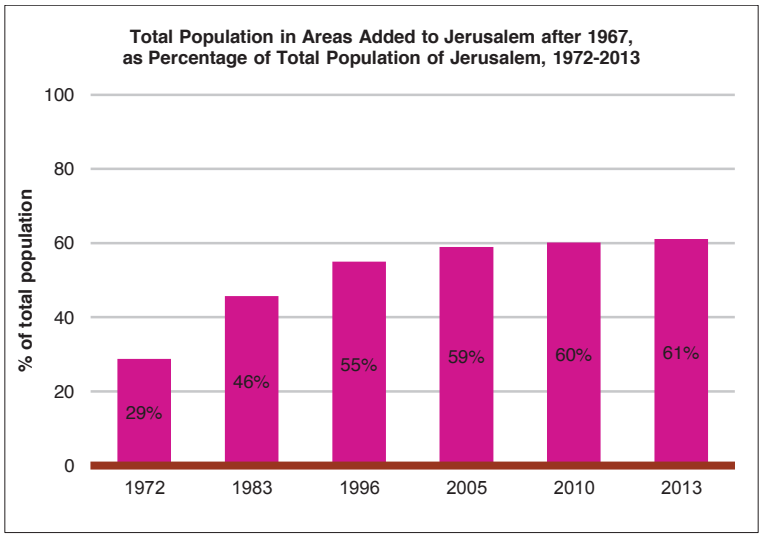
Nature of religious identification of the Muslim population (aged 20 and above) in Israel and in Jerusalem, 2011-2013 (average)

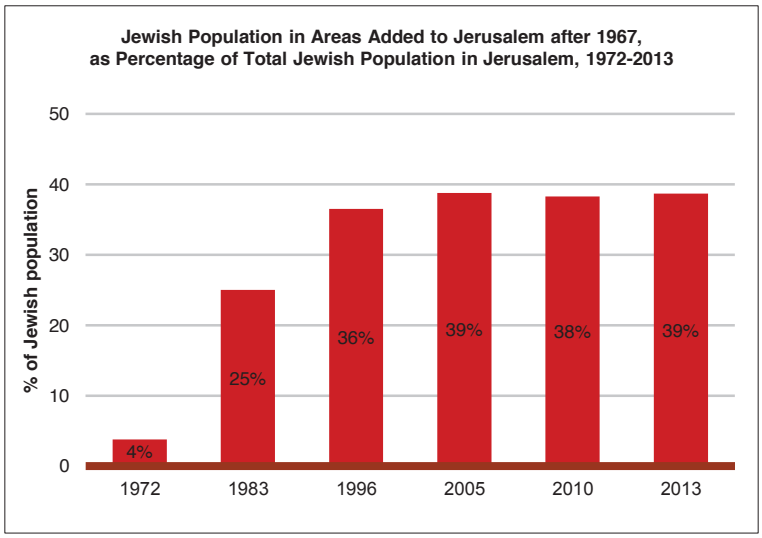
	Total	Not religiously observant	Loosely religiously observant	Religiously observant	Very religiously observant
Israel	100%	10%	22%	60%	8%
Jerusalem	**100%**	**2%**	**26%**	**63%**	**9%**

Geographical distribution of the population

At the end of 2013, a total of 507,500 of Jerusalem's residents (Jewish and Arab) lived in areas added to the city after 1967, constituting 61% of the total population of the city. Over the years, there has been a relative increase in this figure: in 1972, the percentage of the population living in the areas added after 1967 was 29% of the city's total population; this proportion rose to 46% in 1983, to 59% in 2005, and to 61% in 2013.

In 2013, a total of 201,900 Jewish residents lived in areas added to the city after 1967, constituting 40% of all residents in those areas and 39% of the entire Jewish population of the city. In the 1970s and 1980s, as large Jewish neighborhoods were being built in these areas, the number of Jewish residents rose significantly. In 1972, they numbered 8,700, just 4% of the total Jewish population of the city. In 1983 the figure was 25% and in 1996 it reached 36%. Since then it has not changed significantly, standing at 39% in 2013.



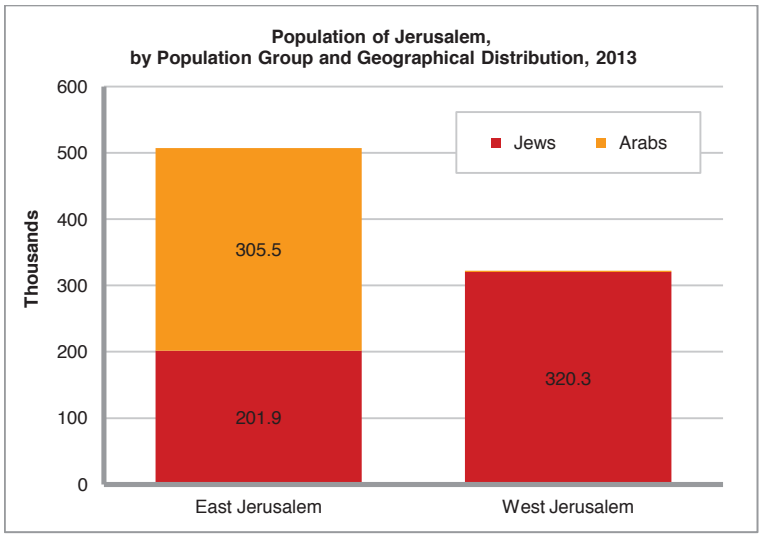


Over the years, there has also been a rise in the percentage of Jewish residents in relation to the total number of residents in areas added after 1967: in 1972, Jewish residents represented 10%, in 1983 they were 39%, and by 1996 the figure had grown to 46%. However, since 1997, there has been a gradual decrease in the proportion of Jewish residents in these areas, and in 2013 the figure stood at 40%. This decrease stems from a higher growth rate on the part of the Arab population in these areas as compared with the Jewish population.

In 2013, residents of the large Jewish neighborhoods (satellite neighborhoods) that were built in areas added to the city after 1967 numbered 43,300 residents in Ramot Alon,

40,800 in Pisgat Ze'ev, 29,900 in Gilo, 20,700 in Neve Ya'akov, 18,100 in Har Homa, 15,100 in Ramat Shlomo, and 13,900 in East Talpiot.

In all, 305,500 Arabs resided in areas added to Jerusalem after 1967, constituting 60% of the total population of these areas and 99% of the Arab population of the city in 2013. The 2013 Arab population in the largest Arab neighborhoods was distributed as follows: 35,800 in Beit Hanina, 28,200 in the Muslim Quarter of the Old City, 24,600 in Ras El-Amud, 24,300 in A-Tur and the slopes of the Mount of Olives, 22,800 in Shuafat, and 22,600 in Jabel Mukaber.



Jewish population in satellite neighborhoods of Jerusalem, 1985-2013

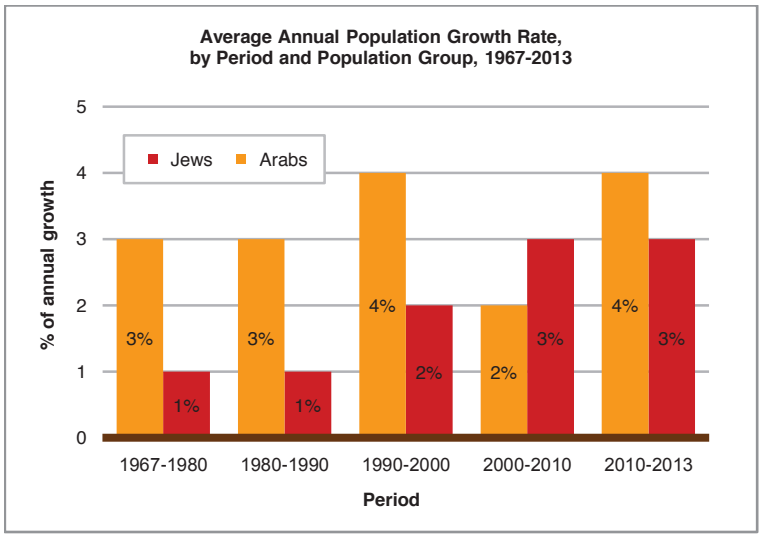
	1985	1992	2000	2006	2013
Pisgat Ze'ev	14,800	29,400	36,500	41,900	40,800
Neve Ya'akov			20,300	20,200	20,700
Ramot Alon	20,100	38,100	37,900	41,400	43,300
Gilo	23,900	30,400	27,600	27,100	29,900
East Talpiot	11,800	15,200	12,800	12,200	13,900

Population growth

During 2013 the population of Jerusalem increased by 14,600 residents. The increase in the number of Arab residents of the city (7,500 additional persons) is greater than the increase in the number of Jewish residents (7,100 additional persons). The total population of Jerusalem grew by 1.8%, with the Jewish population growing by 1.4% and the Arab population growing by 2.5%. These data indicate that the increase in the Arab population is greater than that of the Jewish population in both relative and absolute terms.

At the same time, it should be noted that recent years have shown a decrease in the growth rate of the Arab population, while the growth rate of the Jewish population has remained steady with a slight upward trend.

In 2013 Jerusalem's population growth rate (1.8%) was comparable to that of Israel (1.9%) and higher than those of Tel Aviv (1.0%) and Haifa (0.4%). The Jewish population growth rate in Jerusalem (1.4%) was lower than the Jewish population growth rate for Israel (1.8%) and higher than the figure for Tel Aviv (0.9%) and Haifa (0.4%). Within the Arab population, in contrast, the population growth rate in Jerusalem (2.5%) was slightly higher than the population growth rate for Israel (2.2%).



Between 1967 and 2013, the population of Jerusalem increased by a factor of 3.1: the Jewish population increased by a factor of 2.6, while the Arab population increased by a factor of 4.5. In the same years, the population of Israel increased by a factor of 2.9: the Jewish population by a factor of 2.7 and the Arab population by a factor of 4.3.

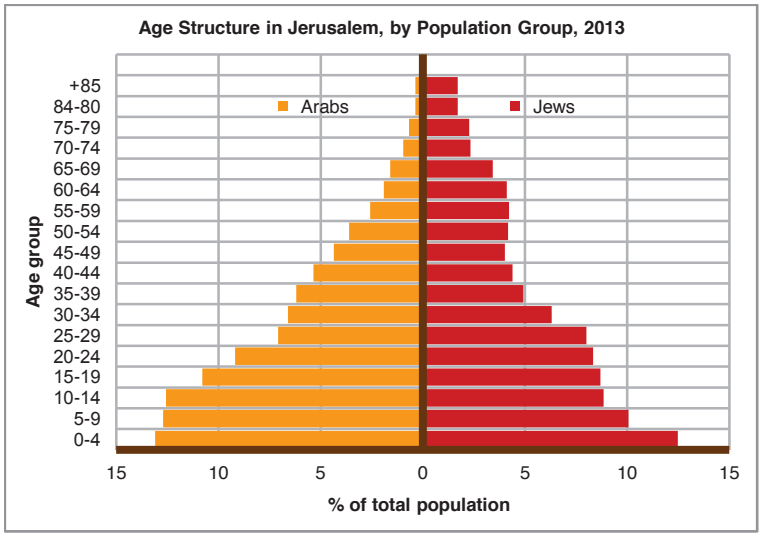
Population age

The population of Jerusalem is characterized by its relative youth. In 2013, the median age of residents was 24 (that is, half the population was younger than 24 and half was older than 24). In comparison, the populations of Tel Aviv and Haifa were significantly older than Jerusalem's, with median ages of 35 and 38, respectively. The median age of Israel's total population was 30. The low median age in Jerusalem stems from the large proportion of the city's ultra-orthodox and Arab population groups: these groups are characterized by a particularly young age structure because of the large number of children per family.

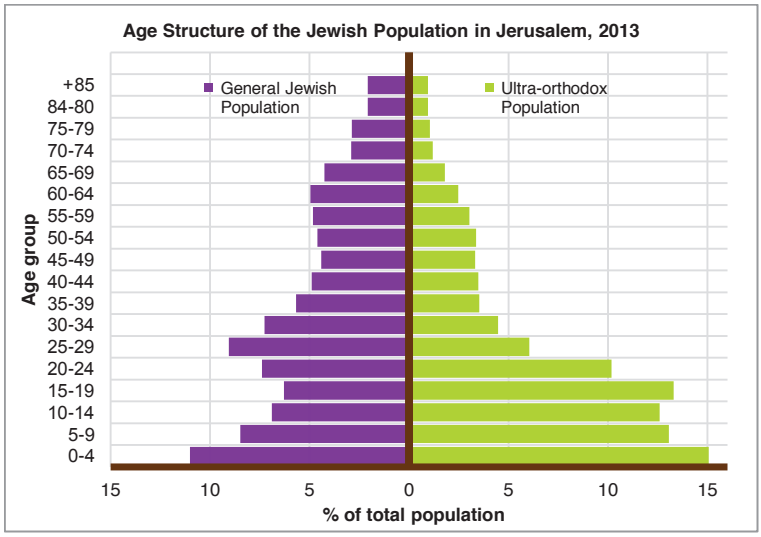
The Jewish population of Jerusalem is older than the Arab population. In 2013 the median age of the Jewish population was 26, compared with 20 for the Arab population. In Israel generally, the median age of the Jewish population was 32 and that of the Arab population was 22.

Jerusalem is characterized by a relatively large proportion of children (ages 0-14) and a relatively small proportion of senior citizens (65 and older). In 2013 children constituted 34% of the total population of Jerusalem, compared with 18% in Tel Aviv, 19% in Haifa, and 28% in Israel. Within Jerusalem's Jewish population, children constituted 31%, compared with 38% within the Arab population.

The proportion of senior citizens (65 and older) in Jerusalem was relatively low. Members of this age group accounted for 9% of Jerusalem's total population, while the proportion was 15% in Tel Aviv, 19% in Haifa, and 11% in Israel at large. They accounted for 11% of the Jewish population of Jerusalem, as compared with only 4% within the Arab population.

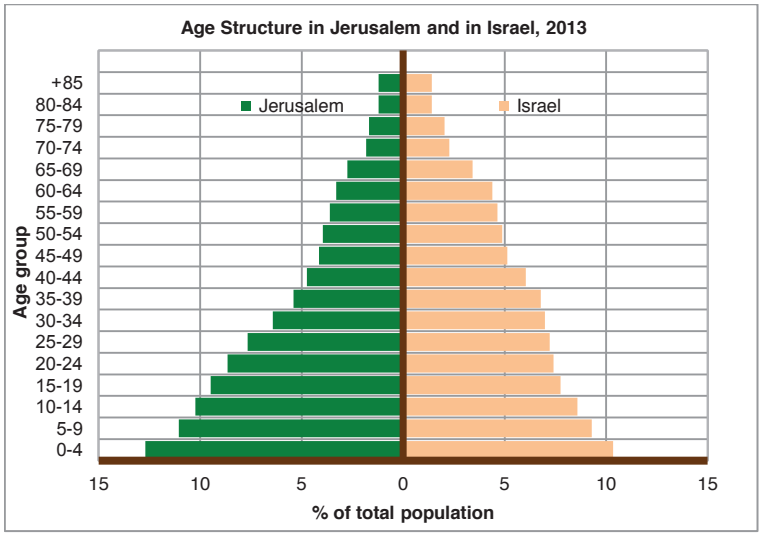


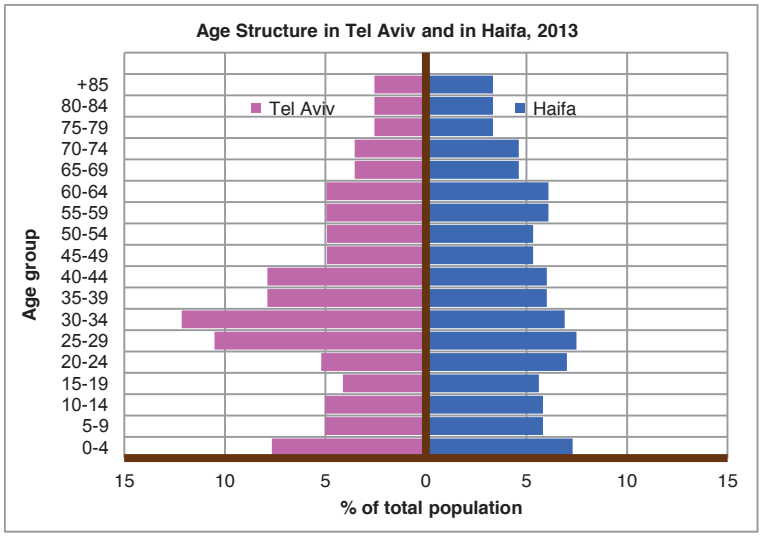
The ultra-orthodox Jewish population[4] is characterized by its very young age structure, which is even younger than that of the Arab population. Within the ultra-orthodox population, the percentage of children (aged 0-14) was 41%, compared with 26% in the general Jewish population (secular, traditional, and religiously observant[5]). The proportion of senior citizens (65 and older) in the ultra-orthodox population was only 6%, compared with 14% in the general Jewish population. The Arab Muslim population of Jerusalem is also characterized by its young age structure and is significantly younger than the Arab Christian population. Children (aged 0-14) accounted for 39% of the Muslim population and 22% of the Arab Christian population. Senior citizens (65 and older) accounted for only 4% of the Muslim population and 14% of the Arab Christian population.



[4] This refers to the Jewish population that resides in neighborhoods where most residents are ultra-orthodox (ultra-orthodox degree of homogeneity at 1-5). These neighborhoods were determined by the percentage of votes for ultra-orthodox parties in the elections to the 19th Knesset (Israeli parliament) in 2013. See Population Distribution by Ultra-Orthodox Degree of Homogeneity – 2013.

[5] This refers to the Jewish population living in neighborhoods in which most of the residents are secular, traditional, or religiously observant. These include all Jewish areas that do not have an ultra-orthodox degree of homogeneity of 1-5.


Age Structure in Jerusalem and in Israel, 2013
Jerusalem
Israel
Age group
+85
80-84
75-79
70-74
65-69
60-64
55-59
50-54
45-49
40-44
35-39
30-34
25-29
20-24
15-19
10-14
5-9
0-4
15
10
5
0
5
10
15
% of total population

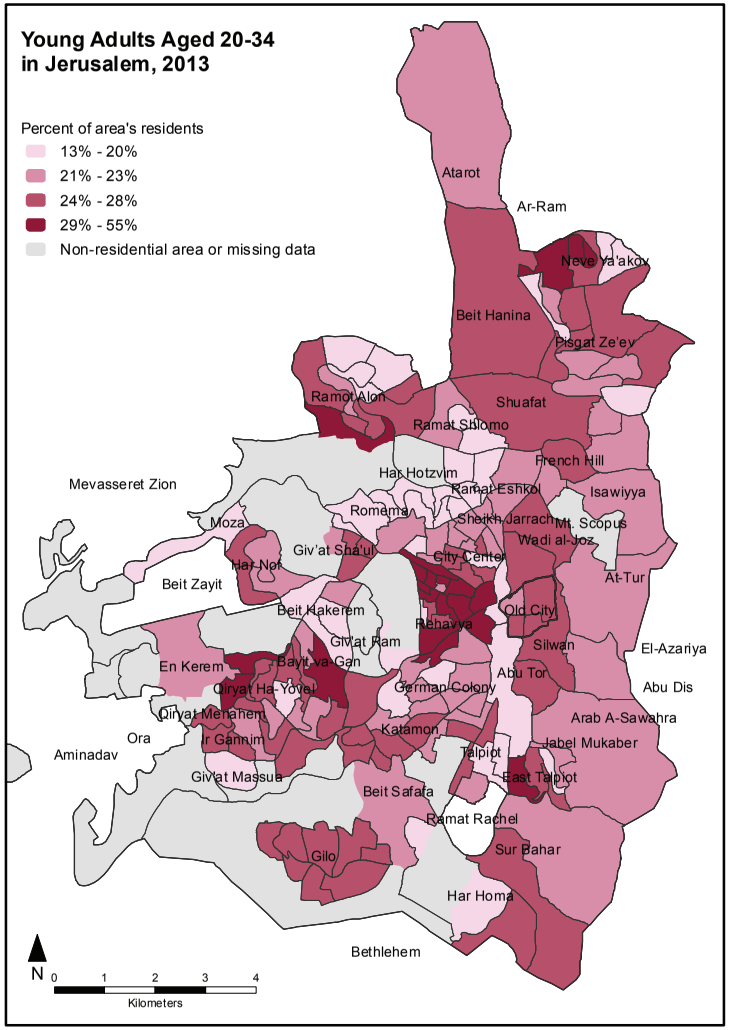

Age Structure in Tel Aviv and in Haifa, 2013
Tel Aviv
Haifa
Age group
+85
80-84
75-79
70-74
65-69
60-64
55-59
50-54
45-49
40-44
35-39
30-34
25-29
20-24
15-19
10-14
5-9
0-4
15
10
5
0
5
10
15
% of total population

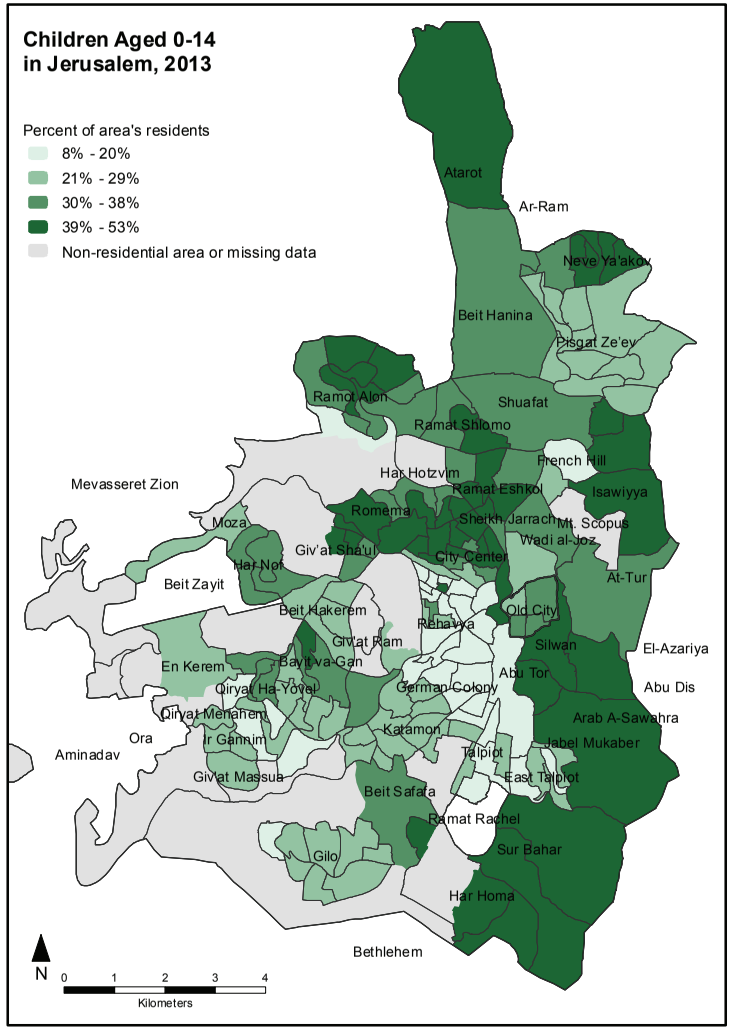
Population of Jerusalem by age and population group, 2013

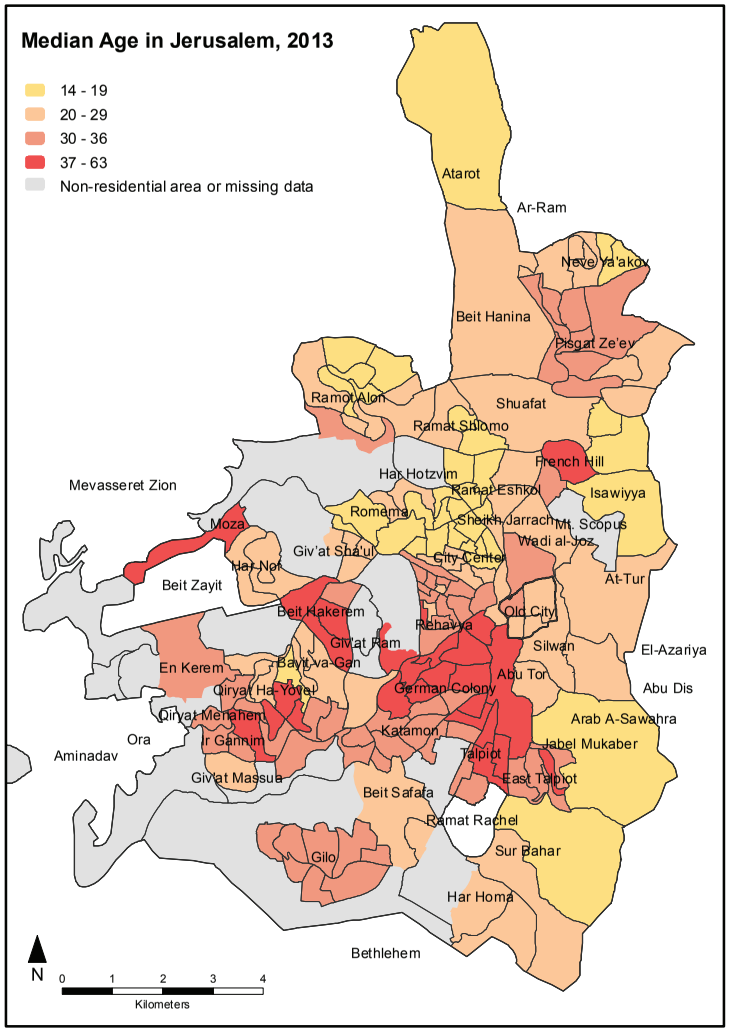
	Children (aged 0-14)	Senior Citizens (aged 65 and older)	Median age*
Total population	**34%**	**9%**	**24**
Jewish population	**31%**	**11%**	**26**
General Jewish population (secular, traditional and religiously observant)[4]	26%	14%	31
Ultra-orthodox Jewish population[3]	41%	6%	18
Arab population	**38%**	**4%**	**20**
Arab Muslims	39%	4%	20
Arab Christians	22%	14%	34
Non-Arab Christians	**17%**	**20%**	**43**

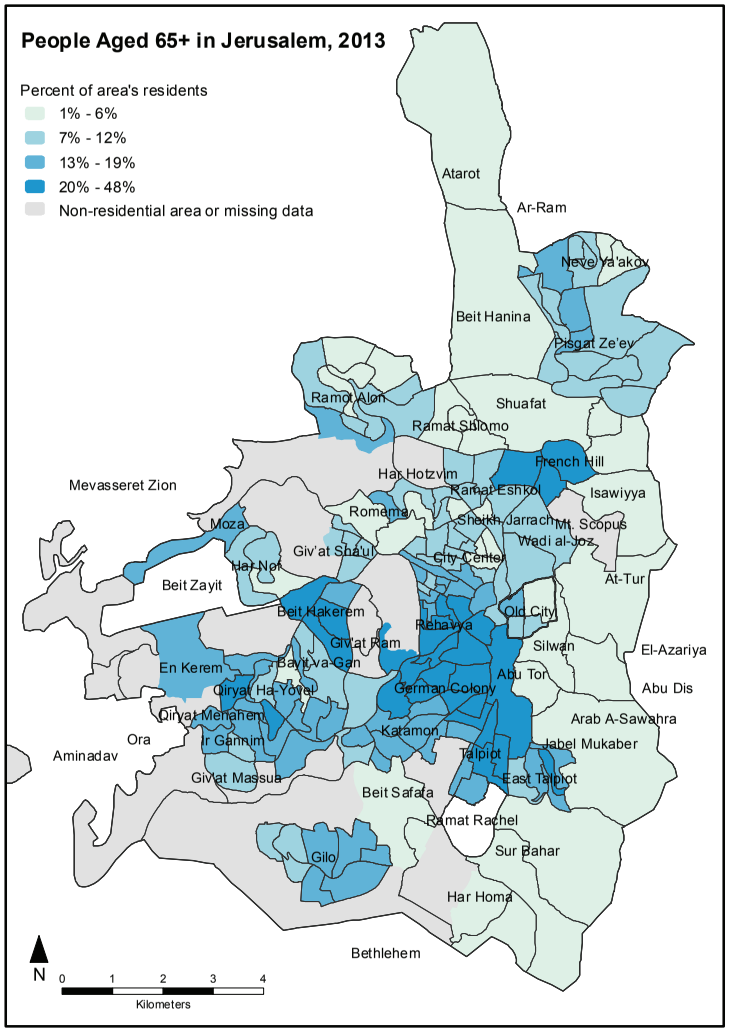
* The age at which half the population is older and half is younger.

In 2013 the population group with the oldest age structure in Jerusalem was the non-Arab Christian population. This group numbered 3,000 residents, with a median age of 43 years. The Arab Christian population is also relatively old, with a median age of 34 years. The youngest population groups were the ultra-orthodox Jewish population, whose median age was 18 years and the Muslim Arabs, with a median age of 20 years.


Young Adults Aged 20-34
in Jerusalem, 2013
Percent of area's residents
13% - 20%
21% - 23%
24% - 28%
29% - 55%
Non-residential area or missing data
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrah
Mt. Scopus
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Har Nof
At-Tur
Beit Zayit
Beit Hakerem
Old City
Rehavya
Giv'at Ram
Silwan
El-Azariya
Bayt va-Gan
En Kerem
Abu Tor
Qiryat Ha-Yovel
German Colony
Abu Dis
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Talpiot
Jabel Mukaber
Aminadav
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers


Children Aged 0-14
in Jerusalem, 2013
Percent of area's residents
8% - 20%
21% - 29%
30% - 38%
39% - 53%
Non-residential area or missing data
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrah
Mt. Scopus
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Har Nof
At-Tur
Beit Zayit
Beit Hakerem
Old City
Rehavya
Giv'at Ram
Silwan
El-Azariya
Bayt va-Gan
En Kerem
Abu Tor
Qiryat Ha-Yovel
German Colony
Abu Dis
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Talpiot
Jabel Mukaber
Aminadav
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers

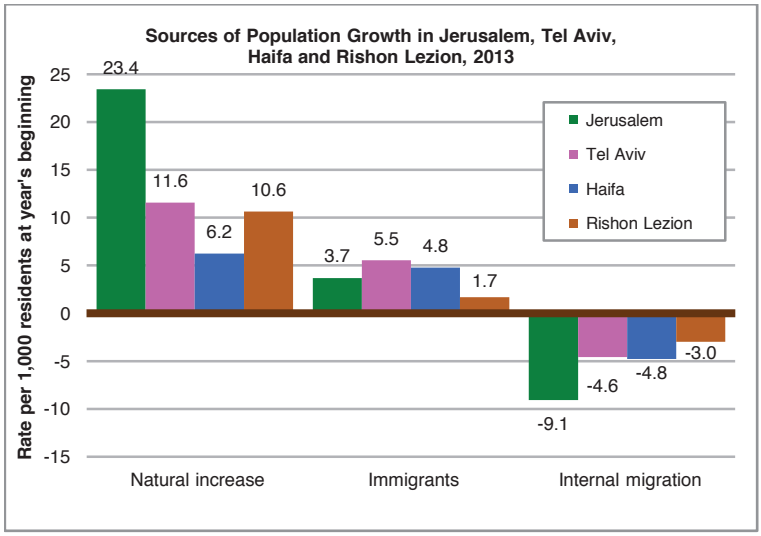

Median Age in Jerusalem, 2013
14 - 19
20 - 29
30 - 36
37 - 63
Non-residential area or missing data
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrach
Mt. Scopus
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Har Nof
At-Tur
Beit Zayit
Old City
Beit Hakerem
Rehavya
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit Va-Gan
Abu Tor
German Colony
Abu Dis
Qiryat Ha-Yovel
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Jabel Mukaber
Aminadav
Talpiot
East Talpiot
Giv'at Massua
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers


People Aged 65+ in Jerusalem, 2013
Percent of area's residents
1% - 6%
7% - 12%
13% - 19%
20% - 48%
Non-residential area or missing data
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrach
Mt. Scopus
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Har Nof
At-Tur
Beit Zayit
Old City
Beit Hakerem
Rehavya
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit Va-Gan
Abu Tor
German Colony
Abu Dis
Qiryat Ha-Yovel
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Jabel Mukaber
Aminadav
Talpiot
East Talpiot
Giv'at Massua
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers

- Sources of Population Growth -

Three factors contribute to population growth:

- Natural increase – the difference between the number of births and the number of deaths;
- Internal migration – the difference between the number of new residents moving to Jerusalem from other localities in Israel and the number of those leaving Jerusalem for other localities in Israel;
- Aliya (Jewish immigration) – new immigrants who choose Jerusalem as their first place of residence in Israel.



Births

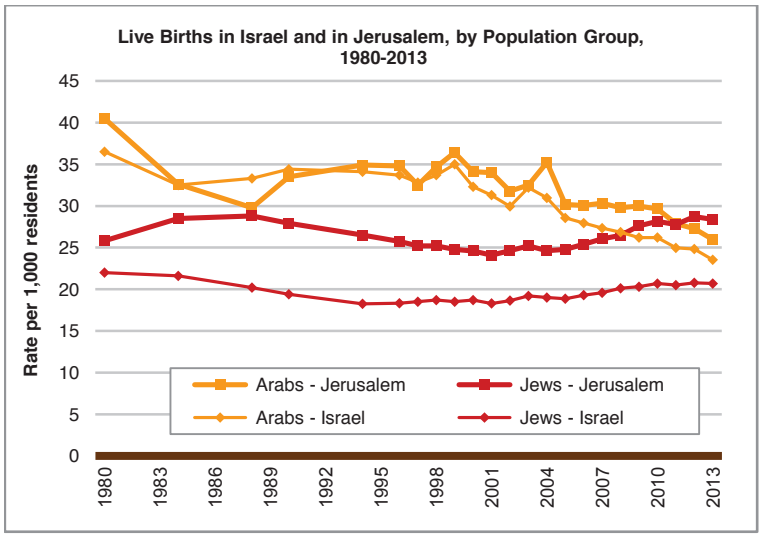
During 2013 a total of 22,600 infants were born to Jerusalem residents: 14,700 (65%) to Jewish families and 7,900 (35%) to Arab families.

Jerusalem is characterized by high birth rates, particularly among the ultra-orthodox and the Muslim Arab population groups. In 2013 the birth rate in Jerusalem was 27.5 births per 1,000 persons, which is higher than the average for Israel, at 21.3 births per 1,000 persons. The birth rate of the Jewish population was higher than that of the Arab population. In 2013 the birth rate within the Jewish population of Jerusalem was 28.4 births per 1,000 persons (20.7 births per 1,000 persons within the overall Jewish population of Israel). Within the Arab population of Jerusalem the birth rate was 26.0 births per 1,000 persons (23.5 births per 1,000 persons within the overall Arab population of Israel). Until 2010

the birth rate in the Arab population was higher than that in the Jewish population and in 2011 it was almost the same, but in 2012 this trend was reversed and the birth rate of the Jewish population exceeded that of the Arab population.

From the 1970s through the end of the first decade of the twenty-first century there was a gradual decline in the birth rate within the Jewish population of Jerusalem. The average birth rate of the Jewish population dropped from 27.7 births per 1,000 persons during the years 1973-1989 to 25.7 during the years 1990-1999. During the years 2000-2009 the average birth rate remained comparable, at 25.3. In recent years, however, there has been an increase in the birth rate within the Jewish population, with an average of 28.2 for the years 2010-2013, which is higher than the recorded average for the 1970s.

Over the years there has been a sharp decline in the birth rate within the Arab population of Jerusalem. During 1973-1979, the average birth rate within this sector was 42.5 births per 1,000 persons. This figure fell to 32.9 during the years 1980-1989 and rose slightly to 34.1 in the 1990s. Since the turn of the century, however, there has again been a decline: in the years 2000-2009 the average birth rate stood at 31.8, and in 2010-2013 it dropped to 27.7.



Birth rates are a function of age structures and fertility patterns. Fertility patterns are influenced primarily by cultural characteristics, level of education, and labor force participation rate.

Birth rates in Jerusalem vary by neighborhood, in accordance with the age structure and characteristics of the population. The Jewish neighborhoods that recorded the highest birth rates for 2013 were ultra-orthodox: Mea She'arim and Batei Ungarin (55 births per 1,000 persons), Zichron Moshe (50), Beit Israel Hayeshana (50), Nahalat Tzadok and Sha'arei Hesed (46), and Mekor Baruch (46). Among general Jewish (non-ultra-orthodox)

neighborhoods, the highest birth rates were recorded in Kiryat Moshe (40 births per 1,000 persons), Giv'at Mordechai (39), Zichron Tuvya and Nahalat Zion (33) and Musrara (29).

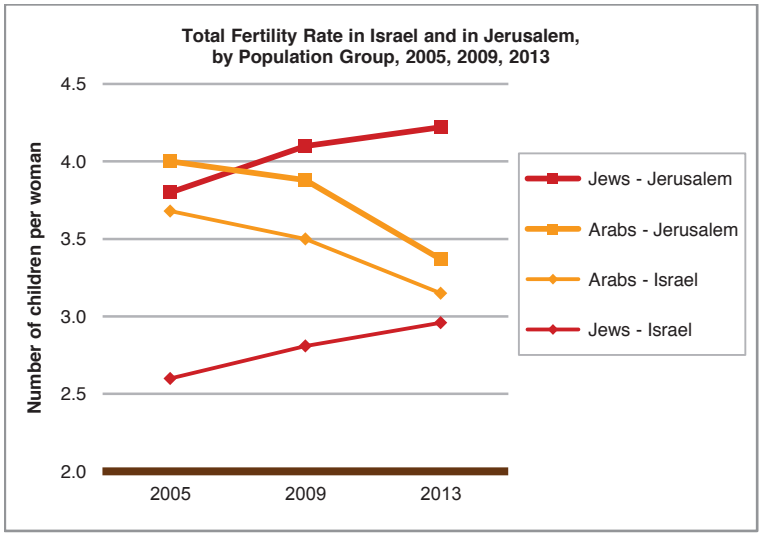
The neighborhoods that recorded the lowest birth rates were as follows: the City Center – Nahalat Shiv'a and the area of King George and Ben Yehuda streets (8 births per 1,000 persons), Arnona and southern Talpiot (8), and Malha, the Independence Park area, and Giv'at Massua (11 each).

Among Arab neighborhoods the highest birth rates were recorded in New Anata (39 births per 1,000 persons), Kafr 'Akb and Atarot (35), Shuafat refugee camp (33), Sur Bahar (31), and Jabel Mukaber (30). The neighborhoods with the lowest birth rates were the Christian Quarter of the Old City (11), Bab A-Zahara and Masudiya (17), and the Armenian Quarter of the Old City (20).

In 2013 the overall fertility rate (the number of expected births during a woman's lifetime) in Jerusalem was 3.9, significantly higher than the rates for Tel Aviv and Haifa (2.1 and 2.3, respectively) or Israel at large (3.0).

The overall fertility rate of Jewish women in Jerusalem for 2013 was 4.2 (3.0 for Israel at large), higher than the overall fertility rate among the Arab women of Jerusalem, at 3.4 (3.2 for Israel at large). The principal contributing factor to the high overall fertility rate among Jewish women is the high overall fertility rate among ultra-orthodox women and the relatively high fertility rate among religiously observant women. Among the Muslim women of Jerusalem, the overall fertility rate was 3.5 children in 2013, similar to the overall fertility rate among Muslim women in Israel, which stood at 3.4.

In recent years there has been an increase in the fertility rates of Jewish women, both in Jerusalem and in Israel, while fertility rates among Muslim women have declined.



In 2005, the overall fertility rate of Jewish women in Jerusalem was 3.8, rising to 4.2 in 2013. Fertility rates among Jewish women in Israel at large also rose during these years, from 2.6 to 3.0. A reverse trend is evident within the Muslim population of Jerusalem, where the fertility rate declined during these years, from 4.1 to 3.5.

Mortality

In 2013 there were 3,400 deaths of Jerusalem residents: 78% of these were Jews and 22% Arabs. The mortality rate for Jerusalem – 4.1 deaths per 1,000 persons – was lower than the figures for Israel (5.2), Tel Aviv (8.0), and Haifa (9.1). This disparity is attributable to Jerusalem's relatively young population.

The mortality rate within the Arab population of Jerusalem is significantly lower than the rate within the Jewish population. In 2013 the mortality rate of the Jewish population in Jerusalem was 5.1 deaths per 1,000 persons (compared with 5.8 deaths per 1,000 among the Jewish population of Israel, 8.1 in Tel Aviv, and 9.7 in Haifa). This was double the rate for the Arab population of Jerusalem, at 2.5 deaths per 1,000 persons. (2.7 among the Arab population in Israel).

Over the years the mortality rate of Jerusalem's Jewish population has declined steadily, whereas that of the Arab population has dropped sharply and rapidly. The average mortality rate within the Jewish population fell from 6.4 deaths per 1,000 persons during the years 1973-1979 to 5.9 during the years 1980-1989, to 5.5 during the years 1990-1999, and to 5.2 during 2000-2009, a rate that remained steady during 2010-2013. Within the Arab population the average mortality rate dropped from 6.4 deaths per 1,000 persons during the years 1973-1979,[6] to 4.5 during the years 1980-1989, to 3.5 during 1990-1999, to 2.8 during 2000-2009, and it continued to decline during the years 2010-2013, reaching 2.6.

One of the principal explanations for the significant decline in the mortality rate of the Arab population is a sharp decline in the infant mortality rate. During the years 1972-1979, the average infant mortality rate within the Arab population of Jerusalem was 45.2 deaths per 1,000 live births. The rate fell to 17.2 in the period 1980-1989, to 10.7 in 1990-1999, to 6.7 in 2000-2009, and to 5.9 during the years 2011-2013.

During the years 2011-2013 the average infant mortality rate within the Jewish population of Jerusalem was 2.9 (2.6 within the Jewish population of Israel), while within the Arab population the rate was 5.9 (6.5 within the Arab population of Israel). The higher infant mortality rate within the Arab population is primarily a result of birth defects and genetic diseases[7] that occur relatively frequently within the Muslim population because of inbreeding and premature births.

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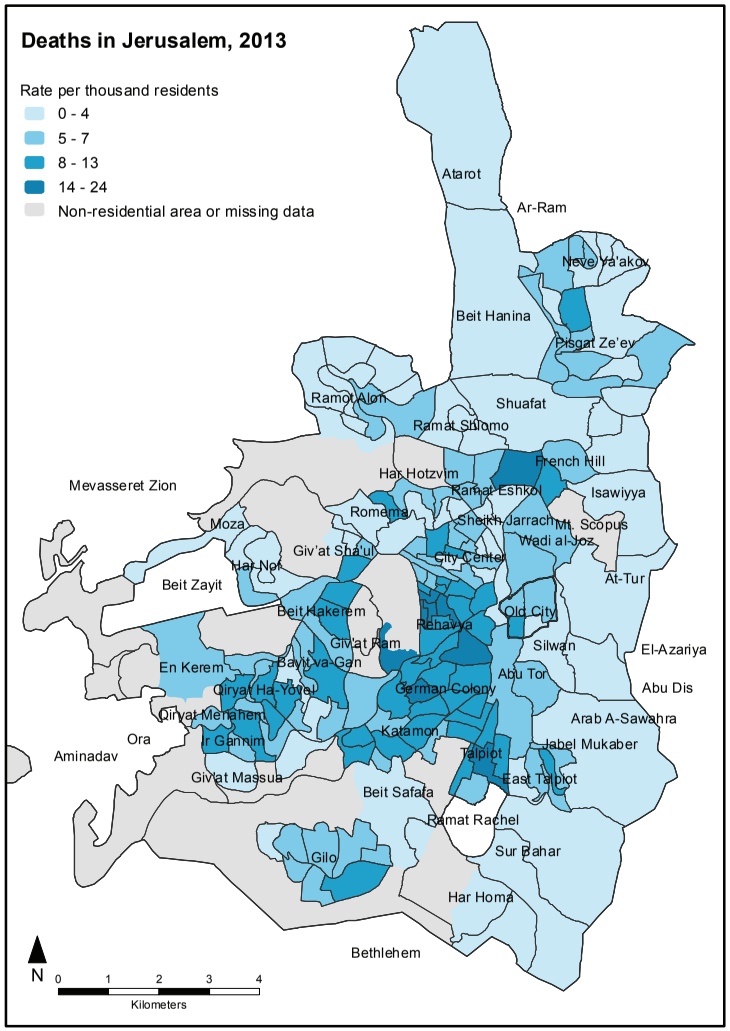
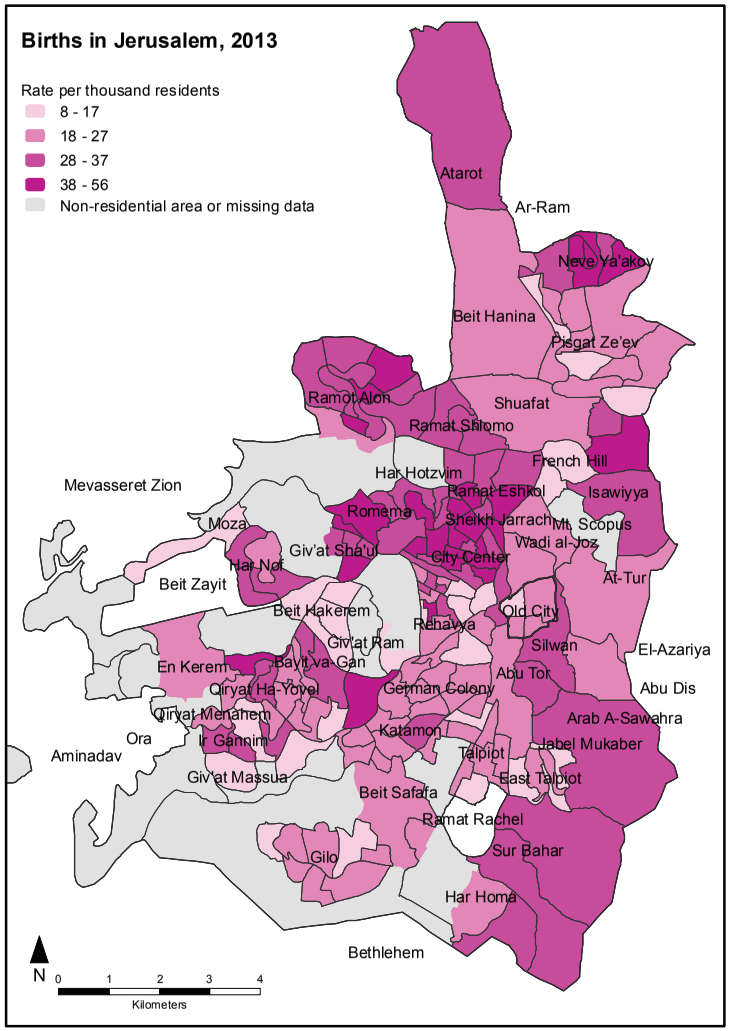
[6] It should be noted that during these years the mortality rates for Jerusalem's Arab population dropped from 7.3 deaths per 1,000 persons in 1973 to 5.3 deaths in 1979. Within the Jewish population mortality rates dropped from 6.8 to 6.0 during those years.

[7] See the Ministry of Health report on infant mortality and prenatal mortality in Israel for 2008-2011 (in Hebrew), http://www.health.gov.il/PublicationsFiles/Infant_mortality_rate-2008-2011.pdf.


Deaths in Jerusalem, 2013
Rate per thousand residents
0 - 4
5 - 7
8 - 13
14 - 24
Non-residential area or missing data
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrach
Mt. Scopus
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Har Nof
At-Tur
Beit Zayit
Old City
Beit Hakerem
Rehavya
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit va-Gan
Abu Tor
Qiryat Ha-Yovel
German Colony
Abu Dis
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Talpiot
Jabel Mukaber
Aminadav
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers


Births in Jerusalem, 2013
Rate per thousand residents
8 - 17
18 - 27
28 - 37
38 - 56
Non-residential area or missing data
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrach
Mt. Scopus
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Har Nof
At-Tur
Beit Zayit
Old City
Beit Hakerem
Rehavya
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit va-Gan
Abu Tor
Qiryat Ha-Yovel
German Colony
Abu Dis
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Talpiot
Jabel Mukaber
Aminadav
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers

The decreased mortality rates within the Arab population of Jerusalem are the result of improvements in sanitation, healthcare, and preventive medicine during the 1970s and 1980s, as well as improvements stemming from implementation of the National Health Insurance Law beginning in the mid-1990s. Another reason for the relatively low mortality rates is that the Arab population is young. In 2013 the proportion of children (aged 0-14) within the Arab population stood at 38% (31% within the Jewish population), whereas the proportion of seniors (aged 65 and older) was only 4% (12% within the Jewish population). Seniors aged 75 and above constituted 1% of the Arab population compared with 6% of the Jewish population.

The highest mortality rates were recorded in the older, longstanding neighborhoods of Jerusalem, where the population comprises mostly general Jewish residents (secular, traditional, and religiously observant) and the percentage of children is relatively low while the percentage of seniors aged 65 and over is relatively high. The neighborhoods that recorded the highest mortality rates were Kiryat Wolfson (24 death per 1,000 persons), Nahalat Tzadok and Sha'arei Hesed (15), Nahalat Ahim (15), and Nayot (15).

Among Arab neighborhoods, the highest mortality rates were recorded in the Armenian Quarter of the Old City (10 deaths per 1,000 persons), the Christian Quarter of the Old City (7), Bab A-Zahara and Masudiya (4), and Wadi al-Joz and Sheikh Jarrah (4). Evidently, mortality rates in Arab neighborhoods were significantly lower than those in Jewish neighborhoods. The reason for this is that the Arab population is younger than the Jewish population.

Natural increase

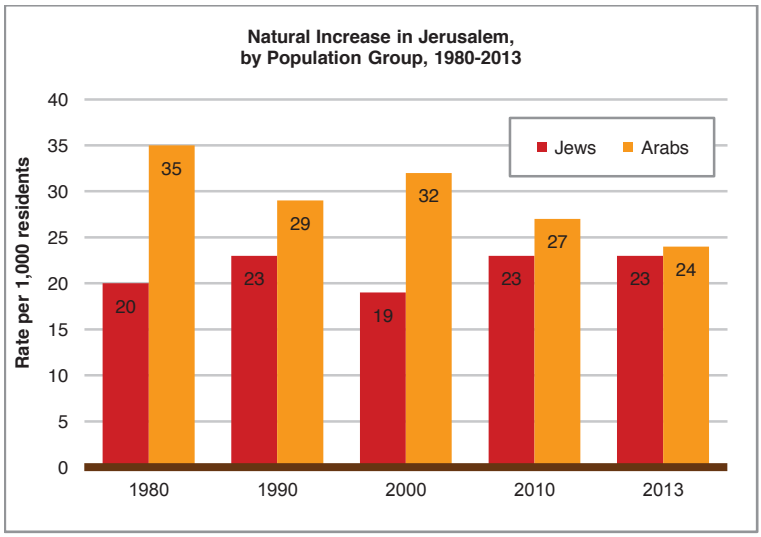
Natural increase (the difference between the number of births and the number of deaths) is the principal factor in the growth of Jerusalem's population. In 2013 natural increase resulted in the addition of 19,100 persons to the population of Jerusalem: 63% Jews and 37% Arabs. The rate of natural increase in Jerusalem for 2013 (23.2 per 1,000 persons) was significantly higher than the rate for Israel at large (16.0), Tel Aviv (11.5), and Haifa (6.2).

The rate of natural increase of the Arab population in Jerusalem is slightly higher than that of the Jewish population. In 2013 the rate was 23.1 per 1,000 persons for the Jewish population and 23.7 for the Arab population. At the same time, the rate of natural increase for the Jewish population of Jerusalem was significantly higher than the rate for Israel at large: 23.1 and 14.8, respectively. Likewise, the rate of natural increase among the Arab population of Jerusalem (23.7) was higher than the rate for Israel at large (20.8) although the discrepancy is smaller.

Since the 1970s there has been a decline in the natural rate of increase in Jerusalem for both the Jewish and the Arab populations. The drop within the Jewish population was moderate: during the years 1973-1979 and 1980-1989, the average rate of natural increase within the Jewish population was 21.3 and 21.8 per 1,000 persons, respectively. It fell to

20.3 during the years 1990-1999 and remained comparable during the years 2000-2009 (20.0). During the years 2010-2013 the average rate of natural increase among the Jewish population in the city rose to 23.0.

Within the city's Arab population, in contrast, the rate of natural increase has dropped sharply. During the 1970s the average rate was 36.2 per 1,000 persons. It fell to 28.5 during the 1980s, rose slightly to 30.3 in the 1990s, and dropped to 29.0 during the decade 2000-2009. The downward trend continued during the years 2010-2013, with an average rate of 25.2.



Aliya (Jewish immigration)[8]

In 2013 a total of 2,300 new immigrants to Israel settled in Jerusalem, which was higher than the figures for Tel Aviv (1,500) and Haifa (1,100). About 13% of all new immigrants to Israel in 2013 settled in Jerusalem, higher than the figures for Tel Aviv (9%) and Haifa (6%).

During the years 2010-2013 immigrants to Jerusalem constituted approximately 14% of all new immigrants to Israel (and 7% in the years 1990-2001), compared with 7% for Tel Aviv and 6% for Haifa (and 10% in 1990-2001 for Tel Aviv and Haifa). In the years 2010-2013, the five countries from which the highest percentages of immigrants arrived were the United States (32%), France (20%), Russia (10%), and Great Britain (8%).

In the past decade the number of new immigrants to Israel has declined significantly. In 2002 there were 33,600 immigrants; the number dropped to 21,200 in 2005 and to

[8] This does not include returning citizens of Israel who had previously emigrated.

16,900 in 2013. In contrast to the trend in Israel, the number of immigrants to Jerusalem has remained relatively steady at an average of 2,500 per year during the years 2002-2007 and an average of 2,300 per year during the period 2008-2013.

Jerusalem has a relatively weak power of attraction for immigrants with limited resources. Consequently, during the years when most of the immigrants to Israel came from the former Soviet Union, the proportion of immigrants choosing to live in Jerusalem was low – some 7%. From 2002 onward there was a significant increase in the proportion of immigrants choosing Jerusalem as their initial place of residence in Israel, as a result of an increase in the proportion of immigrants arriving from prosperous countries (largely the United States and Western Europe).

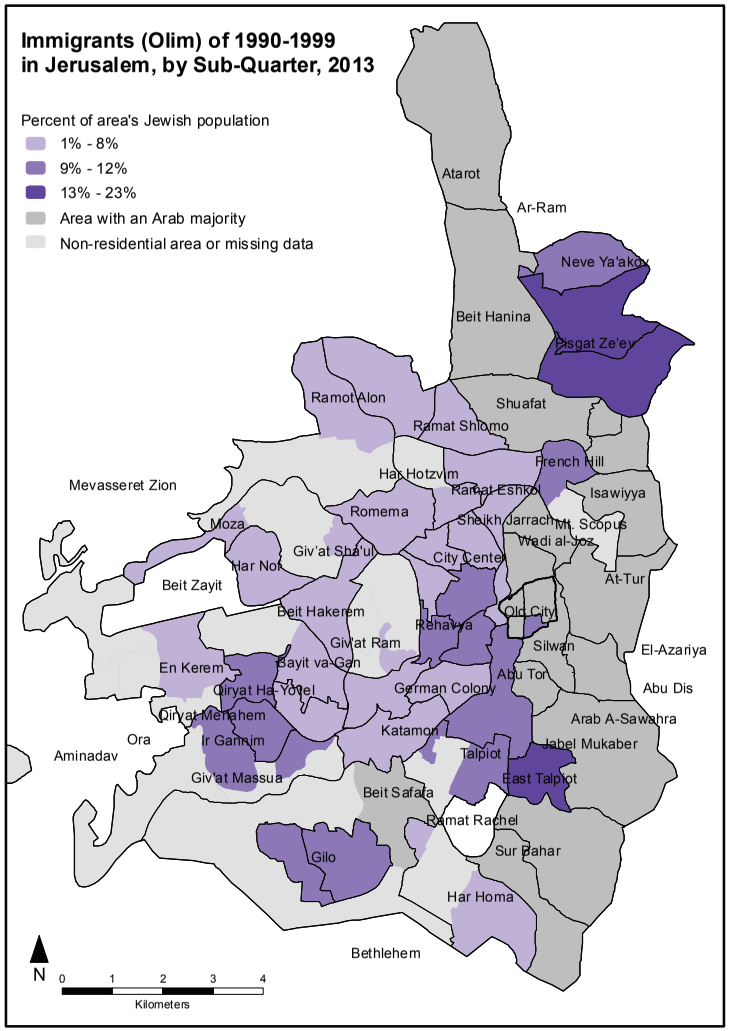
In 2013 those residents of Jerusalem who had immigrated to Israel during the period from 1990 onward numbered 68,000 and constituted 8% of the total population of the city and 13% of the Jewish population. Among them, 52% had immigrated during the years 1990-1999, 32% during 2000-2009, and 16% during 2010-2013. Immigrants who arrived during the period from 2000 onward comprised 6% of the total Jewish population of Jerusalem.

The proportion of Jerusalem's Jewish population that represents immigrants who arrived during the period from 1990 onward (13%) is the same as the figure for Tel Aviv (13%) but lower than the figure for Haifa (25%) and for some of the localities surrounding Jerusalem, such as Beit Shemesh (18%) and Ma'ale Adumim (16%). In Giv'at Ze'ev new immigrants constituted 8% of the total Jewish population, and in Modi'in Illit, Betar Illit, and Har Adar they accounted for 5%.

Jerusalem neighborhoods in which a relatively high number of immigrants have resided since 2000 include Pisgat Ze'ev (2,200), Bayit Vagan (2,000), Talpiot, Arnona, and Mekor Haim (1,900), Katamon Aleph to Katamon Tet (1,700), and East Talpiot (1,500). As a percentage of the neighborhood's Jewish population, a particularly high proportion of immigrants who have arrived since 2000 was recorded in Talbiya (19%), the City Center and Rehavya (15% each), and the German Colony and Old Katamon, Bak'a and Abu Tor, and Talpiot, Arnona, and Mekor Haim (13% each).

The Jerusalem neighborhoods with a relatively high number of immigrants who had arrived during the years 1990-1999 were Pisgat Ze'ev (6,400), Gilo (2,800), Neve Ya'akov (2,400), Katamon Aleph to Katamon Tet (1,700), Ramot Alon (1,700), Talpiot, Arnona, and Mekor Haim (1,600), and East Talpiot (1,600). As a percentage of the neighborhood's Jewish population, a particularly high proportion of immigrants who had arrived during the years 1990-1999 was recorded in Pisgat Ze'ev (17%),[9] East Talpiot (13%), Neve Ya'akov (12%), and the Jewish Quarter, French Hill, and Talpiot, Arnona, and Mekor Haim (11% each).

[9] The percentage of immigrants in relation to the overall Jewish population of the neighborhood is higher in Pisgat Ze'ev North (23%) than in Pisgat Ze'ev East (13%).


Immigrants (Olim) of 1990-1999
in Jerusalem, by Sub-Quarter, 2013
Percent of area's Jewish population
1% - 8%
9% - 12%
13% - 23%
Area with an Arab majority
Non-residential area or missing data
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Moza
Sheikh Jarrach
Mt. Scopus
Wadi al-Joz
Giv'at Sha'ul
City Center
Har Nof
At-Tur
Beit Zayit
Old City
Beit Hakerem
Rehavya
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit va-Gan
Abu Tor
Qiryat Ha-Yovel
German Colony
Abu Dis
Qiryat Menahem
Arab A-Sawahra
Katamon
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Ir Ganim
Jabel Mukaber
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Talpiot
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East Talpiot
Beit Safafa
Ramat Rachel
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Har Homa
Bethlehem
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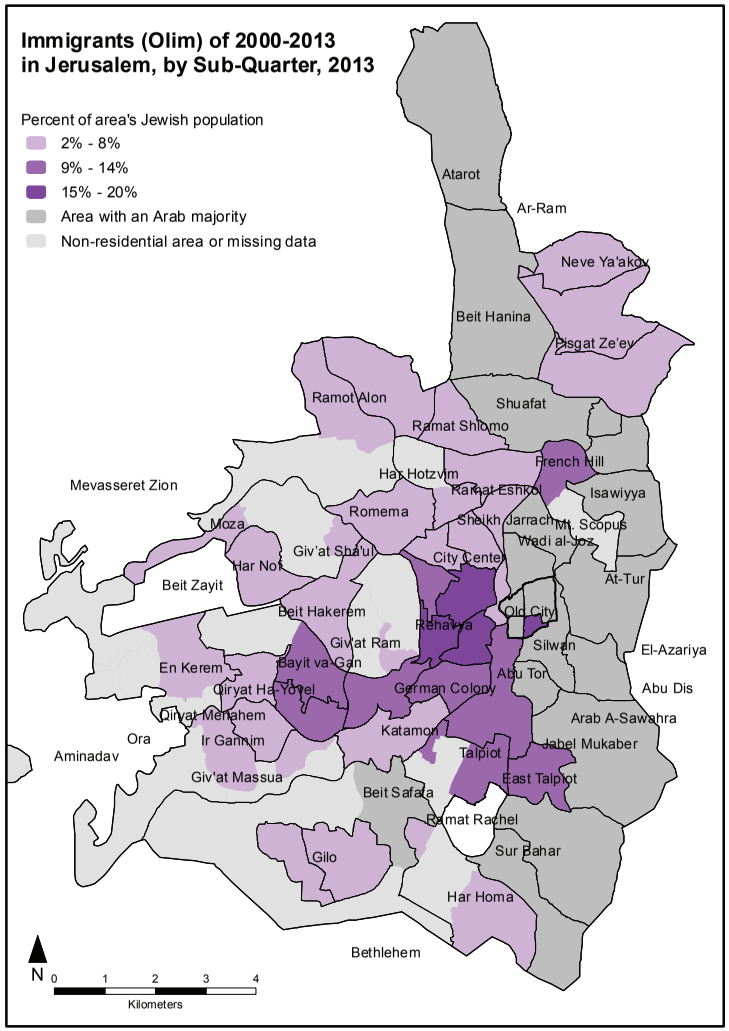
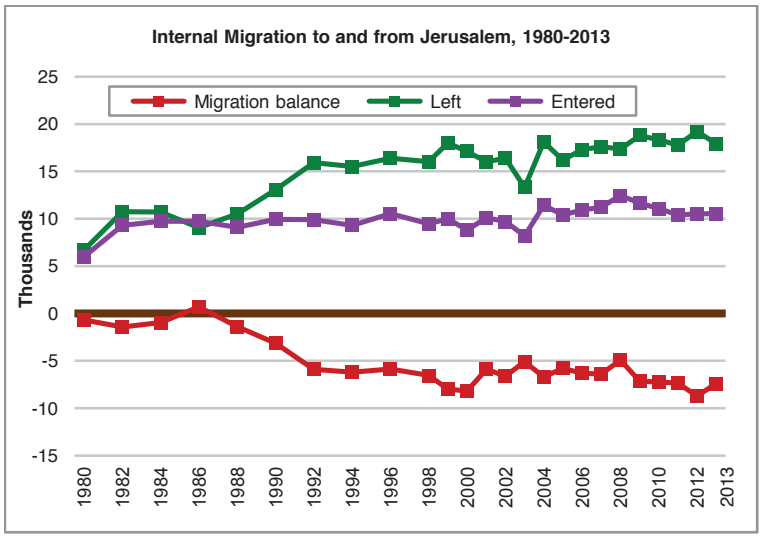
Kilometers


Immigrants (Olim) of 2000-2013
in Jerusalem, by Sub-Quarter, 2013
Percent of area's Jewish population
2% - 8%
9% - 14%
15% - 20%
Area with an Arab majority
Non-residential area or missing data
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Moza
Sheikh Jarrach
Mt. Scopus
Wadi al-Joz
Giv'at Sha'ul
City Center
Har Nof
At-Tur
Beit Zayit
Old City
Beit Hakerem
Rehavya
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit va-Gan
Abu Tor
Qiryat Ha-Yovel
German Colony
Abu Dis
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Jabel Mukaber
Aminadav
Talpiot
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers

Internal migration

The issue of internal migration receives much attention in the public discourses of Jerusalem and of Israel. It is a matter of great importance for policy and decision makers in the local, regional, and national arenas, especially in the contexts of development, branding, and localities' power of attraction. Compared with other population growth factors, a local authority's policies have tremendous potential to influence the extent of internal migration.

During 2013 a total of 17,900 residents of Jerusalem moved to other localities in Israel, and 10,500 moved to Jerusalem from elsewhere in Israel. The balance of internal migration for Jerusalem was negative, at -7,400 residents. The migrants to and from Jerusalem were, for the most part, Jews, with a small minority of Arabs[10] (3%-4%).



Migration from Jerusalem

During 2013 a total of 17,900 residents of Jerusalem left for other localities in Israel. The number of those leaving Jerusalem during this year was lower than the figure for 2012, when 19,200 residents left the city.

The Jerusalem metropolitan area (Judea and Samaria and the Jerusalem District) has a strong power of attraction for those leaving the city. In 2013, as in previous years, nearly half (48%, or 8,600 residents) of those who left Jerusalem moved to localities within the metropolitan area. One-third (33%, or 5,900 residents) of those who left moved to Tel Aviv or localities within the Tel Aviv metropolitan area (Tel Aviv District and Central District).

[10] These are actually Israeli Arabs. The Arabs of East Jerusalem do not usually report internal migration and are therefore not included in the data.

The five localities that drew the greatest numbers of residents from Jerusalem were Beit Shemesh (1,600), Tel Aviv (1,500), Betar Illit (1,100), Giv'at Ze'ev (920), and Bnei Brak (670).

The Jerusalem neighborhoods from which the largest numbers of residents left were Ramot Alon (1,500), Geula and Mea She'arim (1,100), Pisgat Ze'ev (1,100), Kiryat Moshe and Beit Hakerem (770), and Gilo (760). The highest proportions of people leaving (the number of residents leaving in relation to the size of the neighborhood's population) were recorded in Nahlaot and Zichronot (64 persons per 1,000 residents), the City Center (57), French Hill (56), Talbiya (55), Musrara (52), Rehavya (52), and Rassco and Giv'at Mordechai (52). A significant portion of these neighborhoods are populated by many young people and students. Presumably, therefore, most of those leaving Jerusalem are young people and students, Jerusalemites or others who moved to the city for their studies, resided in it for some years, and then left.

According to estimates, about 4,950 of those leaving Jerusalem (constituting 28% of all those who left the city) moved to ultra-orthodox localities or to localities with a large ultra-orthodox population. The main localities to which they moved were Beit Shemesh, Betar Illit, Bnei Brak, Modi'in Illit, and Giv'at Ze'ev.

In general, internal migrants are characterized by their youth. This is also true for Jerusalem: those moving to and from Jerusalem tend to be young. In 2013, 47% of those leaving (8,500) were aged 20-34. The main age groups leaving the city were as follows: ages 0-4 – 3,300 residents, constituting 18% of all who left; ages 20-24 – 3,200 residents (18%), and ages 25-29 – 3,200 residents (18%).

Migration to Jerusalem

In 2013 a total of 10,500 new residents moved to Jerusalem from other localities in Israel. Among these newcomers, a notable portion came from the Jerusalem metropolitan area (38% – 4,000 residents) and the Tel Aviv metropolitan area (35% – 3,700 residents).
The main localities from which new residents moved to Jerusalem in 2013 were Bnei Brak (700), Tel Aviv (610), Beit Shemesh (510), Ma'ale Adumim (450), and Betar Illit (380).

The neighborhoods to which the largest numbers of new residents moved were Ramot Alon (730), Kiryat Moshe and Beit Hakerem (580), Pisgat Ze'ev (550), Nahlaot and Zichronot (520), and Kiryat Hayovel (520). The highest proportions of newcomers (the number of new residents in relation to the size of the neighborhood's population) were recorded in the City Center (61 new residents per 1,000 residents), Nahlaot and Zichronot (57), Talbiya (55), Rehavya (55), and Nayot (43). Accordingly, the spatial distribution with respect to newcomers resembles that of departing residents, indicating active movement in neighborhoods populated by many young people and students.

According to estimates, some 2,200 of those moving to Jerusalem (constituting 21% of all newcomers) came from ultra-orthodox localities or localities with a large ultra-orthodox

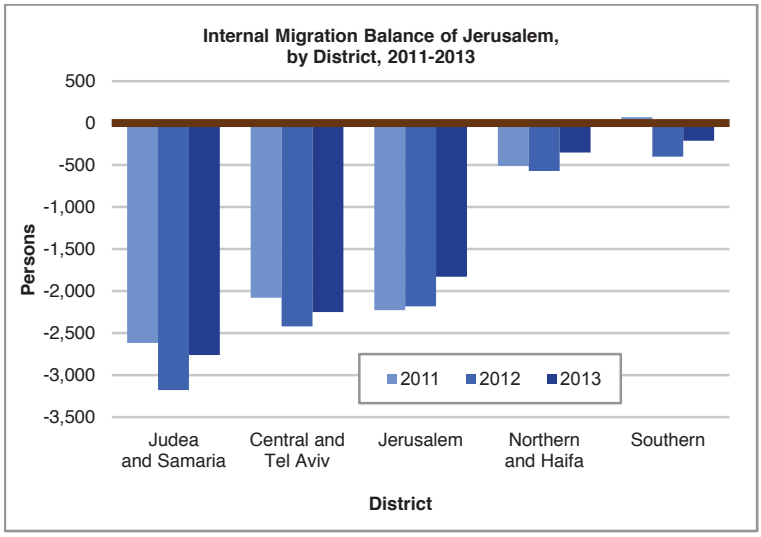
population. The main localities from which the ultra-orthodox population came were Bnei Brak, Betar Illit, Modi'in Illit, and Beit Shemesh.

Those moving to Jerusalem were young, even younger than those leaving the city. The high percentage of young newcomers is evident: 51% of new arrivals in Jerusalem (5,400) were aged 20-34. The main age groups of those migrating to the city were as follows: ages 25-29 – 2,200 residents (constituting 21% of the total); ages 20-24 – 2,000 residents (19%); and ages 0-4 – 1,300 residents (12%).

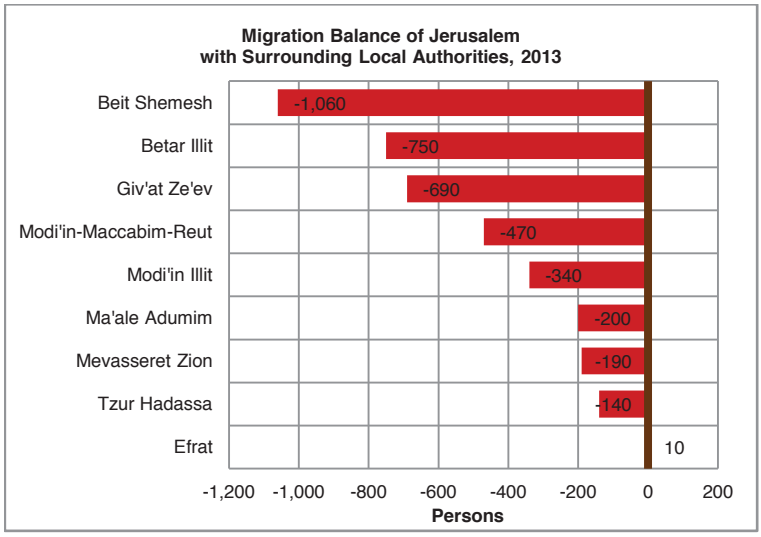
Migration balance

In 2013 Jerusalem had a negative net migration balance, at -7,400. This was smaller than the migration balance for 2012, which measured -8,700.

The largest negative migration balance figures for Jerusalem were recorded in the following districts: Judea and Samaria (-2,800), Jerusalem District (-1,800), Central District (-1,100), and Tel Aviv District (-1,100). Accordingly, Jerusalem has a very high negative migration balance with its own metropolitan area (-4,600) and to a lesser extent with the Tel Aviv metropolitan area (-2,200).

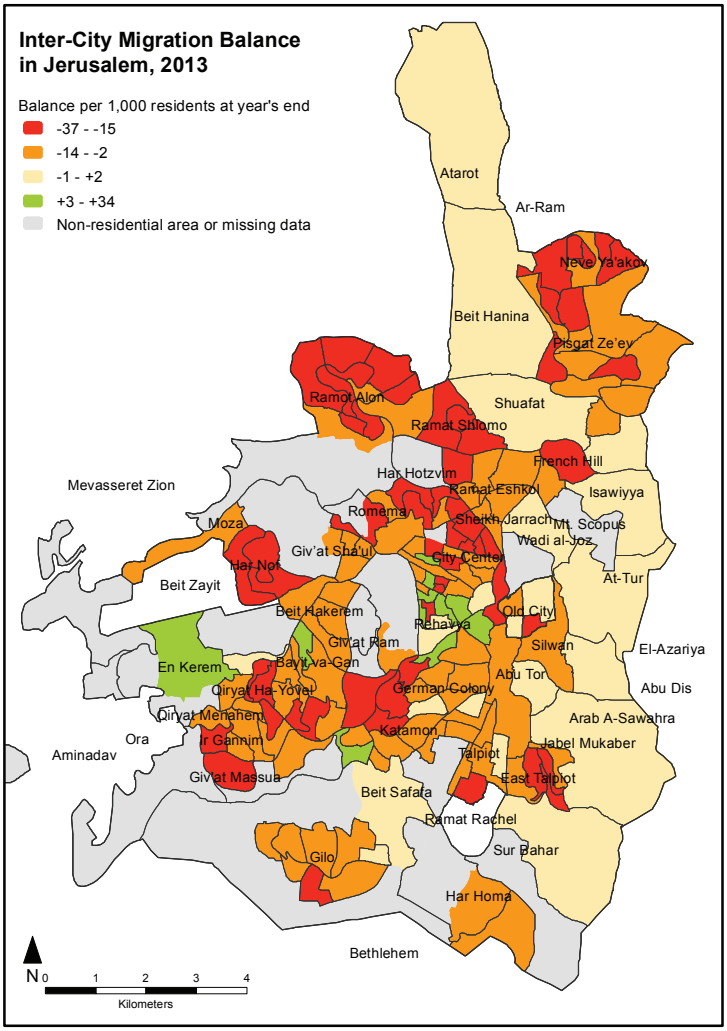


The localities between which Jerusalem had the largest negative migration balance were as follows: Beit Shemesh (-1,100), Tel Aviv (-880), Betar Illit (-750), Giv'at Ze'ev (-690), and Modi'in-Maccabim-Reut (-470). These data indicate that Jerusalem's negative migration balance results in a loss of residents from the general Jewish population (secular, traditional, and religiously observant) as well as the ultra-orthodox population.



The neighborhoods that lost the highest numbers of residents were Ramot Alon (-810), Geula and Mea She'arim (-680), Romema (-480), Neve Ya'akov (-380), and Ramat Shlomo (-370). Accordingly, the neighborhoods that lost the greatest numbers of residents were ultra-orthodox neighborhoods or neighborhoods with large ultra-orthodox populations. The highest relative proportion of the migration balance (the migration balance as compared with the size of the neighborhood's population) was recorded in Rassco and Giv'at Mordechai (-28 per 1,000 residents), Ramat Shlomo (-25), Musrara (-23), French Hill (-22), and Romema (-22).

The main age groups lost to Jerusalem as a result of the negative migration balance were as follows: ages 0-4 (-2,000 residents), ages 20-24 (-1,200), ages 25-29 (-960), and ages 30-34 (-940). As such, nearly half of the negative migration balance (-3,100) is composed of young people aged 20-34.


Inter-City Migration Balance
in Jerusalem, 2013
Balance per 1,000 residents at year's end
-37 - -15
-14 - -2
-1 - +2
+3 - +34
Non-residential area or missing data
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Ramat Eshkol
Isawiyya
Mevasseret Zion
Romema
Sheikh Jarrach
Mt. Scopus
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Har Nof
At-Tur
Beit Zayit
Beit Hakerem
Old City
Rehavya
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit va-Gan
Abu Tor
Qiryat Ha-Yovel
German Colony
Abu Dis
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Jabel Mukaber
Aminadav
Talpiot
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Sur Bahar
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Har Homa
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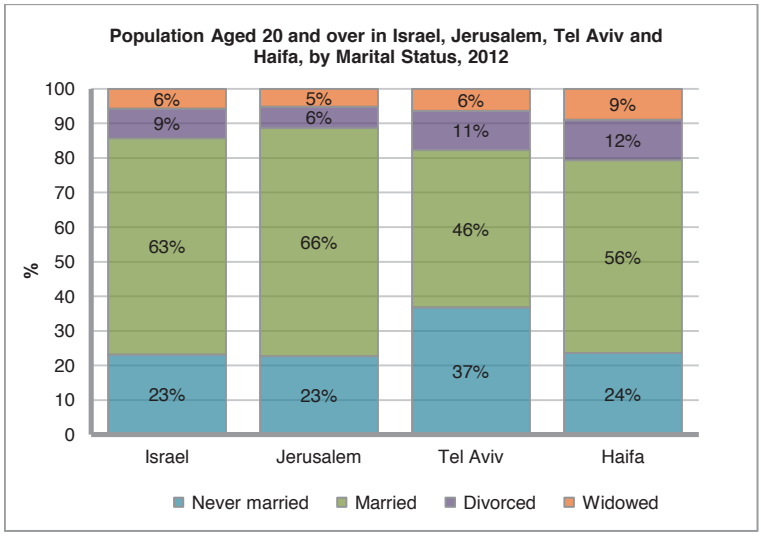
- Standard of Living and Welfare -

Family status

In 2012 two-thirds (66%) of Jerusalem residents aged 20 and above were married. About a quarter (23%) of residents were single, 6% were divorced, and 5% were widowed. The percentage of married residents of Jerusalem (66%) was slightly higher than Israel's average (63%), much higher than the average for Tel Aviv (46%), and higher than Haifa's average (56%). The percentage of married Jewish residents of Jerusalem was 63%, lower than the figure for the Arab sector (72%). The percentage of Jewish divorced persons (8%) was more than double the figure for the Arab sector (3%). The percentage of widowed in the Jewish sector in Jerusalem (6%) and the percentage of singles (23%) were comparable to the figures for the widowed and single in the Arab sector (4% and 21%, respectively).

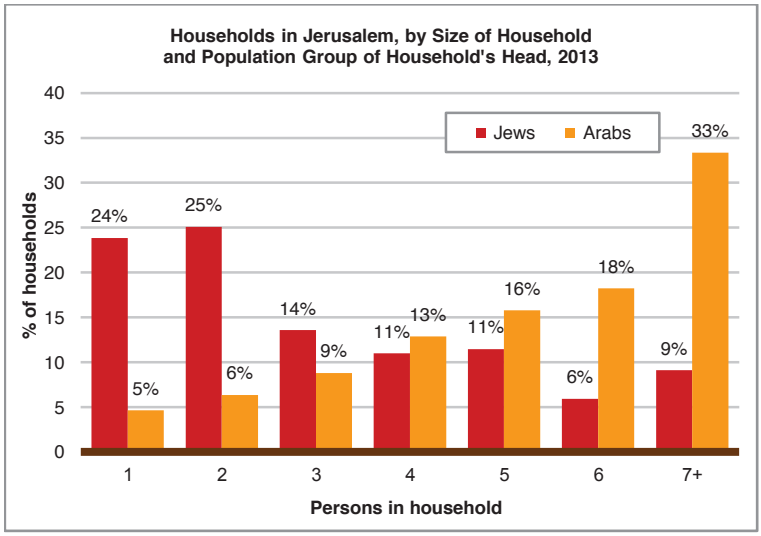
Jerusalemites marry relatively young. Among young persons aged 20-34 in Jerusalem, 55% were married, compared with 45% in Israel, 29% in Tel Aviv, and 36% in Haifa. In all, 8% of married persons in Jerusalem were in the age range of 20-24. This was higher than the figure for Israel (4%), Tel Aviv (1%), and Haifa (2%). The young age of marriage and the high percentage of those married individuals stems, among other factors, from the high proportion of ultra-orthodox Jews and Muslim Arabs in the Jerusalem population.



In 2013 Jerusalem had 8,500 single-parent families,[11] who constituted 15% of all the city's families. The percentage of single-parent families in Jerusalem (15%) is lower than the figures for Tel Aviv and Haifa (21% and 19%, respectively). Approximately 15,150 children below the age of 18 lived in single-parent families in Jerusalem, constituting 5% of the total number of children in the city. This is lower than the figure for Israel, where 9% of children belonged to single-parent families. In Tel Aviv and Haifa, children of single-parent families constituted 17% and 15% of the total population of children in the city, respectively.

Households

In 2013, Jerusalem had a total of 205,000[12] households,[13] as follows: 149,600 Jewish households (73%) and 53,200 Arab households (26%). Accordingly, the Jewish population accounts for a higher proportion of households than its share of the city's population (63%). The reason for this is that Jewish households typically include a smaller number of persons than Arab households. The average size of a household[14] was 3.3 persons in the Jewish population, significantly lower than in the Arab population, where the average size was 5.7 persons.



[11] A single-parent family consists of a single parent who is raising children, and includes widowed, divorced, and unmarried individuals.

[12] These include households associated with an unknown population group as well as "Others" (who are neither Jewish nor Arab).

[13] A household is defined as one person or a group of persons who live together in a single home on a permanent basis for most of the week and maintain a joint budget for food. A household may include persons who are not related.

[14] These include households consisting of only one person.

In 2013, 24% of Jewish households numbered one person, compared with only 5% of Arab households. Households of six or more persons constituted 15% of the total number of Jewish households, compared with 51% of the total number of Arab households.

The Jewish population of Jerusalem is characterized by large households as compared with the Jewish population of Israel's major cities. In 2013 the average size of Jewish households in Jerusalem was 3.3 persons, compared with 3.1 in all of Israel, 2.4 in Haifa, and 2.2 in Tel Aviv. The average size of an Arab household in Jerusalem was larger than that of the Arab population in Israel as a whole – 5.7 and 4.8, respectively.

A significant difference can be seen between the distribution of the number of persons per Jewish household in Jerusalem, on the one hand, and the distributions in Tel Aviv and Haifa, on the other. In 2013, 24% of Jewish households in Jerusalem comprised a single person, compared with 41% in Tel Aviv and 31% in Haifa. In Jerusalem, 15% of Jewish households included six or more persons, compared with 2% in Tel Aviv and 3% in Haifa.

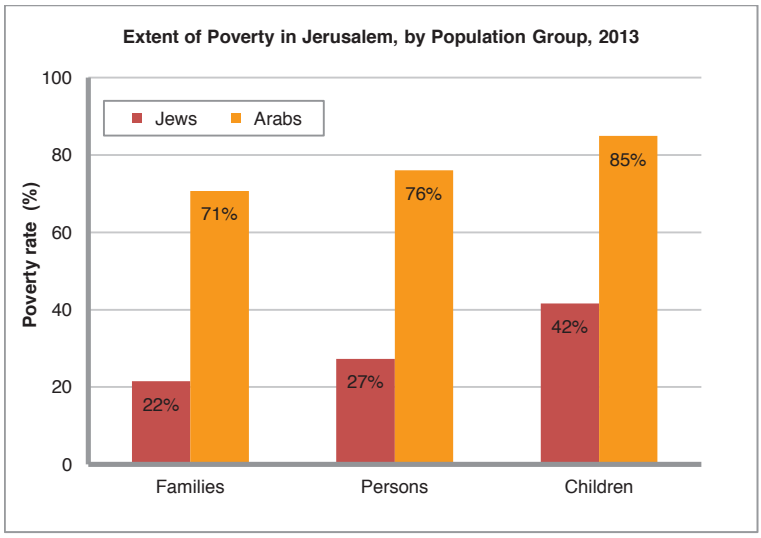
The data indicate that the more earners there are per household, the lower the average number of children: households with no earner or only one earner characteristically had a relatively larger number of children, while households with three or more earners typically had a smaller number of children. In 2013, the average number of children in a household with no earner in Jerusalem was 3.6, compared with 3.3 children in a household with one earner and 2.4 in a household with three or more earners. In Tel Aviv the average number of children in households with no earner or one earner was 2.6, compared with 1.7 children in households with three or more earners.

Extent of poverty[15]

In 2013 a total of 69,900 families in Jerusalem lived below the poverty line (35% of all Jerusalem families): 365,900 persons (46% of Jerusalem's population) and 192,500 children (60% of Jerusalem's children). The extent of poverty (the percentage of the population living below the poverty line) in Jerusalem was significantly higher than the figure for Israel, where 19% of families – 22% of the population and 31% of the children – lived below the poverty line.

The extent of poverty in the Arab population of Jerusalem was considerably higher than in the Jewish population: 76% of the Arab population lived below the poverty line, compared with 27% of the Jewish population.

[15] Poverty is a matter of relative distress and is measured in relation to the entire society. The poverty line in Israel is defined as an income level equal to 50% of the median disposable income per person. For detailed definitions and explanations, see the National Insurance Institute's annual reports, *Poverty and Social Gaps*, at http://www.btl.gov.il/English%20Homepage/Publications/Poverty_Report/Pages/default.aspx.



Within Jerusalem's ultra-orthodox population, 59% lived below the poverty line. The extent of poverty in the ultra-orthodox population of Jerusalem was lower than that in the ultra-orthodox population of Israel, where 74% of the population lived below the poverty line.

Within Jerusalem's Arab population, in contrast, the extent of poverty was higher than in Israel: 76% of the Arab population in Jerusalem lived below the poverty line, compared with 52% of the Arab population in Israel at large.

The data indicate large discrepancies among the various districts of Israel. The Jerusalem District (82% of whose residents live within the city of Jerusalem) recorded the highest poverty rate, with 44% of the population below the poverty line. In contrast, the figures were 34% in the Northern District, 22% in the Haifa District, and 11%-16% in the Southern, Tel Aviv, and Central Districts. The extent of poverty among families and children in the Jerusalem District was also the highest among the various districts.

One of the factors affecting the extent of poverty is the number of years of education: the more years of education, the lower the extent of poverty. In 2013, for example, 63% of Jerusalem's residents whose head of household had 9-12 years of schooling lived below the poverty line, compared with 39% of residents whose head of household had 13 or more years of education.

Monthly consumption expenditure

The average monthly consumption expenditure[16] per household in Jerusalem was lower than the figures for Israel and Tel Aviv but higher than that of Haifa. In 2013 the average monthly consumption expenditure per household was NIS 13,800 in Jerusalem, NIS 14,500 in Israel, NIS 15,700 in Tel Aviv, and NIS 11,200 in Haifa. The average monthly expenditure per person in Jerusalem was particularly low, at NIS 4,500, compared with Israel at NIS 5,400, Tel Aviv at NIS 7,600, and Haifa at NIS 5,200. The expenditure per person in Jerusalem is low because households in the city are relatively large: an average of 4.0 persons in Jerusalem, 3.3 in Israel, 2.2 in Tel Aviv, and 2.4 in Haifa.

The four main areas of consumption for households in Jerusalem, Israel, Tel Aviv, and Haifa are housing, transportation and communications, food, and education, culture, and entertainment. As the following table shows, the proportion of monthly expenditure devoted to each of these main areas of consumption was comparable in Israel and the major cities, but the proportion of expenditure on housing in Tel Aviv was higher. The monthly consumption expenditure is influenced by monthly income. Because of differences in household income, and particularly because of differences in income per person, the expenditure per person in each of the principal areas of consumption was significantly lower in Jerusalem than in Tel Aviv, and was also lower than in Israel generally.

Monthly consumption expenditure by main areas of expenditure in Israel, Jerusalem, Tel Aviv and Haifa, 2013

	Israel	**Jerusalem**	Tel Aviv	Haifa
Total consumption expenditure (NIS)	14,500	**13,800**	15,700	11,200
Area	% of total monthly consumption expenditure			
Housing	24%	**26%**	30%	21%
Food	17%	**18%**	15%	18%
Transportation and communications	20%	**17%**	20%	21%
Education, culture, and entertainment	12%	**13%**	11%	12%

[16] This includes the total of all household payments for the purchase of goods or services, including expenditures for consumption of housing services.

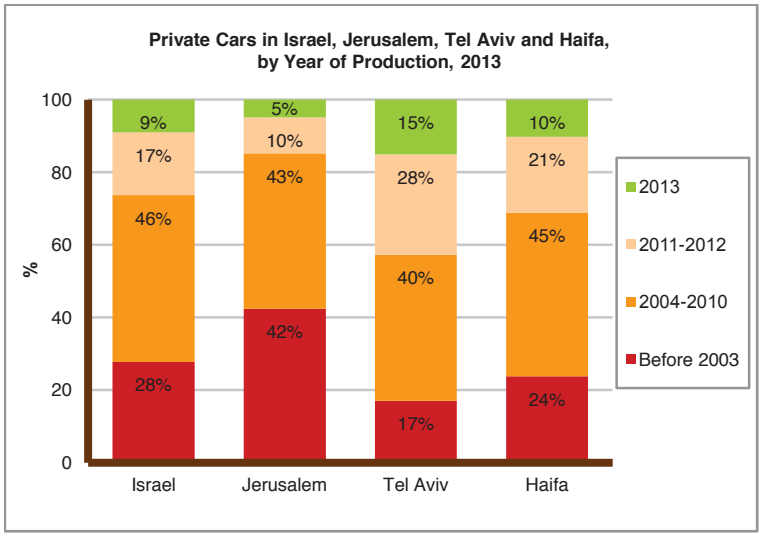
Ownership of durable goods

Another indicator of socioeconomic status within a population is the extent of a household's ownership of durable goods (key consumer products).

In 2013 a total of 72% of households in Jerusalem owned a personal computer, compared with 81% in Israel as a whole, 87% in Tel Aviv, and 82% in Haifa. A total of 51% of households in Jerusalem had internet subscriptions, 71% in Israel, 82% in Tel Aviv, and 73% in Haifa. In Jerusalem 69% of households owned a television, 88% in Israel, 91% in Tel Aviv, and 85% in Haifa. The percentage of subscribers to cable or satellite television was also low in Jerusalem, at 32%, compared with 62% in Israel, 67% in Tel Aviv, and 58% in Haifa. The relatively low percentage of Jerusalem households that have a television and cable service, like the low percentage of internet subscribers, stems among other factors from the relatively large proportion of the ultra-orthodox population, which does not tend to have a television or internet service at home.

Jerusalem recorded the highest percentage of households owning satellite dishes, at 27% (compared with 5% in Tel Aviv and 12% in Haifa), as well as households with digital converters, at 26% (compared with 7% in Tel Aviv and 8% in Haifa). At the same time, as noted, Jerusalem recorded the lowest percentage of cable or satellite television subscribers. The high rate of ownership of satellite dishes, which receive television broadcasts from Arab countries, is primarily characteristic of Arab households.

Ownership of a vehicle is another indicator of socioeconomic status. The percentage of Jerusalem households that own at least one car is relatively low: 54% of households in Jerusalem had at least one car, compared to 67% in Israel, 64% in Tel Aviv, and 56% in Haifa. Moreover, the average age of cars in Jerusalem was relatively high (8.6 years), compared with Israel (6.6), Tel Aviv (4.9), and Haifa (6.0).



Housing density

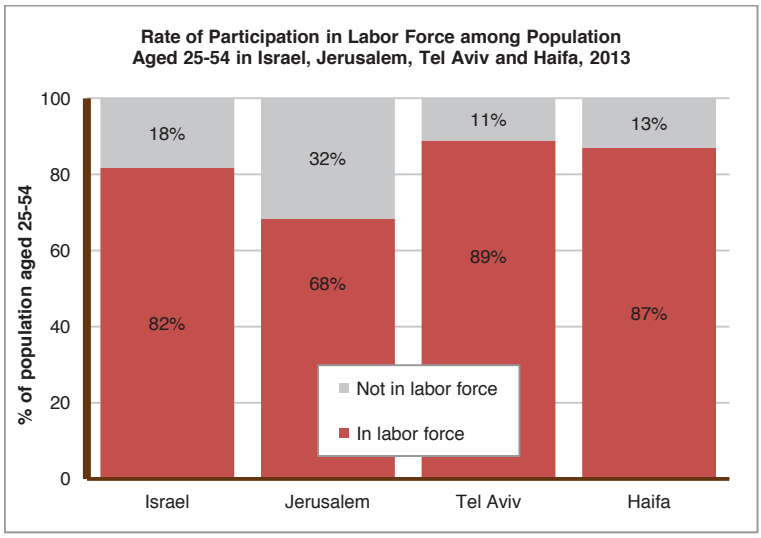
In 2013 the average housing density in Jerusalem was 0.9 persons per room in the Jewish population, and more than double that figure in the Arab population – 2.0 persons per room. The average housing density within the Jewish population of Jerusalem was slightly higher than the average housing density within the Jewish population of Israel (0.8 persons per room) or Tel Aviv and Haifa (0.7 persons per room). Also, the average housing density within the Arab population of Jerusalem (2.0) was higher than that within the Arab population of Israel (1.4).

- Employment -

Labor force participation rate

In 2013 the population of Jerusalem aged 15 and above numbered 543,900 persons, of whom 279,000 participated in the labor force[17] (a 51% rate of participation). Among those participating in the labor force, 258,700 were employed (93%) and 20,400 were unemployed[18] (7%).

Labor force participation rates vary in accordance with the age of the population. In 2013 the rate of participation in the labor force in Jerusalem for the peak working ages (25-54) was 68%, which was significantly higher than the rate of participation in the labor force of persons aged 15 and above (51%). Nevertheless, this rate (68%) was significantly lower than that in Israel (82%), Tel Aviv (89%), and Haifa (87%).



Studies conducted by the Bank of Israel show that a low rate of participation in the labor force prevents optimization of the economy's production capacity, negatively affects the standard of living, and extends the dimensions of poverty. These studies further show that a low rate of participation in the labor force and the employment market in Israel is characteristic of those with a low level of education, men who are fully engaged in ultra-orthodox studies, and Arab women, in particular those with a low level of education.[19]

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[17] The labor force includes employed persons and unemployed persons actively seeking work among the population aged 15 and above.

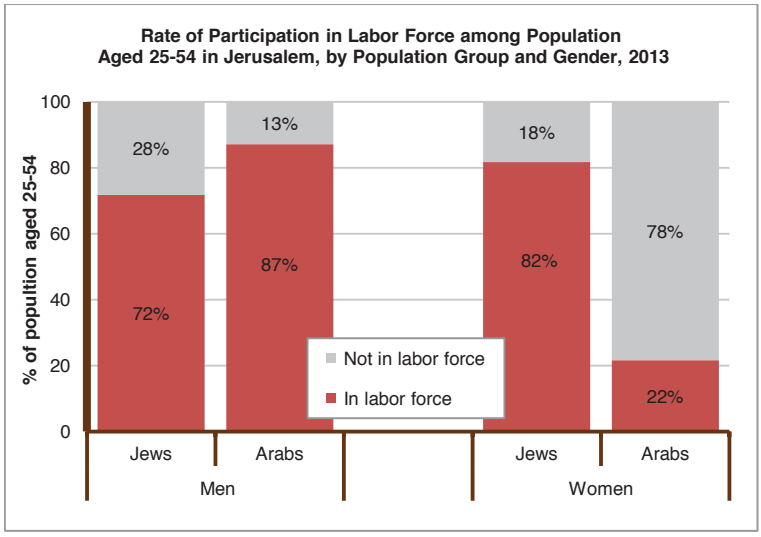
[18] These were unemployed persons actively seeking and available for employment.

[19] Bank of Israel, Press Release: Rate of employment in Israel in an international perspective (in Hebrew): http://www.boi.org.il/he/newsandpublications/pressreleases/pages/030317a.aspx.

The relatively low rate of participation in the labor force in Jerusalem stems from the low rate of participation of ultra-orthodox men and Arab women.

Between men and women, a significant gap existed in the rate of participation in the labor force. In 2013 the rate of participation in the labor force in Jerusalem among men aged 25-54 was relatively low (78%) compared with Tel Aviv (91%), Haifa (88%), and Israel (87%). The low labor force participation rate among Jewish men in Jerusalem (72%) was attributable primarily to the low rate of participation among ultra-orthodox men. The rate of participation among Arab men was high, at 87%.

Among Jerusalem women, the rate of participation in the labor force for the peak working ages was 59%, considerably lower than the rate in Tel Aviv (87%), Haifa (86%), and Israel (77%). This low rate of participation among Jerusalem women is attributable to the particularly low rate of participation among Arab women (22%) compared with Jewish women (82%). The rate of participation among Jewish women in Jerusalem (82%) was higher than the rate among Jewish men (72%), whereas in the other main cities this trend was reversed, with the rate of participation of men being higher than that of women.



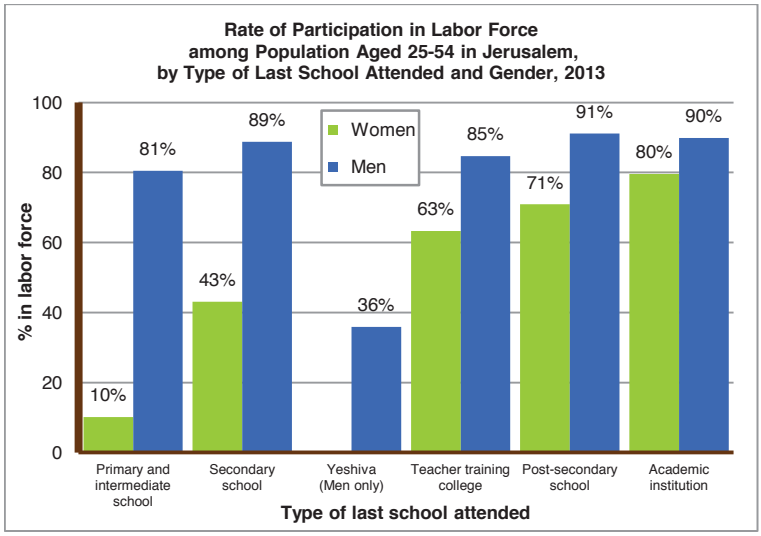
Labor force participation rate among population of peak working ages (25-54) in Israel, Jerusalem, Tel Aviv, and Haifa, by gender, 2013

	Israel	**Jerusalem**	Tel Aviv	Haifa
Total	82%	**68%**	89%	87%
Men	87%	**78%**	91%	88%
Women	77%	**59%**	87%	86%

Labor force participation rate among population of peak working ages (25-54) in Israel and in Jerusalem, by population group and gender, 2013

	Israel			**Jerusalem**		
	Total	Jews	Arabs	**Total**	**Jews**	**Arabs**
Total	82%	87%	59%	**68%**	**77%**	**54%**
Men	87%	88%	82%	**78%**	**72%**	**87%**
Women	77%	87%	36%	**59%**	**82%**	**22%**

Labor force participation rates vary greatly in accordance with level of education. Among those of peak working ages (25-54) in Jerusalem, the highest participation rate was recorded for graduates of institutions of higher education: holders of academic degrees (84%), graduates of post-secondary educational institutions without academic degrees (80%), and graduates of teachers' and preschool training colleges (65%). Among high school graduates the rate of participation was 66%. Particularly low labor force participation rates were recorded among those with elementary or middle school education (48%) and graduates of yeshivas (36%).



Labor force participation rate by nature of religious identification[20]

The rate of participation in the labor force varies in accordance with the nature of religious identification among residents of both the Jewish and Arab populations, as evidenced by an analysis of data from the social survey conducted by the Central Bureau of Statistics.

During the years 2011-2013 (on average), the labor force participation rate among persons aged 20 and above within Jerusalem's Jewish population was 62%, lower than the rate for Israel (71%). There was a significant discrepancy in the labor force participation rate between those who defined themselves as belonging to the general Jewish population (secular, traditional, and religiously observant) and those who defined themselves as ultra-orthodox. The labor force participation rate within the general Jewish population stood at 67%, compared with 53% among the ultra-orthodox.

Among the various groups that constitute the general Jewish population of Jerusalem, the labor force participation rates were comparable (64%-66%), with the exception of the secular population, which recorded a higher rate, at 72%.

Labor force participation rates for ages 20 and above among the Jewish population in Israel and in Jerusalem, by religious identification, 2011-2013 (average)

	Total population	General Jewish population, not ultra-orthodox					Ultra-orthodox population
		Total	Secular, not observant	Traditional, loosely observant	Traditional, religiously observant	Religiously observant	
Israel	71%	72%	75%	71%	69%	69%	58%
Jerusalem	**62%**	**67%**	**72%**	**66%**	**64%**	**65%**	**53%**

The rate of participation among those aged 20 and above in the non-Jewish population was lower than the rate in the Jewish population, at 41% in Jerusalem and 54% in Israel. Within Jerusalem's non-Jewish population the labor force participation rate varied significantly in accordance with degree of religious observance. The higher the degree of religious observance, the lower the labor force participation rate. Among the population that defined itself as not religiously observant, the participation rate was 76%, compared with 41% among those who defined themselves as religiously observant and only 18% among those who defined themselves as very religiously observant.

[20] The data in this section were obtained from the annual social survey conducted by the Central Bureau of Statistics. Among other factors, the survey addresses the nature of religious identification as the survey respondents define themselves. This aspect of the survey makes it possible to examine the labor force from another angle. However, because of changes to the definitions, it is not possible to compare the data from the social survey with data from other surveys, and accordingly the data arising from this survey differ from data presented by the labor force survey.

Labor force participation rate for ages 20 and above among the non-Jewish population in Israel and in Jerusalem, by nature of religious identification, 2011-2013 (average)

	Total	Not religiously observant	Loosely religiously observant	Religiously observant	Very religiously observant
Israel	54%	73%	61%	47%	25%
Jerusalem	**41%**	**76%**	**47%**	**41%**	**18%**

Employed persons

In 2013 the number of employed persons in Jerusalem (aged 15 and older) totaled 293,200, constituting approximately 9% of the total number of employed in Israel. In Tel Aviv, the economic and business center of Israel, the number of employed persons was greater than that of Jerusalem – 387,800 – representing 11% of the total number of employed persons in Israel. Haifa had 167,000 employed persons, constituting 5% of the total number of employed.

In 2013 the number of employed persons in Jerusalem accounted for 35% of the total number of residents in the city (293,200 employed persons and 829,900 residents). In Tel Aviv the number of those employed was almost identical to the city's number of residents: the number of employed persons corresponded to 93% of all residents, although about two-thirds of those employed in Tel Aviv were not residents of the city (387,800 employed and 418,600 residents). In Haifa the number of those employed corresponded with 61% of all residents (167,000 employed and 273,200 residents).

An analysis of the places of residence of employed persons reveals that in 2013 a total of 77% of those employed in Jerusalem were residents of the city, 16% were residents of the Jerusalem metropolitan area (10% from Judea and Samaria and 6% from the Jerusalem District) and 6% were residents of the Tel Aviv metropolitan area. In Tel Aviv the picture was different: 36% of employed persons were residents of Tel Aviv, 55% were residents of the Tel Aviv metropolitan area (Tel Aviv District and Central District), and 1% were residents of the Jerusalem District. Accordingly, most of those employed in Jerusalem were residents of the city, in contrast to Tel Aviv, where only about one-third were city residents. This reflects Tel Aviv's economic power within the metropolitan area and the relative size of the city's population in relation to that of the metropolitan area: Jerusalem's population constitutes 61% of its total metropolitan population, while Tel Aviv's population accounts for 13% of its total metropolitan population.

In 2013 a total of 258,600 of Jerusalem's residents were employed, of whom 87% worked in Jerusalem. By way of comparison, 70% of Haifa's employed residents worked in Haifa, and 62% of Tel Aviv's employed residents worked in Tel Aviv.

In general, women are more likely than men to work close to home. In 2013 among employed women who were residents of Jerusalem, 92% worked in the city, compared with 83% of employed men who were residents of Jerusalem and worked in the city. In Tel Aviv, 70% of employed women who were residents of the city also worked in the city, compared with 56% of men.

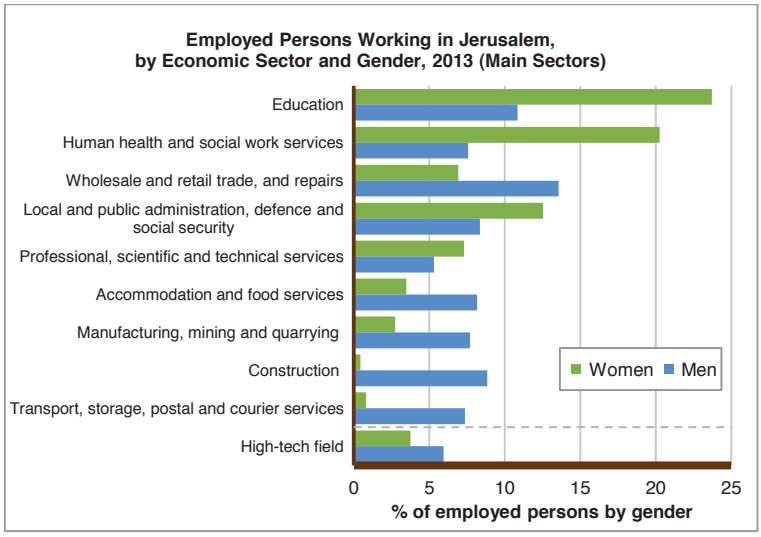
Among employed residents of Jerusalem, 71% were Jews and 29% Arabs. Employed Jews were more likely to work outside of Jerusalem than employed Arabs: 16% compared with 6%, respectively.

Jerusalem's status as the capital of Israel and its governmental and administrative center, where government ministries and national institutions are concentrated, results in a very high proportion of persons employed in public service. In 2013 a total of 41% of those employed in Jerusalem worked in the public service sector (local and public administration, education, and human health and social work services), compared with 33% in Israel, 32% in Haifa, and 22% in Tel Aviv. The main economic sectors in which employed persons in Jerusalem worked were as follows: education – 17% (12% in Israel and only 7% in Tel Aviv), human health and social work services – 14% (10% in Israel and 8% in Tel Aviv), local and public administration – 10% (11% in Israel and 7% in Tel Aviv), and commerce – 10% (12% in Israel and 10% in Tel Aviv).

Among those employed in Jerusalem, 2% worked in financial and insurance services, and 6% worked in professional, scientific, and technical services. In Israel the figures for these sectors were comparable at 3% and 7%. Tel Aviv had a notably high percentage of employed persons in these sectors: 10% worked in financial and insurance services, and 14% in professional, scientific, and technical services. The percentage of employed persons in the industrial sector in Jerusalem was low, at 5%, comparable to the figure for Tel Aviv (4%) and lower than the figures for Israel (12%) and Haifa (11%).

In 2013 the main sectors of the economy in which Jewish residents of Jerusalem were employed were education (19%), human health and social work services (14%), and commerce (9%). The main sectors of the economy in which Arab residents of Jerusalem were employed were commerce (17%), construction (15%), and accommodation and food services (10%).

The main economic sectors among men employed in Jerusalem were commerce (14%), education (11%), and construction (9%). Among employed Jewish men in Jerusalem the main economic sectors were education (15%) and commerce (10%), while among Arab men the main sectors were commerce (20%) and construction (18%). The main economic sectors among women employed in Jerusalem were education (24%), human health and social work services (20%), and local and public administration (13%). Among employed Jewish women in Jerusalem the main economic sectors were education (23%) human health and social work services (19%), and local and public administration (14%). Among employed Arab women, the very high percentage of those employed in education stands out – 41% – as does the percentage of those employed in human health and social work services – 33%.



Salary and income[21]

In 2012 Jerusalem had 243,100 salaried employees (93% of all employed persons in Jerusalem) and 17,500 self-employed workers (7%). The proportion of salaried employees was comparable to the figures for Tel Aviv (91%), Haifa (94%), and Israel (93%).

In 2012 the average (gross) monthly salary for an employee in Jerusalem was NIS 8,000. This was lower than the average for Israel (NIS 9,500), Tel Aviv (NIS 11,300), and Haifa (NIS 10,400). The average monthly salary in Jerusalem was also lower than that of surrounding localities, with the exception of localities that have a majority ultra-orthodox or Arab population. In Har Adar the average (gross) monthly salary for an employee was NIS 16,300, in Tzur Hadassa NIS 13,300, in Mevasseret Zion NIS 12,900, in Efrat NIS 11,100, for localities within the Mateh Yehuda Regional Council NIS 11,000, in Giv'at Ze'ev NIS 9,600, in Ma'ale Adumim NIS 9,500, and in Beit Shemesh (where about half of the population is ultra-orthodox) it was NIS 7,600. For localities where the population is primarily ultra-orthodox, the average monthly salaries were lower than the average in Jerusalem: in Kiryat Ye'arim (Telz Stone) NIS 7,000, in Kochav Ya'akov NIS 6,000, and in Betar Illit NIS 5,500. In Abu Ghosh, where most of the population is Arab, the average monthly salary was NIS 6,800.

An examination of salary by gender revealed a significant gap between the salaries of employed men and employed women. In 2012 the average monthly (gross) salary

[21] Income and salary data are derived from two sources: *Average Salary and Income by Place of Residence and Various Economic Variables* by the National Insurance Institute (in Hebrew at http://www.btl.gov.il/Publications/survey/Pages/seker_2631026-6913.aspx) and *Income Survey* by the Central Bureau of Statistics (in English at http://www.cbs.gov.il/reader/?MIval=cw_usr_view_SHTML&ID=404). It should be noted that each source assessed wages and income in a different way, and the data therefore differ.

in Jerusalem among men was NIS 8,900, which was 25% higher than the average for women, at NIS 7,100. In Tel Aviv and Haifa, as noted, the average salary was higher than in Jerusalem, and so too was the gap between men's and women's salaries. In Tel Aviv the average salary was NIS 13,400 for men, which was 46% higher than women's average salary, at NIS 9,200. In Haifa, the gap between men's and women's salaries was the greatest, at 61%, with men's salaries averaging NIS 12,900 and women's salaries averaging NIS 8,000. In Israel the average salary for men was NIS 11,400, 50% higher than the average for women, at NIS 7,600.

The difference in average monthly salaries between men and women can be attributed primarily to two factors: hourly rates and number of hours worked. In 2012 the average hourly wage for men in Jerusalem (NIS 47) was comparable to the hourly wage for women (NIS 46). The average hourly wage among men in Tel Aviv (NIS 76) was 44% higher than the average for women (NIS 53). In Israel the average hourly wage for men (NIS 55) was 17% higher than for women (NIS 47). The average number of working hours per week among men in Jerusalem was 42, compared with 45 in Tel Aviv, Haifa, and Israel. The average number of working hours per week among women was lower, at 33 in Jerusalem, 39 in Tel Aviv, 35 in Haifa, and 36 in Israel.

Job satisfaction across various sectors

The social survey of the Central Bureau of Statistics asked respondents aged 20 and above about their level of satisfaction with their workplace and salary. They were also asked whether they are concerned about loss of employment.

The survey revealed that during 2011-2013 (on average), 87% of Jerusalem residents were satisfied or very satisfied with their workplace. A comparison of Jerusalem with all of Israel and other main cities indicates that the proportion of those in Jerusalem who reported being satisfied or very satisfied with their workplace was comparable to the figures for Israel, Tel Aviv, and Rishon Lezion (87%-90%) and higher than the figure for Ashdod and Haifa (84%).

Regarding satisfaction with their level of income, 59% of Jerusalem residents were satisfied or very satisfied with their income. Identical rates were recorded for Israel and Tel Aviv. In Rishon Lezion the percentage was slightly higher (61%), while in Ashdod and Haifa it was lower (51%-55%).

Another interesting question relates to concerns about loss of employment. The data revealed that Jerusalem residents felt relatively secure about their workplace compared with the other major cities. During the years 2011-2013 (on average), 53% of Jerusalem's residents reported that they were not at all concerned about losing their job. A comparable percentage was recorded for Tel Aviv (57%). Higher percentages of residents were concerned about losing their employment in Ashdod and Rishon Lezion (67%) as well as Israel and Haifa (63%-65%). Conversely, Jerusalem recorded the highest percentage of residents who reported being greatly concerned or very greatly concerned about losing their job, at 14%. In other major cities and in Israel at large, 10%-11% of residents were concerned about losing their job.

The survey further revealed that Jerusalem residents are fairly satisfied with their financial situation. During the years 2011-2013 (on average), 58% of Jerusalem residents were satisfied or very satisfied with their financial situation. This is identical to the figure for Rishon Lezion and slightly higher than the figures for Israel (56%) and Tel Aviv and Haifa (54%). In Ashdod 49% were satisfied or very satisfied with their financial situation.

Level of satisfaction among Jerusalem residents aged 20 and above with respect to specific aspects of life, 2011-2013 (average)

Satisfaction with...	Very satisfied	Satisfied	Not very satisfied	Not at all satisfied
Workplace	40%	47%	10%	3%
Income	11%	48%	26%	15%
Financial situation	10%	48%	31%	11%
Life	43%	48%	8%	1%

- Business and Industry -

Active businesses[22]

Business activity in the urban sphere is one of the indicators of a city's economic resilience. Business activity is affected by supply and demand in relation to economic activity in the city, the size of the population, and economic and social processes at the local, national, and international levels.[23] Business activity is calculated in a number of ways, such as by measuring changes and trends among active businesses, openings and closings of businesses, and business survival.

The Jerusalem metropolitan area has a population of about 1,164,000. In 2013 Jerusalem had 36,400 active businesses, constituting 7% of all active businesses in Israel. Tel Aviv, Israel's financial center, serves a metropolitan area of about 3,642,000 residents. The number of active businesses in Tel Aviv was almost double the figure for Jerusalem, at 68,100, constituting 13% of the active businesses in Israel. Haifa, which serves a metropolitan area of about 891,000 residents, has fewer active businesses than Jerusalem, at 20,700, about 4% of the active businesses in Israel. Between 2011 and 2013 the number of businesses in Jerusalem increased by 3% (from 35,200 in 2011 to 36,400 in 2013). Tel Aviv had a 3% increase, Israel had a 5% increase, and Haifa had a 2% increase.

In 2013 the largest numbers of active businesses in Jerusalem were recorded in the following sectors: wholesale and retail trade and repairs (19%), professional, scientific, and technical services (16%), and local and public administration, education, health, and welfare and social services (15%). The percentage of businesses in the wholesale, retail, and repairs sector (19%) was higher than the figure for Tel Aviv (15%) and comparable to the figures for Israel and Haifa (18% each). The percentage of businesses classified as professional, scientific, and technical services was 16% in Jerusalem, lower than the figures for Israel (19%), and Tel Aviv (26%). The percentage of businesses in the public services sector – local and public administration, education, health services, and welfare and social services – in Jerusalem (15%) was higher than the figure for Israel (11%) and for Tel Aviv (9%). The manufacturing, mining, and quarrying sector (industrial sector) constitutes an important element in the economy of cities. About 4% of all active businesses in Jerusalem were in this sector, the same as the figure for Tel Aviv and Haifa (4%) and slightly lower than that for Israel (5%).

High-tech[24] businesses constituted 3% of all active businesses in Jerusalem, 5% in Tel Aviv, and 4% in Israel.

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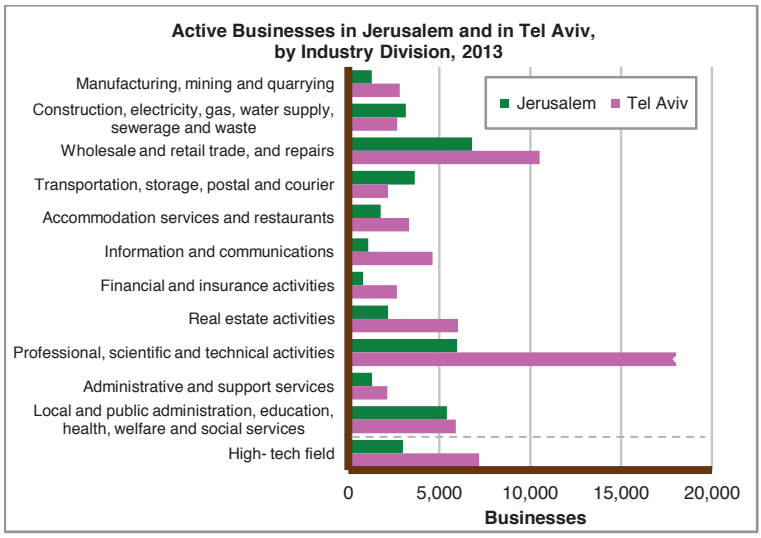
22 An active business is defined as a business that registered at least one financial transaction per month during the year.

23 Tzadik, A. (2007) "Small and Mid-Sized Businesses in Israel and Developing Countries," Jerusalem: The Knesset Center for Research and Information (Hebrew).

24 The high-tech industry constitutes part of the industrial sector but includes businesses from other sectors as well, such as communications, research and development, and others. For additional information, see *Recommendations of the Sub-Committee for Official Classification of High-Technology Branches – High-Tech Definitions in Israel*, Central Bureau of Statistics, http://cbs.gov.il/www/publications/hitech/hi_class_heb.pdf (Hebrew).



The number of businesses per 1,000 residents (rate per thousand) reflects the supply and demand for businesses in the city as well as the size and economic power of the geographic area served by the city. That is, the greater the number of businesses per 1,000 residents, the higher the likelihood of providing good commercial services to the residents. In 2013, the number of businesses per 1,000 residents in Jerusalem was 44, lower than the average for Israel (64), much lower than the figure for Tel Aviv (163), and lower than the figure for Haifa as well (76). Examining the ratio of businesses per 1,000 residents by economic sector reveals that in 2013 in Jerusalem the economic sector of wholesale, retail, and repairs had the highest ratio, at 8 businesses per 1,000 residents. This was still lower than the figures for Israel (11), Tel Aviv (25), and Haifa (14). Jerusalem's accommodation services and restaurants sector recorded 2 businesses per 1,000 residents, lower than the figures for Israel (3), Tel Aviv (8), and Haifa (4).

Additional prominent economic sectors in Jerusalem, relative to other sectors, were the professional, scientific, and technical services sector (7 per 1,000 residents), and local and public administration; education; and health, welfare, and social services (7 per 1,000 residents for all these sectors combined). However, the ratio of businesses per thousand residents in these sectors was still lower than the figures for Israel, Tel Aviv, and Haifa.

The ratio of businesses per 1,000 residents in Jerusalem did not change during the years 2011-2013. It stood at 44 businesses per 1,000 residents in 2013, as it had in 2011. In Israel this ratio was 63 businesses per 1,000 residents in 2011, rising to 64 in 2013, while in Tel Aviv the ratio decreased during these years from 164 to 163 businesses per 1,000 residents.

Businesses with salaried employees are an important part of the local, regional, and national economic system, serving as the economic engine that drives job creation and

encourages innovation.[25] Small businesses employing 1-4 salaried employees are very important and constitute a key contributing factor to economic activity in cities. Large businesses employing more than 100 salaried employees are few in number, but they have an especially strong influence on the scope of employment within cities. In 2013, 52% of the active businesses (19,100 businesses) in Jerusalem employed salaried workers; some two-thirds of these were small businesses employing 1-4 salaried workers (12,700 businesses).

Business openings and closings[26]

Business openings and closings and the net change between these figures (difference between the number of openings and the number of closings) indicate the degree of economic development of cities and the feasibility of advancing new ventures and business innovation in a city. During 2013, a total of 3,300 new businesses opened in Jerusalem, and 2,600 closed. The net change in number of businesses in Jerusalem was positive, at 700. In Tel Aviv, Israel's financial center, 5,900 businesses opened and 5,100 closed, resulting in an increase with a net change of 800 businesses. In Haifa 1,900 businesses opened and 1,700 closed, resulting in a net change of 200.

Over time, business openings and closings are characterized by consistent trends, but during times of crisis or economic recession, the number of closings is greater than the number of openings. The following tables illustrate changes in the openings and closings of businesses in Jerusalem compared to other major cities in Israel.

Openings and closings of businesses in Jerusalem, 2008-2013

Year	Openings	Closings	Net Change
2008	3,100	2,500	+600
2009	2,900	2,500	+400
2010	3,200	2,700	+500
2011	3,200	2,600	+600
2012	3,200	2,900	+300
2013	3,300	2,600	+700

[25] OECD (2011), *Entrepreneurship at a Glance 2011*, OECD Publishing, http://dx.doi.org/10.1787/9789264097711-en.

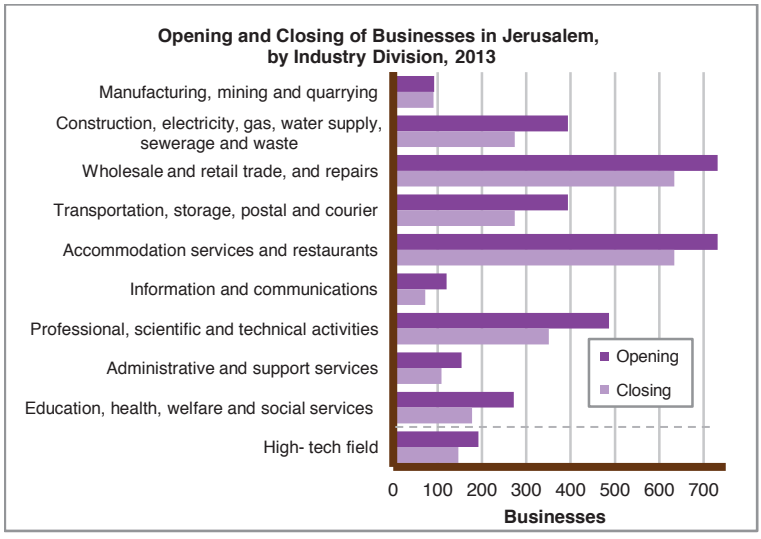
[26] Business openings and closings are defined by the date of registration of the business opening or its closing for VAT purposes. In contrast to the definition of an active business, requiring economic activity, registration for VAT purposes does not require reporting on economic activity by the business. That is, a business can be defined as open even if it does not engage in any economic activity.

Net change in openings and closings of businesses in Israel, Jerusalem, Tel Aviv and Haifa, 2008-2013

Year	Israel	**Jerusalem**	Tel Aviv	Haifa
2008	10,700+	**600+**	1,400+	200+
2009	9,000+	**400+**	1,500+	200+
2010	12,500+	**500+**	1,900+	300+
2011	12,200+	**600+**	2,100+	300+
2012	10,100+	**300+**	900+	200+
2013	+8,700	**+700**	+800	200+

In 2013 all the economic sectors in Jerusalem showed a positive net change. The prominent sectors were the scientific, professional, and technical services sector, with an increase of 140 businesses; the construction, electricity, gas, water supply, sewerage, and waste sector, with an increase of 120 businesses; the wholesale, retail, and repairs sector with an increase of 100 businesses; and the education sector and health services, with an increase of 90 businesses.

In 2013 approximately 1,400 businesses employing salaried workers opened in Jerusalem and 700 such businesses closed, resulting in a positive net change of 700 businesses. At the same time, about 1,900 businesses without salaried employees opened in Jerusalem, and 1,800 such businesses closed, resulting in a positive net change as well for businesses without salaried employees, at 100 businesses.



The principal economic sectors in Jerusalem with salaried employees and a positive net change between openings and closings in 2013 were the wholesale, retail, and repairs sector, with a positive net change of 180 businesses; the construction, electricity, gas, water, sewerage, and waste sector, with a positive change of 140 businesses; and the accommodation services and restaurants sector, with a positive net change of 80 businesses.

Business survival

The indicator of business survival following establishment makes it possible to understand and identify the stability and resilience of the economic and business systems of cities. Of businesses founded in Israel in 2009, 56% successfully survived until 2013. Jerusalem showed a similar trend (58% of businesses survived), as did Tel Aviv (59% of businesses survived). In Haifa 54% of businesses survived. The likelihood of a business founded in 2009 surviving its first year was 88% in Jerusalem (87% in Israel). The likelihood of surviving two years was 75% (73% in Israel), for three years the rate was 64% (63% for Israel), and for four years it was 58% (56% in Israel).

Likelihood of businesses founded in 2009 surviving until 2013 in Israel, Jerusalem, Tel Aviv and Haifa

Year	Israel	**Jerusalem**	Tel Aviv	Haifa
2010	87%	**88%**	89%	87%
2011	73%	**75%**	76%	72%
2012	63%	**64%**	66%	62%
2013	56%	**58%**	59%	54%

The percentage of closings during newly established businesses' first three years is relatively high. The likelihood of surviving another year increases after a business has survived its first three years. Of businesses founded in Jerusalem in 2009, 88% survived in 2010, and this figure decreased further in 2011, with 85% of the businesses that survived 2010 successfully surviving another year. A significant portion of businesses also fail to survive a third year, with 85% of those that survived 2011 successfully surviving 2012 as well. This figure rose to 91% for those businesses that survived 2012 and succeeded in surviving 2013 as well.[27]

The various economic sectors have different survival rates. Three sectors – local and public administration and health, welfare, and social services; financial and insurance services; and education – had the highest survival rates in Jerusalem, with a large percentage of these surviving four years after their establishment: 72%, 69%, and 69%

[27] The data relate only to businesses founded in 2009.

respectively. The same sectors also showed high survival rates in Israel (72%, 68%, and 62%, respectively) and in Tel Aviv (76%, 68%, and 62%, respectively). Conversely, the business survival rate in the accommodation services and restaurants sector for businesses founded in 2009 were the lowest among all sectors, at 37% after four years, comparable to the figures for Israel (39%) and Tel Aviv (40%).

The survival rate for Jerusalem businesses in the wholesale, retail, and repairs sector was 51% after four years, comparable to the figures for Israel (50%) and Tel Aviv (48%). The survival rate of businesses in the industrial sector in Jerusalem that opened in 2009 and survived until 2013 was 64%, higher than the rate in Israel (54%), Tel Aviv (54%), but lower than the figure for Haifa (69%).

Industry

In 2013 a total of 410,500 persons worked in Israel's industrial sector (high, mixed, and low technology[28]), constituting 12% of all employed persons in Israel. In Jerusalem a total of 15,800 worked in industry, constituting 5% of all employed persons in the city.

The percentage of those employed in industry in Jerusalem (5%) was comparable to the figure for Tel Aviv (4%) but lower than the figures for Haifa (11%) and Israel (12%).

In 2011[29] the number of employment positions in Jerusalem in industry was 14,100, of which 39% were in high and high-mixed technology industries, 13% in low-mixed technology industries, and 48% in low-technology industries. In Tel Aviv the number of positions in industry was 18,100 (36% of which were in high and high-mixed technology industries), and in Haifa there were 12,600 positions (52% of which were in high and high-mixed technology industries). In Israel the number of positions was 358,400, (of which 42% were in high and high-mixed technology industries).

The large industrial zones in Jerusalem in terms of number of positions are Har Hotzvim (3,400 positions), Talpiot (2,600 positions), Atarot (2,400 positions), and Giv'at Shaul (1,500 positions). The main economic sectors within the city's industry in terms of number of positions include food, beverages, tobacco, textiles, clothing, footwear, and leather (5,300 positions), electrical and electronic equipment (2,700 positions), metal products, transport vehicles, mechanized and office equipment (2,200 positions), chemicals and minerals (2,200 positions), and lumber products, furniture, paper, and printing (1,000 positions).

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[28] The high technology industry includes the electronics industry, medical equipment, and quality control and development. The high-mixed technology industry includes machine and equipment manufacturing, the chemicals industry, petroleum refining, and the manufacture of electrical engines. The low-mixed technology industry includes mining, quarrying, and manufacturing plastic products, metals, and jewelry. The low-technology industry includes the manufacture of food and beverages, textiles, paper, and furniture.

[29] Statistics about industry are based on a national survey of industry conducted by the Central Bureau of Statistics. The updating, analysis, and publication of data take a relatively long time and therefore the data presented in this section are for 2011.

In 2011 the gross added value[30] of Jerusalem's industry stood at NIS 5,573 billion, which constituted 5.1% of the gross added value of industry in Israel. This figure reflects the relative strength of industry in Jerusalem, given that the percentage of positions in industry in Jerusalem was only 3.9% of all industry positions in Israel. By comparison, the industry positions in Tel Aviv constituted 5.1% of all industry positions in Israel while its gross added value was 3.5% of the gross added value of industry in Israel.

Most of the gross added value of industry in Jerusalem came from large companies employing 100 workers or more (78% of the total added value in Jerusalem), although the number of positions in these companies was 53% of the total for industry in Jerusalem. The contribution of Jerusalem's mid-sized companies (20-99 workers) to the gross added value stood at only 12%, whereas the number of positions in these companies constituted 24% of the total for industry in Jerusalem. The contribution of Jerusalem's small companies (1-19 workers) to the gross added value was just 10%, while the number of positions they provided was 23% of the total number of positions in industry.

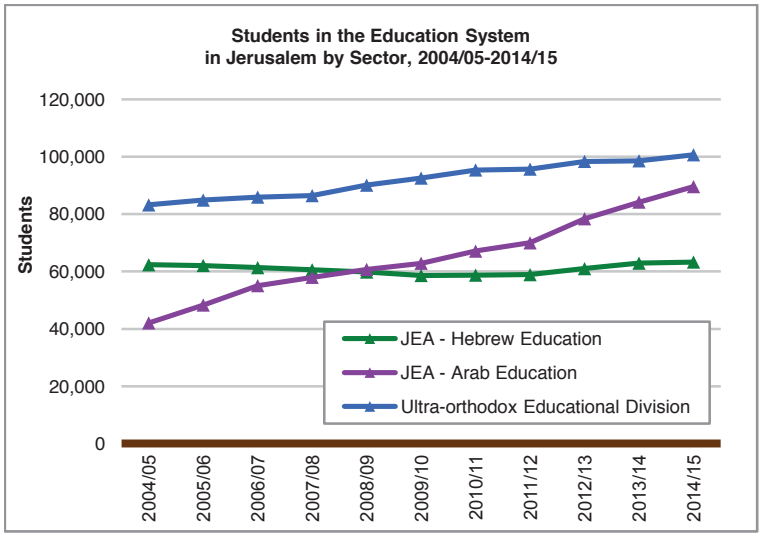
[30] The gross added value is the total gross output after deducting total input.

- Education -

The education system in Jerusalem

Jerusalem's education system is the largest, most diverse, and most complex municipal education system in Israel. It must address the needs of diverse populations with distinct characteristics. The four main sectors in Jerusalem's education system are: state, state-religious, ultra-orthodox, and Arab. Educational institutions in the Jerusalem education system across all these sectors have differing legal status, as the system comprises official public schools, recognized but unofficial schools, municipal schools, and private schools.

The diversity of Jerusalem's population is reflected in the diversity of its schools. No other city in Israel offers its residents such a large selection of schools. The state and state-religious education system includes schools that specialize in science alongside schools that specialize in art or music and dance, schools that cultivate academic excellence, and joint religious-secular or Jewish-Arab schools. The ultra-orthodox education system also includes a wide variety of schools: municipal, private, Talmud Torah, schools belonging to the independent education system, and schools belonging to the Ma'ayan Hachinuch Hatorani network. The Arab education system includes official public schools, recognized but unofficial schools, municipal schools, and private schools.



During the 2014/2015 academic year, approximately 274,600 students were enrolled in the Jerusalem education system: within the Jerusalem Education Administration (JEA), 63,300 students were enrolled in the Hebrew state, state-religious, and state-ultra-orthodox[31]

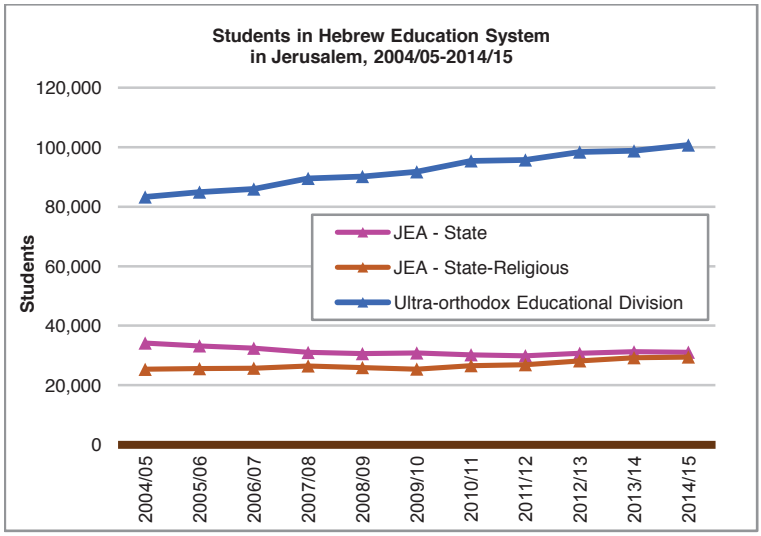
[31] A total of 500 students were enrolled in state-ultra-orthodox schools.

education system, while 100,700 students were enrolled in the Municipality's Haredi Education Division. A total of 89,600 students were enrolled in the Arab public education system, and 21,000 students were enrolled in private Arab schools (2000/2001 assessment).

During the past five academic years (2010/2011 – 2014/2015), the number of students in Jerusalem's education system[32] increased by 13%, from 217,600 to 248,200. The number of students in the Hebrew JEA system (state, state-religious, and state-ultra-orthodox) increased by 8% (from 58,600 to 63,000), and the number of students in the ultra-orthodox sector increased by 6% (from 90,000 to 95,700). In the Arab sector the number of students increased by 30% (from 69,000 to 89,600) (see Arab education).

Hebrew education

During the 2014/2015 academic year, 164,000 students[33] were enrolled in the Hebrew education system in Jerusalem: a total of 63,300 students (39%) were enrolled in the Hebrew state, state-religious, and state-ultra-orthodox system, and 100,700 (61%) students were enrolled in the Haredi Education Division. The distribution of students in the Hebrew JEA education system was as follows: 11,700 children in kindergarten, 24,600 students in elementary school, and 24,800 students in secondary school. A total of 2,200 students were enrolled in special education schools. The distribution of students in the Hebrew ultra-orthodox education system was as follows: 23,800 children in kindergarten, 47,400 students in elementary school, and 27,000 students in secondary school. A total of 2,500 students were enrolled in special education schools.



[32] Not including grades 13 and 14 and private Arab schools.

[33] Including grades 13 and 14.

An analysis of the patterns of change in the number of students indicates different rates of growth among the various educational sectors. During the past five academic years (2010/2011 – 2014/2015), as noted, there has been an 8% increase in the number of students enrolled in the Hebrew JEA system (state, state-religious, and state-ultra-orthodox), from 58,600 to 63,000. An examination of the state and state-religious educational sectors[34] – each one separately – indicates a 3% increase in the number of students in the state education system (from 30,100 to 31,000) and an 11% increase in the number of students in the state-religious education system (from 26,400 to 29,300).

Arab education

During the 2014/2015 academic year, 110,600 students were enrolled in Jerusalem's Arab education system, 89,600 of whom were enrolled in public schools.[35] The number of students enrolled in private schools was estimated at 21,000 (2000/2001 assessment). Students in the Arab education system (public and private) constituted 40% of all students in the Jerusalem education system.

The distribution of students in public education was as follows: 15,600 children in kindergarten, 43,700 students in elementary school, and 24,500 students in secondary school. Approximately 2,000 students were enrolled in special education schools.

Since the 2000s there has been a significant increase in the number of students enrolled in public Arab education. In 2001/2002, there were 33,200 students. This figure rose to 43,500 in 2003/2004, to 78,400 in 2012/2013, and to 89,600 in 2014/2015. The notable increase results from an increase in the number of students in municipal and private schools that were recognized by the Ministry of Education and thus became "recognized but unofficial" schools (which belong to the municipal sector). Since the early 2000s, these schools have been included in the registry of schools and registry of students of the Municipality's Jerusalem Education Administration. In 2001/2002, the number of students in grades 1-12 in recognized unofficial schools was 1,500; the number rose to 8,300 in 2004/2005 and reached 33,400 in 2014/2015.

Eligibility for matriculation

In 2012/2013, the total number of 12th grade students who were Jerusalem residents and enrolled in schools that prepare students for matriculation examinations (state, state-religious, independent ultra-orthodox, and municipal Arab schools) stood at 5,637. Of these, 71% took the matriculation exams. The percentage of those who qualified for a matriculation certificate among 12th grade students who were Jerusalem residents was 44%, compared to 56% in Israel. Notably, these data include only 12th grade students enrolled in schools that prepare students for matriculation exams. For the most part, however, among schools in the ultra-orthodox and Arab sectors that prepare students for

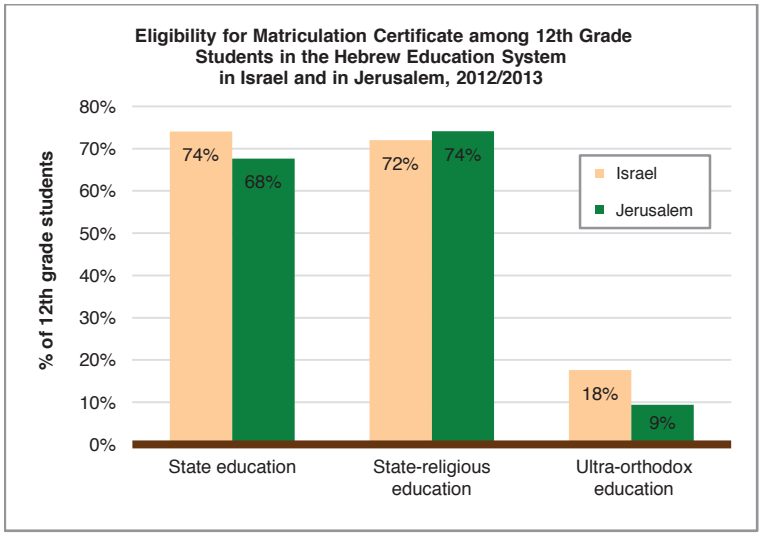
[34] Not including special education and grades 13 and 14.
[35] Official schools and recognized but unofficial schools.

matriculation exams, few students actually elect to take the exams. Yet even if only one student in a school sits for the exams, all 12th grade students from that school will be counted. This method of calculation creates a downward deviation in the rate of eligibility for matriculation, because every school that participates in the matriculation curriculum reduces the overall percentage of students eligible for the certificate.

Therefore, given the complex education system in Jerusalem, it is important to assess the rate of eligibility for each of the sectors separately: The statistics of the Municipality of Jerusalem for 2012/2013 indicate that the state-religious education system had the highest percentage of 12th grade students taking the matriculation exams, at 93%. Within the state education system, 90% of 12th grade students took the exams, and in the Arab education system the figure was 82%. Among ultra-orthodox schools that prepare students for matriculation exams, 35% of 12th grade students took the exams.

In terms of eligibility rates among 12th grade students, during the 2012/2013 academic year, the highest eligibility rate in Jerusalem was recorded among schools in the state-religious sector, at 74%. The eligibility rate among state schools was lower, at 68%. The eligibility rate among Arab schools (that prepare students for matriculation exams) was 19%, and in the ultra-orthodox sector the figure was 9%.

The rate of eligibility for matriculation certificates among state-religious schools in Jerusalem (74%) was higher than the rate for Israel (72%), while among state schools in Jerusalem, the figure (68%) was lower than that of Israel (74%). Within the ultra-orthodox sector the eligibility rate in Jerusalem (9%) was lower than that of the ultra-orthodox sector in Israel (18%), as it was for the Arab sector, where the eligibility rate in Jerusalem (19%) was lower than that of Israel (56%).



In addition to the eligibility rate for the matriculation certificate, the percentage of 12th grade students meeting the threshold requirements for acceptance to universities[36] was measured. In 2012/2013, among 12th grade students in the state-religious education system in Jerusalem, 65% met the universities' threshold requirements. This was slightly higher than the figure for the state education system, at 62%. In the Arab and ultra-orthodox sectors the percentages were much lower, at 14% and 6%, respectively.

Within the Arab sector in Jerusalem, most students do not take the standard Israeli matriculation examinations. A majority of schools in the Arab sector in Jerusalem follow the Palestinian curriculum and sit for matriculation exams known as *taugi'a*. Those who successfully pass the *taugi'a* exams are eligible to apply to universities of the Palestinian Authority and universities in Arab countries. Higher education institutions in Israel regard the *taugi'a* as they do any non-Israeli matriculation certificate, and its holders must complete a preparatory program if they wish to enroll in specific university or college.

During the 2012/2013 academic year, about 89% of 12th grade students in municipal schools within the Arab sector (not including recognized but unofficial schools or private schools) took the *taugi'a* examinations. The eligibility rate for the *taugi'a* certificate among 12th grade students was 52%.

Higher education

In 2012/2013, Jerusalem's institutions of higher education had a total of 38,100 students, constituting 15% of all higher education students in Israel. Of those, 20,300 students (53%) were enrolled at the Hebrew University,[37] 11,800 students (31%) were enrolled in the city's seven academic colleges, and 6,000 students (16%) were enrolled in the five teacher training colleges.[38]

The percentage of students studying at the Hebrew University out of all those in institutions of higher education in Jerusalem (53%) was slightly higher than the figure for Israel (48%). The percentage enrolled in academic colleges was lower than the figure for Israel (31% and 40%, respectively), and the percentage of students in teacher training colleges in Jerusalem was comparable to the figure for Israel (16% and 12%, respectively).

The distribution of students by academic degree indicates that of the 38,100 students in Jerusalem's institutions of higher education, about 72% were pursuing a first degree, 22% a second degree, and 6% a third degree. By comparison, the percentage of students pursuing a first degree in Jerusalem (72%) was slightly lower than the figure for Israel (75%), but the figures were comparable among those studying for a second degree (22% in

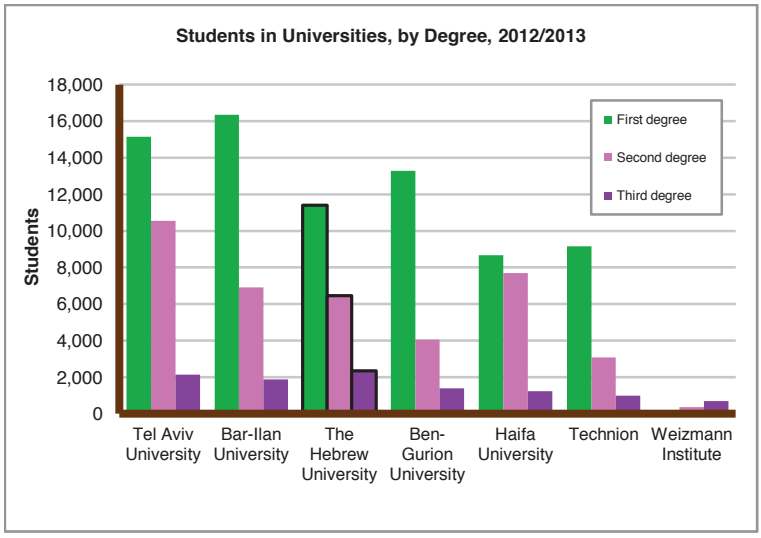
[36] Threshold acceptance requirements include a matriculation certificate that covers all mandatory subjects including, among others, at least three units of mathematics, four units of English, and another advanced subject (five units).

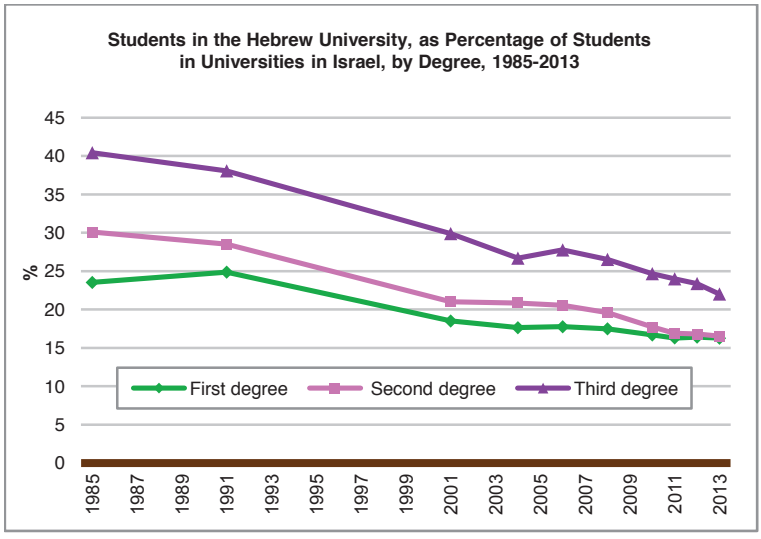
[37] This figure includes the Hebrew University campus in Rehovot.

[38] This includes only institutions recognized by the Council for Higher Education.

Jerusalem and 21% in Israel). With regard to a third degree, the percentage for Jerusalem was slightly higher than for Israel (6% in Jerusalem and 4% in Israel).

During the 2012/2013 academic year, about 20,300 students were enrolled at the Hebrew University: 56% for a first degree, 32% for a second degree, 12% for a third degree, and 1% for a diploma. The distribution of students by faculty was as follows: 27% in social sciences, 21% in humanities, 19% in natural sciences and mathematics, 17% in medicine (including medical support professions), 9% in agriculture, 6% in law, and 1% in engineering.

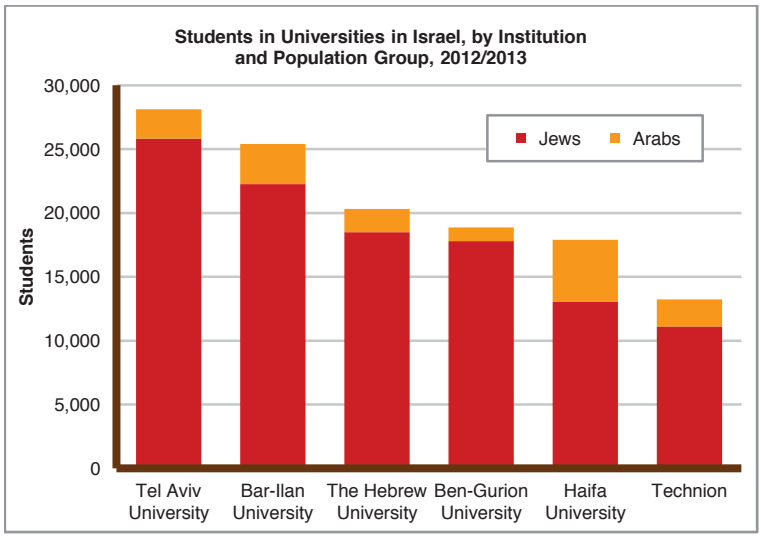




In the 2012/2013 academic year, Tel Aviv University had the highest number of registered students, at 28,100, followed by Bar-Ilan University with 25,400 students and the Hebrew University with, as noted, 20,300 students.

Among Israel's universities, the Hebrew University had the highest number of registered students pursuing a third degree, at 2,300, constituting 22% of all third-degree students in Israeli universities. By comparison, Tel Aviv University had 2,100 third-degree students (20%) and Bar-Ilan University had 1,900 (18%). It should be noted that for many years the Hebrew University had the highest number and proportion of third-degree students among Israel's universities. In 1984/1985, for example, third-degree students at the Hebrew University constituted 40% of all third-degree students at Israel's universities, but their proportion steadily declined to 30% in 2000/2001 and to 22% in 2012/2013. Nonetheless, the Hebrew University still has the highest number and proportion of third-degree students compared with other universities.

In the 2012/2013 academic year, 88% of students in Israel's universities were Jewish and 12% Arab. The higher the degree being pursued, the lower is the proportion of Arab students. Among first-degree students, Arabs constituted 15%; their proportion declined to 9% for second degree and to 5% for third degree. Among Hebrew University students, 91% were Jewish and 9% were Arab. The highest percentage of Arab students was recorded at Haifa University (27%) and the lowest at Ben-Gurion University (6%).



In terms of gender distribution, there are more women than men enrolled in Israel's universities. During the 2012/2013 academic year, 56% of students at universities in Israel were women. At the Hebrew University the proportion of women was comparable to the figure for Israel, at 55%. The highest percentages of women were recorded at Haifa University (65%) and Bar-Ilan University (64%), and the lowest was at the Technion – Israel Institute of Technology (35%).

- Housing and Construction -

Apartments

As of the end of 2014, Jerusalem had 211,490 residential apartments[39]: 159,810 apartments (76%) in neighborhoods with a Jewish majority and 51,210 apartments (24%) in neighborhoods with an Arab majority. The percentage of apartments in Jewish neighborhoods (76%) was greater than the percentage of Jerusalem's Jewish population, which stood at 63% at the close of 2013. The percentage of apartments in Arab neighborhoods (24%) was lower than the percentage of Jerusalem's Arab population, at 37%. The reason for this discrepancy is the relatively large size of households within the Arab population. In 2013 the average household size for Jerusalem's Arab population was 5.7 persons, compared with 3.3 for the Jewish population.

The average area of an apartment in Jerusalem was 81 square meters (m^2). During 2003-2014, the average area of an apartment in Jerusalem increased by 5 m^2, from 76 to 81 m^2. In 2014 the average area of an apartment in neighborhoods with a majority Jewish population was comparable to that in neighborhoods with a majority Arab population – 81 and 79 m^2, respectively.

The average housing density (defined as the average area per person) in Jerusalem was 21 m^2 per person. The average housing density in neighborhoods with a majority Jewish population (25 m^2 per person) was significantly lower than the average for neighborhoods with a majority Arab population (13 m^2 per person). Average housing density also varied among neighborhoods with a majority Jewish population. Neighborhoods with a majority ultra-orthodox population[40] had a higher average housing density (18 m^2 per person) than neighborhoods with a majority general Jewish population – secular, traditional, and religiously observant (28 m^2 per person). The discrepancy in average housing density between Jewish and Arab neighborhoods and between ultra-orthodox and general Jewish neighborhoods stems from the relatively large households characteristic of the Arab and ultra-orthodox sectors.

The Jewish neighborhoods that recorded the smallest average apartment size were Katamon Tet and the vicinity of Hamadregot St. in Nahlaot (48 m^2) and the vicinity of Shilo St. in Nahlaot (51 m^2). Neighborhoods with the largest average apartment size were the vicinity of Hahoresh Rd. in Ramot Alon (145 m^2), Motza Tahtit and Ramat Motza (134 m^2), Malha (129 m^2), the vicinity of Avraham Raful St. in Pisgat Ze'ev (125 m^2), and Yemin Moshe, Abu Tor, and North Talpiot (125 m^2).

The Arab neighborhoods that recorded the smallest average apartment size were the Muslim Quarter (45 m^2), the Christian Quarter (46 m^2), the Armenian Quarter (61 m^2), and Silwan (61 m^2). Neighborhoods with the largest average apartment size were Beit Hanina (97 m^2), Kafr 'Akb and Atarot (91 m^2), New Anata (88 m^2), and Beit Zafafa (87 m^2).

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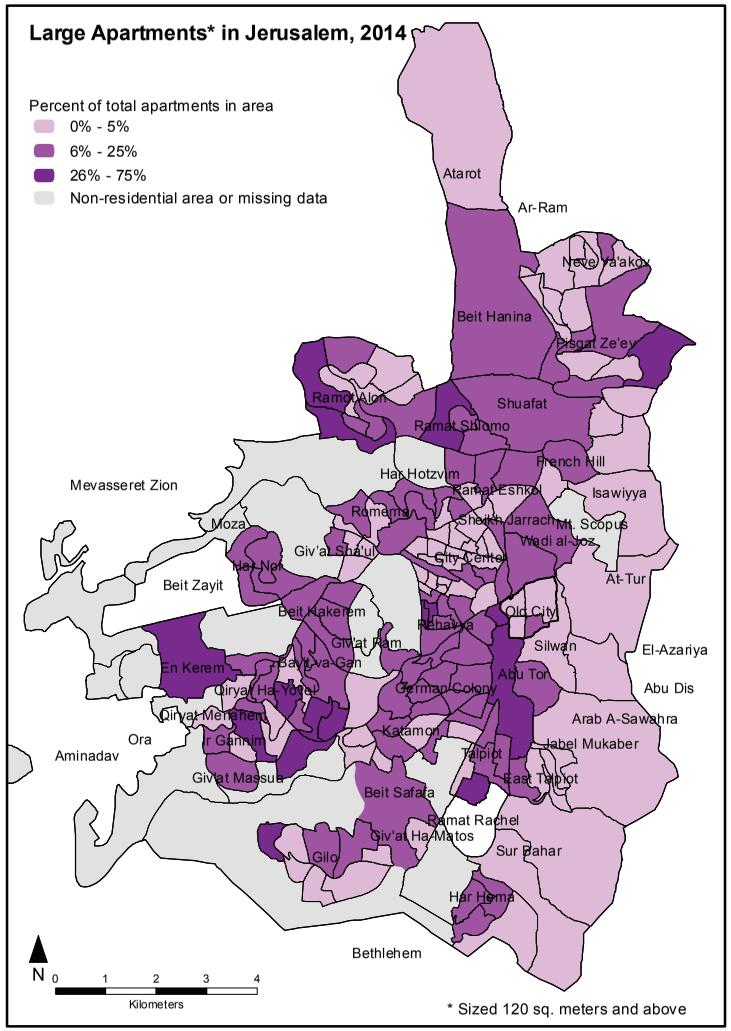
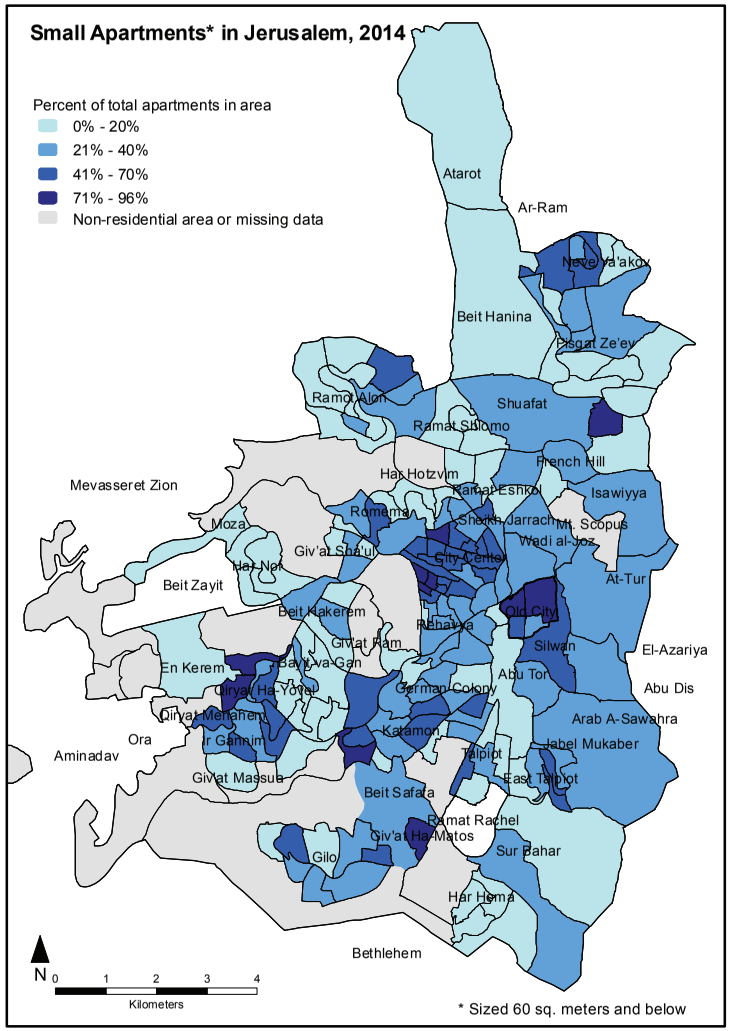
39 This figure is based on data for the collection of *arnona*, the municipal tax.

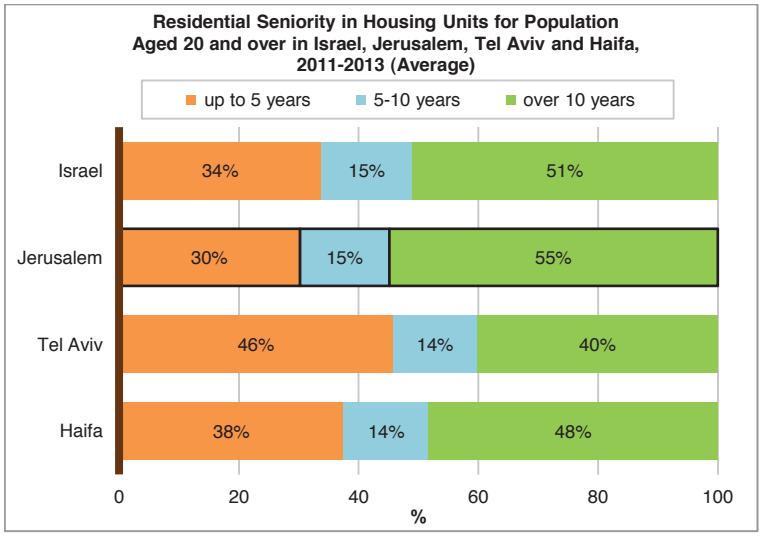
40 See footnote 4.


Large Apartments* in Jerusalem, 2014
Percent of total apartments in area
0% - 5%
6% - 25%
26% - 75%
Non-residential area or missing data
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Moza
Romema
Sheikh Jarrach
Mt. Scopus
Giv'at Sha'ul
Wadi al-Joz
City Center
Hai Nof
At-Tur
Beit Zayit
Beit Hakerem
Old City
Rehavia
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit Va-Gan
Abu Tor
Abu Dis
Qiryat Ha-Yovel
German Colony
Qiryat Menahem
Arab A-Sawahra
Ora
Katamon
Ir Gannim
Talpiot
Jabel Mukaber
Aminadav
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Giv'at Ha-Matos
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers
* Sized 120 sq. meters and above


Small Apartments* in Jerusalem, 2014
Percent of total apartments in area
0% - 20%
21% - 40%
41% - 70%
71% - 96%
Non-residential area or missing data
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Moza
Romema
Sheikh Jarrach
Mt. Scopus
Giv'at Sha'ul
Wadi al-Joz
City Center
Hai Nof
At-Tur
Beit Zayit
Beit Hakerem
Old City
Rehavia
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit Va-Gan
Abu Tor
Abu Dis
Qiryat Ha-Yovel
German Colony
Qiryat Menahem
Arab A-Sawahra
Ora
Katamon
Ir Gannim
Talpiot
Jabel Mukaber
Aminadav
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Giv'at Ha-Matos
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers
* Sized 60 sq. meters and below

The Social Survey of the Central Bureau of Statistics indicates that during the period 2011-2013 (on average), 83% of Jerusalem residents aged 20 and above were satisfied or very satisfied with their residential apartment. This is the same as the figure recorded for Haifa and comparable to the figures for Israel and Tel Aviv (85%-86%) but lower than the figure for Rishon Lezion (91%). Regarding their area of residence, 83% of Jerusalem residents aged 20 and above were satisfied or very satisfied. The figure for Jerusalem is comparable the figures for Israel, Haifa, and Ashdod (82%-85%).

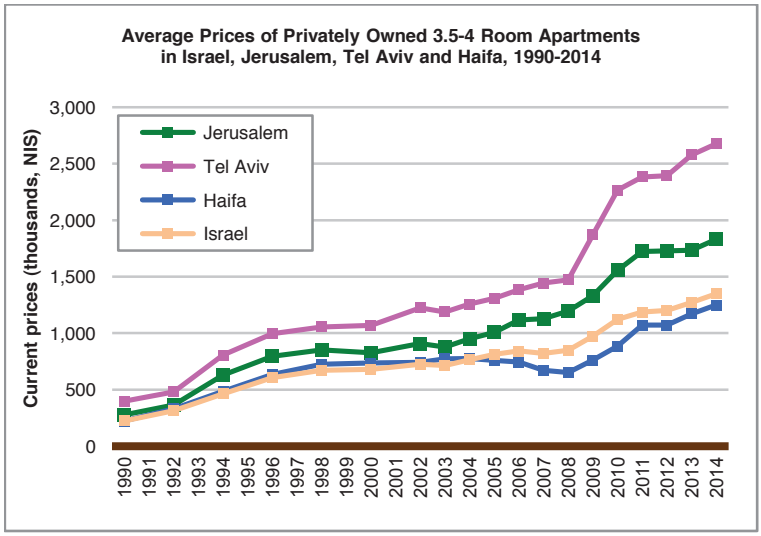
The Social Survey also examined duration of residence in the apartment. It found that during the years 2011-2013 (on average), Jerusalem had the highest percentage of residents who had resided in their current apartment for more than 10 years, at 55% (among cities with a population of more than 200,000). In Israel and Rishon Lezion, 50%-51% of residents had resided in their current apartment for more than 10 years, and in Tel Aviv the figure was only 40%. Nearly a third (30%) of Jerusalem residents had resided in their current apartment for a period of less than 5 years. In Israel and Rishon Lezion this figure was 33%-34%, and in Tel Aviv it was 46%.



Apartment prices

During the past five years apartment prices have increased in Jerusalem as well as Israel at large. For example, the average price of a 3.5-4 room (privately owned) apartment in Jerusalem rose from NIS 1,555,900 in 2010 to NIS 1,856,100 in 2014 – a 19% increase. A comparable increase, 20%, was recorded for Israel. This period was characterized by large fluctuations in apartment prices in Jerusalem. The greatest increase was recorded in 2010, at 17%, as well as the years 2011 and 2014, at 7%-11%. During the years 2010-2011, in contrast, there was only a 1% increase.

In 2014 the average price for a 3.5-4 room apartment in Jerusalem – NIS 1,856,100 – was higher than the average for Israel (NIS 1,342,500) and Haifa (NIS 1,245,100) but significantly lower than the average for Tel Aviv, at NIS 2,755,000.



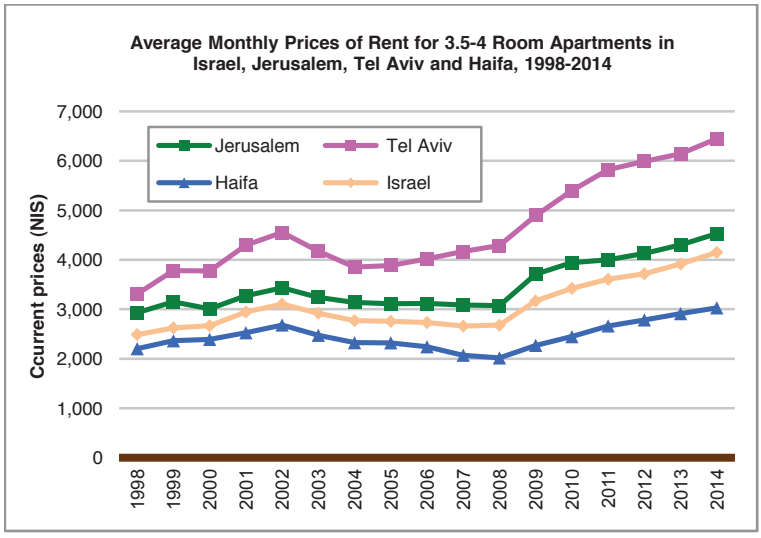
The increase in average apartment prices in Jerusalem varies in accordance with the size of the apartment. The smaller the apartment is, the greater the increase in price. For example, in 2014 there was an 11% increase in 1.5-2 room apartments in Jerusalem, compared with a 9% increase in 2.5-3 room apartments and a 7% increase in 3.5-4 room apartments. Tel Aviv and Israel recorded comparable trends.

During the past five years average rental prices have also risen in both Jerusalem and Israel at large. For example, the average rent for a 3.5-4 room apartment in Jerusalem rose from NIS 3,900 in 2010 to NIS 4,500 in 2014 – a 14% increase. During the same period Israel recorded a 20% increase in rent for 3.5-4 room apartments, from NIS 3,400 to NIS 4,100. A comparison between the average increase in rent for a 3.5-4 room apartment in Jerusalem and the average increase in price for a privately owned 3.5-4 room apartment in Jerusalem indicates that the average increase in rent (14%) was lower than the average increase in apartment prices (19%). In Israel the increase was the same, at 20%.

In 2014 the average rent for a 3.5-4 room apartment in Jerusalem was NIS 4,500. This is higher than the average rent in Israel (NIS 4,100) and Haifa (NIS 3,000), and significantly lower than the average in Tel Aviv, at NIS 6,400. Similar differences in rent apply to apartments of other sizes as well.

Since 2009 there has been a steady increase in rental prices in both Jerusalem and Israel at large. The greatest average increase in rent was recorded in 2009 for 3.5-4 room apartments: 21% in Jerusalem and 18% in Israel. In subsequent years the increase was

more moderate: 1%-6% per year in Jerusalem and 3%-8% in Israel. In 2014 Jerusalem recorded a 5% increase in average rent for 3.5-4 room apartments, as did Israel. Tel Aviv recorded a 4% increase.

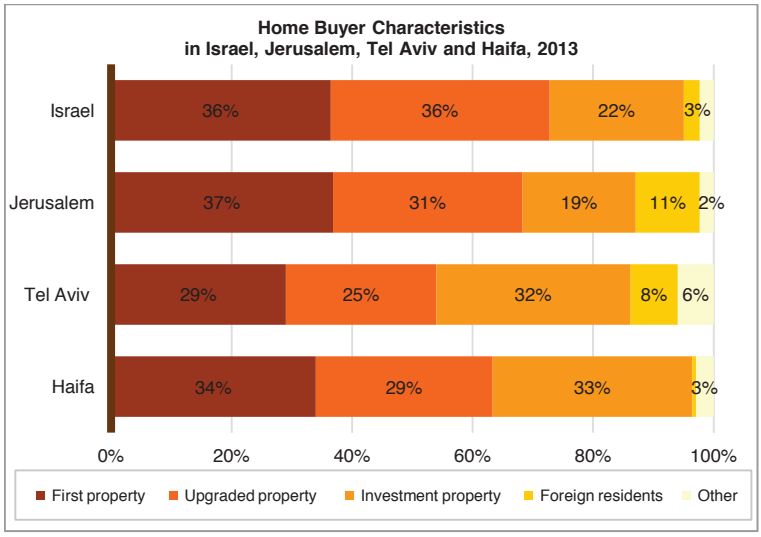


The average increase in rent for apartments in Jerusalem varies in accordance with the size of the apartment. The smaller the apartment is, the smaller the increase. For example, in 2014 there was a 1% increase in rent for 1.5-2 room apartments in Jerusalem, compared with a 4% increase for 2.5-3 room apartments and a 5% increase for 3.5-4 room apartments. Similar trends were recorded in Israel and in Tel Aviv.

Among apartment purchasers in Jerusalem in 2013, 37% were first-time home buyers. This is the same as the figure for Israel and higher than the figures for Haifa (34%) and Tel Aviv (29%). Those upgrading their housing[41] constituted 31% of purchasers in Jerusalem. This is lower than the figure for Israel (36%), comparable to that of Haifa (29%), and higher than that of Tel Aviv (25%). Those purchasing an apartment as an investment (purchasers who already own an apartment) constituted 19% of purchasers in Jerusalem. This is slightly lower than the figure for Israel (22%) and significantly lower than the figures for Tel Aviv (32%) and Haifa (33%). Foreign residents[42] constituted 11% of apartment purchasers in Jerusalem. This is the highest percentage among cities of 100,000 or more residents. In Tel Aviv, as in Netanya, 8% of apartment purchasers were foreign residents.

[41] These include purchasers of a single apartment that is not their first as well as purchasers of an additional apartment who declared that they would sell their previous apartment within two years.

[42] These include foreign residents who purchased an apartment in Israel for residence or as an investment.



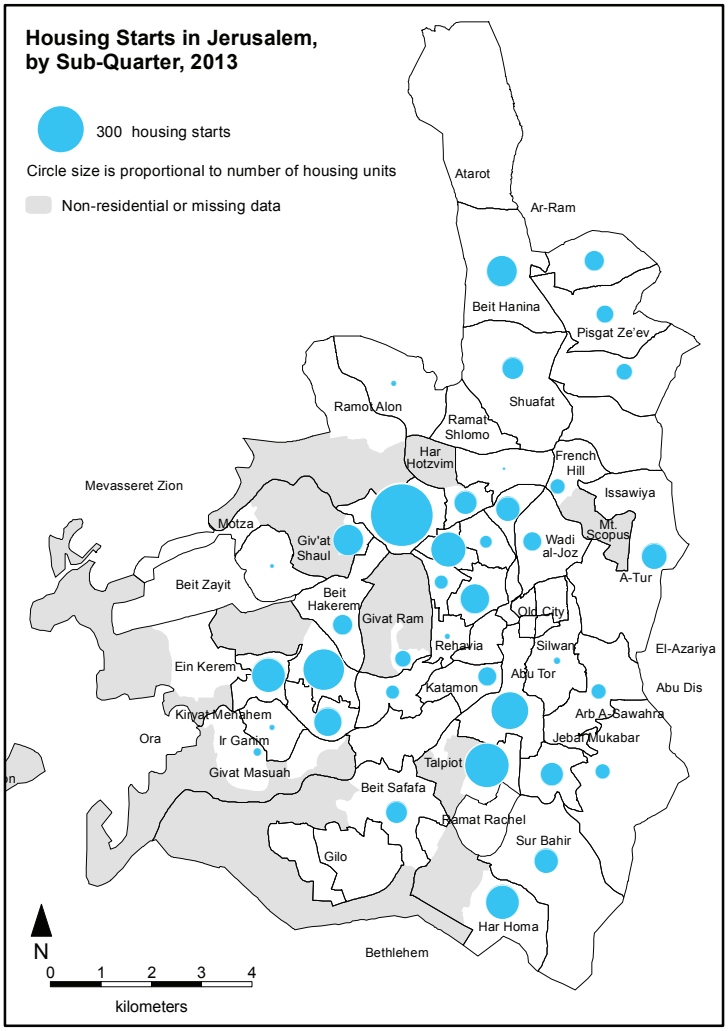
Construction starts[43]

The year 2013 set a record for construction starts in Jerusalem, and 2014 continued this trend. During this year construction was initiated on 3,700 residential apartments, the greatest number of housing starts in Jerusalem during the past twenty years.

The number of new apartments whose construction was initiated during 2013-2014 was significantly higher than the figure for 2011-2012, when there were 2,300 housing starts on average per year. The neighborhoods with the highest numbers of housing starts in 2014 were Har Homa (540 apartments – 15% of the total), Bak'a, Abu Tor, and Yemin Moshe (400 – 11%), Neve Ya'akov (370 – 10%), and Romema (350 – 10%).

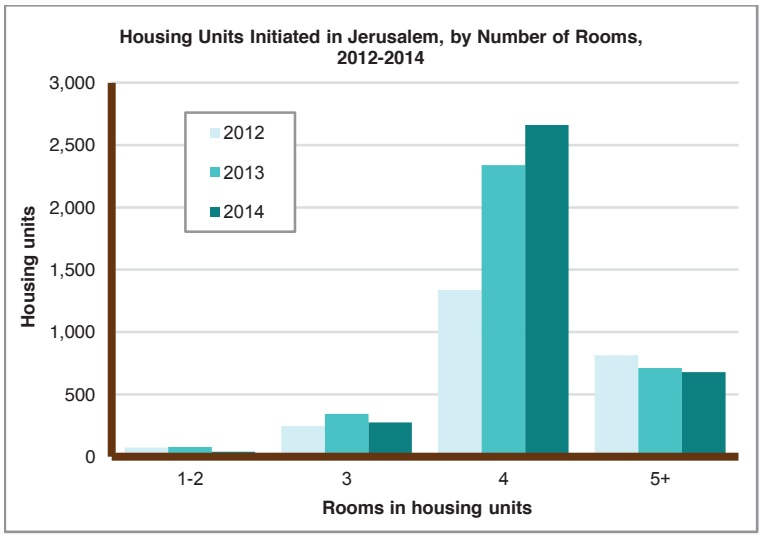
With respect to the number of rooms in apartments whose construction was initiated, apparently small apartments are a rare commodity. In 2014 only 1% of housing starts comprised 1-2 rooms. Most apartments (73%) whose construction was initiated in 2014 had 4 rooms. In Tel Aviv, by comparison, 44% of housing starts had 4 rooms, and in Israel the figure was 43%. Tel Aviv recorded the highest percentage of small apartments: 9% of housing starts comprised 1-2 rooms, and 28% comprised 3 rooms.

[43] The data about construction starts and completions are drawn from the Central Bureau of Statistics' table generator on construction, http://www.cbs.gov.il/reader/bnia/bnial.html (Hebrew). The data extracted from the generator differ slightly from the data on construction that appear in the *Statistical Yearbook of Jerusalem*.



Housing starts in Israel, Jerusalem, Tel Aviv and Haifa by number of rooms, 2014

	Total number of apartments	Total	1-2 rooms	3 rooms	4 rooms	5 or more rooms
		Percent				
Israel	43,500	100	1	4	43	52
Jerusalem	**3,700**	**100**	**1**	**8**	**73**	**19**
Tel Aviv	2,100	100	9	28	44	18
Haifa	770	100	0	2	70	27



The total area covered by construction starts for all purposes in Jerusalem in 2014 was 813,300 m^2. This constituted 8% of the total area of construction starts in Israel, which is higher than the total for Tel Aviv (547,200 m^2 – 5%) and significantly higher than the total for Haifa (112,100 m^2 – 1%). In 2014 in Jerusalem, 82% of the area covered by construction starts constituted housing starts. The figure for Israel was comparable, at 80%. In Tel Aviv 62% of the area covered by construction starts was for residential purposes. Other salient purposes in Jerusalem included office space (10%) and education (3%). In Tel Aviv the main purposes aside from residential were office space (25%) and transportation and telecommunications (6%).

Construction completions

The year 2013 also set a record for construction completions in Jerusalem, and 2014 continued this trend. During this year construction was completed on some 2,500 residential apartments, and during these two years the number of housing completions was the highest Jerusalem had recorded in the past decade. The number of housing completions during 2013-2014 was significantly higher than during 2011-2012, when 1,300-1,800 residential apartments were completed. In general, the increase in the number of apartments constructed reflects increased demand, alongside efforts by planning authorities to expedite the construction of housing units. The increased demand for housing is related to demographic factors, especially population growth, an increase in the number of households, and apartment purchases by foreign residents.

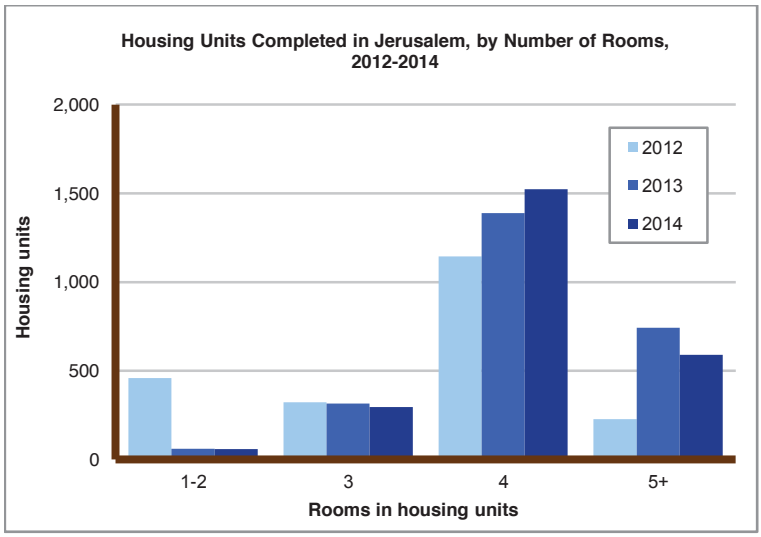
Housing completions in 2014 were concentrated in Nayot and Mishkenot Ha'uma (290 apartments – 12% of total), Romema (220 – 9%), the City Center (140 – 6%), and Gilo (140 – 6%).

Most of the apartments completed in Jerusalem in 2014 comprised 4 rooms (62%). Apartments with 5 or more rooms constituted 24%, and apartments with 1-2 rooms

constituted only 2%. The distribution differs for Israel and Tel Aviv. The proportion of large apartments in Israel overall is notable: 55% of housing completions comprised 5 or more rooms, and 37% comprised 4 rooms. In Tel Aviv, by comparison, the proportion of small apartments is notable: 46% of housing completions comprised 1-2 rooms and 18% comprised 3 rooms.

Housing completions in Israel, Jerusalem, Tel Aviv and Haifa by number of rooms, 2014

	Total number of apartments	Total	1-2 rooms	3 rooms	4 rooms	5 or more rooms
		Percent				
Israel	44,800	100	4	4	37	55
Jerusalem	**2,500**	**100**	**2**	**12**	**62**	**24**
Tel Aviv	3,300	100	46	18	19	18
Haifa	740	100	1	5	49	44



The total area covered by construction completions for all purposes in Jerusalem in 2014 was 600,400 m^2. This constituted 5% of the area covered by all construction completions in Israel, which is slightly higher than the area for Tel Aviv (568,600 m^2 – 5%), and double the total for Haifa (295,600 m^2 – 3%). In 2014 in Jerusalem, 78% of the area covered by construction completions was for residential purposes. The figure for Israel is comparable, at 77%. In Tel Aviv 72% of construction completions were for residential purposes. Other salient purposes in Jerusalem were industry and storage (7%) and commerce (5%). In Tel Aviv the main purposes aside from residential were office space (12%), commerce (4%), and accommodation services (4%).

- Tourism -

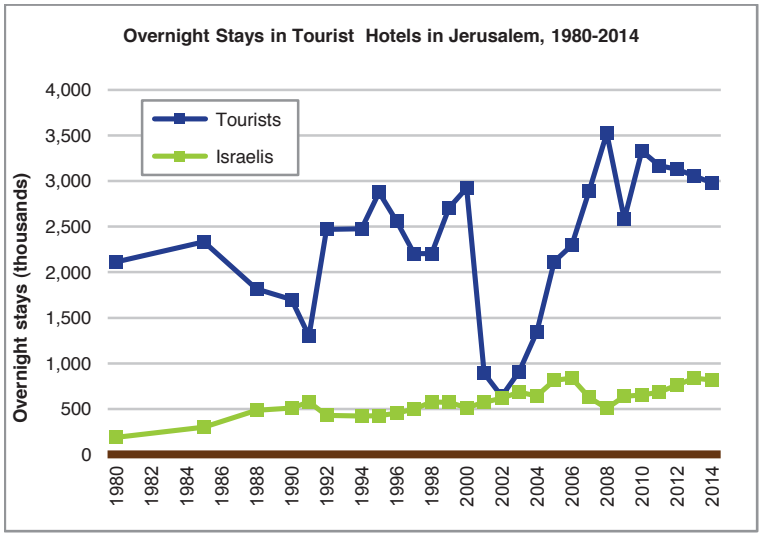
Tourist hotels

Jerusalem attracts visitors from around the country and the world because of its unique cultural and religious heritage and its status as the capital of Israel, a center for the Jewish people, and a city holy to the three monotheistic religions, as well as its rich variety of religious, historical, archeological, and cultural sites.

At the close of 2014, Jerusalem had 75 tourist hotels[44] with a total of 9,800 rooms, constituting 20% of all rooms in Israel's tourist hotels. By comparison, there were 11,000 rooms in Eilat (22%), 7,200 rooms in Tel Aviv (14%), 4,100 at the Dead Sea (8%), and 1,500 in Haifa (3%).

Guests and overnight stays

In 2014 the number of guests in Jerusalem hotels totaled 1,333,300, of whom 66% were overseas tourists and 34% were Israelis. Among overseas tourists, 45% came from the Americas (mostly North and Central America) and 36% from Europe. In 2014 Jerusalem's tourist hotels had fewer guests than in 2013 (1,386,500) or in 2012 (1,348,700). The number of overseas guests in 2014 was 878,500, which was lower than the figure for 2013 (898,300) and 2012 (917,200). The number of Israeli guests was 454,900, which was lower than the figure for 2013 (488,200) but higher than the figure for 2012 (431,500).



[44] Tourist hotels include hotels and guesthouses registered with the Ministry of Tourism, on the basis of which the Central Bureau of Statistics prepares its analysis.

In 2014 the number of overnight stays in Jerusalem hotels totaled 3,797,200, of which there were 2,982,000 (79%) overnight stays of overseas tourists and 815,200 (21%) of Israelis. Overnight stays in Jerusalem hotels constituted 17% of the total number of overnight stays in Israel. The number of overnight stays in Jerusalem in 2014 was lower than the figures for 2013 (3,893,300) and 2012 (3,892,000). The number of overnight stays of overseas tourists totaled 2,982,000, compared with 3,057,100 in 2013 and 3,129,600 in 2012. The number of overnight stays of Israelis in 2014 totaled 815,200, compared with 836,200 in 2013 and 762,400 in 2012.

In 2014 the average number of overnight stays per guest in Jerusalem hotels (for overseas tourists and Israelis) was 2.8. The average number of overnight stays for overseas tourists was 3.4, which is the same as the average for the past two years. The average number of overnight stays for Israelis was 1.8, which is comparable to the average for 2013, at 1.7.

In 2014 the average number of overnight stays for overseas tourists in Jerusalem (3.4) was slightly higher than the average in Tel Aviv (3.1) and Haifa (2.9) and lower than the average in Eilat (4.3). The average number of overnight stays of Israelis in Jerusalem (1.8) was slightly higher than the average in Tel Aviv (1.7) and Haifa (1.7) and lower than in Eilat (2.8). The average number of overnight stays of overseas tourists is directly related to the variety and nature of the tourist attractions in each city, its geographic location, and its proximity to other points of interest.

The highest numbers of overnight stays of overseas tourists in Jerusalem for 2014 were recorded in May (388,000), March (318,000), and April (317,400). The months in which the highest numbers of overnight stays of Israelis were recorded were August (127,000), September (94,600), and December (78,500).

In 2014 the room occupancy rate in Jerusalem's tourist hotels was 60% (compared with 64% in 2013 and 2012). The occupancy rates for hotels of different standards were comparable: the highest-ranked hotels (levels I and II) had a 60% occupancy rate, the intermediate-ranked hotels (level III) had a 60% occupancy rate, and the remaining tourist hotels had a 63% rate.

West Jerusalem – East Jerusalem

In 2014, as noted, Jerusalem's tourist hotels hosted 1,333,300 guests, of whom 1,149,700 (86%) stayed in West Jerusalem and 183,700 (14%) stayed in East Jerusalem. The number of overnight stays in Jerusalem's tourist hotels during this year totaled 3,797,200, of which 3,262,200 were in West Jerusalem hotels (86%) and 535,000 (14%) were in East Jerusalem hotels. It should be noted that the number of hotel guestrooms in West Jerusalem is significantly higher than in East Jerusalem: 7,900 guestrooms in West Jerusalem (80%) and 2,000 in East Jerusalem (20%). A total of 89% of Jerusalem's hotel revenues was from West Jerusalem hotels.

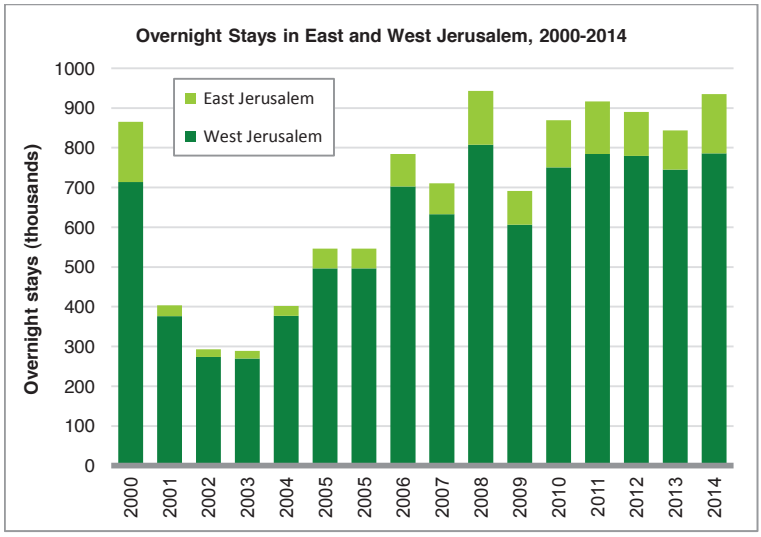
In 2014 tourist hotels in **West Jerusalem** hosted 1,149,700 guests (62% of whom were overseas tourists), compared with 1,225,900 guests in 2013 (61% of whom were overseas tourists), and 1,177,600 guests in 2012 (65% of whom were overseas tourists). The number of overnight stays in West Jerusalem tourist hotels totaled 3,262,200 (76% of which were attributable to overseas tourists), compared with 3,424,200 in 2013 (76% attributable to overseas tourists) and 3,416,300 in 2012 (78% attributable to overseas tourists).

In 2014 the average number of overnight stays for guests in West Jerusalem tourist hotels was 2.8 nights, comparable to the average in East Jerusalem, at 2.9. The average number of overnight stays for an overseas tourist in West Jerusalem was 3.5 nights, compared with 3.0 nights in East Jerusalem. The average for an Israeli guest in West Jerusalem tourist hotels was 1.8 nights, comparable to the average in East Jerusalem, at 1.7.

The room occupancy rate for West Jerusalem hotels in 2014 was 62%, which was lower than the rate recorded in 2012 and 2013 (66%).

In 2014 tourist hotels in **East Jerusalem** hosted 183,700 guests (92% of whom were overseas tourists), compared with 160,600 guests in 2013 (90% of whom were overseas tourists) and 171,200 guests in 2012 (91% of whom were overseas tourists). Overnight stays totaled 535,000 (95% attributable to overseas tourists), which was higher than the figures for 2013, at 469,100 (95% overseas tourists), and 2012, at 475,700 (94% overseas tourists).

The room occupancy rate in East Jerusalem was lower than in West Jerusalem. In East Jerusalem the rate was 53%, which was comparable to the figures for 2012 and 2013 (52%-53%).



Jerusalem compared to select Israeli cities

In 2014 Jerusalem's tourist hotels hosted 1,333,300 guests (15% of the total number of guests at Israel's tourist hotels), compared with 1,085,400 guests in Tel Aviv (12%) and 2,369,200 guests in Eilat (27%).

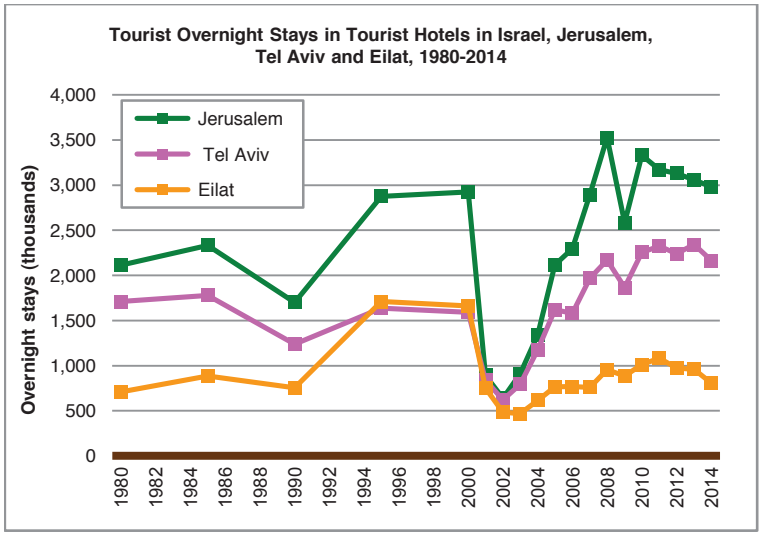
Jerusalem has a strong power of attraction for overseas tourists. The number of overseas hotel guests in Jerusalem was 878,500 (29% of all overseas hotel guests in Israel), compared with 708,800 in Tel Aviv (23%) and 186,800 in Eilat (6%). The number of Israeli hotel guests in Jerusalem was 454,900 (8% of the total for Israel), compared with 376,600 in Tel Aviv (7%) and 2,182,400 in Eilat (38%).

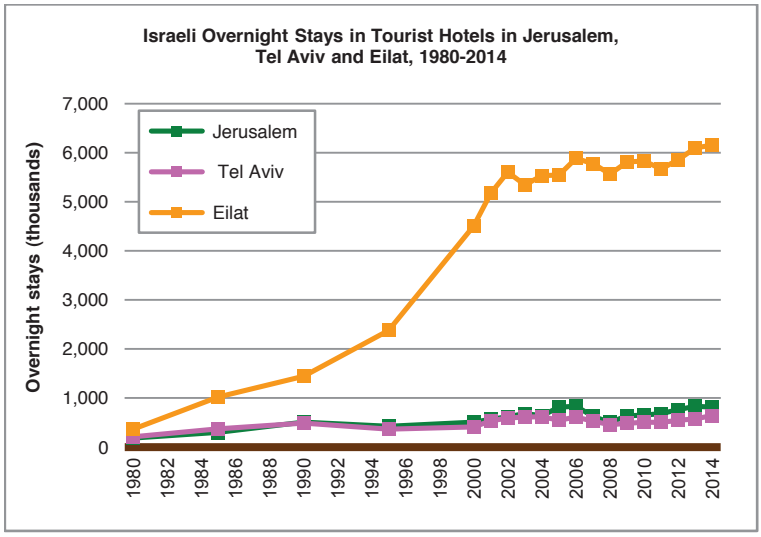
In 2014 the number of overnight stays in Jerusalem's tourist hotels totaled 3,797,200 (17% of the total for Israel), compared with 2,808,800 in Tel Aviv (13%) and 6,965,000 in Eilat (31%). The number of overnight stays of overseas tourists was 2,982,000 in Jerusalem (32% of all overnight stays of overseas tourists in Israel), 2,164,700 in Tel Aviv (24%), and 807,500 in Eilat (9%). The percentage of overnight stays of tourists from the Americas (mostly North America) out of all overnight hotel stays of overseas tourists was especially high in Jerusalem, at 49%, compared with Israel (35%), Haifa (39%), Tel Aviv (31%), and Eilat (11%). For tourists from Europe Jerusalem's power of attraction is not as strong. The percentage of overnight stays of European tourists out of all overnight hotel stays of overseas tourists was 34%, which was lower than the figures for Israel (48%), Eilat (79%), Tel Aviv (52%), and Haifa (41%).

The number of overnight stays of Israelis in Jerusalem, as well as the percentage of such stays in relation to all Israeli overnight stays in Israel, is significantly lower than the figure for overseas tourists. In 2014 the number of overnight stays of Israelis in Jerusalem was 815,200 (6% of all overnight stays of Israelis in Israel), compared with 644,000 for

Tel Aviv (5%) and 6,157,500 for Eilat (48%). Two other destinations preferred by Israelis are the Dead Sea shore, with 1,705,200 overnight stays (13% of all overnight stays of Israelis in Israel), and Tiberias, with 941,100 overnight stays (7%).

The data indicate that Jerusalem is the most attractive city for overseas tourists (foreign tourism) in terms of numbers of hotel guests and overnight stays, while Eilat is the most attractive city for Israeli tourists (domestic tourism). The percentage of overseas tourists' overnight stays out of all overnight stays was very high in Jerusalem (79%), comparable to the figure for Tel Aviv (77%) but higher than the figures for Israel (41%), Haifa (45%), the Dead Sea (24%), and Eilat, where only 12% of overnight stays were attributable to overseas tourists.

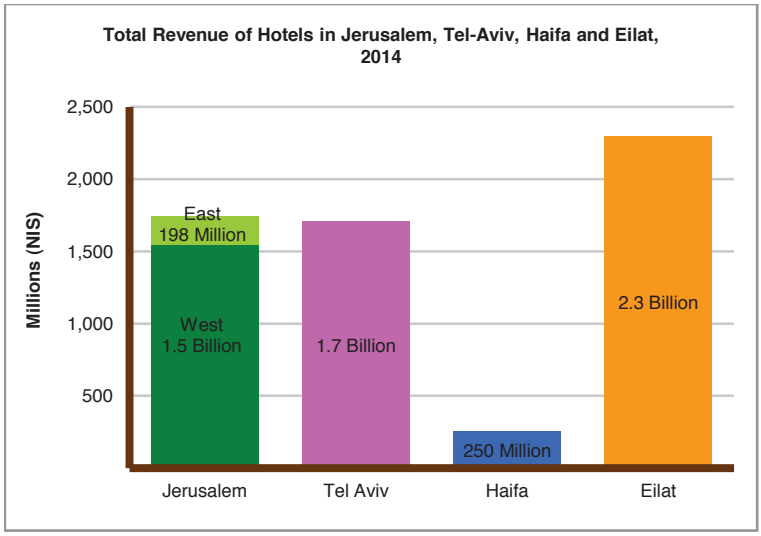




In 2014 the room occupancy rate for Jerusalem was 60%, which was lower than the rate for Eilat (70%) and Tel Aviv (67%).

Revenues

In 2014 the revenues from tourist hotels in Jerusalem totaled NIS 1.74 billion, which amounted to 18% of all revenues from tourist hotels in Israel. The highest revenues came from hotels in Eilat, at NIS 2.30 billion (24%). The revenues from Tel Aviv hotels – NIS 1.70 billion (18%) – were comparable to the figure for Jerusalem, although the numbers of hotel guests and of overnight stays were higher in Jerusalem than in Tel Aviv. The discrepancy results from the lower average price of hotel rooms in Jerusalem compared to Tel Aviv. Dead Sea hotels had revenues of NIS 1.1 billion (12%), and Haifa hotels had revenues of NIS 250 million (3%).

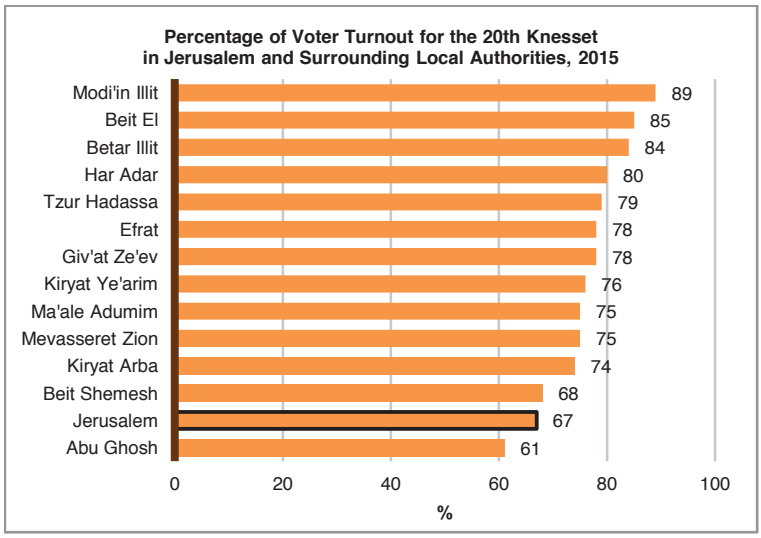


Profile of the tourists

A survey of incoming tourism conducted by the Ministry of Tourism among overseas tourists, which explored the characteristics of tourists visiting Israel, found that 2,240,128 tourists visited Jerusalem in 2013, constituting 79% of all tourists visiting Israel in that year. The survey also found that 63% of tourists who visited Jerusalem that year were Christian, and 19% were Jewish. These figures are comparable to the figures for Israel. Among tourists who visited Tel Aviv, 48% were Christian and 30% were Jewish. The main purposes cited for visiting Jerusalem were as follows: religious visit or pilgrimage (36%), touring (32%), visiting relatives and friends (12%), and leisure and recreation (7%). For Tel Aviv the main purposes were touring (31%), visiting relatives and friends (22%), business and research (14%), and leisure and recreation (13%). The different characteristics of tourists who visit each city and the different purposes of their visits reflect the different points of attraction of each city.

- Elections to the 20th Knesset -

Elections to the 20th Knesset took place in March 2015. The number of eligible voters in Jerusalem was 385,888.[45] The rate of voter turnout (actual voters as a percent of all eligible voters) in Jerusalem was 67%, which was lower than the figure for Israel (72%) but slightly higher than the figures for Tel Aviv (65%) and Haifa (62%). Localities within the environs of Jerusalem, with the exception of Abu Ghosh, recorded higher rates of voter turnout than Jerusalem. The ultra-orthodox cities of Modi'in Illit and Betar Illit, as well as the locality of Beit El, recorded the highest rate of voter turnout (84%-89%). Other localities within the environs of Jerusalem recorded figures of 68%-80%.



The party that received the plurality of votes in Jerusalem was Likud (24%). The next five parties in descending order were United Torah Judaism (21%), Shas (12%), the Zionist Union (10%), the Jewish Home (8%), and Yachad[46] (7%). In Israel at large the distribution of parties differed from the distribution in Jerusalem, although in both cases Likud received a plurality of votes. The next five parties in descending order were the Zionist Union (19%), the Joint List (11%), Yesh Atid (9%), Kulanu (8%) and the Jewish Home (7%). Accordingly, religious and ultra-orthodox parties (United Torah Judaism, Shas, the Jewish Home, and Yachad) received almost half the votes (49%) in Jerusalem. In Israel at large these parties received 20% of the votes. In Tel Aviv and Haifa the two leading parties were the Zionist Union (34% and 25%, respectively) and Likud (18% and 21%, respectively).

[45] Most Arab residents of East Jerusalem have the status of permanent residence and are not citizens of Israel. Thus they have the right to vote in municipal elections but not in Knesset elections.

[46] Yachad did not pass the minimum threshold.

Results of Elections to the 20th Knesset in Israel, Jerusalem, Tel Aviv and Haifa, 2015

			Name of party											
	Eligible voters	Voter turnout	Likud	Zionist Union	Joint List	Yesh Atid	Kulanu	The Jewish Home	Shas	Israel Beitenu	United Torah Judaism	Meretz	Yachad	Other parties
		Percent												
Israel	5,881,696	72	23	19	11	9	8	7	6	5	5	4	3	3
Jerusalem	**385,888**	67	**24**	**10**	**1**	**4**	**5**	**8**	**12**	**2**	**21**	**4**	**7**	**1**
Tel Aviv	403,338	65	18	34	3	12	7	3	4	2	1	13	1	1
Haifa	243,274	62	21	25	8	11	8	5	2	8	3	5	1	1

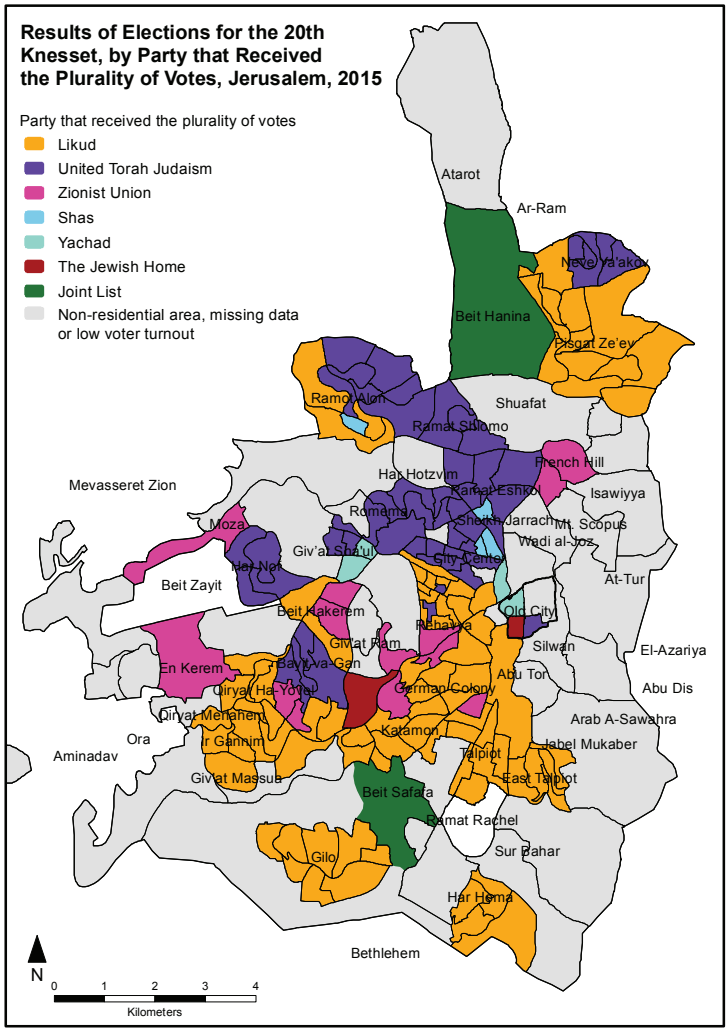
An examination of voting patterns by neighborhood indicates that the highest rates of voter turnout were recorded in Ramat Shlomo (84%), Har Homa (81%), Giv'at Massua (81%), Ramot Alon, Giv'at Sha'ul,[47] Motza Tahtit, and Ramat Motza (77%-79%).

The Likud party received a plurality of the votes in Jerusalem, drawing 24% of the votes. The highest levels of support for this party were recorded in the neighborhoods of Pat (48%), Mekor Haim (47%), Katamon Het and Katamon Tet (46%), and Har Homa (46%). United Torah Judaism is the second-largest party in Jerusalem, drawing 21% of the votes. The highest levels of support for United Torah Judaism were recorded in Kiryat Sanz and Kiryat Belz (92%), Ezrat Torah (83%), and Ramot Polin, Shikun Habad, Romema, Kiryat Matersdorf and Kiryat Unsdorf, and Greater Sanhedria (72%-77%). Shas is the third-largest party in Jerusalem, drawing 12% of the votes. The neighborhoods that recorded the highest levels of support for this party were Ma'alot Dafna and Shmuel Hanavi (43%), Beit Yisrael Hayeshana (41%), and Beit Yisrael Hahadasha (40%). The Jewish Home received the highest levels of support in Kiryat Moshe and Giv'at Mordechai (23%-27%) as well as the Jewish Quarter, Rassco and Giv'at Oranim, and Old Katamon (19%-20%).

With respect to parties on the left side of the political spectrum, the Zionist Union received the highest levels of support in Nayot (45%) as well as Beit Hakerem, Motza Tahtit and Ramat Motza, Ramat Denya, French Hill, and Ein Kerem (28%-30%). Meretz received the highest levels of support in Ein Kerem and Nayot (21%) as well as the vicinity of Independence Park in the City Center, Talbiya, Yemin Moshe, Abu Tor, and the German Colony (16%-18%).

[47] The neighborhoods of Mea She'arim and Batei Ungarin, as well as Geula and Sha'arei Pina, which are also ultra-orthodox, recorded particularly low rates of voter turnout: 24% and 30%, respectively. Some of the residents of these neighborhoods belong to Ha'eda Haharedit (including Satmar Hasidism and Toldot Aharon Hasidism), which opposes Zionism and whose followers therefore do not participate in elections to the Knesset.

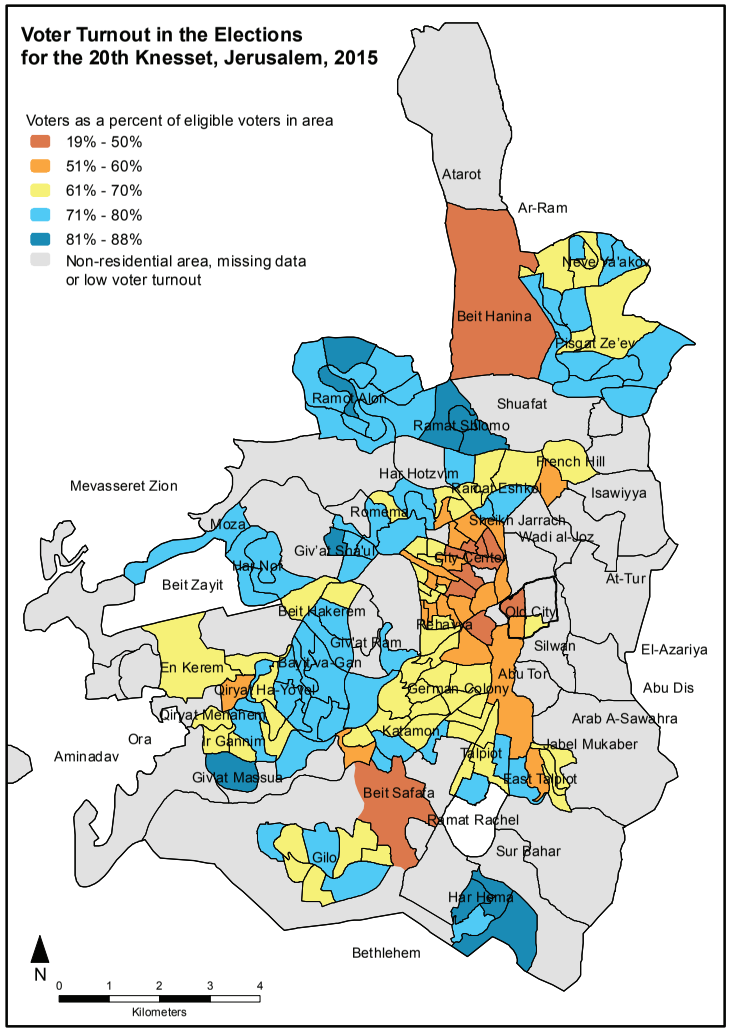
As the table and maps indicate, in neighborhoods where a majority of the population is ultra-orthodox, two parties dominate: United Torah Judaism, which received over 50% of the votes, followed by Shas, with over a quarter of the votes. In neighborhoods with a majority general Jewish population (secular, traditional, and religiously observant), voters supported a range of parties from the right and the left sides of the political spectrum. This distribution reflects the variety of political outlooks[48] among residents of these neighborhoods. It should be noted, however, that the leading party in most neighborhoods was Likud. The neighborhoods of Tel Aviv and Haifa differ from those of Jerusalem, as the former are characterized by a more homogeneous political outlook among their residents.



[48] Political outlook is reflected in a vote for a particular party.

Results of Elections to the 20th Knesset in Select Jerusalem Neighborhoods

	% voter turnout	Valid votes	Name of party									
			Likud	United Torah Judaism	Shas	The Zionist Union	The Jewish Home	Yachad	Kulanu	Yesh Atid	Meretz	Other parties
			Percent									
Total for Jerusalem	67	258,879	24	21	12	10	8	7	5	4	4	4
Neve Ya'akov	70	9,233	16	41	24	1	3	6	2	1	0	5
Pisgat Ze'ev	73	21,320	43	1	10	7	10	5	7	6	1	9
Ramat Shlomo	84	7,220	2	60	26	0	2	10	0	0	0	0
Ramot Alon	79	21,105	14	38	21	4	8	8	2	2	1	1
Geula, Mea She'arim	25	1,446	10	57	14	1	3	12	1	1	0	1
City Center	48	2,939	25	9	6	17	10	6	5	5	12	6
Nahlaot	61	4,944	25	11	8	13	12	9	5	3	9	4
Rehavya	61	4,625	24	7	1	23	13	4	5	5	15	3
Giva'at Shaul	78	5,130	7	40	18	1	13	20	1	0	0	0
Har Nof	76	8,284	6	56	17	0	8	11	0	0	0	1
Beit Hakerem	72	9,405	25	1	1	30	7	2	7	11	14	3
Kiryat Moshe	73	4,008	18	14	10	3	23	26	2	1	1	1
Bayit Vagan	74	7,439	10	47	19	3	6	10	1	1	1	1
Ramat Sharett, Ramat Denya, Holyland	74	5,454	28	6	5	23	6	5	6	11	7	3
Kiryat Hayovel	66	10,181	30	8	8	14	7	9	7	6	6	6
Gonen Aleph – Vav	70	6,720	42	1	7	9	13	6	9	5	4	4
Gonen Het – Tet	61	3,011	46	2	14	6	7	6	8	2	2	5
Old Katamon	66	5,237	30	4	2	18	19	4	6	5	9	3
Giva't Mordechai	75	2,436	23	10	10	7	27	13	3	3	2	2
East Talpiot	64	7,304	39	1	5	14	8	3	10	8	4	7
Har Homa	81	8,258	46	1	8	4	15	11	7	4	0	2
Gilo	69	15,901	40	5	10	10	7	5	8	7	2	6


Voter Turnout in the Elections
for the 20th Knesset, Jerusalem, 2015
Voters as a percent of eligible voters in area
19% - 50%
51% - 60%
61% - 70%
71% - 80%
81% - 88%
Non-residential area, missing data
or low voter turnout
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Mevasseret Zion
Har Hotzvim
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrach
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Har Nof
At-Tur
Beit Zayit
Old City
Beit Hakerem
Rehavia
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit Va-Gan
Abu Tor
Qiryat Ha-Yovel
German Colony
Abu Dis
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Talpiot
Jabel Mukaber
Aminadav
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
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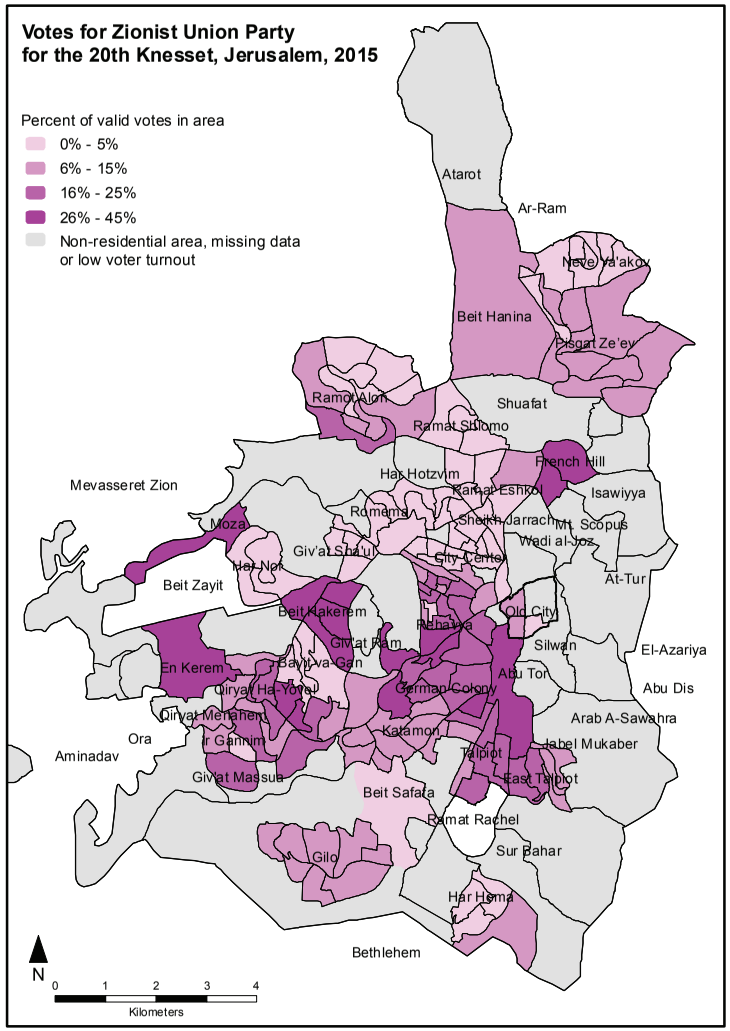
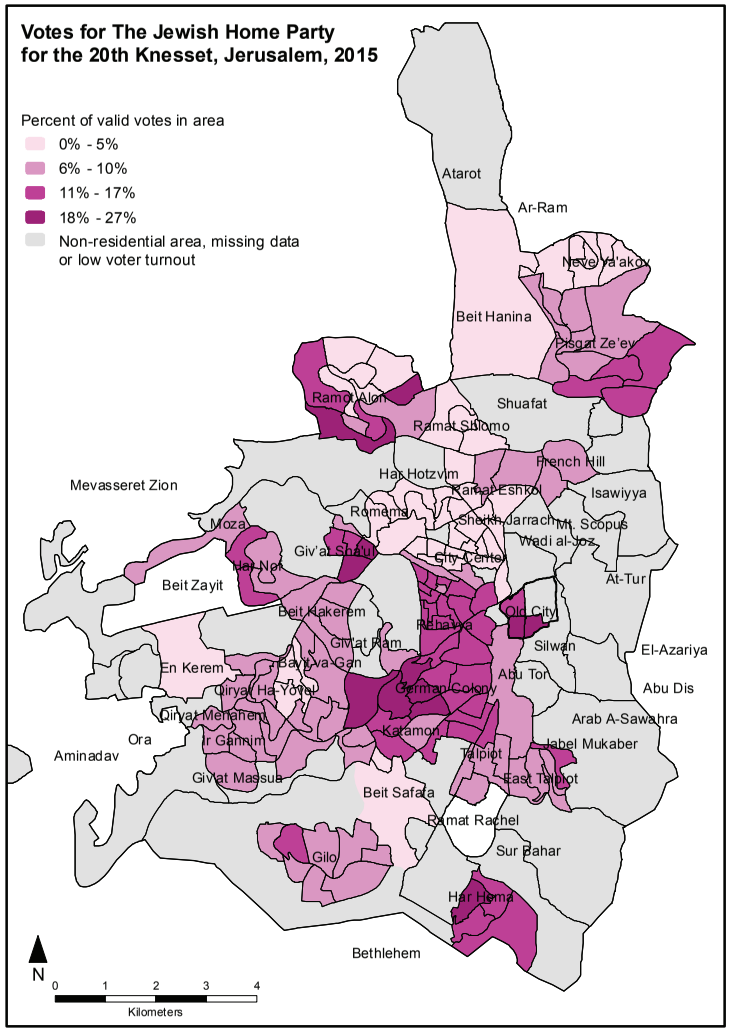
Kilometers


Votes for Zionist Union Party
for the 20th Knesset, Jerusalem, 2015
Percent of valid votes in area
0% - 5%
6% - 15%
16% - 25%
26% - 45%
Non-residential area, missing data
or low voter turnout
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Mevasseret Zion
Har Hotzvim
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrach
Mt. Scopus
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Har Nof
At-Tur
Beit Zayit
Old City
Beit Hakerem
Rehavia
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit Va-Gan
Abu Tor
Qiryat Ha-Yovel
German Colony
Abu Dis
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Talpiot
Jabel Mukaber
Aminadav
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers


Votes for The Jewish Home Party
for the 20th Knesset, Jerusalem, 2015
Percent of valid votes in area
0% - 5%
6% - 10%
11% - 17%
18% - 27%
Non-residential area, missing data
or low voter turnout
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrach
Mt. Scopus
Moza
Wadi al-Joz
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Bar Nor
At-Tur
Beit Zayit
Old City
Beit Hakerem
Rehavya
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit Va-Gan
Abu Tor
German Colony
Abu Dis
Qiryat Ha-Yovel
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Talpiot
Jabel Mukaber
Aminadav
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
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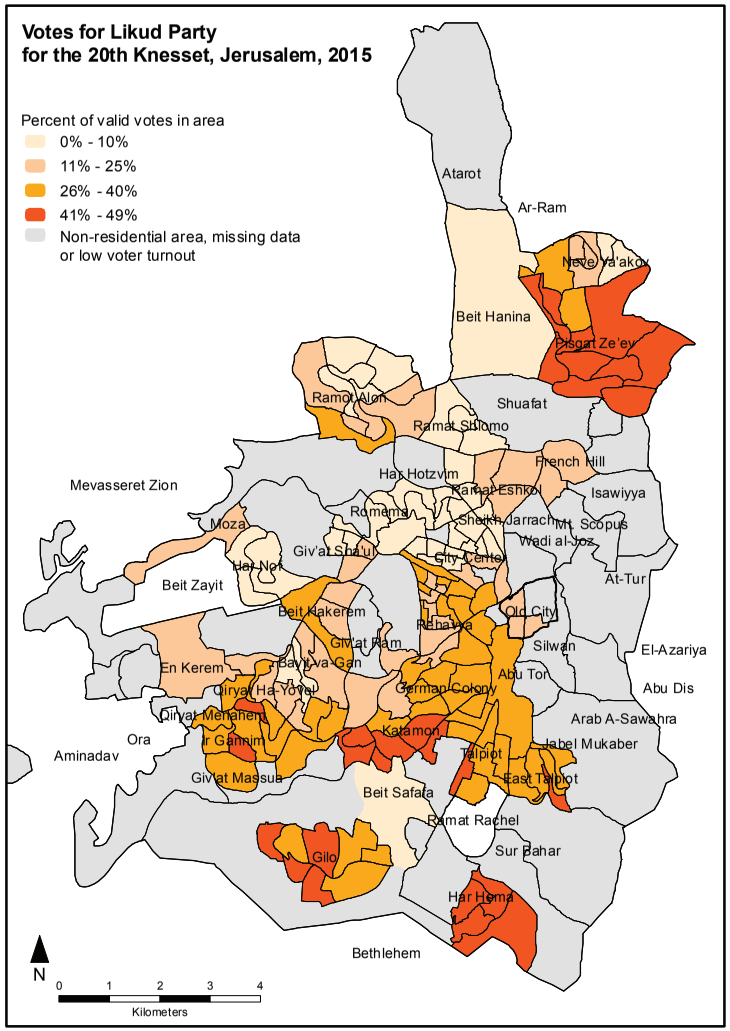
Kilometers


Votes for Likud Party
for the 20th Knesset, Jerusalem, 2015
Percent of valid votes in area
0% - 10%
11% - 25%
26% - 40%
41% - 49%
Non-residential area, missing data
or low voter turnout
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrach
Mt. Scopus
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Bar Nor
At-Tur
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Old City
Beit Hakerem
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Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit Va-Gan
Abu Tor
German Colony
Abu Dis
Qiryat Ha-Yovel
Qiryat Menahem
Arab A-Sawahra
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East Talpiot
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
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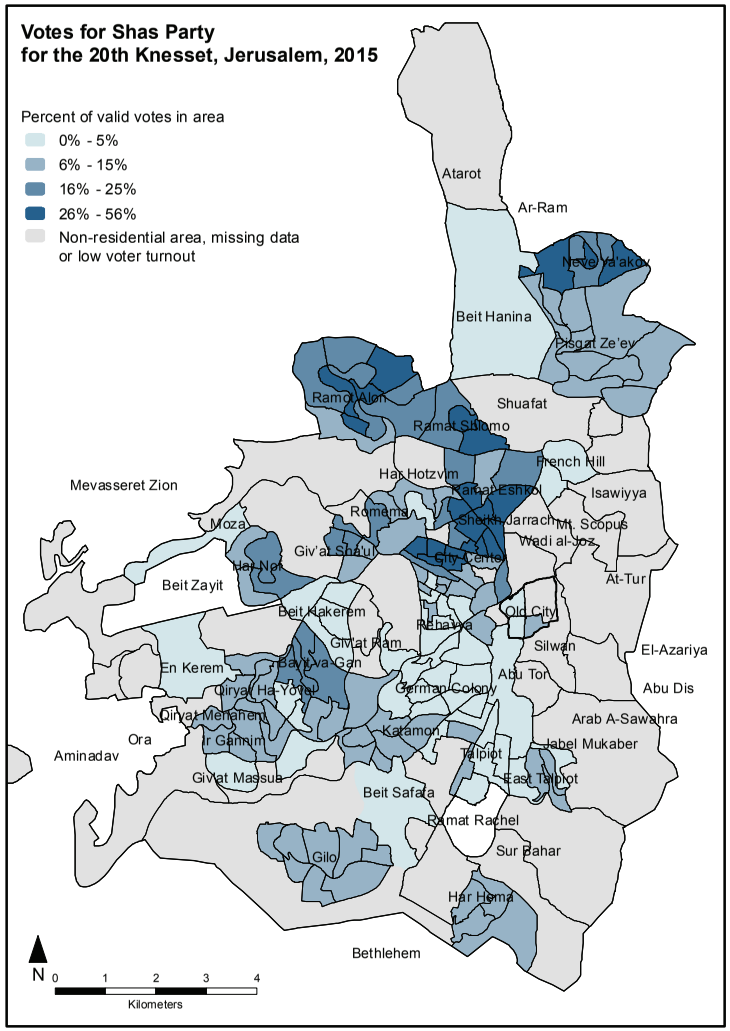
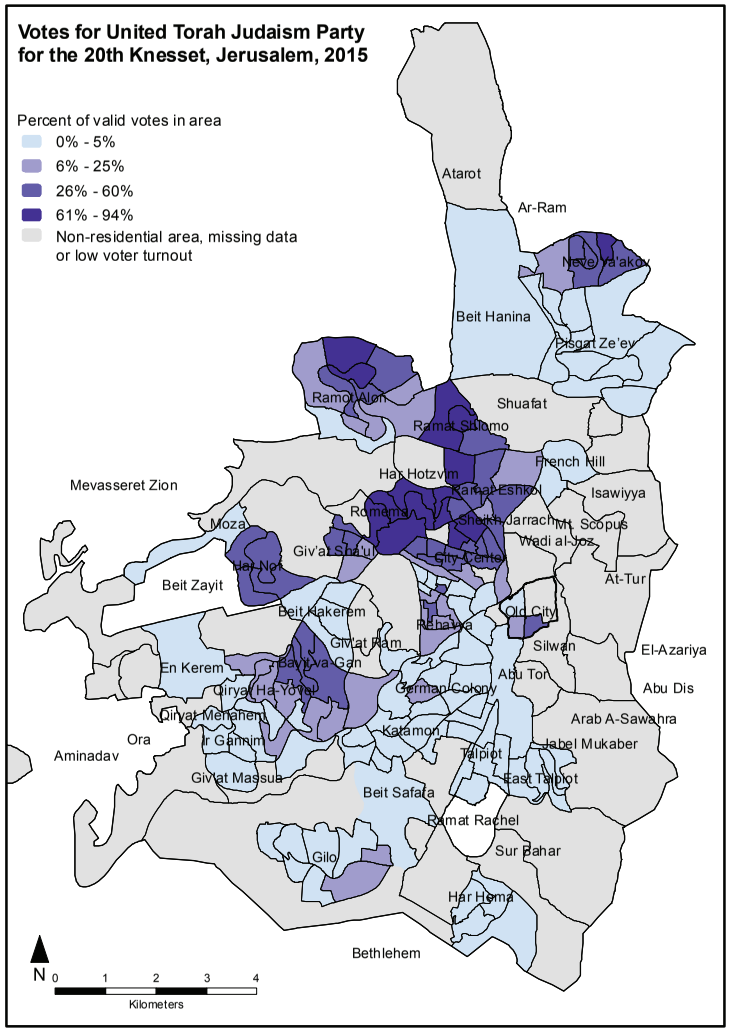

Votes for Shas Party
for the 20th Knesset, Jerusalem, 2015
Percent of valid votes in area
0% - 5%
6% - 15%
16% - 25%
26% - 56%
Non-residential area, missing data
or low voter turnout
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrach
Mt. Scopus
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Bar Nor
At-Tur
Beit Zayit
Old City
Beit Hakerem
Rehavia
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit Va-Gan
Abu Tor
German Colony
Abu Dis
Qiryat Ha-Yovel
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Talpiot
Jabel Mukaber
Aminadav
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers


Votes for United Torah Judaism Party
for the 20th Knesset, Jerusalem, 2015
Percent of valid votes in area
0% - 5%
6% - 25%
26% - 60%
61% - 94%
Non-residential area, missing data
or low voter turnout
Atarot
Ar-Ram
Neve Ya'akov
Beit Hanina
Pisgat Ze'ev
Ramot Alon
Shuafat
Ramat Shlomo
French Hill
Har Hotzvim
Mevasseret Zion
Ramat Eshkol
Isawiyya
Romema
Sheikh Jarrach
Mt. Scopus
Moza
Wadi al-Joz
Giv'at Sha'ul
City Center
Bar Nor
At-Tur
Beit Zayit
Old City
Beit Hakerem
Rehavia
Giv'at Ram
Silwan
El-Azariya
En Kerem
Bayit Va-Gan
Abu Tor
German Colony
Abu Dis
Qiryat Ha-Yovel
Qiryat Menahem
Arab A-Sawahra
Katamon
Ora
Ir Ganim
Talpiot
Jabel Mukaber
Aminadav
Giv'at Massua
East Talpiot
Beit Safafa
Ramat Rachel
Gilo
Sur Bahar
Har Homa
Bethlehem
N
0 1 2 3 4
Kilometers

Regarding the environs of Jerusalem, the ultra-orthodox cities and localities – Betar Illit, Modi'in Illit, and Kiryat Ye'arim – recorded high levels of support for United Torah Judaism (59%-76%) and Shas (13%-24%). Beit Shemesh, where approximately half the population is ultra-orthodox, also recorded high levels of support for these parties (28% and 14%, respectively).

In localities within the environs of Jerusalem that have a majority general Jewish population (secular, traditional, and religiously observant), there is strong support for parties on the right side of the political spectrum.

The highest levels of support for Likud were recorded in Ma'ale Adumim (48%), Giv'at Ze'ev, Mevasseret Zion, and Efrat (31%-34%), and Beit Shemesh, Tzur Hadassa, and Kiryat Arba (25%-27%). The Jewish Home drew very high levels of support in Beit El (59%), Efrat (55%), and Kiryat Arba (34%). Kiryat Arba and Beit El also recorded high levels of support for Yachad (Eli Yishai's party), at 27%-30%.

Har Adar, Mevasseret Zion, and Tzur Hadassa recorded relatively high levels of support for the Zionist Union (27%-39%). These three localities also recorded the highest levels of support for Yesh Atid (11%-18%) and Meretz (8%-9%).

- The Environs of Jerusalem -

The environs of Jerusalem include cities, local authorities and regional councils (incorporating communal localities, kibbutzim, and moshavim) that have wide-ranging reciprocal relations with Jerusalem, the major city within this area. These reciprocal relations cover an extensive and varied array of subjects, including employment, education, commerce, culture, and leisure and recreation, among others. In general, the closer the localities are to the major city, the stronger the connection. Residents of localities within the innermost ring surrounding Jerusalem, therefore, have a stronger and more varied connection to the city than residents of localities in the outermost ring, who have a weaker connection to it. For example, Ma'ale Adumim, Mevasseret Zion, and Betar Illit have stronger connections to Jerusalem than do Modi'in, Beit Shemesh, and Kiryat Arba.

The cities and local councils within the environs of Jerusalem are (in alphabetical order): Abu Ghosh, Beit El, Beit Shemesh, Betar Illit, Efrat, Giv'at Ze'ev, Har Adar, Kiryat Arba, Kiryat Ye'arim (Telz Stone), Ma'ale Adumim, Mevasseret Zion, Modi'in Illit, and Modi'in-Maccabim-Reut.

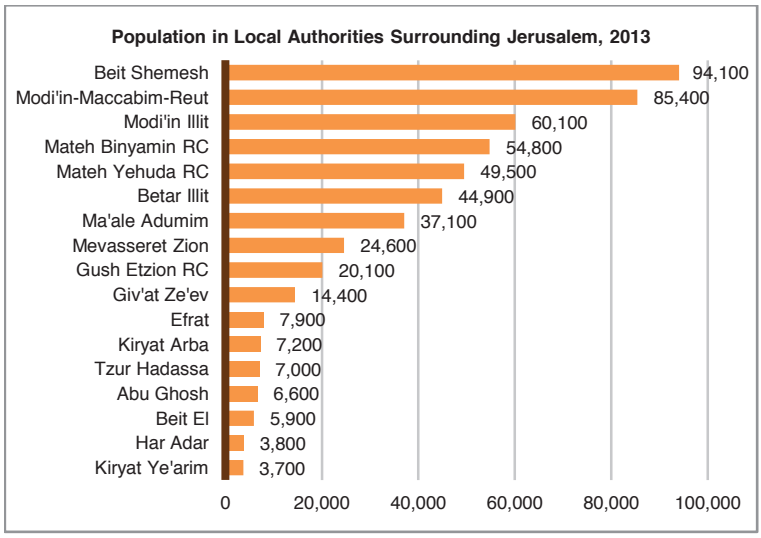
In addition, the environs include three regional councils: Gush Etzion, Mateh Binyamin, and Mateh Yehuda. The regional council of Mateh Yehuda includes 61 localities (most of which take the form of a moshav, a rural locality). Mateh Binyamin contains 26 localities (most of which are communal localities), and Gush Etzion has 14 localities (mostly communal localities).

Population size

Jerusalem, as noted, is the major city in the area, and its population is the largest and most heterogeneous. Most localities in the Jerusalem environs, in contrast, are characterized by relatively homogeneous populations. Through migration the population distributes itself within the area in accordance with its characteristics or profile, thereby segregating neighborhoods, localities, and regions. The lines of segregation within this area reflect the polarization within society. In general, the greater the differences among population groups, the more marked their segregation.

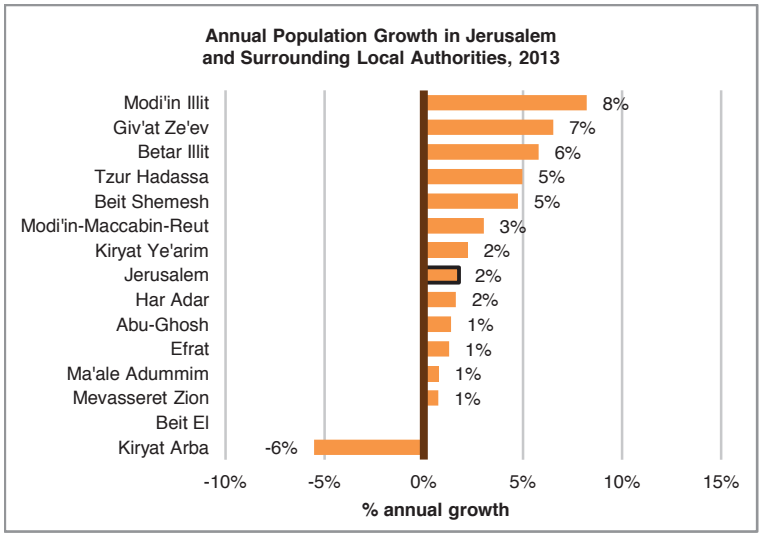
The localities within the environs of Jerusalem differ from each other in terms of population size, religious identification, and socio-economic characteristics of their residents.

In 2013 the largest localities in the area, excluding Jerusalem (829,900 residents), were Beit Shemesh (94,100 residents), Modi'in-Maccabim-Reut (85,400 residents), and Modi'in Illit (60,000 residents). The smallest municipal localities (municipalities and local councils) were Beit El (5,900 residents), Har Adar (3,800 residents), and Kiryat Ye'arim (3,700 residents).



Population growth

Three factors contribute to the population growth of a locality: natural growth (the difference between the number of births and the number of deaths), aliya (Jewish immigration), and internal migration.



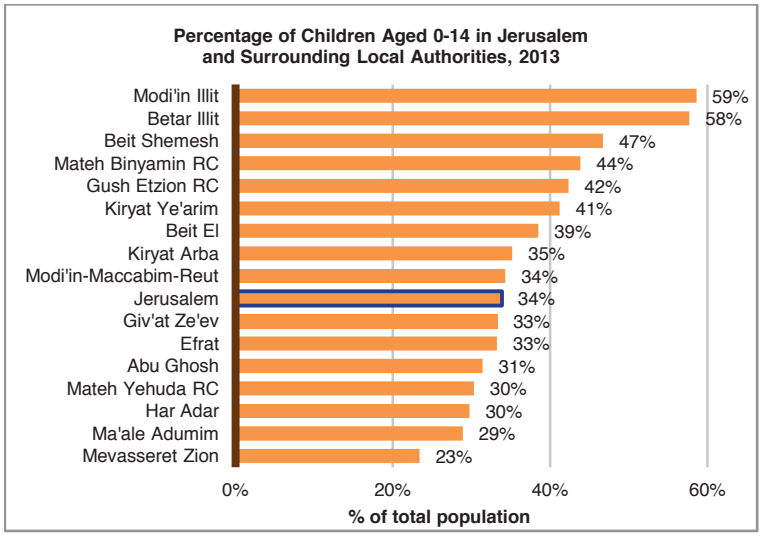
In 2013 the highest annual population growth rate was recorded in Modi'in Illit (8%), the Gush Etzion Regional Council (7%), Giv'at Ze'ev (7%), Betar Illit (6%), and Beit Shemesh (5%). In the Gush Eztion Regional Council and Giv'at Ze'ev, the population growth resulted from both natural growth and a positive migration balance, while in Modi'in Illit, Betar Illit, and Beit Shemesh (which are ultra-orthodox localities or localities with large ultra-orthodox populations), the population growth resulted primarily from natural growth.

A low or negative population growth rate was recorded in Kiryat Arba (-6%), Beit El (0%), Ma'ale Adumim (1%), and Mevasseret Zion (1%). Jerusalem had a population growth rate of 2%.

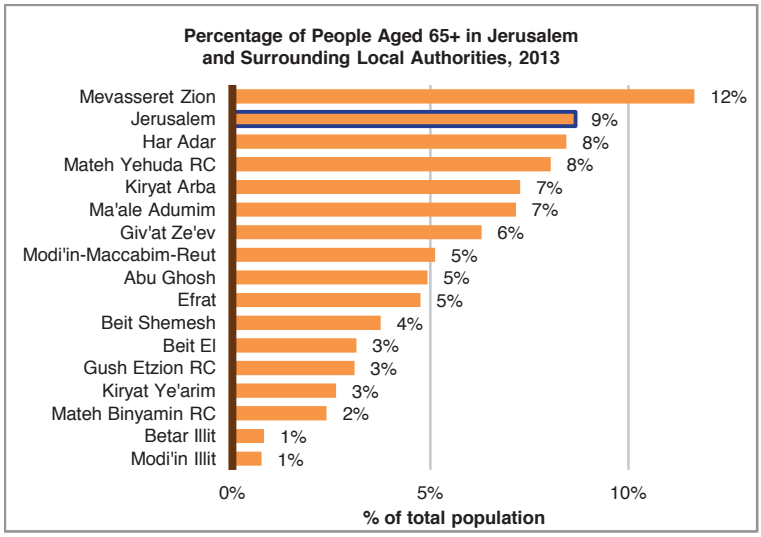
Population age

The localities in the environs of Jerusalem are also differentiated by the age distribution of their residents. Localities with a majority ultra-orthodox population are characterized by a very high percentage of children. In 2013, the proportion of children aged 0-14 in the cities of Betar Illit and Modi'in Illit, whose populations are primarily ultra-orthodox, was 58%-59%. In Beit Shemesh (approximately half of whose population is ultra-orthodox) and Kiryat Ye'arim (an ultra-orthodox locality) there were also relatively high percentages for this age group, at 47% and 41%, respectively.

The percentages of children aged 0-14 in the regional councils of Mateh Binyamin and Gush Etzion, which have primarily religiously observant populations, were 44% and 42%, respectively. Relatively low percentages of children were recorded in Mevasseret Zion (23%), Ma'ale Adumim (29%), and Har Adar (30%). In Jerusalem the percentage was 34%.



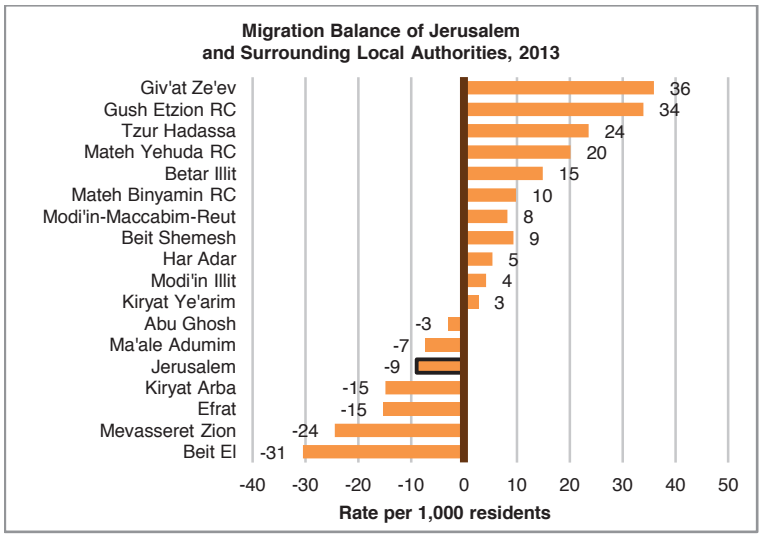
With respect to the population group aged 65 and above, the localities with a majority ultra-orthodox population are characterized by a very low percentage of this age group. In 2013 the percentage of people aged 65 and above in Betar Illit and Modi'in was 1%. The regional councils of Gush Etzion and Mateh Binyamin also recorded low percentages, at 2%-3%. The highest percentage of people aged 65 and above was recorded in Mevasseret Zion (12%) and the regional council of Mateh Yehuda (8%). In Jerusalem this population group constituted 9% of the population.



Internal migration

The internal migration balance among localities in the Jerusalem environs indicates that six localities had a negative migration balance in 2013: Mevasseret Zion (-600 persons), Ma'ale Adumim (-270 persons), Beit El (-180 persons), Efrat (-120 persons), Kiryat Arba (-110 persons), and Abu Ghosh (-20 persons). The localities in which the negative migration balance was greatest (migration balance in relation to population size in that locality) were Beit El (-31 per 1,000 residents), Mevasseret Zion (-24 per 1,000 residents), and Efrat and Kiryat Arba (-15 per 1,000 residents). In Jerusalem the balance was -9 per 1,000 residents.

The localities characterized by the greatest positive migration balance were Beit Shemesh (860 persons), Modi'in-Maccabim-Reut (690 persons), Betar Illit (650 persons), and Giv'at Ze'ev (500 persons). The highest proportions of positive migration balance were recorded in Giv'at Ze'ev (36 per 1,000 residents), Tzur Hadassa (24 per 1,000 residents), Betar Illit (15 per 1,000 residents), and Beit Shemesh (9 per 1,000 residents). The migration balance for a locality is a function of various factors, including the locality's attractiveness and the extent of new construction.


Migration Balance of Jerusalem
and Surrounding Local Authorities, 2013
Giv'at Ze'ev
Gush Etzion RC
Tzur Hadassa
Mateh Yehuda RC
Betar Illit
Mateh Binyamin RC
Modi'in-Maccabim-Reut
Beit Shemesh
Har Adar
Modi'in Illit
Kiryat Ye'arim
Abu Ghosh
Ma'ale Adumim
Jerusalem
Kiryat Arba
Efrat
Mevasseret Zion
Beit El
36
34
24
20
15
10
8
9
5
4
3
-3
-7
-9
-15
-15
-24
-31
-40
-30
-20
-10
0
10
20
30
40
50
Rate per 1,000 residents