

The Nishma Research Pesach Survey: Summary Report

April 2024



Introduction & Methodology – See page 3 of the full report

Preparing for Pesach

- Pesach preparation engenders many – often conflicting – emotions, and the one most cited (70%) is anticipation. About half say they feel tired and worried about getting everything done, but an equal number say they feel happy and religiously inspired. Only one-third feel financially worried, and even fewer feel energetic. (See page 7 of the full report)
- Strongest agreement (more than two-thirds) is around Pesach preparation being extremely time-consuming. In terms of getting it done, 43% feel that “women do all or pretty much all of the preparation work” and 40% say that “preparation is extremely difficult.” Fewer (about one in four) get anxious or upset about food or clothing shopping. (See page 8 of the full report)

The Seder – Location and Logistics

- The vast majority (86%) will observe a seder in their or a relative’s home ... 54% in their home and 32% at parents’, children’s or another relative’s home. Haredi more often will be at a parent’s home. 6% of Modern Orthodox and 2% of Haredi will be at a hotel or a tour/program. Among all respondents, 19% leave home for all of Pesach, and basically lock up. The % is identical for MO and Haredi. (See page 11 of the full report)
- The typical seder has nine attendees ... six adults and three children under age 16. Haredi *sedarim* are slightly larger, with more young children. But there is a very wide range in seder size. In fact, 10% of *sedarim* have 20 or more attendees, about half adults and half children (this includes those at local organizations as well as hotels or tours). (See page 12 of the full report)
- Among those making a seder at home, 17% say they “have a Pesach kitchen”; 7% buy catered meals or services; and 4% have hired help. (See page 13 of the full report)

- Among 31 Modern Orthodox respondents who expect to be at a hotel or tour location, 23 (74%) say they are bearing the costs and 8 (26%) say the cost is being paid by someone else. Among the former, costs vary widely, with a median (midpoint) of \$10,000, and an average of \$23,000. Based on the survey results and population data, we estimate the “U.S. Orthodox Pesach vacation market” could be in the range of \$140 million. This is admittedly a very rough estimate based on a small sample, but the purpose of this exercise is to give a sense of scale. (See page 14 of the full report)

Meaningfulness of the Seder

- Half of Orthodox Jews see Pesach as the family religious highlight of the year – not surprising given the seder and the family “get-togethers” – and 40% see it as their personal religious highlight of the year. In both cases, Haredim see Pesach as a religious highlight more often than Modern Orthodox. Strong majorities find the *sedarim* to be fun for children and meaningful, with about half also finding them inspiring and fun for adults. Few find them boring. (See pages 16-17 of the full report)
- About three-fourths say they “Pretty much follow the order and contents of the *Haggadah*.” Modern Orthodox “innovate” a bit more than Haredi. There is widespread unhappiness with the late starting time. (See page 18 of the full report)

Pesach Food – Matzas, Laws & Customs, Health

- About half of Modern Orthodox buy mostly machine matzas and some hand-made shmurah (a median of 3 pounds); while half of Haredi buy only hand-made shmurah (a median of 8 pounds, with one-fourth buying 16 or more pounds). Based on these responses and demographic data, the estimated total U.S. market for hand-made shmurah matzas is 2.3 million pounds, at a cost of \$80 million. (See page 20 of the full report)

- There are variations in the price of hand-made shmurah matza: one in four families pays \$25 or less, and one in four pays \$40 or more. We estimate that one in four Haredi families pays \$700+ for their total hand-made shmurah matza purchases. Finally, respondents estimate that 18% (median) of the shmurah matzas they purchase are broken. So, the expectation is that 5 or 6 of the average 7 matzas in a one-pound box will be whole. (See page 20 of the full report)
- 62% of Haredi and 30% of MO are very careful with the matza *shiur* at the seder; similar differences are found with *kitniyos* (96% of Haredi and 78% of MO are very strict, although the MO figure rises to 84% if we exclude those for whom it is not a family custom); and for *gebrokts* (45% of Haredi and 5% of MO are very strict). (see page 21 of the full report) About one-third have “food problems” (they see Pesach meals as at least somewhat unhealthy, gain weight, etc.) but a majority do not agree. Among those who gain weight, 20% of Modern Orthodox and 31% of Haredi say they generally do not lose all the weight gained. (See page 22 of the full report)

The Overall Pesach Experience

- While nearly half of all respondents say that Pesach makes them feel tired and stressed, these feelings are far outweighed by the overwhelming number (80%) who feel connected to their family, ancestors, Jewish history, and community, as well as the feelings of appreciation for what they have. Pesach truly is a communal holiday, as much as a religious observance. (See page 24 of the full report)

Differences Between Modern Orthodox and Haredi – These are highlighted for every data display.

Differences Between Men and Women, by Age, and by Income – See page 27 of the full report

Verbatim Responses – This report contains random samples of the verbatim responses received to several questions. All verbatim responses are available at <http://nishmaresearch.com/social-research.html>.