



The Israel
Educational
Travel Alliance

Summer 2026 Pulse Survey

Findings and Big Questions for the Field

The field held its ground through a second wartime summer. The hit landed harder on programs reaching the least engaged.

October 2026

Methodology

- Fielded September 16 – October 6, 2026; 32 organizations completed the survey
- Respondents include the three platform organizations (Birthright Israel, Masa, and RootOne) and many of the field's largest program operators
- Organizations reported original and updated 2026 projections, participants served so far, cancellations, cost per participant, and where they want support
- Compared with IETA's summer 2025 pulse survey (August 2025, 35 organizations) and annual field survey (December 2025, 39 organizations)

COUNTING EACH PARTICIPANT ONCE

The field-wide estimate uses the overall figures of the three platforms (Birthright Israel, Masa, RootOne) and leaves out 12 teen and campus programs they already count, plus half of an organization that brings multigenerational participants. Every other comparison includes all 32 respondents.

Key Figures – 2026 Post-Summer Snapshot

52,000

Total Expected Participants

37,000

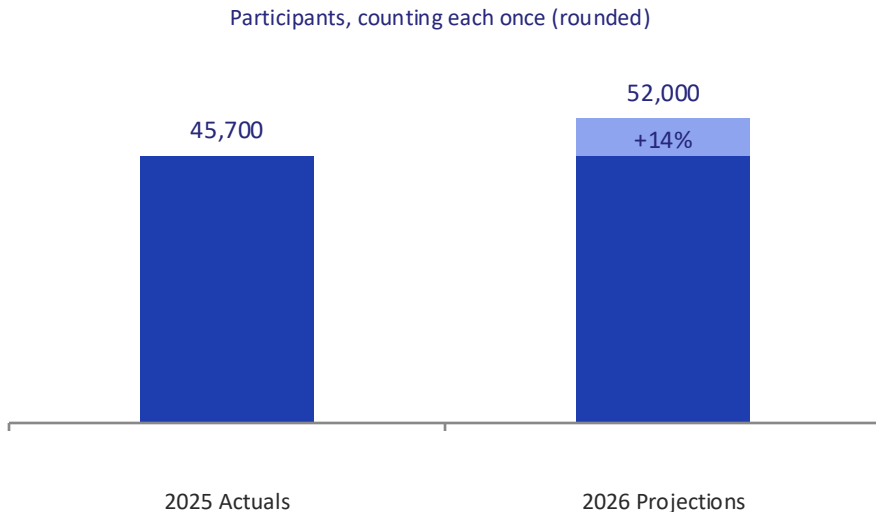
Already Traveled

$\sim \frac{1}{3}$

Of the projected participants
this year still ahead

Source: IETA summer 2026 pulse survey, 32 organizations, September 16 – October 6, 2026. Field-wide figures are rounded estimates.

The field projects a 14% growth in participation from 2025 despite continued disruption



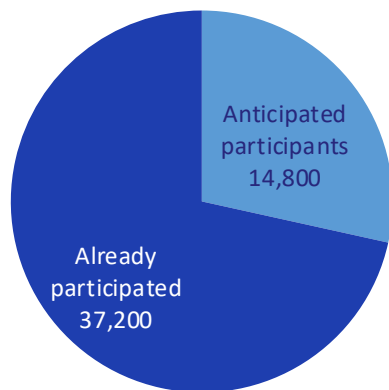
IMPLICATIONS FOR THE FIELD

- Total projected participants for 2026 is 14% more than 2025 actual participants
- Field-wide, about 52,000 participants are expected: about 20% below original 2026 projections collected pre-Iran war in December 2025
- 22% organizations held steady or plan to grow their participant reach in 2026
- While some audience segments were impacted more, all segments of the field experienced some decrease from original projections

Sources: IETA summer 2025 and 2026 pulse surveys.

52,000 total participants are expected in 2026

Total 2026 projected participants

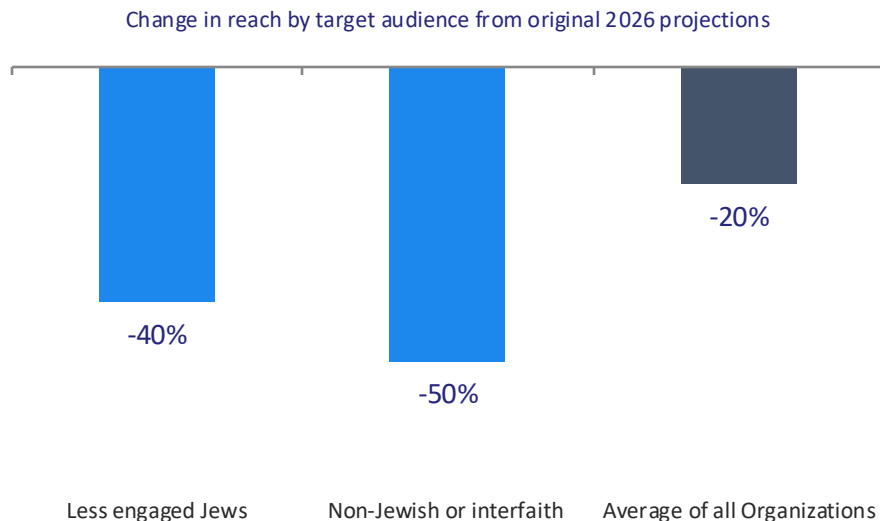


IMPLICATIONS FOR THE FIELD

- About 2/3 of all projected participants already traveled as of early October 2026.
- More programs, especially for adults, were delayed to the fall because of the early disruption of the season with the onset of the recent Iran war in February 2026.
- Totals deduplicate participants traveling through sub-programs of platform organizations (Taglit-Birthright Israel or Volunteer Trips, Masa or RootOne subsidized programs.)

Sources: IETA summer 2026 pulse survey.

Programs for the less engaged and non-Jews remain hit harder



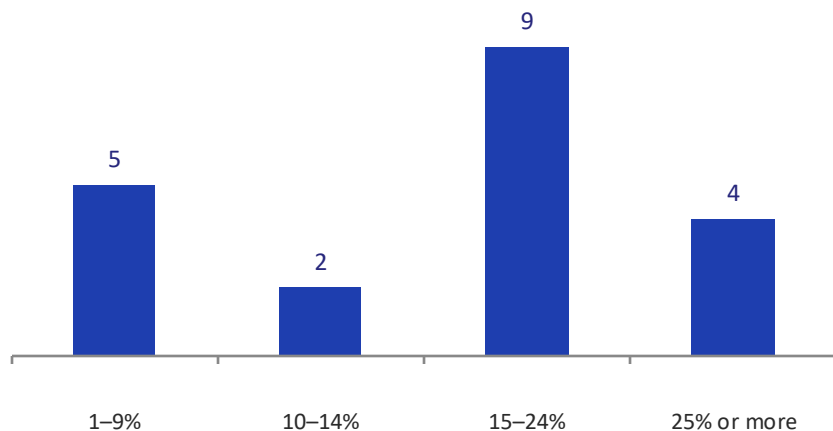
IMPLICATIONS FOR THE FIELD

- Two out of five of all less engaged Jews and half non-Jews originally projected to participate in 2026 trips chose not to come. In comparison, about a third of all other trip participants did not end up coming on trips.
- Reaching unengaged Jews is a challenge felt by all providers, though impact is strongest among these less engaged participants (Brandeis, 2026).
- Non-Jewish and interfaith programs are waiting on conditions, not demand: about three-quarters of their participants were rescheduled for the fall, following the spring onset of the war with Iran.

Sources: IETA summer 2026 pulse survey; Brandeis Cohen Center, *A Summer of Uncertainty* (March 2026). Small groups; read as directional.

Average per-participant costs rose 15% since the start of 2026

Increased in per-participant cost from original 2026 budget



DRIVERS

- Airfares: consistent concern is the rising cost of airfare, with price increases up to double pre-war costs
- Insurance gap: insurance costs have steeply increased and standard war exclusions in insurance policies are deterring smaller providers out of fear of liabilities
- Exchange rate: the shekel is stronger than a year ago, and the volatility in the currency market impacts providers capacity to plan ahead

Source: IETA summer 2026 pulse survey. 13 of 20 organizations reported increases of 15% or more. 20 of 32 organizations provided this information.

Exchange rate: Bank of Israel, Sept. 2026 vs. Sept. 2025.

Cost volatility creates the largest challenge for the field

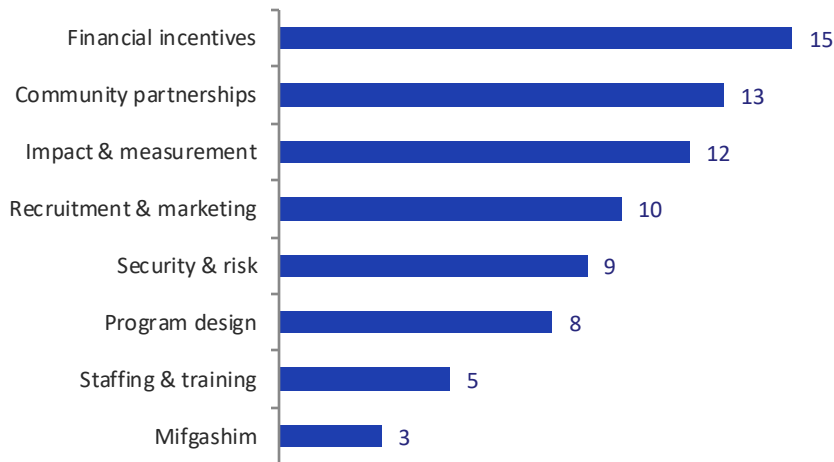
THE IMPACT

- Groups get smaller
- Cancellations come earlier
- The less engaged cost more to reach, and fewer of them come
- Fewer participants and requests for more funding support

*Source: IETA summer 2026 pulse survey. 13 of 24 organizations reported increases of 15% or more. 20 of 32 organizations provided this information.
Exchange rate: Bank of Israel, Sept. 2026 vs. Sept. 2025.*

The field is refocusing from crisis response to lowering barriers to participation

Areas selected, of 32 organizations (up to three each)



IMPLICATIONS FOR THE FIELD

- Last summer, marketing and recruitment were the key concerns
- The focus on financial incentives and community partnerships showcases a field that is looking for more ways to bring more participants
- Community partnerships: federations, schools, synagogues, and campuses are clearly part of the recruitment pipeline

Sources: IETA summer 2025 and 2026 pulse surveys. Answer options changed between years.

This Year Compared With Last Year

Measure	Summer 2025 pulse survey	Summer 2026 pulse survey
When fielded	August 2025, after the 12-Day War	Sept–Oct 2026, after the war with Iran
Organizations responding	35	32
Field-wide projection	About 44,500 for 2025, ~24% below expectations	About 52,000 for 2026, ~20% below original projections
Costs	At least \$26.6M in unplanned costs	Median +15% cost per participant
Top support need	Marketing and recruitment	Financial incentives for participants

The two surveys asked different questions and built field-wide figures differently; read rows as the same pattern measured differently. Sources: IETA summer 2025 and 2026 pulse surveys.

Keep Us Posted as the Fall Unfolds

A short note to IETA when a program moves, fills, or falls through keeps this picture current and helps us make the field's case to partners while it still matters. Organizations that did not respond are still welcome to share their numbers.

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