



**The Israel
Educational
Travel Alliance**

Pulse Survey Findings Snapshot:

Impact of the 12-Day War Israel Educational Travel



**Jewish
Federations**
of North America



Methodology

- **Fielded August 2025**
- **35 organizations completed the survey, including 100% of Steering Committee organizations**
- **Designed and implemented with JFNA's Impact & Research and Analysis teams**
- **To the best of our ability, data was deduplicated and queried to ensure the best possible comparison to initial 2025 projections gathered in IETA's annual survey.**
- **The 'Summer Travel' season as defined in this survey is May 1 – Sep 30**

Full Year 2025 Travel Projections and Impacts



Finding:

A total of ~44,500 participants are projected to participate in Israel educational travel programs in 2025, a 24% decrease from the ~58,000 expected before the 12-Day War. Importantly, this is still a considerable 20% increase in participation from the year prior, following the atrocities of 10/7.

This may not capture the full picture of those participants who want to go. Rescheduled program dates, lingering security concerns, and flight availability impacted pax access to rebooking trips.

Implications for the Field:

- A cautious and steady recovery is underway.
- The demand is not gone, but fluctuating; would-be travelers were blocked by timing and safety perceptions, not necessarily lack of interest.
- Messaging should emphasize both resilience and rebound: “the field is still coming back strong, but progress has slowed given current context.”
- Messaging should answer the question, “why go to Israel now?”

Summer 2025 Travel Projections and Impacts



Finding:

~22,500 participants projected through the end of the summer season, in comparison to the ~35,000 expected before the 12-Day War, [which represents a 35% decrease](#).

- 95% of total summer participants were Teens & Young Adults.
- 25% of the reporting organizations were unable to implement their trips, a clear indicator of how drastically the 12-Day War impacted the field.
- Another 20% were able to bring only half of their originally projected participants, with some of these programs bringing all their participants before the 12-Day War.

Implications for the Field:

- Fewer summer travelers means downstream impact: fewer alumni advocates and reduced word-of-mouth recruitment for future cohorts.
- Israel programs will need emergency protocols as a standard aspect of trip planning.



Estimated Financial Impact of the 12-Day War

Finding:

The 35 reporting organizations experienced costs of at least \$26.6M.

- Costs totaled more than \$2 million per day of the 12-day war for our sector alone.
- Costs included evacuations, non-refundable deposits, cancellations, and revenue loss.
- Some organizations have made, or are considering, staff reductions to recoup costs.
- These totals do not include staff hours and other internal expenses or revenue spent to ensure recovery (i.e., remarketing trips, fundraising to cover losses, etc.).
- These numbers are not holistic for the field of Israel educational travel providers, many of whom cancelled entirely and incurred associated costs; reporting on planned trips that did not occur was more limited than our field outreach would indicate.
- Most organizations are also struggling to quantify their losses, given the number of areas of impact.
- This data does not include the wider Israeli tourism industry losses.



Estimated Financial Impact of the 12-Day War

Implications for the Field:

- Financial resilience is a challenge for the field.
- Airfare costs continue to increase among Israeli air carriers. Terms and conditions are also increasingly less favorable for group booking.
- Ground costs are likely to continue to rise as the capacity of the Israeli tourism sector decreases due to lack of tourism, resulting in increased competition for fewer vendors (hotels, bus drivers, etc.).
- There is potential long-term erosion of professional capacity as staff sizes decrease.
- Organizations may need emergency reserves to weather future crises.



Key concern across the field: Marketing & Recruitment

Finding:

Organizations report their biggest challenge going into the 2025-26 trip season is how to talk about Israel travel opportunities in the current climate. Organizations fear losing momentum in recruitment and fundraising without updated messaging.

Implications for the Field:

- Previous marketing and recruitment approaches are falling short. Recruitment campaigns need to highlight safety, purpose, and transformative outcomes while addressing new push/pull factors (social cost risks, security, parental hesitations, etc.).
- Risk of widening the gap between well-resourced organizations who can pivot and those who cannot.



IETA's Strategic Response and Next Steps

- Sharing this data with you all, the IETA field, funding communities, and the media to contextualize what organizations are experiencing and call attention to needs.
- Curating versions of this data to be shared through diverse distribution channels.
- Producing and publicizing an essential emergency preparedness protocol checklist for to support all organizations adopting foundational emergency procedures.
- Hosting a Webinar on 'Learning from Emergencies' featuring IETA leaders.
- Convening IETA orgs at JFNA's GA and at IETA's Field Summit to share strategies and collaborate on broad-based solutions.
- Exploring possible shared market research and message testing supports to help organizations make data-informed updates to recruitment and marketing strategies.
- Continuing to advocate with airlines, insurance partners, and government of Israel partners to support our field and call attention to important infrastructure needs.