



War in the Middle East: UK ELT sector impact survey

Survey 1 findings
April 2026



Introduction

- This is the first of a series of planned monthly surveys gathering English UK members' perceptions of the impact of the war in the Middle East on their businesses.
- As a perceptions-based survey, results may skew towards the negative, particularly given the low response rate (those most concerned are more likely to respond).
- Findings should therefore be interpreted with appropriate context.
- The survey helps English UK and its members understand shared sentiment across the sector, rather than provide quantitative impact measures.
- The survey will be repeated monthly while uncertainty continues. During this time, the UK ELT sector is open for business as normal.



Survey responses

Total responses: 47 (~18% of member centres)

Ownership type:

- Private sector & independently owned: 80% (38 responses)
- Private sector & chain or group: 14% (7 responses)
- State sector: 4% (2 responses)

Provision type/ focus:

- Year-round centres adults and/ or juniors: 61% (29 responses)
- Seasonal centres juniors only: 34% (16 responses)
- Seasonal centres adults and juniors: 5% (2 responses)



General impact and level of concern

Impact to date:

- 62% respondents noted a significant or minor impact
- 36% said it was too early to tell as the situation was still developing
- 2% had seen no impact and didn't expect one

Future impact:

- 89% of respondents were very or somewhat concerned about the future impact of the war on their business

Financial impact:

- 92% of respondents rated the likely impact as moderate to severe, with only 8% anticipating little or no impact



Specific impact

- Respondents identified a number of areas where they have already seen an impact due to the war
- Most significant to date are course cancellations, a drop in future bookings and rising fuel and transport costs – 13% of respondents had seen an impact here already
- Also significant were drops in flight availability, current course enrolments and a broad decline in customer confidence



What should English UK ask of government and other stakeholders?

For this question, we asked members to rank five asks in order of priority. The priority order was:

1. Protect airline capacity and routes
2. Provide financial support such as business rates relief
3. Provide messaging that the UK is 'open for business'
4. FCDO to provide clear and timely travel advice
5. DBT to provide regular industry engagement updates



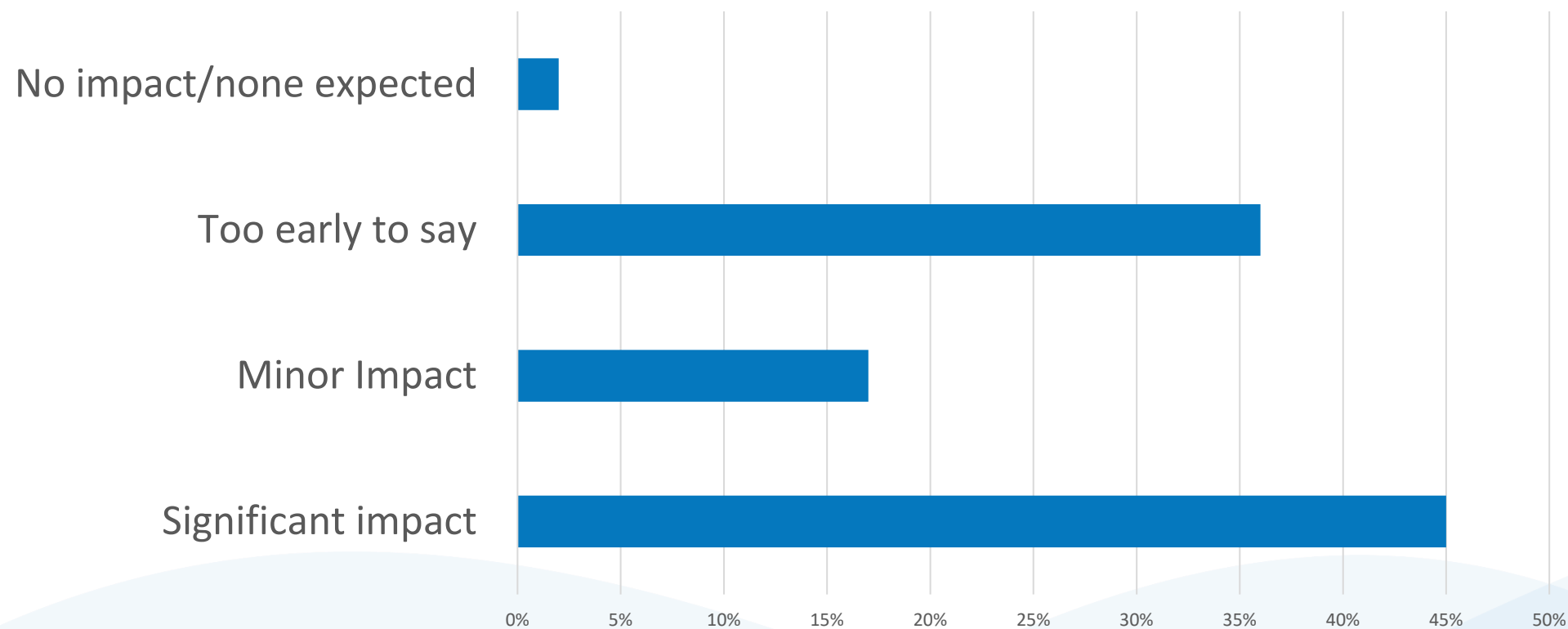
Further comments from members

13 of the members that responded believe the situation is largely beyond government control and market challenges were evident even before the conflict began.

- A number said that although it is too early to assess the longer-term impacts beyond summer 2026, they had already seen course cancellations, reduced future bookings or allocations and rising transport costs.
- There were concerns around flights including decreased capacity, longer routes and fuel surcharges.
- Members would like to see clear messaging from the government showing that the UK is safe and open, relaxation of visa policies, and discounts on business rates for language schools.

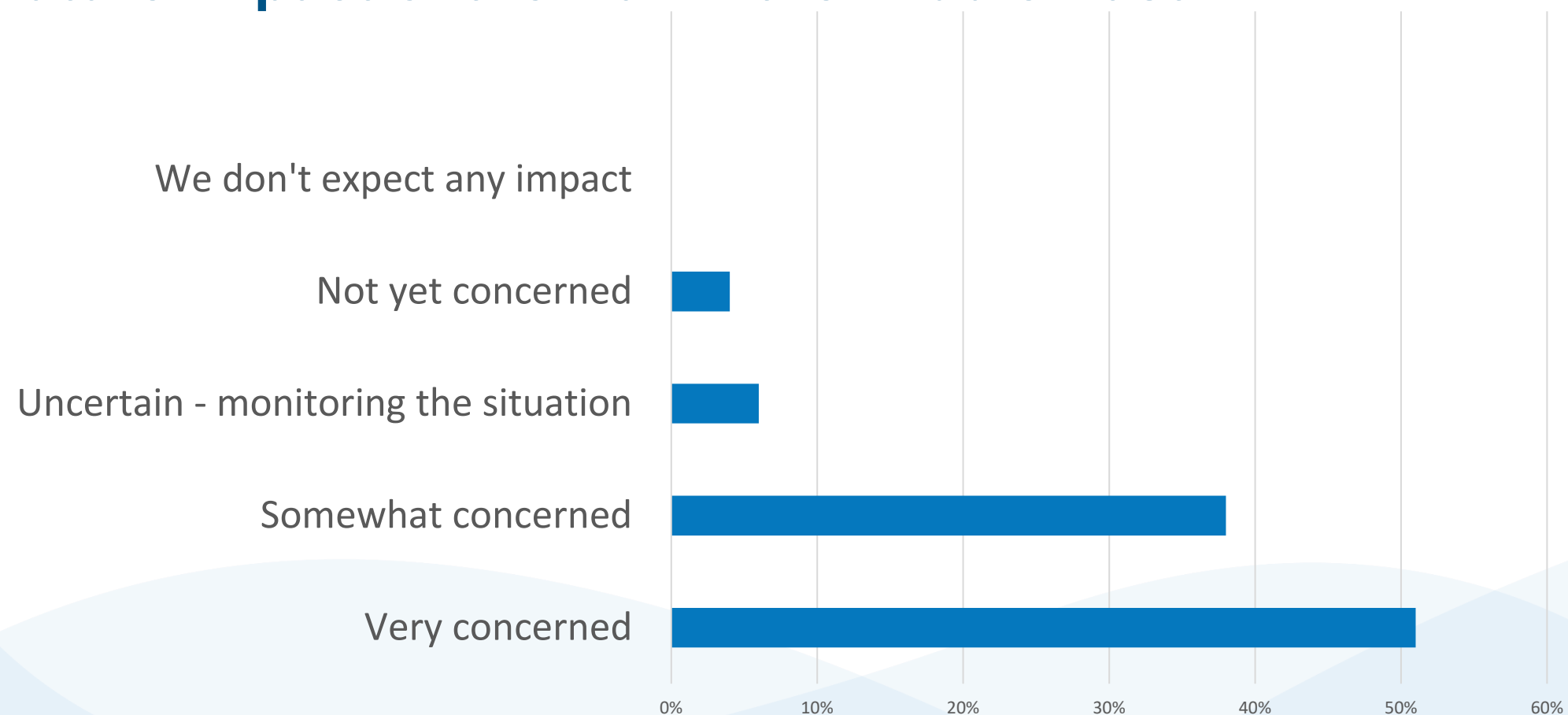


What is the current impact of the war in the Middle East on your ELT business?



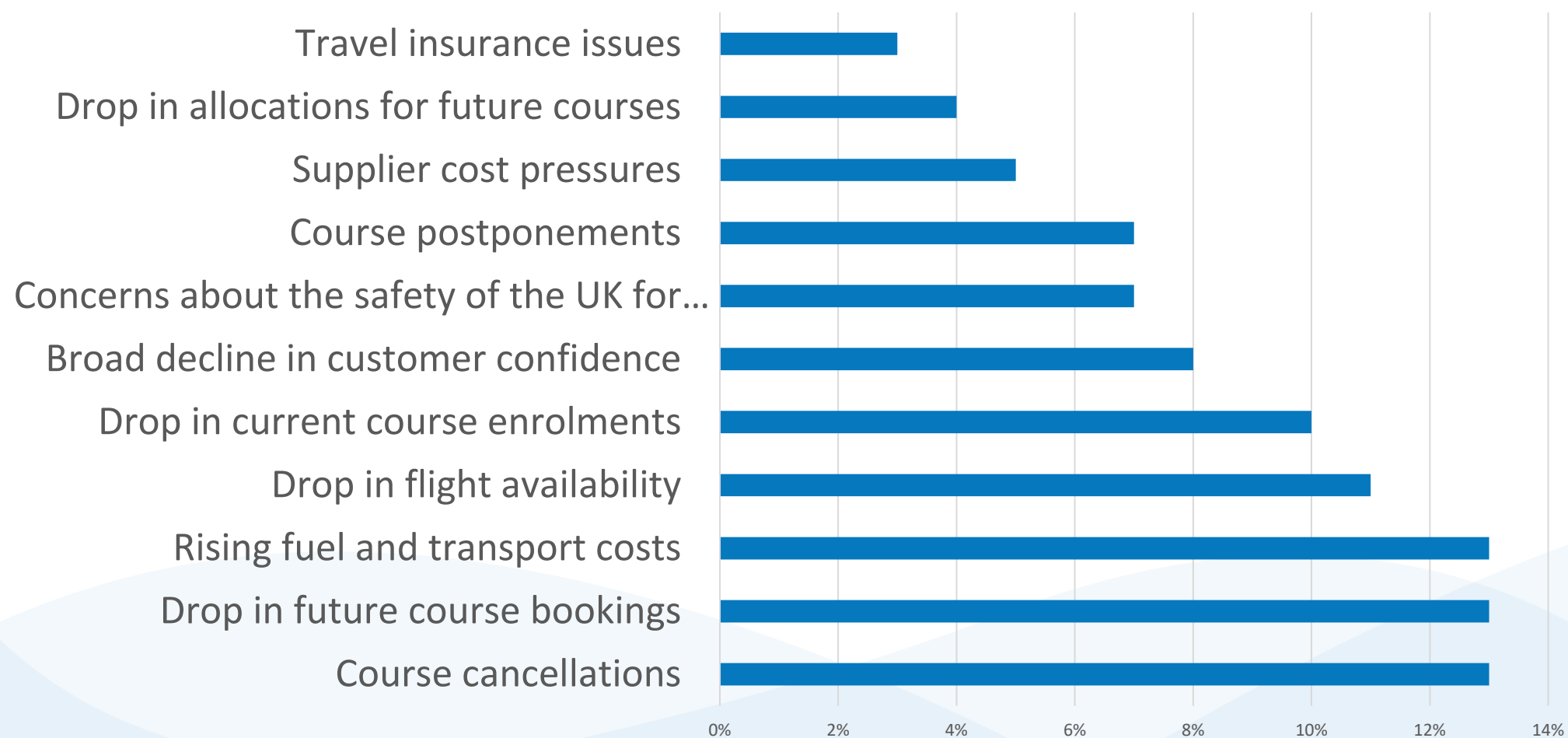


How concerned is your organisation about the future impact of the war in the Middle East?





What specific impacts have you already seen?





Look out for the next impact
survey mid-May 2026