



# **War in the Middle East: UK ELT sector impact survey**

Survey 2 findings  
May 2026



## Introduction

This is the second survey capturing English UK members' perceptions of the impact of the war in the Middle East on their businesses.

It aims to understand shared sentiment rather than provide quantitative measures of impact. As a perception-based survey, results may skew negative (as those most concerned are more likely to respond). Findings should therefore be interpreted in this context.

We will continue to repeat the survey and monitor sentiment and impacts.

### **Survey 2 (May 2026):**

- 63 responses (up from 47 responses in April, +25%), representing 23% of the total English UK membership.
- Levels of concern were higher than in the first edition, although the proportion of respondents reporting specific impacts to date did not increase.



## Survey responses

**Total responses: 63 (23% of member centres).** 62% of these respondents had also completed survey 1 in April

Ownership type:

- Private sector and independently owned: 79% (50 responses)
- Private sector and chain or group: 13% (8 responses)
- State sector: 8% (5 responses)

Provision type/ focus:

- Year-round centres adults and/ or juniors: 68% (43 responses)
- Seasonal centres juniors only: 30% (19 responses)
- Seasonal centres adults and juniors: 2% (1 response)



## How have levels of concern changed in the last month?

Levels of concern have increased for many respondents since April

- 37% of respondents are significantly more concerned
- 22% are somewhat more concerned
- 33% have about the same level of concern as in April 2026
- 6% are less concerned



## How has the measurable impact of the war changed?

Mixed perspectives on change in measurable impact since April

- 14% feel the measurable impact has worsened considerably
- 40% feel it has somewhat worsened
- 35% feel the measurable impact is the same
- 11% feel the situation has improved



## General impact and level of concern

Impact and level of concern remains elevated and higher than in the April survey

**Impact to date** (April survey 1 figures in brackets):

- 80% (62% in survey 1) said it had either a significant or minor impact
- 20% (36% in survey 1) said it was too early to tell/ situation is still developing
- 0% (2% in survey 1) reported no impact/ does not expect any impact

**Future impact on their business:**

- 89% (also 89% in survey 1) were either very or somewhat concerned about future impact

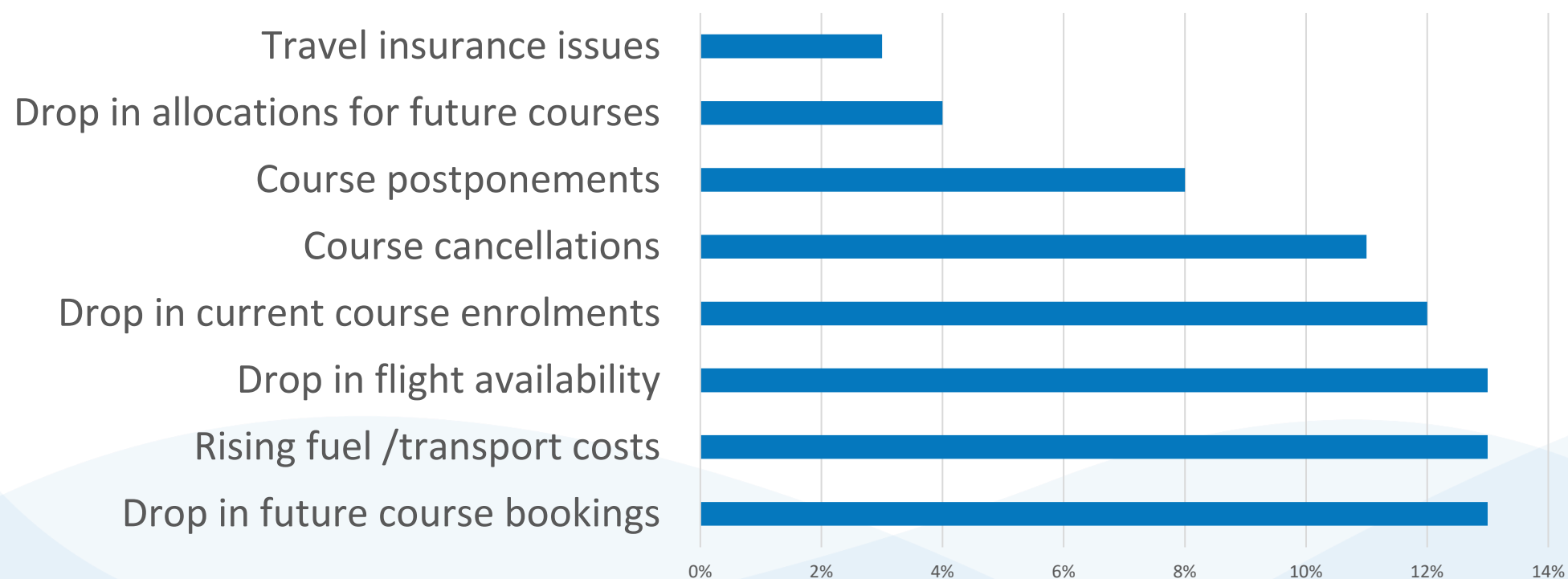
**Financial impact over the next 6 months:**

- 100% (82% in survey 1) expect moderate to severe financial impact



## Specific impacts seen already

The specific areas affected remained broadly consistent with April, with no significant change in prevalence





## What should English UK ask of government and other stakeholders?

Members' core priority asks remain stable, with one shift in emphasis.

We asked members to rank five asks in order of priority. The priority rankings are broadly unchanged from April, with "open for business" messaging rising to second. The priority order was:

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



## Further comments from members

Feedback highlights continued challenges, alongside some stabilisation in sentiment

- Many respondents asked for coordinated support from the UK Government and from English UK in promoting the UK as a safe and welcoming destination to agents, parents and other stakeholders.
- Some reported that in general numbers had steadied in line with 2025. However, bookings from MENA, Japan and China are all down with flight costs and flight availability the most significant factors here.
- Some mentioned that they feel the government's support for the travel and tourism industries more generally has been inadequate to date. This echoes similar wider sector feedback in surveys by the Tourism Alliance and others.
- On a positive note, some members commented that concerns about the UK's safety and welcome had eased compared with April 2026.



Look out for the next impact  
survey mid-June 2026