



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

Survey 3 findings  
June 2026



## Introduction

This is the third survey gathering English UK members' views on how the war in the Middle East is affecting their businesses.

It reflects shared sentiment rather than measuring impact quantitatively.

As a perception-based survey, the findings may over-represent negative experiences (as those most concerned are more likely to respond) and should be interpreted in this context.

We will repeat the survey at least once more to track how sentiment and reported impacts evolve over the summer.



## Summary

### Survey 3 (June 2026):

- 55 responses (vs. 63 in May and 47 in April), representing 22% of the total English UK membership
- 84% of respondents also completed Survey 2 in May
- Levels of concern appear broadly stable, with over half reporting no change from May, but more respondents reported rising rather than falling concern levels
- Since the first survey in April, the results show a clear shift from uncertainty to more tangible impacts across the sector
- 96% now expect at least some financial impact over the next 6 months
- Conditions remain challenging, particularly in MENA/Gulf markets but experiences vary, with some centres reporting stable summer performance



## Survey responses

**Total responses: 55 (representing 61 centres or 22% of the membership)**

Ownership type:

- Private sector and independently owned: 78% (43 responses)
- Private sector and chain or group: 13% (7 responses)
- State sector: 9% (5 responses)

Provision type/ focus:

- Year-round adults and juniors: 45% (25 responses)
- Year-round adults only: 24% (13 responses)
- Year-round juniors only: 4% (2 responses)
- Seasonal juniors only: 27% (15 responses)



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

Overall, levels of concern appear broadly stable, with over half of respondents reporting no change since May. It should be noted that levels of concern were higher in May than in April.

In June, a larger share reported increased rather than reduced concern.

- 27% of respondents are significantly more concerned
- 11% are somewhat more concerned
- 53% have about the same level of concern
- 9% are less concerned



## General impact and level of concern

Impact and level of concern remain high, with a majority (60%) indicating a significant current impact on their business.

### **Impact to date** (May survey 2 figures in brackets):

- 85% (80% in survey 2) reported it had had some level of impact
- 11% (20% in survey 2) said it was too early to tell/ situation is still developing
- 4% (0% in survey 2) reported no impact or none expected

### **Future impact on their business:**

- 81% (89% in survey 2) were either very or somewhat concerned about future impact

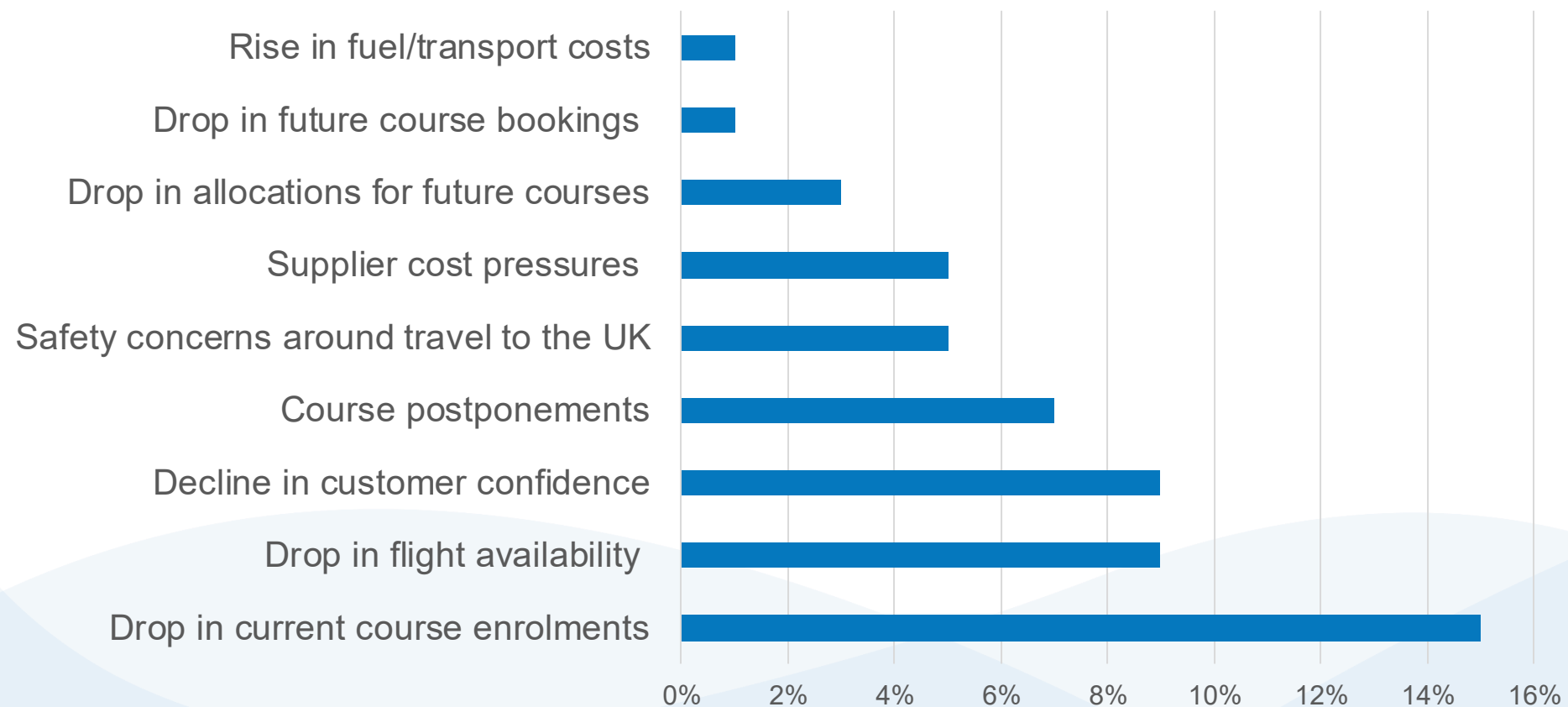
### **Financial impact over the next 6 months:**

- 82% (100% in survey 2) expect moderate to severe financial impact



## Specific impacts seen already

Falling enrolments and declining confidence are now the most reported impacts





## Specific impacts seen already

The overall pattern of reported impacts remains similar to May, with a mix of issues still affecting both student demand and operations.

But two shifts stand out:

- Customer confidence has weakened again, after improving slightly in May
- Falling course enrolments have increased sharply and are now the most reported impact

This suggests earlier concerns about future bookings are now translating into real drops in student enrolments.



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

We asked members to rank five priority asks. Priorities have shifted since May (based on average ranking across all responses).

The most significant change is that "open for business" messaging has risen from second to first, whilst "protecting airline capacity" has dropped from first to third.

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



## Further comments from members

Feedback highlights continued challenges across the sector, alongside some comments that their worst fears for summer 2026 had not materialised.

- Some reported weaker bookings from the Gulf, Japan, South Korea and China. Rising flight costs, flight cancellations and a general lack of customer confidence were all cited as reasons.
- MENA/Gulf market is expected to remain challenging into autumn.
- Some reiterated that they feel the government's support for affected travel and tourism industries has been inadequate, compounded by rising business taxes. One response was: 'We need help to survive'.
- A small number reported more stable conditions, with one describing summer 2026 as 'business as usual' for their centre, with student weeks higher than in previous years.



Look out for the next impact  
survey mid-July 2026