War in the Middle East: UK ELT sector impact survey

Survey 4 findings
July 2026

Introduction

- This is the fourth survey of English UK members on the impact of the war in the Middle East on their businesses
- It captures member sentiment rather than measuring impact quantitatively
- As a perception-based survey, findings may over-represent negative experiences, as those with greater concerns may be more likely to respond
- The survey will pause in August 2026
- We will review the situation and decide whether to run a further survey in September
- July received less than half the number of responses recorded in June, limiting the representativeness of the findings

Survey 4 summary

- 23 responses (vs. 55 in June, 63 in May and 47 in April), representing 10% of the total English UK membership (28 centres). The low response rate limits the value of this survey to some extent
- 96% of respondents also completed Survey 3 in June
- Levels of concern appear slightly lower, with 35% reporting no change from June, 39% significantly or somewhat more concerned and 26% somewhat less concerned
- Those completing the survey have however reported some tangible impact
- 100% of respondents expect at least some financial impact over the next 6 months
- Conditions remain challenging, particularly in MENA/ gulf markets

Survey 4 responses

Total responses: 23 (representing 28 centres or 10% of the membership)

Ownership type:

- Private sector and independently owned: 83% (19 responses)
- Private sector and chain or group: 9% (2 responses)
- State sector: 9% (2 responses)

Provision type/ focus:

- Year-round adults and juniors: 61% (14 responses)
- Year-round adults only: 26% (6 responses)
- Seasonal juniors only: 9% (2 responses)
- Seasonal: adults only: 4% (1 response)

How have levels of concern changed in the last month?

Overall, levels of concern appear broadly stable/ slightly lower, with 60% of respondents showing the same or less concern than in June

- 26% of respondents are significantly more concerned
- 13% are somewhat more concerned
- 35% have about the same level of concern
- 26% are less concerned

General impact and level of concern

Impact and level of concern remain relatively high, with a slight majority (52%) indicating a significant current impact on their business.

Impact to date (June survey 3 figures in brackets):

- 78% (85% in survey 3) reported it had had some level of impact
- 13% (11% in survey 3) said it was too early to tell/ situation is still developing
- 9% (4% in survey 3) reported no impact or none expected

Future impact on their business:

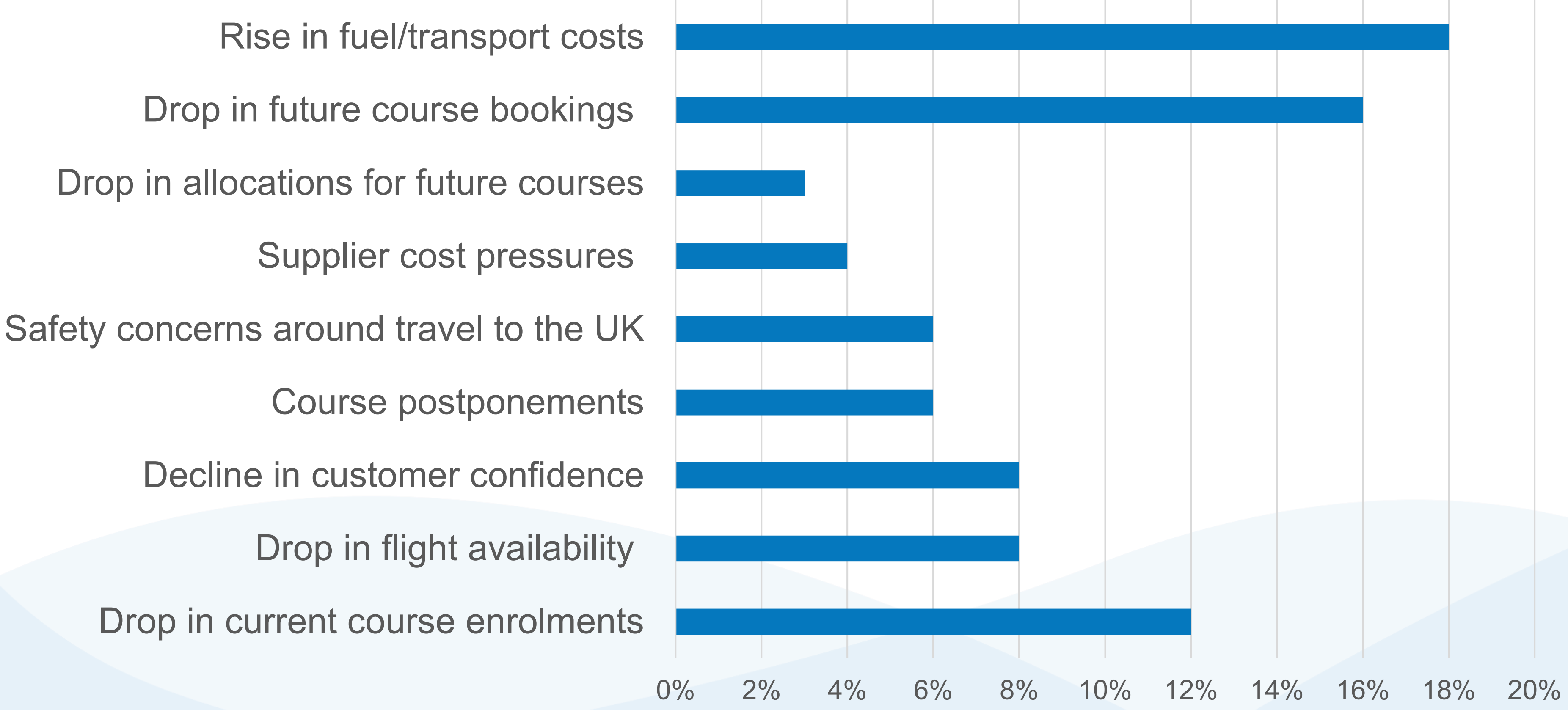
- 74% (81% in survey 3) were either very or somewhat concerned about future impact

Financial impact over the next 6 months:

- 74% (82% in survey 3) expect a moderate to severe financial impact

Specific impacts seen already

A rise in fuel/transport cots and a drop in future course bookings and are now the most reported impacts



Specific impacts seen already

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

Two shifts should be noted:

- A higher drop in future course bookings and/or allocations (20% of responses in total for both)
- Course cancellations (12% of responses) and a drop in current enrolments (also 12%) remain among the most significant specific impacts

This suggests concerns about future bookings are once again a significant concern for some respondents, after a drop in levels of future concern in June

What should English UK ask of government and other stakeholders?

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

The most significant change is that protection of airline capacity and routes has risen from fourth to second.

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

Further comments from members

- Comments were sparser than in previous months, reflecting the lower response rate
- Feedback highlights ongoing sector challenges across the sector, although some feared impacts on flight availability, flight costs and supplier costs have not materialised
- Declines in some markets appear to reflect longer-term trends rather than the conflict alone, though sharper falls in MENA/ Gulf markets coincide with the period since late February 2026

Impact survey paused for August 2026