



# **Middle East Conflict - Impacts Domestic Sentiment Tracker Published: May 2026**

# Introduction

- In April 2026, 4 questions on the impact of the conflict in the Middle East were added to the Domestic Sentiment Tracker survey for one wave only, in addition to the usual questions.
- The questions asked:
  - ***Thinking about the current conflict in Iran and neighbouring countries, has this had an impact on any travel plans you may have already had?***
  - ***Looking ahead to later this year (summer and beyond), how do you think the conflict in Iran and neighbouring countries will affect your travel plans?***
  - ***Which of the following possible economic impacts of the conflict in Iran and neighbouring countries have you heard about, if any?***
  - ***And how concerned are you about the following financial impacts?***
- The fieldwork for this wave was conducted between 1<sup>st</sup> – 7<sup>th</sup> April 2026
- The following results are from a nationally representative UK sample, of n=1,755 adults.
- The results (both, reports and data tables) are made publicly available and updated each wave at the following website: <https://www.visitbritain.org/domestic-sentiment-tracker>

# Topline Summary

- **Changing travel plans:**
  - A quarter of respondents (25%) have changed travel plans they may have already had due to the conflict, most commonly by choosing to not take a holiday (8%) or opting for a domestic holiday instead of going abroad (7%).
  - A larger share (31%) expect changes later this year, with many now considering domestic holidays (8%) or closer overseas alternatives (8%).
  - Domestic overnight trip intention for the next 12 months (78%, April 2026) are broadly in line with 2025 level (77%, April 2025), while overseas intentions (60%) are down on last year (65%) and below pre-conflict levels.
- **Economic impacts:**
  - A quarter of respondents expect to have less spending money (26%) by the summer, and a fifth (19%) already report that they have less spending money.
  - Cost-of-living concerns reach a two-year high since April 2024, with 62% now saying 'the worst is still to come'.
  - At least 9 in 10 are concerned about the conflict's general impact on the economy (92%), utility prices (91%) and inflation (90%), whilst 56% are 'very concerned' about utility prices.
  - Looking at cost barriers of a domestic overnight trip, the cost of fuel has spiked to levels last seen only at the peak of the cost-of-living crisis in March 2023; all other barriers have remained somewhat in line with the last wave.

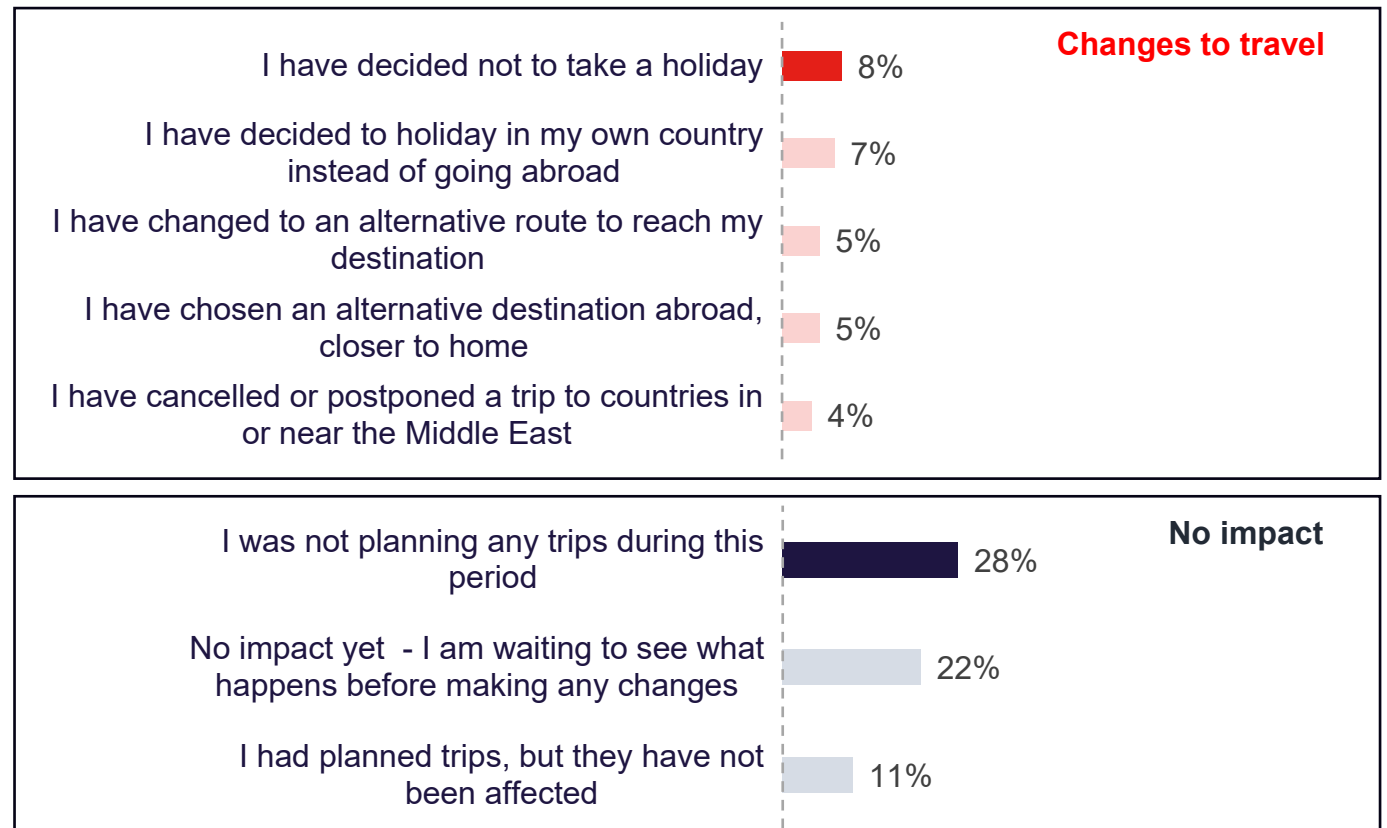
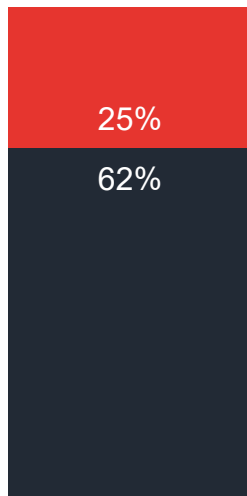


## Impact on travel plans

# In April 2026, a quarter of respondents had already changed travel plans, most commonly by choosing to not take a holiday or opting for a domestic holiday instead of going abroad

% who say how the conflict in Iran and neighbouring countries has affected travel plans they may have already had

■ Net: Changes to travel  
 ■ Net: No impact



Source: Domestic Sentiment Tracker, April 2026

Question: IR1. Thinking about the current conflict in Iran and neighbouring countries, has this had an impact on any travel plans you may have already had?

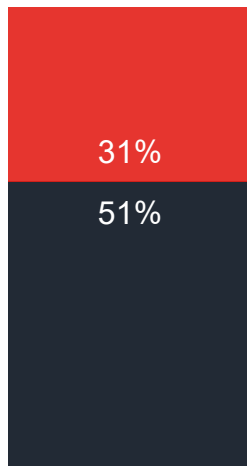
\*Multiple-choice question; responses may exceed the net total as more than one option could be selected.

Base: All respondents, April 2026, n = 1,755

# Almost a third of respondents expected their travel plans to be impacted later this year; those expecting to be affected were evenly split between choosing an overseas alternative closer to home and opting for a domestic break

% who say how the conflict in Iran and neighbouring countries will affect travel plans *later this year (summer and beyond)*

■ Net: Likely changes to travel  
 ■ Net: No anticipated impact



Source: Domestic Sentiment Tracker, April 2026

Question: IR2. Looking ahead to later this year (summer and beyond), how do you think the conflict in Iran and neighbouring countries will affect your travel plans?

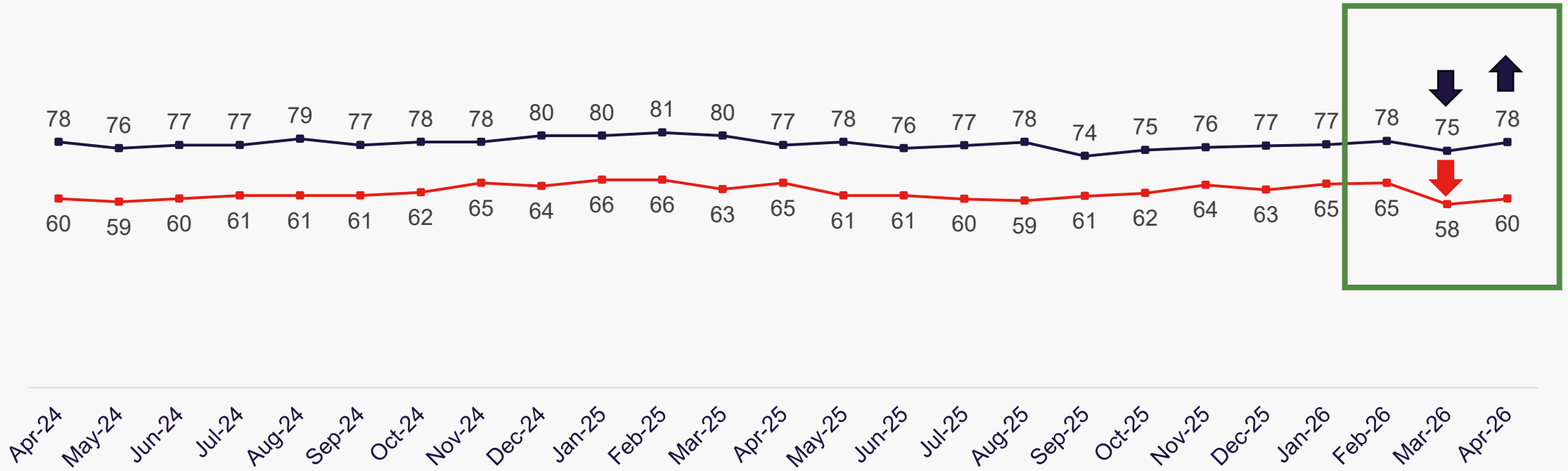
\*Multiple-choice question; responses may exceed the net total as more than one option could be selected.

Base: All respondents, April 2026, n = 1,755

# Looking at overnight travel intentions more broadly, both domestic and overseas travel intentions dipped in March 2026 with the outbreak of the conflict; however domestic recovered in April 2026

% who anticipate going on any overnight UK and overseas trips in the NEXT 12 MONTHS, Wave-on-wave, UK

—■— UK overnight trip    —■— Overseas overnight trip



Source: Domestic Sentiment Tracker, April 2026

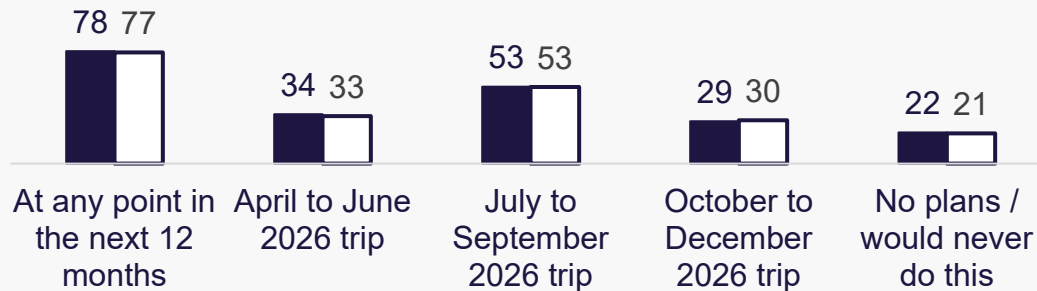
Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break?

Base: All respondents, April 2026, n = 1,755

# Overseas travel intentions remain lower than last year as consumers remain cautious about flight cancellations, route availability and jet fuel issues whilst domestic intentions remain level

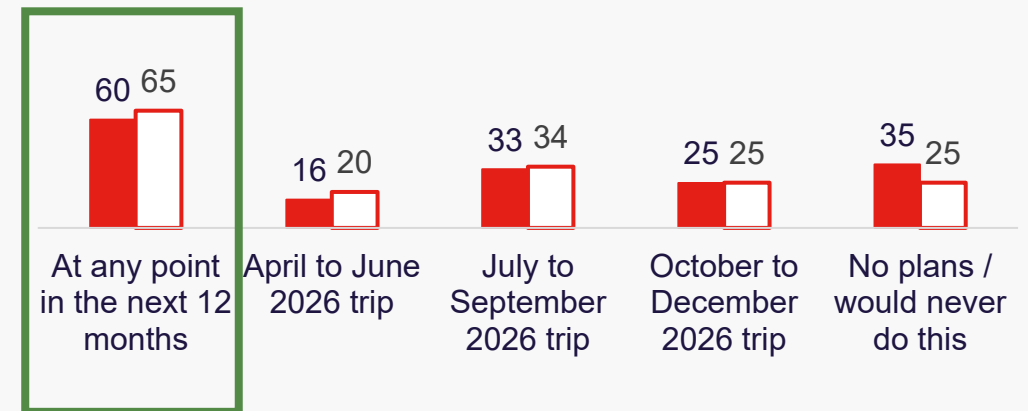
% who anticipate going on any **UK overnight** trips, April 2026, UK

■ April 2026 Data □ April 2025 data



% who anticipate going on any **overseas overnight** trips, April 2026, UK

■ April 2026 data □ April 2025 data



Source: Domestic Sentiment Tracker, April 2026

Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break?

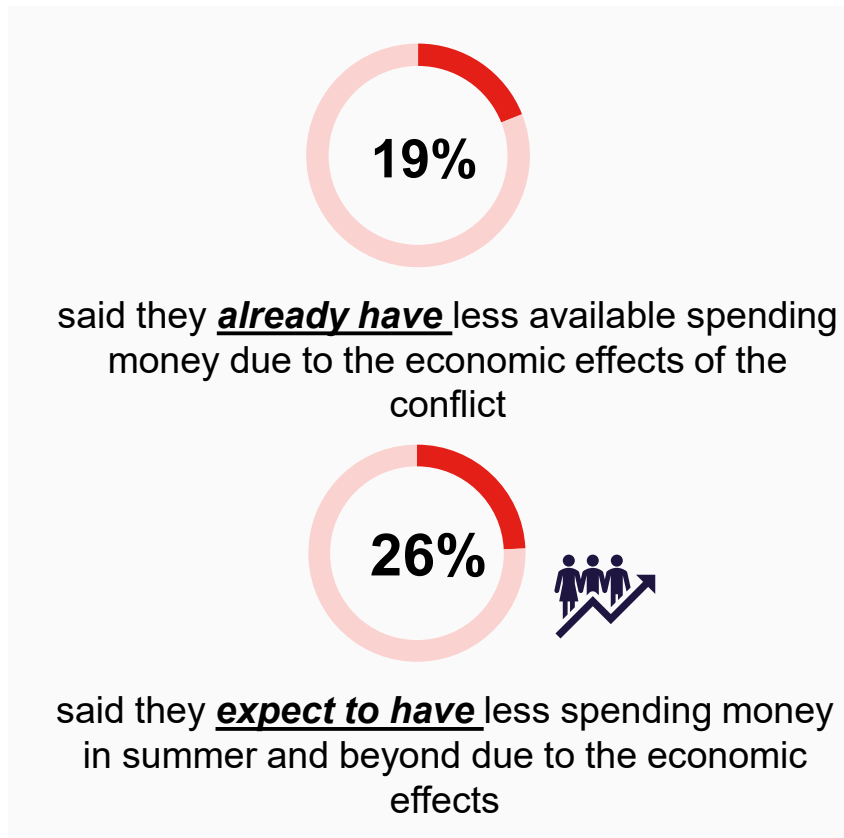
Base: All respondents, April 2026, n = 1,755



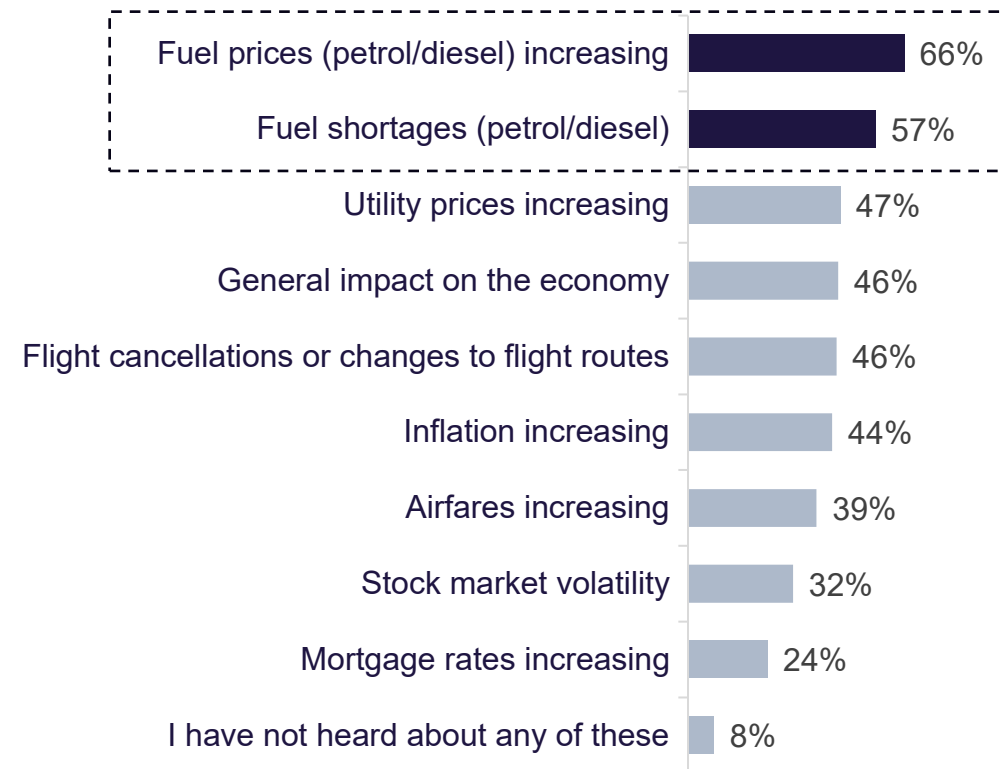
# Financial Impacts

Two children standing outside Wheeler's Oyster bar. Location: Whitstable, England.  
© VisitBritain/Hannah Argyle

# In terms of financial impact, at least 1 in 4 expect to have less spending money later in the year due to the current conflict, with fuel prices and shortages emerging as the economic impact most have heard about



% who say they have heard about possible economic impacts of the conflict in Iran and neighbouring countries:



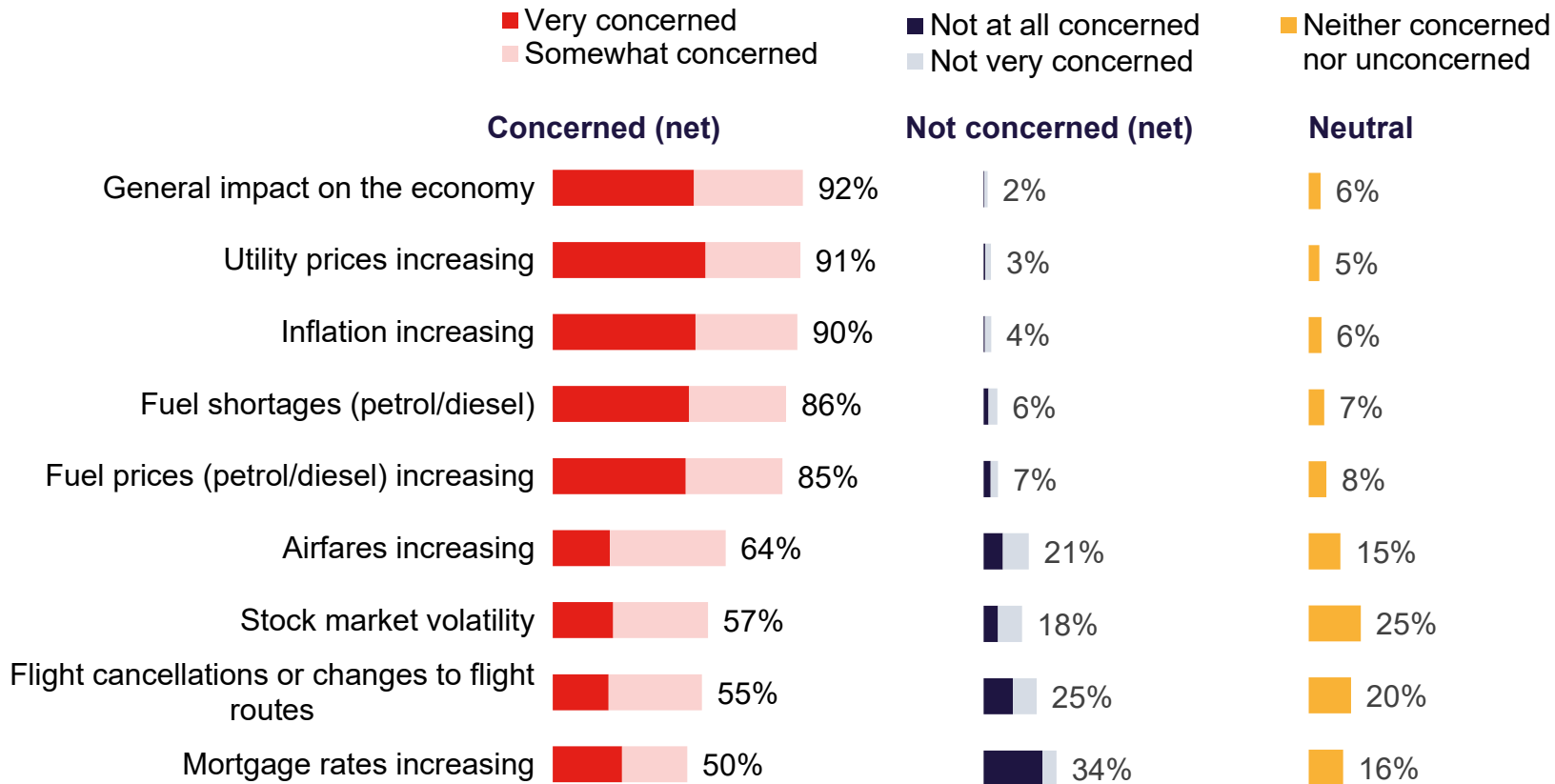
Source: Domestic Sentiment Tracker, April 2026

Question: IR1. Thinking about the current conflict in Iran and neighbouring countries, has this had an impact on any travel plans you may have already had? IR2. Looking ahead to later this year (summer and beyond), how do you think the conflict in Iran and neighbouring countries will affect your travel plans? IR3a. Which of the following possible economic impacts of the conflict in Iran and neighbouring countries have you heard about, if any?

Base: All respondents, April 2026, n = 1,755

# Over 90% are concerned about the conflict's general impact on the economy, utility prices and inflation

% who say how **concerned** they're about each of the following economic impacts of the conflict in Iran and neighbouring countries

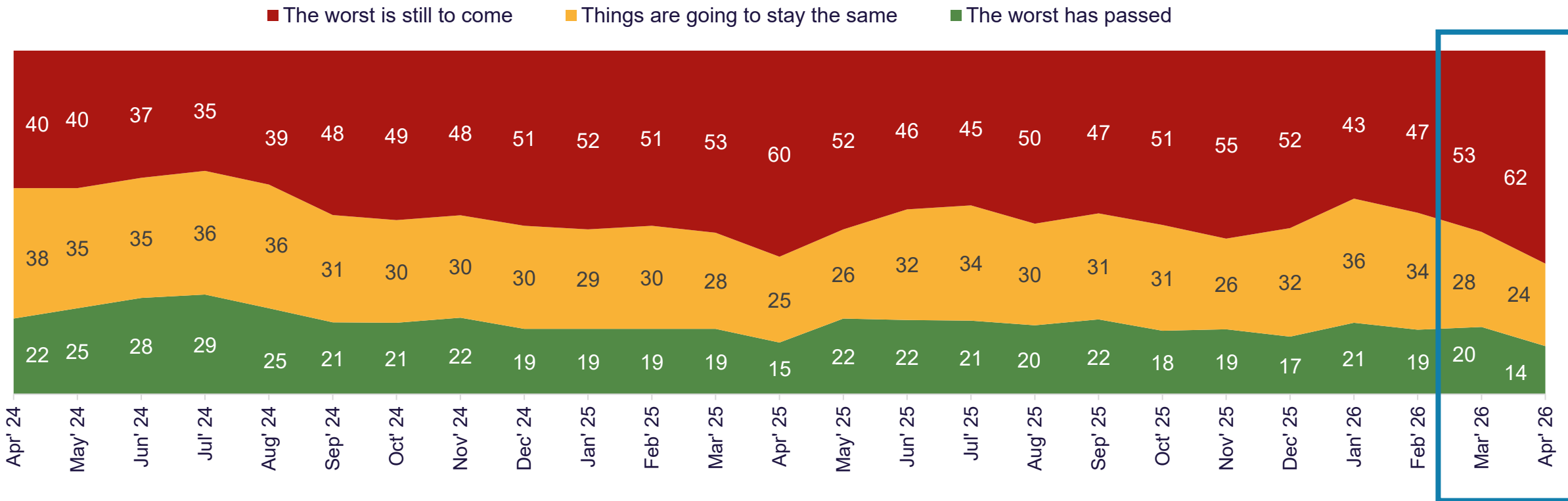


## Top 5 economic impacts respondents are 'very concerned' about:

1. Utility price increasing 56%
2. Inflation increasing 53%
3. General impact on the economy 52%
4. Fuel shortages 50%
5. Fuel prices increasing 49%

# Cost of living perceptions have also continued to worsen in April 2026, with 62% now saying that ‘the worst is still to come’, the highest level recorded in the past two years

Perception of the situation with regards to cost-of-living crisis, percentage, wave-on-wave, UK



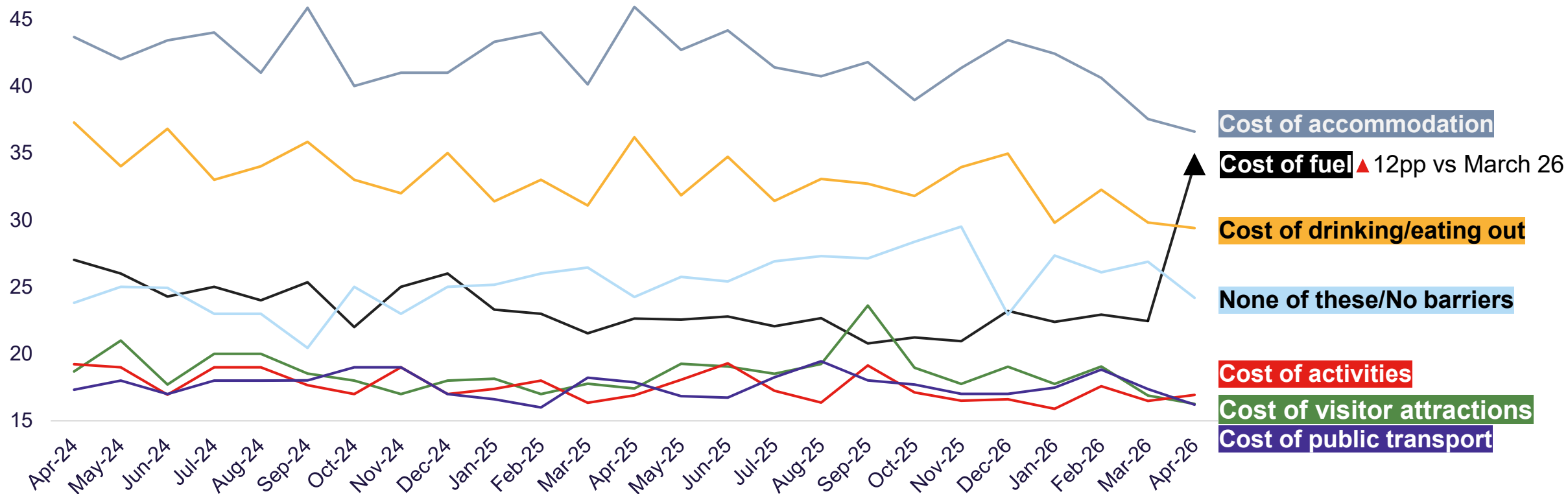
Source: Domestic Sentiment Tracker, April 2026

Question: Q7b: And now regarding the ‘cost of living crisis’ in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion?

Base: All respondents, April 2026, n = 1,755

# Focusing on barriers related directly to the cost of a domestic overnight trip, the cost of fuel has spiked to levels last seen only at the peak of the cost-of-living crisis, in March 2023 – all other barriers have remained somewhat in line with the last wave

Individual cost barriers to taking UK holidays and short breaks in next 6 months, percentage, wave-on-wave, UK



Source: Domestic Sentiment Tracker, April 2026

Question: VB7bii. Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?

Base: April 2026 = 1,755



**Thank You**

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