



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 were as follows:
 1. Thinking about the current conflict in Iran and neighbouring countries, has this had an impact on any travel plans you may have already had?
 2. 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?
 3. Which of the following possible economic impacts of the conflict in Iran and neighbouring countries have you heard about, if any?
 4. And how concerned are you about the following financial impacts?
- The fieldwork for this wave was conducted between 1st to 7th April 2026.
- The following results are from a nationally representative UK sample of 1,755 adults.
- The results (both, reports and data tables) are made publicly available at the following website:
<https://www.visitbritain.org/domestic-sentiment-tracker>.

Topline Summary

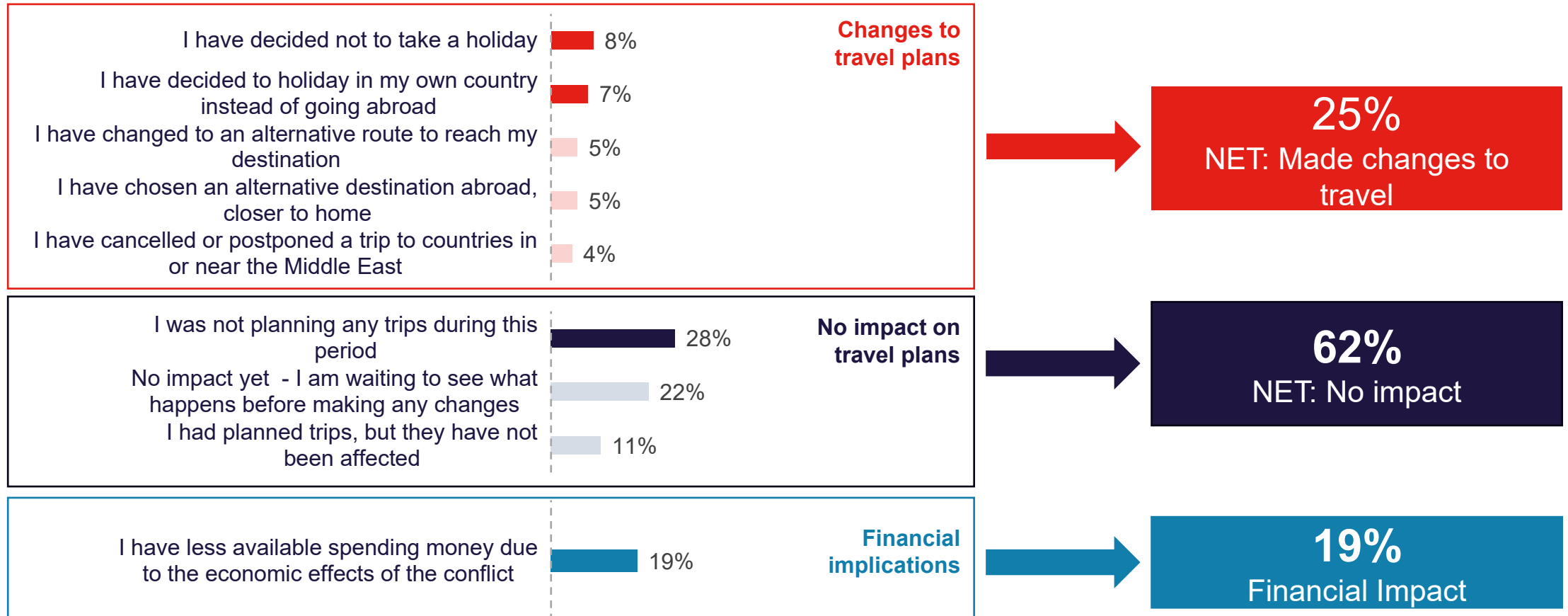
- **Changing travel plans:**
 - A quarter of UK adults (25%) have changed travel plans they may have already had due to the conflict, most commonly by choosing to not take a holiday (8%) or opting for a domestic holiday instead of going abroad (7%).
 - A larger share (31%) expect changes later this year, 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 UK adults 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 UK adults had already changed travel plans, most commonly by choosing to not take a holiday or opting for a domestic holiday instead of going abroad.

Impact of the conflict in Iran and neighbouring countries on existing travel plans* [%]



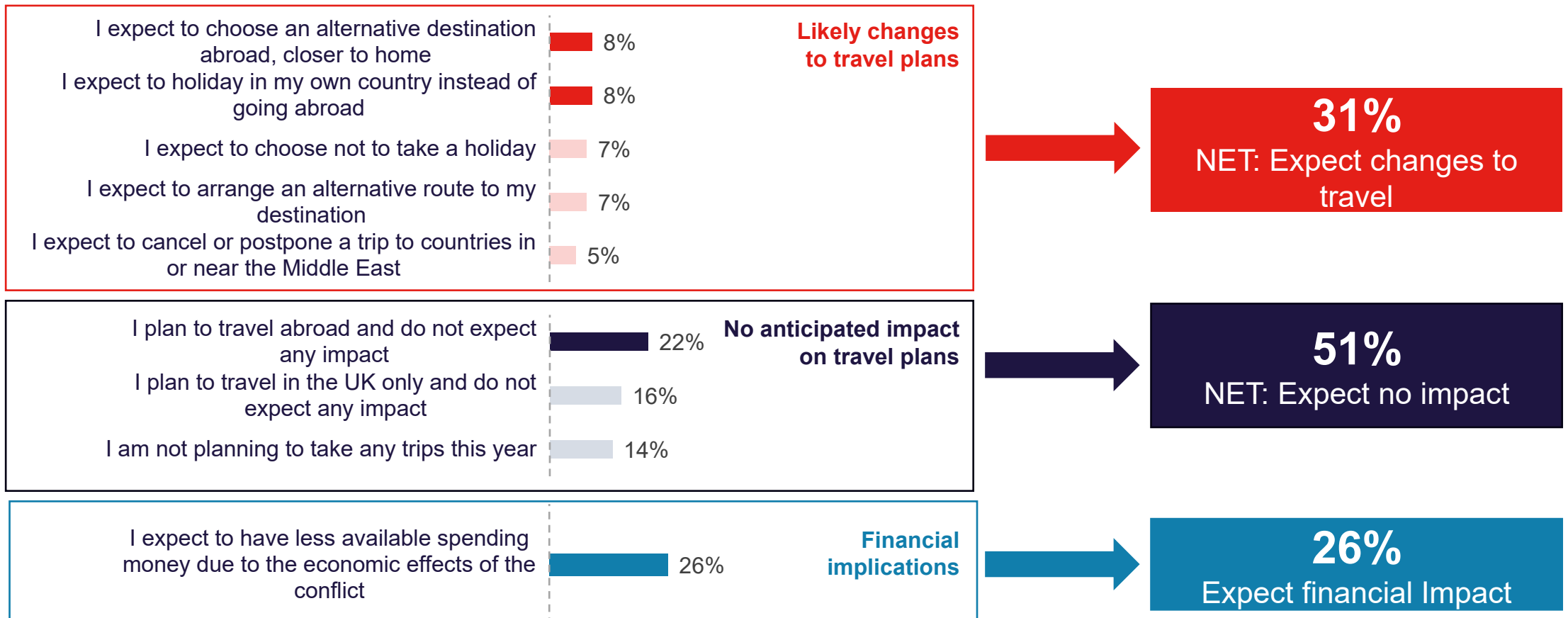
Source: Domestic Sentiment Tracker, April 2026; Base: All respondents, n = 1,755

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.

Looking forward, almost a third of UK adults expected their travel plans to be impacted. Those anticipating an impact expect to choose an alternative destination closer to home or opting for a domestic break.

Impact of the conflict in Iran and neighbouring countries on travel plans later this year (summer and beyond)* [%]

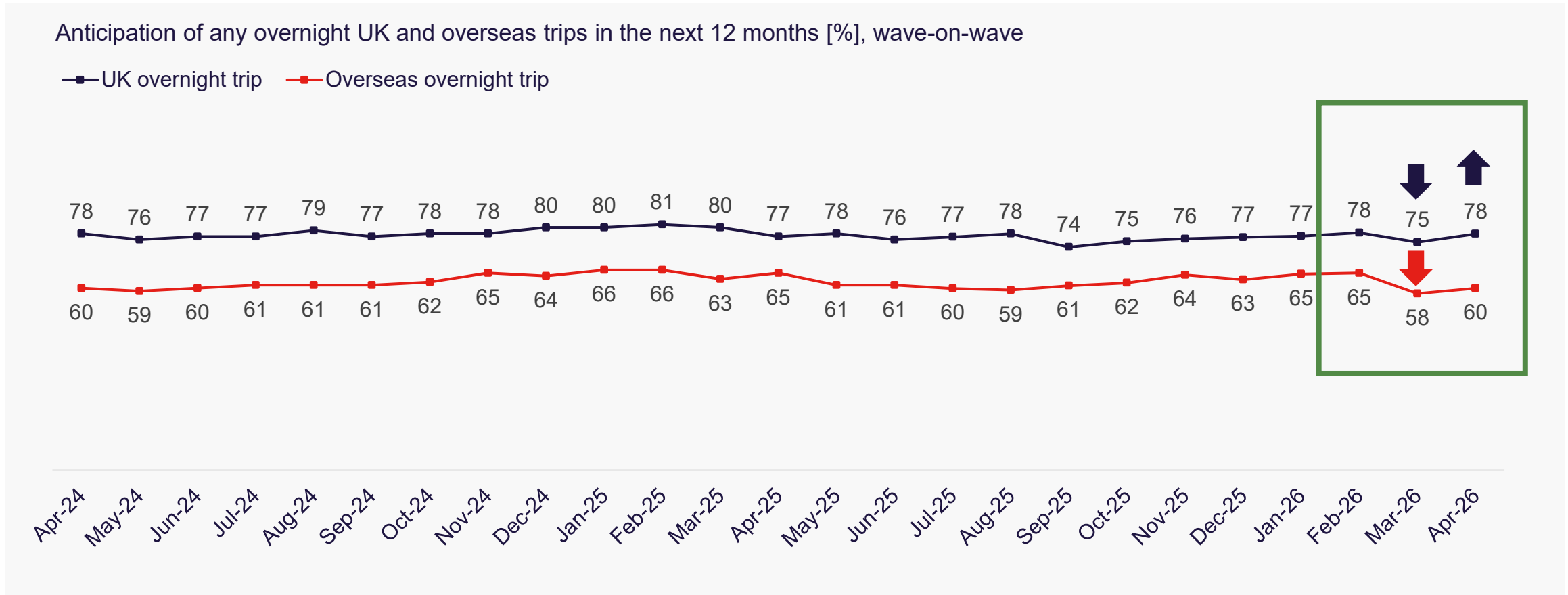


Source: Domestic Sentiment Tracker, April 2026; Base: All respondents, n = 1,755

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.

Overseas travel intentions declined in March 2026 and stayed at the lower level in April, while domestic briefly dipped in March and returned in April.

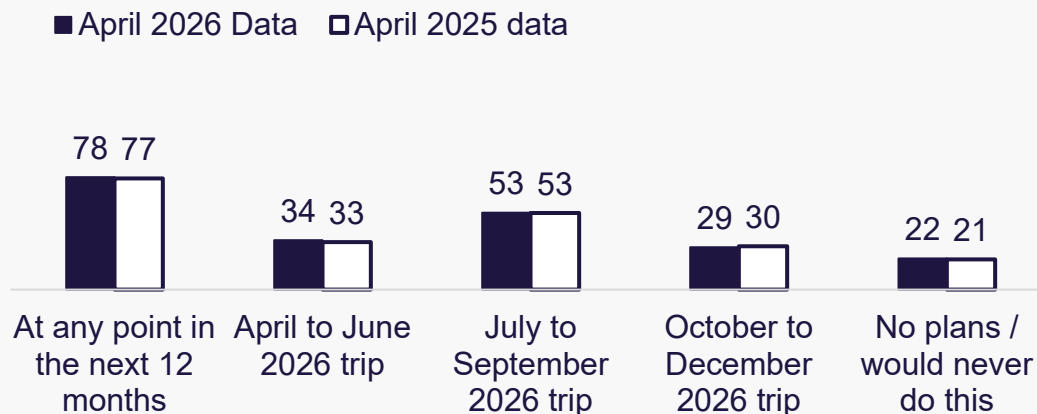


Source: Domestic Sentiment Tracker, April 2026; Base: All respondents, n = 1,755

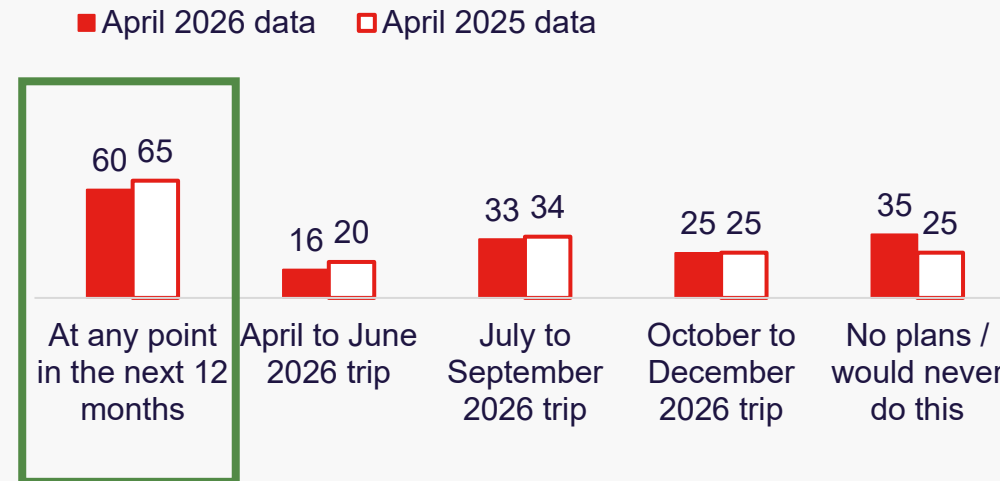
Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when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

Overseas travel intentions remain lower than last year especially in the near term, as consumers remain cautious about flight cancellations, route availability and jet fuel issues whilst domestic intentions remain level.

Anticipation of any UK overnight trips [%], April 2026



Anticipation of any overseas overnight trips [%], April 2026

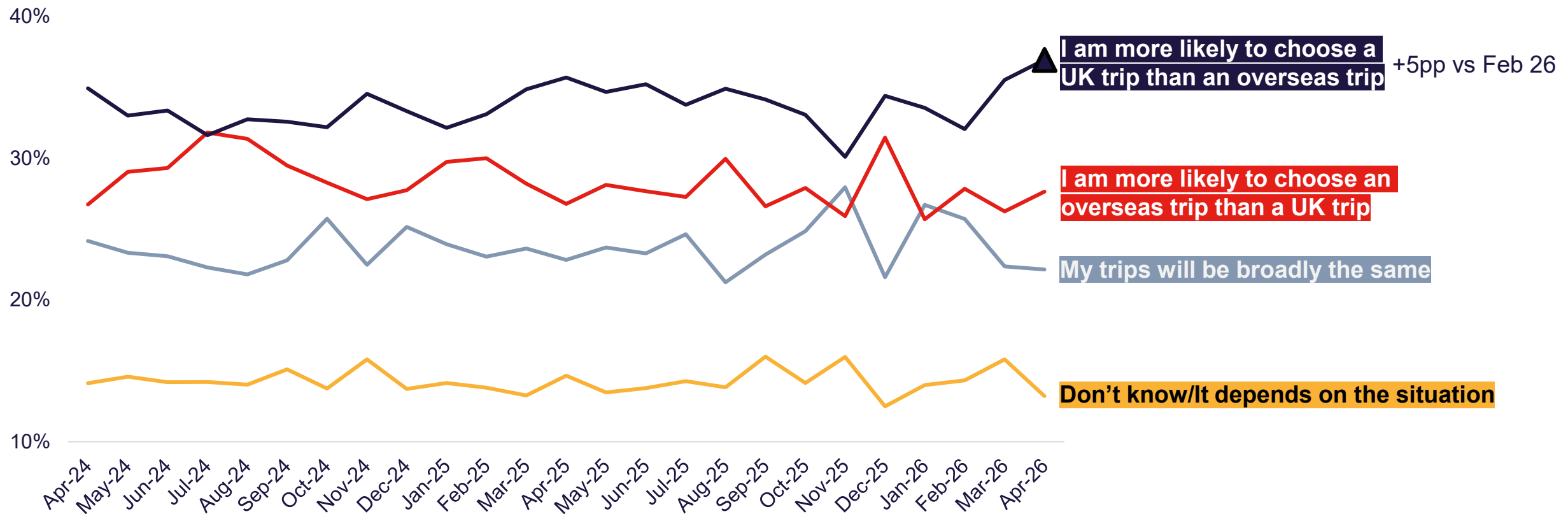


Source: Domestic Sentiment Tracker, April 2026; Base: All respondents, n = 1,755

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?

Preference for domestic holidays over the next 12 months has increased since February 2026, while preference for overseas travel has remained broadly stable in the same period.

Travel preference over the next 12 months vs the last 12 months [%], wave-on-wave

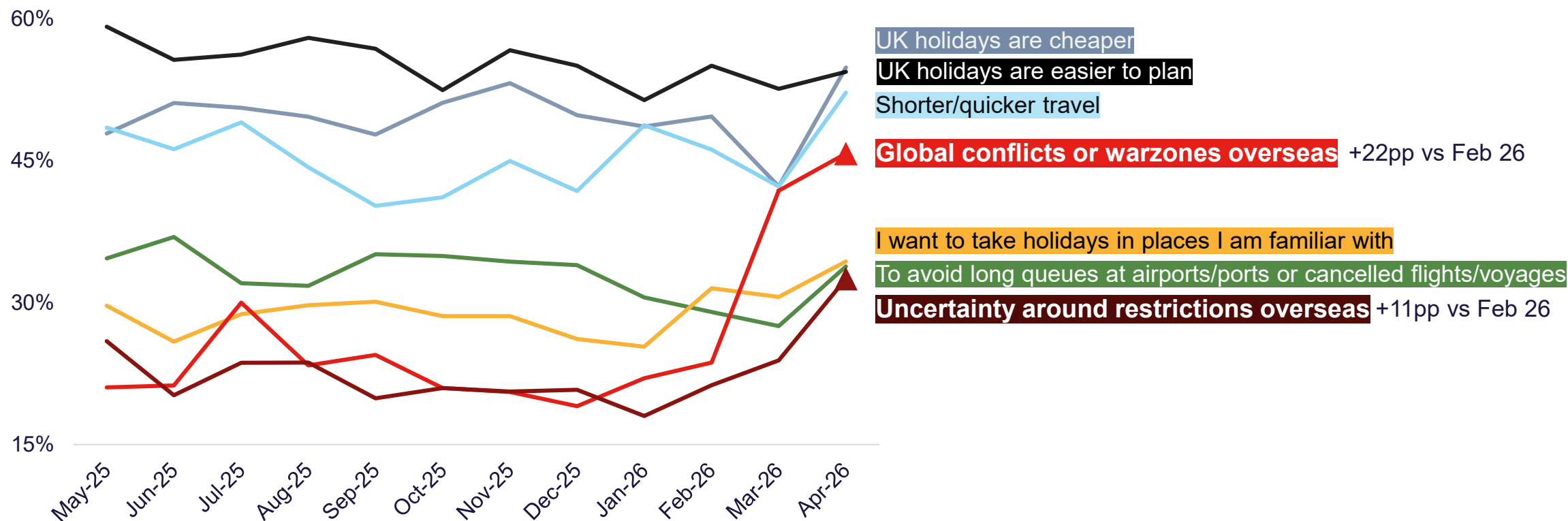


Source: Domestic Sentiment Tracker, April 2026; Base: All respondents, n = 1,755

Question: VB2j: Thinking of the next 12 months, how different do you think your short break/holiday choices will be compared to the last 12 months?

As for reasons for domestic preference, ‘global conflict’ and ‘uncertainty around restrictions overseas’ have shown the largest increases since February 2026.

Top reasons for domestic trip preference [%], wave-on-wave



Source: Domestic Sentiment Tracker, April 2026; Base: All respondents, n = 1,755
 Question: VB2k. Why are you more likely to choose a UK trip than an overseas trip?



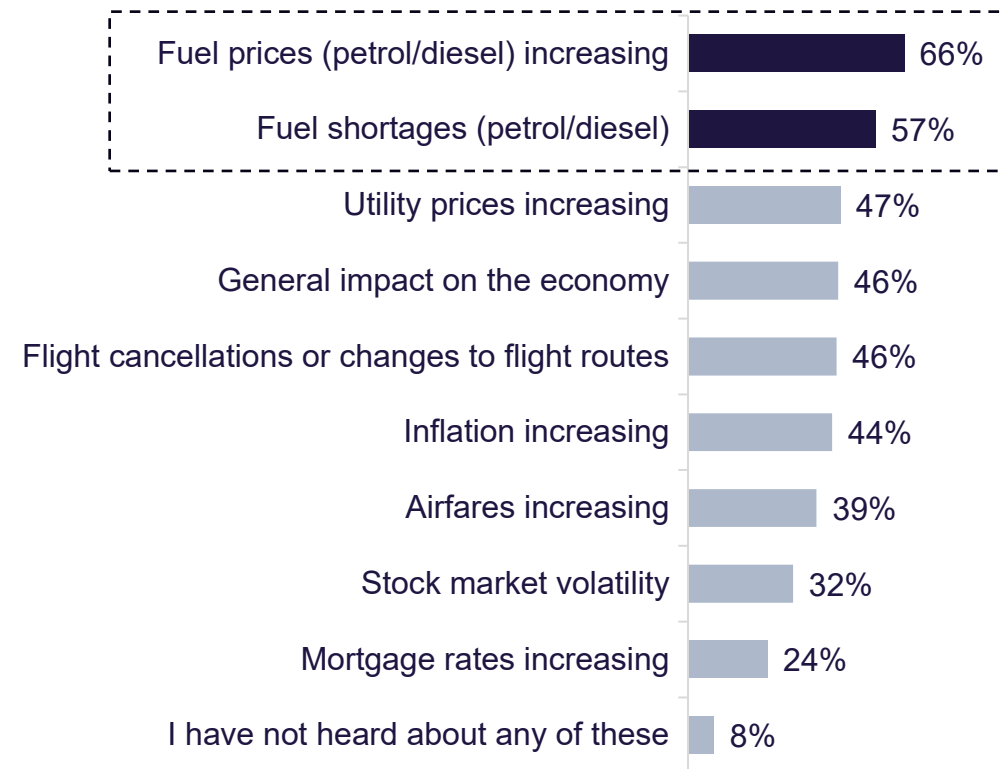
Financial Impact

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.



Awareness of possible economic impacts of the conflict in Iran and neighbouring countries [%]

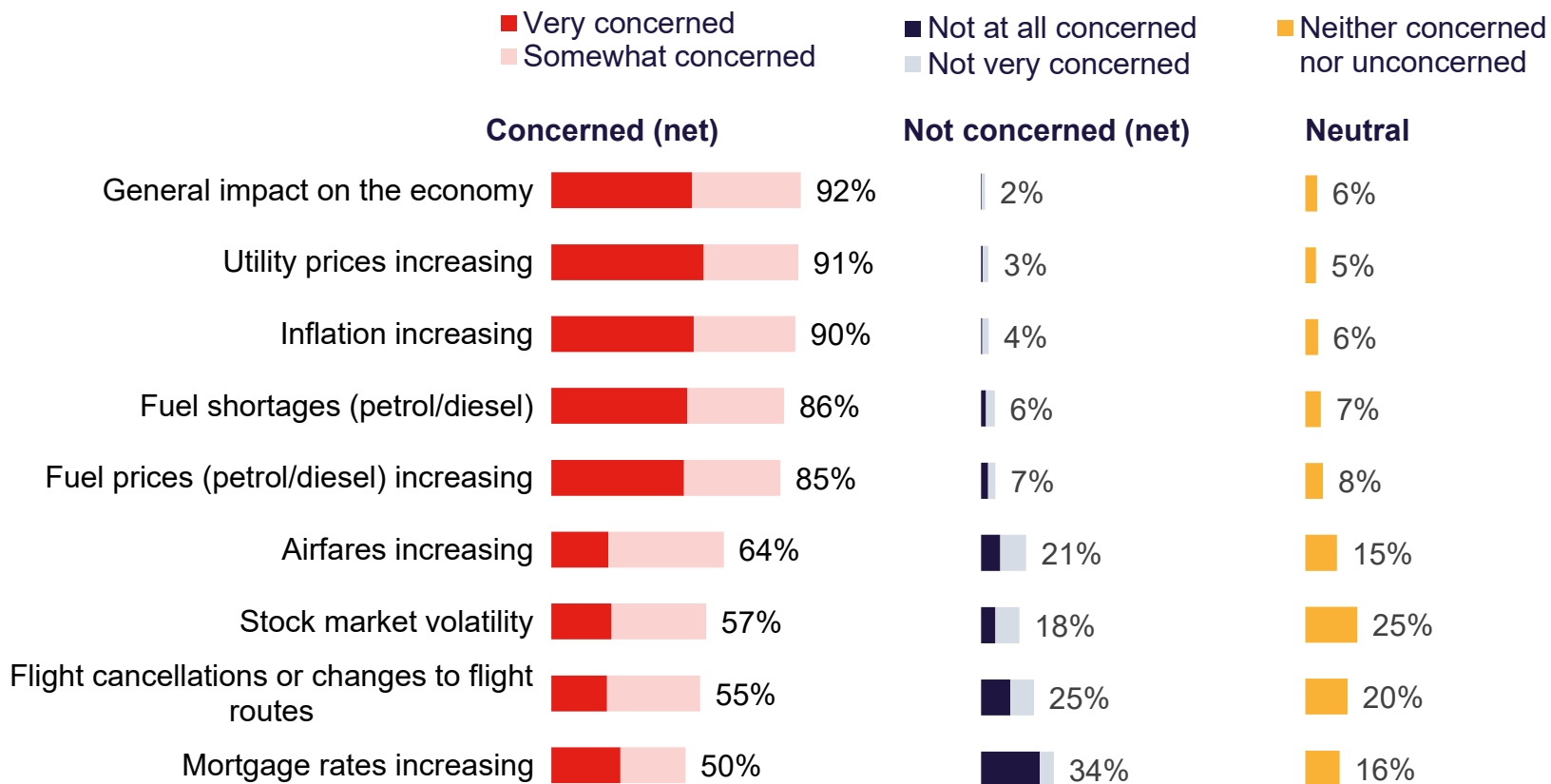


Source: Domestic Sentiment Tracker, April 2026; Base: All respondents, n = 1,755

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?

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

Level of concern about possible economic impacts of the conflict in Iran and neighbouring countries [%]

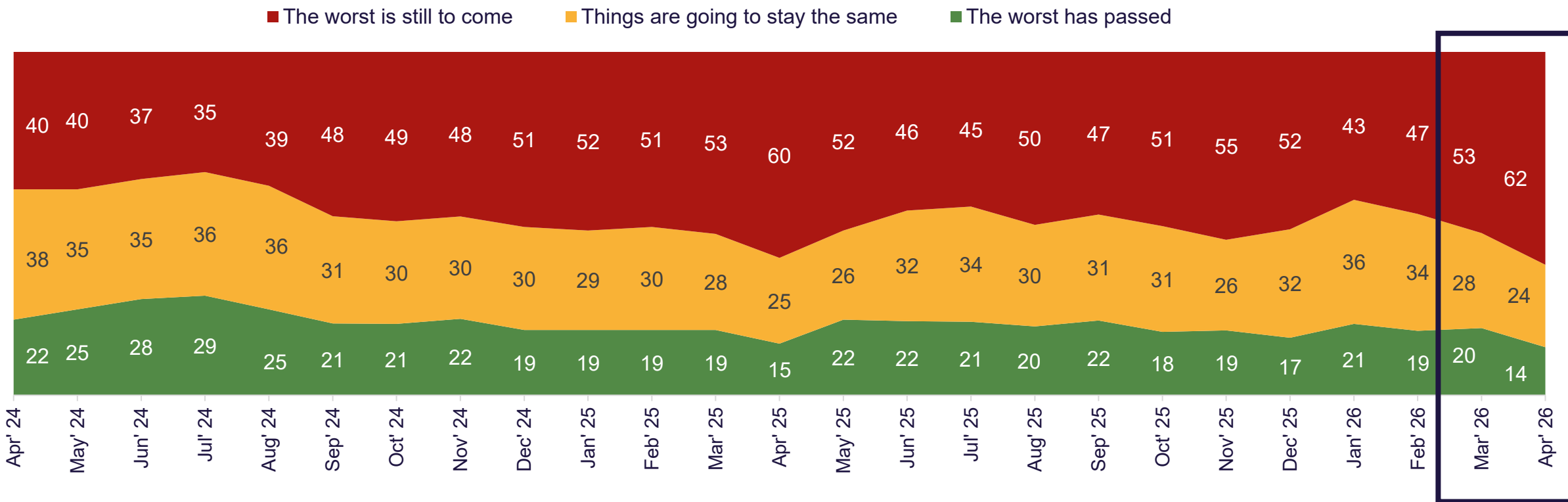


- Top 5 economic impacts respondents are 'very concerned' about:**
1. Utility price increasing 56%
 2. Inflation increasing 53%
 3. General impact on the economy 52%
 4. Fuel shortages 50%
 5. Fuel prices increasing 49%

Source: Domestic Sentiment Tracker, April 2026; Base: All respondents, n = 1,755
 Question: IR3b. And how concerned are you about the following?

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 [%]

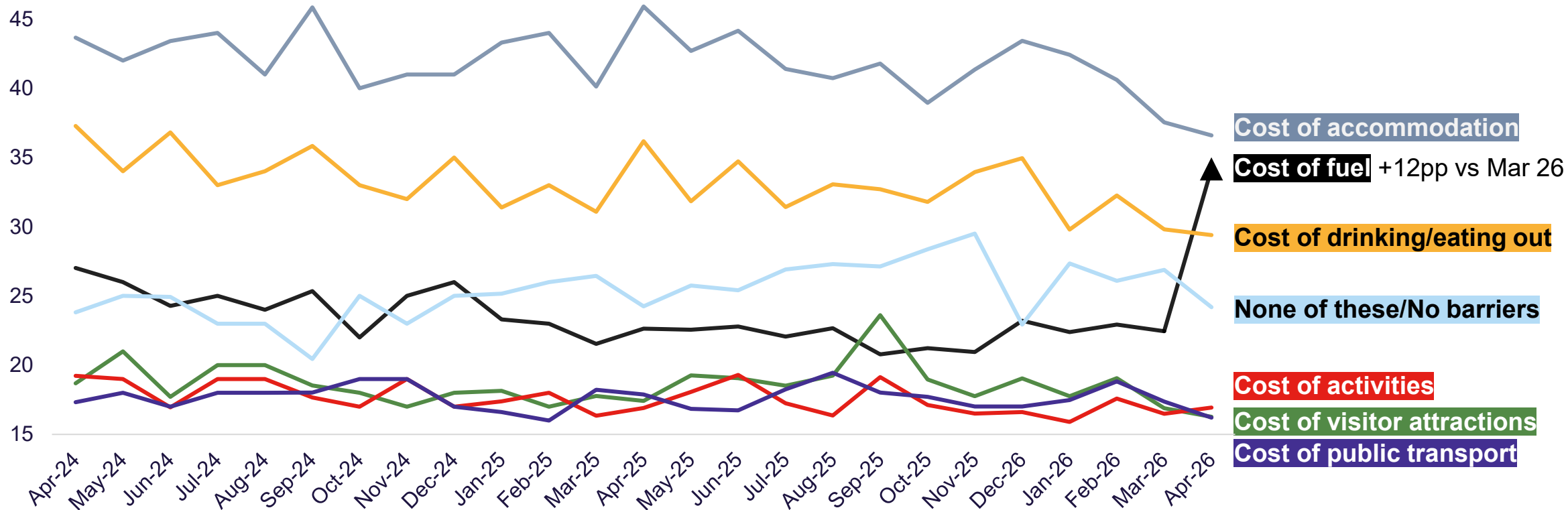


Source: Domestic Sentiment Tracker, April 2026; Base: All respondents, n = 1,755

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?

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 [%], wave-on-wave, UK



Source: Domestic Sentiment Tracker, April 2026; Base: All respondents, n = 1,755

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?