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CONSORTIUM FOR UNIVERSITY EXECUTIVE EDUCATION

Dcode Consulting

PULSE SURVEY
JUNE 2026

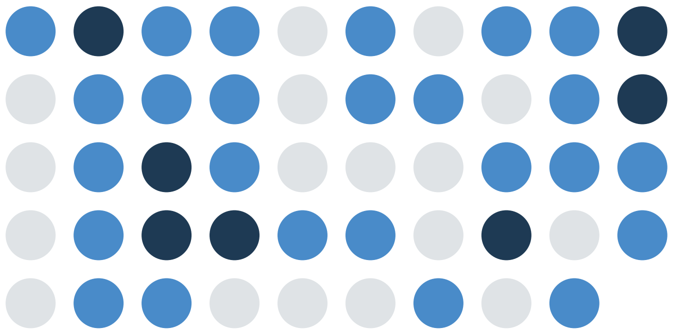
When conflict reaches the classroom

The Middle East conflict has become a sector-wide shock for executive education. Forty-nine UNICON member schools across five regions told us how it is landing, and where it is heading next.

UNICON, the global consortium of university executive education providers, runs short Pulse Surveys to take the industry's temperature on fast-moving issues. In June 2026, 49 member schools across five regions reported on how the Middle East conflict is hitting their operations, revenue and outlook.

EVERY DOT IS A MEMBER SCHOOL

Did the conflict affect your business operations?



Very much affected · 7 (14%)

Somewhat · 25 (51%)

Not affected · 17 (35%)

65%

of schools report operational impact — and more than half already feel it in revenue.

57% report revenue impact

But only 3 schools (6%)
report a severe revenue hit; the shock is wide, but mostly shallow.

THE SHOCK IN FOUR NUMBERS

65%	**57%**	**–19%**	**59%**
operations affected	revenue affected	avg. inquiry decline	faculty travel disrupted
of all 49 schools	of all 49 schools	among the 17 schools reporting a change	of all 49 schools

READ THIS STORY IN THREE ACTS

A thin, heavily exposed tail is absorbing most of the pain. The next three pages tell the story of how the shock spreads, what the numbers hide, and the road back.

How the shock travels

What members say is disrupting their business

30 written responses · themes may overlap

THREE ISSUES JOINTLY RANK #1

Each was mentioned in 11 member responses.

Programs paused or cancelled — 11
especially Gulf custom programs

Travel disruption — 11
faculty, staff and participants face restrictions or reluctance

Client pipeline slows — 11
proposals go quiet and buying cycles lengthen

OTHER REPORTED PRESSURES

Macro uncertainty and budget pressure — 7
oil, austerity and squeezed client budgets

Softer Middle East enrollment — 5
fewer regional participants on open programs

The hidden cost arrives first:
contingency planning, daily policy monitoring and anxious client management tax capacity before they tax revenue.

Operational and revenue impact move closely together

Of 49 schools, severity on operations and revenue moves tier by tier. No school jumps a tier.

17
report no operational impact
16 of them also feel nothing in revenue

25
somewhat affected in operations
20 already feel it somewhat in revenue

7
very much affected in operations
all 3 schools with severe revenue impact also report severe operational disruption

Why it matters: cancelled delivery is an early warning signal for revenue risk; watch operations to forecast the P&L.

> *“Multiple programs postponed/cancelled — and active proposals that have gone quiet.”*
> — Member school, open-text response

The trough is still ahead

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Demand is falling almost twice as fast as revenue

Average % change over the past 3 months, affected schools only

–19%

INQUIRIES
average among the **17 schools**
reporting an inquiry change

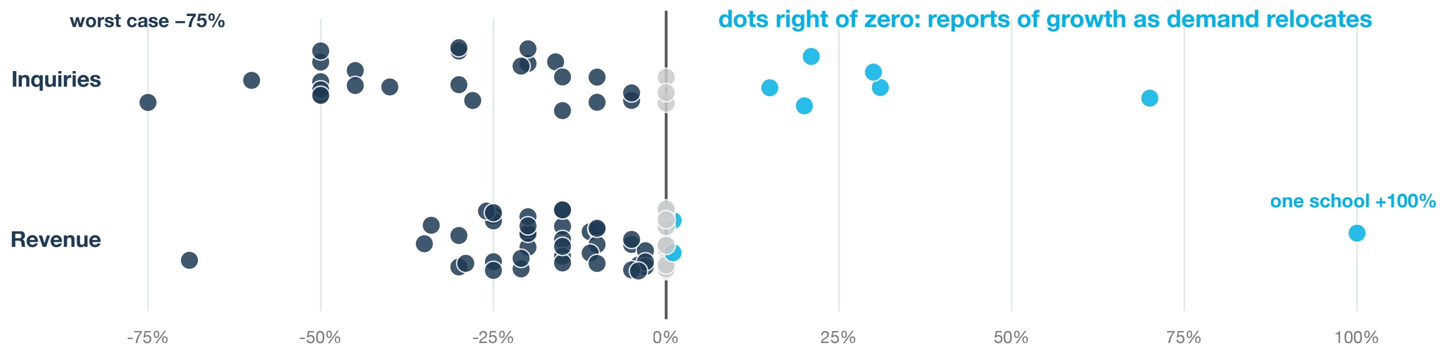
–11–12%

REVENUE
average among the **28 schools**
reporting revenue impact

1–2 sales cycles of lag
today's inquiry drop is next quarter's revenue drop

Every school's number; the spread the averages hide

Each dot = one reported % change. A school can appear once per measure (Open Enrollment and Custom plotted separately).



Custom programs are the exposed flank

Median decline among schools reporting a decline

OPEN ENROLLMENT

–30% inquiries

–15% revenue

CUSTOM PROGRAMS

–40% inquiries

–17.5% revenue

Custom work depends on in-region delivery and client mobility — exactly what the conflict has disabled.

And one in five schools is flying blind

20% cannot say whether inquiries have moved at all —
a visibility gap that will make the downturn harder to manage.

1 in 5

A long runway to recovery

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Faculty travel is the binding constraint; 6 in 10 schools disrupted

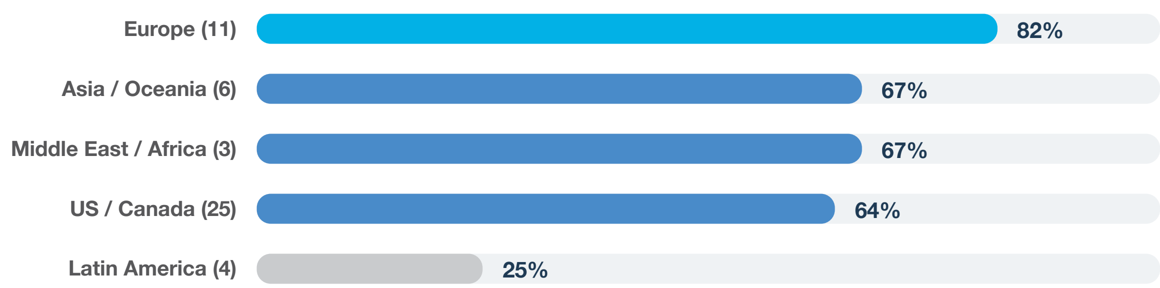
Faculty/staff stance on travel to the region · 10 icons = all 49 schools

One school selected two travel stances, so shares sum to more than 100%.

The twist: the hardest-hit schools keep flying; 5 of the 7 severely impacted travel with strict safeguards.
Less-exposed schools are more able to pause regional travel.

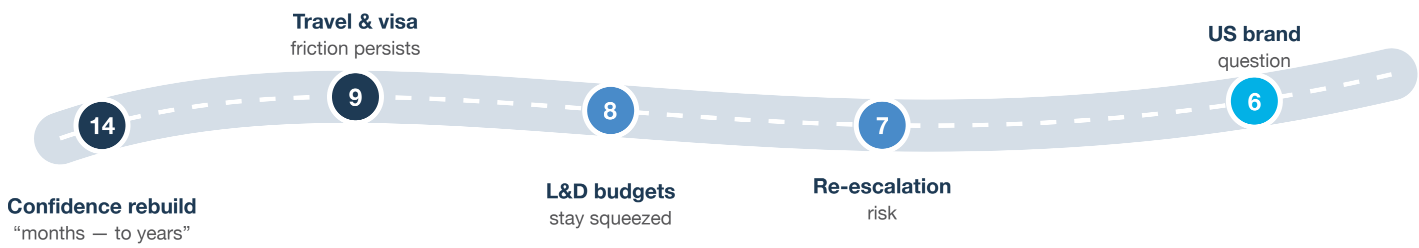
European schools report the highest operational impact among responding members

% reporting operational impact, by main office location · small bases, directional



What lingers after a ceasefire; the residual concerns, ranked

Numbers show how many members raised each concern · 48 written answers, themes may overlap



Six schools independently flag a reputational drag on US-based institutions — clients and learners hesitant to engage "as a matter of principle." For a consortium that is half North American, this is collective exposure worth tracking.

WHAT TO WATCH IN THE NEXT PULSE

1. Does revenue decline toward the –19% inquiry signal?
2. The post-ceasefire backlog: postponed programs returning all at once, straining delivery capacity.
3. Whether the US reputational drag shows up in enrollment and partnership data, not just sentiment.

Reading notes: inquiry/revenue % changes are averages among affected schools only (bases 17 and 28).
Travel shares sum to more than 100% (one school selected two stances).