



UN Tourism

World Tourism Barometer

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Market Intelligence, Policies and Competitiveness Department

International tourism up 2% in Q1 2026
amid growing uncertainty

Revised July 2026



UN Tourism

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World Tourism Organization (UN Tourism) Tel.: (+34) 91 567 81 00
C/ Poeta Joan Maragall 4 Website: www.untourism.int
28020 Madrid, Spain E-mail: info@untourism.int

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About the World Tourism Barometer

The *World Tourism Barometer* is a publication of the World Tourism Organization (UN Tourism) that monitors short-term tourism trends on a regular basis to provide global tourism stakeholders with up-to-date analysis on international tourism.

The information is updated several times a year and includes an analysis of the latest data on tourism destinations (inbound tourism) and source markets (outbound tourism). The Barometer also includes three times a year a Confidence Index based on the UN Tourism Panel of Experts survey, which provides an evaluation of recent performance and short-term prospects on international tourism.

The UN Tourism Secretariat wishes to express its gratitude to those who have contributed to the production of this *World Tourism Barometer*, in particular to institutions that supplied data, and to the members of the UN Tourism Panel of Experts for their valuable feedback and analysis.

This report was prepared by the Market Intelligence, Policies and Competitiveness Department under the supervision of Sandra Carvão, Director of the Department. Authors include (in alphabetical order): Fernando Alonso, Michel Julian and Javier Ruescas. Data was compiled from the [Tourism Market Intelligence Database](#) and the [Tourism Statistics Database](#) based on official country sources.

For more information including copies of previous issues, please visit: www.e-unwto.org/loi/wtobarometereng.

We welcome your comments and suggestions at: barom@untourism.int.

Data collection for this issue was completed on 20 May 2026, with **revisions** included on 20 July 2026.

The next issue of the World Tourism Barometer with more comprehensive results is scheduled to be published in September 2026.

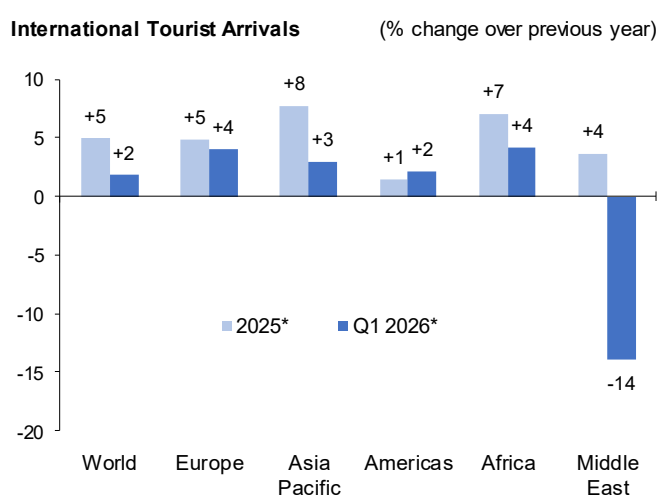
Pages 1 - 6 of this document constitute the Excerpt of the *World Tourism Barometer*. The full document is available free of charge for UN Tourism Members and subscribers from the UN Tourism Elibrary at www.e-unwto.org. This release is available in English, while the Statistical Annex is provided in English, French and Spanish.



Inbound tourism

International tourist arrivals grew 2% in January-March 2026

- International tourist arrivals (overnight visitors) increased by 2% in the first quarter of 2026, compared to the same period in 2025.
- An estimated 307 million tourists travelled internationally in Q1 2026, about 6 million more than in Q1 2025.
- While the start of the year saw sustained travel demand overall (+2.5% cumulative growth in January and February), the Middle East conflict impacted performance in March.
- International arrivals grew 2% in January and 3% in February, but were flat in March (+0.4%) partly due to a 37% decline in the Middle East, the region most impacted by the conflict, and slower than expected growth in Asia and the Pacific.
- Following the outbreak of the conflict on 28 February 2026, international tourism in the Middle East was impacted by airspace restrictions, operational disruptions and significant uncertainty.
- As a pivotal air travel corridor between Asia, Africa and Europe, the Middle East plays a critical role in global air connectivity, with disruptions affecting not only destinations in the Middle East, but international travel patterns more broadly.



Source: UN Tourism (May 2026)

* Provisional data

Europe and Africa saw the strongest performance in Q1 2026

- By region, Europe and Africa (both +4%) recorded the strongest performance in Q1 2026, compared to the first quarter of 2025, followed by Asia and the Pacific (+3%) and the Americas (+2%). The Middle East saw a decline of 14% in arrivals this first quarter.
- **Europe**, the world's largest destination region, saw over 130 million international tourists in Q1 2026, a 4% increase, building on the strong momentum of 2025 (+5%). Some European destinations benefited from the redirection of tourism flows in March. Southern Mediterranean Europe and Northern Europe both saw a 4% increase in arrivals in Q1 2026, while Central Eastern Europe (+6%) consolidated its rebound.
- Arrivals in **Africa** also grew 4% in Q1 2026, with both North Africa and Sub-Saharan Africa recording a 4% increase in arrivals this quarter. North Africa saw a strong 18% increase in March, with double-digit growth in Tunisia (+26%) and Morocco (+18%).
- In Sub-Saharan Africa, some destinations including South Africa (+12%) recorded double-digit growth this quarter. Others however, were affected by connectivity issues related to the Middle East conflict in March, particularly island destinations. Seychelles saw a 37% decline in March mostly due to reduced air capacity from Middle Eastern carriers. Mauritius recorded 7% growth in Q1 2026, though 1% in the month of March.
- **Asia and the Pacific** recorded 3% growth this first quarter, somewhat lower than expected due to mixed performance among destinations. A 2% decline in January was followed by a strong rebound in February (+9%) and then modest growth in March (+2%) due to a 27% decline in South Asia which suffered from the disruptions in Middle Eastern air hubs. Oceania (+9%) and North-East Asia (+5%) saw particularly robust results in Q1 2026. Arrivals in Asia remained 11% below pre-pandemic values (89% of Q1 2019 levels).
- The **Americas** recorded 2% more international arrivals in Q1 2026, with mixed results across subregions. North America, which accounts for over 60% of the region's arrivals, grew 2% this quarter, led by Mexico (+7%). Central America saw a strong 18% increase, compensating for weaker results in the Caribbean (+0.2%) and South America (-1%).

- In the **Middle East** international arrivals dropped 14% in Q1 2026, impacted by the conflict in the region. Several Gulf destinations recorded strong declines, while Egypt (+16%) saw a robust increase. This follows a strong rebound after the pandemic, with arrivals in 2025 climbing 40% above 2019 levels in the Middle East.
- Among destinations reporting growth in arrivals in the first three months of 2026, the best performers globally include: Paraguay (+46%), New Caledonia (+45%), El Salvador (+43%), Mongolia (+39%), Palau (+37%), Uzbekistan (+37%), Tonga (+25%), Anguilla (+25%), Ireland (+24%) and Brunei (+23%).
- In terms of receipts, several countries reported double-digit growth in Q1 2026, among which Pakistan (+60%), the Republic of Korea (+38%), Mongolia (+27%), Morocco (+24%), Brunei (+22%), Samoa (+14%), Brazil (+12%), Germany, Romania (both +9%) and Egypt (+8%).

Key travel industry indicators

- According to IATA, international air traffic grew 4% in Q1 2026, measured in revenue passenger-kilometres (RPKs), with positive performance across all regions, except the Middle East (-16%). Air traffic declined modestly in March (-1% RPKs), largely due to a major contraction among Middle Eastern carriers (-61%).
- African, Asia Pacific and European carriers recorded stronger growth, as passenger flows were diverted away from Middle Eastern hubs.
- International air capacity (measured in available seat-kilometres or ASKs) increased 2% in Q1 2026, with a contraction of 6% in March also largely due to a 57% drop in the Middle East, according to IATA.
- Global occupancy in accommodation establishments reached 64% in March 2026, matching the levels of March 2025. Europe, the Americas and Asia Pacific recorded the highest occupancy rates (all 65%), followed by Africa (56%) and the Middle East (48%) based on STR data.
- Hotel occupancy in the Middle East declined to 48% in March from 75% in January.

The Middle East crisis and rising travel costs among major concerns expressed by tourism experts

- According to the latest survey of the Panel of Tourism Experts, the Middle East conflict, high transport and accommodation costs as well as other economic factors are the three main challenges international tourism is facing in 2026.
- Almost two thirds of Panel Experts (64%) indicated that the Middle East conflict is negatively affecting demand for their destination, of which 43% consider the impact to be moderate and 21% high. Another 36% mentioned the conflict is having little or no impact on demand.
- Around 61% of experts said the Middle East conflict is reducing inbound tourism to their destination for various reasons. Some 25% mentioned travel costs, 19% traveler concerns and/or disruptions in air, road or maritime traffic; while 17% referred to lower air transport capacity.
- Conversely, 17% of experts expressed that their destination is witnessing an increase in inbound tourism because of disruptions in other destinations. Around 14% indicated an increase in domestic tourism at the expense of outbound tourism. Some 9% mentioned there is currently no drop in visitors but noticed a decline in bookings for the coming months.

Cautious optimism for upcoming Northern Hemisphere summer season

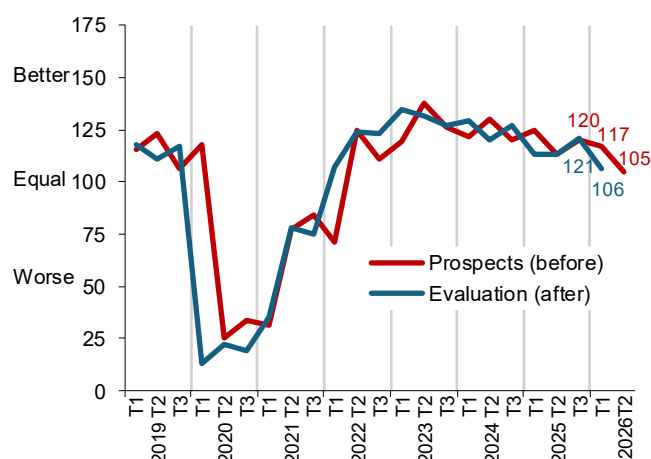
- The latest UN Tourism Confidence Index reflects cautiously positive prospects for the period May-August 2026, amid a challenging geopolitical environment. This period includes the summer season in the Northern Hemisphere.
- On a scale of 0 to 200 (where 100 indicates equal expected performance), experts gave prospects for May-August 2026 a score of 105, below the 117 score for January-April 2026 recorded in January this year. In terms of past performance, experts gave January-April a score of 106, well below their expectations (117) at the beginning of the year
- Around 39% of Panel experts indicated better (34%) or much better (5%) expected performance this 4-month period, while 28% foresee similar performance than in the same period of 2025. Some 31% expect tourism performance to be worse or much worse.

- Experts highlighted the uncertainty of the scope and duration of the conflict. Flight disruptions, the surge in oil prices and the potential shortage of jet fuel, are consequences of the conflict that could impact travel costs, overall inflation, bookings and travel sentiment.

The conflict in the Middle East could reduce growth in international arrivals in 2026

- The conflict is expected to reduce growth in international arrivals by 1 to 2 percentage points in 2026, below UN Tourism's initial forecast of 3% to 4%, depending on the conflict's duration and scope.
- Aside from disruptions in flights to, from and within the Middle East and effects on traveler confidence, the spike in oil prices and jet fuel shortage in some markets is increasing air fares and reducing flight capacity also in other regions.
- More expensive travel coupled with uncertainty about air connections could translate into a redirection of tourism flows towards closer destinations but could also affect overall demand.
- This happens in a context where global economic growth is projected to slow down due the effects of the conflict in the Middle East.
- According to IMF's latest World Economic Outlook (April 2026), the conflict in the Middle East threatens to disrupt growth and the recent trend of disinflation. Assuming that the conflict remains limited in duration and scope, global economic growth could slow to 3.1% in 2026 and 3.2% in 2027. Global headline inflation is projected to rise modestly in 2026, due to the rise in oil prices, before resuming its decline in 2027.
- In its WESP 2026 Mid-Year Update, the UN Department of Economic and Social Affairs (UNDESA) projects the global economy to grow 2.9% in 2026 (down from 3.1% expected in January), and 3.3% in 2027 (calculated using PPP weights, like IMF).

UN Tourism Confidence Index: World



Source: World Tourism Organization (UN Tourism)

- The disruption of shipping through the Strait of Hormuz has caused a surge in oil prices, particularly jet fuel oil prices, which remain highly volatile. This is leading to higher transport prices in a context of already elevated services inflation, including travel services, which is exerting pressure on demand.
- The uncertainty surrounding the crisis has shifted destination preferences and forced airlines to reroute or cancel thousands of flights. Against this backdrop, tourists are expected to continue to seek value for money but could also travel closer to home and domestically in response to elevated prices.
- In the Americas, Canada, the United States and Mexico could benefit from hosting the 2026 FIFA World Cup next June 11th to July 19th.

International Tourist Arrivals by (Sub)region

(Percent changes are year over year)

(Percent changes are year over year)												Monthly/ quarterly data				
	(millions)							Share (%)	Change (%)			Change (%)				
												2026 over 2025*				
	2019	2020	2021	2022	2023	2024	2025*	2025*	23/22	24/23	25/24*	YTD	Q1	Jan.	Feb.	Mar.
World	1,469	413	468	990	1,336	1,472	1,546	100	34.9	10.2	5.0	1.8	1.8	1.8	3.3	0.4
Advanced economies ¹	778	221	240	546	719	783	815	52.7	31.5	8.9	4.1	3.4	3.4	1.7	5.5	3.2
Emerging economies ¹	691	192	228	444	618	689	731	47.3	39.1	11.6	6.0	0.2	0.2	1.9	1.2	-2.6
By UN Tourism regions:																
Europe	746.0	246.4	309.7	625.0	729.3	772.1	809.6	52.4	16.7	5.9	4.9	4.0	4.0	4.5	3.5	3.9
Northern Europe	83.9	23.7	21.9	67.1	81.1	85.2	85.6	5.5	20.8	5.1	0.6	4.1	4.1	4.1	5.1	3.0
Western Europe	205.2	83.5	87.6	183.3	208.5	216.2	227.4	14.7	13.7	3.7	5.2	2.1	2.1	4.0	2.3	0.3
Central/Eastern Eur.	152.8	50.8	61.3	109.4	131.4	140.3	152.4	9.9	20.2	6.8	8.7	6.2	6.2	5.7	3.7	8.9
Southern/Medit. Eur.	304.2	88.4	138.9	265.3	308.3	330.5	344.1	22.3	16.2	7.2	4.1	4.3	4.3	4.3	4.0	4.6
- of which EU-27	541.1	188.8	229.8	467.3	541.4	569.1	598.5	38.7	15.9	5.1	5.2	3.1	3.1	3.6	3.0	2.8
Asia and the Pacific	362.7	58.9	26.7	93.4	248.9	312.7	336.5	21.8	166.6	25.6	7.6	2.9	2.9	-1.5	8.8	2.2
North-East Asia	170.3	20.3	10.9	20.5	105.4	138.8	158.9	10.3	414.1	31.7	14.5	4.7	4.7	-2.0	10.5	6.2
South-East Asia	138.6	25.5	3.3	42.3	98.6	122.7	125.2	8.1	133.0	24.4	2.1	1.1	1.1	-4.8	7.7	1.2
Oceania	17.5	3.6	0.9	6.8	12.9	14.4	15.4	1.0	91.0	11.4	6.8	9.2	9.2	1.8	16.7	9.1
South Asia	36.3	9.6	11.7	23.8	32.0	36.8	37.0	2.4	34.4	15.2	0.5	-1.3	-1.3	18.0	0.3	-26.8
Americas	219.2	69.5	81.5	157.1	200.0	216.6	219.7	14.2	27.3	8.3	1.4	2.1	2.1	1.0	2.3	3.2
North America	146.6	46.5	57.2	101.9	126.6	137.2	135.9	8.8	24.3	8.4	-1.0	2.0	2.0	1.3	2.3	2.5
Caribbean	26.0	10.1	14.2	23.6	28.1	29.9	30.1	1.9	19.4	6.4	0.4	0.2	0.2	1.7	-0.3	-0.7
Central America	10.9	3.1	4.7	9.3	11.5	12.9	13.7	0.9	24.5	11.8	6.1	18.0	18.0	15.2	20.5	18.5
South America	35.6	9.8	5.4	22.3	33.7	36.5	40.1	2.6	50.9	8.4	9.8	-0.8	-0.8	-3.8	-1.0	3.4
Africa	69.6	19.1	20.1	47.0	64.7	74.3	79.6	5.1	37.8	14.9	7.0	4.2	4.2	2.6	0.4	9.8
North Africa	25.6	5.6	6.6	19.3	27.9	31.9	35.3	2.3	44.9	14.5	10.5	3.8	3.8	-0.5	-4.5	17.8
Subsaharan Africa	44.0	13.5	13.5	27.7	36.8	42.4	44.3	2.9	32.9	15.2	4.4	4.5	4.5	5.0	5.1	3.3
Middle East	71.6	19.4	30.5	68.0	93.4	96.6	100.1	6.5	37.4	3.4	3.7	-13.9	-13.9	1.9	-9.8	-37.2
Memorandum ²																
ASEAN	138.6	25.5	3.3	42.3	98.6	122.6	125.1	8.1	133.0	24.4	2.1	1.1	1.1	-4.8	7.7	1.2
G20	1002	306	356	732	927	1008	1058	68.5	26.6	8.7	5.0	2.6	2.6	2.4	3.2	2.3
GCC	47.7	13.4	18.3	47.8	68.1	71.1	71.3	4.6	42.6	4.5	0.2	-19.2	-19.2	-1.2	-13.5	-47.6
LDCs	35.0	10.0	7.7	17.5	27.3	32.3	30.9	2.0	56.1	18.1	-4.1	-8.8	-8.8	-10.2	-9.0	-7.2
LLDCs	51.0	13.1	14.2	34.6	47.8	54.6	60.4	3.9	38.0	14.2	10.7	17.3	17.3	17.1	15.9	18.7
SIDS	40.0	9.6	11.4	25.6	35.7	39.0	38.8	2.5	39.1	9.4	-0.6	-1.9	-1.9	-3.7	0.2	-2.0

Source: World Tourism Organization (UN Tourism)

(UN Tourism, May 2026 - revised July 2026)

¹ Classification based on the International Monetary Fund (IMF).

* Provisional data

² ASEAN: Association of Southeast Asian Nations, G20: Group of Twenty, GCC: Gulf Cooperation Council, LDCs: Least Developed Countries, LLDCs: Landlocked Developing Countries, SIDS: Small Island Developing States.

See box in page 'A-2' for key to abbreviations and symbols.



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