



## International tourism up 2% in Q1 2026 amid growing uncertainty

**Madrid, Spain, 2 June 2026** - International tourist arrivals grew 2% over the first quarter of 2026, despite disruption caused by the crisis in the Middle East in March.

According to the latest data from UN Tourism, some 307 million tourists travelled internationally in the first quarter of 2026, about 6 million more than the same period of 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 (+0.4%).

The conflict is expected to reduce growth in international arrivals by 1 to 2 percentage points below UN Tourism's initial forecast of 3% to 4% for 2026, depending on the conflict's duration and scope. Aside from disruptions in flights to, from and within the Middle East and effects on traveller 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 connectivity, could redirect demand towards closer tourism destinations while also affecting overall travel demand.

UN Tourism Secretary-General Shaikha Al Nuwais said: “

“The ongoing conflict in the Middle East is disrupting travel patterns well beyond the region itself, including rising inflation, particularly in transport and accommodation. This is placing pressure on travellers, businesses and destinations alike. Even amid this uncertainty, international tourism continued to show resilience in the first quarter of 2026, with 307 million people travelling internationally, a 2% increase on last year. At a time of growing geopolitical and economic pressure, this reinforces tourism's wider role in supporting economies, creating opportunity and sustaining communities far beyond the sector itself.”

### By region: Europe and Africa see strongest performance in first quarter

The latest World Tourism Barometer by UN Tourism provides a regional breakdown of results for Q1:

- **Europe**, the world's largest travel destination region, saw over 130 million international tourists in Q1 2026, a 4% increase, building on the strong momentum of 2025 (+5%). Some destinations benefited from the redirection of tourism flows. Southern Mediterranean Europe and Northern Europe both saw a 4% increase in arrivals in Q1 2026, while Central Eastern Europe (+6%) continued its recovery.

- Arrivals in **Africa** (+4%) continued to grow in Q1 2026, with North Africa recording a 4% increase supported by strong double-digit figures in March (+18%). Arrivals in Sub-Saharan Africa also increased 4% in Q1.
- **Asia and the Pacific** recorded 3% growth this first quarter, somewhat slower than expected due to mixed performance among destinations. Strong results were recorded in February (+9%) but were more moderate in March (+2%), as disruptions affecting Middle Eastern air hubs contributed to a 27% decline in South Asia. Oceania (+9%) and North-East Asia (+5%) saw particularly robust results in Q1 2026. Overall, arrivals in Asia remained 11% below pre-pandemic values (89% of Q1 2019 levels).
- The **Americas** recorded 2% more international arrivals this first quarter of 2026, with strong growth in Central America (+18%) but weaker in South America (-1%).
- In the **Middle East** arrivals dropped 14% in Q1 2026, impacted by the conflict. Several Gulf destinations recorded strong declines this quarter, while Egypt (+16%) saw a robust increase in arrivals. This follows a strong rebound in the Middle East after the pandemic, with arrivals in 2025 climbing 40% above 2019 levels.

Among destinations reporting growth in arrivals for the first three months of 2026, the best performers include: Paraguay (+46%), New Caledonia (+45%), El Salvador (+43%), Mongolia (+39%), Palau (+37%) and Uzbekistan (+37%). In terms of receipts, several countries reported double-digit growth in Q1 2026, among which Pakistan (+60%), the Republic of Korea (+38%), Morocco (+24%), Brunei (+22%) and Brazil (+12%).

## Middle East crisis and rising travel costs: top concerns

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 affecting international tourism in 2026.

Almost two thirds of Panel Experts (64%) indicated that the Middle East conflict is negatively affecting travel demand for their destination, of which 43% consider the impact to be moderate and 21% high. Another 36% indicated 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. Conversely, 17% reported an increase in inbound tourism because of disruptions in other destinations. Around 14% of responses indicated an increase in domestic tourism, with domestic travel replacing some outbound tourism.

## Outlook: Cautious optimism for upcoming Northern Hemisphere summer season

The latest UN Tourism Confidence Index, which monitors sentiment by 300 tourism professionals around the world, reflects a cautiously positive outlook for 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 117 for the period January–April.
- Around 39% of Panel experts indicated better (34%) or much better (5%) expected performance this 4-month period, while 28% foresee similar performance to the same period of 2025. Some 31% expect tourism performance to be worse or much worse.
- Experts highlighted uncertainty around the scope and duration of the conflict. Flight disruptions and air capacity reductions were also mentioned, as well as the surge in oil prices and the potential shortage of jet fuel, with implications for travel costs, bookings and consumer confidence.
- 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 the context of already elevated services inflation, including tourism services, which is exerting pressure on travel demand.
- The uncertainty surrounding the crisis has shifted destination preferences, aside from forcing airlines to reroute or cancel thousands of flights.
- Against this backdrop, tourists are expected to continue to seek value for money but could also opt for destinations closer to home in response to elevated prices.
- In the Americas, Canada, the United States and Mexico could benefit from hosting the 2026 FIFA World Cup in June and July.

## 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%). International traffic declined modestly in March (-1% RPKs), largely due to a sharp contraction in air traffic among Middle Eastern carriers (-61%).
- African, Asia Pacific and European carriers recorded stronger growth, as passenger flows were diverted away from Middle Eastern hubs.
- According to IATA, 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.
- 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.
- Occupancy rates in the Middle East declined to 48% in March from 75% in January.

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