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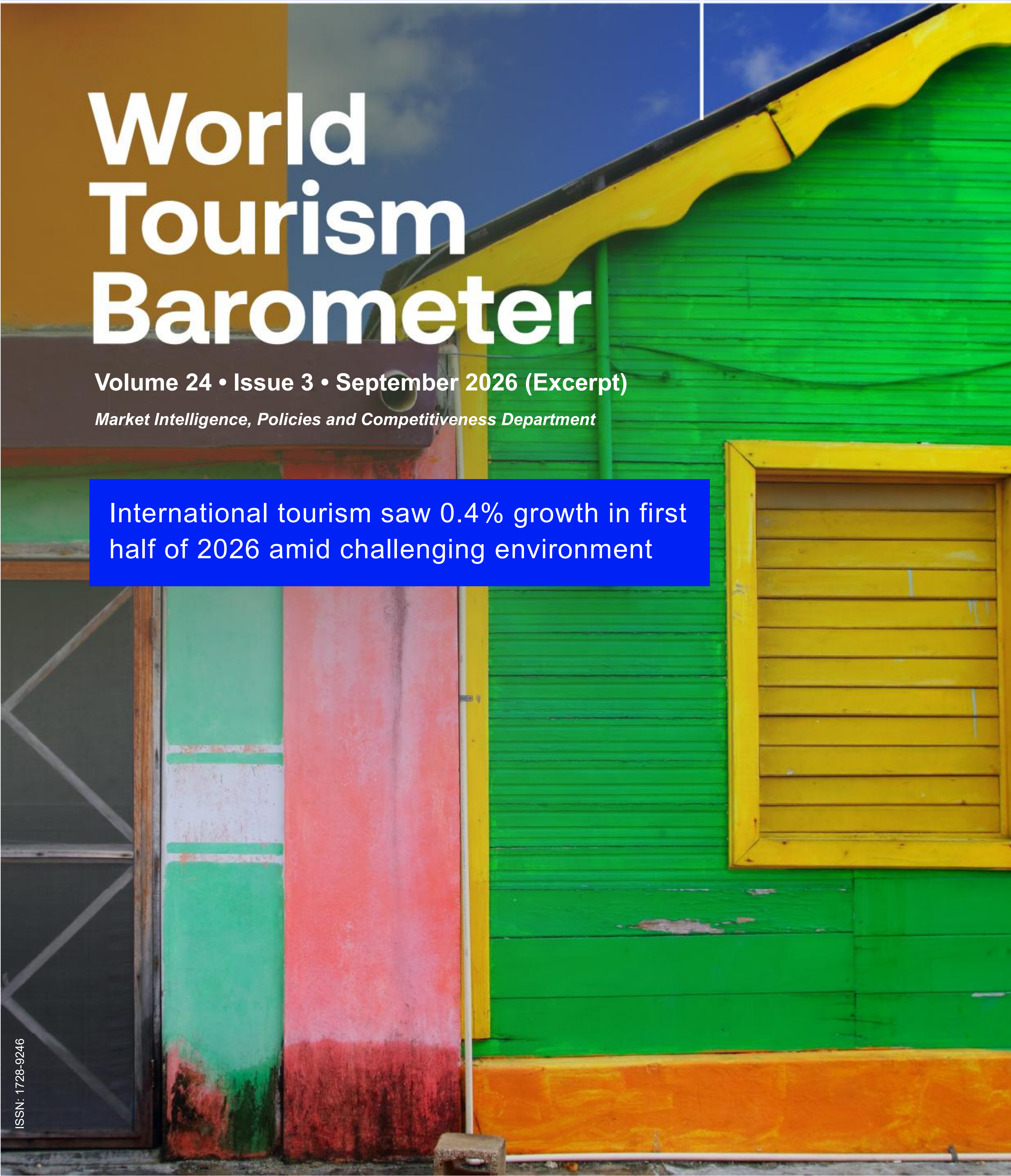

World Tourism Barometer

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Market Intelligence, Policies and Competitiveness Department

International tourism saw 0.4% growth in first half of 2026 amid challenging environment

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UN Tourism

The World Tourism Organization (UN Tourism) is the United Nations specialized agency mandated with the promotion of responsible, sustainable and universally accessible tourism. UN Tourism's membership includes 160 countries, 6 associate members, 2 permanent observers, and over 500 affiliate members representing the private sector, educational institutions, tourism associations and local tourism authorities.

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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 9 September 2026.

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

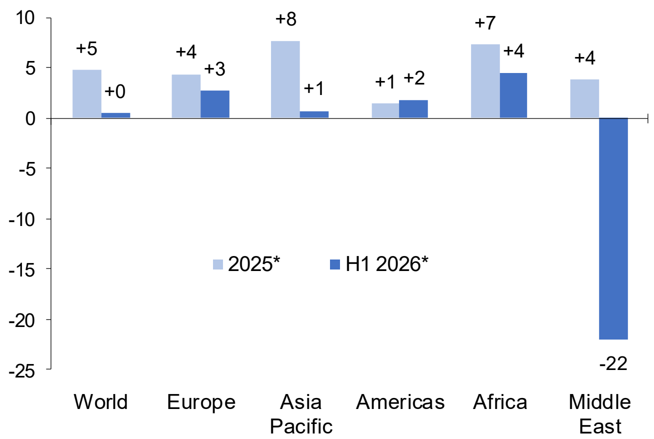
International tourism saw 0.4% growth in first half of 2026 amid challenging environment

- International tourism grew modestly in the first half (H1) of 2026, with global arrivals up 0.4% even as instability in the Middle East, elevated oil prices, and broader inflationary pressures tested the sector's resilience.

- An estimated 690 million tourists travelled internationally between January and June 2026, some 3 million more than the same period last year. While global arrivals increased by 2% in Q1 2026, they then slipped 1% in Q2, following a 3% decline in April due to the calendar effect of Easter starting in March this year and the wider consequences of the Middle East conflict.

- Arrivals also dropped 3% in June globally, following a 6% decline in Western Europe, affected by a heatwave in some destinations as well as fewer and more expensive flights from long haul markets. South-East Asia recorded 5% fewer arrivals in June because of weaker demand from Asian markets, geopolitical tensions, air travel disruptions through the Middle East and increased travel costs. Some destinations in Oceania (-6% in June) were also impacted by typhoon Sinlaku in Q2 2026.

International Tourist Arrivals (% change over previous year)



Source: UN Tourism (September 2026) * Provisional data

Africa and Europe recorded solid growth in H1 2026

- By region, Africa (+4%) and Europe (+3%) saw the strongest performance in H1 2026. International arrivals in the Americas grew 2% compared to the same period in 2025, while Asia and Pacific saw a 1% increase. In the Middle East, arrivals declined by 22% in this first half of the year impacted by the conflict in the region.

- **Europe**, the world's largest destination region, saw almost 350 million international tourists in H1 2026, a 3% year-on-year increase. Southern Mediterranean Europe recorded 4% growth, with some destinations benefiting from the redirection of travel flows from the Middle East.

- Central Eastern Europe (+4%) consolidated its rebound and reached pre-pandemic levels this period, while Northern Europe saw a 3% increase. By contrast, arrivals in Western Europe declined 1%, partly due to heatwaves in June and weaker long-haull demand in some destinations during Q2 2026.

- **Africa** (+4%) continued to see the strongest growth among world regions in H1 2026. Subsaharan Africa led results with a 6% increase in arrivals, while North Africa recorded 3% growth.

- South Africa (+12%) saw strong performance in H1 2026 within Sub-Saharan Africa, while some island destinations on the Indian Ocean were highly affected by reduced air capacity from Middle Eastern carriers. Mauritius recorded 1% growth in H1 2026, though arrivals dropped 4% in Q2. Seychelles saw 14% fewer visitors in the first half of 2026, with a sharp 20% decline in Q2. North Africa saw an estimated 3% increase in arrivals this first half of the year, with 6% growth in Morocco.

- The **Americas** recorded 2% more international arrivals in H1 2026, with mixed results across subregions. Central America (+15%) continued to enjoy double-digit growth, led by El Salvador (+37%). North America, which accounts for over 60% of the region's arrivals, grew 2% in the first half of 2026, with Mexico (+5%) and Canada (+4%) posting solid results.

- The Caribbean (0%) saw comparatively weaker results, despite double-digit growth in its largest destination, the Dominican Republic (+10%).
- Arrivals in South America decreased 2% in H1 2026, with mixed performance across the subregion's destinations. Paraguay saw a remarkable 34% increase in arrivals, while Bolivia (+10%), Argentina and Ecuador (both +8%) also posted strong results.
- Arrivals in **Asia and the Pacific** grew 1% in H1 2026, but remained 11% below 2019 levels, as disruptions to air connectivity, higher airfares and uncertainty affected intraregional demand.
- North-East Asia saw 3% growth in the first half of 2026, led by the Republic of Korea's remarkable performance (+21%), while South Asia (-5%) and South-East Asia (-1%) both recorded declines compared to January-June 2025. International arrivals in Oceania saw a 4% increase this period despite a 6% drop in June due to the impact of typhoon Sinlaku.
- In the **Middle East**, international arrivals dropped 22% in H1 2026, as the region was directly impacted by the conflict, including air traffic disruptions and lower traveler confidence. Several Gulf destinations saw strong declines this period, while Egypt recorded a 3% increase in the first half of 2026 despite a 7% drop in Q2. In Oman arrivals remained broadly stable compared to H1 2025.
- Despite impacting the Middle East and other regions since March 2026, air traffic disruptions caused by the conflict have gradually eased, especially after the ceasefire in May and early June, resulting in the reopening of some air routes and an uneven rebound in consumer sentiment.
- This decline in international tourism in the Middle East comes after strong results in 2023-2025, when the region enjoyed the fastest post-Covid19 recovery of all world regions. In 2025, the Middle East recorded 40% more international arrivals than in 2019.
- Some of the best-performing destinations reporting data for the first half of 2026 include: El Salvador (+37%), Paraguay (+34%), Bhutan (+31%), Vanuatu (+30%), Palau (+29%), Mongolia (+27%) and the Republic of Korea (+21%).
- In Europe, Uzbekistan and the Republic of Moldova both reported 25% growth in arrivals in H1 2026, while Greece and Ireland both saw a 15% increase.
- In terms of tourism receipts, several countries reported double-digit growth in H1 2026, among which Pakistan (+81%), Suriname (+78%), the Republic of Korea (+36%), Laos (+32%) and Malaysia (+23%). In Africa, Mozambique (+22%), Mauritius (+18%) and Morocco (+16%) posted a strong increase in earnings, as did Gambia (+12%). In Europe, Greece and Ireland both recorded 15% growth, while in the Americas, Brazil saw a 12% increase.

International air traffic in line with growth in arrivals

- According to IATA, international air traffic grew 0.4% in the first half of 2026, measured in revenue passenger-kilometres (RPKs) the same increase as in international arrivals. All regions recorded solid growth in air traffic except the Middle East (-29%).
- Latin American and Caribbean (+10%) and African (+9%) carriers recorded the strongest growth in the first six months of the year.
- International air capacity (measured in available seat-kilometres or ASKs) declined slightly in H1 2026 (-0.6%), largely due to a 20% drop in the Middle East. Air passenger traffic on Middle Eastern carriers contracted by 14% in June 2026, an improvement from May (-29%). North American airlines also saw a small decline this period.
- Global occupancy in accommodation establishments reached 68% in June 2026, almost matching levels of 2025 (69%). Europe (77%), the Americas (68%) and Asia Pacific (63%) recorded the highest occupancy, followed by Africa (58%) and the Middle East (53%), based on CoStar data.
- Hotel occupancy in the Middle East (53%) improved from the lows of March and April (48 and 49%) but remains below 2025 levels (60% in June 2025).

Economic factors and rising travel costs among major concerns expressed by tourism experts

- According to the latest survey of the Panel of Tourism Experts, economic factors such as volatile oil prices, inflation or weak output, as well as high transport and accommodation costs are the two main challenges international tourism is facing in 2026.
- Crude oil prices have seen considerable volatility since March 2026, with WTI oil surging 68% from USD 67 per barrel on 27 February 2026, to a maximum of USD 113 on 7 April, due to concerns over production and

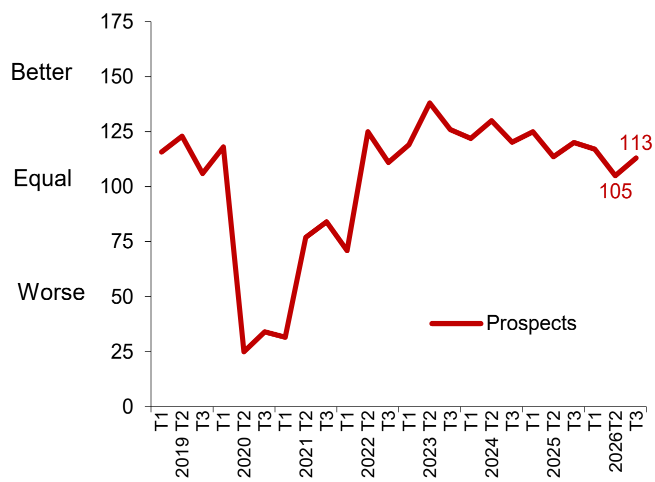
distribution, mainly through the Strait of Hormuz. WTI oil then dropped below USD 70 a barrel in late June 2026 after the peace talks, but rebounded with the renewed tensions, hovering around USD 80 to 90 per barrel in July.

- The Middle East conflict ranked third among concerns identified by tourism experts in the current September 2026 survey, down from the top concern in the past May 2026 survey.
- Around 53% of experts said the Middle East conflict is negatively affecting demand for their destination (down from 64% in May), of which 39% consider the impact to be moderate and 14% high. The remaining 47% mentioned that the conflict is having little or no impact on demand (up from 36% in September).

Cautious optimism for September-December 2026

- The latest UN Tourism Confidence Index continues to reflect cautiously positive prospects for the period September-December 2026, amid a volatile geopolitical and economic situation.
- On a scale of 0 to 200 (where 100 indicates equal expected performance), experts gave September-December 2026 a score of 113, above the prospects score for May-August 2026 (105) recorded earlier this year. In terms of past performance, experts gave May-August a score of 112, well above their expectations (106) in early May, due to the improvement of the Middle East conflict after the May ceasefire.

UN Tourism Confidence Index: World



Source: World Tourism Organization (UN Tourism)

T1: January-April; T2: May-August; T3: September-December

- Some 45% of Panel experts indicated better (41%) or much better (4%) expected performance in September-December 2026, while 34% foresee similar performance than in the same period of 2025. Some 21% expect tourism performance to be worse or much worse.
- In view of the latest data and current geopolitical volatility, including the Middle East conflict, international tourist arrivals are now expected to grow between 1% and 2% in 2026, as compared to UN Tourism's January forecast of 3% to 4%. This will depend on the conflict's actual duration and its effect on oil prices and overall inflation.
- Outside the region, disruptions and uncertainty are having an uneven impact on destinations. In parts of Europe and Asia Pacific, the conflict has partly shifted tourism demand toward nearby and more accessible destinations.
- International travellers will continue to seek value for money and travel closer to home or domestically in response to elevated prices and uncertainty.

International Tourist Arrivals by (Sub)region

(Percent changes are year over year)									Annual	Monthly/ quarterly								
								Share	Change	Change (%)								
	(millions)							(%)	(%)	2026 over 2025*								
	2019	2020	2021	2022	2023	2024	2025*	2025*	25/24*	YTD	Q1	Q2	Jan.	Feb.	Mar.	Apr.	May	Jun.
World	**1,479**	**413**	**468**	**991**	**1,339**	**1,474**	**1,544**	**100**	**4.7**	**0.4**	**2.0**	**-0.8**	**1.6**	**3.8**	**0.7**	**-2.7**	**2.9**	**-2.6**
Advanced economies[1]	*778*	*221*	*240*	*547*	*719*	*783*	*816*	*52.8*	*4.1*	*2.4*	*3.6*	*1.5*	*1.7*	*6.1*	*3.1*	*0.5*	*5.2*	*-0.9*
Emerging economies[1]	*702*	*192*	*228*	*444*	*620*	*691*	*728*	*47.2*	*5.4*	*-1.7*	*0.5*	*-3.8*	*1.6*	*1.7*	*-1.9*	*-6.5*	*-0.1*	*-4.7*
By UN Tourism regions:																		
Europe	***756.2***	***246.4***	***309.7***	***625.2***	***728.0***	***774.5***	***808.3***	***52.4***	***4.4***	***2.7***	***4.1***	***1.8***	***4.8***	***4.7***	***2.9***	***0.8***	***6.1***	***-1.0***
Northern Europe	83.9	23.7	21.9	67.1	81.1	85.2	86.1	5.6	1.1	3.0	4.8	1.9	4.2	5.6	4.5	0.5	4.3	0.9
Western Europe	205.2	83.5	87.6	183.3	208.7	216.4	227.6	14.7	5.2	-0.5	1.5	-1.8	4.1	2.5	-1.7	-3.7	5.5	-6.2
Central/Eastern Eur.	163.0	50.8	61.3	109.4	129.7	142.2	149.9	9.7	5.5	4.3	5.9	3.3	7.1	4.8	5.6	2.2	5.1	2.5
Southern/Medit. Eur.	304.2	88.4	138.9	265.5	308.6	330.8	344.6	22.3	4.2	4.1	5.0	3.6	4.2	6.1	4.7	3.3	7.2	0.8
- of which EU-27	*551.2*	*188.8*	*229.8*	*467.3*	*539.9*	*569.1*	*598.8*	*38.8*	*5.2*	*3.0*	*3.8*	*2.5*	*4.5*	*5.1*	*2.1*	*1.9*	*7.4*	*-1.2*
Asia and the Pacific	***362.7***	***58.9***	***26.7***	***93.4***	***252.5***	***312.7***	***336.6***	***21.8***	***7.6***	***0.7***	***2.5***	***-1.2***	***-2.5***	***8.5***	***2.3***	***-1.7***	***-0.3***	***-1.6***
North-East Asia	170.3	20.3	10.9	20.5	109.0	138.8	158.9	10.3	14.5	2.9	4.8	1.2	-1.5	10.3	6.2	1.9	1.4	0.2
South-East Asia	138.6	25.5	3.3	42.3	98.6	122.7	125.4	8.1	2.2	-1.0	0.2	-2.3	-4.9	6.2	0.1	-0.9	-1.5	-4.7
Oceania	17.5	3.6	0.9	6.8	12.9	14.4	15.4	1.0	6.8	4.1	9.3	-2.2	1.9	16.8	9.2	0.1	-1.1	-5.9
South Asia	36.3	9.6	11.7	23.8	32.0	36.8	37.0	2.4	0.4	-4.7	-0.8	-9.9	1.4	6.7	-12.2	-26.1	-4.7	4.9
Americas	***219.2***	***69.5***	***81.5***	***157.1***	***200.0***	***216.3***	***219.3***	***14.2***	***1.4***	***1.8***	***2.8***	***0.8***	***1.2***	***2.4***	***4.8***	***-1.6***	***3.2***	***0.8***
North America	146.6	46.5	57.2	101.9	126.6	137.2	135.9	8.8	-1.0	2.0	2.6	1.4	1.3	2.3	4.3	-2.1	4.1	2.3
Caribbean	26.0	10.1	14.2	23.6	28.1	29.6	30.1	2.0	1.6	-0.1	1.1	-1.4	3.2	0.0	0.2	-1.7	-0.2	-2.1
Central America	10.9	3.1	4.7	9.3	11.5	12.9	13.7	0.9	6.1	15.3	19.3	10.8	15.0	21.1	22.0	12.9	14.4	5.4
South America	35.6	9.8	5.4	22.3	33.7	36.5	39.6	2.6	8.4	-2.0	-0.6	-4.3	-3.6	-1.0	4.1	-5.4	-1.9	-5.4
Africa	***69.6***	***19.1***	***20.1***	***47.0***	***64.7***	***74.2***	***79.6***	***5.2***	***7.2***	***4.4***	***5.9***	***3.2***	***4.4***	***2.1***	***11.4***	***3.4***	***5.4***	***0.9***
North Africa	25.6	5.6	6.6	19.3	27.9	31.9	35.3	2.3	10.5	3.3	3.9	2.9	-0.5	-4.5	18.0	1.6	6.8	0.5
Subsaharan Africa	44.0	13.5	13.5	27.7	36.8	42.3	44.3	2.9	4.8	5.5	7.5	3.5	8.2	8.3	6.0	5.2	3.9	1.4
Middle East	***71.6***	***19.4***	***30.5***	***68.0***	***93.4***	***96.6***	***100.2***	***6.5***	***3.8***	***-22.0***	***-13.3***	***-32.8***	***0.4***	***-10.0***	***-32.5***	***-41.9***	***-22.2***	***-32.6***
Memorandum[2]																		
ASEAN	138.6	25.5	3.3	42.3	98.6	122.7	125.4	8.1	2.2	-1.0	0.2	-2.3	-4.9	6.2	0.1	-0.9	-1.5	-4.7
G20	1012	306	356	732	929	1008	1059	68.6	5.1	2.0	3.2	1.2	2.8	4.5	2.4	-0.3	5.5	-1.4
GCC	47.7	13.4	18.3	47.8	68.1	71.1	71.3	4.6	0.2	-28.8	-19.3	-42.6	-3.3	-13.7	-44.2	-52.9	-29.8	-42.6
LDCs	35.0	10.0	7.7	17.5	27.3	32.3	30.9	2.0	-4.1	-13.1	-12.6	-13.7	-10.5	-16.0	-11.2	-15.0	-14.3	-11.5
LLDCs	51.0	13.1	14.2	34.6	47.8	56.6	60.4	3.9	6.8	9.0	13.5	5.5	14.1	12.3	14.0	5.5	6.8	4.0
SIDS	40.0	9.6	11.4	25.6	35.7	39.0	38.8	2.5	-0.6	-4.4	-1.1	-8.1	-3.1	0.8	-0.7	-9.7	-7.0	-7.4

Source: World Tourism Organization (UN Tourism) (Data as collected by UN Tourism, September 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.

UN Tourism

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