



2026 TRANSFER & EXCURSION OPERATIONS BENCHMARK

North American transfer and excursion operations enter 2026 with strong demand but continued labor, infrastructure, and cost constraints. The experiences sector has largely recovered, shifting from rebound-driven growth to a more stable market.

By the drvn research team.



North American transfer and excursion operations enter 2026 in a mature recovery phase: demand is strong, but service delivery is constrained by labor, infrastructure, and persistent price inflation.

Experiences

(tours/activities/attractions) have largely regained pre-pandemic scale, with industry research estimating the experiences sector at \$253B in 2019 and reporting recovery to 93% of 2019 bookings by 2023 (with continued growth expected thereafter). At the same time, operator benchmarking indicates that 2024 in-destination revenue was poised to slightly exceed 2019 (101%) even as bookings remained below 2019 (about 89%), consistent with inflation-driven revenue recovery and a cooling from the earlier “revenge travel” surge.

Corporate travel spending, a primary driver of airport transfers and event mobility, has also re-accelerated.

The World Travel & Tourism Council (WTTC) projected global business travel spending of \$1.5T in 2024, 6.2% above 2019, after business travel remained 5.4% below 2019 in 2023 (with leisure 2.9% below 2019 in 2023). For travel managers and event planners in 2026, success depends less on minimizing cost and more on securing reliable, scalable transportation and experiences in a capacity-constrained market where delays are poorly tolerated.

OF 32,000 84% THINK TRAVELING MORE SUSTAINABLY IS IMPORTANT

Sustainability expectations are also rising: 2025 research says that of (32,000 travelers in 34 countries) 84% think traveling more sustainably is important, and 93% say they want to make more sustainable choices (and to some extent have done so). The strategic implication is straightforward: sourcing should reward reliability and resilience (capacity assurance, real-time communication, contingency plans), not just price. Suppliers that invest in staffing stability, technology-enabled dispatch/booking, and lower-emission operations are better positioned for 2026–2028 than operators attempting to “wait out” the new baseline. (Operational best-practice implication drawn from the capacity and demand dynamics described in the cited industry benchmarks.)

Segment-Level Performance Analysis

Recovery has been uneven across segments, with leisure experiences leading and business/event mobility accelerating later.

Experiences demand recovered early and broadly; industry sizing work reports experiences bookings recovering to 93% of 2019 by 2023. Operator benchmarking further suggests revenue normalization (and in some cases revenue exceeding 2019) despite bookings still below 2019, reinforcing the role of price and mix in post-pandemic recovery. Corporate travel recovered more slowly but is now a meaningful growth engine for airport transfers and event shuttles. WTTC's projection of \$1.5T in global business travel spending in 2024 (above 2019) aligns with sustained tailwinds for managed transfers and group movements tied to meetings and events. Business travel's mix has also shifted: Navan reports office visits rising from 28% of business travel in 2019 to 33% in 2024, and conference travel rising from 12% to 15% over the same period. Excursion demand is also being shaped by the "blended trip." Navan reports bleisure bookings in 2024 were nearly 4x higher year-over-year, a pattern that matters to procurement because the same traveler may require a corporate-compliant airport transfer plus leisure excursions during an extended stay.

Primary Demand Drivers

Three drivers dominate 2026 procurement realities: purpose, convenience, and price pressure. First, travel purpose is increasingly experience- and connection-oriented, reinforced by the rebound in experiences bookings and the shift toward office visits and conferences within corporate travel. Second, convenience is pushing demand toward pre-booked, tech-mediated services. The Business Research Company estimates the pre-book airport transfer market will grow from \$8.77B (2024) to \$10.11B (2025) at a 15.3% CAGR, supporting the view that buyers increasingly lock in transportation rather than rely on curbside availability or surge pricing.

Third, demand is constrained and reshaped by price pressure. Corporate travel cost benchmarks reported by Navan indicate that since 2019, base flight prices rose 18%, taxes and fees rose 25%, and total cost per mile rose 20%, increasing the value of predictable, policy-driven booking and preferred-supplier programs.

Downstream or Adjacent Industry Impacts

Transfers and excursions have direct spillovers into hospitality, venues, and local infrastructure. Hotels benefit from sustained travel demand but also become bottlenecks when staffing is thin. AHLA's 2024 State of the Hotel Industry projects U.S. hotel occupancy at 63.6% in 2024 versus 65.8% in 2019, and 2024 ADR at \$160.16 (reported as 21.8% above 2019 ADR).

AHLA also reports that in January 2024, 67.6% of surveyed hoteliers experienced staffing shortages, which can translate into operational friction that makes smooth arrival/departure transport more important to overall guest satisfaction. Airports and city curbside systems are also under pressure as passenger volumes rise. Airports Council International (ACI World) projects 9.8 billion global passengers in 2025, up 3.7% year-over-year from 2024, implying continued volume-driven pressure on transfer operations at major gateways. For destinations, excursions drive local spend, but over tourism concerns are rising. A report states reports 53% of travelers are now conscious of tourism's impact on local communities (not just the environment), and only 16% favor capping visitor numbers, preferring instead infrastructure investment such as improved transportation.

53% OF TRAVELERS ARE NOW CONSCIOUS OF TOURISM'S IMPACT ON LOCAL COMMUNITIES

Infrastructure, Capacity, and Cost Dynamics

Capacity constraints in 2026 are primarily human and operational rather than demand-limited. AHLA's finding that 67.6% of surveyed hoteliers reported staffing shortages (Jan 2024) provides a concrete benchmark for the labor tightness that also affects transfers and guided experiences during peaks. Vehicle and fleet economics remain a pressure point. While pricing varies significantly by market and timing, A study characterizes rental car pricing as highly variable across major U.S. airport markets, useful as a proxy indicator of continued volatility in ground-fleet economics (acquisition, utilization, and operational costs).

Digital distribution is now structural, not optional. Arival reports mobile bookings represent nearly 40% (two in five) of direct online bookings for tour and activity operators, and more than half (52%) of attraction website bookings, up from 37% in 2019, meaning mobile UX and real-time updates are increasingly tied to conversion and service management.

Overlooked Insights & Emerging Trends

A key overlooked insight is that the post-pandemic demand surge has cooled into a more normalized environment where service quality and operating discipline reassert as key differentiators. Operator benchmarking explicitly describes slower growth in 2024 relative to the “revenge travel” years, which raises the relative value of reliability, recovery capability, and communication over purely price-led selling. A second trend is hybridization across mobility and traveler identity.

Navan reports rail bookings rising from 1% of total bookings in 2019 to 6% in 2024 (in the contexts it measures), reflecting sustainability and practicality drivers even if North America’s rail baseline differs from Europe’s. Navan Policy pressure is also real in some markets: Euronews describes France’s short-haul flight restrictions where rail alternatives under 2.5 hours exist, illustrating the type of regulatory action that can shift mode choice and increase demand for coordinated ground connections.

Structural Changes

Several structural shifts appear durable through 2026–2030. First, mobile-first commerce has become standard in experiences, with Arival’s mobile booking shares (40%+ in multiple operator contexts) reinforcing that digital optimization now influences both demand capture and service recovery communications.

Second, hybridization in meetings remains part of the event toolkit. Bizzabo reports that looking ahead to 2023, 85% of event organizers planned to host at least three in-person events, and separate reporting on the same dataset notes 68% planned a virtual component for their next in-person event, supporting the view that event formats remain mixed and that transfer planning must flex to variable attendance patterns.

Third, sustainability expectations are embedded in buyer expectations. A report states 73% of travelers want the money they spend to go back to the local community and 69% want to leave places better than when they arrived, making community benefit and responsible operations increasingly material to program design and supplier selection.

Risk Factors

The leading risks to transfer and excursion operations in 2026 cluster into macroeconomic, operational, and reputational categories. Operational risk is tied to capacity fragility: high demand plus staffing tightness (as evidenced in U.S. hospitality staffing survey results) increases the probability of service failures during peak windows, late pickups, no-shows, and cascading schedule slips. Aviation system volume growth (projected passenger increases) can amplify curbside congestion and irregular operations that propagate directly into transfer volatility.

Reputational risk is magnified by review culture and the permanent digital shift in booking behavior; as mobile booking becomes mainstream, the pathway from service failure to rapid negative feedback and reduced conversion compresses. Sustainable-tourism sentiment also raises reputational exposure because travelers increasingly frame sustainability as both environmental and community impact.

Sustainability & Responsibility Considerations

In 2026, sustainability extends beyond emissions to include community impact and responsible governance.

From an infrastructure standpoint, the availability of services like airport meet-and-greet, dedicated pick-up zones, and fast-track access for vetted corporate drivers has improved the speed and quality of ground transfers at major hubs. Many airports and cities have introduced or expanded dedicated ride-share and limo lanes to ease congestion, recognizing the growing volume of professional car services. Moreover, corporate travel management platforms have integrated ground transportation options more seamlessly, so event managers and executive assistants can book cars, shuttles, or transfers in the same systems they use for flights and hotels. This integration means better tracking and coordination, for example, a delayed flight automatically alerting the ground provider, which enhances overall service reliability. The net effect is a more resilient ground transport network: one that has learned from the disruption and put systems in place to mitigate future shocks. Travel programs in 2026 can expect that even if isolated issues occur (weather events, sudden driver illness, etc.), the broader system has operational backups and contingency plans to maintain continuity. This increased resiliency is a hallmark of the industry's recovery, translating into shorter service recovery times and fewer cancellations noted earlier.

Research indicates sustainability intent is now mainstream (84% say it matters; 93% say they want to make more sustainable choices), and that community impact has moved into the center of traveler expectations (53% conscious of tourism's impact on communities).

For transfer operations, predictable dispatching is increasingly aligned with electrification and efficiency initiatives (operational implication consistent with the rapid growth in pre-book transfers and the shift toward planned mobility). For excursions, responsibility includes visitor-flow management and tangible local benefit; Research is finding that travelers prefer infrastructure investment over caps reinforces that destinations may prioritize systems that reduce friction while distributing benefits and loads more effectively.

Future Outlook and Forecast

The medium-term outlook for transfers and excursions is positive, with growth continuing under normalized conditions rather than rebound surges.

ACI's forecast of 9.8B global passengers in 2025 (+3.7% YoY) supports a continued baseline demand environment for airport transfers and destination mobility. Experiences are expected to remain a major travel spending category, consistent with the post-2019 recovery trajectory reported for tours/activities/attractions.

Pre-booked airport transfers, specifically, are forecast for sustained high growth: The Business Research Company projects expansion from \$8.77B (2024) to \$10.11B (2025) at 15.3% CAGR, pointing to a durable shift toward contracted, planned mobility. The main sensitivities remain economic slowdown, geopolitical shocks, and climate-related disruption (risk framing supported by the volume and recovery context reflected in industry outlook sources).

Strategic Implications

For travel and event buyers, 2026 procurement should emphasize capacity certainty and measurable performance. Contracting should prioritize vendors able to guarantee fulfillment under peak demand and provide real-time tracking/communication, and should treat mobile-first communications as a core service requirement given mobile's share of bookings in experiences.

Budgeting should assume elevated prices remain sticky across the travel stack, consistent with higher corporate travel cost indices (air travel components up materially vs 2019) and hospitality pricing signals (ADR well above 2019).

For suppliers, the strategic priority is reliability at scale. Investment in staffing stability (in a labor-constrained environment visible across hospitality) and in dispatch/booking systems aligns with both traveler expectations and the market shift toward pre-booked transfers. Sustainability capability, emissions transparency, community impact practices, should be treated as a product attribute rather than marketing, given traveler expectations and the demonstrated shift toward community-aware tourism.

For destinations and venues, the implication is that mobility and experiences require integrated planning. Data is showing low support for caps and higher support for infrastructure investment suggests the long-run path is to improve transportation and visitor systems rather than rely solely on restriction-based approaches.

Conclusion

North American transfer and excursion operations in 2026 sit in a high-demand, high-constraint equilibrium. Demand has recovered and is structurally supported by the rebound in experiences bookings and record-level business travel spending projections. At the same time, capacity and inflation dynamics mean reliability is harder, and more valuable, than in the pre-pandemic era, particularly as passenger volumes remain high and booking behavior is increasingly mobile-first. The operational leaders in this market will be those who deliver consistent service under peak stress, communicate transparently, and align with sustainability and community expectations that have become mainstream among travelers.

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