

# 2026

## ABA Marketplace: The Business Engine of Bus and Group Travel

*2026 Business Impact Report*

Conducted by:



Prepared for:





# SUMMARY OF FINDINGS

- **Introduction**  
Project Background
- **Key Findings**  
Summary impacts
- **Business Booked at Marketplace**  
Sales directly booked during the ABA Marketplace event
- **Anticipated Future Business**  
Additional sales expected to occur after Marketplace meetings and connections
- **Total Transaction Volume**  
Combined value of booked and anticipated business
- **Supplemental Analysis: Buyer-Reported Activity**  
Supplementary insight into buyer purchasing activity and engagement
- **Implications and Marketplace Value**  
Overall business significance of ABA Marketplace
- **Appendix: Survey Overview and Methodology**  
Description of survey instrument and analytical approach

# Introduction

## About ABA Marketplace

ABA Marketplace is the premier annual business development event for the motorcoach and group travel industry and the place where business gets done. Bringing together tour operators, destinations, attractions, lodging providers, and travel partners from across North America, Marketplace functions as the business engine of bus and group travel, connecting the companies that design tours with the destinations and suppliers that deliver them.

Unlike traditional conferences that focus primarily on education or networking, Marketplace is built around a structured, appointment-based format that enables buyers and sellers to conduct focused one on one meetings. Over several days, participants hold thousands of scheduled business appointments, allowing them to develop new tour programs, build partnerships, and negotiate future business.

Through this format, Marketplace serves as the industry's central platform for business development. Relationships formed during the event frequently translate into tour itineraries, destination partnerships, and supplier agreements that continue generating economic activity long after the event concludes.

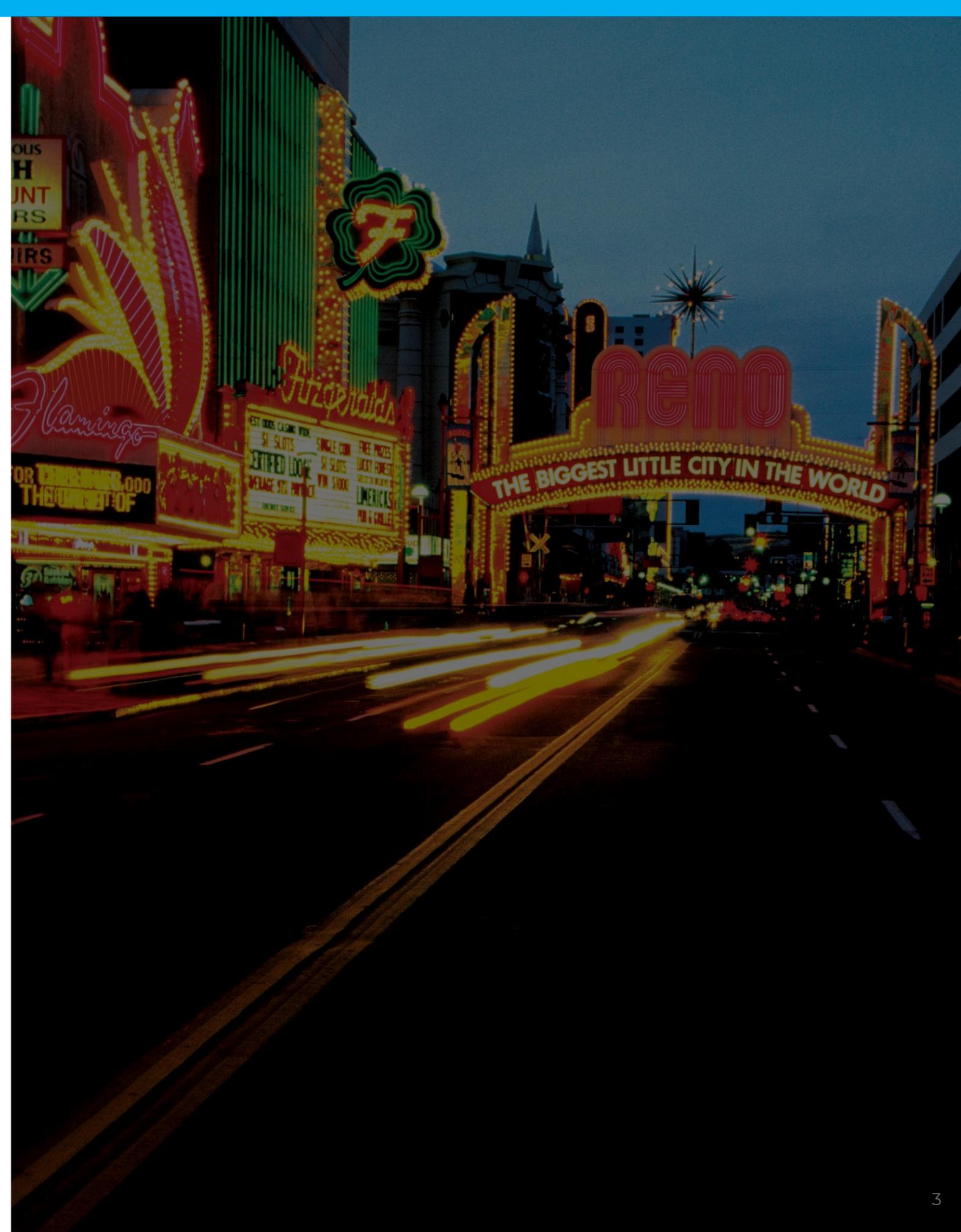
## Purpose of This Study

To independently assess the business value generated through Marketplace, ABA commissioned Tourism Economics to conduct a post-event impact analysis. The study evaluates the volume of business transacted at the event and the pipeline of future activity resulting from Marketplace participation.

This report quantifies:

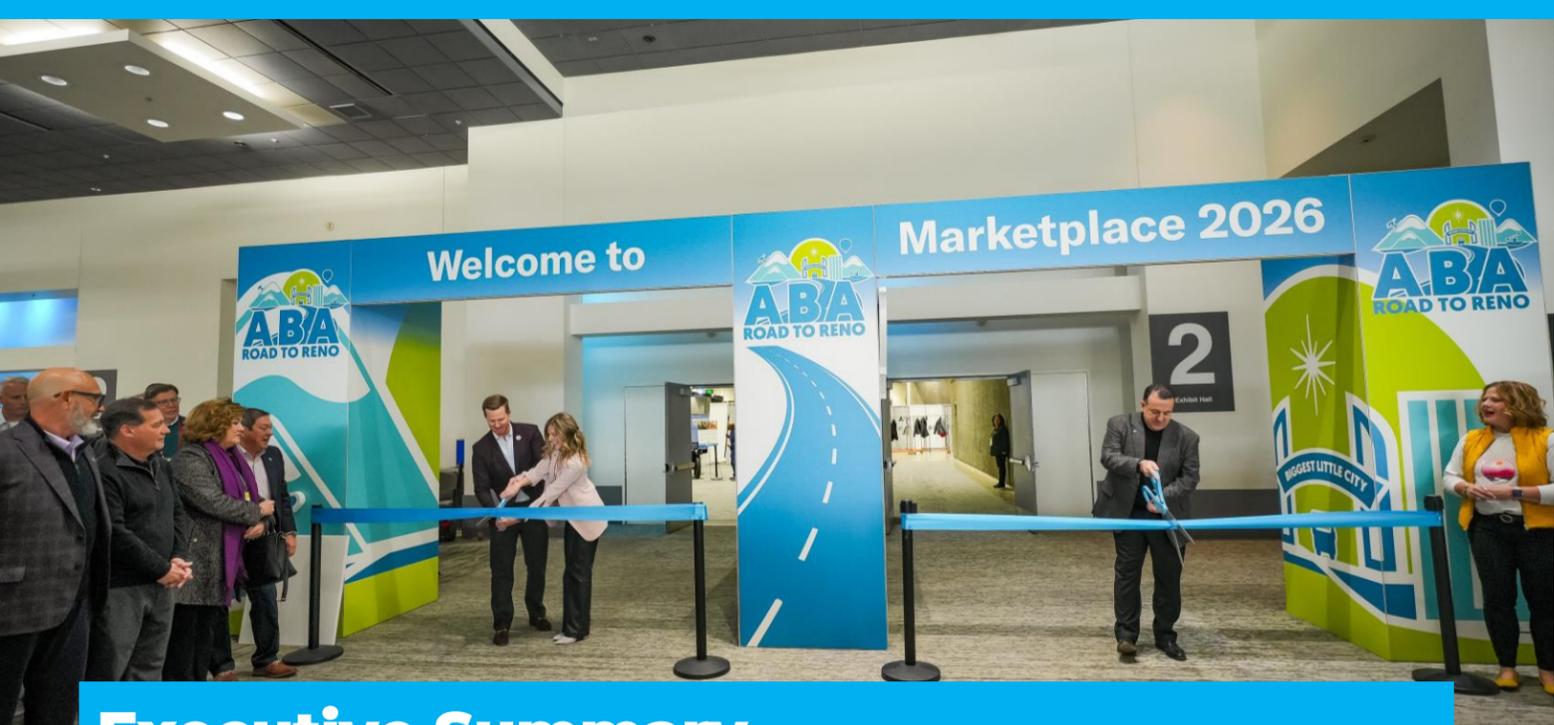
- Business booked directly at Marketplace
- Anticipated future business resulting from Marketplace connections
- Total transaction volume generated across participating firms

Survey findings are extended across the full attendee base to estimate total Marketplace-driven business activity.



# KEY FINDINGS





## Executive Summary

ABA Marketplace continues to deliver substantial, measurable business value for participating firms across the motorcoach and group travel industry. An independent post-event analysis conducted by Tourism Economics estimates that the event generated \$124.9 million in direct transaction volume (sales-based), including both business booked onsite and anticipated future sales resulting from Marketplace appointments.

### Confirmed Business Activity

Participating firms reported:

- \$49.0 million in business booked directly at Marketplace
- Significant activity across all entity types, with Attractions and Motorcoach Operators generating the largest extended totals

This represents immediate, realized economic impact attributable to the event.

### Future Business Pipeline

In addition to confirmed transactions, firms anticipate:

- \$75.9 million in future business tied to Marketplace meetings

This forward-looking activity reflects the long-term value of appointment-based engagement and relationship development.

### Total Marketplace Transaction Volume

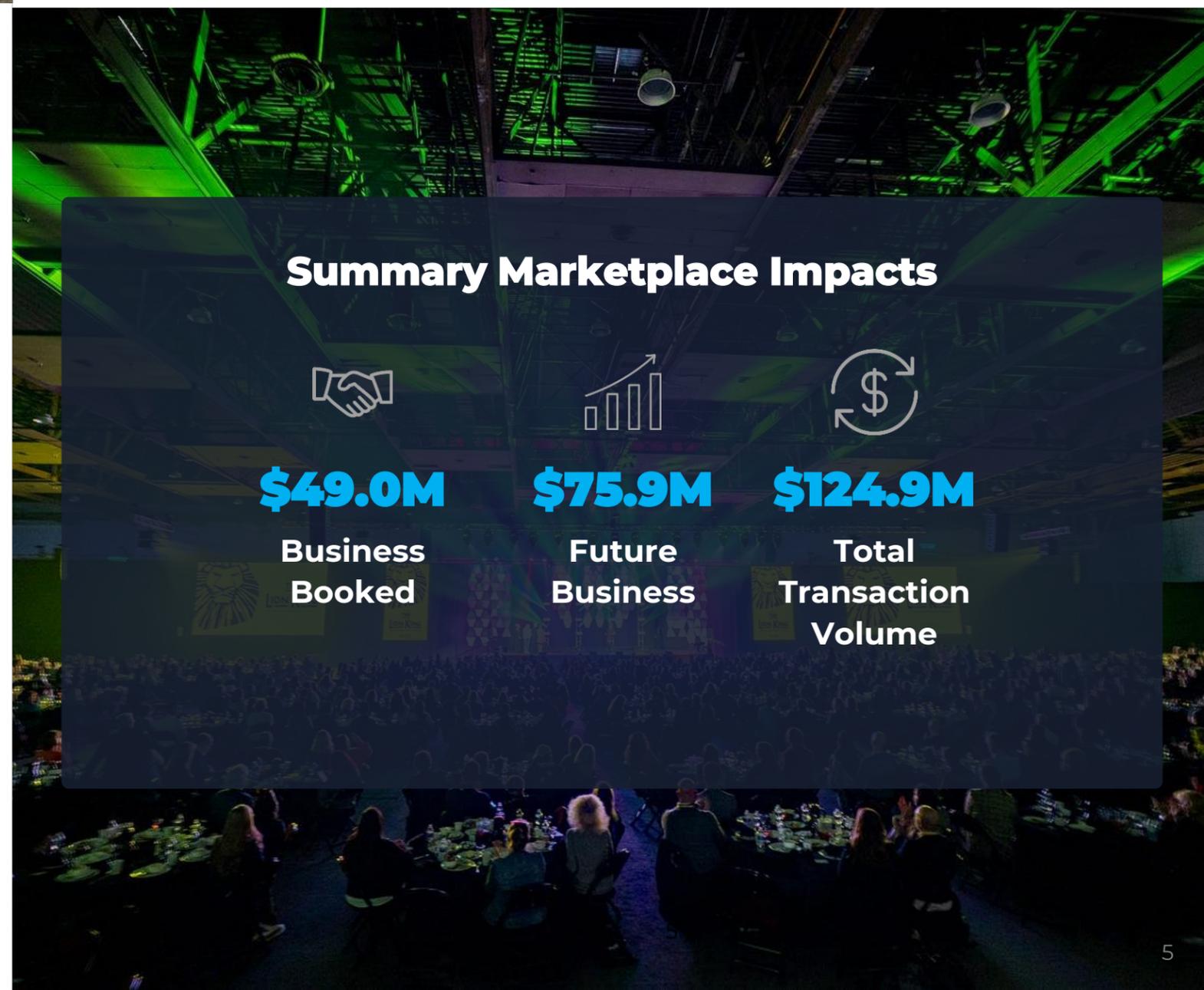
Combined, Marketplace generated an estimated:



**\$124.9 MILLION**

**In total sales-based transaction activity**

This total reflects seller-reported business only and avoids double-counting buyer-reported purchases.



### Summary Marketplace Impacts



**\$49.0M**

**Business Booked**



**\$75.9M**

**Future Business**



**\$124.9M**

**Total Transaction Volume**



## Industry Voices

To complement the quantitative results, participants shared firsthand reflections on how Marketplace drives tangible business outcomes.

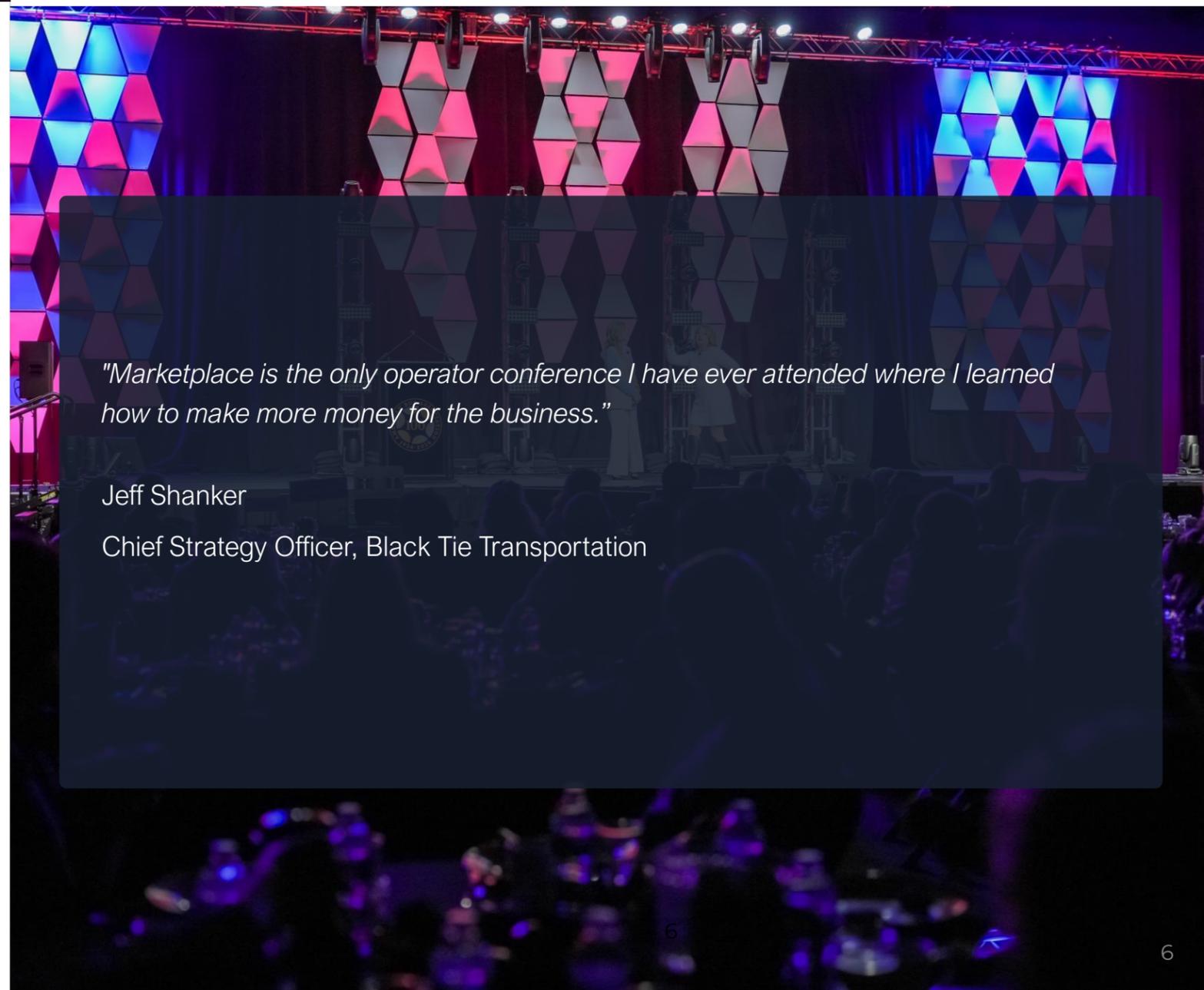
*"At Boston Duck Tours, we only need to book 90 passengers — two groups of 45 — to cover our expenses for ABA Marketplace. In practical terms, that means just two buses.*

*When you consider that a single appointment can lead to dozens of buses over time, the value and importance of the show become clear. We average more than 30 appointments each year and have grown our business considerably through our Marketplace strategy. The added networking and education opportunities provide meaningful added value beyond the direct business generated."*

Cindy Brown  
CEO, Boston Duck Tours

## Attendee Satisfaction and Likelihood to Return

Survey results showed strong engagement with Marketplace 2026. Eighty-eight percent of firms reported that the event met or exceeded their expectations for generating business, and the likelihood to return was similarly high. On a 0–10 scale, first-time attendees averaged 8.7, repeat attendees averaged 8.9, and the overall likelihood to re-attend was 8.8.

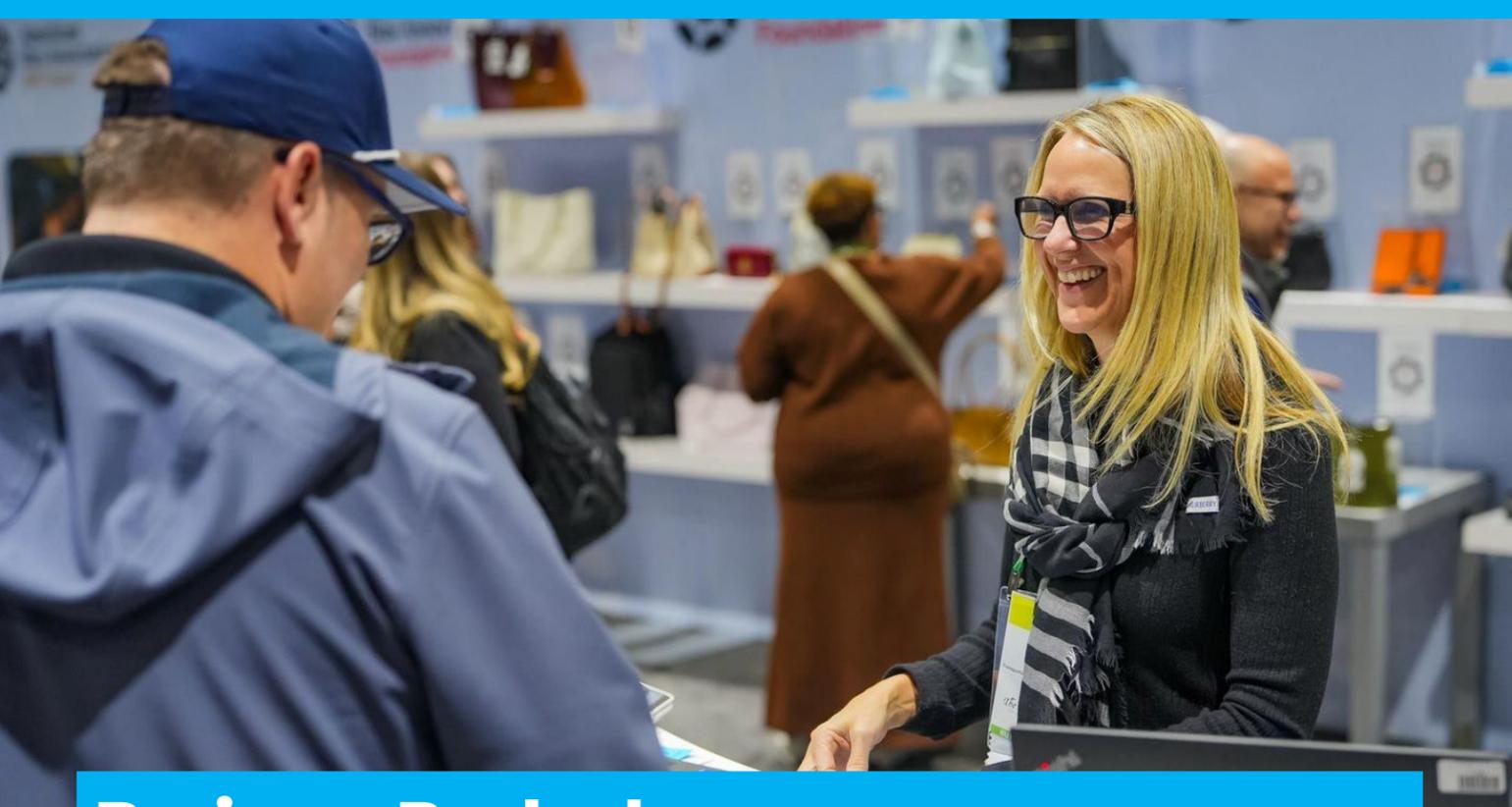


*"Marketplace is the only operator conference I have ever attended where I learned how to make more money for the business."*

Jeff Shanker  
Chief Strategy Officer, Black Tie Transportation

# BUSINESS BOOKED AT MARKETPLACE





## Business Booked

Participating firms reported measurable levels of confirmed business booked directly as a result of Marketplace appointments. This activity reflects transactions secured onsite or immediately following scheduled meetings and represents realized commercial outcomes attributable to event participation.

Survey respondents reported a combined **\$49.0 million** in business booked directly during ABA Marketplace.

 **\$49.0 MILLION**  
In confirmed booked sales

 **\$37,417**  
Average booked business per participating firm

 **47%**  
Share of firms reporting booked business at Marketplace

Confirmed booked activity was distributed across all major entity types represented at Marketplace.

### Booked Sales by Entity Type

Entity Type	Mean Booked Sales	Eligible Firms	Extended Booked Sales
Receptive Operator	\$44,339	190	\$8,424,464
Lodging Firm	\$26,995	189	\$5,101,992
DMO	\$27,533	297	\$8,177,291
Attraction	\$30,510	337	\$10,281,744
Associate Firm	\$95,362	88	\$8,391,868
Motorcoach Operator	\$41,716	207	\$8,635,186
<b>Total Booked Sales</b>	<b>\$37,417</b>	<b>1,308</b>	<b>\$49,012,545</b>

Source: Tourism Economics

- Attractions generated the largest extended volume of booked sales.
- Motorcoach Operators and Receptive Operators also reported substantial confirmed business.
- Associate Firms reported the highest average booked sales per responding firm.

While the magnitude of average booked sales varied by segment, every major category reported direct transactional outcomes. The distribution of booked business across entity types indicates that Marketplace functions as a multi-segment commercial platform rather than benefiting a single dominant group.

Overall, the results demonstrate that Marketplace facilitates immediate business generation across the industry supply chain.

# ANTICIPATED FUTURE BUSINESS





## Future Sales

In addition to confirmed transactions secured at Marketplace, participating firms reported substantial anticipated future business resulting from event appointments and connections.

This includes contracts in negotiation, repeat bookings under development, and projected transactions tied to Marketplace interactions. Based on survey responses extended across the full attendee base, Marketplace is estimated to generate **\$75.9 million** in anticipated future sales.

 **\$75.9 MILLION**  
In anticipated future sales

 **\$56,888**  
Average future business per participating firm

 **82%**  
Share of firms reporting future business at Marketplace

This pipeline activity exceeds the volume of business booked onsite, underscoring the longer-term commercial value of appointment-based engagement.

Anticipated future sales were reported across all entity categories, indicating that Marketplace supports sustained commercial activity beyond the event itself.

### Future Sales by Entity Type

Entity Type	Mean Future Sales	Eligible Firms	Extended Future Sales
Receptive Operator	\$78,643	190	\$14,942,143
Lodging Firm	\$53,267	189	\$10,067,404
DMO	\$34,346	297	\$10,200,808
Attraction	\$41,116	337	\$13,856,256
Associate Firm	\$109,431	88	\$9,629,934
Motorcoach Operator	\$83,270	207	\$17,236,857
<b>Total Future Sales</b>	<b>\$56,888</b>	<b>1,308</b>	<b>\$75,933,402</b>

Source: Tourism Economics

- Motorcoach Operators generated the largest projected future sales volume.
- Receptive Operators and Attractions also reported strong forward-looking activity.
- Associate Firms reported the highest average anticipated future sales per responding firm.

Compared to booked sales, future sales estimates were higher across most entity types, suggesting that Marketplace serves not only as a transaction venue but also as a pipeline-building platform.

The scale of projected activity indicates that the economic impact of Marketplace extends well beyond the event dates, reinforcing its role in facilitating ongoing industry commerce.

# TOTAL TRANSACTION VOLUME





## Total Marketplace Transaction Volume

Combined, confirmed booked sales and anticipated future sales reflect the full volume of seller-reported commercial activity attributable to Marketplace participation.

Based on extended survey results, total Marketplace-generated transaction activity is estimated at:


**\$124.9 MILLION**  
**In total sales-based business volume**

This figure includes:

- \$49.0 million in business booked directly at Marketplace
- \$75.9 million in anticipated future business resulting from Marketplace connections

Together, these components represent the aggregate value of commercial transactions facilitated through the event.

The total transaction volume reflects seller-reported sales activity only. Buyer-reported purchases are presented separately in this report to provide additional context but are not combined with sales totals in order to avoid double counting the same transactions.

By focusing on seller-reported outcomes, the estimate captures the full volume of commercial value generated through Marketplace participation while maintaining methodological consistency.

### Total Transaction Volume

Impact Category	Amount
Total Booked Sales	\$49,012,545
Total Future Sales	\$75,933,402
<b>Total Marketplace Transaction Volume</b>	<b>\$124,945,947</b>

Source: Tourism Economics

The results indicate that Marketplace functions as both:

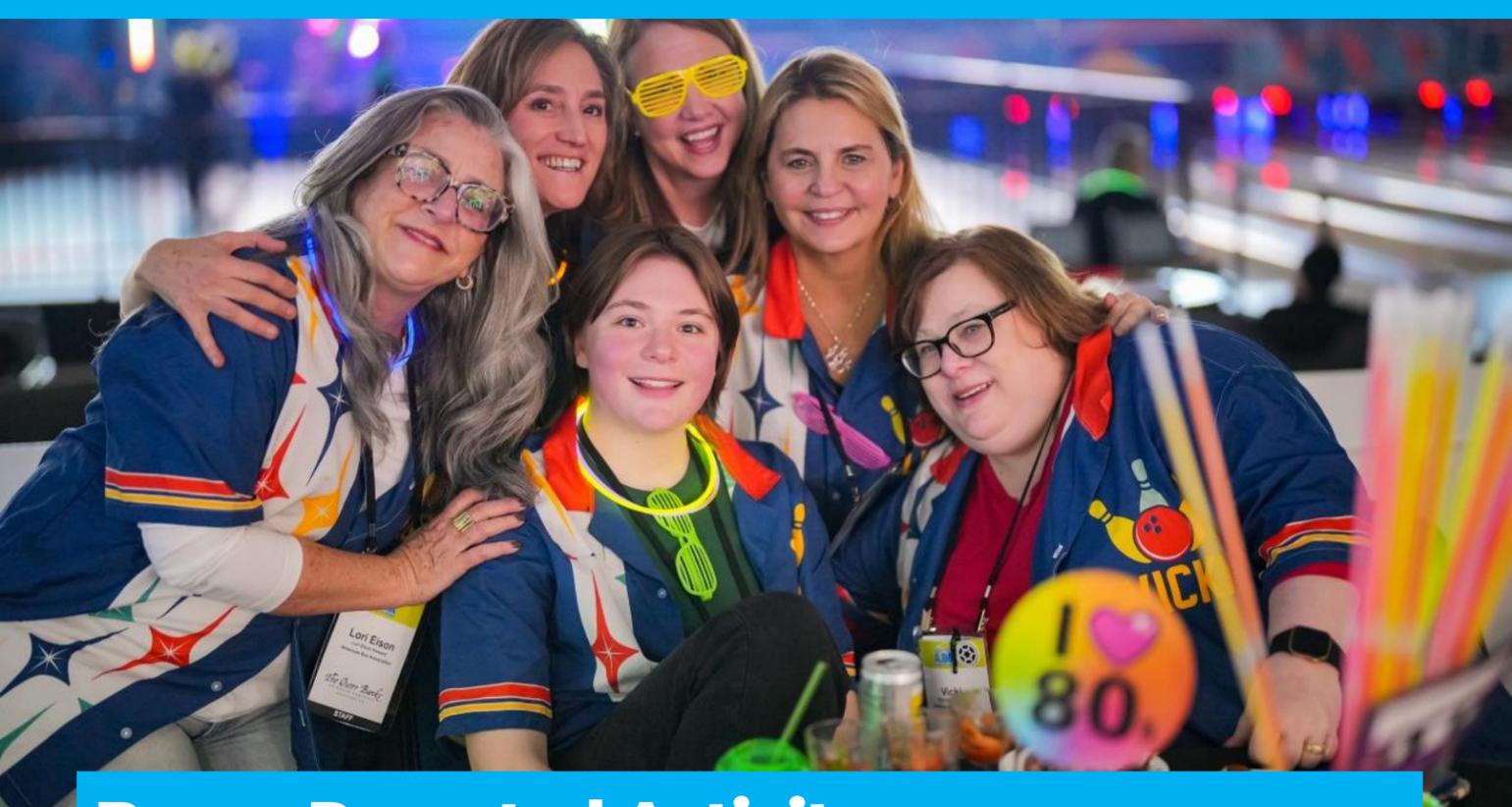
- A venue for securing immediate transactions
- A catalyst for ongoing business development

Notably, anticipated future sales exceed confirmed booked sales, suggesting that the event's commercial influence extends well beyond the appointment period itself.

The combined total of **\$124.9 million** reflects the cumulative business activity generated across entity types and demonstrates the scale of Marketplace as an industry trading platform.

# **SUPPLEMENTAL ANALYSIS: BUYER-REPORTED ACTIVITY**





## Buyer-Reported Activity

In addition to seller-reported sales activity, survey respondents were asked to report business purchases resulting from Marketplace participation. These figures are presented for contextual purposes and are not additive to the sales-based transaction totals reported in this study.

Buyer-reported data provide a complementary perspective on commercial activity facilitated through Marketplace and serve as a cross-check of overall transactional engagement.

### Buyer-Reported Purchases

Impact Category	Amount
Booked Purchases	\$11,730,440
Anticipated Future Purchases	\$33,383,558
<b>Total Buyer-Reported Activity</b>	<b>\$45,113,998</b>

Source: Tourism Economics

Buyer-reported purchases totaled \$45.1 million, including both confirmed transactions and anticipated future business.

As expected in a marketplace environment, buyer-reported totals are lower than seller-reported sales totals, reflecting differences in reporting behavior, entity roles, and response patterns. These figures should therefore be interpreted as directional validation rather than a standalone measure of total transaction volume.

Importantly, buyer-reported activity confirms that Marketplace facilitates meaningful commercial engagement from both sides of the industry supply chain.

### Booked Purchases by Entity Type

Entity Type	Mean Booked Purchases	Eligible Firms	Extended Booked Purchases
Receptive Operator	\$20,732	190	\$3,939,107
Lodging Firm	\$111	189	\$21,004
DMO	\$154	297	\$45,692
Attraction	\$319	337	\$107,653
Associate Firm	\$21,552	88	\$1,896,555
Motorcoach Operator	\$27,635	207	\$5,720,429
<b>Total Booked Purchases</b>	<b>\$8,894</b>	<b>1,308</b>	<b>\$11,730,440</b>

Source: Tourism Economics

### Future Purchases by Entity Type

Entity Type	Mean Future Purchases	Eligible Firms	Extended Future Purchases
Receptive Operator	\$47,571	190	\$9,038,571
Lodging Firm	\$1,333	189	\$252,000
DMO	\$275	297	\$81,593
Attraction	\$5,931	337	\$1,998,597
Associate Firm	\$63,793	88	\$5,613,796
Motorcoach Operator	\$79,222	207	\$16,399,000
<b>Total Future Purchases</b>	<b>\$25,848</b>	<b>1,308</b>	<b>\$33,383,558</b>

Source: Tourism Economics

# IMPLICATIONS AND MARKETPLACE VALUE



## Implications and Marketplace Value

The results of this analysis indicate that ABA Marketplace functions as a high-volume commercial platform for the motorcoach and group travel industry. With an estimated **\$124.9 million in total sales-based transaction activity**, the event generates both immediate confirmed business and a substantial forward-looking pipeline.

Several key implications emerge from the findings:

- Business generation is distributed across all major entity types, demonstrating broad-based commercial engagement.
- Anticipated future sales exceed confirmed booked sales, underscoring the importance of Marketplace as a relationship-building and pipeline development venue.
- Transaction activity is not concentrated within a single segment, indicating that the event supports a multi-directional industry marketplace.

The magnitude of both booked and anticipated business suggests that Marketplace participation provides measurable commercial returns for a wide range of firms.

Overall, the analysis demonstrates that ABA Marketplace serves as a structured trading environment that facilitates measurable economic activity across the industry supply chain.



# APPENDIX



# Survey Overview and Methodology

## Survey Overview

Following ABA Marketplace, an online survey was administered to attending firms to measure business activity attributable to event participation. The survey collected information on:

- Business booked directly at Marketplace
- Anticipated future business resulting from Marketplace appointments
- Business purchases associated with Marketplace participation
- Firm characteristics and entity type

A total of 328 firms completed the survey, representing a 25% response rate among the 1,308 unique firms attending Marketplace.

Attendee records were de-duplicated to reflect unique firms rather than individual attendees.

## Methodology

Reported sales and purchase values were winsorized at the 95th percentile to limit the influence of extreme outliers while preserving the overall distribution of reported activity. Blank responses were treated as missing data, while reported zeros were retained as valid responses.

Mean reported values were calculated by entity type and multiplied by the total number of eligible firms within each corresponding category to estimate total Marketplace-generated transaction activity. Seller-reported sales were used as the primary basis for estimating total transaction volume. Buyer-reported purchases are presented separately and are not additive to seller-reported totals in order to avoid double-counting.

All results reflect self-reported business activity and anticipated future transactions as estimated by respondents at the time of survey completion.

### Context on Supplier Reporting

Marketplace transactions often involve multiple partners—operators, destinations, and lodging—contributing to a single product. Because these partners engage at different stages of the sales cycle, reporting practices vary by segment.

- Intermediaries: Tour and receptive operators often have early visibility into bookings, leading them to report higher levels of anticipated business.
- Suppliers: Lodging and attractions typically recognize revenue later, once itineraries are finalized and reservations are confirmed.

Consequently, discrepancies in reported future business across cohorts usually reflect differences in revenue attribution, rather than actual variations in Marketplace-driven activity.

This pattern is consistent with standard post-event surveys that capture transactions within a specific window.

## About the Research Team

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Oxford Economics is an adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base comprises over 2,000 international organizations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics in order to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics employs 600 full-time staff, including 300 professional economists and analysts. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC.



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