



## **Impact of New and Steep National Park Fee Changes on Bus and Tour Operators**

*April 2026*

The survey was designed to capture both the direct impacts of new National Park Service (NPS) fee increases (including commercial vehicle entrance and per-passenger international visitor fees) and the broader economic pressures already affecting commercial tour operators, such as inflation, fuel costs, labor, insurance, and declining international demand. Responses indicate that while operators are already navigating a challenging cost environment, additional fee increases act as a compounding pressure that amplifies existing business risks. Overall, findings show that significant fee increases are expected to reduce demand, lower revenues, compress margins, shift tours away from national parks, and create ripple effects in gateway economies

- **Demand is highly price sensitive**
  - Even 5–10% price increases are expected to reduce bookings; larger increases are already causing cancellations and smaller group sizes
  - International demand is most impacted, with operators reporting sharp declines and shifting interest to non-U.S. destinations
- **Revenue losses are expected and already occurring**
  - Operators anticipate 10–20%+ declines in bookings and significant revenue losses, often in the \$50K–100K+ range annually
  - Some businesses report lost tours, canceled series, and reduced advance bookings
- **Profit margins will be compressed**
  - Most operators expect moderate to significant decreases in margins
  - Fee increases cannot be fully passed on without further reducing demand, forcing operators to absorb part of the cost
- **Cost pass-through is limited**
  - On average, operators expect to pass along roughly 50–75% of fee increases to customers, while absorbing the remainder internally



- This reflects a constrained pricing environment where full cost recovery is not feasible without reducing demand
- **Tour offerings will be reduced or restructured**
  - Likely actions include:
    - Fewer national park tours
    - Elimination of select parks or routes
    - Shorter itineraries / fewer park stops
    - Shifts to alternative destinations (state parks, international markets)
- **Business models will shift away from NPS-dependent tours**
  - Operators indicate plans to:
    - Reduce reliance on national parks
    - Offer lower-cost or shorter products
    - Expand non-U.S. or non-NPS offerings
- **U.S. tourism competitiveness is at risk**
  - Higher fees—especially for international visitors—make U.S. tours harder to sell globally
  - Travelers are increasingly choosing alternative destinations with lower total costs
- **Impacts extend to local economies**
  - Group tours drive significant spending in hotels, restaurants, and attractions
  - Reduced tour volume will likely decrease economic activity in gateway communities
- **Cumulative cost pressures amplify the impact**
  - Fee increases add to already rising fuel, labor, insurance, and inflation costs
  - Many operators report existing declines in bookings and group sizes
- **Strong preference for phased implementation**
  - Tours are priced 12–24 months in advance, limiting flexibility



- A phased approach would:
  - Reduce “sticker shock”
  - Allow gradual price adjustments
  - Prevent cancellations tied to sudden cost increases