

THE STATE OF GROUND AND SEA TRANSPORTATION 2024

10 KEY INSIGHTS

PRESENTED BY

Skift. + **travelier.**



WHY GROUND AND SEA TRANSPORTATION

In 2017, during my honeymoon in the Philippines, I spent two days struggling to catch a bus from Manila to the rice fields up north. The lack of information, availability, and secure payment options was frustrating—and it became clear this was a common experience for many travelers. That moment sparked the creation of Travelier (originally Bookaway)—a solution to the gaps in the non-air travel sector.

Ground and sea transportation is often overshadowed by air travel, hotels, and car rentals, yet it represents a \$198 billion industry within the \$3 trillion global travel market. With over 170,000 bus, ferry, and train stations worldwide—far more than airports—this sector unlocks access to some of the world’s most beautiful and remote destinations.

Post-pandemic overtourism in cities like Amsterdam, Barcelona, and London has highlighted the need for better access to these hidden gems, often only reachable by ground or sea. Despite its potential, ground and sea transportation remains underrepresented in media and industry discussions.

That’s why Travelier has sponsored the first dedicated market research on ground and sea transportation, in partnership with Skift. This long-overdue effort will provide critical data and insights to help the sector reach its full tech-enabled potential.

I urge travel industry decision-makers to pay attention to this market. By incorporating ground and sea transportation, you can offer customers a seamless, connected trip and unlock high-margin revenue streams. Let this research guide you toward what’s next.

Noam Toister, Co-Founder and CEO, Travelier

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ABOUT SKIFT

Skift is the largest industry intelligence platform, providing media, insights, and marketing to key sectors in travel.

SkiftX is Skift’s in-house content marketing studio, working collaboratively with partners on integrated projects including webinars, video, research, and live events.

Visit skiftx.com to learn more or email at skiftx@skift.com.

GROUND & SEA TRANSPORTATION PRESENTS MASSIVE OPPORTUNITY

Travel companies aspire to provide a truly connected trip, seamlessly integrating various travel components into a single, cohesive booking experience. While lodging, airlines, and experiences tend to dominate the conversation, **ground and sea transportation is an important and lucrative, yet underexplored, final piece in the puzzle.**

A largely fragmented and offline marketplace, ground and sea transportation consists of the **buses, ferries, trains, and transfers** that travelers take in-destination.

Despite consumers' desire for a modern, digital booking experience, **bringing the sector online has been challenging** due to a fragmented market dominated by small businesses, operators' dependence on manual processes, and the lack of a robust tech standard.

The disparity between the sector's crucial role in the overall travel market and its underdeveloped online booking **represents a significant opportunity for digital transformation** – one that ambitious companies are racing to achieve.

This insights deck, created in partnership with Travelier, explores for the first time the **market opportunity ground and sea transportation presents, the shift towards digital solutions**, and the industry dynamics driving consolidation.



ABOUT THE RESEARCH

Unless otherwise noted, the data cited in this Insights Deck comes from proprietary research conducted by Skift Advisory on behalf of Travelier in May 2024.

Skift Advisory's research methodology involved using data from multiple sources, including tourism volume, travel expenses, intercity expenses, online usage, and future forecasts, to provide a robust and reliable estimate of market potential.

As part of its research, Skift Advisory also conducted a survey of more than 2,500 travelers in the United Kingdom, United States, Germany, India, and China, which covered international travel, past and future intercity travel, travel preferences, modes of transportation perceptions, and online booking platform usage.

Skift Advisory research and survey responses provide the first ever global market size estimate for ground and sea transportation.

In the sections that follow, Skift and Travelier highlight the results from this market size research, including market dynamics and potential opportunities in the evolving travel industry.





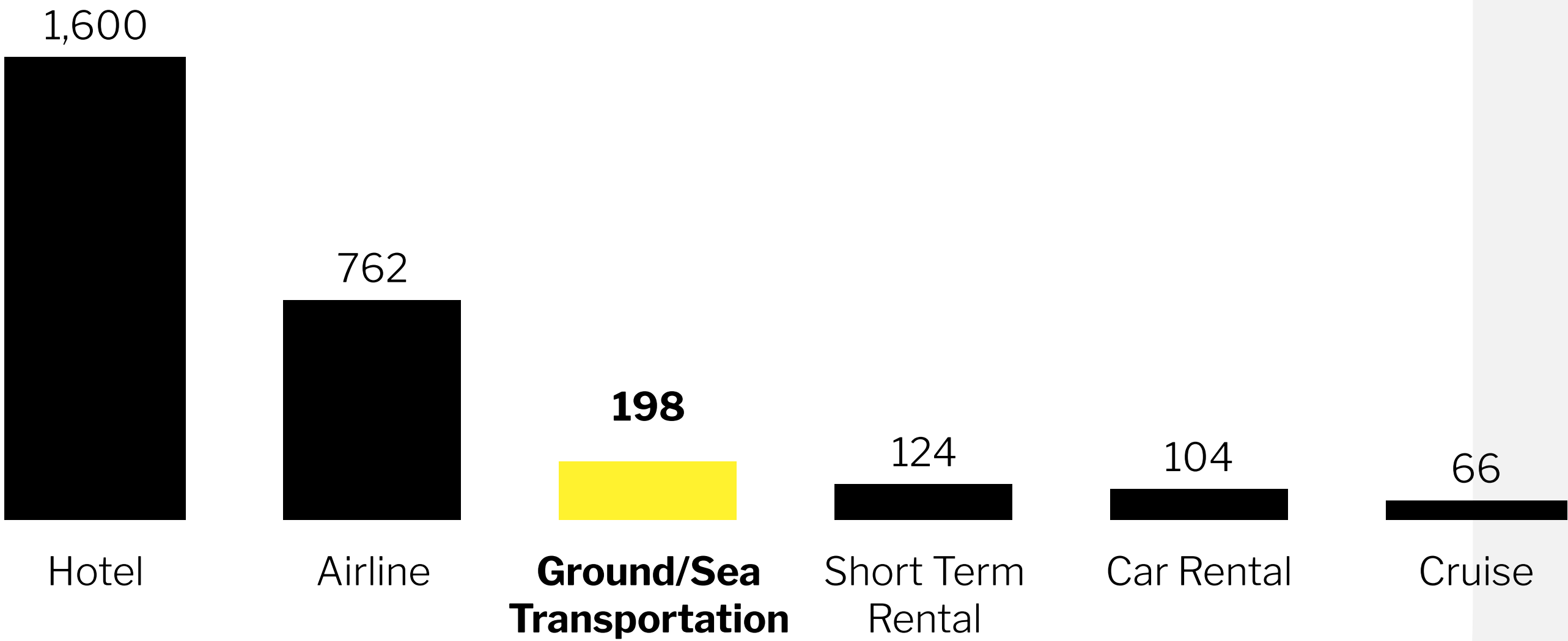
SIZING THE MARKET

GLOBAL GROUND AND SEA TRANSPORTATION IS \$198B MARKET, SURPASSING OTHER MAJOR TRAVEL SECTORS

In 2024, Skift Advisory assessed the ground and sea transportation market at \$198 billion—representing a significant sector in the \$3 trillion travel industry and surpassing the market value of short term rental, car rental, and cruise.



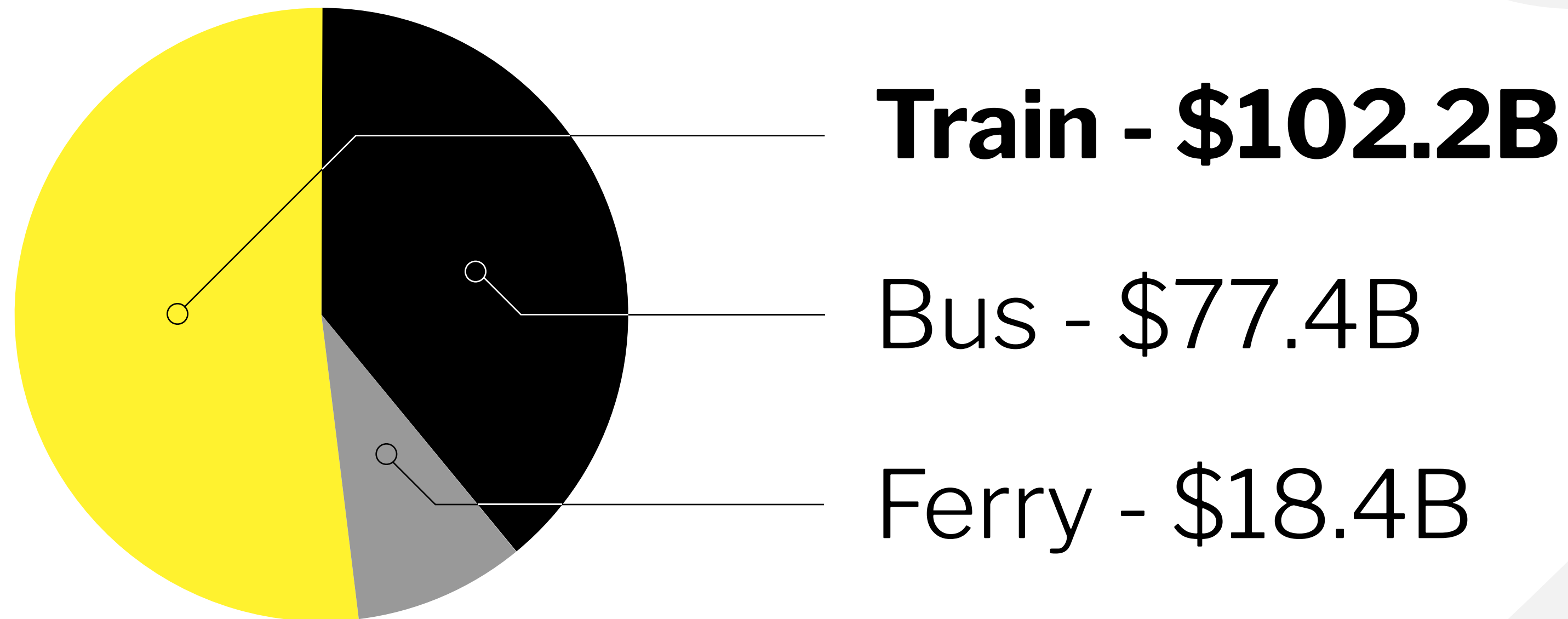
Global Market Size by Sector (\$US Bn)



Source: Market sizing as calculated by SkiftX using third party estimates ([Ibis World](#), [Grand View Research](#), [Cruise Market Watch & Expert Market Research](#))

TRAIN: THE BIGGEST OPPORTUNITY WITHIN GROUND AND SEA TRANSPORTATION SECTOR

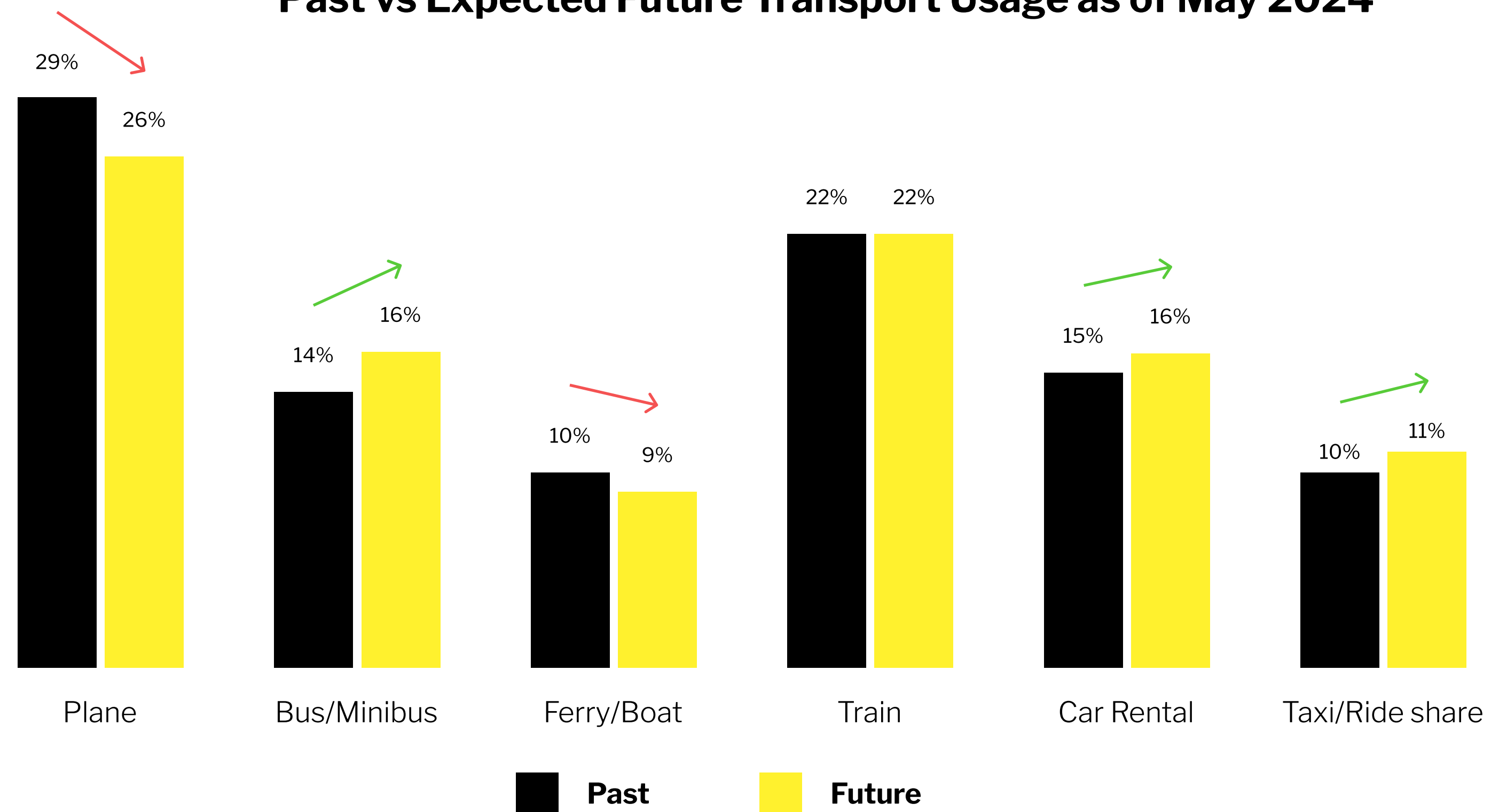
Train is the biggest segment in the ground and sea transportation market overall and contributes the most in the majority of markets, reflecting travelers' general preference for train travel. However, bus travel is more dominant in the Americas, Africa, and Asia (excluding China and Japan) where train infrastructure is underdeveloped, indicating that the largest opportunities align with the modes most readily available in the region.



GROUND TRANSPORTATION EXPECTED TO GROW AS IT CAPTURES MARKET SHARE FROM AIR FOR INTERCITY TRAVEL

While air travel dominates intercity travel, there is a general decline in intended plane usage globally. Meanwhile, travelers plan to increase their use of bus, car rental, and rideshare. Travelers are increasingly looking towards alternative modes of intercity transport, driven by factors such as cost, environmental concerns, and convenience.

Past vs Expected Future Transport Usage as of May 2024



AIRPLANES WILL ONLY GET TRAVELERS SO FAR

Ground and sea transportation is a critical link in the connected trip. Once at their destination, travelers book three to five intercity trips on average. Travelers need convenient ways to get from place to place within a region—especially in light of sustainable and slow travel trends inspiring longer, more adventurous stays off the beaten path.

Oftentimes ground and sea transportation is the only option available—making it a crucial piece in travelers’ journey.

“

Ground and sea transportation isn’t just a choice—it’s often the only way to reach those hidden gems and iconic spots that make a journey unforgettable. Whether its a scenic train, coastal ferry, or bus winding through the countryside, these services are an essential part of travel. While travelers instinctively reach for their phone to book an Uber, many still don’t realize there’s a mobile-friendly way book these options and access places beyond their flight’s final stop.



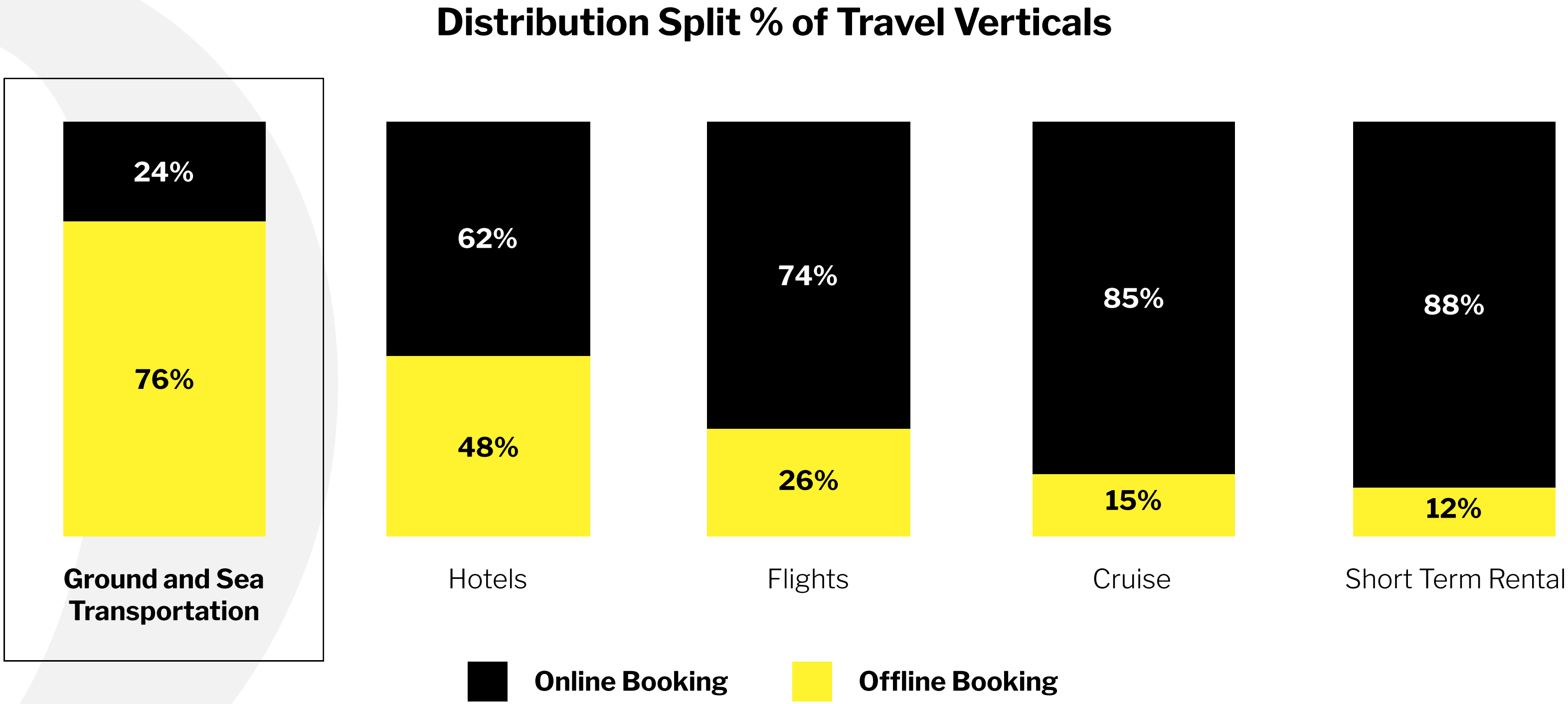
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Co-Founder and CEO,
Travelier



THE DIGITAL OPPORTUNITY

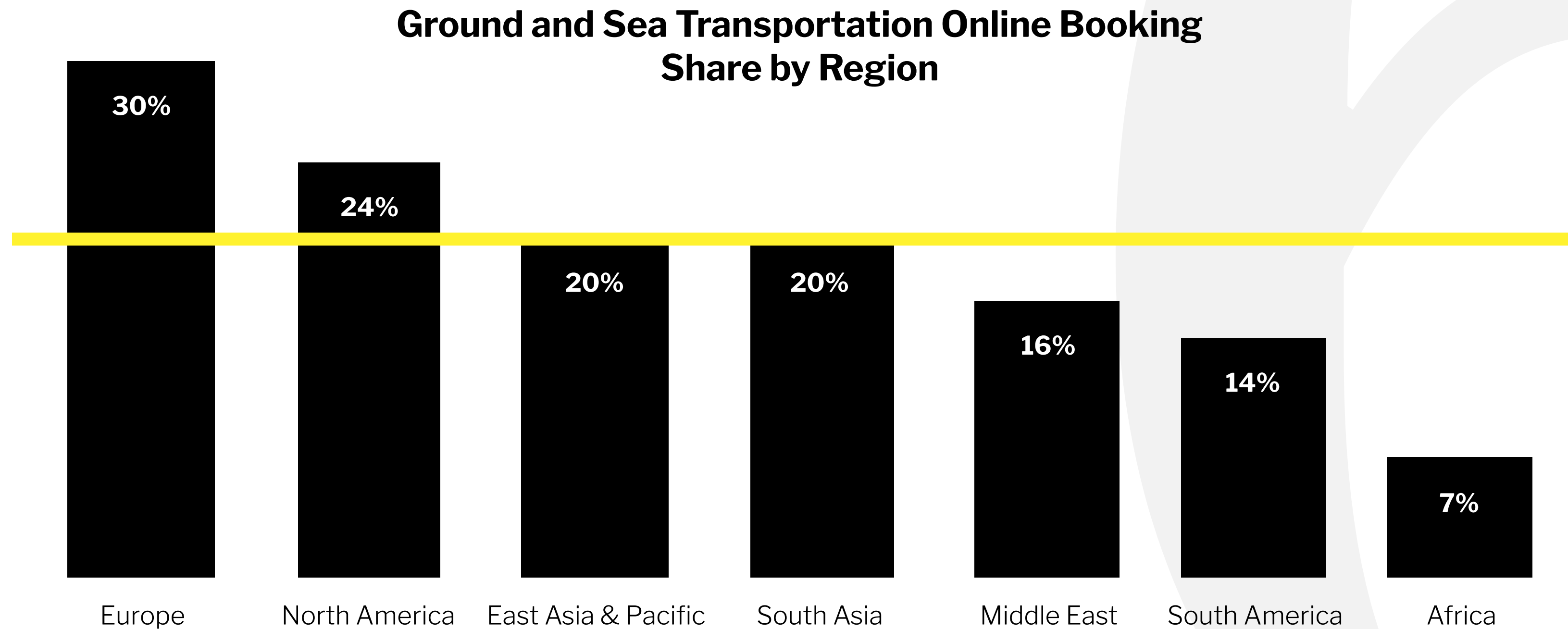
GROUND AND SEA TRANSPORTATION IS ONE OF THE LAST OFFLINE TRAVEL VERTICALS

Although 82% of travelers prefer planning their trips online according to [Skift Research](#), unlike other verticals in the travel industry, the booking of ground and sea transportation is still predominantly done offline. The fragmented nature of the market, a reliance of manual processes, and operators' reluctance to invest in digitization all contribute to this dynamic.



ASIA, MIDDLE EAST, SOUTH AMERICA AND AFRICA: BIGGEST OPPORTUNITIES FOR DIGITIZATION

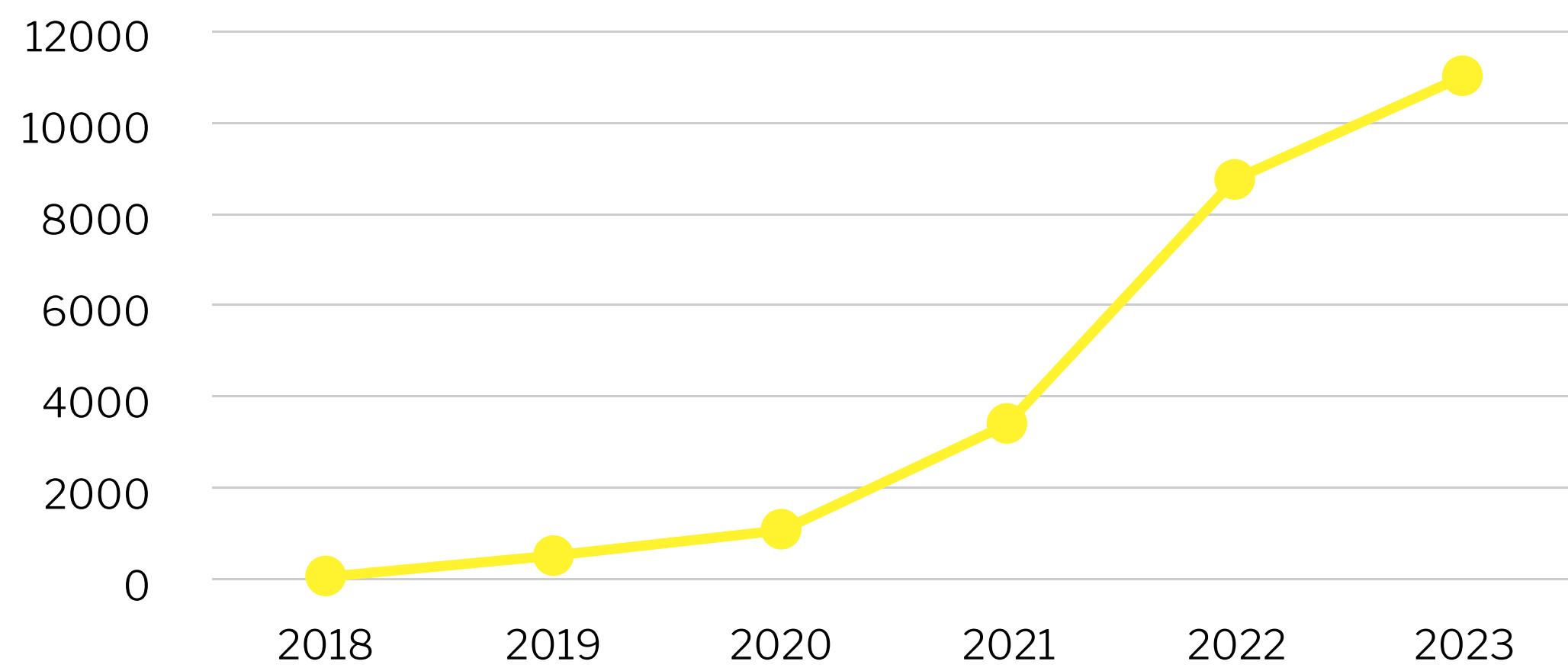
While the entire ground and sea transportation sector holds vast potential for digitization, regions such as Asia, Middle East, South America, and Africa in particular offer significant opportunities, with online bookings accounting for just 20% or less of transactions.



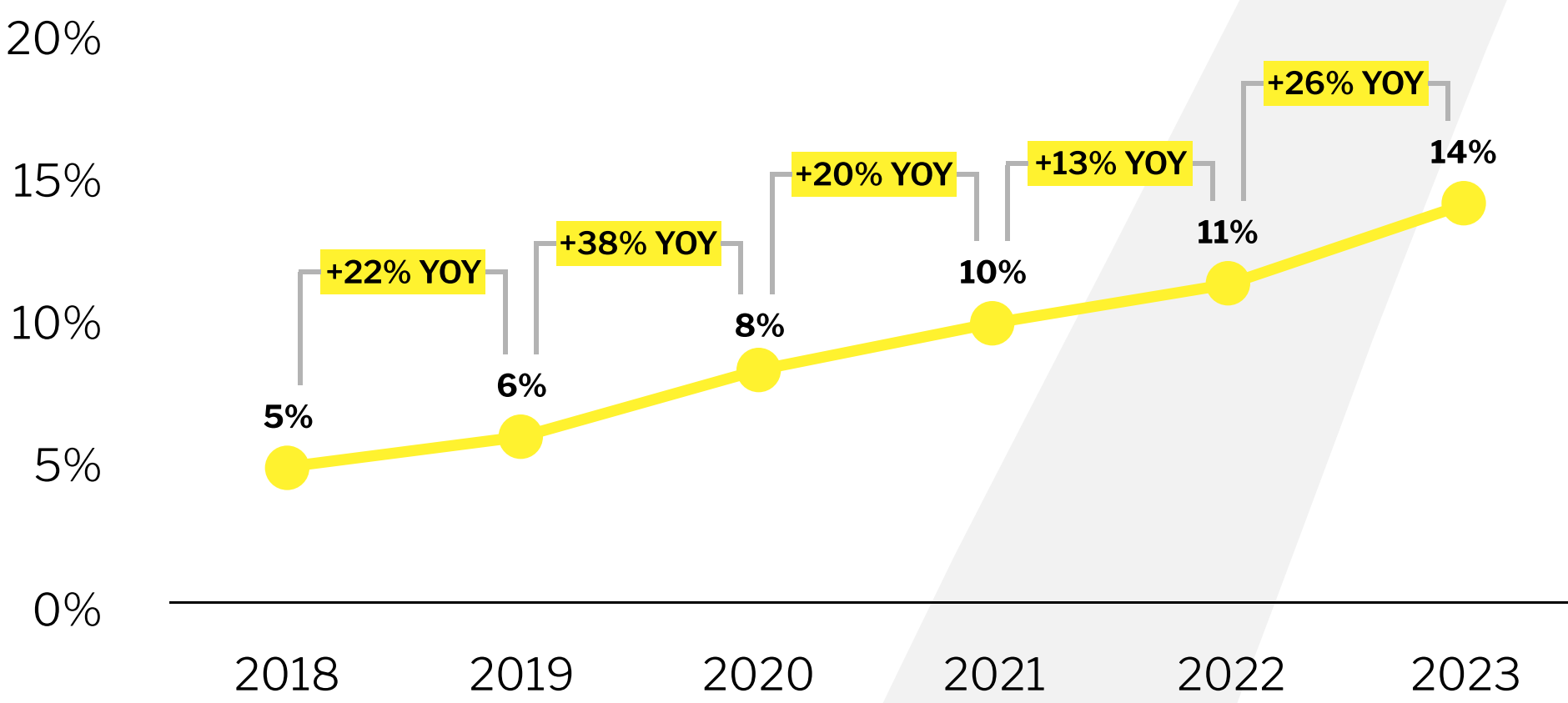
OPERATORS ARE RAPIDLY SHIFTING ONLINE IN RESPONSE TO CONSUMER DEMAND

The sector has seen substantial growth in both operator and consumer adoption rates of online platforms, with double-digit annual increases over the past five years. Operators are increasingly recognizing that consumers expect the same seamless and convenient online booking experience they find when booking airlines and hotels.

Operators Adoption Rate



Consumer Online Adoption Rate

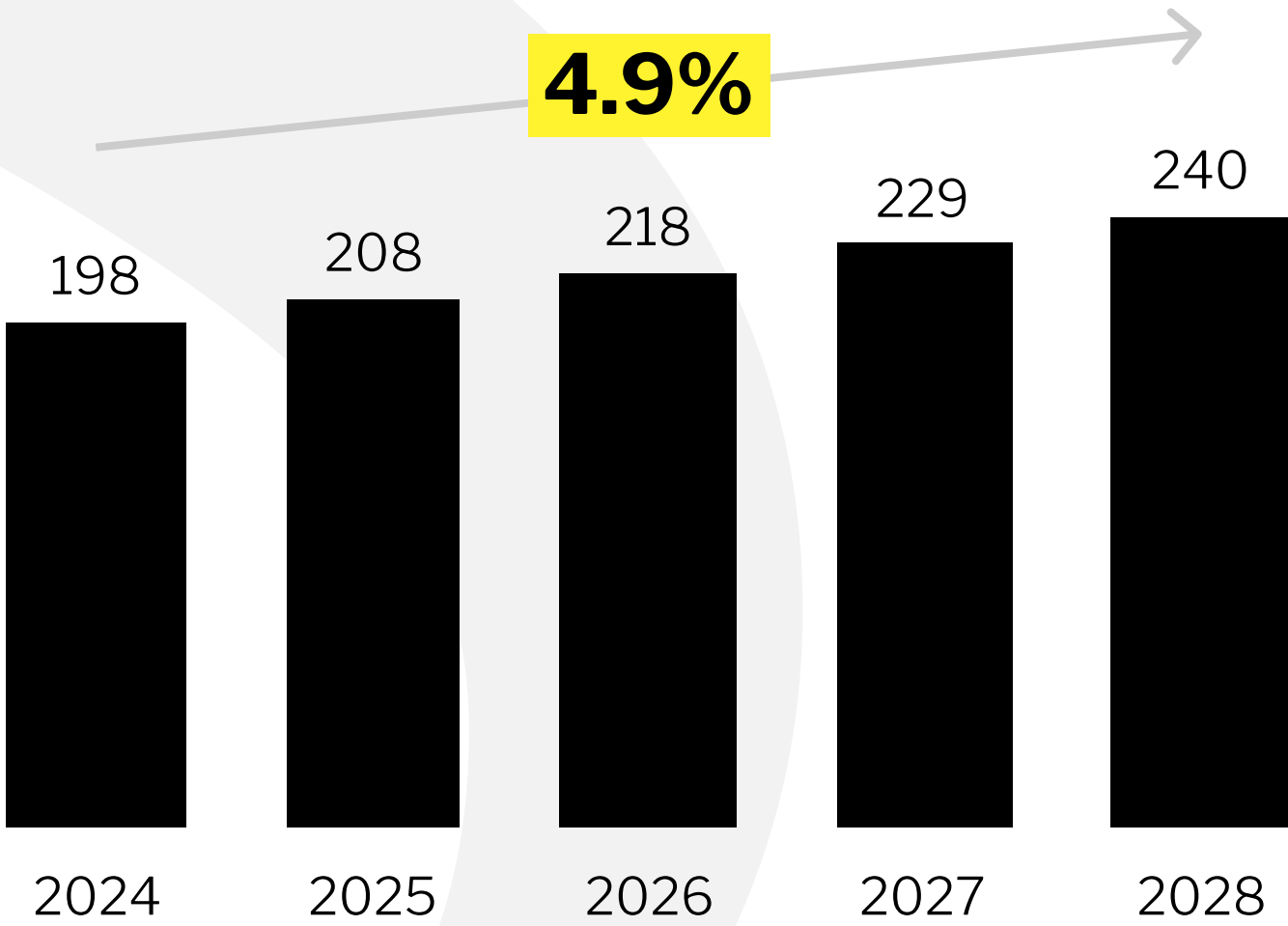


RATE OF DIGITIZATION OUTPACES GROWTH OF MARKET OVERALL, PRESENTING LUCRATIVE OPPORTUNITY

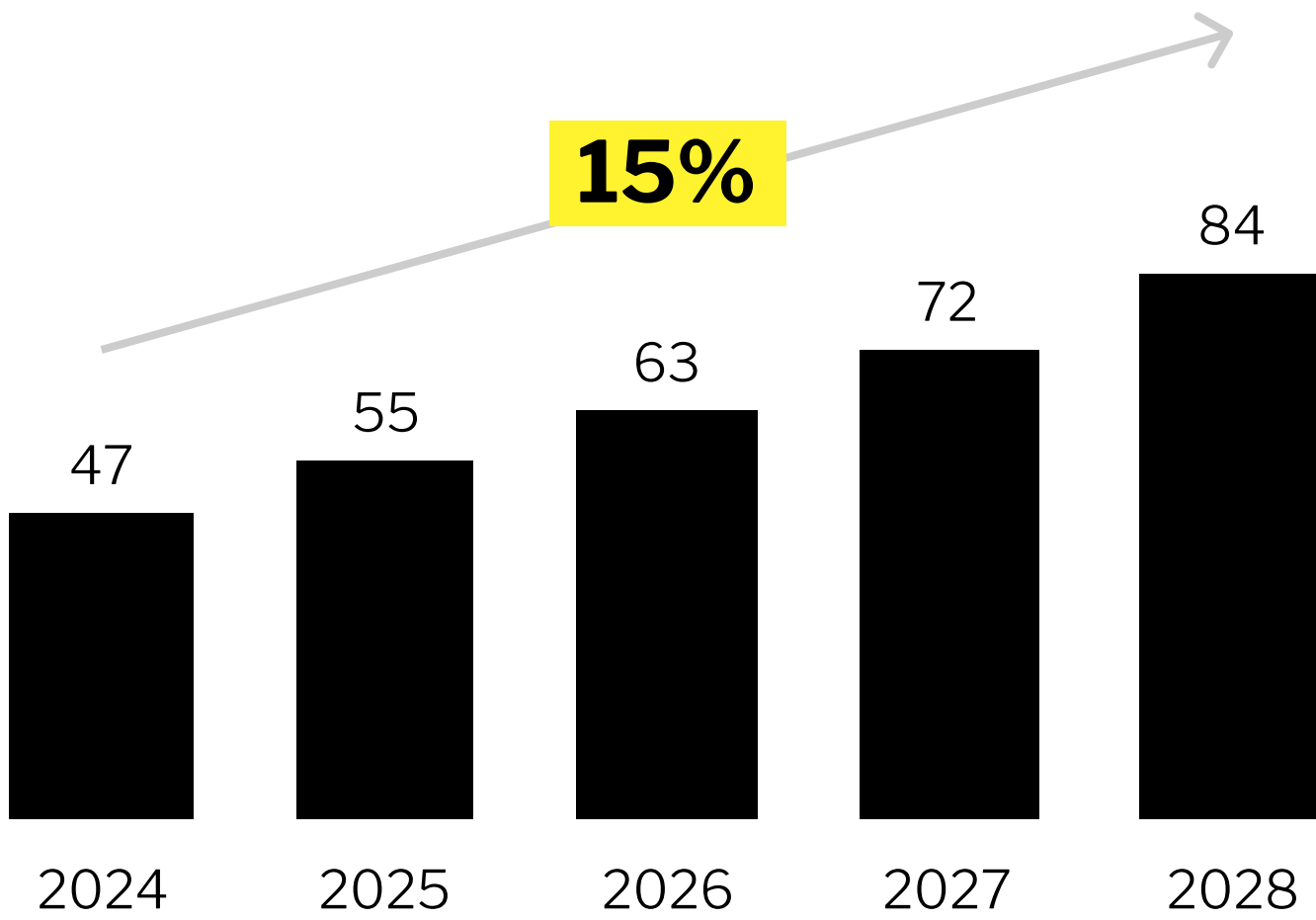
This rapid digital adoption will continue, with online booking projected to grow at a faster rate than the ground and sea transportation market as a whole. This presents a highly attractive market opportunity for online intermediaries to consolidate market share from small offline players.

Digital transformation of ground and sea transportation has the opportunity to follow a similar path to many travel sectors where multi-billion dollar businesses have been built around online travel agencies.

Ground and Sea Transportation: Growth Potential (USD \$Bn)



Online Booking: Growth Potential (USD \$Bn)





THE DISTRIBUTION LANDSCAPE

FRAGMENTED MARKETPLACE OFFERS ATTRACTIVE OPPORTUNITY FOR CONSOLIDATION

Unlike other markets in the travel industry which have been consolidated by the leading OTAs, the ground and sea transportation sector currently operates without a dominant market leader or standardized booking platform.

However, consolidation has begun, with several brand conglomerates emerging to bring ground and sea transportation supply online, integrate diverse offerings under unified platforms, simplify the booking process for consumers, and optimize backend operational logistics.

Most Significant Brand Conglomerates

travelier

Plataforma10, Bookaway, Getbybus, 12GO, DeOnibus, Sisorg (TMS), SeatOS (TMS)

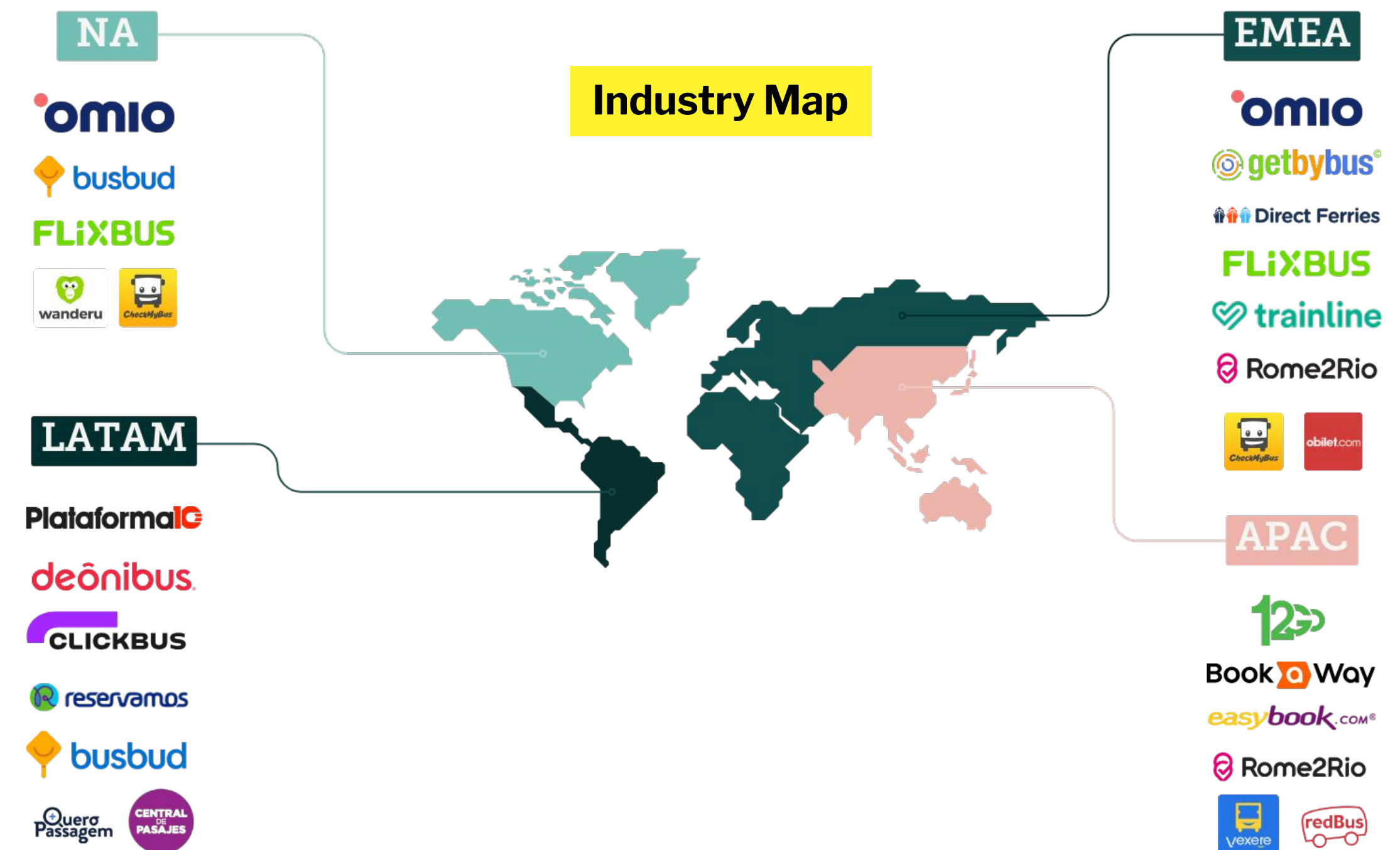
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Rome2Rio, Busradar.com

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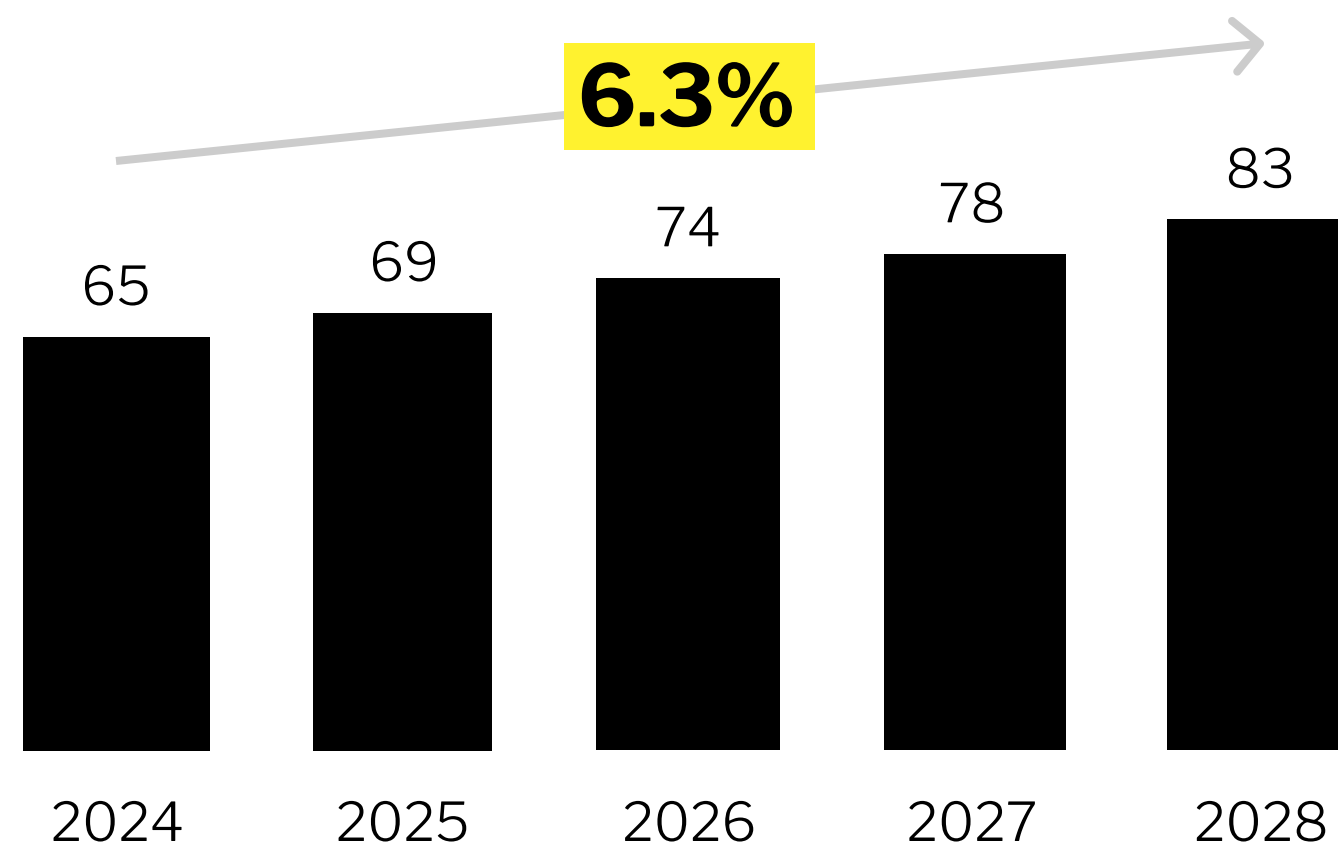
SPOTLIGHT ON ASIA

ASIA: FASTEST GROWING REGION WITH LARGE MARKET OPPORTUNITY

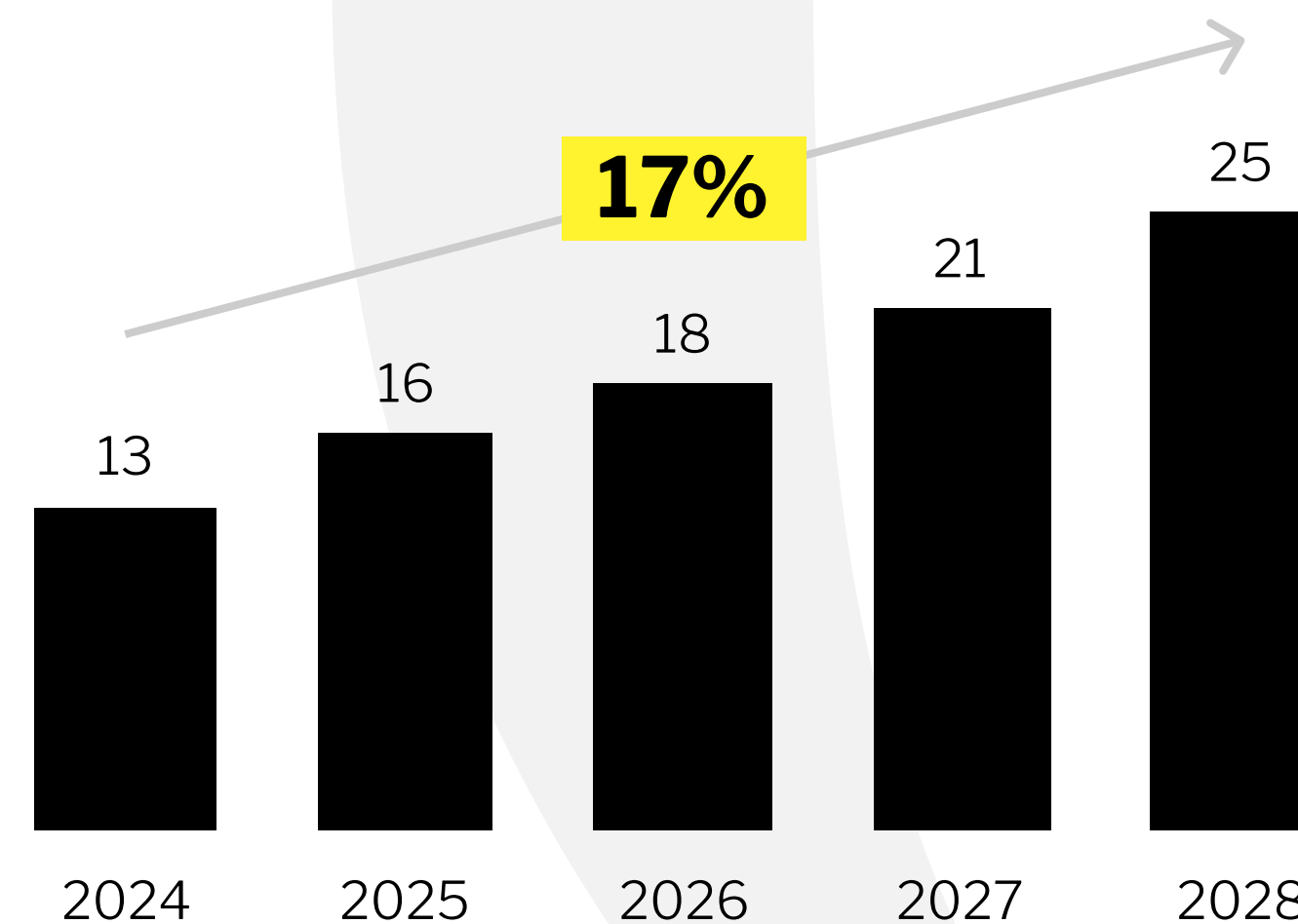
East Asia and Pacific currently represents one-third of global ground and sea transportation expenditure and is one of the fastest growing markets both in terms of revenue potential and online bookings. Nearly all (98%) of Chinese travelers are familiar with online booking platforms for ground and sea transportation, and unlike other markets, usage does not lag.

As the region continues its tourism rebound, Asia represents an important opportunity in the overall ground / sea travel market.

Asia Ground / Sea Travel: Growth Potential (USD \$Bn)



Asia Ground / Sea Online Booking: Growth Potential (USD \$Bn)



KEY TAKEAWAYS FOR CAPITALIZING ON GROUND AND SEA TRAVEL POTENTIAL

- Ground and sea transportation, valued at \$198 billion, is one of the most opportunistic and untapped prospects within the travel industry.
- Highly fragmented but growing as a sector and moving online, ground and sea transportation is an attractive space for online intermediaries to consolidate market share from small offline players.
- Online booking platforms are already beginning to consolidate—offering consumers and operators more seamless, scalable experiences.
- Often the only option for intercity travel within a destination, ground and sea transportation is set to remain a critical piece in delivering the connected trip.



ABOUT TRAVELIER

Travelier is a travel-tech company transforming the intercity transportation landscape, bridging the gap between modern travelers and local transportation providers within a \$198 billion market. Travelier's network of digital B2C platforms—12Go, Bookaway.com, Plataforma10, DeOnibus, Getbybus — enable customers to seamlessly book intercity tickets for ferries, buses, and trains worldwide. The company also owns under its B2B umbrella two TMS subsidiaries - SeatOS in Asia, and Sisorg in Latin America. In 2024 Travelier launched **'Travelier Connect'**, the largest GDS for ground and sea transportation enabling partners to integrate intercity ticket sales on their platforms, unlocking new revenue streams with a single API.

Learn more about Travelier at [**travelier.com/partners**](https://travelier.com/partners)

