redBus

redBus INDIA BUS TRACK

Intercity Bus Travel Trends in India by passengers, regions and private operators.

APRIL - JUNE 2024

# OVERVIEW OF INDIAN BUS INDUSTRY

Representation of major trends in the Indian bus industry in April – June 2024. This is indicative of all India bus data, it showcases volume and scale across the industry. These estimates pertain to the full intercity bus market derived from the redBus database and do not pertain only to sales on the redBus platforms. This market estimate is restricted to private bus operators and does not include SRTC's (State Road Transport Corporations)

Number of passengers travelling
Number of seats sold in April-June 2024

59.1 Mn
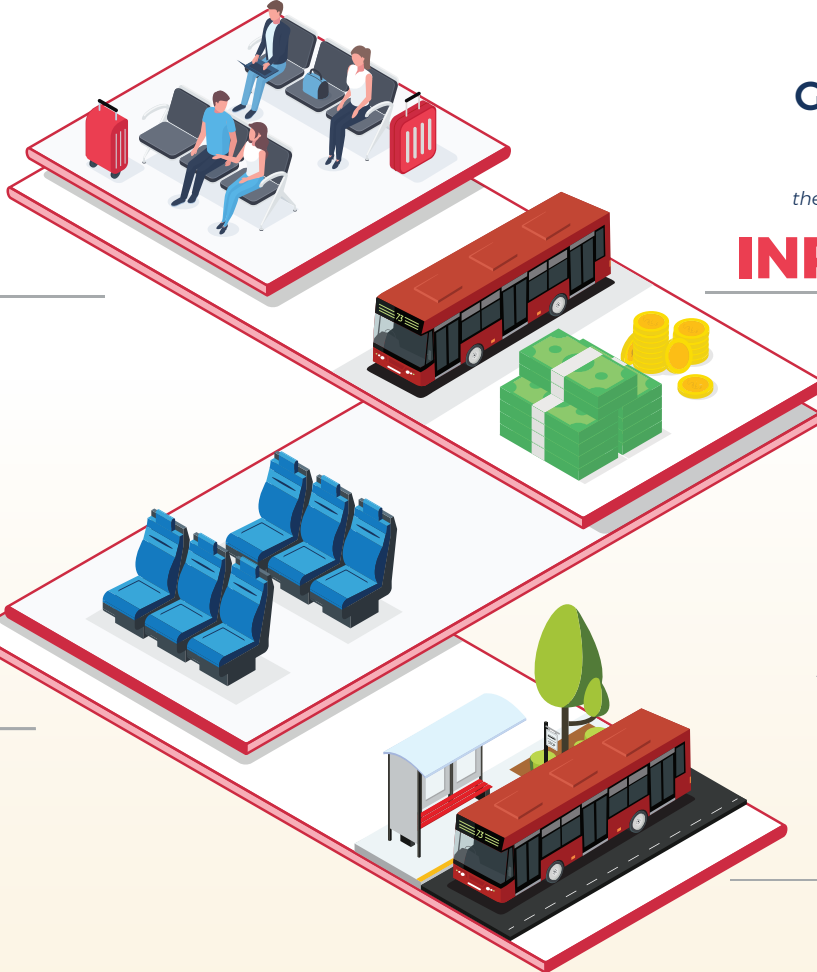
Gross Ticketing Value
Transaction value of all the seats sold in April-June 2024

INR 59.01 Bn

Average seat price
(Gross Ticketing Value/ Total seats)

INR 997

Active Pvt Bus Operators
Count of bus operators who have sold at least 1 seat in April-June 2024

4807

CEO's Quote

"This third edition of the India Bus Track covers the seasonally high April to June quarter. As expected, it was the peak travel season and 8 million more people traveled in the April to June quarter compared to the previous quarter. All India average occupancy rates improved to 78% for this quarter.

In this report, we have looked at how bus travel varies by route length. The most prevalent use case of intercity buses in the private sector is mid-range - i.e. between 250-750 km. We think there is a huge potential for long distance bus travel, i.e. above 750 km as occupancy rates for this distance range is the highest and also due to other factors such as newer highways & expressways and improvement in the capacity of buses to traverse long distances. This will provide alternate and affordable options for travelers for longer distance travel"

- PRAKASH SANGAM

Representation of major trends in the Indian bus industry in April – June 2024.
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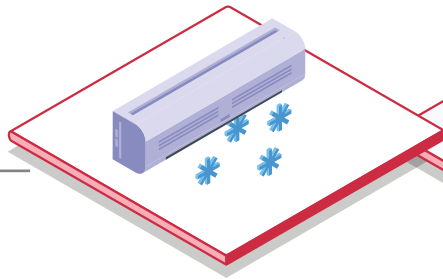
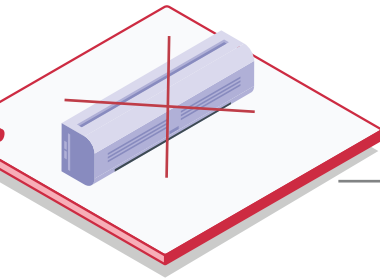## Unique bus routes in India
4,64,688
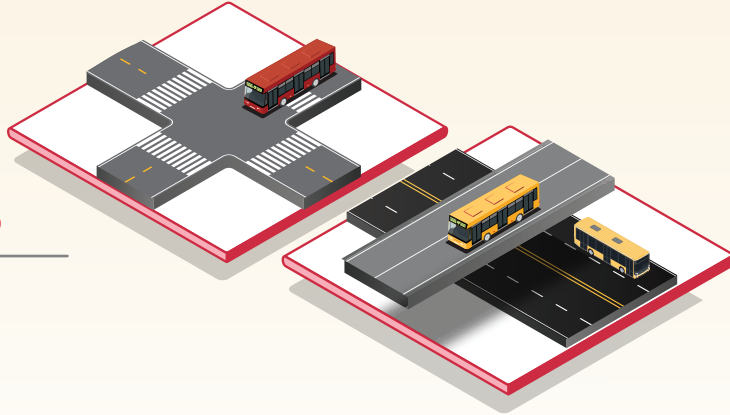
Unique towns connected
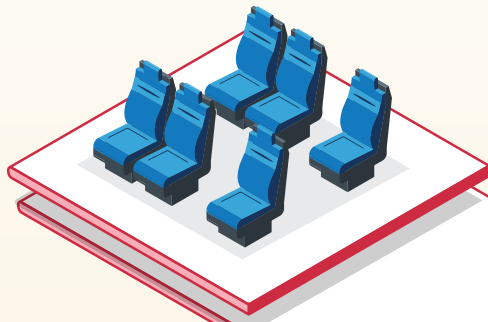**9,685**

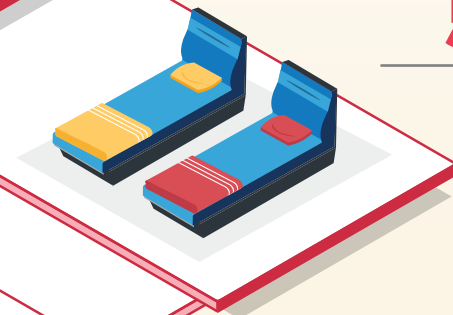## Journeys split by AC & Non-AC

AC
67%

Non-AC
33%

Journeys split by bus type

Seater
17%

Sleeper
50%

Hybrid
33%
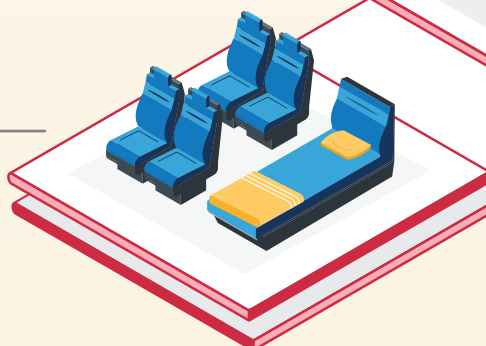
Bus occupancy trends by day of the week

No of travelled seats

85
80
75
70
65

Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday

Lowest (Tuesday)
Highest (Sunday)

Days of the week
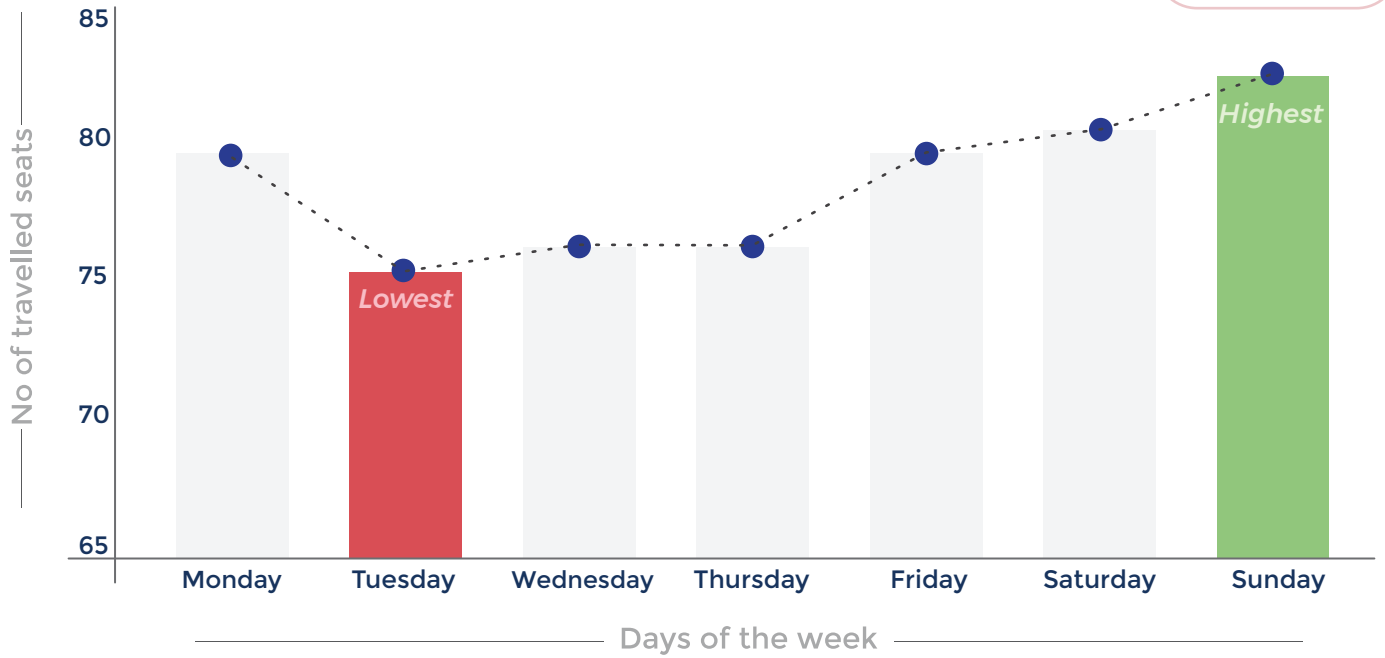
Bus occupancy trends

All India
78%

Kerala - Highest occupancy
85%
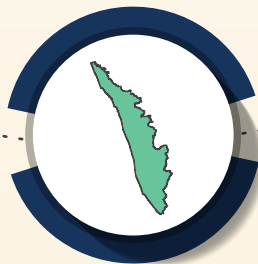
Madhya Pradesh & Chhattisgarh - Lowest occupancy
66%

Split of routes in India

60%
Long Routes
More than 250 kms

40%
Short Routes
Less than 250 kms

Seats By Region

This page shows a comparison of different regions in terms of bus seat bookings.
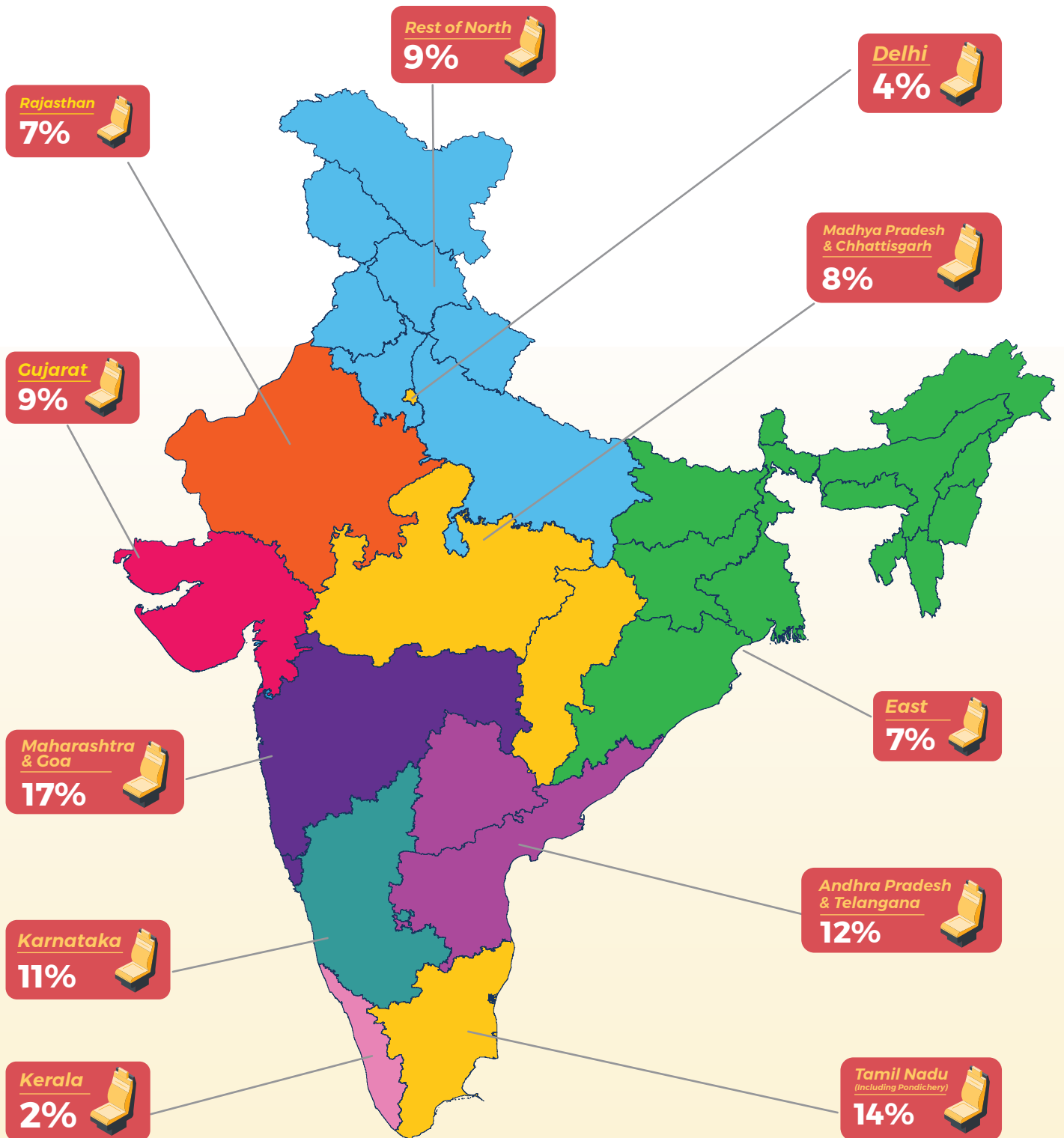
Rest of North
9%

Delhi
4%

Rajasthan
7%

Madhya Pradesh & Chhattisgarh
8%

Gujarat
9%

East
7%

Maharashtra & Goa
17%

Andhra Pradesh & Telangana
12%

Karnataka
11%

Kerala
2%

Tamil Nadu (Including Pondichery)
14%

North - *Jammu & Kashmir, Ladakh, Uttarakhand, Himachal Pradesh, Punjab, Haryana, Uttar Pradesh*

East - *Arunachal Pradesh, Assam, Nagaland, Manipur, Meghalaya, Tripura, Mizoram, Sikkim, Odisha, West Bengal, Jharkhand, Bihar*

PASSENGER TRENDS FOR BOOKINGS THROUGH REDBUS:

This section details out how Indians traveled, showcasing dominant demographic trends In April - June 2024. For deeper insights, redBus has highlighted some aspects of its sales. While these approximate overall industry trends, they are not an exact representation.
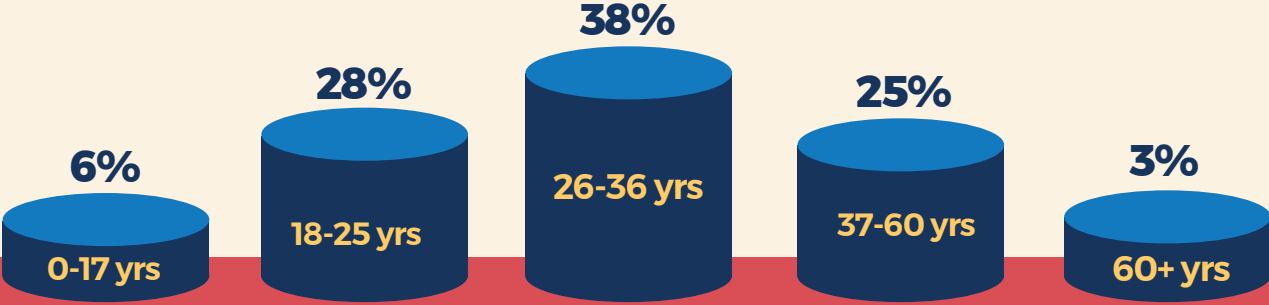
AGE OF BUS PASSENGERS

6%
0-17 yrs

28%
18-25 yrs

38%
26-36 yrs

25%
37-60 yrs

3%
60+ yrs

Age of passenger(s) traveling

GENDER OF BUS PASSENGERS

Females **34%**

Males **66%**

Gender of passenger(s) traveling

SINGLE VS. COUPLE VS. GROUP BOOKINGS

Single Bookings
50%

Couple Bookings
30%

Group Bookings
20%

More than two seats booked is classified as 'Group booking'

GEOGRAPHIC STATS

This section details how Indians traveled, showcasing dominant geographic trends in April - June 2024. For deeper insights, redBus has highlighted some aspects of its sales. While these approximate overall industry trends, they are not an exact representation.
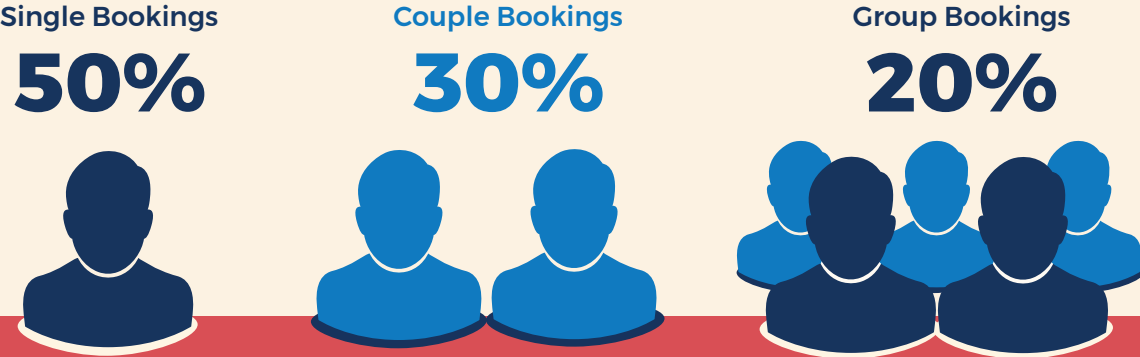
From where are people booking buses?

32%
Metros
Delhi, Mumbai, Chennai, Bangalore, Hyderabad and Kolkata

6%
Other State Capitals
All state capitals and Union Territories other than the 6 Metros

62%
Other Cities
All cities and towns not covered in the above two categories

(redBus data)

ROUTE LENGTHS OF BUS JOURNEYS

Market Trends and Insights

This is indicative of all India bus data, it showcases volume and scale across the industry. These estimates pertain to the full intercity bus market derived from the redBus database and do not pertain only to sales on the redbus platforms. This market estimate is restricted to private bus operators and does not include SRTCs (State Road Transport Corporations)

Occupany by Route Lengths

The occupancy percentage is calculated based on the primary source and destination of the bus service, according to market size estimations.

400-750 Km
82.8%

>750 Km
83.34%

250-400 Km
77.2%

<250 Km
63%

As distance of a route increases, so does the occupancy rate.
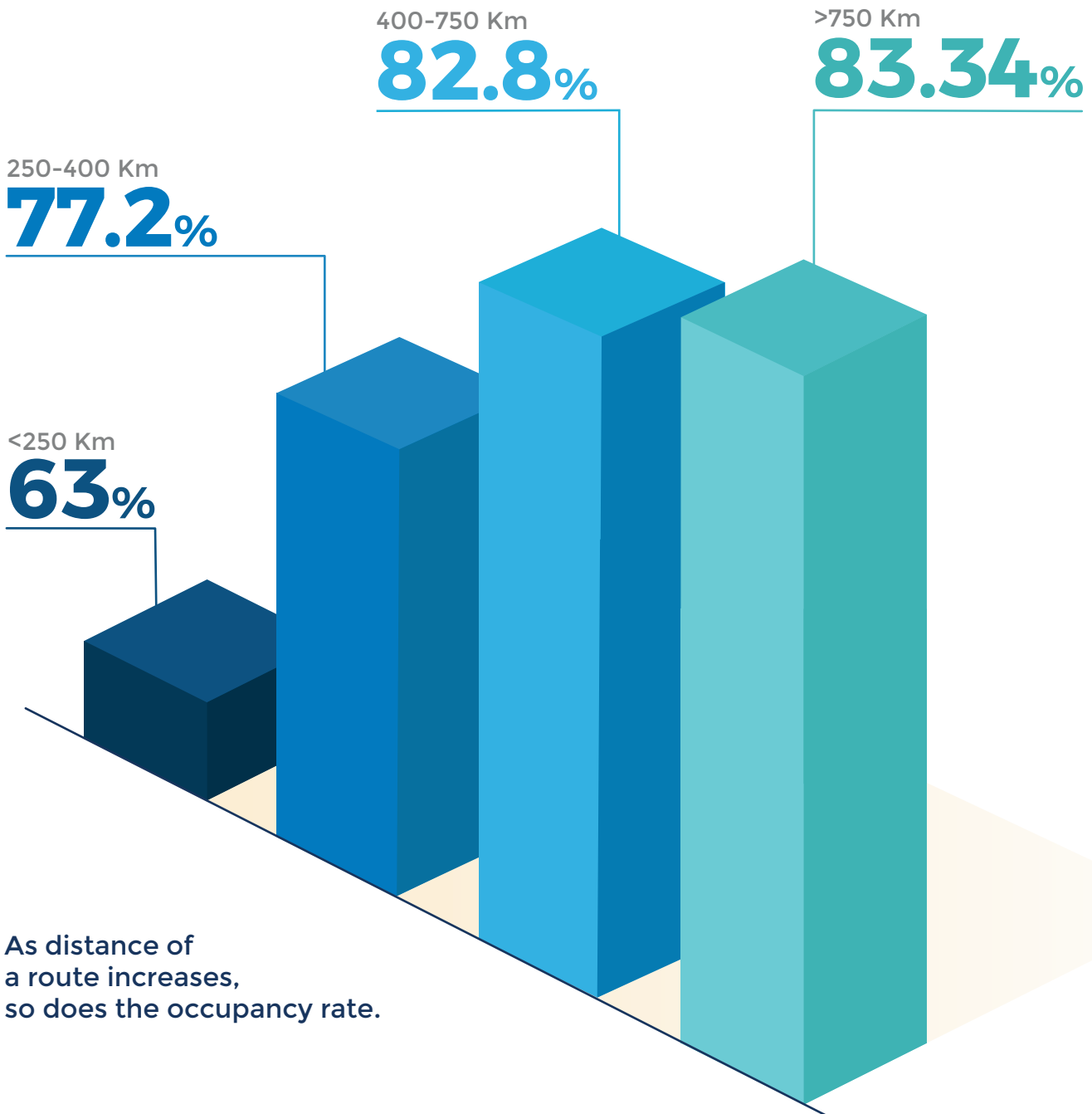
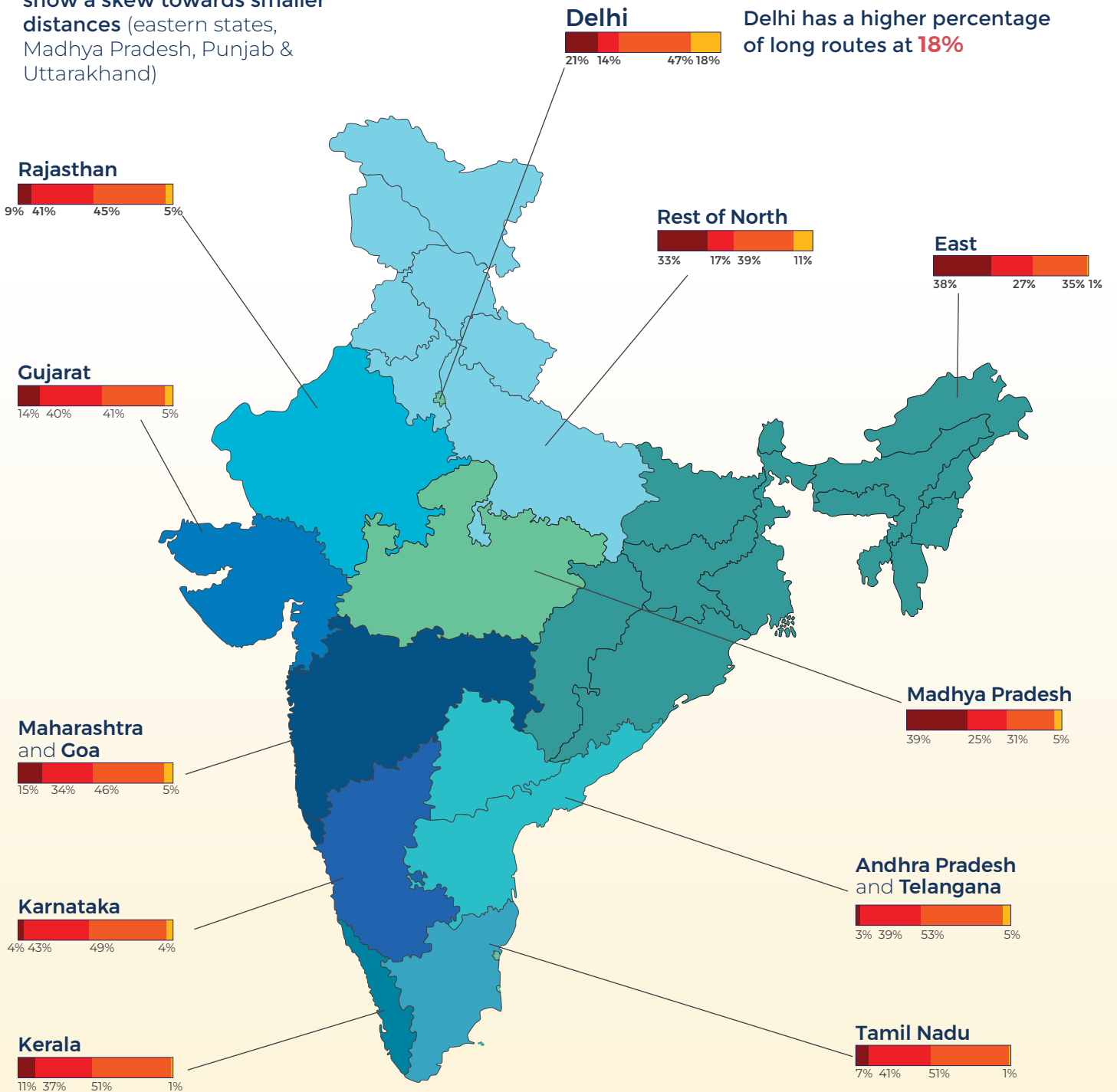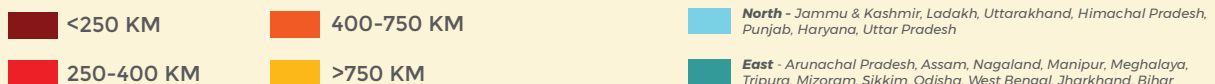# Regions of India by route lengths

This section details data and insights on route lengths, on the redBus platform.
The data pertains to the period from April to June 2024. It represents major travel trends & preferences of travellers across the country. For this data, we have included all via routes; i.e. all stops on a route between starting (source) and ending (destination) points of a bus service have been considered.

While a majority of all seats sold are in the route length of **250-750 Km**, certain markets show a skew towards smaller distances (eastern states, Madhya Pradesh, Punjab & Uttarakhand)

Delhi — 21% 14% 47% 18%

Delhi has a higher percentage of long routes at **18%**

Rajasthan — 9% 41% 45% 5%

Rest of North — 33% 17% 39% 11%

East — 38% 27% 35% 1%

Gujarat — 14% 40% 41% 5%

Maharashtra and Goa — 15% 34% 46% 5%

Madhya Pradesh — 39% 25% 31% 5%

Karnataka — 4% 43% 49% 4%

Andhra Pradesh and Telangana — 3% 39% 53% 5%

Kerala — 11% 37% 51% 1%

Tamil Nadu — 7% 41% 51% 1%

Journeys have been considered with region as a source

<250 KM | 250-400 KM | 400-750 KM | >750 KM

North - Jammu & Kashmir, Ladakh, Uttarakhand, Himachal Pradesh, Punjab, Haryana, Uttar Pradesh

East - Arunachal Pradesh, Assam, Nagaland, Manipur, Meghalaya, Tripura, Mizoram, Sikkim, Odisha, West Bengal, Jharkhand, Bihar

ABOUT redBus

redBus was founded in 2006 in India and today is the world's largest Online bus ticketing platform. After having solved the complex problems of bus customers in India, redBus also launched operations In Singapore, Indonesia and Malaysia in 2015 and acquired a majority stake in Peru-based bus ticketing platform Bus portal (now redBus.Pe) in the subsequent year. With this acquisition, redBus successfully launched operations in Latin America markets, Peru & shortly thereafter, Colombia.

In 2023, redBus launched operations in Cambodia and Vietnam. redBus has globally sold more than 466 million bus tickets to date and has a customer base of around 52 million users. redBus is now part of the MakeMyTrip group (NASDAQ, MMYT) which is the largest travel aggregator in India with offerings across categories such as Flights, Hotels, Holiday Packages, etc. The business owns multiple products - Seat Seller, redPro, YourBus, revMax and rise which come together to serve and address the fragmented bus Industry across geographies.

METHODOLOGY

The India Bus Track report is a quarterly property representing the state of the Indian intercity bus market. It showcases overall industry metrics and reflects travel trends across multiple geographies and consumer segments. Calculations pertain to the full intercity bus market estimated and derived from the redBus database and do not pertain to sales on redBus platforms. Scenarios such as blocked seats, offline seats and service inclusions have been accounted for, to ensure that the validity of the data is not compromised and that the report is a highly robust and reliable indicator of intercity bus travel.

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