



# *redBus* **INDIA BUS TRACK**

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

JULY- SEPTEMBER 2024

# OVERVIEW OF INDIAN BUS INDUSTRY

01

Representation of major trends in the Indian bus industry in July - September 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 July - September 2024

**44.78 Mn**



## Gross Ticketing Value

Transaction value of all the seats sold in July - September 2024

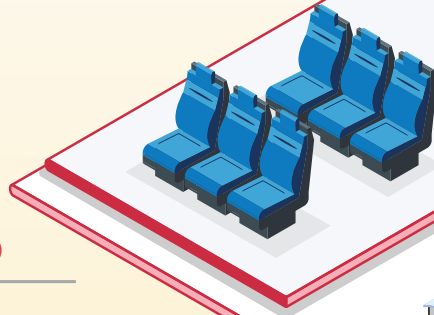
**INR 40.08 Bn**



## Average seat price

(Gross Ticketing Value/ Total seats)

**INR 895**



## Active Pvt Bus Operators

Count of bus operators who have sold at least 1 seat in July - September 2024

**5032**



## CEO's Quote

This edition of the India Bus Track report refers to the July-September period, which is usually a seasonally weaker quarter. This is borne out by the fact that the Average Seat Price (ASP) has dropped to INR 895.

Another interesting thing to note is that supply coverage is expanding, and the number of active private bus operators on redBus has exceeded 5,000 for the first time. Additionally, Tamil Nadu had a robust JAS quarter, with occupancy trending at 81% and its contribution to All India increasing to 15%.

In this instance of the India Bus track report, we have taken an in-depth look at Bus types. The data suggests that preference for travel on sleeper berths is increasing, and travellers are paying a premium of between 45-60% for sleeper travel over seater travel. Bus operators are responding to this by increasing the fleet of sleeper buses and hybrid buses that have a combination of sleeper berths and seats.

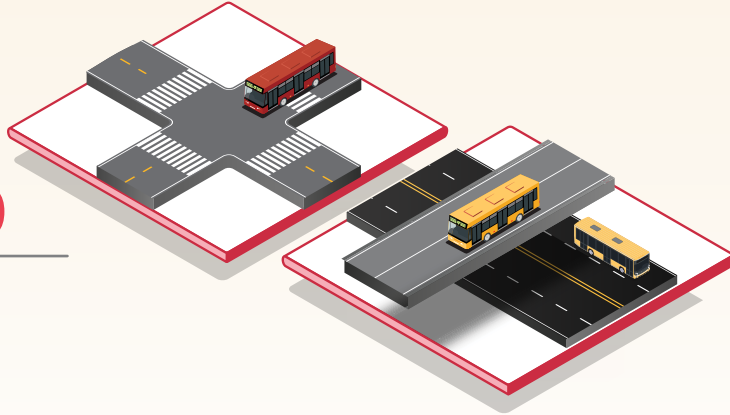


- PRAKASH SANGAM

Representation of major trends in the Indian bus industry in July - September 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).

Unique bus routes in India

**4,94,970**

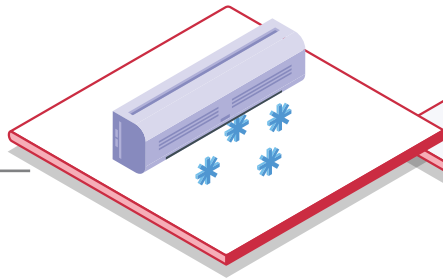


Unique towns connected

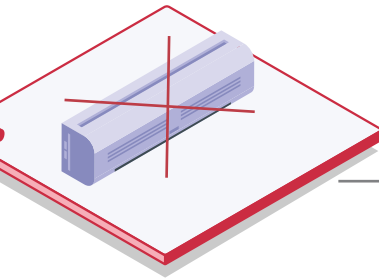
**9,977**

### Journeys split by AC & Non-AC

AC  
**67%**

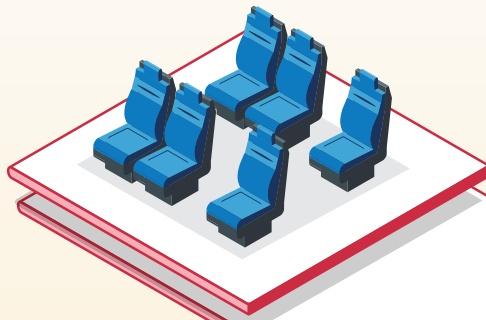


Non-AC  
**33%**

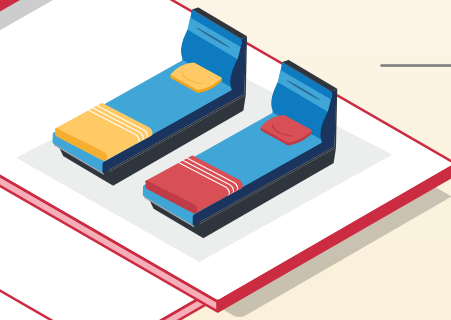


### Journeys split by bus type

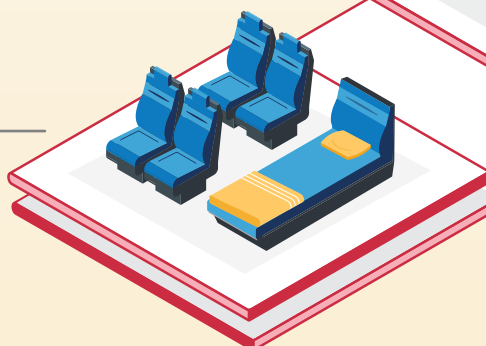
Seater  
**16%**



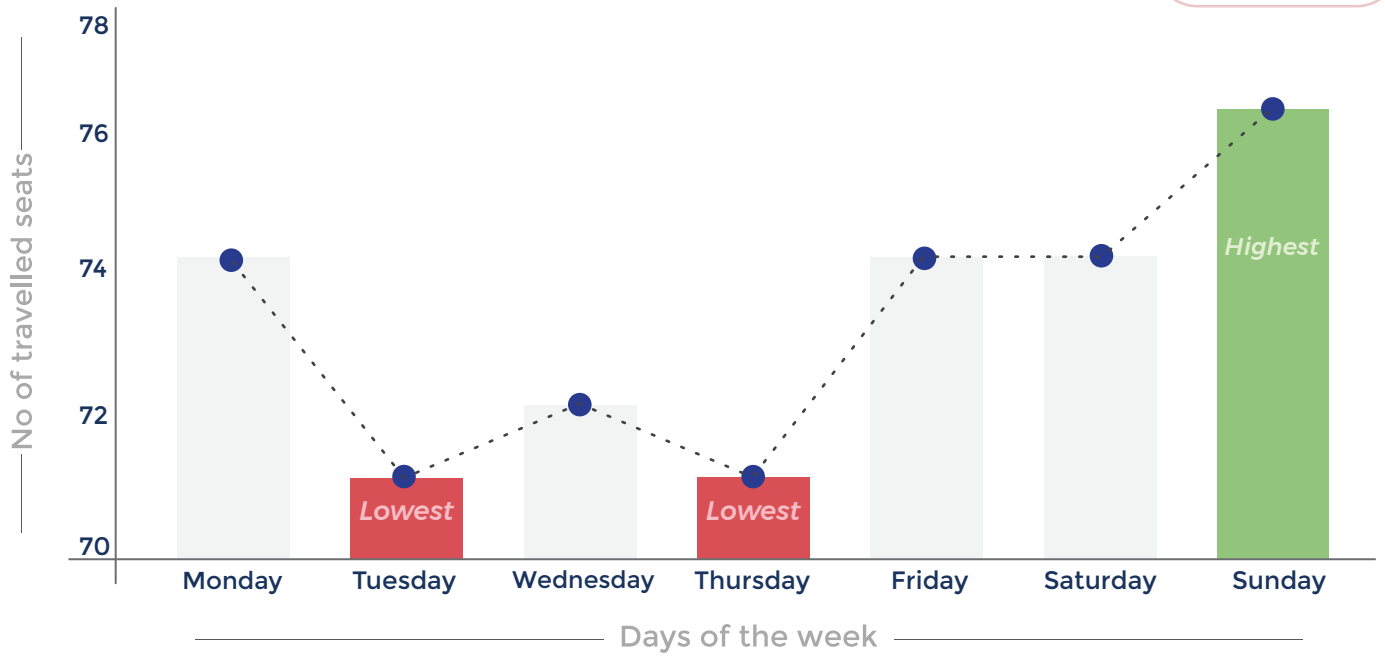
Sleeper  
**51%**



Hybrid  
**33%**



## Bus occupancy trends by day of the week



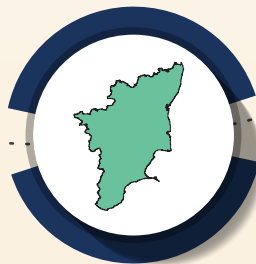
## Bus occupancy trends



All India  
**74%**

Tamil Nadu -  
Highest occupancy

**81%**



Madhya Pradesh  
& Chhattisgarh -  
Lowest occupancy

**61%**



## Split of routes in India

**66%**  
Long Routes

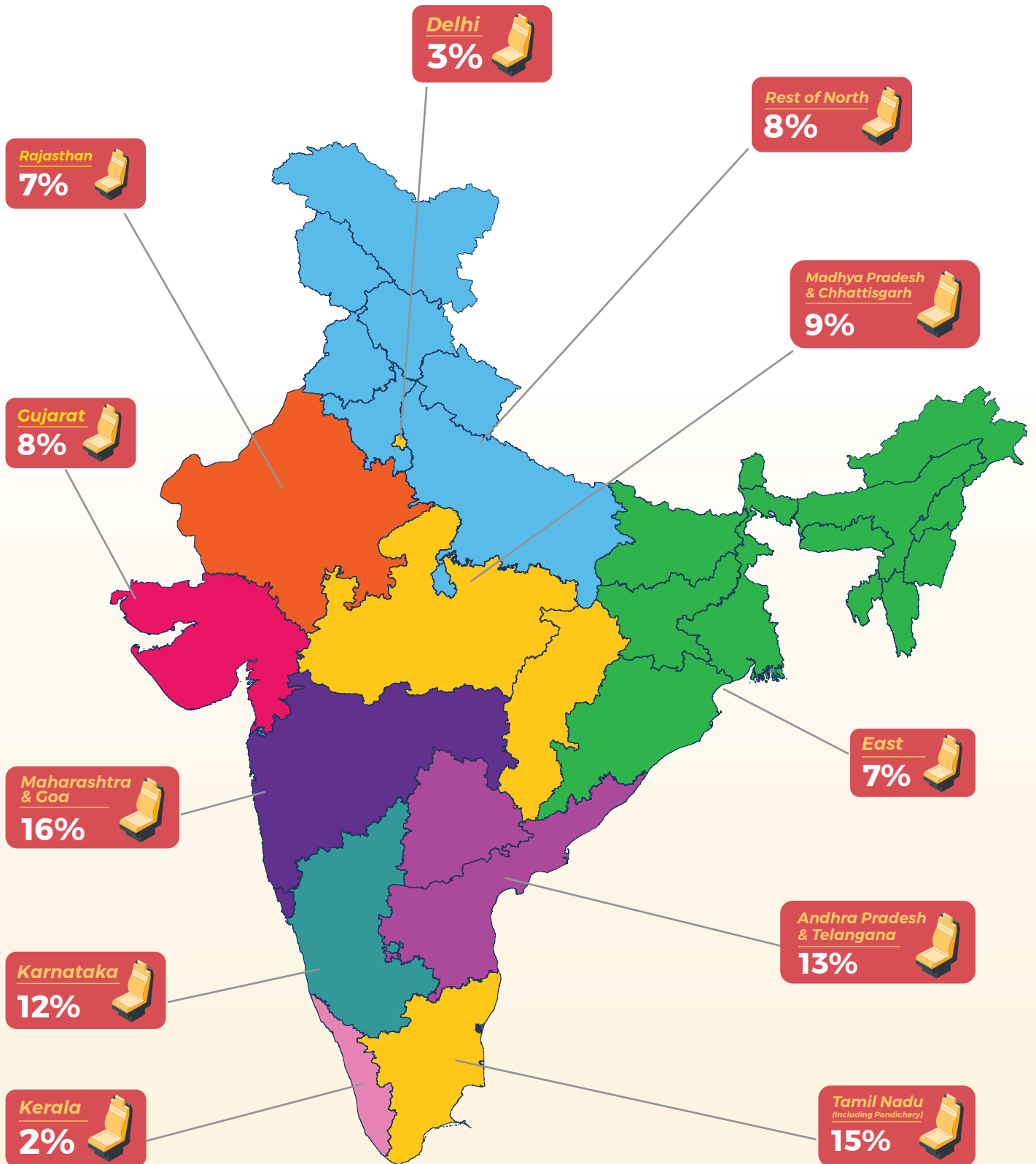
*More than 250 kms*

**34%**  
Short Routes

*Less than 250 kms*

## Seats By Region

This page shows a comparison of different regions in terms of bus seat bookings.



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

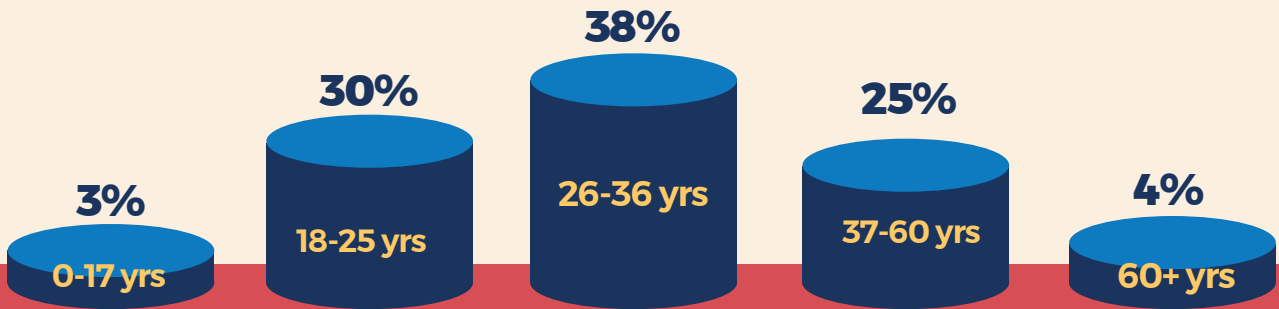
**East** - Arunachal Pradesh, Assam, Nagaland, Manipur, Meghalaya, Tripura, Mizoram, Sikkim, Odisha, West Bengal, Jharkhand, Bihar

# PASSENGER TRENDS FOR BOOKINGS THROUGH REDBUS:

05

This section details out how Indians traveled, showcasing dominant demographic trends In July - September 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



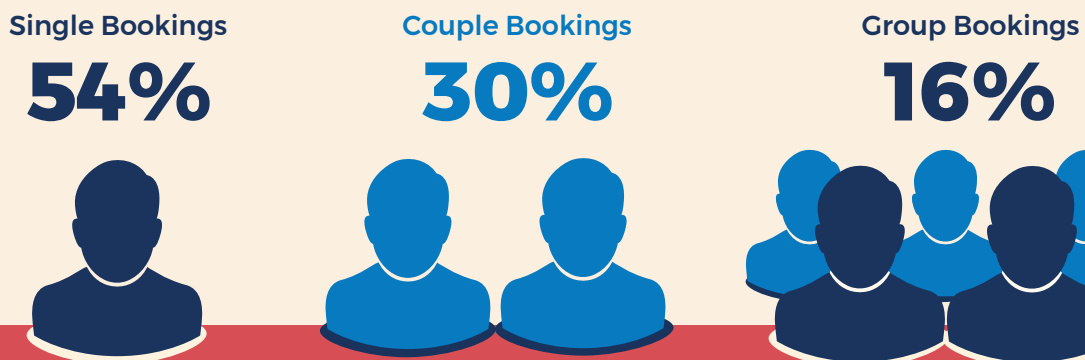
Age of passenger(s) traveling

## GENDER OF BUS PASSENGERS



Gender of passenger(s) traveling

## SINGLE VS. COUPLE VS. GROUP BOOKINGS



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

# GEOGRAPHIC STATISTICS

This section details how Indians traveled, showcasing dominant geographic trends in July - September 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?

### 33%

#### Metros

*Delhi, Mumbai, Chennai, Bangalore, Hyderabad and Kolkata*

### 5%

#### Other State Capitals

*All state capitals and Union Territories other than the 6 Metros*

### 62%

#### Other Cities

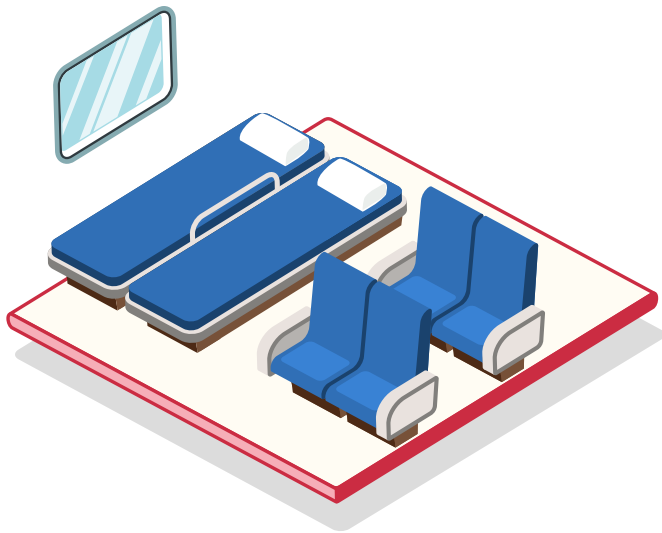
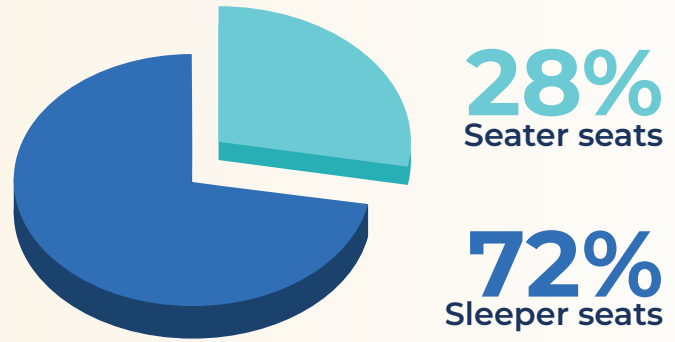
*All cities and towns not covered in the above two categories*



# SEATS IN INDIAN BUSES

This section details how Indians traveled, showcasing dominant geographic trends in July - September 2024. For deeper insights, redBus has highlighted some aspects of its sales. While these approximate overall industry trends, they are not an exact representation.

**Sleeper seats (72%)** have a significantly higher share of sales compared to **Seater seats (28%)**, in the July to September 2024.

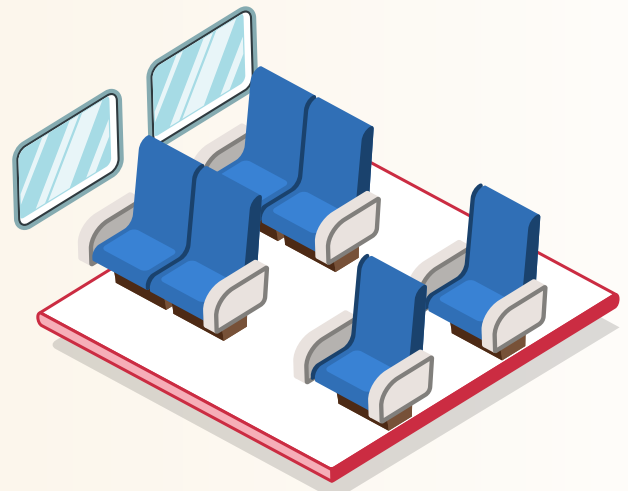


Bus operators are moving towards **Hybrid buses** to cater to both customer types of sleeper and seater seats.

Hybrid buses contribute to **30% of all buses** and they have grown by almost 40% year on year!

For distances less than 250kms, sleeper seats command a price premium of 60% over seater seats.

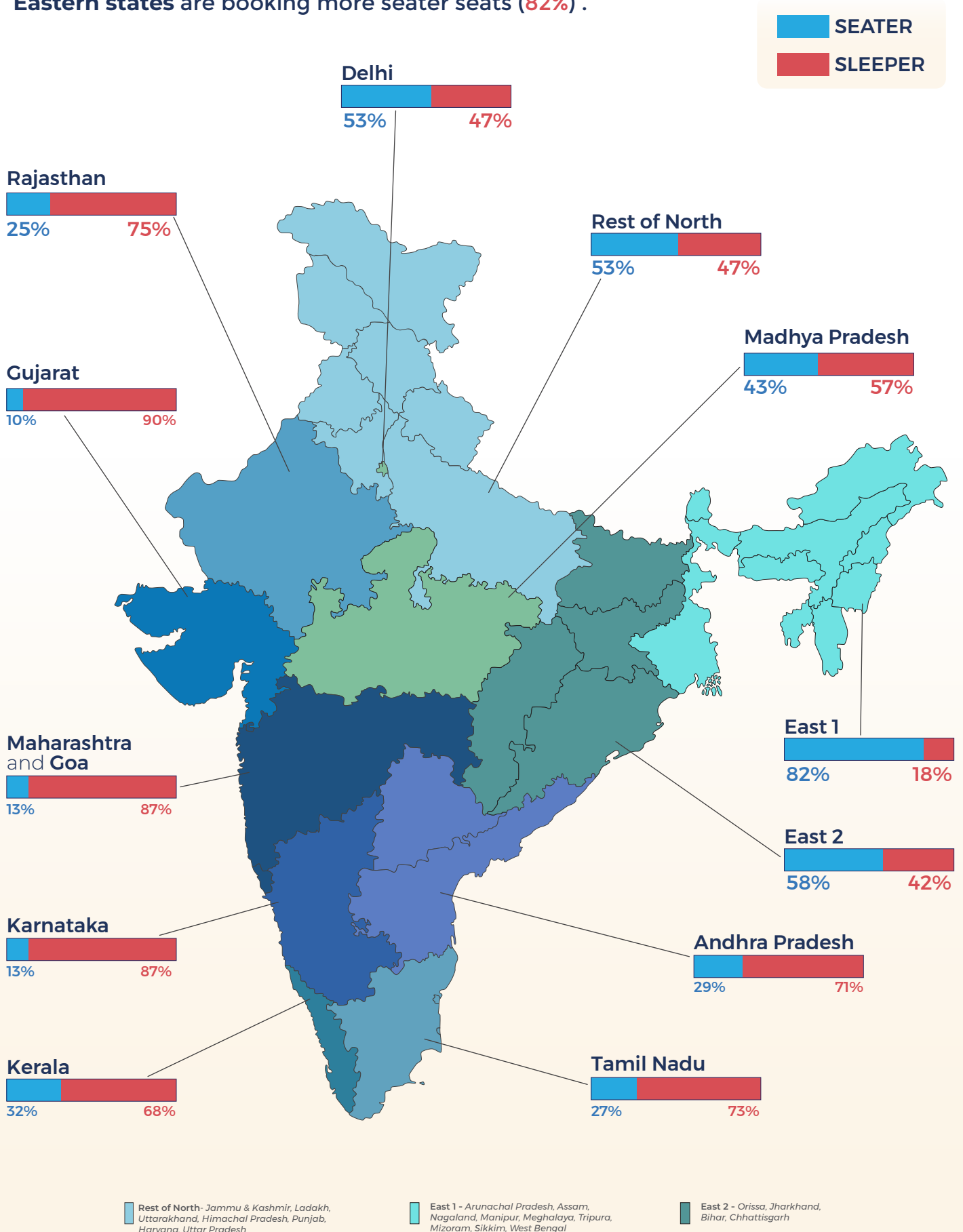
This premium **drops slightly to 45%** for distances more than 250kms





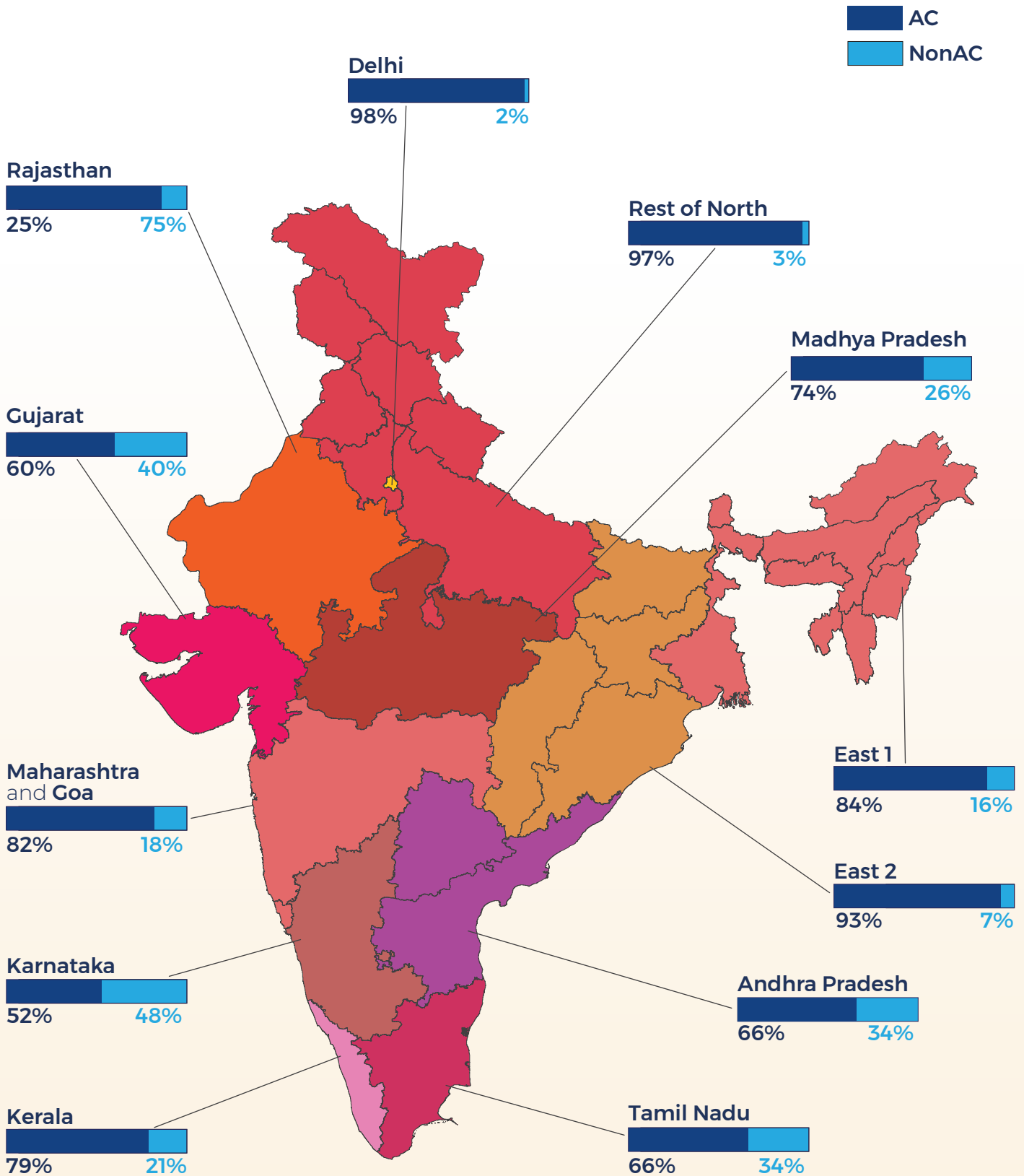
Across markets, Gujarat, Karnataka, Maharashtra and Goa show a **higher share of sales of sleeper seats (86%-90%)**. A possible reason is that more passengers are undertaking inter-state journeys by bus.

By contrast, passengers from **West Bengal and the 7 North Eastern states (82%)** are booking more seater seats.



AC buses have a high share in online sales (70%) and are seeing the highest growth year on year (39%).

Not surprisingly, AC buses are the most booked in northern states of Uttar Pradesh, Punjab, Haryana, UK & HP, and Delhi, with the AC bookings ranging between 97% - 98%



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

East 1 - Arunachal Pradesh, Assam, Nagaland, Manipur, Meghalaya, Tripura, Mizoram, Sikkim, West Bengal

East 2 - Orissa, Jharkhand, Bihar, Chhattisgarh

# ABOUT redBus

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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

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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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