



redBus **INDIA** **BUS** **TRACK**

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

OCTOBER - DECEMBER 2024

OVERVIEW OF INDIAN BUS INDUSTRY

01

Representation of major trends in the Indian bus industry in October - December 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 October - December 2024

58.96 Mn

Gross Ticketing Value

Transaction value of all the seats sold in October - December 2024

INR 58.37 Bn

Average seat price

(Gross Ticketing Value/ Total seats)

INR 990

Active Pvt Bus Operators

Count of bus operators who have sold at least 1 seat in October - December 2024

5240

CEO's Quote

The intercity bus transport sector is witnessing steady growth in India with each passing year. Data from the last quarter throws up some interesting trends and insights about the industry. Q3 is a seasonally strong quarter for the bus industry and it has seen occupancy rates bounce back to 76% and the average seat price to Rs. 990. We have witnessed many more private operators enter the market and therefore the active operator count has exceeded 5,000.

In this edition of the report, we put the spotlight on Tamil Nadu, which is shaping up to be a key growth driver for the industry. The state has shown a steady rise in contribution to travel volumes, which recently reached 13% of overall national travel and continues to grow at a steady pace.

Tamil Nadu is a state with a very high proportion of intrastate travel - contributing to 78% of overall bus travel. When it comes to out-of-state travel, Bangalore contributes a disproportionately large share - roughly two-thirds (~64%). Overall, buses run with a healthy occupancy of 79% in the state.



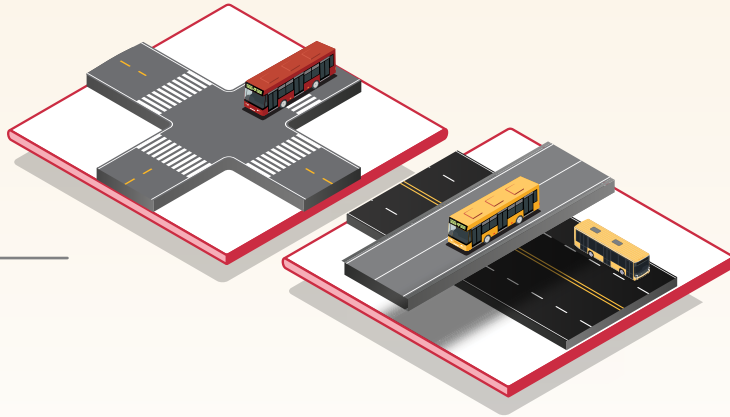
- PRAKASH SANGAM

Representation of major trends in the Indian bus industry in October - December 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 SRTCs (State Road Transport Corporations).

02

Unique bus routes in India

521,006



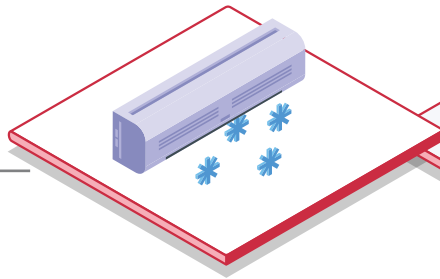
Unique towns connected

10,215

Journeys split by AC & Non-AC

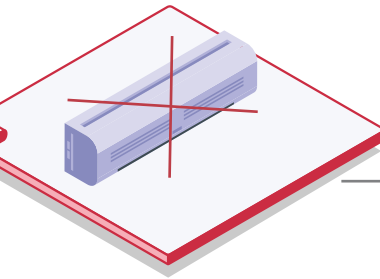
AC

67%



Non-AC

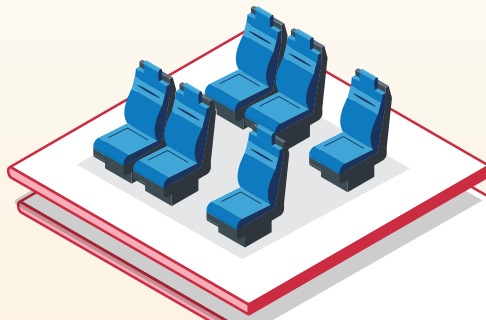
33%



Journeys split by bus type

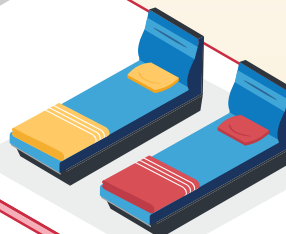
Seater

16%



Sleeper

51%

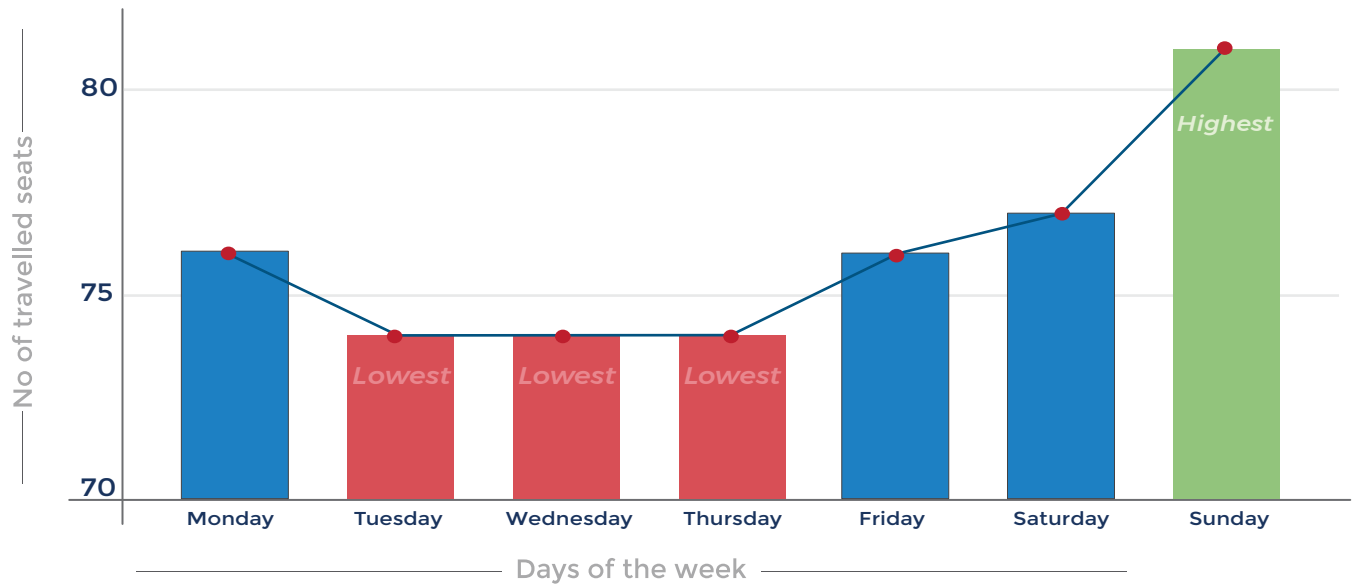


Hybrid

33%



Bus occupancy trends by day of the week



Bus occupancy trends



All India
76%

Andhra Pradesh +
Telangana -
Highest occupancy

83%



Madhya Pradesh
& Chhattisgarh -
Lowest occupancy

63%

Split of routes in India

66%
Long Routes

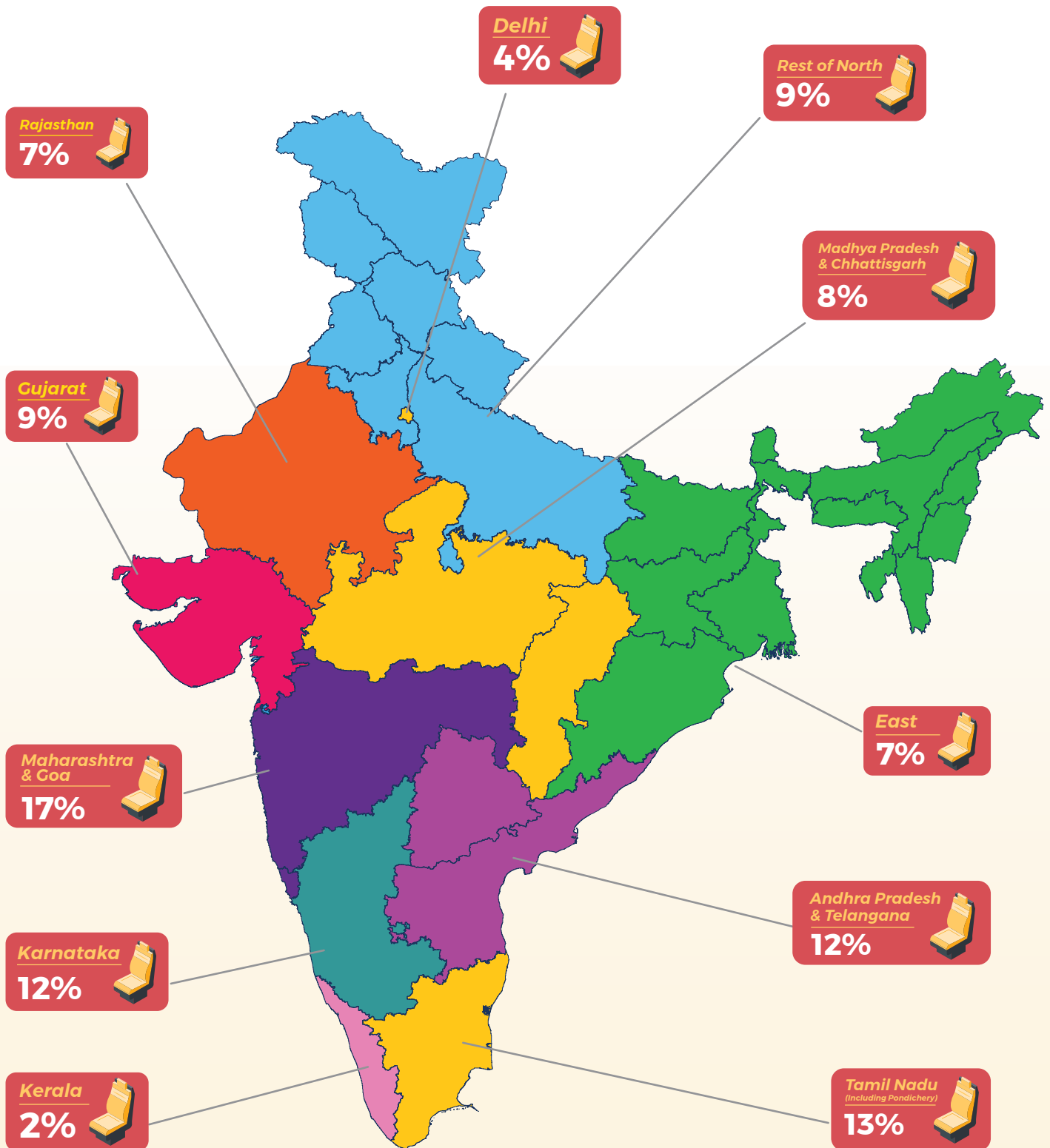
More than 250 kms

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

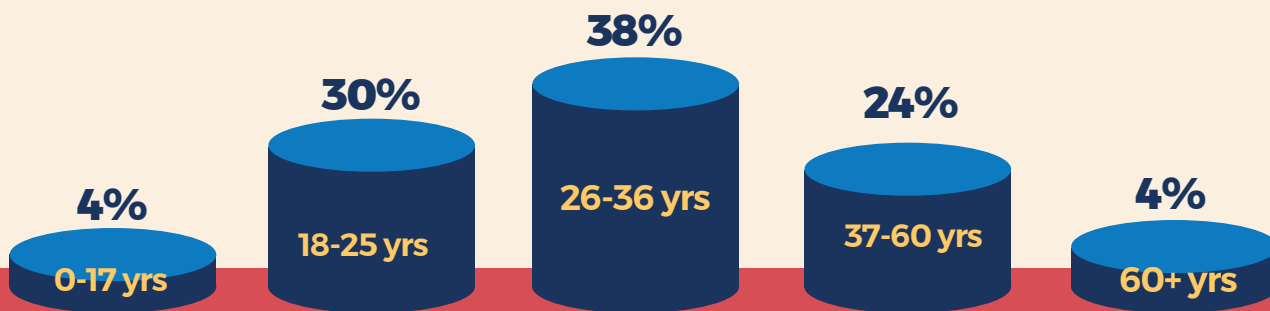
East - Arunachal Pradesh, Assam, Nagaland, Manipur, Meghalaya, Tripura, Mizoram, Sikkim, Odisha, West Bengal, Jharkhand, Bihar

PASSENGER TRENDS FOR BOOKINGS THROUGH REDBUS:

05

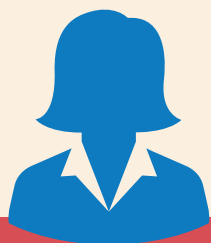
This section details out how Indians traveled, showcasing dominant demographic trends In October - December 2024. For deeper insights, redBus has highlighted some aspects of its sales. While these approximate overall industry trends, they are not an exact representation.

AGE OF BUS PASSENGERS

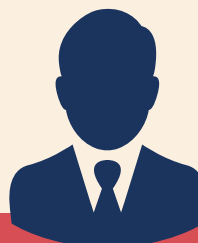


Age of passenger(s) traveling

GENDER OF BUS PASSENGERS



Females
34%



Males
66%

Gender of passenger(s) traveling

SINGLE VS. COUPLE VS. GROUP BOOKINGS

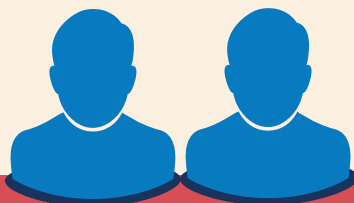
Single Bookings

53%



Couple Bookings

30%



Group Bookings

17%



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

GEOGRAPHIC STATISTICS

06

This section details how Indians traveled, showcasing dominant geographic trends in October - December 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

6%

Other State Capitals

All state capitals and Union Territories other than the 6 Metros

61%

Other Cities

All cities and towns not covered in the above two categories



(redBus data)

State in spotlight:

TAMIL NADU

07

This page showcases major trends in the Tamil Nadu bus industry from October to December 2024. To gain deeper insights, redBus has highlighted some aspects of its sales in Tamil Nadu; therefore while these approximate overall bus trends in Tamil Nadu, it is not an exact representation. This estimate is restricted to private bus operators and does not include the State Road Transport Corporation of Tamil Nadu.

A majority of the bus travel in Tamil Nadu happens **within the state**.

- Within **state travel** accounts for **78%** of the travel and out of state travel accounts for **22%** of the travel
- **Chennai, Coimbatore, Madurai, Tiruchirapalli, Salem, Hosur** account for a bulk of the travel
- Bangalore accounts for a significant portion of **out of state travel** (14%)

On average, buses run at **79% occupancy** in Tamil Nadu.

Average ticket price for bus journeys in Tamil Nadu is **INR 967**

October to December is the season for festive travel.

Interestingly the highest number of seats were booked in **December** & the second highest bookings were made in **November**.



Top pilgrimage sites in Tamil Nadu:

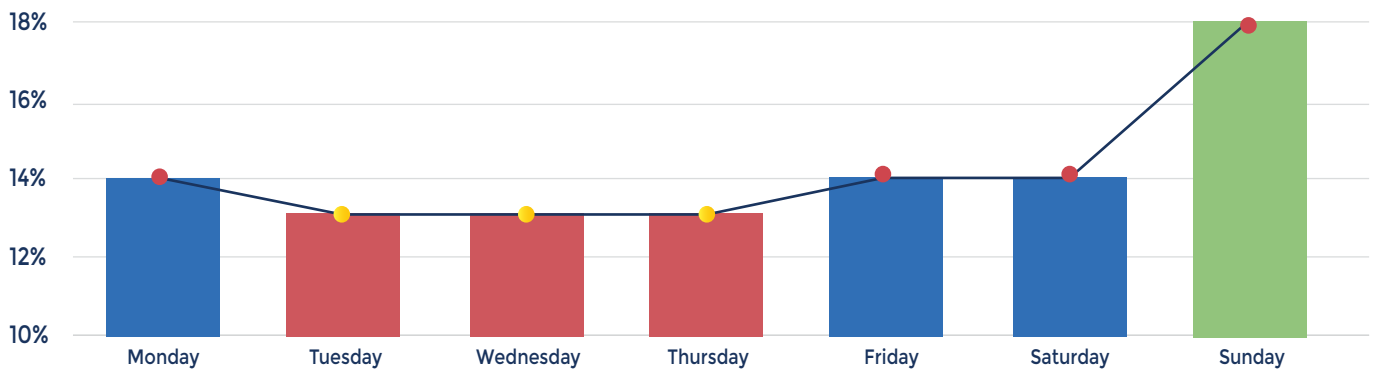
Madurai, Nagercoil, Tiruchendur, Thanjavur, Kumbakonam, Tiruvannamalai, Rameswaram, Marthandam, Velankanni, Palani, Chidambaram, Mayiladuthurai, Kanchipuram, Kanyakumari



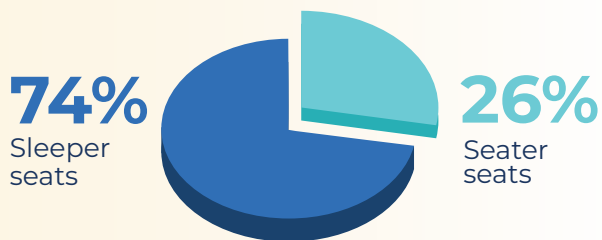
Priorities for passengers in Tamil Nadu are:



Break-up of travel by days of the week:



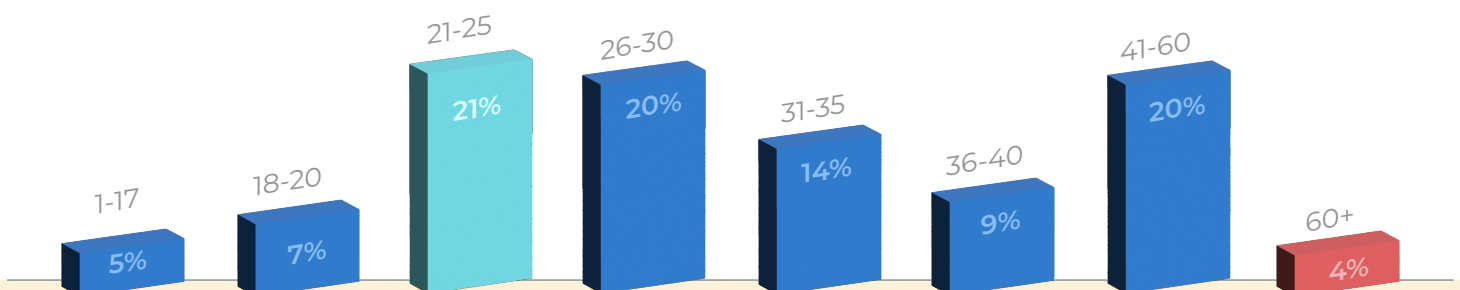
Comparison of Seater seats to Sleeper seats bookings:



Gender break up of bus passengers:



Age breakdown of bus passengers:



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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