



Government Run Intercity Buses -

A CUSTOMER SURVEY

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*Passenger sentiment about
Government run Intercity
Bus services*

PASSENGER SENTIMENT ABOUT GOVERNMENT RUN INTERCITY BUS SERVICES:

A redBus Survey

CEO's Quote



Prakash Sangam
Chief Executive Officer (CEO)



State-run buses remain a vital part of how India travels, connecting people to their families, hometowns, and festive celebrations.

This survey reaffirms the trust passengers place in RTCs for their affordability and ability to reach every corner of the country, while also highlighting areas for improvement. At redBus, we are committed towards bringing customer voices to light while working closely with state transport corporations to address these needs, ensuring every journey is reliable, comfortable, and offers true value for passengers.

About the Report

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The objective of this survey was to measure sentiments among consumers regarding government owned intercity bus services

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redBus ran a voluntary, free survey on its app and through mailers to its customer base. The objective of this survey was to measure sentiments among consumers regarding government owned intercity bus services (also called RTC / ST / STU / Roadways).

The survey ran from June till August 2025, to redBus' existing customer base across India. The survey includes responses from both, passengers who use government owned intercity bus services (to be called 'RTC' from here on) as well as those who do not. The survey consists of the responses of 11,161 respondents (Males: 7377; Females: 2475).

All responses were anonymous. This survey was not authorised by and was not being undertaken in partnership with or on behalf of any STU, Road Transport Authority or RTC . It was an independent market research exercise undertaken by redBus, solely for the purpose of research. The survey had both, multiple choices as well as the options for open ended answers, and the option order was randomised. Qualitative and quantitative responses have been considered in this survey. Respondents selected an RTC for a specific state and proceeded to answer regarding one specific RTC.



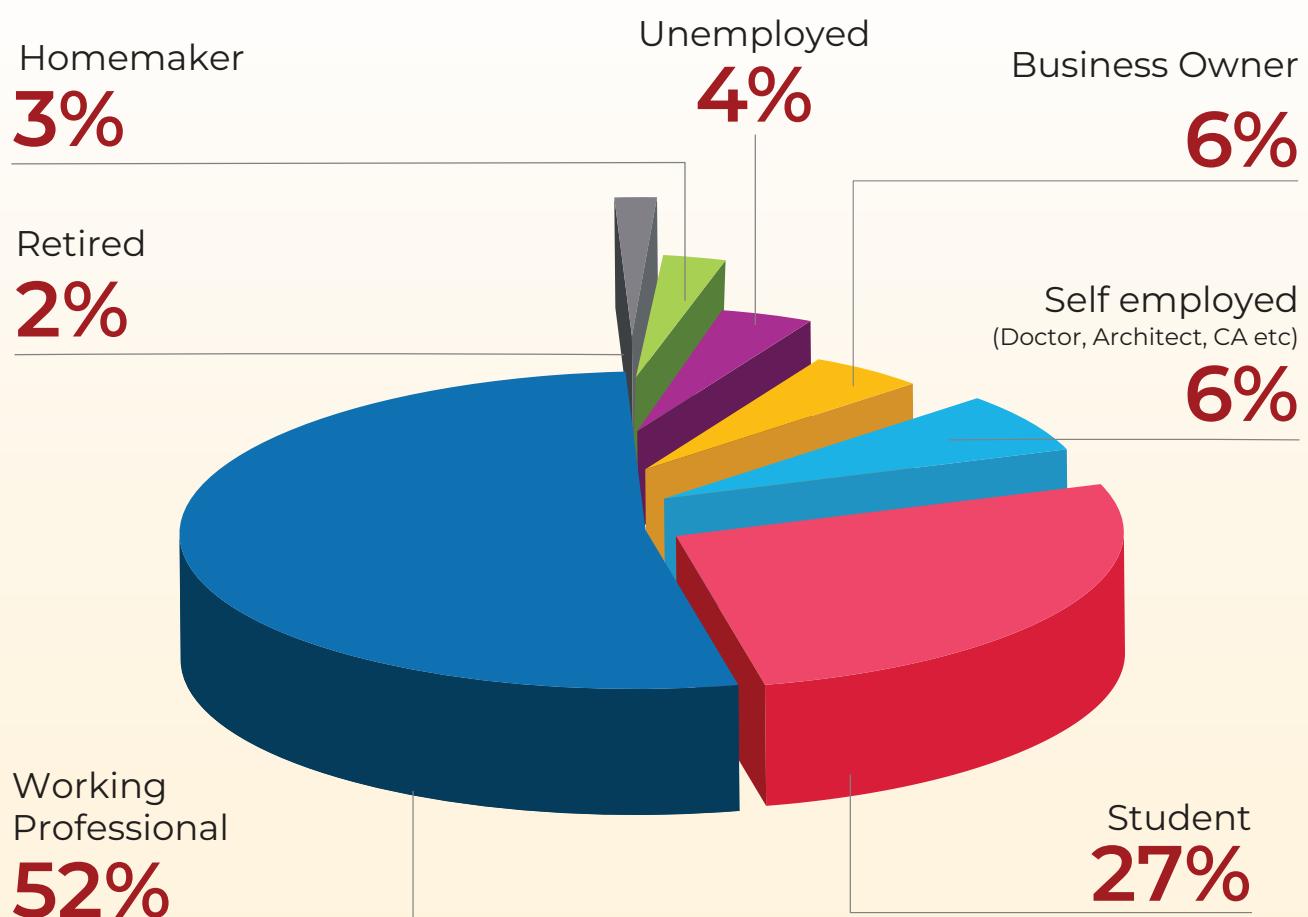
01

FINDINGS OF THE RTC SURVEY

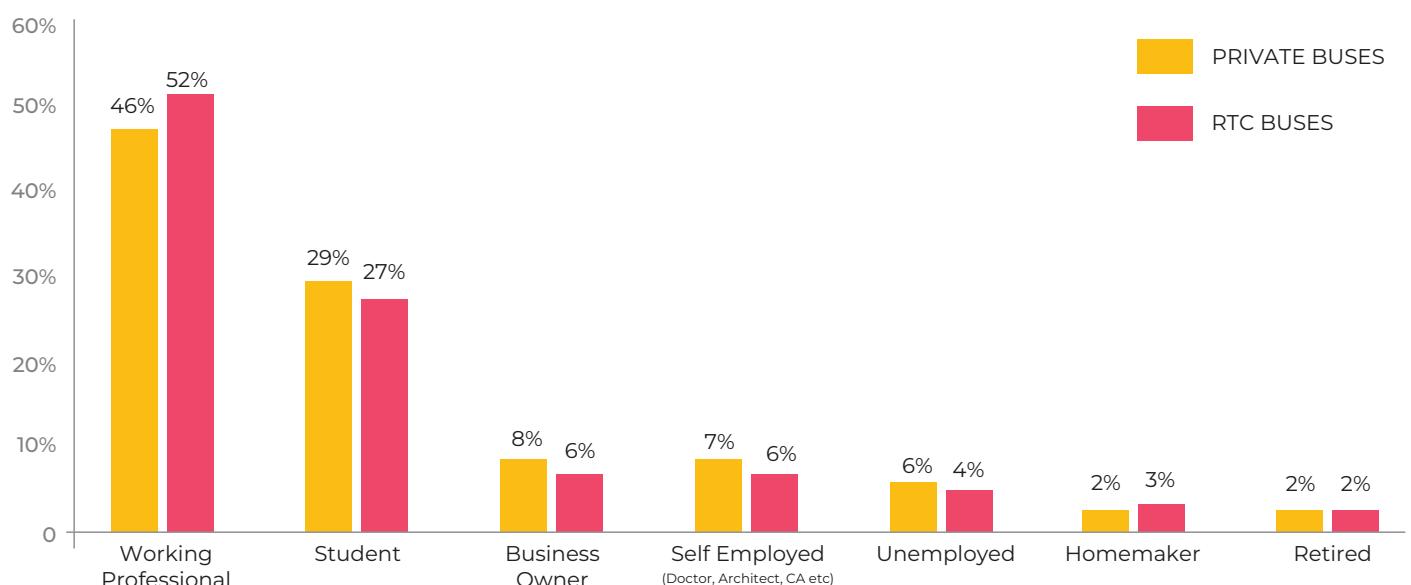
Who took the Survey?

In this segment we present an overview of who the customers using RTCs are. Based on this, we build further insights.

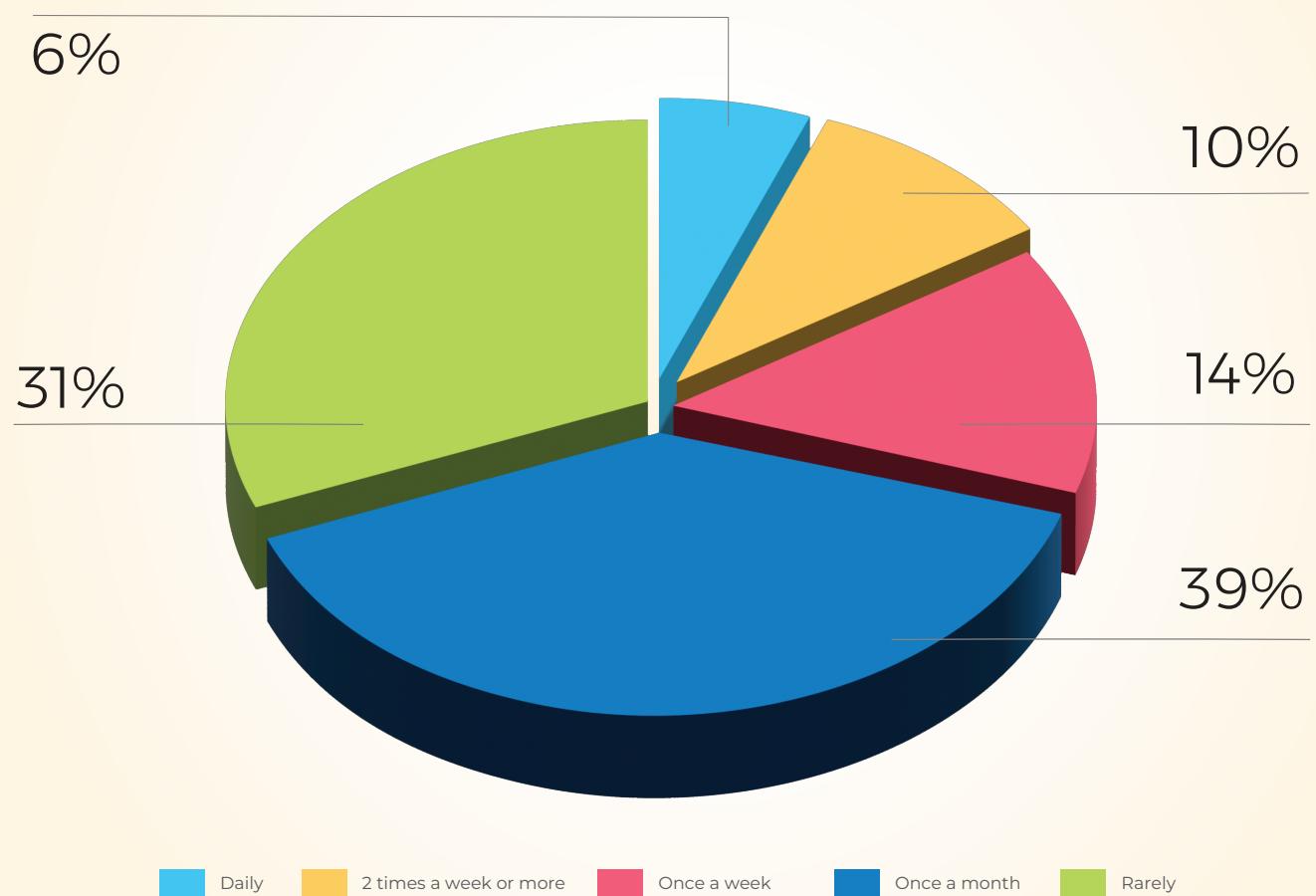
Occupation split of RTC Users



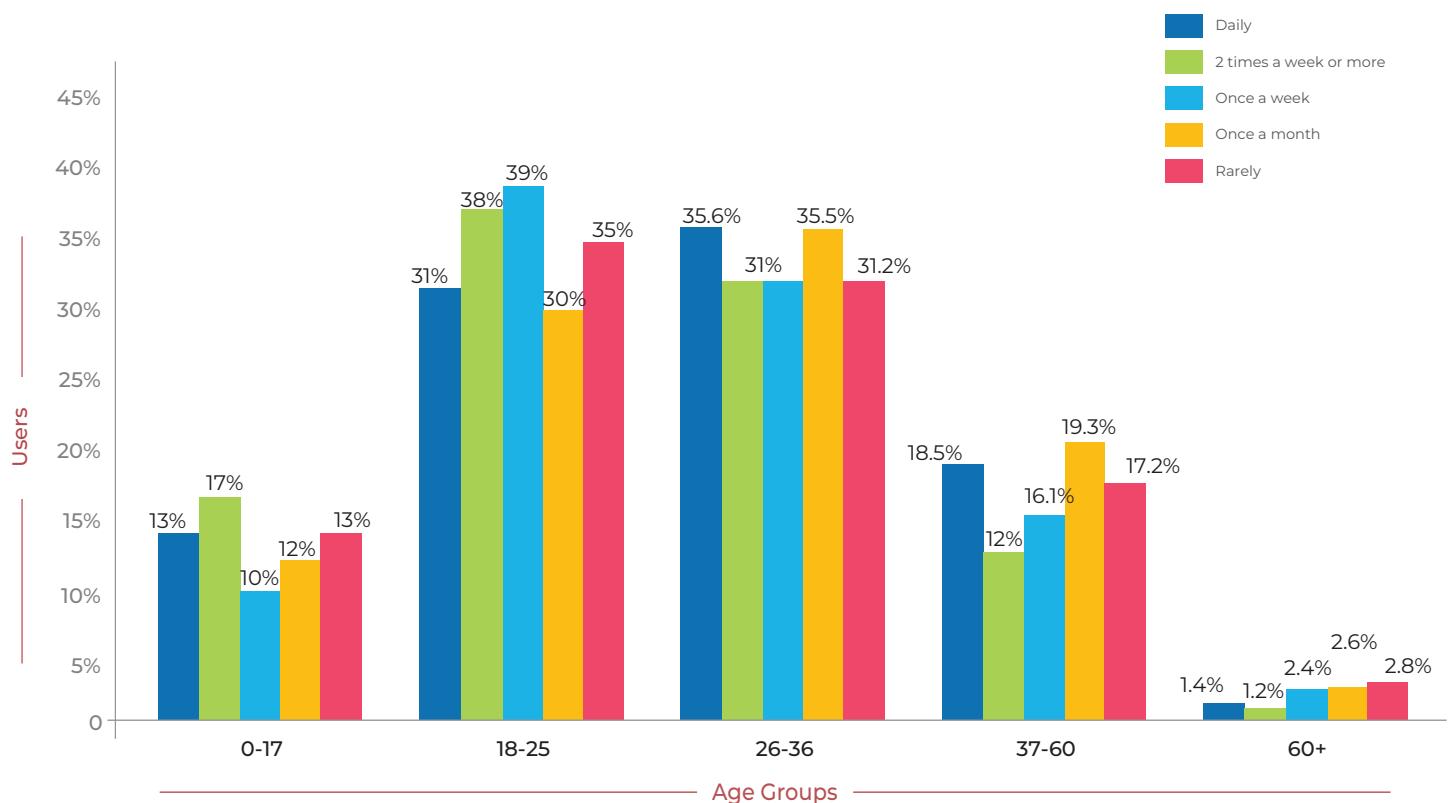
Comparison of occupation split with private bus usage



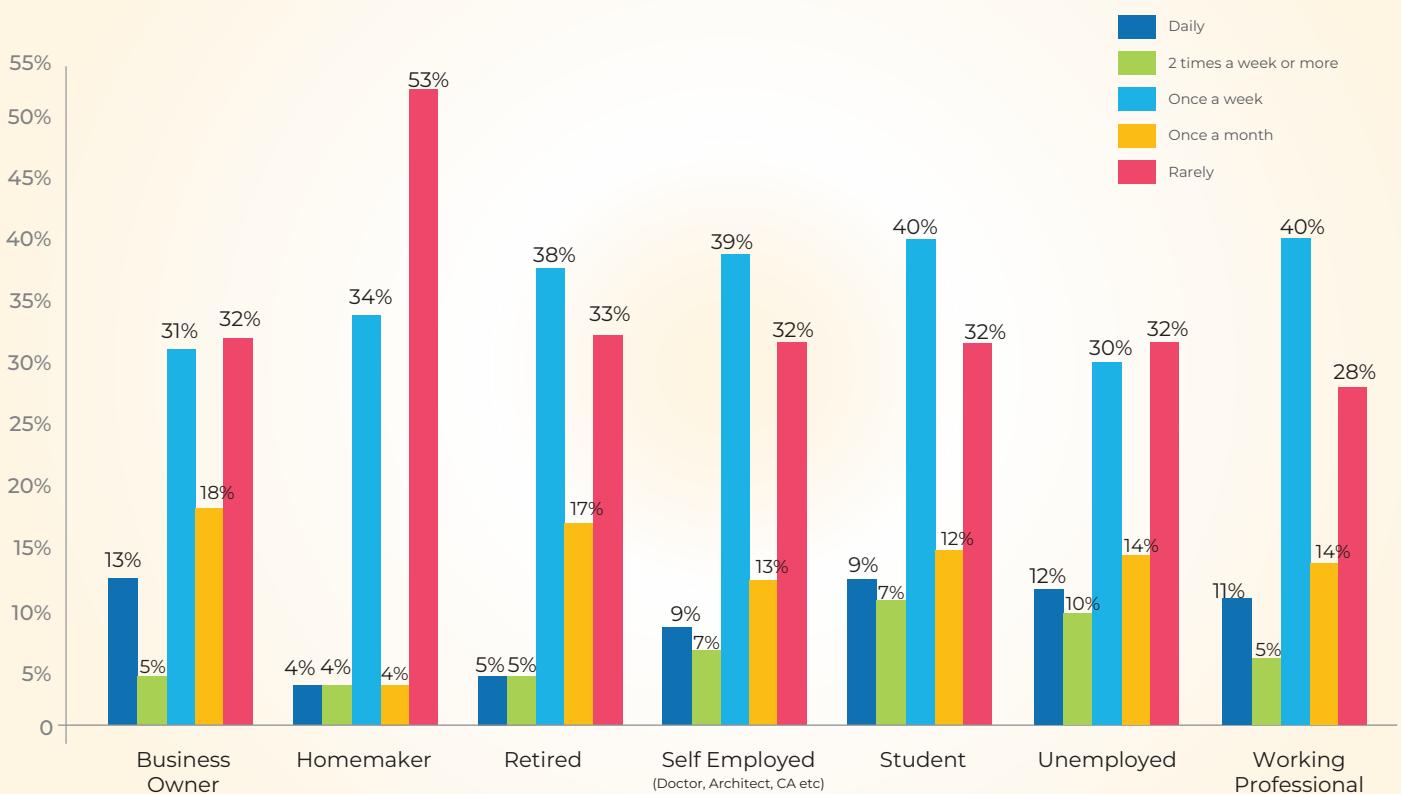
How often do respondents travel by RTC buses?



Travel frequency as a function of age



Travel frequency as a function of occupation



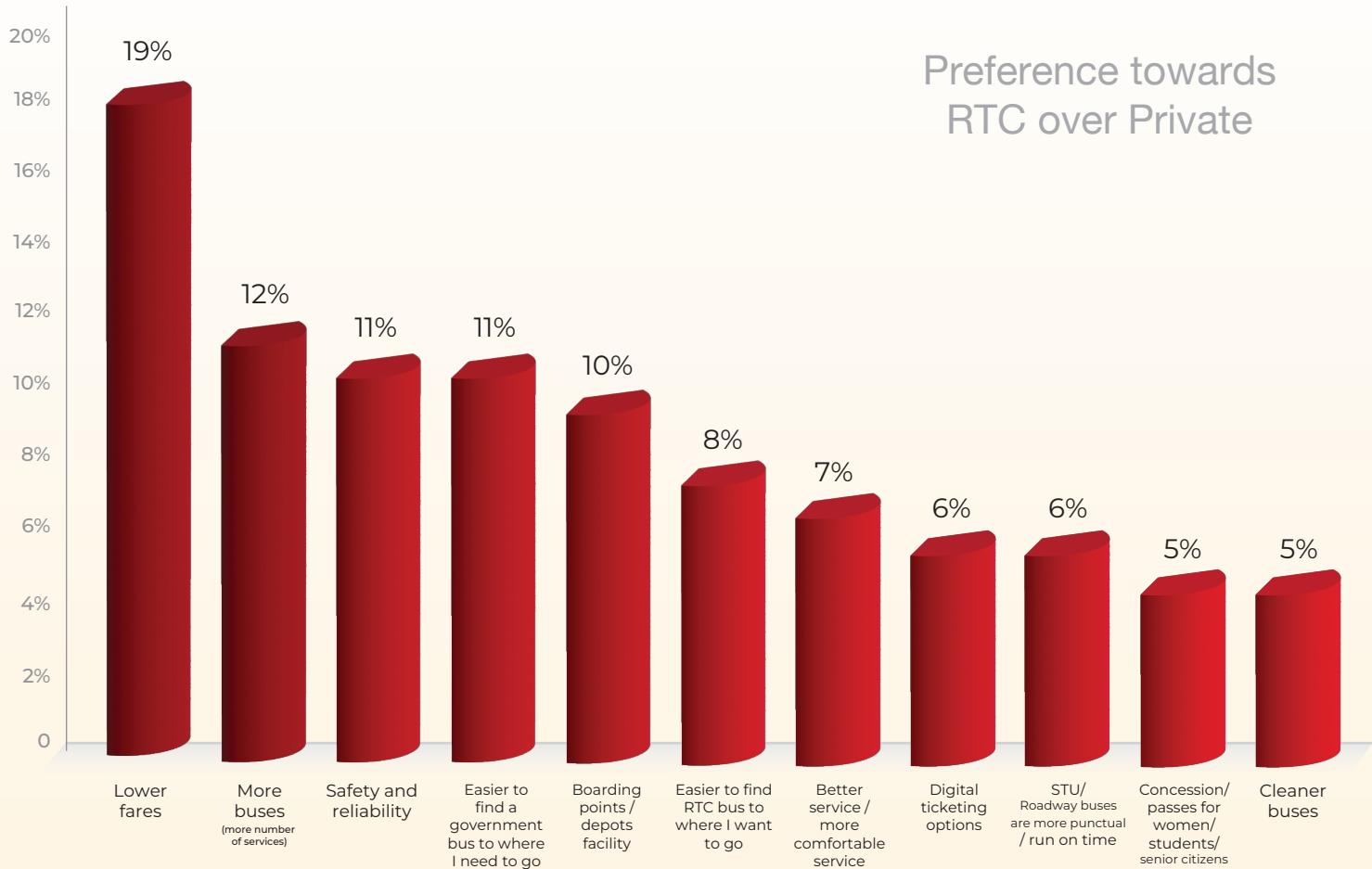
02

INSIGHTS

Why Passengers prefer RTCs

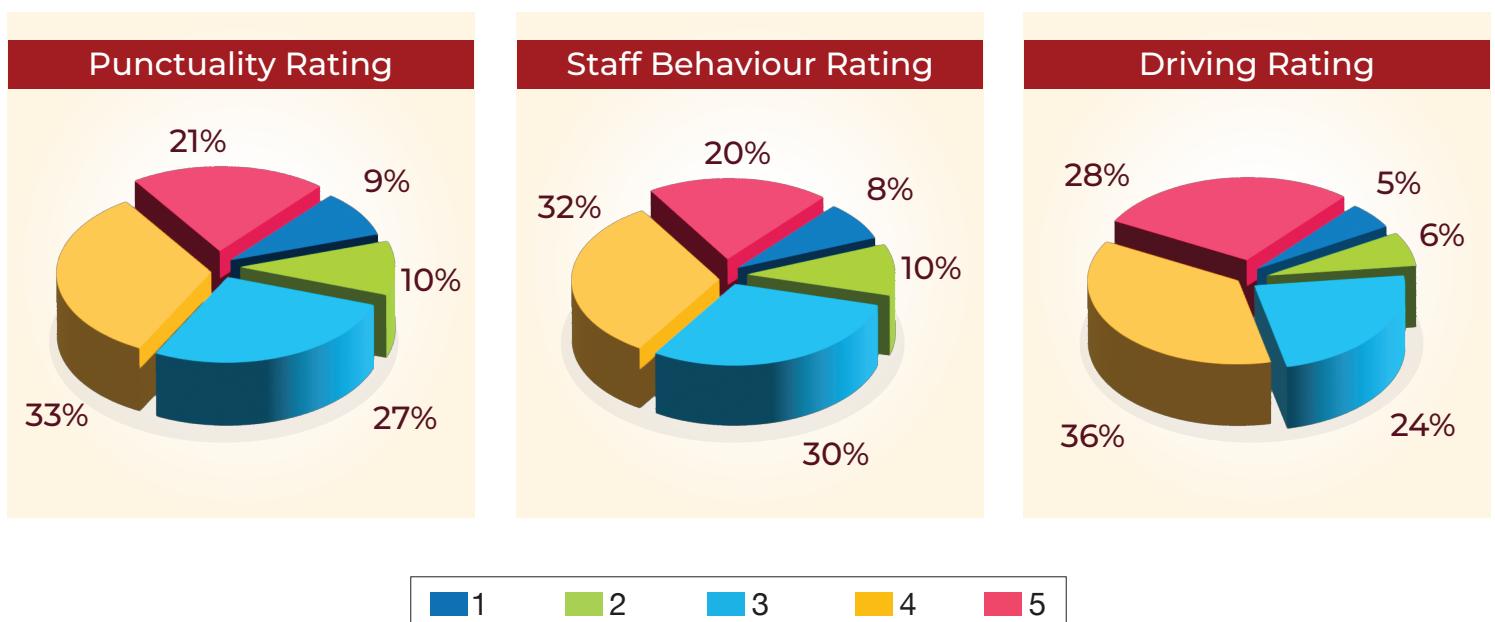
- Not surprisingly, 19% of people report '**lower fares**' as a key USP of RTCs
- Better connectivity** is an important USP of RTCs, with 33% of people listing reasons like more services, **boarding points and depots close to home** as key reasons.

Reasons RTC buses are preferred



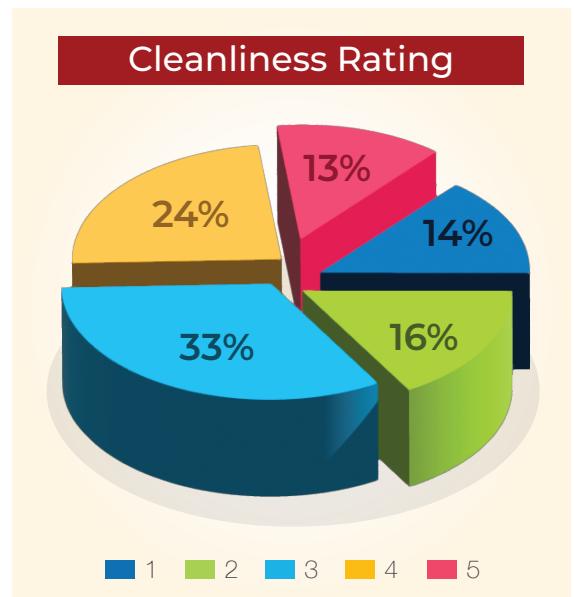
Rating of RTCs on key parameters

- RTCs are highly rated on punctuality, driving, and staff behaviour, with more than **50% of users rating them 4/5 or higher**.
- For driving, punctuality, and staff behaviour, **Men and women express the same levels of satisfaction/dissatisfaction**.



However one major area of improvement is cleanliness where **30% of respondents give a low rating (1 or 2 out of 5)**

- 11% of respondents said they would like '**cleaner buses**' when asked what changes they would like for RTCs.
- For cleanliness, **women travellers express slightly higher levels of dissatisfaction** (66% rate RTC buses 1/2/3 out of 5) than men (63% rate 1/2/3 out of 5)
- **25% of women** and **24% of men** said that cleanliness was an issue with RTCs

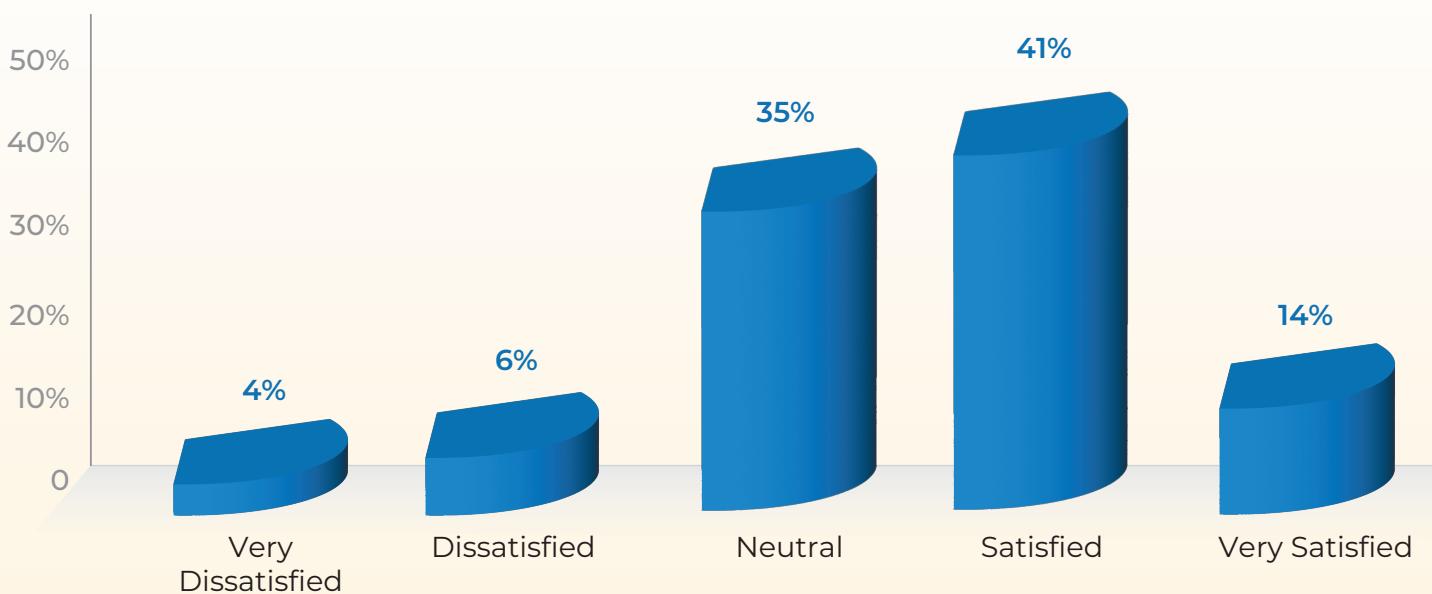


03

Satisfaction with RTC travel experiences

- **55% of respondents** are satisfied or very satisfied with RTC bus experience
- Overall, **27% of RTC users are students**, but the dissatisfaction level among this cohort is higher than any other age group. Some of the top reasons for dissatisfaction expressed by this group in our surveys were: **Unavailability/frequency, punctuality, too crowded, accessibility and poor last-mile connectivity.**
- Overall, men and women express **similar levels** of satisfaction
- Approximately **50%** of men and women rated **overcrowding and hygiene** as major issues with RTCs.

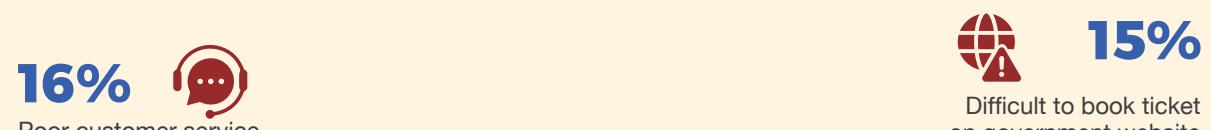
Satisfaction with RTC travel experience



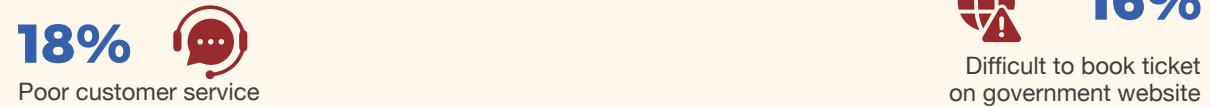
Satisfaction with RTC as a function of age



Top issues with RTC buses for Female and Male passengers



Female



Male

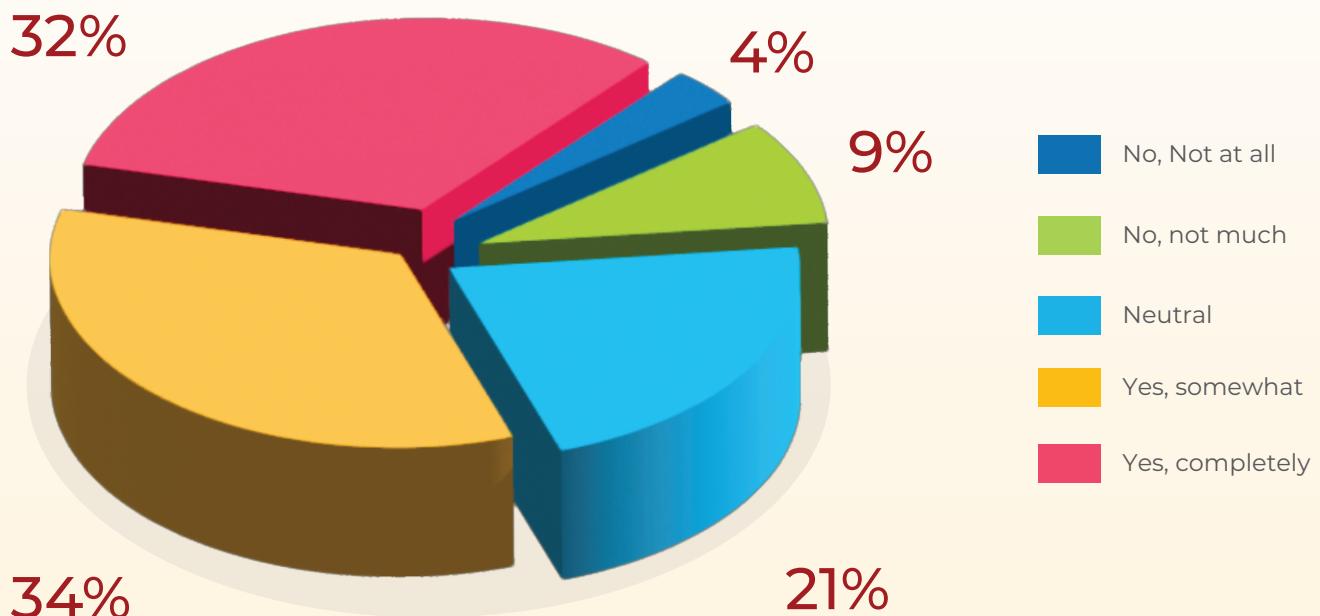


04

Do RTCs provide value for money?

- A significant proportion of users do not find RTCs value for money (34%). This segment is probably most susceptible to **switch to private buses** or use RTC and private alternatively.
66% of RTC users find the services value for money.
- Out of all the respondents, students and unemployed cohorts showed highest dissatisfaction. Perhaps **students expect discounts** (similar to within city bus discounts)
- 35% of students expressed **a desire for student concessions**

Are RTC buses value for money?



Satisfaction levels by occupation



Business Owner

👍 70% 👎 12%

👍 Overall satisfied
👎 Overall dissatisfied



Homemaker

👍 67% 👎 10%



Retired

👍 70% 👎 10%



Self Employed (Doctor, Architect, CA etc)

👍 66% 👎 12%



Student

👍 62.9% 👎 14%



Unemployed

👍 58% 👎 18%



Working Professional

👍 68% 👎 11%

05

Why people don't use RTCs

- A majority of the RTC users are Working Professionals (52%) and Students (27%)
- For students, availability, convenience, and punctuality are the most critical factors
 - RTC buses are **not available/frequent** in their area
 - Prefer using **college/own transport** (bike, scooter, cycle)
 - Buses are **not punctual or reliable**
- For working professionals who constitute 52% users, the top reasons are punctuality
 - RTC buses are **not punctual / frequent delays**
 - **Bus timings don't align** with office hours
 - Prefer own vehicle or cabs for **flexibility**

Qualitative responses show that it is not just delays which are an issue, but there is a lack of updates/ Information about the delay. I.e. **tracking is an issue**. 80% of buses have tracking, but this is less than 10% for RTCs. 10% of respondents said tech enabled improvements like '**live tracking**' is a feature they would want to see on RTC buses.



Broad suggestions of working professionals and students who do use RTCs:



Overall Users

A mix of needs across **comfort, reliability, and coverage**. No single dominant concern.



Students

Emphasize **affordability (passes), college-time frequency, and better connectivity to campuses**.



Working Professional

Strong focus on **timing, comfort, AC buses, and digital booking**. Need efficient daily commute.

Broad concerns of working professionals and students who don't use RTC:



Overall Users

Broad mix of concerns; **punctuality, comfort, and availability** are universal issues.



Students

RTC often doesn't operate **near home/college**, and they **prefer college/private transport** due to unavailability, **lack of awareness**, or inconvenience.



Working Professional

Highly sensitive to **timing, comfort (AC), & flexibility**; prefer cabs or personal vehicles.

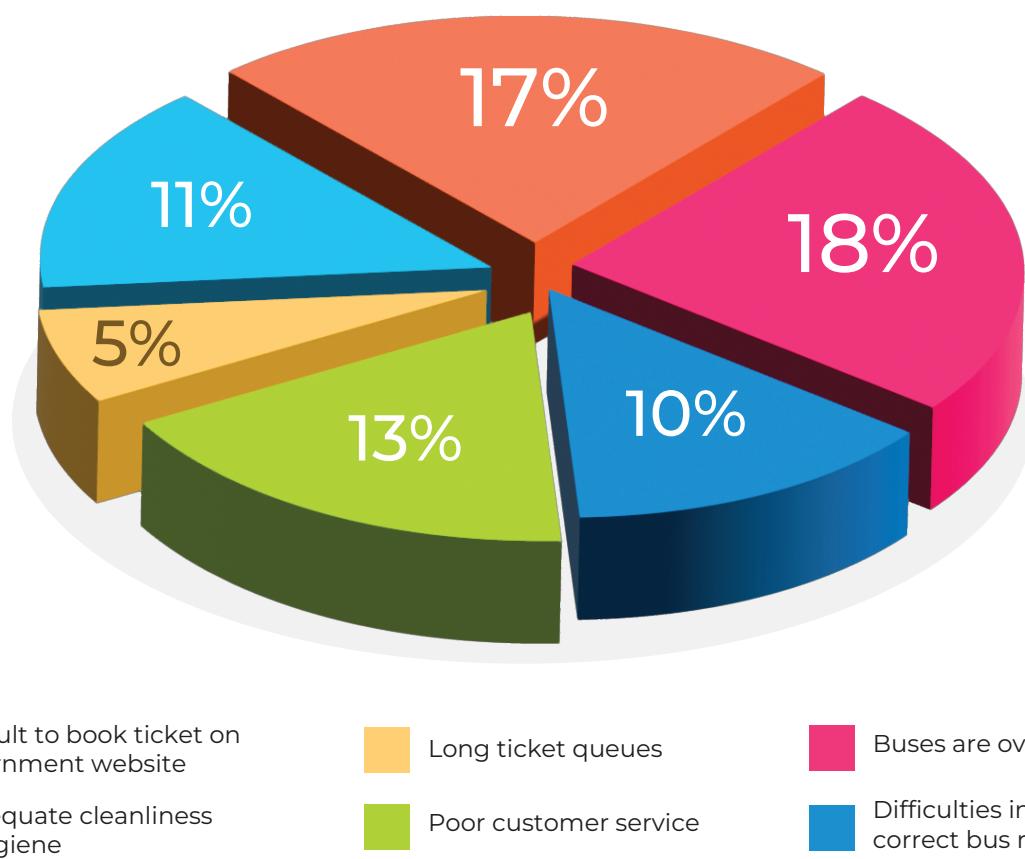
06

Key issues experienced

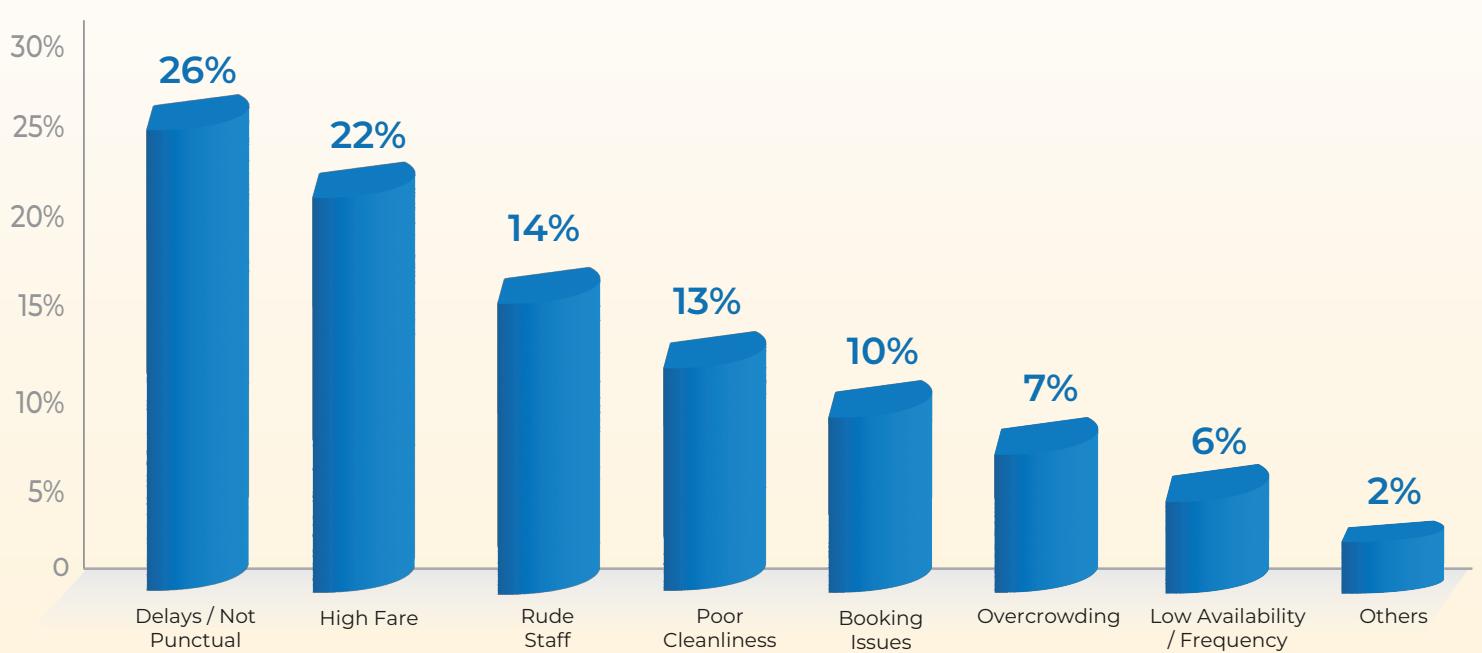
- Close to 50% of respondents have expressed a need for an easier booking process and after sales services (customer care/refunds).
- Compared to private buses, only 6% of people said RTCs had good digital ticketing options
- 16% of people report 'long ticket queues' and 'difficult government websites' as issues.
- **Difficult customer service** (e.g. refunds / rescheduling) and **difficulty in finding bus schedules** is an issue listed by almost **one-fourth of respondents (23%)**



Key issues experienced with RTCs



Reasons why non RTC users avoid RTC buses

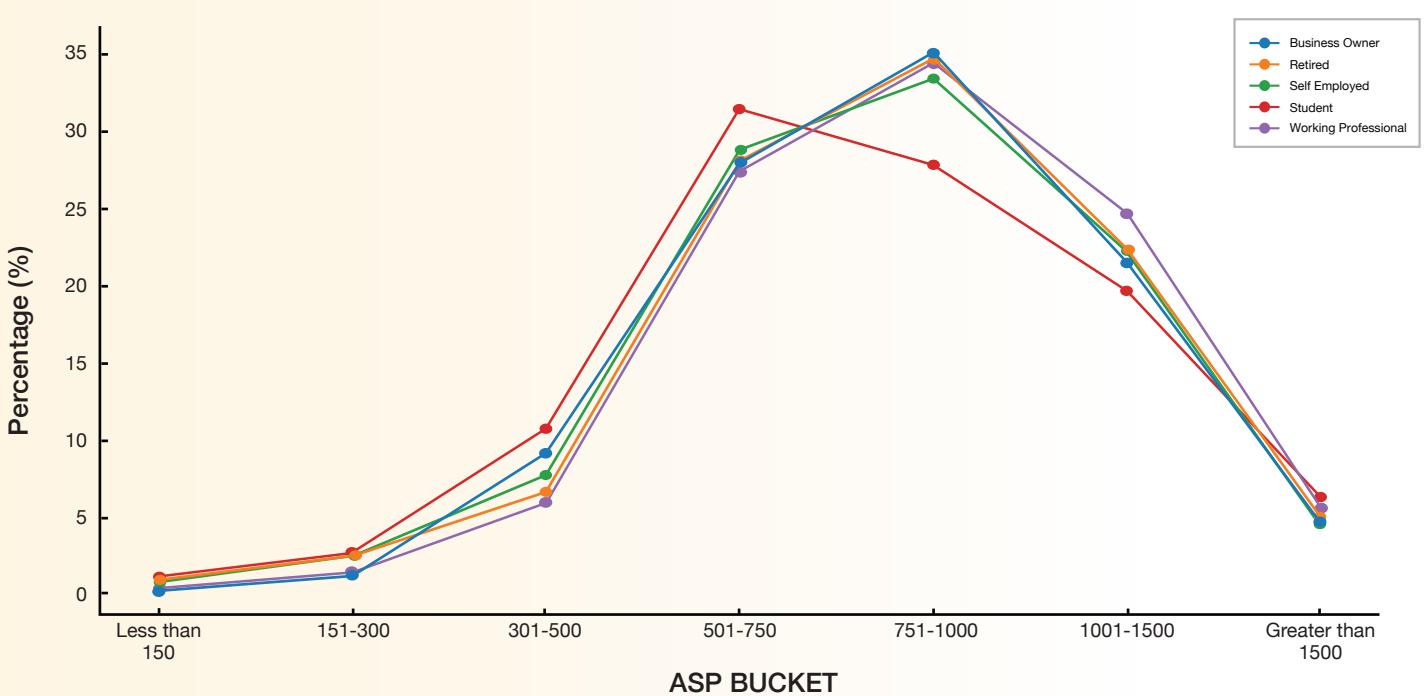


07

Insights about Seat prices

- Overall, the average seat price (ASP) for private and RTC buses is **Rs.990**. For only RTC buses the ASP is Rs.500 (redBus platform; as per June 2025)
- Students are the most price sensitive cohort**; their average spending (ASP) is typically less than Rs. 750 bracket compared to other age groups. For this price bracket, **they make up 46% of all users**, even though they are only 27% of all RTC users.
- This is backed by the fact that 'travelling for studies' has the lowest ASP of all reasons. Also, 14% of students have said **RTCs are not value for money** (highest among all age groups)

Distribution of Users by ASP Bucket and Occupation

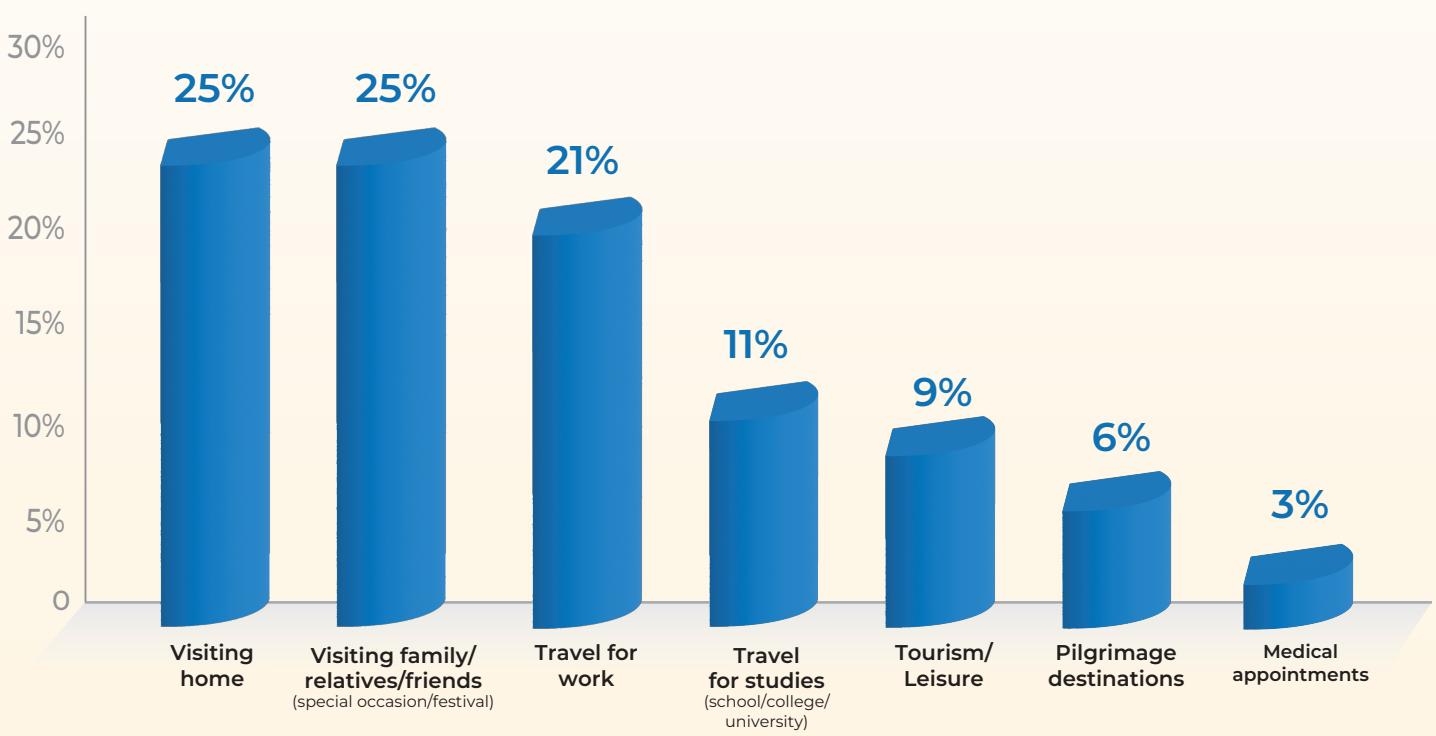


08

Why do customers travel and how often

- The top 2 reasons for using RTC buses - constituting 50% of responses - are '**Visiting home (25%)**' and '**Travel for special occasions/festivals (25%)**' as the primary purpose of travel.
- Travel for work** comes in at 3rd place (21%) and **travel for studies** is the 4th most common response (11%)
- This is also supported by the age group breakdown. For instance, in the 18-25 year old age group 61% list '**Travel for education**' as primary purpose of travel.
- Interestingly, **travel for festivals & special occasions** saw the highest frequency out of all reasons for travel.

Primary Purpose of travel for RTC Users



CONCLUSION

The purpose of this survey was to understand the sentiments of bus passengers towards RTCs. The inquiries consisted of what RTC users liked or thought could be improved, for state intercity bus services. The survey was also undertaken to understand why non-RTC users chose private buses. Several common threads emerged in the findings:

- **Top reasons given by passengers for using RTC buses** are 'Visiting home' (25%), 'Travel for special occasions/festivals' (25%), 'Travel for work' (21%) and 'Travel for studies' (11%).



- **High user satisfaction:** Overall, a little more than half the users are satisfied with their RTC experience. 89% of respondents are satisfied or are neutral towards RTC experience (not expressing dissatisfaction). However, between all cohorts and age groups, dissatisfaction levels are highest among students



- **Why RTCs are preferred:** The main reason customers prefer RTCs over private buses are lower fares (20% of customers) and better connectivity (33% rated factors around connectivity)





- **Why RTCs are preferred:** 66% of people feel that RTC buses provide value for money. Out of the 34% who do not feel that RTC buses give value for money; students and unemployed people are the cohorts who showed the highest levels of dissatisfaction.

- **Scope for improvement:**

Some of the top reasons listed by passengers for not using RTC buses include lack of availability, convenience, and punctuality.



- **Scope for improvement:**

RTCs are highly rated on punctuality, driving, and staff behaviour. However one major area of improvement is cleanliness with 30% of respondents rating RTC buses 1 or 2 out of 5.

- **Scope for improvement:** Around 50% of respondents want an easier booking process (easier digital ticket booking, avoiding long queues, finding schedules easily) and better after sales service (rescheduling, refunds)



Questions asked in the survey

- What state do you live in?
- Do you use ST/STU/Roadways/ RTC?
If yes, which do you mostly use?
- If you don't use ST/STU/Roadway/RTC, why not?
- What is your occupation?

If a respondent uses RTCs, following questions to be answered:

- How often do you travel by an RTC?
- What is the primary purpose of your RTC bus trips?
- Why do you prefer RTC over private buses?
- On a scale of 1 (lowest) to 5 (highest) please rate RTC buses on the following metrics:
Driving, Punctuality, Staff behaviour, and Cleanliness
- Why do you prefer private buses over RTC buses?
- How satisfied are you with your overall RTC travel experiences?
- Do you feel that the RTC buses provide value for money?
- Have you ever experienced any of the following issues with RTC buses?
- What improvements would you like to see in RTC bus services?
- What would encourage you to use ST/STU/Roadway/RTC buses more often?
Any suggestions or feedback?



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



