

EVENT REPORT

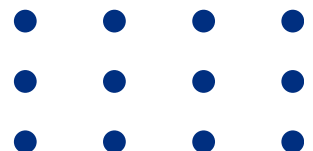
Strengthening Public Bus Transport in Indian Cities



05 August, 2026
Hubli-Dharwad, Karnataka

Conference organised by
Centre for Public Policy Research | Kochi

In Collaboration with
**North Western Karnataka Road Transport Corporation
(NWKRTC) | Karnataka**



Report prepared by
Centre for Public Policy Research | Kochi

CPPR EVENT REPORT



Stakeholder Conference

Strengthening Public Bus Transport in Indian Cities

Date and Time : 5 August, 2026, 11:00 AM

Venue : NWKRTC Office, Hubballi-Dharwad

Organiser : Centre for Public Policy Research (CPPR)

In partnership with : North Western Karnataka Road Transport Corporation (NWKRTC)

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Proceedings Report

- A stakeholder conference titled "Strengthening Public Bus Transport in Indian cities" was held on 5 August 2026 at the NWKRTC Office, Hubballi-Dharwad, organised by the Centre for Public Policy Research (CPPR), Kochi, to present findings from the demand estimation component of its national-level study, Role of Markets in Indian Road Transport System, supported by the Templeton World Charity Foundation.
- The conference was attended by the Managing Director, Chief Traffic Manager, Divisional Controller and Divisional Traffic Officer (City Transport Division), and BRTS Depot Managers from NWKRTC; the Managing Director, General Manager (ITS & Operations), General Manager (Civil), and project engineers from BRTS; and technical staff from the Directorate of Urban Land Transport (DULT) associated with the BRTS project. CPPR's research team presented demand estimation findings drawn from a survey of 10,353 commuters across 87 locations in 5 cities, covering current mobility patterns, current and potential demand, first- and last-mile connectivity, modal shift potential, fleet requirements, and commuter preference and satisfaction. The presentation was followed by an open discussion, in which attendees validated the findings against their own operational experience.

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Summary of Discussions

About the study

The conference presented findings from Role of Markets in Indian Road Transport System, a national-level study by CPPR examining the policies, regulations, and institutions shaping India's bus transport system and the outcomes for operational efficiency, ridership, and market access. The study spans city-level analysis in five cities (Pune, Indore, Jaipur, Surat, and Hubballi-Dharwad) and state-level analysis in three states (Kerala, Karnataka, and Tamil Nadu). Demand estimation is one of the study's major workstreams, and this component formed the substance of the conference, where CPPR presented comparative demand-estimation findings for all five cities.

The five cities covered by the study (Pune, Indore, Jaipur, Surat, and Hubballi-Dharwad) were selected against a common set of criteria. All five are Tier 2 cities, chosen because buses are the dominant mode of public transport in each, rather than one option among several as in India's larger metros with metro or suburban rail networks. Their population sizes span a wide range within that Tier 2 category, from approximately 60 lakh in Surat to approximately 13 lakh in Hubballi-Dharwad, so that the study could capture how different scales of Tier 2 city experience bus transport. Each city also has a Bus Rapid Transit (BRT) component, ensuring that every city studied had already worked on bringing innovations into its bus transport system. Their bus operations, moreover, follow different structural models, ranging from Gross Cost Contract (GCC), Net Cost Contract (NCC), and hybrid models to services operated entirely by the State Transport Undertaking (STU), allowing the study to compare outcomes across different operating models.

Finally, the five cities sit within different cultural and political environments, so that the study could account for how such differences shape bus transport policy and outcomes across India, rather than draw conclusions from a single context.

Current Mobility Patterns

Presenting the survey's baseline findings, CPPR noted that buses account for 76.5 per cent of commuting trips in Hubli-Dharwad, the highest bus mode share among the five cities studied, ahead of Pune (71.8 per cent), Indore (48.2 per cent), Surat (46.9 per cent), and Jaipur (35.9 per cent). A pronounced gender gap was flagged within this figure: 86.6 per cent of women commute by bus at least once a week, against 68.4 per cent of men, a pattern CPPR linked to Shakti scheme providing free bus travel for women.

CPPR went on to characterise this ridership as routine rather than occasional: 98.8 percent of commuting trips are recurring, 93.8 percent of bus users who use it for commuting trips ride five or more days a week, and 87.3 percent of them make exactly two trips a day – a fixed demand pattern that the bus system can tap into. While other trips, like shopping trips and recreation trips, also follow a fixed origin-destination pattern, those are not as regular.

An equity dimension was also raised: 62.5 percent of commuters surveyed own no personal vehicle, rising to 82.4 percent among women, and bus mode share for commuting was found to decline steadily with household income, from 81.8 percent among Economically Weaker Section households to 53.1 percent among High-Income Group households. Lower-income residents, CPPR noted, have the fewest alternatives and the greatest dependence on the existing network.

The Demand-Supply Gap

Turning to the study's central finding, CPPR reported that current bus ridership in Hubli-Dharwad (approximately 270,000 trips per day) meets only 54 percent of the estimated current demand of 493,192 trips per day. Potential demand, accounting for commuters willing to shift from other modes given improved service, was estimated at 749,923 trips per day, 52 percent above current demand (or 2.8 times the current ridership). Measured in trips per person per day, Hubballi-Dharwad recorded both the highest current demand (1.46, against Pune's 1.02, Indore's 0.79, Surat's 0.72, and Jaipur's 0.45) and the highest potential demand (2.22, against Pune's 1.25, Indore's 1.38, Surat's 1.29, and Jaipur's 0.90) of any city studied, which CPPR presented as the basis for its case that investment in the city's bus network would yield the greatest return of the five cities.

First- and Last-Mile Connectivity

CPPR presented connectivity cost – what commuters pay to reach and leave the bus network, as a share of the base fare – across all five cities: from 100 percent in Jaipur to 195 percent in Hubballi-Dharwad, with Surat (122 percent), Indore (127 percent), and Pune (132 percent) in between. Hubballi-Dharwad recorded the highest ratio of the five: commuters there pay an average of ₹21 over 4.3 km to reach a stop and a further ₹20 over 2.6 km after alighting, a combined connectivity cost of 195 percent of the base fare. As a result, a full door-to-door bus trip in Hubballi-Dharwad, at roughly ₹62, costs more than travelling the same distance by two-wheeler (₹53.6), despite the ₹21 base fare being the cheapest of any mode measured. This gap, CPPR noted, is currently being filled informally in the cities by shared intermediate public transport, without formal integration into the bus network.

Modal Shift Potential

CPPR presented its assessment of non-bus users' willingness to shift and what share of their trips would realistically convert. Shared IPT users showed near-unanimous willingness (99.7 per cent), translating to 84.3 per cent of their trips being convertible, the highest of any segment or city studied. Hired IPT users showed 72.4 percent willingness (61.6 percent of trips convertible), and private vehicle owners 72.1 percent willingness (49.6 percent convertible, the lowest of the three).

Regarding what would trigger the shift, CPPR reported that private vehicle owners cited comfort (33.7 percent) and connectivity (32.7 percent) ahead of frequency, travel time, and cost; hired IPT users ranked connectivity highest (32.5 percent); and shared IPT users cited a simpler barrier: 43 percent said buses do not serve their area at all.

CPPR also raised a retention concern: On average, the cities are losing an estimated 0.4 trips per person per day from their own existing bus riders to other modes, of which, on average, 55 percent is recoverable. Hubli-Dharwad has the highest recovery willingness (75.5 percent) among the five cities studied, ahead of Jaipur at 60.0 percent, Surat at 59.6 percent, Indore at 52.1 percent, and Pune at 30.7 percent.

Fleet Requirements

CPPR presented the study's fleet analysis across all five cities: current bus supply per lakh population ranged from 4 in Jaipur to 46 in Pune, against a demand-based requirement for potential demand ranging from 22 in Jaipur to 113 in Hubballi-Dharwad. Hubballi-Dharwad recorded the widest gap of the five, both proportionally and in absolute terms: current supply against the potential-demand requirement stood at 30 against 113 buses per lakh in Hubballi-Dharwad, compared with 46 against 76 in Pune, 14 against 52 in Indore, 10 against 63 in Surat, and 4 against 22 in Jaipur. Measured against the MoHUA guideline of 40-60 buses per lakh population, Pune's current fleet is the only one of the five that falls within range; all the remaining four cities studied fall short of it.

Commuter Preferences and Service Quality

CPPR reported that safety, not cost, is the leading reason commuters choose the bus, cited by 53 percent of respondents ahead of health (20 percent) and financial savings (16.6 percent). Hubli-Dharwad and Surat being the only two of the five cities studied where safety outranks cost as the primary motivator.

On service quality, CPPR noted that nine in ten commuters rate core aspects of the existing service positively; scheduling, frequency, affordability, punctuality, safety, and comfort all scored above 90 percent. Three gaps were flagged against this otherwise strong scorecard: booking-app satisfaction at 58.7 percent, with a third of respondents neutral; 43.4 percent of shared-IPT users citing poor route coverage; and 56.4 percent of personal vehicle users reporting a nearest stop over 2.5 km away. CPPR's assessment was that the gaps identified relate to gaps in first/last mile connectivity and intermodal connectivity rather than day-to-day service delivery.

Outcomes

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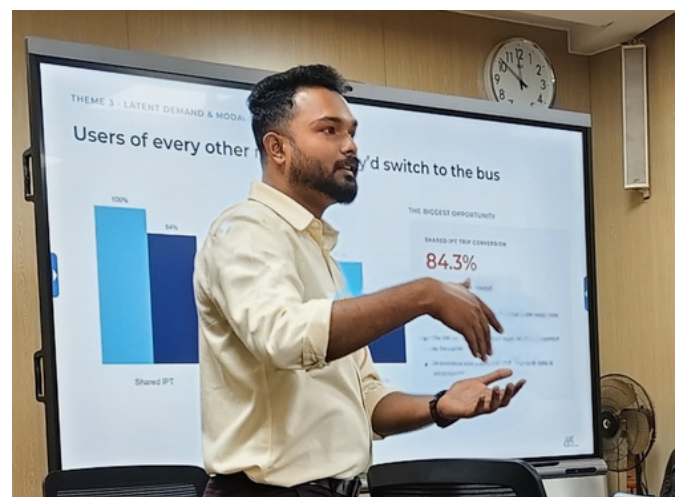
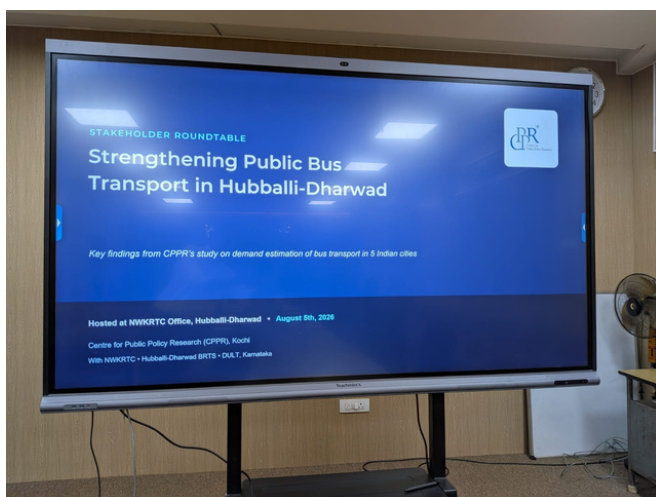
Officials from NWKRTC, HDBRTS, and Directorate of Urban Land Transport (DULT) acknowledged the gaps CPPR presented, particularly the connectivity costs borne by commuters and the shortfall in fleet capacity against both current and potential demand.

The Managing Director, NWKRTC, directed that a document be prepared consolidating CPPR's data to support the case for increasing the fleet from the current 30 buses per lakh population to the 76 buses per lakh population required to meet current demand.

Key Recommendations

- Fleet expansion toward the demand-based requirement (74 buses/lakh for current demand, 113 buses/lakh for potential demand)
- Continued attention to service delivery and quality of services while taking steps to increase first- and last-mile connectivity to the bus system.
- Retention-focused service improvements, alongside efforts to acquire new ridership
- A consolidated data document, as directed by the NWKRTC Managing Director, to support the case for fleet expansion

Photos





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