



GLOBAL TRANSIT TICKETING & FARE COLLECTION REPORT

Analysis and database of 750 cities

Global Mass Transit has been tracking deployment of advanced fare collection systems worldwide for nearly a decade and has now launched the sixth edition of the **Global Transit Ticketing & Fare Collection Report**.

The report will cover the current status of and opportunities in installation of transit ticketing and fare collection systems in 750 cities globally.

The report will have four distinct sections.

Part 1 (PPT format) will provide the current status and market size of the AFC segment, market size by sub-segments (contactless smartcards, mobile ticketing, front-end hardware, back-end, service and maintenance), market size by region (North America, Latin America, Asia Pacific, Europe, Middle East, Africa); key case studies for deployment of account-based ticketing (ABT), EMV payments in transit and mobile ticketing (apps and wallets); and recent developments.

It will also discuss key upcoming global trends, paradigms for future of urban mobility, new business models impacting ticketing, MaaS, integration of public transit with micro-mobility, licensed taxis, e-hailing, autonomous taxis, car sharing, etc, changing mobility behaviour, new technologies and prioritising equity through fare systems.

It will also provide an outlook for the segment and discuss key growth drivers, growth in AFC market by 2028, market opportunities, plans of transit agencies to deploy advanced fare media, plans for integration and interoperability, and outlook for closed loop payment systems, mobile ticketing, and EMV payments in transit.

Part 2 (PPT format) will provide an in-depth analysis of the industry by fare media deployed, integration and interoperability, and key technology providers. It will cover the current landscape and outlook for fare media options including contactless smartcards, bank cards, mobile ticketing, and others. It will also discuss key policies supporting integration, multi-modal and multi-operator ticketing, regional integrated ticketing systems, nationwide systems and cross-border ticketing.

Part 3 (PPT format) will focus on the current status, key trends, outlook and opportunities by region covering North America, Latin America, Asia Pacific, Europe, the Middle East and Africa.

Part 4 (Excel database) will provide detailed information on 750 cities in 113 countries. The database will be organised into six regions: North America, Latin America, Asia Pacific, Europe, the Middle East and Africa. Each city profile will provide information on modes operated in the city, mode-wise ridership, existing fare media and technology, current ticketing infrastructure, vendors/suppliers of ticketing infrastructure, current status of account-based ticketing (ABT), Mobility-as-a-Service (MaaS), existing level of fare integration, planned public transport network, plans for new fare media/contactless payment systems, plans for ticketing infrastructure deployments, planned level of integration (across modes, city-wide, national, etc.), plans to deploy ABT, ABT vendors, key contract awards, contract values, timelines and AFC implementation schedules, etc.

How is the latest edition different from the previous editions?

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| - Provides information on 750 cities globally instead of 500 cities covered earlier | - Analyses key regional and national policies impacting AFC adoption |
| - Covers AFC market size by sub-segments and by region | - Examines key upcoming global trends that are expected to transform transit ticketing |
| - Provides a complete new section on regional analysis highlighting the drivers, trends, status and growth dynamics in each region (North America, Latin America, Europe, Asia Pacific, the Middle East and Africa) | - Discusses the increasing role of MaaS in integrating multiple modes of transport and impact on ticketing |
| | - Showcases case studies highlighting experience so far, lessons learned and best practices |

The report will be useful for organisations interested in transit fare collection systems—transport authorities, operators, service and technology providers, equipment manufacturers and suppliers, investors/lenders, banks and financial institutions, start-ups, research organisations, industry consultants, regulatory agencies, development institutions, academia, etc.

The report is expected to be released by end-March 2023.

To order the report, please contact:

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Our Expertise

Global Mass Transit has been tracking deployment of advanced fare collection systems worldwide for nearly a decade. The first edition of the report was launched in 2013.

We also undertake custom research assignments, tailored and optimised to meet the specific needs of our clients in the AFC segment. Our recent custom assignments include:

- Analysis of existing public transit systems and transit ticketing technology in 229 cities in Europe, Middle East, Africa and Asia Pacific for a global fare system technology provider
- Potential fare system deployment opportunities in public transit systems in 85 cities in Asia Pacific for a leading global consulting firm
- Estimating market size of the fare system and account-based ticketing industry for global technology provider
- Potential investment opportunities in India for a global digital wallet company

(Please reach out to Namrta Bangia, Senior Director, Global Mass Transit at namrta.bangia@globalmasstransit.net) if you have any queries.

We also regularly organise conferences and webinars on Transit Ticketing & Fare Collection in Europe, North America, APAC, MENA and Africa. These conferences enable us to have access to case studies, recent trends, opportunities and perspectives of public transit agencies/authorities (PTAs), public transport operators (PTOs), system integrators, technology providers, equipment manufacturers, financial services companies and consultants.

The latest editions are listed below:

- Transit Ticketing & Fare Collection in the US, November 2-3, 2022, JW Marriott San Francisco Union Square
- Transit Ticketing & Fare Collection in Europe, May 17-18, 2022, InterContinental Amstel, Amsterdam
- Transit Ticketing & Fare Collection in MENA, September 7-8, 2022, Address Boulevard, Dubai
- Transit Ticketing & Fare Collection in Canada, April 7, 2022, Virtual Event
- Transit Ticketing & Fare Collection in Africa, August 26, 2020, Virtual Event
- Leveraging e-Fare Systems for Transit COVID Recovery, July 8, 2020
- Contactless Fare Payments & MaaS in APAC, June 17, 2020
- Contactless Fare Systems and MaaS in the US, May 21, 2020
- Transit Ticketing & Fare Collection in APAC, October 16-17, 2019, Marina Bay Sands, Singapore

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PART 1: MARKET SIZE, EMERGING TRENDS AND OUTLOOK

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- 1.1.3 Impact of AFC systems on ridership
- 1.1.4 Market size of AFC segment
- 1.1.5 Market size by sub-segments (contactless smartcards, mobile ticketing, front-end hardware, back-end, service and maintenance)
- 1.1.6 AFC market size by region (North America, Latin America, Asia Pacific, Europe, Middle East, Africa)
- 1.1.7 Account-based ticketing (ABT): size and key case studies
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- 1.2.8 15-minute city plans
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2.3.2 Key Products/Product portfolio

2.3.3 Current presence/deployments

2.3.4 Expansion plans and strategy

- Planned level of integration (across modes, city-wide, national, etc.)
- Additional information

Cities from the following countries will be covered:

PART 3: REGIONAL ANALYSIS

Each regional section will provide in-depth analysis on current status of fare media deployed, integration and interoperability, case studies, emerging trends, growth dynamics, plans of agencies to deploy advanced ticketing systems, and outlook for fare media options.

3.1 North America

3.2 Latin America

3.3 Asia-Pacific

3.4 Europe

3.5 Middle East

3.6 Africa

North America

- Canada
- United States

Latin America

- Argentina
- Belize
- Bolivia
- Brazil
- Chile
- Colombia
- Costa Rica
- Cuba
- Dominican Republic
- Ecuador
- French Guiana
- Guatemala
- Mexico
- Panama
- Paraguay
- Peru
- Venezuela

Asia Pacific

- Australia
- Azerbaijan
- Bangladesh
- Bhutan
- Cambodia
- China
- India
- Indonesia
- Japan
- Kazakhstan
- Laos
- Macao
- Malaysia
- Maldives
- Mongolia
- Myanmar

PART 4: EXCEL DATABASE OF 750 CITIES

Each city profile will include information on:

- Key players (operators and developers)
- Modes operated in the city
- Ridership for each mode
- Current fleet size and stations
- Existing fare media and technology [contactless smartcards, RFID-tokens, NFC-enabled devices (excluding smart phones), paper tickets, magnetic stripe tickets, metal tokens, contact-based smartcards, bank/EMV cards and mobile ticketing (App-/ QR code-/ NFC-based/digital wallets)]
- Current ticketing infrastructure
- Vendors/suppliers of ticketing infrastructure
- Account-based ticketing (ABT)
- Mobility-as-a-Service (MaaS)
- Existing level of fare integration (across modes, city-wide, regional, national, with retail, with parking, etc.)
- Planned public transport network (lengths, stations/stops, rolling stock, estimated investment, and commencement of operations)
- New fare media planned
- Plans to deploy ABT
- ABT vendors
- Key contract awards
- Contract values
- Timelines and AFC implementation schedules

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- Belgium
- Bulgaria
- Croatia
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Georgia
- Germany
- Greece
- Hungary
- Iceland
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Macedonia
- Malta
- Moldova
- Monaco
- Norway
- Poland
- Portugal
- Romania
- Russia
- Serbia
- Slovakia
- Slovenia
- Spain

- Sweden
- Switzerland
- The Netherlands
- Turkey
- Ukraine
- United Kingdom

Middle East

- Bahrain
- Iran
- Iraq
- Israel
- Jordan
- Kuwait
- Oman
- Qatar
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- UAE

Africa

- Algeria
- Cameroon
- Cote d'Ivoire
- Egypt
- Ethiopia
- Ghana
- Kenya
- Libya
- Mauritius
- Morocco
- Nigeria
- Rwanda
- Senegal
- Sierra Leone
- South Africa
- Tanzania
- Tunisia
- Uganda

PART 5

- Sources and methodology
- List of Acronyms

Sources and Methodology

Global Mass Transit Research's industry analysts have utilised primary and secondary research sources in preparing this report. Primary sources include information obtained through telephone interviews and emails from public transport authorities, operators and regulators. Secondary sources include, but are not limited to, project websites and status reports; websites, annual reports, capital programmes and financial reports of transport authorities and operators; documentation provided by relevant financing institutions; investor presentations; analyst reports; government plans and documents; websites of ministries and regulators; websites of industry associations; internal and external proprietary databases; news articles; and press releases. Wherever applicable, research sources are cited within the report.

Our analysts and researchers have combined the information from these primary and secondary sources with their industry expertise to synthesise the qualitative and quantitative analyses presented in this report. In cases where data was not available, we have used the estimates from authentic published reports or press releases.

Great care has been taken to ensure that all analyses are supported by facts. In situations where facts were not available and assumptions were made to conduct analyses, we have explained our assumptions and our methods of estimation.

Global Mass Transit Research has taken every possible precaution to provide information based on/from resources it believes are most accurate and reliable. It, however, shall not be liable for losses or consequences, if any, arising from the use of the information contained in the document.

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Global Mass Transit is a leading provider of information and analysis on the global mass transit industry. It publishes the **Global Mass Transit Report** (a monthly newsletter) and **Global Mass Transit Weekly** (a weekly update). It also operates the www.globalmasstransit.net website.

Through these products, **Global Mass Transit** provides information on all key developments, trends and issues in the sector; tracks major projects, contracts and investments; profiles leading mass transit authorities/operators and discusses their strategies; reports on regulatory initiatives and examines their implementation; provides the latest available data and statistics; and features views and perspectives of experts and top industry players.

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