

STUDY OVERVIEW

Global Payment Cards Data and Forecasts to 2027

Executive Report and Market Database



Published September 2022

www.rbrlondon.com

Only RBR provides the cards and payments industry with comprehensive coverage, consistent data, reliable forecasts and deep market insights

Comprehensive coverage

- ▶ Robust analysis and real insights on issuing, acquiring, contactless, e-commerce and more
- ▶ Covers 99.5% of global card purchase volume
- ▶ Only RBR fully addresses domestic networks, private label cards, Visa Electron, Maestro etc.

Consistent, accurate data

- ▶ Proprietary research with multiple sources synthesised to ensure market sizes and shares reflect standardised definitions across countries
- ▶ Reliable forecasts based on repeatable methodology and robust review

Deep market understanding

- ▶ Multilingual in-house team, with deep industry focus and country expertise
- ▶ Research, analysis and writing integrated – engage directly with RBR's experts to add value to published research

Long-term commitment

- ▶ Clear focus on banking and retail; covering cards and payments for >35 years
- ▶ Reputation for integrity and independence
- ▶ The authoritative research provider trusted by the industry's major players

"RBR's cards research provides us with strategic industry benchmark data of a quality which is heads above anything else available"

Mastercard

Global Payment Cards Data and Forecasts provides comprehensive data and insightful commentary across all aspects of the market

	Topics					
	Card issuing	Card usage	Contactless	e-Commerce	Acceptance	Cashless payments
Geographies	Global coverage with data for 67 country markets across 4 regions					
Card types	Figures for credit, debit and prepaid					
Metrics	Volume of payments , number of payments , number of cards , number of POS terminals , number of merchant outlets etc.					
Card schemes	Details by network and brand : American Express, Discover, Diners Club, Domestic, JCB, Maestro, Mastercard, Mastercard Electronic, Private Label, UnionPay, Visa, Visa Electron, V PAY					
Time periods	Actual data for 2017-2021 ; forecasts for 2022-2027					

Complete data scope can be found at www.rbrlondon.com/global-cards

RBR's *Global Payment Cards Data and Forecasts* comes in easy-to-use formats, and includes access to RBR analysts

Three study deliverables collectively address clients' core market intelligence needs

Executive Report

- ▶ Key market statistics, trends and commentary
- ▶ Country reports and global/regional comparative analyses
- ▶ Familiar PowerPoint format facilitates use of material
- ▶ A presentation to executives can be arranged

Market Database

- ▶ Comprehensive figures allowing easy extraction of data for further analysis
- ▶ Table and charting tool to allow users to easily produce bespoke outputs

Analyst Access

- ▶ Privileged access to RBR's senior researchers

Purchasing Options

Global Report

£88,000

Regional Reports

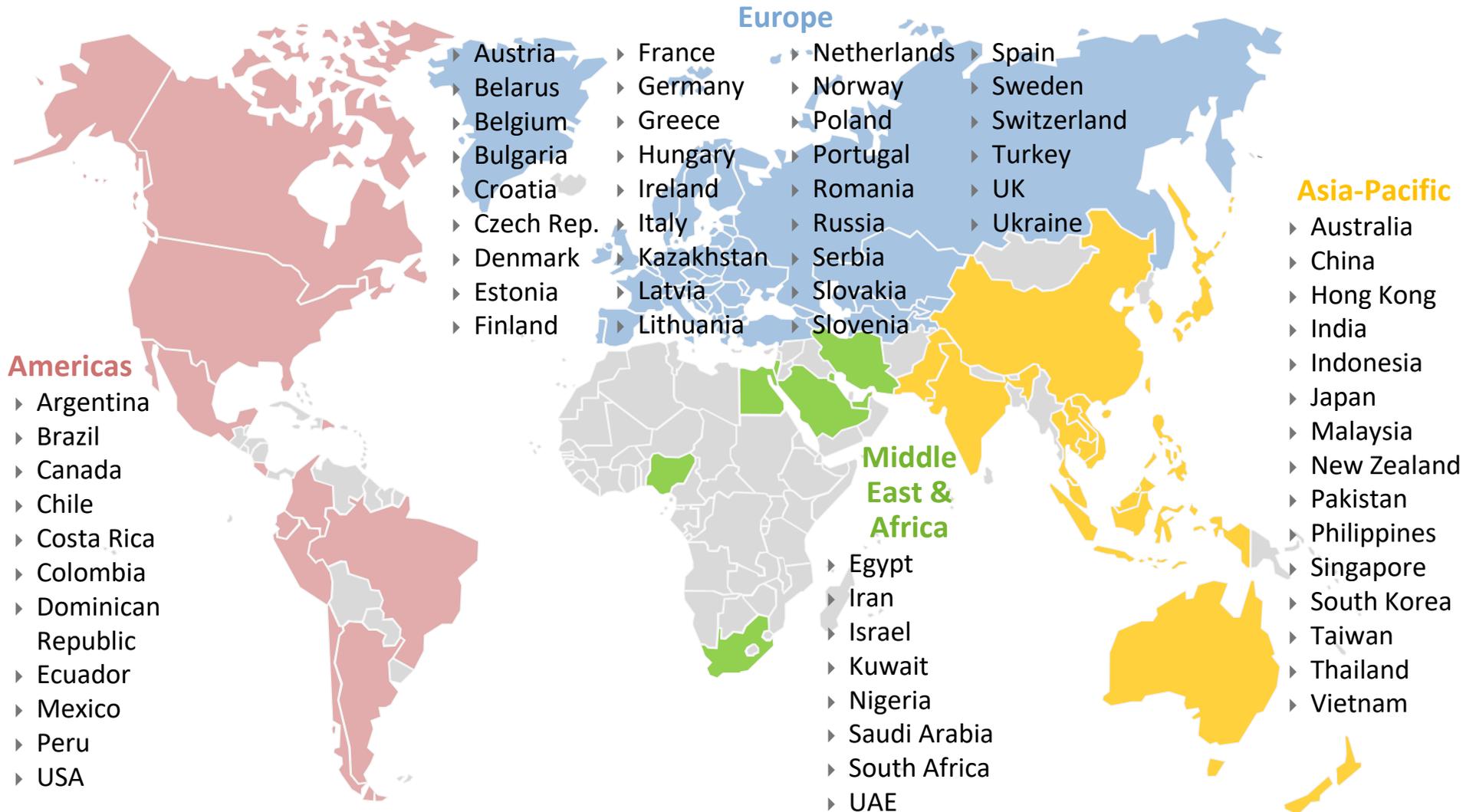
Asia-Pacific: £31,000 Europe: £51,000
Americas: £22,500 MEA: £16,500

Country Reports

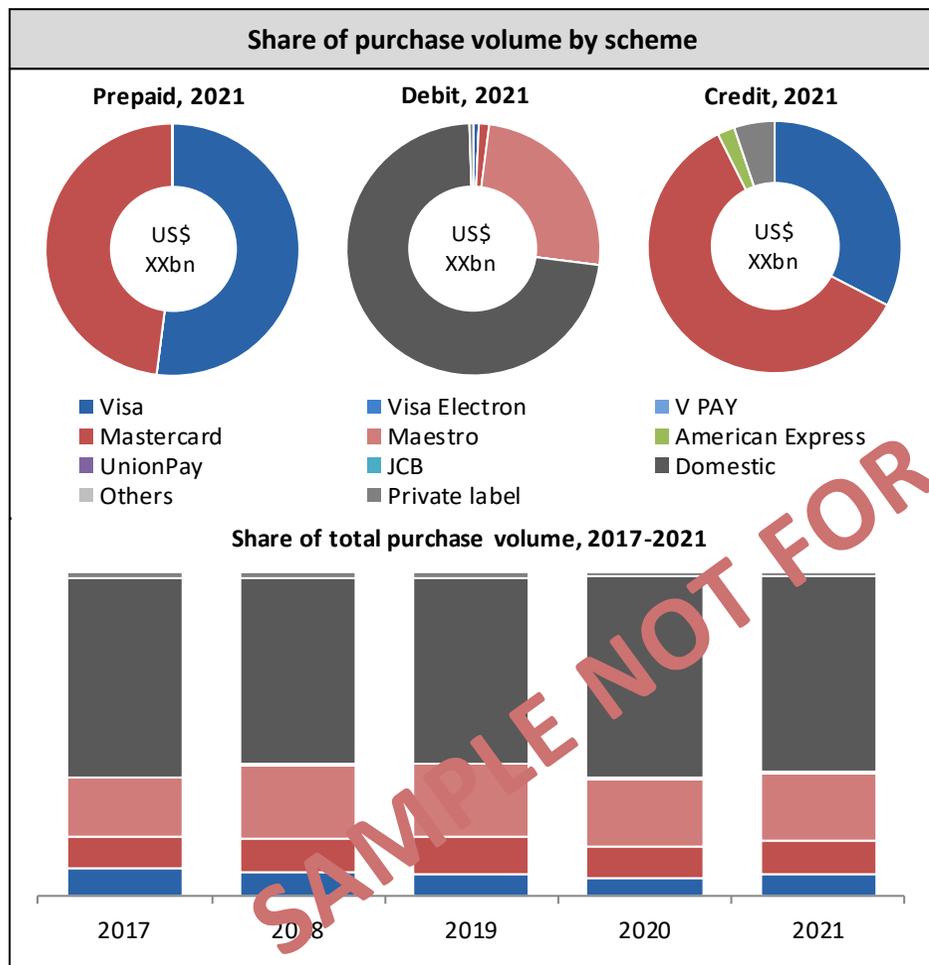
£4,700

To discuss your requirements, please contact RBR on +44 20 8831 7300 or rbr@rbrlondon.com

Global Payment Cards Data and Forecasts covers 67 countries across four regions



In 2021, the return of international travel causes domestic scheme Bancontact to lose some of the gains it had made in 2020



Source: RBR analysis

Key insights

- ▶ At end-2021, the vast majority of open-loop debit cards in Belgium remained Maestro/Bancontact-branded, but BNP Paribas Fortis introduced a small number of Visa Debit/Bancontact-branded cards
- ▶ Belfius also introduced the first single-badged open-loop debit cards to the market, offering Mastercard debit cards
- ▶ Bancontact continues to be used for most domestic payments, whilst the international scheme is primarily used for transactions abroad. However, the cardholder has the option to choose Maestro or Visa Debit over the domestic scheme for payments in Belgium
- ▶ In terms of the scheme used for debit payments, Bancontact made up 73% of purchases and volume in 2021, down from 75% in the previous year, as the return of some foreign travel boosted usage of international schemes
- ▶ Maestro held a 25% share of debit volume from a dual-badged perspective, compared to 95% when based on the international brand on the card.
- ▶ Visa held a negligible share, compared to their brand-on-card share of 3%
- ▶ Mastercard had a 1% purchase volume share within debit, as a result of the new single-badged card introduced by Belfius in 2021
- ▶ In terms of the market as a whole, Bancontact made up 61% of purchase volume and 66% of total payments, whereas Maestro accounted for 21% in terms of both payments and purchase volume
- ▶ Bancontact enjoys slightly higher acceptance than both Mastercard and Visa in Belgium, although in most outlets all three are accepted

Comprehensive Excel market database allows users to access data, produce charts and carry out bespoke analysis in a familiar format

GLOBAL PAYMENT CARDS DATA AND FORECASTS
 Volume of Card Purchases by Scheme - Dual-Bank
 Confidential - Client Internal Use Only

Country	Scheme	2017				2018			
		Prepaid	Debit	Credit	Total	Prepaid	Debit	Credit	Total
		Portugal	0.5	1.1	2.5	4.1	0.6	1.2	2.6

GLOBAL PAYMENT CARDS DATA AND FORECASTS TO 2027
 Number of e-commerce Card Purchases by Type of Card - 2017-2027 (million)
 Confidential - Client Internal Use Only

Country	Type	2017	2018	2019	2020	2021	2022	2023
Australia	Prepaid	8.1	10.0	13.3	15.0	17.0	22.0	27.6
Australia	Debit							
Australia	Credit							
Australia	Total							
China	Prepaid							
China	Debit	34						
China	Credit	2						
China	Total	37						
Hong Kong	Prepaid							
Hong Kong	Debit							
Hong Kong	Credit							
Hong Kong	Total							

GLOBAL PAYMENT CARDS DATA AND FORECASTS
 Market Growth by Type, Volume of Purchases EUR, Italy, 2016-2027,
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Italy
 Volume of Purchases EUR
 ← Select Country
 ← Select Data

Market Growth by Type, Volume of Purchases EUR, Italy, 2016-2027, (billion)

SAMPLE NOT FOR COMMERCIAL USE