



## NEWSLETTER

### Highlights from Transport Ticketing Global 2023

The [FirstPartner/The Human Chain](#) transit team had an extremely productive few days at [Transport Ticketing Global](#). The world's largest event for public transport, smart ticketing and mobility held at London's Olympia on the 7<sup>th</sup> and 8<sup>th</sup> March 2023. The event showcased the latest in smart ticketing mobility solutions and passenger experience. There was a really positive feel at the event this year, after a number of very challenging years for the industry.



Attendance was improved on last year (post Covid) with over 100 industry speakers and 1,100 attendees, from 61 countries. The conference programme featured representatives from over

35 countries, filling the three theatres over two days. The exhibition floor had over 80 exhibitors showcasing a range of exciting innovations in the transit space.

New for 2023, were the Roundtables, where attendees could have a closed meeting room session with industry experts. Feedback was very positive, from both attendees and moderators and the organisers will do this again next year.

The event also hosted the eleventh annual [Transport Ticketing Awards](#). With a record number of entries and 240 attendees the awards celebrated key projects and achievements within



the last year. Judged by a panel of worldwide leading experts, these awards demonstrate the depth and width of innovation and success within the industry.

Despite the overall upbeat vibe, it was clear from our discussions that there are significant economical, technical, and social challenges to overcome for mainstream adoption of the various schemes, services technologies etc. that were showcased.

There was however a feeling that these schemes and technologies, if successfully adopted widely, have the potential to significantly reduce cost, friction and environmental footprint whilst significantly improving the traveller's user experience. A number of these topics are discussed further below:



[Evolution of Open-Loop Payments >](#)

[Account Based Ticketing \(ABT\) >](#)

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If you would like to discuss any of these themes with us, or if you would like more information on how [FirstPartner](#) can help your organisation please contact us at [hello@firstpartner.net](mailto:hello@firstpartner.net). We support clients in all aspects of business and technical consulting and research in transit ticketing, cEMV, mobile ticketing, ABT, procurement and deploying new services and products.

## Evolution of Open-Loop Payments

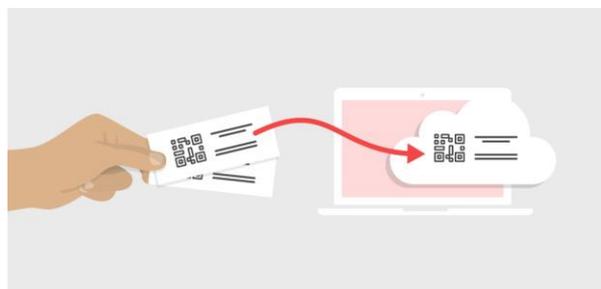
The global trend towards open-loop ticketing where users can pay directly for journeys using their existing contactless debit or credit card is continuing with a large number of transit authorities adopting this approach. There are also growing number of transit authorities that currently have limited or no open-loop ticketing support (such as the Netherlands) planning to provide role out in the near future. It was also great to see more and more ticketing validators/devices providing support for open loop payments due to demand from customers and a number of smaller players such as [VAYAPAY](#) and [IDTECH](#) launching new products and solutions in this space.



At the event Visa launched a major new research study: [“Reimagining ridership: Open-loop payments and the future of urban mobility”](#). This worldwide study provides an in-depth views and thinking from 75 transit agencies and 3000 transit riders on the use of open-loop payment to drive urban mobility, as frictionless, sustainable and inclusive as possible. Key findings were that “frictionless access” was vital to meet the changing needs of riders post Covid and that the world is at an “inflection point” both environmentally and also in driving modal shift to public transport. This is a must read, as it provides insight to these major issues that need to be addressed.

## Account Based Ticketing (ABT)

Account-based Ticketing (ABT) was a major topic at the event again, with a significant number of solution providers showcasing their latest ABT platforms and solutions. A number of these providers appear to be focusing on providing ‘turnkey’ solutions, targeted at smaller transit providers who want a quick and easy way of introducing ABT as an option for their customers.



Both small and larger vendors such as [Vix](#) are actively deploying solutions and innovating in this space and a significant number of transport authorities are starting to roll out solutions using this approach.

Countries that already have a national ID card that users must carry, also see ABT as an attractive proposition since the integration of the two allows transit authorities to offer services to a large customer base without the expense and complexity of deploying a mobile-based solution.

Intelligent Transport System (ITS) providers such as [KentKart](#) were also present at the event promoting their ABT-based systems that now enables concessionary for contactless open-loop EMV cards, which is essential to service, in order to target as much of the user base as possible.

## Social Inclusion

The buzz around new shared urban mobility schemes, introduction of wider support for open loop payment, new ABT schemes etc. created a welcome feel good factor around the event, but at the same time there was a growing recognition of the need to support groups within society that for many reasons would find adoption of these services difficult, if not impossible. This could include travellers who may not have a credit or debit card for payment or a smartphone to load the latest MaaS application, or may have difficulties using such solutions. There is obviously the question of how to provide these emerging services to the significant proportion of the global population that is 'unbanked or underbanked'.

There was also plenty of discussion around whether the cost of continuing to support cash-based payments was justifiable, when alternatives such as prepaid cEMV cards and mobile phone "cash apps", that can be topped up at retail grocery stores, are now ubiquitous in most countries.



It does seem there is some time to go before operators think they can completely move away from cash as a form of payment for transit related services, but is this just legacy thinking? TfL in London proved that in fact it was, with careful planning, quite easy to move away from cash totally on buses and severely limit cash acceptance elsewhere. This dramatically reduced TfL's costs, whilst not inconveniencing passengers. FirstPartner consultants had a number of interesting discussions at TTG as to whether it may actually be more financially viable for transit operators and authorities to provide services to some groups of users for free or provide cEMV pre-paid cards/cash apps to negate the need to continue to support cash-based payment.

## Encouraging Ridership and Modal shift – post Covid

A key theme at the event this year, was the need to drive ridership and also modal shift - getting people out from cars in particular to ride public transport, make use of shared rider services and also make use of micro mobility services (bikes and scooters etc) and to walk!

A number of speakers shared information on a range of financial incentives from free travel, to the subsidised daily, weekly or monthly schemes, such as those operating in Germany and

Austria, while highlighting the risks of unintended consequences, in terms of reducing the lowest impact and most beneficial modes, namely cycling and walking. So, a key take out was that this types of financial incentives have to be part of overall transport policies to drive real modal shift. They also need to be integrated, with the users being able to find, pay and use all the services easily and comfortably. This is, as many transit agencies stated at the event, hard to deliver, but some progress has been made.



We saw really positive signs that transit agencies and authorities around the world have the vision to support modal shift for sustainability and environmental benefit, but need the help of local, central and regional governments to fund the technology and infrastructure required.

## Shared Urban Mobility

The theme of Mobility as a Service (MaaS) or Shared Urban Mobility reached across the event this year with the promise of an integrated travel proposition that simplifies and reduces cost and friction for both operators and end users as well as significantly reducing a travellers environmental footprint. There were a number of announcements of MaaS schemes being

either trialled or going to commercial deployment during the event, including Transport for West Midlands (TfWM) who are launching their MaaS scheme later this year. Behind the scenes however, there was of plenty of discussion around exactly what full MaaS or Shared Urban Mobility is and the many challenges to achievement of true, widescale MaaS adoption.. The concept of 'MaaS lite' was also touted to denote a compromise position where true MaaS is unachievable. The feeling was that the industry is very much on the journey to achieving MaaS but far from reaching the destination!

Complexities such as the integration and simplification of existing fare structures and pricing schemes was cited by many as one of the key challenges to achieving this.

There are also a number of significant user experience challenges for service providers and operators to overcome, including end users having to install yet another mobile application on their device. Local authorities are also finding it difficult to track, engage and integrate with a growing number of alternative transport providers (car sharing schemes, eScooters to name but a few) that should really be integrated into these solutions to make them effective. It is also clear that more work has to be done to provide a more seamless 'transition' of travel users from personnel to public modes of transport including car parking.

The concept of MaaS roaming, where a MaaS solution effectively extends to a wider geographical area via a roaming agreement, was also discussed. The theory here is great but significant challenges exist to provide integration and interoperability between MaaS solutions that are very much themselves in their infancy. There is also no clear emerging standard for this interoperability at present.

## Enabling data sharing and analysis

There was significant discussion around the sharing of both personnel and transit related data through APIs including the technical and legal challenges of doing so securely and reliably. It was great to see initiatives such as the Rail Data Marketplace gaining momentum to facilitate the discovery and sharing of rail related data from many different sources. The Rail Data Marketplace is currently in private Beta but moving to public Beta in April 2023.

The sharing of personnel data was also a common topic of discussion as was related legislation such as the Data Protection & Digital Information Bill. There is a growing understanding that providing true MaaS and shared urban mobility solutions across wider geographical areas potentially requires significant gathering and sharing of personnel data which presents a number of challenges around the ownership and security of that data.

There were also a number of discussions on how best to collate and analyse the growing amount of transit data related available related to customer journeys to aid better and more efficient infrastructure planning and service roll-outs. It appears there is still a significant amount of 'guess' work in the industry in terms of understanding customer needs.

## Case Studies

The event showcased global projects bringing insight into the wide range of challenges that transit agencies have around the world. The range of different approaches to solve local challenges in innovative ways and the clever use of technology, was a breath of fresh air to many in the audience. Stand out presentations included:

'Tagless' Fare Payment for Public Transport in a Megacity 'Seoul' from Joanne Yu at T-Money, talking about their Be In Be Out' trials. This provided deep insight into the innovation deployed and was very honest around some of the challenges to adopting BIBO-based solutions.

"Beyond the idea of transportation ticket in the time of Smart City development in Taiwan" from Ting Chen and Ivan Chiu, from EasyCard. Whilst much of the rest of the world is making a headlong dash to open loop, EasyCard are exploiting the potential of their closed loop solution developing new use cases and promoting the card through various means, including creating the card in collectable form factors. They were enthusiastic and engaging as presenters, showing real passion to drive integration of services beyond just transit ticketing, in areas such as retail, financial social inclusion, social services payments and ID.

## New Concepts and Technologies

It was great to see a number of innovations and emerging touch-less ticketing solutions not only being discussed at the event but actually being rolled out in successful user trials, globally. So-called Be in, Be out (BIBO) solutions are starting to gain traction. These use Bluetooth Low Energy (BLE) technology on mobile devices communicating with a multitude of beacons in locations such as buses and train stations to automatically identify and validate ticket holders without the requirement for any direct interaction with the user or use of barrier/gates etc. For example, the Seoul public transit authority plans to expand their current BIBO-based trial to a full public launch by 2025. It was also great to see smaller technology providers such as [ZED Digital](#) showcasing solutions in this space.



Listening to a number of presentations on this topic, it's clear this technology has huge potential to both reduce cost and improve the passenger user experience but there are still clear technological challenges to overcome here, particularly around the placement and configuration of BLE beacons to accurately and reliably identify users, particularly in very busy environments. The theme of social inclusion becomes very relevant here in that there are obviously a significant number of travellers who for various reasons would not be able to utilise this kind of solution.

On the devices side, it was encouraging to see a growing number of providers of ticket validating devices and solutions improving the portability and functionality of devices, including supplementary features such as the ability to photograph/log incidents directly from the device. This is an attractive proposition for example, smaller bus/tram operators whereby drivers and conductors can re-utilise these devices to easily capture and log faults and issues with their vehicles.



## Announcements

A selection of event related announcements and news articles that caught our eye:

### Payment Solutions

[The Future of Ground Transportation Payments](#)

[Klaipeda, Lithuania to pioneer contactless payments in public transportation with Ridango technology](#)

[Tampa Bay transit authorities roll out open loop contactless ticketing with fare capping](#)

### Innovations

[Vix Technology and Transport for Wales partner to launch new digital-first smart gate in UK](#)

[DDOT adopts Token Transit app for mobile ticketing](#)

[STM and Transit test new AI-based tool to monitor bus detours](#)

### Validator and Payment Devices

[Ridango's DV21R Validator: The Advanced Ticketing Solution for Public Transport](#)

### Encouraging ridership

[RTA reports 35% increase in Dubai's public transport ridership in 2022](#)

[It's no secret that the bus and motorcoach industry continues to emerge from the shadow of the Covid-19 pandemic.](#)

## **Transport Authorities and Infrastructure**

[Arriva awarded €300 million contract for bus and rail services in The Netherlands](#)

[USDOT partners with City of Austin for innovative infrastructure projects](#)

[TfL's new real-time information Countdown boards to make bus travel easier](#)

[TfL proposes enhancements to bus services in outer London](#)

[Go-Ahead celebrates 20% increase in women bus drivers in UK](#)

[Transport Scotland report recommends changes to enhance women's safety on transit](#)

[FlixBus and Belle Vue launch new cross-country coach service in UK](#)

[Solent Transport becomes first UK local authority with rail ticketing accreditation](#)

## **Regulation and Policy**

[Call for regulatory regime around remote driving technology](#)

## **MaaS and Shared Urban Mobility**

[Making MaaS a more attractive user experience](#)

[FlixBus and Greyhound launch shared booking platform for inter-city travel in North America](#)

[King County Metro unites on-demand services under Metro Flex](#)

[MaaS: A piece of the mobility integration puzzle for a richer transport experience](#)

[Transdev: The first MaaS operator in the world](#)

## **Reducing Environmental Footprint**

[UK government funding to bring zero-emission buses to Northern England's roads](#)

[Yutong Delivers First Electric City Bus to Saudi Arabia](#)

[First Bus to Deploy an Additional 117 Wrightbus Electric Buses](#)

[Construction begins on WMATA's second zero-emission bus facility](#)