FirstPartner | NEWSLETTER

Highlights from Transport Ticketing Global 2025

The FirstPartner transit and payments 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 4th and 5th March 2025.

The event brought together a diverse audience from across the mobility sector, facilitating insightful discussions on the latest trends and innovations in transit ticketing, fare collection, and mobility solutions.

The exhibition floor featured leading industry players showcasing their latest innovations. Companies such as Indra, Hitachi, Masabi, Cubic Transportation Systems, and Littlepay demonstrated cutting-edge solutions in contactless ticketing, account-based ticketing, and secure fare payment methods. Many exhibitors focused on enhancing social inclusion in mobility, ensuring that transport solutions remain accessible and affordable to all.

Attendance at the event this year, increased to over 1500 attendees – the largest ever audience at this event with representatives from 65 different countries. The event also featured 145 speakers from across the globe.

The event also hosted the thirteenth annual Transport Ticketing Awards. With around 250 attendees celebrating achievements in the transit and ticketing ecosystem 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. New categories

this year included Supplier Innovation, Best Commercial Strategy Initiative and Best Smart Ticketing Programme for > that 1 million journeys.

FirstPartner's Transit Ticketing team spent considerable time talking to vendors, service providers, payment scheme providers and operators over the two days and overall there was a positive, highly motivated feel within the industry. Attendees were very excited about the possibilities of technological advancements in this space including Artificial Intelligence (AI) to improve both traveller customer experience and to reduce fraud/fair evasion which again, based on our discussions at the event continues to challenge the industry.

There was still a feeling of frustration from Transport Operators and Authorities that the integrations of payment and ticketing systems remain far too complex and time consuming, but also optimism that initiatives such as Open Data Architecture and the increased availability of cloud based 'as a service' solutions will go some way towards addressing this.

It was also clear that local government is becoming considerably more 'cost conscious' when it comes to spending in the sector and that this reduction in spending is happening relatively fast. This is helping to drive the need for less complex, more cost-effective transit and ticketing solutions and deployments.

Some of FirstPartner's thoughts and discussions on these topics are summarised below. 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. We support clients in all aspects of business and technical consulting and qualitative research in transit ticketing, cEMV, mobile ticketing, ABT, procurement and deploying new digital services and products.

The Role of AI in Transport and Ticketing

One of the major themes of the event was the growing role of AI in transport ticketing, notably how AI-driven analytics and automation can enhance fare management and operational efficiency. AI enabled solutions deliver more meaningful insights from transit data that can, for example, help combat fare evasion (see below). The need to both analyse and fuse huge volumes of data from multiple sources means AI-based approaches are the only really viable option.

Sessions such as *How AI is Revolutionizing the Future of Ticketing and Fare Collection* by Cubic Transportation Systems and *Practical Uses of AI to Increase Transport Patronage* by Northeastern University also highlighted AI's potential to improve ridership and customer experience. This includes enabling new and improved traveller services such as better travelling 'companions' that offer advice and guidance on travel and ticket options and better Mobility as a Service solutions.

The complimentary role of blockchain technology in ticketing was explored in *Blockchain and AI: The Ticket to a Technological Triumph?* by the University of Birmingham.

In the future, AI has the potential to reduce fare evasion and associate 'risk' to a level that would significantly reduce the friction of current travel by for example removing more physical barriers and gates. It is however clear that there is some significant way to go before this becomes a reality.

Fare Evasion and Revenue Protection

Another key theme dominating the event was fare evasion, a problem which currently costs transit agencies billions annually. This has created a critical need for effective enforcement without disrupting passenger flow. There were a number of insightful sessions on this topic including *Transport for London - Reducing Fare Evasion: Understanding Behaviours* and *Strategies for Revenue Protection in Public Transport Systems.* This featured insights from global transit operators, including Translink Vancouver and the Toronto Transit Commission.

In the UK, rail Fare Evasion costs the industry a staggering £240m a year, accounting for approximately 4% of revenues. In many countries this percentage is significantly higher, notably where there are large communities who simply can't afford current rail fares, raising the related theme of social inclusion (see below).

Whilst the industry acknowledges that this is a significant issue, there was positive sentiment that as well as helping to identify evasion, AI driven data analytics allow operators to gain clearer and more granular insights into the root causes. This facilitates a more targeted prevention approach, for example by identifying and directing enforcement to notably vulnerable gates, stations, and travel routes. Increased deployments of biometric technologies are also helping in some areas but the cost of deployment and fears over data privacy can be a barrier to more widespread deployment. Techniques to deter fare evasion including warning sounds, lights at gates etc. can be effective, but it is also important to reward positive behaviour.

The need for better data analysis and sharing of fare evasion data and insights on a more international scale was highlighted, but issues over data sovereignty and data protection are clearly hurdles to overcome.

# Transport and Ticketing Innovations

Alongside the AI based solutions already discussed, Ultra-wideband (UWB) is gaining traction as a technology that promises to improve travellers' user experience by allowing them to simply approach

and walk through fare gates without actively presenting tickets, cards or mobile devices to a reader. NXP launched a successful trial of this solution in Shenzhen, China last year with more trial deployments planned for 2025. The technology seems to be proving effective but currently utilises separate UWB-enabled smart tickets.

There is still further work to do on the integration side to allow customers to use the UWB capabilities of their own mobile devices. These should start to become a reality over the next 12 months.

Our observation is that UWB appears to be gaining favour over Bluetooth LE as the preferred technology for these so called Be In-Be Out solutions as it can offer a better user experience with no need for users to enable Bluetooth on their devices.

It was also interesting to see increased deployments of ticketing solutions that do not rely on any form of fixed gate infrastructure. The Smart Mobile Ticketing solution from Fairtiq for example is a mobile app-based solution that utilises GPS to track journeys and charge accordingly.
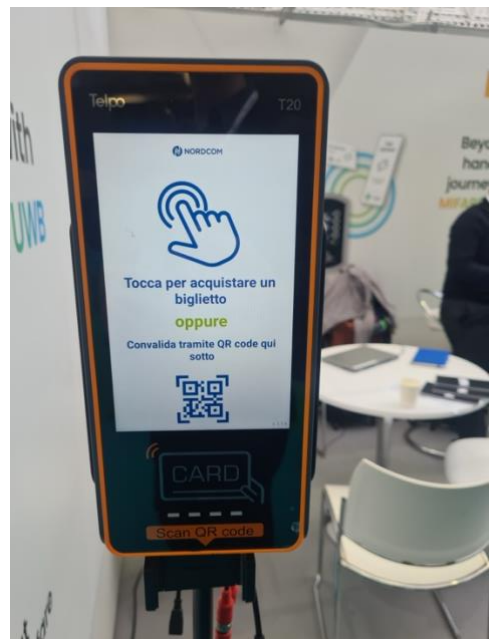
There were also an increasing number of companies offering ticket validation hardware that also incorporate camera-based biometrics to identify travellers and to reduce fare evasion.

Android continues to find favour as the operating system of choice supporting the latest generation of ticket validator and payment devices from both established and emerging vendors such as WizarPOS . It was also great see the likes of smaller players such as ID Tech continue to push payment and ticket validator devices and innovations to meet transit authority specific needs more quickly than some of the larger players in the market.

There was also a notable increase in Software as a Service (SaaS) solutions being showcased with traditional on-premise IT solutions being offered as cloud-based, subscription services. These offer quicker deployment and integration times as well as more flexible pricing structures. A good example of this was the Ticketing-as-a-Service (TaaS) solution from Init.

Smart and Digital Ticketing

TTG 2025 saw mobile and digital ticketing starting to become the default, rather than card-based. This was both on the exhibition floor and in the presentations.

The high cost of physical card issuance and maintenance of acceptance infrastructure, is driving transit agencies to move to digital issuance implemented through virtual cards, deployed via mobile apps and in the major mobile wallets, from Apple and Google.

Tim Jefferson of FirstPartner chaired an in-depth panel on Day 1 of the conference on "Mobile as a Revolution or Barrier?" With three transit agencies and a technology vendor on the panel, this drew a large crowd and interesting and thought-provoking debate. The number one message and take out from the panel, was "one size does not fit all", meaning that different parts of the customer base want and need different types of ticketing. Mobile is the main

channel for most transit operators, but that could be virtualised cards in an app or mobile wallet or QR codes. Lower costs (both capex and opex) and customer experience are the key drivers. However, social inclusion is essential, so card, paper or plastic, will need to remain for some users.

White labelled EMV

White Label EMV, or closed loop EMV, where transit agencies issue EMV based cards and mobile based virtualised card solutions gained real traction at the event this year.

Peter van Dijk and Bas van Weele from TransLink in the Netherlands spoke about their new OvPay national roll out of Thales provided EMV white label cards to replace their existing OV-chipcard base. This will be the first truly national roll out of EMV technology, larger than those in Stockholm and New York. Bas Van Weele, cited the low per card and transaction costs, versus MiFare as the rationale along with the fact that TransLink has built an EMV based back office and had a very successful 2024 launch of cEMV bank card acceptance.
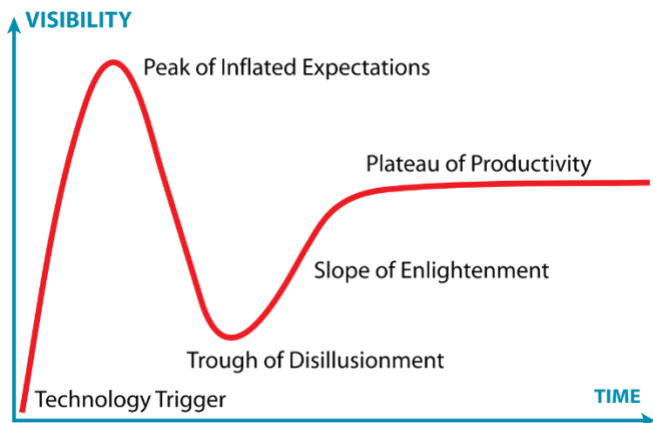

FirstPartner is supporting MARTA, in Atlanta in the US with their new closed loop EMV card based roll out, replacing their existing MiFare based cards, whilst they move to a new ABT back office. This is driven by lower costs, removal of technology lock in and simpler mobile wallet integration. The fact that EMV closed loop cards can be topped up at any normal retail top up network, such as InComm in the US, further reduces costs and complexity for the transit agency and provides much more choice of top up locations for passengers.

We see a very real trend with other transit agency and technology vendor clients looking to move to EMV based cards, with the global card supply chain driving down cost, the ease of mobile wallet integration and also the fact that most are already accepting cEMV bank cards, so sweating existing ABT back-office infrastructure.

Mobility as a Service (MaaS)

It is clear that the idea of Mobility as a Service (MaaS) has, over the last few years, experienced the classic Gartner hype-cycle

The Technology Trigger was the emergence of mobile ticketing which in turn enabled the bringing together of journey planning and ticketing into a single app. During the Peak of Inflated Expectations, the excitement around 'all you can eat' subscriptions and 'bundles' of travel entitlement ran well ahead of the ability of Authorities and Operators to reach the necessary commercial agreements, and of the attractiveness of such products to consumers. At TTG 2022 and 2023, MaaS presentations told compelling stories of turning the tide of private car use. Last year was probably the time of the 'Trough of Disillusionment'. Many schemes experienced low take up, and were struggling to offer a compelling proposition. With apps like Google Maps able to offer multi-modal journey planning, and with ticketing increasingly being 'tap and go' with a contactless payment card, the question arose, 'what exactly is a MaaS app for?'. As we now move up the Slope of Enlightenment, use cases are emerging that demonstrate that local or regional MaaS apps offering planning and ticketing can be of real value. Solent Transport's presentation of their work with Mobility Credits is an example. Mobility Credits delivered through a Transport Authority sponsored app provide an Authority with a very real capacity to encourage behavioural change. Loyalty schemes sponsored by the Transport Authority and/or Operators working in partnership can do the same. Both Enhanced Partnerships and Franchising provide a platform on which propositions such as these can be built. So, whilst the idea that MaaS apps can be financially self-sufficient or even profitable probably has been demonstrated to be unachievable, what remains is a tool that can make a real contribution to the achievement by Authorities of their transport policy objectives.

Social Inclusion

Social inclusion and recognition that the transit and ticketing sector has a significant responsibility to make travel easier and more inclusive for all continues to be a key theme at TTG. This is clearly an issue at the local level where local authorities are trying to target specific parts of their communities that struggle to effectively utilise public transport, but also at a global level where there are large groups of potential travel users struggling, largely due to cost.

Whilst it is great to see announcements and solution developments providing new smart/digital ticketing services, there is still a significant need to support 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'.

On a positive note, it was great to hear how the UK-government backed Passenger Incentive Programme from Transport for West Midlands that offers free and discounted travel for different user groups was really starting to make public transport more accessible for certain user groups and also help to support a shift away from private vehicle usage.

From a regulatory perspective, it was also really positive to see that in the UK, the Accessible Information Regulations (AIR) legislation is starting to improve accessibility to information for all bus and coach users and helping to drive innovation in this area.

Announcements

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

Artificial Intelligence (AI)

Cubic Transportation Systems Announces FEnX The Next Generation of Fare Gates Advancing Revenue Protection, Accessibility and Safety

Cubic Transportation Systems Announces UK Innovation Centre to Explore Artificial Intelligence and Machine Learning's Role in the Future of Public Transit

London Tube Uses AI For Passengers Safety

Rail Infrastructure and Networks

HSRG responds to HS2: Update following the Northern leg cancellation

UK company partners with US Railroad Development Corporation

Big infrastructure investment plans take shape in America

European rail CEOs set Strategic Vision & Key Priorities for 2025

RIA responds to rail reform consultation

Network Rail Property digital programme gains industry system integrator

Mayors and devolved authorities must be empowered to deliver transformational local rail services in upcoming legislation, report urges

From backwater to hotspot: how HS2 could bring £10bn economic boost to Old Oak Common

BREAKING NEWS: Dubai moves forward with new Gold Line metro link

Automotive

NYC Congestion Relief Zone Set to Generate $500 Million by 2026

Department of Transportation Rescinds Support for NYC Congestion Plan

Bus

Spending Review: Plug £452 million bus pass shortfall to boost economy and protect routes

Bus funding deal due ahead of franchising decision

Mobility as a Service (MaaS)

Siemens Mobility Partners with RTC for MaaS Application in Québec

Future Transport Innovations

US: AECOM Awarded $27 Million Contract by Caltrans

UK: TfL Begins Electric Construction Vehicle Trial

Canada: Greenline Identifies Landing Site for Battery-Electric Ferries

LODD & Skyports Unveil Vertiport Designs for Key UAE Locations

US: May Mobility Launches Fully Autonomous Ride Service in Georgia

Jet Systems and Volocopter to Partner in eVTOL Operations in France

Event Insight: Sreekar Dhulipudi

TTG 2025 provided excellent networking opportunities, allowing me to engage with solution providers, operators, regulatory authorities, and fellow consultants. The pre- and post-event networking sessions, including the Masabi Drinks gathering, offered a valuable platform to exchange ideas and discuss industry developments. I had the privilege of speaking with Ben Whitaker from Masabi, gaining insights into their novel SaaS licensing models that are transforming ticketing accessibility for transit agencies worldwide.

Having attended various industry events in the Middle East, and South-East Asia, such as Transit Ticketing and Fare Collection, Middle East Rail, Mobility Live, and Asia Pacific Rail etc., I found TTG 2025 to be uniquely global. The event's diverse audience and its emphasis on innovation set it apart, making it a must-attend for professionals in the mobility sector.

As a first-time visitor to London, I was warmly welcomed by the city. While the late-winter breeze was quite challenging for someone from the GCC, a good pair of gloves ensured I navigated the experience comfortably. An added highlight was meeting many industry peers in person for the first time,

reinforcing the importance of such global gatherings in fostering professional relationships and knowledge exchange.

Overall, TTG 2025 was a highly valuable experience, offering deep industry insights, showcasing groundbreaking innovations, and enabling meaningful connections within the transport and mobility ecosystem. I look forward to future editions of this event and the continued evolution of ticketing and mobility solutions on a global scale.

Tim Jefferson from FirstPartner added:

"Great to have Sreekar in London at TTG 2025, he brings to FirstPartner a different view of transit ticketing and payments, with his in-depth knowledge, expertise and experience in the GCC region, India, the Malaysian peninsular and the Philippines.

This perspective is a value asset to not only those regions, but also in Europe and North America for our clients.

We are lucky to have such a talent to join the FirstPartner team."

About FirstPartner

FirstPartner is a specialist management consulting and research company that brings deep market expertise and clear recommendations to its clients. We deliver the insight, expertise and support that product, marketing, sales and management teams require to:

- validate market opportunities
- launch compelling digital products & services
- build engagement with customers & stakeholders

Founded in 2002, we are based in the UK, but serve clients and undertake consulting and research engagements across Europe, North America, MENA and Asia.

We have a focused transport and transit ticketing practice led by Tim Jefferson, that provides consultancy services to transit agencies, card payment schemes. merchant acquirers, banks and

technology vendors. We are subject matter experts in cEMV open payments, mobile ticketing, Account Based Ticketing (ABT) and White Label EMV.

We have unique current experience of defining and delivering cEMV open payments and White Label EMV ABT solutions in Europe, MENA and North America.

Tim Jefferson, Steve Howes, Sreekar Dhulipudi and Peter Thompson from FirstPartner all attended Transport Ticketing Global 2025, so if you would like to follow up with any of them, please contact Tim Jefferson at tjefferson@firstpartner.net.