AUTOMATED PASSENGER COUNTER AND PASSENGER INFORMATION SYSTEM MARKET

By Application (Railway, Roadway, Airway, & Waterway);
By System (Hardware, Software, & Services); By Component & Device; & By Geography

ANALYSIS AND FORECAST TO 2020
MarketsandMarkets is a global market research and consulting company based in the U.S. We publish strategically analyzed market research reports and serve as a business intelligence partner to Fortune 500 companies across the world. MarketsandMarkets also provides multi-client reports, company profiles, databases, and custom research services.

MarketsandMarkets covers fourteen industry verticals, including aerospace and defence, advanced materials, automotives and transportation, biotechnology, chemicals, consumer goods, energy and power, food and beverages, industrial automation, medical devices, pharmaceuticals, semiconductor and electronics, and telecommunications and IT.
1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

- To define, describe, and forecast the automatic passenger counting (APC) and passenger information system market on the basis of technologies, components & devices, applications, services, and geography
- To provide detailed information regarding the major factors influencing the growth of the market (drivers, restraints, opportunities, industry specific challenges, and burning issues)
- To strategically analyze the micromarkets¹ with respect to the individual growth trends, future prospects, and contribution to the total market
- To analyze the opportunities in the market for the stakeholders and detail the competitive landscape in terms of the market leaders
- To forecast the size of the market segments with respect to four main geographies, namely Americas, Europe, Asia-Pacific (APAC), and Rest of the World (RoW)
- To strategically profile the key players and comprehensively analyze their market shares along with their core competencies² in the APC and passenger information system market
- To track and analyze the competitive developments such as joint ventures, collaborations, agreements, contracts, partnerships, mergers & acquisitions, and new product developments, along with research and development in the APC and passenger information system market
- To use the Porter’s five forces framework to gauge the entry-barriers in this market, along with the analysis of the value chain, and to identify the technologies and market roadmaps to study the evolution & timeline of the APC and passenger information system market

¹. The micromarkets are defined as the further segments and sub-segments of the APC and information system market included in the report.
². The core competencies of companies are captured in terms of their key developments, SWOT analysis, and key strategies adopted by them to sustain their position in the market.
1.2 MARKET DEFINITION

APC is an electronic device which accurately records boarding and alighting data of transit vehicles including buses and trains. It improves the accuracy and reliability of tracking transit ridership over traditional methods of manual accounting by drivers.

Passenger information systems are the set of IT systems, hardware, and services which provide real-time information about the arrival and departure of transport mediums to the passengers. It offers other features such as scheduling information, entertainment, news broadcasts, and emergency communication services.

1.3 MARKETS COVERED

This research report categorizes the APC and passenger information system market into two segments, namely applications, which comprise railways, roadways, and waterways, and geography; while the PIS market covers systems, devices & components, applications, and geography.

FIGURE 1 ASSENGER INFORMATION SYSTEM MARKET, BY SEGMENT

APC and information systems market, by geography

Americas

- North America
  - Canada
  - Mexico
  - The U.S.
- South America
  - Brazil
  - Argentina
  - Others (Colombia, Venezuela, Chile and Peru)
Europe
- France
- Germany
- Italy
- The U.K.
- Others

APAC
- China
- Japan
- India
- South Korea
- Others

RoW
- Middle East
- Africa

1.4 Stakeholders
- Semiconductor and electronics component manufacturers
- Gateways suppliers
- Original equipment manufacturers (OEMs) of APC
- Storage devices and server providers
- Fleet owners who installed APCs
- Distributors and retailers
- Research organizations
- Technology standard organizations, forums, alliances, and associations
- Technology investors
- Passenger information systems software providers
- Hardware component providers
- Networking and communication services providers
- System integrators
- Public transport service providers
- Transport operations management solution vendors
- Infrastructure hardware and devices suppliers
- Mobile application developers
1.5 YEARS CONSIDERED
- Historical Year—2012
- Base Year—2013
- Forecast Year—2014 to 2020

1.6 CURRENCY
The currency used in the report is the U.S. dollars with market size indicated only in $ million.
- For companies reporting their revenue in the U.S. dollars, the revenue has been picked up from their annual reports.
- For companies reporting their revenue in other currencies, the average annual currency conversion rate has been used for the particular year to convert the value into the U.S. dollars.
- For all historical and current exchange rates required for calculations and currency conversions, the OANDA website has been used in this research study.

1.7 LIMITATIONS
- In the technology segment, the study is limited to IR, laser, and time-of-flight technologies.
- The market size in terms of million units is given only for the APC market and not for the PIS market.
2 EXECUTIVE SUMMARY

The report talks about two different technologies in the transportation system scenario, which are passenger information system (PIS) and automated passenger counters (APC). Each of these technologies is summarized in the sections below.

2.1 AUTOMATED PASSENGER COUNTER MARKET

The automated passenger counters are electronic devices that are used to count passengers that board and disembark a vehicle (buses, trams, trains, and ferry boats). APCs are increasingly used as an alternative to manual passenger counting in North America and Europe. They provide data periodically and help in data analysis at finer levels as compared to the manual counting. The transit agencies and fleet owners in the U.S. are increasingly utilizing the data generated from the APCs for ridership analysis and NTD reporting. This helps them to avail funding from the federal government. The APC data is used to generate and study ridership trends and patterns, and this helps in the planning and scheduling of operations as well as taking key decisions such as allocation of resources, ticket revenue sharing, taxing on the tickets, and addition or elimination of a service. The technology used in the APC systems has evolved and the latest systems boast accuracy of over XX%. The technology has become more accurate, reliable, and has been accepted in the industry. The latest APC systems are mostly based on the active IR technology. The key players in the market include Eurotech SpA (Italy), iris-GmbH (Germany), Urban Transportation Associates, Inc. (U.S.), DiLAX Intercem GmbH (Germany), and HELLA Aglaia Mobile Vision GmbH (Germany), among others.

FIGURE 2 GLOBAL AUTOMATED PASSENGER COUNTER MARKET, BY APPLICATION, 2014

Source: SEC Filings, Investor Relations Presentations, Annual Reports, Company Websites, Secondary Research, Expert Interviews, and MarketsandMarkets Analysis
In this report, the global automated passenger counter market is classified into three major applications, namely roadways, railways, and waterways. The APCs installed in the buses and other roadway transportation systems account for the largest market share of ~XX% in 2014 and are estimated to grow at a CAGR of XX%, between 2014 and 2020. The total number of passengers traveling by roadways is comparatively much higher as compared to any other transport system and so, the installations of APCs in this application are also higher. The waterways application of the APC market is expected to grow at the highest CAGR of XX%, between 2014 and 2020.

**FIGURE 3**  GLOBAL AUTOMATED PASSENGER COUNTER MARKET SHARE, BY REGION, 2014

Source: SEC Filings, Investor Relations Presentations, Annual Reports, Company Websites, Secondary Research, Expert Interviews and MarketsandMarkets Analysis

Americas comprising North America (U.S., Canada, and Mexico) and South America (Brazil, Argentina, and others) accounted for the largest share of ~XX% in 2014 of the global APC market. Factors such as urbanization and digitization are responsible for the huge market share of the Americas in the APC market. APAC is expected to be the fastest growing region, owing to the huge investments by the countries in APAC for the urbanized and better transport systems; security in the transport systems is also one of the major concerns for countries in APAC.

The figure above also represents the fastest growing nations in the APC market. Countries such as India, China, Japan, and South Korea are some of the fastest growing nations, globally, in 2014.
2.2 PASSENGER INFORMATION SYSTEMS MARKET

Passenger information systems are observing a lot of traction, which is primarily being driven by the rise of urbanization. Passengers, nowadays, demand for real-time information about the arrival and departure time of the transport mediums and want to stay connected all the time. These solutions offer information in real-time, which help to enhance the passenger experience and hence, increase passenger retaining. These solutions provide connectivity between the passengers and the transport services. With the increasing number of passengers in public transport, the installation of PIS solutions are now becoming quite common.

Passenger information systems are one of the smart traffic solutions which offer better and greater efficiencies and reduce the operational costs of the transport service providers. PIS solutions create a network between the passengers and transport service providers. This network is the backbone of the entire solution. With the emergence of the new telecommunication technologies, accessibility of information and the ability to stay connected on the move has been enhanced significantly. Network and communication service providers are also working with transport service providers to offer robust networks so that PIS solutions can rely on.

This report focuses on the global PIS market across end-users, different modes of transportations, and geographic regions. The key segments included in the report are systems, devices & components, services (professional, integration, and cloud), modes of transportation (railways, roadways, & airways), and regions (North America, Europe, APAC, MEA, & Latin America). This report also emphasizes on the upcoming trends, drivers, restraints, and opportunities in this market. As per the research, the total PIS market is expected to grow from $XX billion in 2014 to $XX billion by 2020, at a CAGR of XX% during the forecast period.

**FIGURE 4** PASSENGER INFORMATION SYSTEMS MARKET, BY TYPE, 2014 VS 2020

Source: SEC Filings, Investor Relations Presentations, Annual Reports, Company Websites, Secondary Research, Expert Interviews, and MarketsandMarkets Analysis

It is expected that the PIS market would gain a high traction across the globe in the near future. As the demands for connectivity on the go, real-time information, and infotainment are increasing, the adoption rate would be higher as compared to the past. With the advent of new technologies, vendors are expected to come up with new and more capable solutions.
It is estimated that the IT systems market is expected to grow from $XX billion in 2014 to $XX billion by 2020, at a CAGR of XX% during the forecast period.

**FIGURE 5 PASSENGER INFORMATION SYSTEMS MARKET: SHARES AND SIZE SNAPSHOT**

In the passenger information systems market, the share for the information display systems segment was ~XX% in 2014; it was valued at a market size of $XX million in the same year and is expected to reach $XX million by 2020. The fastest growing segment in the PIS market is the mobile application, which is expected to grow at a CAGR of XX% between 2014 and 2020. This is because mobile devices have become a part of life and it is much easier to get information such as the schedule of trains, planes, or buses on mobile devices by means of an app, or through calls, text messages, or e-mails.
The North American region is expected to grow with a market share of XX% and at a CAGR of XX% between 2014 and 2020. The PIS market is expected to grow in Europe and APAC at a favorable CAGR due to the increasing demand for transport solutions and telecommunication in the transport industry. As public transport is highly used in the European and APAC regions, the need for passenger information system would grow in the coming years.
Disclaimer: MarketsandMarkets strategic analysis services are limited publications containing valuable market information provided to a select group of customers in response to orders. Our customers acknowledge, when ordering, that MarketsandMarkets strategic analysis services are for our customers' internal use and not for general publication or disclosure to third parties. Quantitative market information is based primarily on interviews and therefore, is subject to fluctuation.

MarketsandMarkets does not endorse any vendor, product or service depicted in its research publications. MarketsandMarkets strategic analysis publications consist of the opinions of MarketsandMarkets' research and should not be construed as statements of fact. MarketsandMarkets disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

MarketsandMarkets takes no responsibility for any incorrect information supplied to us by manufacturers or users.

All trademarks, copyrights and other forms of intellectual property belong to their respective owners and may be protected by copyright. Under no circumstance may any of these be reproduced in any form without the prior written agreement of their owner.

No part of this strategic analysis service may be given, lent, resold or disclosed to non-customers without written permission.

Reproduction and/or transmission in any form and by any means including photocopying, mechanical, electronic, recording or otherwise, without the permission of the publisher is prohibited.