Description:

Report coverage

Historical market size for the period 2012-2014 and forecast for the period 2015-2020.
Number of cards in circulation, and value and volume of transactions.
Number of terminal, and value and volume of transactions.
Industry trends, drivers, and opportunities.
Competitive landscape of card issuers for both, debit cards and credit cards.
Major schemes, debit and credit cards by customer segments.

Research Methodology

The study is based on extensive secondary and primary research. The various sources studied during the secondary research include websites of payment/banking/industry associations, industry regulatory bodies, banks, and card issuers. The primary research included in-depth interviews with industry experts and key opinion leaders.

Singapore cards and payments market overview

In terms of number of cards in circulation, the Singaporean payment cards market grew at a CAGR of 3.3% during the period 2012-2014. In Singapore, debit cards dominate the payment card market in terms of number of cards in circulation.

The debit cards in Singapore recorded an increase in average transaction value (ATV), which increased from SGD 191.1 in 2012 to SGD 196 in 2014. The frequency of debit card use grew at a CAGR of 2.6% during 2012-2014. The frequency of transaction is further expected to reach up to 48.4 times a year by 2020. By scheme, the number of debit cards in circulation was dominated by NETS, followed by Visa in 2014. In debit card segment, DBS Bank was the leading card issuer, in terms of the number of cards in circulation in 2014.

In terms of the number of credit cards in circulation, United Overseas Bank was the leading player in Singapore. Credit card transactions were encouraged by growth in payment infrastructure, such as POS and ATM terminals, and promotional strategies adopted by banks, such as cash back offers and reward programs. Credit cards in the country are primarily used by customers at POS terminals for retail purchases, rather than for cash withdrawals at ATMs. The credit card market is concentrated in terms of transaction value, with the six leading issuers accounting for a market share of 85% in 2014. In July 2015, The Monetary Authority of Singapore implemented new rules for credit cards to help credit cardholders who have difficulty repaying their outstanding debt.

The average charge card transaction value increased from SGD 168.9 in 2012 to SGD 171.8 in 2014, at a CAGR of 0.8%. The average charge card transaction value is anticipated to grow at a CAGR of 1.4% during the future period of 2015-2020.

Key players in the Singapore cards and payments market:

DBS Bank
Oversea-Chinese Banking Corporation
United Overseas Bank
Citibank
Standard Chartered Bank
HSBC

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