Indonesia Cards and Payments Market - Size, Share, Development, Growth and Forecast to 2020

Description: 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.

Indonesia cards and payments market overview

In terms of number of cards in circulation, the Indonesian payment cards market grew at a CAGR of 10.3% during the period 2012 -2014. The pay now cards are the dominant payment cards in Indonesia. Growth in the Indonesian pay now card market has been relatively strong in terms of number of cards in issue, witnessing a CAGR of 11.9% during 2012-2014.

The percentage of the urban population in total population of the country grew from 51.3% in 2012 to 53% in 2014 and is expected to grow further over the forecast period, to reach 58% in 2020. The increase in urbanization is expected to lead to increase in card usage in the country.

The total number of credit cards in Indonesia increased at a CAGR of 2% during the period 2012-2014. The transaction value of credit cards reported at POS terminals was greater than at ATMs. The credit card turnover witnessed a CAGR of 7.2%, growing from IDR 13.9 in 2012 to IDR 16.0 in 2014.

In January 2016, UOB Indonesia announced the launch of travel-focused PRVI Miles credit card which caters to well-travelled Indonesians. In 2015, UOBI cardholders spent around IDR 800 billion abroad, an increase of 5% y-o-y. During their travels, cardholders spent the most on accommodation and fashion. Singapore and Thailand were among the top 5 destinations favoured by Indonesians travelling abroad. Card offers travel privileges across Southeast Asia which includes discounts with travel merchants such as Agoda, Expedia, as well as fashion, dining and hotel benefits at merchants across Singapore, Malaysia and Thailand.

In May 2015, Bank Mandiri signed an agreement with a Japan based international credit card payment services provider “JCB”, to allow acceptance of credit cards with JCB logo at the Bank’s ATMs and EDC machines. This alliance will allow JCB credit card holders to make withdrawals, transfer money and make purchases through Bank Mandiri’s EDC machines and ATMs. Also the bank foresees to issue JCB logo bearing credit cards as well.

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

Key players in the Indonesian cards and payments market:

Bank Rakyat Indonesia
Bank Central Asia
Bank Negara Indonesia
Bank Mandiri
HSBC

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