

Saudi Arabia Passenger Information System Market By Component (Hardware, Software, Services), By Location (On Board, In Station), By Transportation Mode (Railways, Roadways, Airways, Waterways, Others), By Functional Mode (Multimedia Displays, Audio Systems, Computing Systems, Networking and Communication Devices, Video Surveillance, Content Management System, Others), By Region, Competition, Forecast and Opportunities 2020-2030F

Market Report | 2025-02-17 | 85 pages | TechSci Research

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Report description:

Saudi Arabia Passenger Information System Market was valued at USD 110 million in 2024 and is expected to reach USD 213.27 Million in 2030 and project robust growth in the forecast period with a CAGR of 11.5% through 2030. The Saudi Arabia Passenger Information System (PIS) market is currently experiencing significant growth and expansion. This growth can be attributed to several key factors. Firstly, the Saudi government's commitment to enhancing its transportation infrastructure, particularly in the form of the Vision 2030 initiative, has led to substantial investments in the development and modernization of transportation systems. As part of this initiative, there is a strong emphasis on improving the passenger experience, which has spurred the demand for advanced PIS solutions. The increasing urbanization and population growth in Saudi Arabia have intensified the need for efficient and reliable public transportation systems. Passenger Information Systems play a pivotal role in providing real-time information to commuters, enhancing their overall travel experience, and helping to alleviate traffic congestion. Additionally, technological advancements and innovations in PIS, including digital displays, mobile apps, and data analytics, have further fueled the market's growth. These systems not only provide timely information on schedules and routes but also enable passengers to plan their journeys more effectively. As a result, both government authorities and transportation service providers are increasingly adopting PIS solutions to meet the rising expectations of modern travelers.

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Key Market Drivers

Government Initiatives and Vision 2030

One of the primary drivers behind the robust growth of the Passenger Information System market in Saudi Arabia is the unwavering commitment of the government to improve the nation's transportation infrastructure. The cornerstone of this effort is the Vision 2030 initiative, an ambitious plan aimed at diversifying the Saudi economy and reducing its dependence on oil revenues. A fundamental component of this initiative is the development and modernization of transportation systems throughout the country. As part of Vision 2030, the government has allocated substantial investments to enhance public transportation and create a more connected and efficient network. In alignment with this vision, the government has recognized the importance of improving the passenger experience for both local residents and tourists. This is where Passenger Information Systems come into play. PIS solutions provide real-time information to passengers, including schedules, route details, and any disruptions, making it easier for individuals to plan their journeys. By ensuring a more seamless and convenient experience for passengers, the government can encourage greater use of public transportation, reduce traffic congestion, and enhance overall mobility within the Kingdom. The Saudi government is investing over USD 20 billion into the country's transportation infrastructure as part of Vision 2030. This includes developing and modernizing existing infrastructure, which is expected to boost the demand for PIS technologies in airports, metros, and buses.

Technological Advancements and Innovation

The rapid pace of technological innovation has significantly impacted the evolution of Passenger Information Systems in Saudi Arabia. Advanced digital signage, mobile applications, and data analytics are revolutionizing the way passengers access and utilize transportation information. These innovations are in high demand among both government authorities and transportation service providers. Digital displays at stations and stops provide real-time information, from estimated arrival times to service disruptions. Mobile apps offer commuters the convenience of personalized travel planning and updates on the go. Data analytics help transportation operators optimize routes and schedules based on passenger usage patterns, leading to more efficient and cost-effective services. As technology continues to advance, PIS solutions are becoming more sophisticated and responsive, further enhancing the passenger experience. The NEOM project, which is a USD 500 billion smart city, will likely see a significant integration of Passenger Information Systems (PIS) to provide seamless travel experiences for residents and visitors.

Rising Expectations of Modern Travelers

The expectations of modern travelers have shifted significantly, with an increasing emphasis on convenience, accessibility, and real-time information. Passengers now expect a seamless and stress-free journey, and the demand for responsive, passenger-centric services is on the rise. Passenger Information Systems meet these expectations by providing travelers with accurate, up-to-the-minute information. Whether it's tracking the location of a bus, accessing real-time traffic updates, or receiving alerts on delays or disruptions, PIS solutions empower passengers to make informed decisions about their journeys. This enhanced level of service not only attracts more riders to public transportation but also helps build a positive image of transportation providers and the government, further fostering trust and satisfaction among passengers. The expansion of these airports is part of a larger USD 5 billion investment in Saudi Arabia's aviation sector, which is expected to drive demand for innovative PIS solutions that enhance passenger experience and improve operational efficiency.

Business Opportunities

The Saudi Arabia Passenger Information System (PIS) market is being driven by a multitude of business opportunities that are emerging in the country. These opportunities are creating a favorable environment for the growth and adoption of advanced PIS solutions. The rapid expansion of the transportation infrastructure in Saudi Arabia is a key driver of the PIS market. The government has been investing heavily in the development of airports, metro systems, and other transportation networks to accommodate the increasing passenger traffic. This expansion creates a significant demand for efficient and reliable passenger information systems that can enhance the overall travel experience. PIS solutions provide real-time information on schedules, delays, and other relevant details, enabling passengers to make informed decisions and improving their overall satisfaction. The Saudi government's focus on enhancing the tourism sector is another important factor driving the PIS market. The country has been actively promoting tourism and attracting international visitors through initiatives such as the "Saudi Vision 2030" and the "Red Sea Project." These efforts have resulted in a surge in tourist arrivals, necessitating the implementation of advanced PIS solutions to cater to the needs of these travelers. PIS systems can provide multilingual information, wayfinding assistance, and

other services that enhance the tourist experience and contribute to the growth of the tourism industry. The increasing adoption of smart city initiatives in Saudi Arabia presents significant business opportunities for PIS providers. The country is embracing digital transformation and leveraging technology to improve the quality of life for its citizens and residents. As part of this transformation, smart transportation systems are being implemented, which rely on PIS solutions to provide real-time information to commuters and travelers. These systems not only improve the efficiency of transportation networks but also contribute to reducing congestion and enhancing overall mobility. Moreover, the growing emphasis on customer satisfaction and experience is driving the demand for PIS solutions in Saudi Arabia. Businesses in the transportation sector, including airports, railways, and bus operators, are recognizing the importance of providing seamless and personalized services to their customers. PIS systems play a crucial role in achieving this objective by delivering accurate and timely information, enabling passengers to plan their journeys effectively and minimizing disruptions. Saudi Arabia is focusing on becoming a major tourism destination under Vision 2030, aiming to increase the number of tourists from 18 million in 2019 to 100 million by 2030.

Key Market Challenges

Infrastructure Development

One of the foremost challenges in the Saudi Arabia PIS market is the need for concurrent infrastructure development to support advanced passenger information systems fully. While the government has been committed to enhancing transportation infrastructure through the Vision 2030 initiative, the pace of development must match the growing demand for passenger information solutions. Building the necessary infrastructure, such as digital signage, mobile connectivity, and data communication networks, to support modern PIS technologies can be a complex and costly endeavor. The challenge lies in synchronizing infrastructure projects with the deployment of PIS to ensure seamless integration. Delays or inefficiencies in infrastructure development can impede the effectiveness of PIS, as these systems rely on real-time data exchange and reliable connectivity. Coordinating these efforts is crucial to creating a robust and functional passenger information ecosystem.

Data Security and Privacy

As Passenger Information Systems become more data-driven, ensuring the security and privacy of passenger data is paramount. Collecting, storing, and transmitting sensitive information about travelers, such as location and travel patterns, must adhere to stringent security and privacy standards. Protecting this data from unauthorized access and cyber threats is a significant challenge for PIS providers and operators. Compliance with data protection laws and regulations is a key concern. Data breaches can not only lead to significant financial losses but also erode trust among passengers and undermine the credibility of transportation authorities. Addressing these challenges necessitates robust cybersecurity measures, data encryption, and clear policies for data collection and usage to safeguard passengers' privacy and information.

Financial Sustainability

Sustaining and expanding Passenger Information Systems over time presents a financial challenge, both for transportation operators and the government. Implementing PIS technologies requires substantial initial investments in hardware, software, and installation, and ongoing expenses for system maintenance and upgrades. For transportation operators, justifying these costs while ensuring affordable fares for passengers can be a delicate balancing act. Pricing structures and revenue models must be designed to cover expenses and provide a return on investment. Additionally, operators need to demonstrate the value of PIS through improved operational efficiency and increased ridership to secure long-term financial sustainability. For the government, funding the deployment of PIS systems across the country, especially in less populated or remote areas, can strain public budgets. Ensuring adequate financial resources for infrastructure development, technology acquisition, and system maintenance remains a significant challenge in the context of broader budgetary priorities.

User Adoption and Accessibility

The successful implementation of Passenger Information Systems relies on user adoption and accessibility. Ensuring that passengers, regardless of their age or technical proficiency, can easily access and benefit from PIS solutions can be a complex task. A challenge lies in making these systems user-friendly and inclusive for all.

Accessibility is a critical aspect, as the PIS should cater to passengers with diverse needs, including those with disabilities or language barriers. Providing information in multiple languages, implementing tactile or audio interfaces, and ensuring compliance with accessibility standards are all essential considerations. User adoption also depends on educating passengers about the availability and utility of PIS systems. Promoting awareness and guiding passengers on how to use these technologies can be a

significant challenge in achieving high adoption rates.

Key Market Trends

Digital Transformation and Mobile Integration

A prominent trend in the Saudi Arabia PIS market is the growing emphasis on digital transformation and mobile integration. With the proliferation of smartphones and increasing internet penetration, passengers are increasingly reliant on mobile devices for travel information. PIS providers are responding by developing mobile applications that offer real-time data on transportation schedules, routes, and service updates. These apps not only enhance the passenger experience but also allow for personalized travel planning, further encouraging the use of public transportation. Additionally, digital displays and signage are being integrated into transportation hubs and vehicles to provide passengers with up-to-the-minute information. The trend of embracing digital technologies and mobile integration not only meets the expectations of modern travelers but also contributes to more efficient and accessible public transportation systems.

Sustainability and Green Transportation

As sustainability becomes a global priority, the Saudi Arabia PIS market is witnessing a trend toward promoting green transportation. Passenger Information Systems are increasingly being used to encourage the use of eco-friendly transportation options, such as buses and trains. PIS solutions provide information about the environmental benefits of using public transportation, including reduced carbon emissions and lower energy consumption compared to private vehicles. Moreover, they assist passengers in identifying green routes and choosing eco-friendly travel options. In response to this trend, transportation authorities are working to align their PIS strategies with sustainability goals, contributing to a more eco-conscious approach to public transit in Saudi Arabia.

Data Analytics and Predictive Insights

Another notable trend in the Saudi Arabia PIS market is the growing reliance on data analytics and predictive insights. Transportation operators are harnessing the power of data to optimize routes and schedules, reduce congestion, and enhance operational efficiency. PIS systems gather vast amounts of data on passenger movements, vehicle performance, and traffic conditions. Analyzing this data enables operators to make informed decisions about service improvements and resource allocation. Predictive analytics also play a crucial role in anticipating and mitigating potential disruptions, allowing for a more reliable and seamless travel experience. As the demand for data-driven decision-making continues to rise, PIS providers are developing increasingly sophisticated analytics tools and insights to empower transportation authorities in their quest for efficient and responsive public transit services.

Multimodal Integration

Saudi Arabia is witnessing a trend toward integrating various modes of transportation under a single, seamless passenger experience. PIS systems are at the forefront of this trend, providing passengers with comprehensive information on multiple modes of transport, including buses, trains, trams, and even ridesharing services. Passengers can now plan their journeys using a combination of these modes, with real-time data on connections, transfers, and ticketing. This trend not only simplifies travel for passengers but also encourages the use of public transportation by making it a more convenient and viable alternative to private cars. The integration of different modes of transportation under a single PIS umbrella is expected to continue evolving and expanding to further enhance the overall passenger experience.

Public-Private Partnerships

An emerging trend in the Saudi Arabia PIS market is the increased collaboration between public and private entities in delivering passenger information solutions. With the government's commitment to improving transportation infrastructure, private technology companies are increasingly partnering with government agencies and transportation operators to deploy advanced PIS systems. These partnerships allow for expertise sharing, technology innovation, and cost-sharing, which benefits both parties. As a result, private companies are playing a more significant role in developing and operating PIS solutions, while public authorities maintain oversight and regulation. This trend is expected to foster innovation and accelerate the adoption of cutting-edge PIS technologies in Saudi Arabia's public transportation sector.

Segmental Insights

Component Insights

The hardware segment emerged as the dominant force in the Saudi Arabia Passenger Information System (PIS) market and is

expected to maintain its dominance throughout the forecast period. This dominance can be attributed to the substantial investments made in upgrading and modernizing the transportation infrastructure across the country, particularly as part of the Vision 2030 initiative. As Saudi Arabia continues to enhance its public transportation systems, there is a significant demand for advanced hardware components to support the deployment of PIS solutions. This includes digital displays and signage at transportation hubs, onboard communication systems, GPS devices for real-time tracking, and various sensors for data collection. The hardware components are the backbone of any PIS, ensuring that accurate and real-time information is delivered to passengers seamlessly. Moreover, with the increasing urbanization and population growth, the hardware segment is crucial for delivering a reliable and efficient passenger experience. These hardware components not only help passengers make informed decisions but also contribute to improved transportation system management and operations. The hardware segment's dominance is expected to persist as the government and transportation authorities remain committed to investing in the latest technologies and infrastructure. With the continuous expansion of public transportation networks and the need for more sophisticated and integrated PIS solutions, the hardware segment will remain the driving force behind the Saudi Arabian PIS market, ensuring the delivery of real-time information and enhancing the overall travel experience for passengers.

Regional Insights

The Riyadh region emerged as the dominant force in the Saudi Arabia Passenger Information System market, and it is expected to maintain its dominance during the forecast period. Riyadh, the capital city of Saudi Arabia, and its metropolitan area, experienced substantial investments in transportation infrastructure, making it a prime hub for PIS implementation. The Riyadh region has witnessed rapid urbanization, population growth, and increased demand for efficient public transportation systems. These factors have led to a strong focus on enhancing the passenger experience and optimizing transportation services. The Riyadh region's significance in the PIS market is further underscored by the government's commitment to the Vision 2030 initiative, which places significant emphasis on modernizing transportation infrastructure and enhancing urban mobility. As a result, the Riyadh region has been at the forefront of deploying advanced PIS solutions, including digital signage, mobile applications, and real-time data communication networks. These systems provide commuters with vital information on schedules, routes, and service updates, contributing to an efficient and convenient travel experience. Given the sustained investment in transportation infrastructure, ongoing urbanization, and the central role of Riyadh as a key economic and administrative hub, this region is well-positioned to continue its dominance in the Saudi Arabian PIS market, providing passengers with innovative and comprehensive solutions for years to come.

Key Market Players

- Siemens AG
- Huawei Technologies Co., Ltd.
- Advantech Co., Ltd.
- Indra Sistemas, S.A.
- Thales S.A
- Toshiba Corporation
- Mitsubishi Electric Corporation
- Teleste Corporation

Report Scope:

In this report, the Saudi Arabia Passenger Information System Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□ Saudi Arabia Passenger Information System Market, By Component:

- o Hardware
- o Software
- o Services

□ Saudi Arabia Passenger Information System Market, By Location:

- o On Board
- o In Station

□ Saudi Arabia Passenger Information System Market, By Transportation Mode:

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- o Railways
- o Roadways
- o Airways
- o Waterways
- o Others

□□Saudi Arabia Passenger Information System Market, By Functional Mode:

- o Multimedia Displays
- o Audio Systems
- o Computing Systems
- o Networking and Communication Devices
- o Video Surveillance
- o Content Management System
- o Others

□□Saudi Arabia Passenger Information System Market, By Region:

- o Riyadh
- o Makkah
- o Madinah
- o Jeddah
- o Tabuk
- o Eastern Province
- o Rest of Saudi Arabia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Passenger Information System Market.

Available Customizations:

Saudi Arabia Passenger Information System Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

□□Detailed analysis and profiling of additional market players (up to five).

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