

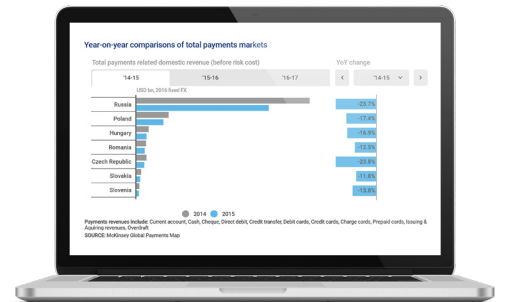
Payments Map Country Comparison



Why you need it

Banks and payments providers developing go-to-market strategies and conducting yearly planning need a reliable view of the market size and product structure of their current and future geographies. However, teams may be unable to find up-to-date market metrics from public reports, they lack detailed knowledge of the geographies' products, and they struggle to apply a standardized method for assessing banking segments and comparing payments markets around the globe.

Country Comparison leverages numerous data sources and expert input to map out absolute market sizes, relative product shares, infrastructure metrics, and penetrations by country. The dataset view includes historical and future payments market figures, as well as standardized KPIs for comparing domestic revenue opportunities and growth potential.

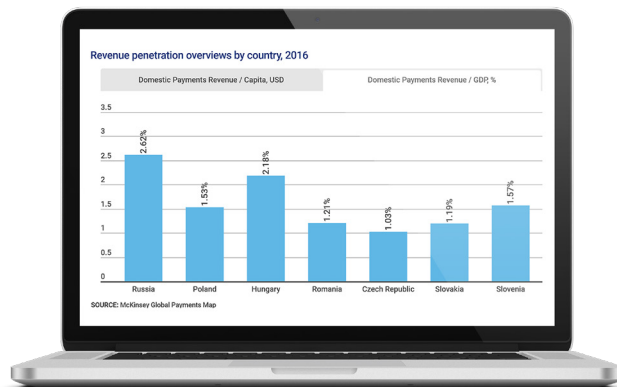


Key features

- Provides product breakdowns for **fees revenues** (e.g., credit & charge cards, direct debit, credit transfers, current account, overdraft lines) and **interest incomes** (e.g., current account, credit card, overdraft lines)
- Includes **infrastructure KPIs** (e.g., number of cards, accounts, ATMs, and terminals)
- Highlights **penetration metrics** (e.g., Revenue/GDP, any infrastructure numbers/capita)
- Models payments product every year using **all major income drivers** (e.g., transaction value, transaction volume, and fees for issuing, acquiring, and transactions)

Use cases

- Payments providers selecting the most promisingly growing markets
- Private equity firms judging current potential and future market revenue growth of a portfolio company
- Banks measuring and tracking their payments revenue market share across their geographies
- Investors identifying under-penetrated markets
- Strategy teams prioritizing new payments product introduction among a set of new markets



Payments Map Country Comparison by the numbers

45

countries

40+

product experts

15

years of data

200+

data sources

To learn more, contact us at paymentsmap@mckinsey.com