



THE PANORAMA OF LOYALTY IN BRAZIL

2023

ESSENTIAL DATA ON
A SIGNIFICANT MARKET



Executive Summary



Despite its current size and growth potential, it is still difficult to find figures on the loyalty and incentive market in Latin America. But, in Brazil, some stubborn players are working consistently to change that.

Tudo Sobre Incentivos (TSI / All About Incentives), an educational platform about loyalty created by the company Valuenet, is one of them. Last September, TSI published the third edition of its B2C survey: [***The Panorama of Loyalty in Brazil 2023***](#), the most important research on the Loyalty market in the country.

In 2023, the survey was carried out in partnership with the main association in the sector, ***ABEMF (Brazilian Association of Companies in the Loyalty Market)*** and launched during its *6th Brazilian Loyalty Forum* - the biggest Loyalty event in Brazil.

Recent data and essential figures in Brazil

- Number of Loyalty Programs registrations
- The Brazilian Loyalty Market
- ABEMF's companies revenues

Survey Data | The Panorama of Loyalty in Brazil 2023

- How many participate in loyalty programs?
- Is it profitable to invest in continuous and structured programs?
- Loyalty actions that most cause positive sensations
- Factors that most impact the purchasing decision
- Factors that make consumers abandon a favorite brand and try another
- Type of benefits that consumers would like their favorite brand to offer them
- What else could a loyalty program do for the consumer?
- Factors related to ESG

About Us

- Valuenet, Tudo Sobre Incentivos and ABEMF

To better understand this blooming Brazilian industry and its current size, here are some recent data and essential figures:



In 2023, Brazil reached **306 million registrations in loyalty programs** (with a population of 203 million people) (ABEMF)



In 2023, the **Brazilian Loyalty market is estimated at R\$20 billion** (~US\$5 billion) (ABEMF)



In 2022, companies affiliated to ABEMF alone had revenues of more than **R\$9.5 billion (~US\$2 billion)**

Survey Data | The Panorama of Loyalty in Brazil 2023

2,317 people were surveyed, in August 2023, and they represent a fair sample of gender, regions and social classes in Brazil. All questions referred to consumers' interaction with brands in the previous 12 months. The research has a margin of error of 2 pp.

Here are some key points:

1 **80.9% of the survey respondents participate in loyalty programs in Brazil**, and 53.6% of them are part of up to three programs.

2 Companies that invest in **continuous and structured programs have 6X more interactions (transactional and relational)** with their best customers.

3 Among the ten characteristics of loyalty actions that **most cause positive sensations**, the first three are:

Cashback	33%
Discount coupons	31.5%
Earning points	31.4%

4 Factors that most **impact the purchasing decision:**











Free shipping	51%
The product offered is of excellent quality	46.3%
The company offers the best prices	45.2%
The company offers benefits such as discounts, cashback, collectables, etc.	29%
The brand is trustworthy and transparent regarding its production and distribution process	20%
The brand's delivery time is faster than that of competitors	17%
Service is excellent throughout the purchase journey	16%
The company has a loyalty program	12%
The experience in the online shopping environment is excellent	11%
The company offers more sustainable products (better for the environment)	10.2%

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5 Factors that would make consumers **abandon a favorite brand and try another:**

Product quality drops	52.2%
The price of products rises	41.4%
The brand does not fulfil what it announces in its speech	32.6%
Not feeling well served at some point in my purchase journey	29.4%
The company stops offering free shipping / or delivery takes too long	28.6%
The brand does not offer / or stops offering advantages (such as cashback, discount, collectable items, gifts, etc.)	20.2%
If I am introduced to a new brand that has products similar to those I already consume, but that has a more sustainable production process (better for the environment and society)	13.1%
The brand stops being transparent concerning its production and distribution process	13%
The company stops representing the values I support	13%
The brand does not have a loyalty program / no longer has a loyalty program	12.8%
The company does not recognize my loyalty (does not thank me for repeat purchases or when I speak well of the brand on social media, etc.)	10.2%

6 Type of **benefits that consumers would like** their favorite brand to offer them:

	Miles/points for airline tickets	49%
	Cashback	41,1%
	Bounceback (discount on next purchase)	29,4%
	Discounts on bills (electricity, gas, credit card)	19,9%
	Daily rates in hotels	17,4%
	Redemption of products with high financial value (smart TV, smartphone, household appliances, etc.)	16,1%
	Redemption of products with low financial value (housewares, toys, etc.)	10,5%
	Experiences (tours or special services)	10,4%
	Tickets for cultural events (concerts, cinema)	9,7%
	Car rental rates	6,7%

7 What else could a **loyalty program do for the consumer:**

Teach me how to develop financial planning that allows me to fulfill my dreams (studies, travel, etc.)

43.5%

Speed up the resolution of problems with the brand (offer feedback, answer questions, product returns, etc.) and reward me (with points or benefits) for inconveniences

40.8%

Incentivize me to be more sustainable and contribute positively to society

22.9%

Help me develop healthy habits

21%

Promote communities related to the company's products and services (connect me with other people with the same tastes and goals)

19.6%

Teach me how to develop financial planning that allows me to fulfill my dreams (studies, travel, etc.)

43.5%

8 Factors **related to ESG:**

The brand is trustworthy and transparent regarding its production and distribution process	20%
The company offers more sustainable products (better for the environment)	10.2%
The brand does not fulfill what it announces in its speech	32.6%

Valuenet

Over more than 15 years, [Valuenet](#) has developed tools, technologies and methodologies that assist in all phases of the design and operation of loyalty and engagement strategies. It is a Salesforce partner and was a pioneer in the implementation and development of CRM automation technologies in Brazil.

Tudo Sobre Incentivos

A Valuenet initiative, [Tudo Sobre Incentivos](#) (TSI) is an education platform that aims to foster ideas and concepts about loyalty. It is a space for debate and sharing of themes and trends in the loyalty and incentive market in Brazil and abroad, through the production of articles, interviews, materials and research.



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