

Global Co-branded Credit Card Market Size study, by Vendor Type (Card Issuer, Card Network, Retailer), by Credit Card Type (Physical Credit Cards, Virtual Credit Cards), by End-User (Education, Gaming, Hospitality, Petroleum, Retail, Travel) and Regional Forecasts 2022-2032

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Abstracts

The Global Co-branded Credit Card Market is valued approximately at USD 13.41 billion in 2023 and is anticipated to grow with a healthy growth rate of more than 9.74% over the forecast period 2024-2032. Co-branded credit cards, encompassing both store and rewards cards backed by major networks or card issuers, offer consumers significant merchandise perks, discounts, points, or other rewards. These cards are widely accepted, and their usage provides substantial benefits to users. Various sectors, including airlines, hotels, eCommerce, and fuel companies, collaborate with banks to introduce these cards, facilitating ease of payment for customers. The rising adoption of credit cards among young and millennial generations, combined with their interest in significant discounts and potential cash-back, acts as the primary driving force for the market. Despite these benefits, the limitations related to the operations and high annual fees of co-branded credit cards hinder market growth. The industry is now focusing on launching enhanced co-branded credit cards and forming partnerships with retail and airline companies to expand market development.

Co-branded credit cards involve partnerships between different types of vendors. The card issuer, usually a financial institution such as a credit card company or bank, is responsible for issuing and managing these cards, handling application processes, credit underwriting, account management, and customer service. The card network facilitates the authorization, clearing, and settlement of transactions made with co-branded credit cards. Retailers, as co-branded partners, provide the brand affiliation

and customer base that the card issuer leverages, and these retailers can be major chains, department stores, or online marketplaces.

Virtual co-branded credit cards, existing in a digital format, provide convenience and security for online shopping and digital payments. These cards can be stored in mobile wallet applications and accessed through online banking platforms. On the other hand, physical co-branded credit cards are traditional plastic cards issued to cardholders, carrying the branding of the financial institution and the co-branded partner. These cards offer the familiar form factor of traditional credit cards, including the cardholder's name, card number, expiration date, and security features.

The adoption of co-branded credit cards is extensive across various industries, including travel, petroleum, gaming, hospitality, retail, and education. In the gaming industry, these cards offer rewards such as discounts on game purchases, exclusive in-game content, and access to gaming events. In the hospitality industry, they are associated with hotel chains, resorts, and travel booking platforms, offering loyalty points, room upgrades, complimentary night stays, and exclusive discounts. In the petroleum industry, these cards, issued in partnership with gas stations and oil companies, provide rewards and discounts on fuel purchases. Retail industry co-branded credit cards are associated with major retail chains, offering rewards, discounts, and exclusive access to sales events. In education, co-branded credit cards are often offered in partnership with universities or educational institutions.

In the Americas, particularly the United States, the production and use of co-branded credit cards are highly developed, driven by a culture of credit reliance and robust rewards programs. Financial institutions and brands collaborate to leverage extensive consumer data analytics to tailor offerings, making these cards popular across various sectors, including airlines, retail, and hospitality. The Asia-Pacific region exhibits varied adoption rates, with markets such as Australia and Japan witnessing significant uptake due to high consumer spending habits and an inclination for loyalty programs. Emerging markets within APAC are gradually embracing co-branded cards, facilitated by growing middle-class populations and digital banking advancements. In Europe, stringent regulatory frameworks for data protection and financial transactions, including the General Data Protection Regulation (GDPR), influence the structure and marketing of co-branded cards. Adoption in the Middle East is on the rise, driven by luxury travel and retail sectors, while Africa's focus remains on financial inclusion, with co-branded credit cards playing a minor role.

Major market player included in this report are:

- American Express Company
- Axis Bank Limited
- Bank of America Corporation
- Barclays PLC

- Capital One Financial Corporation
- Citigroup Inc.
- HDFC Bank Limited
- ICICI Bank Limited
- JPMorgan Chase & Co.
- Mastercard International Incorporated
- Scotiabank
- Shinhan Bank Co., Ltd.
- Synchrony Bank
- The Goldman Sachs Group, Inc.
- Visa Inc.

The detailed segments and sub-segment of the market are explained below:

By Vendor Type

- Card Issuer
- Card Network
- Retailer

By Credit Card Type

- Physical Credit Cards
- Virtual Credit Cards

By End-User

- Education
- Gaming
- Hospitality
- Petroleum
- Retail
- Travel

By Region: North America

- U.S.
- Canada

Europe

- UK
- Germany
- France
- Spain
- Italy
- ROE

Asia Pacific

- China
- India

- Japan
- Australia
- South Korea
- RoAPAC

Latin America

- Brazil
- Mexico

Middle East & Africa

- Saudi Arabia
- South Africa
- RoMEA

Years considered for the study are as follows: Historical year – 2022 Base year – 2023
Forecast period – 2024 to 2032

Key Takeaways:

- Market Estimates & Forecast for 10 years from 2022 to 2032.
- Annualized revenues and regional level analysis for each market segment.
- Detailed analysis of geographical landscape with Country level analysis of major regions.
- Competitive landscape with information on major players in the market.
- Analysis of key business strategies and recommendations on future market approach.
- Analysis of competitive structure of the market.
- Demand side and supply side analysis of the market.

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