ORDER TO EAT TRACKER®

PAYTRONIX | PYMNTS.com

FEBRUARY 2021

TABLE OF CONTENTS

Acknowledgment

The Order To Eat Tracker® is done in collaboration with Paytronix, and PYMNTS is grateful for the company's support and insight. PYMNTS.com retains full editorial control over the following findings, methodology and data analysis.

WHAT'S INSIDE

The food service sector has a long way to go before most diners regain their appetites for dining out, according to recent trends. The National Restaurant Association found that roughly one in six United States restaurants — about 100,000 in total — closed permanently or temporarily last year, with the pandemic putting 3 million employees out of work as government-mandated restrictions and consumers' changing habits rapidly upended the industry.

The pandemic has had a dramatic impact on quick-service restaurants (QSRs), with recent research finding that fast food eateries' revenues fell more than 12 percent in 2020 to $239 billion in the U.S. Many QSRs are turning to digital tools to turn this trend around, however, rolling out a combination of innovative ordering options, delivery and pickup solutions and personalized loyalty and rewards programs to keep customers engaged and boost sales.

The stakes for offering such services have never been higher, with PYMNTS' Restaurant Readiness Index revealing that managers who underestimate customers' demands for digital menus, ordering and payments — as well as their fondness for cutting-edge loyalty programs — will pay the price. It found that offering ordering and payment choices differentiates top-performing eateries from the rest, with 89 percent of top restaurants allowing online food orders and 91 percent providing curbside options, for example. Just 9 percent of bottom performers offer online ordering, however, and only 24 percent offer curbside pickup.

These findings show that restaurants must stay nimble to survive — or even expand their operations, as some hope — during the pandemic. Growing evidence suggests that leveraging digital tools, contactless payment options and loyalty programs together can help them stay in the game.

AROUND THE ORDER TO EAT WORLD

A new report shows that many businesses in the hospitality sector — including restaurants and bars — remain optimistic as doors reopen. The survey revealed that small business owners and executives were generally confident in their businesses' future despite pandemic-related challenges. Only 48 percent of respondents said they were worried about job security due to the health crisis, down from 60 percent who said the same in April. The survey found that 55 percent of business owners were still concerned about whether they could maintain profitability amid ongoing dining capacity limits and social distancing rules, however.

Some QSRs, including a few well-known brands, are heeding customers' calls for digital and contactless experiences by developing new brick-and-mortar business models. Fast food behemoth Burger King recently unveiled a restaurant concept that would provide covered parking canopies to allow customers to order meals via app and have them delivered to their vehicles. Mexican-inspired QSR Taco Bell has meanwhile announced the upcoming launch of its Go Mobile concept stores, locations that will be roughly half the size of the chain's traditional brick-and-mortar locations and offer multiple drive-thru lanes and curbside pickup solutions.

Consumers' digital shifts are even prompting QSRs to reexamine digital tools that they may have previously overlooked. Recent data suggests that QR codes, unique designs that consumers can scan with their mobile devices, are finding favor with U.S. restaurants for payment and other practical uses. These solutions were originally rolled out in the 1990s and reached the retail world in 2000, but they failed to gain much traction in the U.S. initially. The pandemic is changing this, however, as QR codes allow customers to contactlessly open digital menus and pay using mobile wallets while minimizing their interactions with restaurant workers.

For more on these stories and other news items from the order to eat space, read the Tracker's News and Trends section (p. 11).

HOW MIXT IS NAVIGATING PANDEMIC SETBACKS WITH CONTACTLESS FEATURES, REWARDS PROGRAM

QSR chains across the country are experiencing serious pandemic-driven setbacks and needing to close locations. San Francisco-based fast casual salad chain MIXT is one such eatery that witnessed sales drop by 80 percent in five days, causing nine of its locations in urban areas to close, according to co-founder and CEO Leslie Silverglide. The company leveraged third-party delivery partners, curbside pickup and a recently upgraded loyalty program to offer targeted rewards and boost its customer engagement, however. In this month's Feature Story, PYMNTS spoke with Silverglide on how MIXT is navigating the restaurant industry's woes and leaning on valuable rewards program data to stay agile.

DEEP DIVE: HOW THE PANDEMIC IS DRIVING OPPORTUNITIES FOR QSRs IN ORDERING, PAYMENTS AND REWARDS

The pandemic is fueling unprecedented consumer demand for contactless ordering and payment options as well as a revival of interest in tailored rewards programs at thousands of QSRs across the country. These features are significant drivers of where consumers decide to spend money, with 39 percent of surveyed U.S. consumers saying that eateries' loyalty and rewards programs would encourage them to spend more at these establishments. This month's Deep Dive (p. 15) explores the pandemic's seismic effect on QSR ordering, payments preferences and rewards programs and why these shifts are set to last well into the post-pandemic future.

EXECUTIVE INSIGHT

The pandemic has fueled a greater demand for loyalty and rewards programs. What factors must QSRs keep in mind when developing or upgrading loyalty programs to meet customers' expectations?

"Guests expect a personalized experience no matter how they interact with a brand. This means having a program that is sophisticated enough to not only collect guest data but [also have] the right tools and intelligence to turn that data into individualized action. Here at Paytronix, we configure artificial intelligence algorithms to understand the patterns that appear in check-level data and then use that information to provide personalized messages. For example, a person with vegetarian purchasing habits shouldn't be receiving deals for a meat lover's pizza. Instead, you want to identify the trigger that is going to bring that person in at the time that's right.

But getting them the right message is only half of the battle; it also needs to be at the right time. In the past, a brand may [have opted to] run win-back campaigns at various time intervals and [targeted] anyone who hadn't made a purchase over a given time period. But today, a good win-back campaign should understand a guest's personal cadence so [it] can reach them right when their patterns change.

Finally, a loyalty program needs to take into account the complete guest experience, no matter how they use the brand. They may order online, use a mobile app or come in through a third-party aggregator, but for the guest, all those experiences must be consistent. A good loyalty program will keep that guest engaged across all channels."

LEE BARNES
Head of data and insights at Paytronix

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FIVE FAST FACTS

73%

Share of QSR customers who order food using online and offline channels

38%

Portion of consumers who say they would spend more if restaurants allowed them to pay online

39%

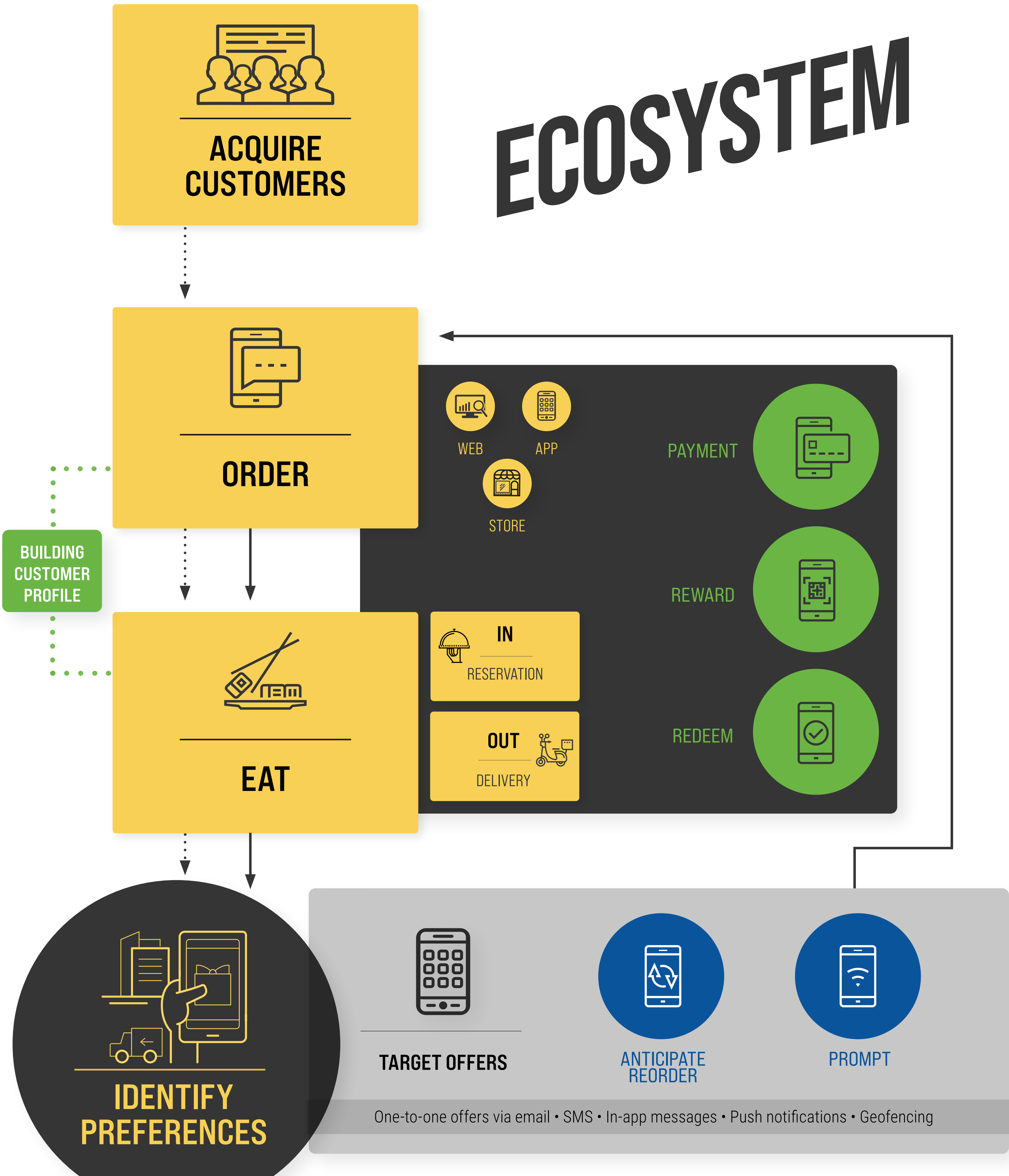
Share of consumers who say that loyalty and rewards programs would encourage them to make more restaurant purchases

70%

Share of QSR loyalty program users who say they prefer to access rewards through restaurants' mobile apps

7%

Portion of QSR customers who exclusively use digital methods to order food


ECOSYSTEM
ACQUIRE CUSTOMERS
ORDER
WEB
APP
STORE
PAYMENT
REWARD
REDEEM
BUILDING CUSTOMER PROFILE
EAT
IN
RESERVATION
OUT
DELIVERY
IDENTIFY PREFERENCES
TARGET OFFERS
ANTICIPATE REORDER
PROMPT
One-to-one offers via email • SMS • In-app messages • Push notifications • Geofencing

FEATURE STORY

Why MIXT Is Leaning On Loyalty To Navigate Pandemic-Induced Challenges

The pandemic has wreaked havoc on restaurants since its onset last March, permanently closing some eateries altogether while halting expansions of even the most thriving and digitally savvy QSRs. San Francisco-based fast casual salad chain MIXT is one such QSR whose expansion plans were tabled by mandated closures of indoor dining rooms when the health crisis struck. The company, which offers locally sourced mixed green salads, grain bowls and sandwiches, had grown from a single diner in the Bay Area in 2005 to as many as 20 locations in California, Arizona and Texas. The pandemic not only put the brakes on the chain's expansion but also shuttered nearly half of MIXT's locations, according to co-founder and CEO Leslie Silverglide.

"Coming into March last year, we had a very thriving business that was growing very quickly," Silverglide told PYMNTS in a recent interview. "We had digital ordering, payment and delivery [options], but the majority [of our business] was walk-in. Sales dropped by 80 percent in five days. It's certainly been the hardest and most challenging time of the business, trying to figure out and navigate it."

The pandemic's early strictures prompted Silverglide to pare down her plans to three key objectives: keeping as many workers employed as possible, continuing to serve guests food they love and — above all — making sure MIXT survived for the long haul. Store locations in areas dense with offices such as the financial districts of Los Angeles, San Francisco and Dallas suffered the most from lack of sales, forcing nine of her locations to close — and remain shut.

"The majority of our locations are in the Bay Area, and it's certainly the most locked-down area in the country," Silverglide said.

MEETING NEW CONTACTLESS NEEDS

The QSR chain lacked some features for reaching more customers at speed during the pandemic, such as drive-thru lanes, but fortunately it was able to compensate: MIXT was among the first restaurants to contract with San Francisco-based online food delivery service Caviar, which was acquired by DoorDash. Silverglide explained that this arrangement with a third-party delivery platform was crucial in not missing a beat when the pandemic caused restaurants to adjust their strategies overnight.

"It was very beneficial for us because we weren't scrambling to get anything in place," she said.

MIXT accepts orders and payment through its mobile app and website, in addition to having chip readers for customers who prefer to purchase in-store with plastic cards. The chain also offers curbside pickup options for its patrons, who can text the restaurant when they arrive so staff will deliver the food to their vehicles.

UPGRADING REWARDS SOFTWARE FOR IMPROVED LOYALTY OFFERINGS

MIXT threw itself into its pivot further by launching a new, upgraded loyalty program in December to help drive engagement and build long-term customer relationships. The new program provides MIXT with valuable customer-preference data that enables the company to target patrons with specific deals based on previous orders. The program would not offer the reward of a free salad with a steak, say, to a customer who orders only vegetarian dishes, for example.

"[The new loyalty program] gives us a tremendous amount of flexibility in [offering] rewards and points," Silverglide said. "Now customers can choose how they want to use their points so they can [opt] for free meals, drinks [and] extra things."

The program is too new to determine whether users are ordering more because of their membership, she said, but recent data points to the strong potential of such programs to help struggling restaurants weather the pandemic's ravages. PYMNTS' Restaurant Readiness Index, a collaboration with Paytronix, found that 39 percent of all restaurant customers would likely spend more if their usual eateries offered loyalty and rewards programs — yet only 62 percent of restaurants offer them.

MIXT is one of many QSR chains across the U.S. working to survive despite the pandemic's setbacks. These businesses stand a fighting chance if they continue to offer a greater variety of contactless options and focus on revamping and leveraging underutilized tools — such as rewards programs.

NEWS & TRENDS

The slow road to recovery

SHIFTS IN CONSUMERS' DINING HABITS STILL REVERBERATING ACROSS RESTAURANT INDUSTRY

The pandemic prompted significant changes in numerous consumer behaviors, but few shifted as dramatically as customers' eating habits. Analysis from restaurant review company Zagat indicated that Americans dined out an average of six times per week in 2018, but on-premises dining was put on hold during the start of the crisis, and home-prepared meals became most consumers' go-to options. This resulted in a plunge in restaurant-based food consumption despite the availability of drive-thru, takeout and curbside pickup offerings.

Stay-at-home orders have since been relaxed, and many restaurants have been allowed to reopen with strict rules in place, but much of the damage may be long-lasting. Research over the past few years has revealed that consumers tend to eat roughly 80 percent of their meals at home and 20 percent at restaurants. Consumers ate approximately 87 percent of their meals at home last year, however, indicating that restaurant-based options accounted for just 13 percent of their meals. The flexible ordering, pickup and delivery options for which QSRs are known could play a crucial role in reversing these trends by satisfying governments' safety mandates and addressing consumers' health concerns.

REPORT OUTLINES MORE ROBUST RECOVERY FOR QSRs THAN FOR FULL-SERVICE RESTAURANTS

New data also indicates that QSRs are in a better position than their full-service peers to bounce back from the health crisis. One recent report found that QSRs experienced an 8 percent decline in year-over-year transactions in December 2020, much lower than the 35 percent drop measured in April, for example. It noted that the availability of takeout, drive-thru and delivery options helped shield these restaurants from the brunt of the pandemic's impact.

Major restaurant chains were not far behind, with a 10 percent year-over-year dip in transactions in December versus a 37 percent fall in April 2020. The full-service sector, on the other hand, saw transactions drop 30 percent year over year in December and 70 percent in April. Restaurants that typically receive much of their business through dine-in service are still struggling with capacity limits and social distancing requirements, according to these results.

PANEL PREDICTS RESTAURANTS WILL FACE ROCKY ROAD TO RECOVERY IN 2021

The new year has brought hope for QSRs and other eateries that have relied on the strength of their takeout and delivery offerings to weather pandemic-driven sales slumps. Panelists at a recent virtual conference hosted by communications and advisory firm IRC explained that the downward trends experienced in 2020 will be challenging to reverse in the year ahead, however.

Peter Saleh, director of financial services firm BTIG, said that labor is scarce because restaurants must compete to attract workers back to the segment despite the availability of federal stimulus package money and unemployment benefits. National Restaurant Association president Hudson Riehle said that a surge of dining room traffic led to a recovery peak in November, but the industry's gains have since softened. He also explained that in 2020 — before the pandemic hit — the association predicted that sales would reach almost $900 billion, but it instead expects the industry's sales to drop by $240 billion this year, a 27 percent decline. These insights reveal that there will still be challenges ahead for the sector as it works to emerge from the crisis and invest in new technologies and ordering solutions to cope with the new digital normal.

The ongoing digital push

MORE THAN 40 PERCENT OF RESTAURANTS BELIEVE DIGITAL TOOLS WILL ALLOW THEM TO EXPAND

The global health crisis has prompted restaurants to rely more heavily on digital solutions — or implement them for the first time — to stay in business, and many see these innovations as key to their recovery efforts. One recent survey polled small business owners and executives, including those in the food and beverage sector, to gauge their confidence regarding their businesses' financial futures. Forty-eight percent of respondents said they were worried about job security during the pandemic, down from 60 percent in April. Fifty-five percent were still concerned about whether they could maintain profitability when faced with continued dining capacity limits and social distancing rules, however.

The survey also found that nearly 50 percent of respondents adopted digital tools to grow their revenues while keeping customers and staff safe and that more than 40 percent of restaurant executives believe digital technologies will help their eateries expand. The study also reported that 48 percent of food and beverage SMBs are offering home delivery, and 30 percent have added online operations. Twenty-eight percent offer changing menus to meet customers' shifting demands, and 22 percent said they are adding new systems to streamline remote ordering.

MORE QSRs TURNING TO QR CODES FOR CONTACTLESS PAYMENT AND ORDERING SOLUTIONS

Restaurants implementing digital technologies to respond to customers' new touchless ordering habits are also turning to existing tools they may have overlooked in the past. New research reveals that more restaurants are turning to QR codes to offer mobile-enabled contactless ordering and payments during the health crisis.

QR codes were developed in the early 1990s and began making their way into the retail sector by 2000, but the technology was slow to catch on with American consumers. Recent QR code-scanning technology developments from Apple and Google, paired with the pandemic-driven shift toward contactless solutions, are helping QR codes gain mainstream appeal for restaurants and other retailers. Customers can use their mobile devices to scan the codes, which enable them to perform functions such as opening digital restaurant menus or linking to digital wallets to pay bills. An estimated 11 million U.S. households will scan at least one QR code this year, meaning the technology could hold promise for QSRs looking to offer seamless and cost-effective contactless solutions during the pandemic.

Restaurant developments, trends for the year ahead

QSR GIFT CARD SALES FARE BETTER THAN THOSE FOR FULL-SERVICE RESTAURANTS IN 2020

Recent research from restaurant loyalty platform provider Paytronix shows that restaurant gift card sales in 2020 accounted for the same share of annual sales as they had in previous years, despite overall gift card sales falling 32 percent year over year. It found that holiday sales represented 46 percent of restaurant gift card spend and 49 percent of total gift card sales last year. The average dollar amount purchased for each card also stayed relatively even despite the decline in overall sales, with fine dining establishments experiencing a nearly 8 percent rise in average spend per gift card during the year.

Full-service restaurants faced the biggest losses of the year, with their market share dropping more than 15 percent to just 26 percent of restaurant gift card sales in 2020. QSRs meanwhile accounted for about 67 percent of restaurant gift card sales last year, revealing that these restaurants — and, to a lesser extent, fine dining establishments — were the industry's big winners last year.

QSRs ARE ROLLING OUT NOVEL RESTAURANT CONCEPTS TO CATER TO CONSUMERS' NEW TASTES

Consumers' habits have changed during the pandemic, and many are now turning to drive-thru options, delivery and online solutions to order their meals. Recent data shows that 29 percent of consumers place online orders at least a few times a month and 25 percent order food digitally several times a week. Several QSR heavyweights are responding to these trends by launching restaurant concepts to meet customers' new digitally oriented ordering needs.

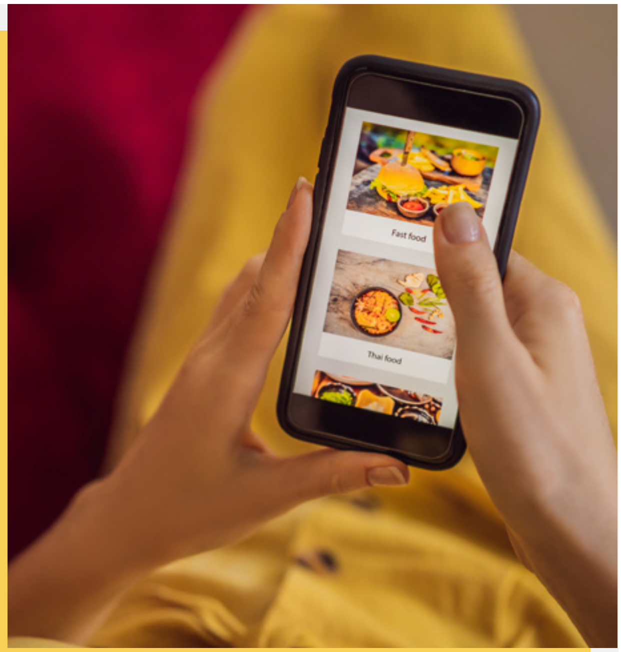
Burger King recently introduced a restaurant model that is designed primarily to handle orders and deliveries but still features a small dining room. These locations will feature drive-in areas covered by solar-powered canopies that will allow guests to place their orders using Burger King's app and have food delivered to their vehicles. They will also provide curbside delivery parking spots, pickup lockers for mobile and delivery orders, multiple drive-thru lanes and walk-up windows. Mexican-inspired QSR giant Taco Bell also recently unveiled its Go Mobile concept stores, which will be half the size of the chain's traditional restaurants and offer two drive-thru lanes and curbside pickup options.

RESTAURANTS IN HAWAII STRUGGLE WITH PANDEMIC-RELATED TOURISM LOSSES, RESTRICTIONS

Two new studies have revealed that pandemic-related restrictions on travel and dining have been especially detrimental to the restaurant industry in Hawaii. One survey revealed that more than half of Hawaii's restaurants could close by April, while a separate report outlined the high stakes of getting tourists to resume travel. The Hawaii Restaurant Association has said that at least 15 percent of the state's 3,600 restaurants have shuttered since the health crisis began.

Bryan Andaya, president and chief operating officer of Honolulu-based themed QSR chain L&L Franchises, recently stated that state-imposed restrictions are making it difficult for restaurants to plan their operations, as they never know when the rules will change or when locations will be told to shut down. He explained that almost 70 of the chain's franchises in Hawaii are falling behind on rent and that landlords will consider only deferring payment, which winds up putting them into debt. Such issues illustrate the severe consequences that the health crisis has had on the state's restaurant industry.

DEEP DIVE



How The Pandemic Is Driving Opportunities In QSR Ordering, Payments And Rewards Programs

The pandemic, for all its devastation of the restaurant industry this past year, has not ruled out opportunities for business growth in at least a few areas: It has fueled unprecedented demand for contactless ordering, touchless payment technology and personalized rewards programs. A recent survey of 2,081 U.S. consumers has shown that more than 74 percent used their mobile devices to order and pay for food and other goods at least once a week since the pandemic began, and nearly 48 percent said they currently use them for at least several purchases a week.

Consumers are turning to mobile ordering and payment at this time for numerous reasons, with 44 percent citing convenience as the most important factor, followed by ease of use (19 percent) and the ability to stay out of stores and restaurants (18 percent) during the pandemic. They think restaurants are doing a good job of meeting their needs, too, with 75 percent saying eateries are doing enough to accommodate contactless payments and only 13 percent stating the contrary. Forty-five percent see mobile ordering and payments as a chance to avoid interacting with staff in person, and 40 percent say they would continue ordering through mobile for this same reason even once the pandemic has subsided.

This month's Deep Dive explores the different types of contactless ordering and payment options that consumers want to see during the pandemic and how QSRs can fulfill this demand. It also explains how offering rewards programs can help QSRs drive consumer loyalty to their brands both now and long after the pandemic has passed.

THE SAFE ORDERING STANDARD

Consumer expectations for contactless ordering and payment options are rising, even among those who may be struggling to take the full digital leap from pre-pandemic ordering to newer mobile options. Installing self-service kiosks, for example, is proving beneficial to establishments looking to meet the contactless needs of consumers willing to venture out to QSRs and fast food locations. Forty-four percent of surveyed consumers said they would want to use self-service kiosks at their favorite restaurants if the devices became available, and 71 percent would prefer kiosks over placing orders directly with someone if doing so meant avoiding interaction with waitstaff.

Other contactless options consumers said they would like to see included tap-to-pay at checkout (43 percent); the ability to order on their mobile devices from their cars in parking lots (40 percent); curbside pickup (38 percent); and ordering and paying with servers using handheld devices (34 percent).

The trend toward contactless ordering and payment is also showing staying power, even for those resuming some semblance of normalcy by returning to an office. One survey of more than 1,600 American employees found that 80 percent are worried about how they will order and pay for on-site food at workplaces, and 90 percent would prefer to avoid interaction by ordering through a mobile app or online. Nearly 40 percent said they would avoid corporate dining altogether if contactless options were not available.

THE OPPORTUNITY OF REWARDS PROGRAMS

Another way QSRs working to weather the pandemic are finding effective for engaging with customers and encouraging more spend is through an old standby made new: rewards programs. Consumers at this financially challenging time are looking to save money, and granting them access to personalized discounts and perks now could help seal the deal for long-term loyalty as well.

TABLE 1:

How different personas would like to interact with restaurants' rewards programs
Share of table-service restaurant and QSR customers who are interested in interacting with rewards programs in select ways

	PERSONA		
	Online-offline diners	On-site diners	Digital diners
RESTAURANT			
• Restaurant's app	**59.0%**	29.6%	**62.4%**
• Provide phone number	42.6%	**47.3%**	42.6%
• Text message	37.8%	27.9%	35.2%
• Physical loyalty card	29.5%	38.5%	35.2%
• Digital wallet	24.4%	4.5%	33.2%
• Reward punch card	20.2%	29.2%	22.1%
• Third-party app	13.4%	5.3%	12.2%
• Other	2.6%	0.8%	2.6%
QSR			
• QSR's app	**70.1%**	30.0%	**87.8%**
• Provide phone number	38.2%	**56.4%**	40.2%
• Text message	32.5%	15.6%	24.0%
• Physical loyalty card	32.0%	36.4%	28.7%
• Digital wallet	28.3%	4.9%	16.9%
• Reward punch card	19.5%	17.1%	13.0%
• Third-party app	18.2%	2.1%	18.4%
• Other	0.5%	0.0%	5.7%

Source: PYMNTS.com

PYMNTS' recent Delivering On Restaurant Rewards Report, in collaboration with Paytronix, revealed that 39 percent of more than 2,000 U.S. consumers surveyed said loyalty and rewards programs would encourage them to spend more at eateries where they are offered. These programs were also the most frequently cited way that consumers would be most encouraged to spend. The research further confirmed that offering certain contactless features is key to meeting consumers' demands, including order pickup via drive-thru, mobile app ordering and QR code payments.

How consumers prefer to receive these rewards also reflects the shift to ordering online, with large majorities of both exclusively digital diners and those who order both online and offline saying they would prefer to access rewards through mobile apps.

LOOKING AHEAD

The report showed that although concerns about the pandemic are easing slowly, consumers are not likely to abandon online ordering anytime soon. Eighty-seven percent of those who shifted to mainly ordering food online since March, in fact, plan to continue to order in this fashion "somewhat" as often as they currently do.

The pandemic has driven up consumers' demand for contactless ordering and payment as well as the importance of rewards in determining where they choose to spend their hard-earned funds. These trends offer not just challenges but opportunities that will long outlive the pandemic, however, and thus should be crucial components of restaurants' engagement strategies.

ABOUT

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PAYTRONIX

Paytronix provides software-as-a-service (SaaS) customer experience management (CXM) services for restaurants. Its portfolio includes loyalty, gift and email solutions for fast-casual, fast food and quick service restaurants. Once implemented, these can be used to help establishments elevate their brand profiles. Its offerings can also be used to generate data insights to help restaurants pinpoint opportunities to improve their operations and customer engagements. The company's platform can integrate with many widely used restaurant POS systems. For more information, visit https://www.paytronix.com.

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