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The 2021 Subscription Commerce Conversion Index, a PYMNTS and sticky.io collaboration, examines how the pandemic is reshaping consumers' subscription preferences and expectations. We surveyed a census-balanced panel of 2,022 U.S. consumers to find out the features subscription providers must support to convert subscription-curious consumers into long-term subscribers.

Subscription

COMMERCE CONVERSION INDEX



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Introduction

Direct-to-consumer (D2C) seafood seller Wild Alaskan Company was caught off guard by the sudden surge in consumers shopping for grocery products digitally at the pandemic's onset. The seafood products that consumers once shopped for in physical stores were now being purchased online, especially via D2C subscriptions. The family-run business, which offers monthly seafood subscription to consumers across the United States, was taking on so many new customers at one point that its subscriber base grew fourfold every single day for an entire month. Its modest 18-employee team could hardly keep up.

Wild Alaskan Company now has more than fifty employees to support its growing subscriber base of 150,000 U.S. customers, the majority of whom have signed up during the past 10 months.¹

Few businesses have experienced the stratospheric growth of Wild Alaskan Company, but the seafood seller is not the only D2C subscription provider that has seen subscription rates soar amid the crisis. Consumer interest in subscription services has significantly increased over the past year, with many flocking to D2C providers to obtain unique products and services that they cannot obtain anywhere else. PYMNTS'

¹ White, C. Pandemic buying shifts prove boon for direct-to-consumer online seafood subscription services. Seafood Source. 2021. <https://www.seafoodsource.com/news/supply-trade/pandemic-buying-shifts-prove-a-boon-for-direct-to-consumer-online-seafood-subscription-services>. Accessed March 2021.

research shows that 34 percent of all subscribers (14 million U.S. consumers) have signed up for at least one new plan since the pandemic began, on average. Sixty-two percent (8.4 million) of these consumers are subscribing for products and services directly from manufacturers, and the strong majority of these subscribers say they use such subscriptions to try interesting new products, get higher quality items or have fun.

Consumers' newfound interest in D2C subscriptions is only the first of many trends that have emerged in the mid-pandemic subscription market, however. Subscribers' relationships with their providers are changing fast, with more consumers than ever using subscriptions not only to explore interesting new products and services but also to make shopping faster and more convenient. How have providers changed their approaches to meet the demands of this new "subscription-curious" consumer, and what subscription features are they using to deliver the subscription commerce experiences that subscribers have come to expect?

PYMNTS has been studying the subscription commerce industry since 2017. We have gone back into the field each year to research how consumers' subscription commerce habits continue to evolve and how providers are changing their offerings to keep up with these shifting demands. Our analysis measures subscription services' performance on a scale of 0 to 100, with zero indicating a sign-up process so friction-laden that consumers cannot finish signing up and 100 indicating a perfectly seamless sign-up process.

Our latest survey draws from a census-balanced survey of 2,022 U.S. consumers about their subscription commerce sign-up experiences. We also studied the online subscription sign-up processes offered by 210 subscription providers to analyze the pandemic's impact on the subscription commerce ecosystem. The 2021 edition of the Subscription Commerce Conversion Index, a PYMNTS and sticky.io collaboration, details the findings of our extensive research.

This is what we learned.

Consumers stuck at home are going on subscription sign-up sprees to explore new subscription possibilities. More than one-third have subscribed to at least one new service over the past year.

The pandemic has triggered a boom in subscription commerce activity. Consumers are using their time at home to browse and shop online for subscriptions in the way they once might have shopped at brick-and-mortar stores. An average of 34 percent of these "subscription-curious" consumers have subscribed to at least one new service since the pandemic began. More consumers

now hold at least one subscription than before the pandemic began. Subscription rates are up 12 percent from February 2020 and up 5 percent from just before the pandemic's start, and 81 percent of all U.S. adults now use at least one subscription service.

Consumers tend to see subscription products as either “must haves” or “nice to haves.” They subscribe directly to manufacturers for their “nice to haves.”

Consumers tend to subscribe to two distinct types of products and services: “must haves” and “nice to haves.” “Must haves” are often essential items, such as health and wellness products, pet supplies and household goods like cleaning supplies and paper towels, while “nice to haves” typically include beauty products and alcohol, among other things.

Consumers enjoy using subscriptions to purchase must-haves because it allows them to do so on “autopilot,” entrusting their subscription providers to send products of their liking on a regular basis. This provides an easier and more convenient alternative to making grocery lists and purchasing them

in stores. Eighty percent of consumers with subscriptions to health and wellness products say they signed up because doing so made their shopping experiences more convenient, for example, because it saved them time or because it meant they did not have to remember to buy such products in the store. These reasons are also cited by 84 percent of consumers with pet product subscriptions and 82 percent of those with subscriptions for household items.

Consumers with “nice-to-have” retail subscriptions also appreciate the convenience such services offer, but they are also more likely than average to subscribe directly from manufacturers because they believe

their products are more unique, higher quality or simply more fun. Fifty-seven percent of all U.S. subscribers (23 million people) have at least one subscription that enables them to receive products directly from their manufacturers. Eighty percent of these 23

million consumers say they do so because D2C subscriptions provide them with more variety, higher quality items or enjoyment and fun, or because they cannot purchase the products any other way.

Enabling subscription-curious consumers to subscribe quickly is no longer a differentiator but a necessity. It takes consumers nearly the same time to subscribe on top-performing and bottom-performing subscription sites.

Consumers want a quick, seamless onboarding experience, and a lack of ease can drive them to abandon their subscription sign-up processes. Providers understand this and are thus streamlining onboarding. The result is that it now takes consumers roughly the same amount of time to sign up for subscriptions on top-performing subscription sites as it does on sites of providers with the lowest Index scores.

It takes consumers an average of 2 minutes and 37 seconds to sign up for subscriptions on the 30 top-performing merchant sites. This is about the same amount of time it takes for consumers to sign up for new subscriptions on middle-performing sites (2 minutes and 34 seconds) and on bottom-performing sites (2 minutes and 33 seconds). This shows that offering a faster subscription time is no longer a key differentiator that can help merchants stand out — it has become a necessity.

Consumers are giving many of their new subscriptions test runs, quickly unsubscribing from services that do not meet their expectations.

Many consumers sign up for new subscription services just long enough to test them out, intending to cancel if those new services do not meet their expectations. Only 52 percent of consumers who have signed up for new consumer retail subscriptions during lockdown have kept their subscriptions, in fact. This shows just how pervasive the “subscription test” culture has become and why getting consumers to subscribe is only the first step to forging a strong relationship.

Providers appear to understand that subscription test runs have become commonplace and many are responding to consumer demand by providing a greater variety of subscription features that customers can use to customize their subscription experiences.

Pause features have become especially common in the past year to avert subscription cancellations after the test run is over.

Sixty percent of providers offer pause features in 2021 — 2 percent more than the share that did in 2020 and 11 percent more than did so in 2019.² This exemplifies one of many ways providers are adjusting their offerings to suit the demands of the new subscription commerce ecosystem.



² Providing an accurate year-over-year comparison of which subscription features are growing more or less common among subscription service providers required this part of our analysis to focus used on a subsample of providers whose online sign-up processes we have been researching each year since 2017. All other providers were excluded.

Subscription service providers are struggling to move the needle on user experience despite these improvements.

Enabling faster sign-up times and providing more customizable subscription plans with more plan options and pause features can each help improve the overall user experience. The trouble is that while many providers have added these features in the past year, many have also dropped features — especially those that tend to inspire consumers' trust, such as refund policies and password security requirements. Twenty-seven percent fewer subscribers have security requirements to

enter passwords than last year, for example, which tends to decrease consumers' confidence in providers' data security. Five percent fewer providers offer guarantee or refund policies than did so one year ago, removing the safety net that once encouraged consumers to subscribe to items they might be unsure they would like. The result is that providers' overall Index scores have remained largely stagnant from last year, slightly decreasing from 53 in 2020 to 52 in 2021.



Half of all promotional offers that are sent to subscribers convert to sales, but sending too many can chase subscribers away. Nearly one-quarter of subscription services sign customers up for promotional emails automatically.

Promotional emails and messages can be powerful sales-driving tools for subscription providers. The average subscriber receives 38 promotional offers per year and purchases the products featured 48 percent of the time. Thirty-one million U.S. consumers receive promotional material from their subscription service providers, fielding a collective 1.2 billion promotional offers per year. This means that consumer retail subscription service providers collectively generate 563 million sales per year by using promotional offers.

Our research also suggests that providers can boost their promotional sales by sending promotions more often. The more often consumers receive promotional offers, the more likely they are to purchase the products they feature. One-quarter of subscribers who receive promotions from

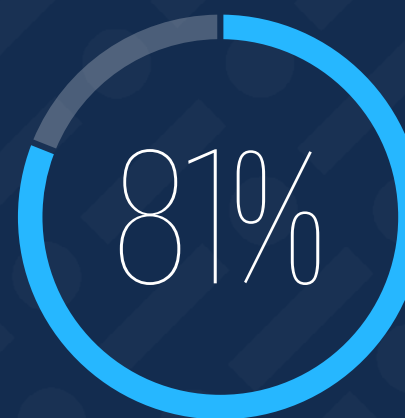
their providers at least once per week make purchases every time they receive a promotion, in fact. We also found that 49 percent of subscribers who receive promotions once per month to “a couple” of times per month purchase the products featured in promotional offers at least “some of the time.”

Sending too many unsolicited promotions can damage providers' relationships with their subscribers, however. Many providers have learned that automatically signing consumers up to receive promotional emails when they subscribe to their services can rub consumers the wrong way. Thirty-seven percent are instead opting to provide new subscribers the choice to receive promotional emails and messages during sign up while 23 percent still sign them up for promotional email lists automatically.

The “subscription-curious” consumer

More U.S. consumers report having subscription plans now than at any time since PYMNTS began studying subscription services in 2017. Eighty-one percent of consumers today have access to at least one type of subscription service. This is 5 percent more than the share that had at least one subscription in July 2020 and 12 percent more than the share that had one in February 2020.

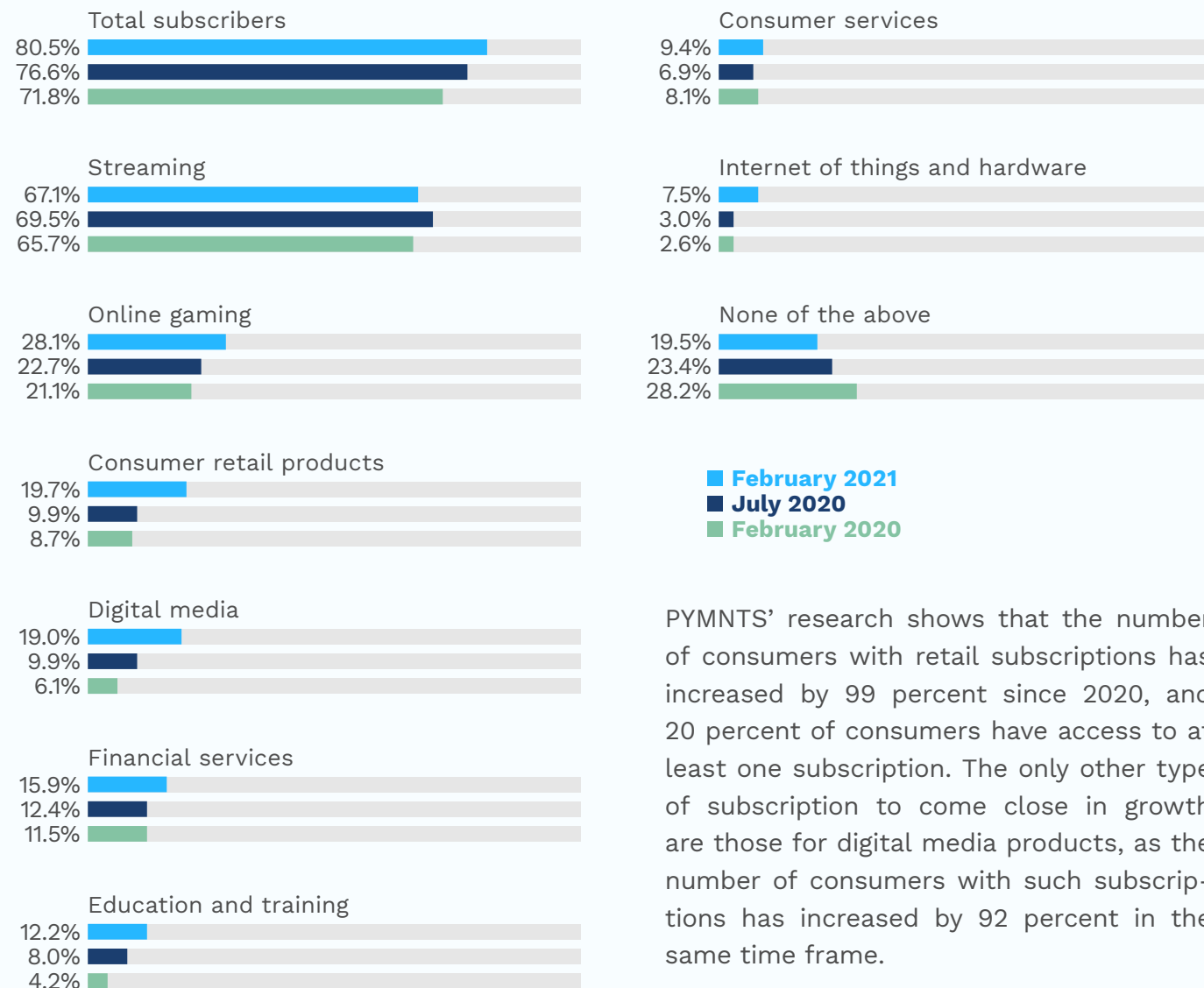
This shift has been largely driven by increase in demand for online gaming and digital media subscriptions — the two fastest-growing segments. Demand for consumer retail subscriptions outpaced all other services, however, becoming the fastest growing segment of all.



Eighty-one percent of consumers today have access to **at least one type of subscription service.**

FIGURE 1:
How many consumers are signed up for select subscription services

Share of consumers who have select types of subscriptions



PYMNTS' research shows that the number of consumers with retail subscriptions has increased by 99 percent since 2020, and 20 percent of consumers have access to at least one subscription. The only other type of subscription to come close in growth are those for digital media products, as the number of consumers with such subscriptions has increased by 92 percent in the same time frame.

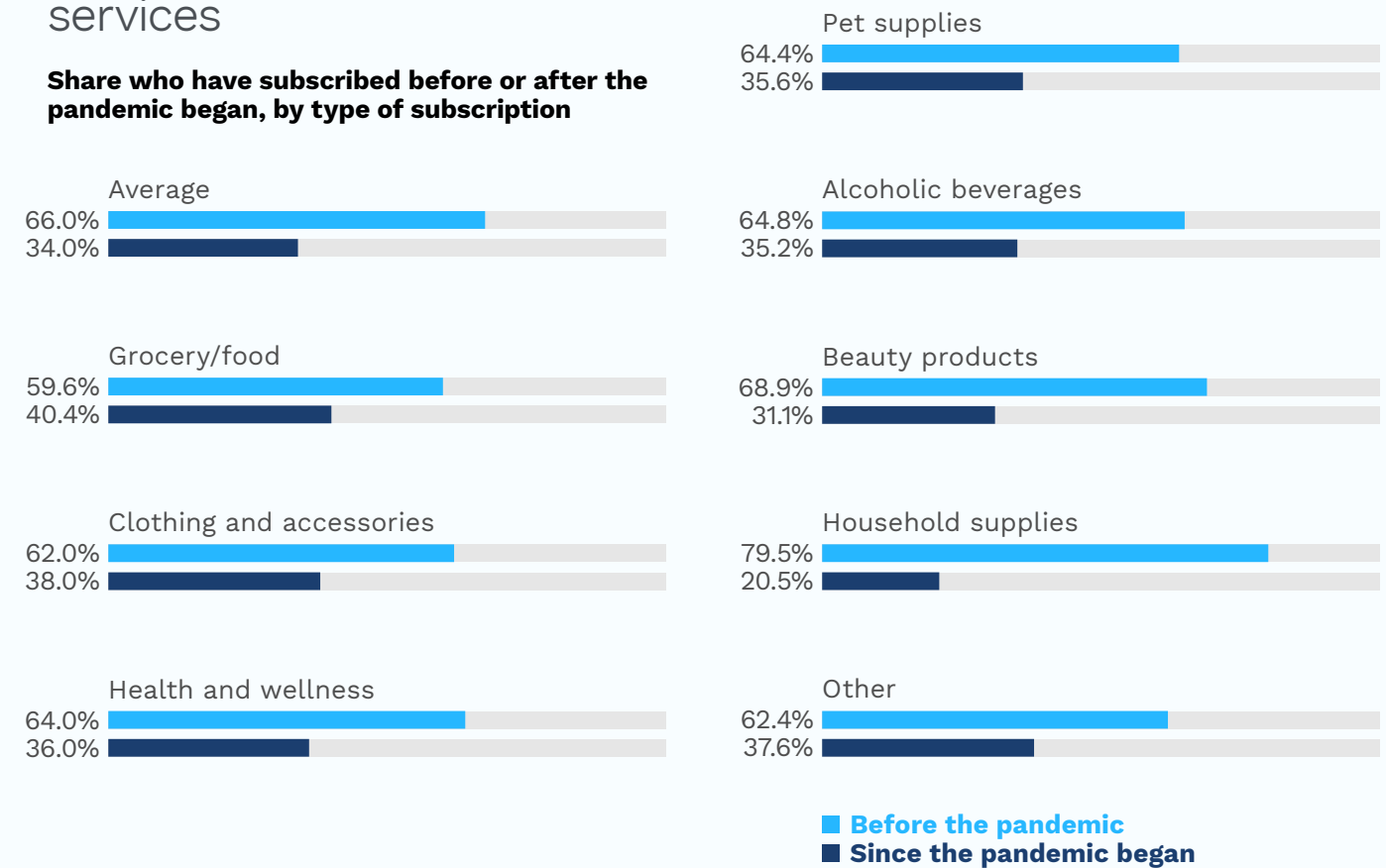
Not all of this growth may be attributed to the pandemic, but the crisis has nevertheless played a critical role in driving consumer retail subscription rates. Thirty-four percent of all consumers who have signed up for a new consumer retail subscription in the past year have done so since the pandemic began, on average.

Grocery and food subscriptions have experienced the largest growth of any type

of consumer retail subscription since the pandemic's onset. Forty percent of all consumers who currently have at least one grocery or food subscription signed up for them over the past year. Clothing and accessories and health and wellness subscriptions round out the top three as 38 percent and 36 percent of consumers with these types of subscriptions have signed up since March 2020, respectively.

FIGURE 2:
When subscribers signed up for their subscription services

Share who have subscribed before or after the pandemic began, by type of subscription





Beyond the sign-up: GETTING SUBSCRIBERS TO STAY

Consumers have become more open to trying new subscription commerce experiences in the past year, and service providers understand this. PYMNTS' research shows that subscription service providers are streamlining their online sign-in processes so that it takes less time for would-be subscribers to sign up for their services — a move

that can help them convert more of these subscription-curious consumers.

The result is that consumers can sign up for new subscriptions faster now than one year ago. It takes the average subscriber five seconds less to sign up for new plans in 2021 than it did in 2020, in fact.

FIGURE 3:

How long it takes to complete subscription sign-ups on top, middle and bottom sites

3a: Average amount of time it takes for consumers to sign up for new subscriptions, by date



3b: Average amount of time it takes for consumers to sign up for new subscriptions, by Index score

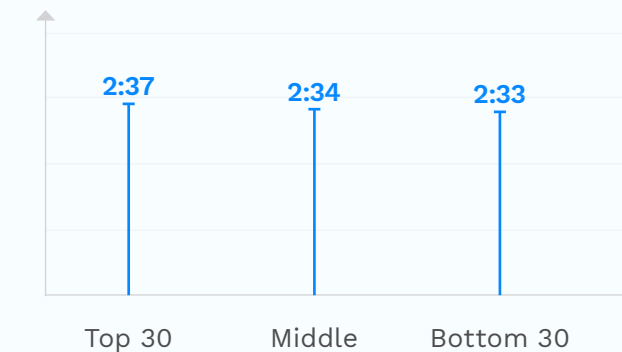
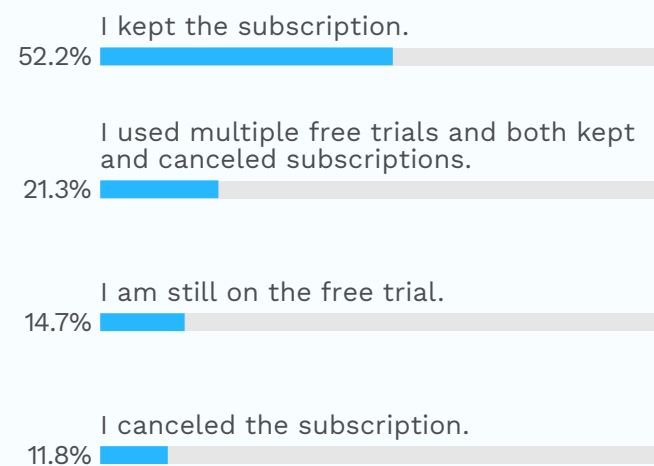
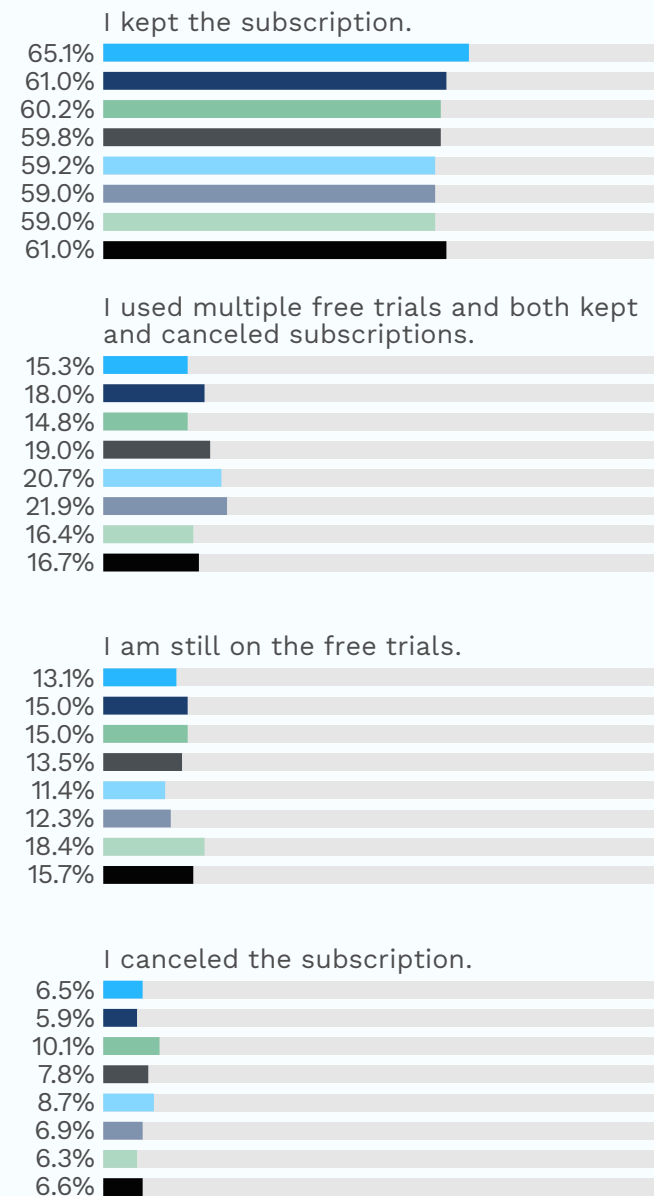


FIGURE 4:
How many consumers keep their subscriptions after their free trial periods

4a: Share taking select actions on their subscriptions after their free trials have ended



4b: Share taking select actions on their subscriptions after their free trials have ended, by type of subscription



- Grocery/food
- Clothing and accessories
- Health and wellness
- Household supplies
- Beauty products
- Pet supplies
- Alcoholic beverages
- Other

It is striking how similar sign-up times are across the board. It takes about as much time to sign up for new subscriptions on the 30 sites with the highest Index scores as it takes to sign up on the 30 sites with the lowest Index scores, with a difference of just four seconds (2 percent). This consistency shows that quick checkout times are no longer a key differentiator that can help providers stand out from their competition but rather a necessary part of the subscription commerce business.

Offering a quick and seamless sign-up process is only one piece of engaging and retaining subscribers, however. Consumers' approaches to subscription commerce has fundamentally changed during the pandemic, with only 52 percent of consumers who have used free trials since the pandemic started choosing to keep their subscriptions. Retention rates tend to be higher among consumer retail subscribers, but even these consumers do not hesitate to cancel subscriptions with which they feel dissatisfied. Sixty-five percent of consumers who have signed up for grocery and food subscriptions

whose free trials have ended since the pandemic began have kept and are paying for those subscriptions. The same can be said for 59 percent of consumers who have signed up for alcohol subscriptions and whose free trials have ended.

Numerous consumers also sign up for new subscription providers that offer free trials only to cancel them and then resubscribe to access the services for free, whether from the same service or a similar service from a competing provider. This problem is so pervasive that "serial free trialers" are now more common than consumers who use

free trials as a way to simply test new subscription experiences that might catch their interest. Fifteen percent of consumers with at least one subscription are on their first free trials and 21 percent of them have both canceled their subscriptions and signed up for more free trials so they could access subscriptions for free. It is not unheard of for these consumers to be on their second, third or even fourth free trials. Service providers must be able to offer their customers truly incomparable subscription experiences if they hope to convert subscription-curious customers to long-term subscribers.



Delivering on plan options and free trials

Free trials are undeniably easy to abuse, but consumers also see them as an integral part of their subscription commerce experience. Free trials can provide them the chance to test new services that might pique their interest, allowing them to explore whether certain subscription products and services suit their unique needs and expectations. They therefore stand out as a rare and differentiating subscription feature that is more commonly offered by top-performing providers that are looking to establish strong relationships with their customers from the get-go.

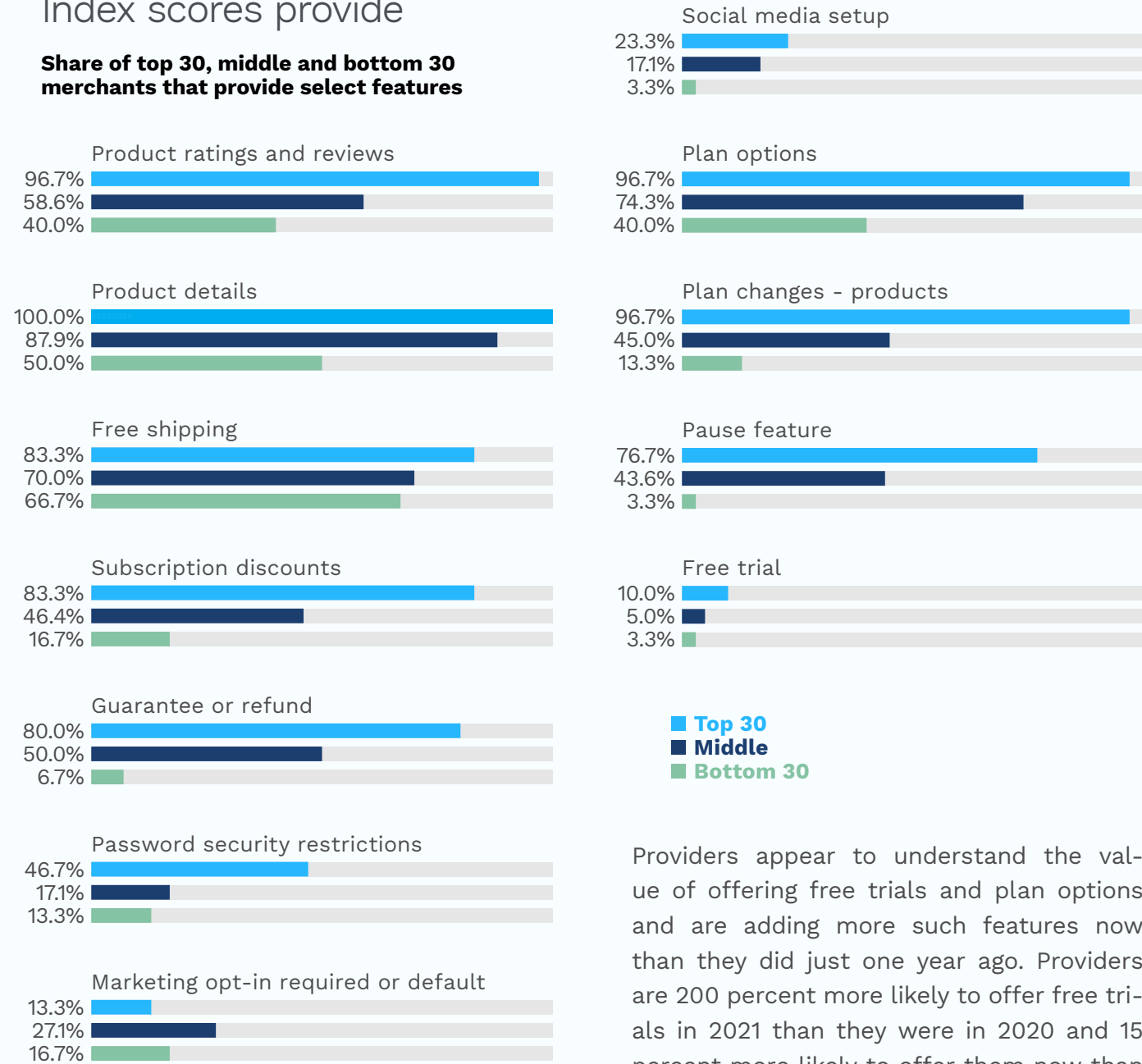
Plan options are another feature that top-performing providers offer to engage and retain subscribers. Top 30 merchants are also more likely to offer plan options, enabling users to change the terms of their subscriptions to their liking, such as by

providing new features or reduced prices. Ninety-seven percent of the top 30 merchants provide plan options compared to 74 percent of middle merchants and just 40 percent of bottom 30 merchants.

Our research also shows that pause features are playing an important role in retaining subscribers. Pause features allow consumers to halt their subscriptions for a time rather than forcing them to unsubscribe when their free trials are over or when they decide that they no longer want to keep paying for their subscriptions. This feature is far more commonly offered among top-performing subscription providers. Nearly 80 percent of the top 30 merchants offer pause features while just 3 percent of the bottom 30 merchants do the same.

FIGURE 5:
Features that subscription merchants with different Index scores provide

Share of top 30, middle and bottom 30 merchants that provide select features



Providers appear to understand the value of offering free trials and plan options and are adding more such features now than they did just one year ago. Providers are 200 percent more likely to offer free trials in 2021 than they were in 2020 and 15 percent more likely to offer them now than they were in 2019.

FIGURE 6:
Which features subscription service providers are offering

Share of providers offering select subscription features, by year

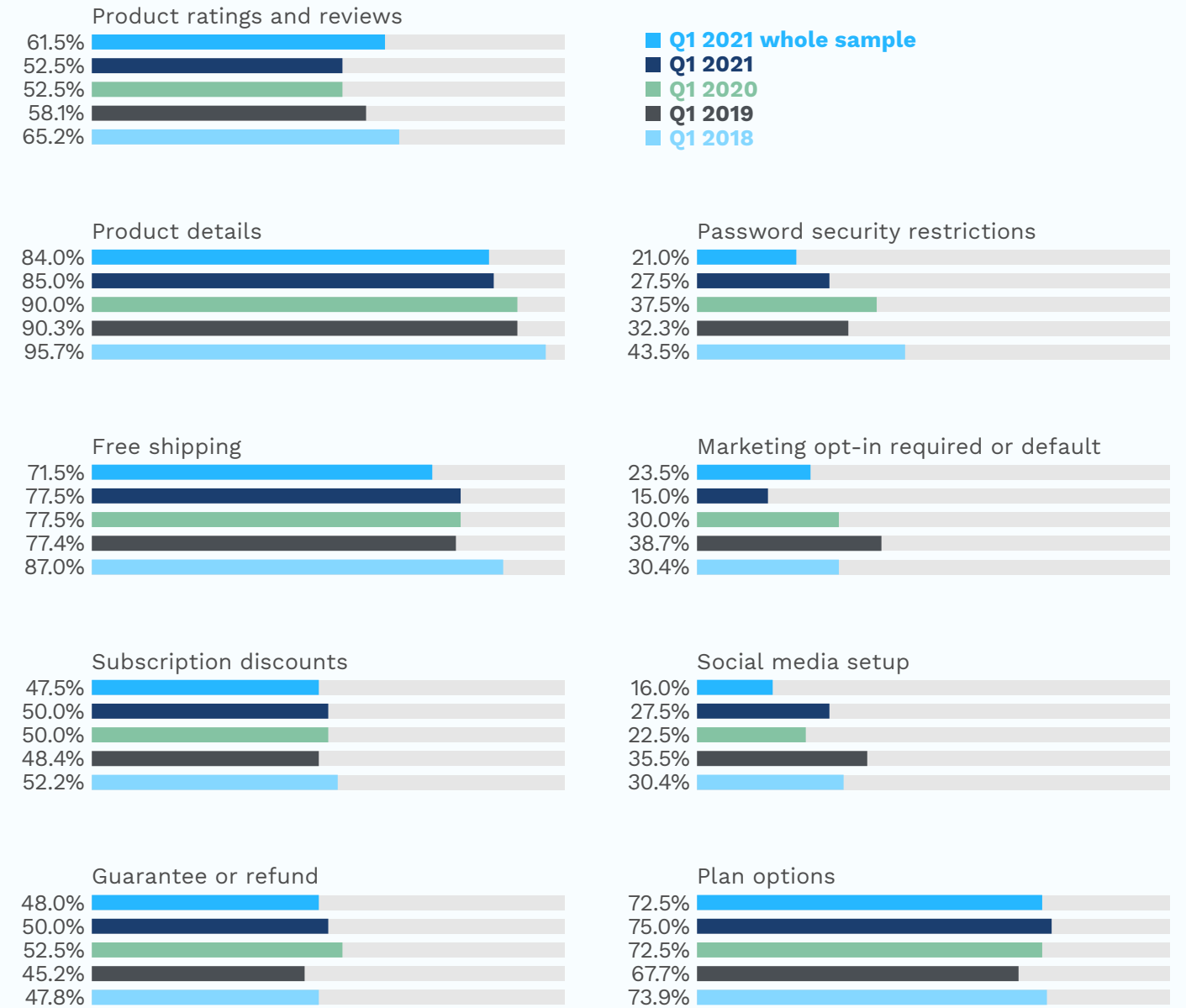
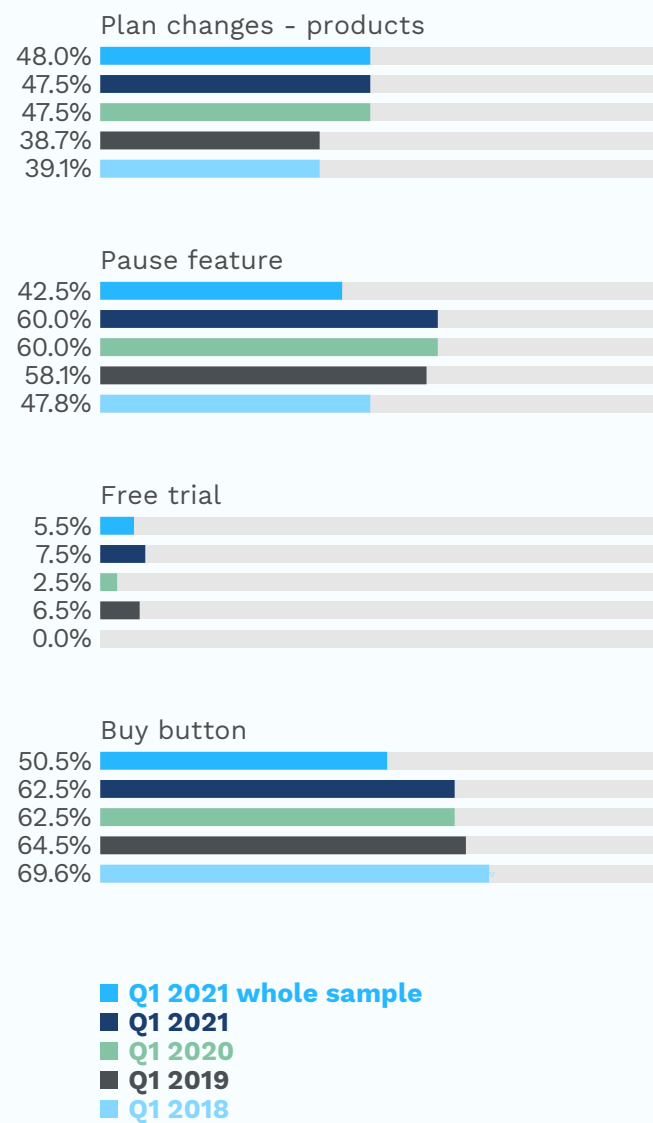


FIGURE 6 (continued):

Which features subscription service providers are offering

Share of providers offering select subscription features, by year



More providers offer plan options now than did so in either 2020 or 2019. Seventy-five percent of all providers now allow their subscribers to choose between various plan options, up 73 percent from 2020 and up 68 percent from 2019.

These improvements would normally help boost providers' overall Index scores. The trouble is that providers have also removed features that tend to inspire consumers' trust, including refund policies and password security requirements.

Twenty-seven percent fewer subscribers have security requirements to enter passwords, for example, which can make users feel less confident about data security. We also found that 5 percent fewer providers offer guarantee or refund policies in 2021 than did so in 2019, meaning consumers are less willing to subscribe to items that they are unsure they will like. Such setbacks effectively counterbalance the improvements that providers have made in the past year.

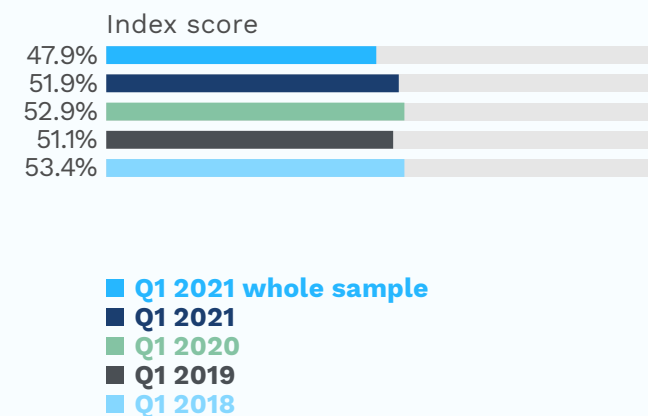
The end result is that subscription providers' overall Index scores have thus gone relatively unchanged in the last year despite having made improvements in their sign-up times, free trials and plan options. These providers' overall average Index score for 2021 is 52 — one point lower than last year.

Twenty-seven percent **fewer subscribers** have security requirements to enter passwords.

FIGURE 7:

How Index scores have changed over time

Average overall Index score, by year





"Must haves" and "nice to haves"

Consumers are using more subscription services than ever, but they tend to see subscription products as either "must haves" or "nice to haves." They also expect their providers to deliver very different subscription commerce experiences depending on which products they are purchasing.

Understanding the distinction between the experiences consumers want for their "must-have" purchases and their "nice-to-have" purchases is critical to optimizing their user experiences, and it begins with a look at consumers' expectations for subscription commerce as a whole.

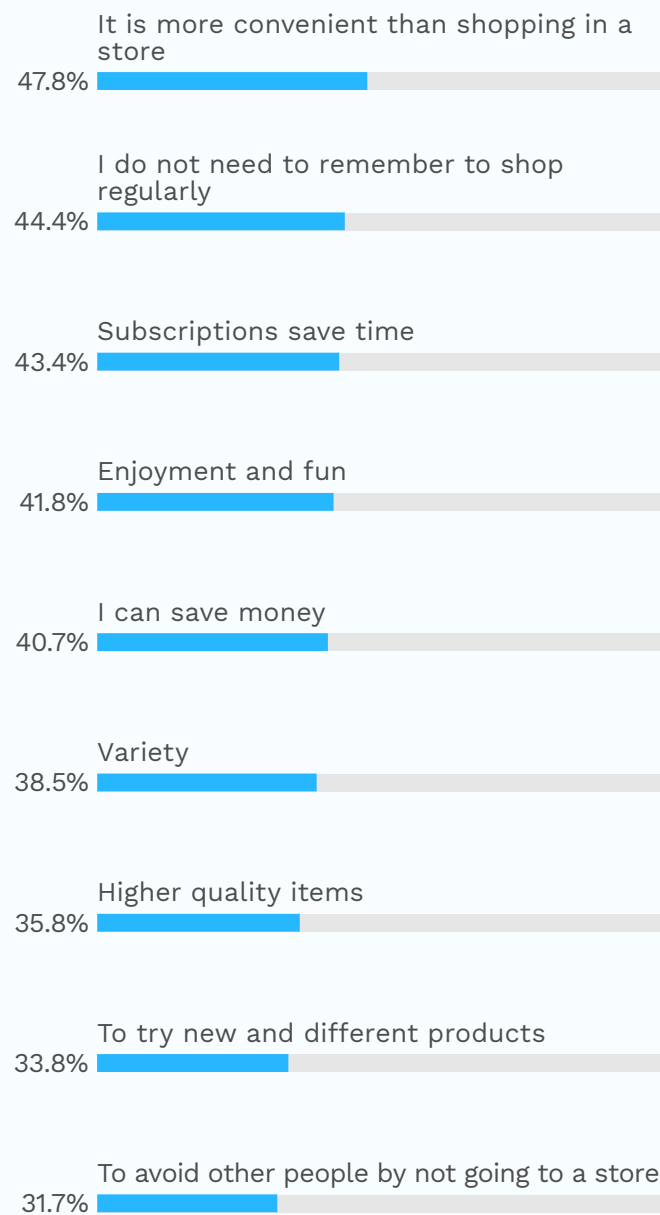
Convenience is the most common reason that consumers sign up for new subscriptions as 48 percent of subscribers cite it as a motivation for signing up.

Convenience is also related to the second-most common reason that consumers sign up for subscription services. Forty-four percent of subscribers say they signed up because doing so meant they did not have to remember to shop for products on a regular basis.

FIGURE 8:

Why consumers sign up for new subscription plans

Share of consumers who cite select reasons for signing up for the subscription plans that they have



A closer look at the reasons consumers give for signing up for specific types of subscription products and services reveals stark differences between their priorities for each, however. Consumers are especially eager to use subscriptions as a way to automatically make essential purchases, such as those for health and wellness products, pet supplies and household goods. Eighty percent of consumers who have health and wellness subscriptions have one for the convenience: Such offerings save them time and mean they do not need to shop regularly for these items. Eighty-four percent of consumers who have pet supply subscriptions and 82 percent of consumers who have household supply subscriptions have them for the same reasons.

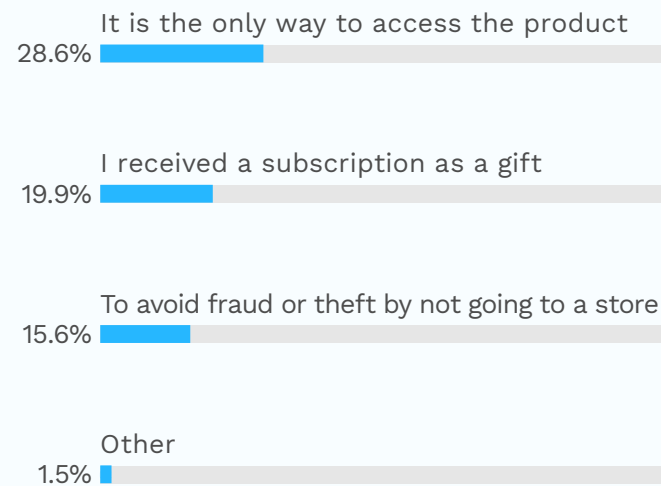
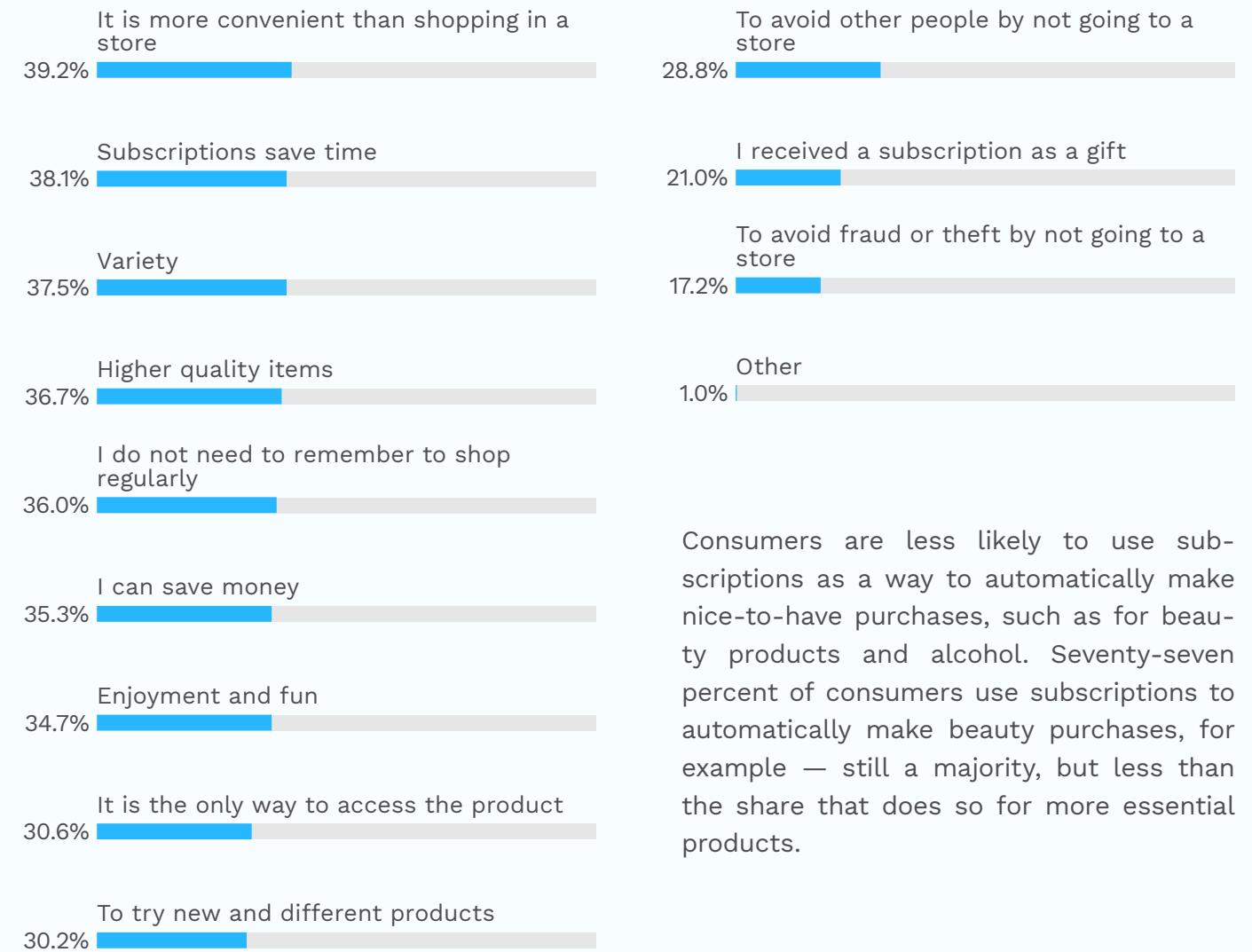


FIGURE 9:

How many consumers subscribe directly to brands

Share that cite select reasons for using D2C subscription services

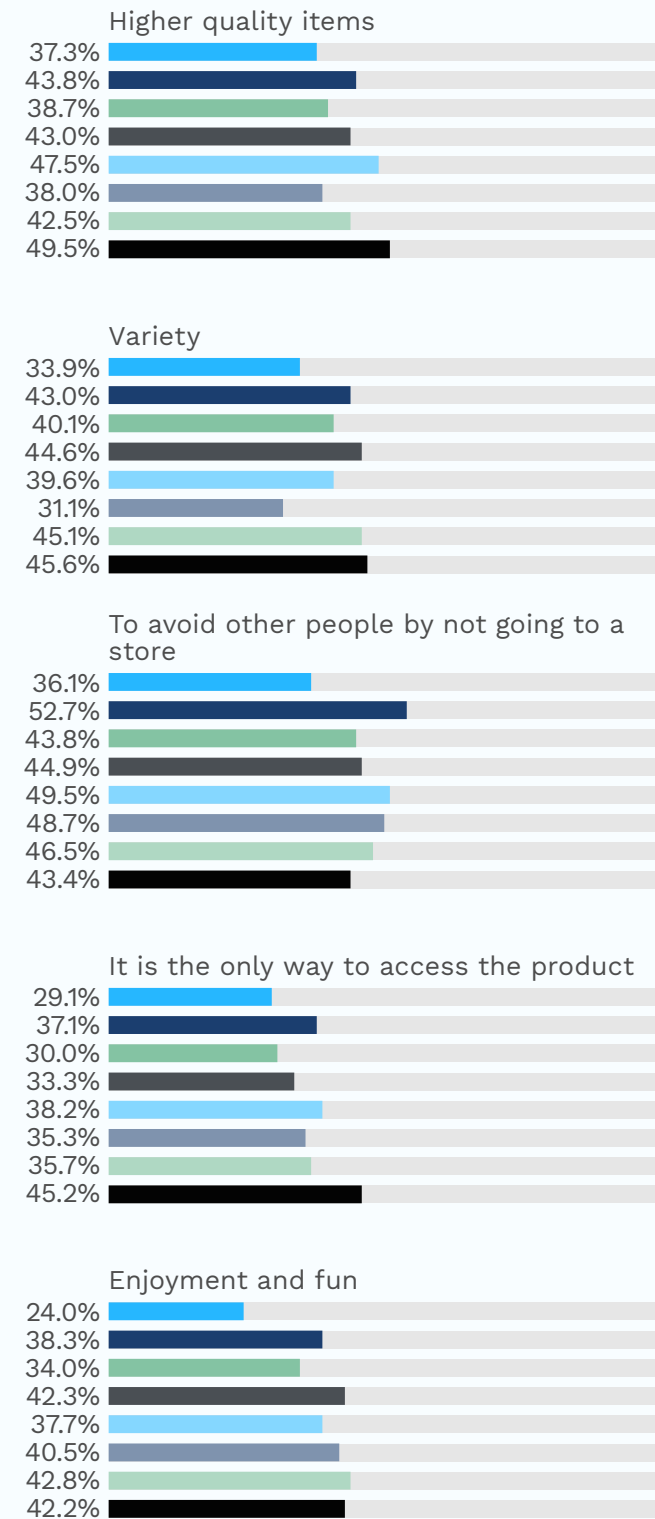
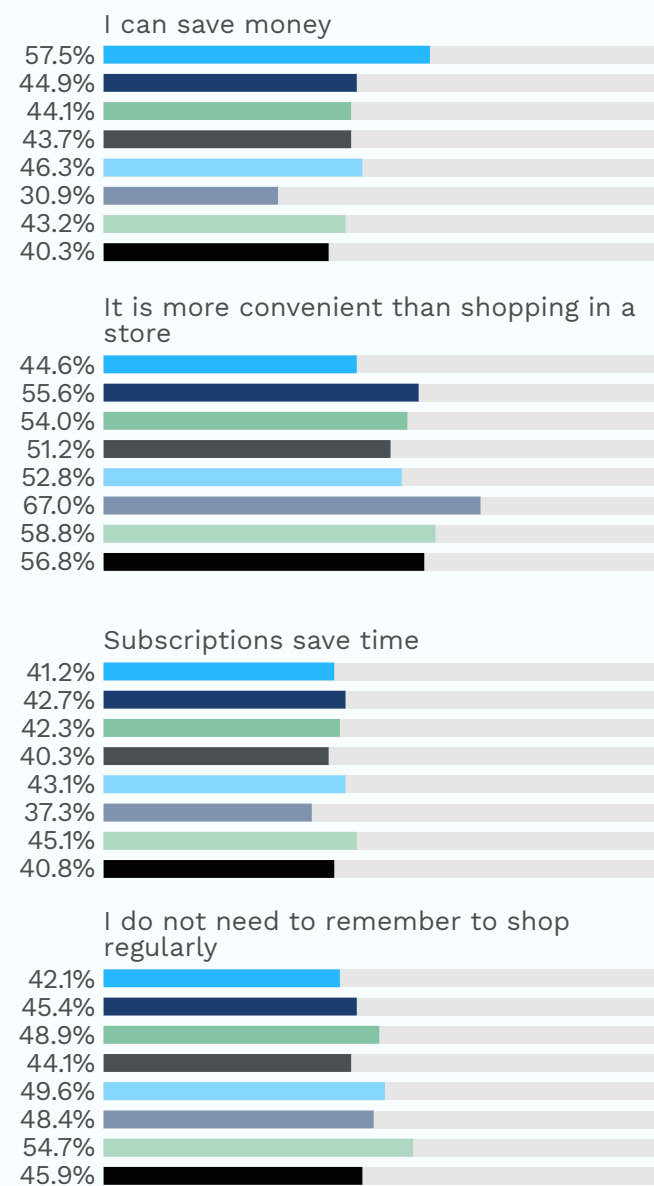


Consumers are less likely to use subscriptions as a way to automatically make nice-to-have purchases, such as for beauty products and alcohol. Seventy-seven percent of consumers use subscriptions to automatically make beauty purchases, for example — still a majority, but less than the share that does so for more essential products.

Their priorities for D2C subscriptions more closely mirror the priorities they have for nice-to-have products than for must-have products. Among the 57 percent of U.S. subscribers (23 million consumers) who have at least one retail subscription that allows them to purchase products directly from manufacturers, 80 percent who order directly from manufacturers do so because they want more variety, higher quality items, enjoyment and fun or because ordering directly is the only way to access the product. This shows that D2C subscription service providers must be able to offer their users more than convenience and ease of use if they hope to retain customers. They must also be able to deliver on their customers' demands for unique, personalized and enjoyable subscription experiences while fostering strong provider-subscriber relationships.

FIGURE 10:
How many consumers subscribe directly to brands for different products

Share that cite select reasons for using D2C subscription services, by type of subscription



- Household supplies
- Grocery/food
- Pet supplies
- Beauty products
- Health and wellness
- Alcoholic beverages
- Clothing and accessories
- Other

The low-down on promotions

Promotional emails and messages can be a powerful tool that providers can use to boost sales as half of all promotions that are sent ultimately convert to sales. PYMNTS' research shows that 48 percent

of all subscribers who receive promotions from their subscription service providers (31 million U.S. consumers) have purchased products offered through those promotions in the past year.

TABLE 1:

How many consumers make purchases when they receive promotions

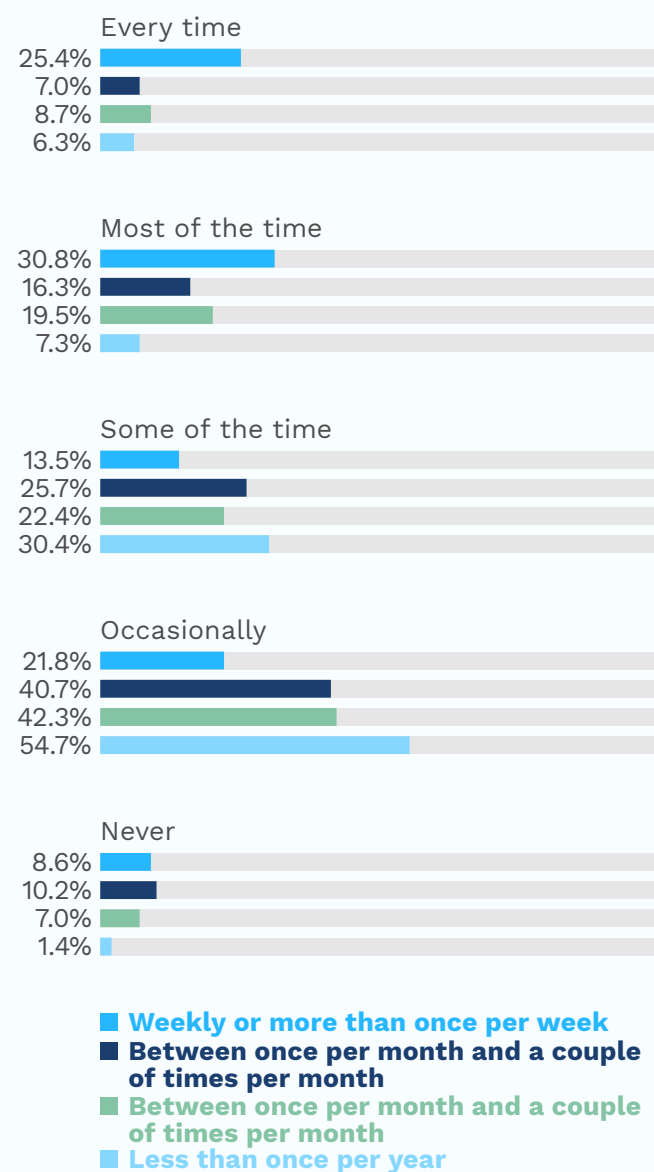
Number of consumers subscribed to consumer retail products	Current subscription provider	Third-party provider	Any type of subscriber
Number of subscribers who get offers	30.8M	18.0M	32M
Average number of offers received per year	37.9	45.3	61.9
Total offers received	1.2B	0.8B	2B
Share of offers accepted	48.2%	54.2%	50.7%
Total offers accepted	562.7M	442.2M	1B

Subscribers receive an average of 38 promotional offers per year and accept nearly half of them. This means that consumer retail subscription service providers collectively generate 563 million sales per year by using promotional offers alone.

Promotional offers that are sent more frequently have even higher conversion rates. The more often subscribers receive promotions, the more likely they are to buy products. Our research shows that 25 percent of subscribers who receive promotions from their providers on a weekly basis make purchases every time they receive a promotion, in fact. Among subscribers who receive promotions once or twice per month, only forty-nine percent purchase the products featured in those promotions, and they only do so some of the time. It is easy to see why subscription service providers might be eager to send promotional messages and emails to their customers as often as possible.

FIGURE 11:
How often consumers make purchases when they receive promotional emails

Share who make purchases with select frequency, by how often they receive promotions



Signing new subscribers up to receive promotional material is not always the best way to boost conversion, however. Our research consistently shows that consumers do not like being automatically added to promotional email lists when signing up for new subscription services, and some providers have learned this the hard way. Many have therefore stopped adding new subscribers to marketing lists automatically: 23 percent of all subscription service providers use automatic marketing opt-ins in their online sign-up processes, and another one percent requires new subscribers to opt in to receive marketing emails.

Far more providers now allow new subscribers to choose whether to be added to promotional email lists, which consumers tend to see as less imposing, empowering their subscription experiences. Thirty-seven percent of all providers give new subscribers this option.



23 percent of all subscription service providers use **automatic marketing opt-ins** in their online sign-up processes.



Conclusion/ Methodology

The pandemic has radically altered the subscription commerce ecosystem in the United States. Consumers' appetite for new, unique subscription commerce experiences is stronger than ever, and they expect their providers to allow them to test run new subscription plans so they can determine whether certain offerings suit their individual needs and expectations. In concrete terms, this means providing users with faster, more seamless subscription sign-up experiences coupled with more choice and variety in their subscription plan offerings, whether by providing free trials, pause features, a diverse array of test options or the choice to receive promotional material.

Providers have already implemented many of these improvements, but they are still struggling to move the needle on consumer trust. Those that go the extra mile to ensure their customers feel as though their information is secure while also delivering convenient and unduplicable shopping

experiences have a chance to stand out from their competitors and overcome the mercurial shopping habits that have become emblematic of consumers in the subscription commerce market.

Methodology

The Subscription Commerce Conversion Index draws from a survey of a census-balanced panel of 2,022 adult U.S. consumers and a complimentary study in which PYMNTS researched the online subscription sign-up processes of 210 subscription commerce providers across more than 9 industries. Respondents to the consumer survey were an average of 41 years old, 53 percent were female and 44 percent earned more than \$100,000 in annual income. Each study was conducted during the first week of February.

About

PYMNTS.com

PYMNTS.com is where the best minds and the best content meet on the web to learn about “What’s Next” in payments and commerce. Our interactive platform is reinventing the way in which companies in payments share relevant information about the initiatives that shape the future of this dynamic sector and make news. Our data and analytics team includes economists, data scientists and industry analysts who work with companies to measure and quantify the innovation that is at the cutting edge of this new world.

sticky.io

Headquartered in San Francisco, [sticky.io](https://www.sticky.io)® is a leading subscription commerce platform that helps brands build lasting bonds with customers. Consumers today expect authentic and personalized experiences when they interact with brands. Being able to deliver the right message and offer at the right time can mean the difference between loyalty and churn. With 450+ partner integrations and over 10,000 merchants processing more than \$4 billion in transactions annually, sticky.io is a flexible, API-driven solution built to maximize recurring revenue. To learn more, visit www.sticky.io.

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Subscription

COMMERCE CONVERSION INDEX

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