

# 83%



is the percent of ISVs analyzed by TSG in 2019 that were found to **offer card acceptance.**

Source: TSG analysis

~ **4 Days**



is the average number of **days** it takes to **launch** an **eCommerce** website and begin accepting payments. Though some providers can have merchants up and running in less than **30 minutes.**

Source: TSG Mystery Shopping Research

# ~350,000



is the estimated number of gas pumps in the U.S. in need of an upgrade to meet the EMV compliance deadline of Oct. 2020.

Source: TSG analysis, CSP Magazine

# \$5.4 trillion

is the estimated 2018 processing volume of the **top 10 U.S. merchant acquirers**, totaling over **107 billion** transactions.

Source: TSG Analysis

# ~600,000

is the estimated number  
of card-accepting  
merchants in **Mexico.**



Source: TSG Analysis

95% 

of all new terminals shipped in  
the U.S. are **NFC** enabled.

Source: Visa

# \$6.7 trillion

in total estimated U.S.  
payment network volume in  
2018.



Source: TSG estimates, payment network financial records

# 29%



of the estimated top 300 U.S. merchant acquirers do not market a smart terminal or cloud POS solution.

Source: The Strawhecker Group's Directory of U.S. Merchant Acquirers



80% 

of total U.S. card processing volume was generated by **10** U.S. merchant acquirers in 2018.

Source: The Strawhecker Group's Directory of U.S. Merchant Acquirers

# EASE



was the **#1 reason** SMBs surveyed by TSG selected their card processor.  
**Price was second.**

Source: The Strawhecker Group survey of U.S. SMBs



is the estimated average number of **alternative payment methods** offered by U.S.-based merchant acquirers that serve merchants in **EMEA**.

Source: The Strawhecker Group Market Intelligence Research. An alternative payment method is defined as a payment method that does not leverage traditional card networks, cash or check; e.g. SOFORT

~75%

of the **Brazilian** acquiring market share is owned by **two acquirers.**



Source: TSG Institutional Knowledge

27%



is the estimated percent of **pharmacy ISVs** that do not have card payment acceptance functionality.

Source: The Strawhecker Group Market Intelligence Research



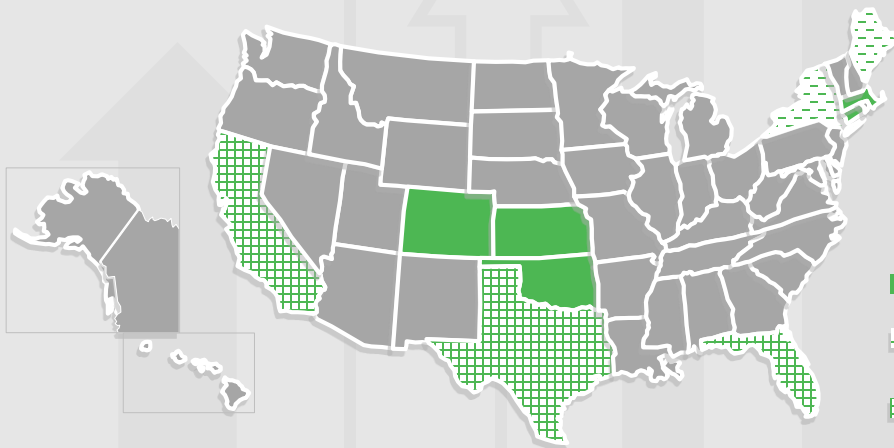
# 57%



of merchants that use an ISV in the  
'health & beauty' space are served by  
**25 ISVs.**

Source: The Strawhecker Group Market Intelligence Research. Health & beauty = fitness centers, salon/barber shops, and spas

**10** states have **credit card surcharging** laws, but this is changing and not all are equally enforced.



- States that Limit or Regulate Surcharging
- ▤ States that Require Additional Disclosures
- ▧ "No Surcharge" Laws Either Declared Unconstitutional or Deemed Unenforceable

Source: TSG Institutional Knowledge, CardX; As of October 2019; Please consult with legal counsel regarding state and federal surcharging laws.

**>50% YOY**  
**Volume Growth**

is not uncommon for the  
**fastest growing**  
payments companies.



Source: TSG Institutional Knowledge





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