

CTVG

CONVENIENCE TECHNOLOGY VISION GROUP

CTVG MEMBERS



VISION GROUP NETWORK CO-FOUNDERS



Pivotal Moments for Convenience Foodservice Technology

Includes Cybersecurity Updates

CTVG VISION REPORT NO. 10
APRIL 2025

FACILITATOR



Ed Collupy
Collupy System Solutions LLC.

FEATURED SPEAKERS



Robert Grimes
President and CEO, International
Food and Beverage Technology
Association (IFBTA)



Cameron Watt
President & CEO, Intouch Insight



sharing today to shape tomorrow

We are Convenience Technology Vision Group (CTVG), a group of invited leaders of the convenience industry who have volunteered our time to help our fellow retailers, solution providers and product suppliers. The only reason we gather is to discuss, debate and share our experiences and ideas. Each of us is offering our personal opinions. We are not looking for “group think” — we are promoting problem solving and looking to the future. We make our conversations available to everyone in the industry through CTVG Vision Reports. These reports will help you better understand current challenges, solutions, and opportunities while giving you access to different opinions and perspectives, regardless of the size of your business.

Convenience Technology Vision Group is part of the Vision Group Network, whose mission is to gather the best minds in the industry, put them in a virtual room, and let the ideas and opinions develop

This **CTVG Vision Report** is comprised of three parts:

CTVG Views provides a summary of the conversation with additional resources for extra context including “Valuable Resources” for more in-depth education.

In The Room With CTVG provides you with the meeting transcript, tagged for easy reference, so that you can be “in the room” with us, rather than only having access to selected quotes and paraphrasing.

Both presentations, “**Operational & Consumer Feedback**” and “**Foodservice Tech Trends & Opportunities**” are included and linked throughout the transcript for easy navigation.

We highly recommend that you read all components.

The main topics in this CTVG Vision Report:

The Outlook for Foodservice Technology: Operational and Consumer Feedback and Tech Trends and Opportunities

Opportunities and Obstacles: Integration Challenges, Understanding Consumer Expectations, New Innovations, and Enhancing Efficiency

Streamlining the Food-to-Customer Pipeline: Mobile Ordering and Kiosks, Drive-Thru, and Delivery

CTVG Lightning Round: Cybersecurity Review



CTVG thanks our **Ally Supporters**



For retailers looking to connect with their consumers in an always-on world, Rovertown's app platform provides the flexibility needed to deliver personalized, meaningful experiences. Unlike our competitors, Rovertown integrates with any technology vendor and goes the extra step to ensure our clients' success through best-in-class implementation and support.

Rovertown was originally founded in 2009 with the goal of helping cost-conscious college students across the United States to access the best discounts for local food and services. By eliminating the need to swipe an ID for discounts, the experience was brought to students' mobile devices in real-time with custom, localized deals.

Rovertown's business has since grown and evolved, but the humble beginnings taught the team the power of personalized experiences delivered through high-quality, branded apps. The Rovertown app platform now powers the mobile experiences of many leading regional convenience retailers.

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ALLY SUPPORTER SPOTLIGHT

Rovertown recently partnered with NACS to raise consumer awareness about swipe fees through messaging in the Weigel's and Y-Not Stop apps, encouraging users to advocate for reform. Nearly 3,000 letters have already been sent to congressional representatives. Learn more from [this NACS Daily article](#).



With over 15 years of experience in the convenience store industry, Abierto understands the challenges retailers face in engaging consumers with on-premise messaging. Leveraging cutting-edge technology and dedicated in-house software development and design teams, we create custom, innovative, and integrated digital consumer engagement and messaging solutions tailored for multi-site convenience store retailers.

Headquartered in York, Maine, Abierto powers displays for leading industry retailers nationwide. Our advanced cloud-based platform, OPEN., is a robust yet user-friendly tool that automates digital content distribution and remote device management tasks across store networks. OPEN. also provides detailed content distribution analytics, enabling retailers to optimize their in-store messaging.

In 2020, we introduced OPEN.LED, a groundbreaking line of transparent, adhesive window displays designed to increase in-store traffic by dynamically engaging consumers in the forecourt and parking areas of convenience stores and travel plazas. Today, these displays sport stunning high resolution and brightness for an "impossible to ignore" messaging experience.

Abierto's team of seasoned designers, engineers, developers, and implementation experts work together to help clients execute their vision with precision and creativity. Execute your Vision with Abierto!

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You may know us as Gilbarco Veeder-Root, but it's time to get to know Invenco by GVR. In 2023, Gilbarco's well-established Retail Solutions division merged with Invenco, a global frontrunner in the payments and convenience store sectors. Our combined expertise is set to revolutionize the convenience retail space, offering cutting-edge, flexible technology solutions designed to boost efficiency and enhance customer engagement.

Invenco by GVR has a global footprint with industry-leading point-of-sale systems, payment solutions, site automations, workflows, and cloud services. These solutions will be integrated into the ground-breaking iNFX retail operating system to enable digital agility and rapidly deploy new capabilities to our customers. Invenco by GVR Solutions can be found in nearly 165,000 connected devices across 50,000 convenience stores in more than 50 countries. We are redefining convenience, together.

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ALLY SUPPORTER SPOTLIGHT

Passport Express Ordering solution takes your foodservice program beyond your four walls allowing you to effectively compete with local QSRs on more than just food! Reach busy consumers wherever they are—at the dispenser, drive-thru, or through mobile ordering. [Learn More.](#)



GK Software breaks down the barriers to unified commerce with its open CLOUD4RETAIL platform and a broad portfolio based on it, like OmniPOS for point of sale, self-checkout, mobile POS, GK Drive for forecourt control, mobile customer engagement and a full range of store/back-office solutions. The company is a recognized leader in omnichannel retail, offering a single, global software platform for all retail formats and touchpoints. Ten of the Top 50 retailers worldwide rely on GK, and GK is the fastest growing global POS provider in new installations over the last three years.

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CTVG VIEWS

A CONVENIENCE TECHNOLOGY VISION GROUP DISCUSSION

Foodservice in convenience is at a pivotal moment as retailers strive to leverage technology to enhance the customer experience, drive efficiency and increase profitability. At the CTVG March quarterly virtual meeting, members examined consumers foodservice trends, tech solutions and innovations, first hearing two presentations on the topic, then discussing concerns, challenges and solutions.



Pivotal Moments for Convenience Foodservice Technology

At the CTVG quarterly virtual meeting on March 7, 2025, CTVG Advisor and Facilitator **Ed Collupy**, principal of Collupy System Solutions LLC, kicked off the meeting stating the importance of foodservice in convenience retailing, a hot topic at several recent Vision Group meetings, including Connexus Vision Group (CxVG), the newly launched Convenience Foodservice Vision Group (CFVG), and the Global Convenience Group (GCVG), another newly launched group.

Cameron Watt, president and CEO of Intouch Insight and **Robert Grimes**, founder and CEO of the International Food and Beverage Technology Association (IFBTA), were invited to present their insights from the perspective of consumer engagement and foodservice innovation. After the presentations, members and presenters had a lively discussion and Q&A.

Other Foodservice Innovation Vision Group Reports

Several Vision Groups have recently explored foodservice innovation. Download these other Vision Reports to read more on this topic from various points of view.

***CxVG Third-Party Delivery:
A Double-Edged Sword?***
March 2025

***CFVG The Power of Sensory
Science in Convenience Retail***
February 2025

***GCVG Do You Want Chips With That?
The Emergence of Robotics in the
Global Foodservice***
April 2025

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The Outlook for Foodservice Technology

Operational and Consumer Feedback

Watt presented new and on-going consumer research findings on foodservice in convenience stores. He emphasized that technology should enable business success and customer satisfaction, not be implemented for its own sake. Watt highlighted the significant shift in consumer perception of convenience stores as a destination for food: “Forty-five percent, so less than half, of the people in 2022, thought that a convenience store was a legitimate alternative to a restaurant to eat. Today it’s 72%. It’s almost three quarters.” He highlighted that most people eat in their car, either while driving or parked, with some uptick for dining in-store.

Watt also shared detailed results from consumers on delivery, kiosks, drive-thrus, and mobile ordering. With third-party delivery, convenience stores were believed to be slightly faster than restaurants, but scored lower on most metrics, particularly customization (45% in c-stores versus 89-100% in restaurants) and food temperature. While deliveries of c-store food “were faster, it arrived colder.” To address food temperature issues, he suggested reducing hold times, improving warming technology, or using alternative packaging.

With kiosks, Watt noted that “it takes longer to order at a kiosk, but accuracy is improved,” and customer satisfaction was higher despite slower service because customers maintain control of the ordering process. For mobile order pickup technologies, Watt emphasized that “people had a much higher satisfaction level when they could just pick up their own order without wait time, no interaction,” noting this combines the benefits of customer-controlled ordering with speed and convenience.

Addressing drive-thru innovations, Watt presented data from new concept restaurants with advanced technologies, finding that newer isn’t always better when it comes to speed. He stressed that physical infrastructure must be designed to accommodate new technologies, such as dedicated lanes for mobile orders, and highlighted that technical details like speaker quality significantly impact both speed and accuracy perception in the drive-thru experience, making these important considerations for convenience retailers exploring or analyzing drive-thru.

“Speed of service is important because ... the overall satisfaction rating for these brand new innovative restaurants with really cool designs are supposed to be better, stronger, faster, sexier, they did not get as high a satisfaction rating as the legacy units did.

And I think that a lot of that comes down to the fact that they were just simply [slower] and it’s drive-thru. People want speed. It’s just that simple.

Cameron Watt, President and CEO, Intouch Insight

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Tech Trends and Opportunities

IFBTA is a membership organization promoting foodservice technology for retailers and suppliers and is led by Robert Grimes. Grimes presented foodservice technology trends and opportunities shown at recent association events, including the January NRF Show where IFBTA was the concept developer of the Food Service Innovation Zone. Positioning himself as “a restaurant manager who happens to be in technology,” Grimes emphasized that technology should be viewed as an enabler rather than a solution. He identified ‘personalization’ and ‘frictionless’ as key industry buzzwords for 2025, noting, “I’ve recorded two podcasts in the last two days... and frictionless and personalization

are those words that came up like 10 times.”

Just like Watt, Grimes highlighted delivery and drive-thru, and also added a hot new hotel and restaurant innovation: vending, especially for pizza.

Grimes identified several helpful innovative technologies for convenience retail including generative AI for operations and recipe management, robotics for back-of-house food production, and electrification that eliminates the need for natural gas saying: “The real reason I bring this one up is because you don’t have to install gas lines anymore to go ahead and put in fresh food cooking, which means that that now just opened up the whole food-service market to you.” He also discussed **sous vide** cooking as an option for offering freshly made food with extended shelf life.

Regarding technology integration, Grimes observed a gap in the convenience industry: “When I walk around NACS (Show) I do not see much in the way of foodservice technology. I see people jury-rigging what’s being used in retail stores or at the gas pumps to be able to do food and beverage.” He identified key innovations that convenience retailers could leverage from the restaurant industry including their POS systems, drive-thru technologies, online ordering systems, catering, and delivery capabilities, with interesting crossover potential from unexpected sources: “The only delivery service in the (NRF) Food Service [Innovation] Zone wasn’t Grubhub,

DEFINING TERMS

Sous vide

Sous vide is a cooking technique where food is vacuum-sealed and cooked in a precisely controlled water bath, achieving perfect doneness throughout without overcooking, while maintaining tenderness and juiciness, especially beneficial for meats. Beyond improved cooking results, the method extends food shelf life through its vacuum-sealed environment that removes oxygen, prevents contamination, and with precise pasteurization that eliminates harmful bacteria.

When properly cooled and stored in the original packaging, sous vide foods can last 1-2 weeks refrigerated versus 3-5 days for conventionally cooked items, making it valuable for both commercial kitchens and home meal preparation. Sous-vide has been available since the 1970’s and more widely used in the U.S. since the 1980’s. Major chains like Starbucks, Panera Bread, and Shake Shack have begun promoting sous vide prepared chicken menu offerings.

DoorDash, or Uber Eats. It was Instacart. I thought [it was] was fascinating that a grocery company is actually now in foodservice. And that’s where we’re going to see that ahead.”



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Opportunities and Obstacles

The CTVG member discussion emphasized the challenges retailers face as they strive to enhance customer experience and leverage disjointed technologies to drive efficiency and profitability.

Integration Challenges

CTVG members repeatedly emphasized the challenges they encounter when integrating foodservice technology with diverse product categories (food, fuel, merchandise, and services), citing functional issues between legacy systems and emerging technologies, and franchise specifications.

Several members addressed the challenge of integrating foodservice with fuel-based POS systems. **Donnie Rhoads**, director of business development for The Convenience Group, LLC, questioned whether to integrate foodservice with the existing C-store systems or keep them separate. **Jeffery Carpenter**, director of education and training at Cliff's Local Market, came at the same problem from a different angle, considering themselves a foodservice operator first in terms of technology, and built the rest of the systems around foodservice in order to maximize customization options. But he admits it isn't an easy proposition. **Ant Raimato**, store technology engineering lead at Wawa Inc., said the compromise is to find the one offer to focus on. "You have to pick that one thing and really place your big bets on what you think has the best impact for your individual sites and for your customers – what you think they are going to get the most enjoyment out of, and really target back to them what value you can bring through either integrations, through loyalty, through hot, fresh foods. It's quite a balance. There's no perfect answer."



“ I feel the pain being shared by everybody. I think we have the same kind of situation where we have a back-office solution. We have a legacy POS at the pump, and now we are trying to bring foodservice technology in the picture.

So there's a lot of integration, and if there is available integration...I haven't found any solution that can integrate well with the legacy POS system or the current back office solution. So it's very hard to deploy our foodservice solution seamlessly, and it requires technology out there in the market.

Sanjit Bajimaya, IT Director, Loop Neighborhood

Eastern Petroleum Corporation's VP of Technology **Bill Ridge** also shared the difficulty faced by fuel-branded convenience stores due to POS limitations, which he feels hinders the implementation of apps, online ordering, and kiosks. He said bluntly: "Being branded has killed us. It hasn't 'killed' us, but it's made everything very, very, very hard." Ridge elaborated on the problem of food orders being treated as department sales, which complicates loyalty programs and pricing strategies, as well as payment issues across systems. Loop Neighborhood's IT Director **Sanjit Bajimaya** echoes this pain, noting the difficulty of finding a foodservice solution that seamlessly integrates with legacy POS and back-office systems.

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Jason Collins, director of IT for Englefield Oil Company, **Steve Evans**, chief technology officer at Haffner's Energy North Group, and **Rance Wells**, vice president of IT at Toot'n Totum, all basically said they dream of one perfect system that does everything but for now they just deal with multiple systems and adding employees in each section of the store. While **Roy Austin**, director of information technology at Graham Enterprise, Inc., said he hasn't had an issue yet with needing a specialized food system, he empathizes with those with major oil company supported systems being difficult to work with.

Grimes suggested standardizing the back office system to pull data from various POS systems,

rather than forcing a POS change. While acknowledging he wasn't focusing on the fuel side, he advised starting with the software selection based on required functionality and features, followed by hardware and services.

Many convenience industry POS systems are outdated and don't support open integration, affirmed **Bill Miller**, vice president, head of sales for GK Americas. He anticipates increased competition among POS providers will drive change in coming years as they work to maintain relevance. **Paul Kern**, product leader at Invenco by GVR, noted that while major oil-approved POS systems don't always offer complete integration, they're trending toward more open platforms

store employees. This difference emphasizes that retailers need to customize their technology based on their target customer groups, ensuring that tech choices align with their overall brand promise. Watt emphasized that retailers should first define their ideal customer experience before selecting technologies, as these tools should ultimately reinforce the brand's promises.

“ I do think we're still trying to get our technology to catch up to the brand promise and the needs of our employees to deliver that brand promise, but I think it always has to be the brand that comes first..

Emily Sheetz, Executive Vice President of Strategy and IT, Sheetz

Emily Sheetz, executive vice president of strategy and IT at Sheetz, agreed that the brand must come first, with technology catching up to meet brand promise and employee needs. **Rick Sales**, president of Abierto, stressed that technology cannot create a brand experience but enable it, noting the importance of matching a retailer's capabilities with their brand promise.

Related Vision Group Reports

Related discussions have been held at previous CTVG meetings, including a special meeting with POS providers to discuss integration challenges. Read these related Vision Reports to learn what was discussed at those meetings.

CTVG TO THE POINT: The Evolving State of POS in Convenience Retail, October 2023

CTVG In Focus: A CTVG Conversation with POS Solution Providers, November 2023

Understanding Consumer Expectations

Another key focus of the conversation was how to understand and fulfill customer expectations. The discussion highlighted that consumer preferences differ by age group when it comes to self-checkout and kiosks. Watt noted that younger shoppers typically prefer self-checkout because they find it faster and desire less human interaction, while older customers value personal assistance from

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New Innovations Spur Development

Emerging technology enablers, such as AI, robotics, and IoT, were explored for their potential to enhance foodservice operations and customer engagement. **Steve Morris**, president of Retail Management Inc. who was unable to attend the meeting, previously shared with Collupy their plans with UpDog AI technology to monitor and react to roller grill activity.

Eva Strasburger, president of StrasGlobal, CEO of Compliance Safe, and Vision Group Network co-founder, introduced a concept from AI robotics company Circus, capable of creating multiple fresh meals quickly, although she noted that some C-store operators expressed reservations about the lack of customer interaction. The potential of using robotics in back-of-house operations or in dark kitchens for delivery was also mentioned.

Enhancing Efficiency

Operational efficiency was another significant theme, with discussions focusing on how technology can streamline foodservice operations, from order accuracy to speed of service. **Richard Poye**, a guest to the meeting, chief operations officer at Food Trends Think Tank, and Convenience Foodservice Vision Group (CFVG) facilitator, emphasized the importance of demand and production planning in grab-and-go environments, advocating for linking POS data to ordering and production. Rovertown's Co-Founder and President **Jeffry Harrison** raised the issue of food waste, suggesting the use of app-based technology to offer targeted promotions for excess products, which not only reduces waste but also attracts customers with personalized offers.

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Streamlining the Food-to-Customer Pipeline

Mobile Ordering and Kiosks

Christopher Egan, chief information officer at United Dairy Farmers, highlighted their challenges with kiosk implementation, particularly for made-to-order scenarios where older customers often require assistance. He noted how even seemingly minor issues like sunlight glare on screens can significantly impact customer satisfaction, sometimes resulting in customers accidentally pulling cables from the wall when adjusting screens. In response, Raimato suggested several vendors offering adjustable kiosk solutions, while pragmatically adding that inexpensive replaceable cables often prove to be the simplest fix.

Expanding the conversation, Ridge shared his approach of strategically positioning kiosks in front of the kitchen, enabling kitchen staff to assist customers when

needed, complemented by clear signage guiding the ordering process. Grimes broadened the definition of kiosks to include tablets running online ordering platforms, presenting this as a cost-effective alternative to traditional kiosk placement. Additionally, **Luis Ackerman**, vice president of technology at The Spinx Company, and Harrison reflected on their successful collaboration on a mobile app ordering solution they had implemented several years earlier.

The Drive-Thru Debate

The discussion also covered drive-thrus in convenience retail, examining both customer preferences and new concepts. Collupy mentioned encountering mixed opinions about drive-thrus, with the research Watt presented showing that many consumers actively avoid

businesses that don't offer this option, while other industry operators remain divided on the issue. Ridge described how one of their store remodels incorporated a dedicated drive-thru pickup window specifically for mobile orders.

Delivery: Opportunity or Necessary Evil?

Delivery was described in the presentations as challenging, requiring careful attention to both speed and temperature maintenance. Alternative solutions like lockers and vending were suggested as innovative options. Many participants noted that third-party delivery services create numerous complications, with several members indicating that handling delivery in-house is generally more cost-effective. Carpenter

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specifically addressed the accounting and reconciliation difficulties that arise when using external delivery services. CXVG had a very thorough discussion about third-party delivery which was recounted in the Vision Report, [*CxVG Third-Party Delivery: A Double-Edged Sword?*](#) and is worth referencing for additional perspectives.

Grimes referenced Amazon lockers in 7-Eleven and shopping centers and proposed the potential of temperature-controlled lockers for food. **Roy Strasburger**, CEO of StrasGlobal, president of Compliance Safe, and Vision Group Network co-founder, highlighted how Repsol in Spain uses lockers for handling returns, which effectively drives customer traffic into their stores. Though absent from the meeting, CTVG member **Raymond Huff**, president of HJB Convenience Corp., has previously shared relevant experience with food pickup lockers in his convenience stores located in apartment buildings, but was not present to share his insights during this session.

Final Reflection

This CTVG meeting highlighted the multifaceted challenges and opportunities in the convenience foodservice landscape. The integration of technology to meet the moments of evolving consumer expectations, streamlined operations, and enhancing the brand experience was a central theme, requiring careful consideration of demographics, legacy systems, and strategic goals. Integration of technology remains a pain point and will continue to be so for the foreseeable future.



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Review

LIGHTNING ROUND

Ed Collupy invited updates or reflections on the December 2024 CTVG session which focused on cybersecurity. He contextualized the conversation by highlighting recent cybersecurity incidents affecting the foodservice industry, noting that “Krispy Kreme for their quarter ending December 29, 2024, reported a loss of \$22.4 million, partly due to a cyber-attack that disrupted operations during a critical sales period,” and that Grubhub “experienced a security breach affecting customer, driver and merchant data” that was “traced to unusual activity from a third-party service provider’s account.”

Vendor Management Initiatives

Christopher Egan reported implementing deeper vendor security reviews following the previous meeting. While his organization already had multi-factor authentication on vendor accounts, they “sat down with our key vendors since then just to have a more open dialogue” about security measures. When questioned about vendor receptiveness, Egan noted that “no one, I would say, reacted negatively. Some were certainly more embracing of it than others, but I can’t say that anyone resisted it.”

Similarly, **Rick Sales** shared insights on integrating information security reviews into organizational processes. He emphasized the importance of documentation and implementation, noting “it’s one thing to have a policy, it’s another thing to implement it.” Sales highlighted the value of these systematic reviews when responding to vendor security inquiries: “when a company like Chris’s company comes to us and says, what are you doing? We can show with documentation that this is our process.”

Employee Education Initiatives

Multiple participants at the December meeting emphasized employee training and Egan mentioned extending their educational focus to cybersecurity, stating they “have really focused on trying to do employee education of AI and just what information is going in there” using “those same channels like KnowBe4 to try and drive that employee education.”

It was clear that cybersecurity resiliency is important, acknowledging the ongoing nature of security efforts among the participants. This discussion demonstrated how industry leaders are implementing practical measures to address cybersecurity challenges.

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NOTABLE AND QUOTABLE

“ So if you’re planning drive-thrus, you’re thinking about how to do your physical plant, you’re thinking about your operations, think about things like separate lanes. Think about how you’re going to do your operational execution so that you can actually get the full advantage of things like that mobile order app when you’re using it for a drive-thru standpoint.

Cameron Watt, President and CEO, Intouch Insight

“ I think we’re getting ahead of things when we’ve talked about robotics, and I think in many cases we should focus in on how do we properly get the right ingredients in the store in the first place and then have the right levels to produce those types of things.

Richard Poye, CFVG Facilitator and Chief Operations Officer, Food Trends Think Tank

“ I would put your kiosk in front of the kitchen instead of by the registers because people will always go to the register and try to order. So at least this way, when you have people in the kitchen, they can help the people who are trying to order. Also have signage in front of them that’s prompting them and giving them some ideas that also contain the same pictures and things like that that you have on your kiosk so they can quickly get to the items. We’ve not had a lot of problems with people having to order or learning how to order, and I think that’s just because of the effort we put into the signage and the way we’ve created our menu items.

Bill Ridge, VP of Technology, Eastern Petroleum Corporation

“ The thing that I think is very interesting is immersive and experiential types of technologies where you can create the feel and an environment at home or in a c-store or a restaurant that you get immersed in, and then the connected ecosystems between them, even within a c-store and the convenience side and the gas.

Robert Grimes, Founder and CEO, International Food and Beverage Technology Association (IFBTA)

“ I think we, along with a lot of the industry, are looking at how do we add more foodservice capabilities, but I’m never going to be able to offer everything, especially when you start getting into things you need in the kitchen. So it’s all about being able to integrate with that. I will say that some of the capabilities that were brought up are available with major oil approved POS’s, but in some cases, they do require you to buy more pieces of the system from the same vendor. But I think even the others, I’ll call us more traditional providers in the industry, are starting to move towards more open platforms for some of that so we can bring both major oil access and some of these other capabilities.

Paul Kern, Product Leader, Invenco by GVR

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“ The question with technology when it comes to foodservice in our stores, the common denominator always seems to be that integration with the fuel POS.

Donnie Rhoads, Director of Business Development, The Convenience Group, LLC

“ You really do have to choose what you want to be and then build the tech around it.

Steve Evans, Chief Technology Officer, Haffner's Energy North Group

“ Until you've decided what customer journeys you want to have, what customer journeys you want to support, then it's very difficult to decide what your technology needs to be.

Cameron Watt, President and CEO, Intouch Insight

“ We're seeing a trend in a lot of retailers that sometimes make too much product in their grab-and-go, or they have product that's going to expire, whether it's milk in the coolers or other things. I think something we haven't really talked about in this conversation is food waste, and I think that's a huge issue and a huge opportunity that technology can fix. We're spoiling food all the time, and that's not good for our image and our brand, and it's not good in general.

So what we've done with our technology on the app side is made it where you can hyperlocal a store and do like, "Hey, we went crazy and made too many breakfast sandwiches. The next 20 people that come in, you get buy one, get one free," and you segment it to people that have bought breakfast sandwiches in the past, only in the geo radius of that area, and you're able to bring them back in.

Robert Grimes, Founder and CEO, International Food and Beverage Technology Association (IFBTA)

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VALUABLE RESOURCES

The quantity of materials on this topic would make for an insurmountable pile. To help you navigate through the masses, here are resources worthy of making your “must-read” list.



Ed Collupy,
CTVG Facilitator

It was like Michael Brown and Yizi Zhao of consulting firm Kearney were ‘In The Room’ with us for our most recent discussion on food service technology in the C-Store/Mobility industry. They were releasing, at the same time, their consumer and retail article on the Kearney website, [*How are convenience stores transforming food service into a competitive advantage and what can grocers learn from their success?*](#) while we were discussing how the industry continues to evolve the important food service category.

The continued acceptance by consumers that convenience stores are a growing option for food over a quick service restaurant that guest speaker Cameron Watt shared from Insight Intouch’s latest research, will result in continued year-over-year revenue growth according to analysis the Kearney team outlines, from \$52 billion this year to \$58 billion in four years.

Although CTVG member Sanjit Bajimaya commented, and echoed by others, “I have yet to find a complete food ordering and kitchen management solution that integrates with current Back Office solution and legacy POS,” the Kearney study points to technology being the “game changer” that “keeps customers coming back” to the C-Store. They point to “digital integrations” seen at CTVG member company Wawa, as well as at 7-Eleven. Rob Grimes, during his remarks, cautioned the group that “POS is not the center of the universe... trying to force C-Store/Fuel systems may limit the native integrations for food service...”

Just as in my concluding remarks, “stay vigilant to what has become a much wider category...throughout general retail as well.” Brown and Zhao highlight the need for the C-Store industry to continue to innovate to effectively compete with not just QSR’s but grocery stores as well.



Paul Kern,
Invenco by GVR

I came across this article in Culinary Coverage, [*The Future of Restaurants:*](#)

[*How Technology is Changing Foodservice.*](#) It really highlights where the restaurant industry is headed and we’re seeing many convenience retailers move this direction.

Restaurants use online ordering, delivery services, contactless payments, and personalization to improve how they interact with customers. Convenience retailers are doing much the same and embracing these advancements sets us up for growth and success in the future.



Myra Kressner,
Vision Group Network
Co-Founder

ICYMI from our discussion on drive

thrus, here’s a quick summary from TechSpot, [*Nvidia partnership to expand AI use in KFC, Pizza Hut, and Taco Bell restaurants.*](#)

Interestingly, TechSpot closed their article as follows: “Yum’s announcement, unsurprisingly, did not mention any potential impact the partnership and additional AI agents might have on human jobs, other than stating it would ‘assist and enhance the team member experience.’”

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Ed Collupy
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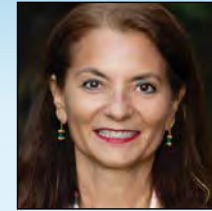
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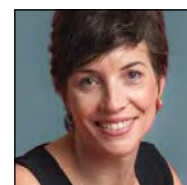
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CTVG Views

In The Room with CTVG

Presentation

IN THE ROOM WITH CTVG:

*Pivotal Moments for
Convenience Foodservice
Technology*



Convenience Technology Vision Group (CTVG) invites you to join us **In The Room** to experience our meeting on March 7, 2025. We are providing you with the entire conversation so that you can be “in the room” with us, rather than simply reading polished sound bites



CTVG Views

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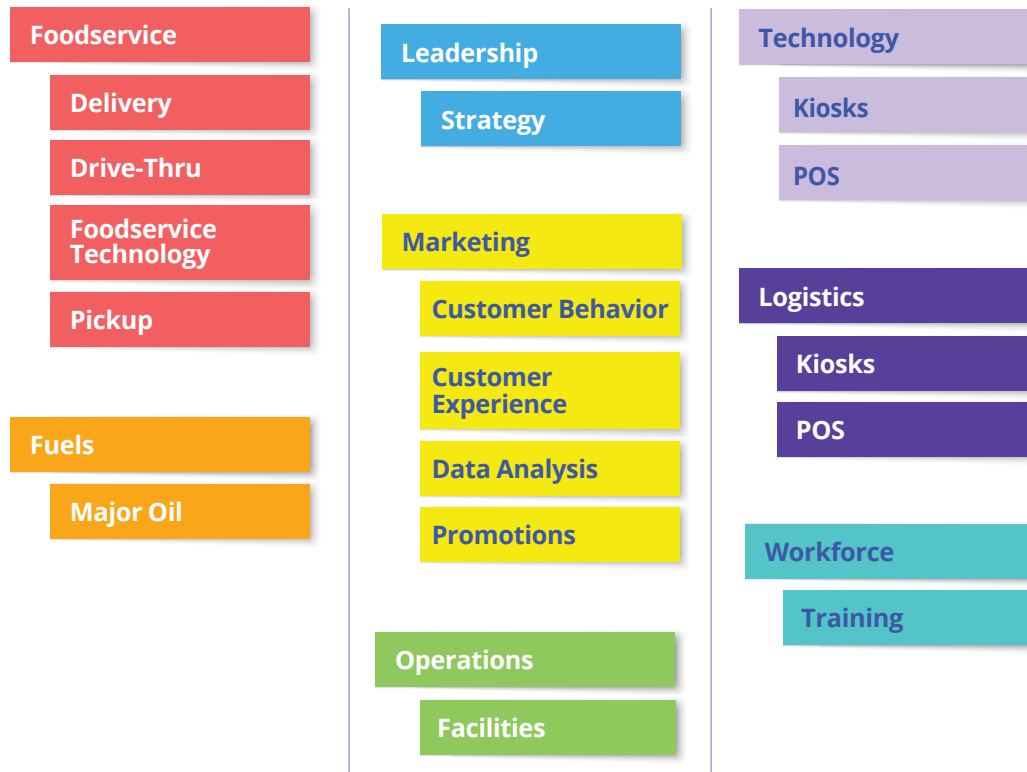
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Topic Reference Key

CTVG's mission is to increase the institutional knowledge of the retail industry by sharing ideas and perspectives. For your convenience, we have placed topic indicators throughout the dialogue. Below is a key to the list of topics.





Ed Collupy

Welcome, Introductions, Meeting Rules

Hello everybody. Ed Collupy here. It's great to be with you and thanks for joining us for our latest Convenience Technology Vision Group meeting. It was good seeing some of you at events back in January, and to be honest, for me it was nice to have relatively calm business demands in February. Still, over the last few months I've been hearing more and more discussion among convenience mobility leaders about the continued challenges with technology for the continued growing foodservice category. Just among the Vision Group itself, we've had the kickoff of the [Convenience Foodservice Vision Group \(CFVG\)](#) and the [Conexxus Vision Group \(CxVG\)](#), we had an in-depth discussion on third-party delivery during their meeting at the Conexxus Annual Conference that I was fortunate enough to be able to attend.

Retailers are looking, as reported in CFVG's Vision Report, to overcome blind spots in the customer experience, which we'll hear more about what consumers are looking for from research that Cameron Watt with Intouch Insight will take us through today. There were many foodservice technology solutions at the NRF (National Retail Foundation) Big Show back in January that our other guest speaker, Rob Grimes, curated through his work with the International Food and Beverage Technology Association (IFBTA), which he'll expand upon during his remarks during our meeting today. We'll come back to those guys in just a bit. But at the Conexxus meeting, Gray Taylor, the executive director, highlighted for the CxVG members one of the Conexxus roadmap's elements, which was on-the-go commerce, when he brought up the future scenario of voice-activated ordering through the car dashboard. Now that I've whet your appetite, we'll come back to foodservice in just a while.

And most importantly, we're going to get to hear from you, our members, today. The insights that come from our Vision Group meeting that you share with each other become important points for peers and colleagues across the industry to learn from and consider.

This screenshot [Publication and Antitrust Statement shown on screen] will serve as a reminder of the antitrust statement and publication acknowledgement that CTVG members and our guests have signed. This afternoon's discussion is being recorded, so please use your camera and keep it on as much as possible and remember to mute yourself unless you are speaking so we are not disturbed by what may be going on around you. And also, be open to sharing and participate as you have been in prior meetings with candid and diverse points of view. As a reminder, on that note, should you want to make an off-the-record comment, just let us know that what you're going to say or what you have said is off the record.

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And as happens with all your busy schedules, some of our fellow members are not able to make it today, but they did ask me to extend a greeting and that they look forward to reading the next Vision Report.

It's always great to welcome a new CTVG member, and today I'm pleased to introduce Luis Ackerman, who's the vice president of technology at Spinx. He is joining us as his colleague Cheryl Szczesniak passes the baton to him to become a member of CTVG. So welcome Luis, and can you just take a minute to introduce yourself and your role at Greenville, South Carolina based Spinx?



Luis Ackerman

Ed, I think you already did that for me, but just obviously you guys knew Cheryl. I've been working with Cheryl for almost 20 years now. I was part of her vendor team. I was a managed services provider for Spinx for 12 years prior to being hired on to take over the vice president of technology role at Spinx. I'm excited to be part of the group. I've heard great things. I know several folks here and those of you that I don't know, I look forward to just getting to know you guys a little bit better and joining the conversation. Appreciate it. Thanks for having me.

Ed Collupy

Excellent. Thanks Luis. And it's great to have you on board with us and I know the group is going to benefit from your experiences that you'll share with them.



Roy Strasburger

Roy Strasburger, can you give our members an update on some exciting things that are happening with the Vision Group?

Absolutely. Thank you Ed, and welcome everyone. On behalf of Eva Strasburger and Myra Kressner and myself, I want to thank you for joining us today and continuing the interesting discussion with CTVG.

Vision Group Network continues to grow and we have a lot of exciting things going on. One of the things that Ed mentioned earlier is that we had our very first hybrid Vision Group meeting in conjunction with the Conexxus meeting. And by hybrid what I mean is that it was a combination of people being together in a room and also online. It was the very first Vision Group meeting we have had where we had people actually sitting at the table where we could see each other and talk to each other afterwards. So that was very exciting, and we learned some great lessons. Overall, it was a very, very good experience.

The second thing is that we had our very first Global Convenience Vision Group meeting yesterday, and that is being facilitated by a gentleman by the name of Christian Warning who's based out of Germany. We had representatives from Europe, South Africa, Australia, South America, and the United States during our presentation yesterday, although it was a little bit difficult for some folks time zone wise. Here in Texas we started at 8:00 in the morning. We had one of our

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members in Australia where it was 1:00 in the morning for her, but it was a very, very good meeting and great kickoff of what I think is going to be a fascinating group. So that Vision Report should be out in about four weeks or so. We look forward to you having a chance to see that.

The other Vision Group that we have started this year is the Convenience Foodservice Vision Group, which brings together a lot of convenience foodservice experts from around the country, and that is facilitated by Richard Poye, chief operations officer at the Food Trends Think Tank, who is online with us today. So Richard, if you'd give us a wave and say hello. We're really pleased to have Richard as our facilitator for that group. And since we're talking foodservice today, we invited him to join us. A lot of exciting things going on and we would not continue to grow and expand what we're doing if it weren't for your help and your participation, because what we're finding is that there's a real interest in getting information from people who know what they're talking about, to people who are trying to do things in their own business, so thank you very much for helping us with that. Ed?

Lightning Round

Ed Collupy

Thanks Roy. And welcome Richard. Good to see you again. As we get underway, I'd ask you to please remember to use the raise hand icon as often as possible for conversation, and I'll work to call on each of you in the order that those hands go up. If you find yourself in a back-and-forth discussion, please just keep that conversation flow going. And if you need to step away, you can either write a short note in the chat or just leave and return when you're able.

At the end of our 2024 CTVG meeting, which focused on the evolving trends and pitfalls of cybersecurity, Daniel Martin of Verinext and Todd McClelland from the Sterlington Law Firm led us through, among other topics, the need for human risk management and vendor and third-party risks. And some of you outlined some serious concerns. Donnie Rhoads, you described your "scorched earth" policy. Joining in with you on that was Jeff Carpenter and Jason Collins who pointed to the ongoing need for employee training in the area of cybersecurity. And Chris Egan, you were very honest with us in saying from the discussion you learned that you should go deeper in your review of vendor actions around cybersecurity. And then Abhi Patel, who can't be with us today, mentioned safeguarding deep down into fourth and fifth-party providers.

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Christopher Egan

Strategy

Ed Collupy

Christopher Egan

Ed Collupy



Rick Sales

Strategy

Since we're talking about foodservice today, here's a couple of cyber incidents that were recently reported. Krispy Kreme for their quarter ending December 29, 2024, reported a loss of \$22.4 million, partly due to a cyberattack that disrupted operations during a critical sales period. Additionally, Grubhub just last month said that they experienced a security breach affecting customer, driver and merchant data. In that case, the breach was traced to unusual activity from a third-party service provider's account.

Thinking about that, I'd like to invite you to give us a little bit of insight for anyone who joined us the last time to share with us over the next couple minutes during our Lightning Round, what you learned from our cybersecurity discussion and any actions you've taken recently in what I know is an ongoing challenge and focus for each and every one of you. Chris, I mentioned you in my remark there, any further thought or have you taken any action as a result of that discussion?

We already had MFA (multi-factor authentication) on our vendor accounts. I think that was one thing that was mentioned, but we have sat down with our key vendors since then just to have a more open dialogue. What are they doing? Make sure how are they going to alert us? What are they monitoring so that we can at least identify the gaps, maybe not solve them all, but make sure that we work on our plan to address.

How did they react to that ask in the discussion?

No one I would say reacted negatively. Some were certainly more embracing of it than others, but I can't say that anyone resisted it.

Very good. Anybody else with thoughts on cybersecurity from our last discussion. Or something new that's occurred? Rick?

Great. Good to see you. I was thinking about the session that we had last time recently, because in the first quarter we do a number of reviews, and we do the financial review leading into the taxes and we have an employee meeting. I talked in the meeting before about process and we had inserted our InfoSec (Information Security) review in there as part of the process.

I was thinking about the meeting and looking at the process and being pleased that we did that because when we talked to other employees, they had forgotten that we do InfoSec review and it was good to go over the 20 different things that we had identified were important and ask IT and DevOps about when is the penetration test scheduled and the list of things that we have to do, so when a company like Chris's company comes to us and says, what are you doing? We can show

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with documentation that this is our process and I can also make sure that all my people follow the process. Because it's one thing to have a policy, it's another thing to implement it. I was thinking about that report because it was happening, the reality of the InfoSec review was happening here right now.

Ed Collupy

Very good, thank you. Anybody else taken some action or discovered something new? I know there was chat in our discussion about KnowBe4 as a tool for employee training. Has anyone looked at anything else? Yes, Chris.

Christopher Egan

Just one thing I would add that's somewhat related is, we have really focused on trying to do employee education of AI and just what information is going in there. I know that's not necessarily directly cyber, but we're using some of those same channels like KnowBe4 to try and drive that employee education.

Ed Collupy

Excellent. Very good.

All right, well thank you all and as I highlighted in the Valuable Read section of our most recent Vision Report, cybersecurity resiliency is paramount. I think we all know that that resiliency is what you folks are working towards and working on.

Now let's dig into our main topic for today, foodservice technology. We've brought together two voices who know foodservice well, and both will bring food for thought for our discussion today. Cameron Watt has been leading Intouch Insight as their president and CEO for over a decade, helping companies across North America including four of the top 10 QSR chains, six of the top 10 gas and convenience chains, and one of the top three global technology companies, with their consumer experience, mystery shopping, consumer surveys, and operational and compliance audit solutions. Cameron's going to share some early insights from brand new 2025 consumer research they've conducted that will help us understand how consumer expectations have evolved over the past few years and what that means for convenience retailers.

I met Rob Grimes during my first meeting with the original Vision Group Network's forum, The Vision Group (TVG) and quickly learned of his willingness to share his experiences in foodservice and tech. Rob is the founder and CEO of the International Food and Beverage Technology Association and is also the host of TechBytes podcast. IFBTA is a non-profit trade association that promotes the use of technology within the global food and beverage industries. As I mentioned earlier, Rob brought together a well-rounded number of foodservice focused technology solutions at the NRF show, including pizza and french fry making robots from Middleby, Toast's new bodega focused retail offering, and a smart dispensing system from Kraft-Heinz that mixes sauces like the Coca-Cola Freestyle Dispenser mixes a fountain drink.

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Data Analysis



Cameron Watt



Data Analysis

I often hear that the c-store mobility industry lags the QSR hospitality sector when it comes to technology. Interesting though, just in the last couple of days I read a summary of some recent research by SpotOn Transact's 2025 Restaurant Business Report where the cries, really across both the restaurant and convenience sectors, are similar -- especially for smaller chains and independents.

What they found was that folks were saying we have limited access to real-time financial data and insights in order to make informed decisions. Further, they said there were inefficient tracking capabilities in the technologies that they have. The survey reported only 15% of restaurant operators can easily access key cost inputs like food and labor costs as a percentage of sales, and that they were having difficulty forecasting revenue.

And then last, a number of them talked about their outdated, and to me that includes non-integrated systems that become a manual and time-consuming burden. So with that as a backdrop, let's listen to Cameron and Rob and hear their take on the foodservice industry and where c-stores fit into the mix. So, Cameron, can you take it away?

The Presentation

All right, thanks for having this talk today. I will mention that I am not the technology guy at my company. We have lots of those, so I'm going to be talking today about not necessarily the specific technology. Rob will get a little more into some of the technology side of it. I'm going to talk a little bit about the operational and consumer feedback parts of it.

The reality is that technology isn't used for technology's sake itself. Technology is used so that we can actually get business, so we can make people happy. So, I'm going to focus on customer interaction points. I'm also going to look at QSR restaurant comparisons as well as convenience. There's quite a bit of data, so I'll go relatively quickly through it, but you will have the opportunity to ask questions at the end.

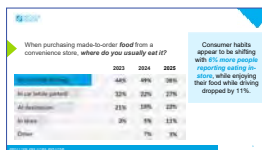
Now, why are we even having a foodservice and technology discussion? Well, it's important. I'm not going to read every slide, by the way. You guys can read slides while I talk. It'll give you all something to do instead of looking at me.

Forty-five percent, so less than half, of the people in 2022, thought that a convenience store was a legitimate alternative to a restaurant to eat. Today it's 72%. It's almost three quarters. So foodservice is absolutely becoming more and more important, which of course has been a very intentional push by the industry, but it's working.

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Customer Behavior



Delivery

Now, where do people eat the food they buy at convenience stores? Well, the short answer is in their car. Why does that matter? Well, from a technology standpoint, from a planning standpoint, what's the packaging we're using? Are these things that fit inside cup holders? Are they easy to eat on the passenger seat? You also notice that there's a lot of growth in people eating in the store, and that's partly because the ability to eat in the store is starting to happen as people put in seating and put in options. And the significant growth we're seeing there would indicate that if you put in the ability for somebody to eat in the store, people are taking advantage of that. So people are absolutely looking for that convenience that's in the name and you can see what they're doing there.

But customer journeys are changing. Besides the traditional things, we've got first-party delivery, third-party delivery, pick out and pick up in store, mobile order, pick up in the store after you mobile ordered, and order fresh in the store and then carry it out, or order it with a cashier, order it through a kiosk order over the web, or pick up through an unmanned box in the parking lot. There's a lot of areas there. So we're going to dig into a little bit of that and how it's been working, what people are feeling about it.

We're going to start with third-party delivery. C-stores, frankly, are slightly faster than restaurants, but other than that we're not faring as well. And keep in mind that this third-party delivery study was Uber and DoorDash and Grubhub. It was apples to apples, we did over 600 mystery shops and it was equal between the c-store space and the restaurant space. So this is an apples to apples for everything except the operations that came out of the restaurant or came out of the c-store. You can see that we're not faring as well on most metrics except for speed.

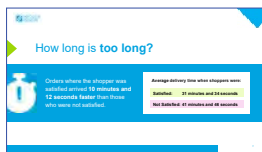
I want to point out customization and order accuracy. Customization is actually not allowed most of the time in the c-store, but order accuracy is still lower. Usually that doesn't happen because when you don't customize, you've got standardized orders, accuracy should be higher. That points to other issues in the operations and the technology that you're using in terms of tracking and what we're doing.

If you look at just the restaurant side of the customization allowance, you look at burgers, chicken and sandwiches, which are three of the things we tend to sell as well, they were at 100%, 96%, 93% of the time you could customize. And their lowest food category for customization in restaurants was 89%, and that was in the Asian category. We're at 45%. So there is some room there to go versus the restaurants as it relates to the operations side to support a third-party delivery.

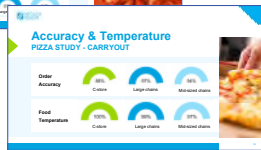
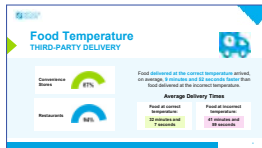
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Customer Experience



Kiosks

Now, while we're talking delivery, let's talk about length...time. I was in pizza back in the eighties and the nineties, which is why I don't have any hair. I could tell you that back then it was 30 minutes or free came out, right? And driver safety was one of the big issues we focused on. Today the expectations have been adjusted. People aren't expecting it in less than 30 minutes necessarily, they're not expecting a deal if they don't get it there, but they are expecting it in a relatively reasonable period of time because there is such a thing as too long. A little over 30 minutes, people are satisfied. They're fine. You get over 40 minutes and people are unhappy. So just know that there is a time limit on that.

From a temperature standpoint, convenience stores, we were faster, but we arrived colder. So if you think about that, how does that happen? Well, that can only happen in a few scenarios. Either the food is sitting too long inside the store before it goes out, we don't have the right technology in the store to keep that food warm before it goes out, or the packaging that we're using isn't as good as the restaurants are using to keep that warm when it's in transit. Because again, the delivery people were the same. So their technology and what they used was the same. So we need to look at the innovations that we have around things like packaging and keeping things warm in our processes and systems.

Now, pizza, a specific part of the food category. It's got its own category and frankly, convenience stores are starting to get into this business. Now, full disclosure, when this pizza study that we've just released, we did only have two large c-store players that we looked at. It was mostly the pizza segment itself that we looked at, but even with that, it does show there was a gap in the speed from a satisfaction standpoint. One thing I'll tell you from looking at the two c-stores we did look at, and looking at the industry, if you're thinking about pizza systems and technology, think about speed of service because they are tied together. The pizza study also highlighted that accuracy issue that we have versus restaurants as well. We have a way to go in terms of our in-store operations around food versus our foodservice competitors as it relates to that accuracy side of things.

Turn our attention now to kiosks because kiosks are getting to be obviously more and more popular. It's interesting, it takes longer to order at a kiosk, but accuracy is improved. And that makes sense because if you're entering the data yourself and you're verifying it before you press send, then you expect it to be more accurate getting into the kitchen from the get-go. You don't have anybody in between you and that kitchen doing translation. It also makes sense it's slower because the person who's doing 1,000 orders a day is going to be faster than the person who's doing one on that technology. But despite the fact that it's slower, people seem to like it and I think it's because they have control over that order process. And I think you see that in the accuracy.

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Satisfaction with the Level of Service:

	Order Accuracy	Price Accuracy	Service Accuracy
Order Accuracy	95%	95%	95%
Price Accuracy	95%	95%	95%
Service Accuracy	95%	95%	95%

The Devil's in the Details

Insights from the field: What a shopper had to say:
 "The kiosks are located in the front of the store, and the staff makes it super difficult to see the kiosk screens."

Mobile Order for Drive-Thru Pickup:

PROS: Order accuracy was 11% higher at the restaurant location.
 By having the ordering process out of the store, the staff can focus on the customer and the food. It also means the customer can be in the line for less time and the staff can be in the line for less time.

CONS: Kiosk orders were ready after the projected time.

Drive-Thru

Physical spaces can pose challenges

Insights from the field: What a shopper had to say:
 "My order was ready on time, but because I was in line behind someone who had just placed an order at the speaker, I was unable to reach the window until six minutes past the projected time."

Facilities

Satisfaction with the Level of Service:

	Order Accuracy	Price Accuracy	Service Accuracy
Order Accuracy	95%	95%	95%
Price Accuracy	95%	95%	95%
Service Accuracy	95%	95%	95%

Overall satisfaction was 18% higher for the business when digital ordering was implemented compared to the legacy experience.

Technology

And if you take a look, you can see that in their satisfaction scores as well. Across the board, people were happier or more satisfied with the experience of ordering when they used a kiosk to place their order, which I think is obviously a pretty good sign. Now, don't forget when you're implementing any kind of technology, especially like this, there's details, like screen glare. So when you're picking a vendor, when you're looking at a technology, you need to look at what type of screen technology's in use. Does it tilt? Does it move? Does it slant? Where are you going to place it? It's not just as simple as throwing up a screen anywhere in your building, but if you do it right, people like it.

People love drive-thrus. Let's take a look at some of that tech. The newest thing is mobile order with a drive-thru pickup. Again, the accuracy went up. And the reason accuracy went up I think is the same reason, the customer controlled the process and they put everything in and you cut out the middle man. It was faster than the standard drive-thru in general terms, but promised times aren't being met. So if you think about it, you're telling me, "Oh yeah, that your food will be ready in six minutes." And I get there in six minutes and don't get my food for eight minutes. So why is that? Well, some of the issue is probably a physical limitation of the drive-thru itself. The comment you're reading right now is from a standard Y format drive-thru lane, and they got behind someone who didn't order ahead, so they didn't have the same speed. If you think about that, if 80% of your cars are ordering from the speaker and 20% have done it on the mobile order, the mobile order is still in the same line.

So if you're planning drive-thrus, you're thinking about how to do your physical plant, you're thinking about your operations, think about things like separate lanes. Think about how you're going to do your operational execution so that you can actually get the full advantage of things like that mobile order app when you're using it for a drive-thru standpoint.

And from a satisfaction standpoint, this was really interesting as it relates to the drive-thru with the app, because people did not score it well on order or pickup experiences, but overall they were more satisfied. So, what does that say? Is that impossible? Absolutely not. The truth is that overall satisfaction with an experience is not any individual thing necessarily. They all can weigh into it.

In this case, I think that there's a few things, one of which is that there's this new technology they got to use. So they got to place their own order, they did it on their phone, they didn't have to interact at all with speakers and things, and they went in and I think just the whole newness of it probably had a halo effect on the technology and people felt satisfied with the experience, even though they would've preferred some things, maybe done a little bit better along the way.

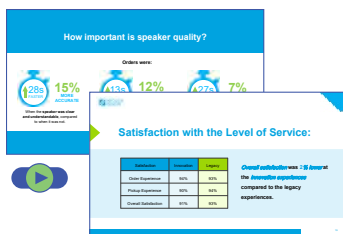
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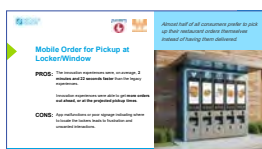
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Drive-Thru



Customer Experience



Pickup

Now, staying with drive-thrus for a second, let's take a second and just take a look at some of the latest and greatest that exist out there as it relates to drive-thrus and the restaurant industry. Wendy's has a prototype which features a dedicated pickup window, parking for delivery drivers, so that they don't have that pressure in the drive-thru lane, they have a galley kitchen runs front to back. The Jack in the Box has a prototype which is designed for digital ordering and it features a double wide drive-thru. It has dual assembly kitchens and a dedicated pickup window for both mobile and third-party delivery orders. And the Checkers and Rally restaurants that we went and looked at were ahead of the curve in terms of general adopting cutting edge drive-thru tech. Their locations feature double drive-thrus, modular buildings, closed kitchens, and AI technology at the drive-thru.

One of the things that came out of these brand new, spunky, funky new concepts was that the actual order itself was great in terms of the speaker technology and the quality and the ability to communicate, but the new concepts, and I don't know if it's because they're new, they're learning, they're still getting it, but they took longer. They actually took longer. What does that mean?

Well, first of all, let's pause on speakers just for a really quick minute. Those of you that are looking at drive-thru technology, for example, do you care about speaker quality? Well, our research says you should because it matters to both speed and accuracy. It's not like having a poor speaker is not going to matter. People care, speed, accuracy, you want to make sure that people can understand what's going on. So that's a very important part of the tech.

At the same time, speed of service is important because you can see here that the overall satisfaction rating for these brand new innovative restaurants with really cool designs and supposed to be better, stronger, faster, sexier, they did not get as high a satisfaction rating as the legacy units did. And I think that a lot of that comes down to the fact that they were just simply longer. And it's drive-thru. People want speed. It's just that simple.

The last new piece of tech, I'm just going to give you some data on here before we move along, is around the concept of picking it up from a locker or a unique area where you do not need to interact with anyone. It seems to solve that problem that we have with the mobile order and the drive-thru where you're stuck in line behind another vehicle or you're stuck behind somebody who's not doing it. So, because it seems to solve for some of those operational issues, the times are absolutely faster.

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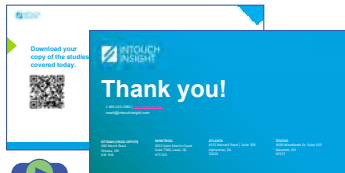
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Satisfaction with the Level of Service:

	Before	After
Order Accuracy	85%	95%
Order Timeliness	85%	95%
Order Quantity	85%	95%

Customers at the Innovation Center were more satisfied with the process, resulting in a higher level of satisfaction compared to Legacy Experiences.

Customer Experience



Rob Grimes



But the devil is in the details. You need to make sure that people understand where to go. You need to make sure it's convenient, that it's obvious, that it's not hard to figure out. Sure, over time you can train customers, but you'll get them earlier and you'll keep more of them longer if you make it easy right out of the gate.

So this is absolutely, though, something to be looking at, because people had a much higher satisfaction level when they could just pick up their own order without wait time, no interaction. They got the best of all those worlds. They got to place the order themselves, they got the order accuracy, and they didn't have to get in line behind other vehicles. So it was a very well-received experience if you look at those scores there.

And with that, I will just mention that we have a lot more data, obviously. I went through data from a bunch of different studies there that we do and we're doing, and there's lots of that available through our website. The CTVG of course has access to this. I think you'll all have access to this presentation afterwards, so feel free to go and download and take a look at anything you want. And with that, I am just going to say thank you. I believe we're going to have some time for Q&A and stuff at the end. And I will turn it over right now to Rob to continue on.

All right. So as Cameron mentioned, I'm with the Food and Beverage Technology Association. I want to go ahead and just share with you a quick overview of that because we're actually a resource, as you'll see in a moment. And I'm really honored to be on this. But let me just start out with, everybody eats. And I heard Cameron say early on in this that he's not necessarily the expert in this area. I would tell you that all of you are the experts in this area because, at the end of the day, the consumer is the expert and everybody eats.

The IFBTA really does a number of different things. It falls into different quadrants for us. But we have a community. We support the community. We have chapters and we have neighborhoods, and we do partnerships, which I'll talk about in a little bit. We have resources that are available to all IFBTA members and any operator or anyone who participates. Even the suppliers can just become members because we support all the industry associations and events and trade shows. Anybody who went to NRF, they have a membership, or if they go to NACS, so that would be all of you as well as just participating in here.

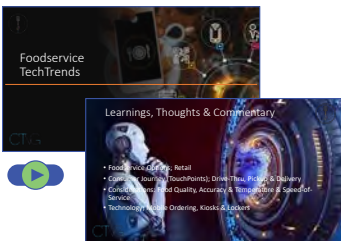
But that opens up the resources, including things like our exchange, which is a listing. We don't take advertising; we don't take sponsorships. Everybody's a member and, in our view, everybody's an equal member with a seat at the table, whether they're a supplier or an operator, because it's about education and networking and the members.

Editor's note: For membership information for IFBTA go to: ifbta.org/membership

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Foodservice

And we've been called food and beverage connectors in there throughout the industry, and this is why: I think sometimes people don't really think about where food and beverage fall. So, we actually are very focused on all three of these industries with lodging, foodservice, and retail. And you can just see some of the things here. But at the top of the list, and I didn't create this list for this call, is c-store.

And that, as we'll get into when we talk about the convenience industry, is where we think some of the biggest opportunities are between the integration of food and beverage and retail. But you can see it really cuts across. And by the way, I'm pretty sure that if we took this chart and we said, "Let's just go ahead and give this over to Connexus or NACS," we could sit here and have the same exact conversation and say, "Well, where does convenience reside?" And micro markets are convenience, and they're in hotels, and certainly in airports. So I'm pretty sure that this chart would equally go the other way as well, but food and beverage is clearly within all of them.

I'm sure you've all seen charts like this before. I have ones for retail, ones for hotels. But there are these charts that really show what the technology landscape is. And there are so many different providers. In the past... when I say, "In the past," we might say 10, 15 years ago, the main conversation we'd be having is the word integration. Today we don't necessarily think about it that way because things tend to be a little bit more plug and play. But there are so many different providers just in the foodservice industry, but many of the providers on this chart, or any of the charts, are actually crossover ones that have applications and solutions across the board.

So I want to go ahead and talk about the foodservice tech trends, which is really why we're here. So I'm going to start with that and then specifically talk about how those tech trends are things that are focused on the convenience industry.

But to start that, I promised that I was going to listen and provide color commentary, which is going to be very difficult, Ed, later on for me to raise my hand. People know that. I will raise my hand if I want to contribute later on, but I like to listen to what people are talking about. But I more like to also take a look and see what's out in the industry by visiting, experiencing, and then perhaps provide a different perspective or commentary.

So Cameron covered a number of different places today, and the foodservice options in retail are just tremendous. I believe very firmly, and as Ed pointed out through our partnership with the National Retail Federation, that c-store is the number one place where foodservice and retail actually come together, but we need to define what foodservice is. So in my definition I'd probably be talking about freshly prepared foods that can be delivered or they can be consumed on

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site, but they're fully consumable versus a deli in a grocery store, you're probably taking it home. So anywhere that does that is there.

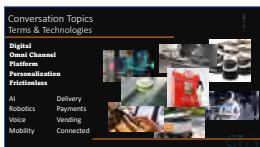
I agree 100%, the touch points in the journey. The drive-thru, the pickup, the delivery, the lockers that were just talked about, those are very key areas that are the touch points, if you will. But they're all there, and they're now actually, all of them, expanding. There's a lot of headaches in foodservice. You'll have independent operators, regional differences, there's not so much in the other.

But also, foodservice are really factories. They are production plants where things are done. And the pizza segment above all. I did hear the piece about pizza. When I traditionally think about convenience stores I think about pizza. I might think about the Subway or the sandwich shops, but I'm really not thinking too much about too many other things. Chicken: I do have to throw chicken and beef jerky in there, but you're not producing beef jerky on site. But I do enjoy going to NACS for that.

I want to go ahead and also focus on the accuracy, quality, temperature, and speed of service. Speed of service has been the number one thing in the foodservice industry for a number of years, especially in drive-thrus. And in drive-thrus, because the menus get bigger and bigger, and people want more. Now what COVID did for the foodservice industry is reduce the number of menu items that might be done, but I think that that's going to change as well because people want to do all kinds of different things.

Here are the conversation topics. I have conversations all the time. And by the way, you should know, I should have probably said this at the beginning, I'm a restaurant manager who happens to be in technology. But I've come from operations, and I think like an operator, not technology. And I don't believe that technology, [is just something] you just go out and just put it in. It's an enabler of many things. Well, when I have conversations today in foodservice, no matter where it is, there are certain words that come up which confuse everybody. I'm sure if we did a poll on this call there'd be different definitions for omni-channel or digital or platform. The vendors always like to use platform in there.

But I will tell you the last two are what I think the buzzwords of 2025 are. It's not AI. It's going to be personalization and frictionless. And I've recorded two podcasts in the last two days. One with somebody from Papa John's and the other from Five Guys. Actually, I did three because I did Sodexo as well, who has c-stores. And frictionless and personalization are those words that come up like 10 times.



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AI might come up, but it might take you 10 minutes in a 30-minute conversation now for it to come up because the assumption is it's there. The key technologies are robotics and voice, especially in the drive-thru. But if you're Papa John's you're looking at voice for order taking and customer response. Mobility of course, whether it's in a car or whether it's a handheld. Delivery. The delivery technologies really came out of the pizza industry. I had this long conversation. 20 years they had to develop them on their own. Now they're lagging behind and learning from the retail industry and e-commerce all the technology in there. Payments for sure, which are always the most confusing thing, probably also for you, because the consumer demands where they pay and how they pay. And so all these new things come up all the time, and now you have got to take that payment.

Vending is a hot area. It is a hot area in restaurants. I call it restaurant in a box, especially when you have things like RoboBurger or pizza being made fresh prepared. Not the pizza bot, but actually you go into a Hyatt hotel and you find a pizza machine that, at 3:00 in the morning you get a freshly made pizza. That is an opportunity also for the convenience industry. And everything is connected because we now see a lot of stores connected. And I'm not talking about internet of things here, I'm talking about inside the four walls. Hotels have been doing it for years. Now restaurants are. That has a lot to do with smart equipment, which we'll talk about.

So when we have our discussion later on or outside of this, I always look to what I call the peripheral industries or the influencers. At the highest level, the influencers are the consumer industry, so CES (Consumer Electronics Show), and then military, education, and healthcare because they have unlimited budgets to try new technologies out. And a lot of technologies' thought leaders come in different places and then they go to one of these industries.

But more importantly, after they become viable options, because I don't necessarily believe that pizza has to develop its own anymore today, we have a family. And that family is the food industry, the travel industry, the lodging industry, and retail. And we share technologies. It amazes me how many times these technologies are in silos. And I can go to Connexus and I can go to NACS, and I will see technologies that are there and I'm like, "You know that already exists, right?" Or the integration exists. And trying even to get standards' bodies like Connexus or RTN (Restaurant Technology Network) in the restaurant industry, or HTNG (Hospitality Technology Next Generation) to just share data. These interfaces are very similar between them. And of course, we used to have ARTS (Association for Retail Technology Standards) in the retail industry. But you always look at the family because sometimes you find great stuff within some other member of the



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And what answer did I get? Better service data. Better, long life. This, that, and the other thing. What I didn't get was anybody who provided a solution to get all that data together and actually say, "Did you notice that the shake machine is doing X number of shakes? The time between the shakes and the ordering is this. Let's look at the camera displays for where we put things like planograms, planograms for people and equipment." Nobody has tied that together yet. But what they have done is they've tied together the technology. So those are just some things. We could have a long discussion on all kinds of shows that I attend. I went to Expo West this week, which is the natural product show. I think Karin was there as well. I didn't get to see her. But you're talking about new types of technology and food itself.

All right, so very specifically, and then I'll wrap this up and we'll go into the discussion. So, c-store and foodservice. I think Sheetz is on here. We have a picture within a Sheetz store.

But in reality, what enables it for you? What I think enables it for you, there's a few things. Generative AI, we don't really need to talk about AI, but that makes it easier for you to operate, do recipes, manage, and do things like that. The robotics I think is rather interesting. You almost never see it anymore in front of the house. They've almost disappeared at every trade show in that. But in the back of the house, to do production, whether it's a fry machine in limited space or whether it's the pizza bot, which is also limited space, in order to be able to prepare but not necessarily have to train, and to be able to do it more hours than you're going to have to staff. Because most of the stores that I stop at, at a certain point, they're closed in the foodservice area and all you have is what you can grab and go.

Electrification is very interesting to me. It is interesting to me because obviously there are certain counties and states and things that are not allowing gas anymore for equipment, but I'll tell you why it's important for you. I don't need to really tell you why electrification's important for you, but we do need to take a look at EV, which means people are going to have more time. That's why it may be important for you. What else can you do? However, the real reason I bring this one up is because you don't have to install gas lines anymore to go ahead and put in fresh food cooking, which means that that now just opened up the whole foodservice market to you without having to redo what you're doing and put in the gas lines.

And sous vide cooking, which has been around for like 50 years, even though it [was more in the] last two years, actually it's freshly made food. So I'm very careful to say, "fresh food," versus, "freshly made." Most customers don't know the difference. If you don't know the difference of it, go to a Taffer's Tavern, Jon Taffer, the guy on Bar Rescue. 80% of the food in a Taffer's Tavern is sous vide. The remainder is either dairy products or it's produce.

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Okay, so these are the technologies that you can leverage. Because when I walk around NACS I do not see much in the way of foodservice technology. I see people jury-rigging what's being used in retail stores or at the gas pumps to be able to do food and beverage. So POS is the backbone. The back office is different. It is always different in retail versus foodservice. Drive-thru technology is driven by the foodservice industry for sure. Multi-lane drive-thru delivering the drive-thru, pickup and drive-thru.

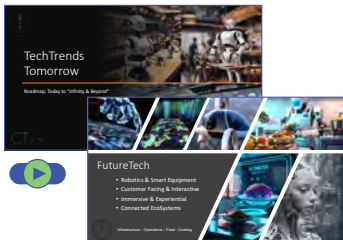
Online ordering obviously came from the restaurant industry as well, even though you have huge e-commerce in there. There's a lot more by the way, in data analytics, that comes from retail than foodservice. Delivery came out of there. But what I find fascinating is who was the biggest...the only delivery service in the Foodservice Zone. It wasn't Grubhub, DoorDash, or Uber Eats. It was Instacart. I thought that was fascinating to me, that a grocery company is actually now in foodservice. And that's where we're going to see that ahead.

Catering is something that you can do. And catering is boxed things like Panera and stuff. I don't mean custom catering. Loyalty, there's a lot to be learned. And then the integration in the standards I already just mentioned. There's a lot that you can steal from there as you do it or you do your partnerships.

Just really quickly, a couple of the tech trends for tomorrow when I look about future tech: robotics and smart equipment for sure, but total robotics, where it's actually able to do functions without having to be told what to do. And we're starting to get there. CES this year had that. The customer-facing and interactive technologies, where the customers are not worried about talking to a computer even at the drive-thru – go look at Bojangles and what they're doing right now in their drive-thru and their voice.

And I know Shaquille O'Neal with Big Chicken – he's putting himself on the things. You can start to feel that you're actually talking to the person. The thing that I think is very interesting is immersive and experiential types of technologies where you can create the feel and an environment at home or in a c-store or a restaurant that you get immersed in. And then the connected ecosystems between them, even within a c-store and the convenience side and the gas.

If you want more information you can certainly reach out to me. You are all welcome. And you'll get this afterwards anyway, so scan the code and become a member. We have a member of the c-store who's so important to us. A member of my board is the CIO of Murphy Oil, but he used to be the CIO at Focus Brands and Jack in the Box, and he came from hotels. So I just would end and just say it's very important. And I appreciate being invited to the conversation.



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The Discussion

Ed Collupy

Drive-Thru

Thank you, Rob, and thank you, Cameron. Well done. Just a couple observations: it was great to see the increased consumer confidence in convenience stores being an option for food over quick service restaurants, and even better were the insights, to me, that Cameron shared that provide areas where the industry should focus on in order to continue to move the needle on that confidence level, whether that be in areas of speed of service or order accuracy.

How drive-thrus fit in, I'm still scratching my head, and in my mind it's still a big question. Gray Taylor, at the CxVG meeting, said, "Don't put in a drive-thru window," yet the InTouch Insight research shows that almost 50% of consumers would avoid going to a restaurant without a drive-thru. And I continue to hear from other convenience mobility retailers that they are adding drive-thrus. So it'll be interesting to hear, among you folks, your thoughts on drive-thrus as well. And Rob, I wasn't expecting a cooking lesson from you, Chef Rob, but it was interesting to hear about sous vide as a cooking technology that could help address and enhance the consumer journey. It does suggest to me that kitchen equipment, as you said, is becoming a critical part of the tech stack through IoT devices and then really the increased network connectivity requirements in c-stores and the supporting commissaries.

A speaker at the NACS Leadership Forum just a couple of weeks ago acknowledged the long foodservice journey convenience retailers have been on and said they're really approaching a "pivotal moment" and that for the category to contribute high gross margin in a relatively small box is going to require, "Leaning into food a little bit more." So CTVG members, how are you as retailers or solution providers leaning in on this opportunity and the changing consumer journey?

Foodservice Technology

One note I'll make pertains to Steve Morris, who is one of our CTVG members but can't be with us today because he's got a grand opening that he's at. He recently made a decision to move ahead with a technology from a company called UpDog which helps them monitor and react to what's going on at the roller grill.

He recently told me that with technology, as many of us know, it takes more to get things implemented than it does to say yes, but I wanted to point out that there's an example of something that a small retailer is moving forward with. Steve did say that he's delayed it because of some other business opportunities, and part of the delay has to do with implementation and what it takes to get something like that up and running. So again, I think it's just one of the challenges

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Cameron Watt

that you probably all experience with implementation of foodservice technologies. It would be good to hear about that. I want to go back to something that Chris Egan put in the chat. Cameron, it was a question for you relative to satisfaction levels and how those, or did those vary amongst different age groups or changes with other demographics besides age?

Absolutely, is the short answer. And I'll start by talking about research we did around self-checkout. And self-checkout, young consumers were twice as likely as older consumers to want self-checkout. And I'm going to point that out first before I get into kiosk because the reasons they gave were really interesting. The reasons that the young people wanted to have self-checkout was they felt it was faster and because they didn't want to talk to anybody.

The reasons the older people wanted to have a cashier was because, wait for it, they thought it was faster and they wanted to talk to somebody. And so it's no different when you look at any of this type of technology. In this particular study, if you were 18 to 24, about 59% of the people preferred the self-serve kiosk, and then there's another 11% that didn't care. Whereas, by the time you get to the age 65, only 6% of the people wanted to use the kiosk, with 81% wanting to see a cashier.

So, depending on your demographic, depending who you're targeting, depending on your market, absolutely. And between those two data points is a straight line. The biggest drop-off is probably around that 50 mark in terms of where it starts to be not quite as good. But up to age 35 it's probably pretty even in our research, whether or not you preferred a kiosk or whether or not you preferred a cashier. You get over 35 it starts to skew preference towards the cashier. Once you get over 50 it starts to be, "I'd rather have a cashier." And so absolutely demographics is a big part of that. And it has a lot of that has to do with just their desire, honestly, for that human interaction as part of that experience when they're out and doing things in the world.

Ed Collupy

Very good. Thanks, Cameron. Chris, did that give you some insights on demographics that you were looking for?

Christopher Egan

Yes. I appreciate that, and that matches exactly what we see, so glad we're not on an island.

Ed Collupy

Yes. And as long as you're speaking, just take us through your other comment that you were making about the equipment itself and your experience with the kiosks relative to cables and those types of things.

Christopher Egan

Gotcha. Yes, and we have made-to-order ice cream, so there is a lot of customization in ours. We do have especially older customers who want or need more assistance. And that's one of the big challenges. Not just the glare and the placement. It's how do we allow an associate to not have to walk around the counter but assist that customer when they need it? We

Kiosks

Ed Collupy

Rob Grimes

originally allowed them to turn. Pulled out a lot of cables, damaged a lot of ports, so we're now experimenting with just a dumb screen that mirrors it. But just curious if anybody's solved that or if there's a good solution that's out there.

Anybody going to raise their hand to help Chris out with a solution? Rob, you've got your hand up.

First of all, the IFBTA has something called Exchange, which you can just go log on and you could say, "Kiosks," and you'd see solutions in there. It's not sales stuff, it's just information. So people have tried all kinds of things with kiosks. They've also tried doing a cash register that flips around, that when you're not busy it becomes a kiosk as well. But the one thing I would just challenge you to, really quick on this, is we've found that nobody's exactly sure what a kiosk is, because a kiosk can simply be a tablet that has your online ordering platform on it on a stand, to be very clear.

And in full-service restaurants like the Yard House, they call them kiosk on a table. And you can sit there. Your kids are playing games, you're ordering stuff, you're calling your server. So if you expand your thinking about what exactly is a kiosk and maybe not think about the traditional thing that we're talking about right now, which has wires and it's big and bulky. But actually you might want to experiment with placement of a kiosk by doing a tablet and putting it onto a holder somewhere, and putting it in different places so that you can actually try it. Because if you have a good online ordering platform and it's integrated into the unit, first of all that's a much cheaper way of doing it to test it out. And people have tested that out also with handhelds down the drive-thru to take orders, like Chick-fil-A.

Thanks, Rob. Eva?

Ed Collupy

Eva Strasburger

Mine was not going to be a solution. Mine was actually a different question, but I think Rob's answered that.

I was going to mention, at the Global Convenience Vision Group yesterday, the presenter was someone from Circus. And they were talking about the new AI robotics. A very slick-looking piece of equipment that they're about to launch and deliver in May. And it uses robotics to create about five different bowls of fresh meals, different choices, in four minutes. It was pretty phenomenal but there was a lot of pushback about the fact that several of the c-store operators were saying, "This just isn't going to work for us because our customers want interaction." Yet I suppose that the main point should be, it depends on what the age of your demographics are.

The other thing that got the most excitement about it, though, was putting it in the back of the house or using it as a dark kitchen to then be able to deliver the meals for the grab-and-go's in the different stores. But it was something that



**Foodservice
Technology**

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Ed Collupy

Anthony Raimato

Kiosks

everybody here may want to look up because it's the future in the fast-food delivery or fresh food. Or read our report when it comes out.

Editor's note: Circus Group (circus-group.com) combines AI and robotics, paired with proprietary software solutions to achieve full autonomy in the foodservice industry.

There you go. Ant, I saw that you had your hand up.

Okay. When it comes to the hardware discussions for a lot of kiosks and those type of items, I know Elo and HP have some more expensive options that have that built-in swivel to them, so you can quickly flip it around if you need to do something. HP actually had a model I think like five years ago even where you could just undock it really quick with a trigger lock so you could quickly pull it off if you needed to take it somewhere or replace it, do those types of things. And it was very easy to manage cords for a printer if you had anything like that.

But some other items, we've looked around just in general at different hardware. Anytime you're spinning those cables around, it just gets really messy. So trying to find some sort of combination of contactless charging and cheap throwaway cables that at the end of the day you could just easily have a tablet that you bought for \$100, can replace in three years because it's consumer grade OS, but still use the same charging platform and replace the cables with \$10 cables. It's always that hunt of balance for what's a really good investment that's going to last you 10 years and what's something you could quickly pivot and change your whole customer experience every three years if you wanted to do it.

Ed Collupy

Roy Strasburger



Richard Poye

Very good. Roy Strasburger, did you have something?

I did, but I'm going to go off on a different tangent. So if Richard has something to contribute to the conversation about hardware and kiosks, Richard, please go ahead.

Certainly. So one of the things that I've always struggled with within a grab-and-go environment and convenience, and when you think about within our environment, many cases retailers inventory once a month or once a quarter. And what happens is solving the demand planning, production planning, those types of things within a grab-and-go environment and being able to anticipate increases, decreases, weather patterns, different trends, those types of things, and so I think we're getting ahead of things when we've talked about robotics, and I think in many cases we should focus in on how do we properly get the right ingredients in the store in the first place and then have the right levels to produce those types of things. So I just wanted to put that out there.

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Ed Collupy

Bill Ridge

Major Oil

Strategy

POS

But we're talking about kiosks, but when you really think about it, a hot grab-and-go case is kind of the original kiosk. And you're going up and getting something out of a grab-and-go case, and so if you have the right quantity, the right product in the right place, that's what we need. And I see that there's a massive opportunity and convenience where we're not linking, like I said, the POS to ordering to production and those types of things.

Very good. Bill Ridge.

I don't have a lot of answers to these questions, but I do have some comments that I've written and taken some notes, and you've all heard me say this before. We're a branded convenience store of 12 sites, Shell and Exxon, and we've remodeled two stores within the last year with an emphasis on putting out a new foodservice brand in two of those stores, so it's eventually going to go to all the stores, and being branded has killed us. It hasn't "killed us," but it's made everything very, very, very hard, and that's because the limitations we have on the POS side of things, giving the customer an app, an online version, a kiosk thing, and having that integrate with your POS when you have limited options. In our case, it's Verifone, and I know Verifone has something or is coming out with something from a foodservice standpoint. They've been coming out with something for about the last five years, so hopefully that'll progress. But we've had to go with our back-office retail side, which is Petrosoft.

We have kiosk and mobile ordering only. You cannot order at the register. With that said, we've learned some things. I would put your kiosk in front of the kitchen instead of by the registers because people will always go to the register and try to order. So at least this way, when you have people in the kitchen, they can help the people who are trying to order. Also have signage in front of them that's prompting them and giving them some ideas that also contains the same pictures and things like that that you have on your kiosk so they can quickly get to the items. We've not had a lot of problems with people having to order or learning how to order, and I think that's just because of the effort we put into the signage and the way we've created our menu items.

One of the problems we deal with is the food order is a department sale. It comes in as a barcode and you scan it at the register, and basically, it's a fractional quantity, so it's a department sale, because the POS knows nothing about what items you got. It just knows that it's a department sale in food and service. That creates a problem for loyalty or any kind of deals you want to offer at the register on a particular item. So if you want to do happy hour pricing, you have to change your kiosk to change the menu for retails at different times if you want to do that kind of thing. So there's a lot of disjointed things there.

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You have to pay in the store. We could offer online payment, but like with every disjointed thing, the payment will not come into our back office with the shift, so our store people would have to enter it, which creates a lot of problems. So we're in the midst of trying to figure that out. Customers can pay at a self-checkout unit. We do self-checkouts, and we do have a lot of people that order food when they go to the kiosk, they'll just go straight to the self-checkout and scan their barcode that came off the kiosk, and they can pay that way. So it's not like they have to go pay at a register if they need to do that.

We do have a drive-through pickup window in one of our new remodels, and the pickup window is off the kitchen, and we do have a register there. We haven't opened it up yet because it's brand new, and we're putting in signage, and we're hoping that signage will stop people from going in there and trying to order, but this will be a pickup-only window that's attached right off the kitchen. We do also offer 20 to 30 of our most bought items from the convenience store right there too, so they can order something like that in the app if they need to do that. Instead of pulling up to something, we do have the capability of drive-up and check-in so that we can bring you something out, but with limited staff, that's just crazy for us. So having the window there, we hope is going to be a way that we'll push this process without having to go out and do that and give people the convenience of doing it. Those are the things that I have.

Just a few, Bill. You have a list of challenges for sure.

It's just been very challenging, and I recently had our director of stores come up to me when he was trying to offer some combo or a loyalty thing on a specific item, and he goes, "How come we just don't buy the things that'll allow us to do this? Certainly there's products out there to do that." I said we can't. We can't make it work all the way through the chain to our back office. Our POS doesn't lend itself well to ingredient-based inventory. When you're using lettuce and tomatoes, and you're trying to say, "Yes, I want that on my thing," it's not like I add tomatoes on your POS, and you just say, "Okay, that's this much." So there's lots of pain when it comes to all that, and I think I'm hoping that some of these POS vendors will catch up from the branded side from Verifone, Gilbarco, NCR. NCR, we did have some better equipment there. It's still hard to interface when you're dealing with the brand, and there are versions behind things like that. So it's painful. It's all I have to say about it.

I'm going to let one of our solution providers who has their hand up solve all your problems for you. So go ahead, Jeffry.

Ed Collupy

Bill Ridge

POS

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Jeffrey Harrison

Promotions

Oh, I've got enough trouble with Parker's and Spinx. No, I'm just joking. But no, I just was thinking a lot about where does the technology meet us today? I know we're talking a lot about futuristic stuff, and that's really important, but just some ideas for people to think about. Luis, you might remember with Spinx, you guys had the CluckaPalooza promotion that you guys used to print out on a receipt for people to enter to join CluckaPalooza to win free chicken for a year, which obviously everyone knows Spinx has delicious chicken. And what we did is we put it on their smartphone app, the new Spinx app, and they had a 500% increase in contest entries just the first year alone. So if you're doing contests and doing stuff like that when it comes to foodservice, make sure you're thinking about your digital presence. I think that's very key.

Another thing, too, that I was thinking about is we're seeing a trend in a lot of retailers that sometimes make too much product in their grab-and-go, or they have product that's going to expire, whether it's milk in the coolers or other things. I think something we haven't really talked about in this conversation is food waste, and I think that's a huge issue and a huge opportunity that technology can fix. We're spoiling food all the time, and that's not good for our image and our brand, and it's not good in general. So what we've done with our technology on the app side is made it where you can hyperlocal a store and do like, "Hey, we went crazy and made too many breakfast sandwiches. The next 20 people that come in, you get buy one, get one free," and you segment it to people that have bought breakfast sandwiches in the past only in the geo radius of that area, and you're able to bring them back in.

And that's what we're trying to do to do that, and the results have been fantastic. We've been piloting this with a couple retailers the last couple of months, and that's kind of our focus right now is just each person's different, each person has different preferences. You have your people that just come in for breakfast or just come in for a lunch item or something like that based on where they work and their patterns. And identifying those patterns will make you more successful, especially when they're outside the store and bringing them back in. That's what our number one focus is right now.

Luis, you are mentioned there. Do you have anything to add to Jeffrey's comment on that program?

Ed Collupy

Luis Ackerman

So Jeffrey, he's right. As we campaign, we do these micro-campaigns. We hyper-focus into bringing a lot of attention using the app, some messaging within the store, but really getting into the app and drawing attention into these, whether it's CluckaPalooza or last year, February 29th, where we did that Xtras Day promotion. That was a huge deal. I think we had like 70,000 additional transactions just on that day. It was a great campaign but using that digital platform to communicate.

Promotions

Ed Collupy

Donnie, you had your hand up.

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Donnie Rhoads

Major Oil

Thank you. I want to go back to what Bill was talking about. Bill, I'd love to buy you a drink some time and talk about our similar paths that we're undertaking right now. But we're experiencing similar challenges. I won't dive deep into them, but the question with technology when it comes to foodservice in our stores, the common denominator always seems to be that integration with the fuel POS. And I guess if people want to answer, I'm wondering how important that is to everybody else. Our presenter mentioned that things are a little more plug-and-play now, and on the restaurant side, I totally agree, but if we're going to have to have things run through the register at the end of the day in our stores, I've just found nothing but headaches, and I've seen it as a restriction more than an opportunity.

And it's kind of got me down this road of thinking, "Okay, am I running a c-store that has a foodservice element, or do I have a c-store, do I have a restaurant inside of the c-store? And do I try to keep that siloed on purpose for technology reasons?" And I think that you could go either way, especially as the complexity of your operation with the food that you're making increases. I'm curious to hear other people's thoughts.

Very good. Jeff Carpenter, go ahead.



Ed Collupy

Jeffrey Carpenter

Strategy

Yes, I originally had my hand up to circle back on Bill's comments, and just hearing Donnie, we have a small chain of stores, very heavy foodservice, made to order. To follow up on your last comment there, Donnie, we try to go to market as an operator of food first, restaurant mentality first and looking at our operation with that front of mind. We like to consider that if you're doing that well as a foodservice operator, a lot of the pieces that fall into line with the convenience side are reflected as well. Clean appearance, good customer service, speed of service, friendly environment, good experiences, those go hand-in-hand quite well.

But I can hear the frustration in Bill's voice with the integration piece because we feel that too. Being a recipe-based inventory in our foodservice operation and looking at things such as self-checkout with the number of permutations that can exist with 12 different proteins that you're offering as a sub, and then the ability to add additional items to that sandwich that might affect the retail with add cheese, add meat, extra meat, or a variety of other add-on additional cost items becomes difficult to manage. And then communicating that through the POS to make sure the inventory is released correctly and then adding layers, additional layers of loyalty and other items that becomes somewhat of a momentous task or at least it feels that way as a relatively smaller operator. If you're looking at different software or technology applications, not having a large IT team on staff, sometimes it feels like you have to almost weigh best practices in terms of options that are offered for technology services versus that of which communicates and works cohesively together.

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Ed Collupy

Sanjit Bajimaya

POS

Ed Collupy

Rob Grimes

POS

And going back to Rob's comments about it being in the family, I kind of felt that way because you look at other QSRs, and they've been doing it for decades. So the technology is there, and I'm interested in following up with his group and maybe getting some initial contacts or maybe being able to share some feedback to move things forward for convenience retailers. Again, to Bill's comments and Donnie, it's frustrating.

Thanks, Jeff. Let's see. Rob, you put some things in the chat but let me just go to Sanjit. Sanjit, can you just recap your comment.

Yes. I feel the pain being shared by everybody. I think we have the same kind of situation where we have a back-office solution. We have a legacy POS at the pump, and now we are trying to bring foodservice technology in the picture. So there's a lot of integration, and if there is available integration, I haven't found any solution that can integrate well with the legacy POS system or the current back office solution. So it's very hard to deploy our foodservice solution seamlessly, and it requires technology out there in the market.

Very good. Rob Grimes, you were pushing back a little bit on this idea of trying to integrate everything.

Yes. So we have no dog in this one. The observation is this, because we get asked this question all the time, and usually people start with one of two things. What's the best system we should put in, because you've got to know what it's got to be connected to, or how would you go about doing this? I will tell you on the last thing, as soon as somebody says to me, "We can't find it or we have to custom do it," I won't say no, but so far, if you know where to look or you're creative in looking at it, I have so far found everything out there without ever having to do custom, even in the integration. So I've worked with a lot of people, like Dunkin' Donuts for instance, that had 45 different POS systems around the world because some of them were just carts in the Philippines.

And so the challenge is not to force people to change their POS. You standardize, as I wrote in the notes, on the back office because a universal back office or a global back office can pull the data from 15 different POS systems, and I'm certain that there are some back-office systems that already integrate with ones that are used in the convenience industry.

The other piece of advice we give people, and I'm not going to pick on any vendors, I've heard a couple of vendor names that came up, but I will get people who say to me, "Toast is one of the leading providers in the foodservice industry and restaurants, and they introduced Toast Retail with a bodega at NRF." Well, so people will say, "Oh, I see Toast everywhere. Can we put Toast in?" And that's really not the question.

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So when I give advice to people just on how to do it, not what to do, I will tell them that, and you guys would all know this, that you start with the software first because you need the functionality and the features. The second piece you'd select would be hardware, because you should not make the assumption that just because somebody has their name on a piece of hardware that you have to buy their hardware. Case in point, Starbucks. Starbucks is using MICROS Symphony, Oracle Symphony. It is not running on Oracle MICROS hardware, and Toast, even though you don't know it, will run on other people's hardware, because the big chains are not going to throw it out.

So you choose the best software first. You'll probably find that that software might work on some of the hardware you're already using, and then the last thing I'd do is services, because you don't know what tech stack you're going to have in individual places in it. But I think if you're creative and you know where to look, you can probably find something that will work and will integrate in it. But as I said, I'm not so focused on the gas pump piece that somebody brought up, because people pay for gas also up at the register, but if you tie it in the back, you might decide that you don't want to give something on the foodservice systems, you want a real foodservice system. Now, you just need to make sure that it will tie in the back office for reporting.

Ed Collupy

Thank you, Rob. And just as a thought, going back to what Bill Ridge was mentioning on the fuel brands and the complication that. That rang so familiar to discussions that CTVG had and many of you here were in a meeting a year or so ago, where we then invited a number of the solution providers, including our folks from Invenco GVR and GK software, who are our Ally Supporters. So just thinking about fuel brands and the comments that even got raised during cybersecurity and other discussions last year, and it's come up again today, I want Bill Miller maybe just to address this idea of integration and fuel brands, if you don't mind.



Bill Miller

Major Oil

So I agree with a lot of Rob's comments, especially if you're a retailer with an installed base of a legacy solution, and you don't want to replace it, and the back office is a better integration point. At GK, we're seeing a lot of retailers, though, making changes to their POS because most of the systems in the convenience store industry are 20 to 30-year-old technology, and they're terrible at integrating and they're not open, and sometimes they only run on one hardware platform, the vendor hardware platform. So those are all things at GK that we've addressed, and we're working with some really great convenience retailers in foodservice right now, and we're going to learn from them. Some of them have written their own kiosks, their own kitchen production systems. Often, they want to order at their kiosks, but they want the customer to be able to pay and buy other items and check out at the self-checkout or the POS. And so the integration

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Ed Collupy

Paul Kern

POS

Major Oil

across the POS platform and all those touch points, I believe, is very important if you can do it. Now, these retailers tend to be larger, unbranded retailers. It's much harder in the branded space because the major oils have had to go to the lowest common denominator in all the POS systems. They've got to be simple, they have to be low cost, you got to be able to sell it and install it affordably to a one-store retailer, and so they lack in some of those capabilities.

But I think all that is going to be changing over the next few years. We're seeing increased attention and competition in this space with POS platforms that are more open, like we are. And I'm not going to be a bit surprised to see more and more restaurant POS companies say, "Hey, I'm interested in getting into the convenience store industry. I'm going to build a fuel module, I'm going to start there, and then try to become good at retail." But there's retail POS and restaurant POS, and they tend to be very separate, and nobody's done a good job of being good at both that I'm aware of. We're trying to get there, but we're not there yet. So that's my perspective.

Very good. Thanks, Bill. Paul, I knew you were going to chime in.

I represent one of those major oil validated or allowed solutions. So look, I think the key ultimately is being able to integrate with other systems and being open, and obviously, I'll even say our system, while we're moving in that direction, probably isn't as open as it should be at this point. I think we, along with a lot of the industry, are looking at how do we add more foodservice capabilities, but I'm never going to be able to offer everything, especially when you start getting into things you need in the kitchen. So it's all about being able to integrate with that. I will say that some of the capabilities brought up are available with major oil approved POSs, but in some cases, they do require you to buy more pieces of the system from the same vendor. But I think even the others, I'll call us more traditional providers in the industry, are starting to move towards more open platforms for some of that so that we can bring both major oil access and some of these other capabilities.

I think on the fuel side where folks run into challenges trying to bring external foodservice POSs in, it's obvious the forecourts are a challenge, but it does come down to payments and some of the loyalty schemes and stuff we offer. There's a ton of complexity there. And so if you throw a Toast in one of your stations, you're not going to be able to take all the same payment cards that you take at all your other POSs out at your pump, and your loyalty, it's going to be a problem. And so it becomes a question of what's more important and what type of integrations are good enough. So I do think solutions are changing. Go walk around to all of us at NACS. I think you'll start seeing more and more. I know in our own

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case, we showed a lot more foodservice related tech and capabilities this last year. Maybe not enough to solve all your problems, but it's the direction I think a lot of us are headed.

Ed Collupy

Thanks Paul. Ant, you're up.

Anthony Raimato

This was good, because I was about to say everyone's talking integrations, which is really great, but I think if you've got like 50 stores or even 100 stores, that price point does not sound good in a sales pitch. Go out and buy your best-of-breed fuel, get a really good POS and back office, and then go out and get your best-of-breed to go build a kitchen solution for your customers. It's a very, very expensive proposition to go get the best-of-breed.

So really what Paul was saying there, and even what Bill was saying, it really comes down to how much can you invest into your individual sites to really maximize everything. And one thing that I can just say right from experience, I'm sure everyone else has felt it too, you have to pick that one thing and really place your big bets on what you think has the best impact for your individual sites and for your customers, what you think they are going to get the most enjoyment out of, and really target back to them what value you can bring through either integrations, through loyalty, through hot, fresh foods. It's quite a balance. There's no perfect answer.



Ed Collupy

Jason Collins

POS

Very well. Jason Collins, let's hear from you.

I agree with everybody on here, especially on the branding conversation. I think the issue is it's having the smaller IT teams having to manage multiple point of sales. The dream scenario is you have one point of sale everywhere for food. It's all the same payment networks, all the same loyalty network. Paul touched on that. Bill brought up having one point-of-sale system. I think we're getting there in the industry. We do consolidate as much as we can on the back-office side, but it's still that front side dealing with a major brand, their payment network, their loyalty along with our loyalty along with trying to make food and everything else.

It's a lot at the site level and having a small IT team having to run multiple point of sales in order to get that done currently. We have a food concept; we have a different point of sale on that side. We are consolidating on the back end with our back office, but the front side is still a different point of sale for what we want to do. So we have two payment networks, two point of sales consolidating on the back [office] in store and two sites. I don't think I'd want to do that across 100 stores.

Ed Collupy

Jason, just thinking about the first part of the presentation where it was focused on the consumer, do you find or do your operators find that the consumer has concern regarding having two point of sales?

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Jason Collins

Ed Collupy

Steve Evans

Strategy

Strategy

No, I don't think they know a difference on their end. They wouldn't know a difference, but just on our side we have different employees working each side so there's no cross-training at those locations.

Very good. Thanks. Steve Evans.

So at Haffner's we feel all the same pain as everybody else. And someone previously really hit it on the head because you really do have to choose what you want to be and then build the tech around it. Because a lot of us, I'll say from our side, there's folks on this call and out there that are really, really good at foodservice. And they've been a foodservice provider for years and their tech stack grew up around it. For those of us that are really getting into it late we're fuelers and we were hot dog rollers and now we're trying to be foodservice guys.

It's those of us that are really stuck. And we've loved experimentation. We've got delis, pizza, grab and go fresh sandwich. I had one store that had two QSRs and a c-store and every part of that store ran in a different POS system. So we had three POS systems, three back office systems, so to figure out the P&L you needed three POSs, three back offices and a consolidation ledger. And we really came to our senses we're like, "This is insane, we can't do this anymore." And so we've actually taken a step back on the tech side and really trying to zero in on what is our foodservice concept that's going to work?

And then when we land with that we're going to deal with all the hairy problems that come with can I get it right? Can I get it on the app? Can I do this? Figure out the foodservice concept that works for us and then rebuild the tech around it because it's untenable for all the reasons that we've talked about here. But those that are really good at it, I think what sets it apart for me, is they figured out the foodservice they want to be and they've built the tech around it or they've lived with the limitation. That's where we stood. And I'm happy when we figure that out so I can get down to maybe two POS systems in a store. That'd be awesome.

Ed Collupy

Very good. Thanks Steve. Donnie commented in the chat that he can see a consumer knowing the difference when you have to tell a customer you can buy your burger here, but you have to prepay for fuel over there. And just because that's a consumer related comment, let's let our friend Cameron go next with his comments.

Cameron Watt

You know what, it's almost good I went after Steve because that was exactly a theme that I was going to go with after listening to everybody, which is that I'm hearing a lot of discussion about this and that and people even said, "Well, people notice this or that and what about age groups?" And I presented a whole bunch of different things, for example, like customer journeys. Rob talked about omnichannel.

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We can debate the language, but at the end of the day, you have to start by figuring out what your customer experience is. Until you've decided what customer journeys you want to have, what customer journeys you want to support, then it's very difficult to decide what your technology needs to be. And so Steve was talking about that in the same context, which is, what foodservice do you want to offer? Are you trying to be a sit-down restaurant? Are you trying to be a pickup location? Are you trying to be in the pizza business? Are you trying to compete with drive-through and speed of service? What are you trying to do? And I would take it a step back farther than even what foodservice do I want to offer?

And I would say, what is the customer experience that I want to support? What is my brand promise? And it doesn't have to be everything, and it doesn't even have to be perfect. I'll use an example, and I apologize to anybody who may work at McDonald's or has been in the store, but McDonald's is a great example. I do not go to McDonald's and expect to have a perfectly looking burger. My Big Mac does not open and looks like it does in the commercial, it is all over the place between buns and pickles.

I mean it's everywhere. But it looks the same at every McDonald's I go to anywhere that I go in North America. I'm going to get the same experience. And imagine if you grew up with this perfect looking burger like the commercial every time and then you went to a different McDonald's that didn't get that. And so it's not about getting the best this or the best that, it's about what is your customer experience promise? What is your brand promise? What experiences and journeys do you want to support?

And once you've identified that as a brand, I believe the technology today, and Rob has hit on it, is much easier to get to because what 10 years ago you couldn't do, you can today. What vendors can cobble together and integrate now with some of the technologies and some of the new versions that are out there is amazing compared to what it was 10 years ago. And so I would challenge you if you can figure out what it's trying to be, the technology will follow you. You can find it if you look for it, but don't start with looking at the technology because then we get into these rabbit holes.

Ed Collupy

Very good. Emily, I'm going to call on you because as Steve was talking and now as Cameron reiterated what Steve had to say, I keep thinking about Sheetz being restaurant first. And so I'm wondering if you can maybe answer this chicken or egg question of whether it's brand and what you want to be first or is it technology first? If you could share some thoughts on that.



Emily Sheetz

Strategy



Ed Collupy

Rance Well

Training

I mean it's hard to say for me, given that the business has kind of grown up with both for the past 40 years. I will tell you we often talk about how no one in their right mind would get into this business if they had some sense about them, but we just fell into it and it grew from there. I do think we're still trying to get our technology to catch up to the brand promise and the needs of our employees to deliver that brand promise, but I think it always has to be the brand that comes first.

Thank you. I appreciate letting me put you on the spot there. And frankly I'm not surprised by your answer there at the end, so very good. Let's see. Rance, you had your hand up. So what were your thoughts?

When it comes to the back office, I have just about every system everyone talked about that we're dealing with now as a point of sale. We have QSRs that are integrated into our back office. We have the Toast; we have the Square registers. We have all of those. A lot of them are just a swivel in a chair taking data from this system, put them in another system. But I think it was Jason that talked about the different point-of-sale systems and the struggle of training our front-end team members on all those different point-of-sale systems.

We have enough of a workforce out there. We would love someone from another division to come fill a shift at a convenience store or someone that works at a truck stop be able to work at a regular shop, someone that doesn't work at a truck stop, go fill in at a truck stop that has that calm data register. There are so many additional training modules that come with all the foodservice, all the different cash registers and I think maybe there's been a shift, maybe we've reached the top of the mountain and it's all been received.

I hope it's the case. But again, there's only so much work you can put into something before you turn around and go, "Well, let's not integrate any of the systems and just get it done." And that's something you don't want to hear, but as a retailer that does have a lot of different front-end point-of-sale systems, it is sometimes frustrating because others can do things like McDonald's, things like Taco Bell, when you can't with your current technology stack.

Ed Collupy

Very good. Thanks, Rance. Jeff, do you mind recapping a little bit of what you put in the chat? It looks like you were helping fellow colleagues that have other job functions within the business as it relates to this, especially accounting and stuff.

Jeffrey Carpenter

Yes. We are leaning in heavily and have for some time on delivery and online ordering. And one of the struggles that we still seem to have a little bit, we have some workarounds built into it and I've had other non-competing retailers reach out to see what we are doing as well around the accounting piece of delivery. There seems to be some struggles with the reconciliation piece with that as we've heard from some different accounting teams about how that works with the

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Ed Collupy

Rick Sales

extreme variable cost of delivery distance and what retailers are charged based on that. And as that segment of the business grows it becomes more important to us. And as I said, we have some workarounds built into it, but it still seems to be a little bit of an uphill battle.

Very good. Rick Sales, I saw your hand was up.

Hey, thanks Ed. So some people have made some great comments that I've been thinking about Emily, Steve, Cameron. My opinion, it's all about the brand promise and the consumer experience and technology is there to enable that; technology cannot create a brand experience. And we spend a lot of time with clients discussing what experience they want to create and how they're enabling the brand promise in the store. And we do digital signage, and digital menu is one of our big offerings. I can tell you today that we probably have 30 different implementations of digital menus.

We have clients that can handle four pricing tiers, multiple dayparts throughout the day and even allow a store manager to remove an item from the menu that they have run out of. We have other clients that cannot execute at that level, and to try to execute at that level would damage the brand promise and they may have the same price on the same menu everywhere. And I think those are different businesses and as long as they execute to their brand promise people will be very happy. And technology, we try to build out technology to be evolutionary and iterative because people are always learning from what they're doing and trying to do it differently.

We have apps and menus that integrate advertising. Now you have to think about how quickly a chain can generate an ad or how long does a promotion need to live? How long does an LTO need to live? I mean, my technology can change that every hour, but you can't execute that way. So I think this marriage of what you're trying to deliver and what the technology can help you with is super important in our industry and I see a wide range of implementations, and as long as the retailer is matching their capability to their brand promise it works great. When that doesn't match it's very difficult and generally can lead to failure because customers are dissatisfied with a bad brand experience.

Very good. Thanks Rick. Roy Austin, I know at that last meeting you had just joined your new company. Have you encountered this foodservice challenge yet there?

I haven't encountered the foodservice challenge yet, but I can definitely echo Bill and Jason. I mean the journey that you want as a business can be built by the major oil because they're going to tell you what POS you're going to run and that's where it starts. If we have five different major oil brands and, if one like BP switches to another POS provider all of a sudden



Ed Collupy

Roy Austin

Major Oil

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we have two new POSs that we have to deal with and you have to try to build an experience based on that. It's not fair to the retailer to have to try to figure out how to keep dodging all these bullets that the major oils throw at you. You can have an integration through an app and online ordering to your back office, but if you just want one single self-checkout system for your stores that's where the major oils just come in and throw a wrench in everything you're trying to do.

Ed Collupy

And sort of to that point, Jason, do you want to echo what you said in the chat there?

Jason Collins

Yes, that's the dream scenario we're all looking for. One point of sale, one payment network that works with every QSR brand in the same back office. Like the sites where you have your own foodservice and then maybe you have a Dunkin' Donuts inside your location or a Subway, that Dunkin' or Subway is probably going to require a different point of sale. Then you have a second payment network as well. I'm sure the accounting teams would love to have only one payment network to deal with everywhere. But yeah, I think we're all saying pretty much the same thing on here.

But when it comes to the brand, we control the brand so you can control quality of your sandwiches and your food and the customer service. That's the brand. You can make that pretty standard across all sites regardless of technology.

Ed Collupy

And Jason, just in case you didn't see it there, but Robert Green from GK gave you a thumbs up. There you go. Roy Strasburger, you said maybe you had something to add.

Roy Strasburger

I'm not sure if I had something to add. I did have a couple of questions for Cameron, though. Not to go too far off base here, but first of all, thank you for your presentation. Cameron, a couple of things that I noticed in your slides. You were talking about the customer experience with the pizza companies. Question number one is, were the pizza companies doing their own delivery or were they using third-party delivery?

Cameron Watt

Yes.

Roy Strasburger

Okay. Both.

Delivery

Cameron Watt

Yes. And to be honest with you, because that's the case, that study was carry-out only. We did that third-party delivery study, which I also showed you which was all third-party. We've done some first-party delivery study. And typically, first-party delivery is a little faster, it's a little hotter, we kind of know that intuitively, but it's also going away. What we found when we do this study even the people who you think being only first-party delivery are not anymore, they're also third-party delivery. And so that study that you saw was only carry-outs. So it would be apples to apples.

CTVG Views

In The Room with CTVG

Presentation

Roy Strasburger

Okay. Because it's interesting with your first-party delivery I think you would control the customer experience more. And it's really interesting. Myra and I were at the NACS Asia Summit in Tokyo last week and one of Hank Armour's big things about delivery is if you're going to do delivery you need to do it yourself. And he's always referring to the pizza model as the way to go, which is contradictory to what you're talking about because of the costs and the basket size. But the second question, and I know we're getting close on time, you also talked about the customer experience with lockers. Did any of the research go into how people felt about having to get out of their car to go collect their products at a locker as opposed to let's say a drive-thru window or a curbside service of some type?

Pickup

Cameron Watt

The questions weren't asked in that specific way, but the data's kind of there. I mean, intellectually you're in the car and you're in the drive-through. When we're measuring their satisfaction we did ask them how their pickup experience was, which if you're going to a locker you got to get out of your car and go there. So we didn't say, "Do you like getting out of your car?" We just asked them what was your satisfaction with the pickup experience versus what's experience with the drive-thru? And they had strong results for that pickup experience, which automatically was getting out of your car.

Roy Strasburger

Pickup

Rob Grimes

Okay, thank you.

I'm glad you brought up the locker thing there because if you think just in the siloed thought of a locker and what we just talked about, half the time it's other industries that do it to us that create the demand and then the customers want it. So just a few locker things for you which I meant to say in my presentation. When I go into a 7-Eleven and I see Amazon lockers in there, that tells me that people are willing to drive to go make a choice at a pickup point. What they haven't gotten to yet are hot and cold lockers in there.

And I am aware, of course, that 7-Eleven bought one of the online ordering companies because they've decided that they might want to deliver you things from 7-Eleven, but they also make deals with other restaurants along the way and we'll deliver all of it, or it can be delivered to the central site and put in a hot and cold locker and you pick up. Case in point, shopping centers in Israel, or actually Dubai, tested them because of the heat. The orders come in centrally to a central pickup point in the shopping mall and you pick them up and you go home and all the delivery comes to a locker which, by the way, is the exact opposite of doing a ghost kitchen or something like that where they're being prepared there and going out.

CTVG Views

In The Room with CTVG

Presentation

And then the last thing I would tell you is go take a look at office buildings right now and you go take a look at people like Sodexo, Aramark, Compass that are doing office buildings because people have limited time to eat. A lot of them are starting to do central pickup points where you can order. If they don't offer foodservice already there, you can order and just pick up, but they're making it easy for you to order from the community and deliver it in. So lockers are going to be a very hot thing here, pun intended, in that, hot and cold lockers and they absolutely are going to come about and that's going to be an opportunity for us to put them into more different types of places.

Roy Strasburger

Well, not to over hype the NACS experiences, but last summer they had their European one in Barcelona. I am not going to discuss the hot and cold lockers because I think that's a totally different subject, but Repsol put the Amazon lockers in into their stores, not for people to come and pick up, but for people who have a return. They would come and do the returns from those lockers and that's what was driving the traffic through their stores - people sending back the stuff that they got from Amazon that they didn't want. They had very little in the way of actual picking up out of the lockers, which I thought was a really interesting twist to that.

Ed Collupy

And I thought you were going to mention as Rob was talking about office buildings that one of our CTVG members, Ray Huff, who's not with us today, has these stores and office buildings and I'm sure he would've added on to what you had to say there, Rob. So we're missing Ray today. But once again, we've filled two hours. I know I have learned from each of you and clearly there are many ingredients, again, to put the pun there, to the foodservice technology topic. The convenience mobility industry has, and based on our discussion this afternoon, will continue to make progress in the foodservice category. But I think we still need to stay vigilant to what has become a much wider category, not only across the hospitality industry, but throughout general retail as well.

Cameron and Rob, much appreciation for joining us today. Thankful also to our CTVG members for your voices, your thoughts and your ongoing spirit of sharing. The Vision Group team is always bouncing around ideas for topics for our upcoming meetings. It would be great to hear from you, our members, on what should be on our list for future meetings. Just a reminder that our second quarter meeting is planned for Friday, June 13th, which should be on your calendar already. And I always appreciate any comments and feedback you provide. Continue to send them along or give me a call. And Myra, could I ask you to wrap us up?

CTVG Views

In The Room with CTVG

Presentation



Myra Kressner

Closing Thoughts

Sure. Thank you. I'll do this very quickly. First Ed, thank you for your excellent facilitation. Thank you to Cameron and Rob. Thank you to our Ally Supporters Abierto, GK, Invenco and Rovers town. We really appreciate your support and participation.

I do have some really exciting news to share. All of you probably know Robert Hampton, a former CTVG member and formerly with Jackson's.

Eva, Roy and I are really pleased that Robert is now going to be part of the VGN team, and his title is Director of Strategic Growth and Initiatives. So we've had some really exciting conversations with Robert including plans for a virtual VGN summit with all of our VGN groups coming up in November. So you'll have an opportunity to spend some time with our Convenience Foodservice, Connexus, Global, Convenience Leaders and EV group members. And Robert is going to be spearheading that. We'll send the save the date soon.

And then we've got another Vision Group that Robert's also working on. So we are really pleased. I asked him, "Are you okay if I tell the CTVG members?" And he said, "Absolutely." So I'm sure he would be glad to hear from you if you want to congratulate him at robert.hampton@vgnsharing.com.

At any rate you will see a press release shortly and we just wanted to let everyone know. Eva, Roy, anything else that you want to add?

Eva Strasburger

We're excited about the changes, especially about the summit that will be virtual, and having everybody give a summary of what their big takeaways were from all these meetings and present it to each group is going to be very interesting.

Myra Kressner

So we are just about at the top of the hour. I'll again say thank you to all of our members. Obviously, we wouldn't have this without you. This was a great meeting, very good conversation. And I'll hand it back to Ed.

Ed Collupy

Have a great weekend that's upon us and thanks for being with us. Really appreciate it.

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Presentation



Prepared for CTVG Group
March 7, 2025

Operational & Consumer Feedback

Foodservice & Trends

CTVG

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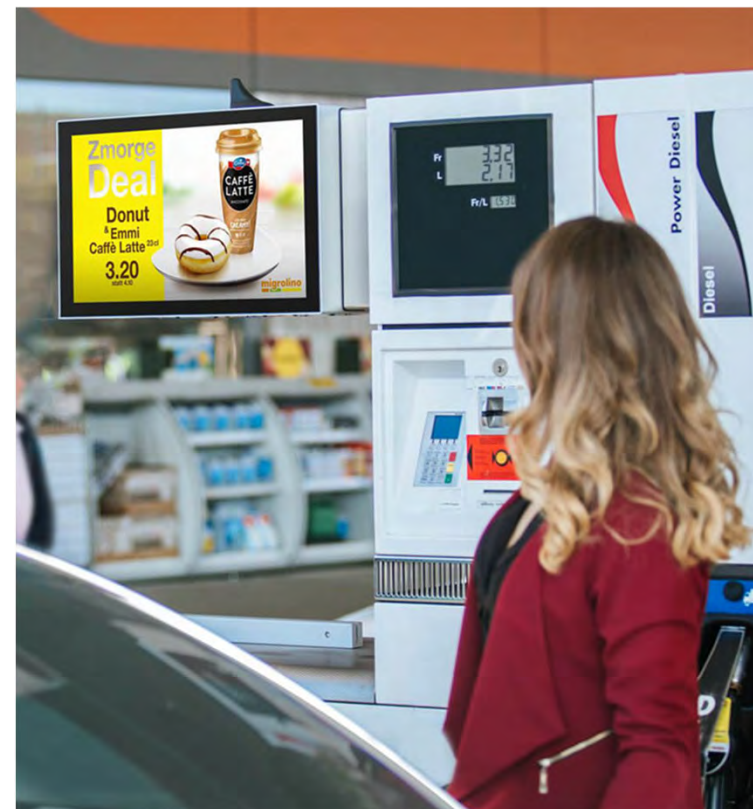
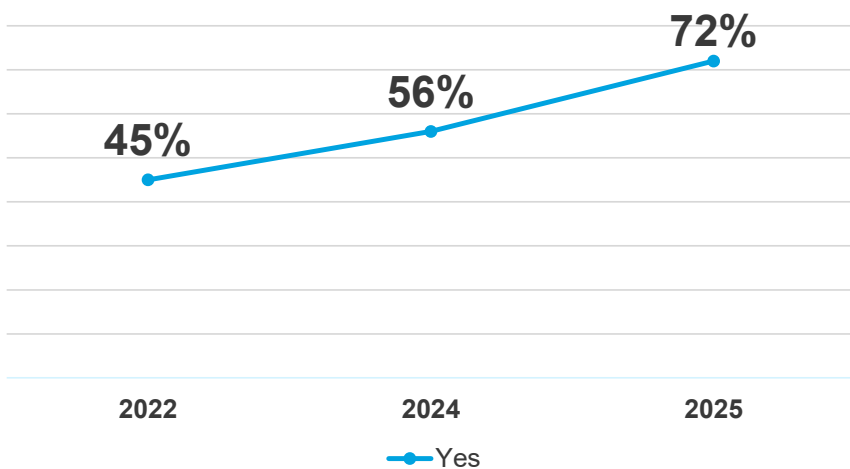
CTVG Views

In The Room with CTVG

 Presentation



With the evolution of *improved food options* at convenience stores, do you see convenience stores as an option for food over a quick service restaurant?



2022, n=1209, 2024, n=1204, 2025, n=1546

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Presentation



When purchasing made-to-order **food** from a convenience store, *where do you usually eat it?*

	2023	2024	2025
In car (while driving)	44%	49%	38%
In car (while parked)	32%	22%	27%
At destination	21%	18%	22%
In store	3%	5%	11%
Other		7%	3%

Consumer habits appear to be shifting with **6% more people reporting eating in-store**, while enjoying their food while driving dropped by 11%.

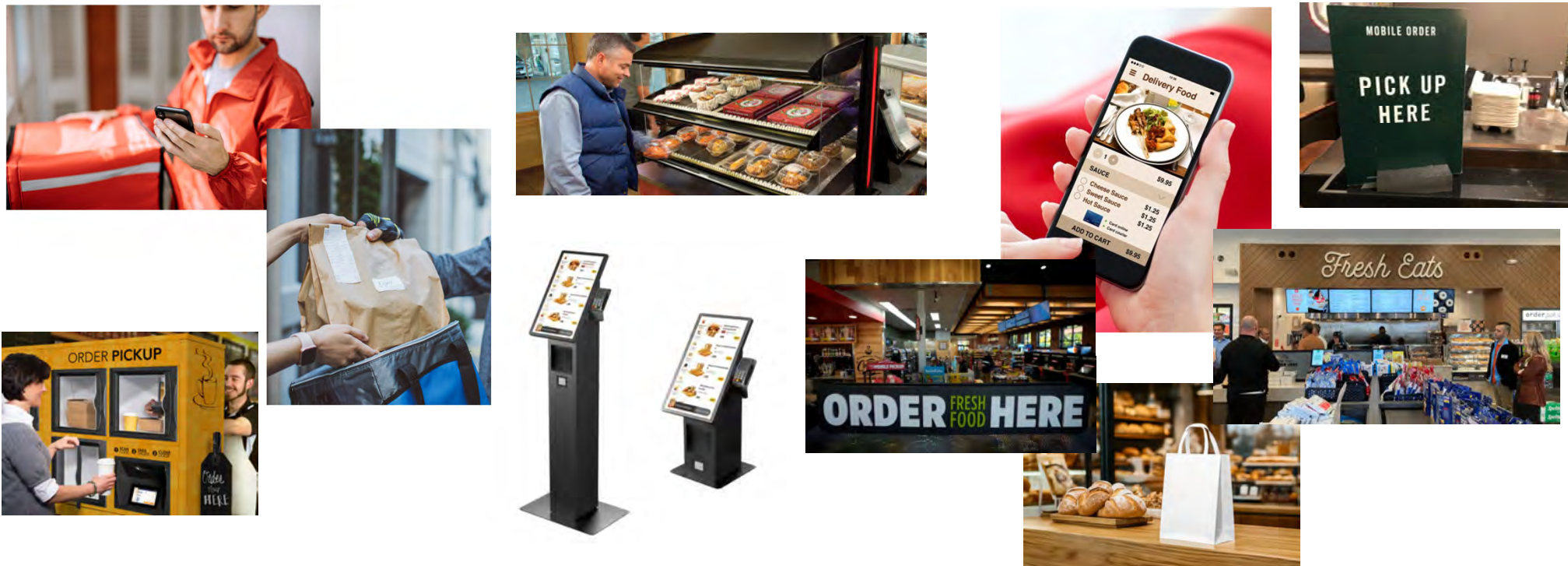
2023 n = 1204, 2024 n=1204, 2025 n=1546

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Consumer Journeys are changing.



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 Presentation



Key Findings – 3rd Party Delivery

	Average Delivery Time	Order Accuracy	Ease of Use of the App	Ability to Customize	Overall Satisfaction
C-Store	32 minutes 41 seconds	77%	94%	45%	80%
Restaurant	33 minutes 24 seconds	90%	98%	93%	91%

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Presentation



How long is **too long**?



Orders where the shopper was satisfied arrived **10 minutes and 12 seconds faster** than those who were not satisfied.

Average delivery time when shoppers were:

Satisfied: 31 minutes and 34 seconds

Not Satisfied: 41 minutes and 46 seconds

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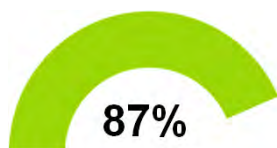


Food Temperature

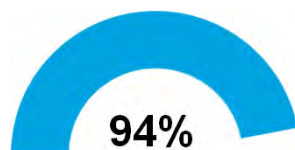
THIRD-PARTY DELIVERY



Convenience
Stores



Restaurants



Food **delivered at the correct temperature** arrived, on average, **9 minutes and 52 seconds faster** than food delivered at the incorrect temperature.

Average Delivery Times

Food at correct
temperature:

32 minutes and
7 seconds

Food at incorrect
temperature:

41 minutes and
59 seconds

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Speed of Service

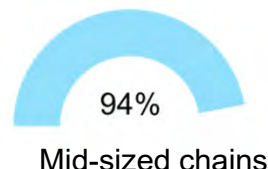
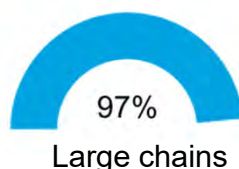
PIZZA STUDY – CARRYOUT



Average Carryout Order Time

Large-chains	16 minutes and 36 seconds
Mid-sized chains	17 minutes and 18 seconds
C-stores	20 minutes and 3 seconds

Satisfaction with Speed of Service



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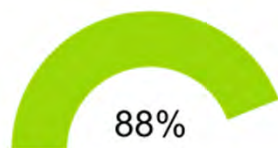
Presentation



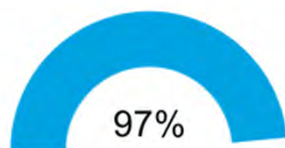
Accuracy & Temperature

PIZZA STUDY - CARRYOUT

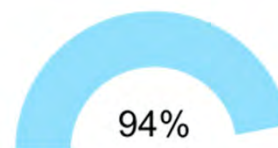
Order Accuracy



C-store



Large chains

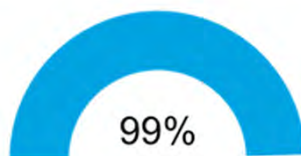


Mid-sized chains

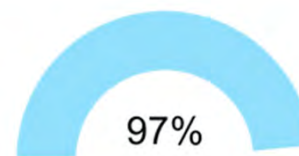
Food Temperature



C-store



Large chains



Mid-sized chains



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Presentation



More than four out of five Americans like using self-service kiosks and 66% said that they prefer it over a manned checkout.

Kiosks

PROS: Order accuracy was 5% higher for innovation experiences, coming in at 97% for kiosk orders, compared to orders placed at the counter.

CONS: Orders placed at the counter directly with an employee were on average almost one minute faster than orders placed at a kiosk for **total time**.

Innovation

9 minutes and
41 seconds

Legacy

8 minutes and
38 seconds



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 Presentation

Satisfaction with the Level of Service:

Satisfaction	Innovation	Legacy
Order Experience	93%	89%
Pickup Experience	98%	93%
Overall Satisfaction	95%	94%

Scores were *higher* for the *kiosk experience* at both the brands we evaluated compared to the legacy ordering experience, as well as *satisfaction with all parts of the experience*.

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Presentation

The Devil's in the Details

Insights from the field: What a shopper had to say.

“The kiosks are located in the front of the store, and the sun makes it super difficult to see the kiosk screens.”



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Mobile Order for Drive-Thru Pickup

PROS: Order accuracy was 11% higher at the innovation experience.

By moving the ordering process out of the drive-thru to a digital experience, the time customers spent in the drive-thru was **reduced by 2 minutes and 13 seconds, on average.**

CONS: 64% of orders were ready **after** the projected pickup time.

47% of U.S. consumers would simply avoid going to a restaurant that doesn't have a drive-thru.



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Physical spaces can pose challenges

Insights from the field: What a shopper had to say.

“My order was likely ready on time, but because I was in line behind someone who had just placed an order at the speaker, I was unable to reach the window until six minutes past the projected time.”



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Satisfaction with the Level of Service:

Satisfaction	Innovation	Legacy
Order Experience	91%	95%
Pickup Experience	88%	92%
Overall Satisfaction	92%	87%

Overall satisfaction was 5 % higher at the innovation experiences compared to the legacy experiences.

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Drive-Thru Order at New Restaurant Prototype

PROS: All three innovation experiences scored 100% when shoppers were asked if the interaction via the speaker was clear and understandable.

CONS: Drive-thru orders at the innovation locations were over **one minute longer** on average than the legacy locations.

Innovation

6 minutes and
04 seconds

Legacy

4 minutes and
50 seconds

It is estimated that Americans visit drive-thru lanes around 6 billion times each year.



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How important is speaker quality?

Orders were:



15%
MORE
ACCURATE

When the **speaker was clear and understandable**, compared to when it was not.



12%
MORE
ACCURATE

When the **speaker volume was loud enough to hear**, compared to when it was not.



7%
MORE
ACCURATE

When the **shopper did not have to repeat their order**, compared to when they did.



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Satisfaction with the Level of Service:

Satisfaction	Innovation	Legacy
Order Experience	94%	93%
Pickup Experience	90%	94%
Overall Satisfaction	91%	93%

*Overall satisfaction was 2 % lower at the **innovation experiences** compared to the legacy experiences.*

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Mobile Order for Pickup at Locker/Window

PROS: The innovation experiences were, on average, **2 minutes and 22 seconds faster** than the legacy experiences.

Innovation experiences were able to get **more orders out ahead, or at the projected pickup times.**

CONS: App malfunctions or poor signage indicating where to locate the lockers leads to frustration and unwanted interactions.

Almost half of all consumers prefer to pick up their restaurant orders themselves instead of having them delivered.



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Satisfaction with the Level of Service:

Satisfaction	Innovation	Legacy
Order Experience	98%	98%
Pickup Experience	97%	88%
Overall Satisfaction	97%	90%

Customers at the *Innovation Experiences* were *more satisfied* with the process, resulting in *7% higher overall satisfaction* compared to Legacy Experiences.

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Foodservice TechTrends & Opportunities Convenience & Foodservice



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EVERYBODY EATS



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international food & beverage
technology association

community

neighborhoods • chapters • partnerships

resources

exchange • guidance • knowledgebase

education

certification • research • webinars

networking

events • gatherings • connections

gather. learn. share **ifbta.org**

F&B's Technology Connector



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Lodging

- Hotels
 - Budget
 - Business
 - Convention
 - Family
 - Luxury
 - Historic
- Resorts
- Independents
- Cruise Ships
- Gaming/Casino

Foodservice

- Restaurants
 - QSR
 - Fast Casual
 - Casual
 - Luxury Casual
 - Full Service
- Fine Dining
- Family
- Pizza
- Sandwich Shops
- Pub
- On-site
 - Colleges & Universities
 - Business & Industry
 - Stadiums & Arenas
- Cruise Ships
- Gaming/Casino
- Travel
 - Airports
 - Travel Plazas

Retail

- C-Store
- Grocery
- On-site
 - Colleges & Universities
 - Business & Industry
 - Stadiums & Arenas
- Cruise Ships
- Gaming/Casino
- Travel
 - Airports
 - Travel Plazas

Reach & TouchPoints

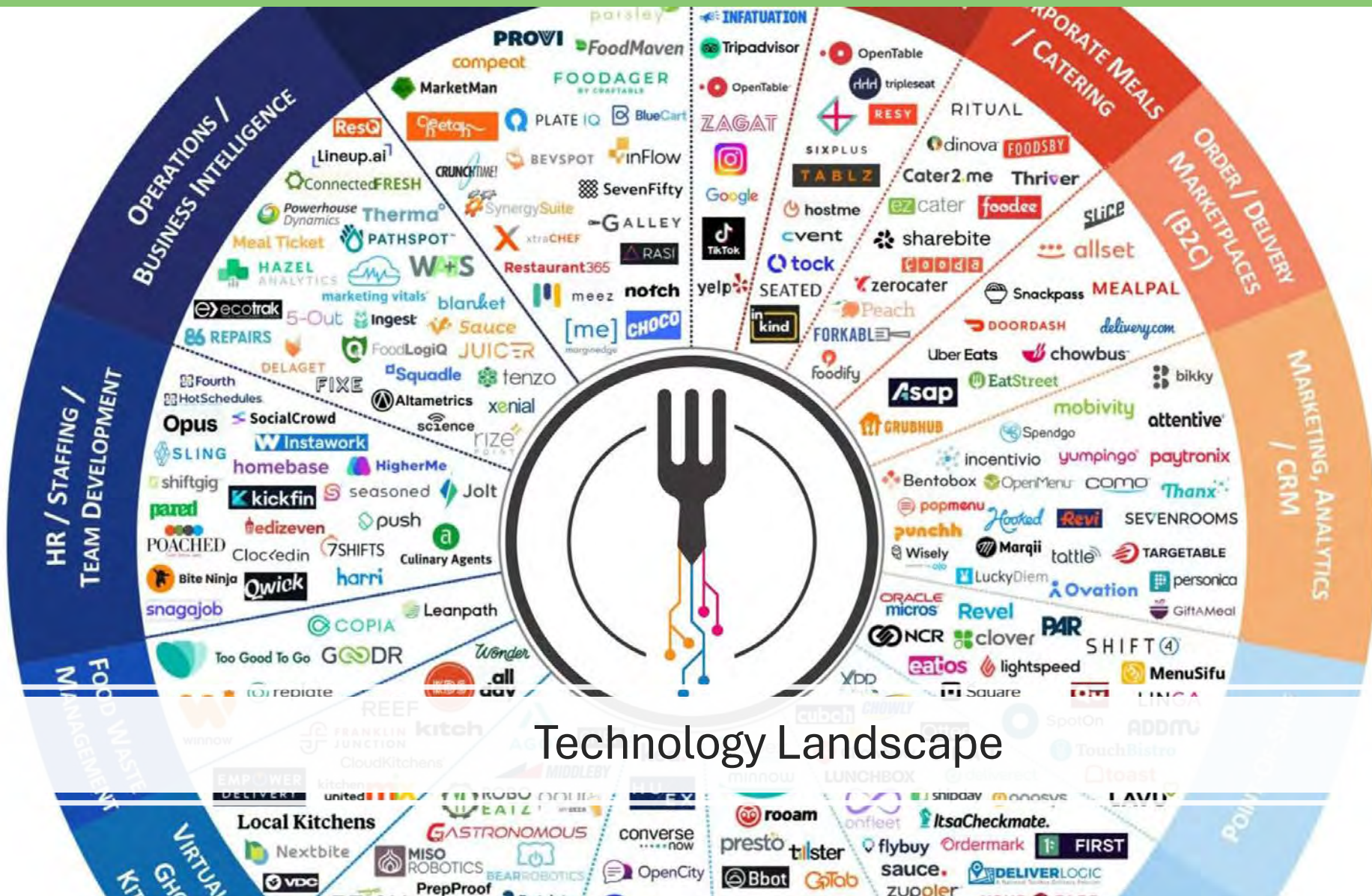


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Technology Landscape



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Foodservice TechTrends

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Learnings, Thoughts & Commentary



- Foodservice Options; Retail
- Consumer Journey (TouchPoints); Drive-Thru, Pickup & Delivery
- Considerations: Food Quality, Accuracy & Temperature & Speed-of-Service
- Technology; Mobile Ordering, Kiosks & Lockers

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Conversation Topics Terms & Technologies

Digital
Omni Channel
Platform
Personalization
Frictionless

AI
Robotics
Voice
Mobility
Delivery
Payments
Vending
Connected



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Influencers

- Consumers ● Military ● Education ● Healthcare ●

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Family

- Food • Travel • Lodging • Retail •

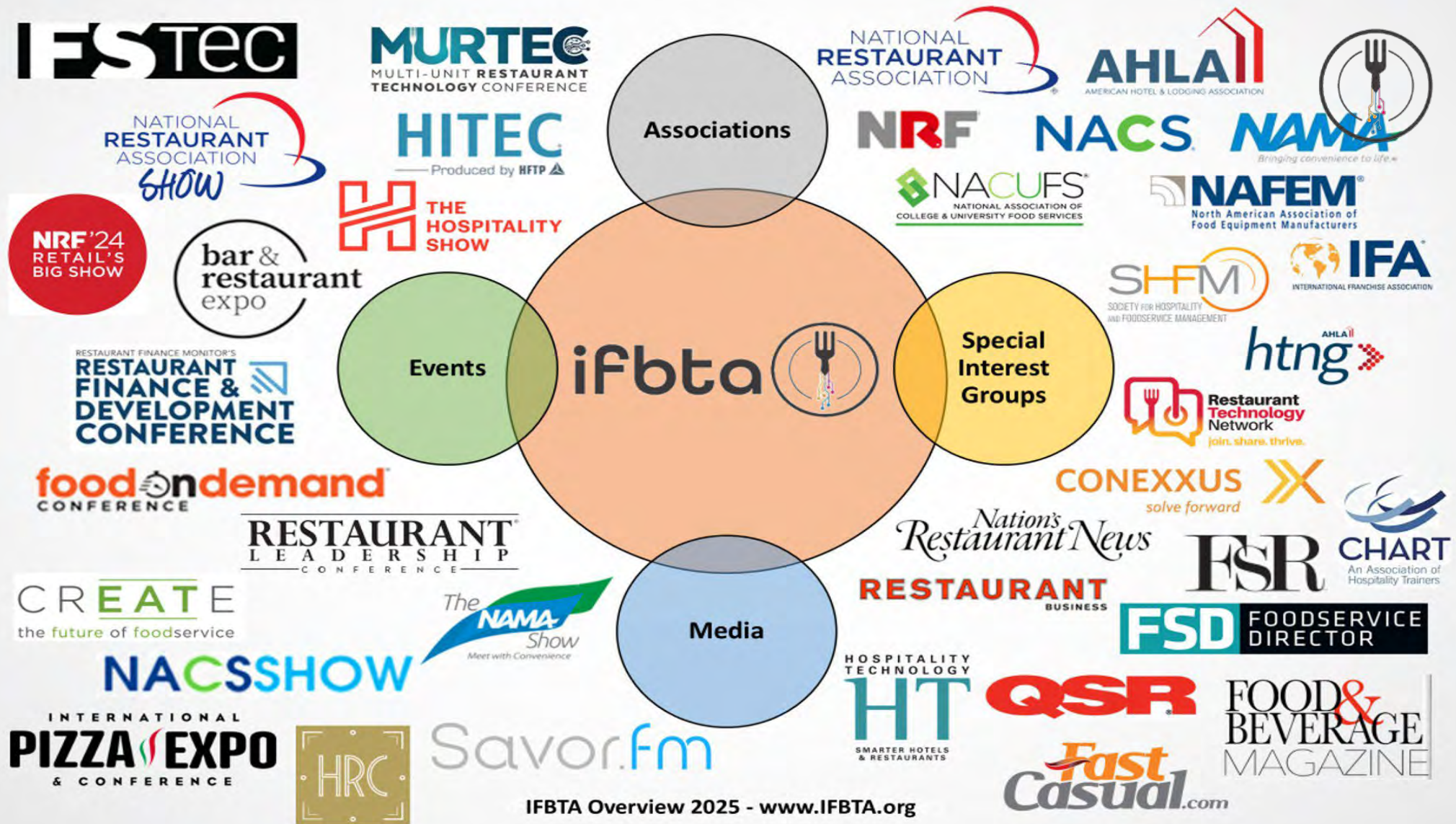


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Foodservice & C-Store



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Leveraging Foodservice Core Technologies

- POS
- Back-Office
- Digital Menu Boards
- Drive Thru
- Online Ordering
- Delivery
- Catering
- Loyalty
- Integration
- Standards



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TechTrends Tomorrow

Roadmap; Today to “Infinity & Beyond”

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FutureTech

- Robotics & Smart Equipment
- Customer Facing & Interactive
- Immersive & Experiential
- Connected EcoSystems

Infrastructure – Operations – Food - Cooking



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Continue the Conversation



Join the Community

education

certification • research • webinars

networking

events • gatherings • connections

community

channels • chapters • partnerships

resources

exchange • guidance • knowledgebase



international food & beverage technology association

Rob Grimes

President & CEO



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The Convenience Technology Vision Group (CTVG) brings together convenience technology leaders for quarterly virtual meetings. The group addresses trends, challenges and disruptions and solutions in AI, computer vision, alternative payments, robotics, IoT, blockchain, cybersecurity, data analysis, EVs, food tech, frictionless checkout, digital experiences, workforce management and more. The group is committed to sharing its views and perspectives to advance the convenience retailing and mobility industry. CTVG operates under the Vision Group Network, which gathers the collective knowledge and ideas of its members to create a legacy of sharing within the retail community. For more information and to sign up for future Vision Reports, visit our website: vgnsharing.com/vision-report-library



A part of Vision Group Network

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The Power of Sensory Science in Convenience Retail

February 2025

Creating a multisensory brand experience on a budget; ensuring food quality in an omnichannel world; creating a cohesive sensory experience; overcoming blind spots in customer experience; and contains small operator sensory guide



Lead the Future: Transformative AI Strategies

March 2025

AI race in retail, start smart and scale fast, AI runs on smart data, automate but don't replace, powering up for AI's impact

Expecting the Unexpected: Foreseeing Potential Disruptions

November 2024

Challenges facing the convenience retailing industry including emergency preparedness, cybersecurity, preparing for unrest, supply chain disruption and the next pandemic, appetite-suppressive drugs

Near and Far: Looking at Global Convenience Retailing

August 2024

Trends and innovation in global convenience retailing and mobility

Envisioning Sustainability in Convenience Store Design

May 2024

A Balancing Act for Sustainability vs. ROI, the 80/20 Rule and Customer Opinion, telling the Sustainability Story and Greenwashing

Making the Convenience Industry an Employer of Choice

February 2024

Expanding the persuadable applicant pool; onboarding, engagement, and training; cleaning up industry image; recruitment and retention; strategies; mental health support and kindness campaigns

AI: Predictive Fuel and Dynamic In-Store Pricing

December 2023

Examining AI fuel and product pricing potential.

AI: Dawning of a New Era in Retail Analytics

June 2023

The dawning of a new era in analytics as generative AI evolves, generative AI in simple terms; how AI is quickening the pace of business today; A micro perspective of AI at TXB stores; personalization through AI

The Business Case for EV Charging: Is It for You?

March 2023

The pace of EV adoption; c-store operators' views of the EV-charging customer; three pathways of EV retailing; a micro case study

Currents of Change

January 2023

Changing work schedules and the gig economy; foodservice tipping in the convenience segment; alternative fuels and the timeframe for electric vehicles



Pivotal Moments for Convenience Foodservice Technology

April 2025

The outlook for foodservice technology: operational and consumer feedback and tech trends and opportunities; opportunities and obstacles: integration challenges, understanding consumer expectations, new innovations, and enhancing efficiency; streamlining the food-to-customer pipeline: mobile ordering and kiosks, drive-thru, and delivery; and CTVG lightning round: cybersecurity review

Cybersecurity: Evolving Trends and Pitfalls

January 2025

Human risk management and training, vendor and third-party risks, industry-specific challenges and solutions, open source code, small operator challenge

Technology ABC & D's: AI, Barcodes, Convenience & Data

October 2024

Overviews of Sunrise 2027, the transition from UPC to 2D barcodes, results from a retail executive survey on AI

Retail Media Networks: More Than Meets the Eye

July 2024

Customer experience matters, small operators considerations, resource complexities

Fighting for Tomorrow's Customers

April 2024

What it means to fight for customers, reflecting on winning the "fuel" customer, reliance on 3rd party technology, data analytics, loyalty, and payments

Generative AI and Retailing: Real Results and Real Challenges

January 2024

AI and data integrity, how retailers are currently using AI and what's next for AI in convenience retail?

In Focus: A CTVG Conversation with POS Solution Providers

November 2023

POS decoupling; major oil companies; foodservice as the future; the unique needs of independent operators; integration challenges

To the Point: The Evolving State of POS in Convenience Retail

September 2023

EV Infrastructure and Strategy Updates and POS Systems Challenges and Opportunities.

Unraveling the Road to EV Charging Infrastructure

July 2023

Explosive EV growth; the role of utility companies; government funding programs; operators moving forward

Tech Trailblazing

May 2023

Debating the AI hype, tech as it relates to shift flexibility, and the breaking point on data collection



The Changing EV Policy Landscape: How Does It Affect You?

March 2025

The future of electric vehicles and charging, Trump 2.0 policy and funding reallocation, market growth and consumer adoption, economics of ev charging and convenience stores, ev charging infrastructure and development

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The ripple effect of U.S. elections on EV sector growth, The Musk factor, state and local Umbridge, EV tax credits, NEVI and infrastructure investment incentives, balancing public and private investment



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Global voices, unified challenges; unlocking the potential of physical AI in foodservice; AI integration in convenience and retail; automation's role in consumer experience and business strategy; and balancing automation and human connection



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Journey to Become an Employer of Choice; Expanding the Applicant Pool; Retaining Employees Though; Skill Growth; A Post-COVID Reality



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