CONEXXUS VISION GROUP

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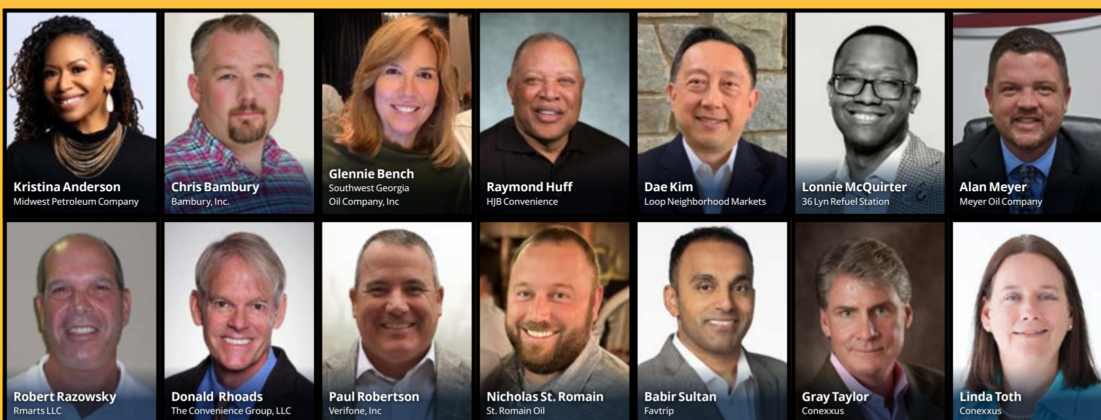
Third-Party Delivery: A Double-Edged Sword?

CxVG VISION REPORT NO. 2
MARCH 2025

CXVG MEMBERS



VISION GROUP NETWORK CO-FOUNDERS

FACILITATOR

James Maxey
Industry Expert, Trinity University

FEATURED SPEAKER

Jeff Keune
Principal Consultant, 4910 Consulting LLC

VISION GROUP NETWORK

sharing **today** to shape **tomorrow**

We are Conexxus Vision Group (CxVG), a group of invited technology 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" — our mission is to expand Conexxus' retailer and supplier engagement and amplify Conexxus' goals and achievements. We make our conversations available to everyone in the industry through CxVG 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.

Conexxus 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.

Unlike the previous Conexxus Vision Group virtual meeting, this hybrid meeting was conducted onsite at the 2025 Conexxus Annual Conference and live-streamed via Microsoft Teams.

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

CxVG 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 CxVG 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 that were given are included and linked throughout the transcript for easy navigation.

We highly recommend that you read all three components.

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The main topics in this CxVG Vision Report:

- Exploring Third-Party Delivery
- Consumer Appeal
- Marketing and Loyalty Strategies
- Lightning Round
- Recap: National Retail Federation's 2025 Big Show

PRESENTATIONS

CxVG thanks our **Ally Supporters**

Verifone is the payments architect shaping ecosystems for in-person and online commerce experiences, including everything businesses need – from secure, reliable payment devices to intuitive POS systems tailored for convenience retailers. Our suite of solutions includes eCommerce tools, payment services, site management tools, POS and payment applications, advanced business insights and much more.

As a global FinTech leader, Verifone powers omni-commerce growth for companies in over 165 countries and is trusted by top global brands, leading convenience retail chains, major oil companies, financial institutions and small businesses alike. The Verifone platform is built on a four-decade history of innovation and uncompromised security, annually managing more than 14B transactions worth over $500B on physical and digital channels.

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SUPPORTER SPOTLIGHT

Futureproof your POS solutions. As technology evolves, having the right tools is key. The Verifone C18 delivers speed, flexibility and a seamless experience for both cashiers and customers.
Learn more: www3.verifone.com/save-1500-off-your-c18

Compliance issues can make or break your business, but Compliance Safe ensures that never happens. This powerful document management solution helps retailers track, manage, and protect critical compliance documents, keeping your store open and preventing costly disruptions.

Compliance Safe was designed by industry experts who understand the frustration of misplaced paperwork and missed deadlines. Launched in late 2019, it has quickly become a retailer-preferred compliance tool.

Compliance Safe provides secure, cloud-based storage, allowing you to easily add, store, and track essential records like tobacco, alcohol, and food service permits, occupancy permits, certifications,insurance policies, and tax forms. With 24/7 access from any device, you can manage your documents anywhere, anytime.

Automated email notifications keep you proactive, ensuring you never miss a deadline. Effortlessly share documents with team members or third parties, staying aligned and compliant. The user-friendly design features intuitive dashboards for real-time tracking. Plus, affordable plans start at just $10 per month per store.

Stay Protected, Stay Open: Don't let compliance issues shut you down. Choose Compliance Safe for peace of mind!

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SUPPORTER SPOTLIGHT

As a retailer, you need to make sure that your staff and facilities exceed all of the required health standards. Most important is to ensure that your staff's food safety training and health certificates are up to date. Compliance Safe is an inexpensive and reliable way to know when certificates need to be renewed and to be able to access them on demand. Food safety is a serious matter and Compliance Safe helps you keep your customers safe. Visit us at ComplianceSafe.com to learn more.

CxVG VIEWS

A CONEXXUS VISION GROUP DISCUSSION

The CxVG quarterly meeting on January 28, 2025, held both virtually and in-person at the Conexxus Annual Conference in Tucson, Arizona, covered a range of topics, including the integration of foodservice into store operations, the complexities of online ordering and third-party delivery, customer expectations, the role of loyalty programs, and the future of foodservice technology.

Exploring Third-Party Delivery

Introducing the day's topic of third-party delivery, Facilitator **James Maxey**, an industry technology expert and Trinity University faculty member, set the stage with information about popular third-party delivery service usage. Looking at the delivery service user base, Maxey highlighted that roughly 69% and 64% of 13-28 year olds (Gen Z) and 29-44 year olds (Millennials), respectively, use delivery apps with much lower usage by older age groups. Joking that 13-year-olds probably wouldn't be using these apps, he was surprised by several CxVG members in attendance whose teens use them regularly.

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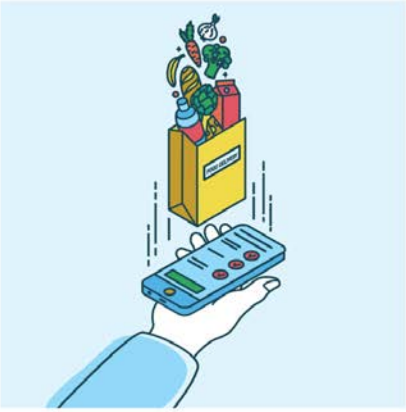
Maxey shared that 40% of Gen Z and Millennials use food delivery apps at least once a week. He also explored the market share percentages of the three most popular national services: DoorDash (67%), Uber Eats (25%) and Grubhub (8%). DoorDash leads the pack in both users and profit. In 2023, 37 million people used DoorDash, generating $8.63 billion in revenue with only minor losses. Detailed data is included on the slides at the end of this report.

Jeff Keune, principal consultant at 4910 Consulting LLC, was invited to present a case study on third-party delivery from his most recent role at fast casual restaurant, American Natural, based in Pittsburgh, Pennsylvania. American Natural is a 6-store convenience retailer specializing in healthy food options, coffee, plant-based merchandise and fuel.

Keune revitalized the struggling brand by aligning it with fast-casual trends. He streamlined the menu, introduced popular items, and partnered with local suppliers like Mediterra Bakehouse and Steel Cup Coffee. His goal was to appeal to convenience store customers of all income levels by offering better food at competitive prices.

He highlighted his company's improved efficiency in reducing waste, optimizing promotions, and implementing the iOrder system for seamless ordering. He also leveraged DoorDash to drive consistent online orders.

Foodservice, Party of Three?



The profitability of third-party delivery services and the technology behind order processing generated a lot of questions and sharing of current solutions. **Roy Strasburger**, CEO of StrasGlobal, president of Compliance Safe, and Vision Group Network co-founder, asked if American Natural's business model was sustainable long-term. Keune responded optimistically, stating, "Yes, I think it's sustainable, and I think it's only going to grow. The consumer is more engaged with online delivery, not less."

When discussing concerns about delivery platforms increasing their service fees and how that might impact retailers, **Kristina Anderson**, chief service officer, Midwest Petroleum Company, posited that younger generations were accustomed to online ordering and unlikely to be deterred by higher costs. "These generations are used to everything being online, and I honestly do not believe that incremental price increase will change set-in behaviors because we're training a whole generation of people to search online first," she remarked.

Director of Operations at 36 Lyn Refuel Station **Lonnie McQuirter** agreed about the service fees, pointing out the challenge of third-party platforms taking significant commissions, stating, "You're already giving 20% of your top-line to DoorDash. And you're adding up 4 or 5 points with Vroom." The discussion underscored the trade-offs between visibility on major platforms and the impact on profitability.

Integration with existing systems was also a concern. McQuirter would like to have the ability to integrate third-party ordering with his point-of-sale (POS) system to streamline operations.

Anderson agreed, stating that such integration would simplify tracking and reporting.

Continuing on integration, **Gray Taylor**, executive director of Conexxus, asked Keune whether online orders were integrated with kitchen systems or merely sent as messages. Keune confirmed that orders were received through individual provider tablets, requiring staff to monitor multiple devices. This led Anderson to question whether managing three different platforms caused confusion among employees. Keune acknowledged the difficulties but noted that their approach was to staff kitchens with enough employees to monitor the tablets, ensuring orders were fulfilled. While acknowledging the inefficiency, Keune justified the complexity by pointing out that third-party delivery contributed an incremental 3-5% to weekly sales.

> “We asked, “How do I manage to this complexity?” versus, “How do I simplify it to the point where I’m eliminating either ChowNow or Uber Eats, and just have DoorDash?” We felt like there was enough business there, and we could manage within a certain labor guideline and a certain complexity, that the incrementality was paying for that complexity.
>
> ***Jeff Keune**, Principal Consultant, 4910 Consulting LLC*

Eva Strasburger, president of StrasGlobal, CEO of Compliance Safe, and Vision Group Network co-founder, cited operational challenges of third-party delivery, recalling early struggles with her staff forgetting to charge order tablets or missing notifications. “People couldn’t find where the tablet had been put, the tablet hadn’t been charged, and there was nothing worse than coming in the next day and finding three orders sitting on there. Or you got really busy and they would pause it and forget to turn it back on,” she shared.

Taylor proposed a future scenario in which voice-activated ordering through car dashboards could transform the industry. He said: “You’re going to ask Google [or] ask Apple, ‘I would like a smashburger. Where do I go and get it?’ And it’s going to say:, ‘Up ahead, there are two places; one’s right turn in, right turn out, the other one’s left turn, left turn, it’s on your left. Which one do you want to work from?’ Now you can order from the easiest location, you’re doing it all via voice and now it’s all curbside delivery.” This led to a discussion on how convenience stores might position themselves to capture sales from customers making on-the-go decisions.

Alan Meyer, CEO of Meyer Oil Company and **Chris Bambury**, president of Bambury, Inc., shared their experiences with the Vroom platform. Meyer noted that his company had successfully integrated Vroom with their loyalty program, but the success depended on volume. “We have Little Caesars at the places that we have Vroom, and then we’ve got our proprietary label. A lot of our Vroom sales are tobacco, which is already a low-margin item. We’ve got it right now at four stores, and I think we’re going to continue to build it out, but I don’t think it’s going to be a major source of profit for us,” Meyer explained.

Bambury added that while terminating Vroom offered his company the potential for cost savings, they had to weigh the benefits of being on a major marketplace versus trying to build their own delivery infrastructure. “So you pay a premium to be on their marketplace, but if you’re willing to do your own app, your own marketing, you can just use their drivers. That’s a way to save, but it’s a trade-off because they have a lot of eyeballs on their platforms,” he noted.

Several members talked about examples of technology they witnessed at the recent NRF convention, but lamented that none were convenience-store specific. Taylor noted that Conexxus has an active Foodservice Working Group tackling standards creation for this.

To learn more about the **Conexxus Foodservice Working Group** and other Working Groups, visit **conexxus.org**.

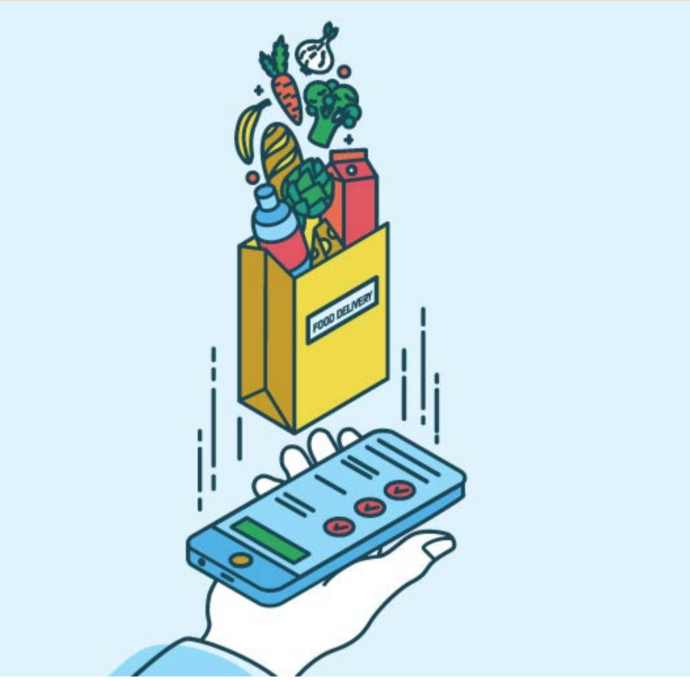
Consumer Appeal

Babir Sultan, president of Favtrip, was intrigued with how menu items were selected and tailored to the American Natural brand, expressing the challenge of ensuring that offerings felt unique rather than generic vendor-supplied products. Keune explained that American Natural conducted extensive data analysis to determine which items had broad appeal while also delivering strong margins. "If [we] had a sandwich on the menu that was a decent amount of sales, but we weren't making the money, that was something that we either changed or optimized out. It was the food evolution of the menu. And the innovation part of it was, how do you take this concept of simple but one better, and how do you build new products around that," he explained. Sultan agreed, adding that owning a menu's identity was key to differentiation.

The discussion then shifted to customer expectations for food freshness in delivery. Keune made an eye-opening remark that "the consumer didn't necessarily expect [their food] to be hot and fresh" due to delivery speed beyond their control. Anderson and Taylor agreed, with Taylor humorously adding, "It's going in the microwave when they get it, anyway." Anderson pointed out that consumers already factor in additional delivery time, meaning businesses should consider whether expensive heat-retaining packaging is necessary. Both suggested a practical alternative might be microwave-safe packaging and including reheating instructions directly on the container. Keune acknowledged this perspective, noting that assuming customers would reheat their meals themselves could be part of an effective delivery strategy.

Speaking of delivery time, Taylor wants integration to allow retailers to track drivers' GPS so stores can make the food when the driver is nearby. McQuirter tied that freshness to customer reviews noting that, "you'd want to space things out if you're preparing it, especially fries." He continued that "bad reviews are because drivers took their sweet time," but it is the store that takes the hit to their reputation.

> " I'm hearing a bunch of different things. I'm hearing, one, "Don't over-engineer it." I'm hearing, "We need to have standards." I heard twice, "We need to create convenience-store examples for our industry." It's great conversation.
>
> ***James Maxey***,
> *Industry Expert, Trinity University*



Marketing and Loyalty Strategies

Tom Bachrodt, regional manager at HJB Convenience and guest of CxVG member **Raymond Huff**, president of HJB Convenience, shifted gears to discuss marketing strategies, asking whether any particular type of social media had been especially effective for American Natural. Keune responded that while they used Facebook and then-known-as Twitter, Instagram proved to be the most successful platform due to its visual engagement. He also noted a strategic shift away from traditional TV advertising, opting instead to strengthen loyalty programs and in-store activations.

Citing the company's loyalty strategy, Eva Strasburger asked whether the company could determine if third-party orders came from new or existing customers. Keune admitted that while he would have loved to tie ordering data into the loyalty program, they lacked the technological integration to do so. "We did some data analysis looking at the individual loyalty users, and we felt like it trended toward their bigger purchases. They were bigger purchases. But we don't know if that was because of the things we were doing with loyalty or the fact that they were using the third-party delivery," he explained. Strasburger appreciated the insight, recognizing the challenge of tracking customer behavior across multiple platforms.

Loyalty program engagement was important to Keune at American Natural. "We had a goal of getting 30% of the consumers on the loyalty program. We did that," Keune said during his presentation. "We did that through messaging at the store level, but also team member activation. We had a team member sales contest, or actually a sign-up contest. The store that got to 30% first, the store manager got a trip to Florida."

Rob Razowsky, CEO of Rmarts LLC, related his stores' delivery experience, noting that in major metropolitan markets, people already have preferred quick-service restaurants, making it difficult and perplexing for convenience stores to break into the delivery space. He pointed out that DoorDash's biggest problem was low-value orders, with customers often purchasing only snacks and drinks rather than full meals. "We've tried DoorDash in a couple of locations. It seems like the hours that DoorDash was working were fringe hours when we had limited labor, and I don't think we got to $20 for an order," he shared.

Bachrodt mentioned, as a Boomer, he's still getting on board with DoorDash and that his is an untapped generation to market. Anderson said Instacart might be a key to that generation and to consider them as well.

The Future of Food in Convenience

The conversation wrapped up with Gray Taylor emphasizing the need for convenience stores to adapt and take foodservice seriously. “Foodservice, it’s our growth area. It’s where convenience has to go to justify some locations,” he said, underscoring the industry’s potential for strategic expansion.

Final Reflection

Foodservice is a must-have in convenience retail to counter dropping sales in traditional categories. Providing convenient access to food through online ordering and third-party delivery services is a complicated process. CxVG members recognize the need, and will continue to explore more efficient solutions, promote cross-industry standards, and explore the feasibility of creating proprietary delivery systems.

Review

LIGHTNING ROUND

Reflecting on topics from the inaugural CxVG meeting held in November 2024, **Lonnie McQuirter** noted that AI will simplify complex and costly processes, and will particularly benef "tiny" retail operations like his. **Babir Sultan** shared that he is leveraging AI for all of his user-generated content, surveillance analytics, and demographic insights. Sultan reinforced the idea that technology is now accessible to businesses of all sizes.

Echoing this perspective, **Don Rhoads**, president of The Convenience Group, LLC, stressed that small operators are still in the early stages of technological integration. He sees discovery and implementation as ongoing processes and hopes for more collaboration with groups like Conexxus to establish best practices and enhance customer experience.

McQuirter also highlighted the growing excitement around technology in the industry, emphasizing the need for practical applications rather than chasing new trends. He sees a major opportunity in integrating different technologies to make better business decisions and streamlining operations

Chris Bambury underscored the value of CxVG and similar peer share groups, particularly in the technical space, as a way to learn from others' experiences. **Robert Razowsky** agreed, noting that the last meeting provided valuable insights and opportunities to explore new ideas. Both appreciated the collaborative nature of the group and are eager for future CxVG meetings.

Kristina Anderson focused her update on the competitive challenges facing convenience stores, particularly the competition with dollar stores. She found reassurance in knowing that other retailers faced similar struggles and stressed the importance of improving efficiency. By doing so, she believes retailers can reinvest savings into capital development and strengthen the industry's position.

Download the CxVG inaugural meeting Vision Report, ***CxVG Envisioning Technology Innovation in the Convenience Store Future*** and follow ***CxVG on LinkedIn***.

Recap: National Retail Federation’s 2025 Big Show

Several CxVG members attended the January 2025 National Retail Federation Big Show annual convention and tradeshow. It was noted that AI dominated the event, with nearly every exhibitor showcasing AI-driven solutions. Several attendees commented on the show’s scale and energy. **Ed Collupy**, principal of Collupy System Solutions LLC and facilitator of Convenience Technology Vision Group (CTVG), described NRF as an “experience-driven show” and led a “Conexxus Booth Crawl” to explore different tech solutions. **Dae Kim**, advisor for Loop Neighborhood Markets, noted the rise of live-streaming from the show floor and the physical effort required to navigate the massive event, logging 26,000 steps in one day.

Collupy emphasized that while AI was a major theme, the real focus was on enhancing customer experiences. **Gray Taylor** and **Alan Meyer** discussed the AI-powered self-checkout advancements, particularly NCR Voyix Halo Checkout, which continuously learns from new product images to improve accuracy.

The growing role of food in retail was a key theme, too. Collupy highlighted robotics in food prep, including automated pizza-making and kiosk-based ordering with robotic fulfillment. **Myra Kressner**, president of Kressner Strategy Group and Vision Group Network co-founder, pointed out the relevance of foodservice technology innovations, a subject also being explored at an upcoming CTVG meeting, while Kim humorously mentioned Heinz’s AI-powered condiment dispenser as an example of over-engineered solutions.

An oft-lamented problem in retail is employee retention and engagement. At the show, Taylor and Kressner saw innovations like gamification platforms and influencer-driven brand advocacy. Taylor, however, emphasized that labor issues should be addressed by improving employee satisfaction rather than just automating jobs.

Paul Robertson, manager, partnerships and key initiatives for Verifone, Inc. said, “We introduced a working concept of biometrics. Being able to do all that face reading is going to lend itself to a lot of the things that I hear at this (Conexxus) conference so far about personalizing the experience in the store for retailers. I think these facial recognition tools are something that’s going to help us do a lot. I look forward to seeing that evolve.”

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NOTABLE AND QUOTABLE

"MasterCard did a study and said that 35% of people who are filling up at your gas island were on their way to a fast-food restaurant. The whole idea is, if you're seeing all these people drive by, you can capture them on the [car]dashboard.

***Gray Taylor,** Executive Director, Conexxus*

"You can partner up with DoorDash and some of these other deliveries, and as long as you're not on their marketplace, they'll give you a better rate for using their delivery system. So you pay a premium to be on their marketplace, but if you're willing to do your own app, your own marketing, you can just use their drivers. That's a way to save, but it's a trade-off because they have a lot of eyeballs on their platforms.

***Chris Bambury**, President, Bambury, Inc*

"Being in a major metro market, it seems like many people have their very favorite quick-service restaurants and go-to places whether it's for a hotdog, pizza or a sandwich. That's challenge number one. The second takeaway that I have from this whole conversation is most of us have a limited labor model, which restricts us. Labor continues to be a challenge to our industry from a standpoint of foodservice because if you're not doing volume, you can't support the labor...It's a catch-22 on so many fronts.

***Rob Razowsky**, CEO, Rmarts LLC*

"We also felt that the consumer didn't necessarily expect [their food] to be hot and fresh. We didn't really have much control over the time of the drivers. We did our best to make it certainly within the time that any consumer would expect to make it. But we didn't have the ability and we didn't invest in incremental packaging that would try and keep it hotter or fresher, knowing that it may sit for a while.

***Jeff Keune**, Principal Consultant, 4910 Consulting LLC*

"The perfect solution would be, as Gray said, to work with our POS system, and if there'd be some kind of data from the third party into the POS, then it'd simplify our tracking, it simplifies our reporting, all of those things.

***Kristina Anderson**, Chief Service Officer, Midwest Petroleum Company*

"We have a nontraditional store on the first floor of an apartment complex at the edge of Florida State University, and I'm amazed at the number of kids who order delivery. They're one floor above our store!

***Glennie Bench**, President, Southwest Georgia Oil Company, Inc*

NOTABLE AND QUOTABLE

“The funniest thing that I saw in the NRF Show foodservice technology area. Heinz had a little booth [with a] condiment dispenser that had AI technology. Basically it was, think of Coca-Cola's Freestyle machine for condiments. But the trick was you can blend ketchup, mustard and hot sauce.

***Dae Kim**, Advisor, Loop Neighborhood Markets*

“As a small operator, we continue to work through discovery and integration of technology, and I think it's really important that we understand that we're really in the first quarter of this game.

***Don Rhoads**, President, The Convenience Group, LLC*

“We have the very first NCR Halo self-checkout at a retail location in the entire country. We've been running that pilot for about six weeks now...One thing I'm excited for, once it gets out to market, is let's say all of us retailers use it and Hershey comes out with a new product. It can take the imaging from one of you guys' retail stores, upload that in the database, and then would know what that new product is before it would ever get into my store. That is the end goal of what they're hoping to accomplish. The imaging, the accuracy of it has been pretty unbelievable, so far.

***Alan Meyer**, CEO, Meyer Oil Company*

“I think that's a huge opportunity this year as retailers, to take all these different tools and all these side-by-side technologies and figure out how to coordinate them so we can make meaningful decisions and also properly manage them.

***Lonnie McQuirter**, Director of Operations, 36 Lyn Refuel Station*

“No matter the size of your company, I think we all could benefit from technology. It's not like you have to have 100 stores before somebody will speak to you, and it's getting cheaper by the day. It's not something you have to put together a $300,000 budget to start leveraging technology.

***Babir Sultan**, President, Favtrip*

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.

Myra Kressner
Vision Group Network Co-Founder

Our January 28th CxVG meeting talked about how common it is for college students to order their food online, surprising some Boomers. According to College Values Online website, Uber Eats, DoorDash, and Grubhub offer special student deals, especially during holidays or back-to-school seasons. Seamless and Grubhub are basically the same company, but Seamless has its own set of student discounts and promotions.

Visit College Values Online to see the **"Top Discounts On Meal Plans And Delivery For Online Students."**

James Maxey
Facilitator

During the meeting there were several things that surprised me since I have not historically used meal delivery outside of the occasional pizza. According to this survey by **YouGov**, understanding that 39% of people from the age of 13 – 44 use a food delivery app at least once per week is fascinating. This made me question the range where the ages started at 13. The age was quickly validated in the meeting and after. I asked my son who teaches at a middle school in the Houston area, and he said that students use meal delivery for lunch. We heard about Just Salad's AI in ***FastCompany*** where they make recommendations for your order based on your order history. What a great opportunity to enhance the customer experience and upselling and cross-selling the transaction. Then, I questioned what's next? One of the technology expectations is Augmented Reality in this article by ***Mindster***. Users will be able to see a 3D representation of the dish. Is someone working on the sense of smell, too? We can certainly expect robotic deliveries to grow where the DoorDash robot can carry up to 22 pounds. Drones can carry between 5 and 15 pounds. In both cases, delivery labor is no longer an issue. The last mile from kitchens or ghost kitchens (designed for delivery only) is somehow getting smaller, says ***Upper***. I can't wait to see what's next.

Roy Strasburger
Vision Group Network Co-Founder

The U.S. quick delivery market has seen a lot of changes in the last three years. Companies come and go, and service offers change as investors try to reduce costs and maximize profit opportunities. This article, **"Everything you need to know about US quick commerce"** by Nielsen IQ, published September 2024, gives a good overview of the current market and how the competition is evolving. There is also a separate analysis on how quick delivery companies using "dark stores" are hurt by reduced inventory options.

Eva Strasburger
Compliance Safe

In the meeting, Kristina Anderson said that she thinks that customers have lowered their quality expectations for food delivered by the quick delivery companies. Not only that, but it's guaranteed that you will have to reheat the food in the microwave when it arrives. This article, **"6 Food Safety Tips When Using Delivery App"** from AARP, will give the consumer guidelines on what to do when food is delivered to your home to stay safe.

Gray Taylor
Conexxus

Conexxus Retail Innovation Working Group (RIWG) is focusing innovations that improve the competitive position of our industry. Key concerns and opportunities generated by the **Conexxus Innovation Research Committee (IRC)**, a group of retail executives, are vetted for action and taken to this committee for technology solutions.

RIWG is committed to delivering actionable workflows, and work is currently underway on these key topics:

- Improving third party delivery service integration
- EV charger integration to store systems

James Maxey
CxVG Facilitator and Industry Expert, Trinity University

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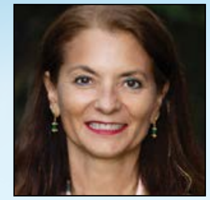
MEMBERS

VISION GROUP NETWORK CO-FOUNDERS

Myra Kressner
President, Kressner Strategy Group



Eva Strasburger
President, StrasGlobal; CEO, Compliance Safe

Roy Strasburger
CEO, StrasGlobal; President, Compliance Safe

Kristina Anderson
Chief Service Officer, Midwest Petroleum Company

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Dae Kim
Advisor, Loop Neighborhood Markets

Lonnie McQuirter
Director of Operations, 36 Lyn Refuel Station

Alan Meyer
CEO, Meyer Oil Company

Robert Razowsky
CEO, Rmarts LLC

Donald Rhoads
President, The Convenience Group, LLC

Paul Robertson
Manager, Partnerships & Key Initiatives, Verifone, Inc

Nicholas St. Romain
Co-CEO St. Romain Oil

Babir Sultan
President, Favtrip

Gray Taylor
Executive Director, Conexxus

Linda Toth
Managing Director, Conexxus

IN THE ROOM WITH CxVG

Conexxus Vision Group (CxVG) invites you to join us **In The Room** to experience our meeting on January 28, 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.

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CxVG Views | In The Room with CxVG | Presentations

Agenda

Topic Reference Key

CxVG'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.

- **Foodservice**
  - Menu Development
  - Foodservice Technology
- **Marketing**
  - Promotions
  - Loyalty Programs
- **Operations**
  - Strategy
- **Technology**
  - Biometrics
  - AI
  - Self-Checkout
  - Delivery
  - Data Analysis

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Welcome, Introductions, Meeting Rules

James Maxey

Welcome to our attendees in the room and those joining online. We need to start with the antitrust [antitrust statement appears on screen] and then I will follow up with the housekeeping. We've all seen this many times before: We are recording this session. It will be for publication. At any time if you have something that you don't want to publish, please mention it before your comments. Just say, "Hey, I realize that you want to publish this, but take this comment off the record." And then the standard antitrust thing. Let's not talk about anything that's competitive in nature. Fair enough? Fair enough.

Believe it or not, it's our second meeting. It just seems like yesterday that November 14th happened. November 14th was the date of our first meeting, and we have a couple of new members that we'd like to introduce today. We have a guest speaker, a gentleman that I've known for more years than either one of us cares to admit. Dae, why don't we start with you. If you could say who you are, who you represent, and if you have a favorite technology story that you can give 2 minutes or less, I would appreciate it.

Dae Kim

My name is Dae Kim. I'm with Loop Neighborhood Markets, a 130-store operator in Northern California, although we do have sites down in Southern California. Before that I spent some time at NACS with the industry data team and then I also spent some time at P97 working on mobile commerce. My favorite technology story is, it was about a few years, but Gray Taylor, he was at Conexxus and I was over at NACS, and we did a field trip to Microsoft headquarters and they couldn't get the power set up for our meeting. It's pretty common, right? When you're literally at Microsoft and they're having technology problems starting this out. So, it happens to everybody.

James Maxey

Thank you so much. Alan Meyer. I understand that you're attending virtually, so if you could do the same. I appreciate it.

Alan Meyer

I'm Alan Meyer, Meyer Oil Company. We're based out of central Illinois, basically halfway between Indianapolis and St. Louis. We've got 24 stores. I've been the CEO since 2017. I don't know if I have a favorite technology story. One thing we're currently doing, we have the very first NCR Halo self-checkout at a retail location in the entire country. We've been running that pilot for about six weeks now. It's been pretty exciting.

James Maxey Congratulations. It's hard to be the first.

Alan Meyer Yes. People tell me I love to be first.

James Maxey And you're still smiling.

Alan Meyer [Laughs] Yes. It's at a pretty slow store. So, it's been a little bit of trial and error, but support's been pretty amazing.

James Maxey Outstanding. I'd love to hear more about that when we have a moment. James Harvey of Verifone could not make it today, so Paul Robertson is here on site with us. Paul, if you wouldn't mind giving a quick introduction.

Paul Robertson Hi, everybody. I'm Paul Robertson. I've been with Verifone for about 25 years now. I'm currently here as a manager of partnerships and key initiatives. Key initiatives translate into product efforts as we come into the new world of technology. One technology story that comes to mind; a lot of my favorite is probably not appropriate for this room. [Laughter] One thing comes to mind though is at NRF Big Show (a National Retail Federation conference) a couple of weeks ago we introduced a working concept of biometrics.

Biometrics

Being able to do all that face reading is going to lend itself to a lot of the things that I hear at this conference (the Conexxus Annual Conference) so far about **personalizing the experience** in the store for retailers. I think these facial recognition tools are something that's going to help us do a lot. I look forward to seeing that evolve.

James Maxey Outstanding. We have a new member, Glennie Bench. Welcome. Please introduce yourself.

Glennie Bench I'm president of Southwest Georgia Oil Company. We operate 80, soon to be 81 SunStop convenience stores in Georgia, Florida, and Alabama. I've been with the company for 34 years. Came over from the finance side to the operations side about seven years ago. I'm happy to be part of the group. And my favorite technology story is finding out that Verifone is doing face and palm recognition. We've got 80 Verifone stores.

Paul Robertson I was in your offices doing the actual physical demo, by the way.

Glennie Bench Yes, absolutely.

James Maxey One of the topics of conversation is foodservice. I hear you have some great foodservice stores.

Glennie Bench We have the best foodservice, good southern home cooking food. You'd be amazed to know how many gizzards we sell. It's one of our top-sellers.

Gray Tayor Are they raw or are they cooked?

Glennie Bench Oh, they're definitely cooked.

Gray Taylor Well, they go well with catfish.

Glennie Bench That's right.

James Maxey Kristina Anderson tells me about her smashburger, so I'm going to have to put you on the list of people that do foodservice that I have to try.

Glennie Bench I need to talk to her about that.

Kristina Anderson We need a collaboration.

Glennie Bench Yes.

James Maxey And last but not least, we have Ed Collupy.

Ed Collupy Good morning, everybody, and thank you. I'm wearing a couple of hats as a guest of the meeting today. I'm here at Conexxus helping them out as their innovation facilitator and happy to be doing that with the Innovation Research Committee and the work that Conexxus does. But I'm also a facilitator for another one of the Vision Group Network groups called the Convenience Technology Vision Group. We're over 2 years old, rather than two months old, and we've had a lot of great conversation around the virtual table, so this is kind of unique and great to have some of us come together.

My favorite technology story is one where I was reminded this morning by Brian Mayfield of Techquidation. What he said to me this morning was kind of heartwarming for me when he said, "You won't believe that you have been an important part of who our company has become, because back in the day when I [Ed] was at The Pantry, you were one of the first companies that I [Brian] cold-called. You took our call and you met with us." And I said, "But I don't think we ever did any business." He said, "Probably along the way we did."

But I was reminded really of giving folks an opportunity. I think that's part of what the Innovation Research Committee does at Conexxus. It's what the Vision Groups are about, bringing people together and giving each other an opportunity

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to talk. It brought back a lot of other memories of where I gave somebody an opportunity that turned into a win-win. We often hear that term, but today with Brian's conversation, there are those opportunities to win-win with startups and with innovators.

James Maxey Perfect. Thank you so much. I also want to recognize Tom Bachrodt. I'm sorry, I almost missed you. Could you introduce yourself as well?

Tom Bachrodt My name is Tom Bachrodt. I work with HJB Convenience Corporation. Some of you may know Raymond Huff. This is my 38th year working with Ray. I oversee all of the marketing operations. I do a fair amount of leasing activity. We have eight stores primarily located in lobbies of office buildings in Denver, Los Angeles, Detroit, and Honolulu, Hawaii. If I had a good technology moment, it's been working hand-in-hand with Ray and the Tenderfoot Software people, developing our first self-serve concept, which was launched back in 2016. We have three of those stores right now, but going through all of the intricacies of making that program work, it's been a great process for me.

James Maxey Perfect. Thank you so much.

I'm going to share my screen.

Real quick, some CxVG housekeeping. Again, we're all being recorded. Please leave your camera on as much as you can. Please share as much as you can. I will be watching the raised-hand icon, and as soon as I see it, I will acknowledge you as quickly as I can. If you step away, just send me a quick note or just step away, whatever makes your heart happy. But come back as soon as you're available.

With that said, I want to reach out to our coordinators from Vision Group Network and Conexxus.
Gray, why don't you go first?

Gray Taylor Okay. At Conexxus, we do a lot of standards and standardization of architectures and so forth. That's the boring bits. That's what makes your store work. Our biggest drive right now is to hear from executives and committee members and let us know what your pain points are. We're not asking for you to tell us what to do and how to do it. What we're looking for is if you could tell us what it is, why it is, and how you would like to see at the end state. That allows us then to go back and work with Verifone and other folks through our team. And that's how we serve the industry. We're a nonprofit, and our charter is to make the industry more profitable by making sure that you're not paying for a lot of competitive integration.

So that's really what we see the value here is hearing those pain points and hopefully getting some user stories that we can go back and steal, if you will. Go back and actually create some solutions for it.

Roy Strasburger

To build on that, one of the goals that we have with the Conexxus Vision Group is to spread the word of the work that Conexxus is doing to the public. We want to get more retailers involved and give them an understanding of what Conexxus is doing and how they can benefit from Conexxus' work. Through the Vision Reports that we put together, and through your participation, we are trying to spread the gospel of the work that's being done here. Our mission statement is that we are sharing today to shape tomorrow, and we believe in the philosophy of a "rising tide lifts all boats." We think about making the industry, as a whole, better, and we have to do that by helping individual retailers. We appreciate your participation, and we're really excited about our first hybrid in-person and virtual meeting, which is going to be an annual function of the Conexxus Vision Group. We plan to have an in-person meeting at every annual conference.

Myra?

Myra Kressner

I'll just build on what Roy said. Since I have been here at the Conexxus annual meeting and have talked with more folks about the Conexxus Vision Group, and this is just our second meeting, there's still a lot of need to build awareness. We have an opportunity to let folks know about the Conexxus Vision Group and our collective mission. It's really been very rewarding to talk with both the retailers, and suppliers that would be potential Ally Supporters to participate, and there's some recognition of the value of this concept and interest in knowing more and participating in the future. So that's great to be able to share with everyone that's on the call.

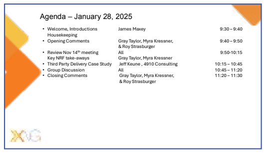
James Maxey

Perfect. Thank you so much. And Eva is on the line. Eva, is there anything you wanted to say?

Eva Strasburger

Thank you, everybody, and welcome.

Lightning Round



James Maxey

On the agenda today, we're going to talk about the quick review of the November 14th meeting. We have three people that are going to talk about the NRF conference, some great technology takeaways from there. Jeff Keune is going to give us a great case study. I've already seen the presentation. I'm really excited for you guys to hear a case study on foodservice and delivery. And then, closing comments. I'm a little bit nervous to be perfectly honest that we're going to have enough time. We have some great things to talk about, but I'm sure this group will get it done.

With that said, looking back to November 14th, one of the things that Gray said that impressed me is one of our goals is to envision and discuss technology. And I thought, "Wow, what a broad ask that is." But I can't think of a better challenging goal for the group of leaders that we have in the room today. And we talked about different things that were challenging.

As I look over at Kristina, she's at the top of my list of things. On the first call, she talked about some store level issues that she was having and just speaking with such passion, I think is the best word I can come up with. That really hits me in my heart because as an IT person, my focus was always on the store. The store had to come first because that's where the customers are, that's where we make our money. And corporate tech comes second. So, when she started talking, it was just music to my ears. She talked about some data simplification and some compliance pain points. So, thank you so much for that.

Nicholas spoke about foodservice integration.

We talked about AI—artificial intelligence. I don't think we can have a conversation in the industry without talking about AI. As we discussed in the first call, I'm a teacher at Trinity University. For those of you don't know, that are new, I was in the convenience-store industry for 28 years. I stepped away when [my chain was] purchased for the seventh time, and decided to teach at a local university. I now teach how to use AI in Excel so we can write macros, tell ChatGPT, "Hey, I'm going to write a macro that does this." And it writes a code for you. Copy, paste it, and you've got it. It just blows me away.

In fact, on Sunday morning, Myra sent me an article from a company called Just Salad which launched a feature called **Salad AI**.

They're using artificial intelligence to make recommendations for people's salad orders, whether it be vegan or protein choices or low sugars or whatever. They're **integrating people's lifestyles** into an app, so when they sign onto the app, it automatically says, "We think this is a good salad for you." Stuff like that just fascinates me, and it is just growing so fast.

We had several other topics that we discussed, but what I wanted to do is just go around the room and see if there were any other highlights that you had from our first session. Maybe Lonnie can start. Did you have any first impressions or things that just stuck with you during that first meeting?

Lonnie McQuirter That's a great question. It's an honor to be a part of this group, and there's a great roster of rock stars that are online and here in person. Just the sheer excitement about the tech space, which is something I think the convenience-store industry has been missing and lacking in some other groups. Some people look at it as shiny new objects and what's cool. Here, we're actually talking about practical applications that actually make a meaningful difference to both our customers trying to make salads, as well as those trying to figure out how to integrate all these systems into one where it makes sense for us. And really, I think that's a huge opportunity this year as retailers, to take all these different tools and all these side-by-side technologies and figure out how to coordinate them so we can make meaningful decisions and also properly manage them. The power of AI will allow us to do things that before were complicated or energy-prohibitive, or just way too complex. I think simplifying that is a benefit not only to the larger retailers but the small, tiny ones like myself.

James Maxey Perfect. Thank you so much. Kristina.

Kristina Anderson I would agree. I walked away feeling seen because other retailers were experiencing the same things that we were experiencing at Midwest Petroleum. That's pretty validating and also inspired me because we need to solve it. I know if we need to solve it for us, that will help solve issues for others, which really will help convenience win the war, right? We're in a battle against the "dollars," the Dollar Tree, the dollar store, the dollar this or that. We want to win the battle against the dollars, and if we can do that by making us more efficient, then we can take those funds that we save and pour it into capital development projects. That was my takeaway from the last meeting.

James Maxey I'm going to quote you. I love that: "Battle against the dollars." Thank you.

Chris Bambury, any thoughts?

Chris Bambury Yes, good morning. I thought the last meeting was great. I'm a big fan of share groups, and so being a member of study groups, the NACS board, just casual peer-share groups, it was great to be in a technical one and hear a lot of what others are doing out there. I look forward to more of these meetings, so I appreciate it. Sad I couldn't be there in person this week.

James Maxey No worries. Don?

Donald Rhoads Thank you. I echo Chris and Lonnie. As a small operator, we continue to work through discovery and integration of technology, and I think it's really important that we understand that we're really in the first quarter of this game. For my chain, we have several initiatives going on as we speak, and I love to see Conexxus get involved with our discovery, selfishly, and ultimately the integration of what we're trying to put together as far as best practices and enriching that customer experience for our folks.

James Maxey Outstanding. Babir, you just jumped to the [virtual] front page, so I'll pick on you next.

Babir Sultan Hello, everyone. Thanks for having me. I'm pretty excited about the retail landscape and technology from our last meeting. It gives me a lot of encouragement. No matter the size of your business, there's a lot of technology that we could actually leverage. That wasn't the case when we started 20 years ago. We didn't have access to our own data.

There are so many things we're excited to be working on. There's social media and AI things that we're using today, with user-generated content being 100% AI and not having to use any sort of influencers. With camera capabilities, we're leveraging our existing cameras to have technology tell us if somebody fell, at what time they fell, and saving that data. [We're using those cameras for] heat-mapping and demographic data.

No matter the size of your company, I think we all could benefit from technology. It's not like you have to have 100 stores before somebody will speak to you, and it's getting cheaper by the day. It's not something you have to put together a $300,000 budget to start leveraging technology. Thanks for having me. I look forward to the presentation.

James Maxey I find that such an interesting comment. In the last five minutes, we've talked about AI twice and it ranges from salad, cameras and store. Some things just make you go, wow!

And last but not least, Rob.

Robert Razowsky Good morning, everybody. Thank you for including me in this group. I would concur with the consensus here that the last meeting was very informative. There were takeaways and certainly a number of cookies that we're able to look at and investigate and find ways to learn more about the things that others are doing. So, I want to thank the group. Beyond that, I'm looking forward to the remainder of this meeting.

James Maxey Fantastic.

NRF Takeaways

James Maxey Next on the agenda is the NRF Big Show from the National Retail Federation. Ed published an article about the show, so we're going to start with you, if you don't mind. If you could give some of your thoughts about the NRF, and after that, Myra and Gray, if y'all could do the same, I would appreciate it.

Ed Collupy I've been attending the NRF Big Show for probably over 20 years. And back when I was at The Pantry, we were using a lot of technology vendors that the rest of the industry was just about experimenting with or trying to figure out who all these tech vendors were. I went to the NRF to really learn about how a larger company, like The Pantry was to become, would begin to use other technology solutions that weren't necessarily at the NACS Show or weren't represented even around the table at PCATS back in the day. The show has grown from a mix of technology and coat hangers and merchandising racks to just about being 99.9% about tech. And this past year I had the opportunity, just like the last couple of years, to pull together an event for Conexxus. One of our Conexxus members, Robert Hampton, named it the "booth crawl". I put together this walk through the convention hall, which is actually huge, filled with tens of thousands of people, thousands of exhibitors, all about tech being used in retail. For this booth crawl, we visited eight different solution and service providers that had solutions from employee engagement to consumer technology. At the Verizon booth, they asked you to stand in front of a digital mirror and try on the witch's hat from "Wicked" virtually. It was a way of showing some of the possibilities to enhance the customer experience.

My big takeaway from the show this year was really: There's more to it than AI. You could walk down an aisle, dozens of exhibitors, every one of them had AI somewhere shown, either on their displays or on their marketing material.

Everybody's screaming AI. And I try to look beyond that because to me, the bigger thing was really about the experience, and NRF to me is experience. It's invigorating; it's exciting; it's all about retail. Back to what Kristina said about the dollar stores. Dollar stores are there, so you get to interact with people that are solving problems for the dollar store, and you get to see what they're doing. That whole experience really resonated throughout the show. It was an experience-driven show, and to me, you can learn a lot, you see a lot. You interact with a lot of people and really great takeaways.

There are different sections that the show is split up into. One that I think is a challenge to the convenience industry is the prevalence of food. At the NRF Big Show, there's a whole section now set up for the food innovation itself, and it was all about how food is playing a major part in retail. That whole competitive thing of where we as an industry continue to find our way, merging into the food business, we're going to be challenged across many retail segments for that. And that was very obvious at the show. It went into robotics making pizza, robotics doing the French fries. It was fascinating to watch. There were a number of people lining up to get their meal delivered, that they had ordered on a kiosk, made by the robot and then delivered into a food locker. It's just amazing to see, just as one example, the things that are going on.

And then in the startup zone, a section for startups, for innovators. Two separate sections, really. The innovator section, we saw a company called **Pensa Systems** where you simply took your cell phone, scanned the shelves, and then it matched up against your planogram to say you're out of compliance or you're out of stock, obviously. It was just fascinating to see how quick, taking an iPad or your cell phone and then getting the results back. And in the startup area, there was another company called **vaibe** that we visited. It was really about employee engagement. They can have their employee engagement application teamed up with various task management systems so that it gives the employee a task each day to interact and give feedback around what's going on in their role as an employee. Lots of good things that we saw. I'd encourage folks to attend. For retailers, if you sign up early enough in an earlier registration, you can go for free.

James Maxey Very nice. Thank you.

Myra?

Myra Kressner I would just say that if Ed had not brought up the foodservice tech innovation pavilion and the robotic experience, that is definitely something that is extremely relevant to our industry now, as well as a gamification company that we visited. I know many retailers are all excited about that, and certainly gamification is something that all of our Vision Groups have discussed at some point or other. As Ed said, there are real applications we saw at the NRF show for our industry.

Gray Taylor I'll just add one thing. I made note earlier when Alan talked about the NCR Voyix Halo POS. When I visited with the folks at Voyix, they were all excited to tell me all about what they had just accomplished with Meyer Oil Company and working with Alan's team implementing Halo. We talked about it from a standpoint of it's a self-checkout, all instantaneous, put your product down, it scans it with a camera. But they say it continues to learn. That's really how they think about differentiation. But they were excited, Alan, to share your story and initial success of getting it into the store.

Self-Checkout

Alan Meyer James, one thing, and I'll make this brief. I've never used Mashgin, but obviously that's the comp for Halo. And maybe Mashgin does this. One thing I'm excited for, once it gets out to market, is let's say all of us retailers use it and Hershey comes out with a new product. It can take the imaging from one of you guys' retail stores, upload that in the database, and then would know what that new product is before it would ever get into my store. That is the end goal of what they're hoping to accomplish. **The imaging, the accuracy of it has been pretty unbelievable**, so far.

James Maxey That's great news.

Gray?

Gray Taylor The most important thing I saw, to me, was going up to the innovation center. First of all, there's five Austin companies there. It's nice to know that Austin, Texas, is still a capital of retail technology. I remember my first show in 1993, it was so dead that we had to have a TV in-booth so we could watch the playoff games. It was all fixtures and desks and stuff. Technology was nowhere. I love the innovation side, and I got really excited with what Myra said because I'm a firm believer that we do a lousy job with labor. We complain about not having labor, and I'm saying we shouldn't have a labor problem because we have good people. How do we keep them? How do we make it a career? Gamification is being fit into hiring-technology tests so everybody's doing best-in-class hiring. How do we add a gig section to this? How do we add things that meet the lifestyle of our employees and do objective assessments? The top people advance and keep them. Get rid of the bottom 20% performers, but man, you got to keep rock stars.

I think it's a huge opportunity for us. I'm so tired of hearing at NACS events and exec meetings that labor is a problem. Unless we're going to procreate more, labor will continue to be a problem. And customers want to talk to people, so the solution isn't necessarily automation. It's keeping your best people. That's where I get really upset, because you get these folks that work together, if you could have a platform that would interest, educate, and reward the folks who are working for you and the people who are taking a bullet for the team, coming in on Christmas morning, call them out, and that sort of stuff. I think that's just one of the places we should be innovating fast.

Ed Collupy There was another exhibitor—Staff Start—in the innovation section that went right along with the whole idea of employee engagement. It was another app, of course, to turn the employee into an influencer. It gave the employee the opportunity to rave about their brand or rave about a particular product. And one of the stories that the rep from the company told was in one case, I think it might've been in Japan, the employee's influence resulted in a million dollars of sales.

James Maxey Wow!

Ed Collupy Yes. In just a few days. So they got online and they got followers and developed followers from being this influencer for the brand. And then all of a sudden she was promoting an item and off it went, changed over a million dollars. But it was a commitment to involving the employee.

Lonnie McQuirter Babir, is that why you have people live-streaming in your stores? He gets people live-streaming from the stores.

Myra Kressner By any chance, do you remember the name of that app?

Ed Collupy Yes. It's Staff Start.

Gray Taylor Sales is a great opportunity there. [Influencer input] drives incremental sales so it drops to the bottom line even faster. CPGs, Procter & Gamble will pay somebody $20 to convert them from the competitive brand to the CPG brand. Customer acquisition is a huge opportunity for us. We see the sales plugs, but if you can prove that your cashier is actively cross-selling another product, the CPGs will pay you handsomely for that, especially if you can get the third time they've bought that [product]. I think that's a huge opportunity for us to let employees become influencers, because they are the last-mile influencer anyway.

James Maxey Did anybody else within the group have an opportunity to go to the NRF? Dae?

Dae Kim Yes, sir. I had the opportunity to go, and I appreciate Gray organizing and taking the lead on that. A couple of fun facts. I did 26,000 steps that day. I got there before the group did, and so I walked one floor and then there were multiple different levels there. I hit my step count that day. The other observation that I saw, and I've not seen this at The NACS Show, so it was interesting to see this: the number of people that were livestreaming from the floor for social-media purposes.

I walked out; I was like, wow! They're just walking the floor and livestreaming for content and things like that. I thought that was interesting.

And then there's a lot of shiny objects there. I'm sorry I missed the dinner that you guys had organized after I decided to go to another meeting. But yeah, I wish I'd been there to do the download with the group over dinner, because what I picked out as I was walking was the problems that we're trying to solve for, and I was looking for very specific solutions, in no particular order. So those things popped up.

I can talk about them later, but I'll tell you I think the funniest thing that I saw in the NRF Show foodservice technology area. Heinz had a little booth, and what they were featuring at the show was a condiment dispenser that had AI technology. Basically it was…think of Coca-Cola's Freestyle machine for condiments…but the trick was you can blend things. So it was like ketchup, mustard and hot sauce, you can do that. And I just thought that was funny because it's like we've gone from just dispensers to now we have this thing that dials in your preference. It's uber complicated, and we're kind of over-engineering a very simple thing that you want to do.

James Maxey

You commented that you walked into the event and you had very specific goals. Two questions: One, did your goal change, or if it didn't change, did you achieve it? And the second question is: Was there any shiny object that you chased that you thought felt was beneficial?

Dae Kim

A surprise for me was I ran into a company that does weather prediction. They had the feed from NOAA (the National Oceanic and Atmospheric Administration), and they can dial it down to be market-specific. For car wash operators, it's so obvious, being able to know what the weather's like in advance. This is a forward opportunity to either push consumers to car wash or recognize: "Maybe we're not going to hit budget this week because it's going to rain." But the key is that they have it down. We've tried doing this internally and there are a number of different sites that you can grab a stat from, what's expected for the next three days and different weather things. But you have to kind of piece it together yourself. And this company's made it easy so you can just integrate it. That was a surprise.

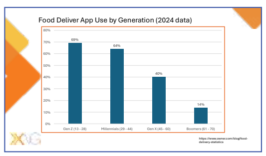
The big thing is really just looking for anything that we can do to improve store execution. A common problem for us is, we have 140 stores and not many of them have the same exact layout. We've got variability. If you have a small number of stores, like five, it's one thing. You can planogram and set a store. When you're at our size, it becomes administratively complicated to understand what those planograms are, particularly as things change. I met with a vendor, **Movista**, that offers potential solutions for that, and we'll see where it goes.

The other one that I thought was really interesting was a company called **wayvee analytics**. Basically, they're measuring employee satisfaction by measuring heartbeats at shelves. It's very high level right now. They're very eager to test somewhere, but they know the background work. They said, "Hey, there's evidence that suggests that the sensors are accurate enough to understand emotional state," right? I thought that was pretty interesting.

Glennie Bench What was the name of the planogram company?

Dae Kim Movista.

The Presentation



Delivery

James Maxey Very good.

The next topic of the day is our third-party delivery case study. So when I was preparing for this meeting, I thought, "I'm not a big delivery guy," to be perfectly honest, I've got to do some research. I fall into that boomer range. If you look at this first chart, food delivery app use by generation, you can see that roughly **69% of Gen Z** are using the apps. Millennials, 64%. I hope there aren't many 14-year-olds out there using it.

Myra Kressner They are.

Kristina Anderson Yes, I have a 14-year-old son, he's absolutely using it.

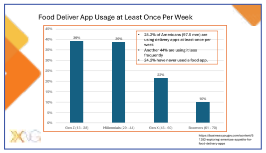
James Maxey Wow! I stand corrected. Kristina's testified that 14-year-olds are using it.

Kristina Anderson They're sending food to the school.

James Maxey Wow! That makes my head explode.

I personally fall under this boomer generation, but after looking into all this stuff, between now and the next meeting, I'm going to have food delivery happening from my house. These percentages just blow me away.

This chart kind of surprised me and my knee-jerk reaction was, "Well, 69% and 64% are using it, but how often do they use it?" And it's coming back to the second dataset.



For Gen Z, 39% are using it at least once a week. Millennials, another 39%, and Gen X, 22%. I found that 28.2% of Americans, 97 million people, are using delivery apps at least once a week. Just astounding. Another 44% are using it less frequently, and only 24.2%, me, have never used it. But we're going to get there. If you want to know where I'm capturing all this data, I will share these links, but they're all on the PowerPoint, which we'll share.

Thinking about these statistics, yesterday during my office hours with my students, I was talking to a student named Katie and I said, "Katie, I pulled these numbers, and I don't know that I believe them. Katie, do you use food delivery apps?" And she laughed at me. She said, "James, I use it at least once a week." And she said, "If you look at Roger's Uber Eats account [Roger is another of James' students], you would be amazed. He uses it multiple times a week."

If I had a convenience store and I was making food close to a university, that'd be the number one place I'd be advertising, getting those kids fresh prepared sandwiches, smashburgers, whatever it happens to be, because they are active, willing, fully funded customers.

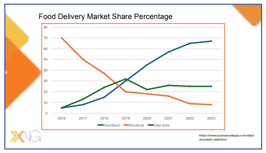
Kristina Anderson Fully funded!

Gray Taylor Yes. They've got dad's American Express. I've got five kids in college, and clearly one of them is at Trinity.

Glennie Bench Exactly. We have a nontraditional store on the first floor of an apartment complex at the edge of Florida State University, and I'm amazed at the number of kids who order delivery. They're one floor above our store!

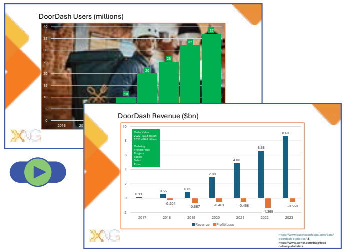
Gray Taylor They'll go to a convenience store and order seven bucks worth of stuff and pay $20.

I've got two kids who do gig work, and they're now working at TXB. It's an opportunity for the chain. That's what the kids are doing, too. They'll go out and do the deliveries. But the flipside of that, they're getting 97-cent tips, things like that. It's an interesting ecosystem.



James Maxey I looked at market share. In my mind, I thought Uber Eats was going to be number one. But as it turns out, DoorDash is leading the way.

2023 was the most recent data I can find, but I can't believe it's going to be dramatically different based on these trends. If you look at the number of DoorDash user in millions, in 2023, 37 million people are using DoorDash.



Glennie Bench We see a lot more options for DoorDash in the rural areas where we have stores than we do Uber Eats.

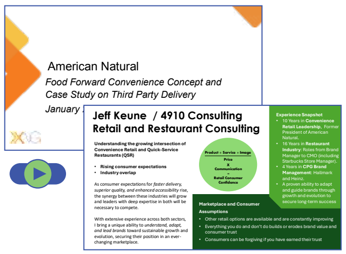
Gray Taylor Really? They're not like the big names and local guys.

James Maxey And last but not least, if you look at DoorDash revenue versus profit and loss, they saw a $558 million loss in 2023. But revenue was $8.63 billion. They're losing a little bit of money.

With that said, I'm going to stop sharing my screen, and I will turn it over to Jeff. Jeff, are you ready to share?

Jeff Keune I'm ready.

James Maxey Perfect. Thank you so much, Jeff. Take it away.



Jeff Keune What I'd like to do is introduce myself real quick and talk a little bit about my background. In the last 10 years I've been a retail leader in convenience. The topic today is going to be covering some of the experience that I have at American Natural, which was a role that I had as president. But before that I worked at Thorntons and a number of other strong retailers as a CMO, as well as other roles. I have 16 years restaurant industry experience, started my career at Wendy's, so I have a lot of QSR background as well. Prior to that, I spent four years in CPG. So I had a culmination of experience coming into the convenience industry, and all of that has really come to fruition in terms of my consulting work that's going on right now with 4910 Consulting. It's really looking at how do you take some of this experience to elevate foodservice, marketing and branding within the convenience industry?

There's a lot more overlap between what the consumer is doing. As we all know, foodservice is growing exponentially, and that is something that I think still has a lot of upside. I believe that consumer expectations for faster, better quality and enhanced accessibility for food in the convenience industry is only going to continue, and other retail options are available. Once again, what I've tried to do is make my brands a destination, and I'm sure that you do the same, whether it is for traditional convenience-store products, food or other services.

In my experience with American Natural, this is where we were. I came into American Natural as the president. I came in as they were not really doing very well. It was a brand that was started with a vision by a founder of taking the cafe concept and experience that you saw in convenience in Europe and bringing it to the United States. They built six of these stores in the Pittsburgh area. They're beautiful stores. They were very much along the lines of the cafe, with seating and the menu that they had. And it really performed okay. It didn't return what the board was wanting. It didn't have a real foundation of team member engagement, as well as an understanding of what the consumers in the area were looking for. This is Pittsburgh. There's a lot of blue-collar; there's a lot of white-collar, but the concept floundered. And that is when I came in.

Foodservice

I took a step back. I built the positioning, the marketing, and the food, along the lines of what **fast-casual trends** were. We're seeing the growth of fast-casual concepts, and convenience and QSR are mimicking that, of having a better experience and better food. So we simplified and led some innovations around the menu. Then we built the marketing around those things.

What we kept in terms of the attributes that we felt were meaningful was local. If you look at the Italian Stallion visual on the slide, that was a visual on the menu screen. That was a big screen that we had behind our coffee bar. You see on the upper right, a logo for Mediterra Bakehouse. That's a local bakery that we used for the bread for our sandwiches. Steel Cup Coffee was also a local coffee roaster in the Pittsburgh area that made great coffee that we used in our beverages and espresso drinks.

What you also see is, the consumer that we wanted to reach was not just upper-income soccer moms. It was really the core traditional convenience consumer, that blue-collar male, that person who is on the go, just looking for something better. And I think that is happening in a lot of different brands out there.

Menu Development

We tried to do our best. We did not have a sausage, egg and cheese bagel sandwich when I got there, and that's one of the things that was one of our **best sellers overall**.

The brand story led through some innovation. We tried to keep things simple but high quality. We tried to make things efficient, and we were very, very sensitive to how much the consumer would pay for the product, based on the quality. We introduced a salad line that was $8.99; previously, they'd been $12. And you can see signage for an $8.99 combo with a Smartwater.

We introduced a lean, very popular turkey sandwich, but again, with the local partner of Utz Chips. We leveraged our relationships with the traditional convenience-store suppliers to have better promotions for Coke, Pepsi, and Red Bull, and the other energy-drink suppliers.

We also brought in new things that not only added innovation, but added efficiency. We had a big bakery program, but we had a lot of waste with our muffins. What we chose to do was create a muffin cup with whipped cream and fruit and, with the leftover muffins, sell them at a very reasonable price. It was a great grab-and-go item in the end.

The American Natural menu really led to a lot of different promotions, but we still needed visibility. We did a lot of social-media activation. We asked ourselves, "How do we get more food in more people's hands, in more touchpoints?" in a lot of our discussions.

Again, we had a lot of local partnerships that helped. If you've been to Pittsburgh, you probably know Turner's Tea. It is a blue-collar staple. Construction workers get it all the time. We expanded our offering and made sure that was something that they were able to get. We built it into different combos and different bundles with other products.

Lastly, I would say that when we looked at promotions, we were using an ordering system called the iOrder, as well as big menu boards that had very small font in print. And we moved everything to the iOrder system, which is a **made-to-order system** where the consumer self-selects the different products that they want, and then it's taken back to the kitchen for the team members to make it and bring it out.

We took all of the screens that were the menu boards and made them promotional. The insight that I would share here: take the opportunity for people to visually **celebrate the wonderful food you have**. That's meaningful and will draw the eye, attract attention, and convert more consumers who might be just coming in for tobacco or a packaged beverage into the food platform.

Last thing I would mention is, as we get into the third-party delivery, we did have a loyalty program. We used that to drive consumers into a place where we could **communicate with them directly**. We did have strong incentives for repeat purchases. We also wanted to be able to push out messages to them, once they'd signed up, which we did in a lot of cases. That was an incentive for us to see that they had been part of a food purchase and to push them into the online delivery as another option.

This slide is an example of what we worked on with the team members, in terms of the **uniform promoting the rewards** and attributes. We gave them a uniform that they felt comfortable in and could have a little fun with it. Any questions about American Natural, overall?

Foodservice Technology

Promotions

Delivery

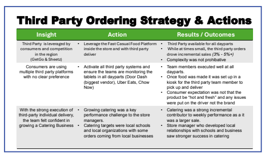
Strategy

The Discussion

Gray Taylor Was it operated as a separate P&L (profit and loss) and was it fully incorporated into the store?

Jeff Keune American Natural was one P&L. Each store had one P&L fully incorporated. We didn't separate out the foodservice at all. It was something that was not a separate entity. The store manager was managing that growth, along with the growth of the other products.

Kristina Anderson Can you talk a little bit about online ordering? You mentioned that there was a space that you used, was it for ordering? Can you talk about that a little bit?



Foodservice Technology

Jeff Keune Yes, we did. We utilized third-party delivery a lot. And that was the online ordering tool. We did not have a separated-out internal proprietary online ordering proposition. There were times where we had bulk orders that were called in.

Quite honestly, that part of it was very manual. It was someone coming up and asking for, "I've got a busload of soccer players going on a trip. Can you give us 40 sandwiches on this date?" And we made them. The **third-party ordering** and delivery systems were what we used for a lot of that, as a solution for a lot of the individual orders.

Kristina Anderson And one more question. You mentioned your loyalty program. Did you guys set up ordering at all in the loyalty program? Or was it strictly the third party?

Jeff Keune That's a great question. We never got to that. Before I got there, and this is not a negative, it was just a very efficient choice that was made. They decided to go with PDI as their loyalty provider. PDI has internal tiers based on your store numbers. And so, we didn't have access to the tier that had the online ordering associated with it.

So, I think that there are solutions out there for online ordering with loyalty that are more flexible a platform, but we didn't have that access.

Gray Taylor The online ordering, was it connected to any kitchen system? Or was it just a message, "We need these items"?

Jeff Keune The online ordering was through the different individual providers' tablets. So, we had the team members monitoring the individual tablets across the board. We did all three of the platforms.

Babir Sultan When you're doing your research on what to carry in the store, like you said, the bagel with the sausage, egg and cheese might be something. How did you go about doing your research, or figuring out what to put on the menu, and make it your own, too?

I think the challenge becomes owning it, and being proud of it, and putting it in big fonts. Usually, a lot of vendors just give you something generic, and you paste it. It's not the same as owning it.

Jeff Keune We did a lot of data mining. A lot of what was selling as a macro, as well as at each store. We were looking at the actual sales, but also the trend in sales.

And then we looked at, all right, we need to have a better discipline around margin, and food cost, and understanding how we were really looking at that model overall. We said, "I want to have the things that have the broadest appeal, as well as those things that are going to develop more of the bottom line."

Menu Development

If I had a sandwich on the menu that was a decent amount of sales, but we weren't making the money, that was something that we either changed or optimized out. It was the food evolution of the menu. And the innovation part of it was, how do you take this concept of **simple but one better**, and how do you build new products around that?

Our original menu, and you'll see this at some fast-casuals, had a lot of different ingredients on a sandwich and a lot of complexity in order to make it. We had what I would call a box. You have a box of complexity. And so, if you have too little complexity and it's unappealing? Then it's not great. But if there's so much complexity to a sandwich. We put as: one cheese, one sauce, and two condiments, then we filter around that. If we had four or five different condiments, that, one, probably is going to hit our food cost threshold, and two, is going to be hard for the team to execute.

Does that make sense?

Babir Sultan Yes, thank you.

James Maxey Perfect. Thanks. Kristina, you have a question?

Kristina Anderson Yes. You mentioned that you used all three third-party apps. So, did you guys have all three of the tablets up at the same time? Did that confuse your staff? And how did you handle the printing? Because we're going through that right now, and what we're doing is trying to get all three tablets to print to the same printer so that it's easy for the staff to know what to make next. Can you help talk through that, please?

Jeff Keune Yes, we did have all three, and we did print out as described. We were not, at the time, able to consolidate that. It was a little confusing. What we felt like we needed to do was challenge our team to have enough staff on to execute. So, we were a little labor-heavy in the kitchen.

That enabled us to have somebody who could have an eye on those different tablets. As a result, we felt like this was a very incremental business. It was not the biggest part of our business, but it came across as between 3% and 5% of incremental sales each week, the amount of food.

We asked, "How do I manage to this complexity?" versus, "How do I simplify it to the point where I'm eliminating either ChowNow or Uber Eats, and just have DoorDash?" We felt like there was enough business there, and we could manage within a certain labor guideline and a certain complexity, that the incrementality was paying for that complexity. Does that make sense?

Kristina Anderson It does. Thank you.

James Maxey Do you have a question, Eva?

Eva Strasburger Yes. With the incremental sales, were you able to figure out whether they were new customers versus your regular ones?

Data Analysis

Jeff Keune I would've loved to have gotten there. I would've loved to tie that to loyalty somehow, to get that regular ticket. We looked at taking away that business, but when we compared delivery stores to those stores that didn't have that business, we saw the incrementality over and above. The math worked, but we didn't have clear data. We weren't able to tie the loyalty program to the different tablets and **understand that incrementality**. We did some data analysis looking at the individual loyalty users, and we felt like it trended toward their bigger purchases. They were bigger purchases. But we don't know if that was because of the things we were doing with loyalty or the fact that they were using the third-party delivery.

The other factor we had, which was something that we cultivated, is we had a team member that was our loyalty manager. He covered off things like this from a technology standpoint. He could look at the data, understand the analysis, and give us recommendations in terms of improvement and changes.

The person who covered loyalty, while it wasn't captured under loyalty, was also someone who was handling the different relationships, as well as understanding how to better set us up for success.

Strategy

James Maxey Thank you.

Jeff Keune As I said, we leveraged every delivery platform. We activated all of the different opportunities with DoorDash. DoorDash was the biggest vendor. They are the biggest vendor in the industry. Uber Eats and ChowNow followed. Once the food menu was set, we did have a kiosk set up in front of the kitchen in the service area, where the delivery drivers could come and pick it up, and they knew to do that.

We also felt that the consumer didn't necessarily expect [their food] to be hot and fresh. We didn't really have much control over the time of the drivers. We did our best to make it certainly within the time that any consumer would expect to make it. But we didn't have the ability, and we didn't invest in **incremental packaging**, that would try and keep it hotter or fresher, knowing that it may sit for a while.

James Maxey That's a very interesting comment. Consumers are not expecting it to be hot and fresh.

Kristina Anderson Yes. Actually, I think that's true. Thinking back over all of our foodservice delivery experiences, they don't expect it to be super fresh. They know that you're going to take an additional 20 minutes to get that food to their homes. That's a good point, to not over-invest in packaging, because they're not expecting it anyway.

Gray Taylor It's going in the microwave when they get it, anyway.

Kristina Anderson Correct.

Gray Taylor What if you did deliver it hot and fresh?

Kristina Anderson I don't know if you can. If I think about fries? French fries are out of the fryer for what, three minutes, then they're no longer hot and fresh. So, I don't know if it's possible.

Gray Taylor It is a fact. But it's a great question, though. Do I invest in incremental funds for hot and fresh? Or do I get there and do great microwave packaging, as opposed to my packaging?

Kristina Anderson Or even some instructions on the packaging for reheating? That's a great point.

Jeff Keune It was a complexity issue. We had the position that the consumer probably was going to be taking it out of the packaging when they got it to microwave it. And so, that may have been a simpler assumption.

That was another point that was brought up as we were talking about that packaging, and an investment of three, four or five extra cases in the back of the house. Does the consumer want to have a package that's more microwave-friendly? Or are they going to take it out and put it in some of their dishware and reheat it that way?

Ed Collupy Subscription meal concepts like **Factor** will send it to you a meal in either microwave or oven-safe packaging, then give you instructions on how to microwave or heat in the oven.

Gray Taylor I think this is worth a trip to the National Restaurant Association Show. Because every QSR you compete with has got the same problem. I've met with those three or four vendors that double the R&D to make it happen. We hear this all the time. Maverik's got a tough problem with this. Even if they're out of stock, they have no communication whatsoever with the customer once the order is made. So we see there's a lot of room for improvement here. I mean, I'm shocked that you think an improvement would be that you could print out orders from all three tablets. We should be getting rid of those three tablets.

Kristina Anderson There are vendors that will pull everything together into one, but then you're adding the additional cost of that additional vendor. What's the benefit? Is it really saving us that much time? But if we could have the printer, that would reduce errors in our execution in the kitchen. We still have room for improvement, because we have to put up with these three tablets still, and it's still confusing.

Gray Taylor What if we can send it digitally through their phone system?

Kristina Anderson I love it. That's what we've been asking about. We asked specifically about it.

Gray Taylor Conexxus has a Foodservice Working Group that is tackling this whole idea.

Lonnie McQuirter Informa Connect has a C-Store Tech conference. It also owns the National Restaurant Association Show. If there's someone involved on that side working with the standards and coordinating that, I think there's synergies to be had there.

Gray Taylor Ed's got a great contact with [foodservice business consultant] Rob Grimes, who is all over that. And maybe there's a booth crawl we could do at NRA.

Lonnie McQuirter There are some great technologies out there. But are they catering to the convenience retailer or to the QSRs? Some of the groups you're talking about, they're pulling in DoorDash and Uber Eats to bump up sales. They're doing a fair job but not a great job. The pain point is you're already giving 20% of your top-line to DoorDash. And you're adding up 4 or 5 points with Vroom.

Kristina Anderson Yes, that's 6 points.

Lonnie McQuirter It's from that angle where you're trying to be on all those apps just to have that exposure.

Kristina Anderson Right. The perfect solution would be, as Gray said, to work with our POS system, and if there'd be some kind of data from the third party into the POS, then it'd simplify our tracking, it simplifies our reporting, all of those things.

Lonnie McQuirter And from our handhelds where we're already doing our inventory cycle counts, as well. So, we have the out-of-stocks stocks, it's automatically populating to those third-party services, saying, "Sorry, you can't order it. It's not in stock."

Gray Taylor We're talking to Vroom and two others that advocate these different types of delivery services, and getting info from them to help understand how we handle it when teaching it into our ecosystem. Conexxus is going to be a part of that because we're trying to develop that standard, the conversations will allow for that to happen.

This will be, in the end, a lot more common than not. It's going to become a better pipeline, part of the reason why you're selling your fries. But you don't know when the guy is coming to pick up the food. It could be 10 minutes. Maybe it's more. The delivery guy, who's got GPS on his phone, why isn't he calling me and telling me when he's 5 minutes away? Why doesn't your tablet automatically say, "This guy is 5 minutes away"? Then I can say, "I know that order came in later than this one, but I'm going to give you the earlier one, because the driver is going to be here sooner than the other driver." Once you open that all up, you can figure out all kinds of ways to streamline and deliver a better product.

Lonnie McQuirter That's true. Delivery is a different way that you'd want to space things out if you're preparing it, especially fries. It's very time-sensitive to make sure the thing gets delivered on time, otherwise you're going to get bad reviews. Bad reviews are because drivers took their sweet time getting it delivered.

James Maxey I'm hearing a bunch of different things. I'm hearing, one, "Don't over-engineer it." I'm hearing, "We need to have standards." I heard twice, "We need to create convenience-store examples for our industry." It's great conversation. Tom, I see you have your hand up.

Tom Bachrodt Yes, I have a question. Jeff, you mentioned early on in your presentation using social media. Did any particular type of social media really stand out, that really worked for you?

Promotions

Jeff Keune We did a lot of Instagram. We did all the social medias. We did Twitter, Instagram, and Facebook. But we had a lot of success with gaining more followers on Instagram. And it's because it's visual, it's fast, it's more engaged, or we felt it was more engaging. And that was one of the marketing tactics.

Promotions

We had a big shift in terms of our marketing planning while I was there. When I came in, there was already a built-in commitment to TV advertising. And at the end of the day, we backed away from that to **focus on the store-out**.

Loyalty Programs

We focused on building a strong loyalty program, building out a store-level experience, messaging, and activation. Building out team member activation. And then driving social media as much as possible. We did some direct-to-consumer messages, but that package was efficient enough for us to feel and be able to track a stronger return.

Tom Bachrodt Okay. And then you mentioned the loyalty incentives. What percentage of the customers, if you have that, use the reward or incentive?

Jeff Keune We had a goal of getting 30% of the consumers on the loyalty program. We did that. We did that through messaging at the store level, but also team member activation. We had a team member sales contest, or actually a **sign-up contest**. The store that got to 30% first, the store manager got a trip to Florida.

Nothing crazy, but we thought about how we encourage that employee behavior to ask every single time, "Are you a member?" How do you have good benefits for the program without feeling like you're going to get as big of return as you need to off the loyalty over time. As much as anything else, it was a store-out and a team member-out direction versus anything else.

Tom Bachrodt Great, thank you very much.

Gray Taylor One more comment, a follow-up to one of Lonnie's questions. There is a Foodservice Working Group here at Conexxus. They're meeting this Thursday morning. If anyone's still around on Thursday morning, you're welcome to join us.

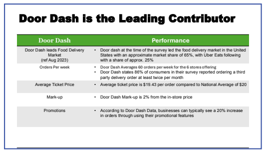
James Maxey Perfect. Thank you. Jeff, we'll let you continue on. That was great conversation.

Jeff Keune Good. If you're doing online ordering, I would strongly consider offering catering, if you have an appropriate food platform. Catering came from relationships we had with local high schools, local youth sports teams, and organizations like that.

We probably had one catering order per week, on average. And they were bigger orders, so they were also incremental to what we were doing as a company. If you can do online ordering, it's not a big leap to do catering, so we built that attribute within the system.

Lonnie McQuirter Real quick. The group that meets on Thursday? Gray, I'm not sure if Doug Kantor, [General Counsel at NACS], is going to be around, or if there's anyone else in government relations. But it is probably important that he at least gets the overview about what's being said there.

We have the active food traceability bill that's still moving through Congress and will probably be implemented in the next couple years. That's a whole mess of policy that's coming through, that we, as retailers and as wholesalers, are going to have to adapt to. I see this working group as being important to get somebody there. Just my opinion.



Gray Taylor We also have USDA. If we're successful with hot food, we'll be "SNAPable." If you're doing online ordering, that could be "SNAPable" unless they do something stupid like say "you've gotta go to the store" [to use SNAP (Supplemental Nutrition Assistance Program) benefits].

Jeff Keune This is the last slide, and it feels like people might be already aware of this, but this is just the snapshot of the leading purveyor, which is DoorDash. Their food delivery market in the United States is approximately 65%. So if there's one to do, this is it. They average 60 orders per week. In our stores, that's how many we averaged on DoorDash and that was pretty consistent if not growing. DoorDash states that 86% of consumers in their survey reported third-party delivery orders twice per month. If you're able to get someone into the system of DoorDash, it is at least twice a month, if not more than that. And we found that the markup was relatively reasonable, and they do have promotional features that can be leveraged that they claim will incrementally increase your business.

Those are the slides I wanted to cover and if there are any other questions or discussion.

James Maxey I want to reach out to the group and poll the audience to get more thoughts. Any questions that we can throw out to Jeff?

Roy Strasburger Jeff, do you feel like what you are doing is a sustainable model for the next 2 or 3 years?

Jeff Keune Yes, I think it's sustainable, and I think it's only going to grow. The consumer is being more engaged with online delivery, not less. And to be able to have the systems and processes in place to have that elevated foodservice and then leverage it will only drive more incremental growth.

Roy Strasburger To follow up on that, I have been reading a lot on this. Food delivery services are still working on reaching profitability. So how much does it affect your business model if their delivery charges go up another 5% or five points as they develop?

DoorDash has got 65% of the market and is starting to dominate. Will they start raising their prices?

Jeff Keune We did not upcharge for delivery. I think that as would anything else, if this vendor is starting to increase their prices, we would look at how do we compensate for that? Do we feel like we can increase the prices on DoorDash or do we think that we should change the prices overall if that is what the consumer is demanding?

Kristina Anderson Just as an answer to that question, I think that if you look at the two generations that are really using these apps, millennials and Gen Zers, and some Gen A, they're learning how to order too. It's scary. These generations are used to everything being online, and I honestly do not believe that incremental price increase will change set-in behaviors because we're training a whole generation of people to search online first. And I don't think that they notice how much it costs. They just have a baseline expectation that it's going to be more expensive, and they're okay with that. When I look at the cohort of teens and tweens, they all are comfortable paying $35, $40 to get one meal delivered to their homes.

So I really do think that we have a lot of opportunity here when it comes to third-party delivery, if we can make it work so that we get our sales and financial information in real-time like we would if they were ordering at the point-of-sale in the store. So I think our relationship with Verifone or the other POS providers is paramount here so that we can make better real-time decisions at the operational level at the stores.

James Maxey Great point. The definition of convenience, we're coming right back around to, I'll pay a little bit more.

Gray Taylor I'd like to throw out a future scenario. DoorDash has said this publicly: They plan to dominate the car dashboard and so this is now a new type of transaction where the customer is going to be driving somewhere. You're going to ask Google [or] ask Apple, "I would like a smashburger. Where do I go and get it?" And it's going to say, "Up ahead, there are two places; one's right turn in, right turn out, the other one's left turn, left turn, it's on your left. Which one do you want to work from?" Now you can order from the easiest location, you're doing it all via voice and now it's all curbside delivery.

James Maxey And we know the car drives itself.

Gray Taylor Yeah, maybe that part, far in the future, too. At that point what you're doing, because MasterCard did a study and said that 35% of people who are filling up at your gas island were on their way to a fast-food restaurant. The whole idea is, if you're seeing all these people drive by, you can capture them on the dashboard. Now, that's also going to include store merchandise. They're not going to just stop. And I think it's an asset for us to also include some store merchandise in there, but it gets rid of the whole delivery upcharge. It also projects your entire store now. If you're not out there, you're not considered, pending price point and product availability. All of those things will have to be projected out. I don’t think it’s too far away. That’s why we’re really focusing on doing a DoorDash interface because if anybody’s going to win that dashboard, it’s going to be them, and then other people will follow.

James Maxey Nick, thoughts, comments? What do you think?

Nick St. Romain All sounds interesting. No real comment, though. We do much of the same.

Tom Bachrodt I’ll add one thing. The interesting thing in the DoorDash concept to me is the older generation. I’m a baby boomer, and I’ve never used DoorDash until this past weekend. My son and I were watching a game, and I said, “I’m going to head to the store and get something to eat.” He goes, “Why do you want to do that? Let’s just use DoorDash.” Had no idea how it worked. So I wonder how many of the older generation is actually going to come around to this concept. It’s very intriguing and I don’t know that I’ll use it again, but the simplicity of it was just incredible. That’s the first time I’d seen it in use.

James Maxey Okay. Kristina?

Kristina Anderson I think we also have an opportunity with Instacart because I found a lot of the baby boomer generation is using Instacart after a surgery or if somebody’s at home or if they’re out of town and they need something. I’ve sent Instacart to different relatives for different reasons. If our stores are on Instacart with our convenience, all of the items that they need, could we not also do a tie-in there with foodservice in some sort of way? As we’re talking to DoorDash, it may be worth having that conversation with Instacart as well to see what we need to do in order to be fluid there.

Ed Collupy The standard could be to allow for any one of the multitude of providers to be in the interface.

Gray Taylor To me, the reference architecture idea, this is the way our industry is going to do it. We see 160 million people a day. QSR sees 60 million people a day. You want to do business with this industry. It’s highly fragmented; there’s a singular standard that you guys can adopt.

We can’t have every 50-store chain developing its own operating standard with DoorDash. We really need to say, “This is the way we do it.” And Instacart is a great example. They just added the foodservice element to their service. Why not? You’ve got the groceries already; you’re there. So yes, you’re going to support everybody, but it’s going to be just a header message saying, “This is a DoorDash service.”

My daughter ordered her groceries from the Brookshire Brothers that's in the union at Texas A&M. She could walk there in 2 minutes, but she ordered the groceries. That is great.

Rob Razowsky Being in a major metro market like Jeff was, it seems like many people have their very favorite quick-service restaurants and go-to places whether it's for a hotdog, pizza or a sandwich. That's challenge number one. The second takeaway that I have from this whole conversation is most of us have a limited labor model, which restricts us. Labor continues to be a challenge to our industry from a standpoint of foodservice because if you're not doing volume, you can't support the labor. ... It's a catch-22 on so many fronts. Jeff, what you guys experienced and the reason for success or failure is all about volume. And the cliche is: "I'm still hungry, I could eat food from a convenience store." So we have those challenges.

Foodservice

Some of the larger players in our industry have created a market and have a following, and it's really truly incredible. There are guys who have one store that really is a destination [through a unique foodservice program], whether it's Kansas City Barbecue or whatever. You have to **create that environment where you are a destination** for whatever it is. My son went to school with a guy who smokes his own meat. We brought in on a limited-time offering some of his pulled-pork sandwiches. The takeaway was we can do this on a limited basis and then see if we can find that right mix. We have somebody that comes into one of our stores and makes fresh deli sandwiches every morning, and our biggest seller is peanut butter and jelly for $3 a sandwich. They fly off the shelf. It's simple and it's easy, and there's very little waste. Now, are we making a lot of money doing it? No.

We've tried DoorDash in a couple of locations. It seems like the hours that DoorDash was working were fringe hours when we had limited labor, and I don't think we got to $20 for an order. They were buying Fritos and beverages. We couldn't deliver liquor per se, so there was no beer and wine. To get to that $20 for us was a challenge.

Anyway, my takeaway is this is so much to do with volume as Jeff attested to. How do you create that for your individual stores? That's the million-dollar question. That was just an observation and a thought. Thank you.

James Maxey I'm just going to reach out to one or two more people. We'll wrap it up from there. Alan, let's start with you.

Alan Meyer Specifically on this topic, we're doing Vroom. We do have it integrated with our loyalty program. Ignite is our loyalty program, so we were able to get that implemented. It all goes to volume. We have Little Caesars at the places that we have Vroom, and then we've got our proprietary label. A lot of our Vroom sales are tobacco, which is already a low-margin item. We've got it right now at four stores, and I think we're going to continue to build it out, but I don't think it's going to be a major source of profit for us. Now, we're a pretty rural Illinois like Rob talked about, so our typical market is 4,000 to 8,000 people.

James Maxey Okay. Dae, go ahead.

Dae Kim Gray, is Vroom, or any of these guys, are they members of Conexxus?

Gray Taylor Yes. Are they engaged? Not really.

Myra Kressner Chris, did you have anything you wanted to add?

Delivery

Chris Bambury Yes. We are also doing Vroom and I don't know if it was mentioned in the room there, I didn't hear it at all, that you can partner up with DoorDash and some of these other deliveries, and as long as you're not on their marketplace, they'll give you a better rate for using their delivery system. So you pay a premium to be on their marketplace, but if you're willing to do your own app, your own marketing, you can **just use their drivers**. That's a way to save, but it's a trade-off because they have a lot of eyeballs on their platforms. That's something we're working on with Vroom, trying to develop some in-store food kiosks, as well as the full integration into loyalty apps and online ordering.

Alan Meyer Chris, have you actually tried taking it off the marketplace and doing your own thing to get that savings?

Chris Bambury Not yet. We're still working with the Vroom team on the kiosks and with Ignite, as well. We're just trying to pull all pieces together.

Alan Meyer Yes, we're in that same step in the process. I'd be curious about that to see how many of those are your customers and how many of those are DoorDash customers. That's what you're trying to answer, right?

Chris Bambury I think you get them on DoorDash and you flip them to your own app with a better deal.

Alan Meyer Are you guys using Rovertown?

Chris Bambury Not yet, no. We want to look at that as well. We're in the midst of a lot of technical coordination between a lot of avenues there. If you get them all to work well, it seems like you could have a world-class system.

Alan Meyer That's the goal.

Lonnie McQuirter Chris, what's the goal of using Vroom and the third-party deliveries for you guys? Is it a red-ocean strategy, or are you looking to potentially break even, to make money with a third party?

[Editors Note: "Red ocean" strategy is when companies try to outperform their rivals to grab a greater share of existing demand. As the market space gets crowded, prospects for profits and growth are reduced.]

Chris Bambury We've got customers asking for food delivery. We didn't like DoorDash coming to us with what they first offered. We started a negotiation to get...You hear from the Chevrons and others, these third parties, nobody's happy with them. You don't make any money at it, even at the large levels. It is just like a churn. You're just moving volume. I think it's getting those customers in your own ecosystem with a better price because the customers aren't happy about today's DoorDash prices or Uber Eats prices. I think that's the only play we can see. Third-party delivery's a lot of heartburn from everybody you talk to.

Closing Comments

James Maxey Great comments. If we could do a virtual applause for Jeff. We thank you for your time, great presentation, obviously very stimulating conversation. It's much appreciated.

Believe it or not, the planning for the next meeting has already started. The dates are going to be released soon. In fact, I think the dates will probably be released in a few days or so.

We're down to 5 minutes, so we're going to jump to closing comments.

Roy Strasburger Thank you very much to everyone who participated. It was a lively discussion. Jeff, thank you for your presentation. I find that delivery is a fascinating part of the retail environment, and the importance of it, or certainly its importance to our customers, of it. Although it may have peaked during the pandemic, it has remained a viable way for customers to get what they want. There were really interesting questions, comments and ideas that came out of today's conversation. Thank you for your help in our first hybrid meeting.

James Maxey Perfect. Eva, your thoughts?

Eva Strasburger This was very interesting. I remember when we first got into the third-party delivery. Our nightmare was the training side of it. People couldn't find where the tablet had been put or the tablet hadn't been charged. There was nothing worse than coming in the next day and finding three orders sitting on there. Or you got really busy and they would pause it and forget to turn it back on. That's another huge complication with the delivery. But it's fascinating. There's a lot more to discover and the big question again is whether it's profitable. Thank you everybody.

James Maxey Next up is Myra.

Myra Kressner I have three quick closing comments. One, this was our first hybrid meeting, and we appreciate everyone's patience. Thank you, Jeff, for participating and leading the discussion. Thank you, James, as our facilitator, and thank you to you all for coming and sharing the information.

And lastly, as we talked about foodservice technology, Ed is the facilitator of our Convenience Technology Vision Group. That next meeting is on March 7th. That topic has been identified, and we are well underway with Rob Grimes from IFBTA (International Food and Beverage Technology Association) and Cameron Watt with Intouch Insights who are going to lead the discussion on foodservice tech. Be sure to look for that. And lastly, the Vision Report for this meeting will be available in about four to six weeks or so. Everyone look for that and share. Thank you, everyone.

James Maxey Gray, 30 seconds or less.

Gray Taylor Foodservice, it's our growth area. It's where convenience has to go to justify some locations. We have the rightful position there with our foot traffic and how well we're doing it today. We have $50 billion in turnover compared to $300 billion for the QSR folks. We have room for growth, and this is what we need to do.

I think the customer is changing to the point where we need to rethink the model. Don't put in a drive-thru window. The drive-thru is going to be out in the front door. And by the way, grocery stores don't make money on DoorDash. They make money only on curbside orders, which is why H-E-B is filled with people other than customers every Saturday.

James Maxey Very good. Thank you one and all. Welcome to our new members, and I look forward to our next visit. We'll talk to you soon. Thank you.

CONEXXUS VISION GROUP
PART OF VISION GROUP NETWORK

James Maxey
Facilitator

VISION GROUP NETWORK

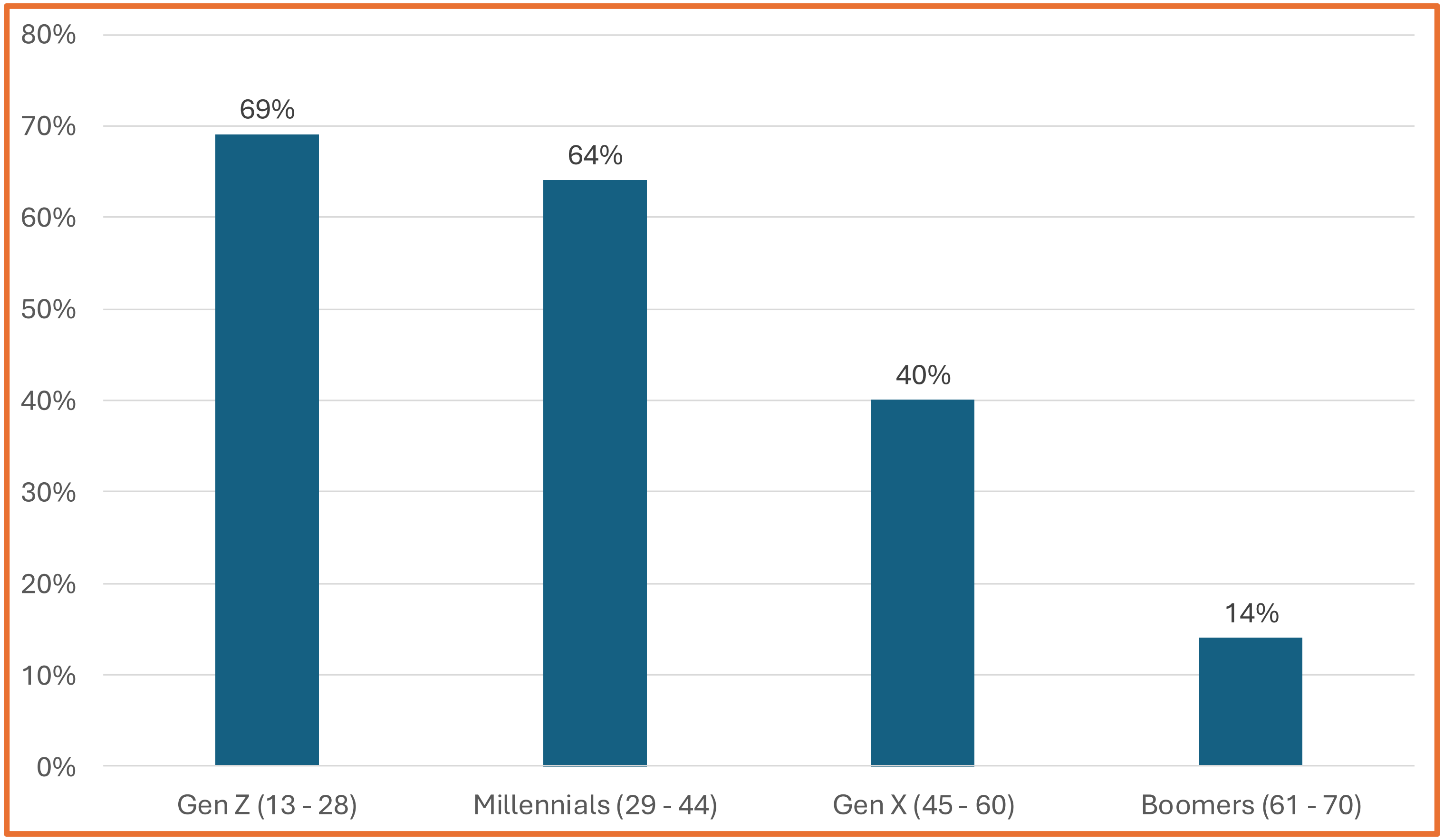
BACK TO DISCUSSION

Agenda – January 28, 2025

• Welcome, Introductions Housekeeping	James Maxey	9:30 – 9:40
• Opening Comments	Gray Taylor, Myra Kressner, & Roy Strasburger	9:40 – 9:50
• Review Nov 14th meeting Key NRF take-aways	All Gray Taylor, Myra Kressner	9:50-10:15
• Third Party Delivery Case Study	Jeff Keune , 4910 Consulting	10:15 – 10:45
• Group Discussion	All	10:45 – 11:20
• Closing Comments	Gray Taylor, Myra Kressner, & Roy Strasburger	11:20 – 11:30

BACK TO DISCUSSION

Food Deliver App Use by Generation (2024 data)



https://www.owner.com/blog/food-delivery-statistics

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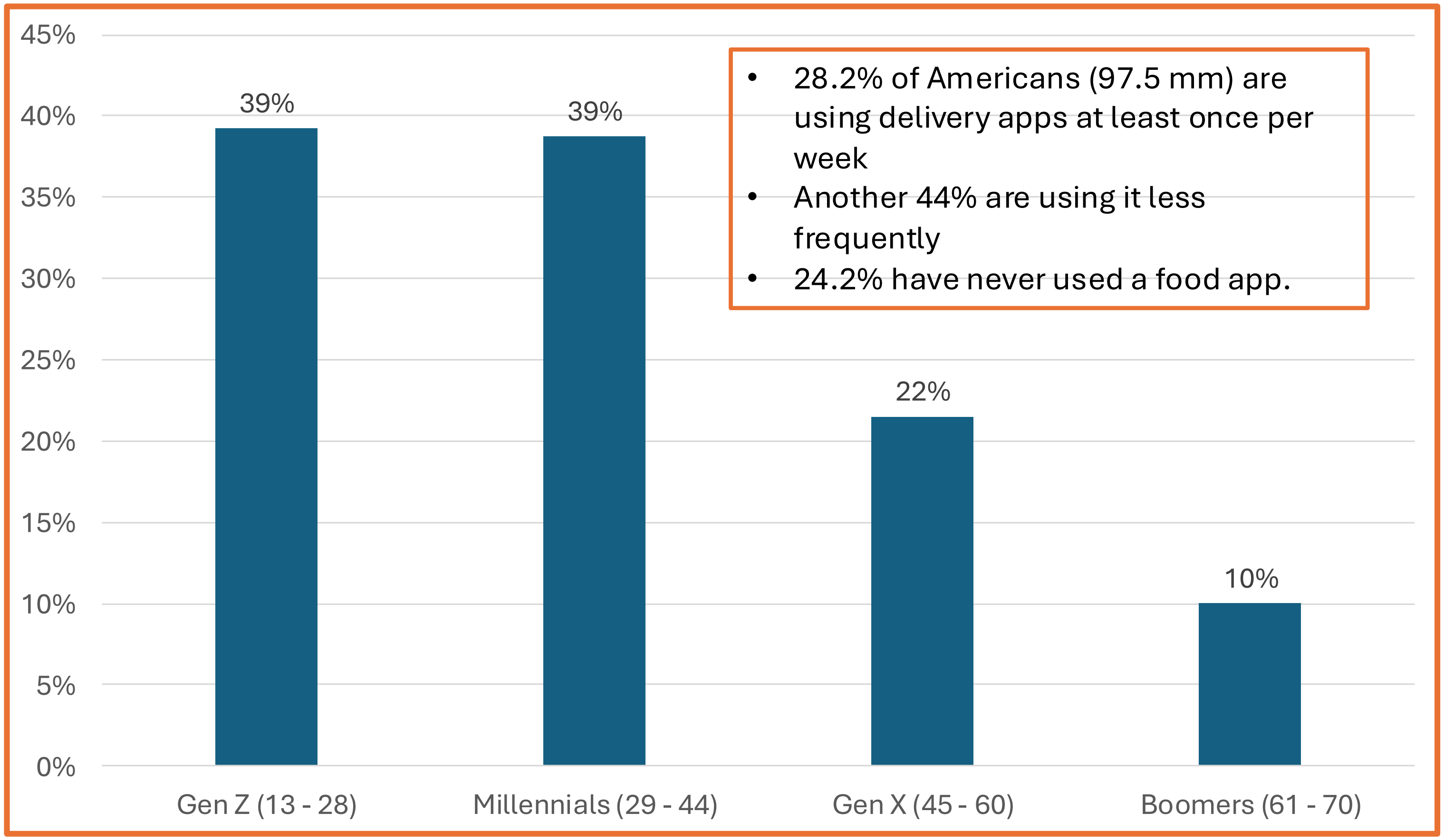
Food Deliver App Usage at Least Once Per Week



https://business.yougov.com/content/51282-exploring-americas-appetite-for-food-delivery-apps

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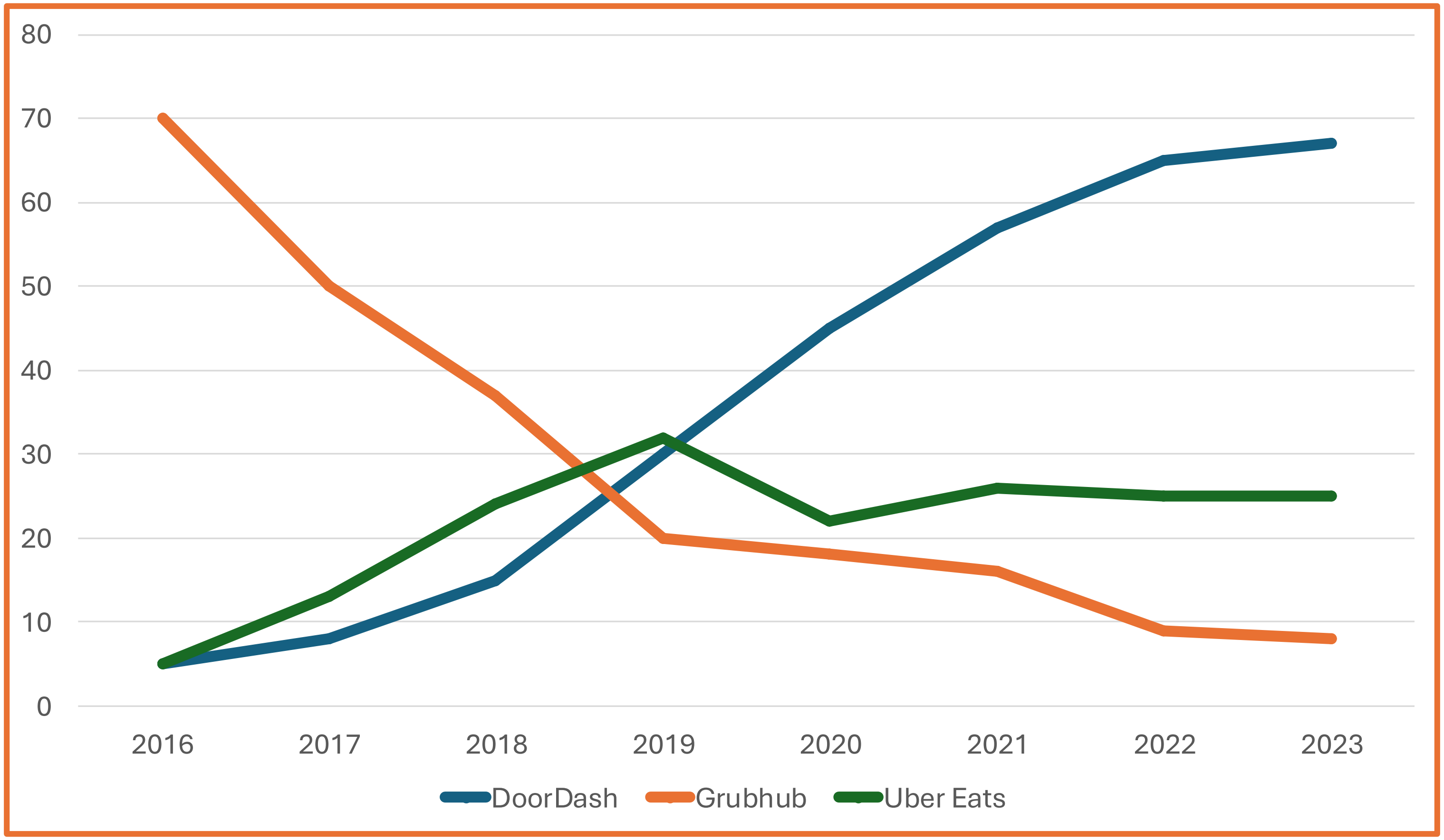
CxVG Views | In The Room with CxVG | Presentations

Food Delivery Market Share Percentage



https://www.businessofapps.com/data/doordash-statistics/

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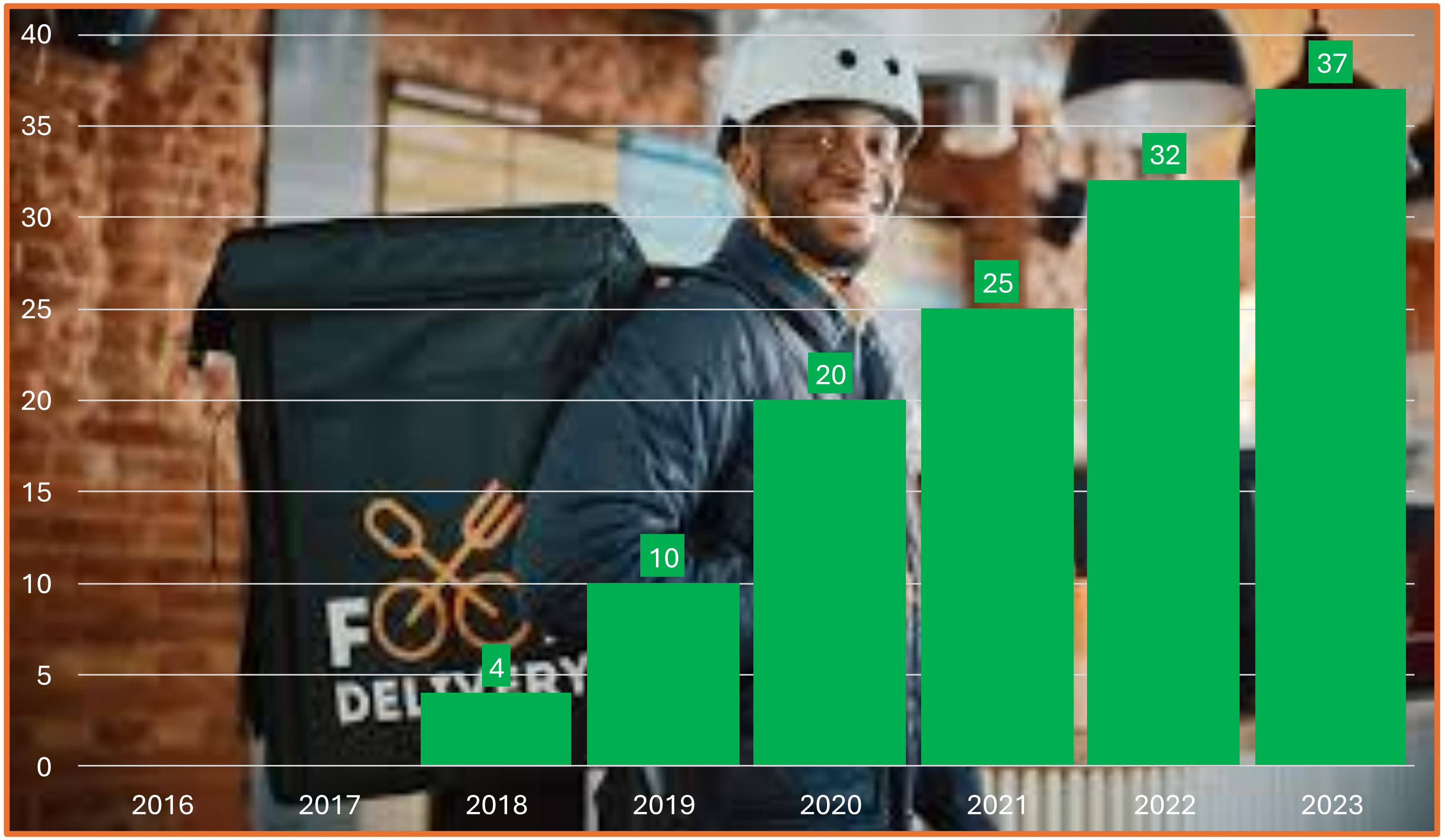
DoorDash Users (millions)



https://www.businessofapps.com/data/doordash-statistics/

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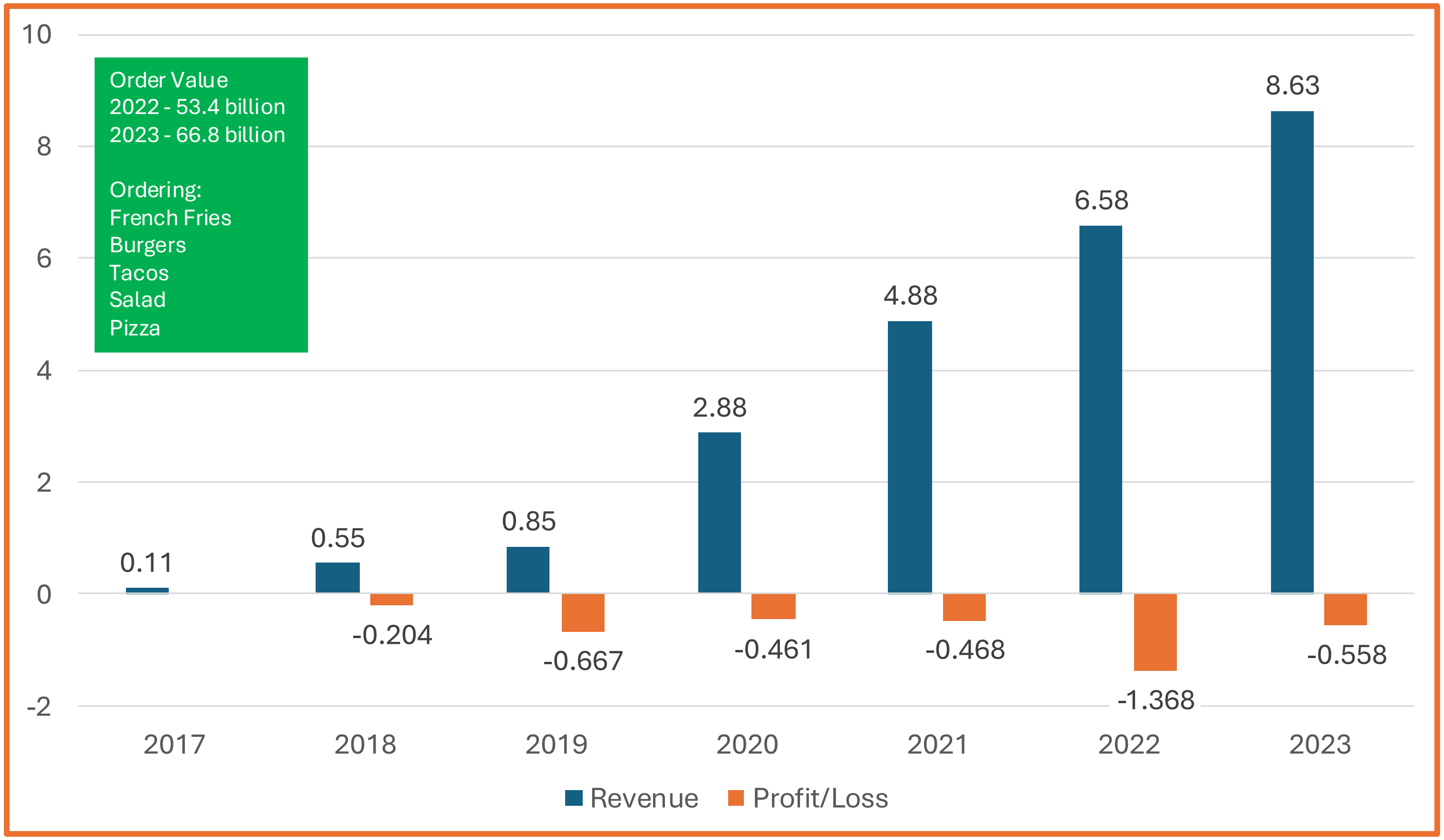
DoorDash Revenue ($bn)



https://www.businessofapps.com/data/doordash-statistics/ & https://www.owner.com/blog/food-delivery-statistics

American Natural

Food Forward Convenience Concept and Case Study on Third Party Delivery

January 28, 2025

BACK TO DISCUSSION

Jeff Keune / 4910 Consulting Retail and Restaurant Consulting

Understanding the growing intersection of Convenience Retail and Quick-Service Restaurants (QSR)

- **Rising consumer expectations**
- **Industry overlap**

As consumer expectations for *faster delivery, superior quality, and enhanced accessibility* rise, the synergy between these industries will grow and leaders with deep expertise in both will be necessary to compete.

With extensive experience across both sectors, I bring a unique ability to *understand, adapt, and lead brands* toward sustainable growth and evolution, securing their position in an ever-changing marketplace.

$$\frac{\textbf{Product} + \textbf{Service} + \textbf{Image}}{\textbf{Price}\ \mathbf{X}\ \textbf{Communication}} = \textbf{Retail Consumer Confidence}$$

Experience Snapshot

- 10 Years in **Convenience Retail Leadership**, Former President of American Natural.
- 16 Years in **Restaurant Industry**: Roles from Brand Manager to CMO (including Starbucks Store Manager).
- 4 Years in **CPG Brand Management**: Hallmark and Heinz.
- A proven ability to adapt and guide brands through growth and evolution to secure long-term success

Marketplace and Consumer Assumptions

- Other retail options are available and are constantly improving
- Everything you do and don’t do builds or erodes brand value and consumer trust
- Consumers can be forgiving if you have earned their trust

BACK TO DISCUSSION

American Natural Case Study:
Fast Casual Convenience (produced)

BACK TO DISCUSSION

American Natural Case Study:
Fast Casual Breakfast, Lunch, Beverages

BACK TO DISCUSSION

CxVG Views | In The Room with CxVG | Presentations

American Natural Case Study:

Unique Food and Beverage promotions + traditional promotions

BACK TO DISCUSSION

American Natural Case Study:

Unique Food and Beverage promotions + traditional promotions

BACK TO DISCUSSION

American Natural Case Study:
Loyalty Program

BACK TO DISCUSSION

American Natural Case Study:
Example Loyalty Employee (produced)

BACK TO DISCUSSION

Third Party Ordering Strategy & Actions

Insight	Action	Results / Outcomes
Third Party is leveraged by consumers and competition in the region (GetGo & Sheetz)	• Leverage the Fast Casual Food Platform inside the store and with third party deliver	• Third Party available for all dayparts • While at times small, the third party orders drove incremental sales *(3% - 5%+)* • Complexity was not prohibative
Consumers are using multiple third party platforms with no clear preference	• Activate all third party systems and ensure the teams are monitoring the tablets in all dayparts (Door Dash (biggest vendor), Uber Eats, Chow Now)	• Team members executed well at all dayparts. • Once food was made it was set up in a kiosk for the third party team member to pick up and deliver • Consumer expectation was not that the product be “hot and fresh” and any issues were put on the driver not the brand
With the strong execution of third-party individual delivery, the team felt confident in growing a Catering Business	• Growing catering was a key performance challenge to the store managers. • Catering targets were local schools and local organizations with some orders coming from local businesses	• Catering was a strong incremental contributor to weekly performance as a it was a larger sale. • Store manager who developed local relationships with schools and business saw stronger success in catering

BACK TO DISCUSSION

Door Dash is the Leading Contributor

Door Dash	Performance
Door Dash leads Food Delivery Market (ref Aug 2023)	• Door dash at the time of the survey led the food delivery market in the United States with an approximate market share of 65%, with Uber Eats following with a share of approx. 25%
Orders Per week	• Door Dash Averages 60 orders per week for the 6 stores offering • Door Dash states 86% of consumers in their survey reported ordering a third party delivery order at least twice per month
Average Ticket Price	• Average ticket price is $19.43 per order compared to National Average of $20
Mark-up	• Door Dash Mark-up is 2% from the in-store price
Promotions	• According to Door Dash Data, businesses can typically see a 20% increase in orders through using their promotional features

BACK TO DISCUSSION

American Natural Example Appendix

Marketing Strategy and Activation

Insight	Action	From	To
Despite investment in Television Media that drove awareness, Performance did not meet expectations	• Change Consumer Target and Positioning	• For Soccer Moms we offer a European Café with unique flavors, menu items and merchandise	• For the Core Convenience & QSR consumers we offer Fast Casual Convenience
Our investment in TV was positively received but did not convert transactions	• Broaden Activation Plan	• TV & Social	• TV, Social, Store Sign Packages, Evolve Branding, Local Activation
Menu and Order System are not supporting transaction growth	• Re-develop the Menu to add products with broader appeal • Update the Order System with new descriptions and flow	• Unique flavors meant to be different than other Fast Casual / QSR / C-store Menus • Little or No lower priced options or promotions • Order System is not consumer friendly and is without descriptions	• Develop products with high quality, but with fewer unique ingredients • Develop a menu with a range of price points including a Value tier / promotions
Brand is engaging locally, but does not have a Local Activation Strategy	• Actively Seek out and invest in local sponsorships	• Decide to sponsor local events when asked	• Actively support brand awareness and perception through sponsorships and developing a Cause

American Natural Case Study:

Example Exterior Concepts

(not produced)

American Natural Case Study:
Example Bollard Concepts
(not produced)

The Conexxus Vision Group (CxVG) brings together convenience leaders for quarterly virtual meetings. CxVG has been created to expand Conexxus' retailer and supplier engagement and amplify Conexxus' goals and achievements and will identify strategic technology innovations regarding convenience/mobility industry issues, technologies, and practices. The group is committed to sharing its views and perspectives to advance the convenience retailing and mobility industry. CxVG 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**

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A part of Vision Group Network

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CLVG 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

CLVG 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

CONVENIENCE TECHNOLOGY VISION GROUP

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

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 VISION GROUP disruptive solutions

Loosening the Tight Labor Market
February 2024
Journey to Become an Employer of Choice; Expanding the Applicant Pool; Retaining Employees Though; Skill Growth; A Post-COVID Reality

CONEXXUS VISION GROUP PART OF VISION GROUP NETWORK

Envisioning Technology Innovation in the Convenience Store Future
January 2025
Conexxus, IRC and CxVG, data management, AI, employees, electric vehicle charging

ELECTRIC VEHICLES VISION GROUP

evVG Windows for EV Adoption – Opening or Closing
January 2025
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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