GCVG

GLOBAL CONVENIENCE
VISION GROUP

AN INITIATIVE FROM

THE RETAIL MARKETEERS

VGN VISION GROUP NETWORK

From Convenience to Foodvenience: Adapting to Changing Palates and Production

GCVG VISION REPORT NO. 2
JUNE 2025

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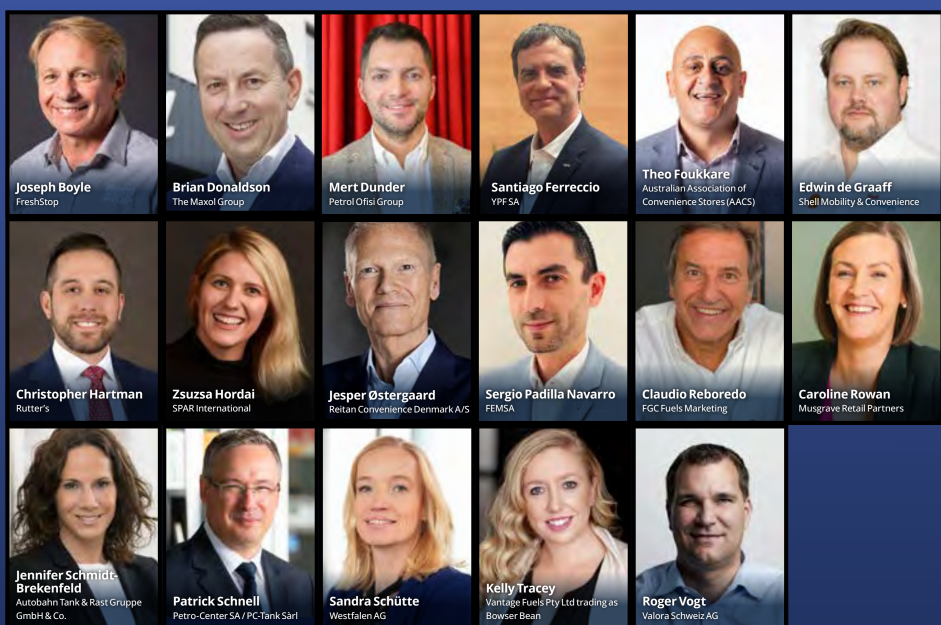

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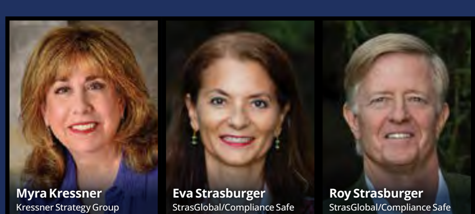

FACILITATOR

Christian Warning
Managing Partner,
The Retail Marketeers

FEATURED SPEAKERS

Roger Vogt
CEO Retail, Valora Schweiz AG

Dr. Tilo Hühn
Professor, Zurich University of Applied Sciences, School of Life Sciences and Facility Management

VGN VISION GROUP NETWORK sharing today to shape tomorrow

We are Global Convenience Vision Group (GCVG), a group of invited leaders of the global convenience industry who have volunteered our time to help our fellow retailers, solution providers and product suppliers. The only reason we gather is to discuss, debate and share our experiences and ideas. Each of us is offering our personal opinions. We are not looking for "group think" — we are promoting problem solving and looking to the future. We make our conversations available to everyone in the industry through GCVG 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 or operating market.

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

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

This GCVG Vision Report includes GCVG Views, a summary of the conversation with additional resources.

NEW!

In The Room With GCVG transcript, the presentation given by Roger Vogt on **Valora Schweiz AG**, and Dr. Tilo Hühn's presentation **"Appetite for Change: GLP-1s, Economics, and the Future of Food Retail,"** are online and searchable by topics. The full meeting transcript is available, so that you can be "in the room" with us, rather than only having access to selected quotes and paraphrasing.

The main topics in this GCVG Vision Report:

Valora: "Foodvenience" as a Growth Strategy

- **Menu Development and Customer Feedback**
- **Payments, Technologies and Retail Media Networks**

Navigating the Changing Palate: Health Shifts, GLP-1s and the Sober Surge

- **Behavioral Shifts and Industry Impact**
- **Rethinking Convenience Across Regions**
- **A New Era in Food Processing**
- **Healthy Demand Meets Economic Reality**

GCVG VIEWS

A GLOBAL CONVENIENCE VISION GROUP DISCUSSION

This meeting of the Global Convenience Vision Group (GCVG) focused on future trends in food, including the impact of health shifts, new production technologies, and changing consumer behavior.

The May 6, 2025, GCVG quarterly virtual meeting was facilitated by **Christian Warning**, founder and managing partner, The Retail Marketeers. The meeting featured two guest speakers. **Roger Vogt**, CEO Retail, Valora Schweiz AG, shared an in-depth presentation on his business. Also, **Dr. Tilo Hühn**, professor at Zurich University of Applied Sciences, School of Life Sciences and Facility Management, shared his presentation, "Appetite for Change: GLP-1s, Economics, and the Future of Food Retail," which focused on how changing consumer behavior, influenced by health trends and the impact of pharmaceuticals like GLP-1 drugs, is shifting food consumption toward healthier options.

Valora: "Foodvenience" as a Growth Strategy

Vogt, who oversees Valora Retail as part of the FEMSA group's European arm, discussed the company's significant presence with over 2,000 convenience stores across Switzerland, Germany, Luxembourg and Austria, employing nearly 15,000 people. With 30 years of retail experience, having started as a store manager, Vogt highlighted Valora's core strength: bringing together traditional convenience retail and food service concepts, a strategy he calls "foodvenience." The goal is to create more value for the customer by combining the know-how of both areas.

He presented several of Valora's brands, including "k kiosk" (Switzerland's market leader, adapting from traditional items like newspapers and tobacco to more food), Press & Books (important on main railway stations and airports in Germany) and its leading convenience format, "avec," which grew from 150 to over 350 stores in Switzerland in just five years, with expansion into Germany underway.

Vogt showcased two exemplary "avec" locations. A BP gas station in Horgen that offers spectacular views of Lake Zurich, serves over 1,300 customers daily, and sells approximately 80 kitchen items each day. This location generates 63% of its revenue from food and beverages, with fresh products accounting for nearly 50% of sales. Meanwhile, an inner-city Zurich location near universities serves an average of 1,600 customers daily, peaking at 2,500 during school sessions. This store sells about 200 kitchen items each day, with nearly 90% of its revenue coming from food, demonstrating how effectively its integrated kitchen concept works in urban settings.

Valora is also integrating its foodservice brands like BackWerk and Brezelkönig as "clip-ins" into its convenience stores and service stations.

Menu Development and Customer Feedback

Richard Poye, COO of Food Trends Think Tank and facilitator of the Convenience Foodservice Vision Group (CFVG), asked Vogt about the menu development process for new concepts. Vogt explained that it leverages successful items already in their foodservice concepts. Menu decisions balance items that can be quickly produced (e.g., heating up pre-prepared items like a hot panini) with items worth preparing fresh (like sandwiches). The assortment is refined based on customer feedback.

Kitchen opening hours and their impact on morning peak sales at petrol sites was a key point of discussion, with **Sandra Schütte**, head of mobility at Westfalen AG, asking how breakfast is managed given an 11:00 a.m. start from the kitchen foodservice counter. Vogt clarified that the kitchen concept focuses on the lunch peak as an additional offer to the traditional breakfast offer where customers primarily buy traditional grab-and-go items like croissants, coffee, and sandwiches. They found that during the morning, the kitchen offer wasn't utilized and reduced kitchen hours to focus only on lunchtime, which increased profitability.

Kelly Tracey, general manager of Vantage Fuels Pty Ltd, dba Bowser Bean, asked about the required kitchen footprint and how consistency would be ensured when scaling the kitchen concept. Vogt confirmed the kitchen size is around 10 square meters, and it plans to scale the model. Consistency relies on online staff education, a dedicated quality/process manager and designing all kitchen processes to be very simple and easy for store teams to execute.

Other Vision Groups have discussed topics like Retail Media Networks, GLP-1 drugs, health shifts and more. Here is a list of relevant reports available.

The Skinny on GLP-1s and Their Impact on the Convenience Industry, May 2025

CTVG Pivotal Moments for Convenience Foodservice Technology, April 2025

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

CLVG Expecting the Unexpected: Foreseeing Potential Disruptions, November 2024

CTVG Retail Media Networks, July 2024

Payments, Technologies and Retail Media Networks

Mert Dunder, head of operational technology at Petrol Ofisi Group, asked about managing different payment technologies across countries and the use of mobile payments. Vogt said Valora is standardizing payment by replacing third-party terminals with its own self-checkout solution across most European stores. This enables an easier rollout of new services. He confirmed it has a mobile app that allows customers to scan products and pay on their phone. However, the app hasn't been as successful as self-checkout in Switzerland, where customers seem to prefer using the physical terminal. **Brian Donaldson**, CEO of The Maxol Group, asked whether self-checkouts could handle fuel payment. Regarding self-checkout, Vogt said in its Zurich inner city location store, the share of people using the self-checkout is described as "unbelievable," above 60%. However, it tried and failed to integrate self-checkout with fuel payment at one service station and noted another station also reportedly failed, indicating it's an ongoing industry challenge.

Robert Hampton, director of strategic growth and initiatives for the Vision Group Network, asked for clarification on the mobile app, specifically if it allows scan-and-walk-out payment. Vogt confirmed that it does allow customers to scan items and pay on their phone, enabling unmanned access outside regular hours. He reiterated that its adoption is lower than self-checkout usage. **Theo Foukkare**, CEO of the Australian Association of Convenience Stores, mentioned that 7-Eleven in Australia has experienced similar difficulties with customer adoption of their scan-and-walk-out app, agreeing it's a challenge despite the technology being available.

Zsuzsa Hordai, head of strategic projects at SPAR International, asked about Valora's strategy for retail media networks as a potential revenue stream. Vogt explained Valora's parent company, FEMSA, is successful with retail media. In Switzerland, Valora found it more effective to bundle screen time with traditional promotions (like shelf space) for suppliers rather than selling retail media space alone. They paused progress but are exploring it again, partly because restrictions on tobacco advertising are freeing up screen space. Later in the conversation, **Sergio Padilla Navarro**, global networks director, FEMSA Mexico, emphasized that FEMSA runs a successful retail media business in Mexico with its own profit and loss structure. Warning highlighted the booming growth of retail media, citing Walmart's projected $5 billion revenue from its network this year. He noted that many convenience and grocery retailers are exploring similar opportunities. Foukkare confirmed the trend is happening in Australia, stating that Woolworths is leading the charge in retail media among Australian supermarkets, far ahead of competitors. However, he noted that within the convenience sector, while digital displays are being adopted more widely—both outside and inside stores—no one in Australia seems to be doing it particularly well yet.

Learn more about FEMSA's retail media business, Retina Media, and explore available resources at **www.femsa.com/retailmedia**. The platform showcases how FEMSA is leveraging digital channels to drive revenue and connect with consumers in new ways.

Navigating the Changing Palate: **Health Shifts, GLP-1s and the Sober Surge**

> “[Approximately] 6 million people are using GLP-1’s in the U.S., and they estimate that around the end of the decade it could be 40 million or more.
>
> This will have a heavy impact on consumption profile of different foodstuff we find at the market.
>
> ***Dr. Tilo Hühn**, Professor, Zurich University of Applied Sciences*

Dr. Tilo Hühn, a leading food architect and professor, presented insights into the future of food processing and how consumer trends, particularly health and economic pressures, are impacting the food retail landscape. Drawing on his extensive experience in food processing development, Dr. Hühn highlighted innovations designed to meet evolving demands and address challenges in raw material production. The presentation addressed significant market shifts, including the impact of new weight-loss medications like GLP-1 receptor agonists (e.g., Ozempic, Wegovy). These pharmaceuticals suppress appetite and alter food preferences, leading to a reduction in overall consumer spending on food, notably in categories like snacks, sweets, and less healthy options. Studies indicate a decline in spending at both grocery and fast-food outlets, with some of the largest reductions seen in products like chips, baked goods, and cookies. While overall spending decreases, there’s a potential for a slight increase or less significant decrease in healthier items such as yogurt, fresh produce, lean meats, eggs, and nuts.

Economic pressures also contribute to a “trading down” effect, where consumers seek more budget-conscious food choices. In specific markets, affordable, culturally accepted fermented, non-traditional foods could become more relevant as alternatives to more expensive conventional options. The adoption of such foods depends highly on regional economics, cultural perceptions, and their relative cost and perceived value. Another trend highlighted is the “Sober Surge,” indicating a shift away from traditional alcohol sales toward no and low-alcohol alternatives, particularly among younger generations.To navigate these changes and address sustainability and raw material challenges, Dr. Hühn presented several innovative processing methods. He detailed a cold extraction process for cocoa beans, which uses water and low temperatures (<65°C) instead of traditional roasting. This method preserves more aroma and beneficial flavanols that are typically destroyed by heat. It also reduces the sour and bitter impact of cocoa. Dr. Hühn noted the benefit, explaining, "…by washing it with water, we can reduce the sour and bitter impact. So we can offer 80% chocolate, which is expensive for sure, but with only 20% of sugar, which is a very important effect if you want to reduce the sugar content."

He also introduced the concept of cellular agriculture for producing food components in bioreactors, such as cocoa cells, which can be grown in two to three weeks. This approach offers a controlled environment to ensure raw material availability and composition, mitigating challenges like crop failure and variations in natural raw materials.

Dr. Hühn also presented the RE-NUT® method, a patent-protected technology for processing culinary nuts "in-shell." This innovative process, which can include the fruit flesh for stone fruits like almonds, significantly increases the yield of valuable fiber and protein compared to traditional methods. This method produces plant-based drinks and high-fiber solids, aligning with the growing consumer demand for such products.

Finally, the presentation touched upon the importance of fermentation, linking it to pre-digestion and the microbiome, and noting its potential role as an affordable, nutritious option in certain contexts. These innovations collectively aim to offer solutions for healthier, more sustainable, and reliable food production in response to changing consumer behavior and global challenges.

Behavioral Shifts and Industry Impact

Roy Strasburger, CEO of StrasGlobal, president of Compliance Safe, and Vision Group Network co-founder, initiated the discussion by linking Dr. Hühn's points on fermentation and "trading down" to whether consumers are buying less expensive products or simply adding new, potentially fermented, items to their baskets. Dr. Hühn discussed the significant behavioral changes in customers. He specifically cited a publication from the U.S. wine industry indicating that Gen Z may be influencing a new positioning for the wine sector. He noted seeing unharvested grapes in California and said the world wine market could decrease by 40% in the next five years because young people are deciding not to drink alcohol, according to studies from Zurich University of Applied Sciences. He mentioned studies from the University of Zurich that show young people consuming other drugs, but alcohol is "really under pressure."

"We estimate that in the next five years the world wine market could go down by 40%. This is a disaster. But this is happening because young people have decided not to drink alcohol anymore.

***Dr. Tilo Hühn**, Professor, Zurich University of Applied Sciences*

> Clearly, the younger consumer today is a lot more health conscious than the majority of us were when we were at that same stage in our life. [...] Will they maintain their views as they change [through] different stages of their life?
>
> ***Theo Foukkare,*** *Chief Executive Officer, Australian Association of Convenience Stores*

Dr. Hühn linked these behavioral changes to a focus on longevity and health, suggesting that the COVID-19 crisis made both young and old people realize the finitude of life, prompting reflection on how to live a "long, healthy life." He contrasted his own enduring temptation for french fries and wine with the more controlled eating habits he observes in his daughters. Dr. Hühn suggested this trend could change impulse buying behavior and influence the order of products offered in stores, recommending retailers look into offering healthier products, referencing past investments in vegetarian and vegan food.

Later in the conversation, Foukkare highlighted a significant concern in the confectionery industry regarding the impact of GLP-1s on consumer consumption behavior. He noted that their predominant focus for managing this is on portion control, snacking, and smaller sizes to allow for "smaller indulgence." Foukkare also raised the question about whether the noted health consciousness of the younger consumer will persist as they age.

Rethinking Convenience Across Regions

Noticing the parallels between the first GCVG meeting and Dr. Hühn's presentations, Poye discussed the challenge of servicing different types of consumers. He elaborated on the U.S. complexity, noting the different channels (convenience stores, QSR, fast casual, fine dining) and how people use them differently. He contrasted this with his experience in Germany, where convenience stores, particularly at train stations, were often a "more elevated and more high-oriented offer." He emphasized the strategic challenge for retailers in deciding who to serve and how to pivot menus to be more effective.

Poye also proposed a Venn diagram model to understand consumer segments: those who use GLP-1 drugs, those who are contrarians and prefer fermented foods, those who constantly chase new diets or trends without discipline, and those who are oblivious to the effects of their diet. He stressed the complexity of focusing on who retailers are truly serving, given variations even within a single country.

Strasburger provided the perspective from the United States convenience industry, stating that it is generally "behind" Europe, Australia, and South America in foodservice and healthy food offerings. He described the U.S. convenience retailing focus on snacking and immediate impulse items, questioning how the shift toward healthy products will impact shelf space and product extension given this specific focus.

> The shift toward more of a healthy product perspective is going to be a big question in the United States in regard to shelf space, product extension, being able to provide that because we're so geared toward a very specific impulse aspect of what we're doing.
>
> ***Roy Strasburger,*** *CEO, StrasGlobal, President, Compliance Safe, and Vision Group Network Co-Founder*

Foukkare shared insights from Australia, explaining how 7-Eleven has implemented a daily fresh supply chain to offer healthy food options for health-conscious and Gen Z customers. He noted the challenge of maintaining consistent offerings as customers become more mobile across different areas.

Joseph Boyle, CEO of FreshStop, commented on the paradox in South Africa where, despite being perceived less healthy, fresh produce like avocados and bananas are readily available in street markets. He described their "theater of food" with street markets offering fresh produce and supermarkets featuring butchery sections. He then asked Dr. Hühn about whether his innovations can maintain the food theater and the "fun aspect of food" while incorporating healthier elements. Dr. Hühn responded that indulgence is "absolutely important." He affirmed that his processes are built to produce "signature taste" alongside health contributions. He used the example of his chocolate process, explaining that it allows differentiation of cocoa bean origin and vintage, similar to wine-making (his original field), leveraging expectations of high-quality food while contributing to health and longevity.

A New Era in Food Processing

Boyle also asked about maximizing the health value of products, taking the concept of the RE-NUT® process that Dr. Hühn described and using a banana peel instead of an almond skin, for example, particularly for potential application in "third world countries" to improve nutrient value. Dr. Hühn explained that the shift from industrial specialization—often guided by "Taylorism," which emphasized efficiency through narrowly segmented tasks and streamlined value chains—back toward a "holistic view" on raw material processing. The goal is to valorize "all streams as mainstream" and make them usable for human consumption "as much as we can," using the whole nut as an example.

Warning asked about scalability and how reducing production costs for new food products could impact retailer margins. Dr. Hühn confirmed that their continuous working systems are "really scalable." He explained that his approach uses continuous production systems rather than batch production, with high scalability. He described his "labtory" (laboratory + factory) with over 6,000 data points meeting pharmaceutical standards, and how they're implementing machine learning for self-optimization. He noted that their decanterous systems can scale up to 80 tons per hour. He provided an example of processing coffee beans to extract fat that creates a "vegan coffee" that looks and tastes like it contains milk due to the fat forming an emulsion and preserving aroma.

Healthy Demand Meets Economic Reality

Warning suggested that convenience retailers have new opportunities due to their "one-stop shopping position." He argued that convenience stores don't have to abandon existing businesses like burgers and pizzas, but rather "add on new opportunities to win new target groups" as consumer behavior changes. He noted that convenience retailers are "far behind" supermarkets or fresh chains in many countries when it comes to healthy food options.

Hordai concurred with the observation about the decline in wine consumption across various markets, including Central Asian countries. She acknowledged the customer push for healthier products but highlighted the significant challenges of the cost-of-living crisis and squeezed wallets. She described the situation as an "ambiguous one" because there is demand for healthier options, but they are often more expensive than mainstream options, limiting who is willing and able to afford them.

> Let's make money with burgers and pizzas, of course, but the consumer is changing, and we have to add on new opportunities to win new target groups.
>
> ***Christian Warning,** GCVG Facilitator and Founder and Managing Partner, The Retail Marketeers*

> It's a very interesting equation because there is a demand, but who is willing to pay for it and who can afford those products, which are usually pricier than the mainstream?
>
> ***Zsuzsa Hordai,** Head of Strategic Projects, SPAR International*

Final Reflection

The conversation ultimately pointed to the need for convenience retailers to balance multiple considerations: adapting product offerings to changing consumer preferences, maintaining the "theater" and enjoyment aspects of food, addressing regional variations in consumer expectations, and finding economically sustainable ways to meet health-conscious demand. Success in this changing landscape will require retailers to be both agile in responding to consumer trends and strategic in how they position themselves within the broader food retail ecosystem.

NOTABLE AND QUOTABLE

"I read a publication from the U.S. wine industry and they said that Generation Z, if that exists, trains them to make a new positioning of the whole wine sector. I was over there in California, and I've seen miles and miles where grapes are not harvested. So we estimate that in the next five years, the world wine market could go down by 40%.
***Tilo Hühn**, Professor, Zurich University of Applied Sciences, School of Life Sciences and Facility Management*

"If you develop new food, price parity is important, and besides price, taste is absolutely king.
***Tilo Hühn**, Professor, Zurich University of Applied Sciences, School of Life Sciences and Facility Management*

"I think we forget that if a new trend comes up, like healthier food, that it does not mean that we need to stop a well-established business. We have that discussion a lot in Germany in terms of percentage of sales of tobacco; let's make money with tobacco as long as we're allowed to.
***Christian Warning**, GCVG Facilitator and Founder and Managing Partner, The Retail Marketeers*

"It's unbelievable. The share of people who use self-checkout is above 60%. So it's unbelievable how they use that. And now we have a queue on the self-checkout, not on the cashier desk. And we will now add additional self-checkout. So we already tried to run one self-checkout cashier desk on the service station, but we have to admit we failed because it was not integrated to also pay for fuel...I think it's still a journey, and everybody is learning on that how we can serve the customer with self-checkout in the service station.
***Roger Vogt,** CEO Retail, Valora Schweiz AG*

"When it comes to food innovations and healthy eating, we do also see a big push from the customer's side demanding these products on one side. At the other end, we are still seeing, unfortunately, in most markets the cost-of-living crisis and the aftermath of that. Wallets are being squeezed.
***Zsuzsa Hordai**, Head of Strategic Projects, SPAR International*

"If I look in the streets, we're picking up avocados on street markets, we're picking up bananas on street markets. If I look at our differential and our supermarkets, it's a theater of food.
***Joseph Boyle**, CEO, FreshStop*

"Clearly the younger consumer today is a lot more health conscious than the majority of us were when we were at that same stage in our life.
***Theo Foukkare,** Chief Executive Officer, Australian Association of Convenience Stores (AACS)*

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Meeting Presentations and Demonstration Videos

Christian Warning
GCVG Facilitator and Founder and Managing Partner, The Retail Marketeers, Germany

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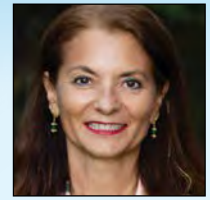
MEMBERS

VISION GROUP NETWORK CO-FOUNDERS

Myra Kressner
President, Kressner Strategy Group, United States



Eva Strasburger
President, StrasGlobal; CEO, Compliance Safe, United States

Roy Strasburger
CEO, StrasGlobal; President, Compliance Safe, United States

Joseph Boyle
CEO, FreshStop, South Africa

Brian Donaldson
CEO, The Maxol Group, Ireland

Mert Dunder
Head of Operational Technology, Petrol Ofisi Group, Turkey

Santiago Ferreccio
Head YPF FULL, YPF SA, Argentina

Theo Foukkare
Chief Executive Officer, Australian Association of Convenience Stores (AACS), Australia

Edwin de Graaff
Global Head of Shop Format & Innovation, Shell Mobility & Convenience, Netherlands

Christopher Hartman
Vice President of Fuels, Advertising, and Development, Rutter's, United States

Zsuzsa Hordai
Head of Strategic Projects, SPAR International, Netherlands

Jesper Østergaard
CEO, Reitan Convenience Denmark A/S, Denmark

Sergio Padilla Navarro
Global Networks Director, FEMSA Mexico

Claudio Reboredo
Partner – Owner, FGC Fuels Marketing, Argentina

Caroline Rowan
Head of Retail Operations, Musgrave Retail Partners, United Kingdom

Jennifer Schmidt Brekenfeld
Geschäftsführerin Tank & Rast GmbH, Autobahn Tank & Rast Gruppe GmbH & Co. KG, Germany

Patrick Schnell
General Manager, Petro-Center SA / PC-Tank Sàrl, Luxembourg

Sandra Schütte
Head of Mobility, Westfalen AG, Germany

Kelly Tracey
General Manager, Vantage Fuels Pty Ltd trading as Bowser Bean, Australia

Roger Vogt
CEO Retail, Valora Schweiz AG, Switzerland

The Global Convenience Vision Group (GCVG) brings together retailers and solution providers from around the globe. GCVG participants are leaders in their national markets and often operate in multiple countries. The group addresses new product introductions, marketing channels and social media, innovations in retail technology, sustainability, cost efficiency and margin improvement, consumer trends, and proposed legislation. The group is committed to sharing its views and perspectives to advance convenience retailing. GCVG 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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VGN VISION GROUP NETWORK

For more information about Vision Group Network email us:

Myra Kressner
myra.kressner@vgnsharing.com

Eva Strasburger
eva.strasburger@vgnsharing.com

Roy Strasburger
roy.strasburger@vgnsharing.com

VGN VISION GROUP NETWORK sharing **today** to shape **tomorrow**

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