



An Expanding **Vision**

2018 YEAR-END REPORT

An Expanding Vision

By the close of 2018, the convenience services industry had reached a new level of influence and success. Armed with compelling research, a strong brand, and deepening relationships with partners and stakeholders, NAMA was able to amplify its message and impact. The results were more favorable legislative and regulatory outcomes, greater resources and exposure for member businesses, and a more cohesive industry overall.

GOVERNMENT AFFAIRS

Fly-In

Stronger engagement and positive regulatory outcomes established NAMA's 4th annual [Fly-In](#) as a "must attend" for members. Nearly 300 registered attendees from more than 35 states served as ambassadors for the industry in 230 meetings with elected officials.

Data from [economic research](#) funded by the NAMA Foundation was formally unveiled at the National Press Club and provided effective talking points in congressional meetings, enhancing the industry's image on Capitol Hill. Another highlight was greater Fly-In participation from equipment manufacturers, helping to advance NAMA's positioning on refrigerant restrictions and ENERGY STAR specifications at the EPA.



Relationship-building at the 2018 Fly-In resulted in visits by members of Congress or their staff to four NAMA member businesses, delivering value and visibility for these companies and the industry. The visits were to Total Vend (left), Flowers Foods (right), Southern Refreshments, and VendEdge.

National Highlights

VENDING MACHINE REFRIGERATION

- NAMA secured significant support from vending machine manufacturer and beverage supplier members for a high-stakes testing project to address industry challenges around proposed refrigeration requirements. NAMA also created a working group of these members to find solutions to refrigerant restriction and placement issues. These efforts have given the industry important credibility with federal agency officials and the state of California.
- NAMA provided comments to the EPA opposing more stringent ENERGY STAR specifications for vending machines, likely to be enacted in 2019.



COMMERCIAL COFFEE BREWERS

The first commercial batch brewer approved by ENERGY STAR was premiered at NAMA's CTW show in November. Representatives from ENERGY STAR were featured at an education session, underscoring the successful collaboration between the federal agency, NAMA and the industry, which proactively promotes the industry's good work in energy conservation and sustainability.



MICRO MARKETS

NAMA continues to lead the dialogue with the Conference for Food Protection and the FDA to revise and amend the Federal Food Code to include a definition of micro markets and achieve federal preemption, making it easier to define micro markets at the state level and creating savings for both operators and consumers.

OTHER ISSUES

To benefit member companies and their employees, NAMA filed comments in support of a proposed U.S. Department of Labor rule to expand the use of Association Retirement Plans, which would provide retirement savings options to employees of small businesses. NAMA also filed comments with the U.S. Department of Transportation in support of proposed changes to the hours of service regulations, which place limits on commercial truck drivers.

State-Level Strides

MICRO MARKET LEGISLATION

NAMA made significant inroads in protecting micro markets from over-regulation in a number of states. Working with its state councils, the association succeeded in establishing the definition of micro markets and securing legal protections in Maryland, Michigan, Georgia and Wisconsin.

Financial support from NAMA's new Strategic Partner Program helped ensure these successes. NAMA also created a "hot spot" map to prioritize and target the resources devoted to micro market advocacy work.

STATE TAXES

- In Michigan, Pennsylvania and Georgia, NAMA members worked as part of a coalition to successfully pass legislation banning local governments from targeted taxation of food and beverages.
- Coalitions in California and Washington state succeeded in delivering legislation to prevent local entities from imposing grocery taxes, and in Rhode Island, NAMA members assisted in defeating a proposed statewide sweetened beverage tax.



In May, Maryland Governor Larry Hogan signed HB 1087, establishing a uniform definition and licensing requirements for micro market operators throughout the state. As part of the process, Maryland/DC State Council leaders and NAMA members provided testimony before the Maryland House Economic Matters Committee and Senate Finance Committee.

PUBLIC OUTREACH

Branding

“This is Convenience Services,” an emotionally compelling, industry-defining video debuted by NAMA in 2018, served as an effective outreach tool throughout the year. Featured on NAMA’s website, in email signatures and more, the video has proven to have sustaining value, supporting advocacy and external communications efforts. Many NAMA members used the video on their own websites and in new business presentations. Watch it [here](#).

“This Is Convenience Services” Video



90% of those surveyed agreed that the video was a valuable tool in telling the industry’s story

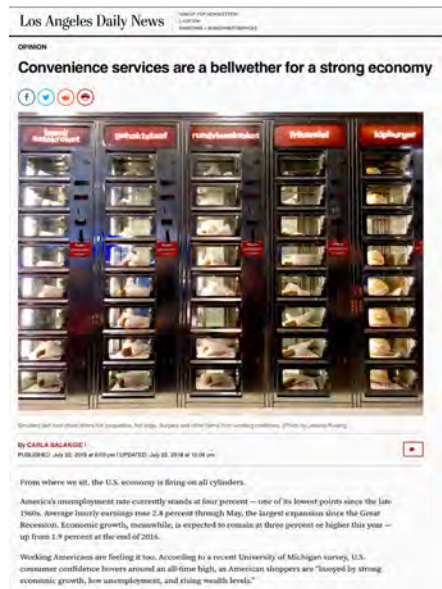
As part of the ongoing strategy to synergize the look and feel of the industry, NAMA collaborated with select state councils to align logos with the overall convenience services brand. Additional logos will launch in 2019.



NAMA Website

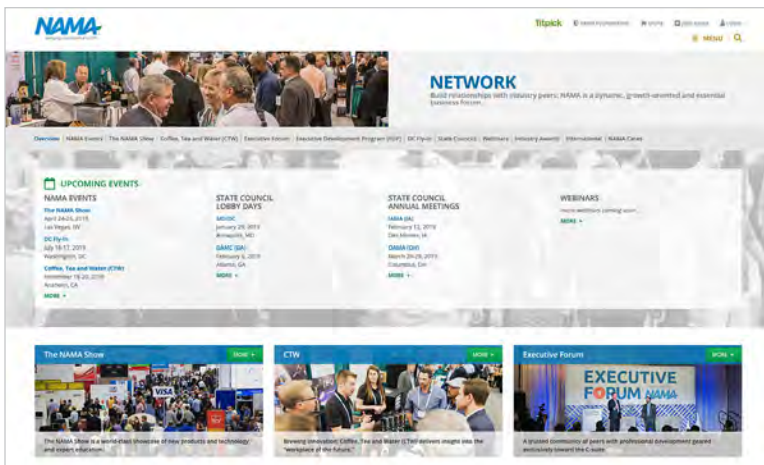
NAMA’s new website, launched at the July Fly-In, has quickly become a hub for NAMA communications, education and more. The fresh content and design, as well as the improved functionality and interactive features, have encouraged greater industry engagement.

This is reflected in a year-over-year comparison of activity: Between July and December, the site received 68,000 page views, and visitors spent an average of 1:47 on a page — 3 times longer than during the same period last year. The top three NAMA pages visited were Network, IMIS Store (for downloading white papers, webinars and other content) and Membership. The mobile-responsive format has also been key, as 25% of users visit the website via phone or tablet.



2018 Media Coverage »

The release of NAMA’s economic impact study offered excellent opportunities for media outreach, including this high-profile [op-ed](#) by Carla Balakgie.



3x Increase in average time spent on a page since the new site launch

ESSENTIAL RESOURCES/EDUCATION

NAMA's education program made a quantum leap in 2018, substantially advancing its goal of equipping operators with essential knowledge for the rapidly evolving business landscape. The association delivered a long-needed refresh to several specialty programs, expanded the number and variety of presentations at signature events, and fully activated its virtual learning offerings.

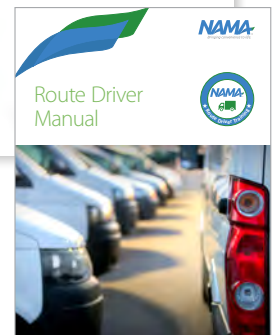
Online Learning

The NAMA Knowledge Center exploded NAMA's delivery of online learning with a variety of offerings, including immersive new modular courses like Mastering Micro Markets and a record 18 webinars. The wide range of webinar topics included everything from employee compensation and effective merchandising to "better for you" snacks. Access them on demand [here](#).



18

Number of webinars
NAMA offered in 2018
— a record



Two essential training programs (Route Driver and Technician Training) were fully updated and deployed online, greatly expanding access to training for industry employees. NAMA's popular Essence of Coffee course (formerly Coffee 101) also underwent a comprehensive update, with the first two modules debuting at CTW.

CTW Education

NAMA delivered an expanded and higher-quality education program for attendees at the 2018 CTW. Of the show's 17 sessions, the most well attended were on the evolving bean-to-cup market and trends in coffee and tea flavors and enhancements. New topics included water as the foundation for the perfect cup of coffee, the growing prominence of tea, and packaging innovations.



140

Number of people who attended
"The Bean to Cup Movement:
How it Supports a Culture of Sustainability"

SIGNATURE EVENTS

CTW

Centered on future success for operators, the 2018 CTW was the best-attended in the event's 11-year history, with over 900 attendees. The show floor also eclipsed past records in square footage, total exhibitors (126) and first-time exhibitors (45).

This year's theme, "Much More Than What's in Your Cup," represented a wider focus, including on new technologies and business trends, and the service and convenience offered by OCS businesses. New event enhancements included the CTW Café, New Product Zone and inaugural People's Choice Awards.

The engaging opening session featured Howard Behar, former president of Starbucks Coffee North America, on the concept of servant leadership and putting employees and customers first. Closing out the show was Jim Watson of Rabobank sharing consumer trends in beverage, growth opportunities in ready-to-drink coffee and the future of bean-to-cup.



"We're not in the coffee business serving people, we're in the people business serving coffee."

—Howard Behar



NAMA Show

The 2018 NAMA Show delivered a memorable experience and robust networking opportunities for 4,400+ attendees. The largest-ever trade show floor included a number of enhancements inspiring greater interaction and business development.

This year's show featured twice as many education sessions as the previous year, arranged by track for more focus and depth.



Kicking the event off in true New Orleans fashion, the NAMA Foundation hosted its first-ever Coffee Crawl. The guided tour through the French Quarter took the group of 93 to renowned establishments like Café du Monde to experience the city's rich coffee culture.

“Where there is disruption, there is great opportunity, particularly for those who innovate.” That was the theme of successive NAMA Show keynotes by futurist Brian Solis and political analyst Matthew Dowd before a standing-room-only crowd. A “power huddle” conversation with the speakers led by Carla Balakgie drove home the value of the discussion.

Things look bright for the 2019 NAMA Show as well, with the trend toward “better for you” offerings driving much of the participation.



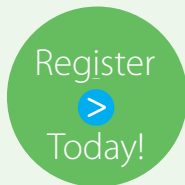
[➤ See the Midyear Report for more 2018 NAMA Show highlights](#)

MEMBERSHIP

As member satisfaction metrics continued to improve, NAMA worked to enhance support for new members, including webinars designed to build a more comprehensive understanding of association benefits and resources.

In addition, the new NAMA website features user-friendly forms, making it more convenient to become a member, apply for volunteer leadership positions, join SIGs like WIN/ELN, and nominate peers for awards. NAMA now receives several inquiries per day, enabling the collection of helpful data and service improvements for members and prospects.

ON DECK THIS SPRING



April 24-26 | Las Vegas, NV

Featuring Keynote Speaker

Mike Walsh

Founder and CEO of Tomorrow

Learn what's coming next and how your business can survive and thrive in an age of accelerating technology.





namanow.org