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RUM NAMA



Leading Transformation, **Building Value**

2017 YEAR-END REPORT

Leading Transformation, Building Value

NAMA concluded 2017 on the upswing, having successfully redefined convenience services — both as an innovative, adaptive industry and as an essential part of the everyday lives of consumers. NAMA emerged as an even stronger leader, influencing public stakeholders through a groundswell of advocacy activity, raising industry visibility through unprecedented social engagement, and arming members with new tools and opportunities through transformative educational experiences.

GOVERNMENT AFFAIRS

Visibility in Washington

The 2017 NAMA Fly-In drew members from across the country to advocate for the convenience services industry. Participation continued to grow, reaching an all-time high of 291, establishing it as one of the best-attended industry fly-ins on Capitol Hill. Participants joined in dozens of meetings with elected officials, making their voices heard on a number of crucial issues affecting their businesses.

Federal Successes

TAX REFORM

Tax reform figured prominently in discussions with legislators at the Fly-in — specifically, the corporate tax rate, the estate tax and how small businesses (often called pass-through entities) are taxed. Several proposals emerged as the year went on, with NAMA continuing to advocate to Congress for relief. In late December, legislation was passed that includes all of the



provisions Fly-In attendees advocated for: a lower corporate tax rate, an estate tax modified to impact a much smaller percentage of filers, and a reduced tax burden for small businesses.

VENDING MACHINE REFRIGERANTS

NAMA made further progress in delaying an EPA phase-out of the chemical currently used in refrigerated vending machines. Industry manufacturers met with EPA officials during the Fly-In to reiterate the need for an extension. NAMA provided additional evidence in follow-up interactions and continues to work rigorously toward a positive outcome for the industry.



40 states represented

291 NAMA members

241 congressional meetings

89% of Senate +
35% of House visited



CALORIE DISCLOSURE

During NAMA's Public Policy Conference in October, members met with the FDA on calorie disclosure issues that remained unresolved: front-of-package font size; labeling for gum, mints and roll candies; and final compliance dates. In December, the FDA drafted a regulation to address these issues based on a "request from industry" — a written statement from NAMA. In January, a NAMA contingent met with the Trump administration to voice support for final action, including an extension that aligns with the Nutrition Facts panel update, to reduce operator costs and liability and limit consumer confusion. This would finalize a multi-year campaign on calorie disclosure and provide certainty and clarity to both operators and food manufacturers.

State-Level Strides

MICRO MARKETS

In the booming micro market channel, NAMA members continued to encounter operational and regulatory challenges brought on by unclear state and local laws and inconsistent enforcement. In 2017, NAMA drafted a model bill to aid states in legislative efforts. The bill defines micro markets and provides guidelines on equipment, maintenance, security and more. Several states, including Georgia, Iowa, Kansas, Maryland and Virginia, used it to begin working toward legislative and regulatory change. Moving ahead, NAMA is collaborating with other interested state councils to advance legislation that will help standardize micro market operations and provide operator clarity.

SWEETENED BEVERAGE TAXES

Scoring a major win for the industry, NAMA continued to fight sweetened beverage taxes in a growing number of states and municipalities. In the Chicago area, NAMA and the Illinois Automatic Merchandising Council worked tirelessly for more than a year against a proposed penny-per-ounce soda tax in Cook County. NAMA members collaborated with allied associations and provided testimony before county commissioners numerous times, not letting down even after the tax went into effect in August. Responding to the groundswell of opposition, in October, the Cook County Commission voted overwhelmingly to repeal the tax. The 15-2 vote made the repeal veto-proof — a milestone victory for convenience services.



At its 8th Public Policy Conference in October, NAMA initiated a number of productive meetings with elected officials, government agencies and coalition partners, all aimed at protecting member businesses and promoting the value of the convenience services industry.



NAMA members make their case against the Cook County penny-per-ounce soda tax in a press conference in August.

INDUSTRY OUTREACH

NAMA continued to expand engagement across new media in 2017, raising greater awareness about the industry and building a sense of excitement about new opportunities and accomplishments.

Social Media

More members than ever shared association- and industry-related posts across multiple social media platforms. Analytics showed that members particularly value stories featuring their peers and the good work being done by individuals in the industry. Among the most popular posts were:

- A tweet featuring the Fly-In contingent on the Capitol steps
- A behind-the-scenes time-lapse video of the show floor coming to life at the 2017 NAMA Show
- A Facebook post about newly named NAMA Coffee Legend Ken Shea



To further extend its reach with target audiences, NAMA launched an Instagram account in the fall. Check it out at [@nama_now!](#)

30,200

LinkedIn

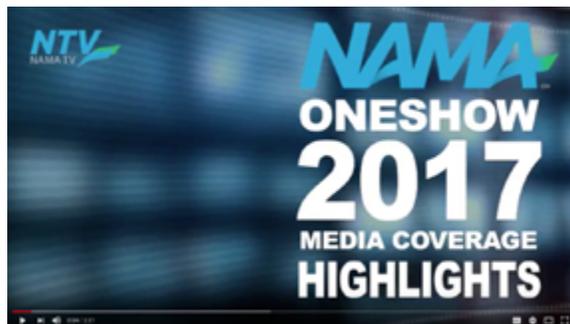
Number of NAMA-related impressions on LinkedIn in April. Posts on the 2017 NAMA Show and Industry Awards drove the record engagement.

Video

NAMA TV evolved in 2017 to use video in a more personal and engaging way. The most-watched clips included a wrap-up of the Washington, DC Fly-In; an overview of NAMA Show media coverage; and an invitation to the Executive Forum in December, delivered by members of the Forum steering committee.



[Watch the video](#)



[Watch the video](#)

PUBLIC OUTREACH

Industry Image

A key goal for 2017 was to continue to broaden public exposure to the convenience services industry. This was accomplished in various ways as NAMA worked to reshape the industry's image, including through trade media, news releases, social media, and in-person meetings and presentations across the country. In addition, significant work was completed on the production of a dynamic video debuting in early 2018 and telling an engaging and memorable story of the convenience services industry and its far-reaching impact, from its employees to the customers it serves.

FitPick

NAMA continued to demonstrate leadership on the wellness front, specifically around promotion of its signature nutrition labeling program, FitPick. This included showcasing the FitPick machine at NAMA's annual DC Fly-In, presentations on the program at industry and public-facing events, as well as interactions with government officials. Specific inroads were made to expand program adoption on government-owned property, engaging public officials from federal to local levels. These initiatives created positive outcomes in Connecticut, Delaware, Louisiana and Minnesota.



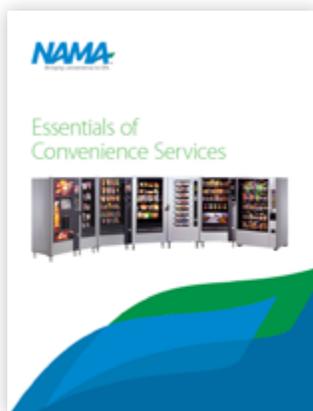
“Broadening our horizons has already been a fundamental part of the journey; we’re really bringing that to

the forefront as we talk about convenience services in a much broader sense than in the past.”

— NAMA Board Chair Heidi Chico

ESSENTIAL RESOURCES

An enhanced online learning platform was unveiled in late 2017, making education more convenient and accessible for member companies.



NAMA
Knowledge Center 

The new **NAMA Knowledge Center** offers a range of certification programs, courses and webinars, bringing members the latest industry know-how and best practices — whenever and wherever they want, 365/24/7.

Along with the Knowledge Center, NAMA introduced a new course designed for those starting out in the industry. “Essentials of Convenience Services” comes with a substantive, step-by-step manual, ideal for newcomers as well as new employees at established businesses.

SIGNATURE EVENTS

CTW

As proof of the building energy and excitement in the coffee, tea and water channel, more than 850 people turned out for the 10th annual CTW show in Grapevine, Texas. Nearly 15% of attendees were first-timers, underscoring the new growth and opportunities in this channel.



A record 125 attended the closing session “Brewing New Business: Overcoming the Amazon Effect.” Of particular interest to operators were examples of successful partnering opportunities shared by 7-Eleven. The overall message: adapt to change or get left behind.

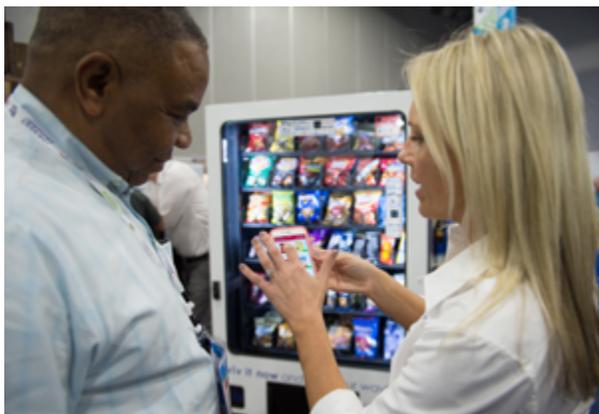


95%

of attendees rated CTW as an excellent or very good experience

Futurist and keynote Jim Carroll challenged attendees to think big when it comes to innovating and embracing trends. That theme carried through many of the breakouts, including standing-room-only sessions on the growing pantry services model, workplace café technology and social media issues, and the consumer trends shaping workplace design and coffee services, presented by Peet’s Coffee.

CTW also offered a community service opportunity for the first time. Participants joined with Clean the World to assemble hygiene kits for victims of Hurricane Harvey.



New Name, New Energy » The 2017 OneShow delivered an innovative and memorable experience for 4,600 attendees — the largest show in five years. See highlights of the rebranded NAMA Show in the [2017 Midyear Report](#).

EXECUTIVE FORUM

NAMA staged its second Executive Forum in December, delivering on its continued commitment to drive the industry forward with game-changing C-suite education and experiences.



Transformative leadership was the theme of the intensive three-day event, which drew nearly 100 convenience services executives to Orlando. Keynotes by the former CEO of Popeyes, an emotional intelligence expert and a world-renowned futurist gave participants valuable insights on both the successes and failures that come with innovation and bold leadership. A top executive from Disney — the best-known happiness brand on the planet — led the group in an immersive experience designed to fuel fresh thinking and disrupt business as usual.

The defining focus of the event was the concept of “forum” — connecting in a structured way with small groups of colleagues in a safe environment. Participants shared their challenges and experiences, and they came away not only with new ideas and solutions, but also a trusted peer network that they could turn to after the event. Groups are continuing to meet virtually and in person as they implement what they learned.



100%

of survey respondents said they would come back — and recommend the event to others



Participants Say...



“If you want to take your business to the next level, make sure you participate in the NAMA Executive Forum.”

“Loved Mike Walsh’s talk about the future. None of us get the luxury of thinking about the future enough.”

“Just might be the best decision you can make in improving your leadership skills.”



MEMBER ENGAGEMENT

Membership Growth

As NAMA's visibility and offerings grow, NAMA itself continues to grow. The organization ended 2017 with 1,027 members — 4% more than a year earlier. The upward trend can be attributed to enthusiastic joiners — including a number of suppliers new to the industry — an engaging renewal campaign, and a revitalized membership team.



ADVOCACY
Develop **RELATIONSHIPS** with influential lawmakers on **CAPITOL HILL** at NAMA's annual **LEGISLATIVE DAY**.
Gain invaluable **EXPERIENCE** as an advocate for the industry by participating in 20+ state **lobby days**.
Engage in grassroots efforts to **fight legislation** & unfair legislation to **SAVE** the industry **MILLIONS**.
Access the **Grassroots Advocacy App** for just-in-time updates.

INFORMATION
Learn how to **improve your operation** & **connect with peers** through **inTouch**, NAMA's quarterly magazine.
Tap into **industry news, trends & innovations** with NAMA's **WEEKLY DIGEST**.
Make **informed decisions** based on the **LATEST RESEARCH** including the Operating Rate Report.
Consult **KNOWLEDGE SOURCE PARTNERS** to gain **solutions** for your business.

SAVINGS
Receive **DISCOUNTED REGISTRATION FEES** for **The NAMA Show and Coffee, Tea & Water Show**.
Score **DEALS** on **SHIPPING, TRAVEL**, and more.
Purchase **PUBLICATIONS** at a **reduced rate**.

EDUCATION
ELEVATE your business by attending **DEDICATED EDUCATION SEMINARS** at **The NAMA Show and Coffee, Tea & Water Show**.
ADVANCE your career & business with **PROFESSIONAL DEVELOPMENT** including **INDUSTRY Executive Development** programs.
Become an **EXPERT** in your field and **attract new clients** with **Certificate and Certification** programs.

NETWORK
BUILD & STRENGTHEN RELATIONSHIPS with peers and industry leaders at NAMA events including **The NAMA Show and Coffee, Tea & Water Show**.
JOIN member **COMMUNITIES** like the **Emerging Leaders Network** and **Women of the Industry**, where you can engage with peers and share ideas.
Connect with NAMA staff, 20+ **dedicated, knowledgeable professionals** serving you.

QUESTIONS? 888.337.8363 • members@namanow.org • namanow.org
NAMA promotes and protects the advancement of the convenience services industry.

Field Visits

NAMA representatives spent more time in the field in 2017, aiming to better understand members' day-to-day operations and their concerns. They attended a number of industry events, including the Houston and Atlantic Vistar shows, state council meetings, and the MEET (365) and LightSpeed user groups at the NAMA Show.

Members of the NAMA team also visited a number of individual member businesses to discuss their interests and priorities for the association going forward. These visits will continue in 2018 and beyond as NAMA works to strengthen its brand and, most important, better serve members.

A colorful flyer spelling out the benefits of NAMA membership aided in recruitment efforts in 2017.



The developments of 2017 helped build more value for NAMA members, including increased visibility for their businesses, advocacy wins to protect their bottom lines, and exposure to new knowledge and innovation. These benefits will continue through 2018 as NAMA continues to raise the bar for all in the convenience services industry.