

convenience store *n* (1950) **1** : a small store offering a standard array of prepackaged food, drinks, coffee, household items and other necessities; may sell gasoline **2** : a small business, accessibly located, that often stays open late

Redefining Convenience:
Successfully Marketing to 21st Century Consumers

con·ve·nience store
\kən-'vēn-yən(t)s 'stōr\
n

convenience store *n* (2001) 1 : a place that provides necessities and satisfies material wants 2 : offers a complete experience conducive to personal ease and comfort

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This study redefines the **convenience** store from the **consumer's** point of view. It highlights the need to refine, modernize and **update** **convenient shopping** options. It examines ways to improve marketing and merchandising, and provides **insights** and valuable tools to promote this

change

➔ Executive Summary

At no time in recent history has there been a greater opportunity for the convenience store industry. And yet the industry has been slow to capitalize on it – to understand and satisfy consumers' increasing needs for convenient shopping options; to take ownership of "the new definition of convenience"; and to aggressively market its unique strengths and services.

Moving into the 21st century, the industry is in a precarious position. It is in danger of letting the concept of convenience it created and owned be usurped by others.

As consumers' lives have changed over the last decade, and with it their convenience needs, the industry at large has been slow to respond. It has generally assumed that a convenient, 24/7 location and a traditional convenience store merchandise mix are sufficient to keep consumers coming back.

It has been slow to recognize that "convenience" is no longer only about a small, accessible place. It is about a convenient experience, a complete experience that includes efficient service in a pleasant and clean setting, every time,

“The Council felt strongly that in order to create a point of difference for the future we had to understand how the nature of convenience is changing, and what it means to different consumer groups.”

Jim Keyes, President, CEO, 7-Eleven, Inc.

whenever the customer wants it. It means more than a convenience offering; it also means having the best people and the best facilities. One without the others is no longer enough. That is why the convenience store industry today is vulnerable to a wide range of retail formats – traditional and new – that offer consumers convenient ways to buy the same merchandise and services.

In an effort to help the industry retake ownership of convenience, the National Association of Convenience Stores (NACS) and The Coca-Cola Company convened the NACS/Coca-Cola Leadership Council in February 2000. The Council comprises senior executives from 12 member companies reflecting the makeup of the convenience store industry: large and small, private and public, petroleum and nonpetroleum.

The Council's overall objective was to formulate strategies to profitably position the convenience store to compete for today's consumers by redefining convenience from the consumer point of view.

The Council also set four specific goals to achieve this objective:

1. Understand how the definition of convenience is changing, overall and among key consumer groups.
2. Understand the role convenience now plays in consumers' perceptions of value and how it applies to convenience store and petroleum marketing channels.
3. Identify the implications and growth opportunities for convenience store and petroleum marketing channels.
4. Enable convenience stores to recapture ownership of convenience.

The following report provides new learnings and interpretations by analyzing familiar industry data, comparing it to the broader competitive retail environment, and integrating an understanding of consumers' convenience attitudes and expectations.

The recommendations are designed to stimulate thinking for companies small and large, encouraging management to take a broader view of the modern convenience opportunity. These recommendations include pilot test concepts and a toolkit to help companies determine where they fit within the competitive environment.

In all, the Council's goals were to provide insight and tools to help the industry understand the changing nature of convenience from the consumers' perspective and, in doing so, retake ownership of the convenience model.



THE STATE OF CONVENIENCE



For some 50 years, convenience stores have filled an important role in the lives of American consumers. For most of that time, the convenience store model has been at the cutting edge of anticipating and satisfying consumers' convenience needs.

CHANGING LIVES, CHANGING NEEDS

In the 1950s, when World War II veterans and their families moved to the suburbs, commuting and longer working days became a way of life for millions. Convenience stores became a fill-in grocer – the quick place to pick up forgotten milk or bread when other stores were closed.

As the economy boomed in the '60s and '70s and working hours continued to expand, so too did convenience store hours. Gasoline was added to speed up the commute. When women increasingly joined the workforce in the late '70s and '80s, convenience stores extended their merchandise and hours to suit the needs of the two-worker family, offering self-serve coffee and breakfast on the run.



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As consumers' taste levels evolved through the '90s, so too did convenience store offerings – from hot coffee to flavored coffee, from sodas to flavored iced teas. And as busy Americans took to the road in increasing numbers, convenience stores anticipated their needs by adding self-service gas and car washes.

However, by the end of the 1990s, convenience was no longer the exclusive domain of the convenience store. Many retailers and other venues had recognized the opportunities in providing convenient solutions for increasingly fast-paced and time-pressed lifestyles. As a result, by the beginning of the 21st century the convenience store had lost its edge as the primary source of convenience shopping for many Americans.

A DRAMATIC SHIFT

The convenience needs of today's working family (husband, wife, teens) are very different from those of two decades ago. Increasingly busy schedules mean that everything – work, meals, play, family visits, even shopping – must be efficiently planned, with everyone in the family doing his or her share.

As a result, consumers now expect to shop whenever their time allows – day or night.

- Family chores are done during the lunch hour, after work, after dinner, at night.
- Teens, often at home more than adults, are relied on for family errands.
- Airports, train stations and bus stations give commuters convenient opportunities to buy meals, gifts, clothing, even financial services.

- The family weekend outing is frequently a shopping trip to the supercenter or warehouse club, which offers a new way to stock the pantry.
- Shopping as an emotional treat has become increasingly important for consumers, who have little time to get it anywhere else.
- Banking and investing are done at all hours of the day or night, at the ATM or online.
- Many prefer self-service, automated options for paying bills, purchasing tickets, checking a timetable or making reservations.

Similar expectations of convenience are held by the fast-growing older population, especially younger “baby boomers” who grew up in a working family, early retirees (pre-65) and the growing number of older consumers who work part-time.

In fact, the whole notion of convenience has changed dramatically for most Americans. First and foremost, consumers no longer think of convenience solely in terms of a convenient location, extended hours or an easy place to get in and out fast. Today, convenience encompasses much more,¹ including

“Being in-stock of what I want when I want it.”

“Products and services designed just for me.”

“Being able to pay any way I want to – and fast.”

In addition, consumers’ convenience needs often change depending on the circumstances: to or from work, with a child in the car, it’s a treat, it’s a chore.

THE COMPETITION GETS TOUGH

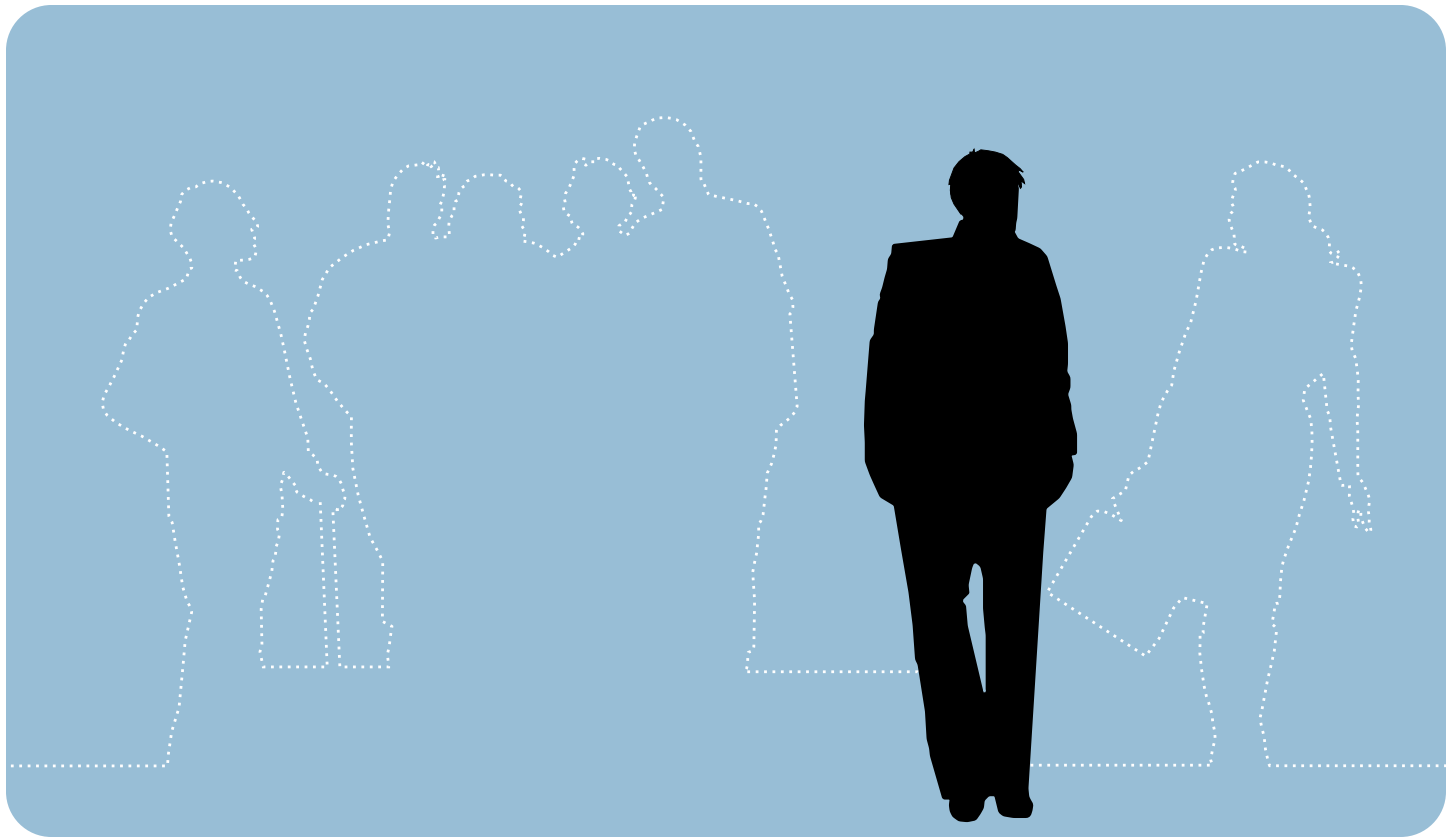
Retailers of all classifications and sizes have seen the opportunity and now offer an ever-expanding range of shopping options to fit the evolving convenience needs of consumers. In addition, technology has exponentially increased the range of convenient options and expectations.

- Many retailers have extended their shopping hours – often 24/7.
- Fast-food restaurants, drugstores and banks offer convenient drive-thru windows.
- A wide variety of retailers offer ready-to-go meals.
- Drugstores provide 1-hour photo and have increased their convenience grocery assortment.
- Giant supercenters, such as Wal*Mart, have added smaller, more convenient shopping options (such as the Wal*Mart Neighborhood Market).

“It is no longer hard to get a good cup of coffee or a snack to go. It is now conveniently available on just about every street corner. That means we as an industry need to think differently about how we market ourselves and our assets, and what we can offer to stay at the leading edge of convenience.”

Dean Durling, Chairman & CEO, Quick Chek Food Stores

- Banks provide 24-hour automated teller machines (ATMs).
- The Internet gives consumers a seemingly infinite selection of information and shopping – books, music, beauty products, pet supplies, travel reservations – all from the convenience of home or office.
- Supermarkets, mass merchandisers and warehouse clubs are moving into petroleum marketing and the convenience store business.
- Even the quick cup of freshly brewed coffee, once a staple of the convenience store, is now available at new levels of excellence from specialty coffee stores to donut shops to ice cream stores.



THE CONVENIENCE STORE CHALLENGE



This study analyzed existing industry research plus U.S. and global retail trends to better understand and interpret the issues facing the U.S. convenience store industry.

“Why is it that in spite of the apparent innovations we have made over the last decade we continue to attract the same audience: younger, working men?”

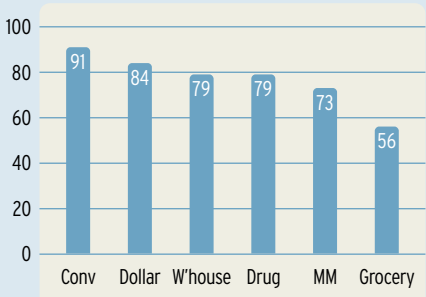
Sonja Hubbard, CEO, E-Z Mart Stores

A NARROW UNIVERSE

Core shoppers shop the gas pump and the store often. Convenience stores continue to successfully attract this core group of loyal customers. They are the same customers that convenience stores have attracted for decades – predominantly younger, lower-income males and smokers. Convenience stores are atypically dependent on these “heavy shoppers,” significantly more than other retail channels.² Heavy shoppers are defined as those who shop three or more times monthly and spend an average of \$8.67 per trip. In fact, one-third (33%) of heavy shoppers generate 91% of total convenience store sales.

CONVENIENCE STORE CUSTOMERS ^{3,4}	HEAVY SHOPPERS	LIGHT SHOPPERS	ALL SHOPPERS
Sales Volume	91%	8%	100%
Male	60%	40%	52%
Female	40%	60%	48%
Smokers	47%	14%	27%
Mean Age	39.6	50.1	45.4
Mean Annual Household Income (in thousands)	\$44.5	\$54.8	\$49.5

RETAIL SHOPPERS
Percent of Dollar Sales by Heavy Shoppers (top 33%)



Lower-margin items make up the majority of sales. Not surprisingly, because of the narrow customer focus, most sales still come from gasoline, tobacco, beer/wine/liquor and packaged beverages, all lower-margin categories.⁵ In fact, lower-margin tobacco now dominates in-store sales: 36% of the mix in 1999, an increase of 8% since 1998.⁶

Fast gas has been an important innovation for the industry. More than 70% of convenience stores now offer gasoline,⁷ and it makes up 53% of their sales volume.⁸ However, this business is at risk because fewer consumers are buying gas at convenience stores: 69% in 1999, down from 79% in 1998.⁹ Supermarkets, mass merchandisers and warehouse clubs are successfully adding gasoline to drive sales.

Foodservice still represents only 14% of the industry merchandise mix, in spite of an increased focus on higher-margin foodservice by both gas and nongas convenience store retailers.¹⁰ It's not that consumers don't want fresh food to eat on the run or take home. It's that they don't identify convenience stores with fresh, sanitary, nutritious food.¹¹

"Its freshness is pretty questionable."

"Packaged products are often past their expiration date."

"They don't have the turnover to have the food fresh."

"Some convenience stores just aren't clean."

Store managers recognize the opportunity¹² – but also the issues:

"Food-to-go that's easy to eat while driving is a big draw...but you have to have separate help if you want the category to grow."

And the competition is increasing. Many other retailers now conveniently offer fresh food-to-go, including traditional fast-food retailers with drive-thru windows, the local supermarket, the supercenter – even corporate cafeterias.

Implications

- Because of their degree of dependence on core male shoppers, convenience stores must continue to understand and satisfy their needs. They cannot afford to lose these customers.
- To develop a more profitable mix, however, a broader range of consumers must view the convenience store as a credible destination.

NO WELCOME SIGN HERE

In spite of the dominance of male shoppers, numerous other consumer segments currently shop the convenience store – or need to but don't feel encouraged to do so.

Teens already have the convenience store habit, but they are discouraged from shopping there – male teens in particular.

“The help are mean to you...if you're a kid they assume you're going to steal... and they try to cheat you.... It really makes me angry.”

This is a vital market segment because teens shop convenience stores more than adults do (74% shop weekly vs. 68%¹³) and spend more than adults do.¹⁴ They shop both for themselves and for the family.

The purchase index for teens is significantly higher across most of the convenience store categories, including foodservice and other high-margin categories.

TEEN PURCHASE INDEX¹⁵ (Average: 100)

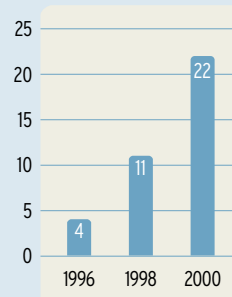
Frozen Food	250	Ice Cream	160
Fountain Drinks	174	Salty Snacks	157
Grocery	173	Cakes/Cookies	128
Foodservice	169	Magazines/Newspapers	125
Candy/Gum	161		

Working women/mothers increasingly need convenient shopping options, but they have found places other than the convenience store that meet their criteria for a convenient shopping experience:

“Easy to shop, good prices, good parking, clean and safe.”

Drugstores, with their expanded selection of grocery items and household products, have in fact become the convenience store for many American women, nearly one-quarter of whom shop there weekly.¹⁶

FEMALE DRUGSTORE SHOPPERS
Percent of Women 18-70 Shopping Weekly



While women do shop at convenience stores, the categories of greatest interest to them have the lowest profile in the stores, and those of least interest to them have the highest profile.

FEMALE PURCHASE INDEX¹⁷ (Average: 100)

Low Interest		High Interest	
Beer	56	Health/Beauty	250
Magazines	82	Fresh Produce	150
Cigarettes	95	Frozen Food	150
		Bread	145
		Grocery	125
		Milk	120

Consumers 55 and older buy gas at convenience stores at the same rate as younger consumers, but they buy significantly less in the store. The only categories they buy at the same incidence as other adult shoppers are milk, lottery tickets and bread.

55+ PURCHASE INDEX¹⁸ (Average: 100)

Fountain Drinks	54	Beer	67
Ice Cream	65	Magazines/Newspapers	75
Candy/Gum	66	Hot Beverages	76
Salty Snacks	66	Foodservice	79

These consumers are deterred by the kids and the workers – and by the prices if they are retired and over 65.

“They want you in and out fast...sometimes you feel like you’re getting the bum’s rush.”

It is important to note that consumers 50 and older are the fastest-growing and most affluent consumer segment in the U.S. They represent 38% of the adult population, 55% of the disposable income and 80% of all assets.¹⁹ The industry cannot afford to ignore them.

Implications

- The convenience store continues to attract and satisfy its traditional customer base, typically men who buy beverages, cigarettes and gasoline.
- Consumers of all lifestages and lifestyles need convenient shopping options. However, the convenience store model, as it exists today, does not welcome or encourage a broad range of consumers to shop for more.
- The challenge is to determine which consumer segments are the most appropriate for convenience stores to attract, and what it will take to attract them profitably without undermining the core business strengths.

SEEN ONE, SEEN THEM ALL

In today's highly competitive "convenient" retail environment, convenience stores are at risk because the majority undermarket their offerings, and many lack a unique identity. Consumers across all age segments and geographic regions have a generic view of most convenience stores. They are "the convenience store" or "the gas station."

"They all carry the same basic merchandise in the same store."

"They're all pretty much the same."

"It's not the store that's different. It's the manager."

"Slurpee® drinks are not just at 7-Eleven stores. Everyone has a Slurpee."

As a result, there is little loyalty to a particular company or brand. Consumer loyalty is driven more by the location or the manager.

"The generic message is frightening."

Doug Deweese, Vice President-Sales, Super Stop, Inc.

Store managers agree. One of the greatest concerns expressed was the lack of distinguishing marketing support.

"We don't market our existing services."

"Price competition requires marketing attention if we're to protect the business."

Other retailers are aggressively branding to distinguish themselves and to build customer loyalty. For example:

- Wal*Mart – "Always Low Prices. Always."
- Starbucks – the luxury of a good cup of coffee
- Target – "Expect more. Pay less."

As one of the store managers so aptly put it:

"That's why Costco and HEB can sell gas – consumers assume it is cheaper at Costco and better quality at HEB."

Implications

- Convenience stores are increasingly vulnerable because many do not market the products and services they have. As a result, competitive retailers can more easily steal business.
- The convenience store industry must learn from successful retailers who have distinguished themselves with aggressive and unique branding.

OF QUESTIONABLE VALUE

While today's time-pressed consumers are willing to pay a premium for convenience, many have begun to question whether the convenience store offering is worth the premium. This is less of an issue for core shoppers. However, it does prevent infrequent shoppers from shopping more.

"Often the merchandise isn't priced. I think they make the prices up at the register."

"The stores aren't very clean, the people aren't very pleasant and the prices are high.

Makes you wonder whether it's worth it."

Store managers are particularly concerned about increasing price competition for their core categories. Most recognize that unless they can compete effectively on lead items, they will not continue to attract core customers, let alone new ones.

"This increasing price competition really requires marketing attention – especially for cigarettes, beer and gas."

Implications

- Consumers will pay more for convenience, but only if it is delivered on all levels and only if consumers recognize it's worth it.
- Convenience stores must consistently market their value to the consumer (the store is clean, it's easy to shop, the merchandise is priced, loyalty is rewarded, etc.).

NO ROOM TO SHOP

Even if consumers are interested in buying more, convenience stores present basic barriers to doing so. Without carts or shopping baskets, there is only so much consumers can carry.

"Wal*Mart I automatically take a cart. 7-Eleven I don't even need a bag."

"Did you ever see a shopping cart in a convenience store or even one of those baskets?"

In addition, the physical layout of the store limits customers' purchases and slows down the checkout process. Counters at the register are often too crowded for more than one customer to put down a few items. There is no room for the next customer to put down purchases and prepare to pay for them. As a result, it slows the checkout process.

Implication

- Convenience is not about making the store bigger but making the total shopping experience easier and more convenient – in all areas of the store.

SMALL STEPS ARE NOT ENOUGH

In this fast-changing retail environment, the success stories of the last decade have come from companies that have made strategic leaps, evolving and expanding their concept beyond their traditional base.

- Barnes & Noble: from bookstore to social scene
- Citicorp: from bank to electronic financial institution
- Wal*Mart: from mass merchandiser to supercenter to neighborhood market
- Walgreens: from drugstore to convenience store
- Victoria's Secret: from tawdry lingerie catalogue to sexy, all-American fantasy

Meanwhile, the convenience store industry has been slow to adapt and respond. Many companies have neither recognized nor addressed consumers' changing convenience needs. For others, change has been incremental at best. U.S. convenience stores, once the initiators of convenience trends, have borrowed innovations from other industries, e.g., flavored coffee, fast gas, 1-hour photo, ATMs.

Much of the industry's growth is situational rather than proactive, i.e., being in the right place at the right time. For example, the increasing cost of cigarettes meant that many smokers could no longer afford a carton, so they began to buy one or two packs at a time at the convenience store.

To its credit, the industry quickly took advantage of this opportunity. However, depending on such opportunities to drive sales puts companies in a defensive rather than an offensive position.

"I worry that our current approach to checkout payment isn't already being seen as less convenient versus the self-service swiping credit cards and self-checkout in supermarkets."

Stan Sheetz, President, CEO, Sheetz, Inc.

Convenience stores did take a big leap in adding "fast gas." But they limited its impact by doing little marketing at the pump to encourage additional traffic and purchase opportunities. On top of this, the speed at which customers can pay at the pump makes the process of paying for items inside the store seem slow and inconvenient.

Implications

- The industry undermarkets the assets it has, and has let other retailers – often less convenient retailers – take ownership of the convenience proposition.
- Competitive retailers have developed a more intimate and accurate knowledge of consumers' convenience needs and expectations, and have responded accordingly.

“We’re our own worst enemy. We’re failing to deliver, even on the basics. We need to get back to our roots and ensure we satisfy convenience for the customer every single time.”

Chris Havens, Executive Vice President, Ultramar Diamond Shamrock Corp.

CONCLUSION: “HOUSTON, WE HAVE A PROBLEM”

U.S. consumers still view the convenience store as filling an important need: It’s accessible, compact, efficient and simple.

“I use it on autopilot...boom, boom...I’ve got it, I’m out.”

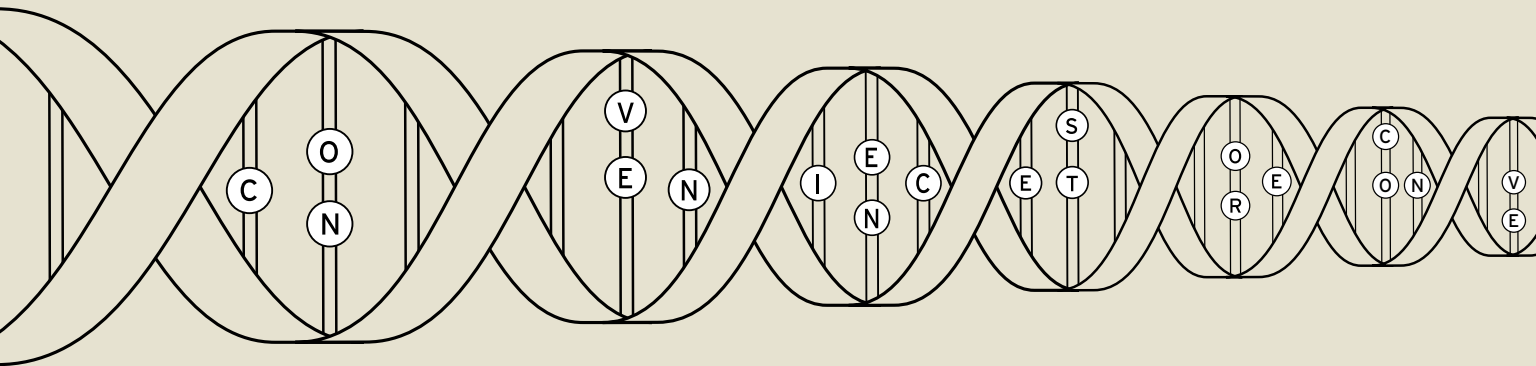
However, many convenience stores do not provide convenience in all areas of the business – from the pump to the checkout. Nor do they do enough to market the services they have.

As consumers’ lives become increasingly busy, the need for convenient ways to shop continues to increase. What convenience means today has evolved way beyond coffee and cigarettes. Yet the convenience industry, in large part, continues to view what’s convenient to consumers in outdated terms.

“Convenience is convenience. It’s still the same concept. Only the things that need to be convenient to consumers are different. Consumers’ expectations are higher.”

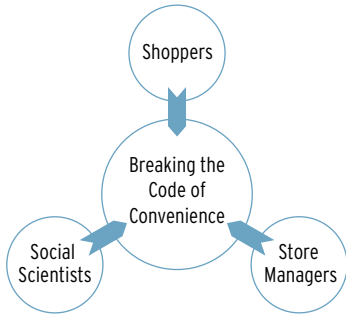
Paco Underhill, Managing Director, Envirosell

As a result, many convenience stores continue to attract a limited group of loyal consumers with relatively low expectations who buy products they can increasingly buy elsewhere at lower prices.



BREAKING THE CODE OF CONVENIENCE

➔ Research was conducted with consumers and store managers to understand what convenience means to consumers today when they shop, and the opportunities and barriers to encouraging different segments of consumers to shop the convenience store more often. Integrated into this research was a perspective on convenience from leading social scientists.



THE SHOPPERS' PERSPECTIVE

Twelve focus groups were conducted with frequent and infrequent convenience store shoppers across the U.S. (New Jersey, Kentucky, California) who represented different lifestages and lifestyles: men and women 21-49 years of age; teens 14-17; working mothers 30-50; generation Xers 21-35; and seniors 55-70.

Interestingly, there is tremendous consistency in the way consumers perceive or shop the convenience store, regardless of demographic segment or area of the country. Overall, the concept of the convenience store is firmly entrenched and valued by consumers: It's accessible, compact, efficient and simple. The only difference is that frequent shoppers are more forgiving when it comes to prices; they acknowledge that "having it now" justifies higher prices. Infrequent shoppers, however, feel guilty as they know they can get it cheaper elsewhere – and often do.

One or two items, fast is how the majority of consumers use the convenience store.

"When I go to the convenience store I'm on a mission."

"It's an emergency...milk...condoms...cigarettes."

"A treat for the kids."

"I'm on the road. It's for gas, a quick drink, a snack."

Consumers perceive other outlets, such as mass merchandisers or malls, as equally convenient when they need more than one or two items – plus the prices are significantly better. Drugstores are increasingly convenient for milk and other basic grocery items. For many consumers, especially infrequent convenience store shoppers, their choice depends very much on their specific needs at that moment – number of items needed, who's in the car, etc.

Low expectations overall characterize the convenience store – with all shoppers, but especially with infrequent shoppers. Selection is limited, stores are not always clean, merchandise is not always fresh and service is "matter-of-fact" at best. And the prices are high – especially compared to the everyday low prices of mass merchandisers and sale prices at supermarkets and drugstores.

"They can't even leave the register to help you find something."

"They won't speak English even though they can."

"There are no niceties."

"You don't want to buy things you don't need...the prices are too high."

Lack of brand identity is a continuing problem. Many consumers view the convenience store as almost generic. They refer to it not by name but rather as "the gas station" or "the convenience store." The perception is that most stores carry the same merchandise in the same basic format. This is not surprising since marketing, for the most part, focuses on brands carried (Coca-Cola®, Krispy Kreme®, Budweiser®) rather than the store itself; and these same brands are carried in many other outlets.

THE STORE MANAGERS' PERSPECTIVE

Telephone interviews were conducted with 20 store managers representing Council member companies across the U.S. The majority felt strongly that existing services are often undermarketed, which puts their stores at risk in the highly competitive – and convenient – retail environment. However, they also saw growth opportunity in several specific areas.

Managers overall noted that, to grow their businesses, it was important to recognize they must compete with the increasing number of outlets that are often as convenient and offer better prices.

“We need to keep our regulars very satisfied, but we also need to offer incentives to new customers so they think of us for convenience, instead of going somewhere else.”

More marketing was perceived as a need. Loyalty programs, promotions/sales and reward programs were viewed as very viable methods of driving sales, but they require consistent marketing support. Increased price competition in core categories such as cigarettes, beer/wine and gas also requires marketing to protect sales.

“Specials tied to gas purchases, like car wash, encourage return visits, but you have to tell people about it.”

“A sales decline in cigarettes or beer/wine, even health and beauty aids, is because our prices aren't competitive.”

“We need to do more up-selling.”

In addition, they considered corporate marketing particularly important to attract infrequent shoppers.

“Companywide offers are important to attract transients.”

Targeted services and products present growth opportunities. Many managers saw opportunities in customer-friendly centers that are promoted to local customer groups. They gave specific examples:

- For workers on the run, college students, truckers: a business center with fax, e-mail, copy machine
- For truckers: showers, e-mail, truck wash
- For office workers: greeting cards and gifts
- Tickets to local events and for travel

“There's an opportunity to attract more of those who spend most – that varies by location.”

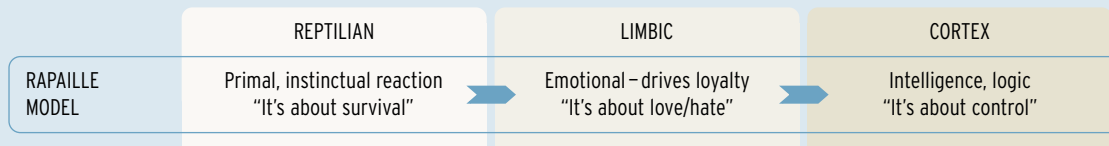
Specialized foodservice, or ready-to-eat food, was also viewed as a big draw. However, managers noted that success requires service support and a separate designated area.

“It's an opportunity, but we have to support it like we do coffee.”

THE SOCIAL SCIENTISTS' PERSPECTIVE

WSL Strategic Retail also identified areas of convenience most important to today's consumers using the psychological model created by psychologist/sociologist Dr. Clotilde Rapaille, Archetype Discoveries,²⁰ and insight from retail anthropologist Paco Underhill, Envirosell.

According to the Rapaille Model of Behavioral Response, the brain responds sequentially to messages in three centers.

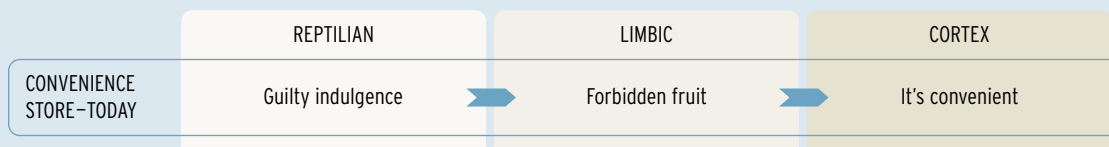


To attract and keep customers, businesses must satisfy consumer desires on each of these three levels. The most successful companies do just that. However, most convenience stores focus on creating a single logical rationale for consumers, e.g., it's convenient. This leaves plenty of opportunity for smart competitors to create a more meaningful and multilayered emotional alternative.

"This is a unique and revealing way to look at our business. It encourages all of us to think differently about how to bring real value to customers by satisfying them on multiple levels."

Teri Richman, Senior Vice President, Research & Industry Affairs, National Association of Convenience Stores

According to Underhill, the convenience store at its most "primal"/reptilian is about fast indulgences – beer, junk food, cigarettes and gas. That is why it continues to satisfy the very specific needs of younger, working males – and teenagers. And why it does not welcome females and older consumers.



"The convenience store was – and still is – about the forbidden fruit...sex, drugs and rock & roll."

Paco Underhill, Managing Director, Envirosell

The following chart uses the Rapaille Model to compare convenience stores to other retailers – Wal*Mart, The Home Depot and Starbucks – that successfully satisfy consumers on all three levels. As a result, these retailers continually attract and satisfy an ever-expanding customer base.

	REPTILIAN	LIMBIC	CORTEX
CONVENIENCE STORE – TODAY	Guilty indulgence	Forbidden fruit	It's convenient
WAL*MART	Abundance	Look at all this good stuff	I can afford it
STARBUCKS	Sustenance	The affordable luxury of a stolen moment	It's good quality
HOME DEPOT	Home and hearth	Even I can do it	I can do anything

Implications

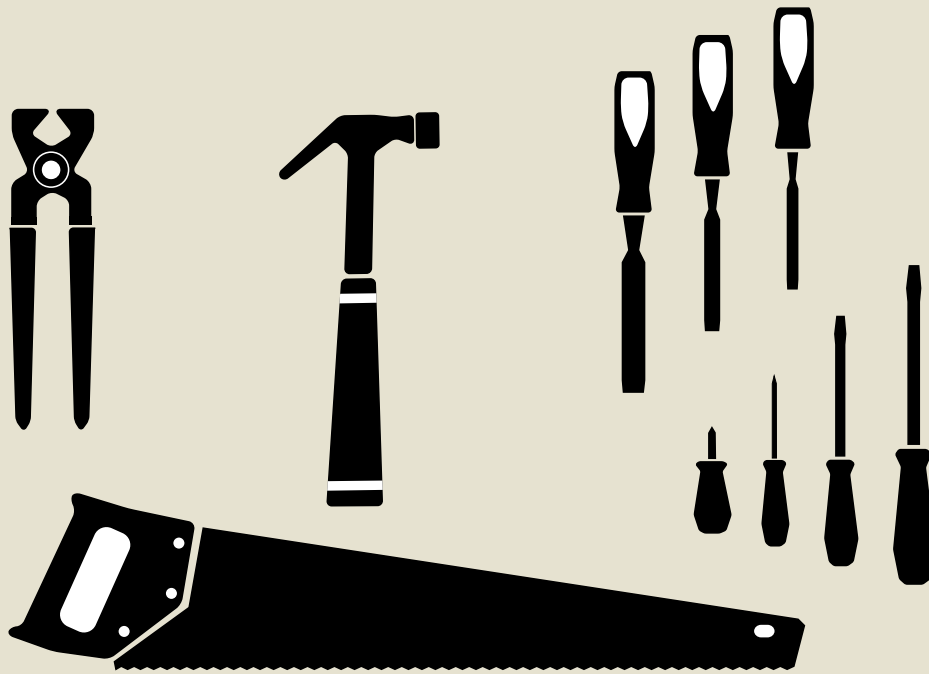
- One of the reasons convenience stores have struggled to get “heavy shoppers” to buy more is that most of the new product categories and services now offered (e.g., healthy food and drinks) do not support “guilty indulgences/forbidden fruit.”
- The same rationale explains the failure of convenience stores to attract women and older consumers; they are in fact alienated by the “guilty indulgences.”
- The challenge for the industry is to develop a unique position that will continue to attract core shoppers – younger, working men who smoke – while at the same time encouraging infrequent shoppers to buy more.

CONCLUSION: DEMANDING MORE

Consumers, convenience store managers and social scientists have clearly defined the changing role and opportunities for convenience stores. For the most part, however, senior management has yet to recognize this change. Industry initiatives generally focus on providing a single-dimension convenience offering. Research shows that consumers now demand more.

“Our consultants recommended an innovative approach to help us understand what consumers really mean by convenience today. It included integrating learnings from our own store managers with those of a variety of consumer segments – our core customers, working moms, teens and retirees – plus insight from leading social scientists, including the Envirosell group.”

Richard Wood, President, CEO, Wawa, Inc.



A NEW MODEL FOR DELIVERING CONVENIENCE



The convenience store was always about helping consumers manage their busy lives – in essence, surviving in a hectic world. However, as other retailers caught up and the notion of convenience evolved, the convenience store lost its distinctive edge.

The opportunity ahead is to recapture this distinctive edge by refocusing on core values, and by creating a unique position and contemporary voice that address the evolving convenience needs of today's consumers – a position that cannot be readily copied by existing or new competitors.

A NEW STRATEGIC VISION

The distinctive position presented here is based on a strategic vision: **to make the inconvenient convenient for today's consumers by satisfying their individual needs – practical and emotional – so they can manage their time-pressed lives.** This new convenience model and business strategy, based on research findings, will enable the industry to redefine convenience to make it relevant, effective and practical.

“Making the inconvenient convenient suggests an evolutionary process, something that will allow us to build on our core customer base.”

Jeff Miller, President, Miller Oil Company

The model is positioned to:

- build on the inherent strengths of the format/concept
- continue to satisfy core customers
- be relevant to contemporary convenience needs
- create a logical rationale for infrequent shoppers to shop more often

This new model for convenience refocuses on, and evolves from, the original convenience store concept.

	REPTILIAN	LIMBIC	CORTEX
CONVENIENCE STORE-TODAY	Guilty indulgence	Forbidden fruit	It's convenient
CONVENIENCE STORE-TOMORROW	Survival	I'm overwhelmed. Save me. Be my haven	It makes my life easier

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In essence, the model follows a simple problem/solution format. The consumer has a problem: “I am overwhelmed. I am drowning. Help me survive.” The solution is the convenience store: “A haven that makes my life easier.”

The following business strategy will help companies large and small think through, evaluate and execute the new model in a way that best addresses their financial and competitive situation. It has four components.

MARKETING STRATEGIES

Overall, the strategies must preserve and enhance what convenience stores effectively stand for:

Accessible – location

Compact – easy to navigate

Efficient – fast in and out

Simple – little thinking required

Maintain the current heavy shopper segments (men and teens) by continuing to emphasize the convenience store as their “haven.”

“As we take the leaps, we need to be sure that we don’t lose the current core customers to new competition that’s trying harder.”

Dick Riley, President, East Coast Oil Corp.

Expand the customer base. Attract working mothers, older consumers (working and retired), truckers, students, etc., by presenting time-saving solutions in a pleasant, conducive atmosphere. Select one or two segments of consumers that offer the greatest potential in specific markets.

Stand out by satisfying “inconveniences” in a unique way. This could be accomplished by creating alliances with traditional vendors and/or outside resources to help execute elements of the strategy.

Communicate with vendors and store personnel regularly. Make sure they understand the strategy and their role in it.

MERCHANDISE STRATEGIES

Several proposed strategies will maintain core customers and attract new ones.

Sell by day-part – that is, customize merchandise, merchandising and marketing support by convenient day-part. This will eliminate the current one-size-fits-all approach that limits the customer base. Specials can be tailored to specific customers at specific times.

- Drive-time specials: Workers
- 9-11 a.m.: Retirees
- After school: Teens
- Evening: Family needs
- Weekends/holidays: Road trips/outings/leisure

Select one or two options that offer the best financial potential. Take into account that day-part merchandising requires day-part cleanup.

Reinforce convenient food, not convenience store food. Above all, food sales require a clean store and fresh merchandise. Convenience stores can also reinvent the single-serve, self-serve solution.

Innovate by going beyond food into innovative, timesaving products and services. Consider introducing self-service technology, customized to the marketplace. Define their space in the store. Then promote their availability.

Possibilities include:

- Business center: fax, copier, e-mail, stamps, phone cards
- Travel center: bus/train/plane tickets, commuter passes, maps
- Gift center: gift certificates from alliance partners
- Entertainment center: tickets for concerts, movies, sports events, children’s events

Use technology for efficient, unique self-service. Scanning for payment in the store and at the pump speeds up service. Computer terminals, Internet access and automatic dispensing increase convenience for consumers.

Maximize employee effectiveness by using workers where they have the most impact: keeping a clean, safe, friendly store; ensuring merchandise is presented/marketed in a timely fashion; and offering trained assistance in the service centers.

VALUE STRATEGIES

Justify the premium. If the strategies are executed and marketed well, the value of the convenience store as “savior” is priceless: “Save me. Save my day.”

Offer unique technology-driven services to enhance value. Services valued by consumers include speed, sanitary delivery and customization.

Use day-part merchandising with entry price-points to attract new customers and reward established customers.

BRANDING STRATEGIES

Brand, brand, brand. Tell the brand story to develop fierce loyalty among shoppers, both core and new, and to drive the emotional distinctiveness of the message. This also enhances the overall value proposition.

“We need to get people emotionally tied to what we are doing. It doesn’t matter whether we are a big company or a small one.”

Scott McManus, Owner, SnappySack Corp.

Advertise by thinking globally and acting locally. Advertise to create a unique chainwide brand identity, and execute locally to address the local community’s needs or wants.

Adapt the execution to the lifestage or lifestyle of the community, whether that is workers, young families, students, truckers, retirees or tourists.

Market efficiently, consistently, everywhere: at the pump, in the store, on the air. Marketing vehicles include liquid crystal signs, posters, pump signs, radio and billboards.

“What do you stand for – and will always stand for every day? How do you display it flawlessly every day?”

Robert Stein, President, CEO, Dairy Mart Convenience Stores, Inc.

CONCLUSION: EVOLVE A NEW MODEL

This new model is an evolution of the core values of the convenience store:

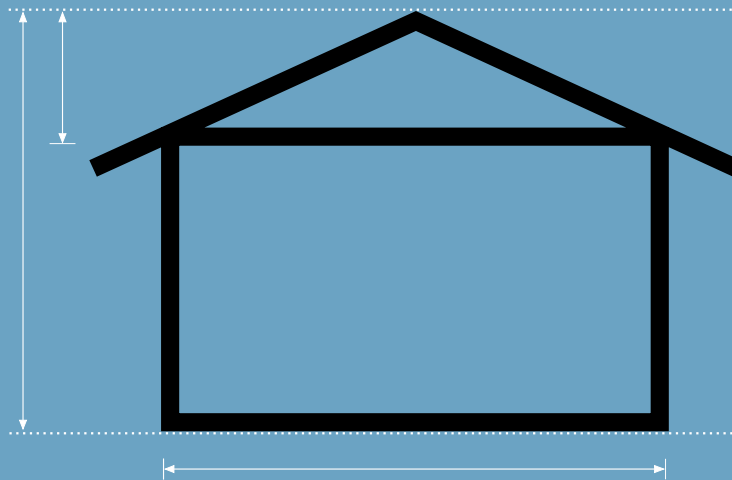
- It is logical and believable because it builds on the inherent qualities the format has always offered.
- It addresses contemporary convenience issues in a contemporary voice.
- It is unique to convenience stores – even as they exist today.
- It is a position that can welcome both loyal and new customers.
- It can adapt to different consumer segments as market opportunities arise.

In all, it becomes a benchmark against which all aspects of business can be measured.

THE CONVENIENCE STORE BLUEPRINT



The challenge is how to effectively and profitably execute the new position and strategy by customizing it to the individual needs of companies, their markets and their consumers.

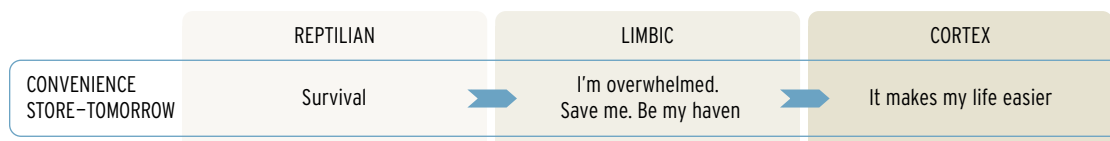


This conceptual blueprint will help companies develop a profitable, unique position. It will help:

- evaluate marketplace position compared to industry benchmarks
- identify opportunistic customer segments
- select pilot concepts for in-market testing
- evaluate the results for rollout

PILOT TEST CONCEPTS: AN OVERVIEW

The three pilot concepts presented below are based on the new strategic vision – to make the inconvenient convenient for today's consumers – and on the Rapaille Model applied to the convenience store.



The test concepts were created and refined based on input and evaluation from consumer focus groups and store managers. They rated highly as appealing to core and/or new consumer segments. Each includes a description of what the concept is designed to achieve and the elements that must be defined to fully develop the concept. Each pilot's strategy map presents examples of marketing, merchandise and value strategies, along with the Emotional Quotient,²¹ i.e., the emotional payoff.

PILOT 1: DAY-PART MERCHANDISING/MARKETING

Description

- Brings new/infrequent shoppers to the store by attracting them at specific times that meet their needs, while at the same time rewarding core customers for their business.
- Creates exclusive day-parts, merchandising products to customers when they need them most.
- Drives traffic throughout the day.

Elements

- Identify the key lifestage/lifestyle segments of customers, heavy/core and light. Select one or two that appear most realistic and profitable for the competitive situation.
- Determine the key time periods that suit the needs of each segment.
- Select the product/service offering that meets the needs of these shoppers during these periods.
- Determine the overall price/value strategy that would attract them.

Strategy Map

	WORKERS	MOMS	TEENS	RETIREES	STUDENTS
MARKETING STRATEGY	Drive time AM/PM	8-9 PM	After school	9-11 AM	9-11 PM
MERCHANDISE STRATEGY	Meals on the road	Groceries, lunch snacks	Soda, candy, salty snack	Coffee, roll, newspaper	Soda, groceries
PRICE/VALUE STRATEGY	Bonus coffee	Free chips with grocery purchase	Candy bar Tuesday	Free paper on Friday	Free pretzels with soda
EMOTIONAL QUOTIENT	Good start/end to the day	Family	Welcome	Friendly recognition	A reward

Keys to Success

- Ensure message and merchandise change for each day-part.
- Work with vendors to provide unique means of executing and packaging offerings.
- Market – at the pump, in the store and in affordable media (e.g., radio).

PILOT 2: SERVICES AT YOUR SERVICE

Description

- Provides timely products and services – that is, takes products or services that are generally viewed as inconvenient and makes them readily accessible.
- Customizes the program to attract key consumer segments.
- Uses available technology and outside service to make the program efficient and operational with minimum personnel support.
- Leverages technology to enhance the overall value proposition for retailer and consumer.

Elements

- Select a service that would most satisfy the needs of core and target consumers.
- Identify services that are not satisfied by competition.
- Choose an outside service provider or alliance to facilitate and manage the offering.
 - Business center: fax, copier, e-mail, stamps, phone cards
 - Travel center: bus/train/plane tickets, commuter passes, maps
 - Gift center: gift certificates from alliance partners
 - Entertainment center: tickets for concerts, movies, sports events, children's events
 - Community service center: golf/tennis reservations, charity events, information on local activities

Strategy Map

	WORKERS	MOMS	RETIREES	STUDENTS
MARKETING/ MERCHANDISE STRATEGIES				
BUSINESS CENTER	Send a fax	Copies for the PTA	Copy medical forms	Receive a fax
TRAVEL CENTER	Buy commuter ticket	Schedule a school trip	Get senior discount	Buy tickets to go home
GIFT CENTER	Secretary's Day	Birthday party	Thank a neighbor	Make an impression
COMMUNITY SERVICE CENTER	Advertise at an event	Activities for children	Find local services	Find things to do
PRICE/VALUE STRATEGY	Service fee	Service fee and free postings	Service fee and free postings	Service fee and free postings
EMOTIONAL QUOTIENT	Saved my day	Help me do it all	It's easy to stay involved	PM emergencies

Keys to Success

- Develop alliance with provider of services and equipment to implement successfully.
- Make sure equipment works at all times.
- Market on the total site: at the pump, in the store and in affordable media (e.g., college radio, local businesses).

PILOT 3: FRESH EXPRESS

Description

- Takes advantage of consumers' growing need for fast, easy food to eat on the run.
- Builds on the convenience store's core equity of fast beverages and snacks.
- Addresses a growing interest in fresh, healthier food, especially by infrequent shoppers (working women, moms, retirees).
- Utilizes cobranding to build credibility.
- Leverages new delivery systems to build "clean, fresh" credibility.

Elements

- Keep the store clean. Without a clean store at all times you cannot sell food – any food. Don't add foodservice to a substandard operation.
- Build on the successful coffee model: It's fresh, it's hot, it's flavored, it smells great, there's a coffee hostess, etc.
- Identify the fresh food mix and brands that are most appealing to core and potential customer segments.
- Partner with major brands/vendors to build credibility.
- Utilize self-service delivery systems/vending machines to ensure clean, fresh, single-serve food.
- Create a training program for the staff.

Strategy Map

	WORKERS	MOMS	TEENS	RETIREES	STUDENTS
MARKETING STRATEGY	3 meals a day	Dinners	Breakfast/lunch	3 meals a day	Late-night meals
MERCHANDISE STRATEGY	Gourmet-quality deli	Packaged for a family – 2, 4, 6	Walk-and-eat food	Light fare	Midnight food
PRICE/VALUE STRATEGY	Premium	Affordable for a family	Affordable food	Smaller portions available	Midnight specials
EMOTIONAL QUOTIENT	Take the boredom out of takeout	No-guilt meals	I'm starving. Fill me up	Suits me. Suits my diet	Permission to eat late

Keys to Success

- Cleanliness, cleanliness, cleanliness.
- Train the staff.
- Select highly recognized brand names.

BLUEPRINTING TOOLS

This set of five tools enables companies to determine which customer segments represent the most opportunity and which of the pilot concepts is most appropriate for testing in specific markets.

“These tools will enable individual companies to determine where they fit into the national picture and then which test concepts might be most competitive in their markets.”

Woody Woodroof, President, CEO, Spectrum Stores, Inc.

If all stores in the company have a similar profile, complete the five tools for the entire chain. If company stores have different formats and markets, complete one set of tools for each. Outlets with gas should complete tools 1 through 5 twice, one including gas and one excluding gas in the mix.

Companies without the data necessary to complete some or all of the tools should consider conducting specific research to obtain it. For example, to determine the mix of heavy vs. light shoppers, one method is to conduct quantitative intercept interviews with shoppers as they leave the store to determine their shopping habits. Conduct these interviews at a sample of stores that reflect the market mix, and at key shopping times to ensure a representative number of both frequent and infrequent shoppers. Compare the data to the “Heavy-Light” criteria (tool 1) to determine customer profiles (tools 1 and 2). The same research could capture the information needed for tool 3.

Data from the five tools provide information on:

- store customers, both frequent and infrequent (either companywide or by format or market)
- lifestage and lifestyle segments best/least represented
- merchandise bought/not bought in the store

Comparing these data to the industry data reveals:

- which areas (consumer segments and merchandise categories) are overdeveloped or underdeveloped
- which areas provide the most profitable opportunity
- the competitors for that business, and how difficult it would be to capture a greater share of that category or consumer segment

Compiling this information helps determine which pilot concept(s) to test in which markets, and within the concept which consumer segments present the greatest opportunity. When selecting a concept, it is critical to evaluate the financial implications. Develop a pro-forma P&L to determine if the breakeven is reasonable.

“It is critical that we evaluate how to make it profitable. We need to evaluate the cost benefit side...to test it against a business model.”

Robert Lavinia, President, CEO, Tosco Marketing Co.

Tool 1. Customer profile, heavy/light mix (in-store only)

	SHOPPERS–Industry	DOLLAR SALES–Industry	SHOPPERS	DOLLAR SALES
HEAVY SHOPPERS*	33%	91%		
LIGHT/MEDIUM SHOPPERS**	67%	8%		

* Three or more trips/month, spend an average of \$8.67/trip.

** Less than three trips/month, spend an average of less than \$4/trip.

Source: Consumer Purchase Indicators: Cross Channel Trends, AC Nielsen Homescan,™ July 2000.

Tool 2. Customer profile, heavy shoppers

	HEAVY SHOPPERS–Industry	HEAVY SHOPPERS
SALES VOLUME	91%	
MALE	60%	
FEMALE	40%	
SMOKERS	47%	
MEAN AGE	39.6	

Source: Consumer Purchase Indicators: Cross Channel Trends, AC Nielsen Homescan, July 2000.

Tool 3. "Who is your customer?" Customer profile, lifestyle/lifestage segments

	AVERAGE WEEKLY ESTIMATED PERCENTAGE OF TOTAL
WORKING MEN	
WORKING WOMEN	
MOTHERS	
TEENS 13-19	
STUDENTS	
RETIREEES	
TOURISTS/ TRAVELERS	
OTHER (SPECIFY)	

Tool 4. Merchandise sales and profit mix

	SALES-Industry	MARGIN-Industry	SALES	MARGIN
TOBACCO	36%	17%		
FOODSERVICE	14%	50%		
BEER/WINE/ LIQUOR	12%	21%		
PACKAGED BEVERAGES	11%	32%		
CANDY/GUM	5%	40%		
SALTY SNACKS	3%	35%		
MILK PRODUCTS	3%	26%		
BREADS/CAKE	3%	27%		
PUBLICATIONS	3%	18%		
GROCERY	1%	36%		

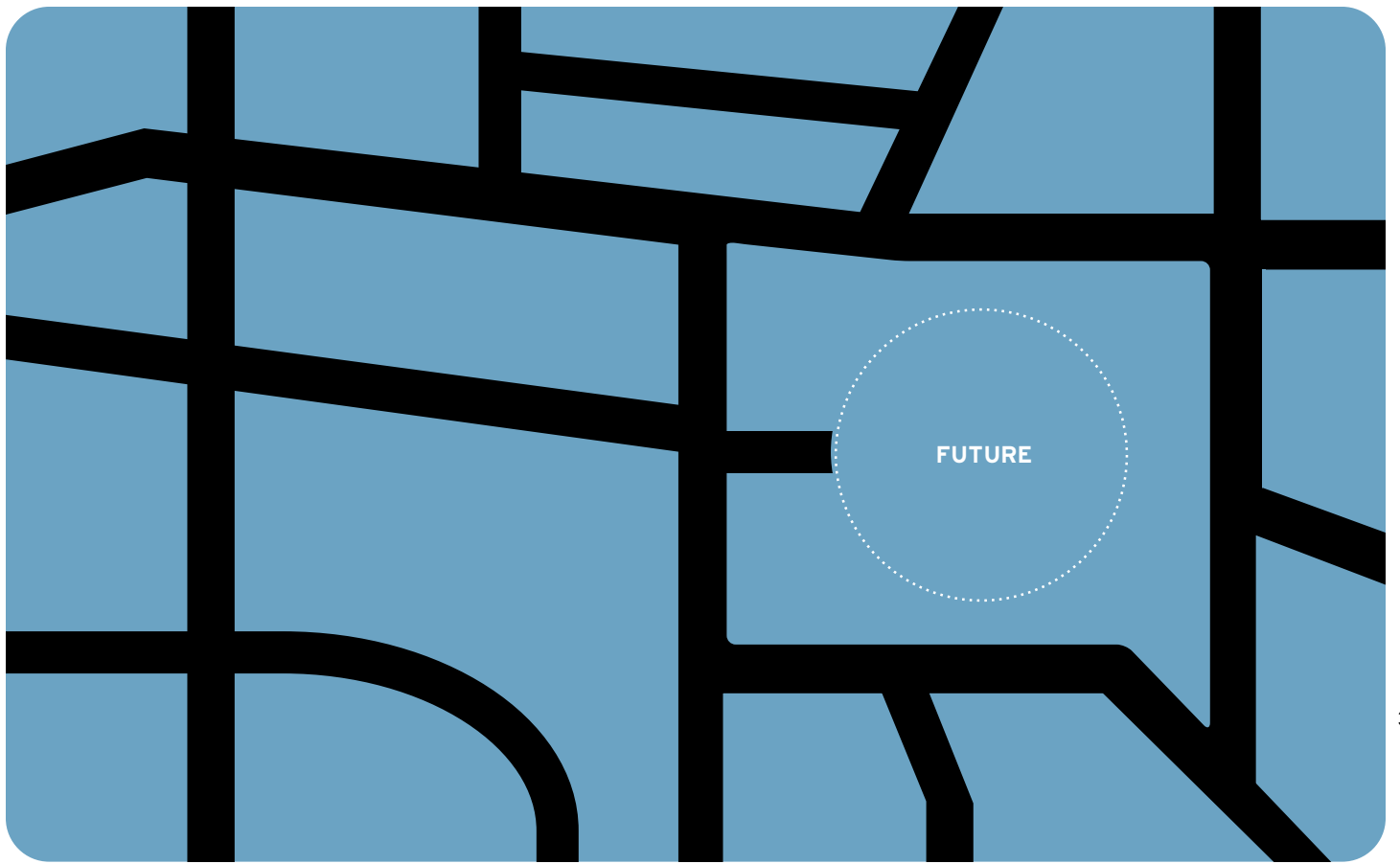
Source: The State of the Convenience Store Industry, National Association of Convenience Stores, 1999.

Use the company's most recent annual sales and profit data (or data for specific regions if they are significantly different).

Tool 5. Key competitors for core categories

	PRIMARY COMPETITOR	SECONDARY COMPETITOR
GASOLINE		
TOBACCO		
FOUNTAIN DRINKS		
BEER/WINE/ LIQUOR		
PACKAGED BEVERAGES		
FOODSERVICE		
CANDY/GUM		
SALTY SNACKS		
MILK PRODUCTS		
BUSINESS SERVICES		
OTHER (SPECIFY)		

To obtain data, ask a sample of regional managers or individual store managers to identify their primary and secondary competition. Or, during the consumer research recommended, ask consumers directly where else they buy this merchandise if they could not do so at "this convenience store." Then consolidate the data by relevant segments (total company, region, etc.).



THE OPPORTUNITY AHEAD

- The need for convenient shopping options has never been as great as it is today. Consumers of all ages, income levels, lifestages and lifestyles recognize the value of convenience and demand it as a key prerequisite for selecting a specific outlet to shop. As a result, **never has there been a greater opportunity for the convenience industry.**

In spite of the competitive challenges facing the industry, consumers still value the convenience store: It's accessible, compact, efficient and simple. Yet the industry often has allowed others to take ownership of the convenience proposition by failing to provide convenience in all aspects of the business; by undermarketing its strengths and offerings; and by failing to evolve and expand the offering to suit the needs of today's consumers.

For the most part, the industry continues to view convenience in a single dimension – the convenient offering – when it now encompasses much more: a powerful, convenient offering delivered by high-quality people in a high-quality facility.

To be successful today is to understand that what needs to be convenient to consumers is very different than it was two decades ago. To be successful today requires understanding the consumers' new definition of convenience, then being willing to take a strategic leap to expand convenience beyond the traditional base.

Incremental steps will not suffice. The opportunity is great; the leap must be too.

“We hope you find this strategic blueprint a valuable tool to help you think through and evolve your business model for the future.”

The NACS/Coca-Cola Leadership Council

- ¹ WSL Strategic Retail Data Base, 1986-2000.
- ² Consumer Purchase Indicators: Cross Channel Trends, AC Nielsen Homescan, July 2000.
- ³ Consumer Purchase Indicators: Cross Channel Trends, AC Nielsen Homescan, July 2000.
- ⁴ The Outlook for the Convenience Store Industry through 2005 and Beyond, National Association of Convenience Stores, 2000.
- ⁵ The State of the Convenience Store Industry, National Association of Convenience Stores, 1992, 1999.
- ⁶ The State of the Convenience Store Industry, National Association of Convenience Stores, 1992, 1999.
- ⁷ Consumer Purchase Indicators: Cross Channel Trends, AC Nielsen Homescan, July 2000.
- ⁸ The Outlook for the Convenience Store Industry through 2005 and Beyond, National Association of Convenience Stores, 2000.
- ⁹ "Profile of the Convenience Store Customer," Convenience Store News/NFO Panel, February 2000.
- ¹⁰ The State of the Convenience Store Industry, National Association of Convenience Stores, 1992, 1999.
- ¹¹ Consumer focus groups conducted for the NACS/Coca-Cola Leadership Council, September 2000.
- ¹² Telephone interviews conducted with store managers for the NACS/Coca-Cola Leadership Council, August/September 2000.
- ¹³ "Profile of the Convenience Store Customer," Convenience Store News/NFO Panel, February 2000.
- ¹⁴ "Profile of the Convenience Store Customer," Convenience Store News/NFO Panel, February 2000.
- ¹⁵ "Profile of the Convenience Store Customer," Convenience Store News/NFO Panel, February 2000.
- ¹⁶ How America Shops™ 2000, I shop therefore I am,™ WSL Strategic Retail, February 2000.
- ¹⁷ "Profile of the Convenience Store Customer," Convenience Store News/NFO Panel, February 2000.
- ¹⁸ "Profile of the Convenience Store Customer," Convenience Store News/NFO Panel, February 2000.
- ¹⁹ U.S. Department of Census and Statistics; 50+ Marketing Directions, WSL Strategic Retail, 2000.
- ²⁰ Dr. Rapaille's most recent analysis helped create Chrysler's new PT Cruiser.
- ²¹ The Emotional Quotient was defined by WSL Strategic Retail based on findings from its biannual How America Shops consumer research.

The NACS/Coca-Cola Leadership Council, comprising senior executives of 12 member companies from across the United States, commissioned the research included in this report. In collaboration with executives from NACS and The Coca-Cola Company and Willard Bishop Consulting, Ltd., the facilitating consultant, it selected WSL Strategic Retail to conduct the research and develop a strategic recommendation. WSL Strategic Retail used a five-phase research approach.

Phase 1: The State of Convenience 2000

An in-depth analysis of current convenience trends; a comparison of the convenience store industry to other major sources of convenience encompassing U.S. retail venues, key global trends and the Internet. This analysis was based on an examination and fresh interpretation of existing industry research.

Phase 2: The Shoppers' Perspective on Convenience

Twelve focus groups with convenience store shoppers across the U.S.: frequent and infrequent shoppers, men and women, teens and the mature market.

Phase 3: A View from the Trenches – The Store Managers' Perspective

Telephone interviews with 20 convenience store managers to obtain realistic insight from those closest to the customers.

Phase 4: Social Scientists' Perspective on Convenience

Input from a panel of leading sociologists and anthropologists into how consumers define convenience today, and how to understand the criteria for satisfying consumers' convenience needs in the future.

Phase 5: A Blueprint for Convenience Stores

A strategic vision to break the code of convenience for the future, and a practical blueprint with concepts for companies to test.

Dairy Mart Convenience Stores, Inc.

Hudson, OH
Robert Stein, President, CEO

East Coast Oil Corp.

Richmond, VA
Dick Riley, President

E-Z Mart Stores

Texarkana, TX
Sonja Hubbard, CEO

Miller Oil Company

Norfolk, VA
Jeff Miller, President

NACS

Alexandria, VA
Kerley LeBoeuf, President
Teri Richman, Senior Vice President,
Research & Industry Affairs

Quick Chek Food Stores

Whitehouse Station, NJ
Dean Durling, Chairman, CEO

7-Eleven, Inc.

Dallas, TX
Jim Keyes, President & CEO

Sheetz, Inc.

Altoona, PA
Stan Sheetz, President, CEO

SnappySack Corp.

Henderson, NV
Scott McManus, Owner

Spectrum Stores, Inc.

West Point, GA
Woody Woodroof, President, CEO

Super Stop, Inc.

Meridian, MS
Doug Deweese, Vice President-Sales

Tosco Marketing Co.

Tempe, AZ
Robert Lavinia, President, CEO

Ultramar Diamond Shamrock Corp.

San Antonio, TX
Chris Havens, Executive Vice President

Wawa, Inc.

Wawa, PA
Richard Wood, President, CEO

The Coca-Cola Company
Jack Stahl, President and
Chief Operating Officer

Coca-Cola Enterprises
Dan Marr, Senior Vice President
Chief Customer Officer
Joe Burke, Vice President
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Sandy Douglas, Executive Vice President
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The National Association of Convenience Stores (NACS) is an international trade association representing over 2,200 retail and 1,800 supplier members. The U.S. convenience store industry, with 119,751 stores across the country, posted \$234 billion in total sales for 1999, with \$134 billion in motor fuels sales.

NACS and The Coca-Cola Company wish to express their appreciation to the members of the NACS/Coca-Cola Leadership Council, whose corporate logos are represented on the back cover, for their contributions to this study.

Additional information regarding NACS, and the convenience store and petroleum marketing industry, can be accessed at C-Store Central, the industry website owned and operated by NACS, at www.cstorecentral.com.

For additional copies of this study, contact NACS at (800) 966-6227 or Coca-Cola North America at (800) 808-8877.





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