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Dedicated to serving the Georgia COAM industry
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Assembly convenes

COAM industry to monitor action at the Capitol

Georgia Amusement Journal

With the 2019 Georgia General Assembly convening Jan. 14, COAM industry representatives will be monitoring legislation closely looking for ways to help the industry grow, increase its contributions to Georgia's educational programs, and protect its interests.

"As the session runs from January into early spring, our association will keep a close eye on legislation moving through the General Assembly that could affect our industry specifically or small business in general," said Shawn Fellows, president of the Georgia Amusement and Music Operators Association, in his monthly column for the *Georgia Amusement Journal* (see Page



File photo

THE 2019 GENERAL ASSEMBLY convened Jan. 14 at the Georgia State Capitol

4). "Through GAMOA, we have a strong voice at the state Capitol with top-notch government relations professionals who combine expertise in policy with a strong network of connections to top decision-makers under the gold dome."

in Atlanta. The state's 236 legislators includes 42 first-time lawmakers.

After November's elections, the Georgia General Assembly will look quite differently than in 2018. Nearly one in six seats have changed hands since last year. Some lawmakers

See ASSEMBLY Page 3

C-store group to host annual legislative reception Jan. 29

Georgia Amusement Journal

The Georgia Association of Convenience Stores (GACS) will host its annual Legislative Reception Tuesday, Jan. 29, at 4:30 p.m. in Atlanta, on the 20th floor of the James H. "Sloppy" Floyd Building.

The event will give attendees a chance to become acquainted with

newly appointed and veteran legislators alike, while providing an opportunity for GACS members to bring their industry-specific



concerns before lawmakers as the 2019 Georgia General Assembly kicks into gear. The Georgia Beverage Association and Georgia Food Industry Association will be attending the reception as well, to present a

"united front" as members of each respective organization prepare to educate this year's attending legislators on the important role convenience stores play in their communities and how lawmakers can best support the industry.

The reception is free for GACS

See RECEPTION Page 8

C-store retailers more optimistic for '19

Convenience Store News

Convenience store retailers are slightly more optimistic about their business prospects for 2019 than they were last year at this time when looking toward 2018.

According to the 17th annual *Convenience Store News Forecast Study*, 62.5 percent of the c-store retailers surveyed have optimistic views about their business in the coming year. That compares favorably to the 57 percent of c-store retailers that felt positive about their business prospects on the eve of the just-completed year.

A whopping 82.9 percent of retailer respondents expect their sales per store to increase in 2019, up from 75.1 percent a year ago. Only 5.7 percent expect a decline in same-store sales. Those expecting increases cited several factors for their optimism, including adding more grab-and-go and ready-to-eat food to their stores, growth in beverage sales, and increased availability of healthier food options.

Perhaps even more significantly, 25 percent of retailer

See FORECAST Page 10



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Assembly

from Page 1

lost re-election, others ran for higher office and several retired. A total of 42 freshmen will part of the 236-seat Georgia House and Senate (two seats won't be filled until after special elections next month).

Democrats benefited from the turnover, picking up 13 seats, mostly in north metro Atlanta. Republicans now hold a 58 percent majority at the Capitol after they controlled about two-thirds of legislative seats during the past two years.

As usual, the first week of the session dealt with a budget draft and the selection of committee chairmen and member committee assignments. The General Assembly took a break for the King holiday on Jan. 21, and now the work begins.

You can search for legislation by visiting www.legis.ga.gov and locating the search box in the top-right corner of the website. Then enter the bill number and select "HB" if it's a House bill or "SB" if it's a Senate bill.

Tech Tips

Keep your machines clean

Well maintained and properly functioning COAMs are vital to ensure consistently strong play and the resulting healthy returns for licensees. Following are some "Best Practices" to help you keep your machines in their best revenue-producing condition:

- 1) Keep machines clean:
 - Compressed air for inside.
 - Ammonia-free glass cleaner for monitor, etc.
- 2) Check connections:
 - They can vibrate loose in transport.
- 3) Maintain bill acceptors:
 - ICT (International Currency Technologies)

recommends that customers clean the bill acceptors with a soft cleaning cloth moistened with mild, non-abrasive and non-alcohol cleaning solution at least every four months.

- LED and sensor housings are the main components the need to be cleaned. They are the emitter and recipient of the light source and must be maintained properly and free of dust.
- Calibration is recommended if a decline in acceptance rate occurs. ICT has developed a calibration test tool that can be ordered from them. Visit www.ict-group.com.tw for more information.

Banilla's technician event in Duluth

Georgia Amusement Journal

Banilla Games, along with representatives from VSR Industries, CPI/MEI, Goldfinger, and Astro, will host its third annual Workshop and Technician Appreciation Day Thursday, Jan. 31, from 10 a.m. to 2 p.m. at Sonesta Gwinnett Place in Duluth.

Representatives from each company will discuss new technology, offer hands-on technical information, and answer questions about the industry.

"It's a fun day," said Michael "Smitty" Smith of

Banilla. "It's the largest gathering of operators and technicians in Georgia. And it's a day of appreciation for technicians for all they do for our industry."

All COAM members and technicians are invited and encouraged to attend the free event. Lunch will be provided, and drawings for prizes will be held every half hour throughout the event.

Sonesta Gwinnett Place is located at 1775 Pleasant Hill Rd. in Duluth. For more information, and to RSVP, contact Banilla at (252) 329-7977.

Connect, power up machines

To ensure accurate reporting of financial data to the Central Accounting System, the Georgia Lottery Corporation (GLC) says it is imperative the Location License Holders (LLHs) ensures all equipment remains connected to the site controller and powered up at all times.

The GLC maintains a record of those LLHs that are repeat offenders of failing to ensure the continuous connectivity and operation of Class B COAMs.

Failure to comply with these procedures may result in fines up to \$50,000, suspension and/or revocation of the license.



2019 COAM location sweep and master push calendar

ACCOUNTING WEEK START	ACCOUNTING WEEK END	LOCATION SWEEP DATE	MASTER PUSH DATE	ACCOUNTING WEEK START	ACCOUNTING WEEK END	LOCATION SWEEP DATE	MASTER PUSH DATE
30-Dec-18	05-Jan-19	09-Jan-19	15-Jan-19	30-Jun-19	06-Jul-19	10-Jul-19	16-Jul-19
06-Jan-19	12-Jan-19	16-Jan-19	23-Jan-19*	07-Jul-19	13-Jul-19	17-Jul-19	23-Jul-19
13-Jan-19	19-Jan-19	23-Jan-19	29-Jan-19	14-Jul-19	20-Jul-19	24-Jul-19	30-Jul-19
20-Jan-19	26-Jan-19	30-Jan-19	05-Feb-19	21-Jul-19	27-Jul-19	31-Jul-19	06-Aug-19
27-Jan-19	02-Feb-19	06-Feb-19	12-Feb-19	28-Jul-19	03-Aug-19	07-Aug-19	13-Aug-19
03-Feb-19	09-Feb-19	13-Feb-19	20-Feb-19*	04-Aug-19	10-Aug-19	14-Aug-19	20-Aug-19
10-Feb-19	16-Feb-19	20-Feb-19	26-Feb-19	11-Aug-19	17-Aug-19	21-Aug-19	27-Aug-19
17-Feb-19	23-Feb-19	27-Feb-19	05-Mar-19	18-Aug-19	24-Aug-19	28-Aug-19	04-Sep-19*
24-Feb-19	02-Mar-19	06-Mar-19	12-Mar-19	25-Aug-19	31-Aug-19	04-Sep-19	10-Sep-19
03-Mar-19	09-Mar-19	13-Mar-19	19-Mar-19	01-Sep-19	07-Sep-19	11-Sep-19	17-Sep-19
10-Mar-19	16-Mar-19	20-Mar-19	26-Mar-19	08-Sep-19	14-Sep-19	18-Sep-19	24-Sep-19
17-Mar-19	23-Mar-19	27-Mar-19	02-Apr-19	15-Sep-19	21-Sep-19	25-Sep-19	01-Oct-19
24-Mar-19	30-Mar-19	03-Apr-19	09-Apr-19	22-Sep-19	28-Sep-19	02-Oct-19	08-Oct-19
31-Mar-19	06-Apr-19	10-Apr-19	16-Apr-19	29-Sep-19	05-Oct-19	09-Oct-19	16-Oct-19*
07-Apr-19	13-Apr-19	17-Apr-19	23-Apr-19	06-Oct-19	12-Oct-19	16-Oct-19	22-Oct-19
14-Apr-19	20-Apr-19	24-Apr-19	30-Apr-19	13-Oct-19	19-Oct-19	23-Oct-19	29-Oct-19
21-Apr-19	27-Apr-19	01-May-19	07-May-19	20-Oct-19	26-Oct-19	30-Oct-19	05-Nov-19
28-Apr-19	04-May-19	08-May-19	14-May-19	27-Oct-19	02-Nov-19	06-Nov-19	13-Nov-19*
05-May-19	11-May-19	15-May-19	21-May-19	03-Nov-19	09-Nov-19	13-Nov-19	19-Nov-19
12-May-19	18-May-19	22-May-19	29-May-19*	10-Nov-19	16-Nov-19	20-Nov-19	26-Nov-19
19-May-19	25-May-19	29-May-19	04-Jun-19	17-Nov-19	23-Nov-19	27-Nov-19	04-Dec-19*
26-May-19	01-Jun-19	05-Jun-19	11-Jun-19	24-Nov-19	30-Nov-19	04-Dec-19	10-Dec-19
02-Jun-19	08-Jun-19	12-Jun-19	18-Jun-19	01-Dec-19	07-Dec-19	11-Dec-19	17-Dec-19
09-Jun-19	15-Jun-19	19-Jun-19	25-Jun-19	08-Dec-19	14-Dec-19	18-Dec-19	24-Dec-10*
16-Jun-19	22-Jun-19	26-Jun-19	02-Jul-19	15-Dec-19	21-Dec-19	26-Dec-19*	02-Jan-20*
23-Jun-19	29-Jun-19	03-Jul-19	09-Jul-19	22-Dec-19	28-Dec-19	02-Jan-20*	08-Jan-20*

*Indicates sweep or push date has been changed to accommodate holiday

Note: Holidays on a Thursday and Friday may delay the availability of the Location Period Accounting Report on the following Monday



Journal Opinion

Session success depends on all of us

By Shawn Fellows
GAMOA President

This month marks the dawn of a new era in the governance of Georgia, as Gov. Brian Kemp and Lt. Gov. Geoff Duncan begin their tenures in office, and the General Assembly kicks off the 2019 session with dozens of new members.

Even though the governorship is staying in the hands of the same party, any new administration brings in its own people. Before his inauguration, Kemp announced his new staff, which includes field representatives in all regions of the state who could serve as great points of contact for our small businesses.

This team will be headed up by Martha Zoller of Gainesville, who previously served in a similar role for U.S. Sen. David Perdue. The regional staff are North Georgia Field Office Representative Wesley Ross, Middle Georgia Field Office Representative Blake Poole and South Georgia Field Office Representative Brad Hughes.

I encourage you to reach out and build a relationship with the field rep in your region, as well as with your local state representative or senator – especially if they're freshmen members. As the new gover-

nor's staff begins its important work and continues to learn about different Georgia industries, it's incumbent upon us to tell our industry's story and ensure that our newly elected officials have a full understanding



Shawn Fellows

of our successful partnership with the Georgia Lottery Corp. and our contributions to Georgia's economy.

Through our partnership with the state, our industry generates \$60 million a year for the HOPE and Pre-K programs. This has provided critical new funding to

those popular – and needed – programs during years when demands on the programs began to outpace revenues.

On the economic front, particularly in rural Georgia, our products help many conven-

ties. There's bipartisan recognition of the needs in rural areas, and it's our job to educate elected officials about how our businesses and our industry are helping.

In that vein, Gov. Kemp has highlighted his commitment to economic growth in rural Georgia and to making Georgia No. 1 in the nation for small business. That's a welcome message for many of our members who fall into both categories.

As the session runs from January into early spring, our association will keep a close eye on legislation moving through the General Assembly that could affect our industry specifically or small business in general. Through GAMOA, we have a strong voice at the state Capitol with top-notch government relations professionals who combine expertise in policy with a strong network of connections to top decision-makers under the gold dome.

Our legislative team provides a first line of defense in a fast-moving legislative environment, and we greatly appreciate the work they'll do over the next three months. It gives us a unified voice and strength in numbers, and your membership in GAMOA helps keep that impor-

See GAMOA Page 5

Our legislative team provides a first line of defense in a fast-moving legislative environment, and we greatly appreciate the work they'll do.



ience stores remain open and provide retail services for populations that need them. That, in turn, provides stability to a county's tax base in areas where that's sorely needed.

Rural development and access to great education were major issues in last year's campaign for both political par-

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COAM calendar

— REPORTING DATES —

Jan. 20: Each monthly report should be submitted by Location License Holders in electronic format via the www.gacoam.com website as required by the GLC by the 20th of each following month.

— MEETINGS/OTHER —

Jan. 31: Technicians Appreciation Day, Atlanta
Feb. 7: AMOA State Council Meeting, San Antonio
March 26-28: Amusement Expo, Las Vegas Convention Center

Write us

The *Georgia Amusement Journal* welcomes letters to the editor. Letters must include the writer's name and address. The word limit is 300. Mail to Georgia Amusement Journal, P.O. Box 4307, Butte MT 59702, or you can email us at paul@tashcommunications.com. The *Journal* reserves the right not to print letters it finds objectionable.

Journal Opinion

AMOA set for State Council Meeting

By Lori Schneider
AMOA Executive VP

AMOA will conduct its annual State Council Meeting with a theme of “Today’s Vision, Tomorrow’s Reality” at the Hyatt Regency San Antonio Riverwalk in San Antonio, TX, Thursday, Feb. 7, through Saturday, Feb. 9.

The annual gathering is one of the most productive meetings on the industry calendar by providing state leaders the opportunity to engage and share both challenges and opportunities in their respective regions. This year’s meeting will feature keynote speaker Paul Jenson, partner at Taft Stettinius and Hollister LLP, who will provide an update on gaming across the country, including sports



Lori Schneider



The annual AMOA event is open to state association executives and state association leaders across the country.

gambling.

The annual AMOA event is open to state association executives and state association leaders across the country.

States currently without a state association are encouraged to attend as well.

Sponsorships are also available for this important industry meeting. Those companies sponsoring at the dinner level are invited to send a representative to sit in on the meeting and participate on one of the factory panel discussions being conducted on Friday, Feb. 8.

For additional information regarding the 2019 AMOA State Council Meeting, contact Lori Schneider at lori@amoa.com or by calling the AMOA headquarters at 1-800-937-2662.

AMOA is the parent organization of GAMOA. For more information about the AMOA, visit www.amoa.com.

Now’s the time to tackle threat of data breaches

Courtesy of Moore Colson CPAs

Are data breaches the new normal? It certainly seems that the frequency and severity of cyberattacks have increased in the past few years. Just this year, Facebook, Marriott, and Google+ had their data compromised – and with that data breach comes a hefty cost – not only monetary – but also to an organization’s brand and overall consumer trust.

IBM’s 13th annual Cost of a Data Breach study, the industry’s gold-standard benchmark research independently conducted by Ponemon Institute, reports the global average cost of a data breach is now \$3.86 million, up 6.4 percent over the previous year. The average cost for each lost or stolen

record containing sensitive and confidential information is now \$148, which has increased by 4.8 percent year over year.

This is a good time to think about your own business. How secure is your data? What security policies do you have in place to prevent data leaks? Do you know all of the endpoints on your company’s network? These are some – but certainly not all – of the questions you should ask yourself.

You should consider working with an expert you trust to provide guidance in this complex and shifting environment. Moore Colson can help you ensure your cybersecurity program has been adequately implemented to address and minimize your organization’s cyber risks.

Our Risk Advisory and Compliance Services team can help you achieve the following:

- Identify the factors contributing to your company’s overall cyber risk.
- Assess your company’s cybersecurity risk and preparedness.
- Evaluate whether your company’s cybersecurity preparedness is aligned with its risks.
- Determine risk management practices and controls that are needed or need enhancement, in addition to actions that should be taken to achieve the desired state.
- Outline risk management strategies.

GAMOA

from Page 4

tant work going. That said, our organization’s job gets much easier in the long term if all of us engage locally with our elected officials.

GAMOA congratulates the new statewide elected officials and state legislators and hopes for successful and productive 2019 session to keep Georgia moving in the right direction.

GAMOA’s mission: “To Promote and Serve Georgia’s Coin Operated Amusement and Music Industry.”

Learn how to deal with chargebacks

Convenience Store News

Every merchant has to deal with chargebacks, and knowing the right way to handle these disputes can save both time and money.

Caleb Burke with CITGO Petroleum recently presented a free Conexus webinar, “Chargebacks 101: The Basics.”

“Fraud accounts for more than 80 percent of chargebacks,” he said. “Overall, fraud has increased 60 percent since 2015. And 80 percent of chargeback fraud comes from what issuers consider ‘friendly’ fraud by a customer who has a malicious intent, buyer’s remorse, or didn’t qualify for a refund.”

Burke noted that fraud is migrating to non-EMV-compliant businesses. If a retailer is waiting to convert to EMV, he recommended requiring ZIP verification, installing a POS prompt for last four

digits of card for in-store sales, and limiting the purchase of high fraud merchandise, such as gift cards and cigarette cartons.

Overall, the burden of proof lies with the retailer in a charge dispute.

“Merchants should have a roadmap for how to handle chargebacks,” Burke said.

For example, retailers should review chargebacks for validity, respond to all requests in a timely manner and provide all relevant documentation during initial re-presentation (the processing of re-presenting a transaction to the customer’s issuing bank).

The major credit card companies have made recent changes in chargebacks, namely Visa’s Claim Resolution that went into effect April 2018.

“This was designed to simplify chargebacks ... and streamline the customer experience,” he said.



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Retail Matters

Anti-trafficking event Jan. 26

The Georgia Association of Convenience Stores will host a one-day public awareness and outreach event against human trafficking, called “Linking Freedom In Our Backyard,” Saturday, Jan. 26, in Atlanta.

The event, in which volunteers from the host city are invited to participate in, will take place from 8:30 a.m. to 2:30 p.m. at Mt. Paran Church, 2055 Mt. Paran Rd. NW.

Every year, missing children and victims of human trafficking are recovered because of this outreach and individuals are inspired to turn awareness into year-round action to stop human trafficking, according to a statement on the GACS website – www.gacs.com.

Here are the components of the event:

Check-in and Resource Fair, 8:30 a.m.

Program and training, 9:15 a.m.: The beginning of the event will include a presentation on human trafficking and what usually happens with human trafficking surrounding the Super Bowl. It will conclude with training and preparation for the outreach component.

Outreach, 11:30 a.m.: The second portion of the event will involve volunteer teams of 2-4 people driving to local businesses (primarily convenience stores) on assigned routes and distributing key awareness materials, including Freedom Stickers and Missing Children’s Books. These businesses become eyes and ears in the community to spot human trafficking and save lives, GACS says. The outreach is immediately following the training and will be com-

pleted the same day.

In Our Backyard is a national organization working “to create a pathway of freedom for those trapped in human trafficking.” The Jan. 26 event in Atlanta is the group’s 10th year conducting the program around the Super Bowl,



which will be played in Atlanta Feb. 3.

The goal of the cooperative efforts is “to bring attention to this atrocity and come alongside the host community as we take coordinated and effective action to stop human trafficking surrounding the Super Bowl and beyond,” IOB literature says. IOB recognizes geography, cli-

mate, politics, culture, socioeconomic, gender, and racial factors have implications on how human trafficking is collaboratively addressed. IOB’s objectives for this program are to:

- Bring nine years of expertise to the host community about what “normally” happens regarding human trafficking at large events, dispel myths, and share best practices from previous years;

- Reach out to and aid in recovery of victims of human trafficking through safe and coordinated efforts with law enforcement, government agencies, and reputable service providers;

- Train and mobilize the business community, with particular emphasis on convenience stores in conjunction with IOB’s Convenience Stores Against Trafficking program, to recognize and safely report missing and endangered children and potential trafficking situations;

- Conduct a community-wide outreach event (Linking Freedom In Our Backyard), distributing Freedom Stickers and Missing Children Booklets, to raise public awareness of human trafficking and empower individuals to take well-informed, safe and meaningful action to stop human trafficking;

- Raise awareness in the host city by offering speakers for events who have extensive experience both in anti-human trafficking efforts and how those efforts intersect with Super Bowl;

- And, work to raise awareness of the truth about human trafficking through interviews and media coverage, both locally and nationwide.

Reception

from Page 1

members, but attendees must register at www.gacs.com/events/event-registration prior to the event. Contact the GACS office at (770) 736-9723 with any questions.

Since 1973, GACS has been the voice for Georgia’s convenience store industry. Its staff monitors legislation daily during the Georgia General Assembly January through April and reports legislation to the membership on a regular basis.

GACS set up the GACS Action Center through VoterVoice, a nationally recognized grassroots system whose clients include NACS and the Georgia Chamber of Commerce. VoterVoice matches members with their state and federal elected officials, both at where they live and work. More than 1,300 GACS member employees can now contact their representatives with a simple touch of a button. Go to www.gacs.com to find your legislator.

C-store charity reaches \$1 billion

NACS News

Convenience stores contribute or collect more than \$1 billion to charities annually, according to a national survey of retailers released this month by the National Association of Convenience Stores (NACS).

Overall, 95 percent of convenience stores support charitable causes, with 66 percent of these stores supporting five or more charitable causes. Nearly all companies support local charities (91 percent) such as church groups, shelters, food banks and other non-sports groups. And approximately half of all retailers (47 percent) also support national charities. Also, more than three in four retailers (75 percent) contribute to youth sports groups and more than two-thirds (69 percent) contribute to local schools via PTAs and other fundraising activities.

In addition, convenience stores also contribute to local charities during specific times of need. Four in five convenience store companies (75 percent) say they’ve made donations when there was a specific emergency or crisis in the community.

The median charitable contribution per store is \$3,925 in direct contributions and \$3,054 in donations collected. Cumulatively, the nearly 155,000 convenience stores in the United States contribute or collect \$1.03 billion a year to benefit charitable

groups and causes.

“We often say in our industry that ‘c-store’ doesn’t just stand for convenience store; it stands for community store and these results clearly demonstrate the commitment our industry has to the communities they serve,” said Jeff Lenard, NACS vice president of strategic industry initiatives.

Convenience retailers noted that their locations in communities also make them convenient places for groups to hold events: 61 percent allow their property to be used by local groups for fundraising events, whether car washes, cookie sales or direct fundraising.

More than three in four (76 percent) retailers also say they make local product/food donations to food banks and other groups to support those in need; of this group, 67 percent donate food and 76 percent donate beverages.

“Being a small, local chain, we like to keep our charitable giving to local organizations, where our customers know the people it is benefiting and can see their donations at work,” said Dennis McCartney with Landhope Farms (Kennett Square, PA).

A total of 90 NACS retail member companies participated in the association’s Q4 2018 Retailer Sentiment Survey that featured questions about charitable giving.

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Retail Matters

Forecast

from Page 1

respondents think 2019 is going to be their “best year ever.” Again, that’s more than the 20.2 percent who felt that kind of enthusiasm a year ago. Among the reasons they cite for their optimism:

- New products;
- Continued positive fallout from President Trump’s economic policies;
- Availability of money (ability to borrow);
- Construction booming in our markets;
- Same-store sales increases are strong;
- Continued strong culture and leadership at our company;
- Technology advances and increased investment in new tech;
- Strong consumer confidence;
- Sales increases in the third and fourth quarters of 2018; and
- Tax cuts and higher incomes of customers.

Retailer optimism about their own company’s prospects is high despite less positive feelings about economic conditions in general for the coming year compared with a year ago. Just under 70 percent of retailer respondents said they view overall conditions for the U.S. economy in a positive light. That’s a little less than the 73.6 percent who felt positive last year about the economy.

On the other hand, fewer retailers this time around have negative views on the economy for the coming year. Just 4.1 percent see difficult economic times ahead – half the percentage of a year ago.

On average, c-store retailers predict their total in-store sales will grow by 3.4 percent in 2019. They were slightly more optimistic a year ago, when they predicted 2018 in-store sales would rise by 3.9 percent – after a relatively soft year in 2017 when actual in-store sales rose only 2.1 percent.

Preliminary 2018 results indicate in-store sales will likely grow 2-3 percent. Not surprisingly, retailers expect foodservice to lead the way in in-store sales growth in 2019. They predict a 6-percent gain in sales of prepared food and hot, cold and frozen dispensed beverages.

Retailers are also bullish on al-



ternative snacks (projecting a 3.6 percent sales gain), salty snacks (3.4 percent gain) and packaged

cent decline).

Retailers are unanimous in their belief that cross-channel competition will either increase or stay the same in 2019. A majority (60.9 percent) consider grocery home delivery services like Amazon Fresh and Walmart’s Jet.com as their biggest cross-channel competitive threat.

About half (52.2 percent) consider Amazon overall to be their biggest cross-channel competitor, slightly up from a year ago. However, the threat that shows the biggest one-year increase in concern is that of convenience delivery services, such as those offered by goPuff. More than half of retailer respondents (56.5 percent) cite these services as a threat for 2019 vs. only 28.7 percent a year ago.

Motor fuel prices (61.9 percent), healthy eating trends (41.2 percent), labor issues/regulations (34.7 percent), tobacco and electronic cigarette regulations (34 percent) and emerging technologies (30.4 percent) are the top five factors that will have the biggest impact on convenience store sales in 2019, according to the retailers surveyed.

“Fuel pricing always affects

store sales,” one retailer remarked in commenting on what will impact sales in 2019. Another looked further into the future: “Alternative fuel will decrease the need for gasoline by 2025.”

Comments about rising labor costs were also common. “A lot of regulations and new laws will cost our company more,” said one retailer. “Labor regulations regarding training will create additional costs. Mandatory hourly wage increases are coming,” said another.

Tobacco regulation is a concern, too. “Regulation of tobacco and e-cigs could materially impact the channel, especially if age is increased and products withdrawn from the shelves,” said one retailer. “Vape is a huge category that could be greatly affected by regulation,” added another.

Retailers were also asked to talk about the major initiatives their companies plan to implement in 2019 to increase sales and profits.

“We are planning an e-commerce and internet marketing effort to drive customers into the store from the pumps,” said one operator.

Another said they will focus on employee training to increase “Plus Sales” efforts. Several mentioned improving their loyalty programs and/or driving new membership. And many talked about further developing their foodservice programs and improving their proprietary food offerings.

Interestingly, in an industry where store count has remained relatively flat over the past several years, nearly 60 percent of respondents expect to increase their store count in 2019. Less than 1 percent think they’ll reduce their number of stores.

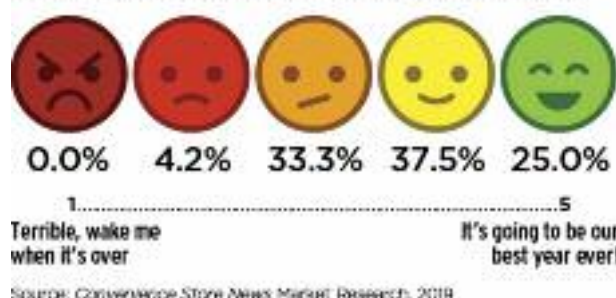
Retailers were also asked to name their top concerns about business conditions in 2019. Among the responses were:

- E-commerce and internet taking sales away from stores;
- Black market sales of regulated products;
- Labor shortage intensifies;
- Increase in fuel costs;
- More competition, especially in foodservice;
- Additional regulations adding a level of complexity;
- Rising interest rates;
- Growth of electric cars;
- Pricing concerns due to tariffs; and
- Potential impulsive decisions by President Trump.

FORECAST 2019 SNAPSHOT		
	DOLLAR SALES	UNIT VOLUME
Total store	+3.4%	n/a
Foodservice	+6.0%	+5.9%
Alternative snacks	+3.6%	+3.5%
Salty snacks	+3.4%	+2.8%
Packaged beverages	+3.3%	+2.5%
Other tobacco products	+2.5%	+1.7%
Beer	+2.4%	+2.1%
Candy	+2.4%	+1.5%
Edible grocery	+1.2%	+1.8%
Motor fuels	+1.1%	+1.5%
Cigarettes	+0.5%	-0.4%

Source: Convenience Store News Market Research, 2018

On a scale of 1 to 5, how optimistic do you feel about your business in 2019?



beverages (3.3 percent gain).

In terms of volume, retailers are less sanguine about edible grocery units (1.8 percent gain projected), motor fuel gallons (1.5 percent gain) and cigarette units (0.4 per-



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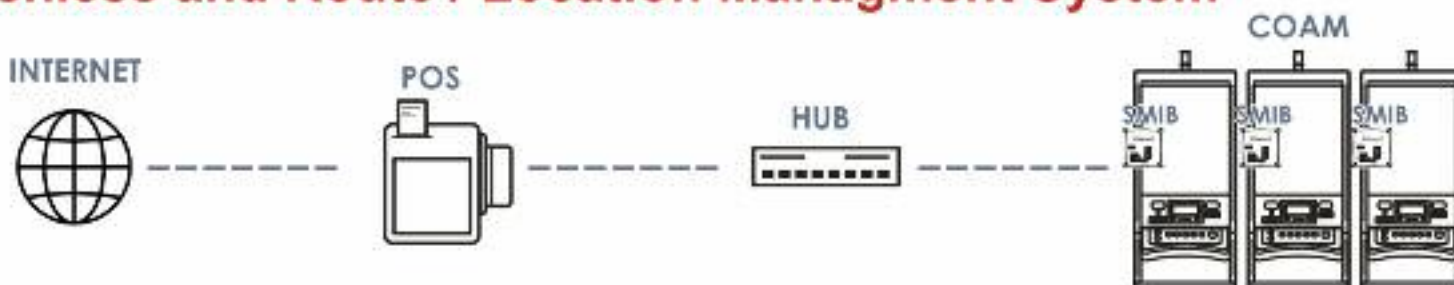


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- 21+ Decals One-time Payment Quarterly Monthly Number of Decals _____
 Quarterly & monthly payments due the by the 5th of each month.

Location Membership: (Location License Holders)

- Location License Membership (1-4 Locations) \$100 GA LLH # _____
- Maximum Location License Membership (5+ Locations) \$500 GA LLH # _____

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- Level 1 Membership Professional Services \$250
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