

Convenience Conference & Exhibition 2010

Conference Schedule 22nd September

- 8:30am Registration & exhibition opens
- 9.00am Conference starts
- 9:00am-9:15am Deborah Robinson, Owner, Cult Status Ltd**

Chairman's opening remarks

Deborah Robinson is a passionate food marketer with over 25 years retail experience. As Director of Food Marketing at the UK's Co-operative Group, Deborah developed formats including layout, macro space allocation, merchandising and design for petrol forecourts, convenience stores and supermarkets. She delivered a programme of over 700 refits per annum for three consecutive years delivering significant return on investment. The Co-operative Group won the prestigious "Convenience chain of the YEAR" award for the last two years.

While at the Co-operative Group Deborah developed a 3000 plus own branded product range with clear quality tiers providing customers with real choice and value for money. She introduced competitive advantage with a number of unique sub brands including "Grown by us" and "Truly Irresistible" delivering improved productivity and profitability. Deborah is committed to food quality, safety and integrity and serves on the Council of Campden BRC, an authority in food and drink research and is also a member of The Food Ethics Council.

She is best known for her brave and pioneering approach to "Responsible Retailing". Deborah developed the first BUAV approved toiletries back in the late 80's. She introduced the first front of pack nutritional labelling and higher welfare standards for chicken, famously appearing with celebrity chefs Jamie Oliver and Hugh Fernley Whittingstall on the UK's Channel 4 TV. Deborah has developed long term sustainable trading relationships for key commodities in Africa, India and Central America, using scenario planning to develop long term thinking and "customer journey" techniques to deliver short term goals.

She is well practiced in all aspects of marketing communications including TV and a wealth of experience of business integration most recently with Somerfield. Deborah has a real understanding of customer responses to business change and how to manage these effectively.

9.15am – 9.40am Edward Garner, Communications Director, Kantar Worldpanel

Now that we have stopped panicking, is it business as usual?

2008 and 2009 saw unprecedented turbulence in grocery markets. There has been rampant food price inflation fuelled by world demand and supply shortages allied to weak Sterling.

Additionally, the world economy was hit by a deep recession which impacted shopping behaviour. Whilst non-food was particularly badly hit with many names disappearing from the High Street, grocery has not been immune.

Shoppers have been encouraged to trade down, both by retailers and news media with the result that 'Value' products, Private Labels and discounters were seeing renewed strength, particularly at the end of 2008. Willingness to pay the 'Organic Premium' suffered.

Now, however we see clear signs that "recession panic" is abating. Premium products are growing again, the market share of Discounters has stabilised or fallen and there is renewed interest in food quality and provenance topics such as Fair-Trade, Free-Range and "Local". A sense of proportion has returned.

9.40am – 10.05am Dr Gordon Campbell, CEO, SPAR International

Winning strategies for the new decade

The global recession has brought about a fundamental change in consumer behaviour. Consumers have traded down to lower priced products, purchasing more promotional items and buying more private label products.

In SPAR we responded swiftly to improve our value offer by strengthening promotions and lowering prices. SPAR private label ranges were expanded and discount ranges introduced. This has enabled SPAR to deliver value to the consumer, to remain highly competitive during the recession and to mitigate the effects of the recession for our customers. The results have been impressive. The overall worldwide sales of SPAR grew by 5.5% in 2009 to €28.5 billion. This was an excellent result in such a difficult economic environment.

The opportunities for SPAR in the new decade are clear.

- to focus our retail offer on the new value oriented consumer through pricing, promotion and private label strategies.
- to expand through acquisition and by entering new markets.
- to improve our cost base through improving the efficiency of our operations with the introduction of new technology at retail and distribution levels.

Perhaps the greatest opportunity is to strengthen our core retail values by improving our fresh offer and providing outstanding levels of customer service.

Taking all these factors into account SPAR International has identified 6 winning strategies for the New Decade. Dr. Gordon Campbell will address these winning strategies in his presentation.

10:05am – 10.35am Exhibition & networking break

10.35am – 11.00am Anthony Wysome, CEO, Waitrose Convenience

Doing good food in small spaces

In June 2010 Waitrose opened its first smaller format c-store store in Cambridge in the UK; food stores with sales areas ranging from 2,000-4,000 sq ft. Waitrose plan to open four initial trials of this new format this year, building upon the success of the impressive larger footprint 5-7,000 sq ft convenience shops the retailer has already opened in Nottingham, Bristol, London, Oxted, Ashbourne and Cheam.

In his presentation Anthony will explain how Waitrose have adapted their traditional strengths to this market and will share some early findings from the trials to date.



11.00am – 11.25am Nigel Mills, CEO, Mills Group UK

Meeting the changing needs of the UK convenience store shopper

The development of Mills group from 11 CTN stores located near Newcastle Upon Tyne in 1986, to 85 stores spread Nationwide, with over £80M in Retail Sales and £60M of Service revenue, is one of change and adaptation over 24 years. Mills currently operate four Convenience store formats ranging from 400sq ft – to 10,500sq ft in size which reflects the needs and demands of the modern convenience store shopper.

Winners of the Grocery Gold Award in 2008 for best Independent Company of the year, this is a story of survival and change during a time when convenience store retailing came of age in the United Kingdom.

11.25am – 11.55am Exhibition & networking break

11.55am – 12.20pm Don Longo, Editor-in-Chief, Convenience Store News

The post-recession U.S consumer and the new retail reality

The U.S. is slowly – very slowly – coming out of the Great Recession. Which changes in consumer spending will persist as the economy improves? And, how have these changing consumer habits affected the major retail channels? Who is winning and who's losing in the battle for retail supremacy in the U.S.?

This presentation will look at the new American consumer mindset and how consumers are spending their time (media, internet, social networking) and money.

Don will also review how these changes are affecting the major U.S retail channels of grocery, drug and convenience (with an emphasis on the c-store channel). And, finally, look at trends that will drive the future of the convenience industry.

12.20pm – 12.45pm The Henry Armour Interview

Insight Managing Director Dan Munford interviews Hank Armour, President & CEO of NACS, the Association for Convenience and Petroleum Retailing.

12.45pm – 2.15pm Exhibition & lunch break

2.15pm – 2.40 pm Tom Fender, Director, him!

Small supermarkets or big Convenience Stores: a new segment in UK grocery

Ever so quietly, a new segment of the grocery market has been formed – “small supermarkets”. Are they small big-stores? Or big small-stores? Or a hybrid of the two? One thing's for sure – they're competing for grocery spend from all angles. And Asda's acquisition of Netto has made the “small supermarket” arena all the more interesting. him! research & consulting has spoken to 4,000 small supermarket shoppers face-to-face at the moment of truth in 2009, and we're about to do it again in 2010 – extending the focus to independents too.



2.40pm – 3.05pm Mark Wohltmann, Client Director, USP Germany

Global recession survived, international regulation to come!

USP is the leading market research and consulting company specialising on the convenience and tobacco markets in the main German speaking countries. Currently it operates as a global competence centre for convenience and tobacco within The Nielsen Company.

Strategies to strengthen convenience retail businesses often focus on new store formats, additional services like postal or banking facilities, new target groups, or other ways of increasing footfall and consumer spend. Mark's presentation will instead focus on the challenge presented by the increasing vulnerability of core convenience product categories like tobacco, alcohol, sweets and fizzy drinks to a rising tide of international legislation, regulating nicotine, tar, alcohol, sugar and artificial additives.

His presentation will detail the lessons learnt internationally, in countries which have already found themselves more closely regulated. He will also evaluate what is likely to be coming down the road for tobacco and other categories and the longer term preparations that need to be made by the sector, in order to maintain growth and profits.

3.05pm – 3.35pm Exhibition & networking break

3.35pm – 4.00pm Joe Barrett, Director, Applegreen Ireland

Energising the Forecourt Industry

- Mount Merrion:
 - Overview
 - Building Design – environmentally friendly features
 - Building Design - consumer focused features
 - acafe - a new food offering for the forecourt industry
- Ireland's First Motorway Service Stations
 - Overview
 - Building Design - environmental friendly features
 - Building Design - consumer focused features
 - acafe/Burger King/Costa Coffee - range of food offerings

4.00 pm – 4.20pm International Convenience Retailer of the Year

Presentation from the winner of the Insight NACS International Convenience Retailer of the Year 2010.

The result of this competition will be announced on the evening of the 21st of September at our awards dinner. The following 6 retailers have been shortlisted by our international panel of judges. **In alphabetical order they are: 7-Eleven, Australia, Applegreen, Ireland, Pick n Pay/BP, South Africa, Rutter's Farm Stores, USA, TEMMA, REWE, Germany, Topaz/Centra, Ireland.**

The Judges were: Peter Kealy (SPAR Ireland), Jon Arnold (Waitrose Convenience UK), Simon Chinn (Verdict Research UK), Joe Bona (CBX USA), Sheryle Moon (AACs Australia), Ramon Kuipers (Imperial Tobacco Germany), Terry Byrne (BARO Lighting UK), Fiona Briggs (Editor of Global C-Store Focus), Don Longo (Editor CS News in USA) and Dan Munford (Managing Director, Insight Research UK).

4.20pm – 5.00pm Exhibition & networking

