



NAMA
Bringing convenience to life.™

OVERCOMING UNCERTAINTY TOGETHER

2020 Year-End Report

2020 BROUGHT UNEXPECTED CHALLENGES

and the need for turn-on-a-dime business planning
for the entire industry and NAMA.

Being a member of a trade association comes with many benefits. Access to key partners, suppliers and industry colleagues is beneficial for our businesses and their prosperity. But it's in the most difficult times, when we cannot run our businesses in the normal way, that association membership is most important.

Over the last year, NAMA and its members stepped up to meet the needs of the industry by amplifying our voice, advocating for protection and relief, and sharing critical resources, education and training to help us navigate rough waters.

I am particularly proud of NAMA's members, who shared ideas and solutions freely, contacted elected officials and provided a constant stream of feedback on their needs as the pandemic raged.

Looking back, the hurdles of the last year seemed daunting and insurmountable, but that is when NAMA proved to be more important to the industry than ever before.

Thank you for your continued partnership in bringing convenience to life.



Josh Rosenberg

Chair, NAMA Board of Directors

Director, USA Bottling

ACTION ON COVID-19

2020 was arguably one of the most disruptive years for the convenience services industry. The COVID-19 pandemic changed the way Americans worked, traveled and lived their day-to-day lives. In a year of uncertainty and no in-person events, NAMA's value proposition and resources in the areas of advocacy and education proved to be invaluable to the industry.

Working with federal and state officials, the association ensured that the industry could continue to safely serve workers and worksites deemed essential and keep their businesses running.

DEEMING THE INDUSTRY as Essential

At the onset of COVID-19, NAMA quickly mobilized, working with food and beverage industry partners to secure the designation of "Critical Infrastructure" from the Department of Homeland Security (DHS), allowing the industry to continue servicing open client locations throughout shutdowns.

Jobs saved

12,836

Total revenue saved

\$2.4 billion

Based on research by John Dunham & Associates
funded by the NAMA Foundation

“

NAMA has been an incredible asset for our business. From successfully ensuring that we could remain open during the shutdown, to promoting convenience services as a resource for re-opening safely, NAMA has acted as a voice for the industry when it needed it most. ”

Josh Wells
American Food & Vending

PROVIDING A VOICE

for Convenience Services

Through steadfast advocacy, amplifying the voice of convenience services in Washington and throughout the states, NAMA members engaged to ensure significant policy achievements on behalf of the industry during the pandemic.



Advocacy engagement
in all 50 states



Over 100+ advocacy letters
sent to regulators and
elected officials



2,779 emails sent
by 577 NAMA members, who used
NAMA's Action Center to engage
with elected officials

SECURING ACCESS

to Relief

As Congress and the Trump Administration worked to address the economic fallout caused by COVID-19, NAMA was out front, ensuring that federal relief reached the convenience services industry. The Coronavirus Aid, Relief, and Economic Security (CARES) Act provided \$2.2 trillion in economic stimulus and established the Paycheck Protection Program (PPP), Economic Injury Disaster Loans (EIDLs) and the Employee Retention Tax Credit (ERTC), saving small businesses with timely and needed assistance.

Through advocacy and education of all stakeholders, NAMA worked to ensure members had the tools needed to understand the assistance available to them. Over the course of 2020, NAMA was successful in expanding access to loan programs and securing tax benefits to ease financial stress caused by the pandemic.



SUPPLYING ESSENTIAL INFORMATION for the Industry

NAMA developed the following resources, keeping the industry well-informed.

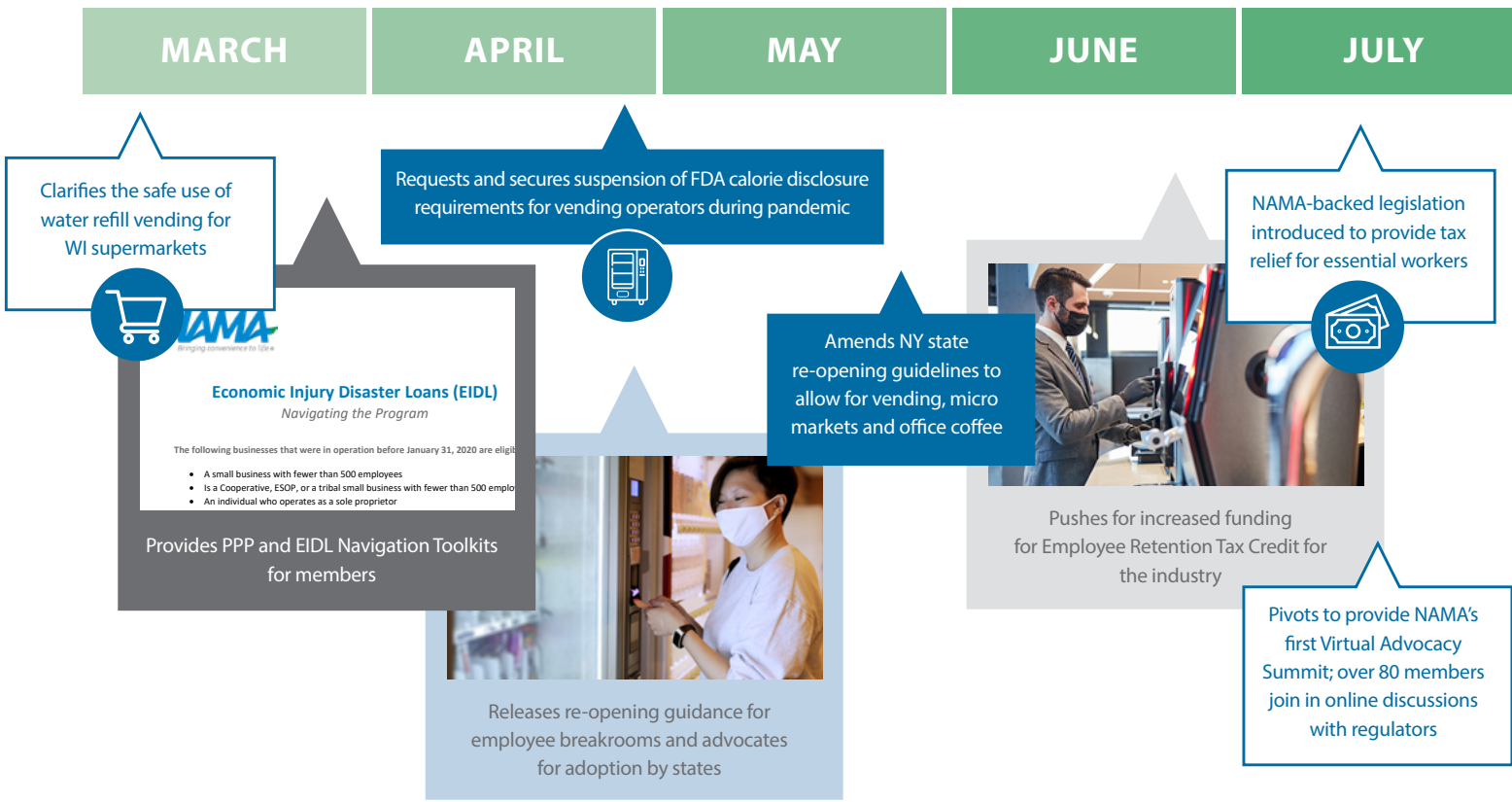
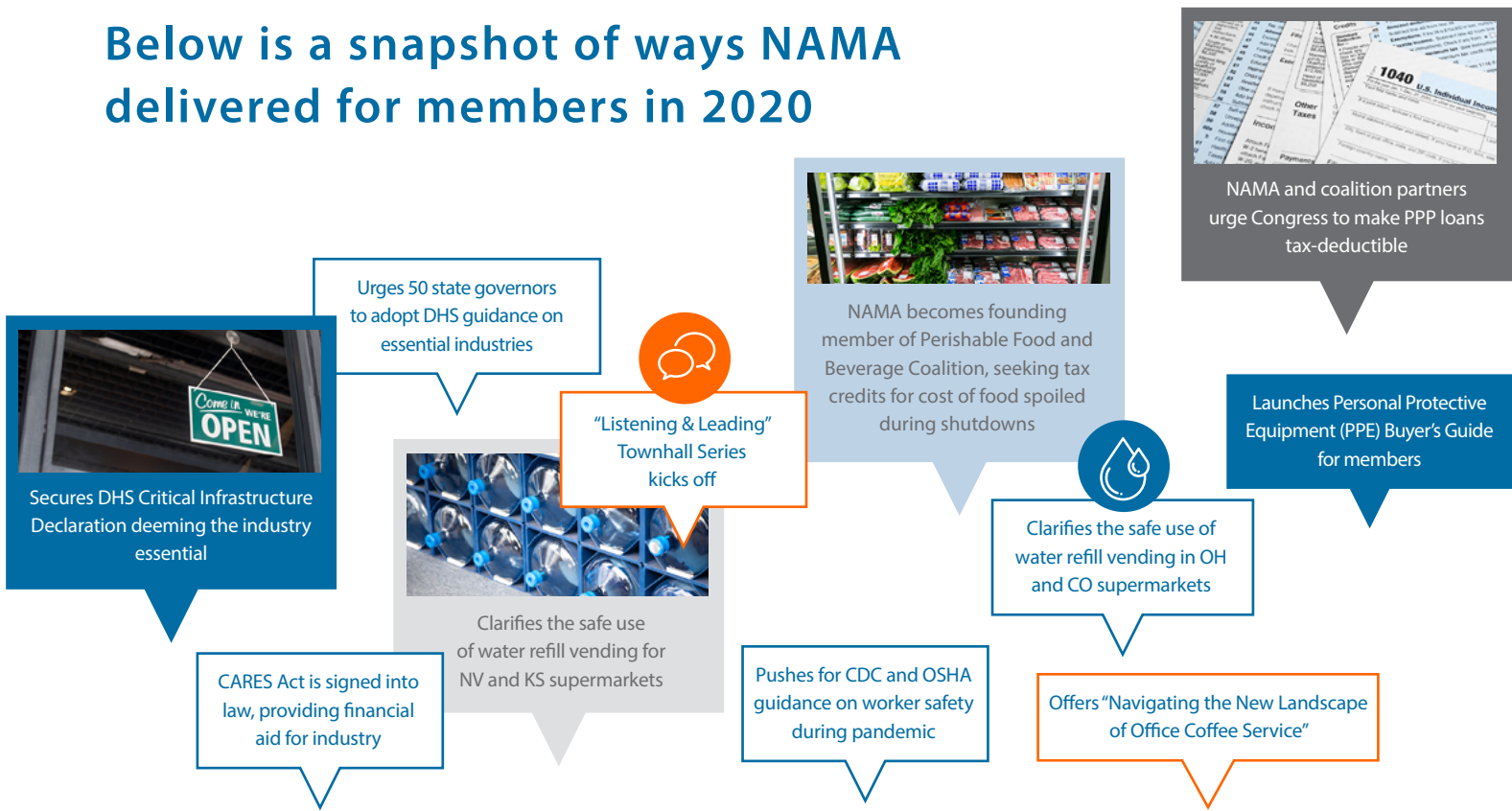


- **A COVID-19 webpage** with regularly updated critical information for businesses.
- **A tracking system for the latest state stay-at-home orders**, government assistance programs, reopening guidelines and vaccination information.
- **A Rapid Response Portal** fielding thousands of questions on the pandemic, government response and available assistance.
- **“Listening & Leading” Townhall Series**, providing 12 specialized webinars for members on key policy and business assistance developments.
- **The Government Affairs Weekly Wrap-up**, a newsletter recapping important policy and news developments each week.
- **Key guidelines for the industry**, including positive test protocols, federal and state financial aid guidance, sanitization and disinfection best practices, messaging for operators on the safety of the U.S. food supply, and vending and re-opening guidance for each member category.
- **A Personal Protective Equipment (PPE) Sourcing Guide** to help members source PPE, sanitizing products and other essential supplies.



NAMA IN ACTION

Below is a snapshot of ways NAMA delivered for members in 2020



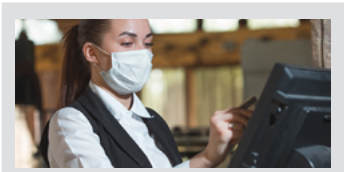


Provides sounding board and guidance for operators through Listening & Leading Townhall Series

Delivers thought leadership on best practices in the Fall Festival of Knowledge



Creates Sample Box campaign to deliver product samples directly to operators' doors



Sends letter to President-Elect Biden urging support of industries deemed essential during the pandemic



Clarifies the safe use of water refill vending in IN and OK supermarkets



U.S. Department of the Treasury announces simplification of loan process after advocacy from NAMA and other trades



Pushes Congress to allow second-draw PPP loans

Pushes for convenience services to be exempt from new COVID work requirements in MI

Offers "Decision-Maker Selling: Using Journey Research to Connect with New OCS Customers"



Amends NJ re-opening guidance to allow for vending in shopping malls

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

Pushes IL to open vending in museums under re-opening guidelines

Offers "Expanding Delivery Services with an Integrated eCommerce Platform"

Congress passes \$900 billion in additional stimulus, including **NAMA-backed second-draw PPP loans** and extension of the Employee Retention Tax Credit



Offers "The Essence of Coffee" (Module 1 in October and November, Module 2 in December)



NAMA and F&B Partners push for vaccine prioritization for essential workers

Offers "OCS Recovery: Putting Data into Action"



A Year of Value

CONNECTING FROM A DISTANCE

NAMA Sample Box

NAMA created a unique and impactful marketing campaign to connect operators and suppliers in this new business environment. The NAMA Sample Box delivered sought-after product samples to convenience services operators to taste and test drive.

In a year when face-to-face trade shows had to be canceled or postponed, this program delivered by combining multiple forms of digital marketing with a product sample box shipped directly to an operator's front door.

Sponsored Solutions Webcast Series

NAMA also worked to virtually reimagine the show booth, connecting operators to new products at a time when walking the show floor was not possible. Through NAMA's *Sponsored Solutions Webcast Series*, operators could view webcasts on hot trending topics and see product demonstrations by suppliers — all from their home or corporate offices. These innovative live broadcasts were also recorded and distributed across all of NAMA's delivery platforms.



Back By Popular Demand

NAMA continues to offer unique ways to get products into the hands of convenience services operators!

This multi-faceted campaign connects operators and suppliers with hands-on samples and product exposure. Gain valuable leads and get your product in the next box!

- Launch your product and increase brand awareness
- Generate leads among operators and the NAMA community
- Utilize digital and physical engagement platforms for maximum exposure and impact

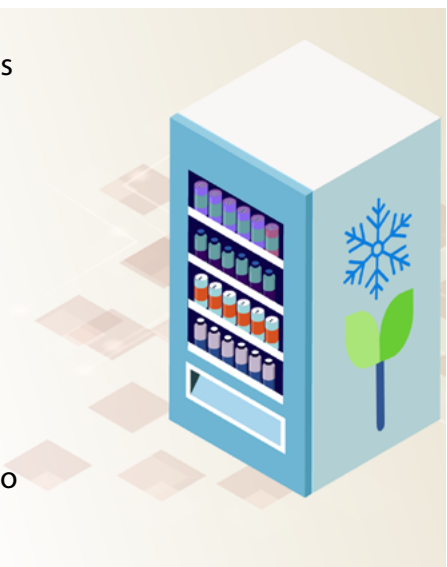


VICTORY ON REFRIGERANTS

After more than two years of research and advocacy, NAMA successfully updated national safety standards on vending machines refrigerated with advanced, environmentally friendly coolants.

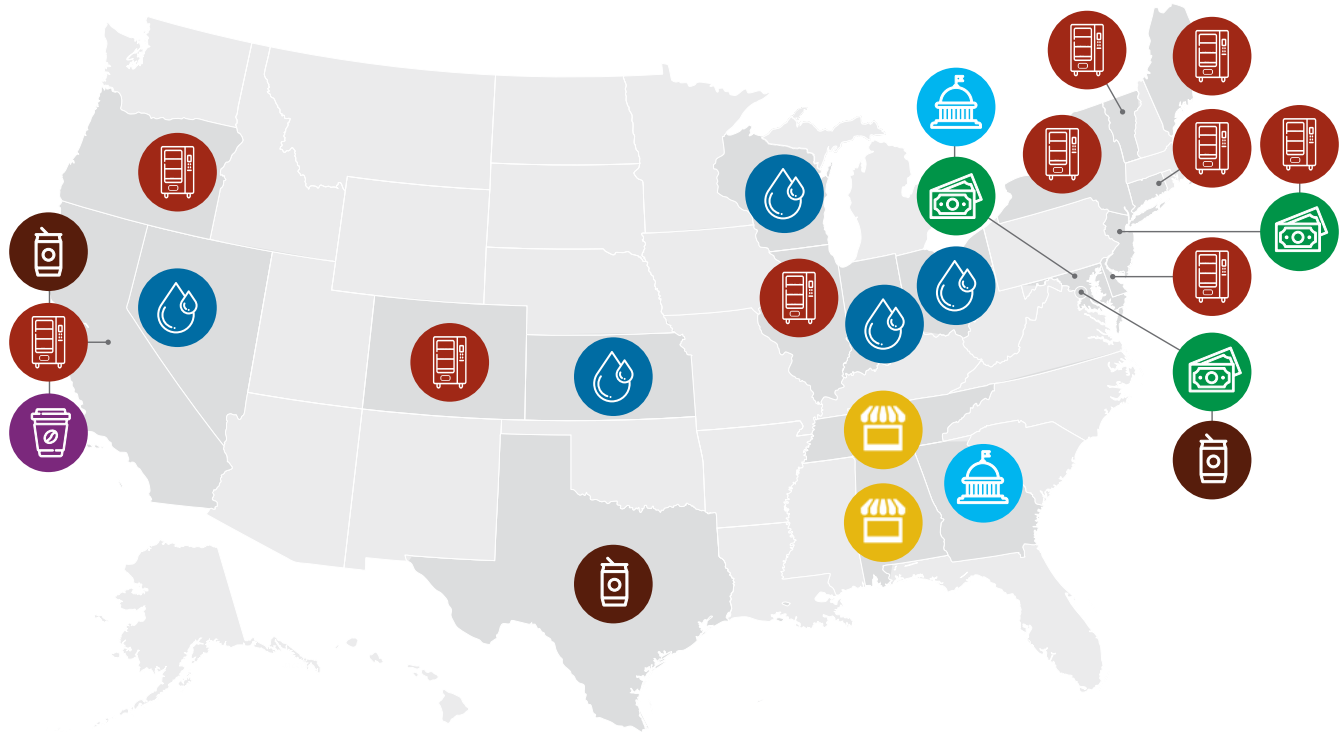
This major victory allows vending machines using next generation refrigeration to be sold and used, without placement restrictions in states that are banning the use of hydrofluorocarbons (HFCs).

To date, 16 states have acted on HFCs by passing new legislation or adopting new regulations under existing law. At the end of 2020, President Trump signed legislation initiating a national phaseout by 2035. NAMA's success in 2020 has made it possible for the industry to comply with the transition in an easy and efficient manner.



STATE-LEVEL SUCCESSES

Through it all, NAMA stayed focused. In addition to mitigating COVID-19 challenges, NAMA worked with state council leaders and provided advocacy for members in all 50 states — with great success.



Alabama ●

Secured passage of bill removing overly burdensome regulations on micro markets in state senate; bill expected to pass in 2021.

California ● ● ●

Clarified non-applicability of Prop 65 regulation to coffee. Blocked three sugar-sweetened beverage bills. Secured variances for placement restrictions on certain vending machines.

Colorado, Connecticut, Maine, Oregon, Vermont ●

Delayed R134a refrigerant ban in new vending machines until 2022.

Delaware ●

Finalized HFC regulations with NAMA-recommended language.

District of Columbia ● ●

Opposed sugar-sweetened beverage taxes. Testified on cash acceptance mandate leading to the exclusion of private establishments from final interpretation.

Georgia ●

Partnered with state council to host successful lobby day in February contacting hundreds of legislators.

Illinois ●

Amended museum reopening guidelines to allow vending.

Indiana, Kansas, Nevada, Ohio, Wisconsin ●

Reopened water refill machines that had been shut down by leveraging contacts with legislators' and governor's offices.

Maryland ● ●

Amended a cash acceptance mandate bill to exempt convenience services. Partnered with state council to host lobby day connecting with every legislative member.

New Jersey ● ●

Testified on cash acceptance mandate bill and successfully amended the legislation to protect the industry. Amended reopening guidelines to allow for vending machines to operate in shopping malls.

New York ●

Amended reopening guideline language that suggested closure of vending and coffee locations in auto dealerships, offices and commercial buildings. Delayed R134a refrigerant ban in new vending machines until 2022.

Tennessee ●

Secured passage of micro market tax definition bill in state house; bill expected to pass in 2021.

Texas ●

Secured micro market regulations aligned with FDA.

EDUCATING THROUGH UNCERTAINTY



2020 Education

57

Unique, online educational opportunities offered by NAMA*

1,245

Unique attendees

2,542

Total attendees

*The same number of education sessions held in 2019 at the NAMA Show, CTW and online combined

As the business environment shifted to remote, NAMA responded by creating new online educational offerings to meet the pressing needs of members.

Throughout the year, NAMA saw incredible ingenuity, collaboration and positive energy from the industry that fed into many of the sharing sessions and compounded learning.



Designed to connect members with NAMA so the true needs of operators could be understood and met.

The series provided operators with guidance on navigating the rapidly changing business environment and counsel on reopening — including checklists for liability and safety as well as diversity.

Despite the hurdles that came with 2020, *NAMA Listening & Leading* helped the industry to continue its innovation momentum. It gave technology providers the chance to share emerging touchless and cashless options and elevated thought leadership on expanding technology platforms, changing consumer trends and small business operating policies.

2 *Fall Festival of Knowledge*

A virtual education series featuring weekly webcasts focused on timely and innovative issues for convenience services.

The *Fall Festival of Knowledge* helped operators reevaluate policies and procedures to determine what was worth maintaining, adding or sunsetting — all designed to keep the industry ahead of the curve. Legacy in-person opportunities were adapted to fit the new virtual environment, including a virtual “hands-on” technician training that assisted mechanics in learning how to install telemetry equipment. *The Essence of Coffee* (Modules 1 and 2) were also conducted virtually, complete with a cupping experience.

NAMA’s *Fall Festival of Knowledge* helped the industry look to the future by showcasing thought leadership on the emerging customer service skills required in a post-pandemic workplace.

3 *Knowledge Center*

Integrated new subject matter to meet the needs of the industry.

In 2020, NAMA’s *Knowledge Center* provided essential education opportunities and expanded its offerings to include topics dedicated to specific COVID-19-related challenges.

From courses such as *The Essence of Coffee* to the online *Supervisory Management Program*, the *Knowledge Center* generated more enthusiasm and participation than ever before.

Additionally, a *Selling Convenience Services* program was launched, featuring industry leader Bob Tullio with insights on building a successful business from the ground up.



Knowledge Center registrants increased

22%

over 2019



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