

FDA Semi-Annual Conference 2017

Total Stores Completing Survey	
Answer Options	Response Count
	11
<i>answered question</i>	11
<i>skipped question</i>	0

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Please list your favorite speaker presentations		
Answer Options	Response Percent	Response Count
First	100.0%	8
Second	62.5%	5
Third	50.0%	4
Comments:	62.5%	5
<i>answered question</i>		8
<i>skipped question</i>		3

First

Doug Stepens why getting experience wrong
 Doug Stephens, Why Retail Is...
 Key Note Speaker was interesting. Forgotten his name.
 retail prophet
 Best Buy
 Doug Stephens
 Duncan Fulton
 CANADIAN TIRE

Comments:

All were excellent and informative
 Extensions/Evolution from what we heard in previous business summits.
 everyone else had the same message
 All speakers had value
 Good ideas but hard to implement in smaller platforms

Second

Willy Kruh online consumers
 KPMG, The Truth About Online Consumers
 Duncan Fulton
 Scott Adel
 LOWES

Third

Panel..future of retail disruption
 Best Buy, Bricks & Clicks
 bestbuy people
 BEST BUY

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Did you find the RCC STORE Conference provided value to your business?		
Answer Options	Response Percent	Response Count
Yes it provided a great deal of value	33.3%	3
Yes it provided some value	66.7%	6
No it id not provide any value	0.0%	0
Please explain why or why not:		5
	<i>answered question</i>	9
	<i>skipped question</i>	2

Please explain why or why not:

It was great to learn what other retailers are doing . Made you rethink some things you are doing . It was a valuable experience and you got informed on best practices etc.

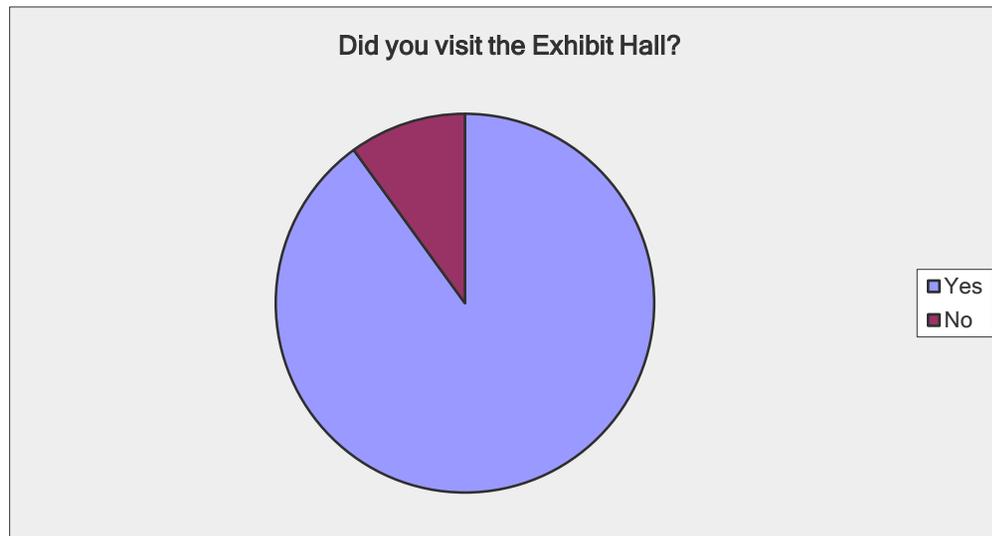
Some speakers were quite interesting. Midday speakers were not as compelling. Doug Stephens, who we hosted a previous FDFA event, stands out as a professional speaker and presenter. Speakers provided high level trends that require detailed analysis and creativity to apply to duty free as a distinct business. Key point to me was that duty free stores were designed for and appeal to baby boomers, their parents and grandparents in the 1980's to 2000; our stores are not ready for the rise of millennials as the most powerful economic group, or even to greatly entice baby boomers any more. Past duty free speakers such as Doug Stephens, McMillan Doolittle, Deloitte, One Red Kite, JC Williams and others were just as good and perhaps better in that they offered potentially more value because the presentations were custom tailored to areas of duty free need, and because some are leading consultants (MacMillan Doolittle works with NA's leading brands) who might help deal with specific duty free centric challenges. The RCC style speeches are relevant and interesting, but if we don't move beyond speeches to problem solving (answering key competitive questions for duty free) the speeches fall short of having a material impact. As an industry we need to evolve to identifying and trying to answer key duty free competitive questions such as: How do we make our assortment more relevant and effective (overall and by department)? How to we make duty free more experiential and engaging for millennials and others (i.e. duty free experience, not just supplier brand experience) in a way that is cost effective for our industry? What measurements/metrics will help properly measure key competitive aspects and progress towards achieving goals? etc. Otherwise we are just going around in circles and listening to the successes of other retail sectors, and we may just suffer a slow long-term decline as the world changes around us.

Found a lot of this applied to much bigger companies.

Good speakers in beginning and end; questionable in the middle.

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Did you visit the Exhibit Hall?		
Answer Options	Response Percent	Response Count
Yes	90.0%	9
No	10.0%	1
<i>answered question</i>		10
<i>skipped question</i>		1



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Were there any exhibitors, i.e. services or products, that were of great interest to your store, or, the duty free industry as a whole? If yes,

Answer Options	Response Count
	7
<i>answered question</i>	7
<i>skipped question</i>	4

Response Text

Pos systems Signage and display

Halo Metrics - Ability to map customer traffic flows into and through the store.

Nudge Rewards - Digital employee motivational and rewards tools.

JRoss Retail Recruiters - Perhaps a source for hiring a professional to support collaboration in buying or another area.

Not for a store my size.

cell phone tracking in store

POS presenters will assist us in our final decision for our new POS

LG electronics Halo Metrics Inpixon

Some value

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Do you think the FDFA should continue to offer duty free group registrations to the RCC STORE conference as a member benefit? i.e. for 2018

Answer Options	Response Percent	Response Count
Yes	60.0%	6
No	10.0%	1
Indifferent	30.0%	3
Comment:		7
<i>answered question</i>		10
<i>skipped question</i>		1

Comment:

I think the conference was a great experience and provided valuable insight. I would consider extending the semi so can attend both days . There appeared to be some good speakers on the 2nd day.

The RCC conference is good to attend periodically, but I'm not sure it provides enough value as an every year event. The exhibit hall was somewhat small and therefore limited in benefits, and the speakers covered many of the topics we have been hearing about for years. The FDFA really needs to determine the next steps for the semi-annual or summit, so it can advance the concept of professional development, through facilitation of collaborative initiatives within our sector. Otherwise, one good speaker a year would suffice to review retail trends in general. My view is that we should evolve to a Management by Objectives collaboration approach, where we identify a specific goals or questions that need thoughtful creative answers, and then try somehow as a group to develop a usable answer. Otherwise a single speech on retail trends is likely adequate at this stage (e.g. Doug Stephens or an executive(s) from a major duty free supplier(s)).

My main goal is to meet with my fellow Operators and discuss industry issues.

we need to be in Ottawa

I say yes, but it all depends where we are going with the semi-annual meeting. If we are going to do product selection (dragon's den style), I would say NO, we can not do everything at once

Not each year but every 2 or 3rd year might be a good cycle.

I think it depends on the speakers and the days the speakers are offered.

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Please rank your overall satisfaction with the presentations from 1 to 3, (3 being very satisfied, 1 being unsatisfied).

Answer Options	3/ Very Satisfied	2/ Satisfied	1/ Unsatisfied	Response Count
Financial Overview	7	4	0	11
Strategic Convention Proposal	9	2	0	11
Convention Multi-year Hotel Proposal	8	2	1	11
CBSA updates, presented by Darryl Larson	2	8	1	11
Government Relations Overview	6	5	0	11
Open Discussion on RCC Conference	3	7	1	11
Open Discussion on Suppliers; Liquor,	4	7	0	11
Comments:				2
<i>answered question</i>				11
<i>skipped question</i>				0

Comments:

- 1 Extremely pleased with the choice of hotel for the Toronto convention and the format of the agenda.

- 2 Convention presentation was good because 90% of the analysis was done well before the meeting and clear recommendations were given, and the recommendations were needed. However, the convention is an envelope in which good things can happen. Unless operators work well together to make best use of the new envelope, and commit to coming ready to do business in a creative and professional way, the new format will not address core challenges. CBSA presentation was largely devoid of substance. GR should just get on with it versus talking about what to do next. Reasonable and targeted Industry Stats and Tobacco Analytics Paper should be done by now, are not that complicated, and should be completed outside the meeting as with the convention with more clear outcomes and goals presented at the meetings. Meeting are not the place to do preliminary discussions, but should be a place to review well analyzed and semi-complete projects. Talk of suing the government due to a future tobacco decision are a complete waste of time; not positive or working to a strategic outcome. RCC conference discussions were ok, but unless they take us somewhere collaboratively or even individually that is clearly visible, the benefit will always be limited. FDFA is not supposed to take on retail commercial projects, but there must be a way for the FDFA to better facilitate and promote collaboration. Open discussion as well was ok but it seems to degenerate to going around in circles because their seems no clear goal, direction, problem or question being answered. Multi-year hotel needs analysis seemed to be thorough and well done.

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Given that the multi-year convention proposal was adopted, please let us know what aspects of the new program you are most looking forward to by ranking the following:

Answer Options	3/Very Satisfied	2/ Satisfied	1/ Unsatisfied	Response Count
1) Supplier Category Schedule (i.e. Liquor 2 days)	6	5	0	11
2) Opening Sunday Night Dinner	8	3	0	11
3) Supplier Group Presentations (i.e. Diageo &	9	2	0	11
4) Monday Evening Gala (vs. previous Wednesday	8	3	0	11
5) Multiple Hospitality Lounge networking events	8	3	0	11
<i>answered question</i>				11

Question Please tell us why?

1	<p>Beneficial time usage of supplier time. Same message to all. Ability to learn from comments expressed in group setting</p> <p>Better focus for meaningful group strategic presentations and discussions. More professional and cohesive meetings by working as a group. Opportunity to show suppliers we are cohesive, serious and progressive.</p> <p>Gives me an opportunity to hopefully meet with Principals in companies I may not otherwise get the chance to.</p> <p>Not sure if two days given the new format will be enough time to meet all suppliers.</p> <p>Every store has to be able to meet all the companies they need to see.</p>
2	<p>Allow more interaction with suppliers and operators instead of groups going off on own</p> <p>I think this will be a nice change from the opening cocktail - I just hope that no big suppliers are left out</p> <p>Better attendance, supports ability to reduce cost by shorter attendance for some supplier categories. very interesting</p>
3	<p>Allows more open dialogue and shared ideas</p> <p>Again I just hope that all big suppliers were approached and they all have the same opportunity to present other than the big 3</p> <p>Need ability to step back and talk about strategic actions versus just new product introductions and price.</p> <p>least time wasted for the suppliers, they can bring the company decision makers for a short period of time, which is more feasible.</p>
4	<p>More participation. Allows suppliers who can't leave early wed.</p> <p>More buyers and suppliers are likely to attend.</p> <p>It was nice to have the gala on the final night however this will be a nice change and potentially bring more people to the dinner</p> <p>Great idea. More can attend, but not have to stay for whole convention.</p> <p>great timing, everybody should be there.</p>
5	<p>Allows for more networking in a fun setting</p> <p>A lot of operators/suppliers like to have a place to go after dinner and it's great that it will be organized where everyone can meet up together</p> <p>Good idea to make venues quieter to facilitate better networking and casual discussions.</p> <p>If we don't have the hospitality lounge, we all stick at the hotel bar, might as well be within ourselves.</p>

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Do you have any concerns with the new convention program?	
Answer Options	Response Count
	8
<i>answered question</i>	8
<i>skipped question</i>	3

Response Text

Excellent changes that should satisfy suppliers and operators . Will give value and great experience in attending
None

My only concern is that since we will be having these group presentations, it will cut down on individual meetings available. I understand that suppliers will likely accommodate the bigger stores but would like to make sure that we all have an equal opportunity to meet with the suppliers and that our meeting time (big or small) won't be cut short because of the new format.

Only area not specifically addressed - liquor boards are our biggest suppliers in one sense. National discussions about common problems and challenges, and desired opportunities, goals and precedents would make sense. This is not part of GR. It should perhaps be incorporated as a working session in our operators meeting. The industry should always have deliberate and coordinated plans on how to deal with competitive challenges and restrictions across the whole country, that should be prioritized and addressed.

the increased cost of western stores to get people there and products back, while eastern store can drive. time allocated to small stores from suppliers
Sufficient time to fit in all the suppliers we need to see.

It is always difficult to start a new concept. People are reluctant to changes. But I think we are going the right way
Cross fingers that it works

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How many operator/buyers do you think you will bring to the 2018 convention at the King Edward in Toronto?

Answer Options	Response Count
	9
<i>answered question</i>	9
<i>skipped question</i>	2

Response Text

At least 1 will attend possibly 2

5
5

Unknown. Core categories are dealt with by those who usually attend. Perhaps some open discussion is needed with members on what approach to attendance will be most beneficial to achieve the goals of the new format.

2. Since Tracie can only be there for 3 nights/2 days, I think I will be bringing her to help this year. Doesn't have to be there for the "full pull".

4
4
4