



GLORY

C-Store Transformation

**HOW C-STORES
CAN TAKE CENTRE STAGE**



A **growth** industry

After years of decline, shopping locally is on the rise again.

The reasons are multitude: speed of access for an increasingly “time poor” population, the desire for community, consciousness of environmental impact, and of course, the pandemic, which not only forced us to stay local for long periods during lockdowns, but has also resulted in many people continuing to work from home and being more dependent on local resources.

For many, shopping locally means using a convenience store (C-Store).

THE GLOBAL C-STORE MARKET SIZE WAS VALUED AT USD 2.12 TRILLION IN 2021 AND IS EXPECTED TO GROW AT A COMPOUND ANNUAL GROWTH RATE (CAGR) OF 5.6% FROM 2022 TO 2028

The question is, how can convenience retailers continue to capitalise on the changes that we have gone through?

“There is a key opportunity for stores that develop their role as destinations for local community needs going forward.”

Simon Wainwright, IDG



5.6%

Estimated CAGR of the global convenience market from 2022-2028

Source: Grand View Research

The store means more



Today's convenience store has the opportunity to be much more than just a place to find everyday essentials.

They can become community hubs, offering a range of valuable services for their neighbourhood, and building strong loyalty among local residents.

These are just a few of the services we are seeing convenience stores invest in today:

- **PROVIDING ACCESS TO CASH FOR THE COMMUNITY**
- **SHOWCASING LOCALLY SOURCED PRODUCTS**
- **PROVIDING FRESH FOOD AND COFFEE**
- **BECOMING A HUB FOR PARCEL DELIVERY AND RETURNS**
- **OFFERING DELIVERY SERVICES THROUGH THIRD-PARTY COMPANIES FOR ULTIMATE CONVENIENCE**
- **OFFERING BILL PAYMENT SERVICES**
- **INSTALLING 24-HOUR LAUNDROMAT KIOSKS OUTSIDE OF THE STORES**

Some of these services may bring little direct profit to the business, but they do bring people through the door and make the stores an invaluable asset to their community.

As consumers focus more on shopping locally, independent and smaller retailers have a chance to win the hearts and minds of their communities.

Ultimately, while extra services like those above are extremely valuable, the only way to truly win hearts is through an exceptional customer experience.

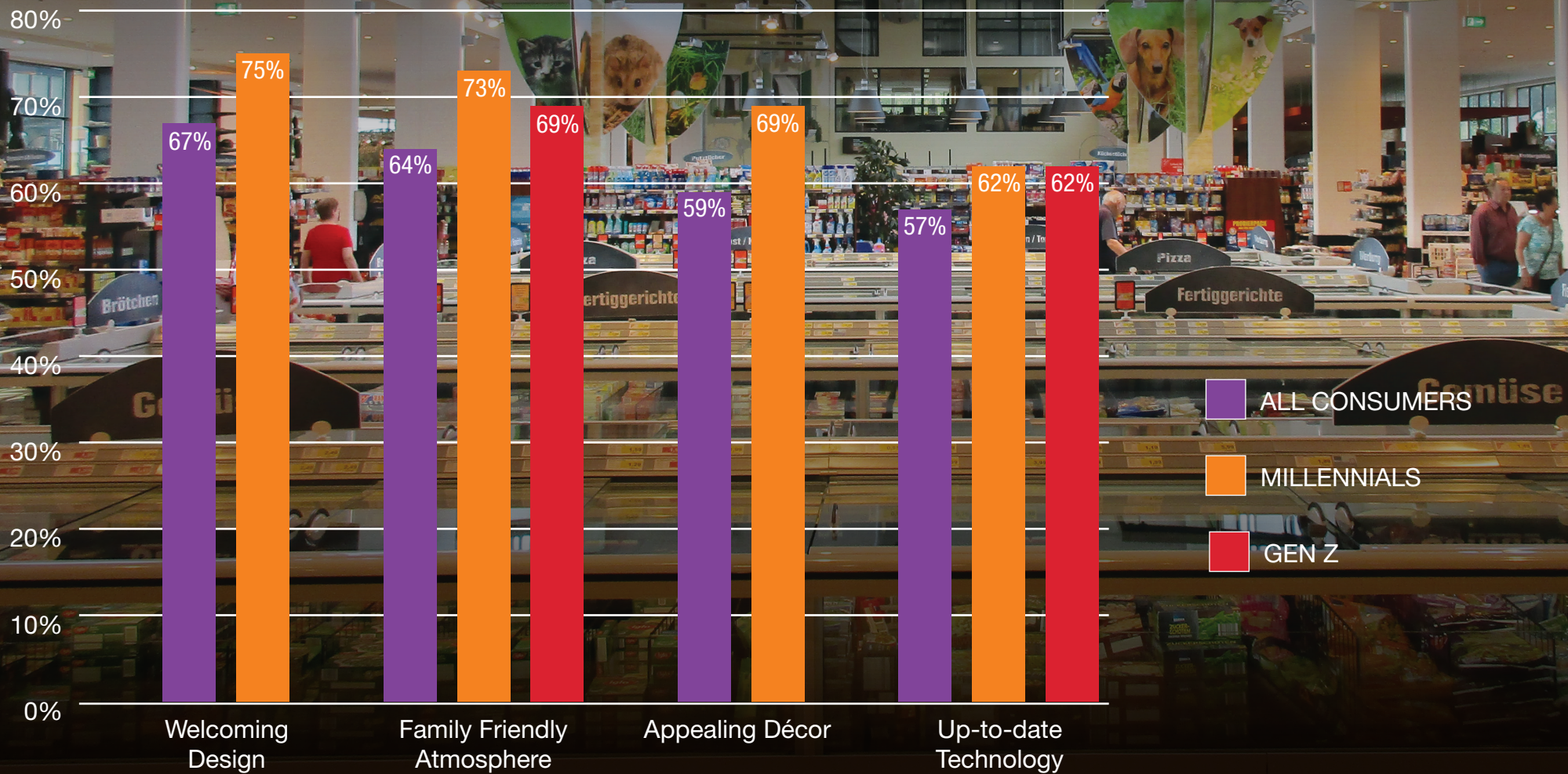


70%

of people

in the UK told YouGov they intended to continue shopping more locally

What attracts consumers to C-stores?



Experiences that match expectations



For retailers to become an essential part of their community they need an experience that meets their customers' expectations.

To achieve this, many retailers focus on making the experience memorable. But for convenience stores, with space at a premium, this is a challenge. What the experience should be for consumers in the convenience store is easy, comfortable, convenient.

This means creating an inviting, pleasant atmosphere, with appropriate technology that benefits and smooths the customer journey (more on this later).

A C-STORE DESIGN REPORT FROM TECHNOMIC & CHUTE GERDEMAN STATED THAT A WELCOMING, COMFORTABLE STORE DESIGN WAS IMPORTANT TO 67% OF ALL CONSUMERS, WITH 75% OF MILLENNIALS STATING THAT IT WAS IMPORTANT TO THEM. IT ALSO REVEALED THAT UP-TO-DATE TECHNOLOGY WAS IMPORTANT 57% OF CONSUMERS, RISING TO 62% FOR MILLENNIALS AND GEN Z.

While all of these aspects are clearly important, every retailer knows it's ultimately customer service that wins the day.

But what if you just don't have the staff?

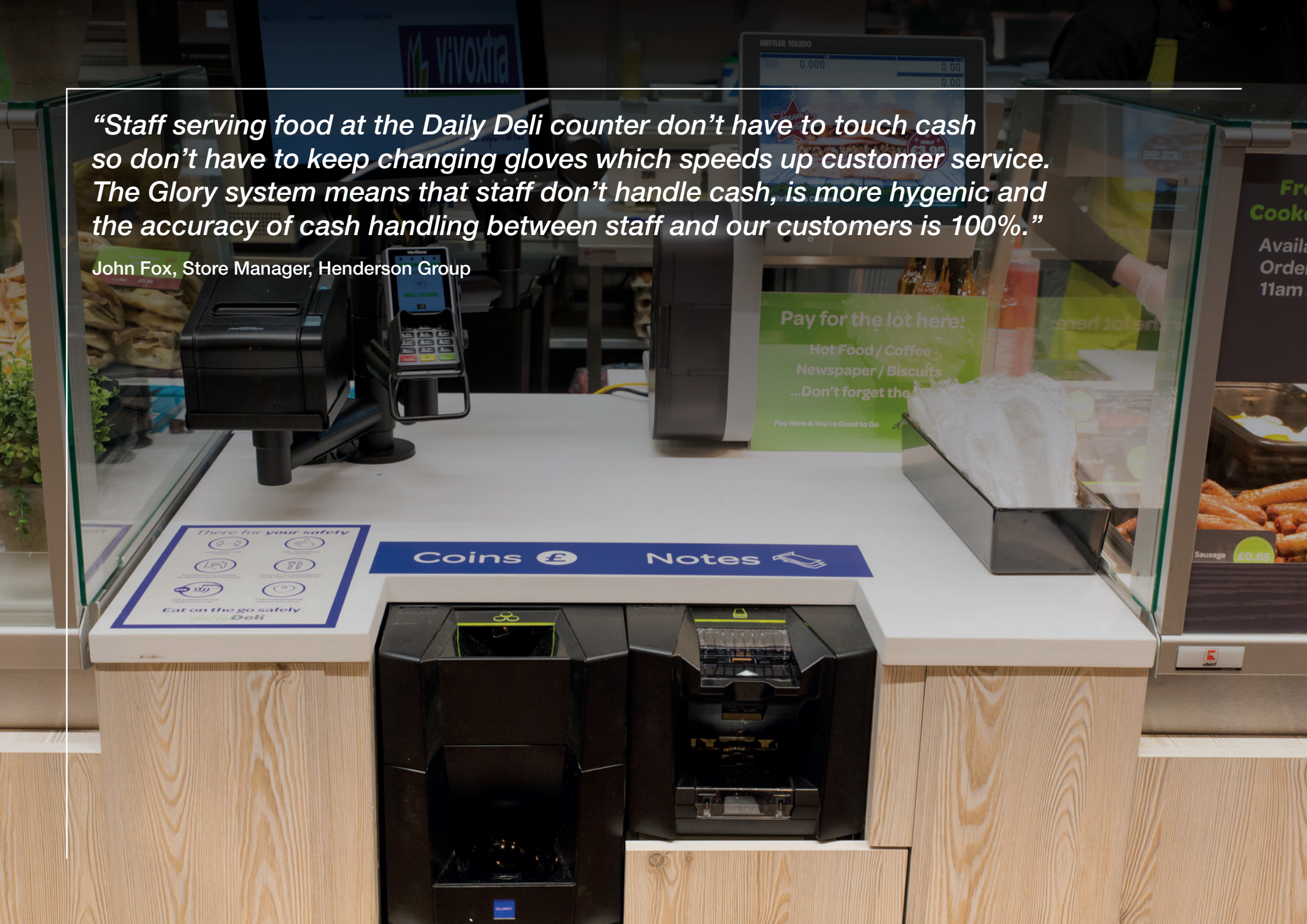


“You’ve got to start with the customer experience and work back towards the technology, not the other way around.”

Steve Jobs, Former Apple CEO

“Staff serving food at the Daily Deli counter don’t have to touch cash so don’t have to keep changing gloves which speeds up customer service. The Glory system means that staff don’t handle cash, is more hygienic and the accuracy of cash handling between staff and our customers is 100%.”

John Fox, Store Manager, Henderson Group



Can't get **the staff**?



Creating a great experience means having enough staff on hand to serve your customers effectively. But with a far-reaching labour shortage, many C-stores are struggling to meet that demand.

When you can't get enough staff to deliver the kind of service you want, you have two options: automate some of your processes, or degrade your service offering.

One of the most powerful benefits of cash automation is that, in relieving the pressure of manual cash handling from your staff, you free them up to be more attentive to your customers and better maintain the store environment. This allows you retain the same level of service in your store and deliver the experience you want for your customers, even when labour is short.

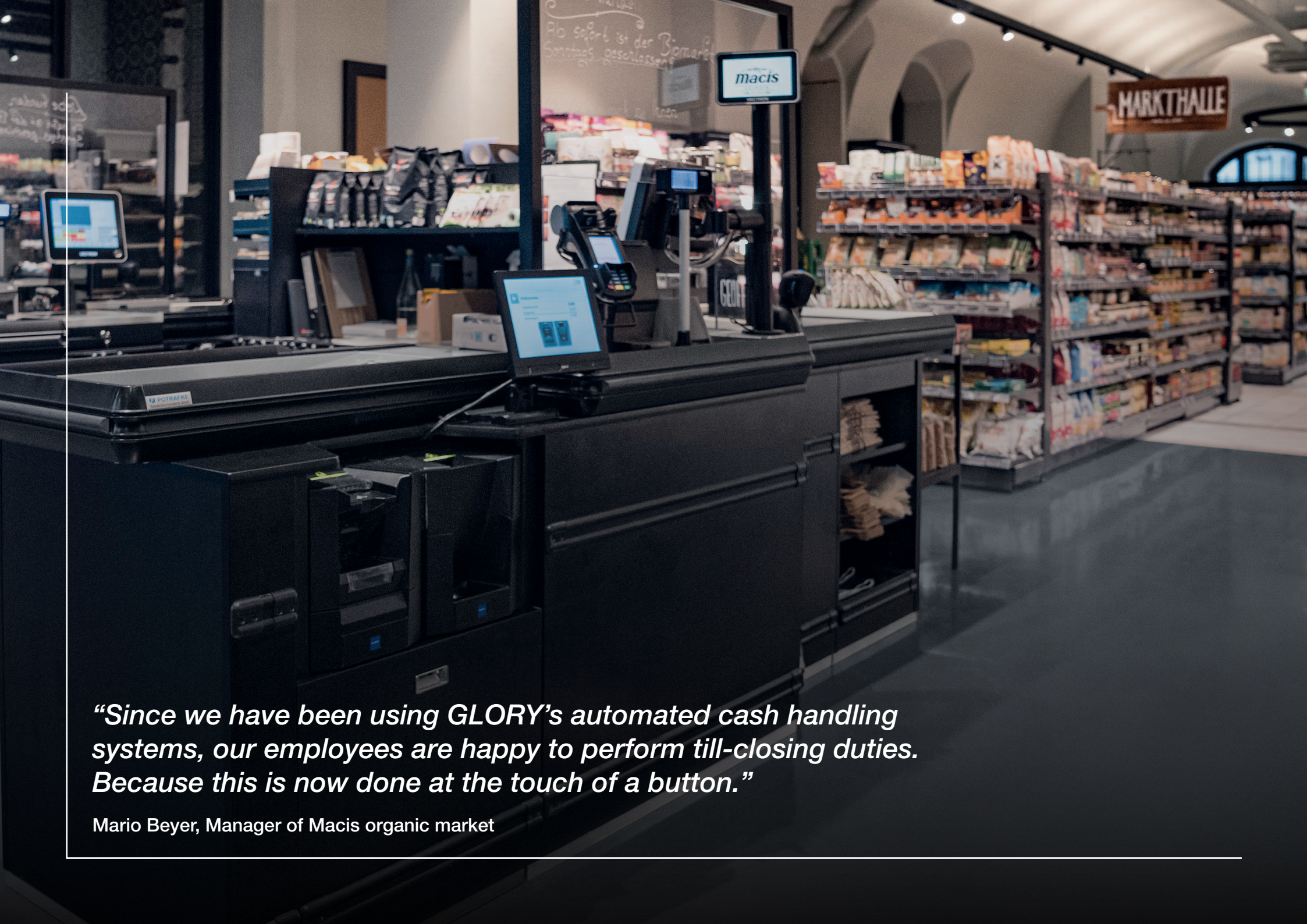
NOT ONLY DO THESE SOLUTIONS SPEED UP THE CHECKOUT PROCESS, BUT THEY CAN SAVE HOURS OF TIME AT START-AND END-OF-DAY RECONCILIATION, SHIFT CHANGES, CHANGE REFILL, AND PREPARING BANK DEPOSITS.

Automation also means less training, and getting your workers up to scratch quicker, which is incredibly valuable in an industry with a typically high staff turnover rate.

Of course, when it comes to the in-store experience, there are parts of it that you want to be memorable; other parts should be so easy and frictionless that they are not remembered at all.

There is one key moment in the journey that should be easy to forget. Paying.





“Since we have been using GLORY’s automated cash handling systems, our employees are happy to perform till-closing duties. Because this is now done at the touch of a button.”

Mario Beyer, Manager of Macis organic market

Payment opportunities



The payment for goods should be the least memorable part of any shopping experience.

How many times has someone walked off thinking, *“that was an amazing experience handing over all that money”*?

We want people to remember the friendly service, the well-stocked and clean store environment, the satisfied feeling of getting what they came in for. Payment on the other hand should be swift, easy and forgettable.

THE OPTION OF PAYING IN CASH IS IMPORTANT TO CONSUMERS. FOR MANY, IT IS ESSENTIAL.

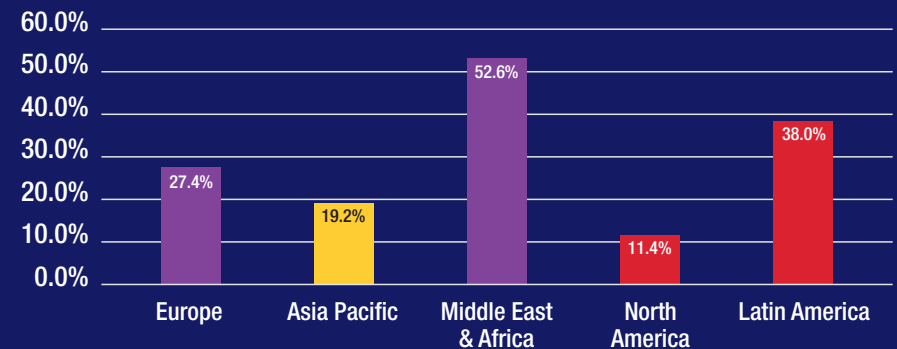
Globally, cash is still one of the most popular methods of payment, especially for smaller value sales, which is the bread and butter of C-Stores.

Accepting cash can help retailers to reduce costs and protect them against increasing card charges, but manual cash handling does come with its own costs and labour commitment.

Through a wide range of automation solutions from back office to point-of-sale, Glory can help to dramatically reduce the cost of handling cash in the store – providing payment choice for customers, cutting your costs, and freeing up your staff to focus on customers.

Cash automation is also a powerful tool for reducing errors and shrinkage.

Cash as a % of all POS Payments

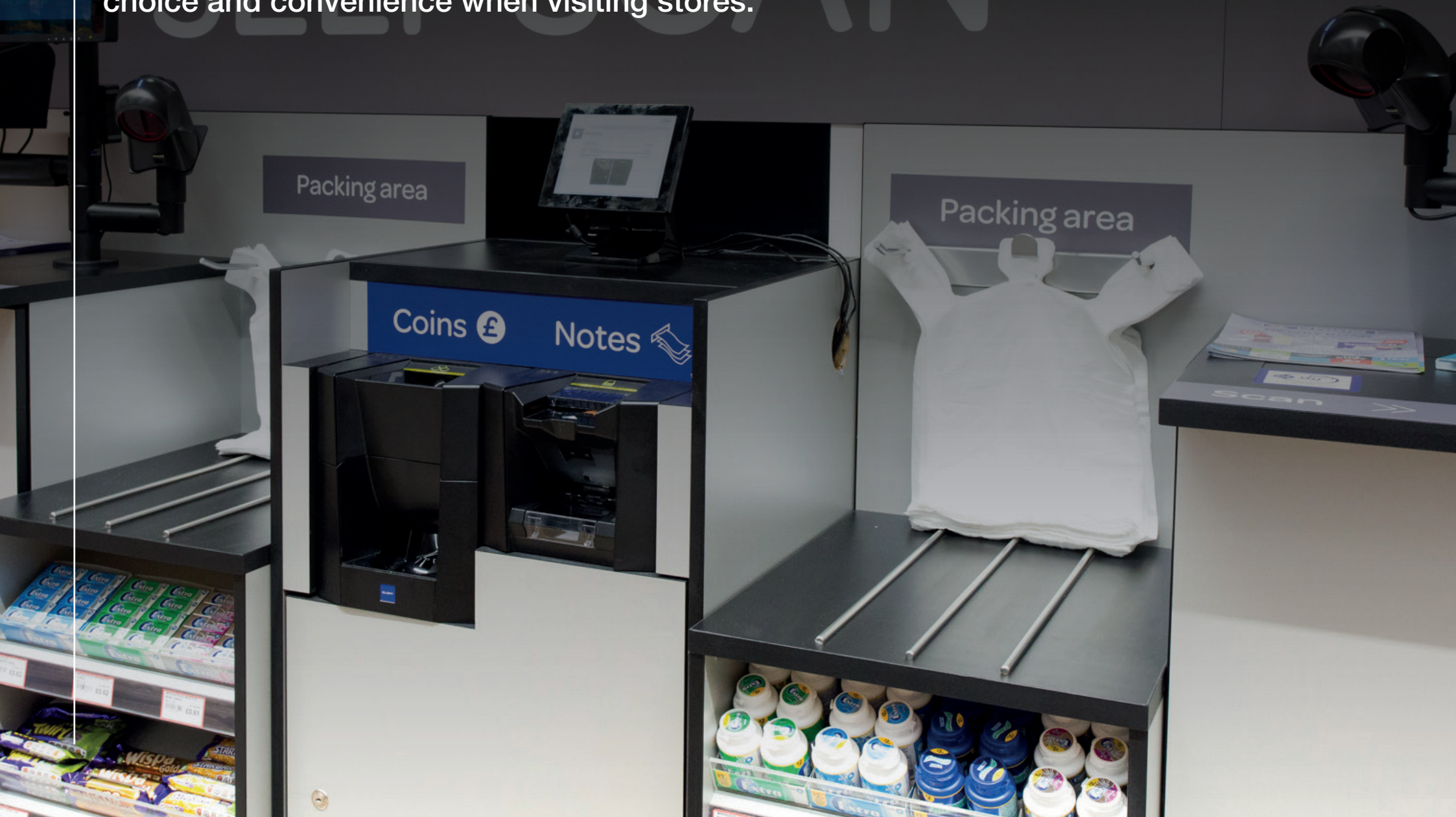


Source 2021 Global Payments Report, WoldPay

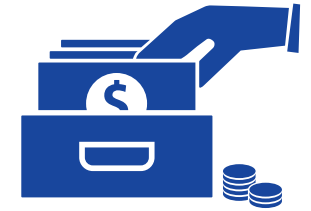
“Cash is essential for the inclusion of socially vulnerable citizens, such as the elderly or lower-income groups.”

European Central Bank

For one Glory customer, 30% of self-checkout customers are using cash at terminals which has given customers the added choice and convenience when visiting stores.



Preventing shrinkage in the retail environment



As much as we want to eliminate shrinkage in the retail store, it persists.

Internal theft is a problem few retailers manage to avoid. But the negative impact of cash shrinkage goes beyond the money lost. No business wants to foster an atmosphere of suspicion and micromanagement, ultimately leading to poor staff relations and higher staff turnover.

GLORY'S CASH RECYCLING SOLUTIONS DON'T ACT AS SURVEILLANCE ON YOUR EMPLOYEES – THEY REMOVE THE TEMPTATION OF THEFT ALTOGETHER.

POS and back-office cash automation together create a “closed loop”, where staff no longer need to have contact with cash as it moves through your business.

Counterfeits are another part of the shrinkage problem that retailers face. Identifying counterfeit notes is difficult and time consuming. Removing the task of identifying these notes through automation can have a significant impact on staff productivity and job satisfaction.

And on top of all that, cashier errors are virtually eliminated.

Minimising shrinkage is essential to a sustainable business model. But there's another kind of sustainability that cash automation can bring...

Instant Karma Retail eliminated cash shrinkage and counterfeit note acceptance by deploying Glory cash recyclers.



\$61 Billion

Estimated cost of
retail shrinkage in 2019 Source NRF

Making convenience sustainable



The cash cycle is wildly inefficient in terms of its carbon footprint. But it doesn't have to be.

Transport is the area of the cash cycle that has the largest environmental impact. The main emitter in the cash cycle is fossil fuel consumption by CIT (cash-in-transit) vehicles – armoured trucks that move the cash between ATMs, retailers, banks and cash distribution centres (44%). The manufacture of CIT vehicles is also significant (8%). They are used solely for the cash payment system, making them some of the least energy efficient vehicles on the road.

WITH GLORY CASH RECYCLING TECHNOLOGY, YOU CAN ACTUALLY REDUCE YOUR CARBON FOOTPRINT.

By streamlining your cash processes and recycling cash within your business, you can reduce the number of times that CIT vehicles pick up cash by up to 50%. Cash staying securely in the store and not travelling as much can make a real difference on your stores' environmental impact, and allows you to demonstrate your shared values with your community.

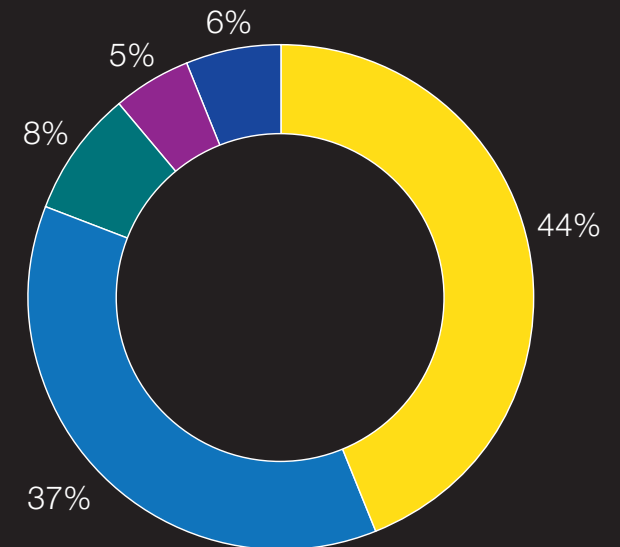
The need to cut carbon is clear to us all, but we also understand the pressures on profitability when people depend on your business for their living. Too often, sustainability and profitability can be at odds, creating difficult decisions for business owners.

This is not a difficult decision. Cash automation can deliver on both goals: profitability and sustainability.

“Why are you doing this? How are you making a difference? What is your reason for being, besides making money? There is no engine or vehicle like business to make a difference.”

Walter Robb, Co-CEO, Whole Foods

Total Carbon Emissions Share



- Trucks: Use of Fossil Fuels
- ATM: Energy Consumption
- Trucks: Armoured Steel
- Coin Production: Copper
- Other

Source: Nederlandsche Bank & Reconnaissance Int. Ltd.

GLORY can help



Glory works with retailers of all sizes to improve their cash handling processes.

We have helped retailers in all segments to deliver world-class customer experiences – the bedrock of any successful business – by giving their staff more time to spend with customers and maintain the store environment.

Of course, part of a good customer experience for a significant portion of the population is the ability to pay in cash when needed. We help you continue serving customers who prefer cash in a more efficient and cost-effective way for your business, while also eliminating the pressures on your margins caused by errors and shrinkage.

Customers have also become more conscious of the choices they make. They want to know that the businesses they give their money to are committed to a more sustainable future. Amongst the range of options available to you to in becoming a more environmentally friendly business, cash automation is one that actually helps you to reduce costs and increase profitability at the same time.

Convenience stores are in a prime position to capitalise on the shift towards shopping locally, but to achieve this, the customer experience must come first.

GET IN TOUCH WITH GLORY TO DISCUSS HOW OUR SOLUTIONS CAN HELP DELIVER PROFITABILITY, SUSTAINABILITY, AND AN EXCEPTIONAL CUSTOMER EXPERIENCE IN YOUR STORES.

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