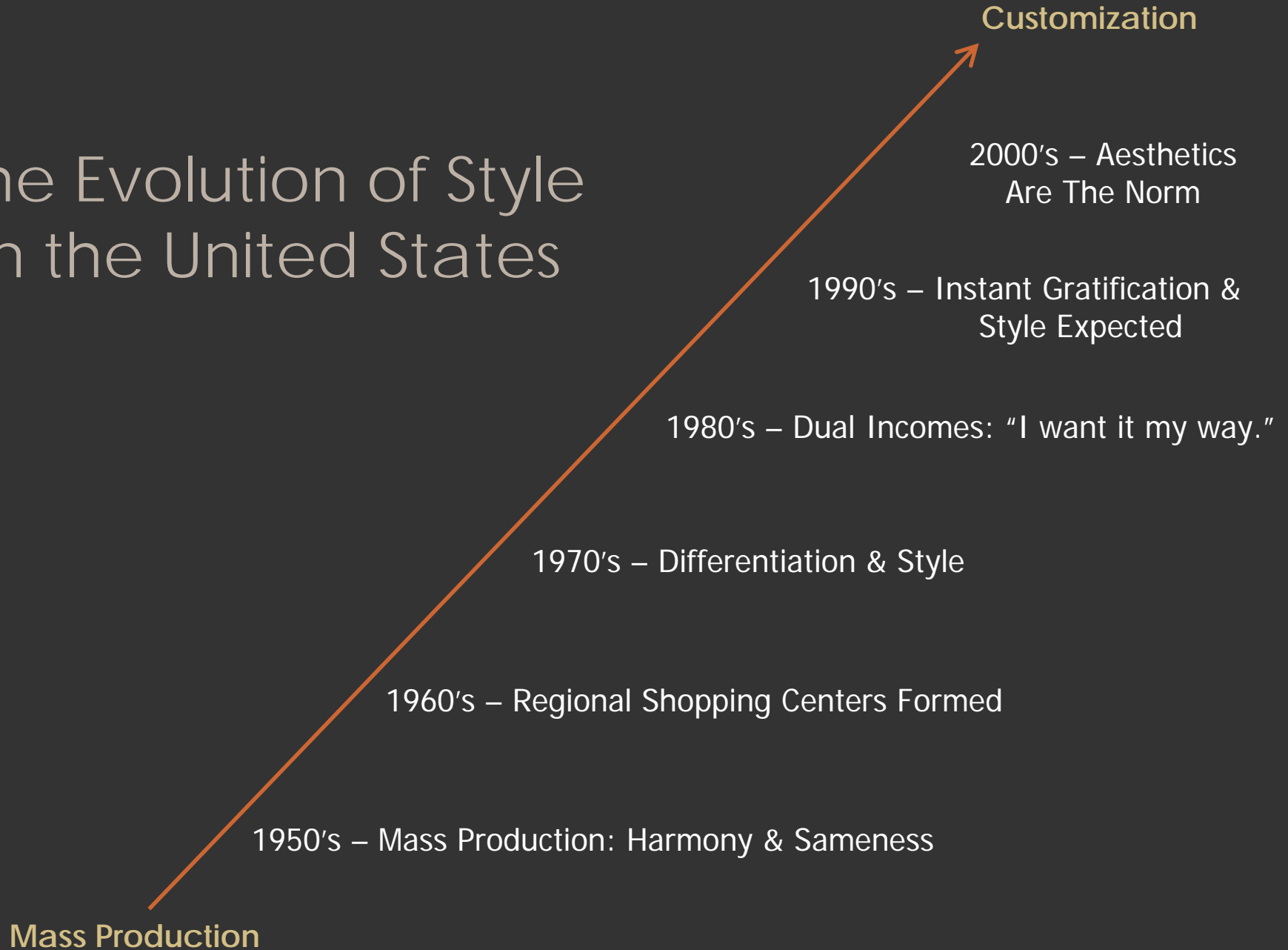


The New Face of Global Hospitality



Bob Puccini, CEO
The Puccini Group

The Evolution of Style in the United States



The Evolution of Style in Emerging Economies

The more demand for good style and design products the more:

- Technology ↑
- Available Substitutes ↑
- Percentage of Income ↓
- Price ↓
- Ease of Acquisition ↑

2008:
Instant
Gratification
and Style
Expected

2000's – More
Accessible Goods
for All

1970's 1980's:
Production for
the Few

Creating Desire and Differentiation in a World With Infinite Options

Designing is the process of linking need with desire.

Desirability is value by another name. A more inspiring and emotional name for value. Would you rather be thought of as valuable or desirable?

We're in the business of creating desirability via innovation.

Cultural Influences on Style

MEDIA

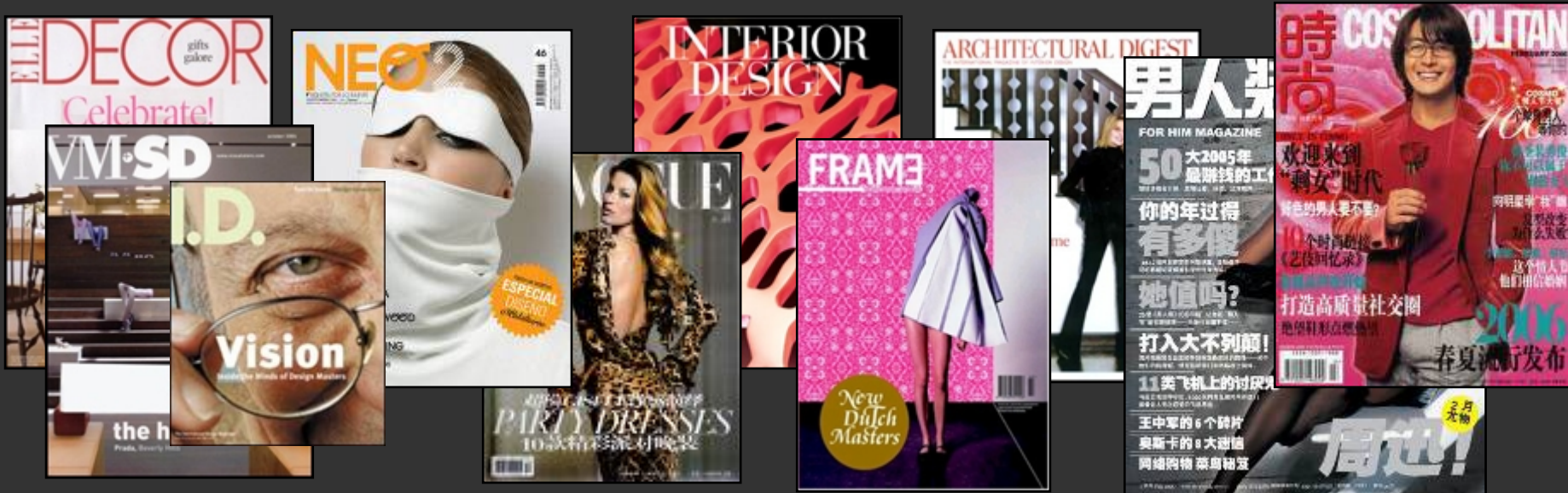
- Style television
- Interior design magazines
- Movies
- World Wide Web

TRAVEL & IMMIGRATION

- Globalization
- Aesthetic elements transition from culture to culture

FEMINISM

- Women with independent incomes are freer to spend money on aesthetic goods
- More women business travelers
- Women make most spending decisions



Demand for Style is an International Phenomenon

CHINA: Consumer income spent on food and electronics has nearly doubled between 2003 & 2007. The number of internet users has nearly tripled.

INDIA: India's individual purchasing power will climb from \$2,149 per person in 1999 to \$5,653 per person in 2020 — and to \$16,500 in 2040

WORLDWIDE: Since 1995, more than 55 design and architecture magazines have begun publishing.

Western Thoughts of Emerging Markets



Bangkok Airport Food Service



Amsterdam Airport



Stockholm Shopping Mall



South African Restaurant Design



Hotel 3-Meal in Slovenia



Kitchen Hoods in Spain



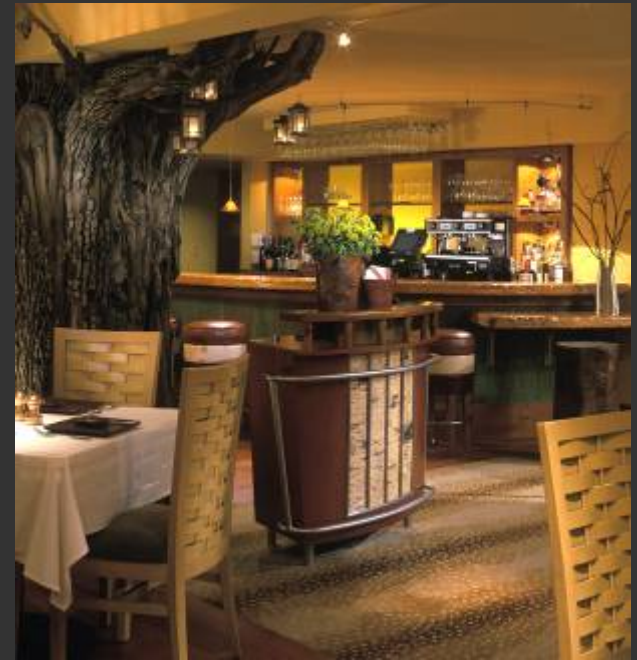
The skyline is changing, and not just in the world's major cities...



Restaurants in the finest hotels throughout the world reflect an international design standard. They adhere to the rules of global style while infusing a native flavor into their aesthetic.



Silverleaf Tavern, 70 Park Avenue Hotel, New York City



Firefly, Hotel Madera, Washington DC



Urbana, Palomar Hotel, Washington DC



J Six, Hotel Solamar, San Diego

Restaurants have become
the **jewelry** of fine hotels.



Grand Café, Hotel Monaco, San Francisco



Domaso, Waterview Hotel, Alexandria,
VA



Silverleaf Tavern, 70 Park Avenue
Hotel, New York City

Designing for a Global Traveler

- Today's business travelers expect a high level of comfort and aesthetic beauty at their hotel.
- Regardless of location, hotels and restaurants must understand and meet the expectations of locals and travelers to the region.
- Design must be aimed at its target audience.
- Thoughtful and detailed design create strong and positive brand identity.



Image and Design are the visual manifestation of a concept and should fulfill the guests' expectations of their experience.

Demands on unique and creative designs are escalating.

Aesthetic is not a luxury, but have become a universal human desire.

Hospitality Demands are Changing

A room is a room is a room. Restaurants have created a unique personality in a saturated, and commoditized, room market.

Restaurants have become the nucleus of many communities' social activity.

Globalization and increasing guest aesthetic expectations have created high expectations for restaurant experiences.

Understanding who your guests are, in the broadest sense, and their expectations has made restaurant concepts and design an art form.

www.puccinigroup.com



CREATING DESTINATION RESTAURANTS FOR THE WORLD'S GREAT HOTELS