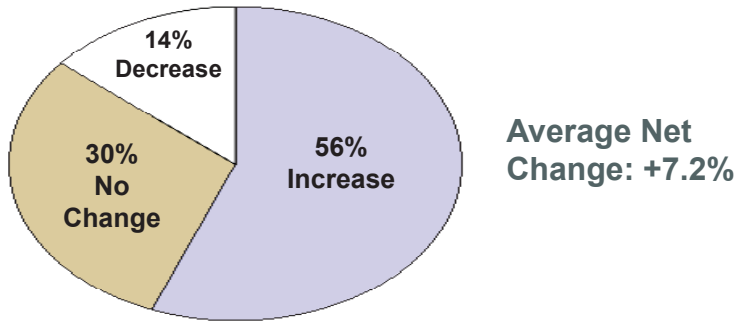


Foodservice Revenues Are Expanding Rapidly ... Making Lodging The Fastest Growing Market Segment For Foodservice Suppliers

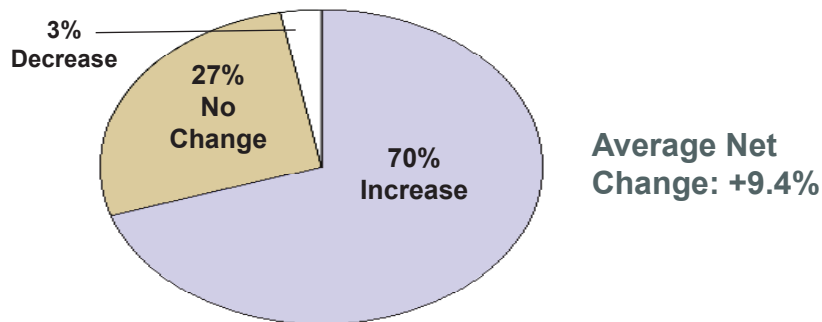
Q. "Which best describes the trend in your average property's sales for all food and beverages, at all outlets?"

**• Growth In Foodservice Revenues
(Audience Of Hotel F&B)**

a. Change In Revenues - 2010 To 2011



b. Projected Change In Revenues - 2011 To 2012



**• Lodging:
Forecasted By Technomic To Grow More Rapidly
Than Other Foodservice Market Segments**

Annual Growth (CAGR) - 2011 To 2015	
<u>Market Segment</u>	<u>Ranking</u>
• Hotels/Lodging	#1
• Colleges & Universities	#2
• Limited Service Restaurants	#3
• Full Service Restaurants	#4
• Bars/Taverns	#5
• Recreation	#6

Source: "The Hotel/Lodging Segment: A Deep Dive Into Consumer Trends", Technomic, 2011

Source: "Dynamics of Supplier Selection in the Lodging/Foodservice Market"; Akel & Associates; 2011; distribution of this confidential information by any organization other than the recipient is prohibited.