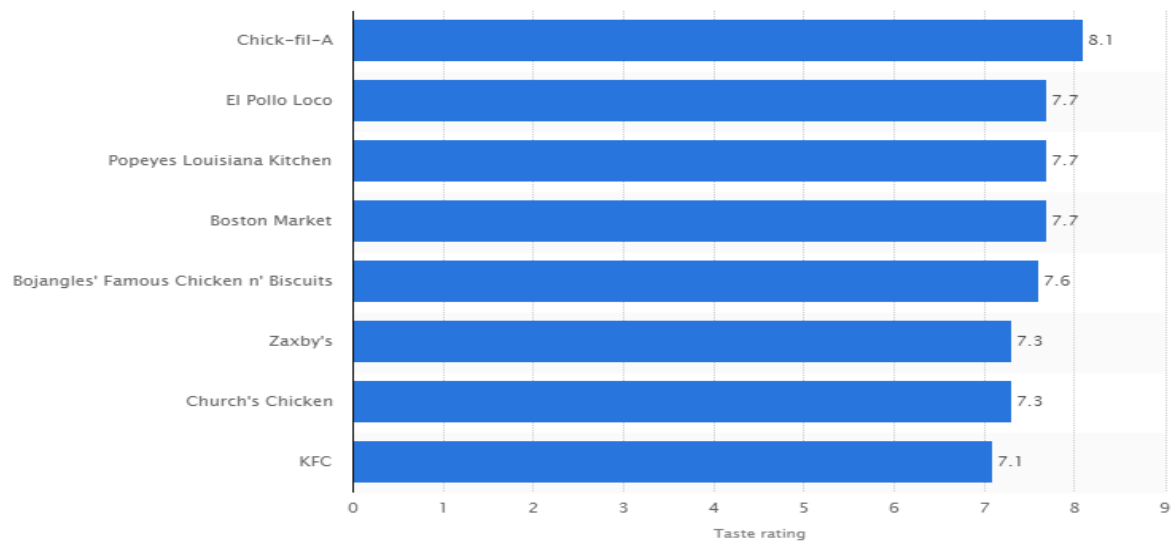


Sustainability Study



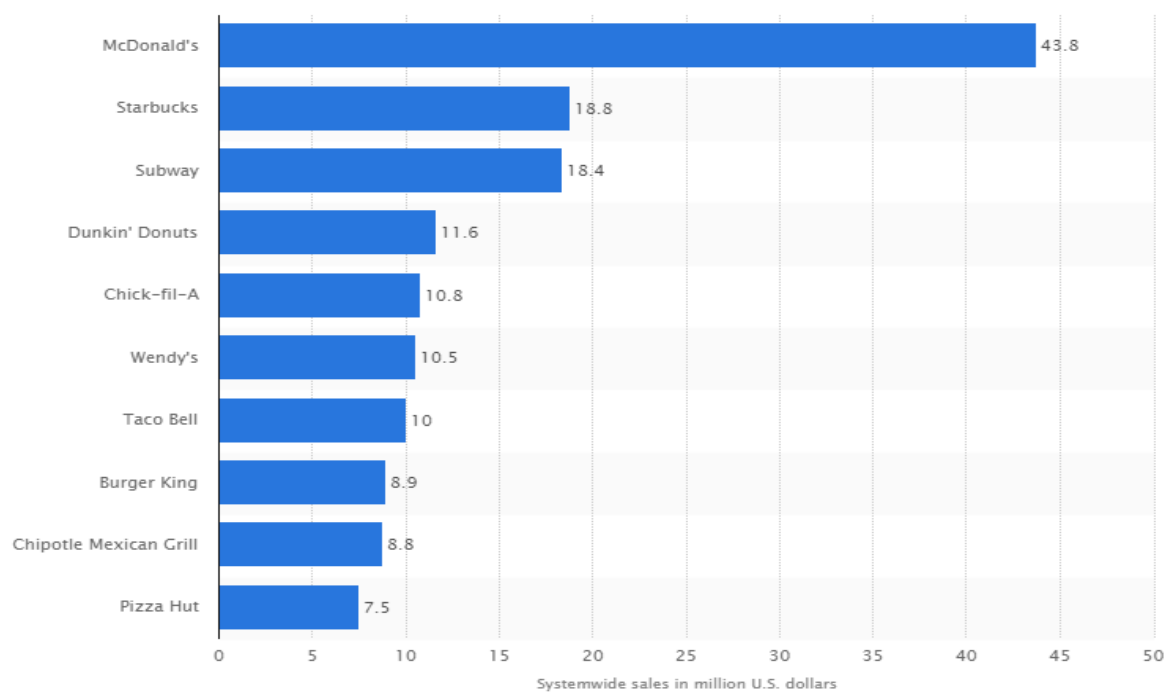
1. Brand; currently and then a 5 year forecast

Taste rating of selected chicken restaurant chains in the United States as of July 2014



This statistic shows the taste rating of selected chicken restaurant chains in the United States as of July 2014.

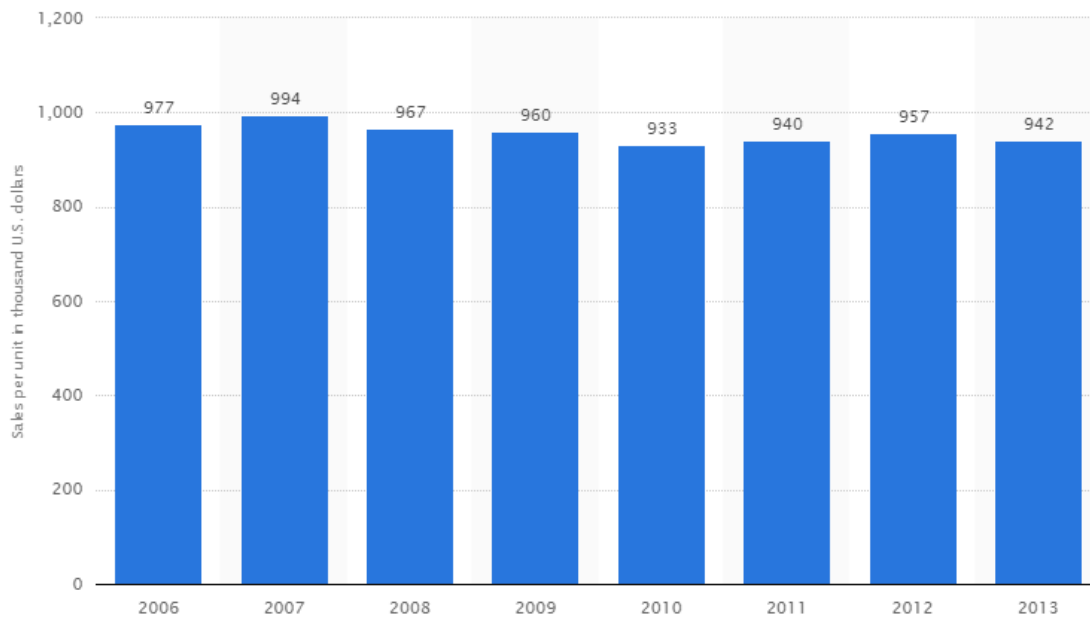
Projection of the leading United States restaurant chains in systemwide sales in 2020 (in million U.S. dollars)



This statistic shows a projection of the leading United States restaurant chains in systemwide sales in 2020.

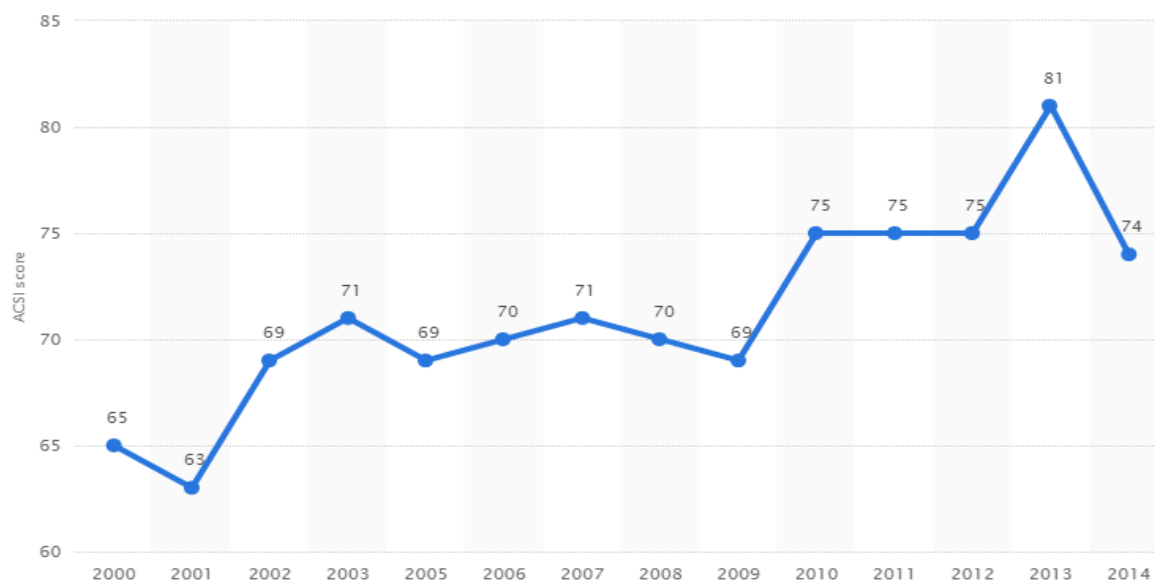
2. Demographics and analysis of key markets

Kentucky Fried Chicken - average sales per unit in the United States from 2006 to 2013
(in thousand U.S. dollars)

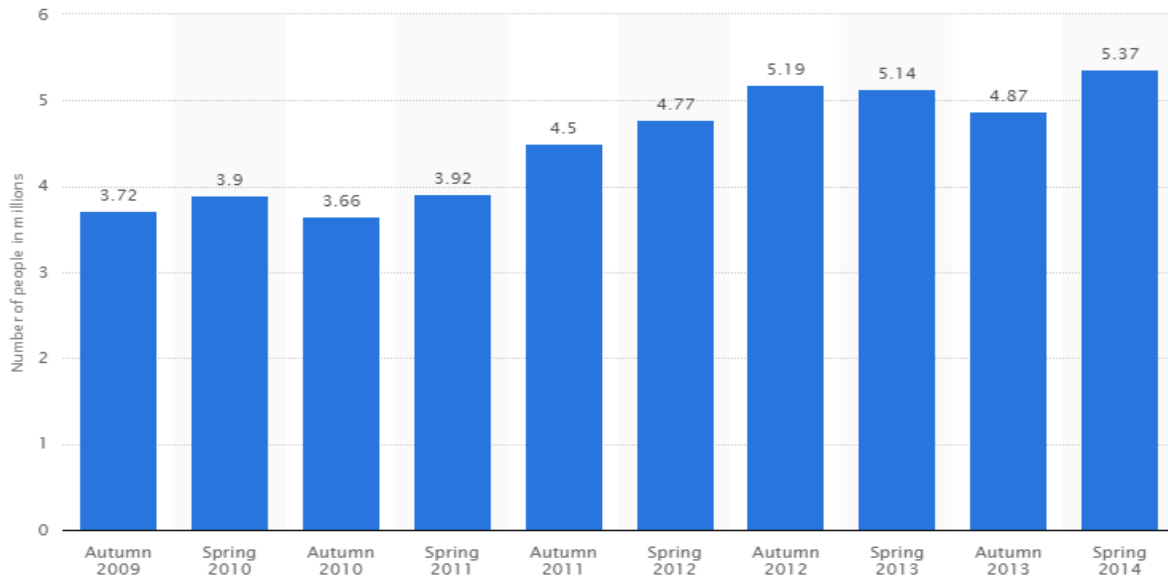


This statistic shows the average sales per unit of KFC in the United States from 2006 to 2013. In 2013, KFC's average sales per unit reached 942 thousand U.S. dollars.

American customer satisfaction index scores of Kentucky Fried Chicken restaurants in the United States from 2000 to 2014*



Restaurant visit: Number of people who visited Chick-fil-A for breakfast within the last 30 days in the United States (USA) from autumn 2009 to spring 2014 (in millions)

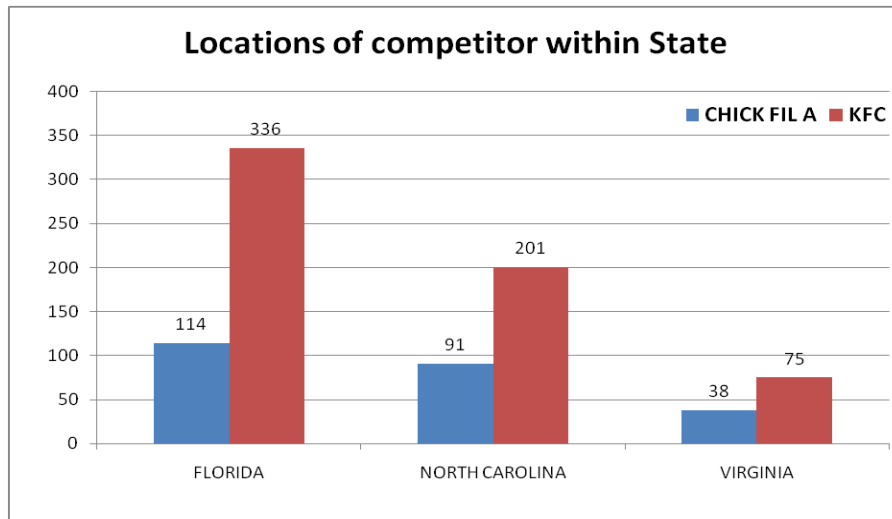


This statistic illustrates the number of people who visited Chick-fil-A for breakfast within the last 30 days in the United States (USA) from autumn 2009 to spring 2014. In autumn 2009, the number of people who visited Chick-fil-A for breakfast within a period of 30 days amounted to 3.72 million.

3. Locations of competitor within the entire State

This statistic shows the number of units for the two competitors under study, in the three states of Florida, North Carolina, & Virginia.

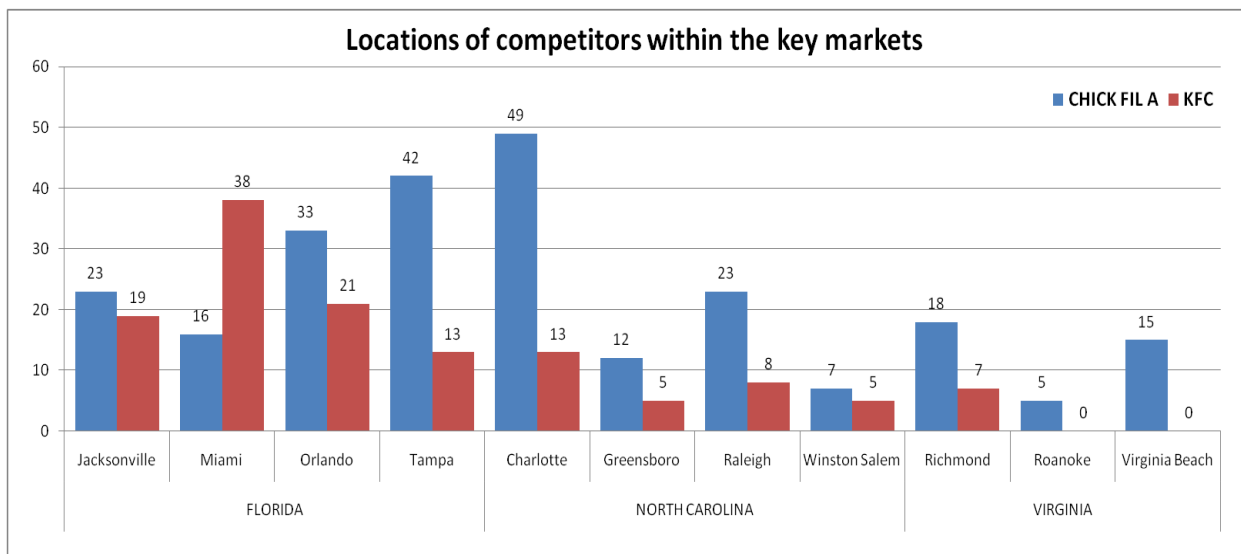
State	CHICK FIL A Locations	KFC Locations
FLORIDA	114	336
NORTH CAROLINA	91	201
VIRGINIA	38	75



4. Location of competitor within the key markets

This statistic shows the number of units for the two competitors under study, in the chosen key markets,

State	Key Market	CHICK FIL A Locations	KFC Locations
FLORIDA	Jacksonville	23	19
	Miami	16	38
	Orlando	33	21
	Tampa	42	13
NORTH CAROLINA	Charlotte	49	13
	Greensboro	12	5
	Raleigh	23	8
	Winston Salem	7	5
VIRGINIA	Richmond	18	7
	Roanoke	5	0
	Virginia Beach	15	0



5. Determination how many of our stores can penetrate into States and Key Markets

In order to determine how many of our stores can penetrate into States and Key Markets we analyzed locations of KFC and CHICK FIL A.

The zip code of the competitor's restaurant locations were used to find the growth potential in that particular zip code.

Areas where there is no competitor were identified as the ones with Very High growth potential, where there is at least one competitor were identified as the ones with High potential. Areas having 2 outlets of the competitors have Moderate potential and those with more than 3 have No Scope.

This data is summarized in the below table. The detailed list of zip codes is given in the Appendix.

State	# of stores can penetrate
FLORIDA	133
NORTH CAROLINA	67
VIRGINIA	33

State	Key Market	# of stores can penetrate
FLORIDA	Jacksonville	19
	Miami	39
	Orlando	33
	Tampa	42
NORTH CAROLINA	Charlotte	34
	Greensboro	9
	Raleigh	18
	Winston Salem	6
VIRGINIA	Richmond	16
	Roanoke	4
	Virginia Beach	13

State	Key Market	Growth Potential	#r of Zip Code Areas having Growth Potential
NORTH CAROLINA	Raleigh	Very High	1
VIRGINIA	Richmond	Very High	3
FLORIDA	Jacksonville	High	13
FLORIDA	Miami	High	27

FLORIDA	Orlando	High	22
FLORIDA	Tampa	High	35
NORTH CAROLINA	Charlotte	High	23
NORTH CAROLINA	Greensboro	High	7
NORTH CAROLINA	Raleigh	High	13
NORTH CAROLINA	Winston Salem	High	4
VIRGINIA	Richmond	High	8
VIRGINIA	Roanoke	High	3
VIRGINIA	Virginia Beach	High	11
FLORIDA	Jacksonville	Moderate	6
FLORIDA	Miami	Moderate	12
FLORIDA	Orlando	Moderate	11
FLORIDA	Tampa	Moderate	7
NORTH CAROLINA	Charlotte	Moderate	11
NORTH CAROLINA	Greensboro	Moderate	2
NORTH CAROLINA	Raleigh	Moderate	4
NORTH CAROLINA	Winston Salem	Moderate	2
VIRGINIA	Richmond	Moderate	5
VIRGINIA	Roanoke	Moderate	1
VIRGINIA	Virginia Beach	Moderate	2
FLORIDA	Jacksonville	No Scope	5
FLORIDA	Miami	No Scope	1
FLORIDA	Orlando	No Scope	3
FLORIDA	Tampa	No Scope	2
NORTH CAROLINA	Charlotte	No Scope	5
NORTH CAROLINA	Greensboro	No Scope	2
NORTH CAROLINA	Raleigh	No Scope	3
NORTH CAROLINA	Winston Salem	No Scope	1
VIRGINIA	Richmond	No Scope	2

Appendix:

State	Key Market	Zip Code	Chick A Fil	KFC	Growth Potential
NORTH CAROLINA	Raleigh	27606	0	0	Very High
VIRGINIA	Richmond	23223	0	0	Very High
VIRGINIA	Richmond	23224	0	0	Very High
VIRGINIA	Richmond	23234	0	0	Very High

State	Key Market	Zip Code	Chick A Fil	KFC	Growth Potential
FLORIDA	Jacksonville	31548	1	0	High
FLORIDA	Jacksonville	32003	1	0	High
FLORIDA	Jacksonville	32068	1	0	High
FLORIDA	Jacksonville	32097	1	0	High
FLORIDA	Jacksonville	32205	0	1	High
FLORIDA	Jacksonville	32206	0	1	High
FLORIDA	Jacksonville	32207	1	0	High
FLORIDA	Jacksonville	32209	0	1	High
FLORIDA	Jacksonville	32211	1	0	High
FLORIDA	Jacksonville	32217	0	1	High
FLORIDA	Jacksonville	32221	0	1	High
FLORIDA	Jacksonville	32222	1	0	High
FLORIDA	Jacksonville	32277	0	1	High
FLORIDA	Miami	33014	1	0	High
FLORIDA	Miami	33027	1	0	High
FLORIDA	Miami	33062	1	0	High
FLORIDA	Miami	33071	1	0	High
FLORIDA	Miami	33125	0	1	High
FLORIDA	Miami	33130	0	1	High
FLORIDA	Miami	33135	0	1	High
FLORIDA	Miami	33138	0	1	High
FLORIDA	Miami	33140	0	1	High
FLORIDA	Miami	33141	0	1	High
FLORIDA	Miami	33145	0	1	High
FLORIDA	Miami	33147	0	1	High
FLORIDA	Miami	33155	0	1	High
FLORIDA	Miami	33168	0	1	High
FLORIDA	Miami	33169	0	1	High
FLORIDA	Miami	33174	0	1	High
FLORIDA	Miami	33175	0	1	High
FLORIDA	Miami	33178	1	0	High
FLORIDA	Miami	33181	0	1	High
FLORIDA	Miami	33199	1	0	High

FLORIDA	Miami	33306	1	0	High
FLORIDA	Miami	33323	1	0	High
FLORIDA	Miami	33324	1	0	High
FLORIDA	Miami	33331	1	0	High
FLORIDA	Miami	33351	1	0	High
FLORIDA	Miami	33388	1	0	High
FLORIDA	Miami	33431	1	0	High
FLORIDA	Orlando	32701	1	0	High
FLORIDA	Orlando	32703	1	0	High
FLORIDA	Orlando	32708	1	0	High
FLORIDA	Orlando	32714	1	0	High
FLORIDA	Orlando	32730	1	0	High
FLORIDA	Orlando	32746	1	0	High
FLORIDA	Orlando	32757	1	0	High
FLORIDA	Orlando	32763	1	0	High
FLORIDA	Orlando	32765	1	0	High
FLORIDA	Orlando	32771	1	0	High
FLORIDA	Orlando	32789	1	0	High
FLORIDA	Orlando	32792	1	0	High
FLORIDA	Orlando	32808	0	1	High
FLORIDA	Orlando	32811	1	0	High
FLORIDA	Orlando	32816	1	0	High
FLORIDA	Orlando	32818	0	1	High
FLORIDA	Orlando	32827	1	0	High
FLORIDA	Orlando	34711	1	0	High
FLORIDA	Orlando	34746	1	0	High
FLORIDA	Orlando	34761	1	0	High
FLORIDA	Orlando	34769	1	0	High
FLORIDA	Orlando	34787	1	0	High
FLORIDA	Tampa	33604	0	1	High
FLORIDA	Tampa	33610	0	1	High
FLORIDA	Tampa	33611	0	1	High
FLORIDA	Tampa	33613	1	0	High
FLORIDA	Tampa	33614	0	1	High
FLORIDA	Tampa	33615	0	1	High
FLORIDA	Tampa	33617	1	0	High
FLORIDA	Tampa	33618	1	0	High
FLORIDA	Tampa	33619	0	1	High
FLORIDA	Tampa	33620	1	0	High
FLORIDA	Tampa	33629	0	1	High
FLORIDA	Tampa	33634	1	0	High
FLORIDA	Tampa	33703	1	0	High
FLORIDA	Tampa	33706	1	0	High

FLORIDA	Tampa	33761	1	0	High
FLORIDA	Tampa	33762	1	0	High
FLORIDA	Tampa	33763	1	0	High
FLORIDA	Tampa	33765	1	0	High
FLORIDA	Tampa	33771	1	0	High
FLORIDA	Tampa	33772	1	0	High
FLORIDA	Tampa	33781	1	0	High
FLORIDA	Tampa	33801	1	0	High
FLORIDA	Tampa	33813	1	0	High
FLORIDA	Tampa	33880	1	0	High
FLORIDA	Tampa	34203	1	0	High
FLORIDA	Tampa	34205	1	0	High
FLORIDA	Tampa	34207	1	0	High
FLORIDA	Tampa	34232	1	0	High
FLORIDA	Tampa	34233	1	0	High
FLORIDA	Tampa	34238	1	0	High
FLORIDA	Tampa	34613	1	0	High
FLORIDA	Tampa	34655	1	0	High
FLORIDA	Tampa	34668	1	0	High
FLORIDA	Tampa	34677	1	0	High
FLORIDA	Tampa	34684	1	0	High
NORTH CAROLINA	Charlotte	28012	1	0	High
NORTH CAROLINA	Charlotte	28017	1	0	High
NORTH CAROLINA	Charlotte	28056	1	0	High
NORTH CAROLINA	Charlotte	28078	1	0	High
NORTH CAROLINA	Charlotte	28079	1	0	High
NORTH CAROLINA	Charlotte	28104	1	0	High
NORTH CAROLINA	Charlotte	28105	1	0	High
NORTH CAROLINA	Charlotte	28117	1	0	High
NORTH CAROLINA	Charlotte	28134	1	0	High
NORTH CAROLINA	Charlotte	28144	1	0	High
NORTH CAROLINA	Charlotte	28202	1	0	High
NORTH CAROLINA	Charlotte	28203	1	0	High
NORTH CAROLINA	Charlotte	28213	0	1	High
NORTH CAROLINA	Charlotte	28217	0	1	High
NORTH CAROLINA	Charlotte	28223	1	0	High
NORTH CAROLINA	Charlotte	28280	1	0	High
NORTH CAROLINA	Charlotte	28625	1	0	High
NORTH CAROLINA	Charlotte	29341	1	0	High
NORTH CAROLINA	Charlotte	29707	1	0	High
NORTH CAROLINA	Charlotte	29708	1	0	High
NORTH CAROLINA	Charlotte	29720	1	0	High
NORTH CAROLINA	Charlotte	29730	1	0	High

NORTH CAROLINA	Charlotte	29732	1	0	High
NORTH CAROLINA	Greensboro	27262	1	0	High
NORTH CAROLINA	Greensboro	27284	1	0	High
NORTH CAROLINA	Greensboro	27405	0	1	High
NORTH CAROLINA	Greensboro	27406	0	1	High
NORTH CAROLINA	Greensboro	27411	1	0	High
NORTH CAROLINA	Greensboro	27412	1	0	High
NORTH CAROLINA	Greensboro	27455	1	0	High
NORTH CAROLINA	Raleigh	27502	1	0	High
NORTH CAROLINA	Raleigh	27511	1	0	High
NORTH CAROLINA	Raleigh	27513	1	0	High
NORTH CAROLINA	Raleigh	27519	1	0	High
NORTH CAROLINA	Raleigh	27540	1	0	High
NORTH CAROLINA	Raleigh	27545	1	0	High
NORTH CAROLINA	Raleigh	27587	1	0	High
NORTH CAROLINA	Raleigh	27601	1	0	High
NORTH CAROLINA	Raleigh	27605	1	0	High
NORTH CAROLINA	Raleigh	27616	1	0	High
NORTH CAROLINA	Raleigh	27617	1	0	High
NORTH CAROLINA	Raleigh	27695	1	0	High
NORTH CAROLINA	Raleigh	27713	1	0	High
NORTH CAROLINA	Winston Salem	27101	0	1	High
NORTH CAROLINA	Winston Salem	27109	1	0	High
NORTH CAROLINA	Winston Salem	27127	0	1	High
NORTH CAROLINA	Winston Salem	27284	1	0	High
VIRGINIA	Richmond	23005	1	0	High
VIRGINIA	Richmond	23059	1	0	High
VIRGINIA	Richmond	23111	1	0	High
VIRGINIA	Richmond	23112	1	0	High
VIRGINIA	Richmond	23113	1	0	High
VIRGINIA	Richmond	23230	1	0	High
VIRGINIA	Richmond	23298	1	0	High
VIRGINIA	Richmond	23831	1	0	High
VIRGINIA	Roanoke	24014	1	0	High
VIRGINIA	Roanoke	24018	1	0	High
VIRGINIA	Roanoke	24153	1	0	High
VIRGINIA	Virginia Beach	23451	1	0	High
VIRGINIA	Virginia Beach	23454	1	0	High
VIRGINIA	Virginia Beach	23455	1	0	High
VIRGINIA	Virginia Beach	23456	1	0	High
VIRGINIA	Virginia Beach	23462	1	0	High
VIRGINIA	Virginia Beach	23464	1	0	High
VIRGINIA	Virginia Beach	23502	1	0	High

VIRGINIA	Virginia Beach	23504	1	0	High
VIRGINIA	Virginia Beach	23510	1	0	High
VIRGINIA	Virginia Beach	23529	1	0	High
VIRGINIA	Virginia Beach	23707	1	0	High

State	Key Market	Zip Code	Chick A Fil	KFC	Growth Potential
FLORIDA	Jacksonville	32073	2	0	Moderate
FLORIDA	Jacksonville	32084	2	0	Moderate
FLORIDA	Jacksonville	32218	1	1	Moderate
FLORIDA	Jacksonville	32223	0	2	Moderate
FLORIDA	Jacksonville	32224	2	0	Moderate
FLORIDA	Jacksonville	32246	1	1	Moderate
FLORIDA	Miami	33026	2	0	Moderate
FLORIDA	Miami	33127	0	2	Moderate
FLORIDA	Miami	33142	0	2	Moderate
FLORIDA	Miami	33150	0	2	Moderate
FLORIDA	Miami	33156	1	1	Moderate
FLORIDA	Miami	33157	0	2	Moderate
FLORIDA	Miami	33162	0	2	Moderate
FLORIDA	Miami	33177	0	2	Moderate
FLORIDA	Miami	33183	0	2	Moderate
FLORIDA	Miami	33184	0	2	Moderate
FLORIDA	Miami	33185	0	2	Moderate
FLORIDA	Miami	33186	0	2	Moderate
FLORIDA	Orlando	32803	1	1	Moderate
FLORIDA	Orlando	32805	0	2	Moderate
FLORIDA	Orlando	32806	1	1	Moderate
FLORIDA	Orlando	32807	0	2	Moderate
FLORIDA	Orlando	32809	1	1	Moderate
FLORIDA	Orlando	32810	1	1	Moderate
FLORIDA	Orlando	32821	1	1	Moderate
FLORIDA	Orlando	32828	1	1	Moderate
FLORIDA	Orlando	32837	1	1	Moderate
FLORIDA	Orlando	32839	1	1	Moderate
FLORIDA	Orlando	34747	2	0	Moderate
FLORIDA	Tampa	33606	1	1	Moderate
FLORIDA	Tampa	33607	1	1	Moderate
FLORIDA	Tampa	33609	2	0	Moderate
FLORIDA	Tampa	33625	1	1	Moderate
FLORIDA	Tampa	33647	1	1	Moderate
FLORIDA	Tampa	33710	2	0	Moderate
FLORIDA	Tampa	33809	2	0	Moderate

NORTH CAROLINA	Charlotte	28025	2	0	Moderate
NORTH CAROLINA	Charlotte	28110	2	0	Moderate
NORTH CAROLINA	Charlotte	28152	2	0	Moderate
NORTH CAROLINA	Charlotte	28208	0	2	Moderate
NORTH CAROLINA	Charlotte	28209	2	0	Moderate
NORTH CAROLINA	Charlotte	28212	0	2	Moderate
NORTH CAROLINA	Charlotte	28226	1	1	Moderate
NORTH CAROLINA	Charlotte	28227	1	1	Moderate
NORTH CAROLINA	Charlotte	28262	2	0	Moderate
NORTH CAROLINA	Charlotte	28277	2	0	Moderate
NORTH CAROLINA	Charlotte	28602	2	0	Moderate
NORTH CAROLINA	Greensboro	27265	2	0	Moderate
NORTH CAROLINA	Greensboro	27408	1	1	Moderate
NORTH CAROLINA	Raleigh	27518	2	0	Moderate
NORTH CAROLINA	Raleigh	27529	2	0	Moderate
NORTH CAROLINA	Raleigh	27604	1	1	Moderate
NORTH CAROLINA	Raleigh	27610	0	2	Moderate
NORTH CAROLINA	Winston Salem	27105	1	1	Moderate
NORTH CAROLINA	Winston Salem	27106	1	1	Moderate
VIRGINIA	Richmond	23225	1	1	Moderate
VIRGINIA	Richmond	23227	0	2	Moderate
VIRGINIA	Richmond	23231	1	1	Moderate
VIRGINIA	Richmond	23233	2	0	Moderate
VIRGINIA	Richmond	23284	2	0	Moderate
VIRGINIA	Roanoke	24012	2	0	Moderate
VIRGINIA	Virginia Beach	23320	2	0	Moderate
VIRGINIA	Virginia Beach	23452	2	0	Moderate

State	Key Market	Zip Code	Chick A Fil	KFC	Growth Potential
FLORIDA	Jacksonville	32210	1	2	No Scope
FLORIDA	Jacksonville	32216	1	2	No Scope
FLORIDA	Jacksonville	32225	2	2	No Scope
FLORIDA	Jacksonville	32250	1	2	No Scope
FLORIDA	Jacksonville	32256	3	1	No Scope
FLORIDA	Miami	33165	0	3	No Scope
FLORIDA	Orlando	32817	1	2	No Scope
FLORIDA	Orlando	32819	1	2	No Scope
FLORIDA	Orlando	32822	1	3	No Scope
FLORIDA	Tampa	33511	3	0	No Scope
FLORIDA	Tampa	33612	1	2	No Scope
NORTH CAROLINA	Charlotte	28027	3	0	No Scope
NORTH CAROLINA	Charlotte	28211	2	1	No Scope

NORTH CAROLINA	Charlotte	28216	3	1	No Scope
NORTH CAROLINA	Charlotte	28269	1	2	No Scope
NORTH CAROLINA	Charlotte	28273	3	1	No Scope
NORTH CAROLINA	Greensboro	27407	2	1	No Scope
NORTH CAROLINA	Greensboro	27410	2	1	No Scope
NORTH CAROLINA	Raleigh	27609	1	2	No Scope
NORTH CAROLINA	Raleigh	27612	2	1	No Scope
NORTH CAROLINA	Raleigh	27615	2	2	No Scope
NORTH CAROLINA	Winston Salem	27103	3	1	No Scope
VIRGINIA	Richmond	23229	2	1	No Scope
VIRGINIA	Richmond	23235	2	2	No Scope