

Snapshot of Franchising in Canada



What Does CFA's Membership Look Like?

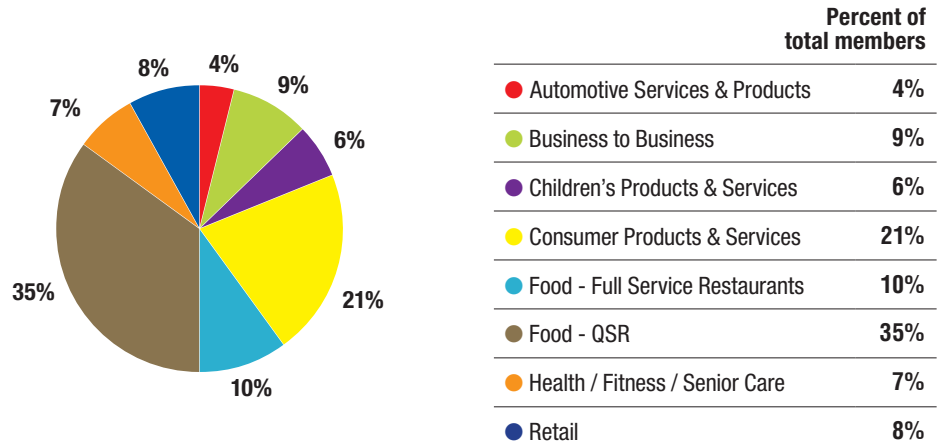
Over
700
members

Operating in over
60
different sectors

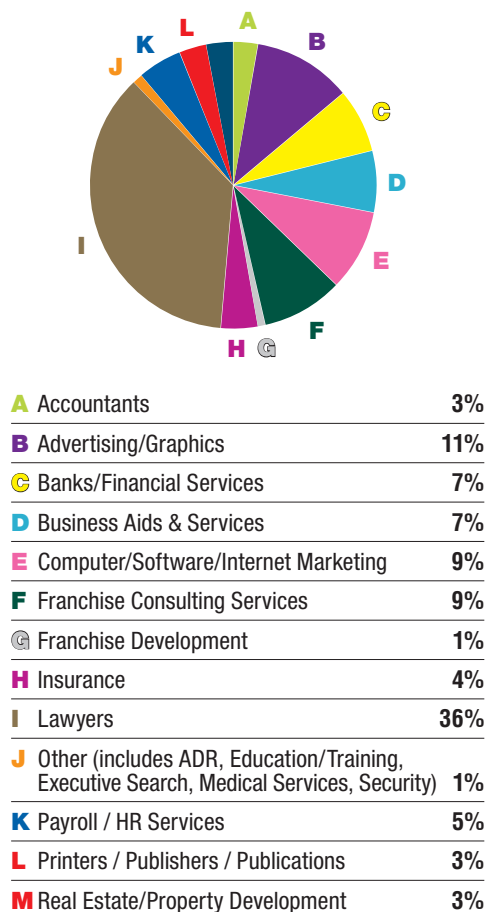
390
franchise systems,
with
556
brands

CFA members
represent more than
40,000
franchised outlets
across Canada

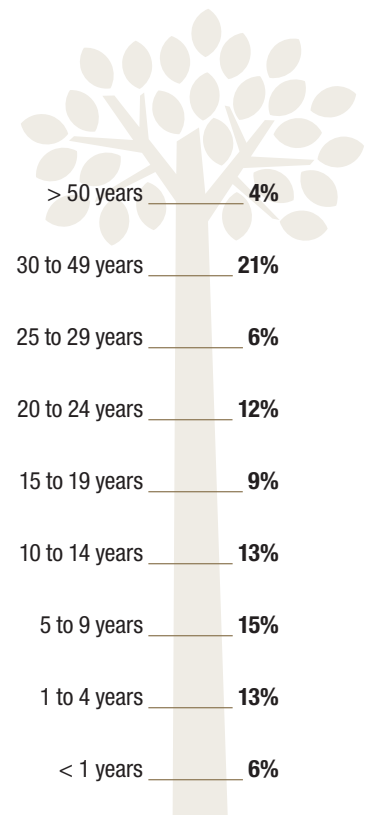
CFA Membership Breakdown by Sector - Based on 2017 FranchiseCanada Annual Directory



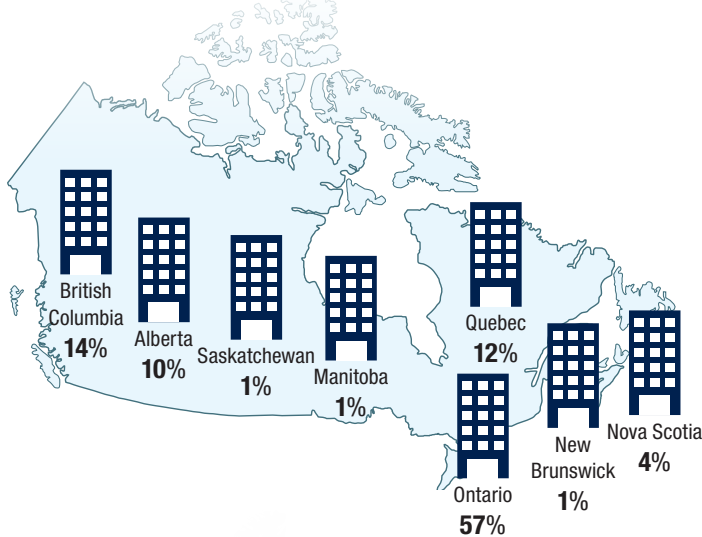
FSS Supplier Membership Breakdown



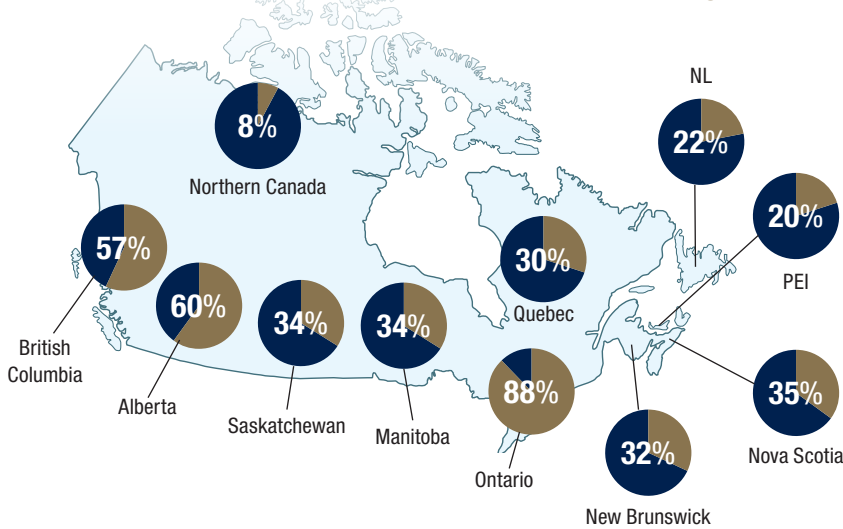
CFA Franchise System Members by Number of Years Franchising in Canada



Where are CFA members headquartered?



Where are CFA member franchise systems operating?



*Results add to more than 100% due to multiple responses.

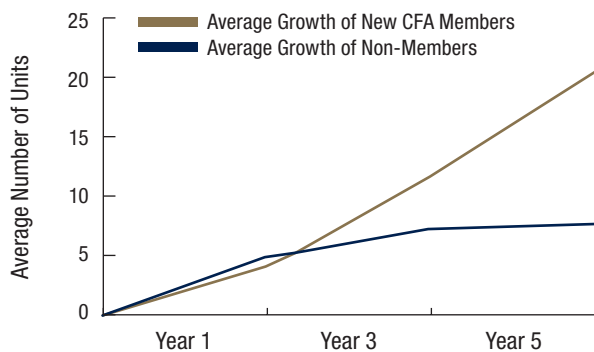
The universe of franchise brands in Canada by total Canadian units (franchise & corporate)

Units	Percentage
0 to 4	42%
5 to 15	22%
16 to 30	11%
31 to 50	8%
51 to 100	8%
101 to 150	3%
151+	6%

What's CFA membership market penetration?

CFA members represent 44% of franchise brands in Canada. 66% of those brands have over 51 units. Meanwhile, non-CFA franchisors represent only 34% of the brands that have over 51 units.

Units	Franchise Brands	
	CFA Member	Non-Member
0 to 4	27%	73%
5 to 15	41%	59%
16 to 30	55%	45%
31 to 50	61%	39%
51 to 100	64%	36%
101 to 150	69%	31%
151+	67%	33%



5-year growth of new CFA members vs. non-members

By year 5, CFA members typically have

166%

more franchises than non-members!