

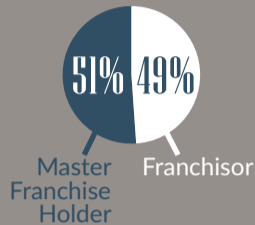


FRANCHISING IN IRELAND

PROFILING & SIZING



Respondent



2,975

Franchise Units

90% 10%
RoI NI

31% 69%
Company Owned Franchise Network

28,048

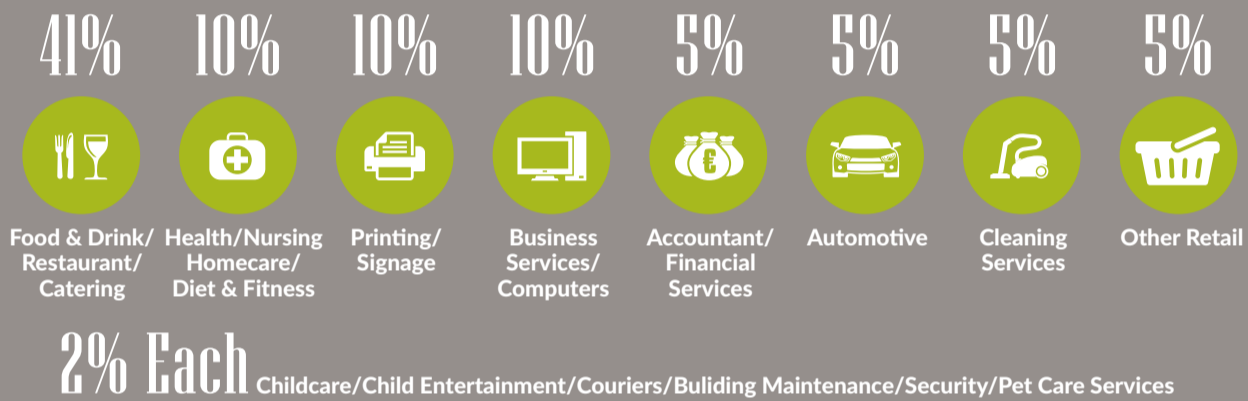
Staff Employed

6 out of 10

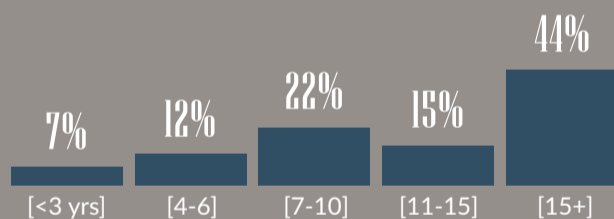
businesses expect staff numbers to increase by on average

20% in 2015

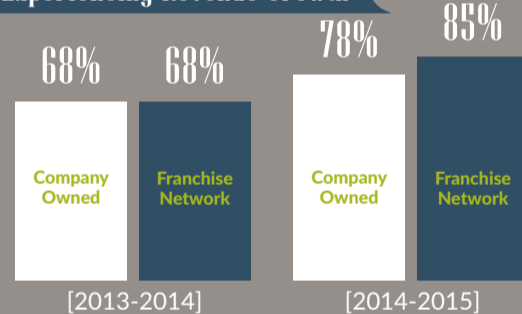
Sectors



Years Operating

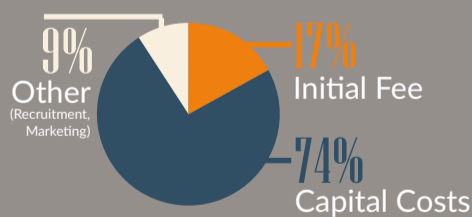


Experiencing Revenue Growth

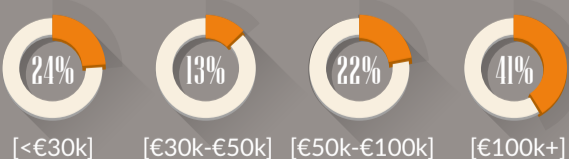


FEES & TERMS

Initial Franchise Set-up



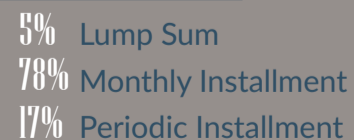
Total Set-up Costs



Ongoing Fees Applied



Pagable via



63%
of Agreements involve an
EXCLUSIVE TERRITORY

81%
of Agreements include a
PERFORMANCE CLAUSE

OPPORTUNITIES & CHALLENGES

Outlook for Sector

When the outlook situation will be better

37%

1 Year

54%

3 Years

5%

5 Years

2%

+5 Years

2%

Not Stated

No.1 Opportunity

More Customers/
Increased Demand



Other opportunities

To Expand
Nationally



Overseas Markets/
Investment



Stronger Market
Recovery



No.1 Challenge

Finding (the right)
Franchisees/
Increase Presence



Other challenges

Competition



Increasing
Operation Costs



Staffing/Training



Access to/Securing
Finance



INVESTMENT - NEXT 3 YEARS

Top 5 Initiatives

98%



Introducing new
technologies to drive
operational efficiencies

98%



Recruiting new
franchisees/expanding
existing network

85%



Expand existing
service offerings

85%



Investing in online
and social media
communications

78%



Increasing staff
numbers

Funded by

59%



Re-investing of fees
from existing
franchises

54%



Securing bank
funding

46%



Using own personal
funds

15%



Looking for external
investment/equity