



**Canadian  
Franchise  
Association™**

**Growing Together**

Franchise Forecast 2019  
Canadian Franchise Industry  
Economic Outlook

CANADIAN CENTRE FOR  
ECONOMIC ANALYSIS



## Franchise Forecast 2019: Executive Summary

The franchise business model helps everyday Canadians realize the dream of building their own business, the strength of our nation's franchising industry is vital to the strength of the economy, and our society.

Made up of thousands of small businesses in every community from coast to coast, the franchising sector is the 12th largest contributor to the Canadian economy. While franchise concepts operating in the food service category dominate the industry, there's more to franchising than just fast food.

You'd be hard-pressed to find a Canadian neighbourhood devoid of a franchise business serving its residents. With franchise systems operating in more than 50 different sectors, Canadians from Halifax to Victoria are interacting with franchises on a daily basis. From getting their morning coffee, to dropping their kids off at day care, to getting their houses cleaned, to having lunch, to picking up their dry cleaning, to buying food for dinner, to going to a restaurant with friends, to staying at a hotel while on vacation or during a business trip, the franchise model is an important part of their day-to-day lives.

2019 is a momentous year for our sector, which is expected to top the \$100 billion mark for the first time. Our sector directly and indirectly employs 1.9 million people in various sectors such as; the food services, retail, commercial and residential services, and accommodation services sectors.

Canada's franchising sector is strong and continues to grow across Canada. The Canadian franchise industry is estimated to have almost 1,200 brands and more than 76,000 franchise locations across a variety of sectors. Over the past five years, the number of franchise brands has grown 23 per cent and the number of Canadian establishments, both franchised and corporate, has increased by four per cent.



**76,000+**  
Expected number  
of franchise units in  
Canada by the end of  
2019



**12th**  
The franchise industry  
as a whole ranks as the  
12th largest industry in  
Canada.

Unsurprisingly, given the size of its economy, Ontario is estimated to have the largest number of franchise locations. However, on a percentage basis, the largest growth is estimated to occur in British Columbia, where the number of franchise locations is expected to grow by 1.16 per cent. This projection is based on current trends, but any large-scale public policy changes could derail this expected growth.

Franchise growth in Atlantic Canada is still slow, with the number of franchise locations in the region estimated to grow by only 0.46 per cent. We think that there is still great opportunity in Atlantic Canada, and we look forward to working with the government and the business community to help make the investments necessary to help grow the economy in this important region.

Our members and our industry are proud of the economic and social contributions we make to the communities that we live and work in. Our sector contributes a great deal to the economy, which helps pay for the public services and infrastructure that Canadians rely on. We are proud to pay our fair share, which will contribute almost \$28 billion in tax revenue to federal and provincial coffers this year.

At the heart of franchising is the concept of Growing Together™. It's about people working together in partnership, sharing successes, and becoming stronger through cooperation. As an Association we are proud to represent Canada's \$100 billion franchising sector and the thousands of Canadians whose livelihoods depend on the success of franchise businesses in every community across the country. We look forward to Growing Together™ as an industry in 2019 and beyond.

Sincerely

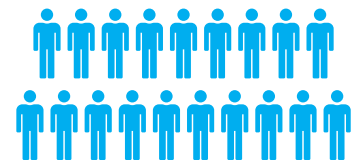


Sherry McNeil, President and CEO  
Canadian Franchise Association



Franchising is estimated to grow by 2.59% (+\$2.5 billion), increasing the total franchise-related GDP contribution to

**\$100.6 billion**



**1.9 million**  
Canadians are projected to be employed by the franchise industry in 2019

**This report is an independent study conducted on behalf of:**

**CANADIAN FRANCHISE ASSOCIATION**

The Canadian Franchise Association (CFA) helps everyday Canadians realize the dream of building their own business through the power of franchising. CFA advocates on issues that impact this dream on behalf of more than 700 corporate members and over 40,000 franchisees from many of Canada's best-known and emerging franchise brands. Beyond its role as the voice of the franchise industry, CFA strengthens and develops franchising by delivering best-practice education and creating rewarding connections between Canadians and the opportunities in franchising. Founded in 1967, CFA consistently advances and supports the franchise community, and is the essential resource for information, insight, and expertise through its award-winning education, events, services, and websites: [www.cfa.ca](http://www.cfa.ca) and [FranchiseCanada.online](http://FranchiseCanada.online).

## About the Canadian Centre for Economic Analysis

The Canadian Centre for Economic Analysis (CANCEA) is a socio-economic research and data firm. CANCEA provides objective, independent and evidence-based analysis and is dedicated to a comprehensive, collaborative, and quantitative understanding of the short- and long-term risks and returns behind market changes, policy decisions and economic behaviour.

CANCEA uses modern techniques in data science and simulation for econometric analysis, business risk management assessments and demographic forecasts. CANCEA's work includes market analysis, policy evaluation and risk management, business model optimization, cost effectiveness and rate of return analysis, macroeconomic analysis, insurance risk evaluation, land use and infrastructure planning, logistics, and labour market analysis.

CANCEA also provides comprehensive Canadian data services incorporating 56,000 locations across Canada. Given the systems focus behind all of CANCEA's work, CANCEA has a one model approach to its analysis which allows various disciplines and stakeholders to be incorporated into a single analysis allowing for intended and unintended consequences to be understood.

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## About the Report

CANCEA does not accept any research funding or client engagements that require a pre-determined result or policy stance or otherwise inhibit its independence.

In keeping with CANCEA's guidelines for funded research, the design and method of research, as well as the content of this study, were determined solely by CANCEA.

This information is not intended as specific investment, accounting, legal or tax advice.

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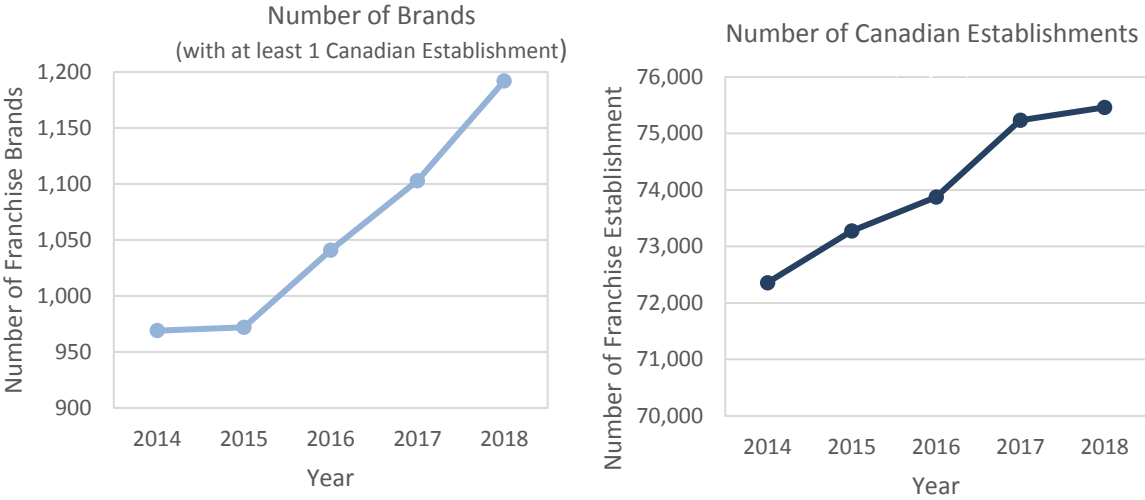
# 1.0 OVERVIEW

This report outlines the economic forecast for the Canadian Franchise Industry for 2019 and covers the net change in the number of franchise establishments as well as franchise-related economic indicators, such as gross domestic product (GDP), employment (number of jobs and full-time equivalents), and tax revenue generated by franchises. These results are further broken down by province and selected industries across Canada.

## CANADIAN FRANCHISE INDUSTRY

The Canadian franchise industry is estimated to have almost 1,200 brands with at least one Canadian establishment and more than 75,000 franchise establishments across a variety of industry sectors. Over the past five years, the number of franchise brands with one or more Canadian establishment has grown 23% from 969 to 1,192 in 2018 and the number of Canadian establishments, both franchised and corporate, has increased by 4%, totalling 3,104 net new establishments over the same period.

**Figure 1** Number of brands and Canadian franchise establishments



Source: Canadian Franchise Association, 2018

## NATIONAL OUTLOOK

In 2019, the economic outlook of the Canadian franchise industry is estimated to grow by 2.59% (+\$2.5 billion net increase), increasing the total franchise-related GDP contribution to \$100.6 billion. As illustrated in Table 1, the total number of franchise establishments in Canada is projected to grow by 0.79% in 2019 to a total of 76,060 franchise establishments. Furthermore, the Canadian franchise industry’s contribution to federal and provincial tax revenue is estimated to increase by 2.95% (+\$477 million net increase) to \$16.7 billion and by 2.87% (+\$312 million net increase) to \$11.2 billion, respectively, in 2019.



Total franchise-related employment in the country is estimated to grow by 0.59% to 1.90 million jobs (1.57 million FTEs) in 2019 (equivalent to 11,000 net new jobs, 8,700 of which are directly due to franchises in 2019). This represents 4.61% of the new jobs that the Canadian economy, as a whole, is estimated to add in 2019, assuming a growth of 1.29% (equivalent to 243,000 new jobs). Growth in employment is consequently associated with a 2.59% increase in the total franchise-related wages to \$64.0 billion (a net increase of \$1.61 billion in wages over the coming year). Total franchise-related employment growth is primarily driven by full-time employment, which is estimated to increase by 0.74% (+10,600 net new jobs) to 1.35 million jobs while part-time employment is estimated to grow by 0.09% (+500 net new jobs) to 552,000.

**Table 1 National outlook for 2019**

Metric		2018	2019	% Change	
Number of franchise establishments		75,463	76,060	0.79%	
Direct franchise employment ('000s)	Jobs	Part-Time	461	461	0.10%
		Full-Time	1,016	1,024	0.81%
		Total	1,477	1,485	0.59%
	FTEs	1,200	1,207	0.59%	
Total franchise-related Employment ('000s)	Jobs	Part-Time	552	552	0.09%
		Full-Time	1,338	1,349	0.79%
		Total	1,890	1,901	0.59%
	FTEs	1,559	1,568	0.58%	
Direct Franchise GDP (\$ Billions)		\$65.5	\$67.2	2.59%	
Total franchise-related GDP (\$ Billions)		\$98.1	\$100.6	2.59%	
Total franchise-related tax revenue	Federal	\$16.2	\$16.7	2.95%	
	Provincial/Territorial	\$10.9	\$11.2	2.87%	

## PROVINCE AND TERRITORY OUTLOOK

At the provincial level, in absolute terms, Ontario is estimated to have the largest number of franchise establishments added (+264 net establishments, growth of 0.71%) to 37,378. However, the largest percent growth in franchise establishments is estimated to occur in British Columbia, where the number of franchise establishments is expected to increase by 1.16% (115 net establishments) to 10,083. Meanwhile, the lowest growth occurs in New Brunswick, where the number of franchise establishments is estimated to grow by 0.31% (3 net establishments) to 1,062.

A breakdown of the provincial and territory projections for the franchise industry is provided in Table 2 and Table 3.

Table 2 Provincial outlook for 2019: Franchise establishments, GDP and employment

	Franchise Establishments		Total Franchise-Related GDP		Total Franchise-Related Employment (FTEs)	
	Amount (\$ Billions)	% Change 2018 to 2019	Amount (\$ Billions)	% Change 2018 to 2019	Amount ('000s)	% Change 2018 to 2019
Alberta	8,954	0.93%	\$11.5	3.06%	177.8	1.04%
British Columbia	10,083	1.16%	\$13.7	3.78%	223.9	1.75%
Manitoba	2,116	0.78%	\$2.4	2.54%	38.7	0.53%
New Brunswick	1,062	0.31%	\$1.3	1.07%	20.7	-0.93%
Newfoundland and Labrador	718	0.58%	\$0.7	1.89%	11.8	-0.11%
Nova Scotia	1,440	0.36%	\$1.7	1.17%	29.6	-0.82%
Ontario	37,378	0.71%	\$50.6	2.32%	772.7	0.32%
Prince Edward Island	179	0.62%	\$0.2	1.88%	3.3	-0.07%
Quebec	11,975	0.73%	\$16.0	2.39%	254.7	0.38%
Saskatchewan	2,021	0.84%	\$2.2	2.76%	33.5	0.75%
Territories	134	0.78%	\$0.2	2.54%	1.6	0.53%
<b>Total</b>	<b>76,060</b>	<b>0.79%</b>	<b>\$100.6</b>	<b>2.59%</b>	<b>1,568</b>	<b>0.58%</b>

Table 3 Provincial outlook for 2019: GOS, wages and taxes

	Gross Operating Surplus		Wages		Taxation (Federal and Provincial)	
	Amount (\$ Billions)	% Change 2018 to 2019	Amount (\$ Billions)	% Change 2018 to 2019	Amount ('000s)	% Change 2018 to 2019
Alberta	\$4.36	3.06%	\$7.2	3.06%	\$3.04	3.41%
British Columbia	\$4.98	3.78%	\$8.7	3.78%	\$3.70	4.14%
Manitoba	\$0.90	2.54%	\$1.5	2.54%	\$0.92	2.88%
New Brunswick	\$0.54	1.07%	\$0.8	1.06%	\$0.54	1.41%
Newfoundland and Labrador	\$0.22	1.89%	\$0.5	1.89%	\$0.28	2.25%
Nova Scotia	\$0.55	1.17%	\$1.1	1.17%	\$0.72	1.53%
Ontario	\$18.30	2.32%	\$32.3	2.32%	\$13.4	2.68%
Prince Edward Island	\$0.10	1.86%	\$0.1	1.89%	\$0.08	2.20%
Quebec	\$5.60	2.39%	\$10.4	2.39%	\$4.31	2.74%
Saskatchewan	\$0.89	2.76%	\$1.3	2.76%	\$0.76	3.12%
Territories	\$0.16	2.54%	\$0.1	2.54%	\$0.07	2.73%
<b>Total</b>	<b>\$36.6</b>	<b>2.59%</b>	<b>\$64.0</b>	<b>2.59%</b>	<b>\$27.84</b>	<b>2.92%</b>

## SECTOR OUTLOOK

Table 4 provides an overview of the top franchise industry sectors (by the total franchise-related GDP in 2019) and the 2019 outlook across total franchise-related GDP and total franchise-related employment (FTEs). The Canadian franchise industry is projected to see relatively strong performance from the accommodation services sector, whose total franchise-related GDP is expected to increase 1.5 times more than the national average, by 3.77% (\$163 million net increase over 2018) and whose total franchise-related employment is expected to increase by 1.48% (2.5 times the national average). This industry is followed by the food services sector (+\$386 million net increase, growth of 3.65%), retail (+\$296 million net increase, growth of 2.66%) and commercial and residential services (+\$350 million net increase, growth of 2.64%). Meanwhile, printing and manufacturing is projected to be the slowest mover among the major industries with an expected increase in total franchise related GDP of 2.07%, and a decrease in employment (FTEs) of 0.13% in 2019.

**Table 4 Top sector outlook for 2018<sup>1</sup>**

	Total Franchise-Related GDP		Total Franchise-Related Employment (FTEs)	
	Amount (\$ Billions)	% Change 2018 to 2019	Amount ('000s)	% Change 2018 to 2019
Real Estate and Business Services	\$19.2	2.33%	103	0.07%
Food Services	\$11.0	3.65%	356	1.37%
Commercial and Residential Services	\$13.6	2.64%	222	0.36%
Retail	\$11.4	2.66%	259	0.40%
Arts, Health and Fitness	\$6.6	2.34%	129	0.11%
Printing and Manufacturing	\$5.5	2.07%	40	-0.13%
Other Services (except Public Administrative)	\$5.3	2.28%	107	0.03%
Accommodation Services	\$4.5	3.77%	147	1.48%
Construction	\$4.4	2.16%	38	-0.08%
Professional and Technical Services	\$4.0	2.12%	35	-0.10%
Information and Cultural Industries	\$3.0	2.10%	15	-0.10%
<i>Rest of Sectors</i>	<i>\$12.2</i>	<i>2.43%</i>	<i>117</i>	<i>0.16%</i>
<b>Total</b>	<b>\$100.6</b>	<b>2.59%</b>	<b>1568</b>	<b>0.58%</b>

<sup>1</sup> Refer to Figure 2 on the next page for an overview of industry sectors and the types of franchises that fall under each industry sector category.

## INDUSTRY SECTOR DESCRIPTIONS

Figure 2 below provides an overview of the North American Industry Classification System (NAICS) industry sectors and the types of franchises that fall under each sector category.

**Figure 2 Industry sector descriptions**

**Accommodation Services (NAICS 721)**

Hospitality Products / Services  
Hotels / Motels / Campgrounds

**Commercial and Residential Services (NAICS 56)**

Administrative and Support  
Commercial - Janitorial Services  
Employment / Personnel Services  
Environmental Products and Services  
Event Planning  
Fire Prevention / Safety & Security  
Furniture / Upholstery Repair  
Home - Inspection Services  
Home - Maid / Cleaning Services  
Janitorial & Maid Services  
Lawn & Garden Supplies / Services  
Remediation  
Security Systems & Services  
Travel  
Waste Management

**Arts, Health and Fitness (NAICS 71)**

Health / Fitness / Nutrition  
Sports / Recreation / Entertainment  
Weight Loss Services / Body Contouring

**Educational Services (NAICS 61)**

Educational Products & Services

**Real Estate and Business Services (NAICS 52-53)**

Business - Supplies / Equipment & Services  
Business Services / Office Space / Co-working Space  
Financial / Cash Services  
Insurance  
Leasing and Holding Companies  
Rental  
Real Estate

**Food Services (NAICS 722)**

Food - Baked Goods / Coffee / Donuts  
Food - Quick Service Restaurants  
Food - Restaurants / Dining Rooms

**Health Care (NAICS 62)**

Seniors Services / Home Care / Transition  
Social Assistance

**Information and Cultural Industries (NAICS 51)**

Magazines / Publishers

**Printing and Manufacturing (NAICS 31-33)**

Building & Design Services  
Commercial - Supplies / Equipment & Services  
Printing / Copying / Shipping  
Sign Products & Services  
Wine Making

**Other Services (except Public Administration) (NAICS 81)**

Automotive & Truck Services / Products / Rentals  
Beauty / Cosmetics / Supplies  
Dry Cleaning / Clothing Care  
Hair & Nail Salons / Spas  
Tanning Salons  
Other

**Professional and Technical Services (NAICS 54)**

Accounting / Tax Services  
Advertising / Marketing / Promotional Products & Services  
Business Consultants / Services / Training  
Computer / Software / Internet  
Legal  
Painting Services  
Photo Imaging / Photography  
Scientific

**Construction (NAICS 23)**

Custom Deck  
Home/Commercial Improvement / Renovation / Restoration

**Retail (NAICS 44-45)**

Children's Products & Services  
Commercial / Residential Services  
Food - Grocery / Specialty Shops/ Meal Assembly  
Home - Decorations / Furnishings  
Home Based Businesses  
Mobile Businesses  
Pets - Sales / Supplies / Services  
Retail

**Transport and Warehousing (NAICS 48-49)**

Consumer Buying Services  
Designated Driving / Transportation Services

**Utilities (NAICS 22)**

Water Treatment

## 2.0 FRANCHISE ESTABLISHMENTS

The Canadian franchise industry is projected to add 597 net new franchise establishments in the coming year, an increase of 0.79% over 2018 to 76,060 establishments. Ontario is estimated to have the largest number of franchise establishments added (+264 net increase, growth of 0.71%) to 37,378. This represents 44% of all new franchise establishments in Canada in 2018. Ontario is followed by British Columbia, projected to grow by 115 net establishments, resulting in a total of 10,083 establishments. British Columbia is also the province where the largest percentage growth in franchise establishments is expected to occur in 2019, at 1.16%. Quebec and Alberta are projected to have the third and fourth largest growth in number of franchise establishments, adding 87 (total of 11,975 and 0.73% growth) and 83 net establishments (total of 8,954 and 0.93% growth), respectively. Further provincial breakdowns are provided in Table 5.

**Table 5 Provincial franchise establishment growth**

	Franchise Establishments		
	2018	2019	% Change
Alberta	8,871	8,954	0.93%
British Columbia	9,968	10,083	1.16%
Manitoba	2,100	2,116	0.78%
New Brunswick	1,059	1,062	0.31%
Newfoundland and Labrador	714	718	0.58%
Nova Scotia	1,435	1,440	0.36%
Ontario	37,114	37,378	0.71%
Prince Edward Island	178	179	0.62%
Quebec	11,888	11,975	0.73%
Saskatchewan	2,004	2,021	0.84%
Territories	133	134	0.78%
<b>Total</b>	<b>75,463</b>	<b>76,060</b>	<b>0.79%</b>

### 3.0 GROSS DOMESTIC PRODUCT (GDP)

The total franchise-related GDP is estimated to be \$100.63 billion in 2019, a 2.59% increase over 2018. The direct GDP of Canadian franchises is estimated to be \$67.2 billion, a 2.59% increase over 2018, which represents 67% of the estimated total franchise-related GDP in 2019. Table 6 provides an overview of the direct and total franchise GDP growth projected for 2019 by the top ten industry sectors.

**Table 6 Top sector franchise GDP**

	Direct Franchise GDP (\$ Billions)			Total Franchise GDP (\$ Billions)		
	2018	2019	% Change	2018	2019	% Change
Real Estate and Business Services	\$12.2	\$12.5	2.19%	\$18.78	\$19.22	2.33%
Commercial and Residential Services	\$12.1	\$12.4	2.61%	\$13.24	\$13.59	2.64%
Retail	\$7.56	\$7.75	2.53%	\$11.12	\$11.42	2.66%
Food Services	\$9.8	\$10.1	3.62%	\$10.59	\$10.97	3.65%
Arts, Health and Fitness	\$6.05	\$6.19	2.32%	\$6.42	\$6.57	2.34%
Printing and Manufacturing	\$2.07	\$2.11	1.82%	\$5.37	\$5.48	2.07%
Other Services (except Public Administrative)	\$4.35	\$4.45	2.22%	\$5.17	\$5.28	2.28%
Accommodation Services	\$4.0	\$4.1	3.73%	\$4.34	\$4.50	3.77%
Construction	\$2.46	\$2.51	2.00%	\$4.29	\$4.39	2.16%
Professional and Technical Services	\$2.03	\$2.07	1.94%	\$3.96	\$4.04	2.12%
Information and Cultural Industries	\$1.16	\$1.19	1.86%	\$2.94	\$3.00	2.10%
<i>Rest of sectors</i>	<i>\$1.71</i>	<i>\$1.74</i>	<i>1.84%</i>	<i>\$11.88</i>	<i>\$12.16</i>	<i>2.43%</i>
<b>Total</b>	<b>\$65.5</b>	<b>\$67.2</b>	<b>2.59%</b>	<b>\$98.09</b>	<b>\$100.63</b>	<b>2.59%</b>

The primary driver of the growth in total franchise-related GDP growth in the Canadian franchise industry is the accommodation services industry, which is estimated to increase by 3.77% in 2019 to \$4.50 billion (+\$163 million from 2018). This is followed closely by the food services industry, which is estimated to increase by 3.65% in 2019 to \$10.97 billion (+\$386 million from 2018). Combined, these two industry sectors represents 22% of the total growth in the total-franchise related GDP. They are followed by the retail (+\$296 million, growth of 2.66%) and commercial and residential services (+\$350 million, growth of 2.64%).

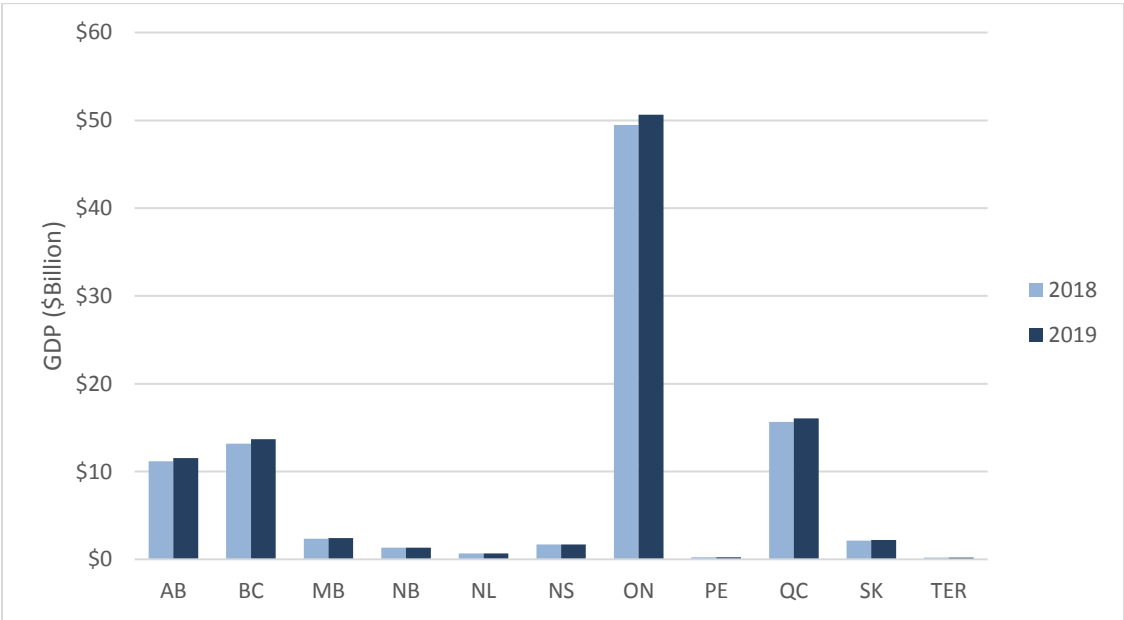
If we consider direct franchise GDP contributions (i.e. GDP that is generated through the operation of franchise establishments and not through indirect and induced effects), the top three industries with the largest direct GDP percentage growth in Canada are projected to be:

- Accommodation services, growing by \$149 million (+3.73%);
- Food services, growing by \$353 million (+3.62%); and
- Commercial and residential services, growing by \$316 million (+2.61%).

As a percentage of the total franchise-related GDP growth, direct GDP growth represents 92% for the accommodation and food services industries and 91% for the commercial and residential services industry. For the real estate and business services industry, direct GDP growth represents 65% of the total franchise-related GDP growth. The differences are due to the indirect and induced impacts within these industries which include the rent paid by many employees and franchisees.

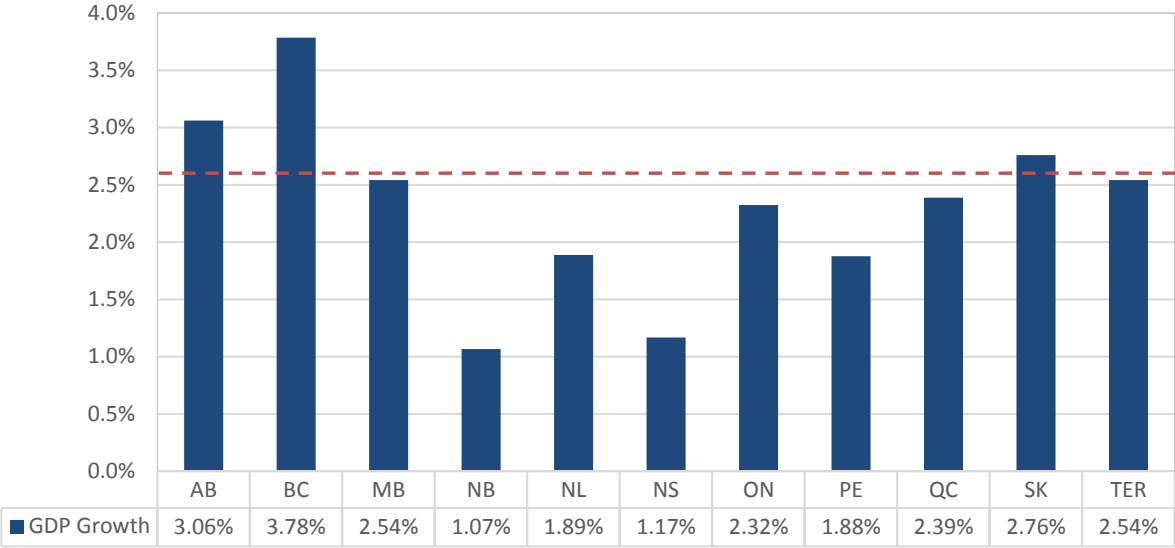
Figure 3 provides an overview of the change in total franchise-related GDP in the franchise industry between 2018 and 2019 by province. As evident below, the largest growth in total franchise-related GDP is projected to occur in Ontario (+\$1.15 billion, growth of 2.32%), followed by British Columbia (+\$499 million, growth of 3.78%) and then Quebec (+\$374 million, growth of 2.39%). Of all the provinces and territories, British Columbia, Alberta, and Saskatchewan are estimated to experience total franchise-related GDP growth above the national average of 2.59%.

**Figure 3 Provincial and territories total franchise-related GDP**



Of note, as illustrated in Figure 4 (with the national average of 2.59% represented by the red dotted line), the largest percentage growth in total-franchise related GDP is estimated to occur in British Columbia, with an increase of 3.78% (1.5 times greater than the national average), followed by Alberta (3.06%) and Saskatchewan (2.76%).

**Figure 4 Total franchise-related GDP growth**



Note: the red-dotted line represents the Canadian franchise industry national average GDP growth



**Table 7 Provincial franchise-related GDP outlook**

	Direct Franchise GDP (\$ Billions)			Total Franchise-Related GDP (\$ Billions)		
	2018	2019	% Change	2018	2019	% Change
Alberta	\$7.22	\$7.44	3.05%	\$11.2	\$11.5	3.06%
British Columbia	\$9.02	\$9.36	3.79%	\$13.2	\$13.7	3.78%
Manitoba	\$1.68	\$1.73	2.54%	\$2.36	\$2.42	2.54%
New Brunswick	\$1.00	\$1.01	1.01%	\$1.33	\$1.34	1.07%
Newfoundland and Labrador	\$0.46	\$0.47	1.89%	\$0.66	\$0.67	1.89%
Nova Scotia	\$1.22	\$1.24	1.16%	\$1.68	\$1.70	1.17%
Ontario	\$33.2	\$34.0	2.32%	\$49.5	\$50.6	2.32%
Prince Edward Island	\$0.17	\$0.17	2.03%	\$0.22	\$0.22	1.88%
Quebec	\$9.81	\$10.0	2.40%	\$15.7	\$16.0	2.39%
Saskatchewan	\$1.51	\$1.55	2.76%	\$2.13	\$2.18	2.76%
Territories	\$0.19	\$0.20	2.54%	\$0.21	\$0.21	2.54%
<b>Total</b>	<b>\$65.5</b>	<b>\$67.2</b>	<b>2.59%</b>	<b>\$98.1</b>	<b>\$100.6</b>	<b>2.59%</b>

## 4.0 EMPLOYMENT AND WAGES

The total franchise-related employment is projected to grow to 1.90 million jobs (1.57 million FTEs) in 2019, a 0.59% increase over 2018 and equivalent to 11,000 net new jobs. This represents 4.61% of the new jobs that the Canadian economy, as a whole, is estimated to add in 2019, with a growth of 1.29% (equivalent to 243,000 new jobs). Direct employment in Canadian franchises, representing 78% of the total franchise-related employment, is estimated to grow to 1.49 million jobs (1.21 million FTEs) in 2019, a 0.59% increase from 2018, and, equivalent to 11,000 net new jobs. Table 8 provides an overview of the direct and total franchise employment growth projected for 2019 by province.

**Table 8 Canadian franchise employment growth**

Provinces and Territories		Direct Franchise Employment			Total Franchise-Related Employment		
		2018 ('000s)	2019 ('000s)	% Change	2018 ('000s)	2019 ('000s)	% Change
Alberta	FTEs	136	138	1.03%	176	178	1.04%
	Jobs	168	170	1.03%	214	216	1.04%
British Columbia	FTEs	173	176	1.75%	220	224	1.75%
	Jobs	215	218	1.75%	269	274	1.75%
Manitoba	FTEs	31	32	0.53%	38	39	0.53%
	Jobs	39	39	0.53%	47	47	0.53%
New Brunswick	FTEs	17	17	-0.97%	21	21	-0.93%
	Jobs	21	21	-0.97%	25	25	-0.93%
Newfoundland and Labrador	FTEs	10	10	-0.11%	12	12	-0.11%
	Jobs	12	12	-0.11%	14	14	-0.11%
Nova Scotia	FTEs	24	24	-0.82%	30	30	-0.82%
	Jobs	30	29	-0.82%	36	36	-0.82%
Ontario	FTEs	591	593	0.32%	770	773	0.32%
	Jobs	723	726	0.32%	930	933	0.32%
Prince Edward Island	FTEs	3	3	0.03%	3	3	-0.07%
	Jobs	3	3	0.03%	4	4	-0.07%
Quebec	FTEs	186	187	0.39%	254	255	0.38%
	Jobs	230	231	0.39%	307	308	0.38%
Saskatchewan	FTEs	28	28	0.75%	33	34	0.75%
	Jobs	34	34	0.75%	41	41	0.75%
Territories	FTEs	1	1	0.53%	2	2	0.53%
	Jobs	2	2	0.53%	2	2	0.53%
Total	FTEs	1,200	1,207	0.59%	1,559	1,568	0.58%
	Jobs	1,477	1,485	0.59%	1,890	1,901	0.59%

Total franchise-related employment growth is primarily driven by full-time employment, which is estimated to increase by 0.79% (+10,600 net new jobs) to 1.35 million jobs while part-time employment is estimated to grow very slightly by 0.09% (+550 net new jobs) to 552,100. Table 9 further breaks down the employment growth across the provinces and territories by type of employment.

**Table 9 Canadian franchise employment growth by type of employment**

Provinces and Territories		Total Franchise-Related Employment		
		2018 ('000s)	2019 ('000s)	% Change
Alberta	Part-Time	63	63	0.53%
	Full-Time	151	153	1.25%
British Columbia	Part-Time	82	83	1.24%
	Full-Time	187	191	1.97%
Manitoba	Part-Time	14.3	14.3	0.03%
	Full-Time	32.7	33.0	0.75%
New Brunswick	Part-Time	7.5	7.4	-1.44%
	Full-Time	17.9	17.7	-0.72%
Newfoundland and Labrador	Part-Time	4.3	4.3	-0.61%
	Full-Time	10.1	10.1	0.10%
Nova Scotia	Part-Time	10.9	10.7	-1.32%
	Full-Time	25.5	25.3	-0.61%
Ontario	Part-Time	266	265	-0.18%
	Full-Time	664	667	0.52%
Prince Edward Island	Part-Time	1.3	1.3	-0.54%
	Full-Time	2.8	2.8	0.15%
Quebec	Part-Time	89	89	-0.12%
	Full-Time	218	219	0.59%
Saskatchewan	Part-Time	12.6	12.6	0.24%
	Full-Time	28.2	28.5	0.97%
Territories	Part-Time	0.62	0.62	0.03%
	Full-Time	1.31	1.32	0.77%
Total	Part-Time	552	552	0.09%
	Full-Time	1,338	1,349	0.79%

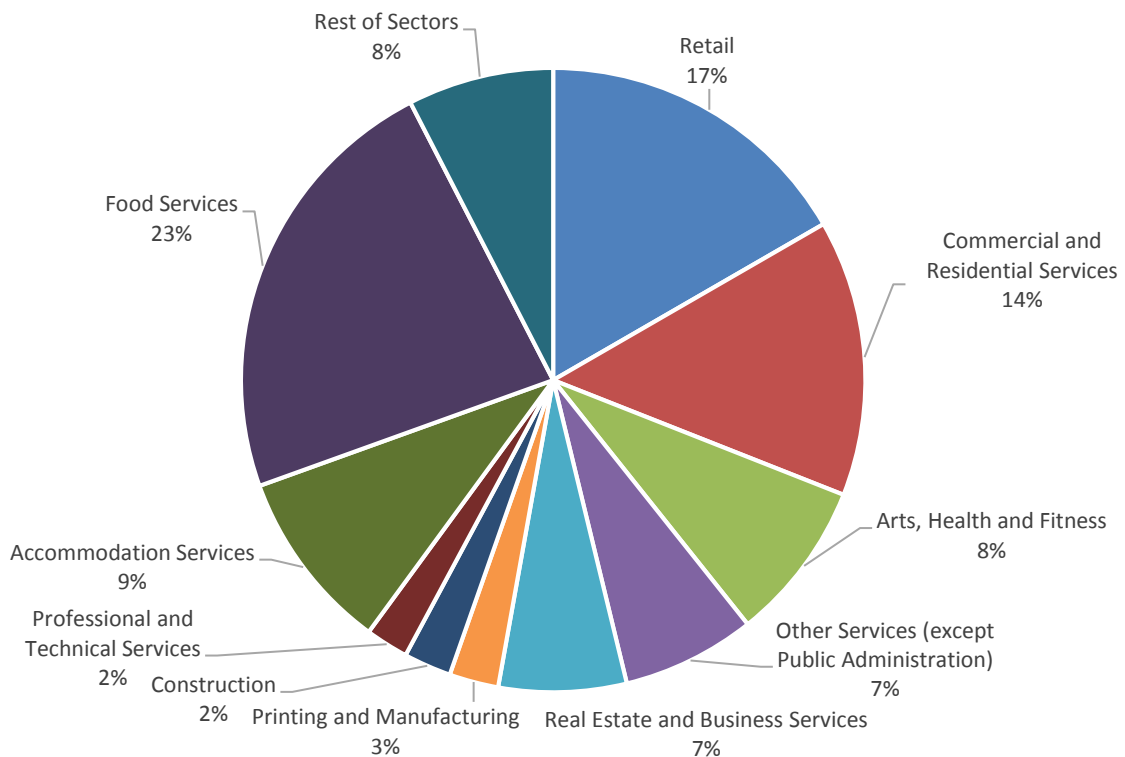
At the provincial level, in absolute terms, British Columbia is estimated to have the largest number of total-franchise related jobs added in 2019 (+4,710 new jobs, growth of 1.75%) to 274,000 jobs (224,000 FTEs). This represents 42% of the total franchise-related new jobs projected to be created in 2019. This projected

level of growth in franchise-related employment is the highest among all provinces and is three times the national average.

In terms of expected added jobs, British Columbia is followed by Ontario (+2,950 net new jobs, growth of 0.32%) and Alberta (+2,220 net new jobs, growth of 1.04%). New Brunswick (-240 net job decrease, decline of 0.93%), and Nova Scotia (-300 net job decrease, decline of 0.82%) are estimated to have a reduction in total franchise-related employment. These provinces are not growing (or are regressing) compared to other provinces and territories, given that they are experiencing low population growth. Therefore, there is less demand for net new franchise establishments (i.e., some franchises may close and new franchises may open, but net numbers are not changing as much as in other provinces).

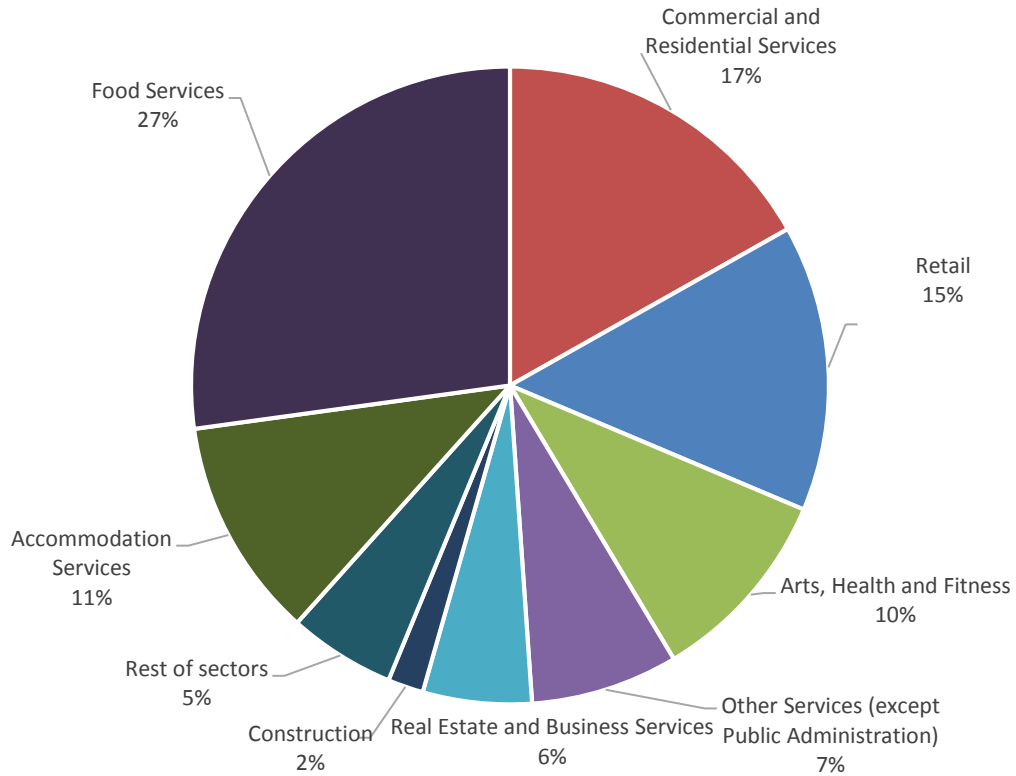
In terms of the industries that will contribute the most to the total franchise-related employment in 2019, the food services sector (23%) is projected to contribute the most, followed by retail (17%), and commercial and residential services (14%). Figure 5 provides a breakdown of the industries contributing to total franchise-related employment.

**Figure 5 Total franchise-related employment (FTEs) proportions**



In terms of direct franchise employment, the food services sector (27%) is projected to contribute the most, followed by commercial and residential services (17%), and retail (15%). A further breakdown is provided in Figure 6.

Figure 6 Direct franchise employment (FTEs) proportions



The aforementioned increase in employment is estimated to be associated with a 2.59% increase in the total franchise-related wages to \$64 billion in 2019. This is a projected net increase of \$1.61 billion in wages over the coming year. Table 10 provides a breakdown of the wage increases across the different provinces.

Table 10 Provincial total franchise-related wage growth

	Total franchise-related wages (\$ Billions)		
	2018	2019	% Change
Alberta	\$6.95	\$7.16	3.06%
British Columbia	\$8.39	\$8.70	3.78%
Manitoba	\$1.48	\$1.51	2.54%
New Brunswick	\$0.80	\$0.80	1.06%
Newfoundland and Labrador	\$0.44	\$0.45	1.89%
Nova Scotia	\$1.13	\$1.14	1.17%
Ontario	\$31.60	\$32.33	2.32%
Prince Edward Island	\$0.12	\$0.12	1.89%
Quebec	\$10.20	\$10.45	2.39%
Saskatchewan	\$1.26	\$1.29	2.76%
Territories	\$0.05	\$0.05	2.54%
<b>Total</b>	<b>\$62.4</b>	<b>\$64.0</b>	<b>2.59%</b>

## 5.0 GROSS OPERATING SURPLUS (GOS)

The total franchise-related GOS<sup>2</sup> is estimated to be \$36.6 billion in 2019, a 2.59% increase (+\$925 million net increase) over 2018. Table 11 provides an overview of the total franchise-related GOS growth projected for 2019 by province and territories. As illustrated below, the largest increase in total franchise-related GOS is projected to occur in Ontario (+\$415 million net increase, growth of 2.32%), followed by British Columbia (+\$182 million net increase, growth of 3.78%) and then Quebec (+\$130 million net increase, growth of 2.39%).

**Table 11 Provincial total franchise-related GOS growth**

	Total franchise-related GOS growth (\$ Billions)		
	2018	2019	% Change
Alberta	\$4.23	\$4.36	3.06%
British Columbia	\$4.80	\$4.98	3.78%
Manitoba	\$0.88	\$0.90	2.54%
New Brunswick	\$0.53	\$0.54	1.07%
Newfoundland and Labrador	\$0.22	\$0.22	1.89%
Nova Scotia	\$0.55	\$0.55	1.17%
Ontario	\$17.88	\$18.30	2.32%
Prince Edward Island	\$0.10	\$0.10	1.86%
Quebec	\$5.47	\$5.60	2.39%
Saskatchewan	\$0.87	\$0.89	2.76%
Territories	\$0.16	\$0.16	2.54%
<b>Total</b>	<b>\$35.7</b>	<b>\$36.6</b>	<b>2.59%</b>

The primary driver of the growth in total franchise-related GDP growth in the Canadian franchise industry is the accommodation services industry, which is estimated to increase by 3.86% in 2018 to \$1 billion (+\$37 million net increase from 2018). This is followed closely by the food services industry, which is estimated to increase by 3.75% in 2019 to \$2.46 billion (+\$89 million net increase from 2018). These industries are followed by retail (+\$71 million net increase, growth of 2.81%) and commercial and residential services (+\$118 million net increase, growth of 2.80%). Further breakdowns of the total franchise-related GOS growth by sector are provided in Table 12.

<sup>2</sup> Operating surplus is the return to capital of incorporated business. It consists of gross profits (including bad debts and charitable contributions) of corporations before income taxes, including capital consumption allowances, miscellaneous investment income, dividend pay net of dividend received, interest paid net of interest received, and inventory valuation adjustment. See full definition on the [Statistics Canada website](#).

Table 12 Sector GOS growth

	Total Franchise-Related GOS growth (\$ Billions)		
	2018	2019	% Change
Real Estate and Business Services	\$9.75	\$9.99	2.46%
Commercial and Residential Services	\$4.21	\$4.33	2.80%
Retail	\$2.53	\$2.60	2.81%
Food Services	\$2.37	\$2.46	3.75%
Arts, Health and Fitness	\$2.30	\$2.36	2.41%
Printing and Manufacturing	\$2.22	\$2.27	2.14%
Information and Cultural Industries	\$1.71	\$1.75	2.17%
Other Services (except Public Administrative)	\$1.50	\$1.53	2.40%
Professional and Technical Services	\$1.43	\$1.46	2.21%
Construction	\$1.39	\$1.42	2.28%
Accommodation Services	\$0.96	\$1.00	3.86%
<i>Rest of Sectors</i>	\$5.31	\$5.44	2.48%
<b>Total</b>	<b>\$35.7</b>	<b>\$36.6</b>	<b>2.59%</b>



## 6.0 TAX REVENUE

In 2019, the Canadian franchise industry is projected to generate a total of \$16.7 billion in federal taxation revenue (+\$477 million net increase, growth of 2.95%) and \$11.2 billion in provincial taxation revenue (+\$312 million net increase, growth of 2.87%). Table 13 provides a breakdown of the federal and provincial taxation revenue projected to be generated in 2019 by the Canadian franchise industry.

**Table 13 Federal and provincial taxation revenue generated**

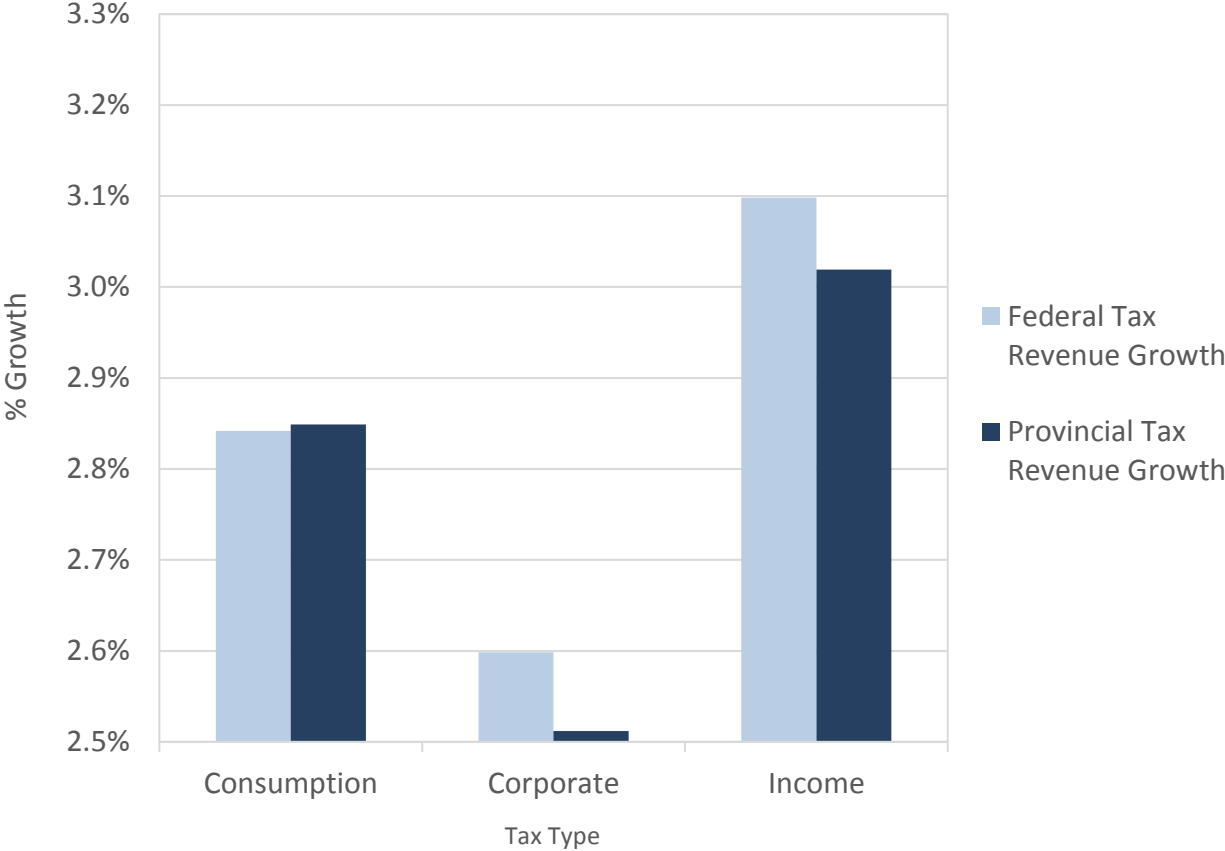
Province/Territories	Federal Taxation Revenue		Provincial Taxation Revenue	
	2019 (\$ Billions)	% Change	2019 (\$ Billions)	% Change
Alberta	\$1.90	3.41%	\$1.15	3.40%
British Columbia	\$2.28	4.14%	\$1.43	4.13%
Manitoba	\$0.40	2.90%	\$0.52	2.87%
New Brunswick	\$0.22	1.41%	\$0.32	1.41%
Newfoundland and Labrador	\$0.11	2.25%	\$0.17	2.25%
Nova Scotia	\$0.29	1.53%	\$0.43	1.53%
Ontario	\$8.38	2.68%	\$5.02	2.66%
Prince Edward Island	\$0.03	2.20%	\$0.05	2.20%
Quebec	\$2.68	2.75%	\$1.63	2.73%
Saskatchewan	\$0.35	3.10%	\$0.41	3.13%
Territories	\$0.03	2.73%	\$0.04	2.73%
<b>Total</b>	<b>\$16.7</b>	<b>2.95%</b>	<b>\$11.2</b>	<b>2.87%</b>

Given its size, Ontario's franchise industry generates the most federal tax revenue out of all provinces at \$8.38 billion (+\$219 million net increase, growth of 2.7%) and provincial tax revenue at \$5.02 billion (+\$130 million net increase, growth of 2.68%) in 2019. In relative terms, the growth in the taxation revenue contributed by franchises in British Columbia is estimated to be the largest of all the provinces and territories, with its federal tax revenue contribution growing by 4.14% (+\$91 million net increase) to \$2.28 billion and its provincial tax revenue contribution by 4.13% (+\$57 million net increase) to \$1.43 billion in 2019. The growth in the contributions of British Columbia's franchises to provincial tax revenue is 1.44 times the national average of 2.87%.

Figure 7 provides a breakdown of the growth in federal and provincial tax revenue contributed by the Canadian franchise industry in 2019. Within both levels of government, income tax revenue is the largest contributor and outgrows the other two tax revenue streams (growth is 1.2 times that of corporate tax revenue and 1.08 times consumption tax revenue growth). Expected growth in income tax is higher than that of consumption and corporate tax, because wages are a dominant factor of production for franchises.

Another contributing factor is that the number of franchise establishments is growing fastest in regions with higher income tax rates.

Figure 7 Federal and provincial tax revenue growth by component, 2018-2019



## 7.0 TRENDS

Year-over-year growth trends from 2017 to 2019 in the Canadian franchise sector suggest sustained or increased growth in franchise-related GDP and a slowdown in employment in 2019. The franchise-industry growth trends are presented by province in Table 14 and Table 15.<sup>3</sup>

Growth in number of franchise establishments is expected to be sustained or higher than in 2018 in all regions except the Territories. In British Columbia, 2019 growth appears strong at four times its previous year's growth. Franchise-related GDP is expected to be sustained or accelerate in 2019, primarily driven by increased profit prospects, with the exception of the Maritime Provinces, which are expected to see negative growth in franchise-related employment. Employment growth appears to be slowing generally, coming off the strong labour market conditions that were present in the previous year.

Growth in employment in every sector is expected to slow down considerably compared with growth levels seen in 2018 (see Table 16). This is expected to be slightly offset by increased operating margins to maintain a generally stable GDP contribution outlook.

**Table 14 Provincial Growth Trends, 2017-2019: Franchise Establishments, GDP and Employment**

	Franchise Establishments		Total Franchise-Related GDP		Total Franchise-Related Employment (FTEs)	
	% Change 2017-2018	% Change 2018-2019	% Change 2017-2018	% Change 2018-2019	% Change 2017-2018	% Change 2018-2019
Alberta	0.30%	0.93%	1.76%	3.06%	2.35%	1.04%
British Columbia	0.28%	1.16%	1.77%	3.78%	2.23%	1.75%
Manitoba	0.35%	0.78%	2.32%	2.54%	2.63%	0.53%
New Brunswick	0.18%	0.31%	2.51%	1.07%	2.71%	-0.93%
Newfoundland and Labrador	0.36%	0.58%	3.00%	1.89%	3.01%	-0.11%
Nova Scotia	0.36%	0.36%	2.54%	1.17%	2.84%	-0.82%
Ontario	0.27%	0.71%	1.86%	2.32%	2.40%	0.32%
Prince Edward Island	0.17%	0.62%	2.45%	1.88%	2.64%	-0.07%
Quebec	0.32%	0.73%	1.71%	2.39%	2.28%	0.38%
Saskatchewan	0.34%	0.84%	2.29%	2.76%	2.80%	0.75%
Territories	1.65%	0.78%	2.53%	2.54%	2.79%	0.53%
<b>Total</b>	<b>0.29%</b>	<b>0.79%</b>	<b>1.86%</b>	<b>2.59%</b>	<b>2.39%</b>	<b>0.58%</b>

<sup>3</sup> The percentage changes from 2017-2018 are based on end-of-year Statistics Canada estimates for the years 2017 and 2018 and represent realized growth, while the 2018-2019 percentage changes use CANCEA's 2019 projections.

Table 15 Provincial Growth Trends, 2017-2019: GOS, wages and taxes

	Gross Operating Surplus		Wages		Taxation (Federal and Provincial)	
	% Change 2017-2018	% Change 2018-2019	% Change 2017-2018	% Change 2018-2019	% Change 2017-2018	% Change 2018-2019
Alberta	1.58%	3.06%	1.88%	3.06%	2.08%	3.41%
British Columbia	1.82%	3.78%	1.74%	3.78%	2.03%	4.14%
Manitoba	2.25%	2.54%	2.35%	2.54%	2.62%	2.88%
New Brunswick	2.49%	1.07%	2.52%	1.06%	2.75%	1.41%
Newfoundland and Labrador	3.13%	1.89%	2.94%	1.89%	3.23%	2.25%
Nova Scotia	2.51%	1.17%	2.56%	1.17%	2.85%	1.53%
Ontario	1.70%	2.32%	1.95%	2.32%	2.13%	2.68%
Prince Edward Island	2.43%	1.86%	2.47%	1.89%	2.61%	2.20%
Quebec	1.67%	2.39%	1.73%	2.39%	1.95%	2.74%
Saskatchewan	1.89%	2.76%	2.57%	2.76%	2.65%	3.12%
Territories	2.45%	2.54%	2.74%	2.54%	2.68%	2.73%
<b>Total</b>	<b>1.75%</b>	<b>2.59%</b>	<b>1.93%</b>	<b>2.59%</b>	<b>2.16%</b>	<b>2.92%</b>

Table 16 Top Sector Growth Trends, 2017-2019

	Total Franchise-Related GDP		Total Franchise-Related Employment (FTEs)	
	% Change 2017-2018	% Change 2018-2019	% Change 2017-2018	% Change 2018-2019
Real Estate and Business Services	3.35%	2.33%	3.35%	0.07%
Food Services	2.71%	3.65%	2.71%	1.37%
Commercial and Residential Services	1.68%	2.64%	1.68%	0.36%
Retail	6.15%	2.66%	6.17%	0.40%
Arts, Health and Fitness	2.18%	2.34%	2.17%	0.11%
Printing and Manufacturing	2.60%	2.07%	2.60%	-0.13%
Other Services (except Public Administrative)	1.01%	2.28%	1.01%	0.03%
Accommodation Services	2.70%	3.77%	2.70%	1.48%
Construction	1.08%	2.16%	1.08%	-0.08%
Professional and Technical Services	-1.84%	2.12%	-1.84%	-0.10%
Information and Cultural Industries	2.93%	2.10%	2.87%	-0.10%
<i>Rest of Sectors</i>	-3.64%	2.43%	4.44%	0.16%
<b>Total</b>	<b>1.86%</b>	<b>2.59%</b>	<b>2.39%</b>	<b>0.58%</b>

## 8.0 CONCLUSIONS

In 2019, the economic outlook of the Canadian franchise industry is expected to grow by an estimated 2.59%, increasing its total franchise-related GDP contribution to \$100.6 billion.

Total franchise-related employment in the country is estimated to grow by 0.59% to 1.90 million jobs (1.57 million FTEs) in 2019 (an equivalent to 11,000 net new jobs, 8,700 of which are directly due to franchises in 2019). Total franchise-related employment growth is primarily driven by full-time employment, which is estimated to increase by 0.79% (+10,600 net new jobs) to 1.35 million jobs while part-time employment is estimated to grow by 0.09% (+500 net new jobs) to 552,000. Growth in employment is subsequently associated with a 2.59% increase in the total franchise-related wages to \$64.0 billion (a net increase of \$1.61 billion in wages over the coming year).

The increased GDP, employment, and associated wages will result in an estimated increase in federal and provincial taxation revenue contributed by the Canadian franchise industry of 2.95% and 2.87%, respectively. Federal tax revenue contributed by the franchise industry is estimated to reach \$16.7 billion, while provincial tax revenue contributed by the franchise industry is estimated to reach \$11.2 billion.

In terms of the provinces and territories, the largest growth in franchise-related GDP, wages, GOS and taxation revenue is estimated to occur in Ontario (due to the size of the economy). Of the 597 net new franchise establishments projected to be created country-wide in 2019, the largest share (44.2%) is expected to be located in Ontario. Total franchise-related GDP and wage growth in Ontario is estimated to grow by \$1.15 billion (growth of 2.32%) and \$734 million (growth of 2.32%), respectively. However, the province projected to add the largest number of franchise-related jobs (+4,700 net jobs or +3,900 FTE), as well as to see the most significant growth across all metrics in 2019, is British Columbia. British Columbia is estimated to outperform all other provinces and territories in terms of growth in franchise-related GDP (3.78%), employment (1.75%), wages (3.78%), number of establishments (1.16%), GOS (3.78%), and total taxation revenue (4.14%). Meanwhile, franchise-related employment in New Brunswick, Nova Scotia, Newfoundland and Prince Edward Island is expected to stagnate or decrease, leading to lower rates of growth in all other aforementioned metrics than the rest of Canada.

## APPENDIX A. GLOSSARY

<b>Agent</b>	An autonomous individual, firm or organization that responds to cues from other agents and their environment using a set of evidence-based behavioural rules in response to those cues.
<b>Agent-based modeling (ABM)</b>	A framework for modeling a dynamic system, such as an economy, by means of individual agents, their mutual interaction with each other, and their mutual interaction with their environment(s).
<b>Direct Impact</b>	The impacts directly involved in the operation of franchises. This includes income and value of production of economic agents (i.e., workers and firms) directly involved in a franchise.
<b>Employment (Full-time equivalents)</b>	Equivalent to person-years of employment, refers to the amount of work typically performed by one person working full-time for one year.
<b>Employment (Total)</b>	The number of employed residents living in a region, in a given year. These residents may work within their region of residence or may commute outside of the region to work.
<b>Franchisee</b>	An individual or organization that gets granted and holds the rights contained in the franchise agreement for the sale of goods or the operation of a service.
<b>Franchising</b>	Method of doing business in which one person, the franchisor, grants another, the franchisee, certain rights contained in the franchise agreement.
<b>Franchisor</b>	An individual or organization that grants the rights contained in the franchise agreement to a third party for the conducting of a business under their marks.
<b>Gross Domestic Product (GDP)</b>	The total unduplicated value of the goods and services produced in the economic territory of a country or region during a given period.
<b>Gross Operating Surplus</b>	Gross operating surplus is the surplus generated by operating activities after the labour factor input has been recompensed. It can be calculated from the value added at factor cost less the personnel costs. It is the balance available to the unit which allows it to recompense the providers of own funds and debt, to pay taxes and eventually to finance all or a part of its investment.
<b>Indirect Impacts</b>	The indirect effects are the economic impacts that arise through business to business interactions throughout the supply chain.
<b>Induced Impacts</b>	Induced effects are the economic activity created through increased spending of those workers receiving incomes from franchises. They can also occur due to reinvestment of business profits to expand capacity or replace depreciated capital stock. These purchases or activities can lead to further employment, wages, income, and tax revenue that reverberate throughout different industries.
<b><i>Prosperity at Risk (PaR)</i></b>	CANCEA's cutting-edge and innovative "big data" computer simulation platform that incorporates social, health, economic, financial, and infrastructure factors in an agent-based system.
<b>Systems approach</b>	The belief that in complex systems, the whole is not equal to the sum of its parts. Such an approach requires the understanding that different combinations of assets can have different values for agents and that agents have different constraints and desires, and cannot be treated as aggregates.
<b>System effects</b>	Impacts that transcend direct, indirect and induced effects, which are not traditionally measured by economics. These impacts arise from the relationship between every economic agent and the environment in which they operate, as they influence one another's states and behaviours.
<b>Taxation Revenue</b>	Tax collected by the provincial and federal governments and is made up of income, consumption, and corporate taxes.

## APPENDIX B. METHODOLOGY

The economic forecast of the Canadian franchise industry was conducted using CANCEA's Prosperity at Risk® (*PaR*) platform<sup>4</sup>. Using over 170 tables from Statistics Canada, including Statistics Canada input-output data (I/O), and over 56,000 Canadian Census dissemination areas, the Prosperity at Risk® platform takes into account the demand and supply of commodities across industry sectors and unifies it with demographics, labour force dynamics, government finances, private capital investment, and the interdependencies of production to allow for the Canadian franchises to be quantified and forecasted.

As the Prosperity at Risk® platform is an agent-based, event-driven microsimulation platform, it is capable of capturing the direct, indirect, and induced contributions, as well as identifying the contribution at different regional levels. By incorporating household behavior, industry and firm behavior, and federal and provincial tax rates, Prosperity at Risk® is capable of providing the economic impact across different economic indicators such as GDP (real and nominal), employment, wages, government revenue, and household income. Furthermore, Prosperity at Risk® also captures the "system impacts", which take the broader impact of franchises into consideration.

In addition to internal model validation, the output from the Prosperity at Risk® platform is regularly tested against the results of other models. Cross model validation ensures Prosperity at Risk® is producing baselines that are in accordance with other models. Key models include:

- Public sector forecasts including Ontario Ministry of Finance (e.g., population and GDP); and
- Private sector forecasts including major Canadian banks.

For more information on the Prosperity at Risk® platform and its applications, please refer to CANCEA (2017).

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<sup>4</sup> For an in-depth breakdown of CANCEA's Prosperity at Risk® platform, please refer to "The Economic Impact of Canadian P3 Projects" and the recent report on Bill 148: Fair Workplaces, Better Jobs Act, 2017 (The Canadian Centre for Economic Analysis 2016, 2017).

## APPENDIX C. BIBLIOGRAPHY

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