



BUSINESS  
*builders*

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INTERIM RESULTS  
PRESENTATION  
2020

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# AN INTRODUCTION TO FRANCHISE BRANDS PLC



- Established in 2008 by Stephen Hemsley (Executive Chairman) and Nigel Wray (Non-executive Director).
- Focused on building market-leading businesses in selected customer segments using primarily a franchise model.
- The Group currently has a combined network of 435 franchisees across five franchise brands in the UK.
- Organised into a B2B division and a B2C division.
- Highly experienced Board and senior management team who are significant shareholders (57%).
- Grown market capitalisation six-fold since AIM admission in August 2016.
- Organic growth and buy & build strategy.
- Profitable and cash generative.
- Progressive dividend policy with a track record of delivery since first full year as a listed business.

# FRANCHISE BRANDS: H1 AT A GLANCE

## B2B



Founded in 1983, commercial drainage specialist **Metro Rod** provides a range of drain clearance, repair and maintenance services. These services are provided on a 24/7/365 basis across the UK via 43 depots. Plumbing services are provided by **Metro Plumb** which has three independent franchisees.



Founded in 1997, **Willow Pumps** is a leading pump supply, installation and servicing business, with a below-ground and above-ground capability. The Group acquired Willow Pumps in 2019 to help expand Metro Rod's and Metro Plumb's range of services to the commercial market.

SYSTEM SALES

£19.7m

EBITDA\*

£1.5m

REVENUE

£6.2m

EBITDA\*

£0.8m

METRO ROD & METRO  
PLUMB FRANCHISEES

46

GROSS MARGIN

53%

## B2C



**ChipsAway, Ovensclean and Barking Mad** each provide a high level of service to retail customers of a similar cohort in the areas of car paintwork repairs, domestic oven cleaning and dog home boarding. All of our B2C brands are well established with a long trading history.

GROSS PROFIT

£1.97m

EBITDA\*

£0.9m

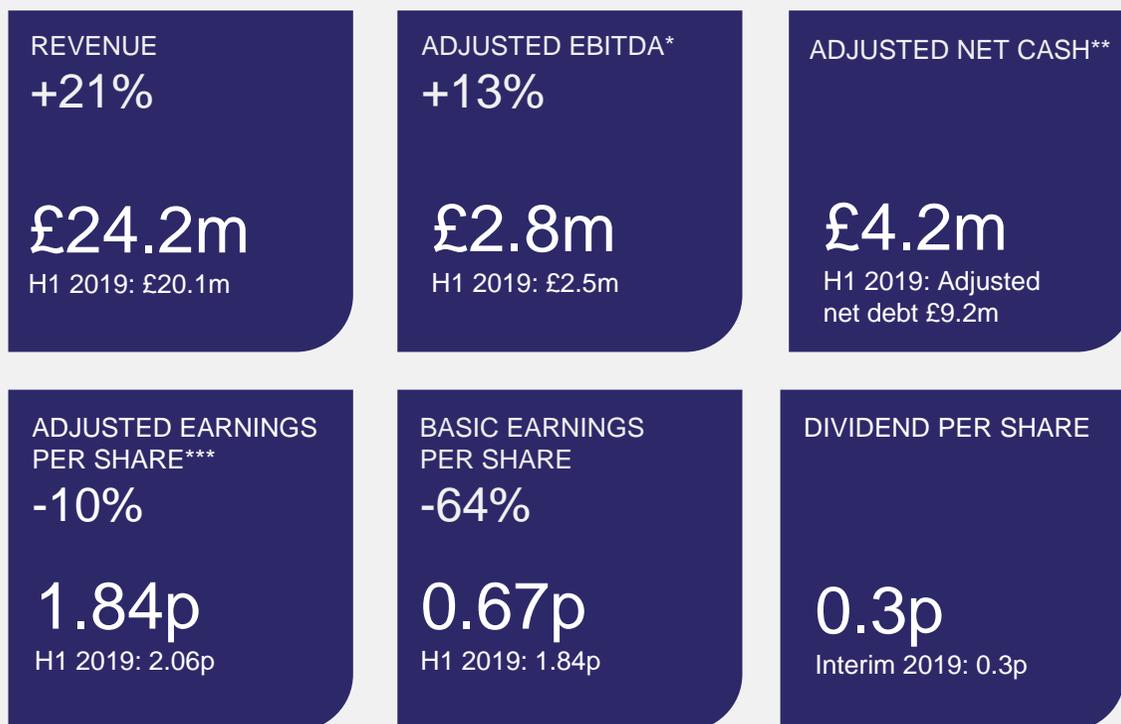
UK FRANCHISEES

389

\* EBITDA excludes Group overheads

# STRONG Q1, FOLLOWED BY RESILIENT LOCKDOWN PERFORMANCE AND RECOVERY IN JUNE

## 2020 HALF YEAR FINANCIAL HIGHLIGHTS

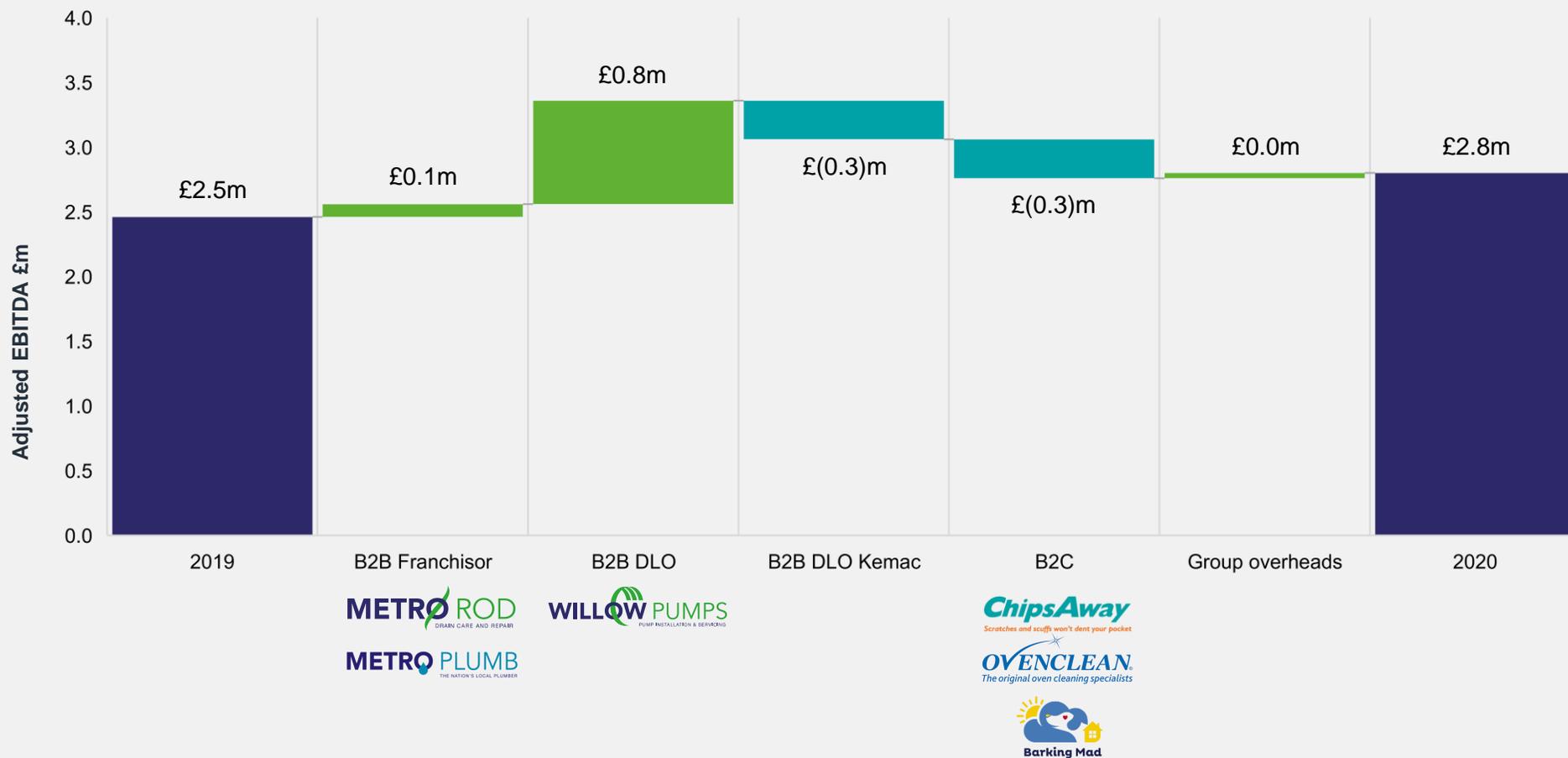


\*Adjusted EBITDA is earnings before interest, tax, depreciation, amortisation and share-based payment expense and COVID-19 related restructuring charge and bad debt provision. \*\* Adjusted net cash and debt are before capitalised leases under IFRS16. \*\*\*Adjusted EPS is earnings per share before amortisation of acquired intangibles, share-based payment expense, and COVID-19 related restructuring charge and bad debt provision.

## OPERATIONAL HIGHLIGHTS

- Strong Q1, followed by decreased trading during the COVID-19 lockdown, with signs of recovery in June.
- B2B division provides key workers to essential services, and traded through the period. Increased activity in June as businesses re-opened.
  - Metro Rod system sales grew by 16% year-on-year in Q1; resilient performance with 3% decline in H1 (H1: growth of 15%).
  - 28 of our 43 Metro Rod franchisees achieved y-on-y growth in sales in H1.
  - Successful start to the rollout of our new Metro Rod works management system.
  - Strong start to the year at Willow Pumps which contributed revenue of £6.2m in H1
- B2C division resumed trading in June 2020; strong restart at Chips Away.
- B2C franchise recruitment of 18 in Q1 and 9 in June 2020 (H1 2019: 34).

# THE 2020 INTERIM RESULTS: AT A GLANCE



## OUR B2B DIVISION PROVIDES KEY WORKERS TO ESSENTIAL SERVICES

- Metro Rod, Metro Plumb, Willow Pumps: provide a “Water In. Waste Out” range of drainage, plumbing and pumps services.
- 67% of the Group’s 2019 Adjusted EBITDA\* on a pro-forma basis.
- The majority of B2B services were designated by the Government as essential.
- Key priority is the safety of our team members, engineers, customers and the public.
- Trading in April and May was challenging, but progressive month on month improvement as economy remobilised.
- Increased activity in June and July as businesses re-opened.



**KEEPING BRITAIN'S  
WASTE AND WATER  
FLOWING**

**METRO ROD**  
DRAIN CARE AND REPAIR

**METRO PLUMB**  
THE NATION'S LOCAL PLUMBER

**WILLOW PUMPS**  
PUMP INSTALLATION & SERVICING

\*Excluding group overheads

# METRO ROD HAS TRADED RESILIENTLY THROUGH THE CRISIS

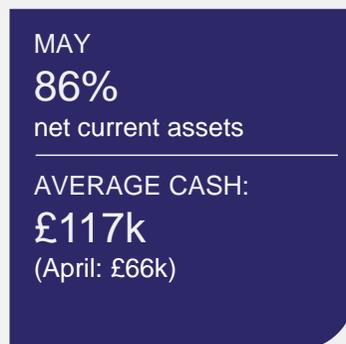
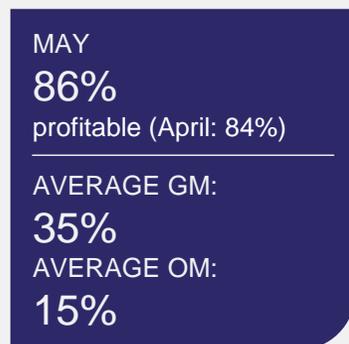


- Strong Q1 for system sales, followed by decreased trading during lockdown with signs of recovery in June and July:
  - Q1: growth of 16% y-o-y
  - April and May: 70% of 2019 levels
  - June: 88% of 2019 levels
  - July job lead intake to date: 93% of 2019 levels
- Prior IT investment contributed to seamless transition to remote operations following lockdown. Strict cost control with 40% of Support Centre staff furloughed.
- Considerable support to franchisees during the crisis who responded with real entrepreneurial spirit:
  - 28 of our 43 Metro Rod franchisees achieved y-o-y growth
  - 2 new franchisees joined the network in H1
- Good progress has been made on the completion of development of new works management system, a key part of our Vision 2023 strategy. Now rolled out to 42% of the network.
- Metro Plumb traded well due to the resilient nature of its principal activity of emergency work. Opportunity to broaden the customer base and grow the brand.
- Kemac traded well during the period with an improvement in underlying trading.

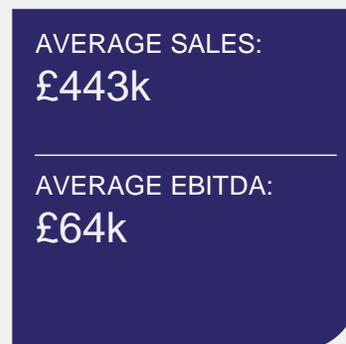


# OVERALL THE METRO ROD NETWORK MAINTAINED PROFITABILITY AND BALANCE SHEET STRENGTH DURING LOCKDOWN

## MONTH OF MAY



## 2020 YTD



## ROLLING 12-MONTHS



- We have received 37 out of 43 sets of May management accounts from our network.
- Overall improvement in profit and cash from April to May.
- Profit up by 7%, despite 1% fall in sales.
- Number of loss-making franchisees fell from 6 to 5 (only 2 made losses in both months).
- Cash increased considerably as franchisees cut costs using the furlough scheme but received full payments from the Support Centre.

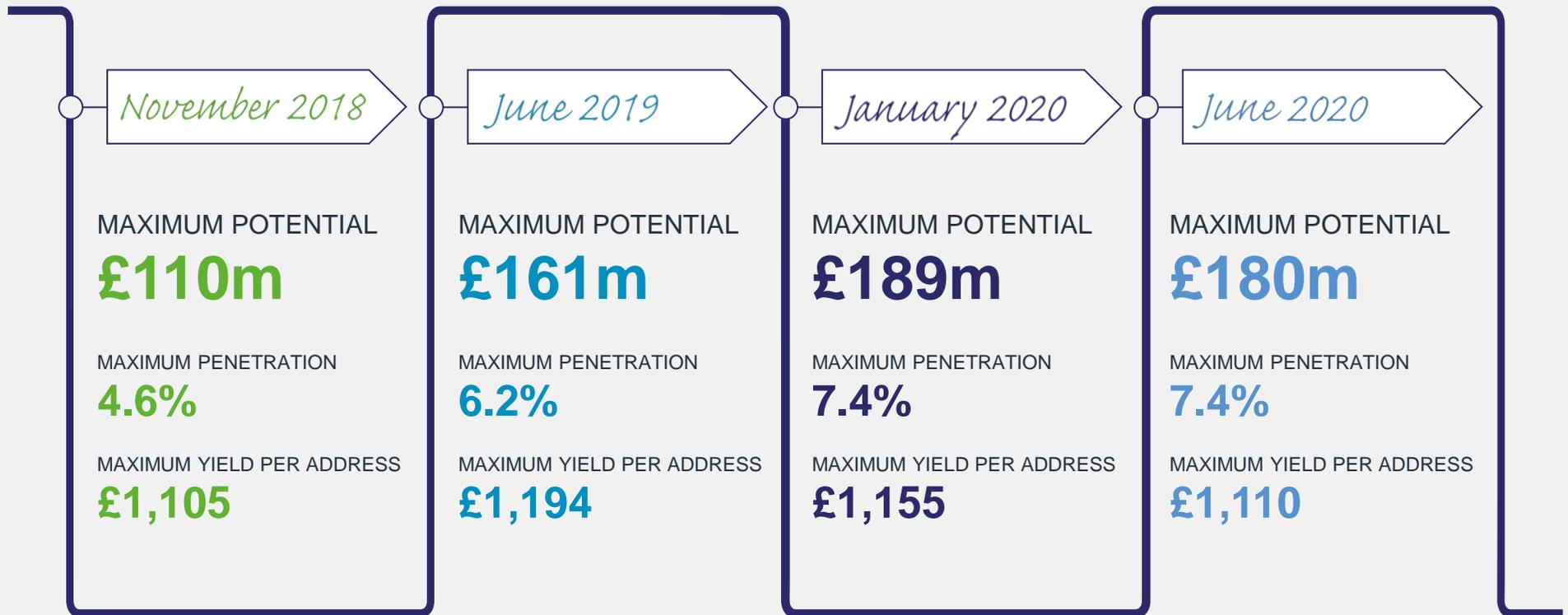
# ORGANIC GROWTH BEING DRIVEN BY EXPANDING METRO ROD'S RANGE OF SERVICES



- Expanding the range of services that Metro Rod franchisees can offer is a key part of our Vision 2023 strategy.
- Excellent progress has been made over the past 2 years in expanding the tanker capability of the network through financial incentives (since May 2019), finance and specialist support.
- Since 2018, the number of tankers has increased from 24 to 46. 12 franchisees have more than one tanker, and four have more than three.
- Since May 2019, the proportion of monthly sales accounted for by tanker sales has more than doubled, from 5.4% of monthly system sales to 11.5%.
- There is a significant opportunity with pumps to expand the range of services further. Pump sales are currently negligible.
- We acquired Willow Pumps, a market leader, to enable us to enter this specialist market at scale.



# THE MAXIMUM POTENTIAL OF THE SYSTEM HAS INCREASED WITH THE EXPANSION OF THE RANGE OF SERVICES



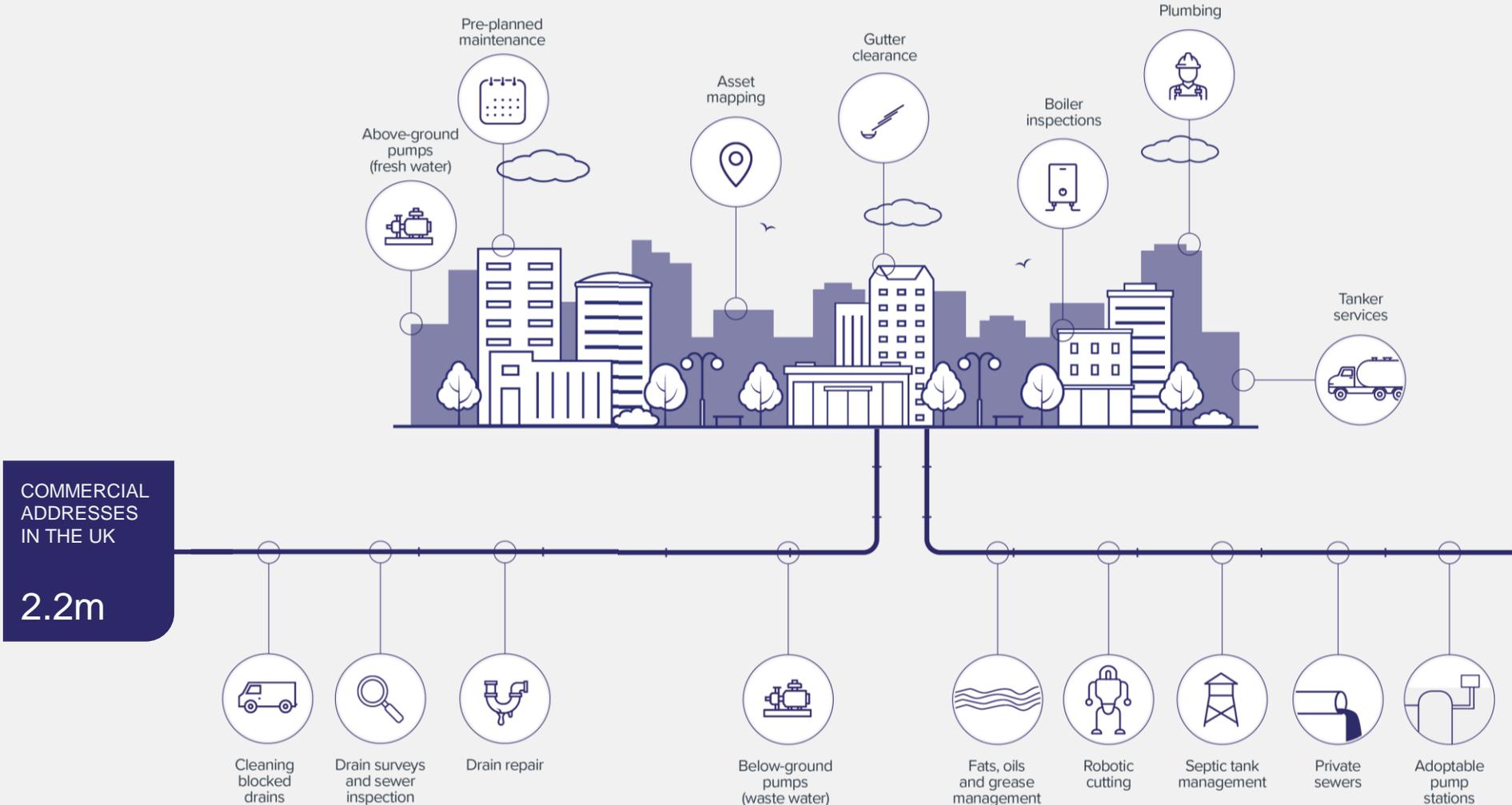
Data based on rolling 12 month periods

# WILLOW PUMPS, ACQUIRED IN OCTOBER 2019, MADE AN INAUGURAL CONTRIBUTION TO PROFITS IN H1



- Willow Pumps had a strong start to the year. Q1 also saw it assume responsibility for the Metro Rod Kent & Sussex corporate franchise which was integrated into the Willow Pumps business.
- Following that successful transfer, the last corporate franchise in Exeter was transferred to Willow Pumps in May, as a basis for expansion in the South West.
- Swift action taken at start of lockdown to right-size the business with 36% of staff furloughed.
- Pump service and repair work for essential service providers such as supermarkets remained resilient during the crisis while two key customer sectors (hotels and construction) were closed entirely during lockdown.
- New capability established which allows Willow Pumps to design pump stations in house. End-to-end service an important competitive advantage and activity has already gained traction.

# OUR AMBITION IS TO OFFER A “WATER IN. WASTE OUT.” SERVICE TO THE COMMERCIAL SECTOR



# THE B2C DIVISION: RELATIVE STRENGTH FROM CHIPSAWAY



- Good start to the year with recruitment at ChipsAway particularly strong.
- Lockdown significantly impacted the B2C division as services provided are not essential.
- 85% of the team were furloughed and franchisee fees and charges, other than those necessary to maintain skeleton operations, reduced or suspended.
- Notwithstanding significant drop in income, the B2C division traded at break-even during lockdown.
- The B2C brands are recovering at different speeds:
  - ChipsAway (83% of divisional income in 2019) recommenced trading in June, with both franchisee trading and franchise recruitment recovering strongly.
  - Ovensclean recovering more slowly while consumers have been cautious regarding non-essential tradesmen.
  - Barking Mad is still well below pre-COVID 19 levels due to heavy dependency on the foreign holiday market. We have restructured Barking Mad, integrating all its operations into the B2C overhead at Kidderminster.

\* EBITDA excludes Group overheads

# THE B2C DIVISION: 1H AT A GLANCE



FRANCHISEES  
RECRUITED IN 1H2020

23

FRANCHISEES LEAVING  
IN 1H2020

21

FRANCHISEES

207

GROSS PROFIT

£1.6m



FRANCHISEES  
RECRUITED IN 1H2020

2

FRANCHISEES  
LEAVING IN 1H2020

13

FRANCHISEES

101

GROSS PROFIT

£0.2m



FRANCHISEES  
RECRUITED IN 1H 2020

2

FRANCHISEES  
LEAVING IN 1H2020

8

FRANCHISEES

81

GROSS PROFIT

£0.2m

DIVISIONAL GROSS PROFIT

£2.0m

DIVISIONAL OVERHEAD

£1.1m

DIVISIONAL EBITDA\*

£0.9m

MARKETING | FRANCHISE RECRUITMENT | FINANCE | TECHNOLOGY

\* EBITDA excludes Group overheads

# SUMMARY OF GROUP RESULTS

Period Ending 30 June		H1 2020 £'000	H1 2019 £'000	Change £'000	Change %
<b>Statutory revenue</b>	<b>A</b>	<b>24,209</b>	20,084	4,125	21%
Franchise payments		<b>(9,488)</b>	(9,493)	5	0%
<b>Fee income</b>	<b>B</b>	<b>14,721</b>	10,591	4,130	39%
Other cost of sales		<b>(5,146)</b>	(3,147)	(1,999)	64%
<b>Gross profit</b>		<b>9,576</b>	7,444	2,132	29%
Administrative expenses		<b>(6,793)</b>	(4,984)	(1,809)	36%
<b>Adjusted EBITDA</b>	<b>C</b>	<b>2,782</b>	2,460	322	13%
Depreciation	<b>D</b>	<b>(666)</b>	(317)	(349)	110%
Finance expense	<b>E</b>	<b>(262)</b>	(159)	(103)	65%
<b>Adjusted profit before tax</b>		<b>1,854</b>	1,984	(130)	-7%
Tax expense		<b>(286)</b>	(389)	103	-27%
<b>Adjusted profit after tax</b>	<b>F</b>	<b>1,568</b>	1,595	(27)	-2%
Amortisation of acquired intangibles		<b>(196)</b>	(108)	(88)	82%
Share based payment		<b>(102)</b>	(100)	(2)	2%
<b>COVID-19 Related Costs</b>	<b>G</b>	<b>(620)</b>	-	(620)	100%
Acquisition-related costs		<b>(53)</b>	-	(53)	100%
Tax on adjusting items		<b>(26)</b>	40	(66)	-165%
<b>Statutory profit after tax</b>		<b>570</b>	1,427	(857)	-60%

- A** • Revenue increased by 21% to £24.2m (H1 2019: £20.1m) including contribution from Willow Pumps acquisition (like-for-like revenue was £18.0m (H1 2019: £20.1) due to the effects of the COVID-19 lockdown).
- B** • Fee income, which better reflects our income as franchisor, increased by 39% to £14.7m, including inaugural contribution from Willow Pumps
- C** • Adjusted EBITDA increased by 13% to £2.8m.
- D** • Depreciation increased to £0.6m:
  - Acquisition of Willow Pumps.
  - Purchase of equipment at Metro Rod corporate franchises.
- E** • Finance charge of £0.4m increased 4%, reflecting increase of debt following the acquisition of Willow Pumps.
- F** • Overall, adjusted earnings decreased by 2% to £1.6m.
- G** • COVID-19 related provision for expected credit losses, office closure and redundancies.

# FEE & DIRECT LABOUR INCOME

Period Ending 30 June		H1 2020 £'000	% of Total	H1 2019 £'000	% of Total	Change £'000	Change %
<b>MSF income</b>	<b>A</b>	5,323	36%	5,401	51%	(78)	-1%
<b>Sale of franchise territories</b>	<b>B</b>	723	5%	908	9%	(185)	-20%
<b>Product sales</b>		324	2%	460	4%	(136)	-30%
<b>Direct labour</b>	<b>C</b>	7,966	54%	3,202	30%	4,764	149%
<b>National advertising funds</b>	<b>D</b>	384	3%	620	6%	(236)	-38%
<b>Fee &amp; direct labour income</b>		<b>14,721</b>		<b>10,591</b>		<b>4,130</b>	<b>39%</b>

- A** • Strategically important MSF income increased by 7% at Metro Rod, but limited trading at our B2C division caused overall MSF to decrease by 1%.
- B** • Fees generated from the sale (or resale) of franchise territories fell 20% due to virtual cessation during lockdown.
  - B2C division: 18 recruits in Q1 and 9 in June; 27 in total for H1 (2019: 34).
- C** • Direct labour income increased as a result of the acquisition of Willow Pumps (£6.2m). Kemac declined as large one-off contract in H1 2019 was not matched in the current year.
- D** • National advertising funds are funded and run on behalf of our franchise networks. Although they form a component of income, the Group does not make any profit from these activities.

# INDIVIDUAL BUSINESS RESULTS

## EBITDA BY BUSINESS

		H1 2020 £'000	H1 2019 £'000	Change £'000	Change %
B2B- Franchisor	<b>A</b>	1,452	1,379	72	5%
B2B- DLO	<b>B</b>	888	345	543	157%
B2C	<b>C</b>	893	1,225	(332)	-27%
Group overheads		(451)	(489)	39	-8%
Group EBITDA	<b>D</b>	2,782	2,460	322	13%

- A** • B2B- Franchisor delivered an EBITDA contribution of £1.5m in the period, an increase of 5%:
  - Slight fall in system sales of 3%.
  - MSF up by 7% due to weighting towards sales attracting full rate of 22.5%.
- B** • B2B DLO increased as a result of the inclusion of Willow Pumps for the first time, but negatively impacted by the fall in profit at Kemac as a result of the fall in turnover.
- C** • B2C decreased 27% in the period to £0.9m due to decreased franchise fees and no recruitment during lockdown.
- D** • Group EBITDA increased 13% to £2.8m. The results reflect the use of the furlough scheme (£0.5m) and temporary staff pay-cuts (£0.2m).

# ADJUSTED EPS AND DIVIDEND

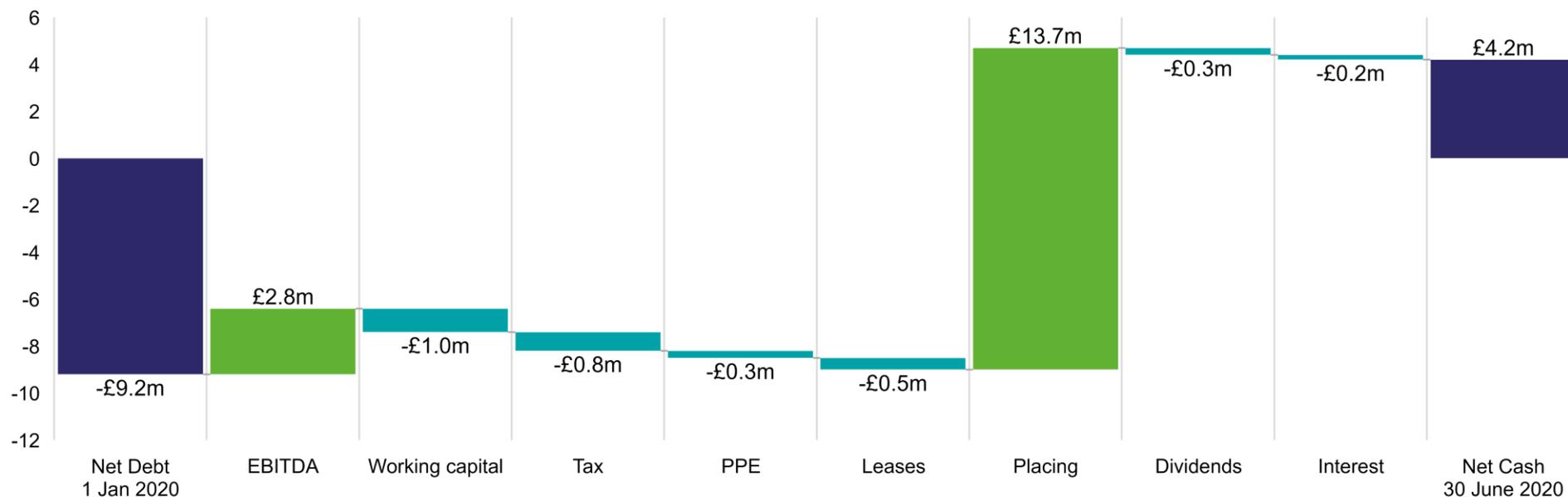
## GROWTH IN EPS AND DIVIDEND (P)



■ Dividend

- Adjusted EPS decreased by 10% to 1.84p from 2.06p:
  - Adjusted Earnings decrease of 2%.
  - Weighted average number of Ordinary Shares has increased from 77.9m to 85.0m as a result of the Placing of 15.6m Ordinary Shares.
  - At the end of the period, the total number of Ordinary Shares outstanding was 95,720,375.
- The Board is cautiously optimistic for the full year and given the strong cash position following the Placing has declared an interim dividend at the same level as 2019 of 0.30 pence per share.
- Board's longer-term intention to continue with our progressive dividend policy.

## MOVEMENT IN ADJUSTED NET DEBT



- April Placing raised £13.6m (net).
- Investment in working capital due to extended payment terms to our commercial customers, meaning debtor days have increased from 69 to 77.
- Group has moved from a net debt to a net cash position of £4.2m.
- Investment in PPE deferred until H2

# BALANCE SHEET

Year ended 31 December	30 June 2020 £'000	31 Dec 2019 £'000	Change £'000	Change %
<b>Property, plant and equipment</b>	<b>4,486</b>	<b>4,781</b>	<b>(295)</b>	<b>-6%</b>
Intangible assets	34,444	35,507		
Deferred tax liability	(1,139)	(1,544)		
<b>Accounting assets</b>	<b>33,305</b>	<b>33,513</b>	<b>(208)</b>	<b>-1%</b>
Inventories	692	730		
Trade and other receivables <b>B</b>	13,442	16,518		
Trade and other payables <b>C</b>	(8,109)	(12,404)		
Current tax liability	(722)	(594)		
Provisions	(3,659)	(3,606)		
<b>Net working capital</b> <b>D</b>	<b>1,644</b>	<b>644</b>	<b>1,000</b>	<b>155%</b>
Gross debt	(9,265)	(12,761)		
Cash	11,820	1,682		
<b>Statutory net debt</b> <b>A</b>	<b>2,555</b>	<b>(11,079)</b>	<b>13,634</b>	<b>-123%</b>
<b>Net assets</b>	<b>41,989</b>	<b>27,859</b>	<b>14,130</b>	<b>51%</b>

- A** • Statutory net cash position of £2.6m (31 Dec 2019: net debt £11.1m).
- Placing of 15.6m new Ordinary Shares to raise a net £13.6m.
  - Repayment of outstanding RCF but retaining Term Loan of £6.1m.
  - Unutilised bank facilities of £11m.
  - Total of £22.8m of available facilities as at 30 June 2020.
- B** • Trade debtors have fallen as sales have decreased. We have made a £0.5m expected credit loss provision - down from £1.3m at the time of the Placing. Our debtor days have increased from 69 to 77 as we have extended terms to our customers
- C** • We have continued to pay our creditors, including our franchisees within terms, and as our costs have decreased the overall level of trade creditors has fallen.
- D** • Overall, we have been required to invest an extra £1m in working capital.

## ACQUISITIONS UPDATE



- The short-term focus of the Group will be the resumption of the organic growth achieved prior to the lockdown, which will be significantly assisted by the strengthened capital structure provided by the recent Placing.
- We also remain receptive to earnings-enhancing acquisitions that expand the range of services offered by Metro Rod and Willow Pumps in pursuit of our ambition to offer a full “Water In. Waste Out” range of drainage, pumps and plumbing services.
- In the B2C division, acquisitions that allow the Group to leverage its existing divisional infrastructure are in scope.
- However, we are cautious about acquiring smaller B2C franchise businesses until we have visibility of both franchisees’ and franchisors’ longer-term viability following the COVID-19 crisis.

## SUMMARY & OUTLOOK

- The second half of the year has started well.
- In particular, with the opening up of the hospitality and retail sectors, we have continued to see a return to levels of trading in the B2B division similar to 2019.
- In the B2C division, ChipsAway is leading the recovery both in terms of franchise activity and recruitment. The other B2C brands, which make a far smaller contribution, are expected to be slower to recover.
- As activity levels improve further, we will bring back from furlough more of our people and return people to full pay, a process we anticipate will be completed across the business by the end of August.
- The outlook for the year is dependent on how quickly the remaining restrictions are eased by the Government and the pace and shape of the economic recovery.
- We remain cautiously optimistic for the full year. The Group has a robust balance sheet, strong underlying brands, motivated franchisees, and dedicated team members. This gives us both the opportunity and resources to grow both organically and through acquisition.
- As such, we are well placed to take advantage of the post-pandemic recovery.





# Appendix



# THE GROUP'S FRANCHISE SYSTEMS\*

## AS AT 30 JUNE 2020

	Network size 31 December, 2019	New franchisees recruited in 1H 2020		Franchisees leaving the system in 1H 2020		Net new franchisees in 1H 2020	Network size 30 June, 2020
B2C	404	27	+	(42)	=	(15)	389
Metro Rod	42	2	+	(1)	=	1	43
Metro Plumb**	3	1	+	(1)	=	0	3
<b>Total</b>	<b>449</b>	<b>30</b>	<b>+</b>	<b>(44)</b>	<b>=</b>	<b>(14)</b>	<b>435</b>

\*All figures relate to UK franchisees

\*\* Independent franchisees

# OUR BOARD

**Stephen Hemsley**



Executive Chairman

**Chris Dent**



Chief Financial Officer

**Peter Molloy**



Managing Director, Metro Rod

**Tim Harris**



Managing Director, B2C Division

**Julia Choudhury**



Corporate Development Director

**Colin Ross**



Chief Information Officer

**Nigel Wray**



Non-executive Director

**David Poutney**



Non-executive Director

**Rob Bellhouse**



Non-executive Director

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## OUR SENIOR TEAM

Ian Lawrence



Managing Director,  
Willow Pumps

Andrew Mallows



Commercial Director

Robin Auld



Group Marketing Director

Rachel Stewart



Deputy Managing Director,  
B2C

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[www.barkingmad.uk.com](http://www.barkingmad.uk.com)  
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