



DOMINO'S

INVESTOR DAY PRESENTATION - OCTOBER 10, 2019

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK



DOMINO'S

PRESENTED BY
DON MEIJ

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

THE **CORNERSTONE** OF THE COMPANY'S **SUCCESS** HAS BEEN
THE ABILITY TO **LEVERAGE A DIVERSIFIED NETWORK** OF BOTH
CORPORATE AND **FRANCHISED** STORES

BACKED BY **STRONG STORE LEVEL ECONOMIC FUNDAMENTALS**
AND THE **POWER** AND **PROPRIETARY SYSTEMS** OF A **GLOBAL**
NETWORK.

THE COMPANY PLANS TO **CONTINUE ITS EXPANSION** THROUGHOUT **AUSTRALIA** AND **NEW ZEALAND** AND EXPECTS THAT **DOMINO'S PIZZA** AND ITS **FRANCHISEES** WILL CONTINUE TO **BENEFIT** FROM **THE ECONOMIES OF SCALE** GENERATED BY OPERATING THE **LARGEST PIZZA NETWORK IN AUSTRALIA.**

**FUTURE GROWTH IS EXPECTED FROM NEW STORE OPENINGS,
GROWTH IN SALES FROM EXISTING STORES AND THE
POTENTIAL FOR NEW STORE AND MENU FORMATS.**

DOMINO'S PIZZA AUSTRALIA NEW ZEALAND LTD SHARE OFFER - **2004**

A wide-angle photograph of a sunset over the ocean. The sky transitions from a deep blue at the top to a bright orange near the horizon. The water is calm, reflecting the colors of the sky. In the distance, a lighthouse is visible on the horizon. The overall mood is serene and contemplative.

**OUR VIEW HASN'T CHANGED,
BUT OUR HORIZONS HAVE.**

THIS IS A **SCALE BUSINESS**

YOU CAN'T HAVE **20 OR 30 STORES.**

IT'S LIKE A **100 STOREY BUILDING,**
THE FIRST 50 OR 60 STOREYS **PAY FOR THE CONSTRUCTION,**

IT'S WHEN YOU HAVE THOSE FOUNDATIONS IN PLACE
THAT YOU **DELIVER THE REAL RETURNS.**



A long-exposure photograph of a city street at night. The street is wet and reflects the lights from buildings and street lamps. A tram track runs down the center of the street. On the left, the Royal Exchange building is visible, with a sign that reads "ROYAL EXCHANGE". A person is walking on the sidewalk. The sky is dark, and the overall atmosphere is vibrant and urban.

**IN EVERY MARKET OF THE WORLD, WE KNOW:
PROXIMITY, AND LOCATION, MATTERS.**



CUSTOMERS DON'T CARE ABOUT LINES ON MAPS



62
STORES

SALES

MORE THAN TREBLED

131
STORES



AUSTRALIA

WESTERN AUSTRALIA
SOUTH AUSTRALIA
GREAT VICTORIA DESERT
NULLARBOR PLAIN

QUEENSLAND
TASMANIA

Perth
Adelaide
Brisbane
Sydney

Perth
Adelaide
Brisbane
Sydney

Swain Reefs
Whitsunday Island
Mackay

BROADER HORIZONS



NEW ZEALAND

BELGIUM

NETHERLANDS

FRANCE

GERMANY

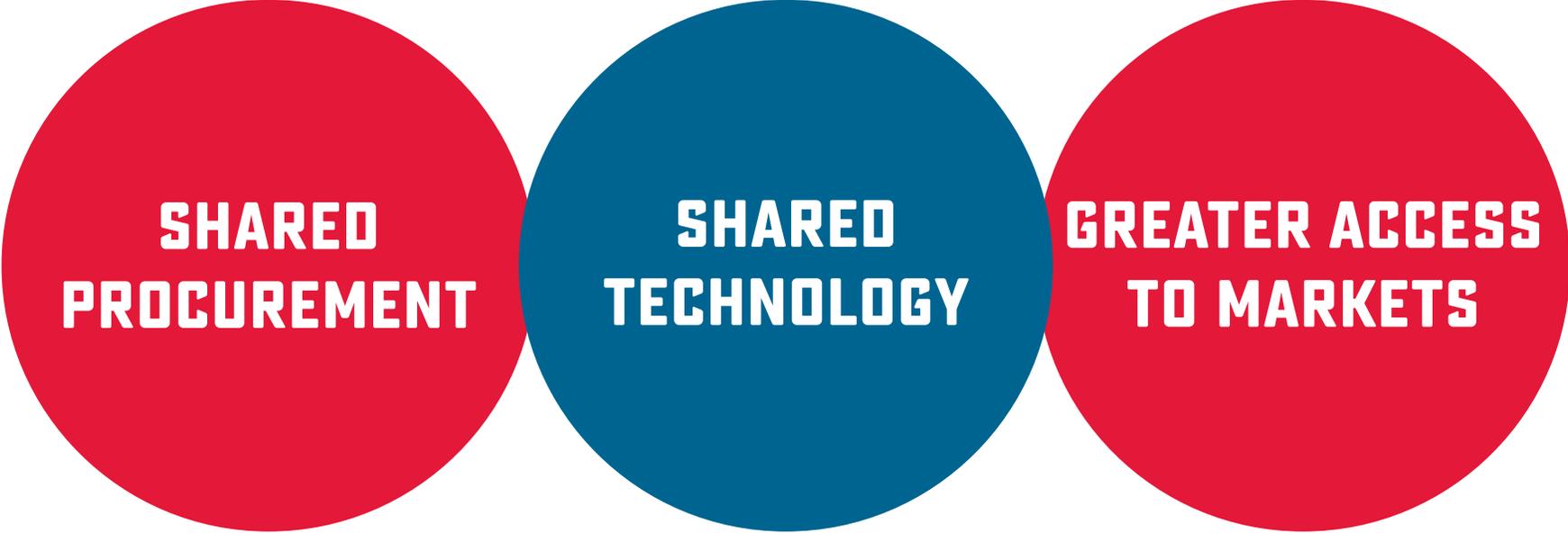
JAPAN



BUT STILL, WE VIEWED A TIME WHEN OUR
RUNWAY FOR GROWTH COULD **RUN OUT.**







OUR FUTURE



1X
GDP CHINA

+1X
POP USA

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

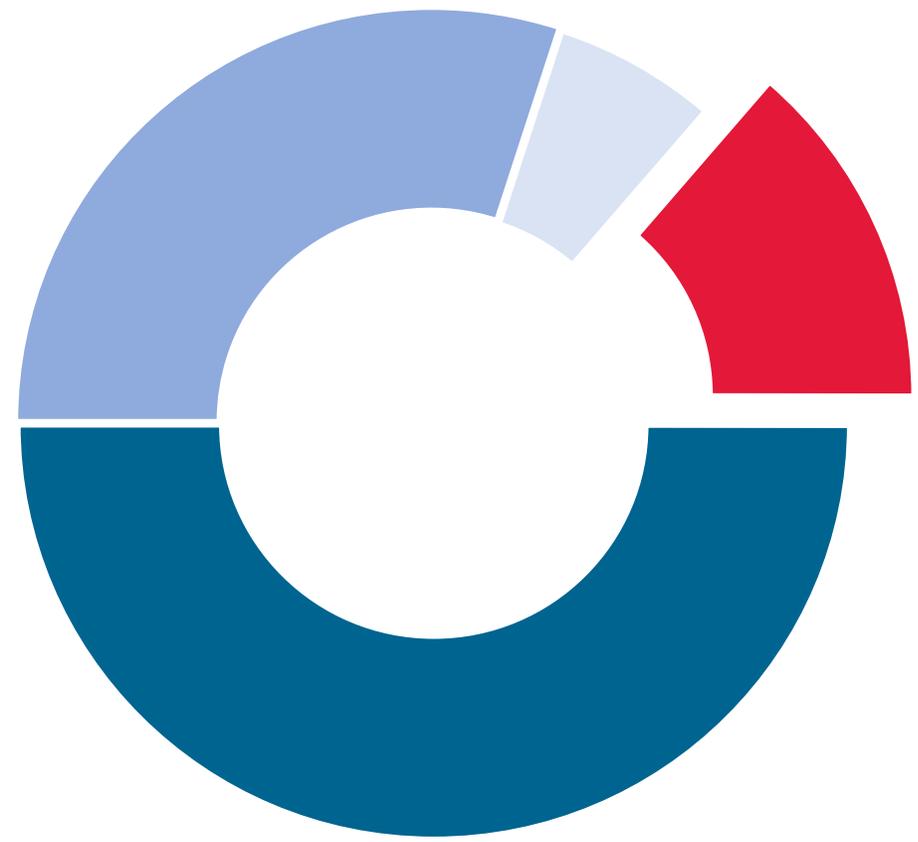
GERMANY

LUXEMBOURG

DENMARK



THE POSSIBILITY



■ BURGERS ■ CHICKEN ■ PIZZA ■ OTHER



OUR FUTURE

WHY DO WE EXIST?

THE **HARD-WIRED HUMAN NEED FOR SOCIAL CONNECTION** – SEEMINGLY BETTER ENABLED THAN EVER BEFORE – **IS BREAKING DOWN.**

PEOPLE CRAVE BELONGING, WHILE THEY ASSERT THEIR **RIGHT TO BE DIFFERENT.**

AT OUR BEST

WE SMASH THE PREVAILING WISDOM WHICH SAYS YOU CAN'T HAVE QUALITY, SPEED AND LOW PRICE...

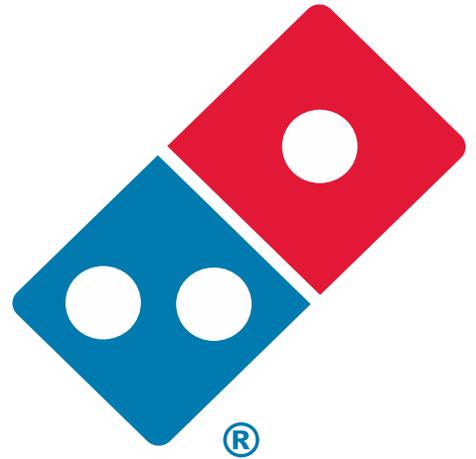
THUS PUTTING **THE WORLD'S MOST DELICIOUS AND VERSATILE BONDING FOOD** WITHIN REACH OF **EVERY PERSON.**





**OUR PIZZA
BRINGS PEOPLE
CLOSER**

**ONE BRAND,
ONE CORE FOCUS,
ONE PURPOSE.**



THE **GROWTH IN THE HOME PIZZA MARKET WILL CONTINUE** AS
A RESULT OF **LONGER WORKING DAYS** AND THE INCREASE IN
DUAL CAREER HOUSEHOLDS SUPPORTING DEMAND FOR
FRESHLY COOKED, DELIVERED FOOD

DOMINO'S PIZZA AUSTRALIA NEW ZEALAND LTD SHARE OFFER - **2004**



TIME IS THE
ENEMY OF FOOD

CUSTOMERS SEE A DIFFERENCE!

TIME OUT OF THE OVEN



5 MINUTES

10 MINUTES

15 MINUTES

20 MINUTES

25 MINUTES

30 MINUTES

35 MINUTES

40 MINUTES

45 MINUTES

50 MINUTES

“FRESH”

“OLD AND COLD”

AUSTRALIA

5:27

FERNY GROVE
AUG 2019

AUSTRALIA

4:58

EATONS HILL
SEP 2019

NETHERLANDS

3:36

GRONINGEN FLORESSTRAAT
JUL 2018

JAPAN

2:38

YOTSUYA
NOV 2018



AUSTRALIA
7:20
EATONS HILL
MONTH OF SEP 2019





TODAY, YOU'RE GOING TO HEAR FROM **MEMBERS OF OUR GLOBAL LEADERSHIP** ON HOW WE'RE GOING TO APPLY OUR **DEEP HISTORY OF FORTRESSING OUR BUSINESS TO BUILD SCALE** IN THE DECADES AHEAD.





DOMINO'S EUROPE

ANDRE TEN WOLDE - COO EUROPE

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

DPE EUROPE

BENELUX

DENMARK

185,000,000 CONSUMERS
[THAT'S 55% OF ALL CONSUMERS IN DPE'S MARKETS]

FRANCE

GERMANY

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

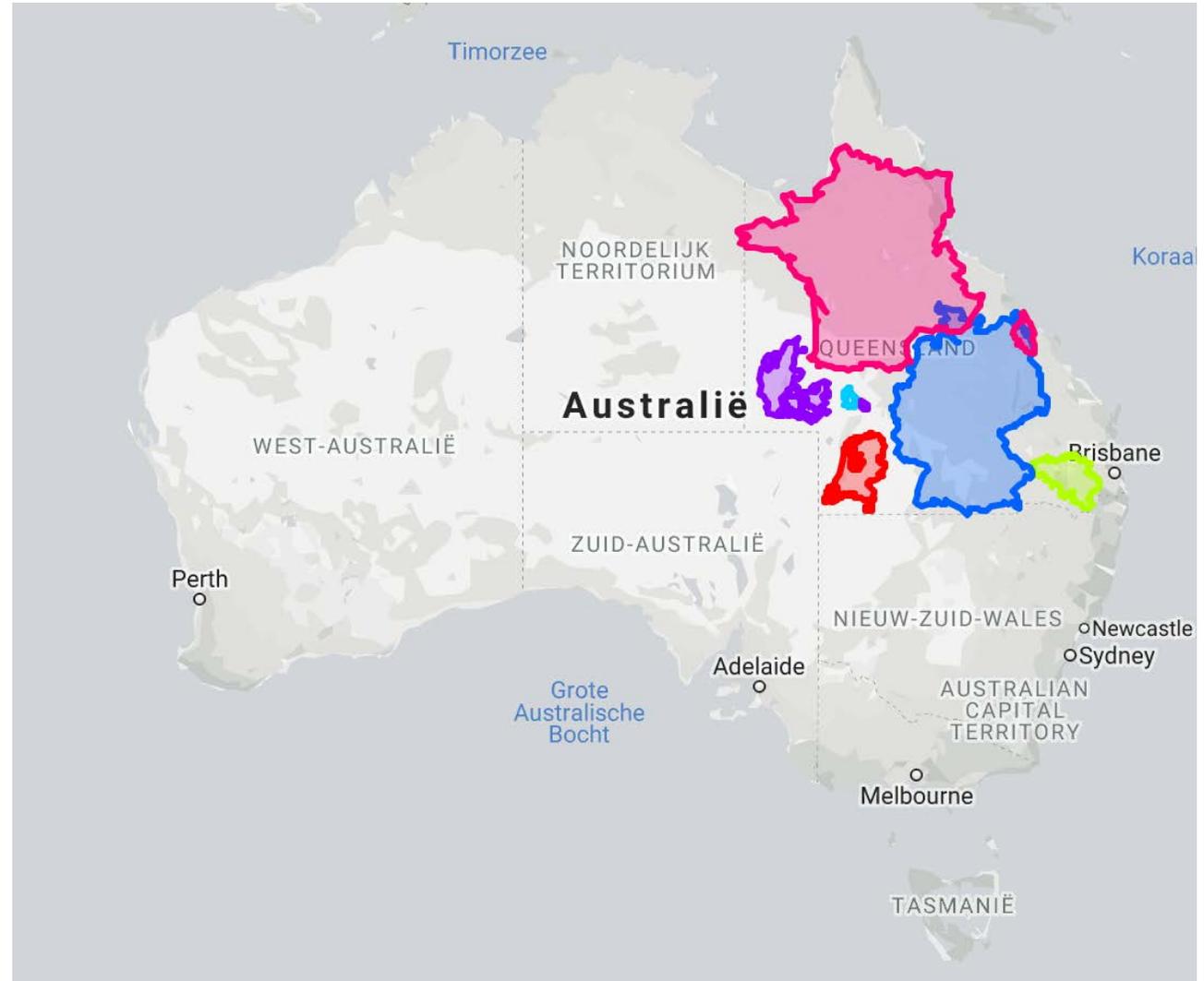
LUXEMBOURG

DENMARK



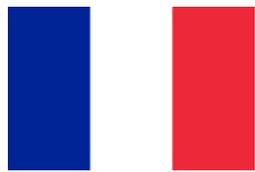
OPE EUROPE

- **59% OF THE SIZE OF QUEENSLAND**
- **1,097 STORES**
- **186,500 INHABITANTS PER STORE**
- **€ 713 MILLION IN NETWORK SALES**
- **65% DIGITAL**
- **CLOSE TO 3 STORES PER FRANCHISEE**



Source:<https://thetruesize.com>





THE FRENCH LOVE PIZZAS

2ND LARGEST MARKET IN THE WORLD
LA FRANCE EST LE 2ÈME PAYS AU MONDE QUI
CONSOMME LE PLUS DE PIZZAS, APRÈS LES ÉTATS-UNIS

FRANCE IS THE 2ND COUNTRY IN THE WORLD THAT CONSUMES THE MOST PIZZA, AFTER THE UNITED STATES



USA
13KG/AN

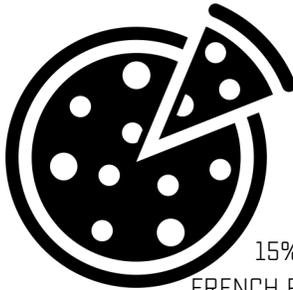


France
10kg/an



ITALIE
5KG/AN

7.7M
EAT PIZZAS
AT LEAST
ONCE PER WEEK



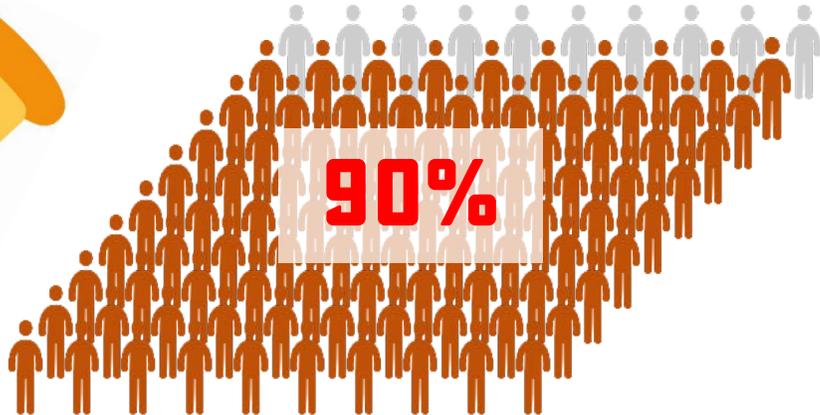
15% OF THE
FRENCH POPULATION
OVER 15 YO

26 PIZZAS

EATEN PER
SECOND
IN FRANCE



819 MILLION
PIZZAS
SOLD PER YEAR



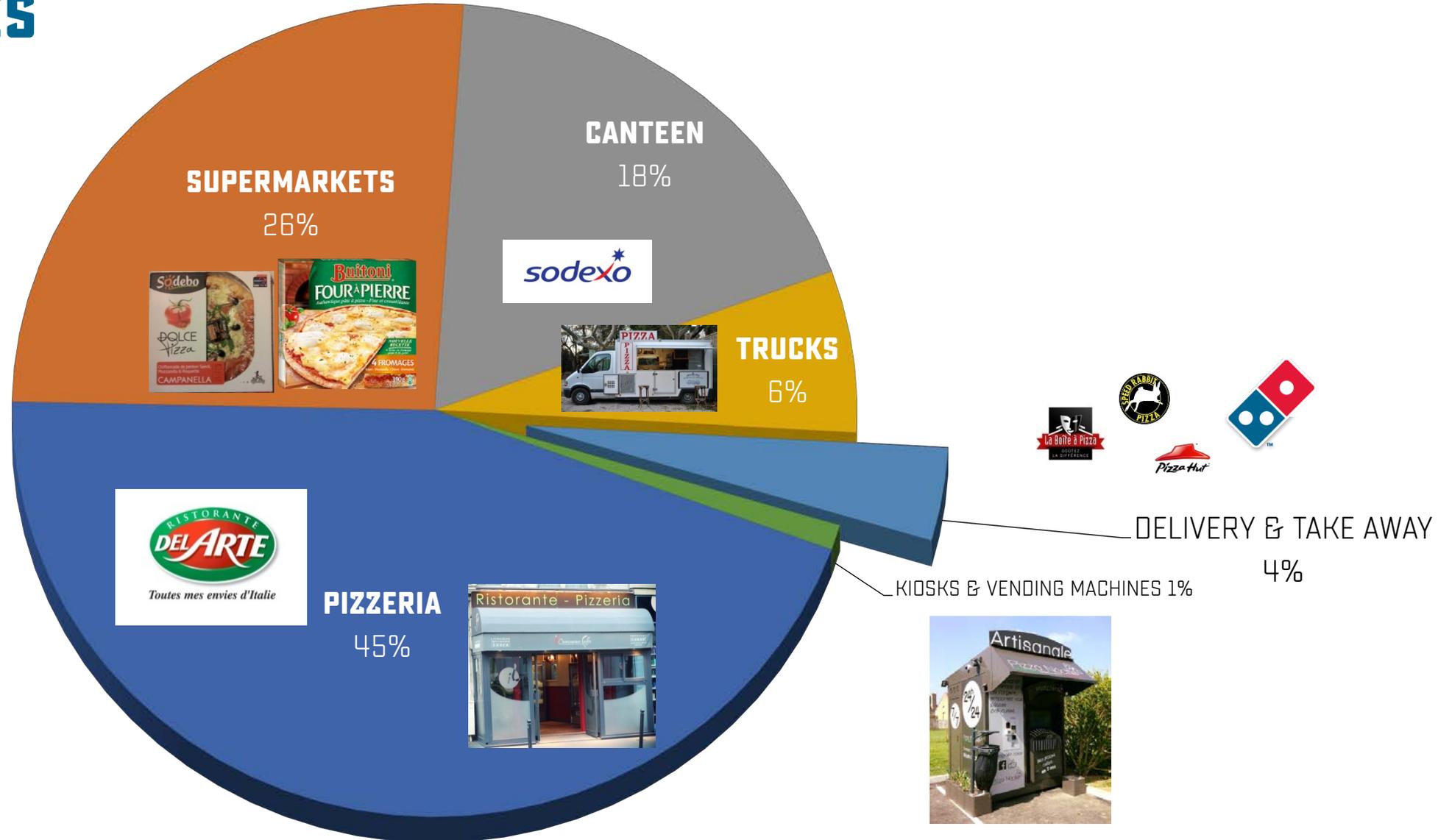
90% OF THE FRENCH POPULATION
OVER 15 YEARS OLD EAT PIZZA

PIZZA: PART OF THE CULTURE FOR MORE THAN 125 YEARS

- **1851** : Start of the Italian Immigration in France
 - 2 million Italians crossed the borders between 1873 and 1914.
- **1891**: 1st Pizzerias in Marseille :
 - 14 years before the 1st Pizzeria in New York
 - 70 Years before Milan and the north of Italy and 60 Years before Australia.
- **1950**: Pizzas accessible in all big cities in France
- **1962**: Launch of the 1st Pizza truck in the world in Marseille
- **1987**: Launch of Pizza Hut in France
- **1989**: Launch of Domino's Pizzas



THAT IS WHY YOU CAN BUY PIZZAS IN MORE THAN 100,000 PLACES



AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

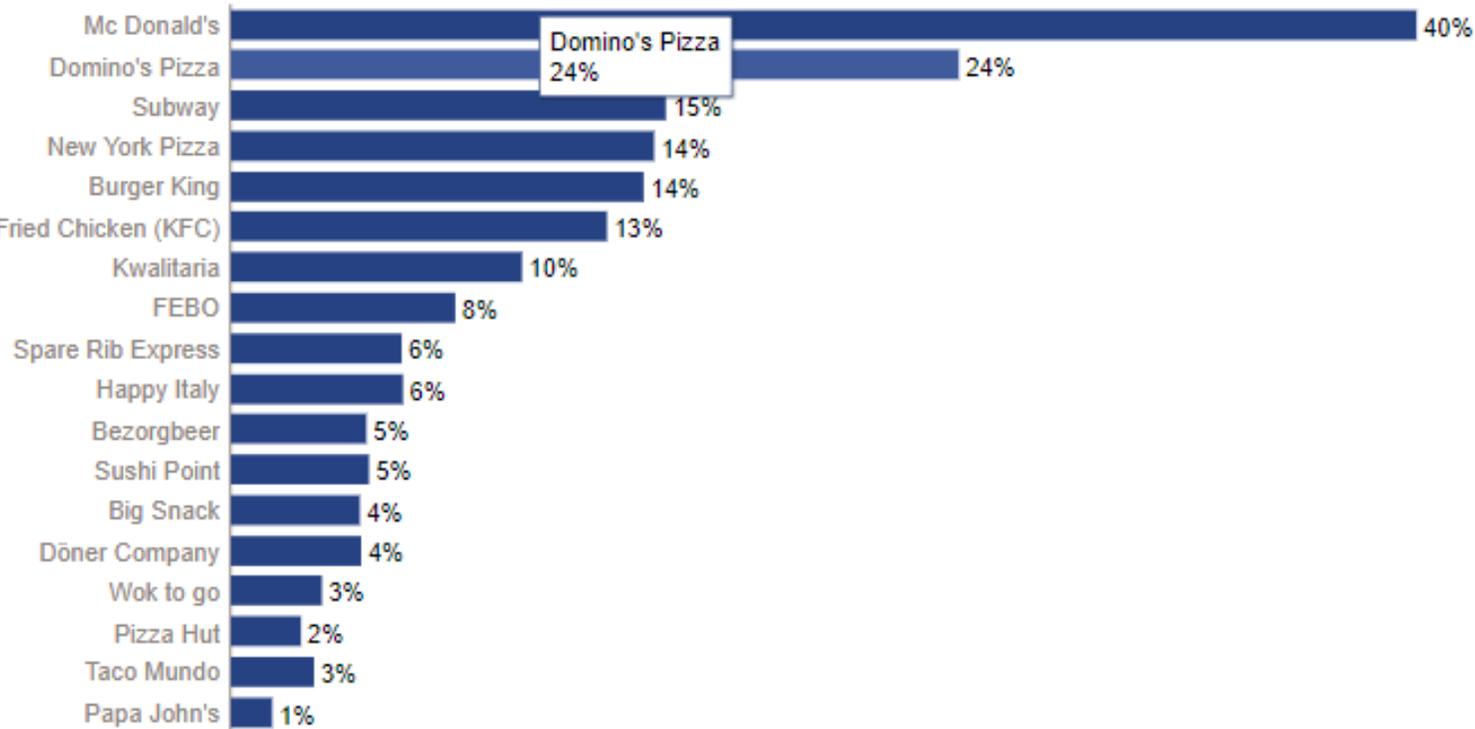
DENMARK



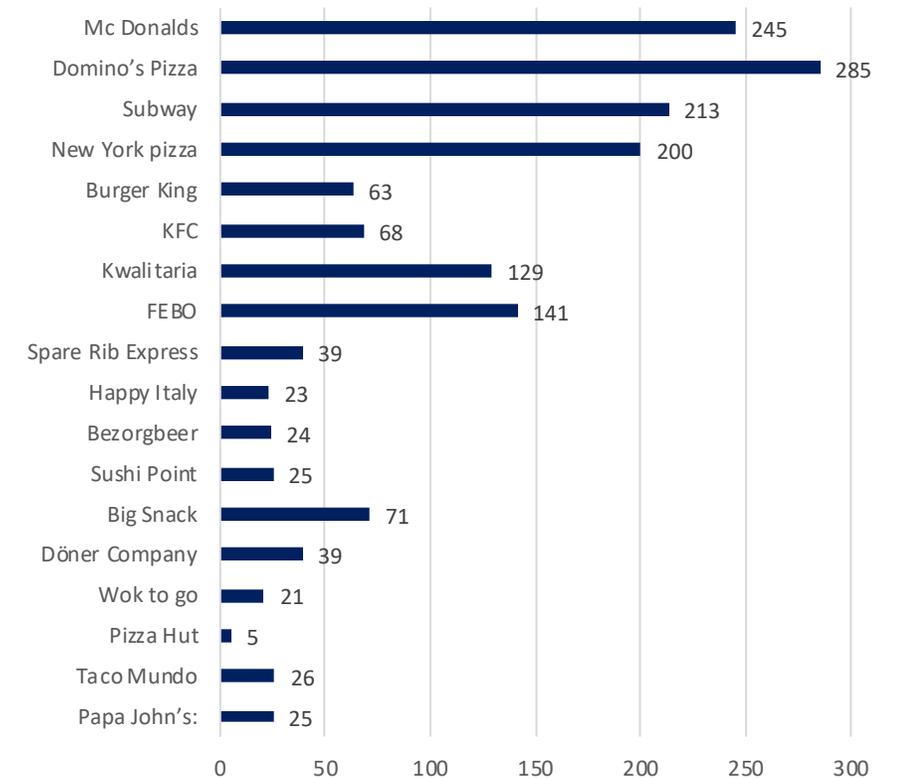
OPE NETHERLANDS

PENETRATION OF DOMINO'S SECOND HIGHEST IN TOTAL QSR MARKET. ONLY MCDONALDS HAS HIGHER PENETRATION. IN THE DELIVERY MARKET DOMINO'S HAS THE HIGHEST PENETRATION.

Q2 2019



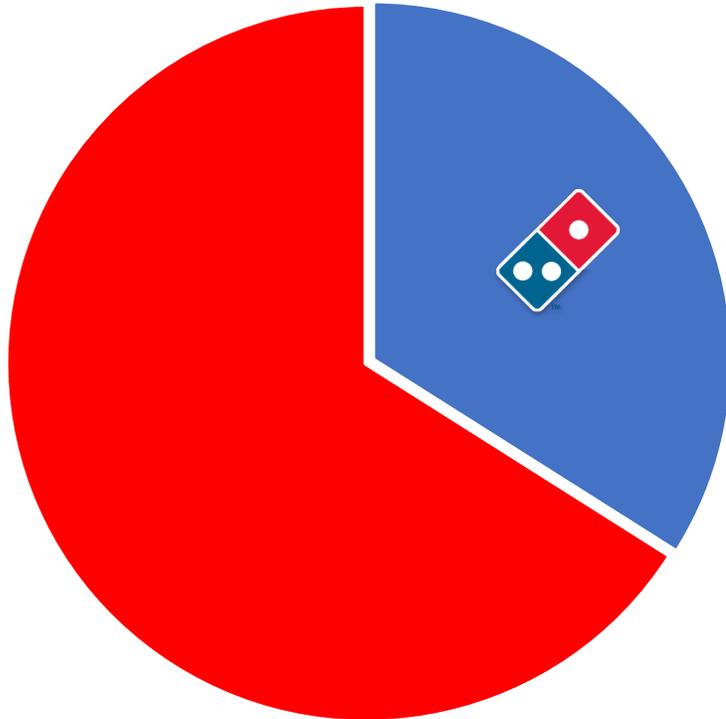
STORES





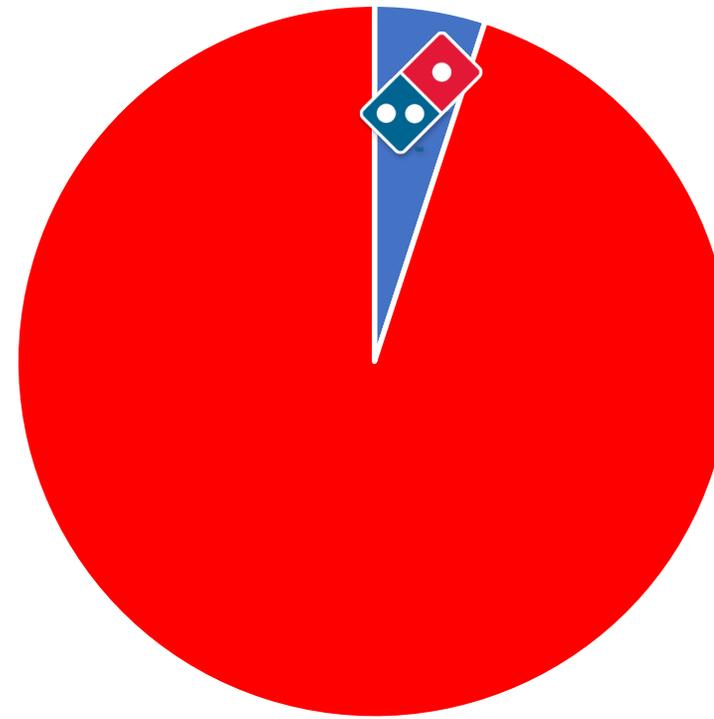
MARKET SHARE DOMINO'S 34% IN PIZZA MARKET BUT JUST 5% IN TOTAL QSR

SHARE OF PIZZA



■ Domino's Share ■ Other Pizza Restaurants

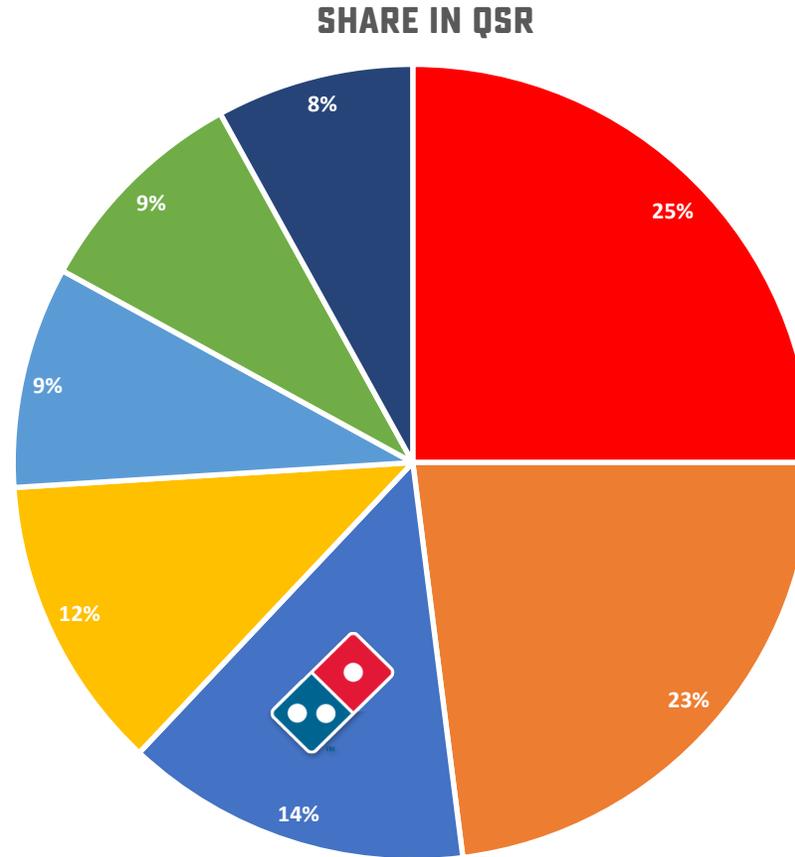
SHARE OF QSR



■ Domino's Share ■ Other QSR



ASIAN AND FAST FOOD HIGHEST SHARE IN QSR MARKET FOLLOWED BY PIZZA



■ Asian ■ Burgers / Fries ■ Pizza ■ Sandwiches ■ Other Meals ■ Grill ■ Dutch/French

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK



TV SPEND



BENELUX

NETHERLANDS: OPTIMAL. BELGIUM AND LUXEMBURG: NO TV



FRANCE

VERY LOW TV PRESENCE



GERMANY

FIRST VERY LIGHT TV STARTED 2 WEEKS AGO



DENMARK

NO TV



WHAT IF?

EUROPE HAD THE
CURRENT
PENETRATION OF:
THE NETHERLANDS

MEANING 1 STORE
PER 78,000
CUSTOMERS:

2,372
STORES

EUROPE HAD THE
CURRENT
PENETRATION OF:
THE UK

MEANING 1 STORE
PER 56,500
CUSTOMERS:

3,274
STORES

EUROPE HAD THE
CURRENT
PENETRATION OF:
ANZ

MEANING 1 STORE
PER 35,000
CUSTOMERS:

5,286
STORES

EUROPE HAD THE
CURRENT
PENETRATION OF:
ICELAND

MEANING 1 STORE
PER 15,669
CUSTOMERS:

11,806
STORES

REMEMBER OUR **OFFICIAL EUROPE FUTURE OUTLOOK IS 2,850 STORES, +160%, BY 2025-2030**



FORTRESSING

DEBUNKING THE MYTHS

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

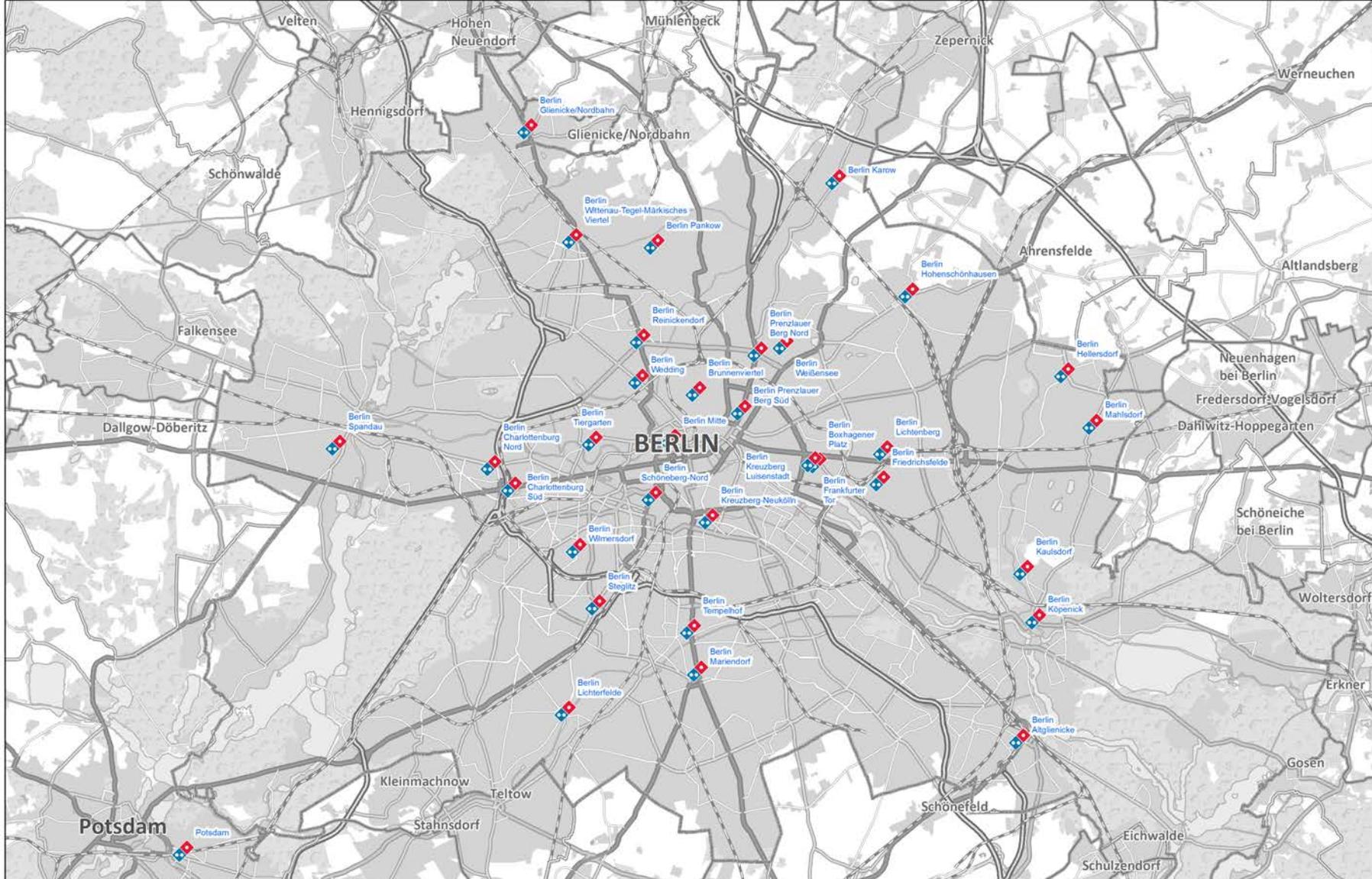
LUXEMBOURG

DENMARK





BERLIN

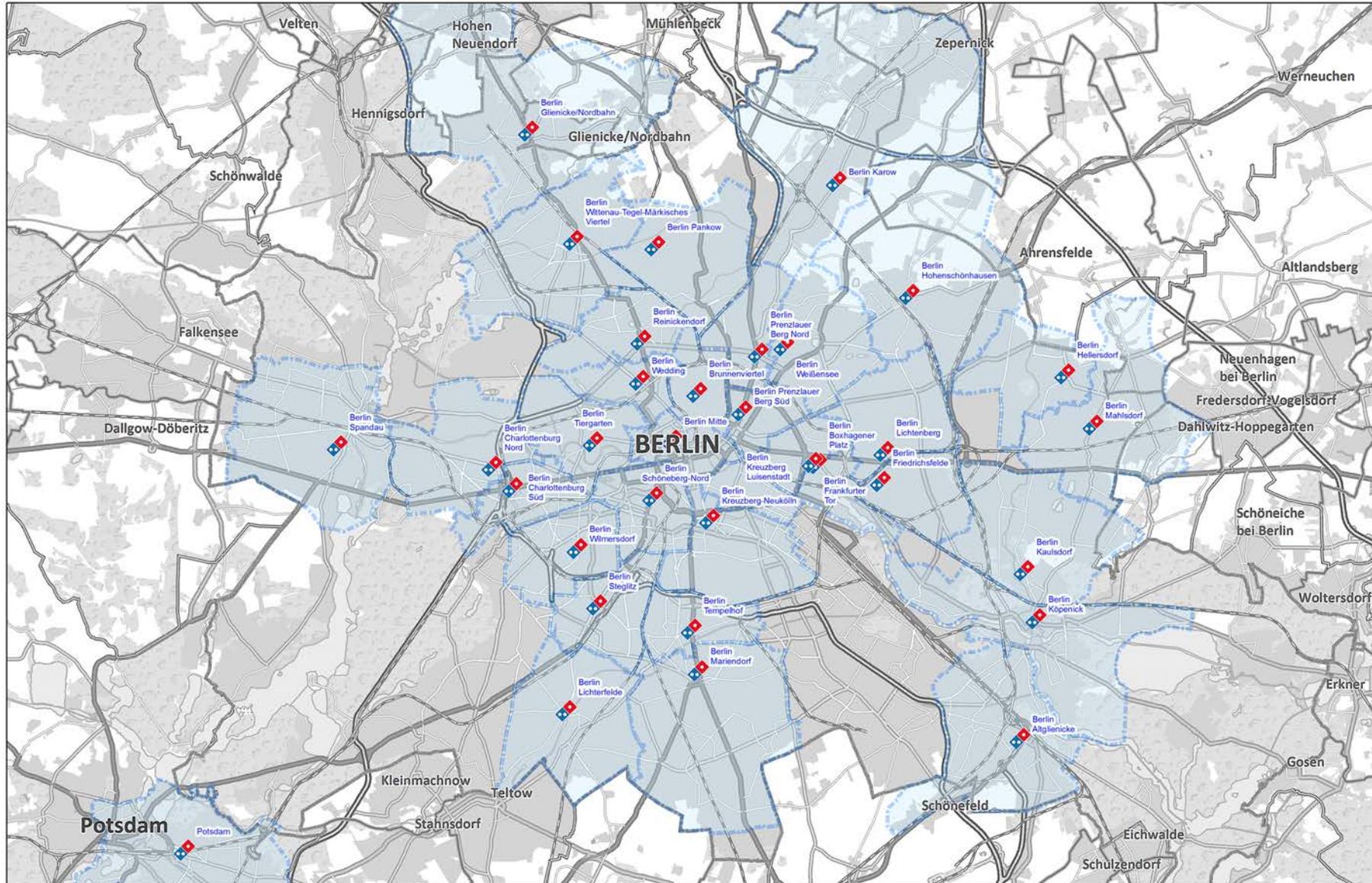


AUSTRALIA NEW ZEALAND BELGIUM FRANCE NETHERLANDS JAPAN GERMANY LUXEMBOURG DENMARK





BERLIN

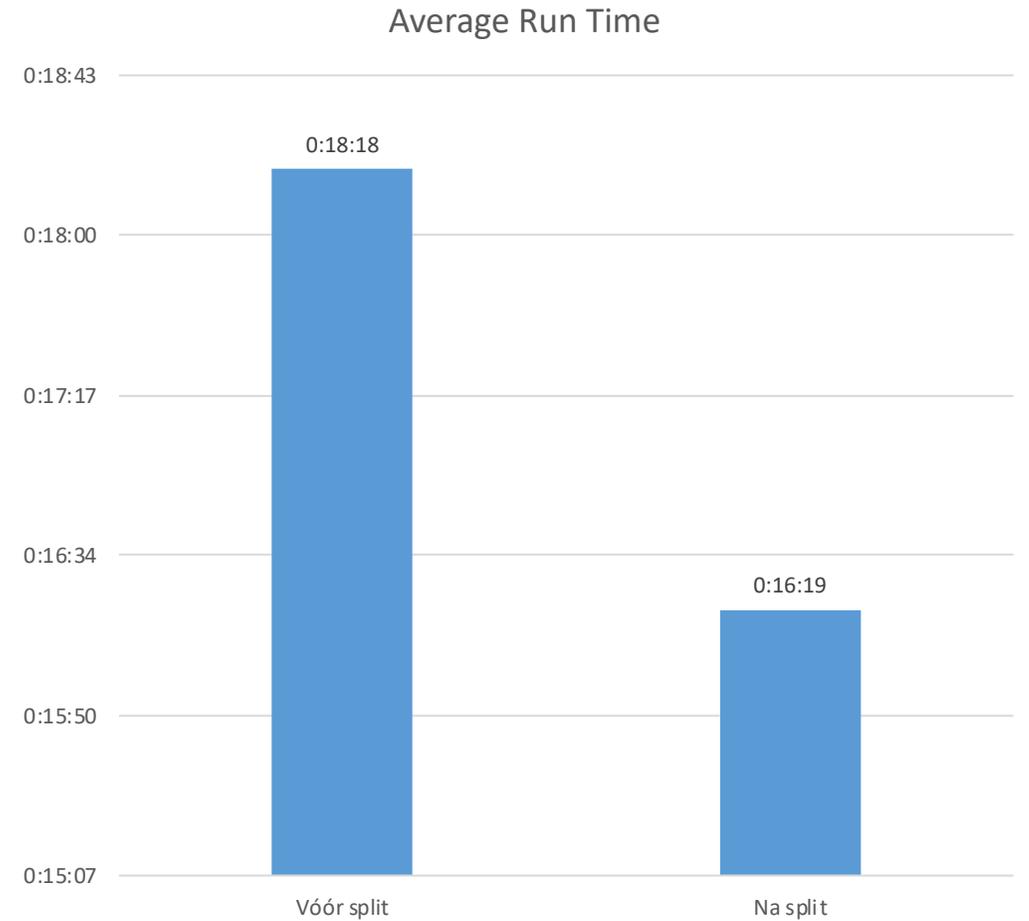
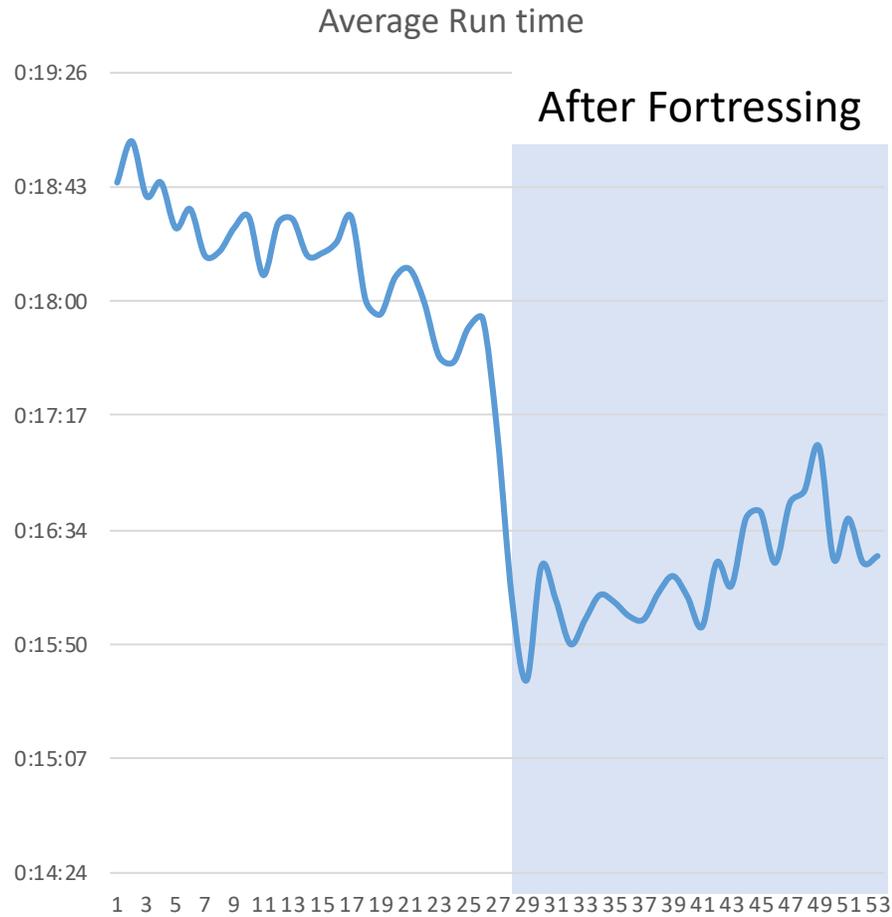


AUSTRALIA NEW ZEALAND BELGIUM FRANCE NETHERLANDS JAPAN GERMANY LUXEMBOURG DENMARK





REDUCTION OF THE RUN TIME BY FORTRESSING STORES: THE RUN TIME DECREASES WITH AN AVERAGE OF 2 MINUTES





THE REDUCTION OF THE AVERAGE RUN TIME REDUCES THE WAGE COSTS PER ORDER

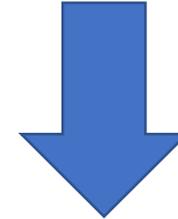
WEEKLY LABOUR DECREASE

More than 16 hours



YEARLY LABOUR DECREASE

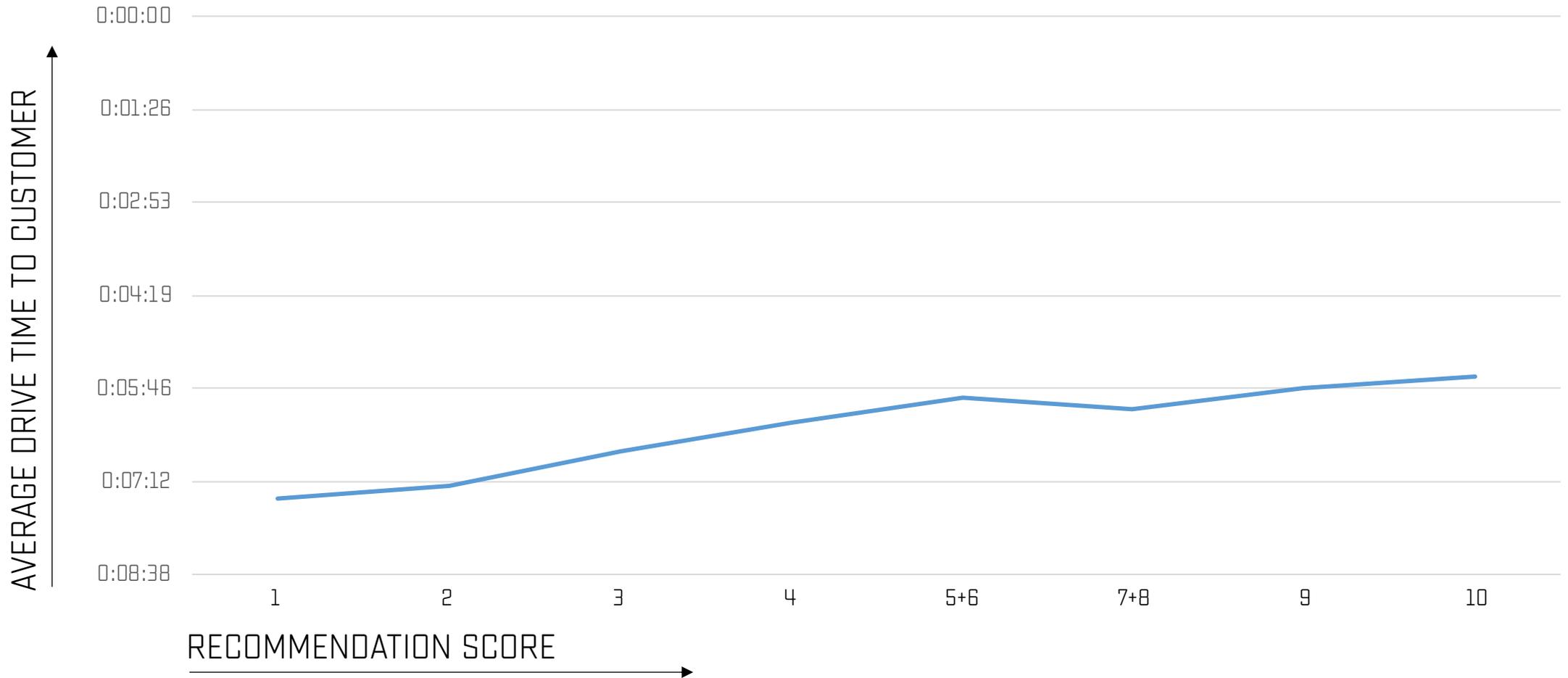
More than 832 hours





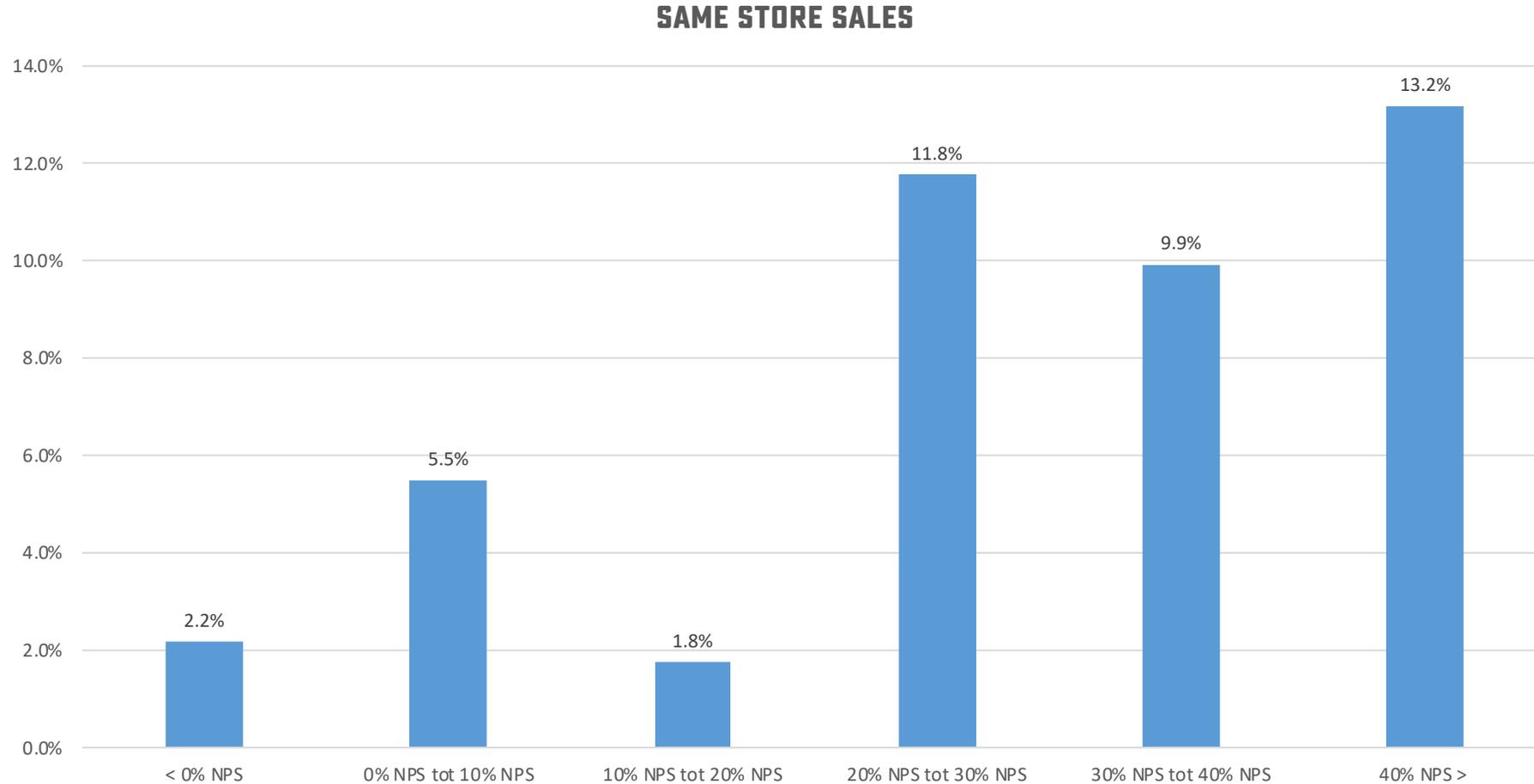
DRIVE TIME TO THE CUSTOMER HAS A POSITIVE EFFECT ON NPS

AS THE AVERAGE DRIVING TIME DECREASES, THE NPS INCREASES





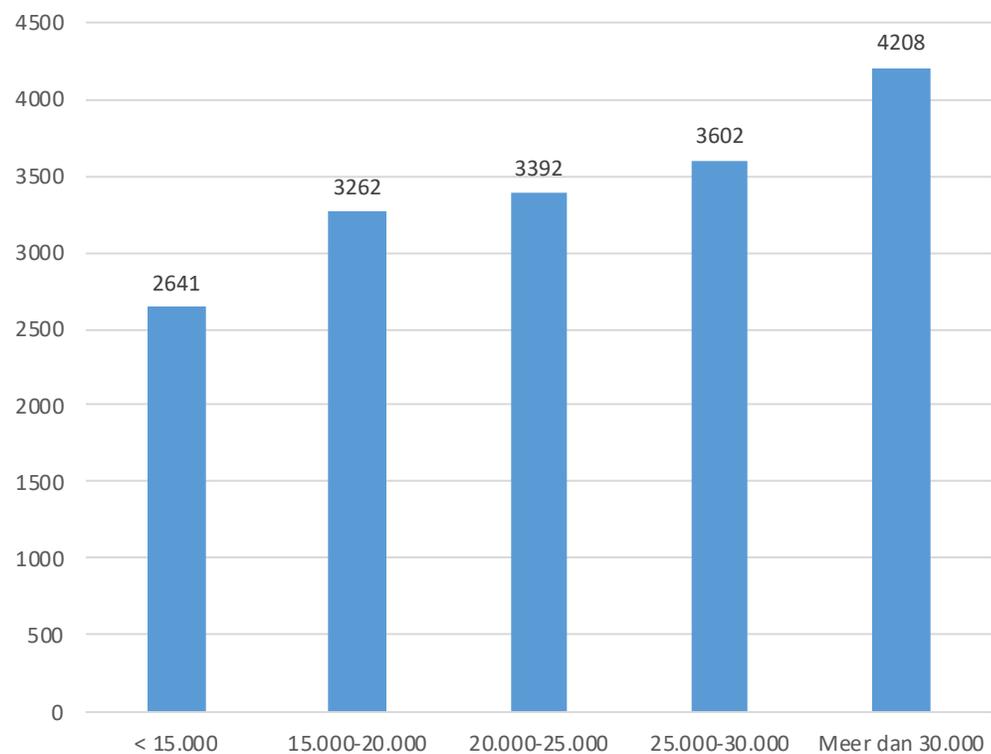
THERE IS A STRONG CORRELATION BETWEEN NPS AND SSS: A RELATIVELY HIGH NPS TRANSLATES INTO RELATIVELY HIGH SAME STORE SALES



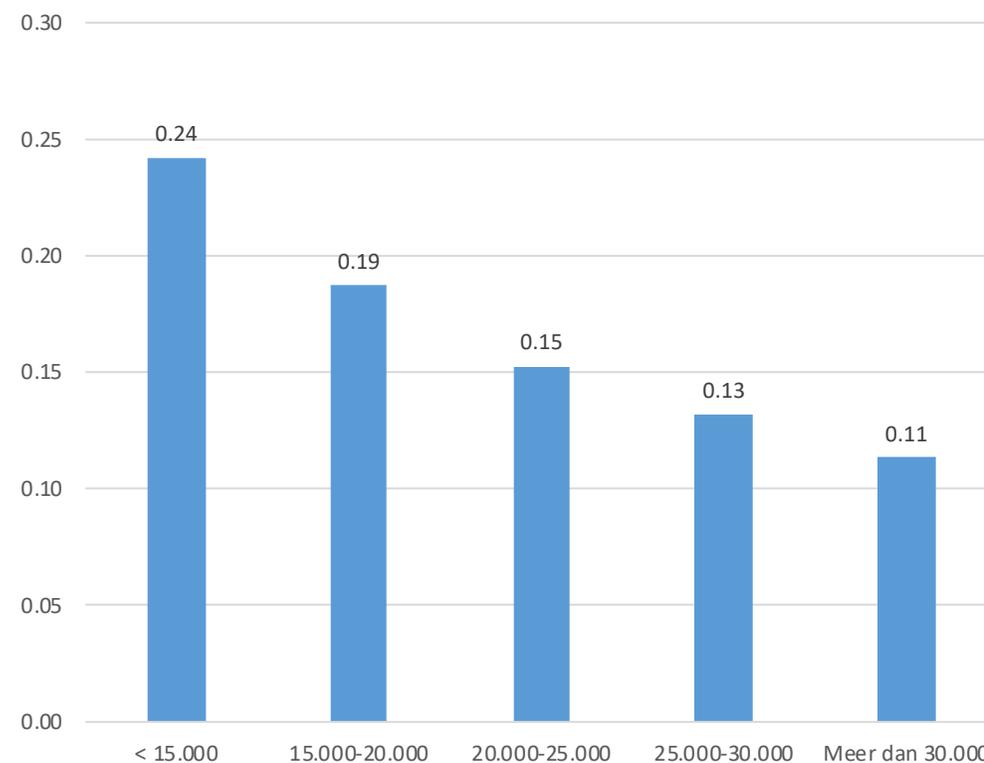


TOTAL ORDERS HIGHER FOR STORES WITH HUGE DELIVERY AREAS, BUT ORDERS PER HOUSEHOLD ARE WAY LOWER

ORDERS MAY X #HOUSEHOLDS DELIVERY AREA

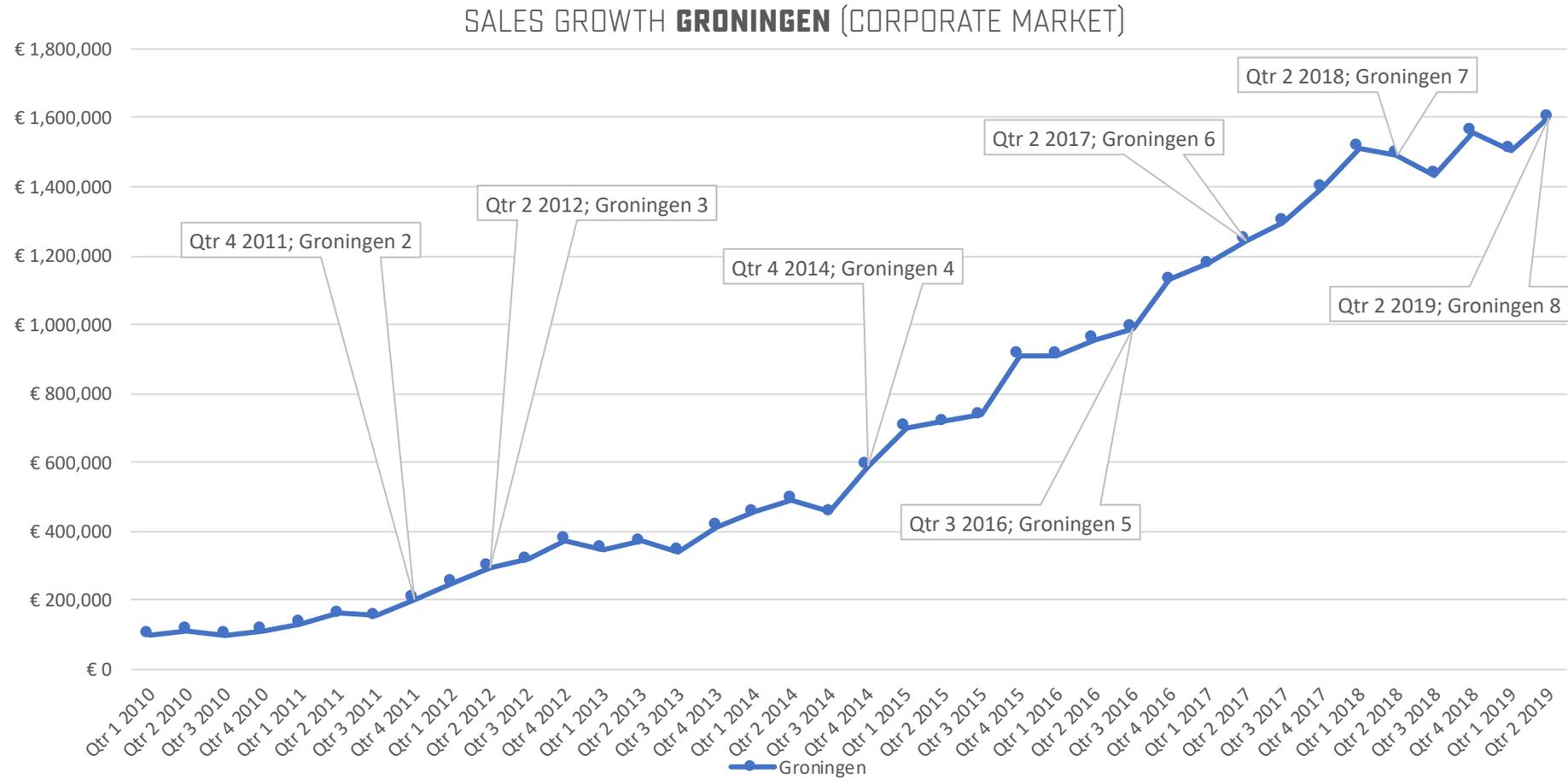


ORDERS PER HOUSEHOLD, PER MONTH



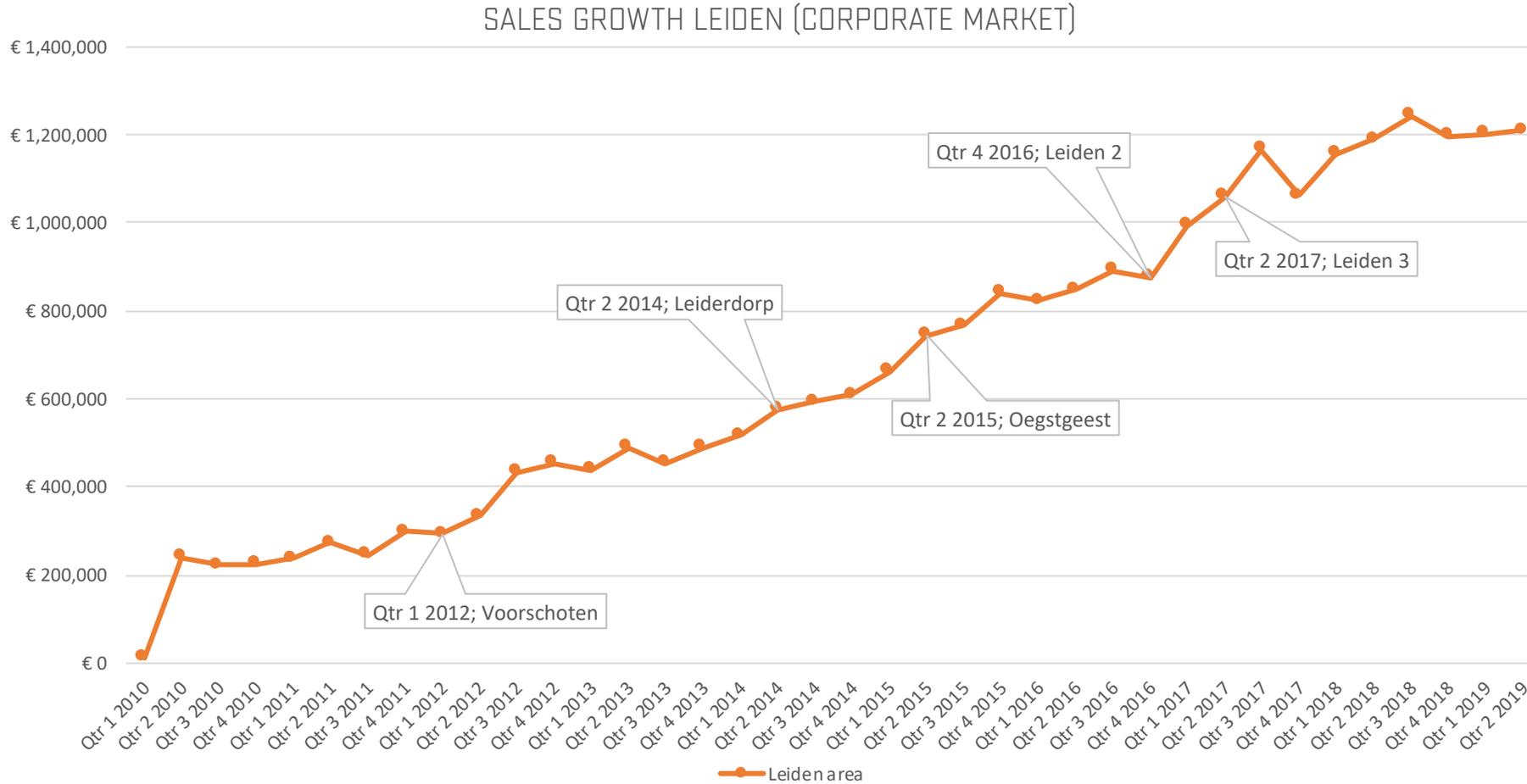


GRONINGEN HAS ACHIEVED SIGNIFICANT SALES GROWTH AS A RESULT OF FORTRESSING THE MARKET WITH ROUGHLY ONE STORE PER YEAR





LEIDEN HAS ACHIEVED SIGNIFICANT SALES GROWTH AS A RESULT OF FORTRESSING THE MARKET.



AGGREGATORS

CONTINUING TO DEBUNK THE MYTHS

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

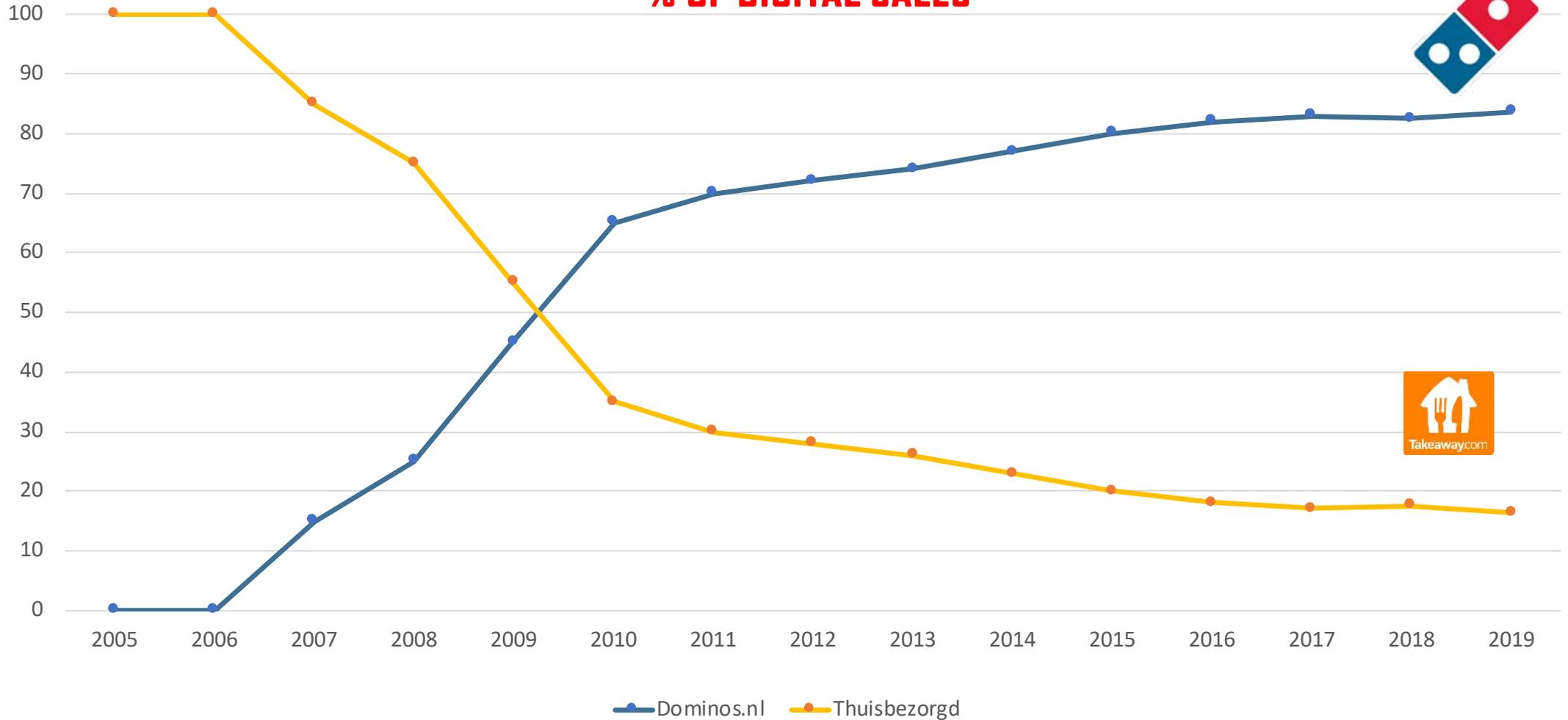
LUXEMBOURG

DENMARK



AGGREGATORS ARE NOT NEW

% OF DIGITAL SALES



AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

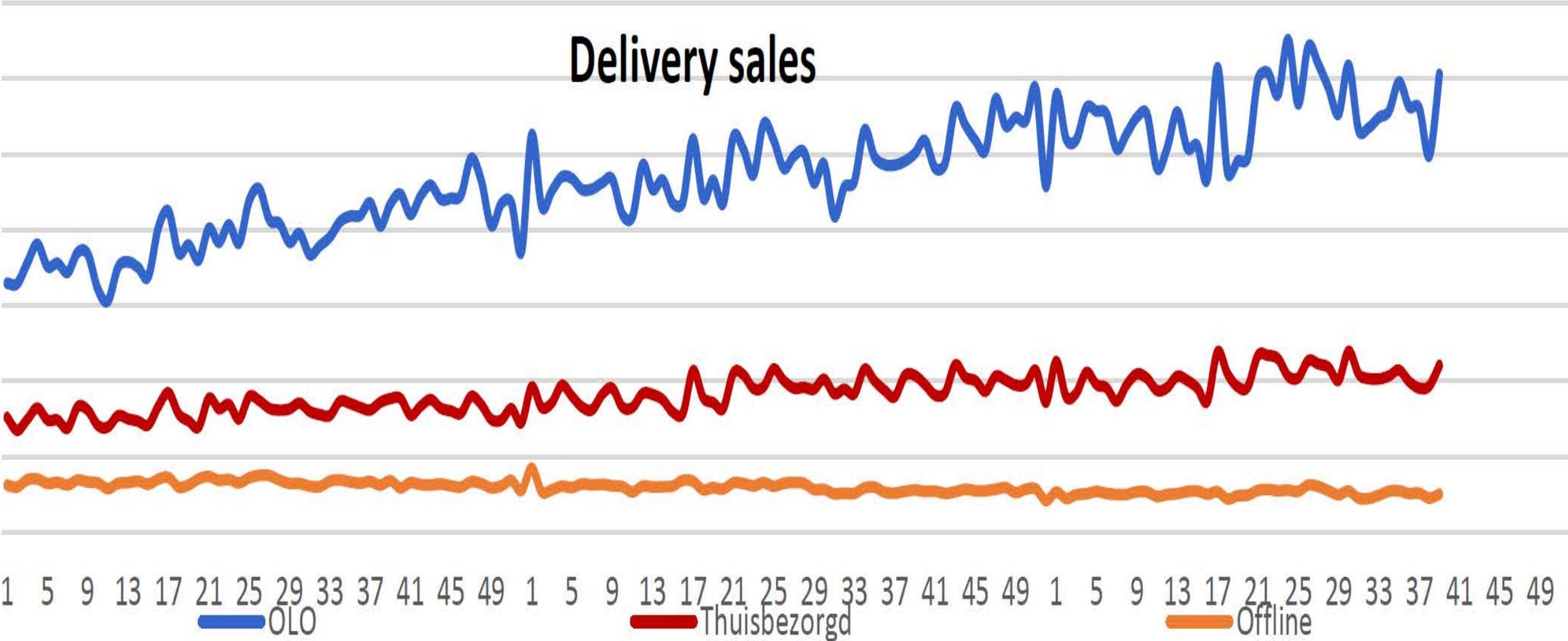
LUXEMBOURG

DENMARK



AGGREGATORS: PART OF A GROWING MARKET

Delivery sales



AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK





DIGITAL FORTRESSING

INCREMENTAL CUSTOMERS

- USE AGGREGATORS AS 'SEARCH ENGINE FOR FOOD'
- IF DOMINO'S IS NOT IN THE SEARCH ENGINE, THE PURCHASE GOES TO A COMPETITOR

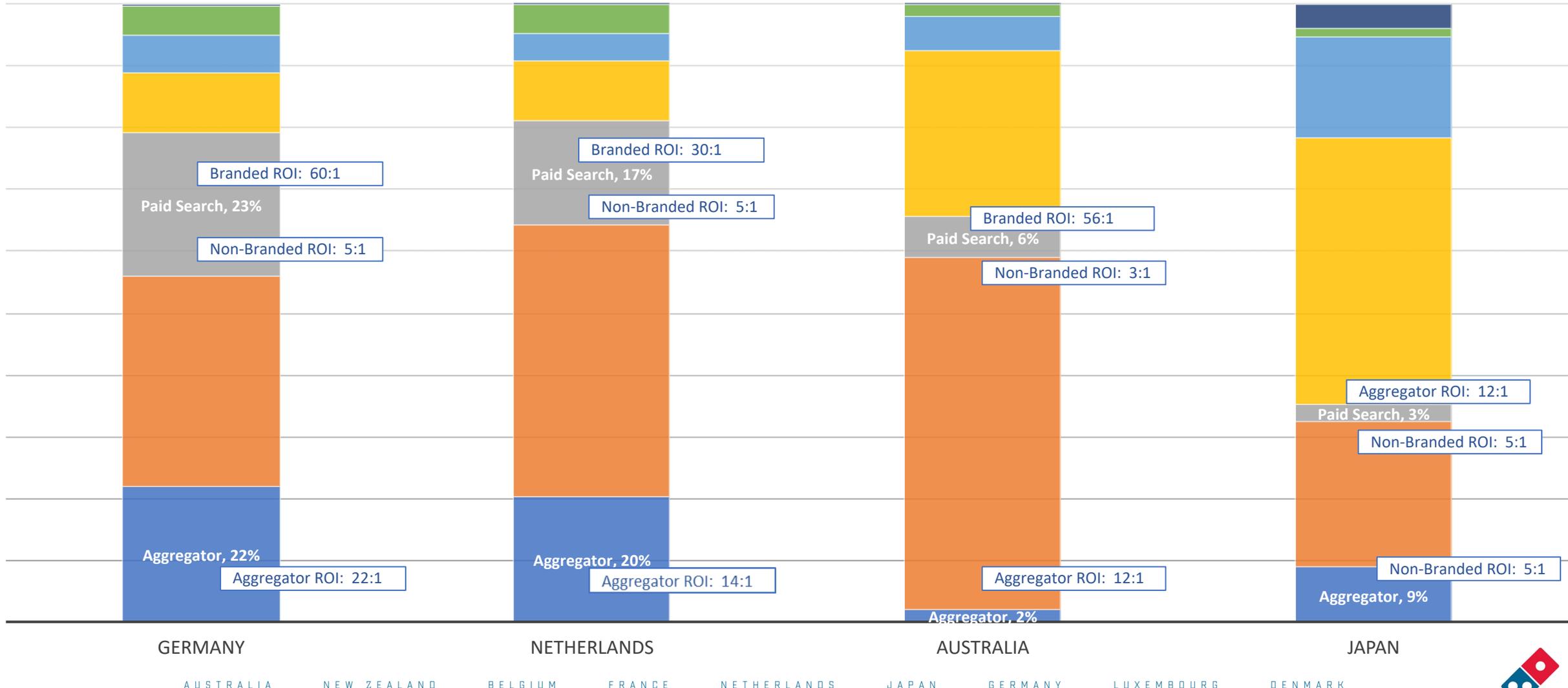
ADVERTISING

- LOWERS THE COST OF ADVERTISING AS WE RANK HIGHER THAN COMPETITORS ON PRICE AND DELIVERY SPEED
- CONVERSELY RAISES THE COST OF ADVERTISING FOR OTHER OPERATORS WHO DON'T RANK AS HIGHLY



IT'S A DIGITAL ADVERTISING CHANNEL

DIGITAL ORDER SHARE BY LEAD SOURCE - JUL '19



AGGREGATOR ORDERS: THE DIFFERENCES

DOMINO'S DIFFERENTIATORS: BOTH ON AND OFF AGGREGATORS

WE DELIVER

- OUR TEAM MEMBERS
- OUR SINGLE BRAND - UNIFORMS AND VEHICLES
- OUR FOCUS ON SAFETY
- OUR COMMITMENT TO DOMINO'S CUSTOMER SERVICE
- OUR REWARDING CAREERS - TRAINING, WAGES, SUPERANNUATION, INSURANCE
- OUR COMMITMENT TO COMMUNITY - INCLUDING TAXES PAID

AGGREGATOR ORDER VS DOMINO'S ORDER

HIGHER TICKET FOR DOMINO'S ORDER

NO DISCOUNTING FOR AGGREGATORS

DELIVERY SURCHARGE FOR AGGREGATORS

- (FLOWS THROUGH TO STORE)

FEE TO AGGREGATOR AT COMMERCIAL RATES





DOMINO'S ANZ

NICK KNIGHT
CEO, AUSTRALIA/NEW ZEALAND

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

ANZ - OUR GROWTH

820

FY19 STORE COUNT

1200

2025-2028 STORE TARGET



A physical map of the Oceania region, showing Australia, New Zealand, and the Pacific Islands. The map uses a color gradient from green (low elevation) to brown (high elevation) to represent terrain. A white grid of latitude and longitude lines is overlaid on the map. The text 'THE MOST PENETRATED MAJOR MARKET IN THE WORLD?' is centered over the Australian continent in a large, bold, white, sans-serif font.

**THE MOST PENETRATED
MAJOR MARKET IN THE
WORLD?**

OCEANIA

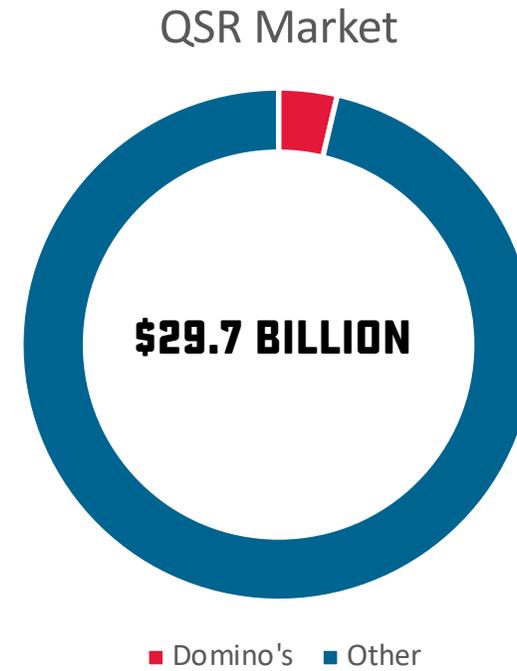
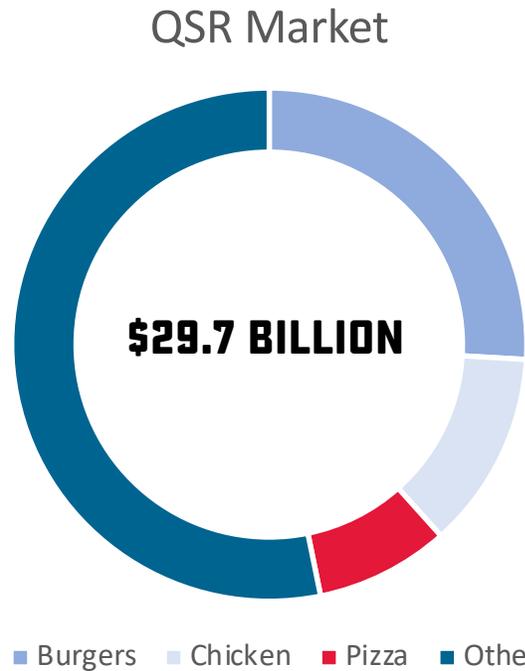
PHYSICAL

LAMBERT AZIMUTHAL EQUAL AREA PROJECTION

© 2014 National Geographic Society



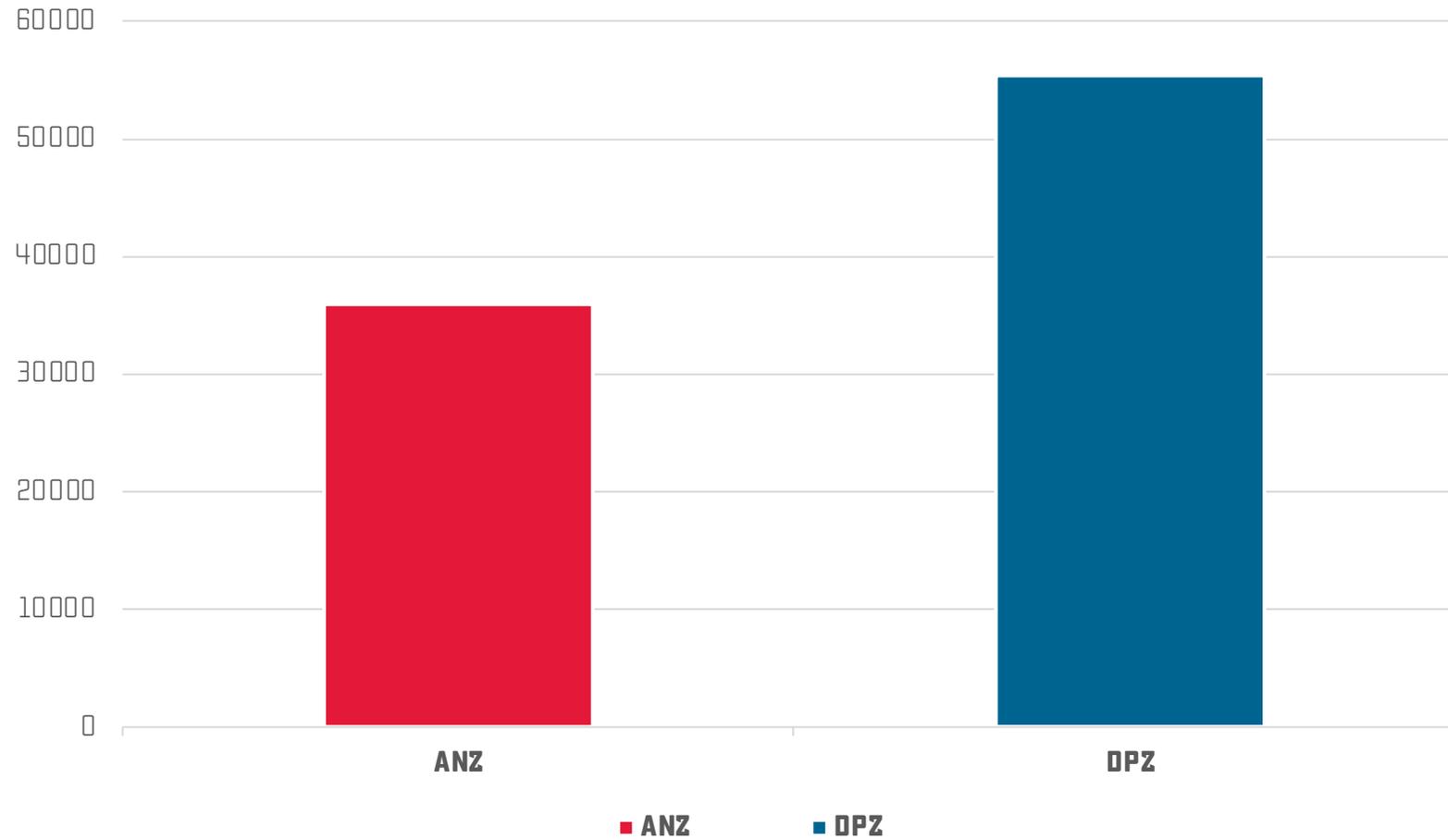
MARKET POSITION



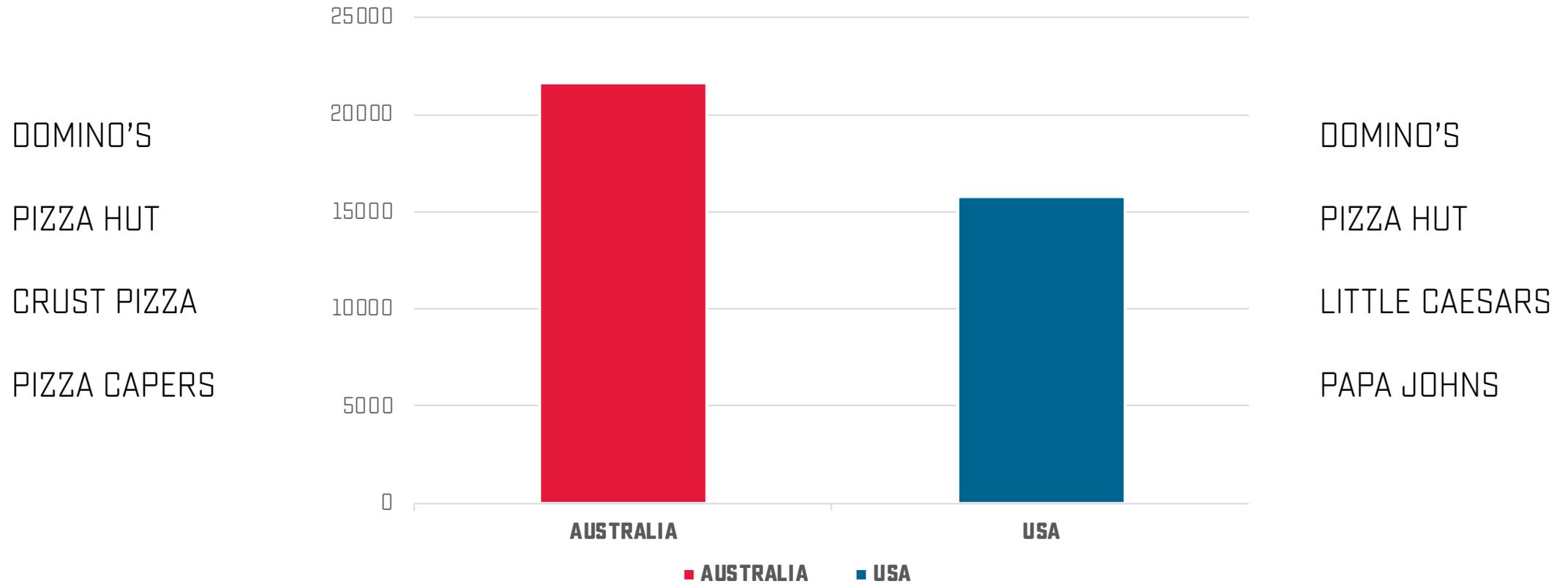
DOMINO'S SHARE OF QSR SPEND 3.6%
DOMINO'S SHARE OF QSR PIZZA SPEND 43.8%



ANZ VS OTHER MARKETS



PIZZA CATEGORY - THE TOP 4



Population per store using current, publicly available data





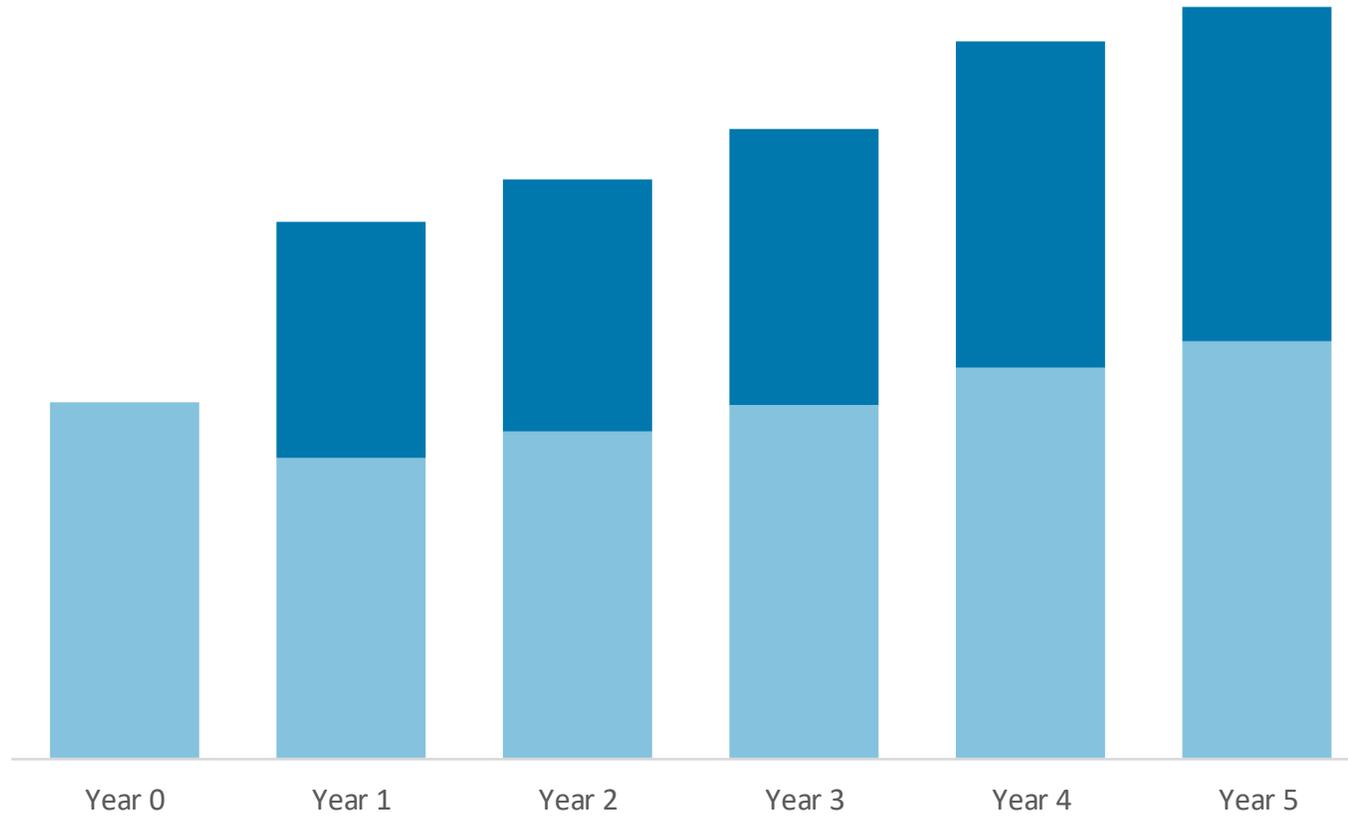
**“35,000 PEOPLE PER STORE
IS MATURE”**

**“28,000 PEOPLE PER STORE
IS NOT ACHIEVABLE”**



FORTRESSING TO GROW

+211% AWUS IN 5 YEARS



- ORIGINAL STORES RECOVERED SALES IN TWO YEARS.
- TERRITORY SALES MORE THAN DOUBLED IN FIVE YEARS.

■ Existing Store AWUS ■ New Store AWUS

(1) AWUS = Average weekly sales of a store

(2) Analysis based on 98 fortressed between 2012 and 2017, data sourced from Domino's data warehouse





FORTRESSING BENEFITS

ADDITIONAL SALES

INCREMENTAL SALES FROM CARRY-OUT CUSTOMERS

ADDITIONAL DELIVERY CUSTOMERS FROM LOWER DELIVERY TIMES

OPERATIONAL COSTS REDUCE

REDUCED DELIVERY RUN TIMES CUT LABOUR COSTS: WAGES PER DELIVERY DROP, MILEAGE COSTS REDUCED, AND ALTERNATIVE VEHICLES BECOME FEASIBLE (INCREASING LABOUR AND MILEAGE BENEFITS)

HIGHER BRAND CONSIDERATION

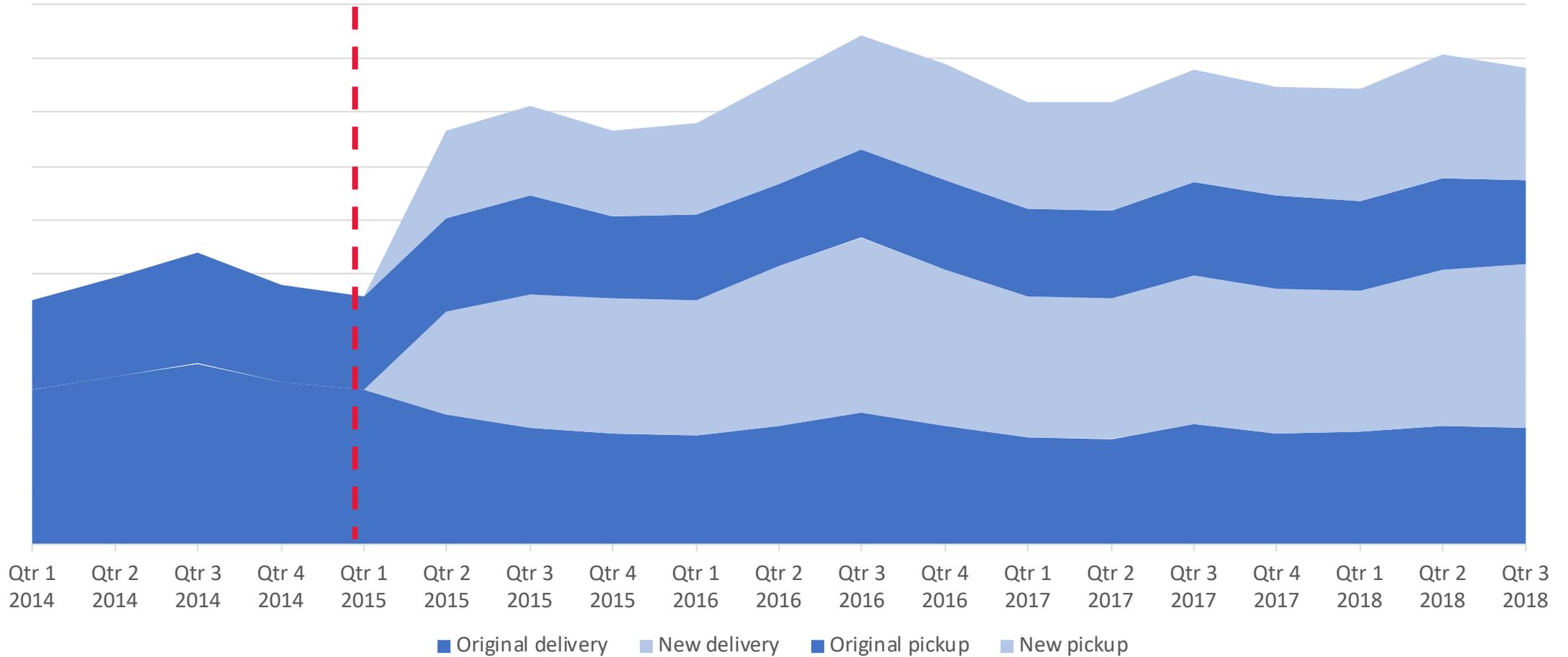
INCREASED STORE DENSITY IS CLOSELY CORRELATED WITH MEAL CONSIDERATION BY CUSTOMERS

HIGHER MARKETING ROI

MARKETING RETURN ON INVESTMENT LIFTS, PARTICULARLY FOR LOCAL PRINT, IN LINE WITH MARKET PENETRATION



FORTRESSING TO GROW - A TERRITORY

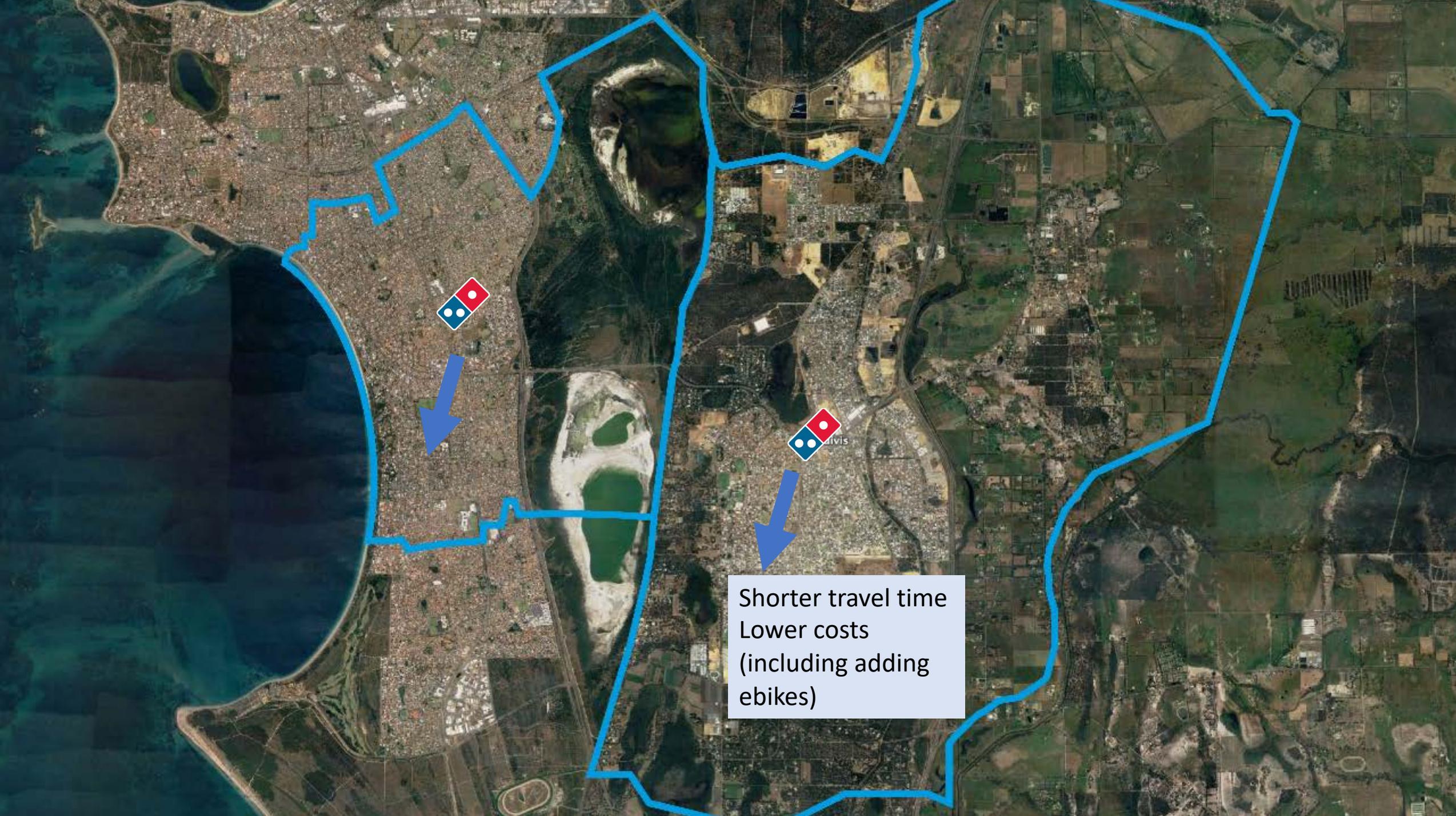




Shorter travel time
Lower costs
(labour + vehicle)

Longer travel time
Higher costs
(labour + vehicle)

Baldivis

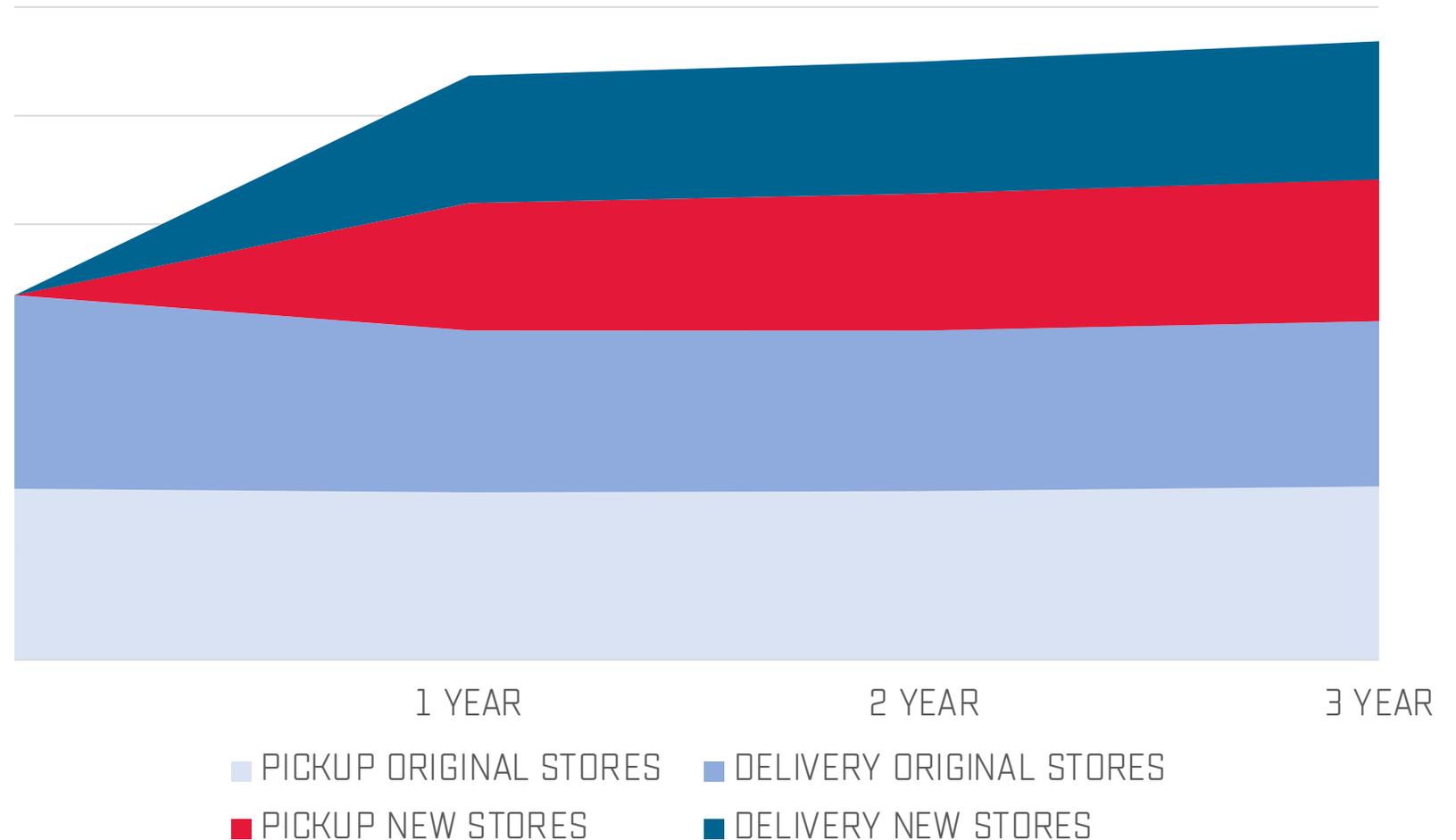


Shorter travel time
Lower costs
(including adding
ebikes)

FORTRESSING DOES NOT IMPACT PICKUP SALES

- PICKUP SALES FROM ORIGINATING STORE ARE ALMOST ENTIRELY UNAFFECTED BY THE SPLIT

- NEW STORES GENERATE NEW PICKUP SALES AND CONTINUE GROWTH



* DATA FROM 30 TERRITORY CHANGES RESULTING IN 69 FORTRESSED STORES COMPLETED IN 2015 AND 2016

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

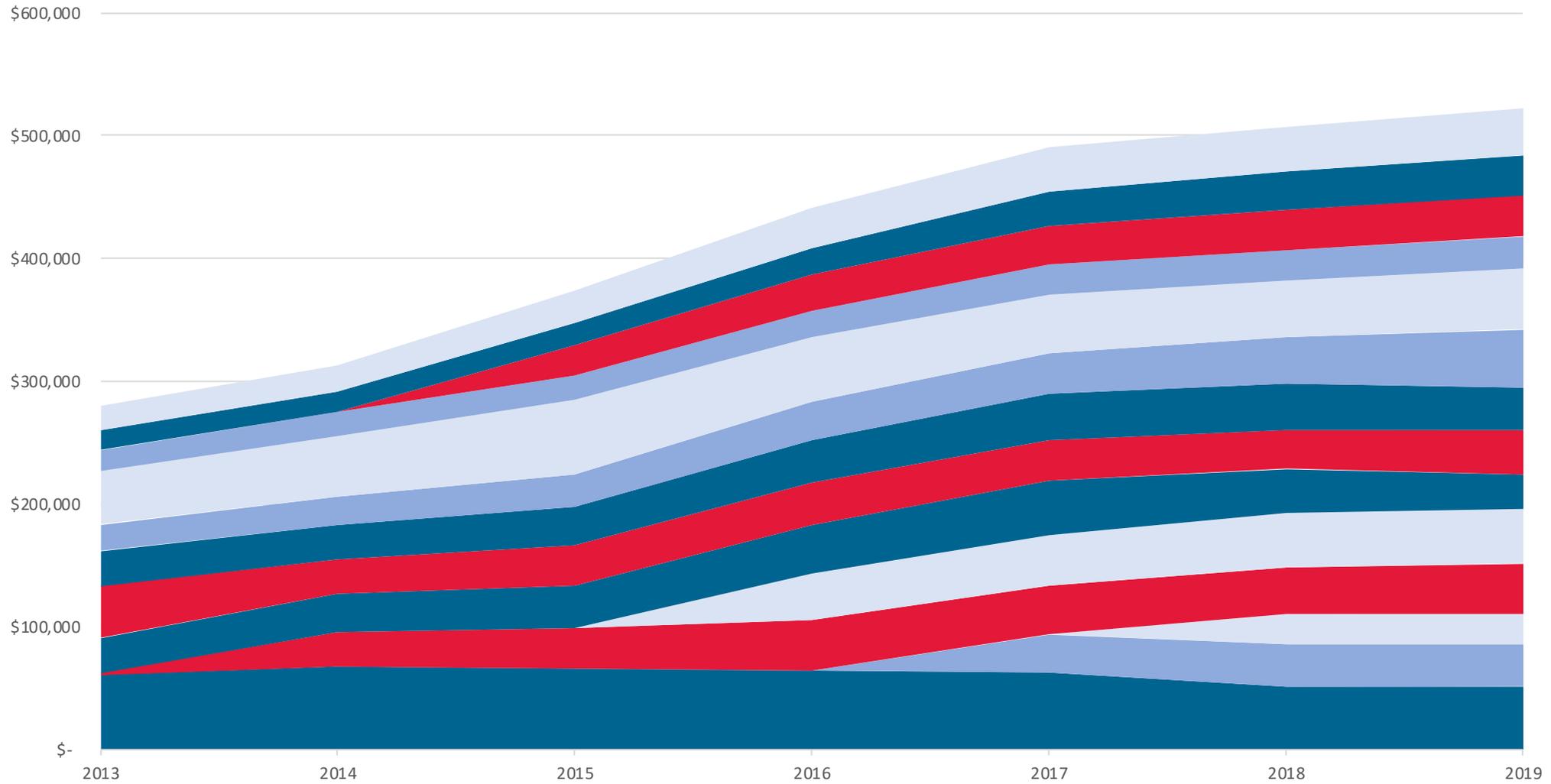
GERMANY

LUXEMBOURG

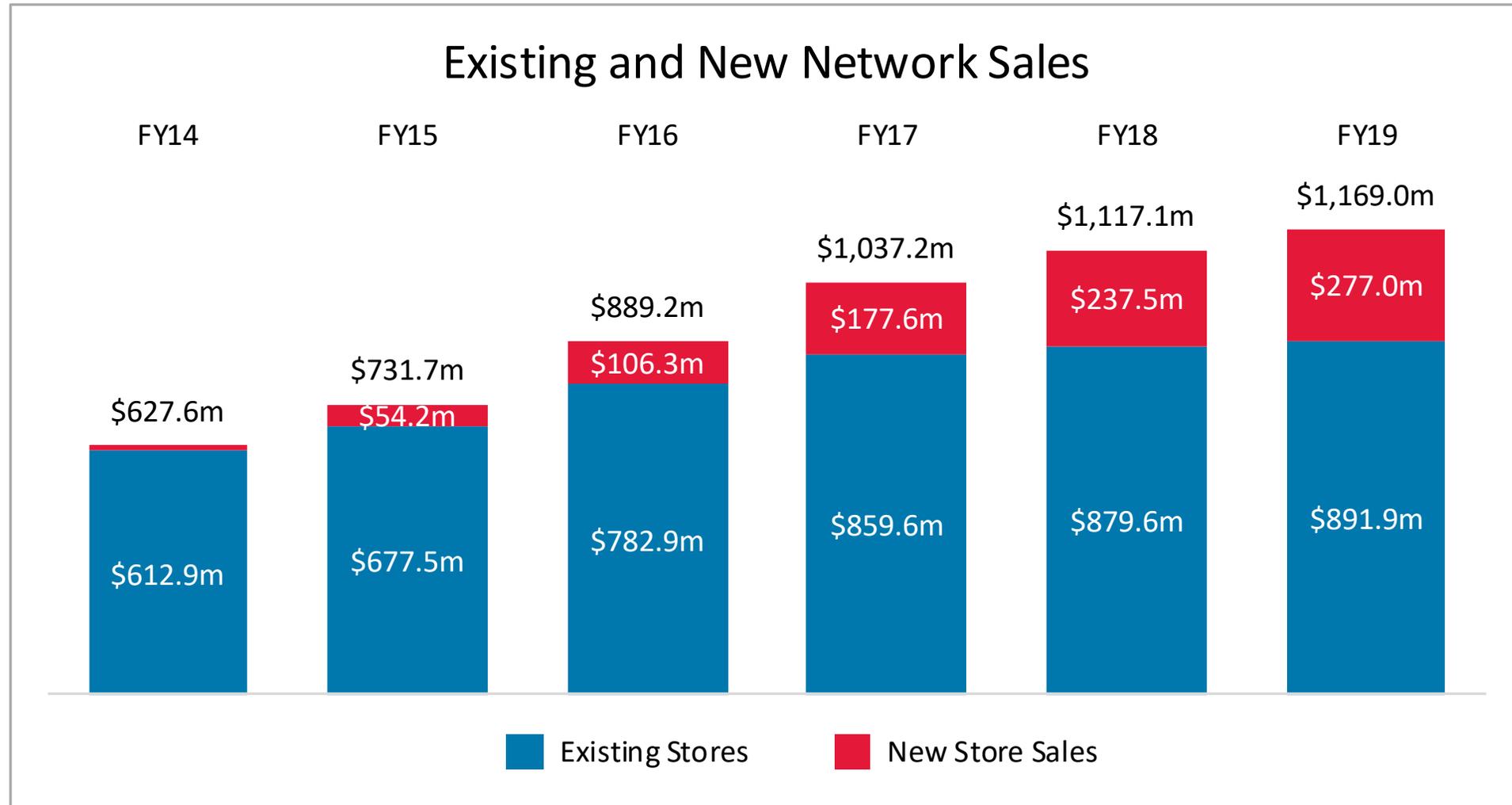
DENMARK



FORTRESSING TO GROW - A TV MARKET



FORTRESSING TO GROW - A COUNTRY



(1) New stores include all stores opened after 30/06/2013



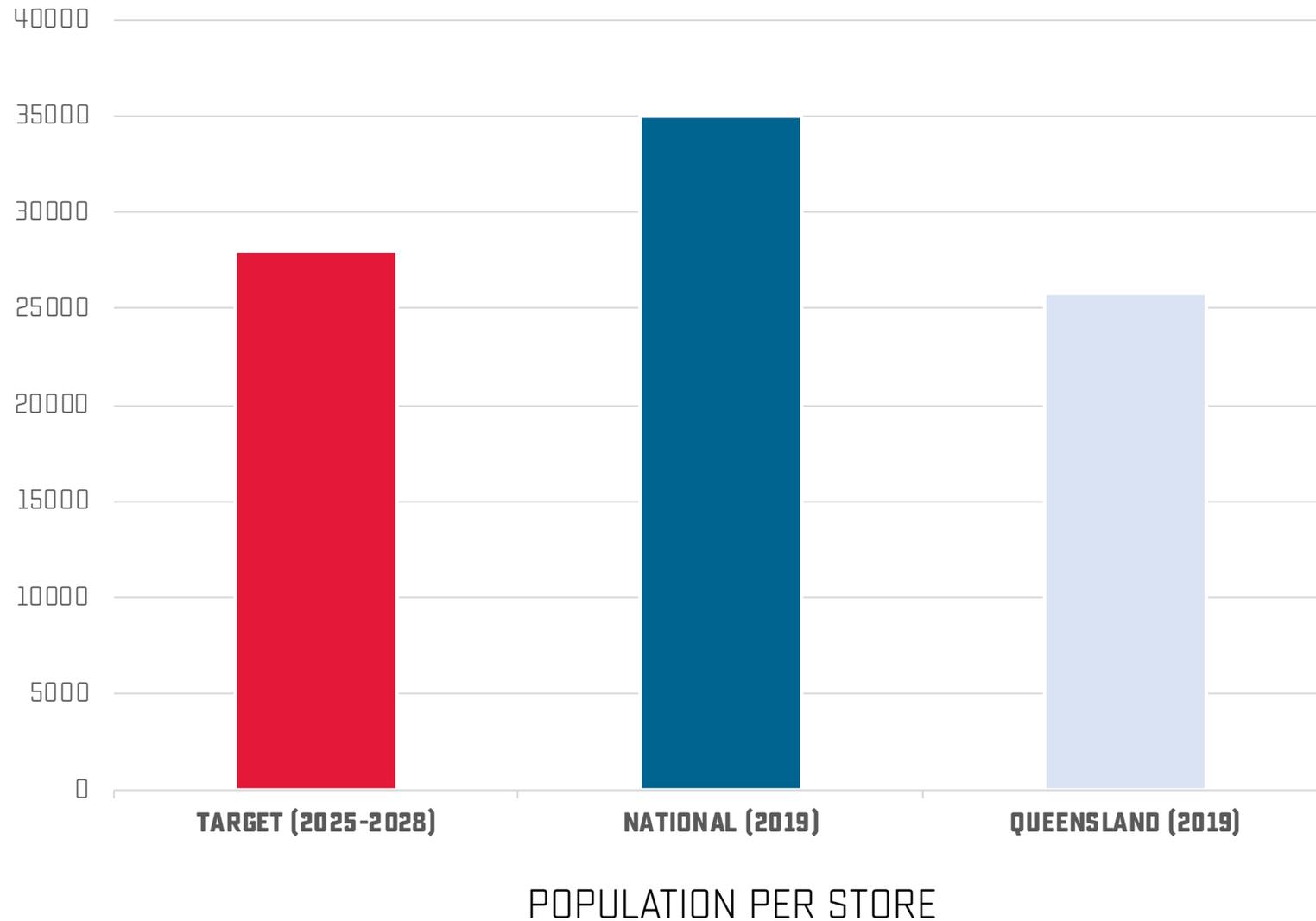


**“35,000 PEOPLE PER STORE
IS MATURE”**

**“28,000 PEOPLE PER STORE
IS NOT ACHIEVABLE”**



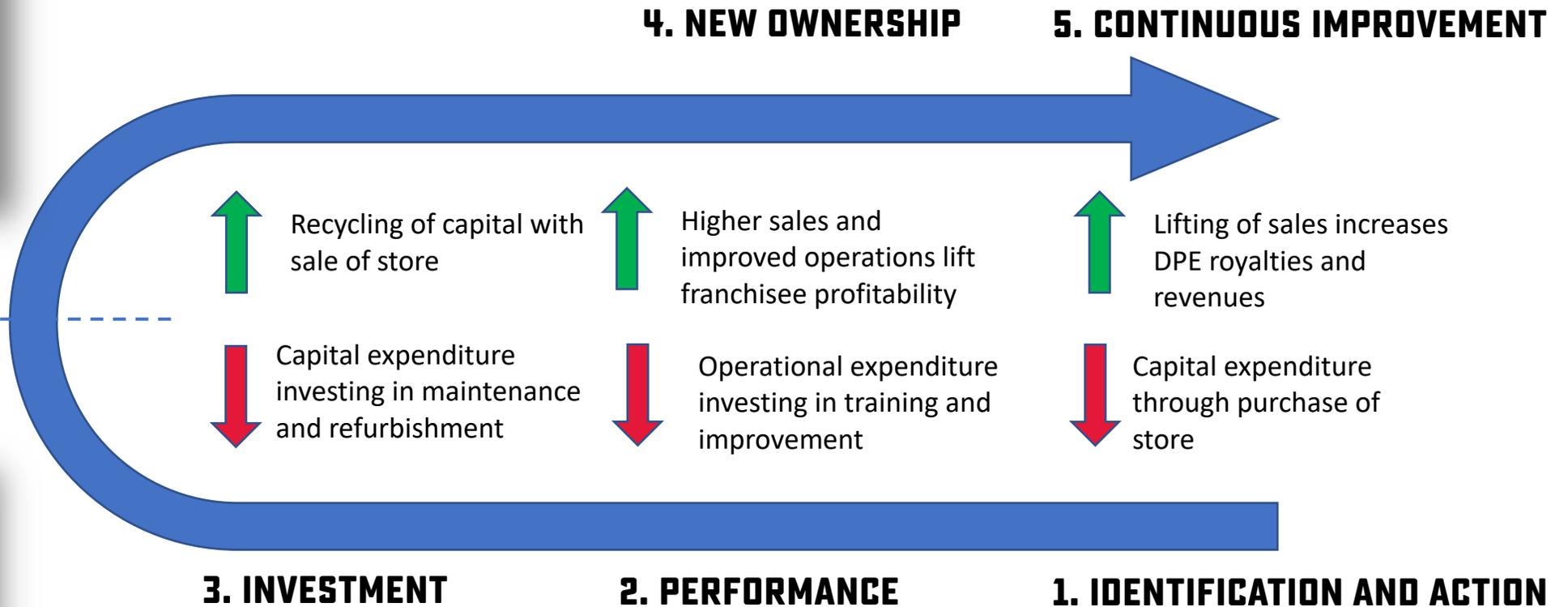
WE'VE ALREADY SHOWN IT'S POSSIBLE



FORTRESSING WITH HIGH QUALITY FRANCHISEES



**SALE TO FRANCHISEE
(TYPICALLY EQUAL TO OR GREATER THAN CARRYING VALUE)**



FORTRESSING WITH HIGH QUALITY FRANCHISEES

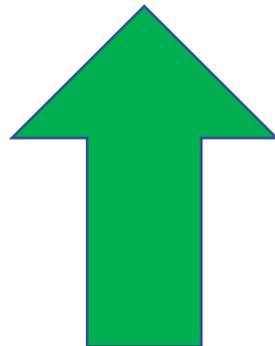
FRANCHISEE "F"	NEW FRANCHISEE "B"
55.5%	78.3%
28.10 minutes	23.16 minutes
-21.2%	28.8%

ONE DRIVER, ONE DELIVERY ✓

FASTER DELIVERIES ✓

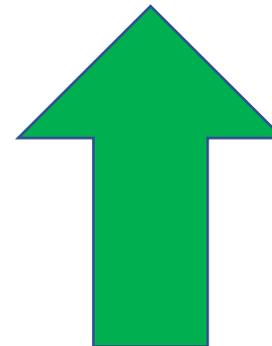
SATISFIED CUSTOMERS ✓

+24.5%



SALES GROWTH
\$5618/WEEK

\$2942/week



PROFIT GROWTH
\$152,983/YR



FORTRESSING WITH HIGH QUALITY FRANCHISEES

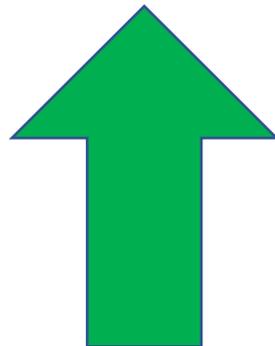
FRANCHISEE "F"	NEW FRANCHISEE "B"
78.9%	79.2%
20.87 minutes	20.54 minutes
30.3%	28.3%

ONE DRIVER, ONE DELIVERY ✓

FASTER DELIVERIES ✓

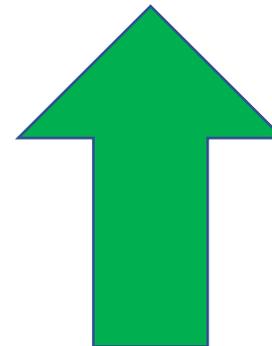
SATISFIED CUSTOMERS ✓

+21.6



SALES GROWTH
\$3992/WEEK

\$1364/week



PROFIT GROWTH
\$70,967/YR



PRODUCT QUALITY IS KEY

DOM PIZZA CHECKER UPDATE

MATCHING

CAPTURES A PHOTO OF THE PIZZA AND MATCHES IT TO AN ORDER ON THE PACK SCREEN IN UNDER 3 SECONDS

GRADES

ANALYSES THE PIZZA AND DISPLAYS A GRADE BASED ON THE CHEESE + BORDER + SPREAD

REMAKES

IDENTIFIES BAD PIZZAS AS A REMAKE AND DISPLAYS POP-UP AND SOUND NOTIFICATION TO ALERT STORE. IF THE REMAKE IS ACCEPTED IT IS DISPLAYED ON THE MAKE LINE.

CUSTOMER EXPERIENCE

REAL TIME PIZZA IMAGES SENT TO CUSTOMERS WHO ORDER ONLINE



Good: 4
Bad: 364
Non-pizza: 195
Uploaded: 0
FPS: 0

Reload config file

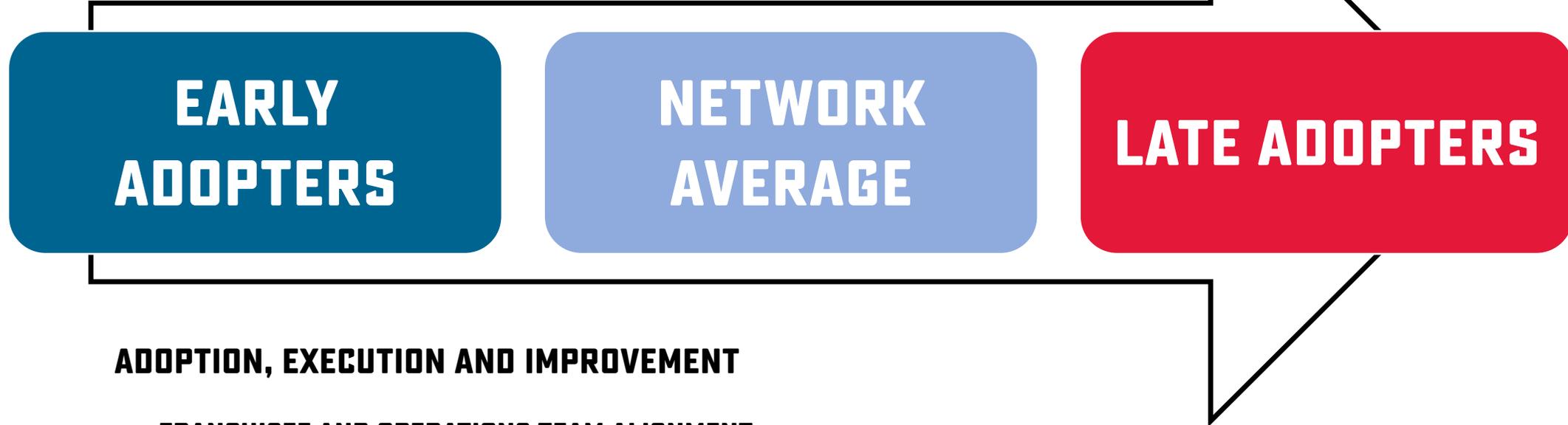
Force good

Record

Failed to upload to server: <http://0.0.0.0:8092>



THE ADOPTION PROCESS



ADOPTION, EXECUTION AND IMPROVEMENT

- **FRANCHISEE AND OPERATIONS TEAM ALIGNMENT**
 - INCORPORATING PIZZA CHECKER FOR 'SCORECARD' BONUS SYSTEM
 - WEEKLY RANKINGS SHARED INTERNALLY
 - 1:1 FOLLOW-UPS FOR STORES FALLING BELOW PEERS
- **PIZZA CHECKER INCORPORATED INTO OER PROCESS**
 - FOCUSED ON STORES WITH BELOW AVERAGE PIZZA QUALITY
 - IDENTIFYING STORES WITH POOR CUSTOMER OUTCOMES





IN THE PIPELINE

GRADING V2

INCREASE ACCURACY OF GRADING ACROSS ALL PIZZAS AND CRUST TYPES

SMARTER MATCHING

INCREASE THE % OF PIZZAS MATCHED TO ORDERS AND REDUCE INCORRECT MATCHING AND PARTIAL MATCHES

PIZZA CHECKER SCORES DISPLAYED ON MAKELINE

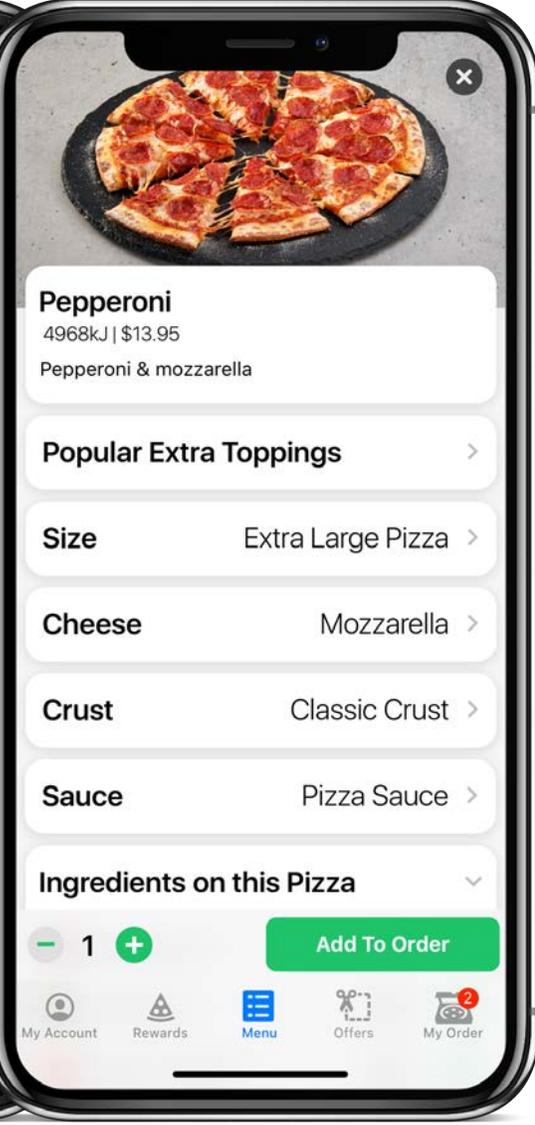
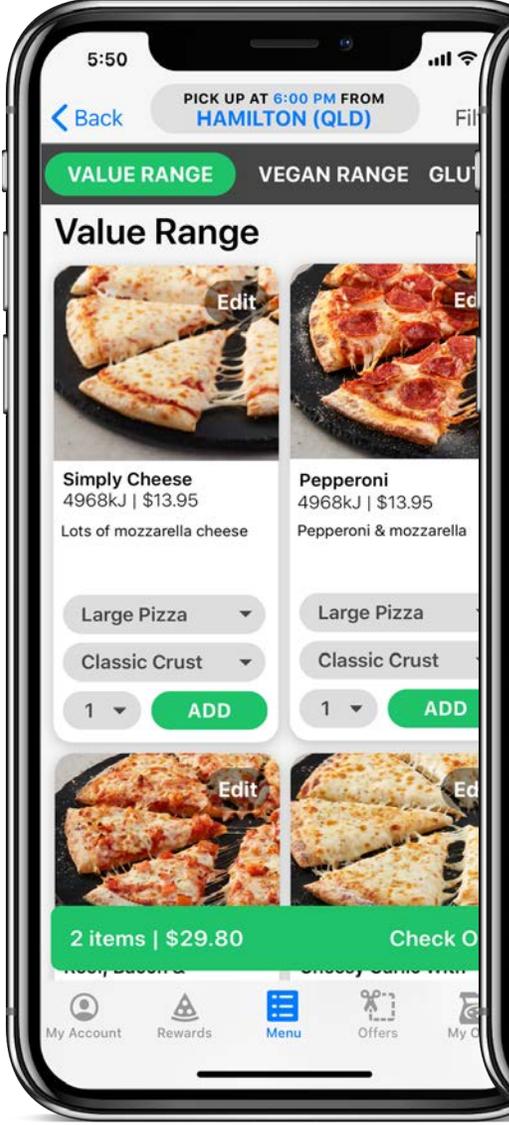
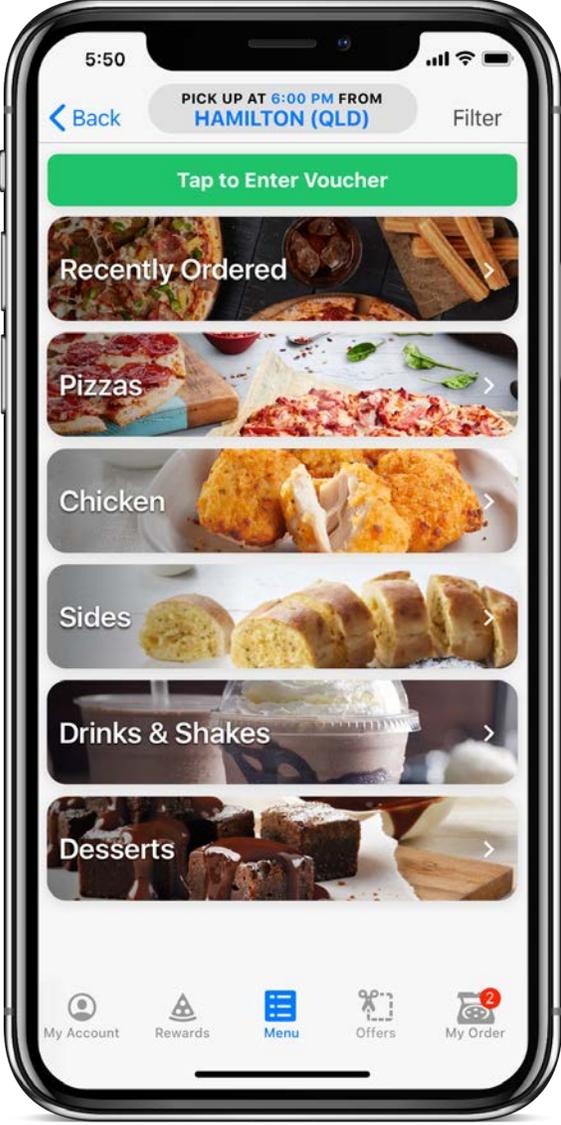
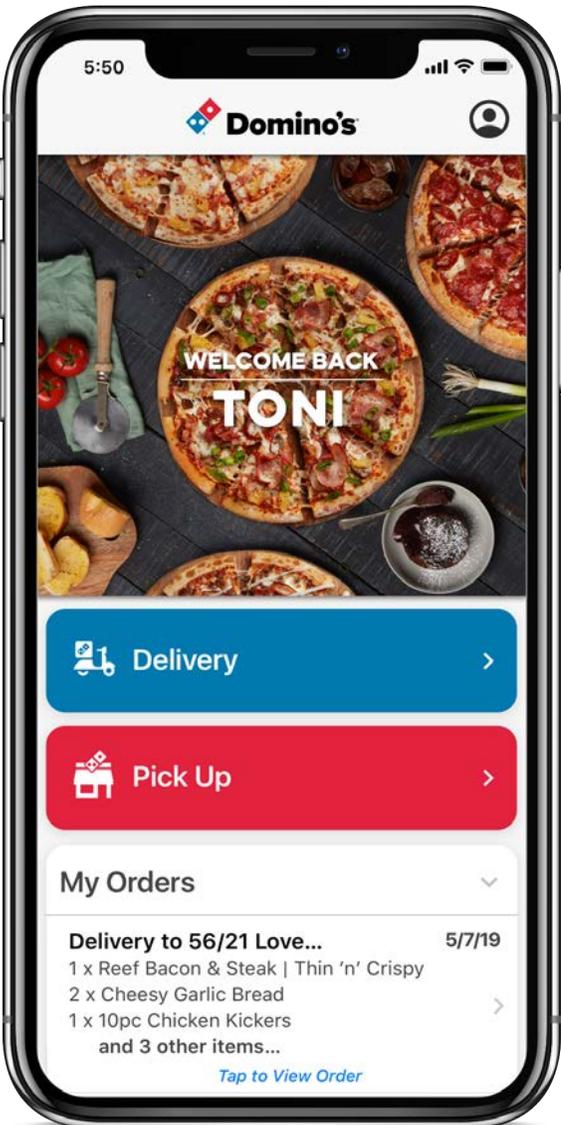
DISPLAY THE PIZZA CHECKER SCORES AS A LIVE FEED ON THE MAKELINE TO EMPOWER TEAM MEMBERS

CRUST RECOGNITION

IDENTIFY DIFFERENT BASE TYPES



TECHNOLOGY IS INCREASINGLY EXPECTED





JAPAN

JOSH KILIMNIK

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

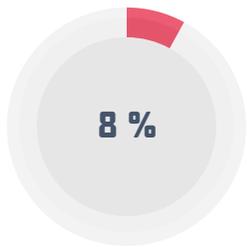
GERMANY

LUXEMBOURG

DENMARK

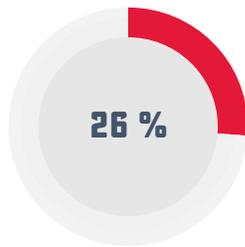
JAPAN - DELIVERY PIZZA MARKET POSITION

STORE COUNT TREND OF JAPAN PIZZA DELIVERY CHAINS

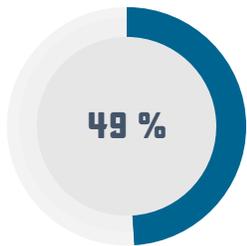


2007

MARKET SHARE OF **DOMINO'S**

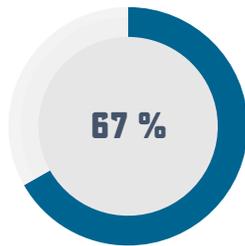


2019 YTD

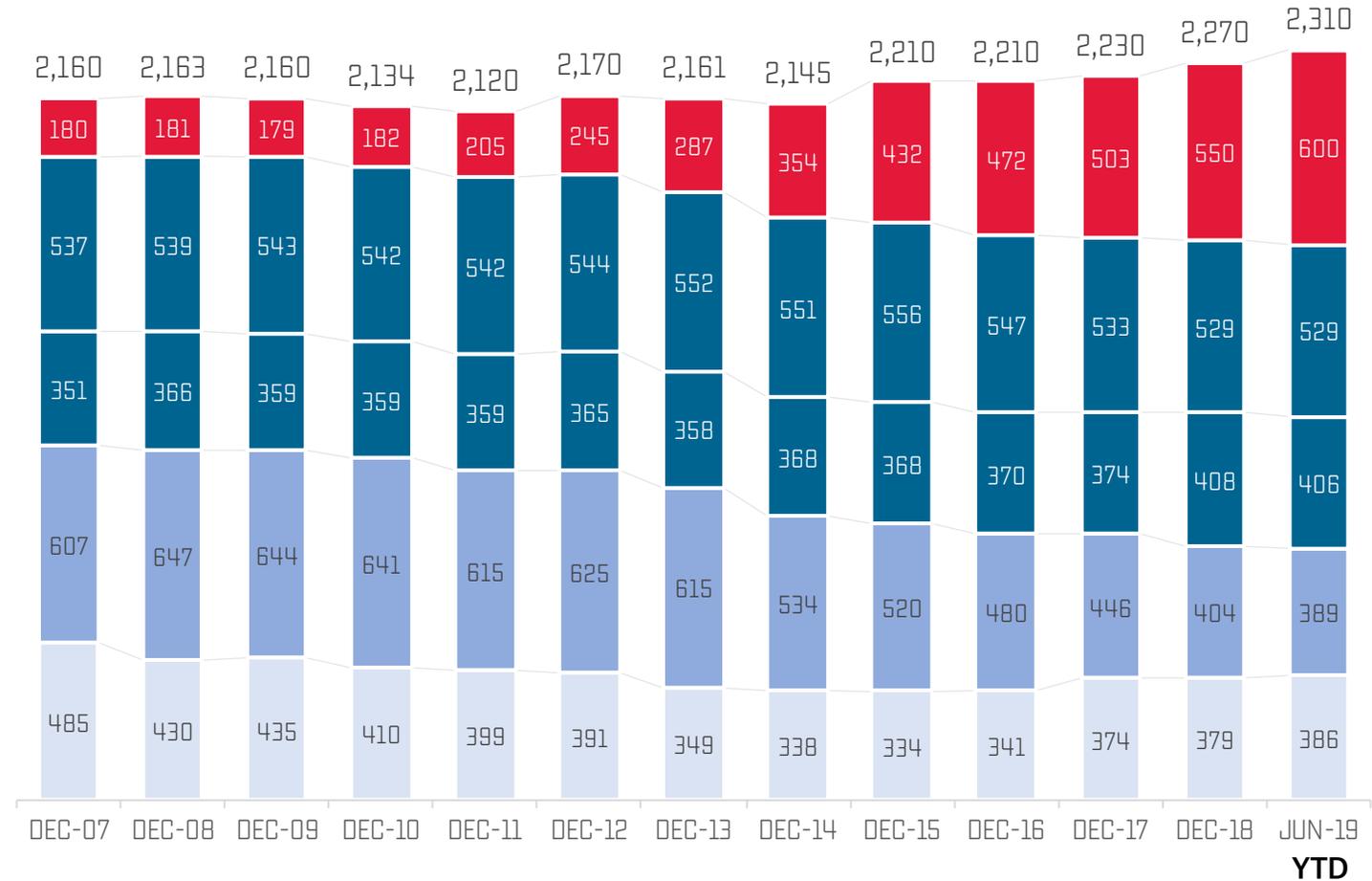


2007

MARKET SHARE OF **3 MAJORS**



2019 YTD



MIDDLE-SIZED CHAINS

SMALL-SIZED CHAINS

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

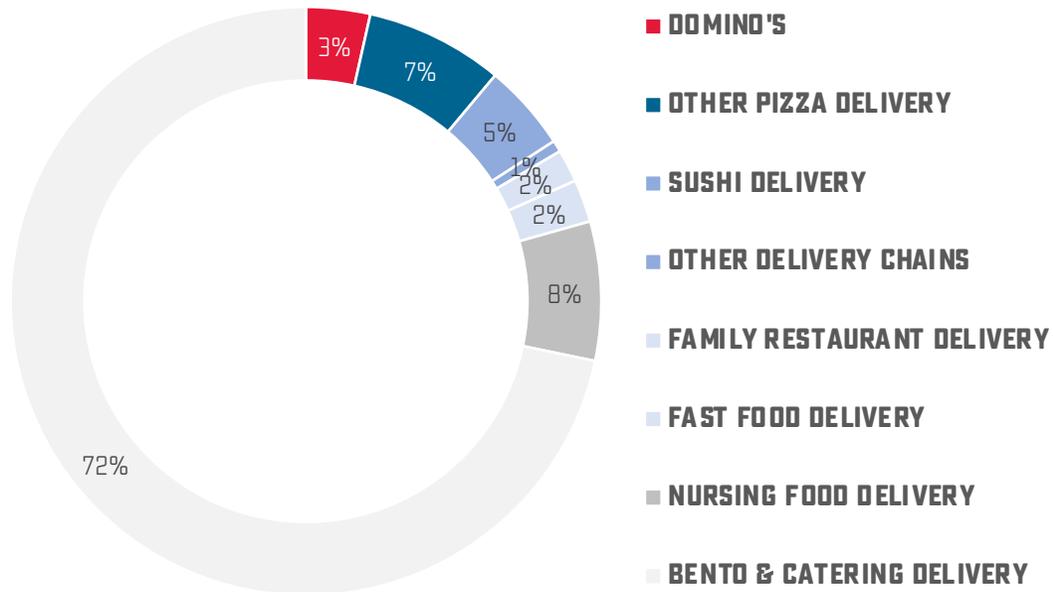
LUXEMBOURG

DENMARK

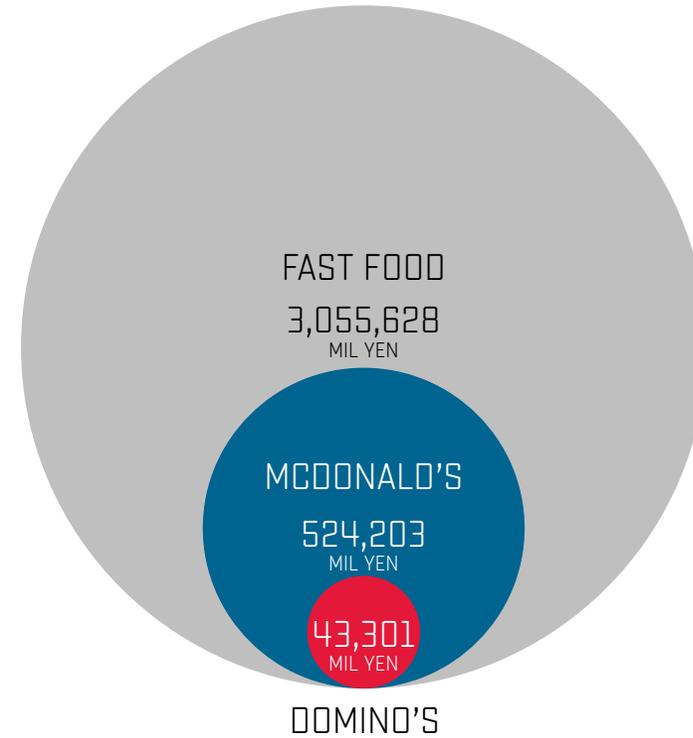


JAPAN - MARKET POSITION

MARKET SHARE OF FOOD DELIVERY
(REVENUE)



REVENUE COMPARISON

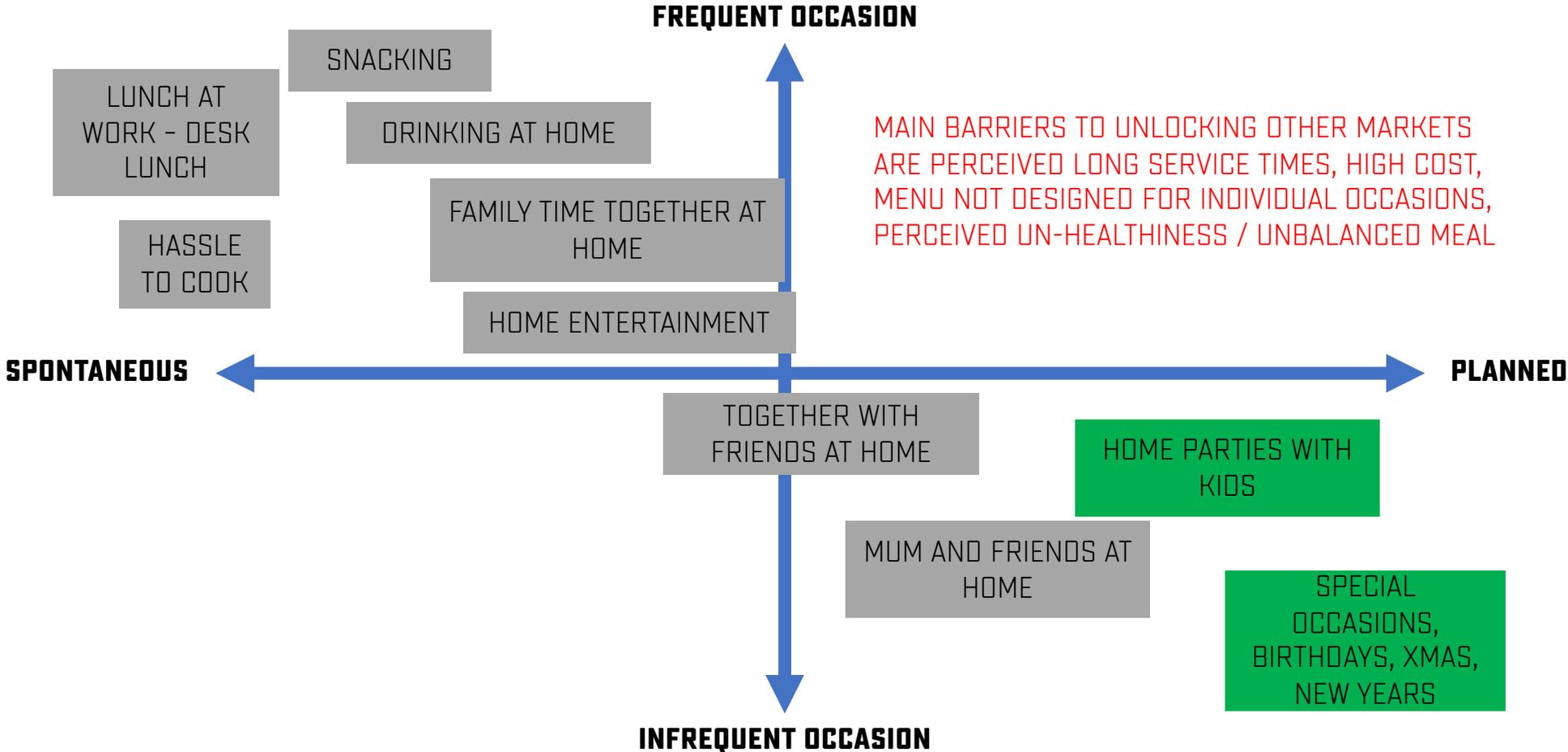


Note: As of December 2018, researched by Fuji Keizai



JAPAN - BARBELL STRATEGY

PIZZA IS ONLY TAKING A SMALL SLICE OF THE MARKET



NEW RANGE PRICING



AMERICAN CLASSIC

PICK-UP: ¥799-

DELIVERY: ¥1,800-



NEW YORKER RANGE

PICK-UP: ¥2,500-

DELIVERY: ¥3,300-



SUPERSTAR RANGE

PICK-UP: ¥3,800-

DELIVERY: ¥3,800-

* AVAILABLE FOR BOGO



JAPAN - NEW PRODUCTS

- HISTORICALLY MENU OFFERINGS HAVE ONLY CATERED FOR THE ONE-OFF/CELEBRATION
- WE ARE ADDING A BARBELL STRATEGY, WITH TWO NEW RANGES TO TARGET COMPETITOR MARKET SHARE



AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

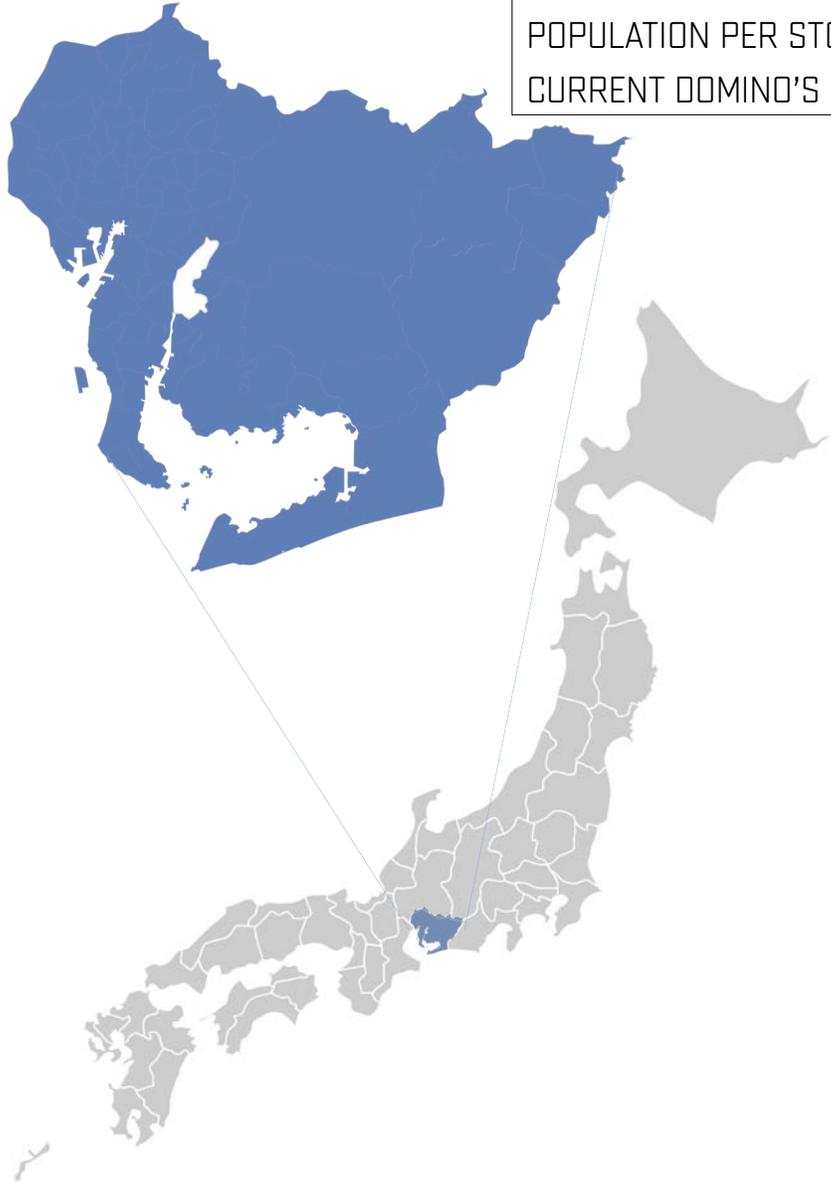
JAPAN

GERMANY

LUXEMBOURG

DENMARK





NAGOYA

POPULATION: **7.5MIL**

POPULATION PER STORE: **142,000**

CURRENT DOMINO'S STORE: **53**

JAPAN FORTRESSING - NAGOYA

NEW STORES

NEW STORES IN BOTH EXISTING BUSINESS AREAS AND WHITE SPACES WHERE NO DOMINO'S STORE OPERATES YET

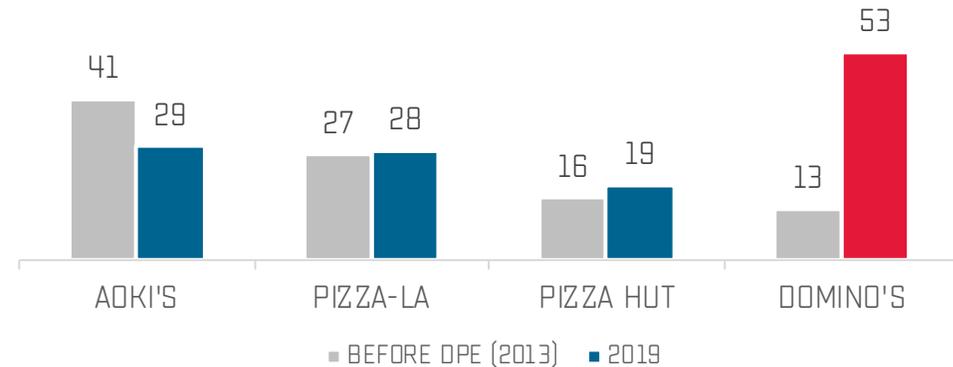
RELOCATION

RELOCATED STORES TO OPTIMISE DELIVERY OPERATIONS AND NEW STORE ROLLOUT

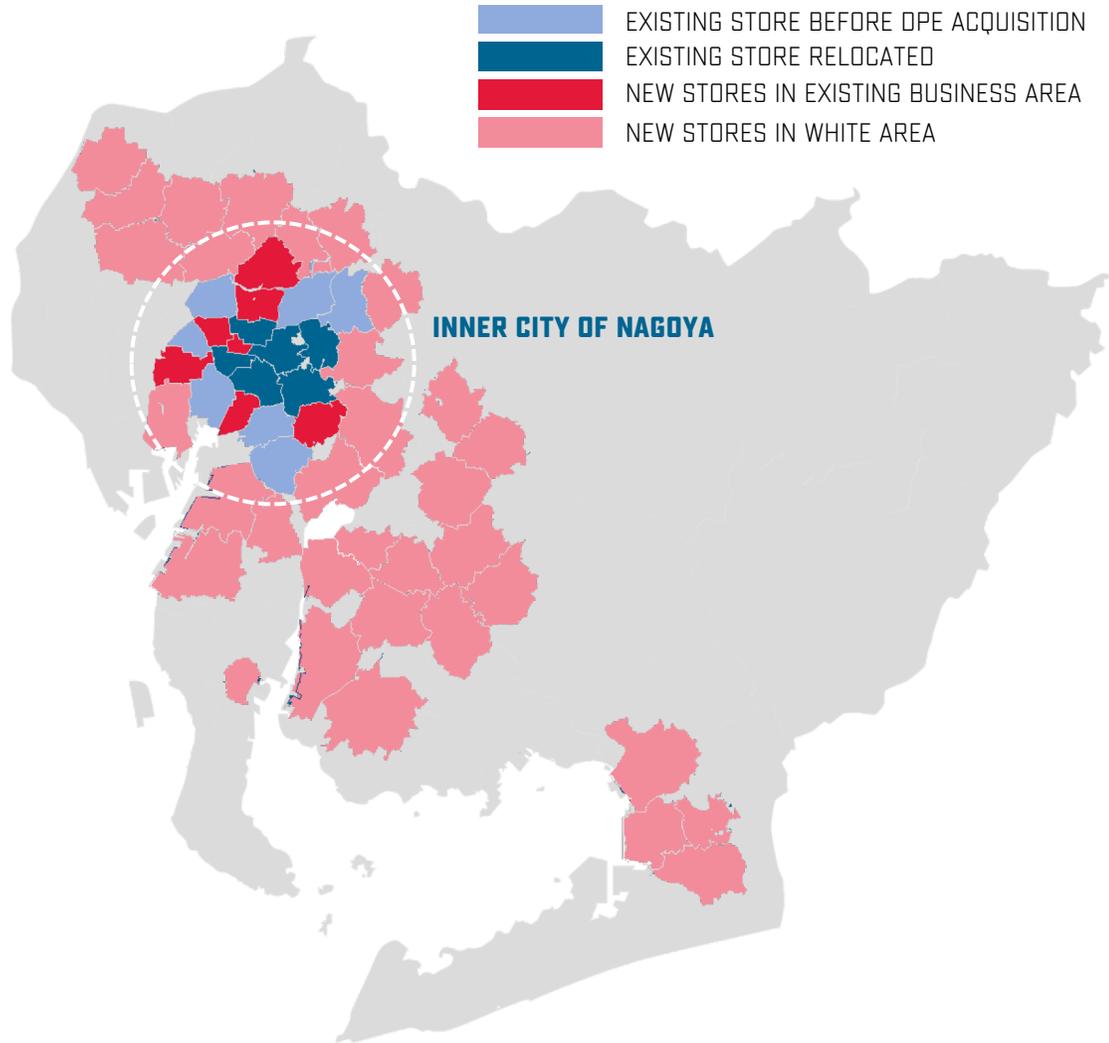
COMPETITOR STORE CLOSE

BY MAKING OUR STORES CLOSE TO CUSTOMERS, COMPETITORS STORES HAVE EXITED FROM THE MARKET

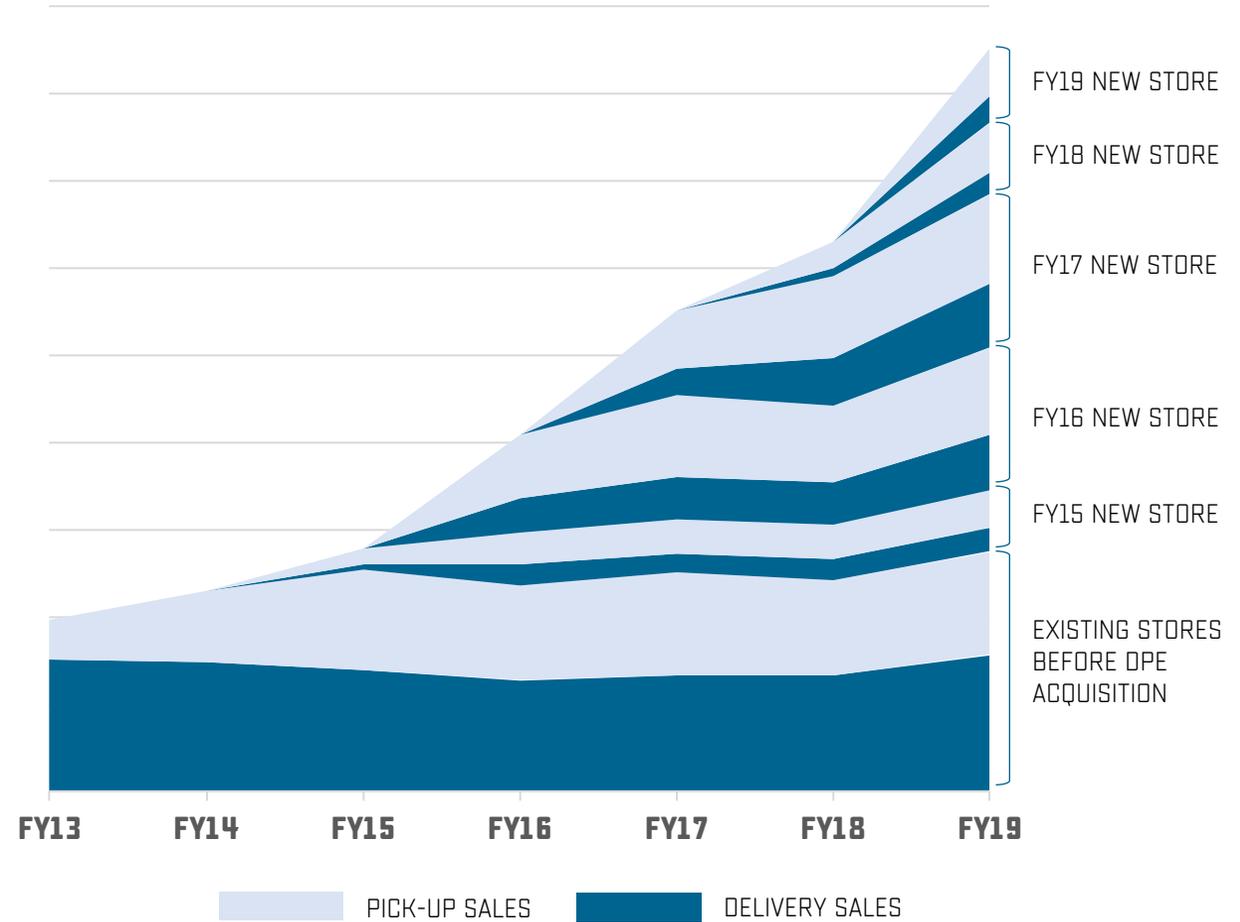
NAGOYA STORE GROWTH



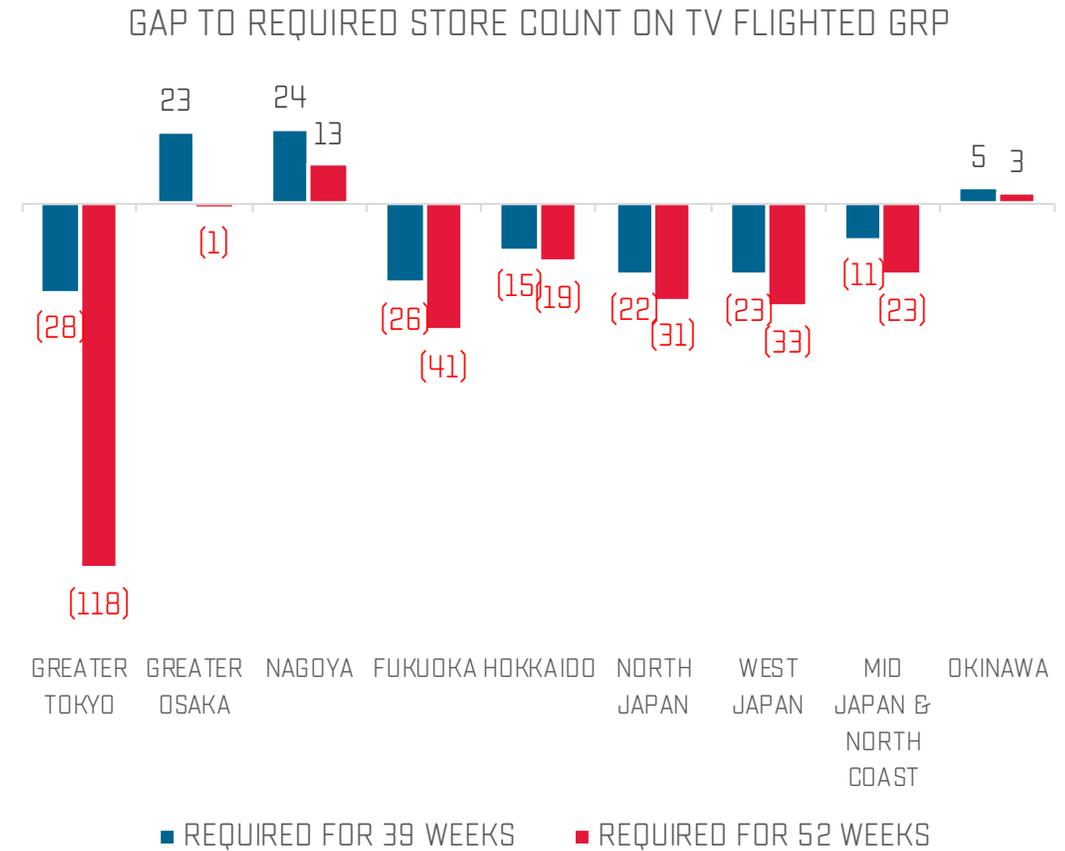
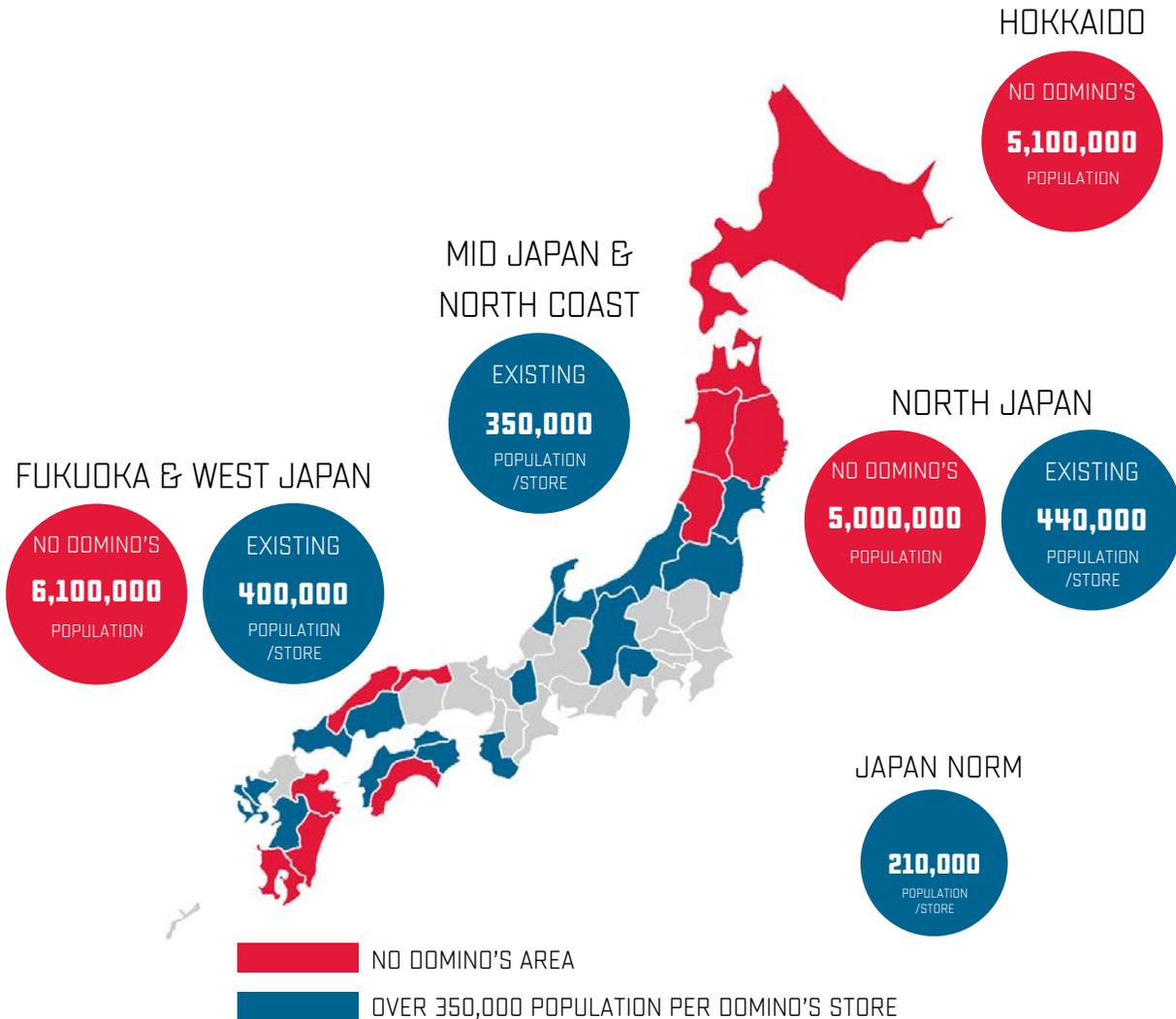
JAPAN - FORTRESSING



ACCUMULATIVE SALES OF NAGOYA



OTHER MARKETS - FURTHER OPPORTUNITIES



PROJECT 3TEN

14
STORES

UNDER 10-MIN. DELIVERY

14 JAPAN STORES ALREADY
ACHIEVE UNDER 10-MIN
DELIVERY WEEKLY.

19.2
MIN

AVERAGE DELIVERY TIME

AVERAGE DELIVERY TIME OF
350 CORPORATE STORES IS
NOW 20-22 MINUTES AND THE
CURRENT RECORD IS 19.2 MIN.

40%
BY 2020

E-BIKE

FOCUSING ON E-BIKES ESPECIALLY IN INNER CITY
STORES TO REALISE FASTER DELIVERY, BETTER
RETENTION, AND MORE PROFITABILITY.
40% EBIKE IN TOKYO BY 2020 AND 60% BY 2022



TECHNOLOGIES DRIVE SALES

15%

OWNED MEDIA

CURRENT SALES THROUGH OWNED MEDIA, EDM AND COUPON APP, IS NOW APPROXIMATELY 15% OF TOTAL SALES

900,000+
DOWNLOADS

COUPON APP

COUPON APP HAS BEEN ALREADY DOWNLOADED INTO OVER 900K DEVICES OF CONSUMERS.



Q&A

