



Domino's Pizza Enterprises Limited
1/485 Kingsford Smith Drive
Hamilton, QLD, Australia 4007
ACN: 010 489 326
www.dominos.com.au

30 November 2020

Domino's Pizza Enterprises Investor Day

Domino's Group CEO and regional CEOs will host an Investor Day today: Monday, 30 November.

The format will include members of management delivering pre-recorded presentations for 90 minutes from 4pm (Brisbane time).

The presentations are attached to this announcement and from 4pm the video will be available here: <https://investors.dominos.com.au/presentations/2020/11/18/virtual-investor-day-november-30>

A live Q&A will follow at 5:30pm (Brisbane time).

Live Q&A speakers:

- Don Meij (Group CEO & Managing Director)
- Andre Ten Wolde (Europe CEO)
- Nick Knight (ANZ CEO)
- Josh Kilimnik (Japan CEO)
- Michael Gillespie (Group Chief Digital and Technology Officer)

To register the Live Q&A: https://dominos.zoom.us/webinar/register/WN_iqlpTeekRR-i6RrjEVQH6w

Questions can be lodged through the Zoom platform during the Q&A.

No trading update will be provided during this virtual Investor Day.

This will be the last management presentation prior to the release of Domino's Half Year results scheduled for Wednesday, February 17, 2021.

This release has been authorised for release by Group CEO & Managing Director, Don Meij.

END

For further information, contact Nathan Scholz, Head of Investor Relations at investor.relations@dominos.com.au or on +614 1924 3517.



DOMINO'S PIZZA ENTERPRISES LTD

INVESTOR DAY

30 NOVEMBER 2020



INVESTOR DAY

DON MEIJ



WELCOME



THANK

You

Two vertical bars, one red and one blue, are positioned to the left of the text.

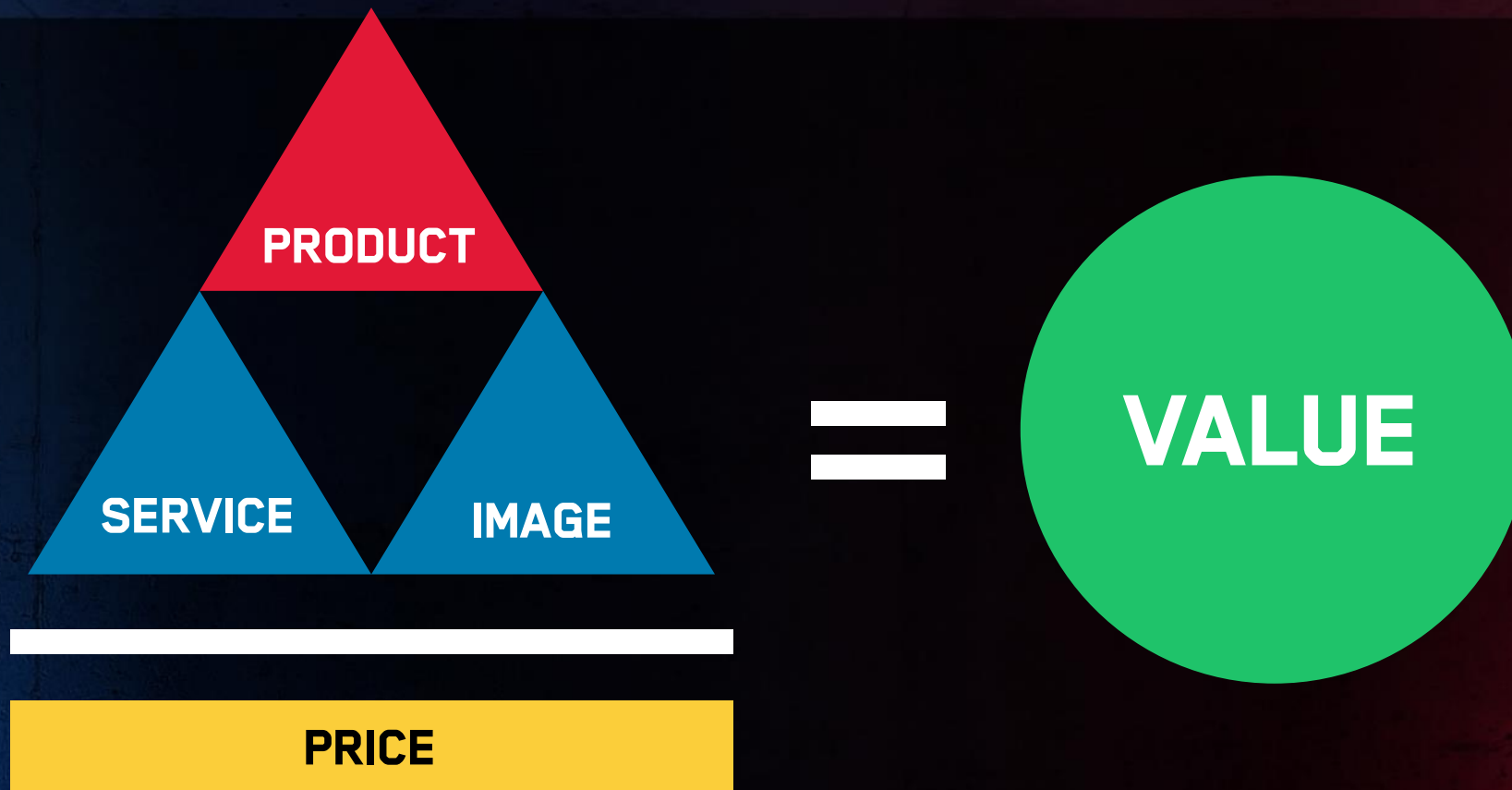
**HOW DO WE
RETAIN
OUR NEW
CUSTOMERS?**

**PEOPLE FIRST,
ALWAYS**



FAST FORWARD

THE AGE OF DELIVERY





Data driven customer insights

Pat Nestor

GROUP HEAD OF STRATEGY AND INSIGHTS



- ***IN FY20***
 - ***MORE THAN 3 ORDERS EVERY SECOND!***
 - ***209M TOTAL PIZZAS***
 - ***ENOUGH TO CIRCLE THE GLOBE 1.5 TIMES!***
- ***MOST POPULAR IS PEPPERONI***
 - ***...WHICH IS ALSO THE FAVORITE PIZZA OF JOHN SMITH...***

...WHO TYPICALLY ORDERS...

- **EVERY OTHER THURSDAY**
- **DELIVERY**
- **PAYS BY CREDIT CARD**
- **DEAL ONLY**
- **DESSERT SOMETIMES**
- **LOYALTY MEMBER**

DPZ → DPE



WORKED WITH DOMINO'S MARKETS AROUND THE GLOBE¹²

STRATEGY & INSIGHTS

**DATA
WAREHOUSE**

**BUSINESS
INTELLIGENCE**

**DATA
SCIENCE**

MINING ACTIONABLE INSIGHTS FROM MOUNTAINS OF DATA

DATA DEMOCRATIZATION

DATA DEMOCRATIZATION



Power BI

CUSTOMER DATA & ANALYTICS

**CUSTOMER
EXPERIENCE**

**CUSTOMER
ANALYTICS**

**CUSTOMER
DATA**

ACTIVATION

CLASSIFICATION

IDENTIFICATION

A dark wooden desk with a black tablet and a pen. The tablet is tilted and displays a green line graph on a grid. A black pen lies on a grey rectangular object next to the tablet.

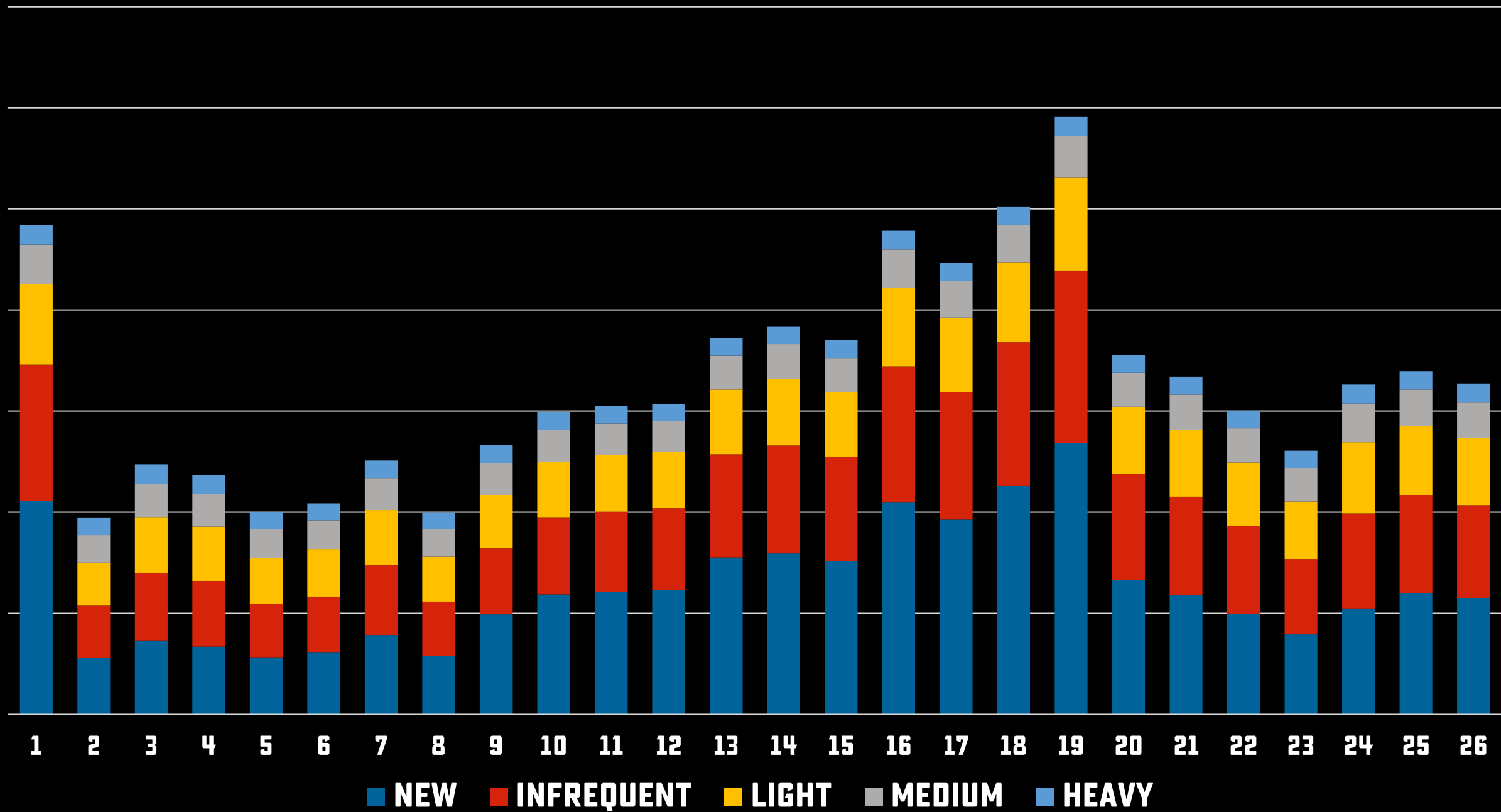
**EVERY INTERACTION
IS AN OPPORTUNITY**

EVERY INTERACTION
IS AN **OPPORTUNITY**



VALUE  **REPEAT**





**AS OUR DELIVERY TIMES DECREASE,
WE'VE BEEN ABLE TO MEASURE**

**CUSTOMER
CHURN
DECREASES**

**CUSTOMER
ORDER
FREQUENCY
INCREASES**

**STORE SALES
INCREASE**

**CUSTOMER
EXPERIENCE**

**CUSTOMER
ANALYTICS**

**CUSTOMER
DATA**

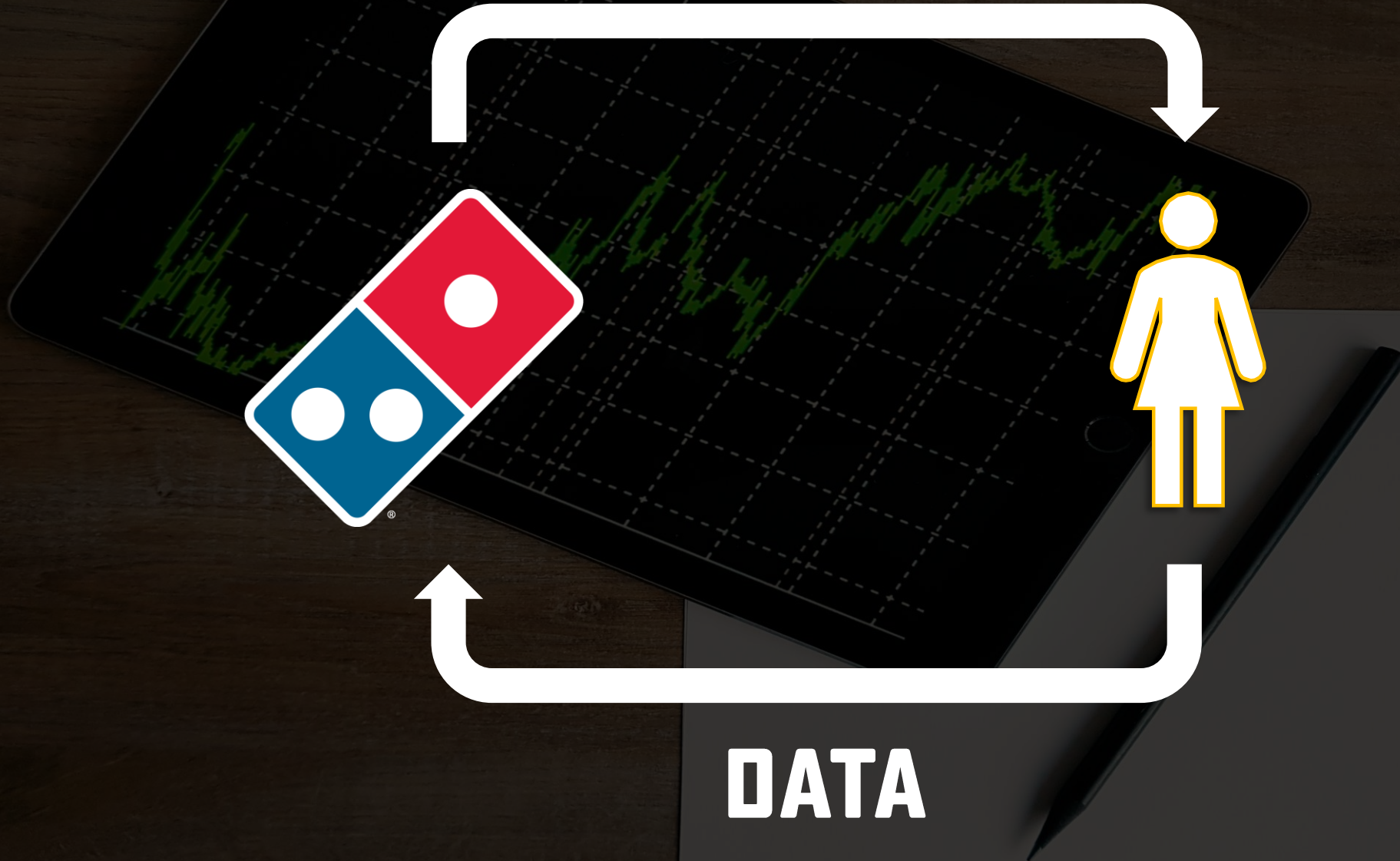
ACTIVATION



CLASSIFICATION

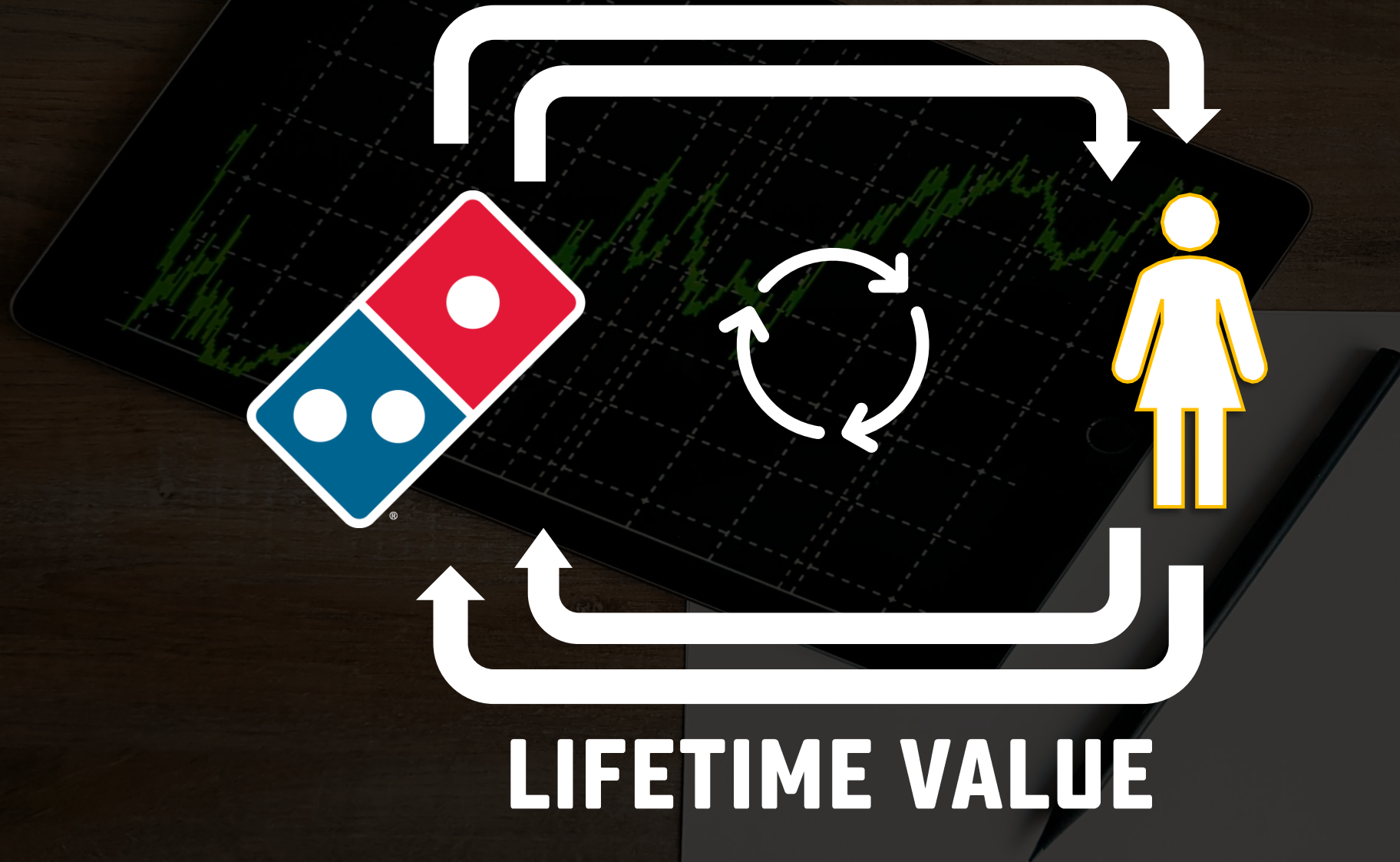
IDENTIFICATION

VALUE: P/S/I



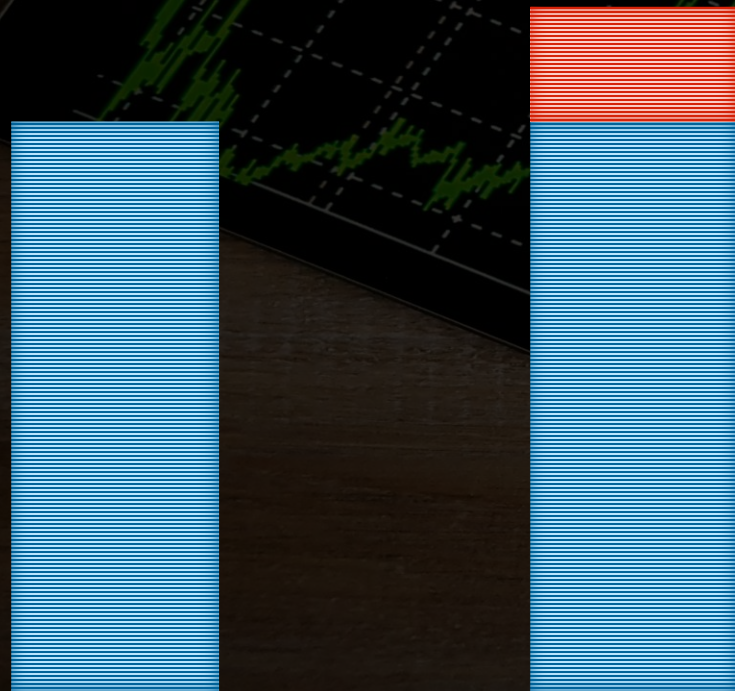
DATA

CONSUMER VALUE



LIFETIME VALUE

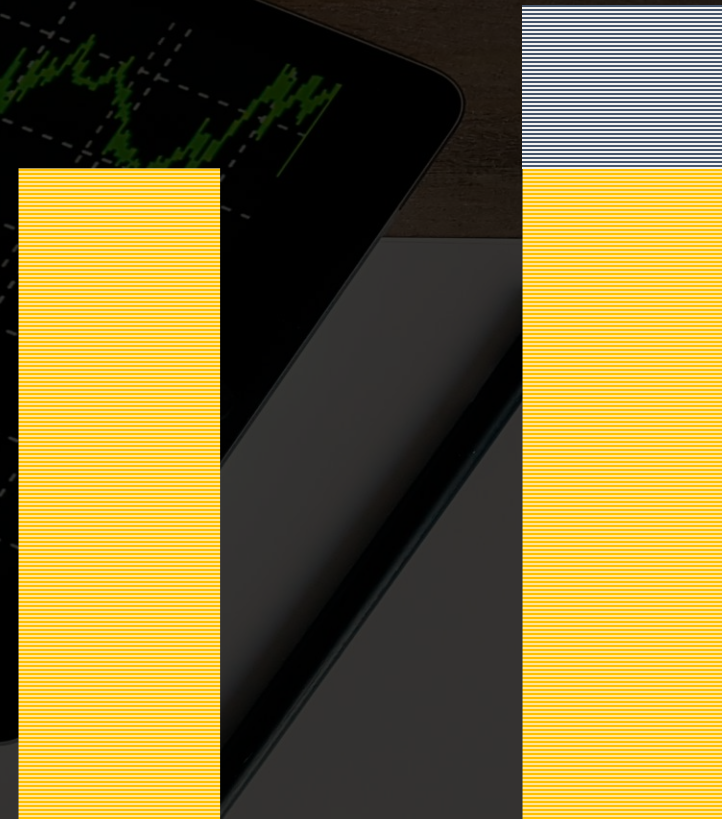
ANNUAL ORDERS PER CUSTOMER



NON-MEMBER

LOYALTY MEMBER

ANNUAL SPEND PER CUSTOMER



DIGITAL CUSTOMER

APP USER

**CUSTOMER
EXPERIENCE**

**CUSTOMER
ANALYTICS**

**CUSTOMER
DATA**

ACTION

INSIGHTS

DATA



Australia/New Zealand update

Allan Collins

CHIEF MARKETING OFFICER, AUSTRALIA/NEW ZEALAND

Agenda

1. Macro market dynamics
2. Size of the prize
3. Who do we target?
4. Activating Core Drivers
5. Measuring success



1. Macro Market Dynamics



AT HOME

A photograph of a family working from home. A woman with dark hair, wearing a blue and white striped t-shirt, is seated at a desk, talking on a white mobile phone. In front of her is a laptop displaying a document. To her left, a young boy with glasses and a blue long-sleeved shirt is sitting on the floor, playing with a red and green toy. In the background, a man with dark hair, wearing a light blue shirt, is sitting at a desk, looking at a laptop. The room has white shelves filled with books and other items. The text "AT HOME" is overlaid in large blue letters on the left side of the image.

Digital hyper-connection has compressed years of behaviour into a few months

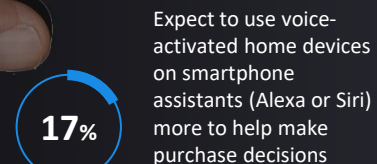
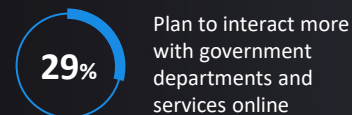
Daily life

One in two...

Agree technology is helping me get more out of life during the C-19 pandemic

Say the way they use tech in daily life has changed somewhat/ significantly

Optimistic about the way they will use technology in the future



Shopping



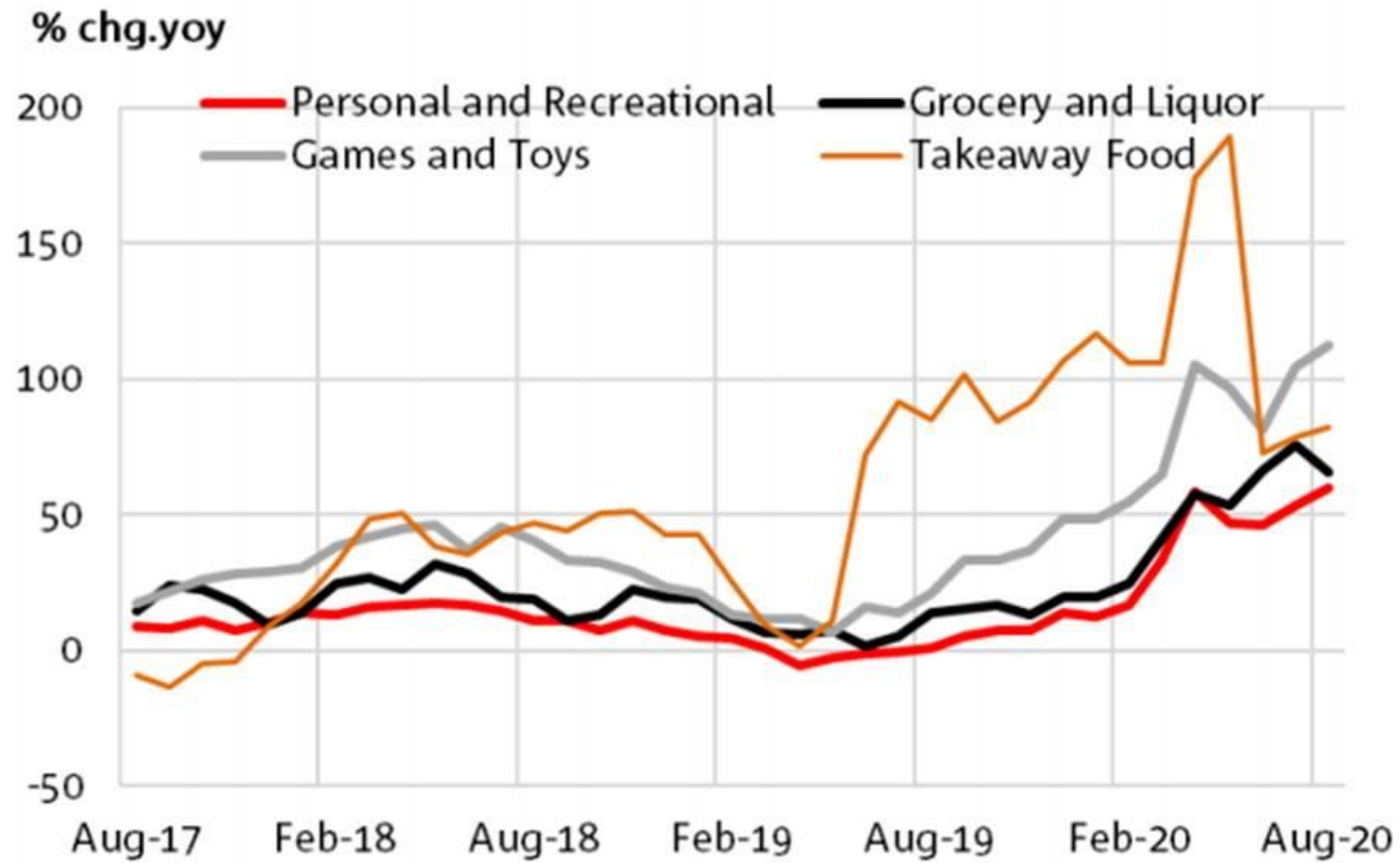
For...



Continued growth in online behaviour...

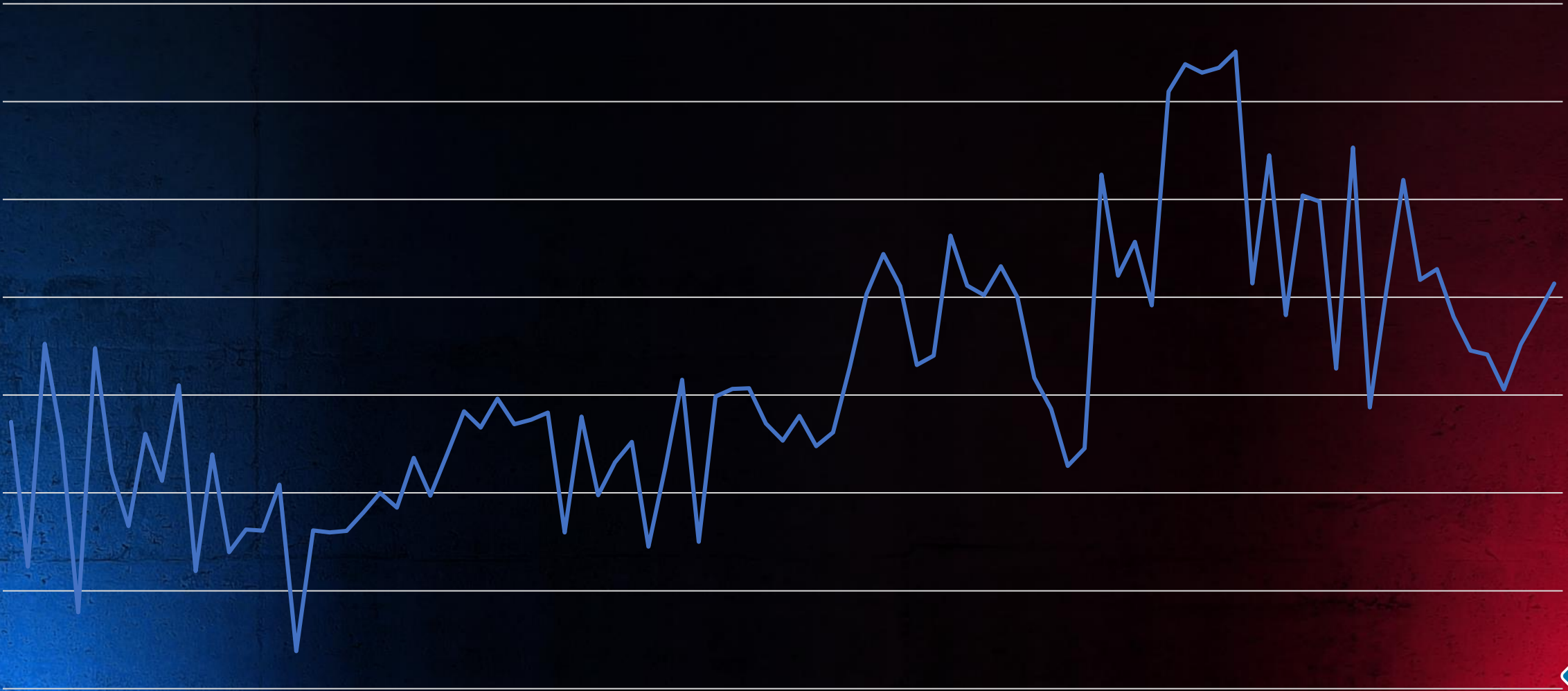


Online Growth

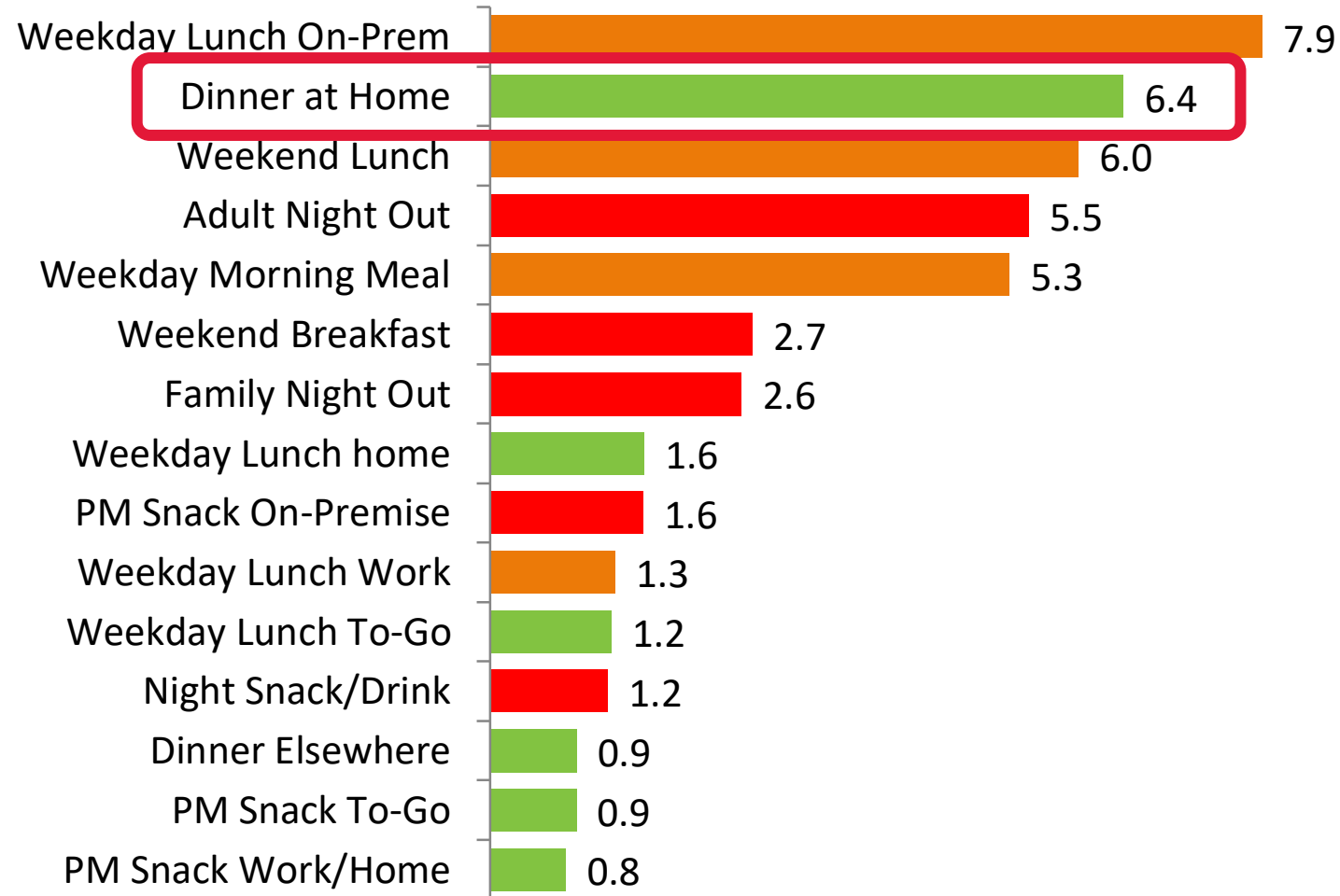


Domino's is also experiencing online growth

AU Online SSS



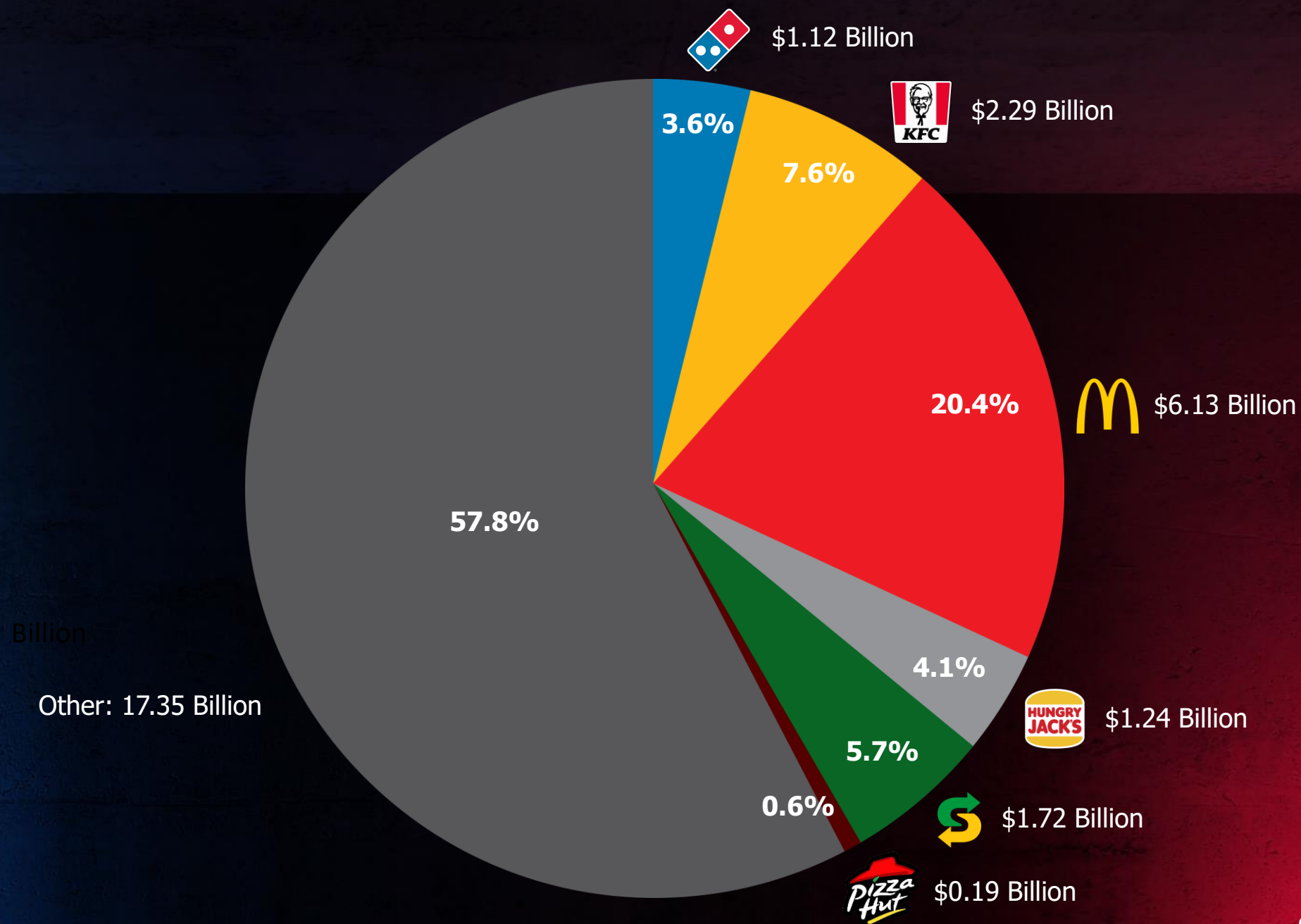
Dinner at home is the largest growing occasion



2. Size of the prize



QSR



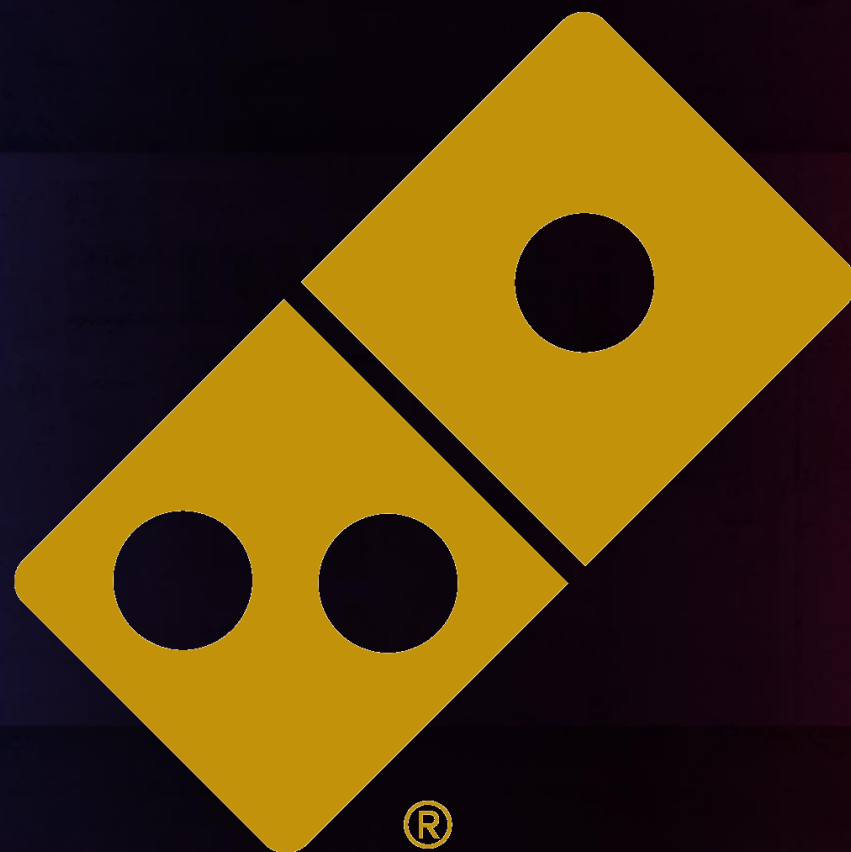
Source: The NPD Group/Crest AU, Year End March 2020

We are the
delivery experts,
it's always been
in our DNA...



Designed to be **delivered**





®



3.

**Who do we target
to maximise the opportunity?**



We don't go after
the competition

We go after
the consumer



Consumer Group to Attract

<p>■ Lovers</p> <p>Continue</p> <p>■ Frequent Likers</p>	<p>Love Dominos = potential advocates. Foster positive advocacy for Domino's</p>
<p>■ Infrequent Likers</p> <p>Attract</p> <p>■ Frequent Ambivalents</p> <p>■ Infrequent Ambivalents</p>	<p>Like Domino's and eat frequently. Build greater brand commitment. Aim to convert to Lovers</p> <p>Like Domino's but don't eat frequently. Encourage more frequent Domino's purchases</p> <p>Eat Domino's occasionally but feel ambivalent towards it. Encourage more frequent purchases & build commitment</p> <p>Don't eat Domino's often and feel ambivalent towards it. Encourage more frequent purchases & build commitment</p>
<p>■ Dislikers</p> <p>■ Haters</p> <p>IGNORE</p> <p>■ Unawares</p>	<p>Don't like Dominos and only eat it very infrequently. Reduce their negative WOM, and ignore them</p> <p>Hate Domino's and eat it only rarely, if at all. Reduce their negative WOM, and ignore them. Not likely to move them.</p> <p>Haven't heard of Domino's. Increase awareness?</p>

Strategy for the Opportunity Group

- Value motivated
- Motivated by fresh ingredients
- Higher proportion of families



4. **Activating Core Drivers**



Product + Service + Image

Price

=

Value

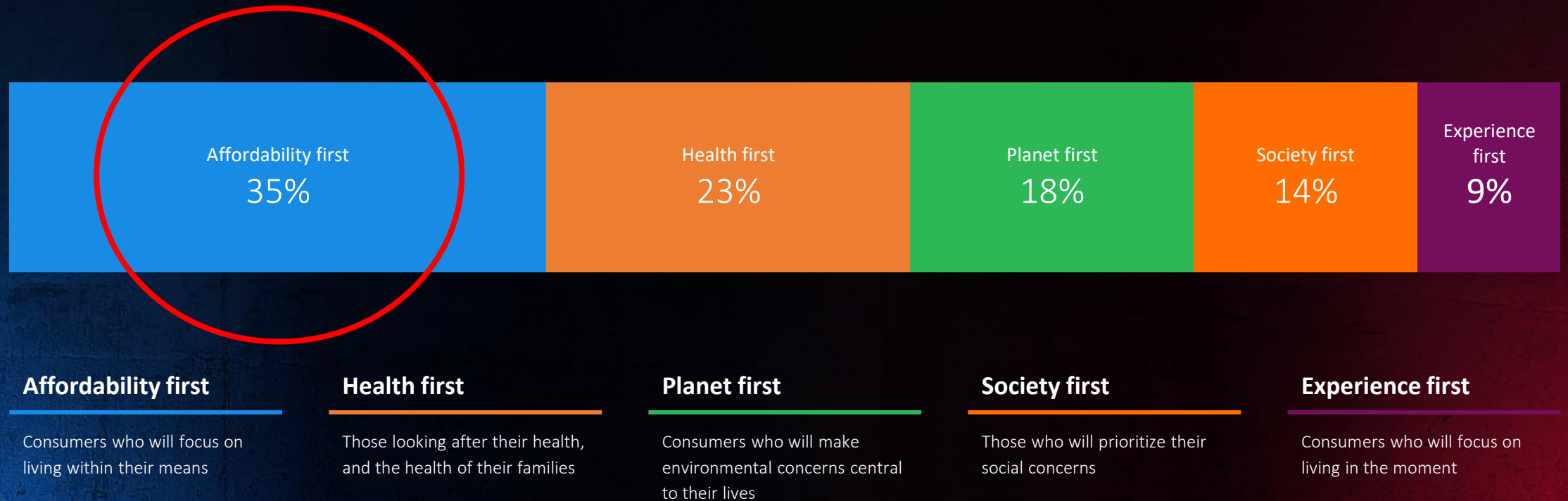


1. Price

- Value champion



The future consumer: **Beyond COVID-19** segmentation



\$5 Everyday Value Messaging



EVERY DAY
VALUE RANGE PIZZAS

FROM **\$5** **EACH**
PICK UP

**NO VOUCHER
REQUIRED**



The advertisement is a vertical yellow rectangle with a wood-grain texture. At the top, the words "EVERY DAY" are in a white, bold, italicized font on a black background. Below that, "VALUE RANGE PIZZAS" is in a black, bold, sans-serif font. In the center, "FROM" is in a small, italicized font, followed by a large "\$5" in a bold, black font. To the right of the "\$5", "EACH" is in a bold, sans-serif font, and "PICK UP" is in a smaller, bold, sans-serif font below it. At the bottom, a red banner with a white border contains the text "NO VOUCHER REQUIRED" in a white, bold, sans-serif font. The Domino's logo, a red and blue diamond shape with white dots, is in the bottom right corner.





Conditions apply. Limited time only in selected stores. 15% surcharge applies on public holidays. 10% surcharge applies on Sundays.

Giving More

- **XL support layer**

Driving further by incorporating into price vs charging extra \$3. Consumers hate additional charges and taxes



EVERY DAY
VALUE PIZZAS

EXTRA LARGE

FROM
\$8
*** EACH PICK UP**

NO VOUCHER REQUIRED

.....



Product + Service + Image

Price

=

Value



2. Service

- Drive pick up layer
- Drive delivery layer
- Grow digital service



Online Pick Up Layer – Car Park Delivery







Online Delivery Layer



**ANY
LARGE
PIZZA** **\$15**

PREMIUM, TRADITIONAL & VALUE

DELIVERED

© Copyright DPE Ltd. 2019

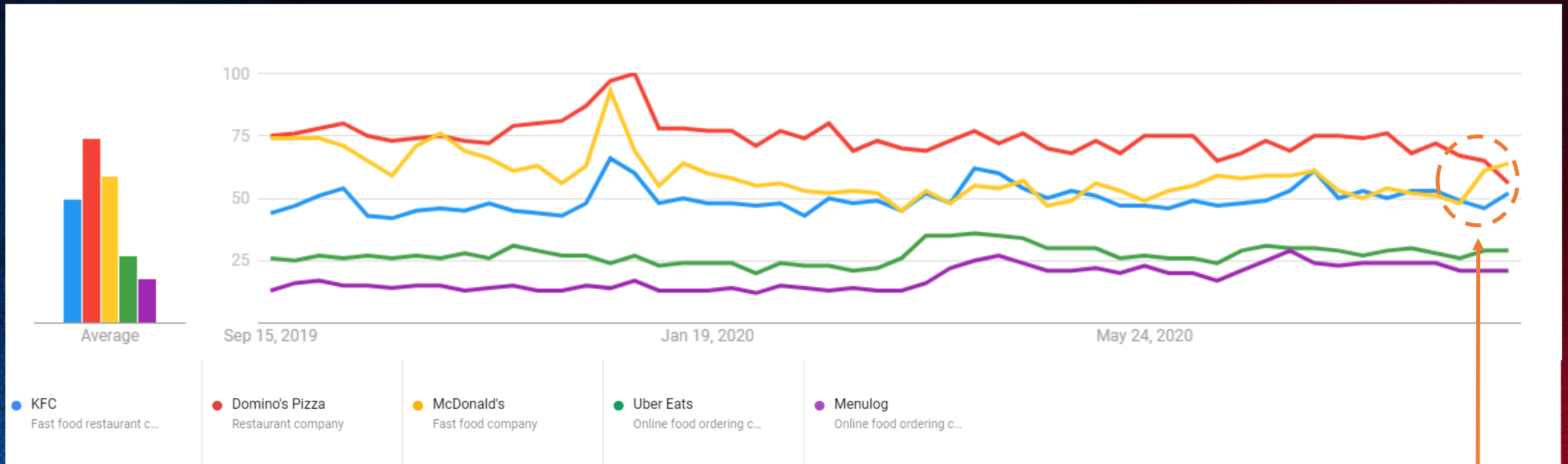
Confidential. For testing purposes only.

© 2004 Blackwell Publishing Ltd *Journal of Internal Medicine* 255: 105–112

Grow Digital Service



App Share



Monopoly 2020

Download Domino's App & Claim A Large Free Pizza With Any Delivery

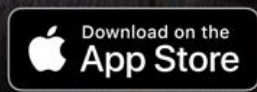


DOWNLOAD THE
DOMINO'S APP
CREATE AN ACCOUNT & CLAIM A
FREE PIZZA*
WITH ANY LARGE PIZZA PURCHASE



**NEW APP
USERS
ONLY**

DOWNLOAD & REDEEM NOW

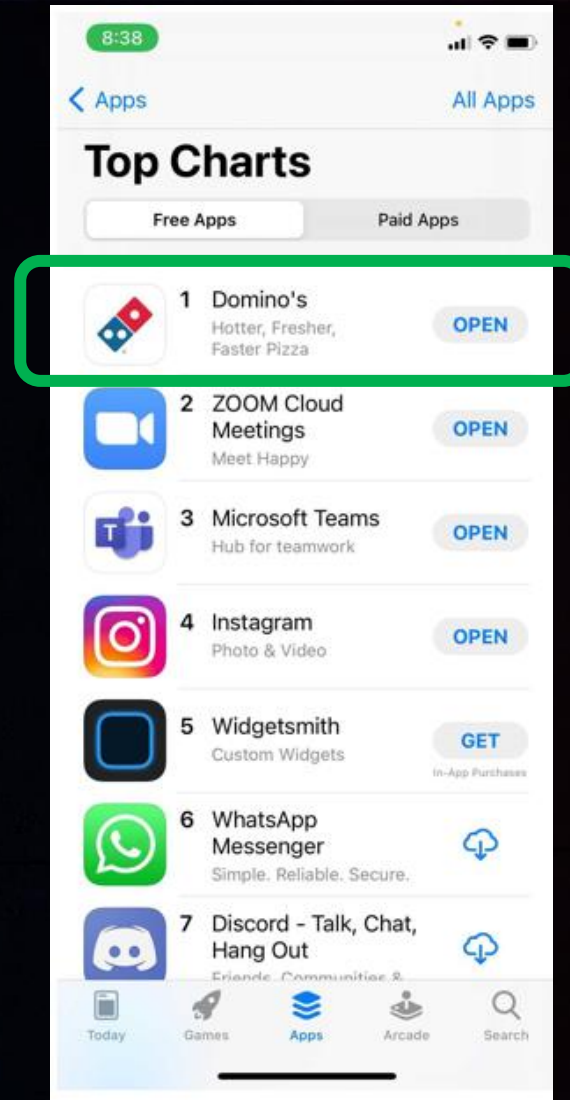


*Conditions apply. Limited time only. Available for New App users only. Voucher code valid for one week from date of issue. Voucher code is for buy one Large Pizza and get one Large Pizza Free. One voucher code per unique account. Voucher code is sent via text message and valid for single use through the Domino's App only. Selected stores only. Valid for pick up or delivery. Minimum delivery order \$22. Full terms at: <https://www.dominos.com.au/about-us/contact-us/terms-conditions>





No.1 App

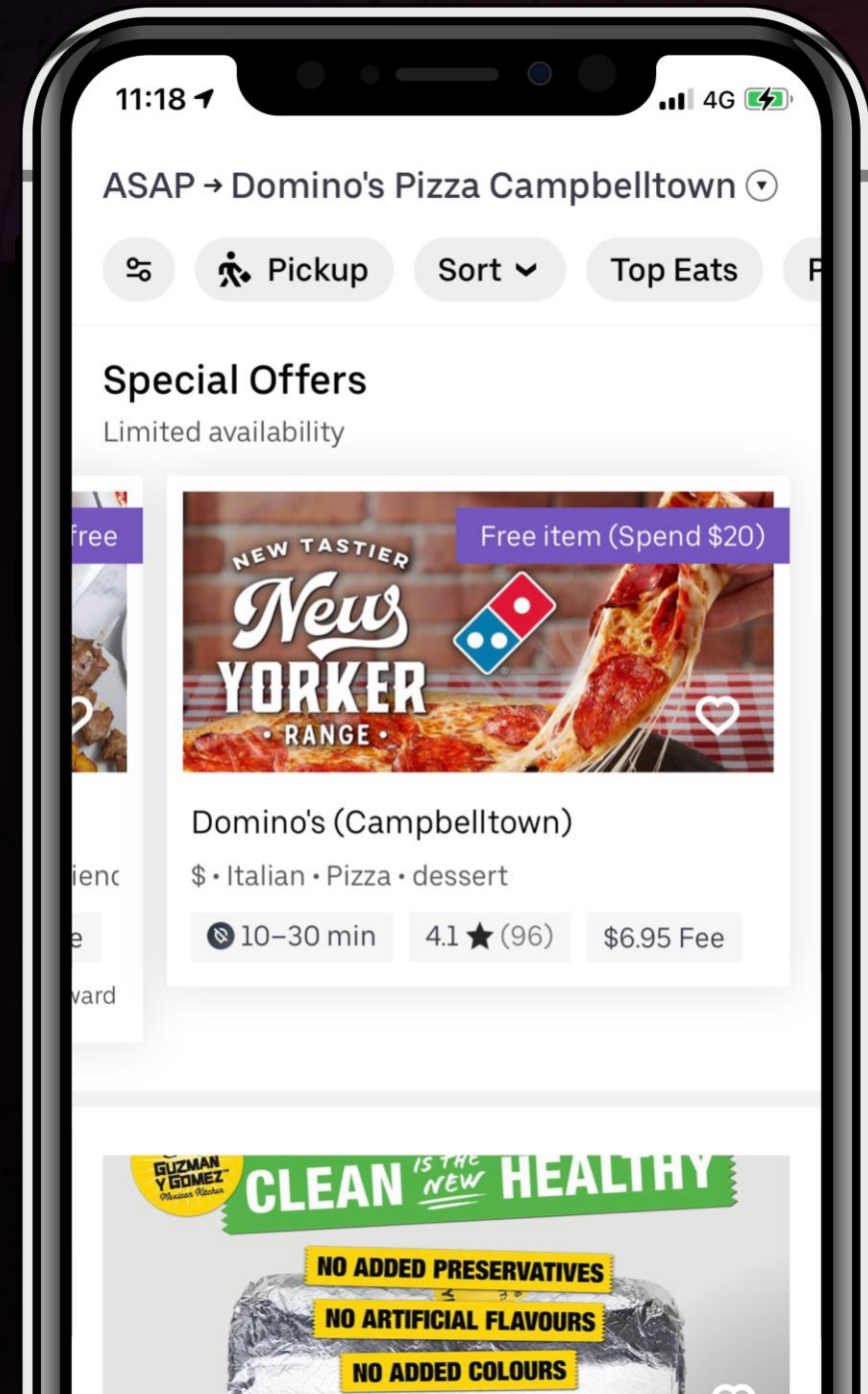


Continue our '**Play to Win**' strategy within aggregators



Maximise Visibility & Orders with Always-On Promotions for Uber Eats

Our base sales have
increased 40% since introducing
always-on promotions



Product + Service + Image

Price

=

Value

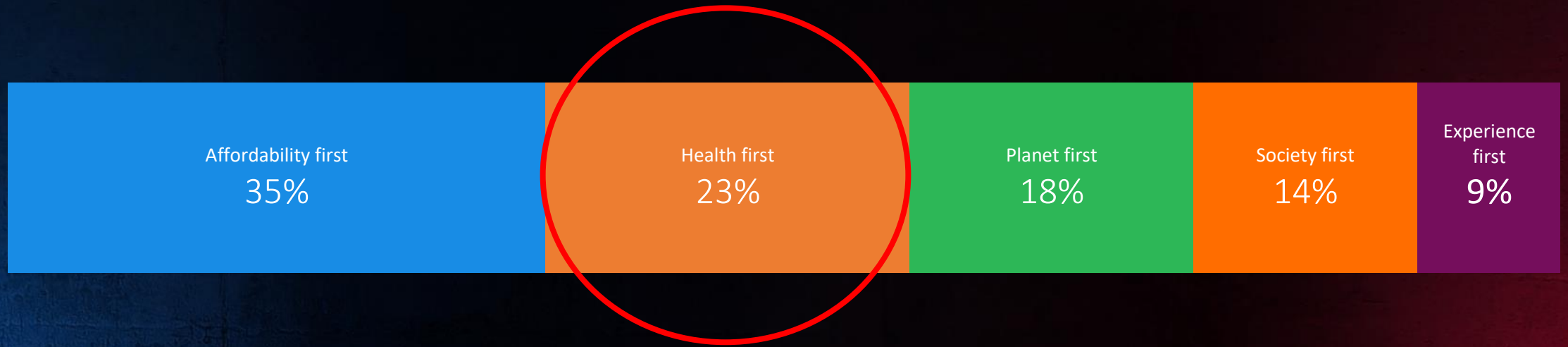


3. Product

- Dial-up freshness, taste & quality



The future consumer: **Beyond COVID-19** segmentation



Affordability first

Consumers who will focus on living within their means

Health first

Those looking after their health, and the health of their families

Planet first

Consumers who will make environmental concerns central to their lives

Society first

Those who will prioritize their social concerns

Experience first

Consumers who will focus on living in the moment



Dial up freshness, taste and quality





Product + Service + Image

Price

=

Value

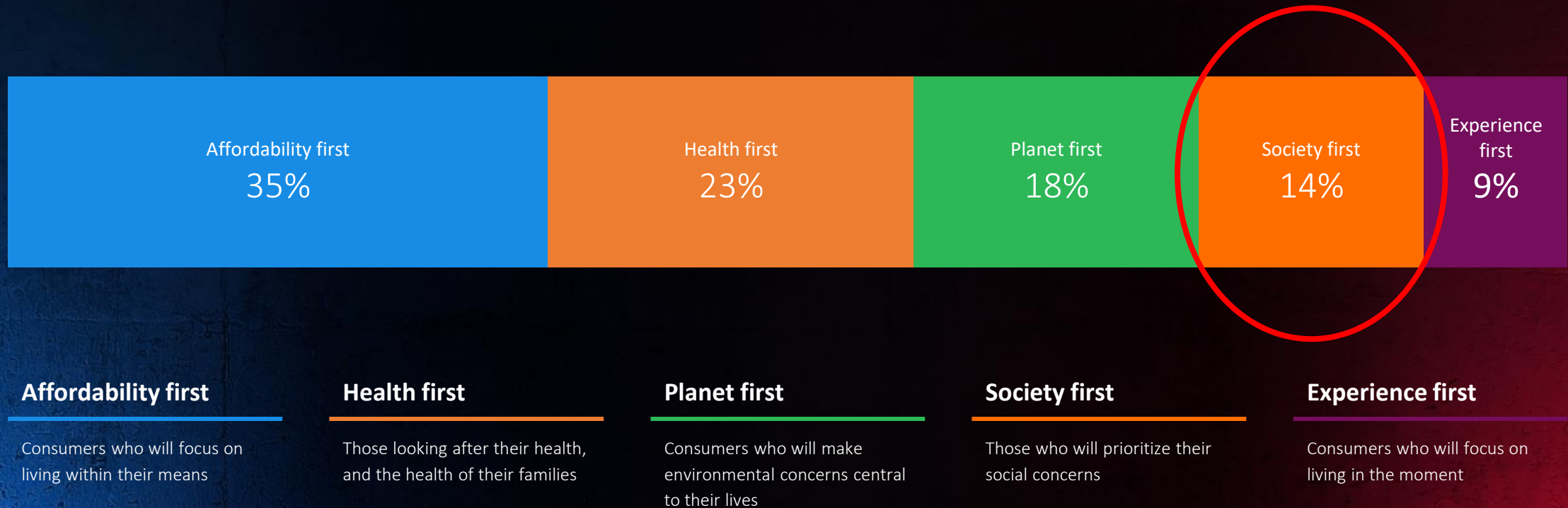


3. Image

- Brand positioning
- Feed The Knead



The future consumer: **Beyond COVID-19** segmentation



Brand Positioning





Bring it in.™



The idea that pizza brings people closer together is one that resonates with consumers

*Everybody sort of likes pizza, so I think it's a good way for everybody to come together and congregate, it's probably the main way I'd see Dominos. **Jeremy***

*I can't think of the same message being put out by other pizza places, nothing that brings anything to memory, or makes me think they care about their customers. **Suzanne***







A portrait of Nate Myles, a man with a shaved head and light stubble, wearing a maroon t-shirt. He is looking slightly off-camera with a serious expression. The background is dark and out of focus, showing hints of red and blue.

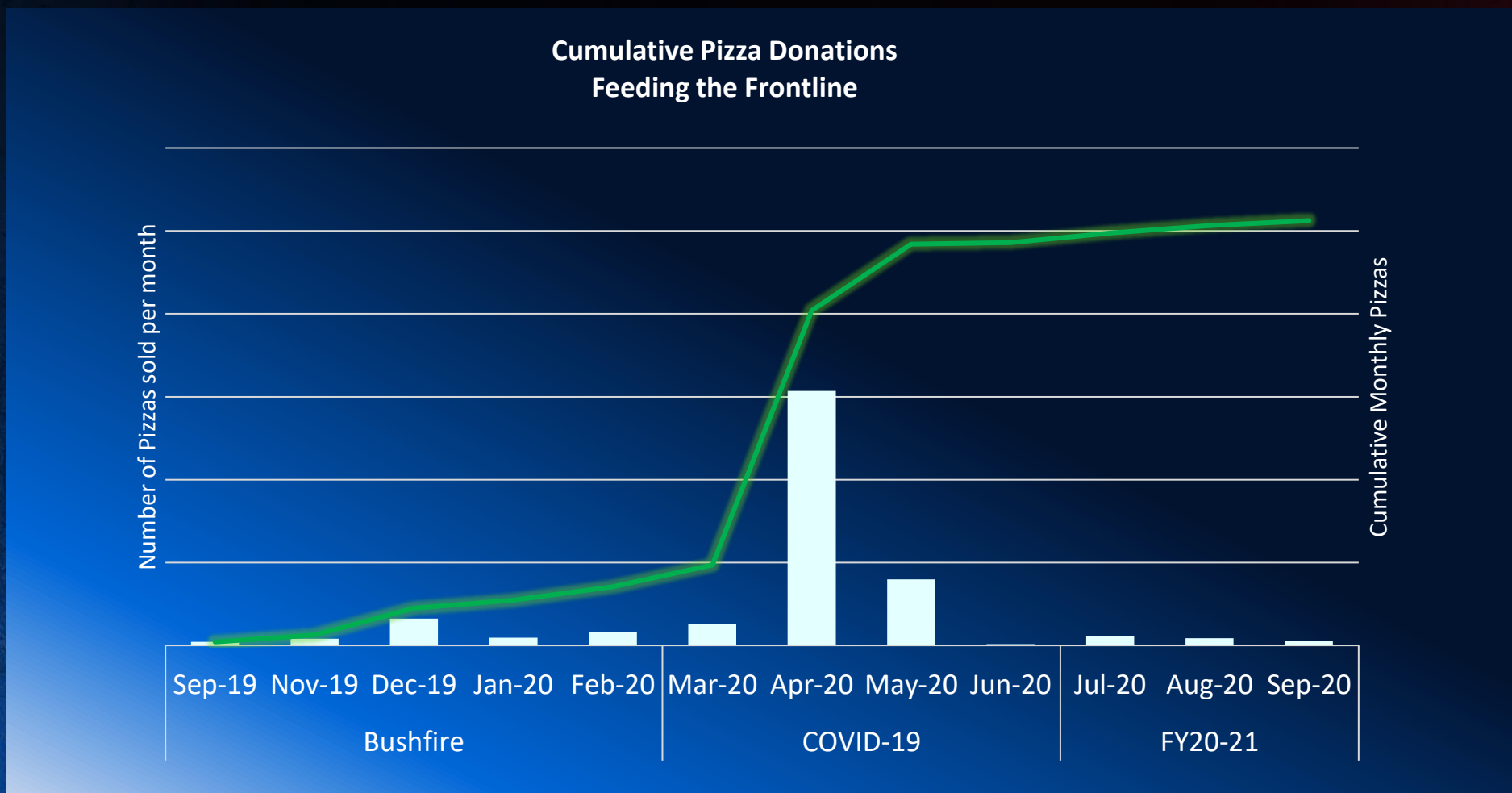
Nate Myles

QLD Footy Legend

A locally run program where stores identify the 'knead' in their local communities and provide support through free pizza.



Feeding the Frontline has donated over 25k pizzas



5. How do we measure success?

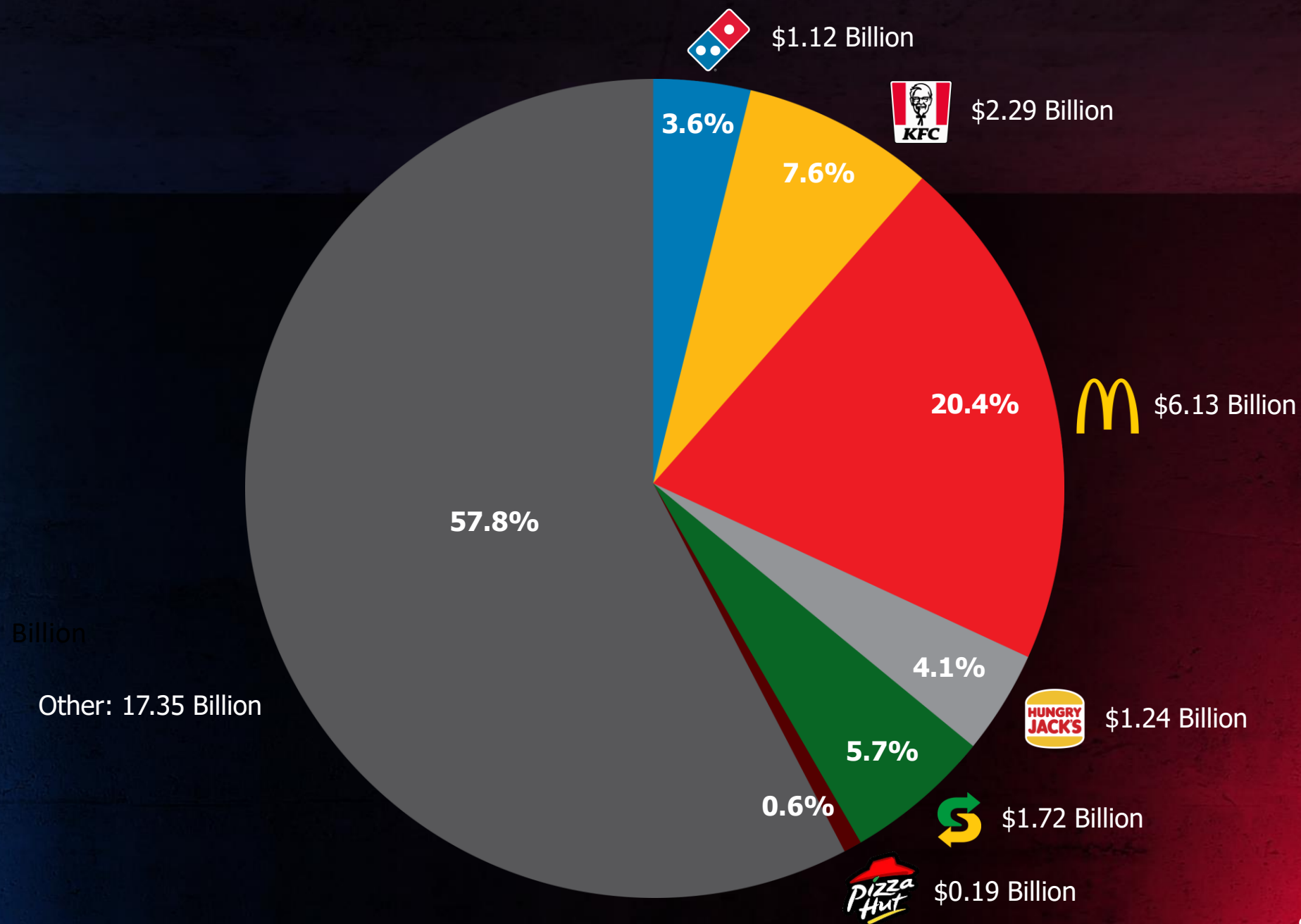


How we measure success...

1. Daily SSS & SSC targets – Campaign Objectives
2. Franchisee Profitability
4. Tracking the Opportunity Group's movement to the brand
5. Tracking Brand Sentiment for total consumer consideration movement



QSR



Source: The NPD Group/Crest AU, Year End March 2020



European customer approach

Nicky Claeys

CHIEF COMMERCIAL OFFICER, EUROPE

Agenda


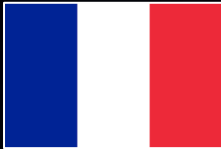




- 1 Customer Value in Europe
- 2 Brand Barriers
- 3 Non-Traditional Targeting
- 4 Value Champion
- 5 Acceleration on Delivery
- 6 Frequency & Occasion layering



1. Customer Value in Europe



1. Customer Value in Europe

						
POPULATION	84 MILLION	65 MILLION	17MILLION	11,6 MILLION	5,7 MILLION	0,6 MILLION
# DOMINO'S STORES	339	428	307	105	13	1
STORE DENSITY: STORES/ TOTAL POPULATION	1/250,700	1/155,900	1/55,900	1/119,400	1/438,000	1/600,000
KEY PIZZA COMPETITOR	CALL-A-PIZZA	PIZZA HUT	NEW YORK PIZZA	PIZZA HUT	GORM'S	PIZZA HUT
LANGUAGE	GERMAN	FRENCH	DUTCH	DUTCH+FRENCH	DANISH	LUX+FRENCH+GERMAN

Store counts as at 25 November – for updated store counts visit

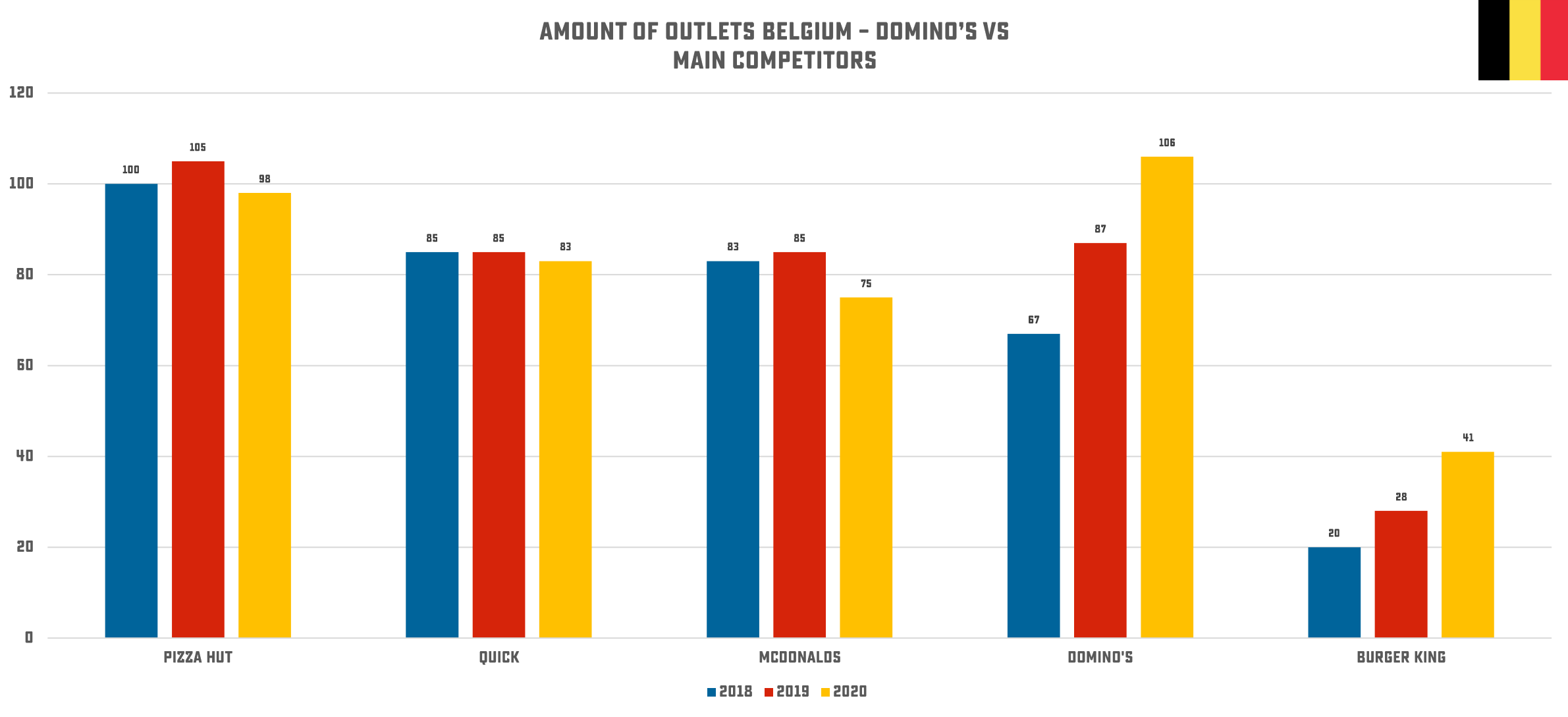
<https://investors.dominos.com.au/investors>



In Luxembourg, Domino's opened its first store



In Belgium, Domino's now has more outlets than any other QSR



Product + Service + Image

Price

=

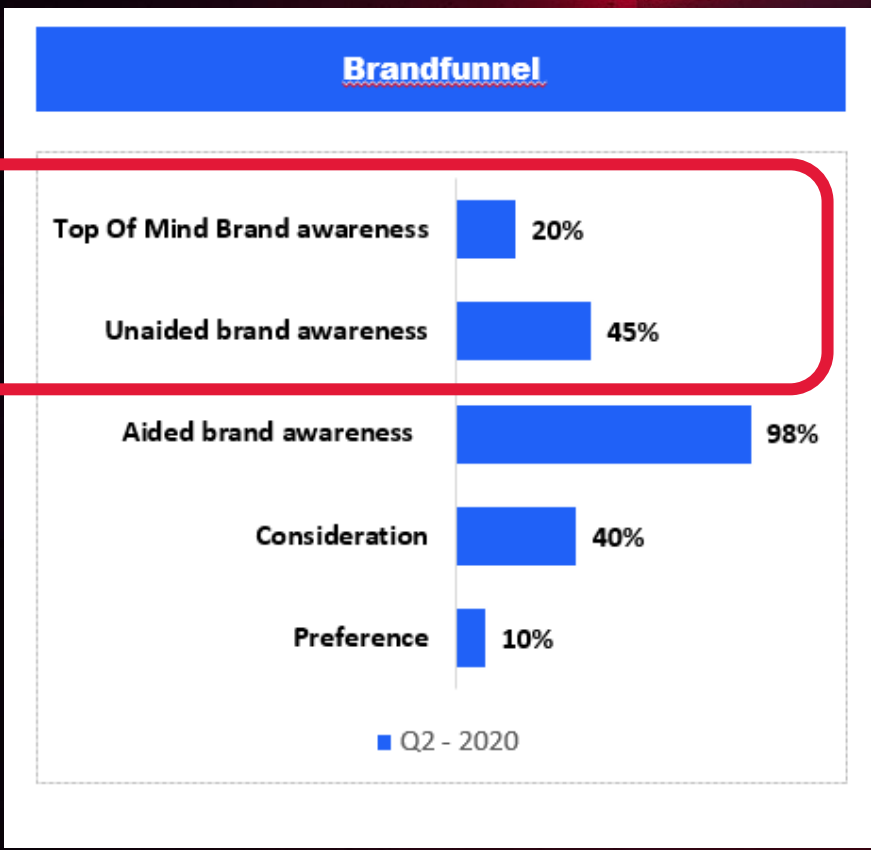
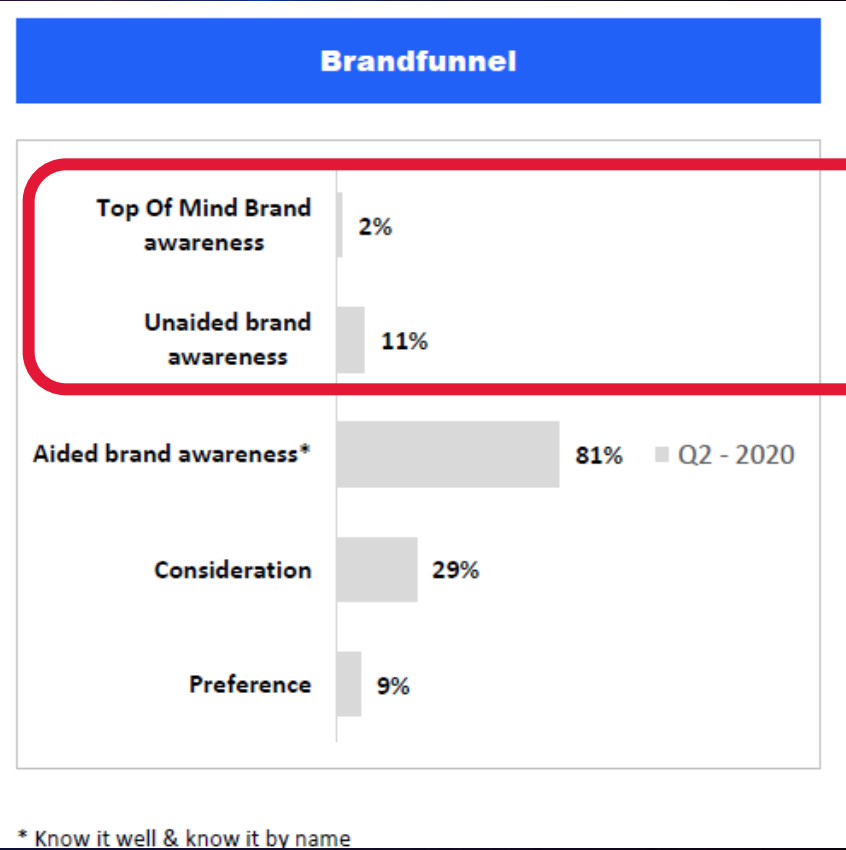
Value



2. Brand Barriers



Raising Brand Awareness is key to attract more customers in several markets



The Power of **TV Advertising**

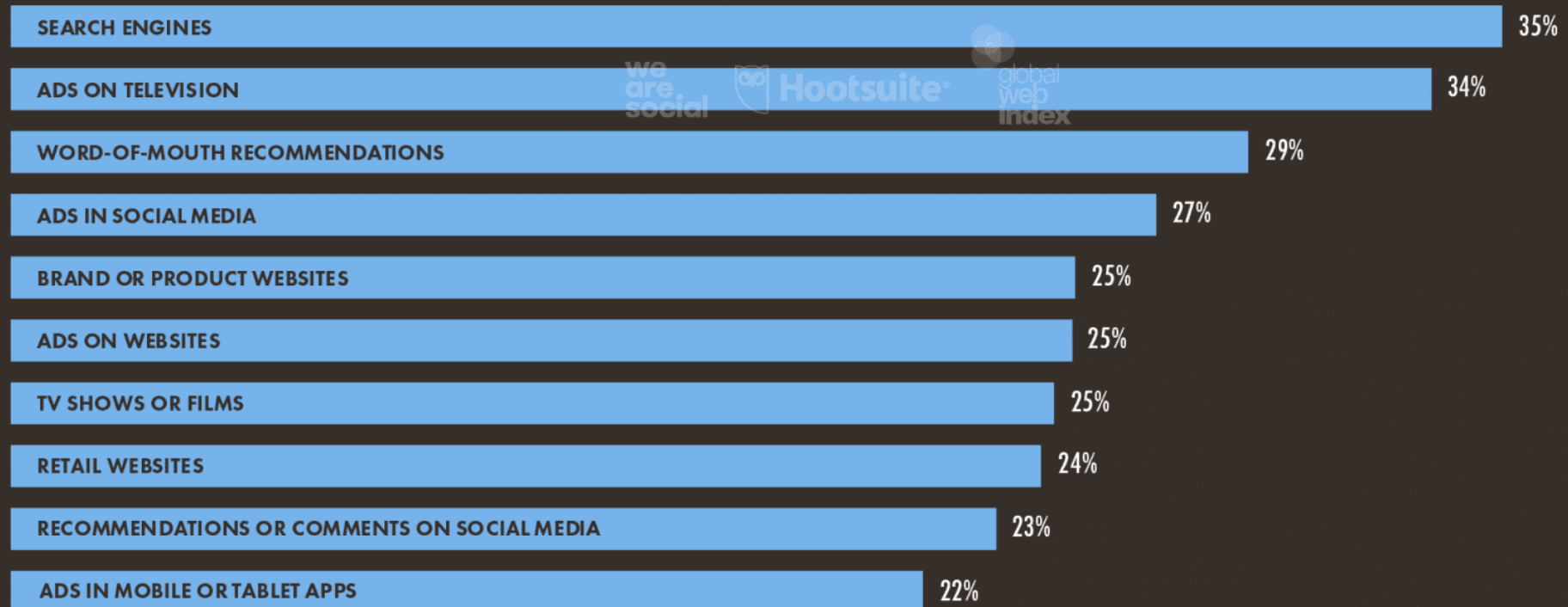


Media Consumption

JAN
2020

SOURCES OF NEW BRAND DISCOVERY

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO SAY THEY DISCOVER NEW BRANDS AND PRODUCTS THROUGH EACH MEDIUM OR ACTIVITY



227

SOURCE: GLOBALWEBINDEX (Q3 2019). FIGURES REPRESENT THE FINDINGS OF A BROAD SURVEY OF INTERNET USERS AGED 16 TO 64. SEE [GLOBALWEBINDEX.COM](https://www.globalwebindex.com) FOR MORE DETAILS.

we
are
social

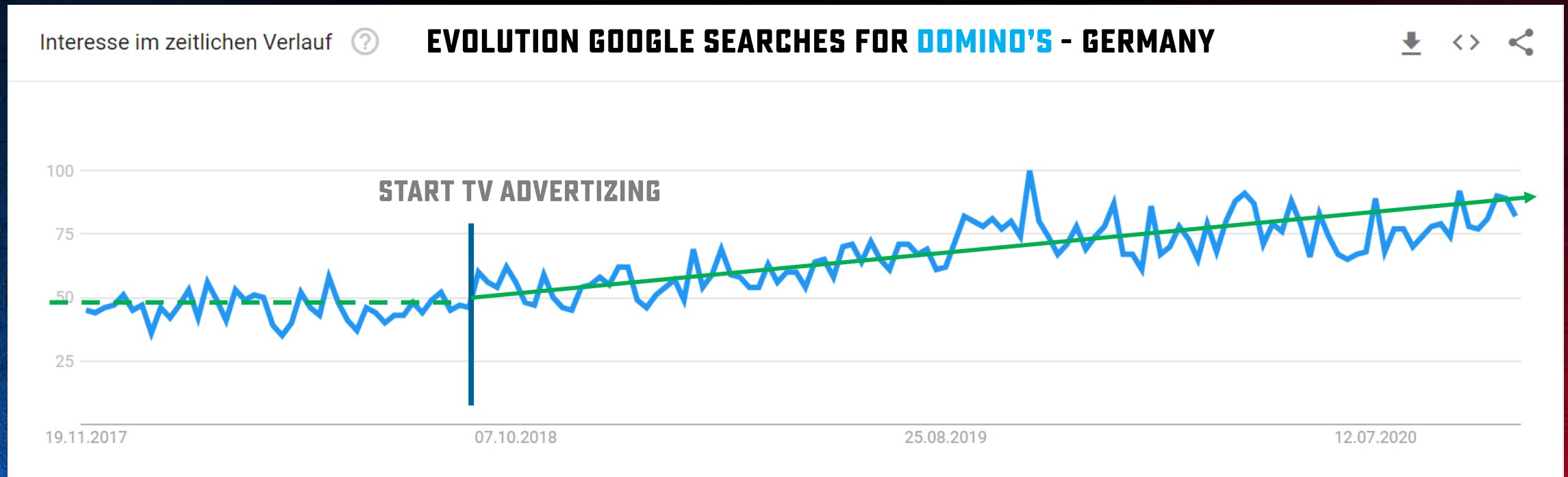
Hootsuite®



TVC Germany



Impact of TV advertising



Building Momentum – Increasing TV Media Weight with additional franchisee Adfund contribution



2020 VS 2019

X 3



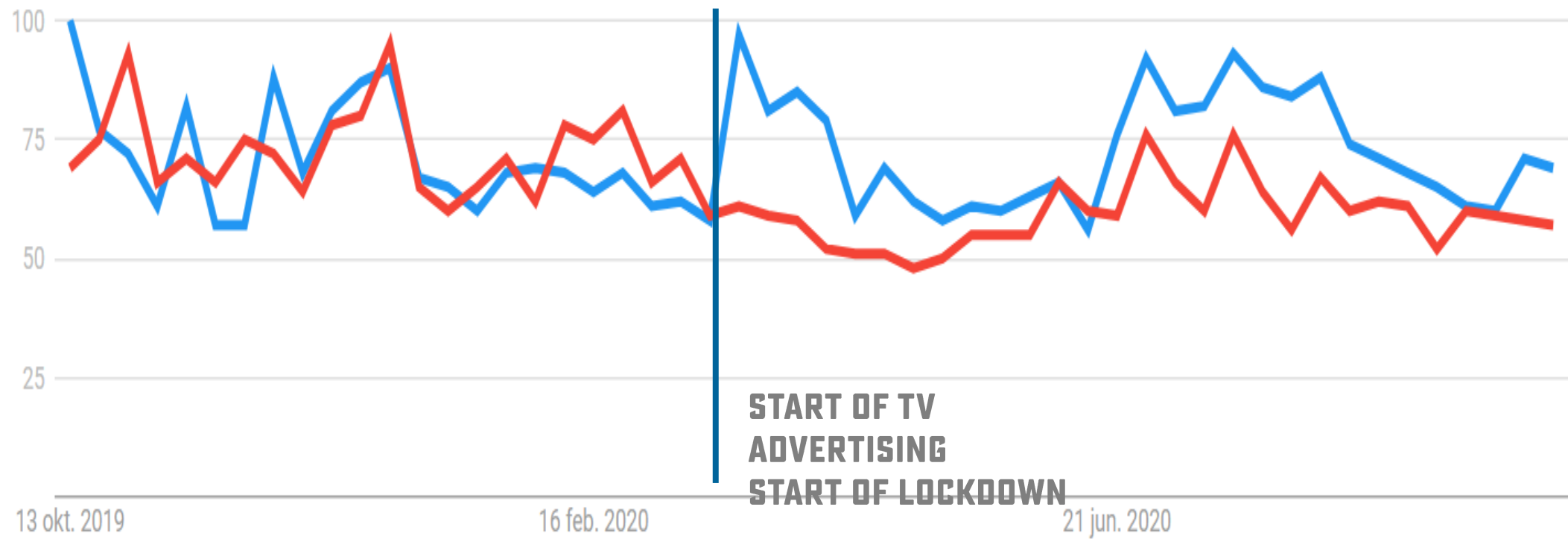
TVC Belgium



Impact of TV advertising



RELATIVE GOOGLE SEARCHES FOR DOMINO'S VS PIZZA HUT - BELGIUM



Highest proportional Domino's brand strength in NL

	Avg. monthly searches		
Country	Pizza	Brand (Domino's, Domino's Pizza)	PIE % (DP vs. pizza)
Belgium	74.000	181.000	245%
Germany	550.000	585.000	106%
Netherlands	110.000	458.500	417%
Denmark	135.000	20.200	15%
France	450.000	818.000	182%



3.

Non-Traditional Targeting



Connecting via **Social Media**



Shift towards more digital/social media activities

APR
2020

COVID-19: INCREASE IN ONLINE AND DIGITAL ACTIVITIES

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 IN SELECT COUNTRIES* WHO REPORT SPENDING MORE TIME ON EACH ACTIVITY IN RECENT WEEKS

WATCHING MORE SHOWS &
FILMS ON STREAMING SERVICES



57%

SPENDING LONGER
USING SOCIAL MEDIA



47%

SPENDING LONGER ON
MESSENGER SERVICES



46%

LISTENING TO MORE MUSIC
STREAMING SERVICES



39%

SPENDING MORE TIME
ON MOBILE APPS



36%

SPENDING MORE TIME PLAYING
COMPUTER OR VIDEO GAMES



35%

CREATING AND
UPLOADING VIDEOS



15%

LISTENING TO
MORE PODCASTS



14%

11

SOURCE: GLOBALWEBINDEX'S CORONAVIRUS MULTI-MARKET STUDY (WAVE 2, APRIL 2020). ***NOTE:** FIGURES REPRESENT THE FINDINGS OF A SURVEY OF INTERNET USERS AGED 16 TO 64 IN AUSTRALIA, BRAZIL, CANADA, CHINA, FRANCE, GERMANY, INDIA, IRELAND, ITALY, JAPAN, NEW ZEALAND, PHILIPPINES, SINGAPORE, SOUTH AFRICA, SPAIN, THE UNITED KINGDOM, AND THE UNITED STATES. DATA COLLECTION (FIELDWORK) TOOK PLACE BETWEEN MARCH 31 AND APRIL 02, 2020. SEE [GLOBALWEBINDEX.COM](https://www.globalwebindex.com) FOR MORE DETAILS.

we
are
social



Hootsuite®



Social Media Consumption

APR
2020

COVID-19: INCREASED SOCIAL MEDIA USE BY AGE GROUP

PERCENTAGE OF INTERNET USERS IN EACH AGE GROUP* WHO REPORT SPENDING MORE TIME USING SOCIAL MEDIA IN RECENT WEEKS

SPENDING MORE TIME
USING SOCIAL MEDIA:
16-24 YEAR OLDS



58%

SPENDING MORE TIME
USING SOCIAL MEDIA:
25-34 YEAR OLDS



50%

SPENDING MORE TIME
USING SOCIAL MEDIA:
35-44 YEAR OLDS



42%

SPENDING MORE TIME
USING SOCIAL MEDIA:
45-54 YEAR OLDS



34%

SPENDING MORE TIME
USING SOCIAL MEDIA:
55-64 YEAR OLDS



32%

46

SOURCE: GLOBALWEBINDEX'S CORONAVIRUS MULTI-MARKET STUDY (WAVE 2, APRIL 2020). ***NOTE:** FIGURES REPRESENT THE FINDINGS OF A SURVEY OF INTERNET USERS AGED 16 TO 64 IN AUSTRALIA, BRAZIL, CANADA, CHINA, FRANCE, GERMANY, INDIA, IRELAND, ITALY, JAPAN, NEW ZEALAND, PHILIPPINES, SINGAPORE, SOUTH AFRICA, SPAIN, THE UNITED KINGDOM, AND THE UNITED STATES. DATA COLLECTION (FIELDWORK) TOOK PLACE BETWEEN MARCH 31 AND APRIL 02, 2020. SEE [GLOBALWEBINDEX.COM](https://www.globalwebindex.com) FOR MORE DETAILS.

we
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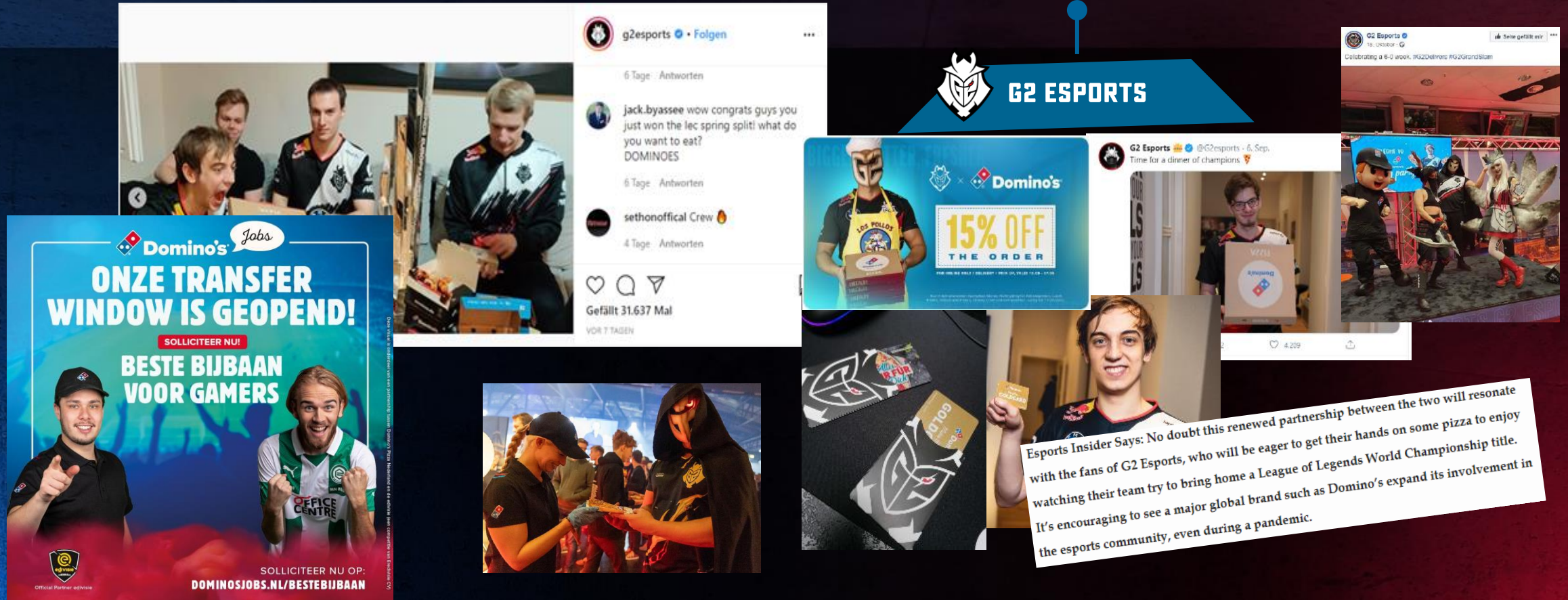
 **Hootsuite®**



Fish where the fish are - Trending on TikTok



eSports Partnerships



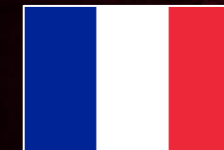
Domino's eDivisie



Domino's & G2



Domino's & League of Legend



Leading to attractive employer branding & new recruits

Ranking	Vorig jaar (2019)	Favoriete werkgever onder scholieren en studenten
1	1	Albert Heijn
2	2	Jumbo Supermarkten
3	41	PostNL
4	12	Politie
5	4	Kruidvat
6	6	PLUS
7	10	Dirk van den Broek
8	71	Domino's Pizza
9	17	Lidl
10	7	HEMA

Bron: Intelligence Group, AGO (Q3-2019 t/m Q2-2020)

**FASTEST CLIMBER IN
FAVORITE JOB AMONG
STUDENTS**

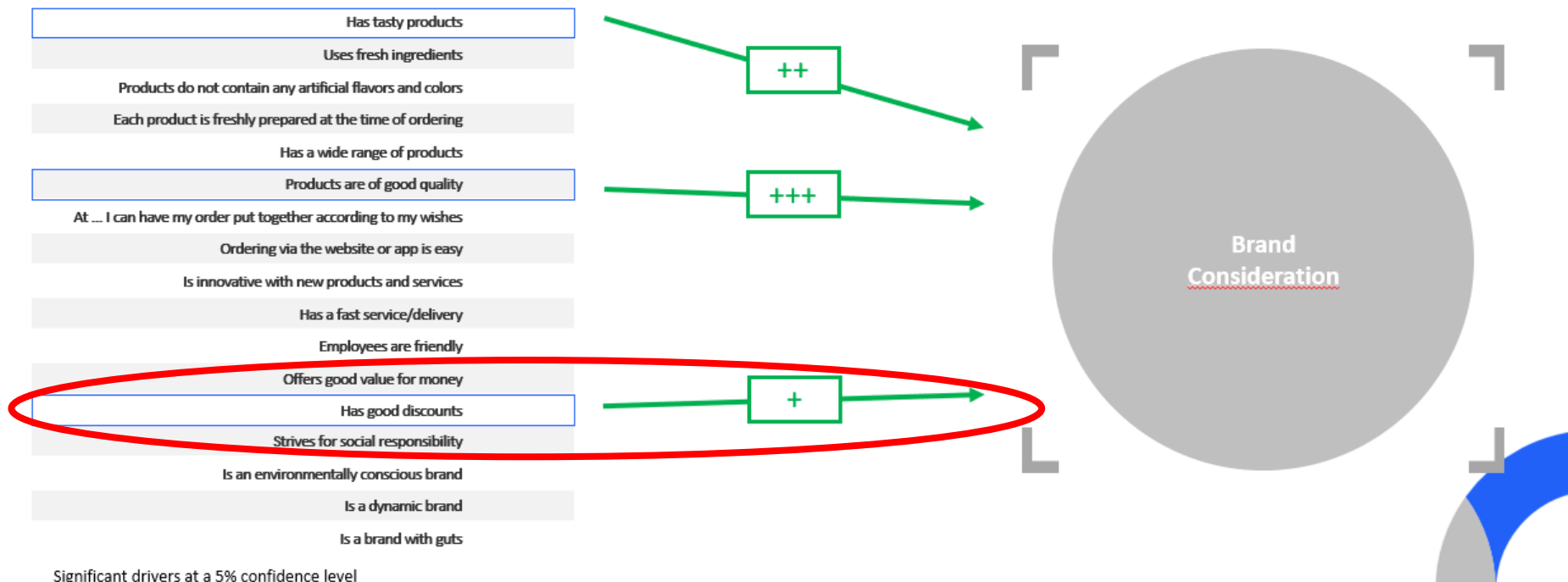
4. Value Champion



Attractive Deals -Core driver for consideration

IMAGE DOMINOS

The main drivers for considering to order at Domino's are the discounts offered, the taste of its products, and the quality of the products.



Core Value Deal – Pick Up



EVERY DAY DEAL

ALLE TRADITIONELLE PIZZAER

40 KR/STK MEDIUM SIZE

LEVERING: MINIMUM 2 TRADITIONELLE PIZZAER

Bestil på dominos.dk

Pizza varieties shown: MARGHERITA, CAPRI, TROPICAL, HAWAIIAN, PEPPERONI



ELKE DAG DEZE DEAL

5.00 MEDIUM PER STUK

Pizza varieties shown: MARGARITHA, PERFECT PEPPERONI, BACON & ONION, FORESTIERE, FUNGHI



Daily DEAL 3.99 IN GROßE CLASSIC

FÜR ABHOLER

UNSERE DOMINO'S CLASSICS IMMER GÜNSTIG!

MUR ONLINE



Domino's Pizza

Pizza Regular 4.95

& MARDI & SAMEDI Fous

à emporter



MARDIS Fous! 7.99 À L'ÉCHASSE

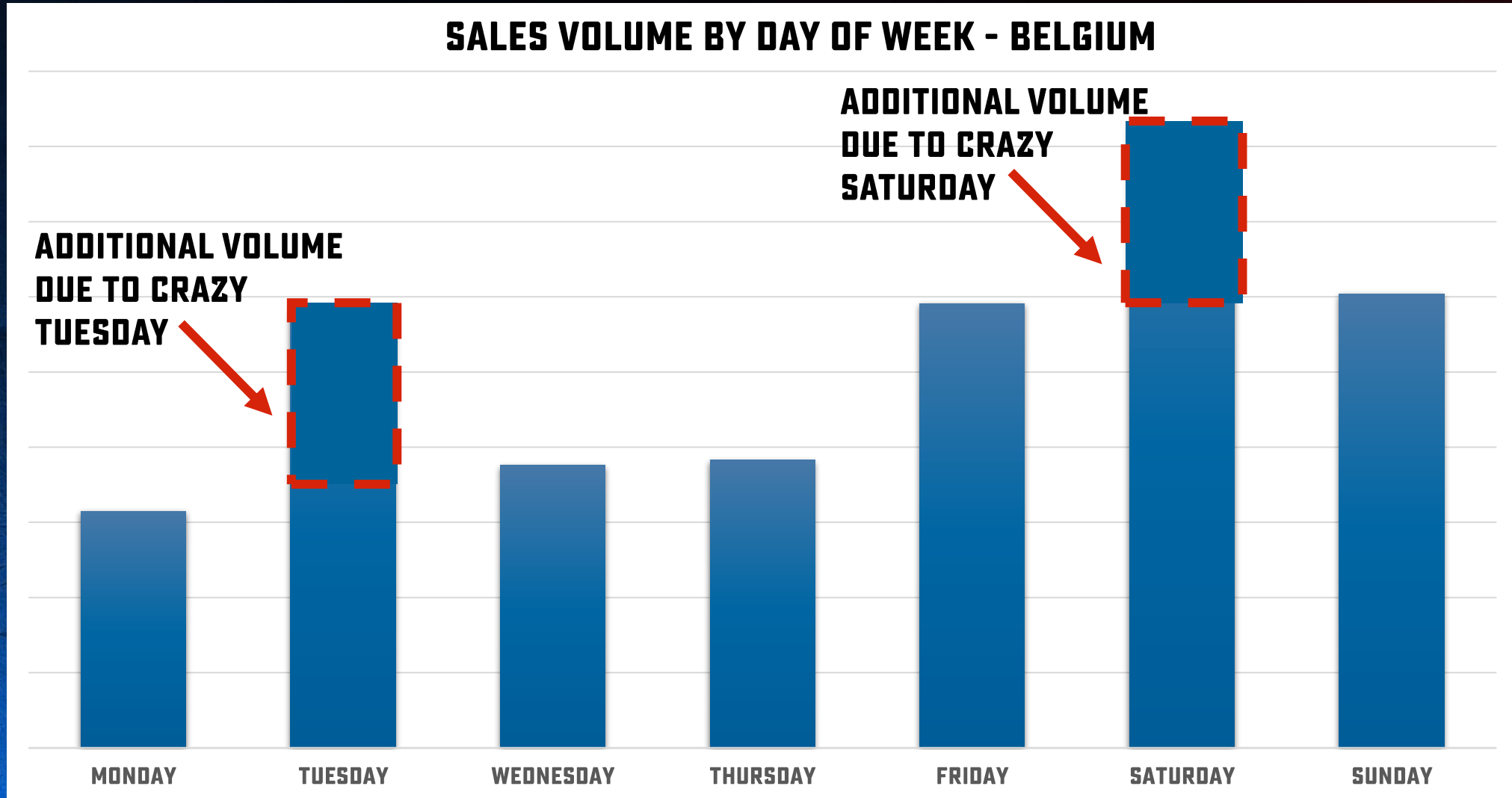
TOUTES LES PIZZAS TOUTES LES TAILLES

la boutique dominos.fr

Pour votre santé, pratiquez une activité physique régulière. www.minsport.be



Consistency pays off in customer counts & sales

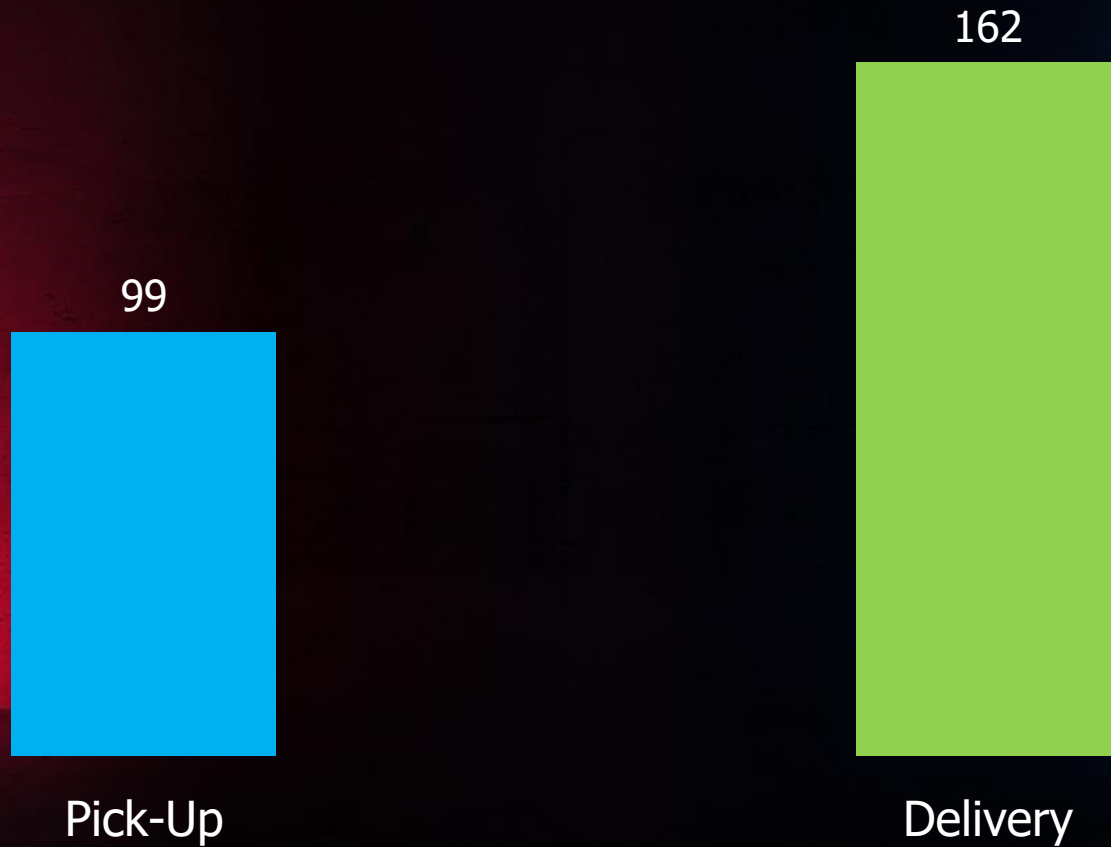


5. Delivery Acceleration



Covid-accelerated shift to delivery

Occasions Evolution NL - (Index Q2 2020 vs. 2019)

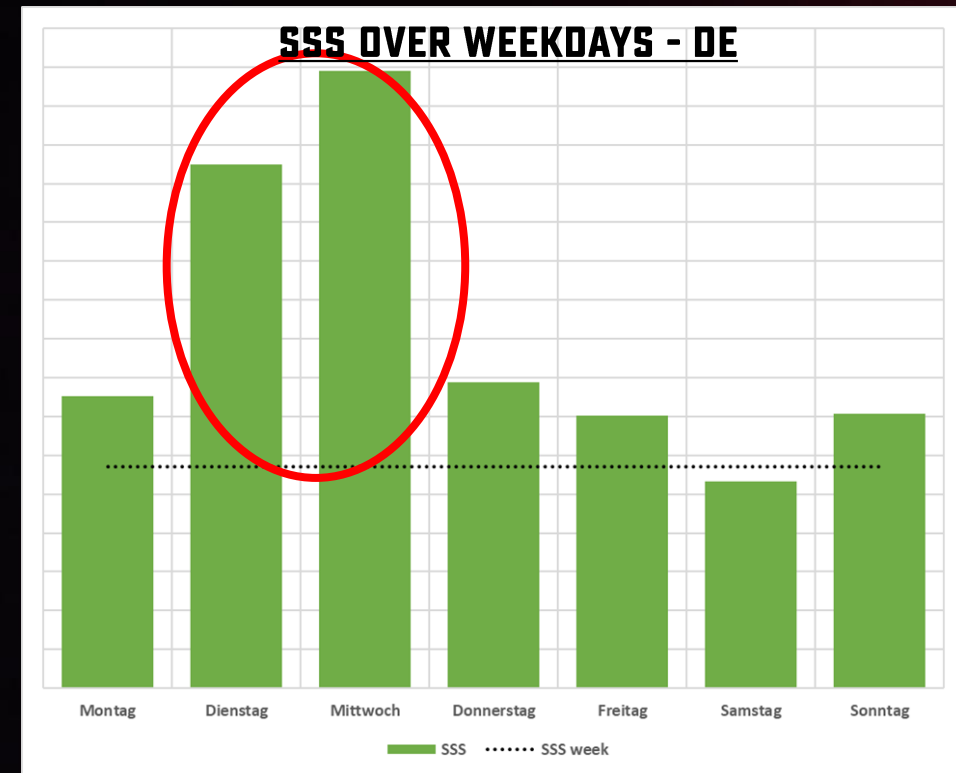
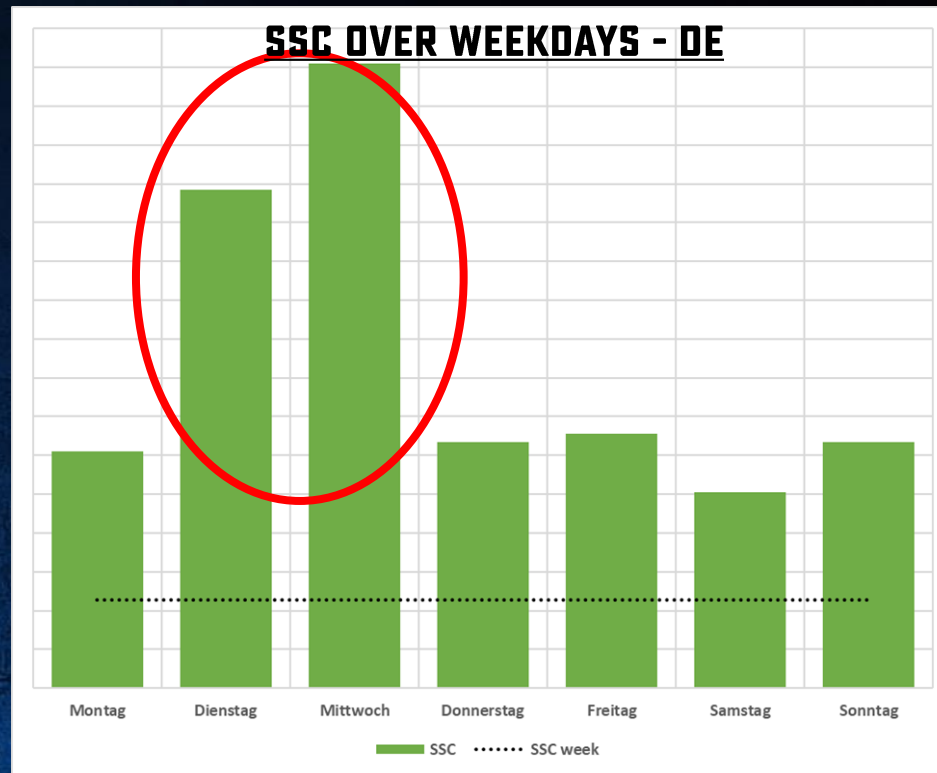


Introduction Ongoing Delivery Value Deals





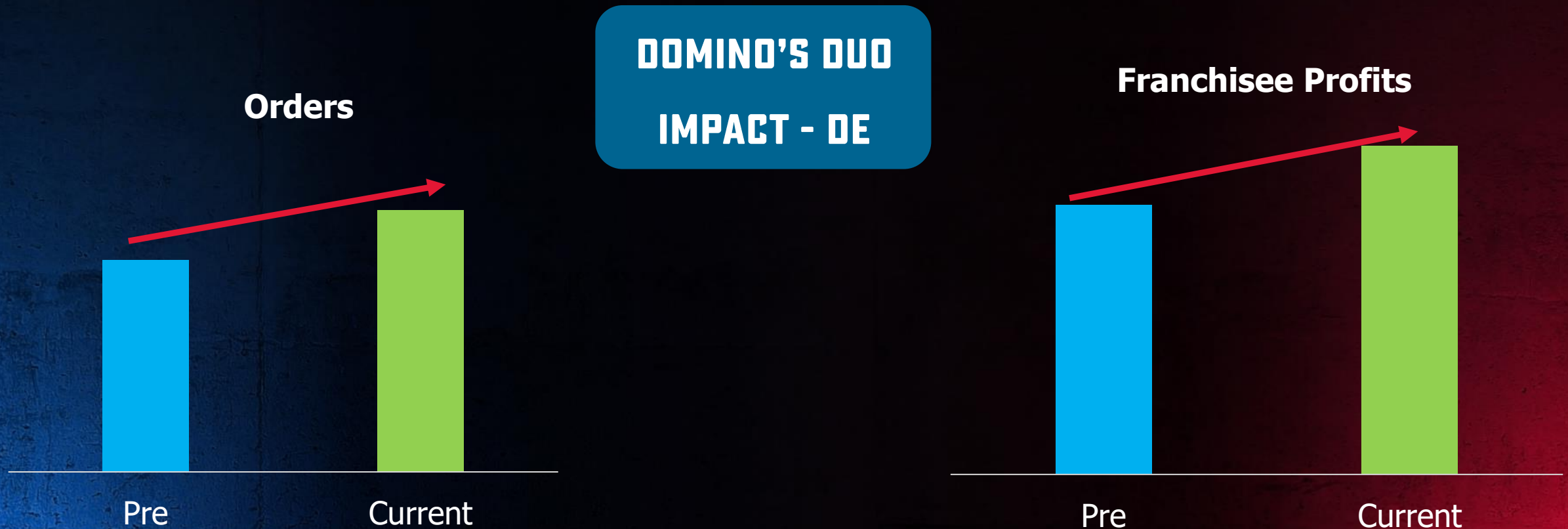
Strong Deal impact



TUESDAYS & WEDNESDAYS HAVE CONSISTENTLY REACHED HIGHER SSS - DUE TO THE TELEVISED DOMINO'S DUO DEAL



Strong Deal Impact – Translates into store profits



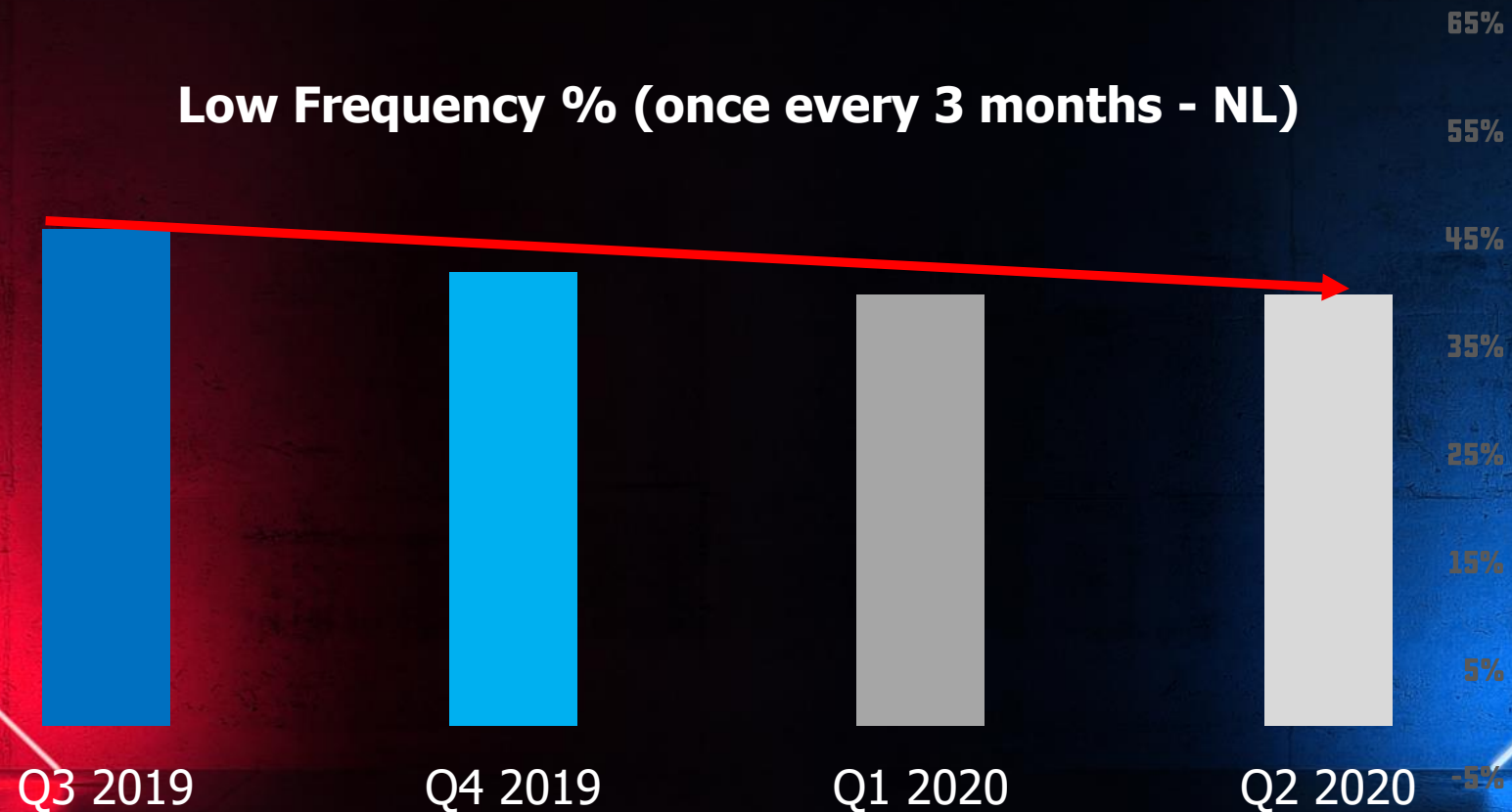
WEEKLY ORDER AND STORE PROFIT GROWTH SINCE START DOMINO'S DUO - DE



5. Layering



Opportunity to increase frequency further



Layering Across Dayparts



Layering Across Dayparts



Layering Across Dayparts



Layering Across Dayparts



Layering for frequency – Loyalty Program



AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK





Incremental frequency achieved





Accelerating Japan Growth

Todd Reilly
CMO, JAPAN

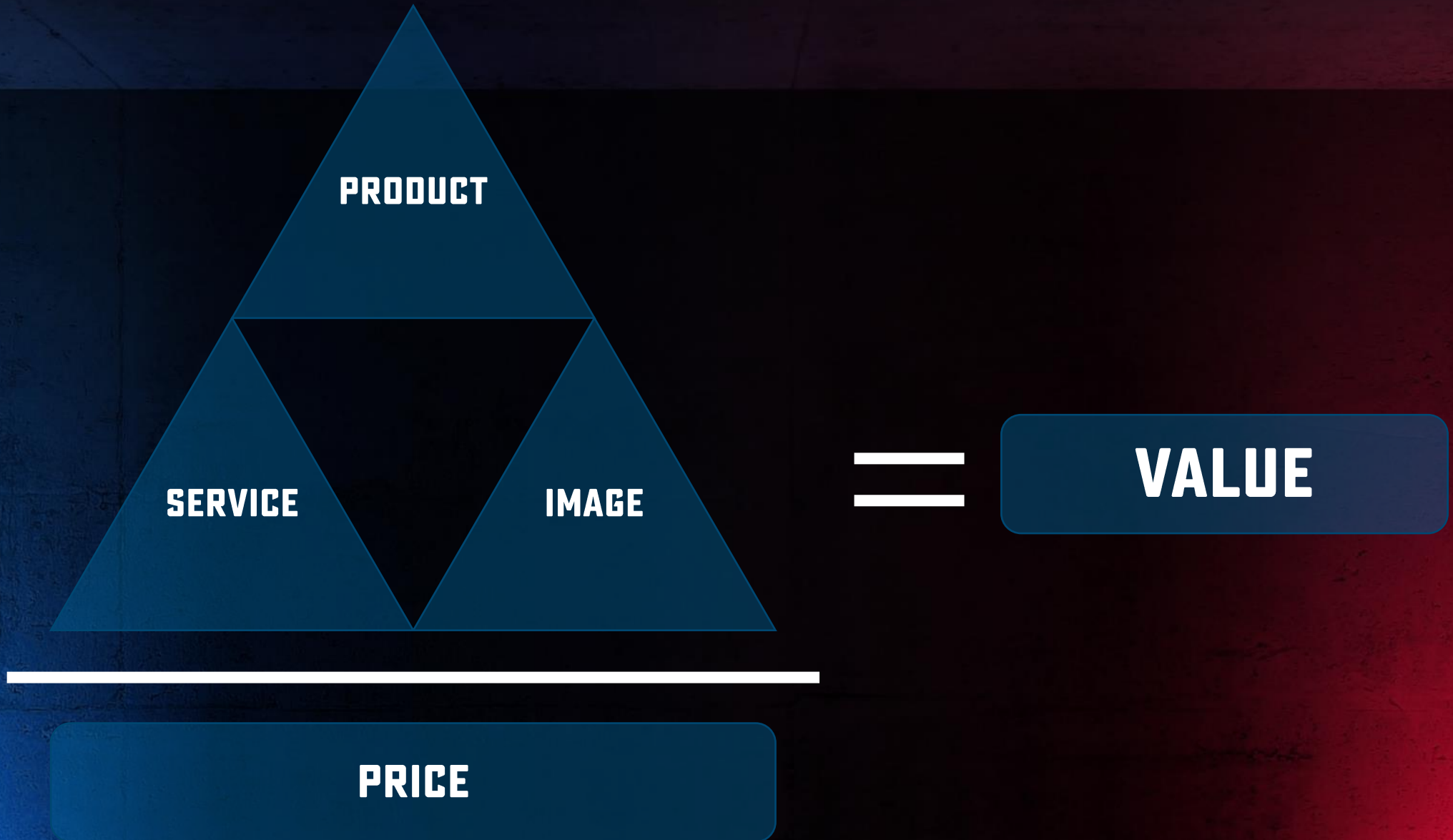
HUNGRY TO  BE BETTER

1000 stores
&
1000 weekly orders

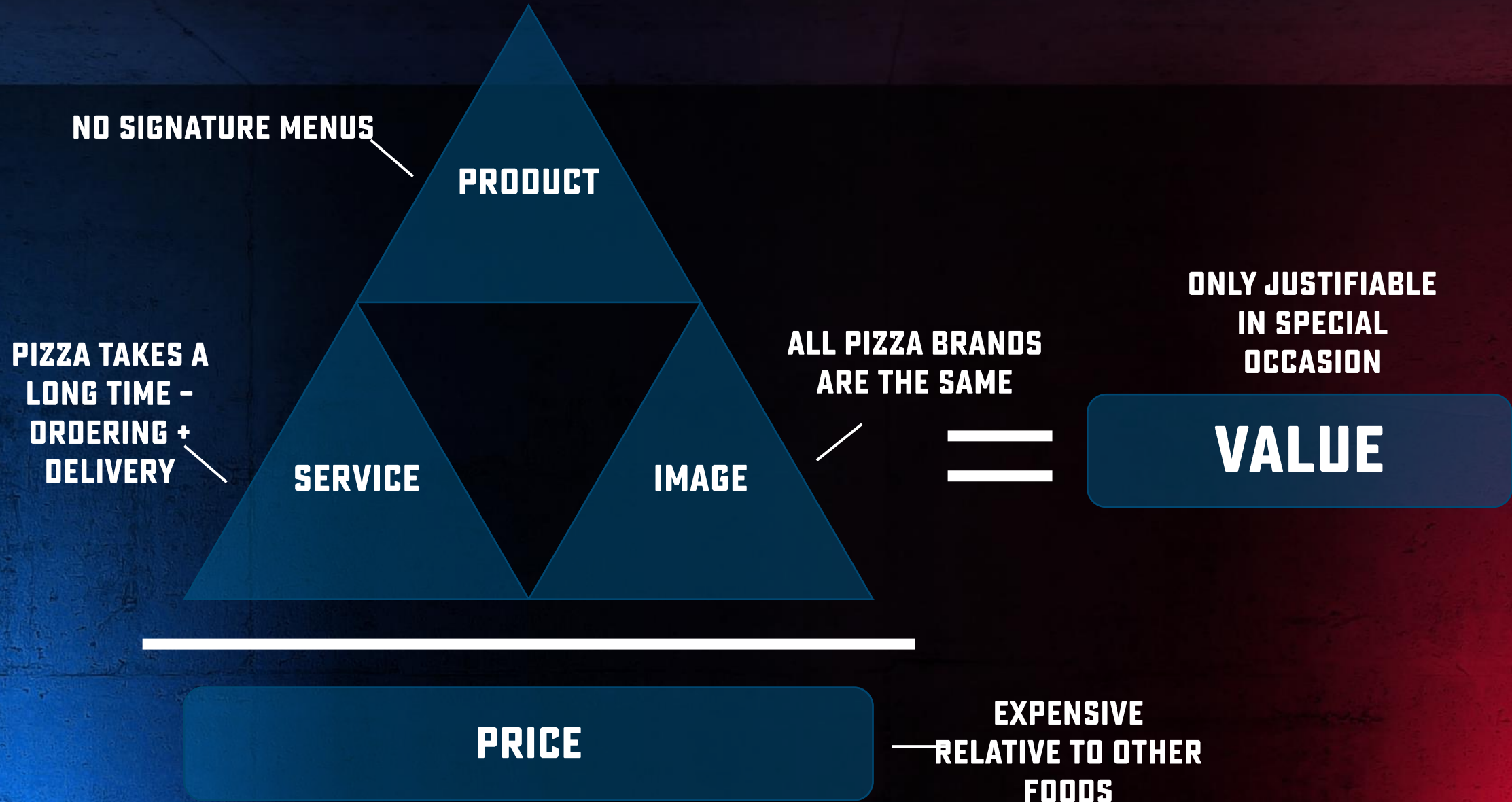
Achieve



Domino's Value Model Is Universal



Domino's Japan – Historical Brand Perception





SPECIAL OCCASION

MAINTAIN THIS



FAMILY DINNER



SINGLE EATER

GET MORE OF THIS

Occasion Growth Strategy



SPECIAL OCCASION



FAMILY DINNER



SINGLE EATER

What Is Stopping Us?





SPECIAL OCCASION

**MAINTAIN PREMIUM
IMAGE**



FAMILY DINNER

**TIME
EXPENSIVE PRICE**



SINGLE EATER

**TIME
EXPENSIVE PRICE
PORTION SIZE**





SPECIAL OCCASION



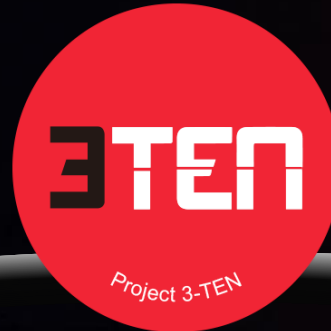
FAMILY DINNER



SINGLE EATER



Barbell Strategy – Balanced Execution



Barbell Strategy



Remove barriers to new occasions

Maintain special occasion positioning



Hungry for carefully selected ingredients.

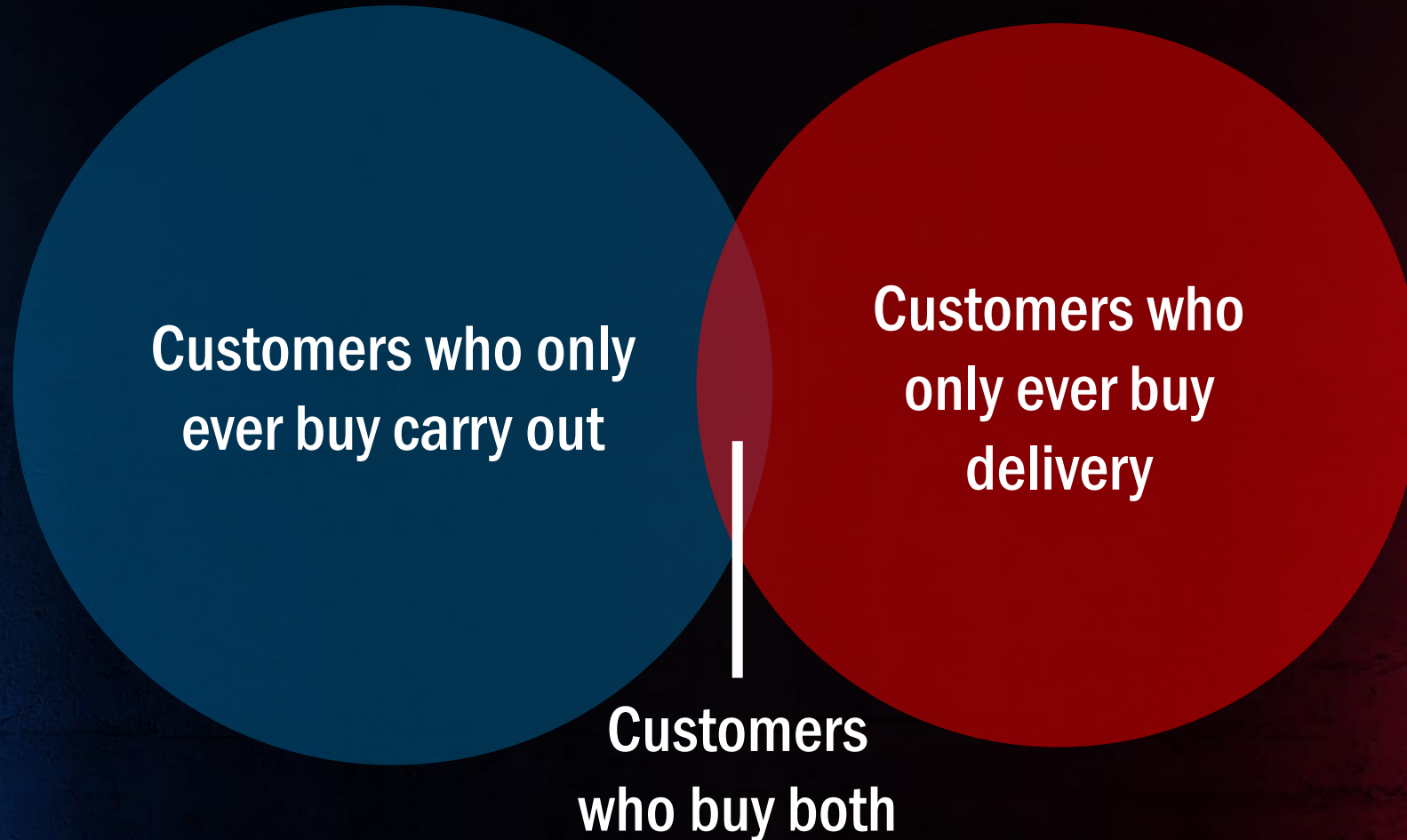


Domino's®

This is the pizza revolution at Domino's!!



WE HAVE 2 DIFFERENT CUSTOMERS



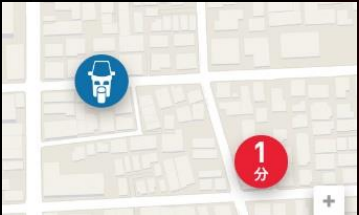
Growing Customer Occasions Through Service Ecosystem



OUR GOAL : 1000 stores, 1000 orders

3TEN

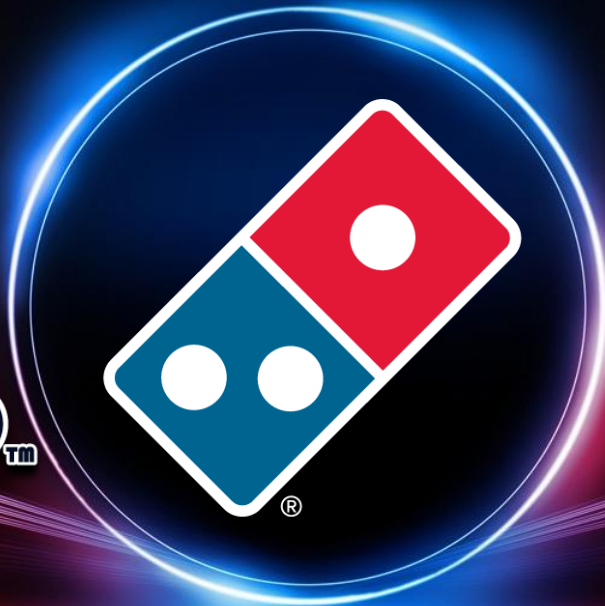
FOS



GPS
DRIVER
TRACKER

Drop&Go™

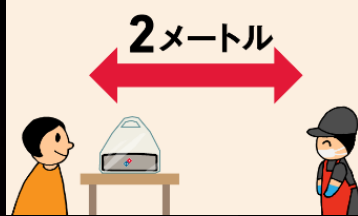
ANSHIN
DELIVERY



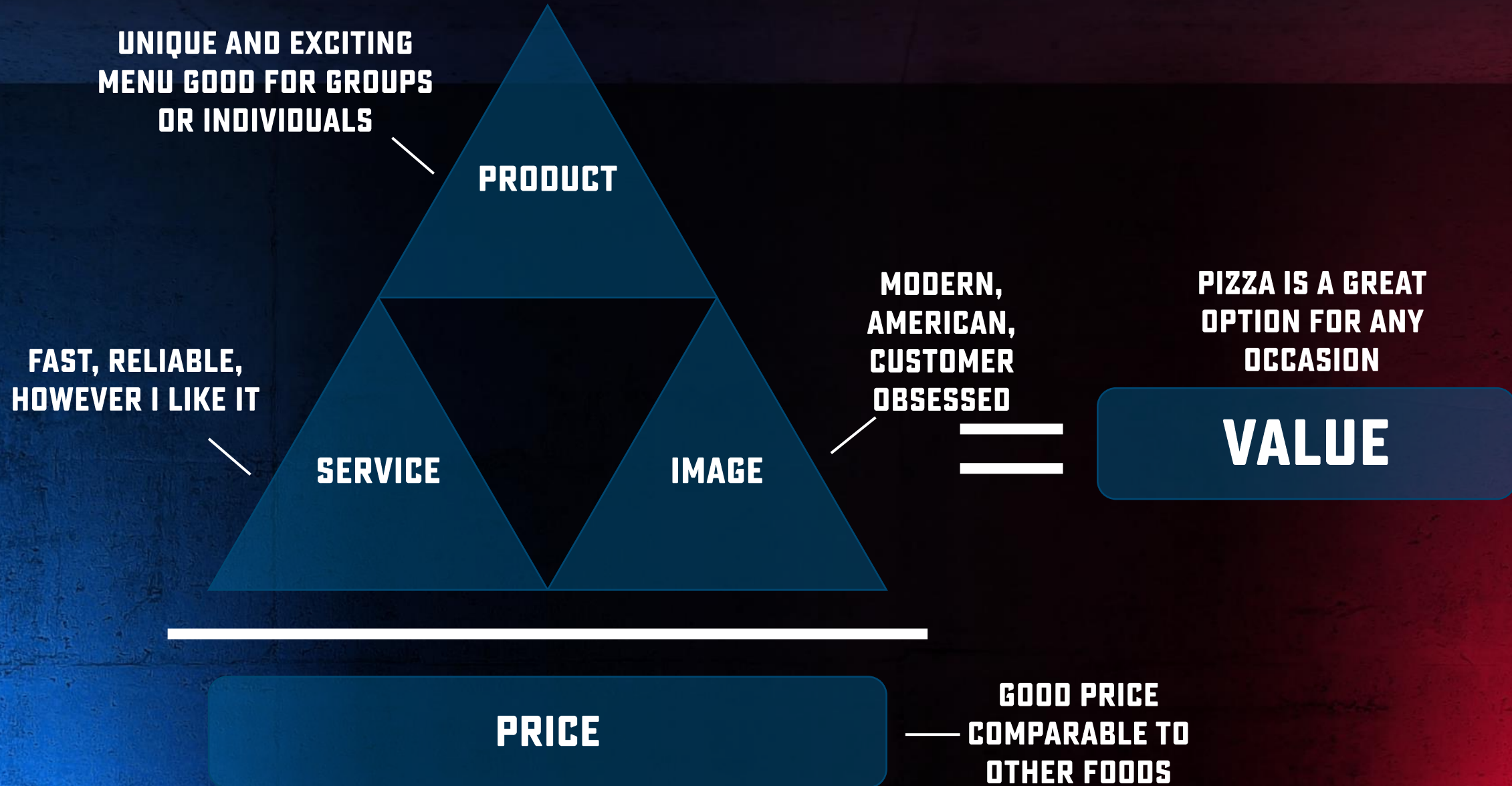
SMART DRIVE
THROUGH

JUST TIME
COOKING

ANSHIN
CARRY OUT



Domino's Japan – Target Brand Perception





Domino's development chefs



Technology Update

Michael Gillespie

GROUP CHIEF DIGITAL AND TECHNOLOGY OFFICER

DOMINO'S USES TECHNOLOGY TO ENHANCE BUSINESS OPERATIONS & CUSTOMER EXPERIENCE





SYSTEMISING

SOLUTIONS FOR GLOBAL SCALE



PREDICTIVE ORDERING

LIVE IN ALL MARKETS EXCL. LU, DK



CALL ON ARRIVAL

LIVE IN AU, NZ, JP, NL, BE



DYNAMIC DIGITAL REPORTING

LIVE IN ALL MARKETS EXCL. DK, LU



PIZZA CHECKER (DIGITAL QUALITY CHECKING)

LIVE IN AU, NZ



INVENTORY APP

IN DEVELOPMENT FOR ALL MARKETS



CAR PARK DELIVERY

LIVE IN AU, NZ, JP, NL. AVAILABLE IN FR, DE, BE



LATE DELIVERY EMAILS

LIVE IN ALL MARKETS EXCL. JP, LU, DK



PREDICTIVE ROSTERING

LIVE IN AU, NZ



ENHANCED

ONLINE ORDERING FLOW

PREDICTIVE ORDERING



SERVICE SELECTION



PRODUCT MENU



CHECKOUT



PAYMENT





PREDICTIVE ROSTERING



**APPROPRIATE STAFF NUMBERS
TO SUPPORT SALES**





TRACKER NOTIFICATION
ORDER OUT FOR DELIVERY



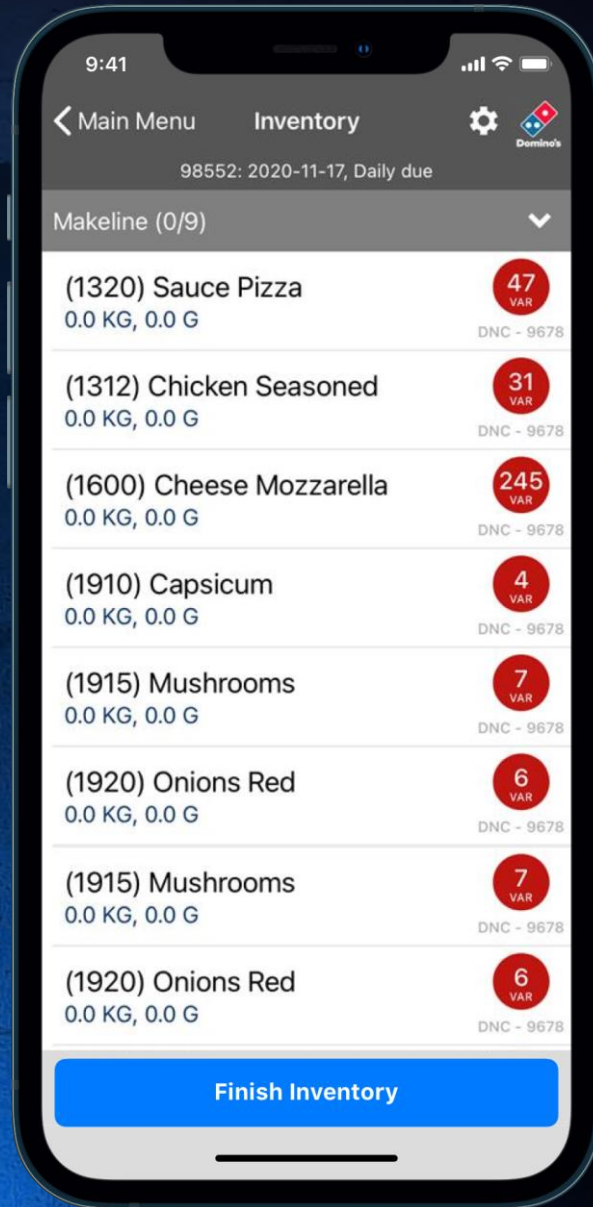
DELIVERY EXPERT
ON EBIKE



GPS DRIVER TRACKER



CALL ON ARRIVAL
MEET US AT THE DOOR

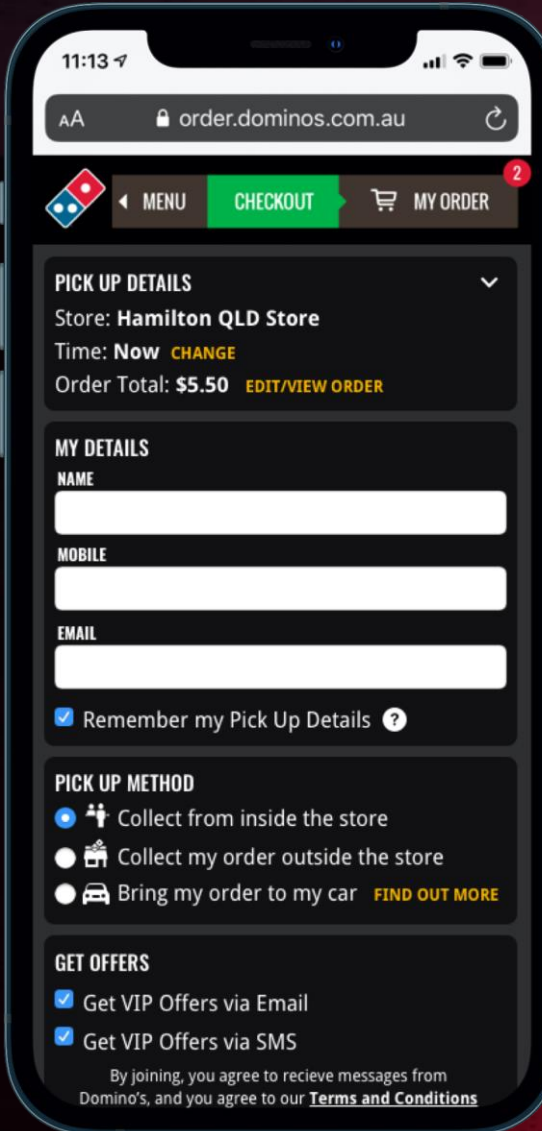


INVENTORY APP 2






Domino's® ZERO CONTACT PICK UP



11:13 11:13 11:13

AA order.dominos.com.au

 MENU CHECKOUT MY ORDER 2

PICK UP DETAILS ▾

Store: **Hamilton QLD Store**

Time: **Now** [CHANGE](#)

Order Total: **\$5.50** [EDIT/VIEW ORDER](#)

MY DETAILS


NAME


MOBILE


EMAIL

☒ Remember my Pick Up Details [?](#)

PICK UP METHOD

☒  Collect from inside the store

☐  Collect my order outside the store

☐  Bring my order to my car [FIND OUT MORE](#)

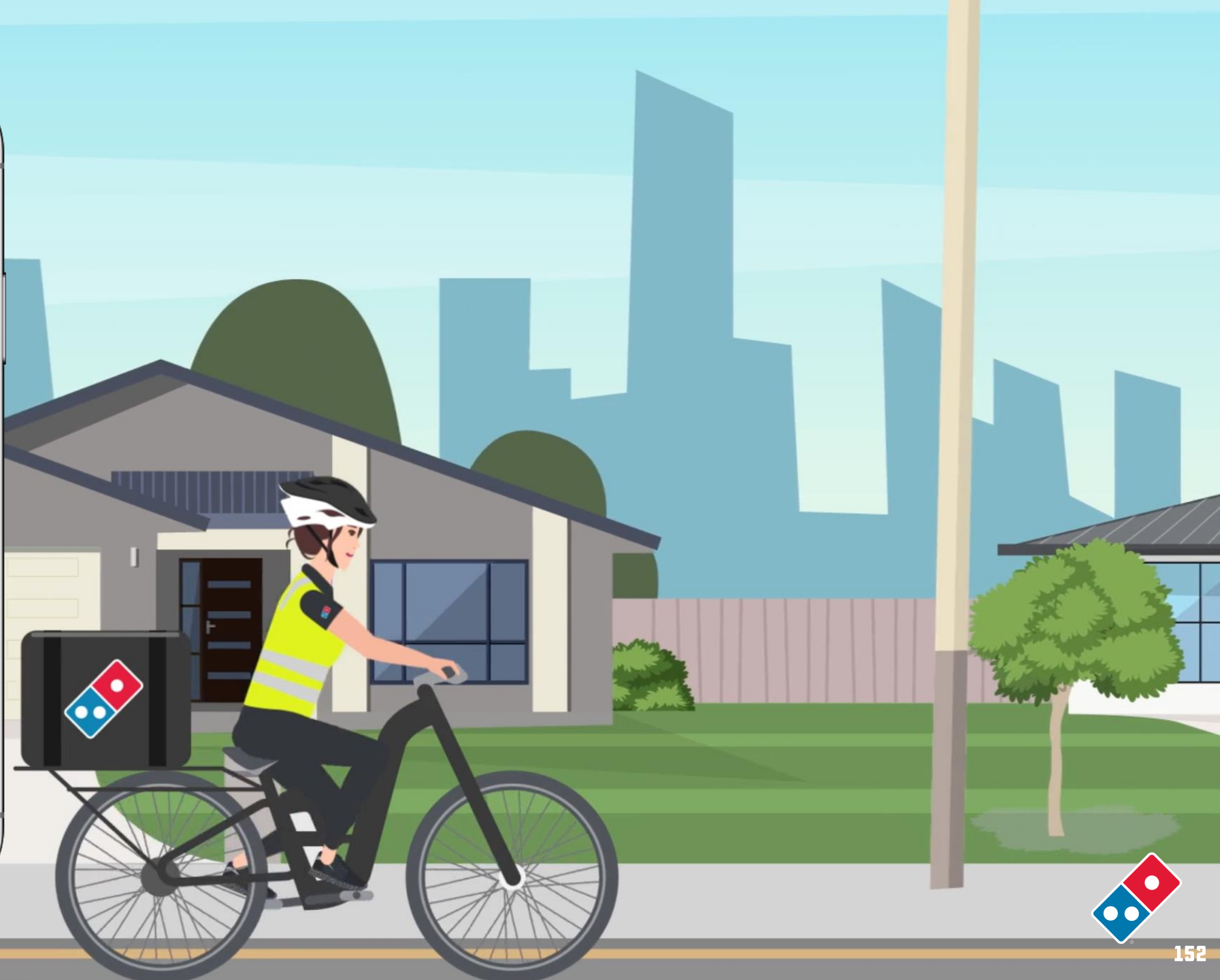
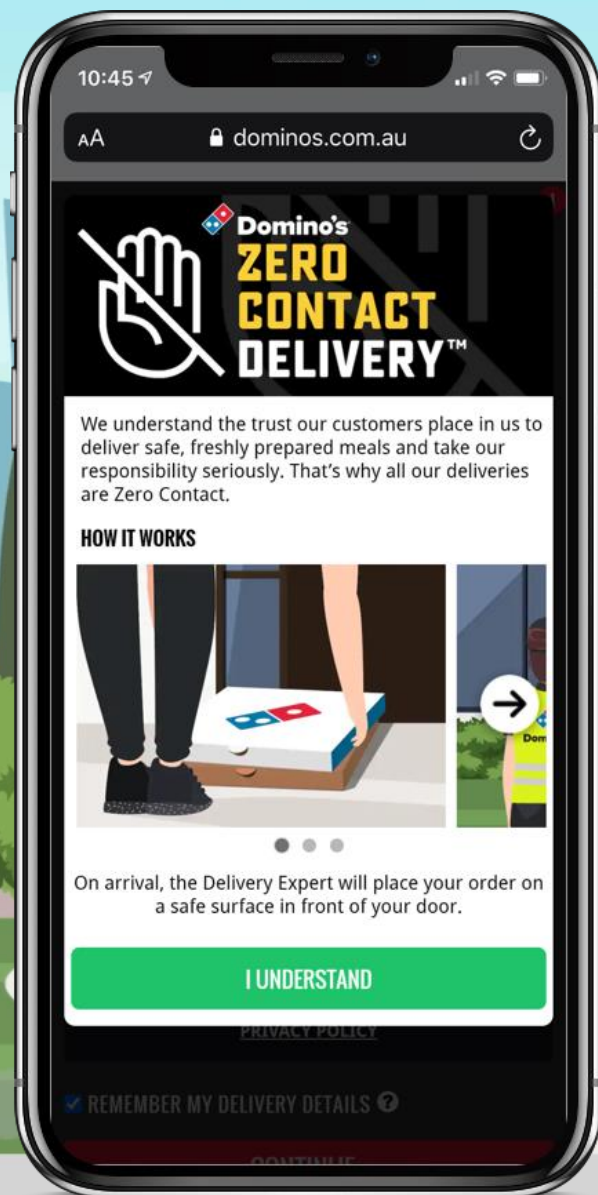
GET OFFERS

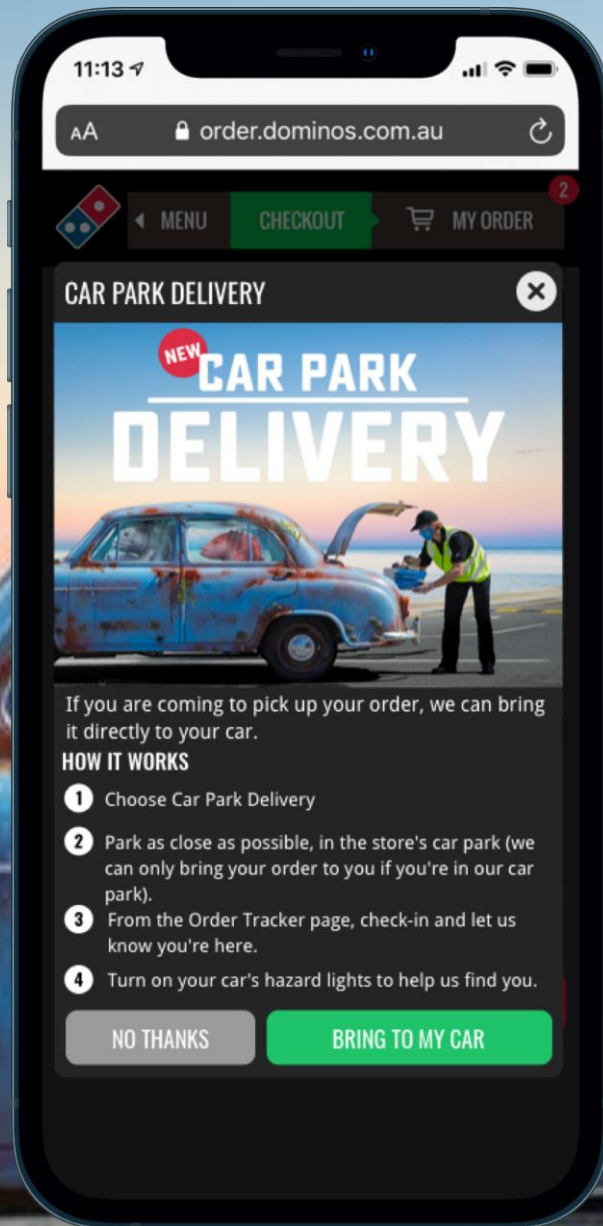
☒ Get VIP Offers via Email

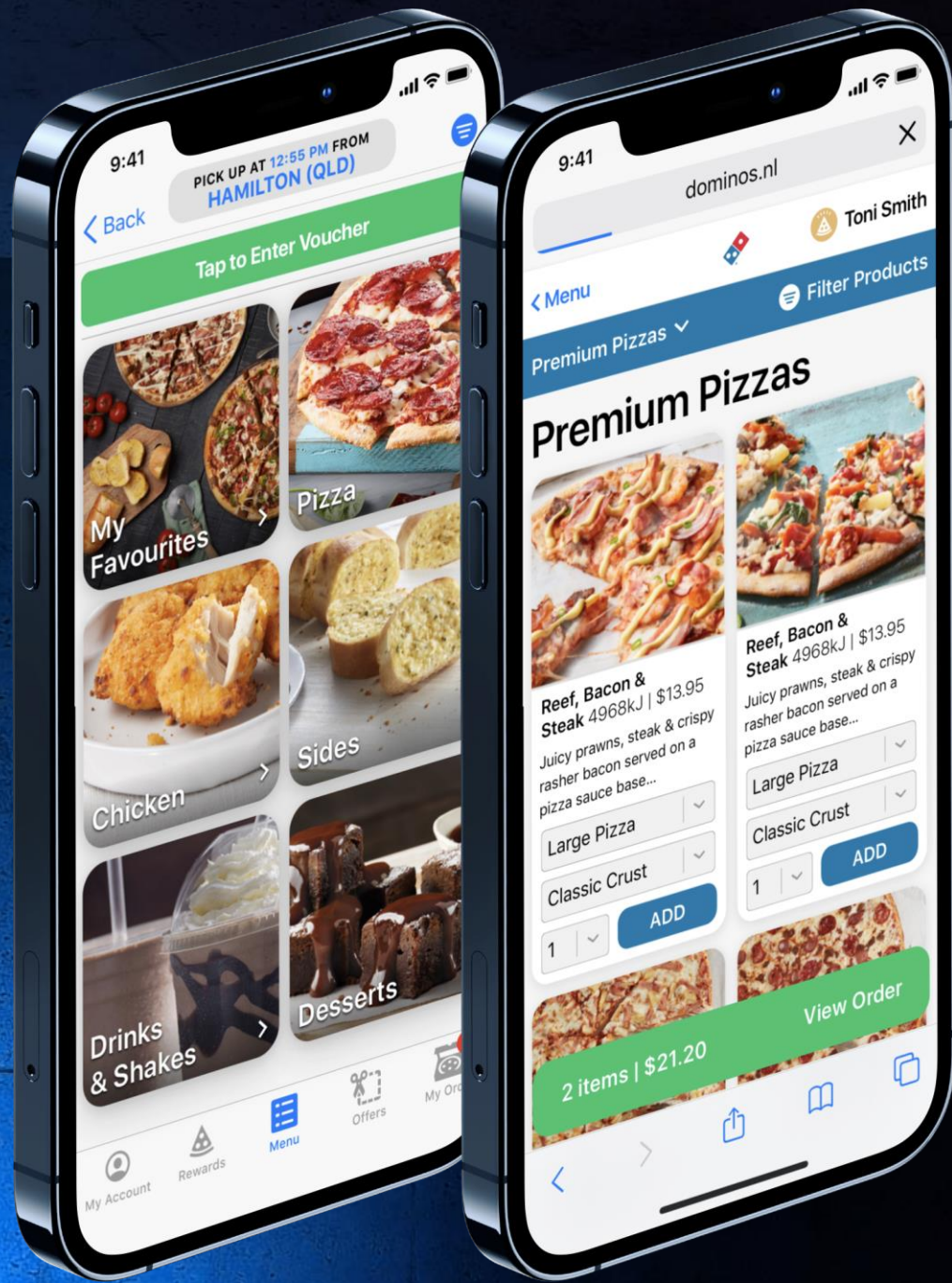
☒ Get VIP Offers via SMS

By joining, you agree to receive messages from Domino's, and you agree to our [Terms and Conditions](#)









NEW APP AND WEB ORDERING EXPERIENCES





Time is the Enemy of Food

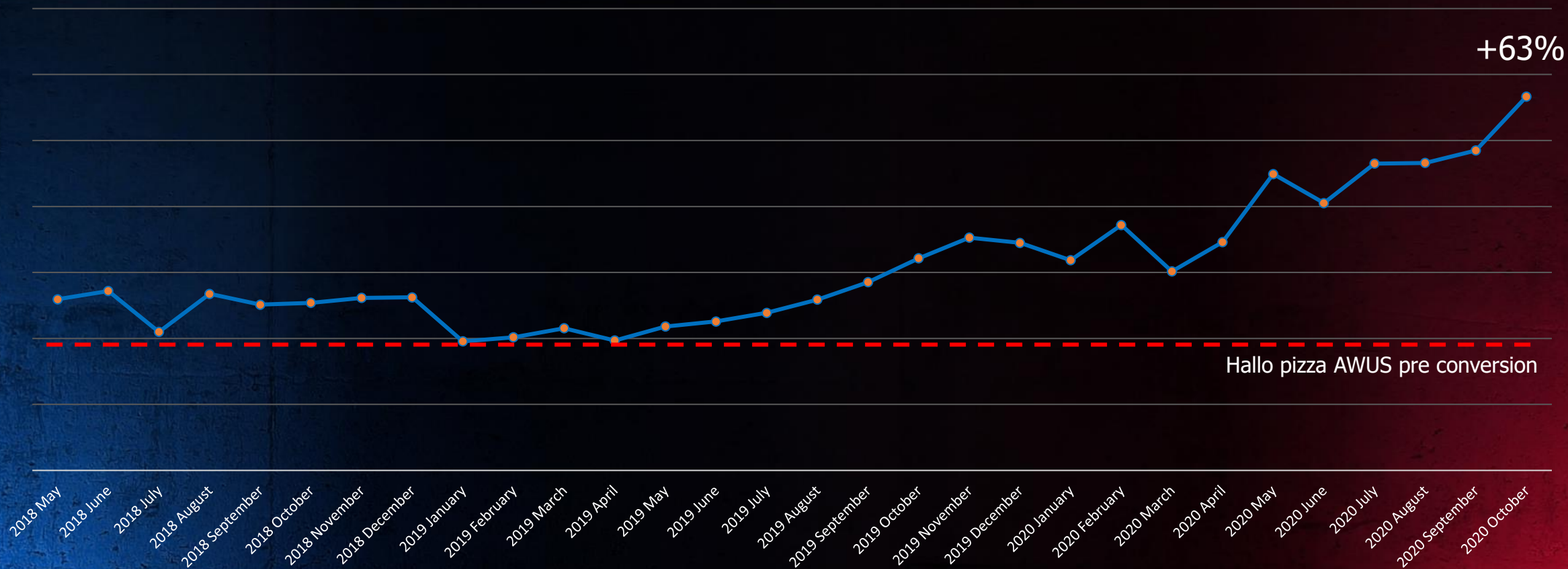
Stoffel Thijs
CEO GERMANY

Focus for Germany

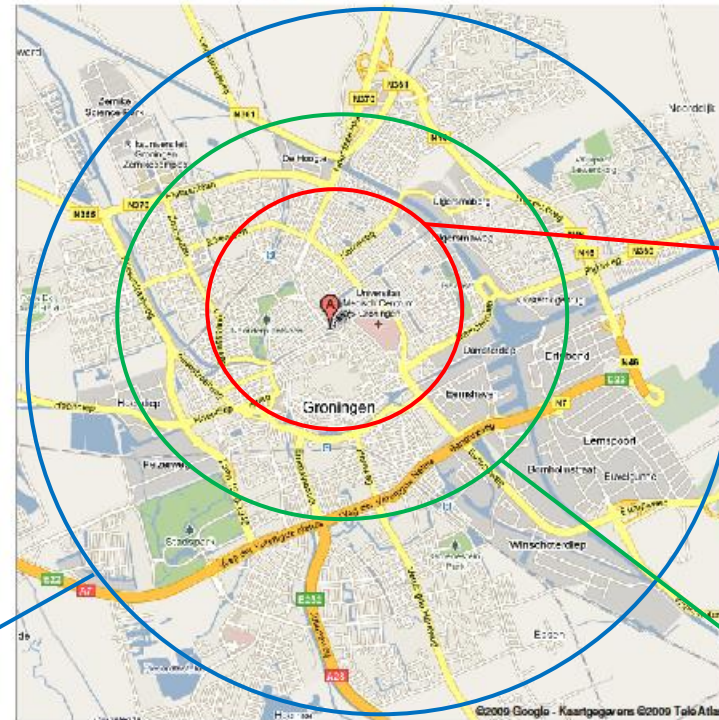
1. High Volume Mentality
2. Optimising customer experience and franchisee profits by fortressing



Weekly Sales of ex-Hallo Pizza



Google maps Adres Boterdiep 1
9712 Groningen
Nederland



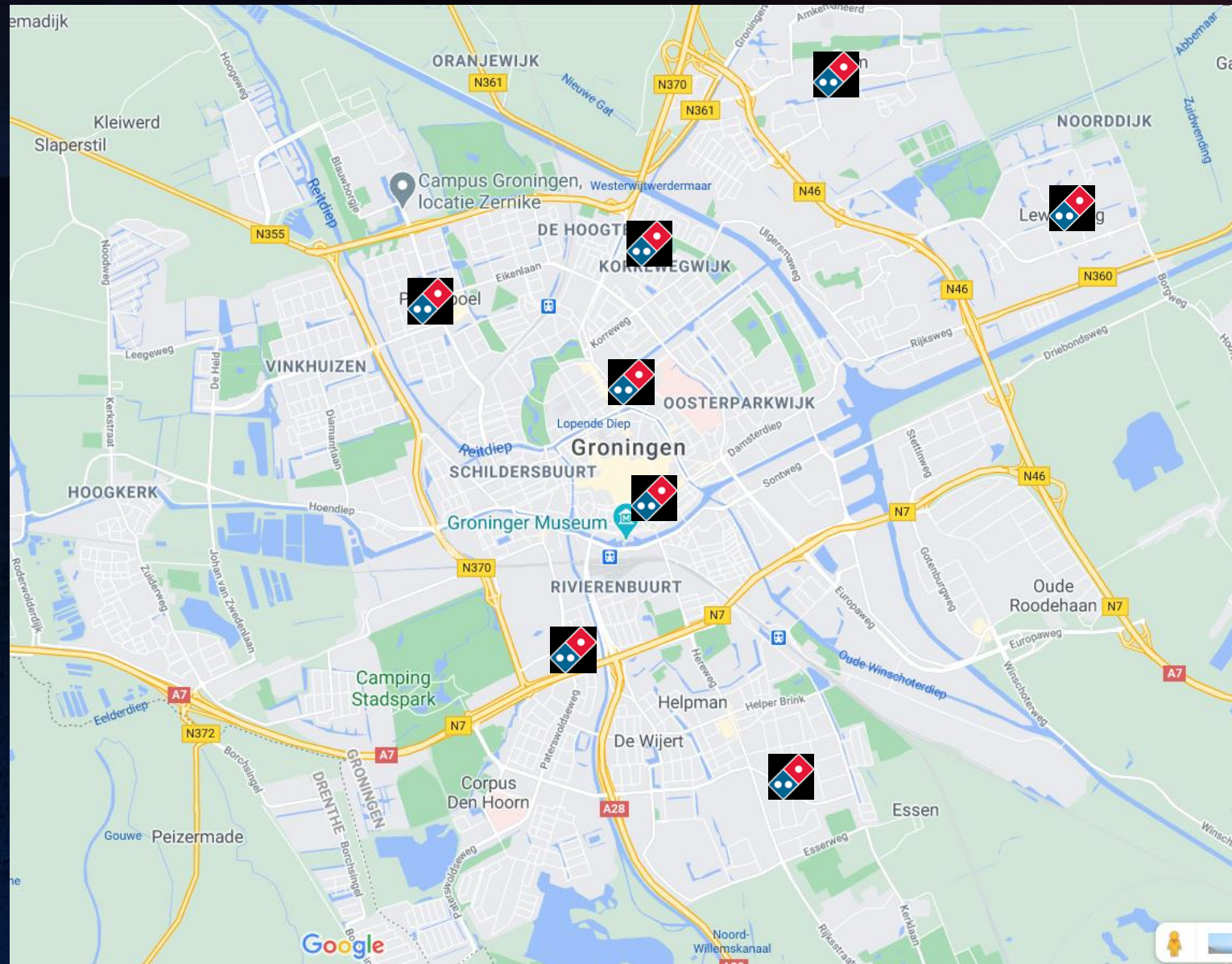
19.342 Households
13% Customers
4 deliveries/hour

59.082 Households
8% Customers
2 deliveries/hour

Zone Red=> 13% Customers
Zone Green => 8 % Customers
Zone Blue => 5 % Customers

33.454 Households
11% Customers
3 deliveries/hour





Product + Service + Image

Price

=

Value





Focus for Germany

1. High Volume Mentality
2. Optimising customer experience and franchisee profits by fortressing





Data Driven store location

Lachlan Kusher

PORTFOLIO PERFORMANCE & DATA VISUALISATION

The Opportunity



Speed



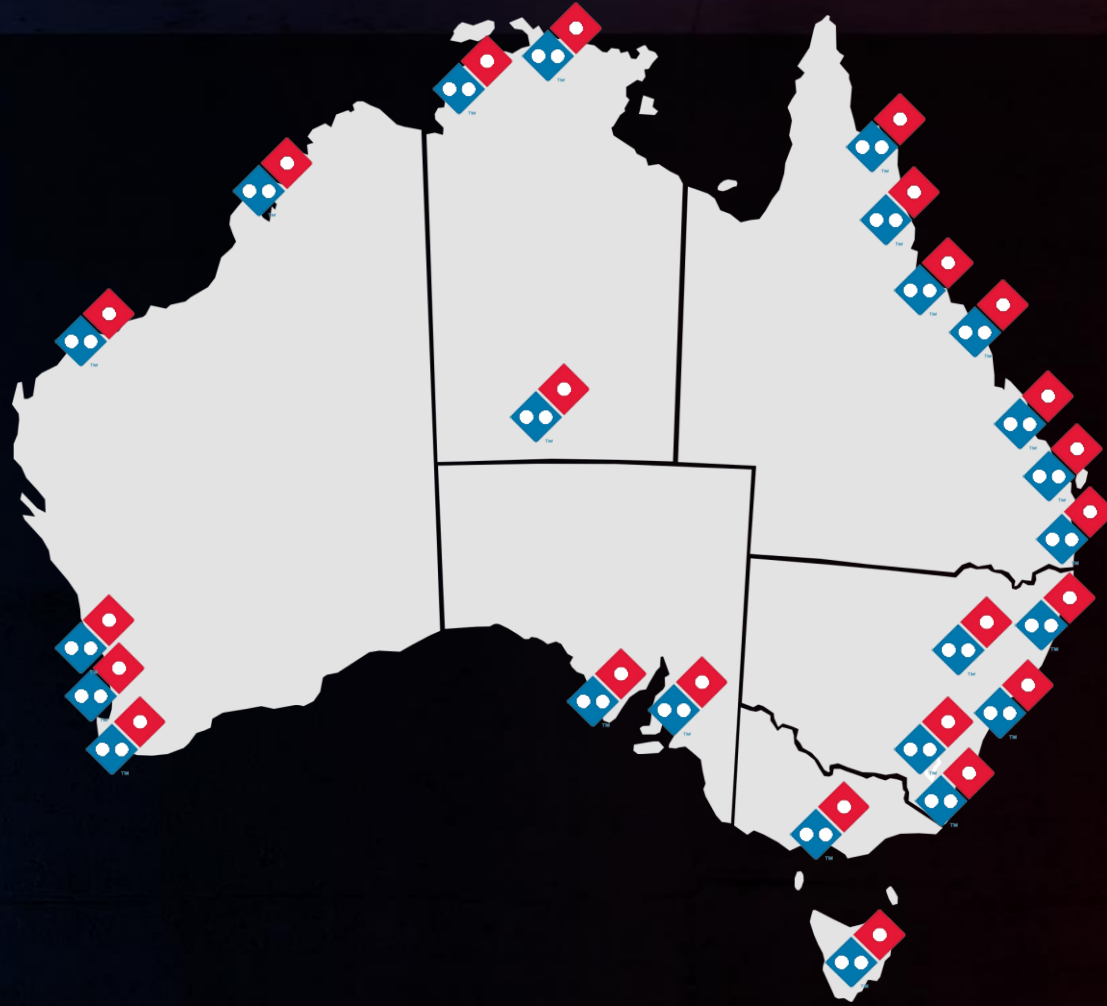
Distance



Proximity



The Opportunity



Locations are Indicative Only

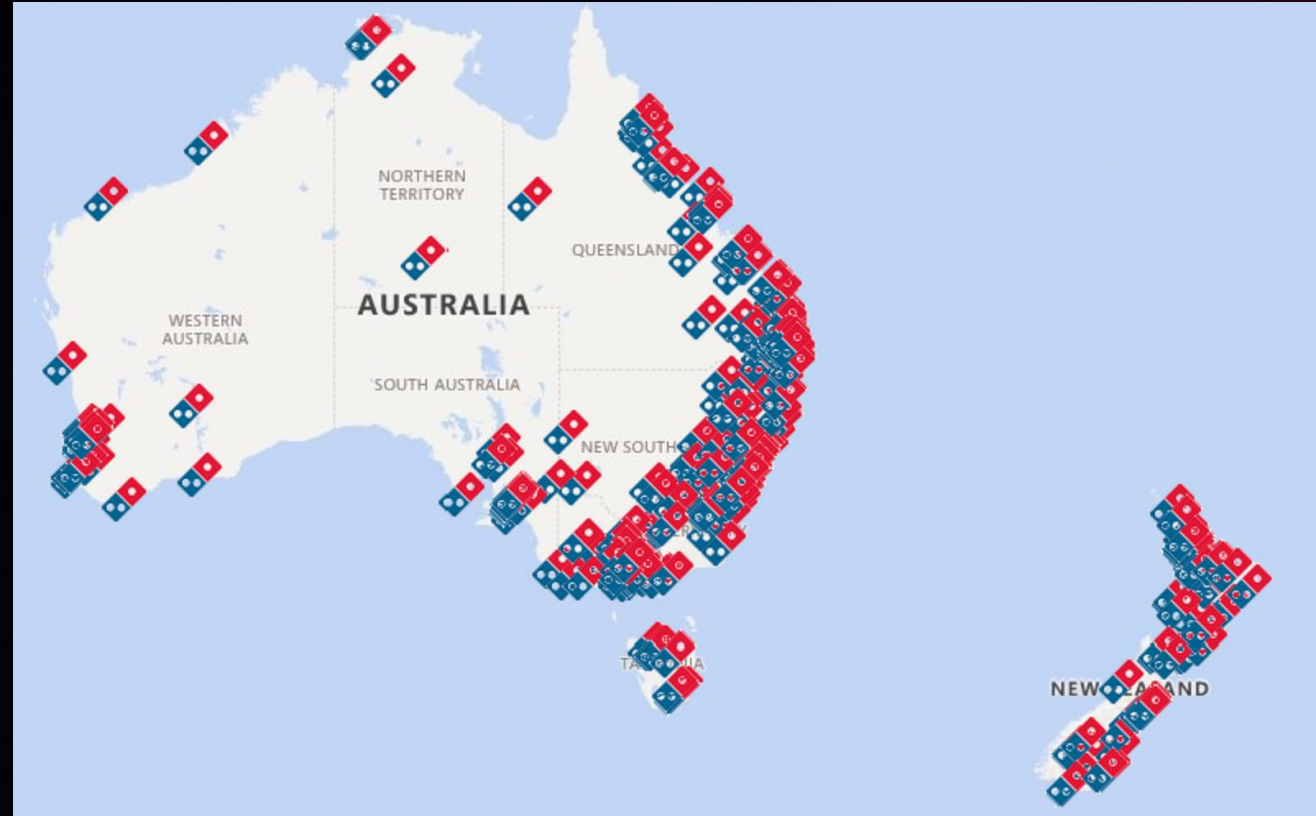


ANZ Store Expansion Targets

Current: 839 stores

- Australia: 703 stores
- New Zealand: 136 stores

Target: 1,200 stores by 2025-28



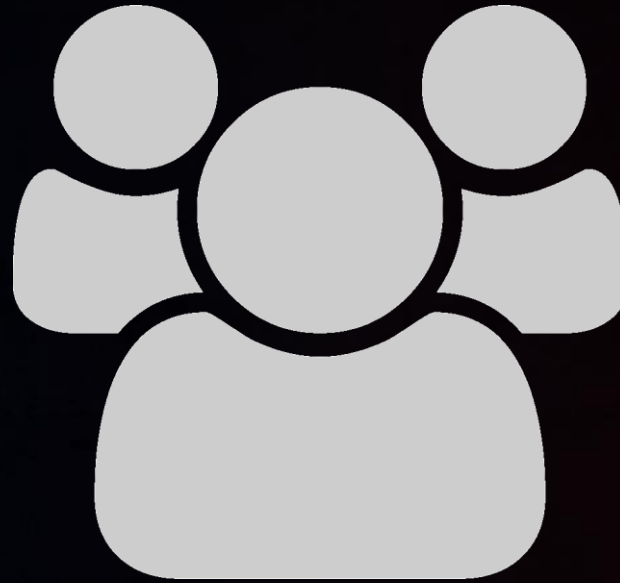
** Store Counts as at Wednesday 21st October 2020*



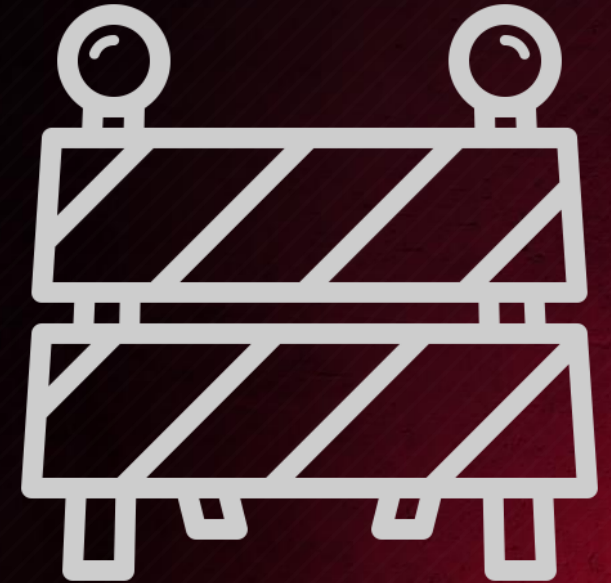
ANZ Store Expansion Targets



Data



Customers



Barriers



The Facts



The Facts

- **Franchisees have a defined delivery territory**
 - Exclusive rights to that territory
 - Defined period (usually 10 years)
- **Delivery is a significant part of our sales**
 - Will continue to increase in the future
- **We know the costs of delivery**
 - Wages, vehicle costs, time
- **We know what external factors can influence costs**
 - Traffic, infrastructure, distances
- **Working with Industry Leaders**
 - Partnering with Equifax to deliver best in class solutions



The Facts

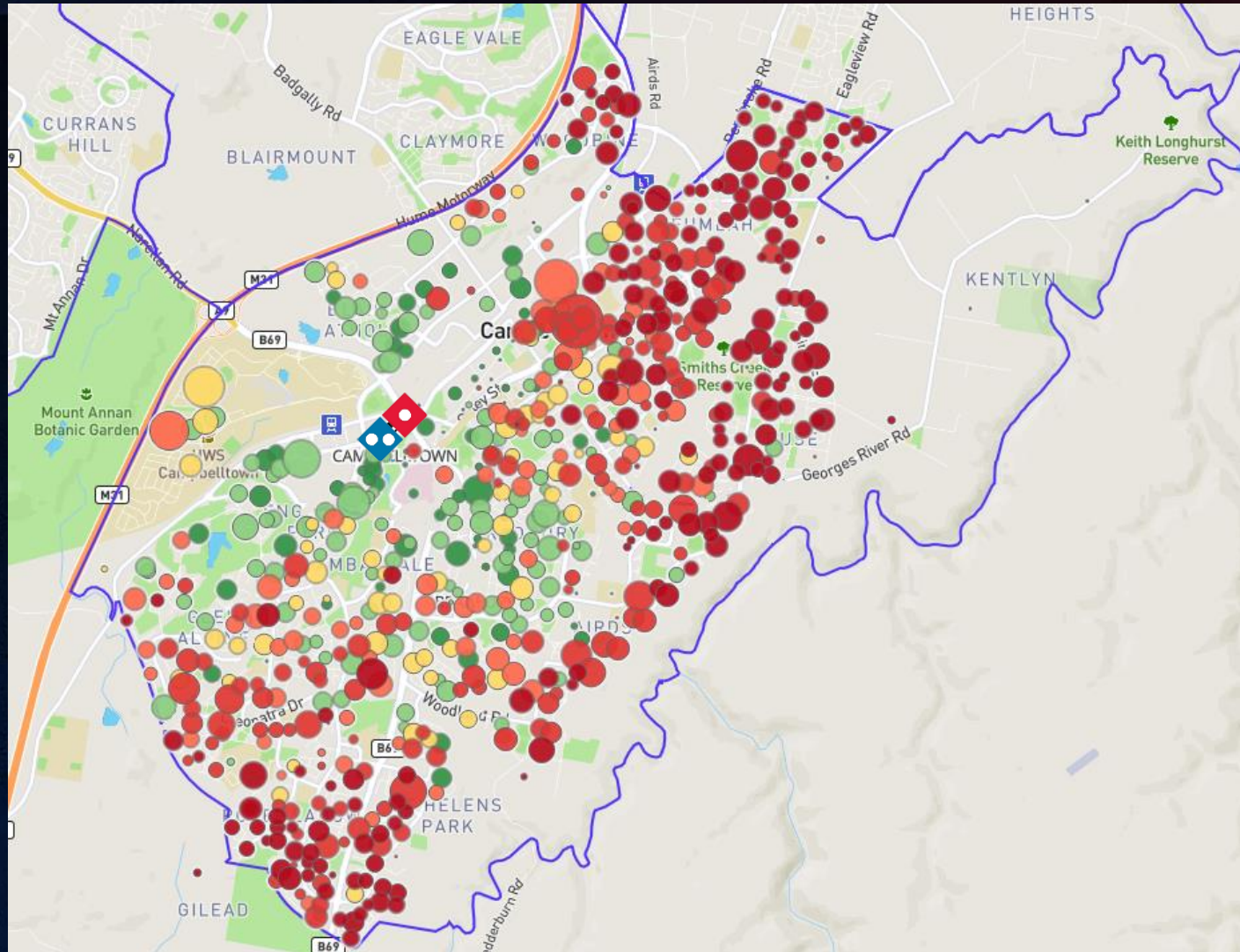
We're using data to focus on more than just sales, we're focusing on maximising profitability of all orders.



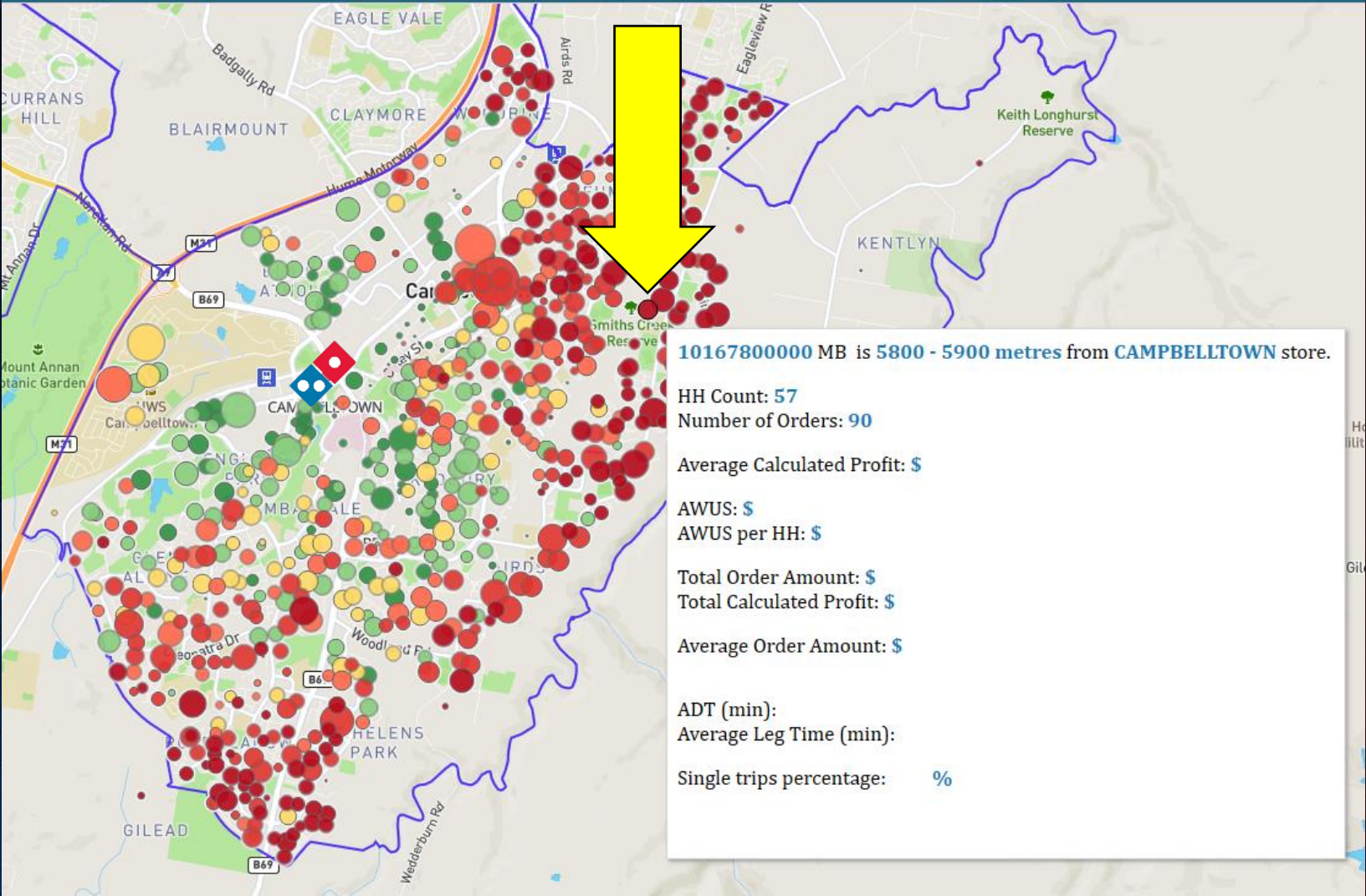
Territory Fortification & New Store Identification Process



Campbelltown, NSW



Campbelltown, NSW



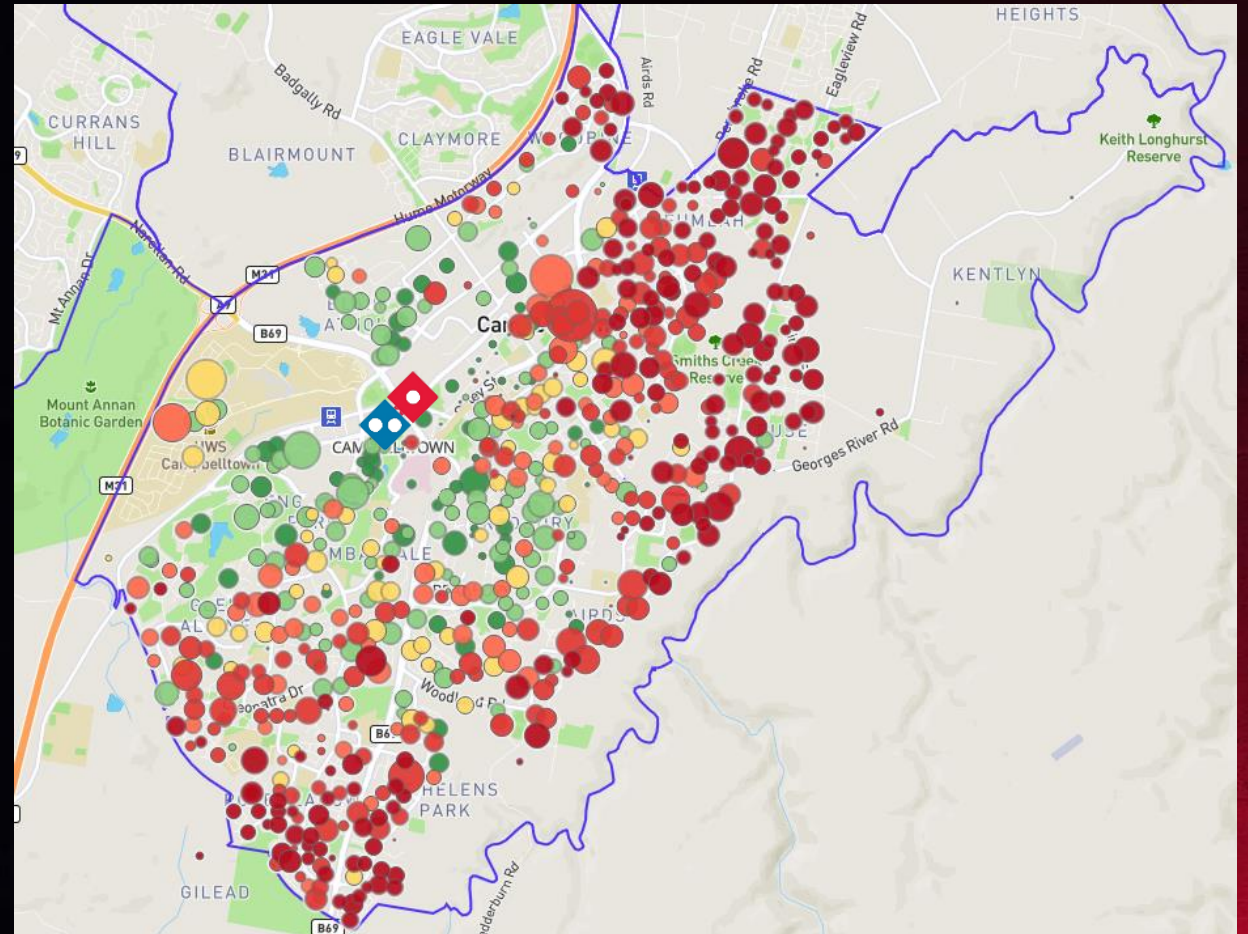
Campbelltown, NSW

Campbelltown
35,251 Deliverable Addresses

Sales

~\$55,000 Avg. AWUS*

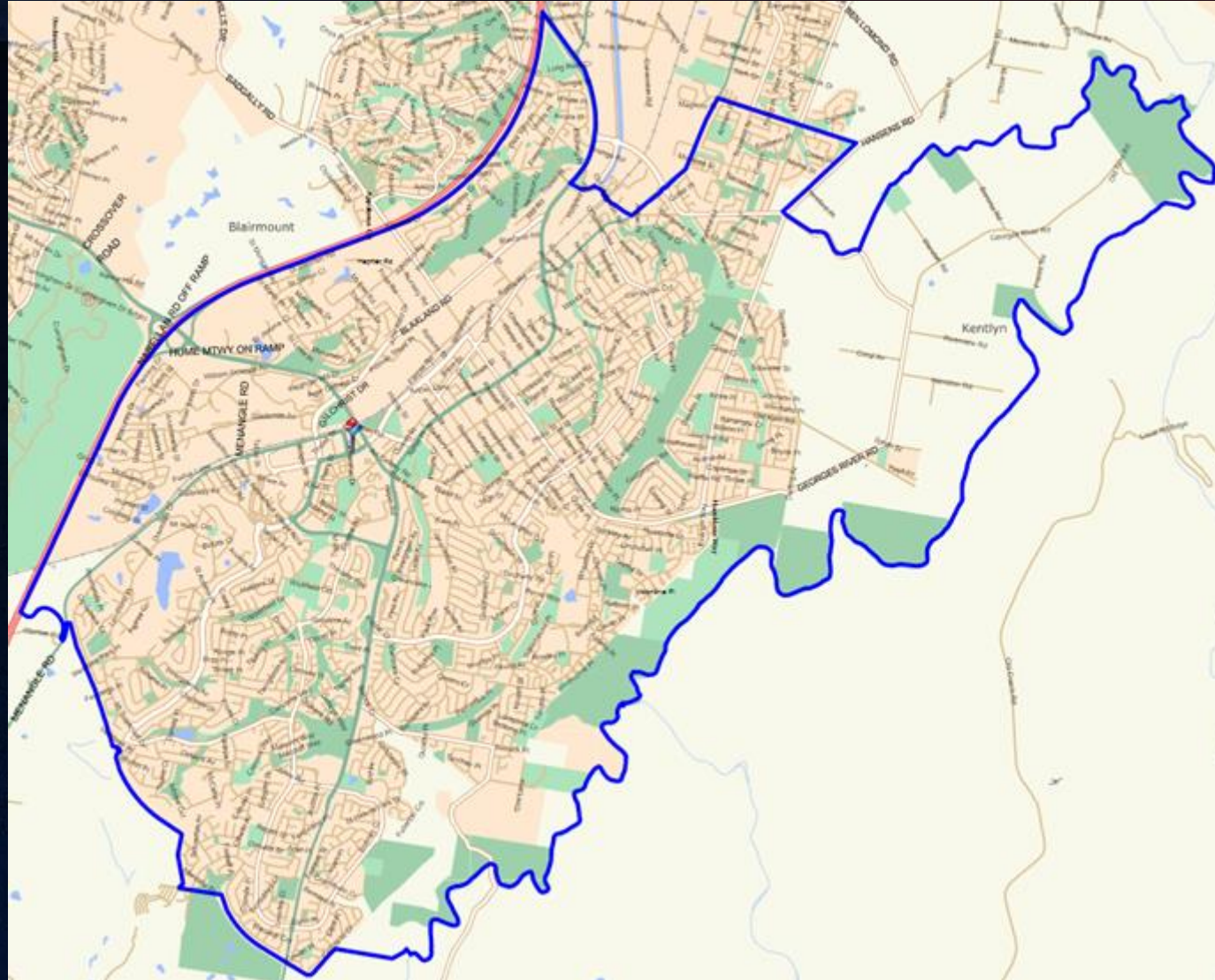
- 60% Delivery
- 40% Carry Out



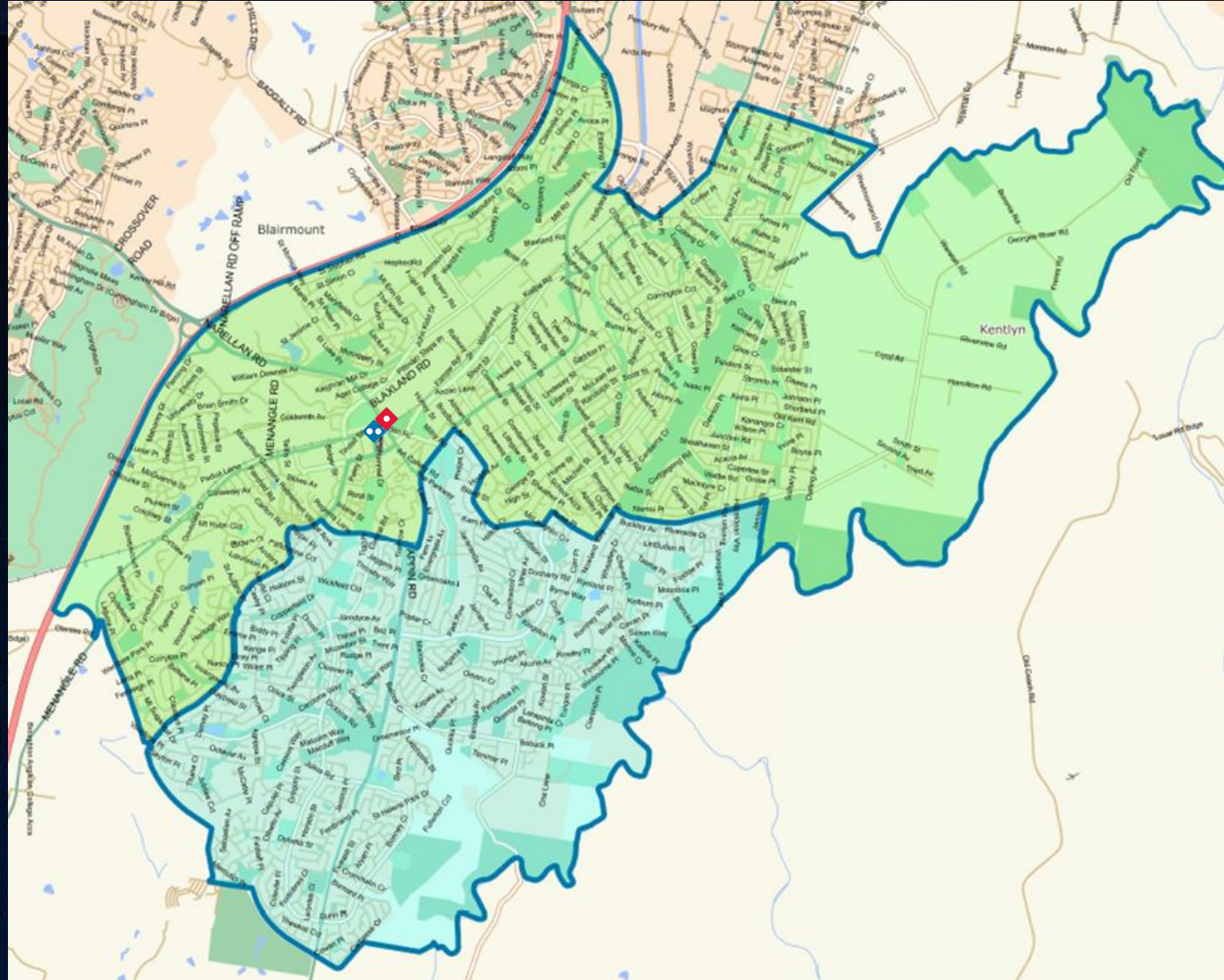
* AWUS sales are provided from Pulse for the 52 week period from W/E 7/04/19 to W/E 1/3/20



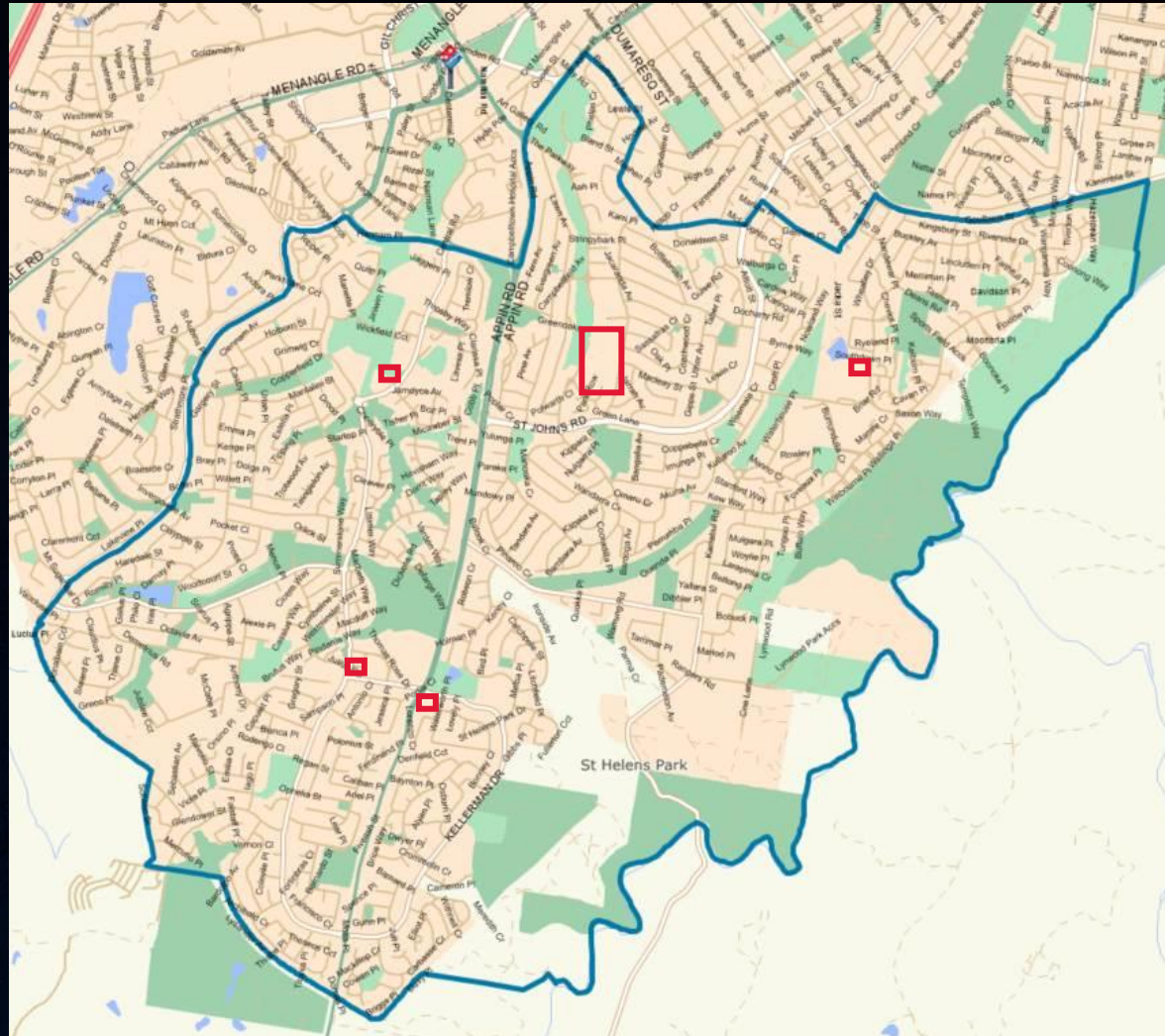
Campbelltown Sales By Street Review



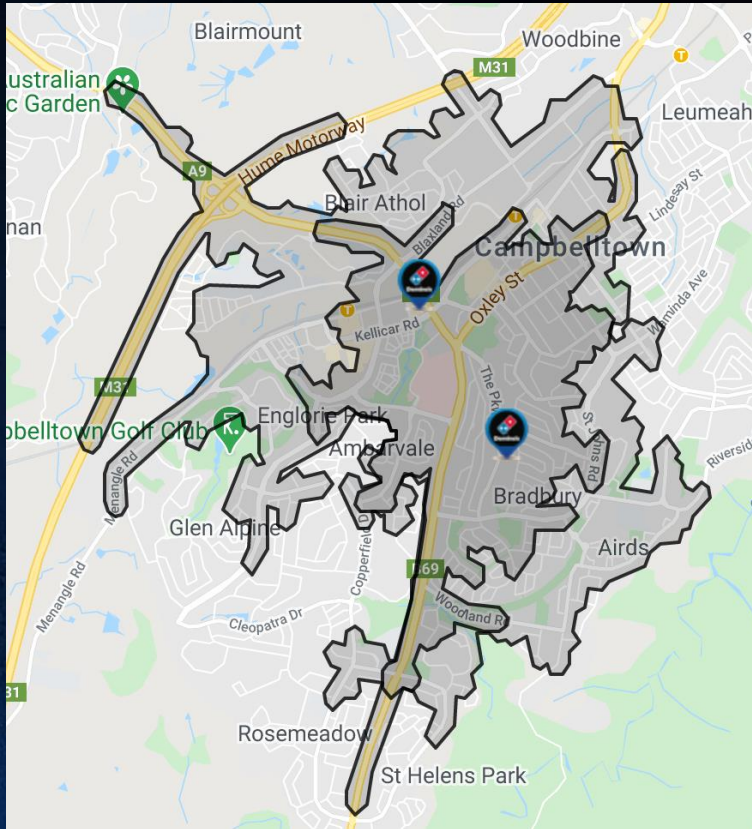
Campbelltown & Bradbury (NEW), NSW



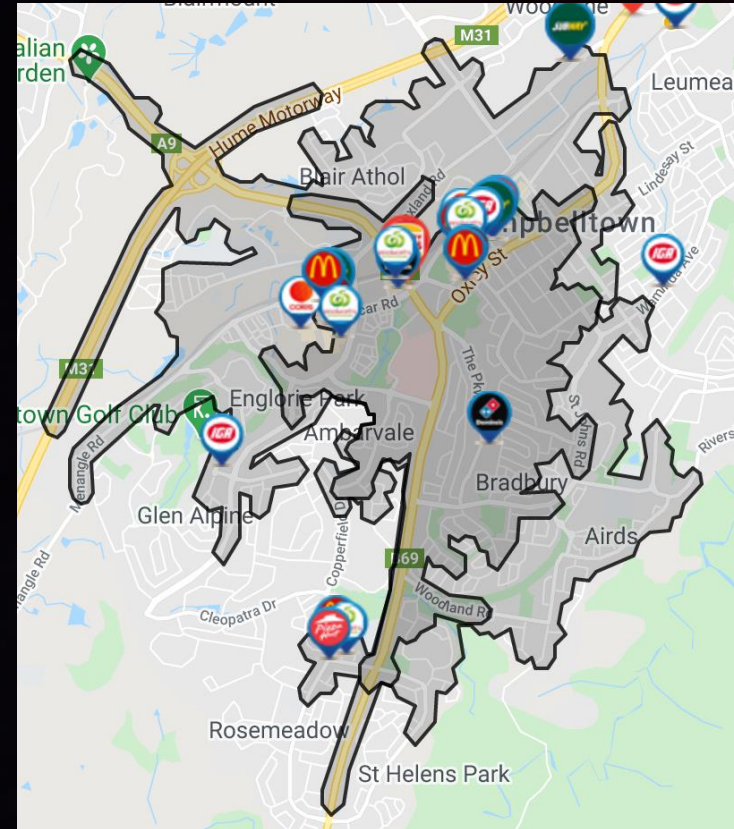
Bradbury – Potential Locations



Locations & Drive Time



Domino's Locations

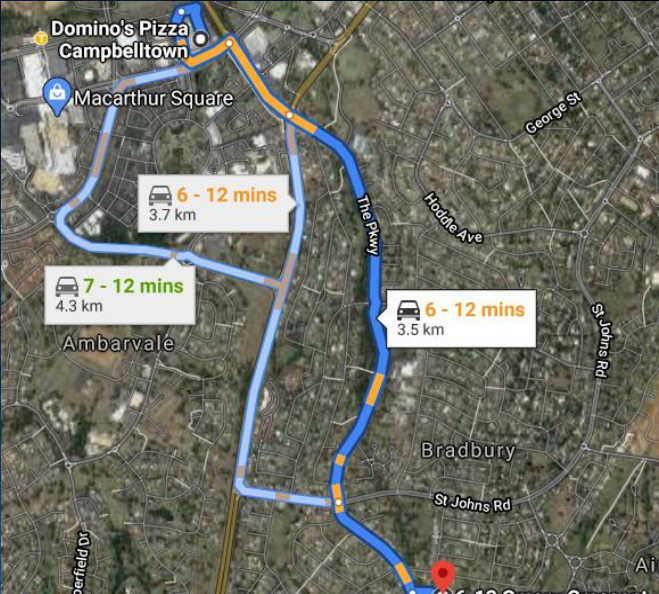


Competitor Locations

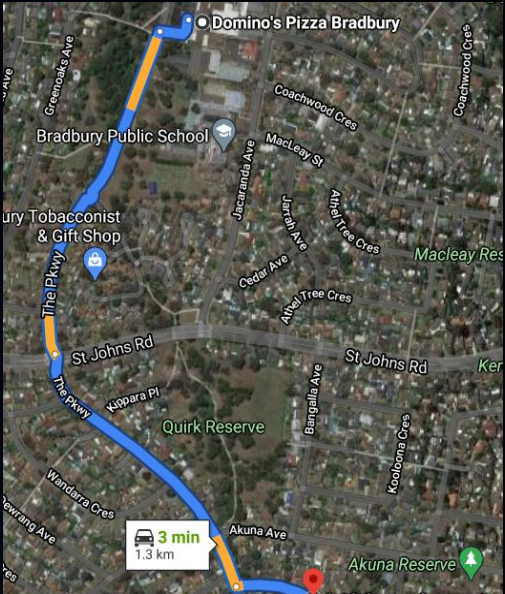


Improved Drive Times & Profitability

Campbelltown



Bradbury

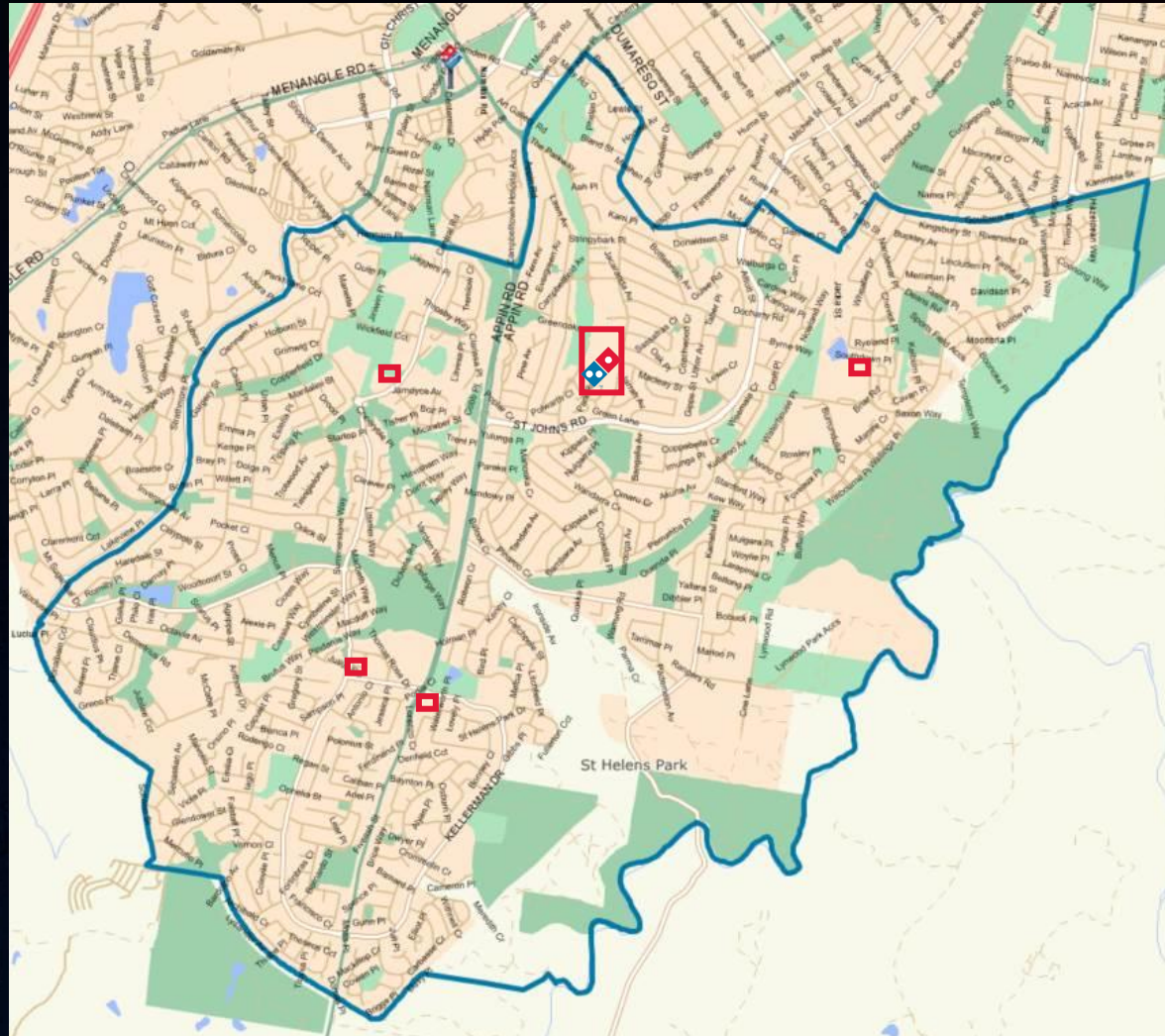


Store	Delivery Address	Drive Distance	Estimated Drive Time*	Profitability %
Campbelltown	Omaru Crescent	3.5 km	12 min	2.00%
Bradbury		1.3 km	3 min	34.10%

* Estimated drive time based on data extracted from Google Maps. Drive time is based on use of a personal car with departure from origin (store) at 6pm on a Friday night.



Bradbury – Selected Locations



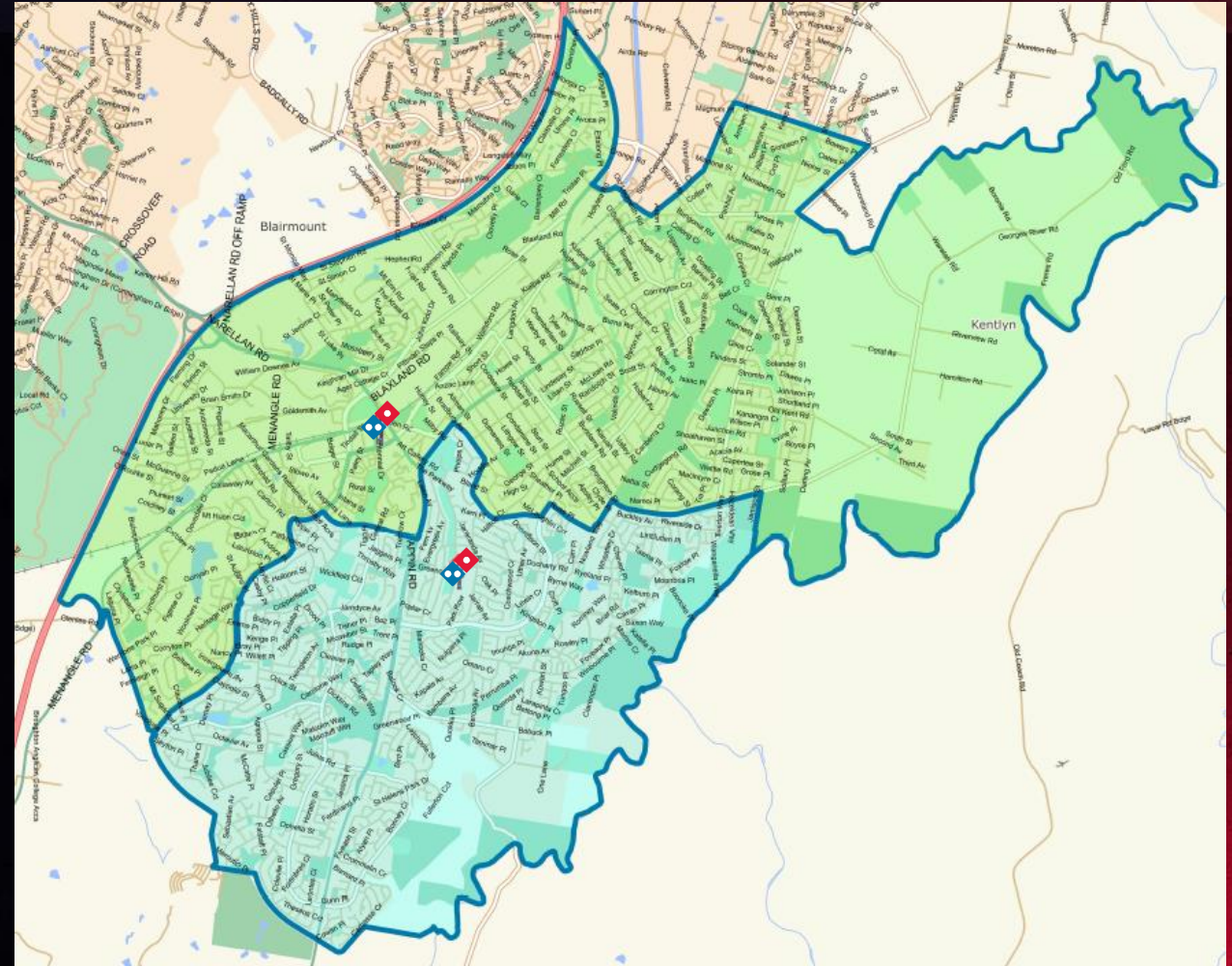
Territory Fortification & New Store

Campbelltown

21,058 Deliverable Addresses

Bradbury (New)

14,193 Deliverable Addresses



**How do we know if
territory fortification
was successful?**



Post Fortification

Campbelltown

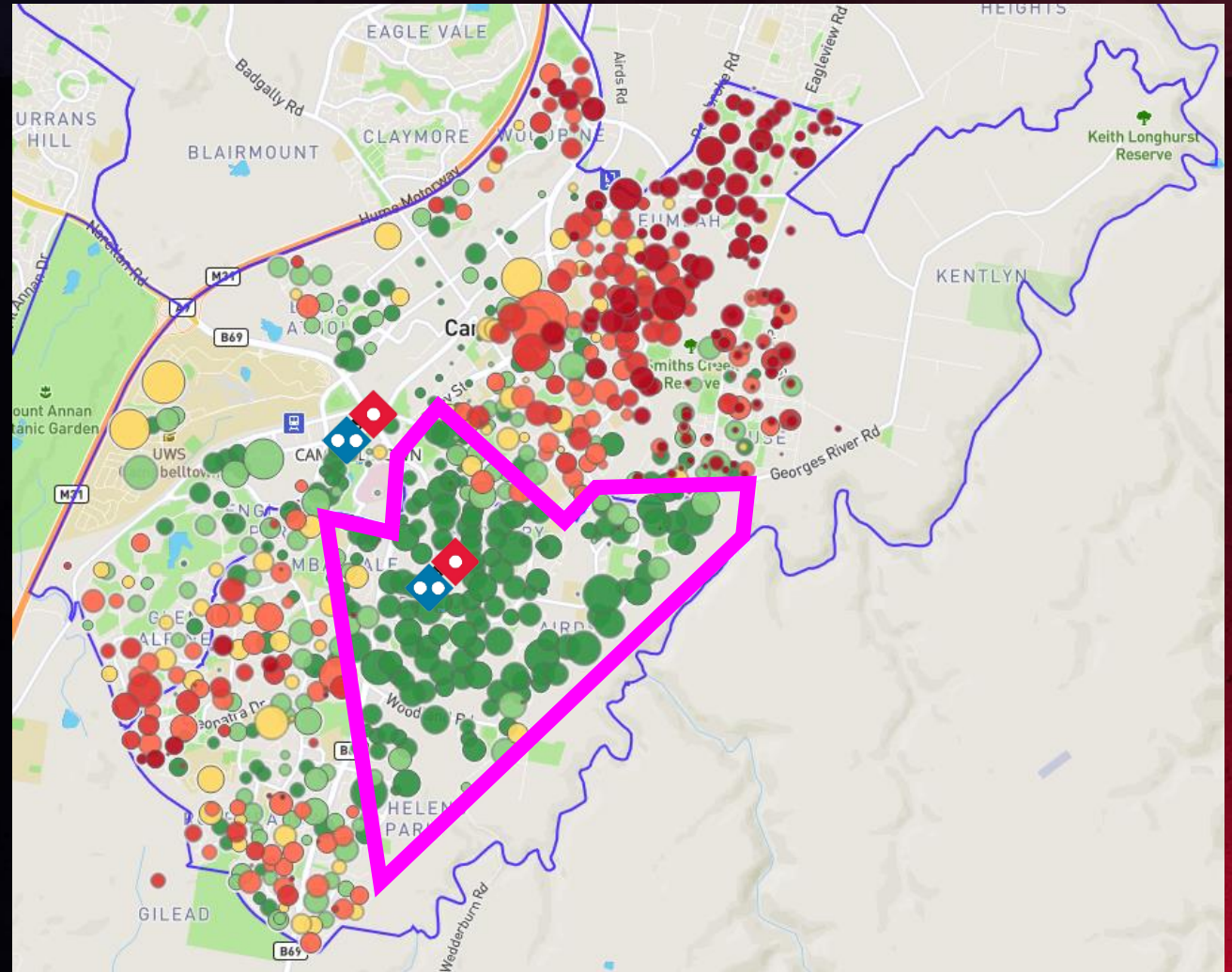
~\$40,000 Avg. AWUS

- 57% Delivery
- 43% Carry Out

Bradbury (New)

~\$41,000 Avg. AWUS

- 62% Delivery
- 38% Carry Out



Conclusion



In Conclusion

More stores, closer to customers =

- Increased Sales
- Fortified Territories
- Faster Deliveries
- Better Product
- Better Service
- Increased Brand Reputation
- **Increased Profitability**



