



Domino's Pizza Enterprises Limited  
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**6 June, 2022**

## **Asia Investor Day presentation and leadership announcement**

Domino's Pizza Enterprises Ltd (ASX.DMP) is today hosting an investor day in Tokyo, Japan, regarding the operations and strategy for the Company's Asia businesses.

A trading update is not being provided. The presentations are included in this announcement.

### **Leadership**

Domino's Pizza Enterprises Ltd (Domino's) is pleased to announce the appointment of two experienced executive to drive continued growth in Asia.

**Martin Steenks**, currently CEO Domino's Taiwan, has been appointed CEO of Domino's Japan. Mr Steenks was appointed CEO of Taiwan on acquisition, following a successful multi-decade career in Domino's, including as a multi-unit store franchisee, for which he was recognised as one of the best franchisees in Domino's globally.

Since his appointment to the Taiwan leadership role, Domino's Taiwan has accelerated store opening, with +11 new stores already opened this financial year (+7%).

**Ronald Dekker**, Chief Development & Brand Design Officer, has been appointed CEO of Domino's Taiwan. Mr Dekker has decades of Domino's experience, including as an award winning multi-unit franchisee. He successfully grew one of his stores, Leiden, to the highest sales in the Netherlands, was the Dutch franchisee of the year in multiple years, and won a leadership award in 2009.

Mr Dekker has previously served as the Development Director, Netherlands, and Head of Brand Design, where his responsibilities included design, growth and store development.

Both executives will take up their new roles in July, and reside in their respective markets of responsibility. They will report to Josh Kilimnik, CEO APAC. This will complete Mr Kilimnik's transition into the CEO APAC role.

Mr Kilimnik said Mr Steenks and Mr Dekker would bring their awarded Domino's franchising expertise to Japan and Taiwan, working with franchisees and experienced team members in head office, and stores to continue the rapid pace of growth in Asia.

"It's my pleasure to appoint such experienced leadership from within our business, leadership which the Domino's system has helped to grow and prosper over the past decades, and which will help another generation of leaders follow in their path."

To hear more from Mr Steenks and Mr Dekker, visit <https://investors.dominos.com.au/videos>

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](mailto:investor.relations@dominos.com.au) or on+614 1924 3517.



# ASIA INVESTOR DAY 2022

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

TAIWAN

# GROUP OVERVIEW

PRESENTED BY



**DON MEIJ**

**GROUP CEO & MANAGING DIRECTOR**



# INDEX



**1. A FOUNDATION FOR GROWTH**

**2. OUR LONG-TERM FUTURE**

**3. HOW DPE WILL DELIVER**



# OUR PURPOSE



## 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.

OUR PIZZA  
BRINGS PEOPLE  
*closer*

## 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



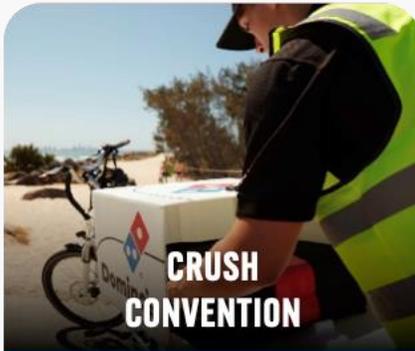
### BE GENEROUS AND PROVIDE JOYFUL EXPERIENCES

At Domino's, we're not just selling pizza. We're selling happiness and the joy of connection. Our spirit of **optimism, empathy** and **generosity** is catching. So let's share it with every customer.



### DO THE RIGHT THING BECAUSE IT'S THE RIGHT THING TO DO

We have a responsibility to care for our customers, our team and the communities who depend on us. We hold ourselves to a **high standard of integrity**, recognising how **valuable**, yet **fragile**, trust can be.



### CRUSH CONVENTION

We all know there are three main drivers in the food business – **fast service, affordable prices** and **good quality**. Traditional thinking says you have to settle for two out of three. We want to seamlessly deliver all three. Again. And Again.



### HELP PEOPLE GROW AND PROSPER

We want to make people better off – our **team**, our **franchisees**, our **investors**, and our **communities**. We balance commercial goals with a determination to give our team members rewarding experiences, opportunities and a great place to work.

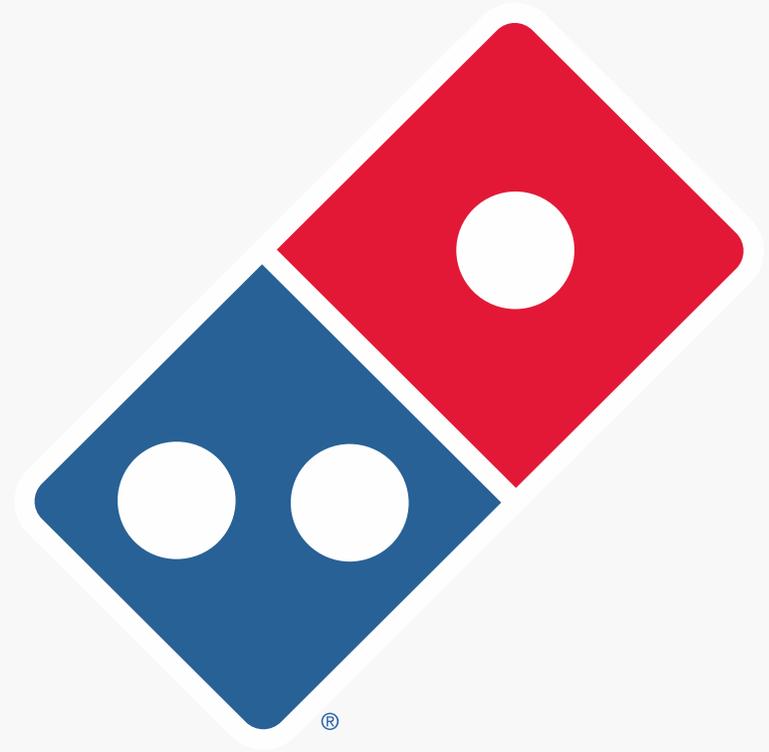


### INVEST TO CREATE DEVOTION

At Domino's we're not just aiming for customer satisfaction. We want to create customer devotion. A satisfied customer may come back again. But a devoted customer is a **customer for life**.

**A FOUNDATION  
FOR GROWTH**

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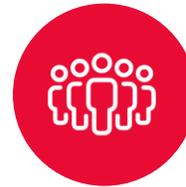


# KEY METRICS



## NETWORK SALES

\$3.74 BN (FY21)



## FRANCHISE STORE COUNT

79.5% (FY21)



## ONLINE SALES

78.2% (FY21)



## MARKETS

10: EU (6) APAC (4)



## NETWORK STORE COUNT

3327



## TOTAL POPULATION

365.2 MILLION PEOPLE

# KEY METRICS

## TWO-YEAR GROWTH



**NETWORK SALES**

+29.5%<sup>1</sup>



**MARKETS**

+ 1 (TAIWAN)<sup>2</sup>



**DIGITAL SALES**

+41.3%<sup>1</sup>



**MARKET POPULATION**

+23.3 MILLION (+7%)<sup>2</sup>



**NETWORK STORE COUNT**

+24.3%<sup>1</sup>



**EBIT**

+25.2%<sup>1</sup>

<sup>1</sup> H1 22 vs H1 20 as presented at HY results

<sup>2</sup> Population of Taiwan added to Group population following acquisition

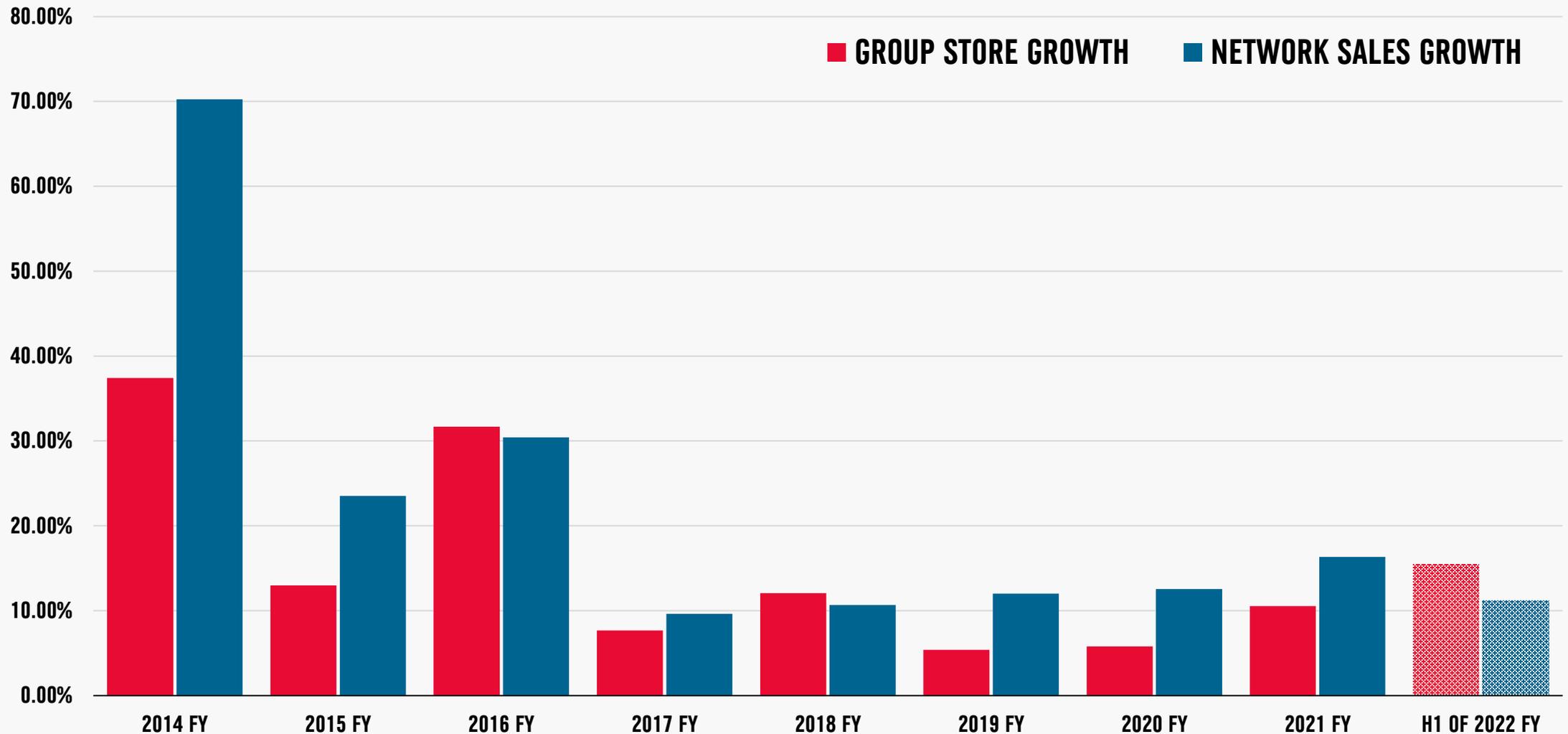
~ **1X**  
GDP CHINA

~ **1X**  
POP USA



**A TRACK RECORD OF ACQUIRING NEW MARKETS**

# ACHIEVING GROWTH THROUGH UNCERTAIN TIMES

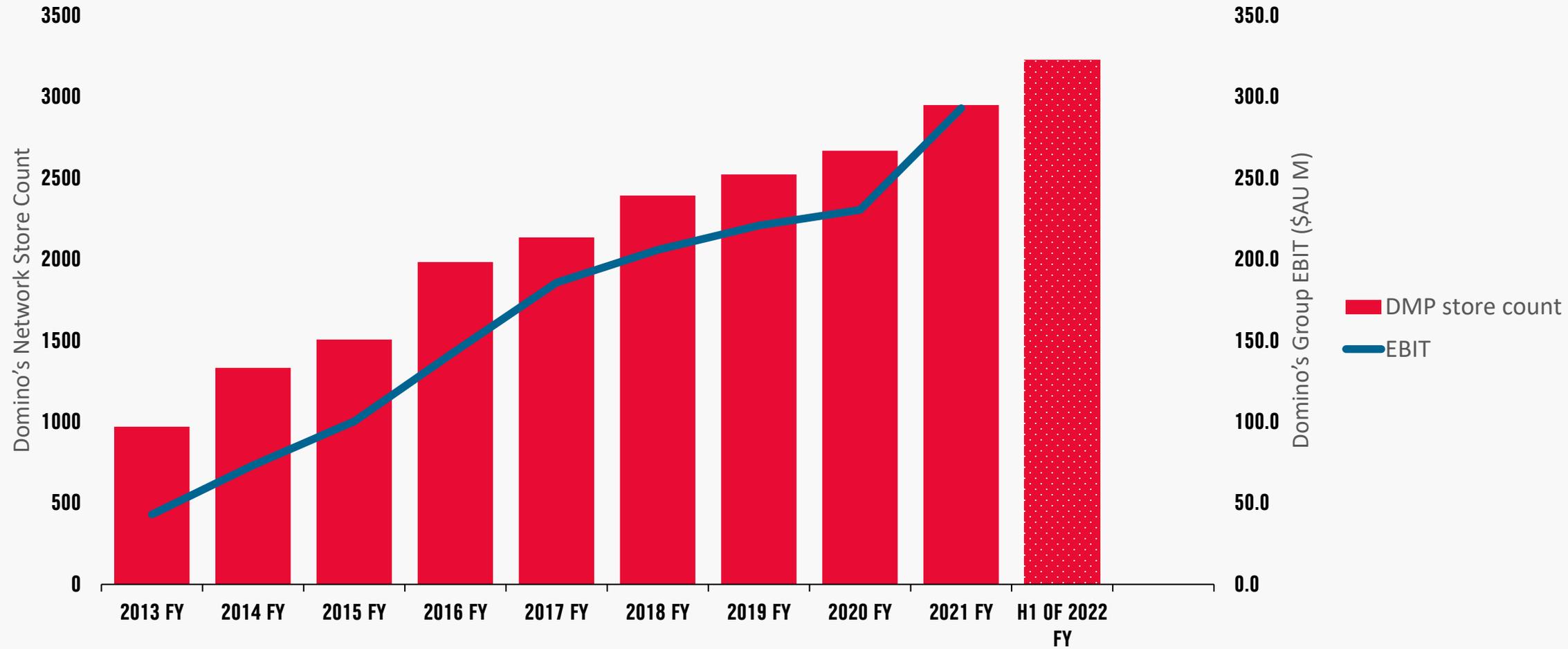


Network sales in \$AUD

Store growth includes acquisitions: Japan (FY14), Germany (FY16), Hallo Pizza, (FY18), Denmark (FY19) and Taiwan (FY22).

# ACHIEVING GROWTH THROUGH UNCERTAIN TIMES

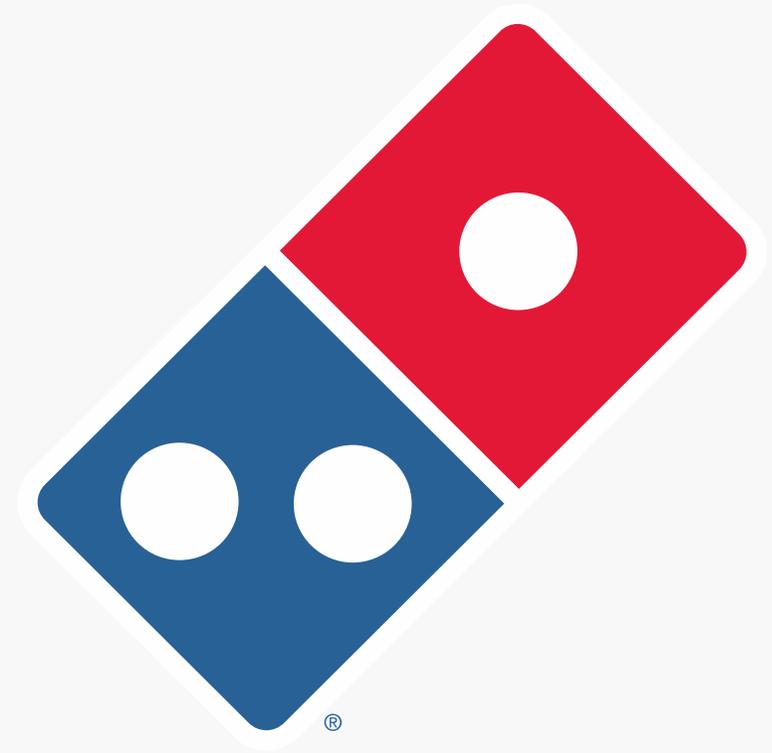
## GROUP STORE COUNT AND EBIT GROWTH (\$MILLION)



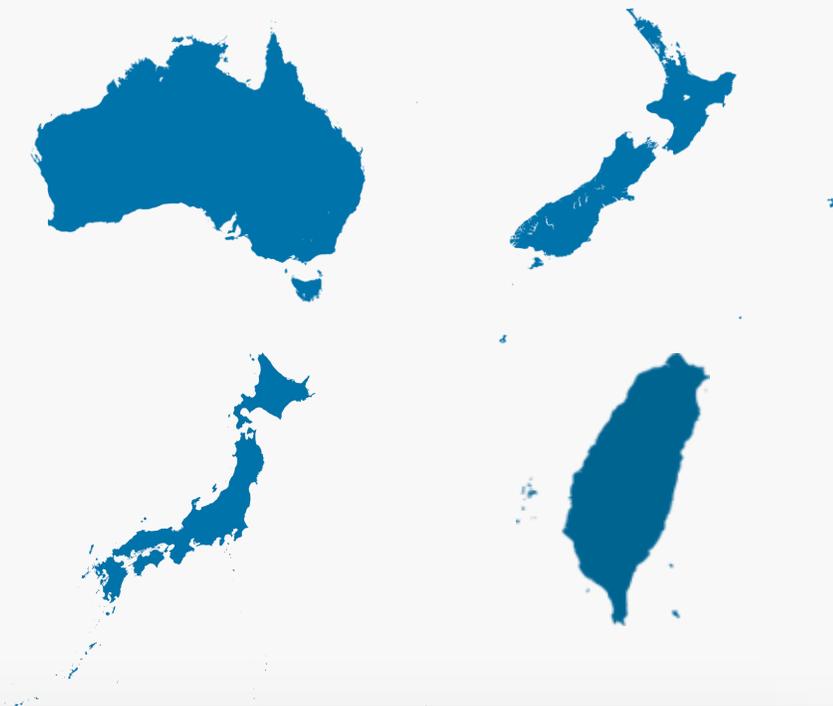
DMP adopted IFRS from the beginning of FY20

**OUR LONG-TERM  
FUTURE**

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# LONG TERM OUTLOOK - APAC



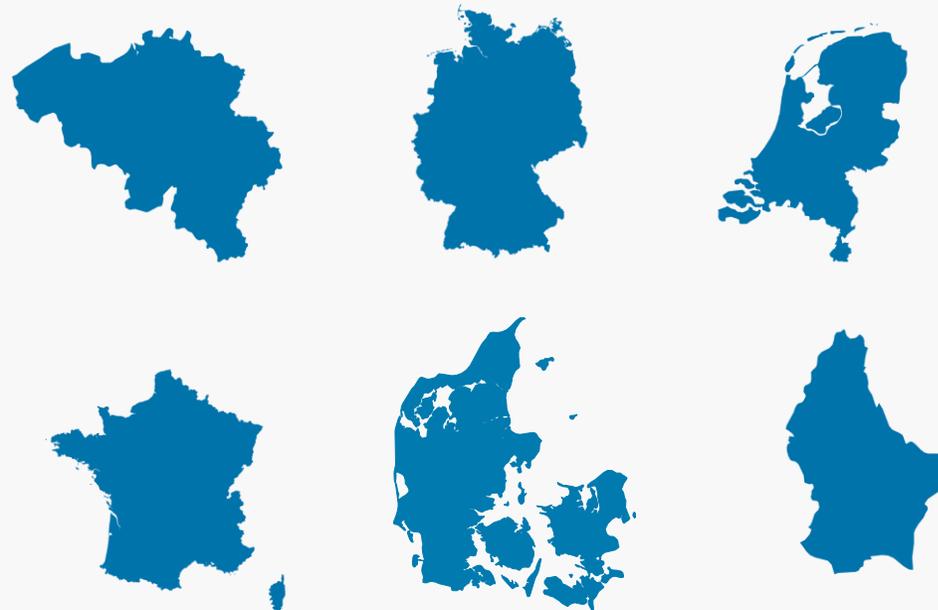
CURRENT STORE COUNT

**1,959**

FUTURE STORE OUTLOOK

**3,600 (+83.8%)**

# LONG TERM OUTLOOK - EUROPE



## FUTURE STORE OUTLOOK

**3,050 (+123.0%)**

# MEDIUM TERM OUTLOOK

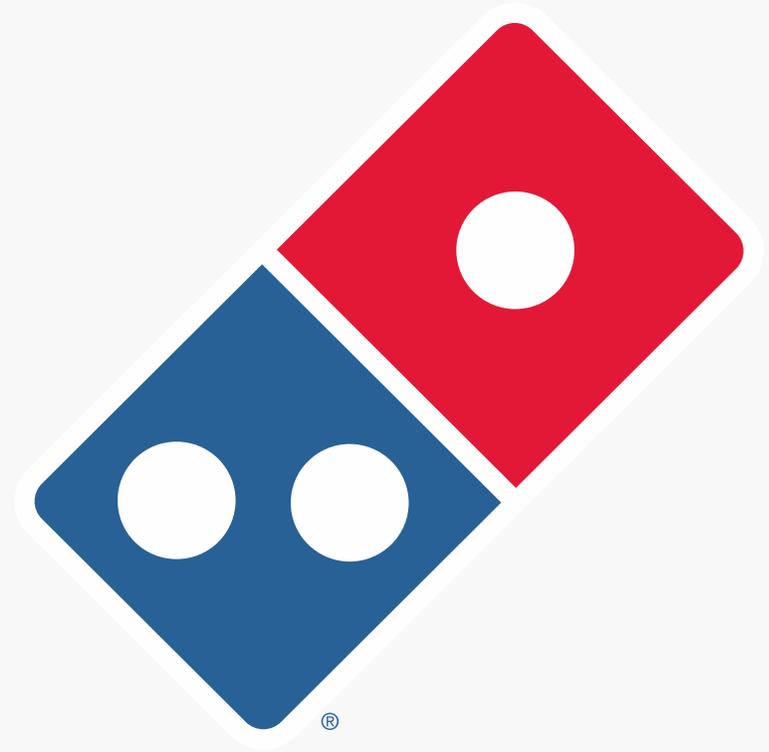


3-5 YEAR NEW STORE OUTLOOK  
**+9-12% OF NETWORK<sup>1</sup>**

1 growth per annum

**HOW DPE WILL  
DELIVER**

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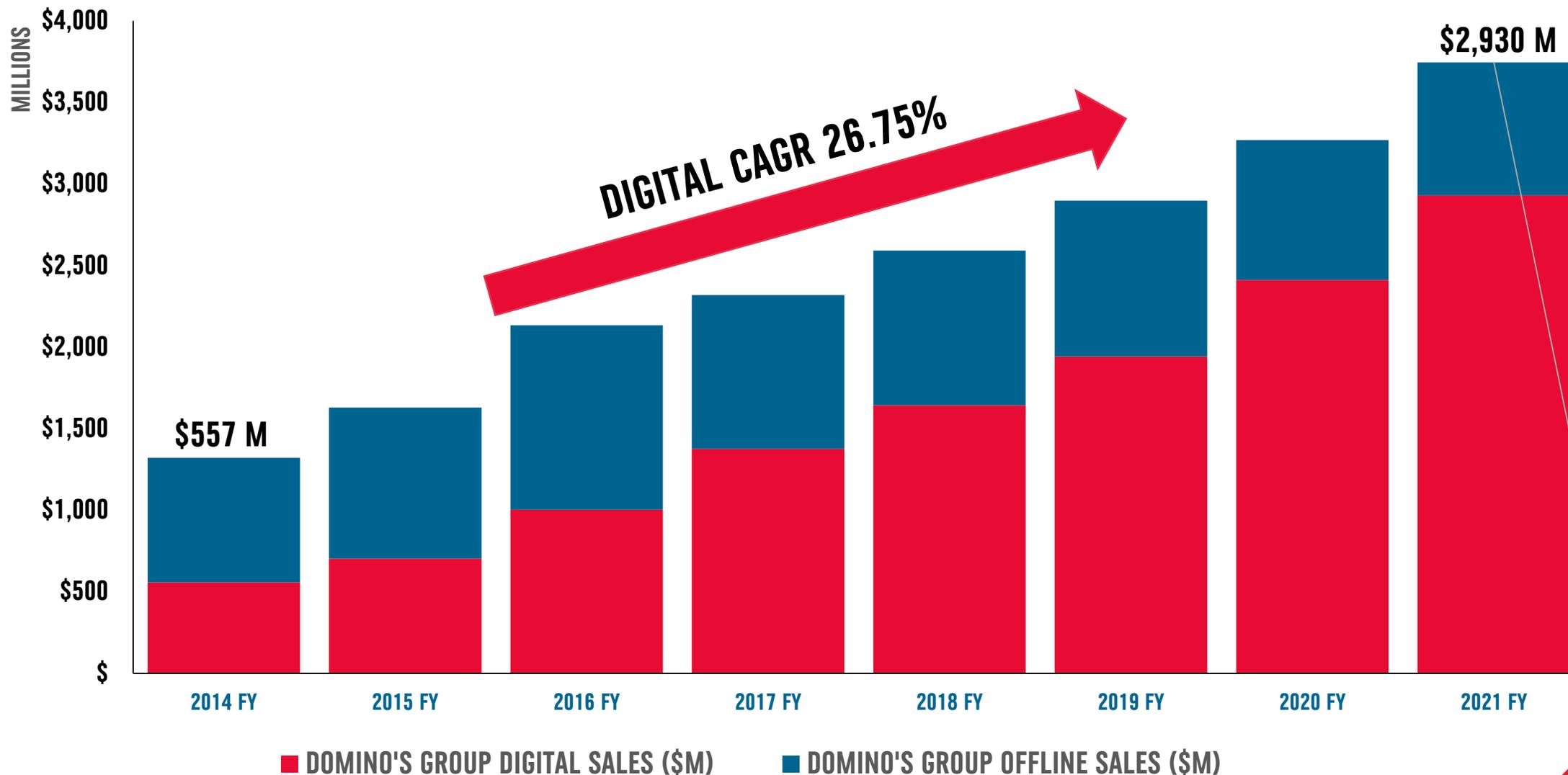


# THE AGE OF DELIVERY

**“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 - 2005**



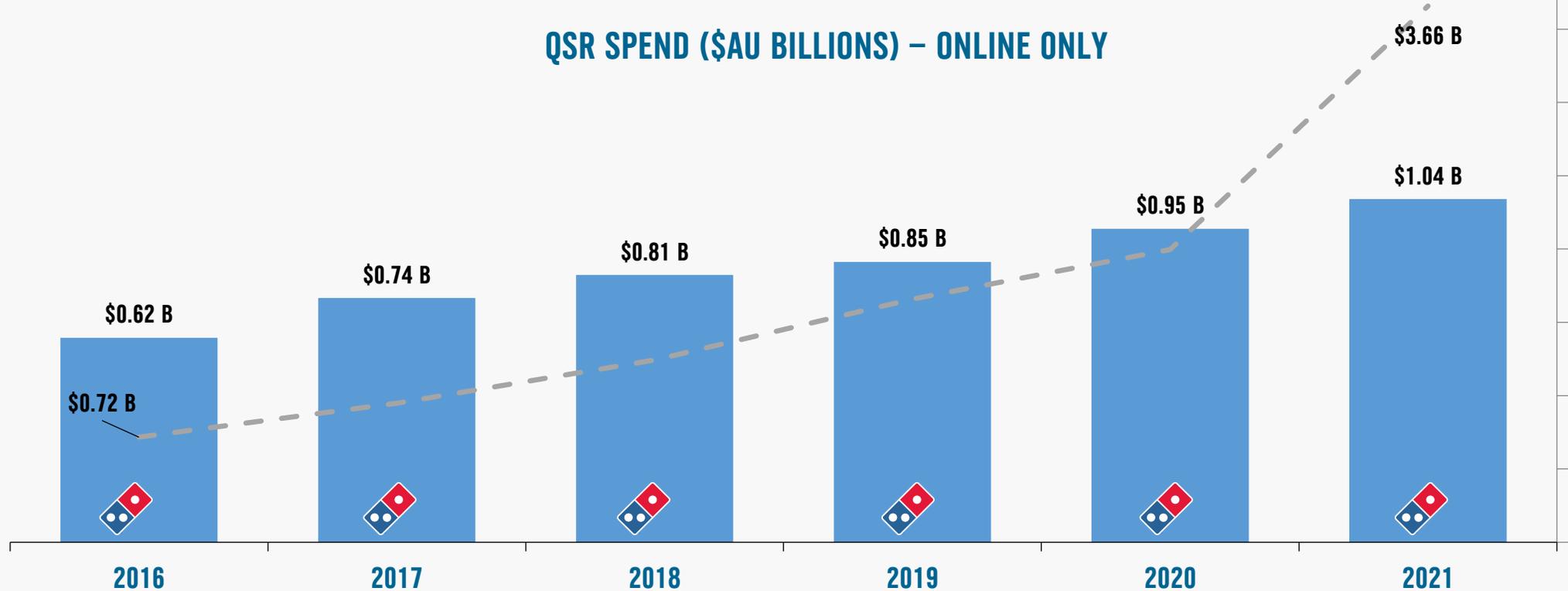
# THE ENGINE OF OUR GROWTH HAS BEEN DIGITAL



Including sales via aggregator platforms

# THE AGE OF DELIVERY

THE MOVE TO ONLINE HAS GROWN THE ONLINE MARKET FOR TOTAL QSR

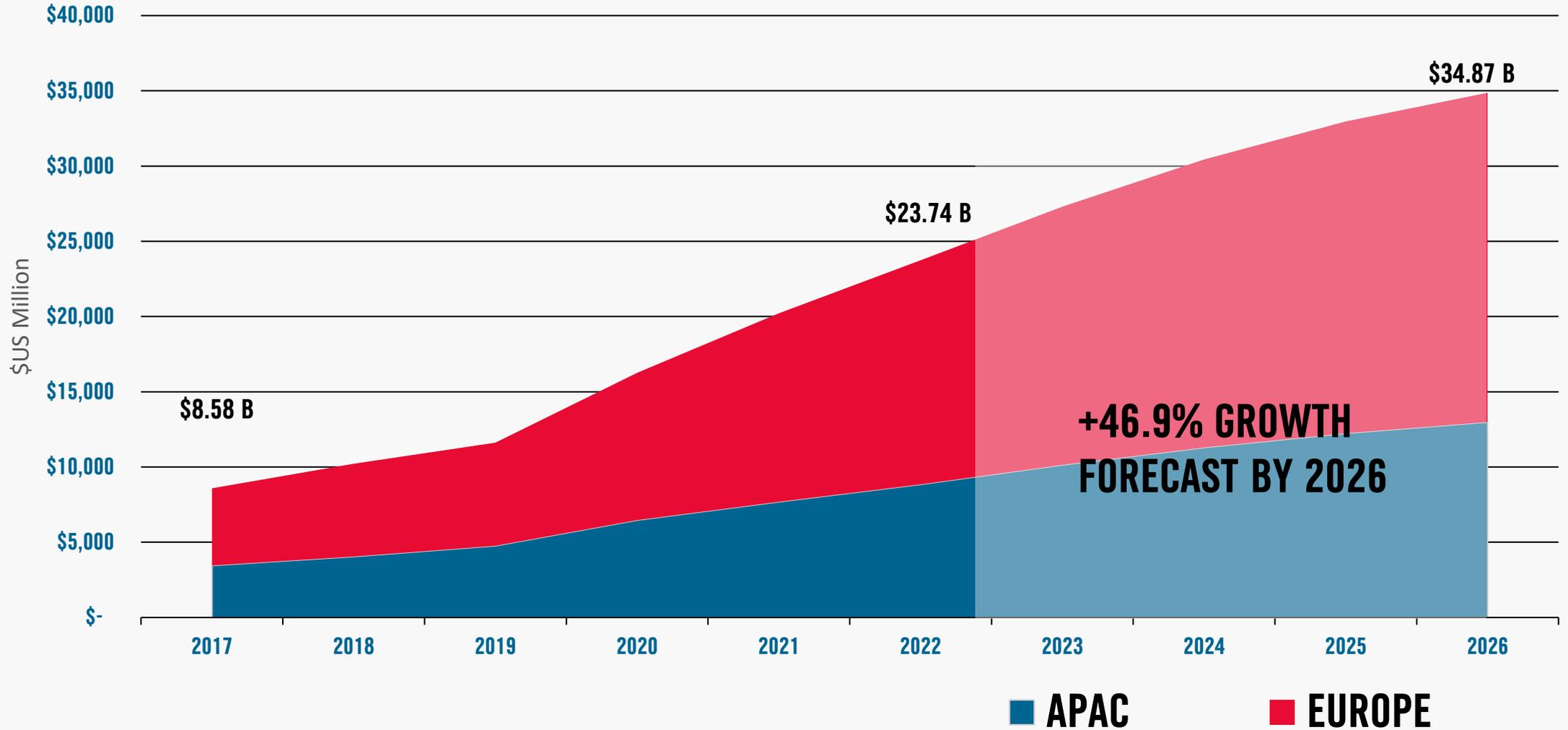


Source: The NPD Group/ CREST® Australia - Year End Mar 2022  
Digital sales figures for Domino's ANZ, by calendar year

DOMINO'S ANZ — TOTAL QSR DIGITAL - AU

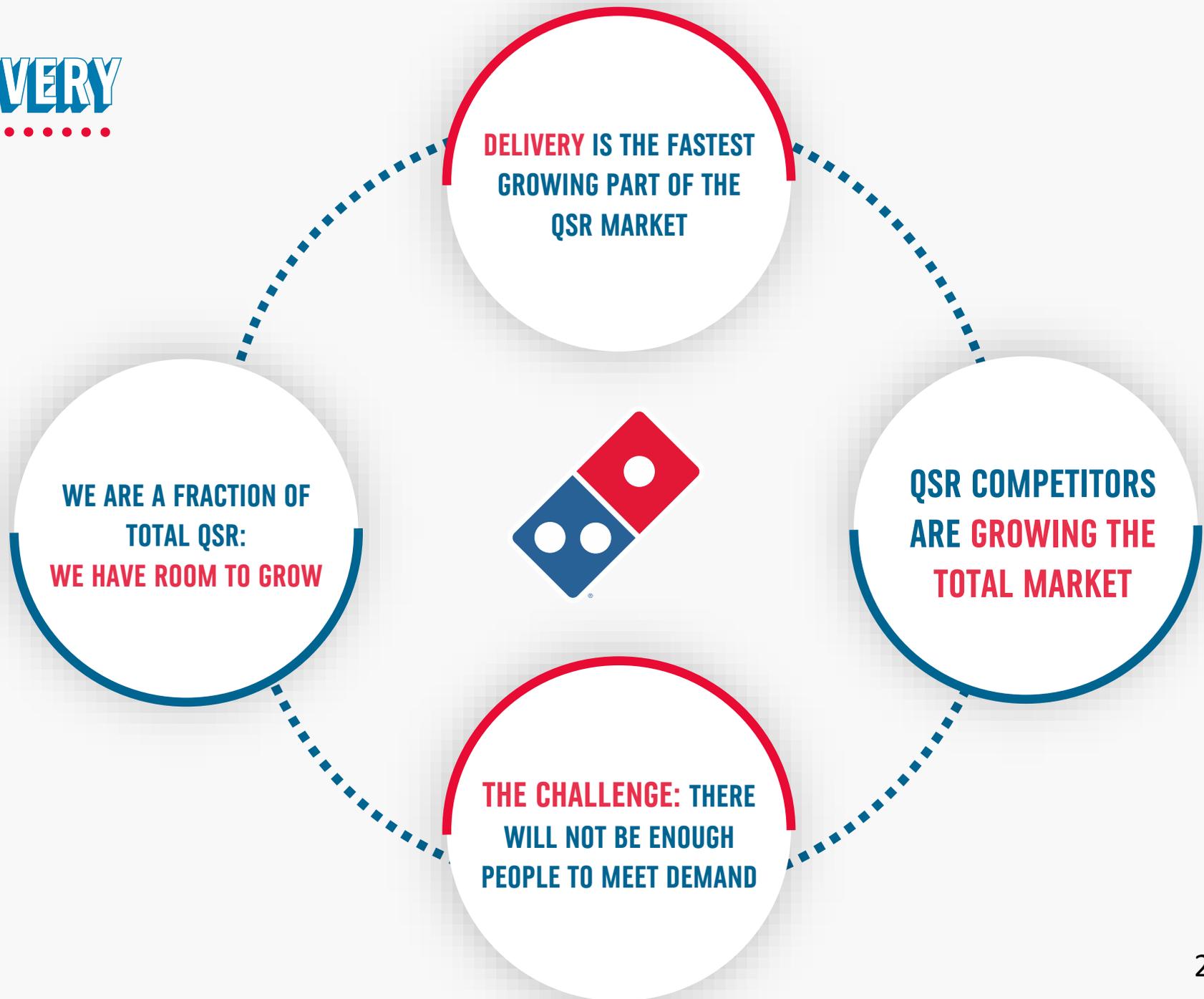
# THE AGE OF DELIVERY IS OUR FUTURE

## ONLINE FOOD DELIVERY – TOTAL MARKET



Statista: eServices - Online Food Delivery in DMP markets, \$US million (APAC excludes Taiwan)

# THE AGE OF DELIVERY



# THE AGE OF DELIVERY



WE FACE HISTORIC HEADWINDS, INCLUDING INFLATION, CONFLICT IN EUROPE, AND CURRENCY MOVEMENTS, BUT WE ARE FOCUSED ON THE LONG-TERM:



# A SUSTAINABLE QSR



**DOMINO'S CAN DELIVER**



**WE ARE A VALUE-BASED BUSINESS:**

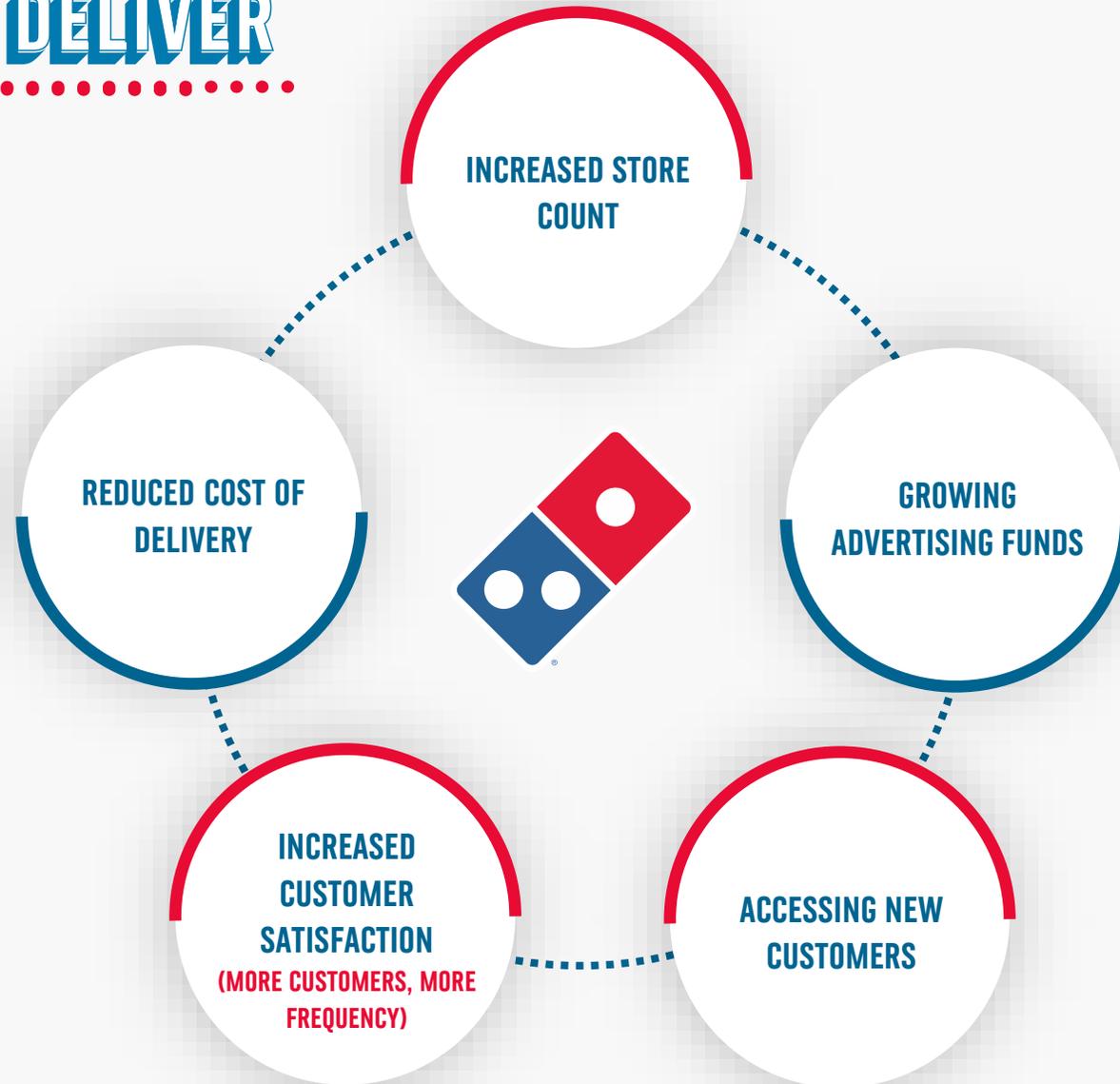
**PRODUCT+SERVICE+IMAGE**

**PRICE**

**= VALUE**



# DOMINO'S CAN DELIVER



# ADVERTISING FUNDS



**GROWTH OF NATIONAL  
ADVERTISING FUNDS**

**INCREASED  
TELEVISION**

**MORE FIREPOWER  
FOR ADVERTISING  
SPEND**

# COST OF DELIVERY

INCREASED LABOUR POOL

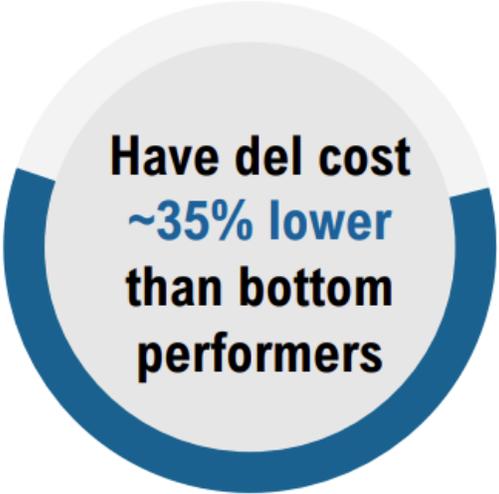
REDUCED RELIANCE ON  
CARS

SHORTER DELIVERY TIMES  
= LOWER COSTS



# COST OF DELIVERY

The top-performing (best 10%) delivery cost stores...



Have del cost  
~35% lower  
than bottom  
performers

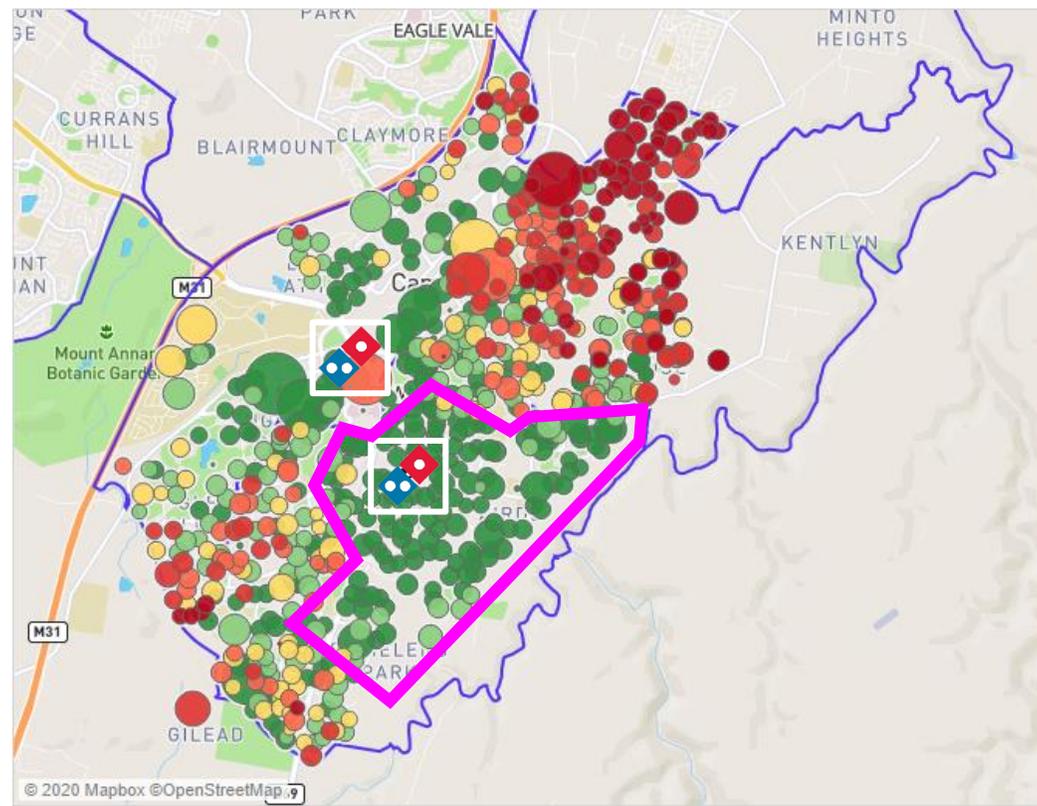
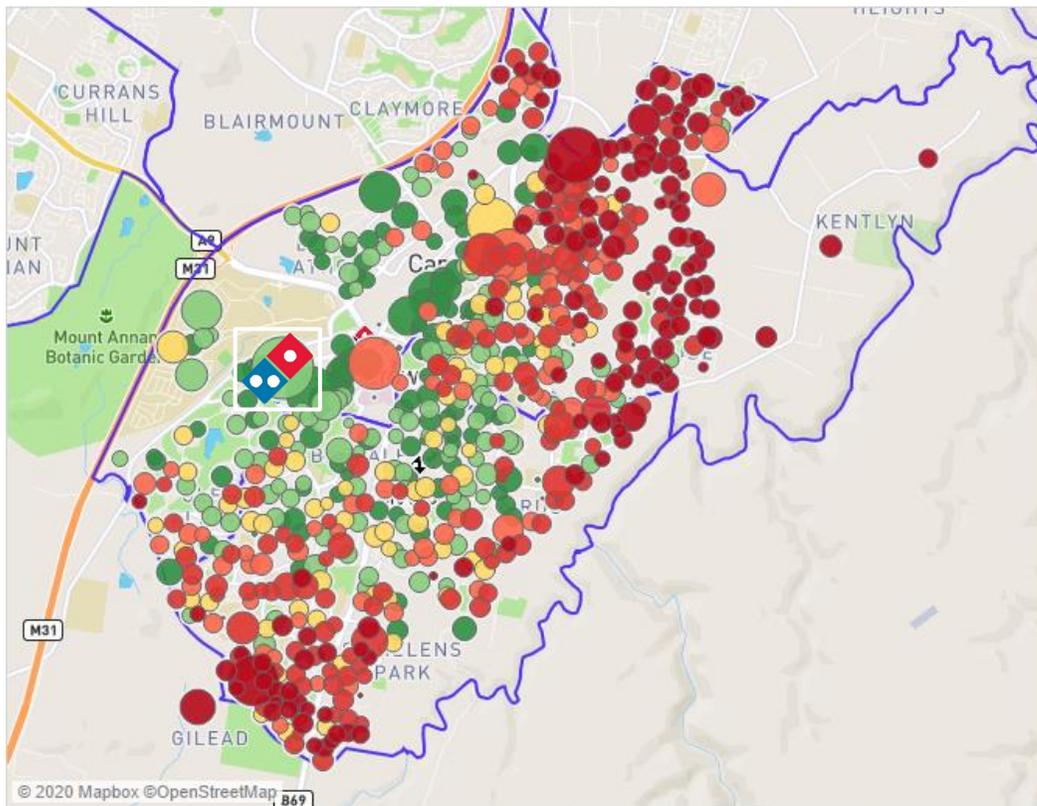


Have  
significantly  
shorter run  
times



Drive better  
service metrics  
& customer  
satisfaction

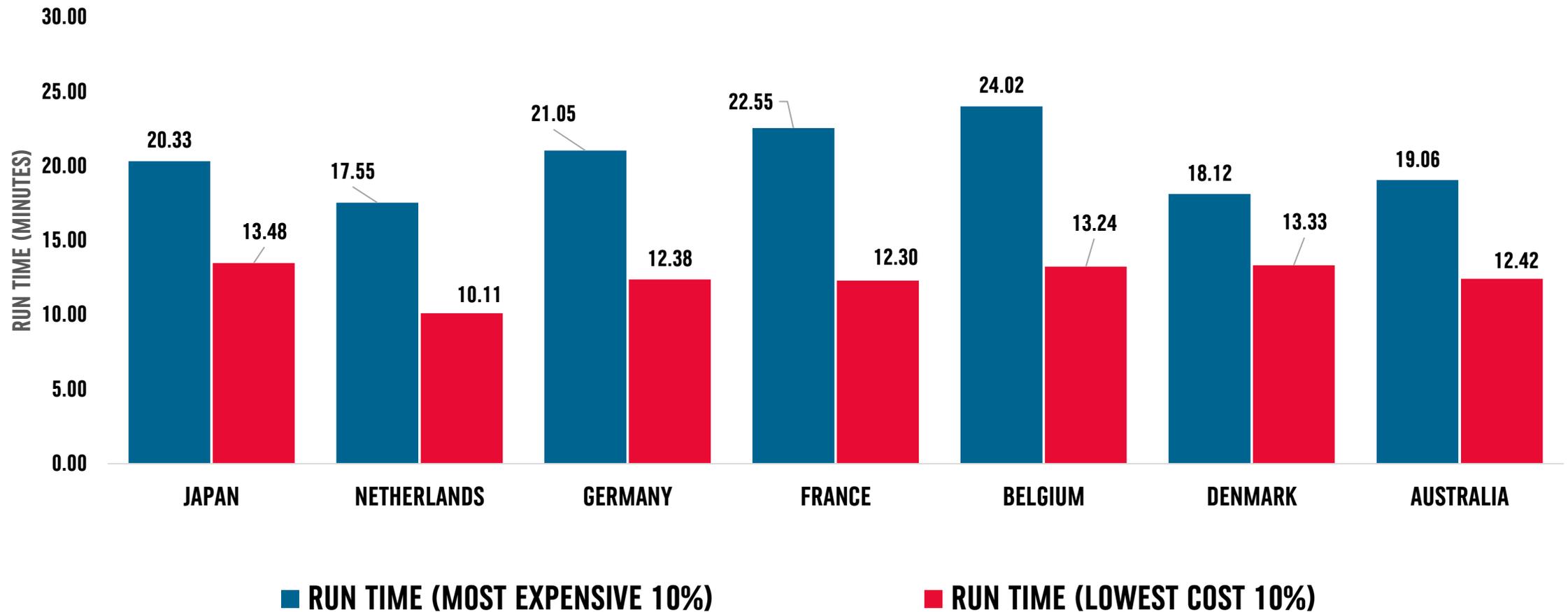
# SHORTER RUN TIMES = MORE PROFITABLE DELIVERIES



Fortressing example (Bradbury NSW) – provided Investor Day November 2020

# A 1/3 REDUCTION IN DELIVERY COST IS POSSIBLE IN EVERY MARKET

## AVERAGE RUNTIME (MINUTES): HIGHEST VS LOWEST DELIVERY COST STORES



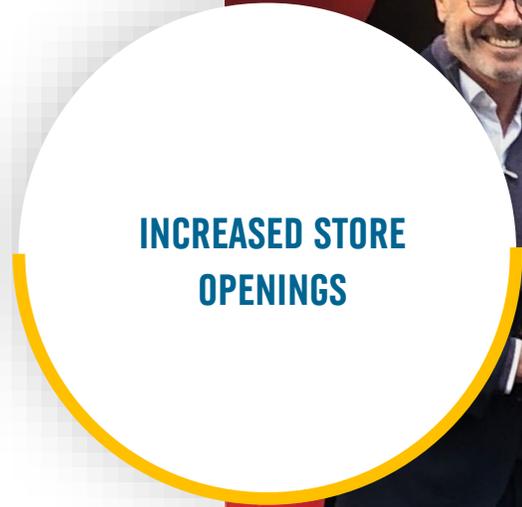
# UNIT ECONOMICS



+



=

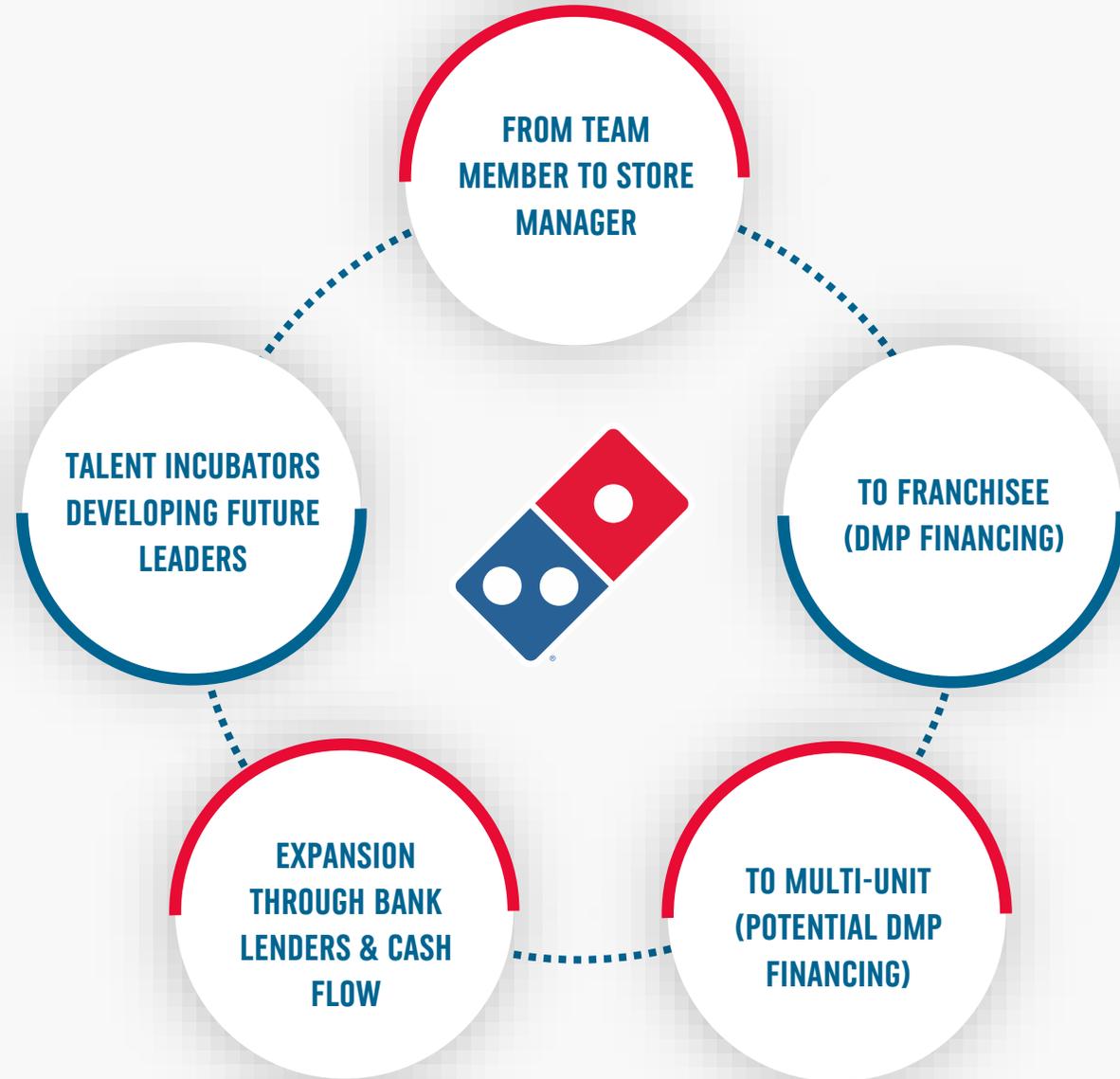


STORE PAYBACK TARGET  
**3 YEARS**



# DOMINO'S OFFERS AN UNRIVALLED PATHWAY

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**HEAR FROM THOSE DELIVERING ON  
OUR SUCCESS...**





# DOMINO'S PIZZA JAPAN INVESTOR PRESENTATION

JUNE 6TH, 2022

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

TAIWAN

**PRESENTED BY**

**JOSH KILIMNIK**

**CEO APAC**



# DOMINO'S PIZZA JAPAN MANAGEMENT TEAM



**JOSH KILIMNIK**  
**APAC CEO**

joined Domino's in Australia in 1992. He worked in various operational roles including Customer Service, Delivery Driver, Pizza Maker and Store Manager.



**BENJAMIN OSBORNE**  
**JAPAN COO**

began his Domino's journey at Domino's Lavington as a Delivery driver. In 2007 he moved to Geelong for university and held various roles including Store Manager, Regional Manager and OER Coach.



**ERIC YUTAKA TAI**  
**JAPAN CFO**

Joined DPJ in 2016. Along with his responsibilities as Chief Financial Officer, his responsibility spans to Legal.



**TONY SAI**  
**JAPAN CIO**

joined the Domino's Japan team in July 2019 as Chief Information Officer, bringing more than 20 years' experience in IT leadership, solution development, IT operations and partner and client management to the role.



**TODD REILLY**  
**APAC CMO**

started his Domino's career in Australia in 2002. He joined the Domino's Newmarket team in Brisbane as a delivery driver and shift runner while studying a Bachelor of Business, majoring in Marketing. After completing his degree, he moved into the corporate side of the business joining the Australian marketing team in 2005.



**HIROSHI KAKIUCHI**  
**JAPAN CORPORATE OPS**

2018 marked Hiroshi's 30th year at Domino's Pizza Japan. Since 1988, he worked his way up from Store Manager, Area Supervisor, and Regional Director, prior to being appointed as Head of Corporate Store Operations.



**SHIN SASAKI**  
**JAPAN DEVELOPMENT**

joined Domino's Pizza Japan in 1988, where he worked as a Store Manager, Area Supervisor, and Regional Director. He has experience in various roles within the system development, franchise development, corporate planning, procurement and physical logistics, and store development, prior to being appointed as Executive Vice President in 2017.



**MASARU FUKAZAWA**  
**JAPAN SCM & PROCUREMENT**

joined Domino's Pizza Japan, Inc. as the Director of Supply Chain Management in 2018. As a member of the Domino's Leadership Team, he focused on optimising the entire Domino's supply chain (procurement, logistics and quality assurance), and was appointed as Executive Vice President for Supply Chain and Procurement in July 2020.

# JAPAN



TOTAL STORES

**919**



NEW STORES OPENED

**119**



# WE ARE DELIVERING

## AGENDA

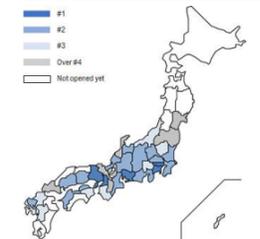
- UPDATE ON 2017 STRATEGY (100% OWNERSHIP)
- THE 'REBASING' OF 2021
- OUR FUTURE

### How will we get there?

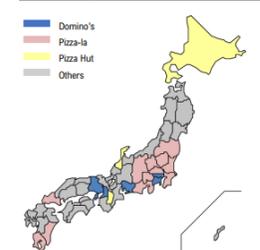
Domino's has new markets that have not yet been entered, or are under penetrated. DPJ will grow through:

- Opening new markets
- Opening kitchens closer to our customers
- Building on the customer insights, new menu offerings and new marketing approach outlined here
- Targeting more occasions
- Capitalising on the real estate opportunity available for new store builds
- Becoming an employer of choice for team members, including store managers
- Expanding our franchisee base – developing new franchisees, and multi-unit franchisees

Domino's Market Position by Market



#1 Brand by Market

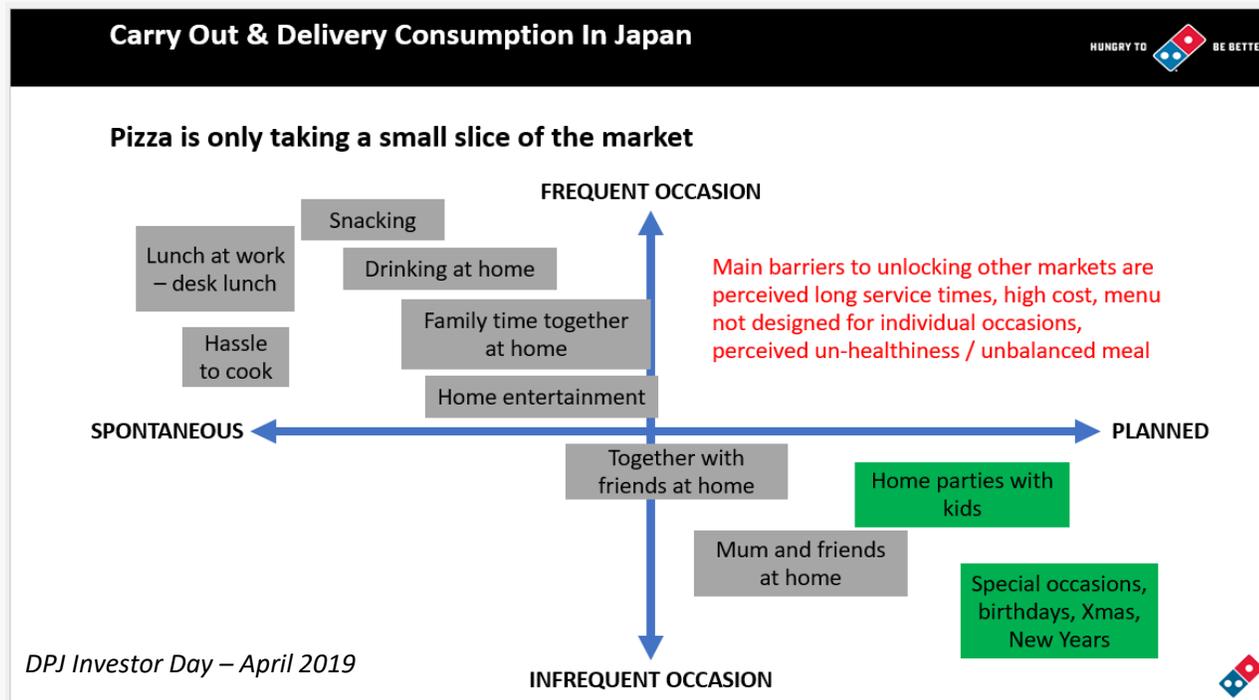


30 DPJ Investor Day – April 2019

# OUR STRATEGY IS DELIVERING - CUSTOMERS

✓ BUILDING ON CUSTOMER INSIGHTS, NEW MENU OFFERINGS AND NEW MARKETING APPROACH OUTLINED HERE

✓ TARGETING MORE OCCASIONS



# OUR STRATEGY IS DELIVERING - CUSTOMERS



DELIVERY AS YOU LIKE

HALF PRICE CARRYOUT

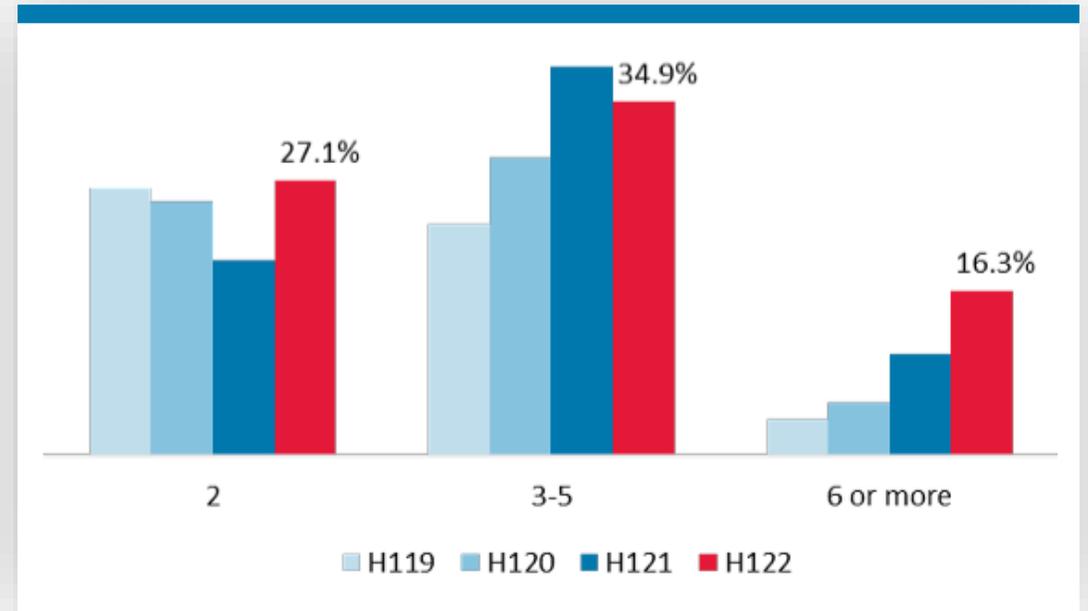
MENU OFFERINGS

FAMILY OCCASIONS

# OUR STRATEGY IS DELIVERING - TEAM

- ✓ CAPITALISING ON THE REAL ESTATE OPPORTUNITY AVAILABLE FOR NEW STORE BUILDS
- ✓ BECOMING AN EMPLOYER OF CHOICE FOR TEAM MEMBERS, INCLUDING STORE MANAGERS
- ✓ EXPANDING OUR FRANCHISEE BASE – DEVELOPING NEW FRANCHISEES, AND MULTI-UNIT FRANCHISEES

NUMBER OF STORES PER FRANCHISEE



115 → 133



2.2 → 3.9

Source: Company data: May 2022 vs H2 19

# OUR STRATEGY IS DELIVERING – EXPANSION



**OPENING NEW MARKETS**  
**+11 MARKETS (36 → 47)**

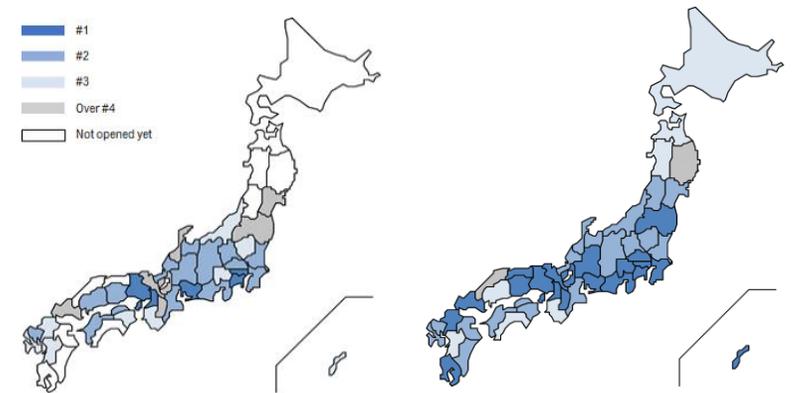


**OPENING KITCHENS CLOSER TO OUR CUSTOMERS**  
**PEOPLE PER STORE (Y207K → Y137K)**

## DOMINO'S MARKET POSITION BY MARKET

APR 19

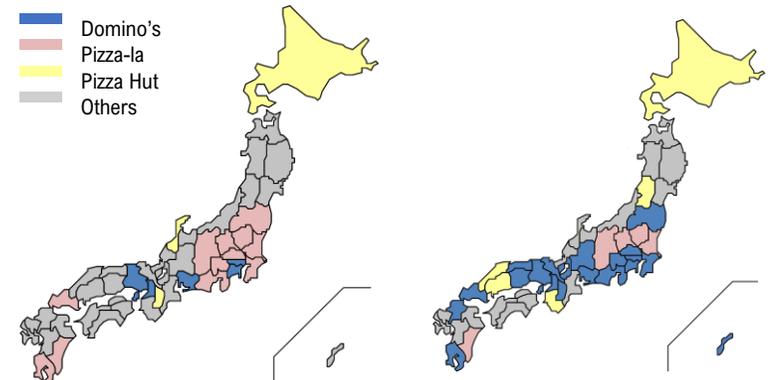
MAY 22



## #1 BRAND BY MARKET

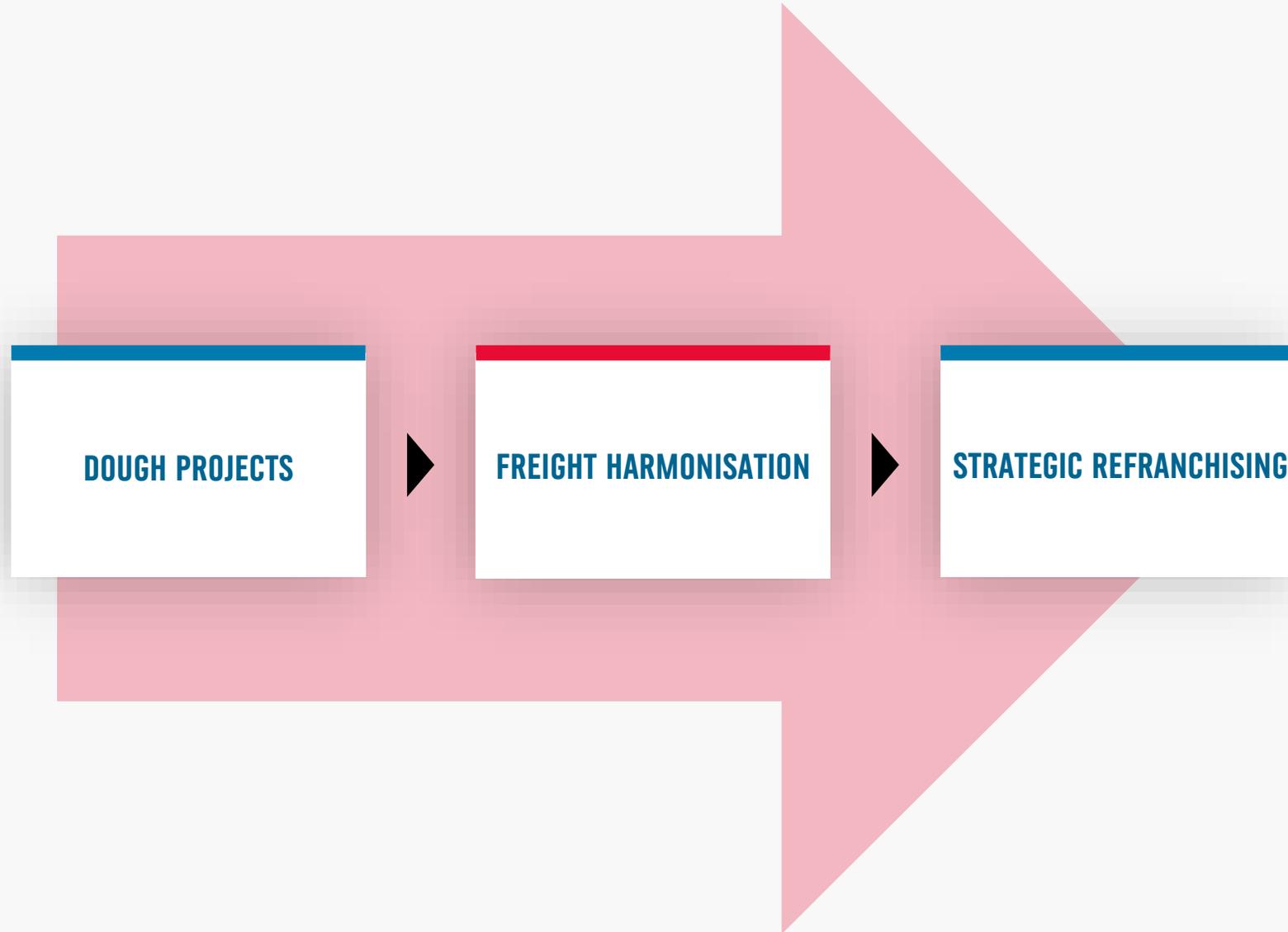
APR 19

MAY 22



# OUR STRATEGY IS DELIVERING – NATIONAL APPROACH

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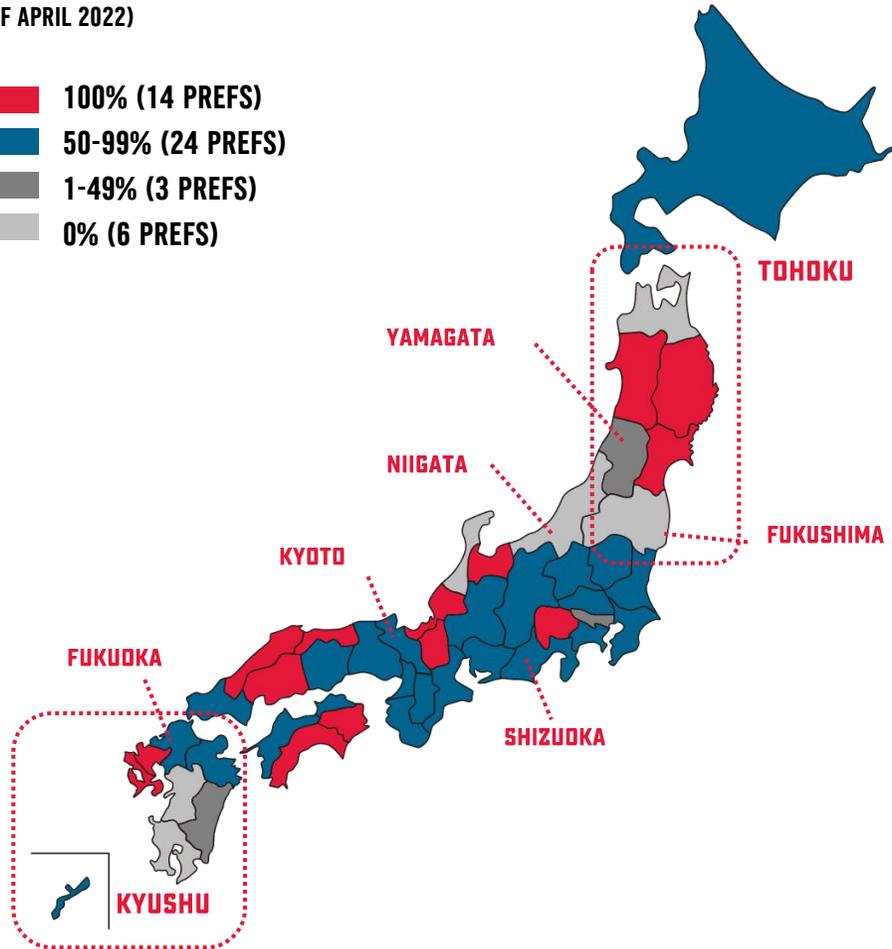


# OUR STRATEGY IS DELIVERING – NATIONAL APPROACH

## FRANCHISE STORE %

(AS OF APRIL 2022)

- 100% (14 PREFS)
- 50-99% (24 PREFS)
- 1-49% (3 PREFS)
- 0% (6 PREFS)



# THE "REBASING" - 2021

## FOLLOWING THE LIFTING OF THE 4TH STATE OF EMERGENCY

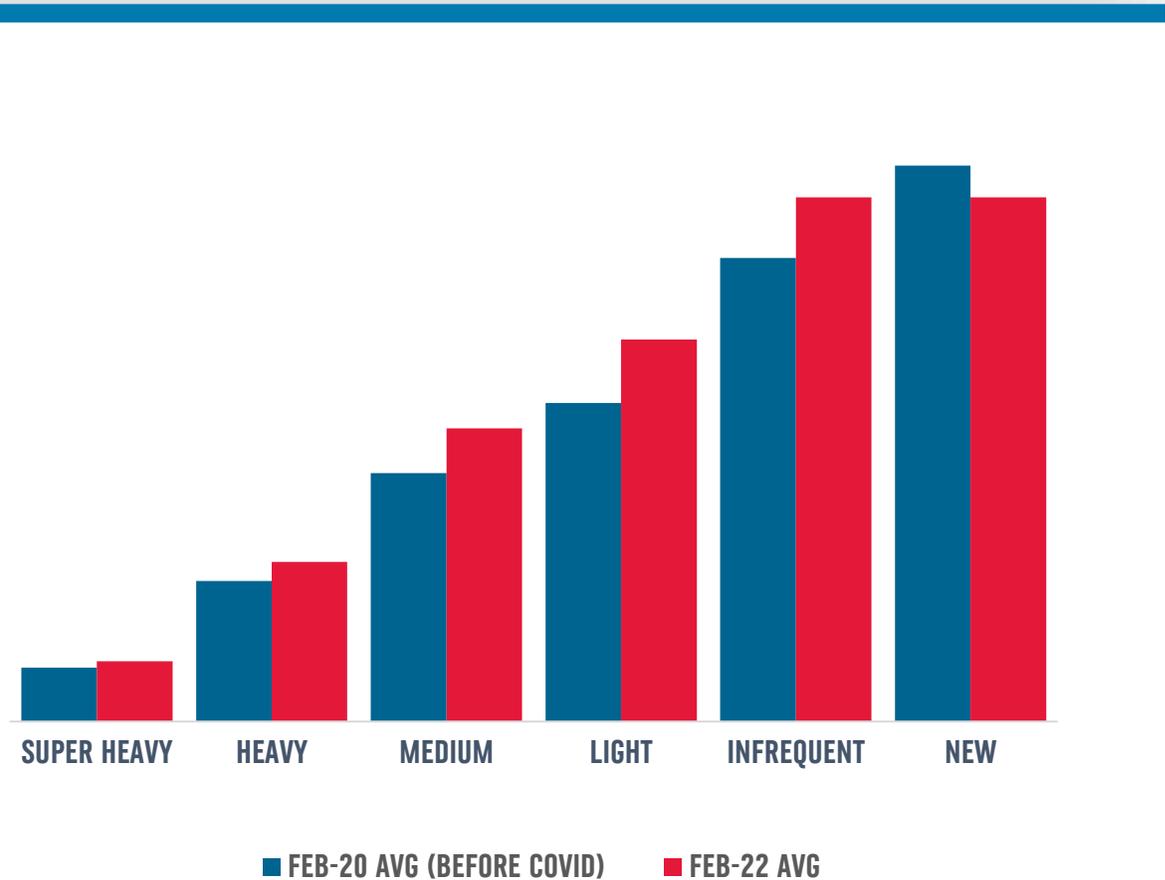
- WE LOST FREQUENCY OF THE SINGLE PERSON, SINGLE PIZZA OCCASION
  - OTHER OCCASIONS / CUSTOMER DEMOGRAPHICS DID NOT SEE THE SAME DECLINE
- MANAGEMENT ANTICIPATED A 'V-SHAPED' RECOVERY, BASED ON PREVIOUS TRENDS (INCL. EUROPE/ANZ)
- KEY COSTS – INCLUDING LABOUR AND MARKETING, WERE RETAINED AS A PERCENTAGE OF HIGHER SALES
- THIS DELIVERED SIGNIFICANT, SHORT-TERM MARGIN DETERIORATION IN CORPORATE STORES (UNTIL DECEMBER)

**THIS WAS A SUDDEN CHANGE – AND FREQUENCY HAS STABILISED**

# WE HAVE MORE, AND MORE FREQUENT, CUSTOMERS

- DESPITE THE REBASING, WE HAVE BUILT CUSTOMER LOYALTY AND FREQUENCY ACROSS OUR STORES
- AWARENESS AND LOYALTY HAS MOVED NEW CUSTOMERS UP OUR FREQUENCY RANGE
- THERE IS A LARGE OPPORTUNITY TO ATTRACT NEW CUSTOMERS AND GROW FREQUENCY ACROSS OUR BUSINESS

AVERAGE STORE CUSTOMERS – BY FREQUENCY



# “POST-COVID”: A MATERIALLY STRONGER BUSINESS

**AVERAGE WEEKLY  
CUSTOMERS/STORE  
>20% HIGHER**

**AVERAGE WEEKLY  
SALES/STORE  
>10% HIGHER**

**FRANCHISEE  
PROFIT/STORE  
>35% HIGHER**

**FRANCHISEE  
MARGINS/STORE:  
+60BPS**

Source: Company data for average weekly customers and sales – 12 months to March 2022, vs 12 months CY 2019.

Source: Franchisee profit/margins: franchisee submitted P&Ls over the same periods, as measured in stores with >12 months of operations as a franchised store

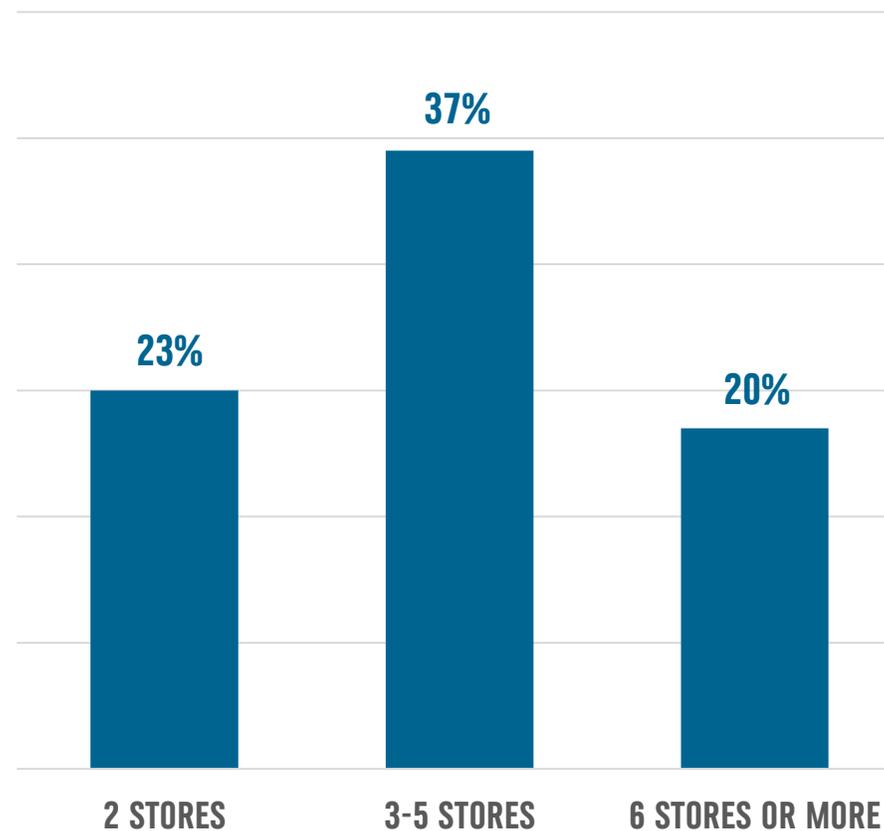
# WHERE ARE WE NOW? 12

## MARKET DASHBOARD

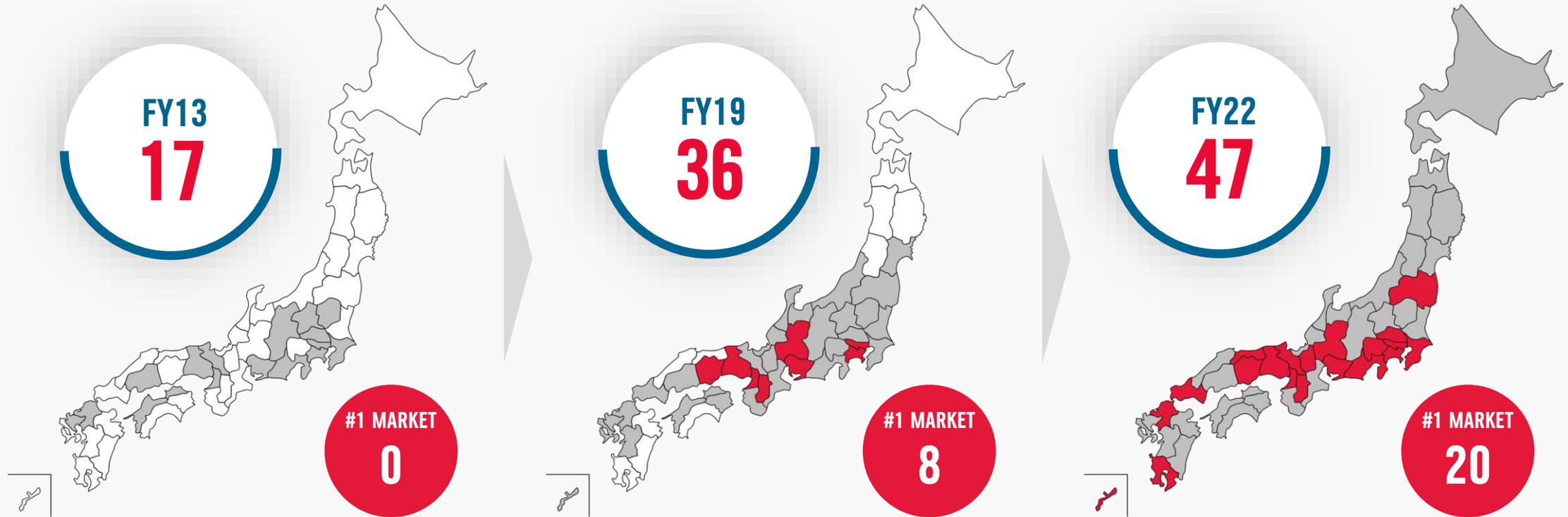
- TOTAL STORES 919 (JUNE-22)
- NUMBER OF SUB-FRANCHISEES: 133
- AVERAGE NUMBER OF STORES PER SUB-FRANCHISEE: 3.9
- POPULATION: ~125.5M
- PEOPLE PER STORE: ~137K

## DISTRIBUTION OF MULTI-UNIT SUB-FRANCHISEES

(% OF TOTAL SUB-FRANCHISEES)



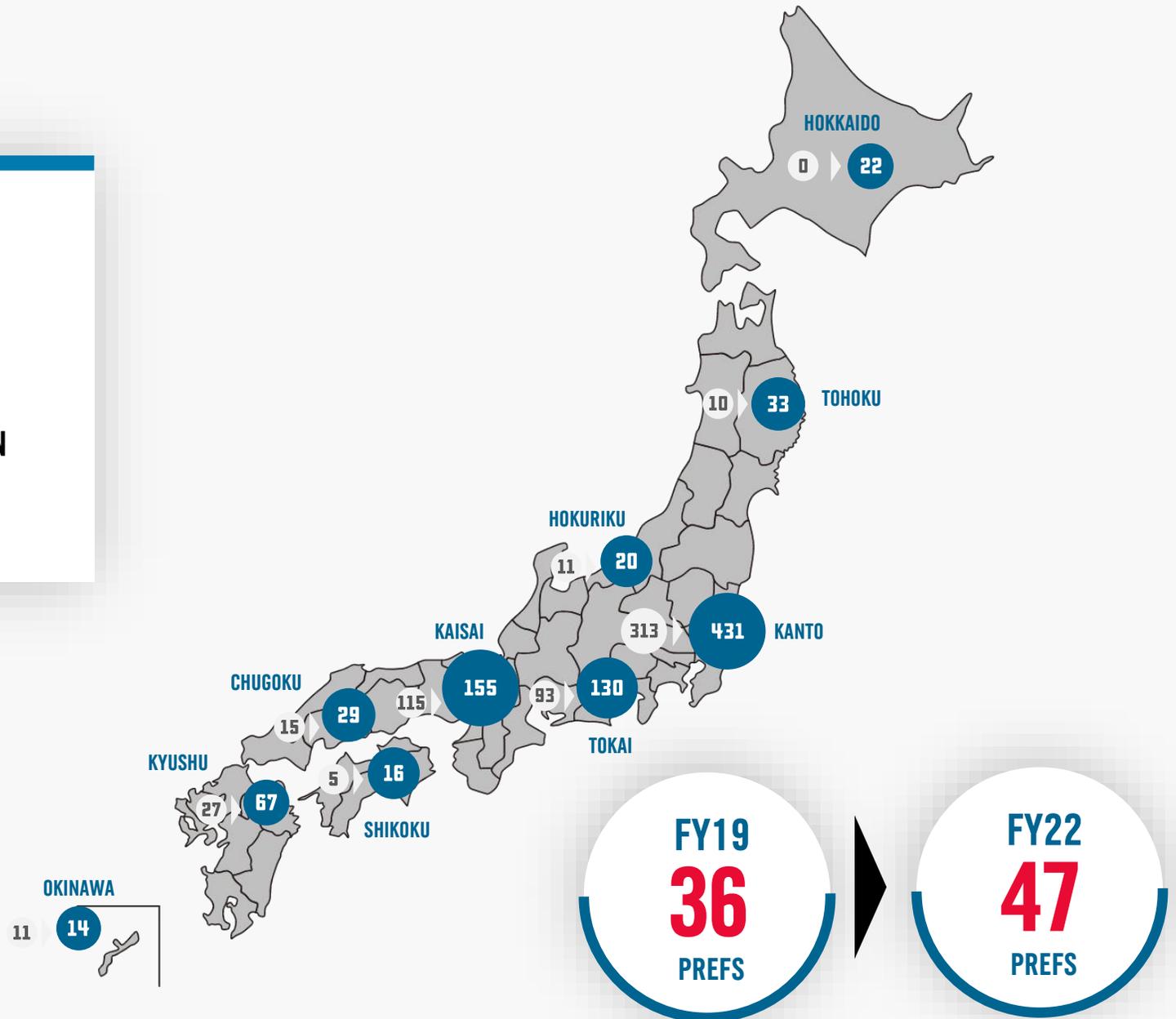
# #1 IN EVERY NEIGHBORHOOD



Domino's stores presence by prefecture

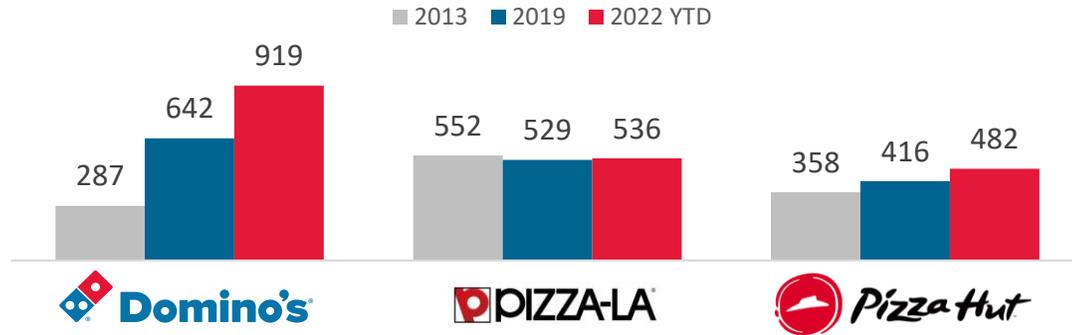
# STORE NETWORK

- DPJ IS NOW OPERATING IN ALL OF 47 PREFECTURES AFTER OPENING THE IZUMO STORE IN SHIMANE (DECEMBER)
- DOMINO'S MARKET POSITION IS #1 IN 20 OUT OF 47 PREFECTURES.

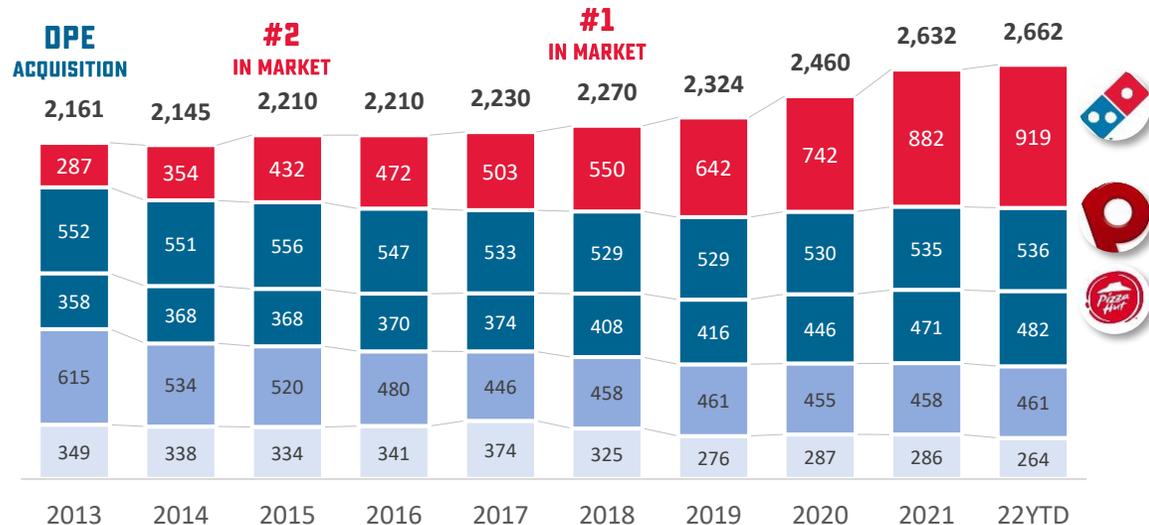


# DELIVERY PIZZA MARKET OVERVIEW IN JAPAN

## MAJOR 3 STORE COUNT



## CY CHANGES OF STORE COUNT OF JAPAN DELIVERY PIZZA INDUSTRY



Note: (1) As of May 2022, Source: Researched by Fuji Keizai Corp., Lokesuma, and company research

# A CLEAR PATH TO OUR FUTURE



**TARGETING #1  
IN EVERY  
NEIGHBOURHOOD**



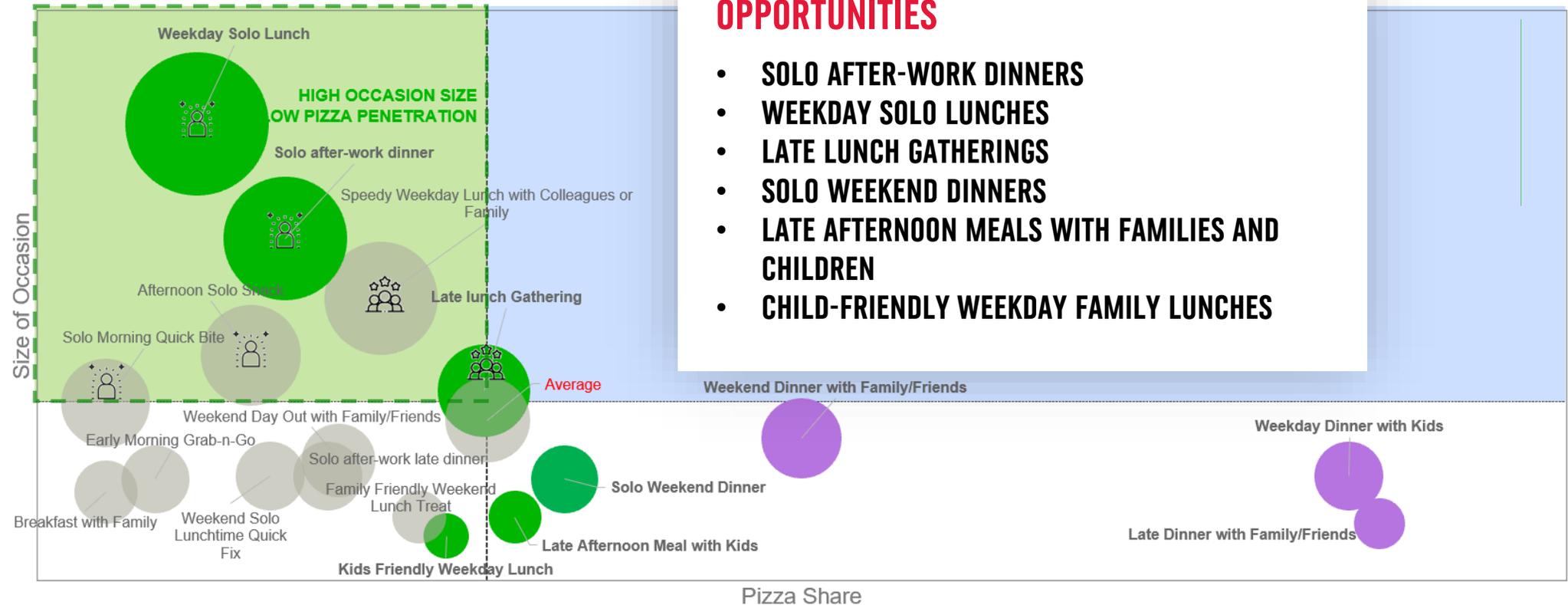
**BUILDING PROFITS  
THROUGH LOWER  
COST OF DELIVERY**



**REACHING MORE  
CUSTOMERS, ON  
MORE OCCASIONS**

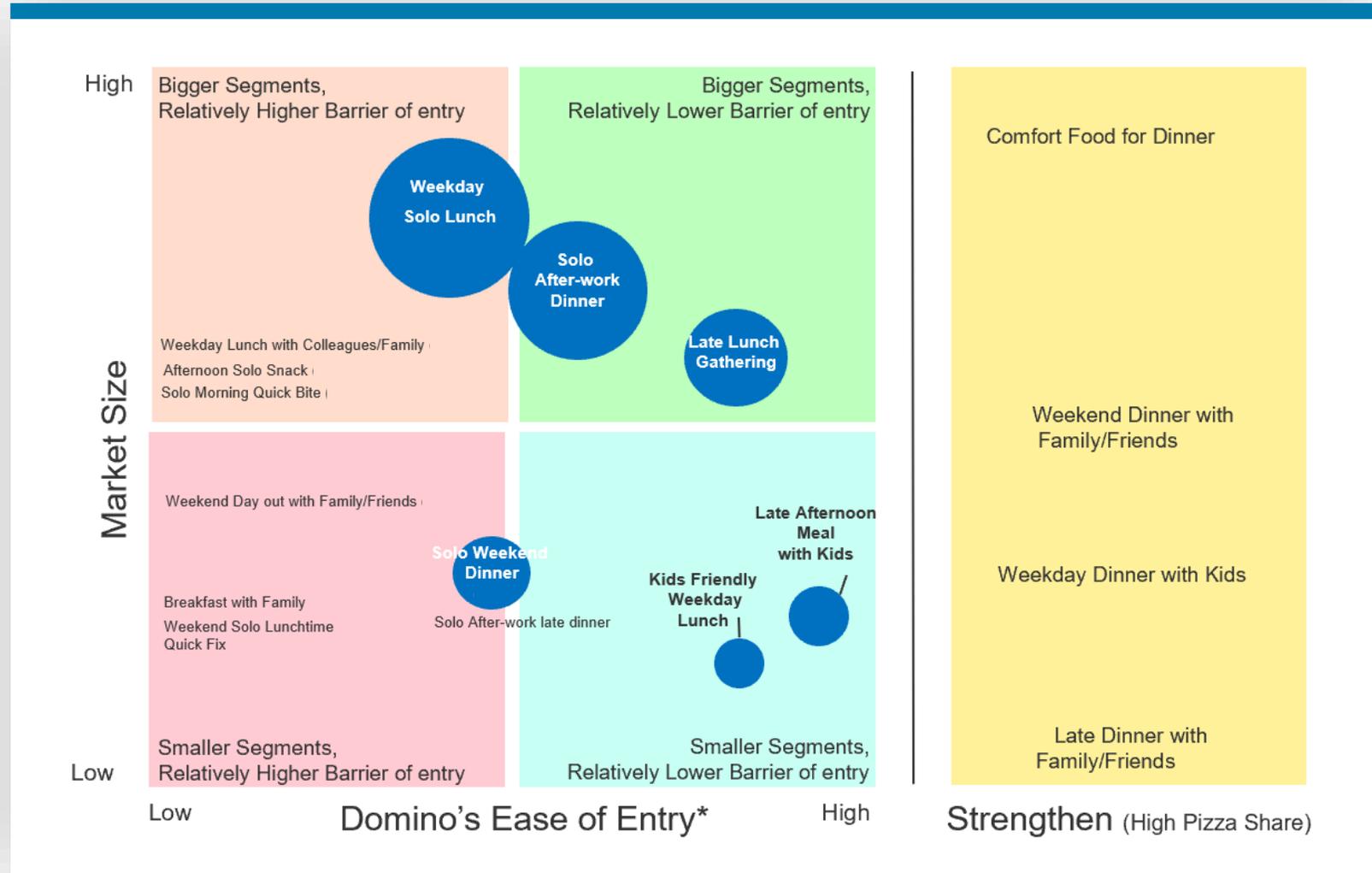
# OUR STRATEGY IS DELIVERING - CUSTOMERS

WE WILL FOCUS ON SEGMENTS WITH HIGH OCCASION SIZE, BUT LOW PIZZA PENETRATION



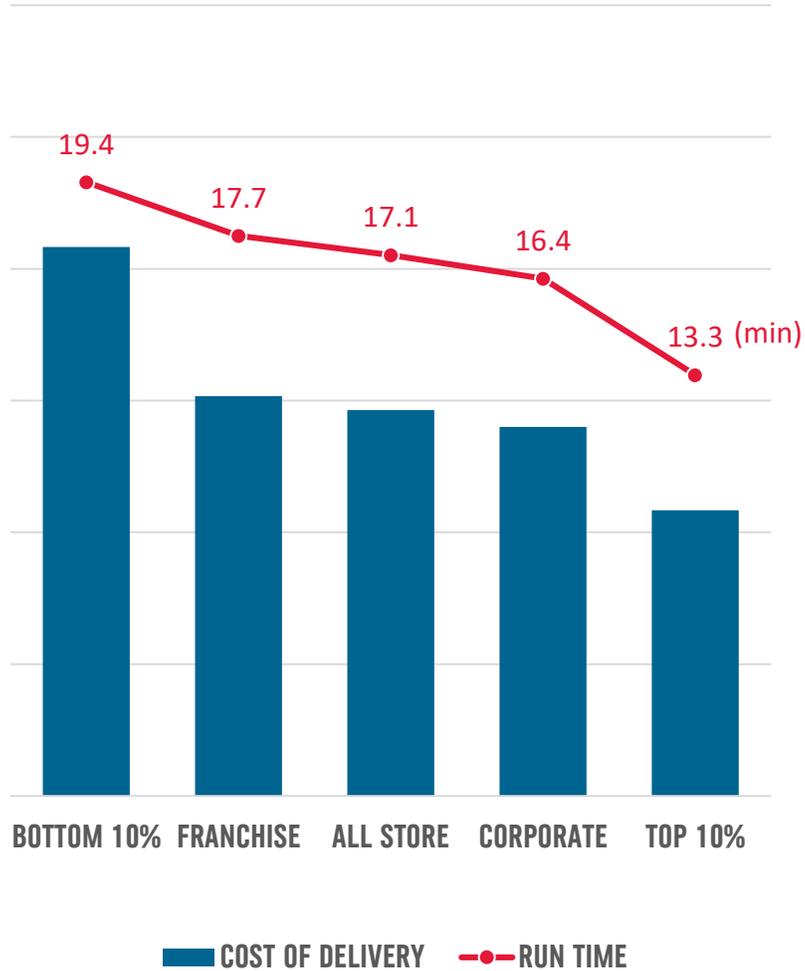
# OUR STRATEGY IS DELIVERING - CUSTOMERS

## WE WILL TARGET THE BARRIERS TO ENTRY



**PIZZA RICE BOWL AND NO MINIMUM DELIVERY INITIATIVES KEY TO MEETING CONSUMER NEEDS**

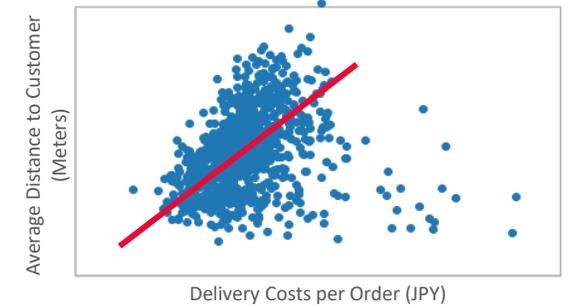
# COST OF DELIVERY: TIME (AND DISTANCE) = MONEY



JAPAN DELIVERY COST VS AVG RUNTIME

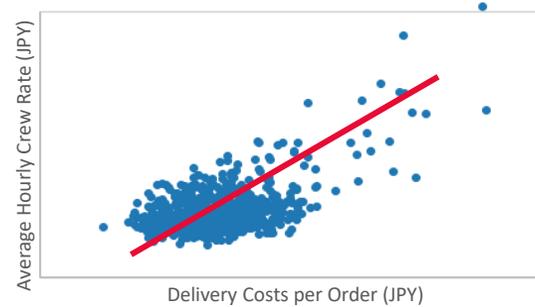


JAPAN DELIVERY COST VS AVG DELIVERY DISTANCE

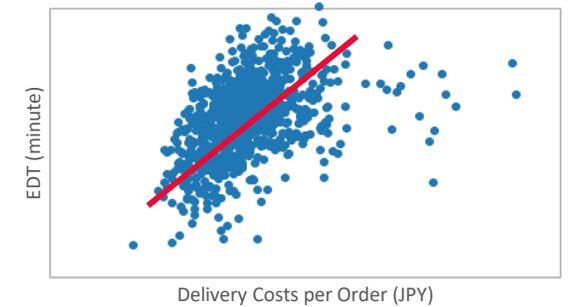


**DELIVERY COST IS HIGHLY CORRELATED TO DELIVERY DISTANCE AND TIME (ABOVE) COMPARED TO TOTAL DELIVERY TIME AND WAGES (BELOW)**

JAPAN DELIVERY COST VS AVG CREW RATE



JAPAN DELIVERY COST VS ESTIMATED DELIVERY TIME





## DOMINO'S JAPAN INTENDS TO DO OUR PART FOR DOMINO'S FOR GOOD

- **WE ARE LEADING THE DOMINO'S GROUP WITH 'FEED THE KNEAD'**
- **WE HAVE LAUNCHED INTERNAL EVENTS TO ENHANCE EMPLOYEE ENGAGEMENT WITH OUR 'BETTER SLICE FOR EVERYONE'.**
- **WE HAVE LAUNCHED OUR LOCAL HARVEST PROGRAM (SANCHOKU DOMINO'S)**
  - **"SANCHOKU DOMINO'S MARCHE", FARMER'S MARKET – FIVE STORES LAUNCHED**
  - **"SACHOKU DOMINO'S FOUNDATION" HAS BEEN ESTABLISHED IN APRIL.**

## DOING OUR PART



# LONG TERM OUTLOOK - JAPAN



CURRENT STORE COUNT

**919**

FUTURE STORE OUTLOOK

**2,000 (+117.6%)**



# DOMINO'S PIZZA TAIWAN INVESTOR PRESENTATION

JUNE 6TH, 2022

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

TAIWAN

**PRESENTED BY**  
.....

**MARTIN STEENKS**

**CEO TAIWAN**



# INDEX



- 1. 100% OWNERSHIP**
- 2. MARKET OVERVIEW**
- 3. WHERE WE ARE NOW**
- 4. OUR GOALS AND FUTURE PLANS**

# DOMINO'S PIZZA TAIWAN HISTORY

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- 1989** DOMINO'S TAIWAN OPENED ITS FIRST STORE
- 1999 MAY** COMMENCE FRANCHISE OPERATIONS
- 2007** OWNED BY THE FORMOSA INTERNATIONAL HOTELS CORPORATION
- 2021 SEPTEMBER** DPE ACQUIRED THE BUSINESS

- DOMINO'S PIZZA TAIWAN HAS GROWN TO BECOME THE #2 CHAIN BY STORE COUNT AND NETWORK SALES
- NETWORK IS PREDOMINANTLY FRANCHISED (~90%), OPERATED BY 34 SUB-FRANCHISEES OF WHOM 23 ARE MULTI-UNIT FRANCHISEES
- TWO COMMISSARIES/WAREHOUSES LOCATED NEAR NEW TAIPEI AND IN TAICHUNG
- APPROXIMATELY 100 EMPLOYEES ACROSS HEAD OFFICE, CORPORATE STORE OPERATIONS AND COMMISSARY OPERATIONS

**DPE HAS A LONGER-TERM OUTLOOK OF 400 STORE FOOTPRINT AND LOCAL MARKET LEADERSHIP**

# DOMINO'S PIZZA TAIWAN UNDER 100% OWNERSHIP



**MARTIN STEENKS**  
CEO TAIWAN

25 years in Domino's

Experience in store operations and a successful franchisee in the Netherlands, in charge of franchisee development as Franchisee Operations Director before CEO Taiwan



**GARY WANG**  
GENERAL MANAGER

27 years in Domino's, in charge of store development



**JOYCE LEE**  
CFO

27 years in Domino's, in charge of financial and personnel



**THELMA HUANG**  
OPERATIONS DIRECTOR

24 years in Domino's, in charge of operations and franchisee development



**REBECCA CHAO**  
MARKETING DIRECTOR

20 years in Domino's, having store operation experience, in charge of marketing



**ERICA LU**  
PURCHASING MANAGER

12 years in Domino's, in charge of purchasing



**LEO HSU**  
COMMISSARY MANAGER

21 years in Domino's, having store operation experience, in charge of commissary



**LI-MEI JEN**  
IT MANAGER

23 years in Domino's, in charge of IT

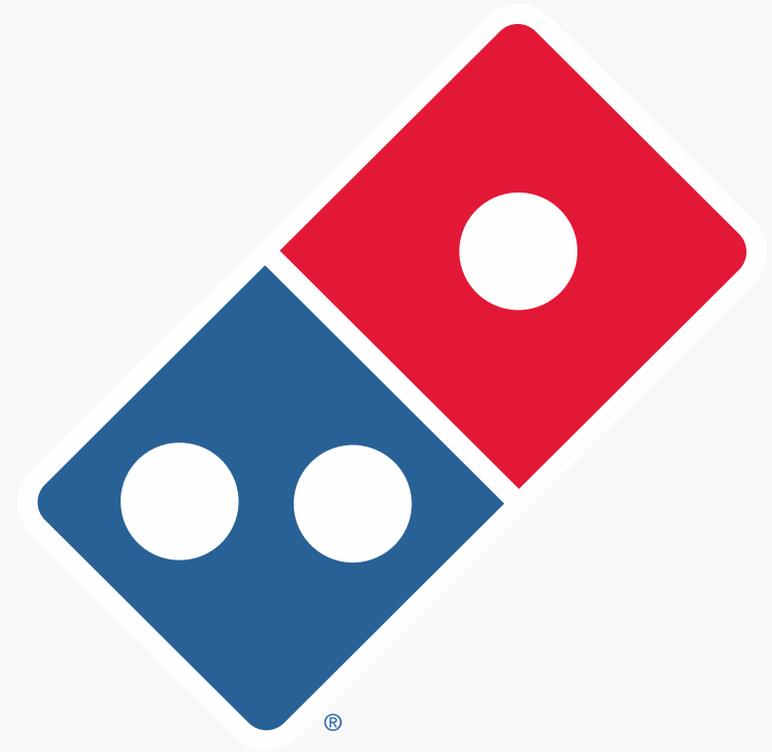


**VERA CHANG**  
QA/LABOR SAFETY MANAGER

7 years in Domino's, in charge of food and labor safety

# MARKET OVERVIEW

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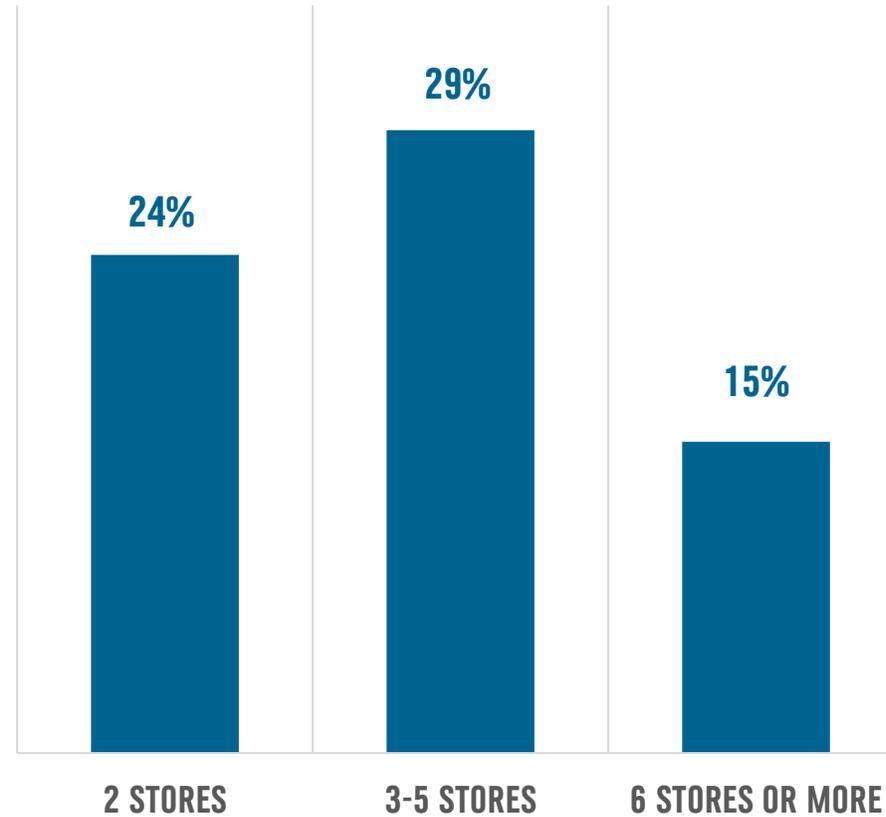
# WHERE ARE WE NOW?

## MARKET DASHBOARD

- TOTAL STORES 167 (MAY-22)
- NUMBER OF SUB-FRANCHISEES: 34
- AVERAGE NUMBER OF STORES PER SUB-FRANCHISEE: 4.4
- POPULATION: ~23.2M
- PEOPLE PER STORE: ~ 139K

## DISTRIBUTION OF MULTI-UNIT SUB-FRANCHISEES

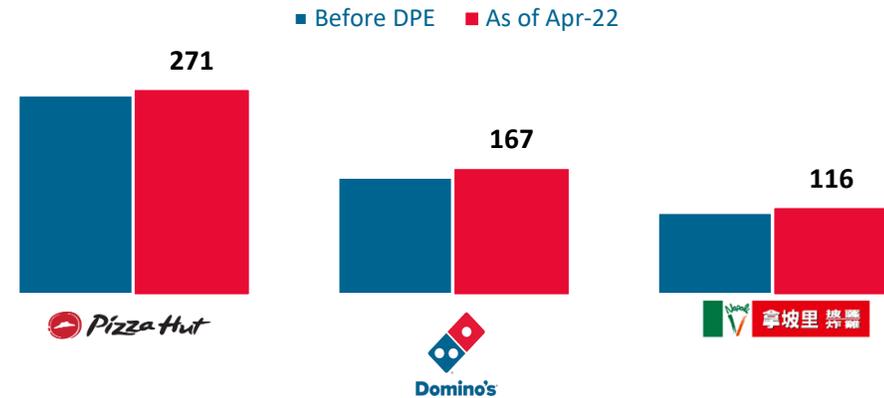
(#, % OF TOTAL SUB-FRANCHISEES)



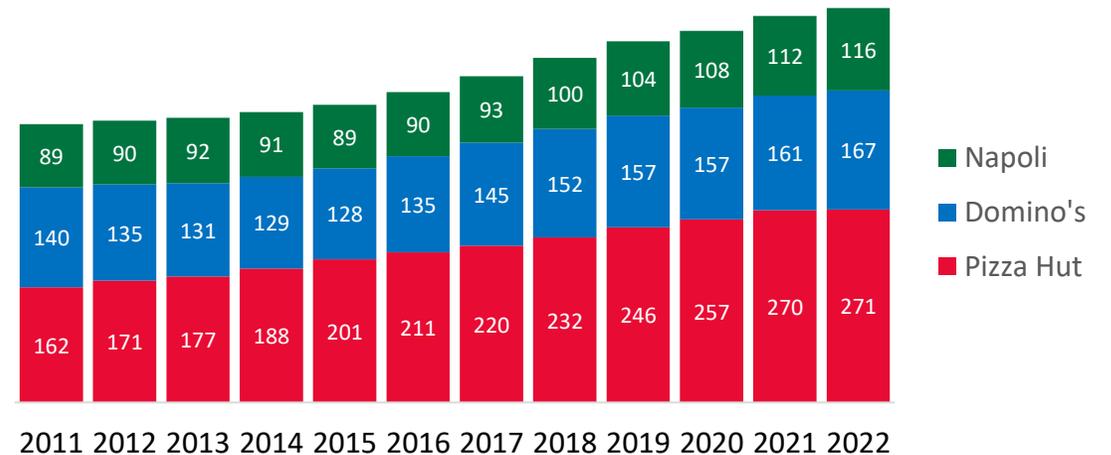
# MARKET OVERVIEW

- DOMINO'S PIZZA TAIWAN HAS GROWN SALES BY TAKING MARKET SHARE WITHIN THE PIZZA CATEGORY AS WELL AS INNOVATIONS ON MARKETING AND MENU TO MEET CUSTOMER'S NICHE
- DOMINO'S EXPANSION PLANS WILL TAKE A GREATER SHARE OF THE EXISTING PIZZA CATEGORY
- THE COMPANY WILL ALSO GROW THROUGH TAKING SHARE FROM OTHER QSR CATEGORIES IN CARRY-OUT AND DELIVERY

## NUMBER OF CHAIN STORES (2)



## CY CHANGES OF STORE COUNT OF DELIVERY PIZZA INDUSTRY

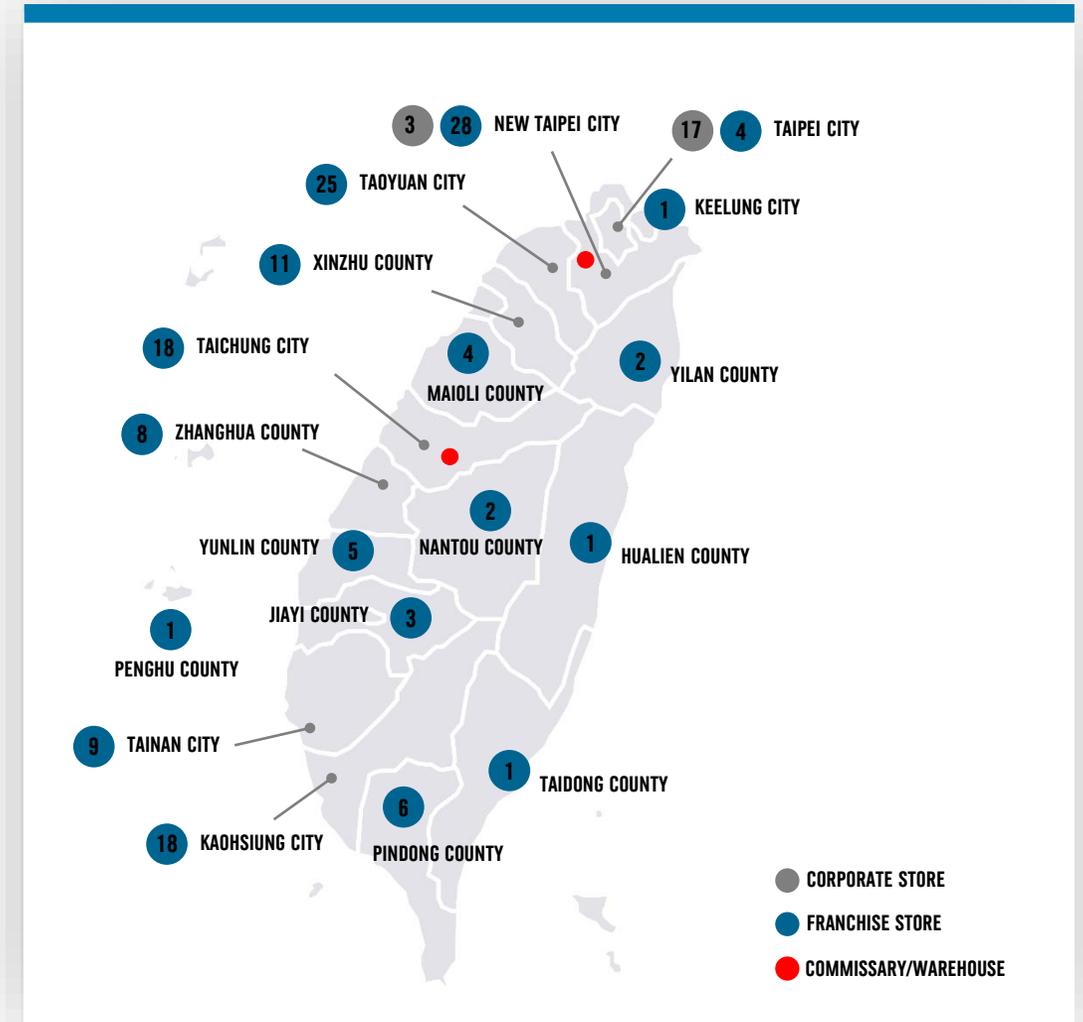


(1) SOURCE FROM DEPARTMENT OF STATISTICS [HTTPS://WWW.MOEA.GOV.TW/MNS/DOS\\_E/BULLETIN/BULLETIN\\_EN.ASPX?KIND=15&HTML=1&MENU\\_ID=6745&BULL\\_ID=9775](https://www.moea.gov.tw/mns/dos_e/bulletin/bulletin_en.aspx?kind=15&html=1&menu_id=6745&bull_id=9775)  
 (2) COMPANY STUDY

# STORE NETWORK

- DOMINO'S TAIWAN HAS BUILT A STRONG STORE NETWORK WITH STORES LOCATED ACROSS ALL MAJOR CITIES
- MANAGEMENT INTENDS TO EXPAND THE STORE FOOTPRINT THROUGH OPENING MORE STORES, INTRODUCING NEW, INTERNAL, FRANCHISEES TO THE NETWORK, HELPING EXISTING FRANCHISEES PROFITABLY EXPAND THEIR BUSINESSES, AND INVESTING IN THE NETWORK AND OUR PEOPLE TO DRIVE LONG TERM GROWTH
- NETWORK OPERATIONS TO BE OPTIMIZED IMMEDIATELY BY LEVERAGING LOCAL EXPERTISE FROM TAIWAN IN MARKETING AND OPERATIONS

## STORE LOCATIONS



# OUR THREE YEAR PLAN



- **NEW STORE OPENINGS**
- **IN-FILL STORES IN CURRENT REGIONS (FORTRESSING STRATEGY)**
- **PLANNED STORE RELOCATIONS**
- **GROWING OUR FRANCHISEE BASE**
- **MARKETING AND MENU INNOVATIONS**
- **BRAND RELAUNCH**
- **LEVERAGE DPE'S DIGITAL EXPERTISE TO ACCELERATE CUSTOMER ENGAGEMENT AND SALES GROWTH**
- **ESG**

# WE'RE ALREADY DELIVERING

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- **NEW STORE OPENINGS**

- ✓ **11 STORES ALREADY ROLLED OUT SINCE ACQUISITION**



- **IN-FILL STORES IN CURRENT REGIONS**



- **PLANNED STORE RELOCATIONS**



- **GROWING OUR FRANCHISEE BASE**

- ✓ **PROGRAMS IN PLACE FOR NEW FRANCHISEE RECRUITING**



# WE'VE DELIVERED

✓ **MARKETING AND MENU INNOVATIONS**

✓ **BRAND RELAUNCH**

✓ **LEVERAGE DPE'S DIGITAL EXPERTISE  
TO ACCELERATE CUSTOMER  
ENGAGEMENT AND SALES GROWTH**

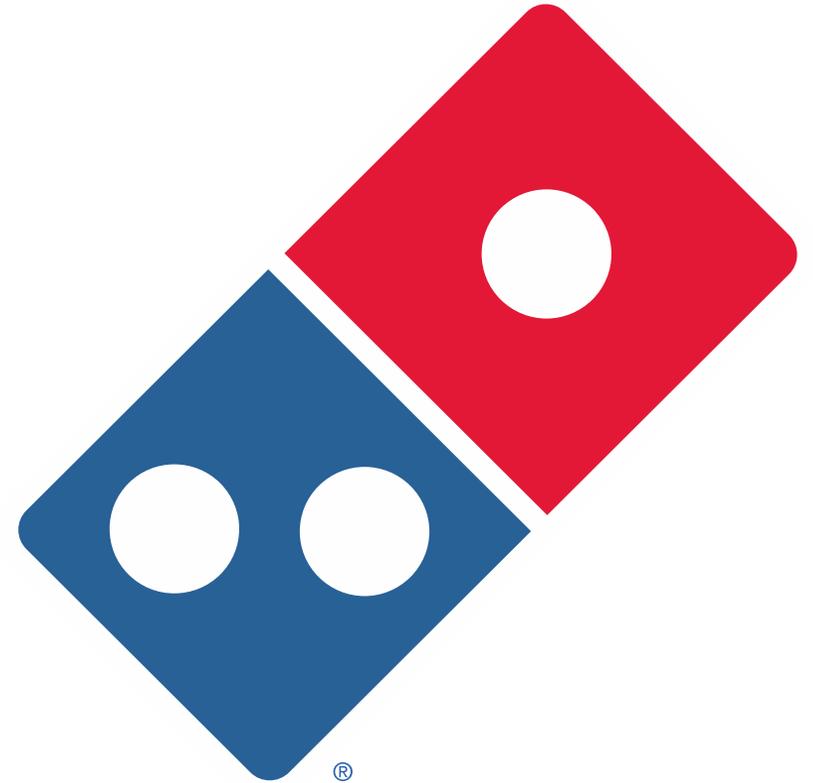
✓ **ESG**



# DUAL-TRACK PROGRAM TO GROW OUR FRANCHISEE BASE

INCENTIVES TO MOTIVATE  
FRANCHISEES TO GROW  
THEIR OWN MANAGER  
(FRANCHISEE)

PROJECT IGNITE  
(DPT INTERNAL)



# EXPERIENCED FRANCHISEES – READY FOR GROWTH



**GOLD FRANNY  
2021 WINNER**

SEE MORE AT [HTTPS://INVESTORS/DOMINOS.COM.AU/VIDEOS](https://investors.dominos.com.au/videos)

# A NEW APPROACH TO MARKETING

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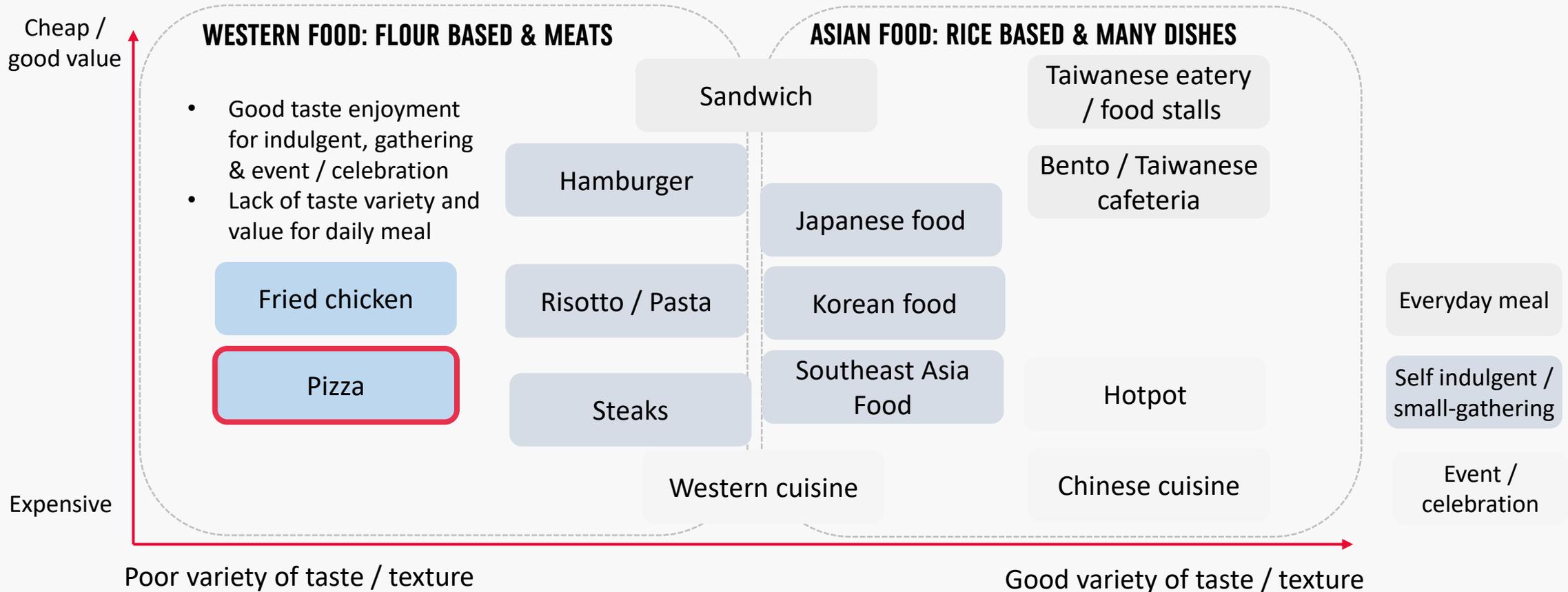
WE WILL REVOLUTIONISE



# CONSUMER INSIGHTS

## HOW CONSUMERS PERCEIVE PIZZA COMPARED TO OTHER FOOD?

The enjoyment of taste makes pizza good for indulgent or gathering events, but the taste variety and value make it distant to daily meal



Note: As of September 2021, Source: Researched by Kantar Taiwan

# REVOLUTIONISING OUR BRAND IMAGE



**安心** 在家吃 **外送費 0元**

外帶優惠除外

**北海道起司 海鮮盛宴比薩**

Sang 出到夠夠的份量

橙岩起司漢堡餅皮

拿坡里 壽星

活動日期: 2022/4/29-2022/6/6

慶祝生日送禮小食, 即買 (有餘壽星) 即送 (一張 隨單附送壽星卡) 送與家人親友

2個大披薩 + 6塊炸雞 + 6塊烤雞 + 2瓶1250ml 瓶裝飲料

外賣價 \$1198  
外賣價 \$1278

除咗咁, 唔知道嘅童話世界款

外帶小披薩 **99元起**

優惠日期: 2022.03/14-03/20

**比薩外帶 買大送大**

或外送買大送小

拿坡里 生日慶

大披薩 \$229

6塊炸雞 \$229

活動日期: 2022/3/10-2022/3/23

**全新達美樂 美味派新登場**

10人以上 3個比薩 + 1個拼盤

**\$1288起**

拿坡里 壽星 x SKIPPY

好運會發生

**杏運花生披薩**

活動日期: 2022/2/11-2022/10/10

# REVOLUTIONISING OUR PRODUCT

## A NEW DIVERSE PRODUCT OFFERING IN OUR MENU

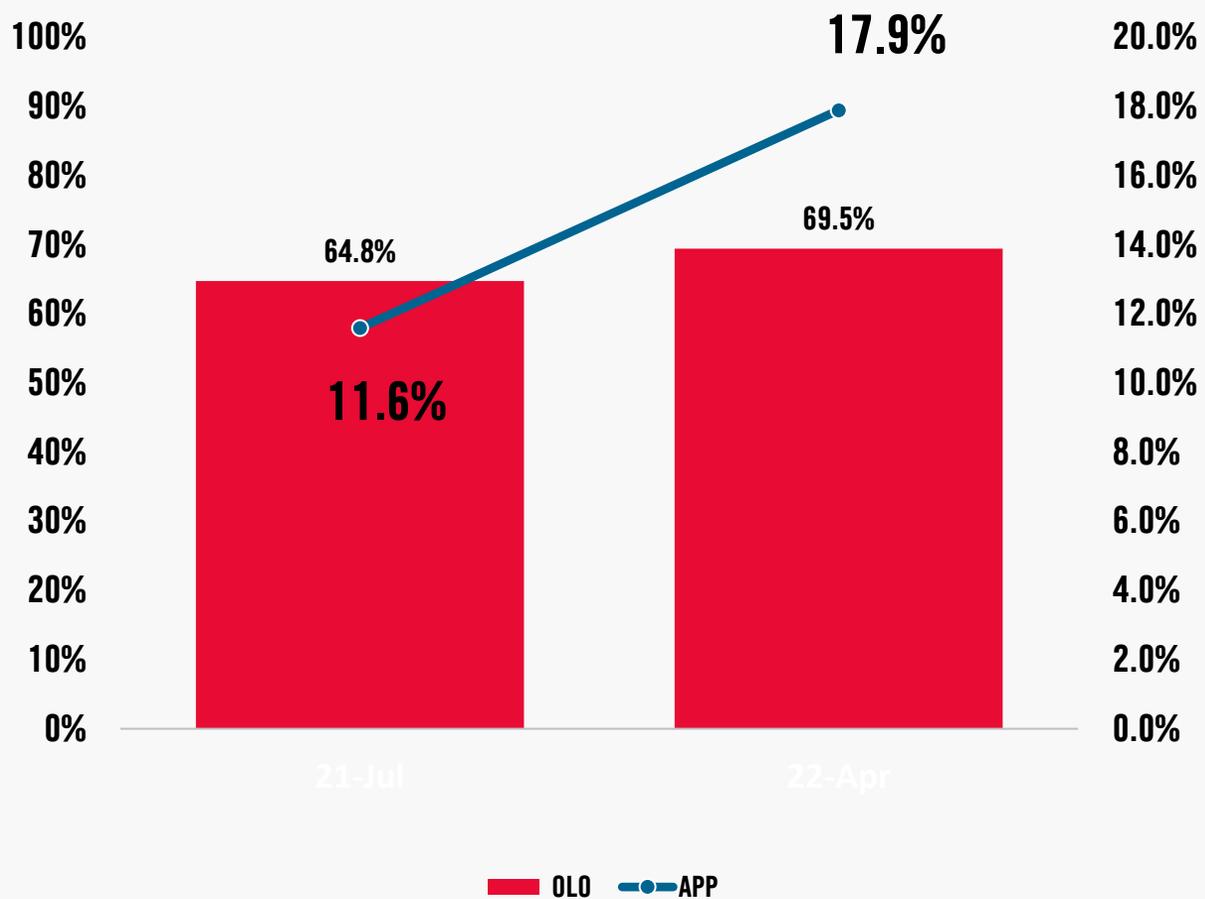


## A NEW APPROACH TO MARKETING OUR PRODUCT FOR OUR BRAND RELAUNCH



# NEW TECHNOLOGY

DOMINO'S APP: LAUNCHED IN JULY 2021 AND IS A GROWING PART OF DIGITAL SALES



DOMINO'S APP (TAIWAN)

# TAIWAN ESG MISSIONS AND GOALS

## 2022-2023 MISSION AND GOAL IN TAIWAN

MARCH 2022

INTRODUCING ESG

JULY 2022

FEED THE NEED

JULY 2022

EMPLOYEE CARE

DECEMBER 2022

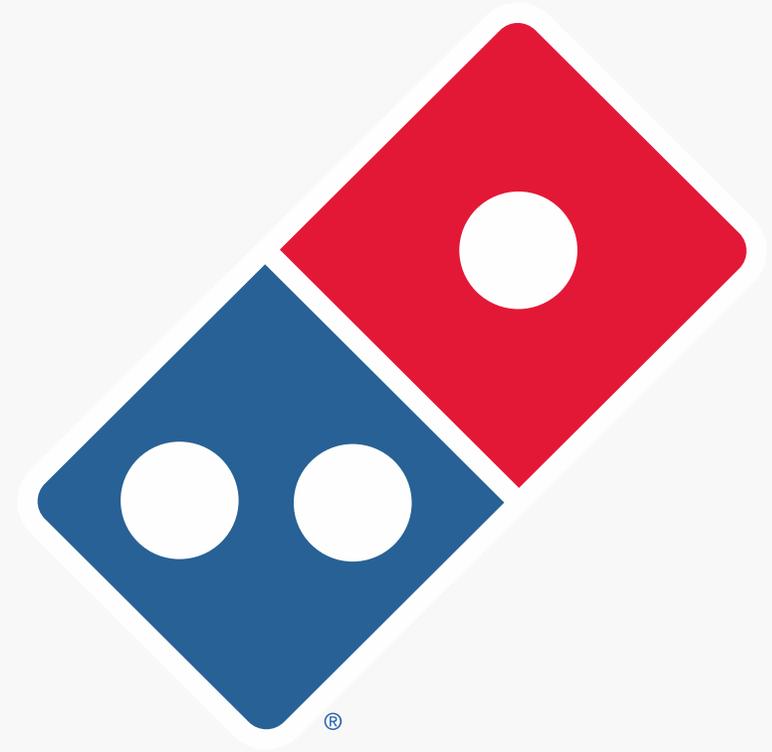
ELIMINATE PLASTICS  
FOOD SAFETY ON WEBSITE

2022-2023

E-SCOOTERS  
PACKAGING FSC

# OUR GOAL AND FUTURE PLANS

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# OUR GOAL: BECOME DOMINANT NUMBER 1

---



# OUR GOAL



**TO HELP OUR LOCAL OPERATIONS GROW BY INTRODUCING THEM TO NEW TECHNOLOGIES AND OPERATIONS THAT HAVE HELPED FRANCHISEES GROW AND PROSPER IN MULTIPLE MARKETS**

**DIGITAL AND  
TECHNOLOGY**

**MARKETING**

**DATA AND  
INSIGHTS**

**INVESTING IN  
GROWTH**

# STRATEGIC PLAN FOR GROWTH



OUR STRATEGIC PLAN FOR THE MARKET IS METHODICAL, BUILDING ON LESSONS FROM ENTERING NEW MARKETS



**TEST AND LEARN**  
**(0-1 YEARS)**



**INTEGRATION AND  
INVESTMENT**  
**(0-2 YEARS)**



**GROWTH**  
**(THEREAFTER)**

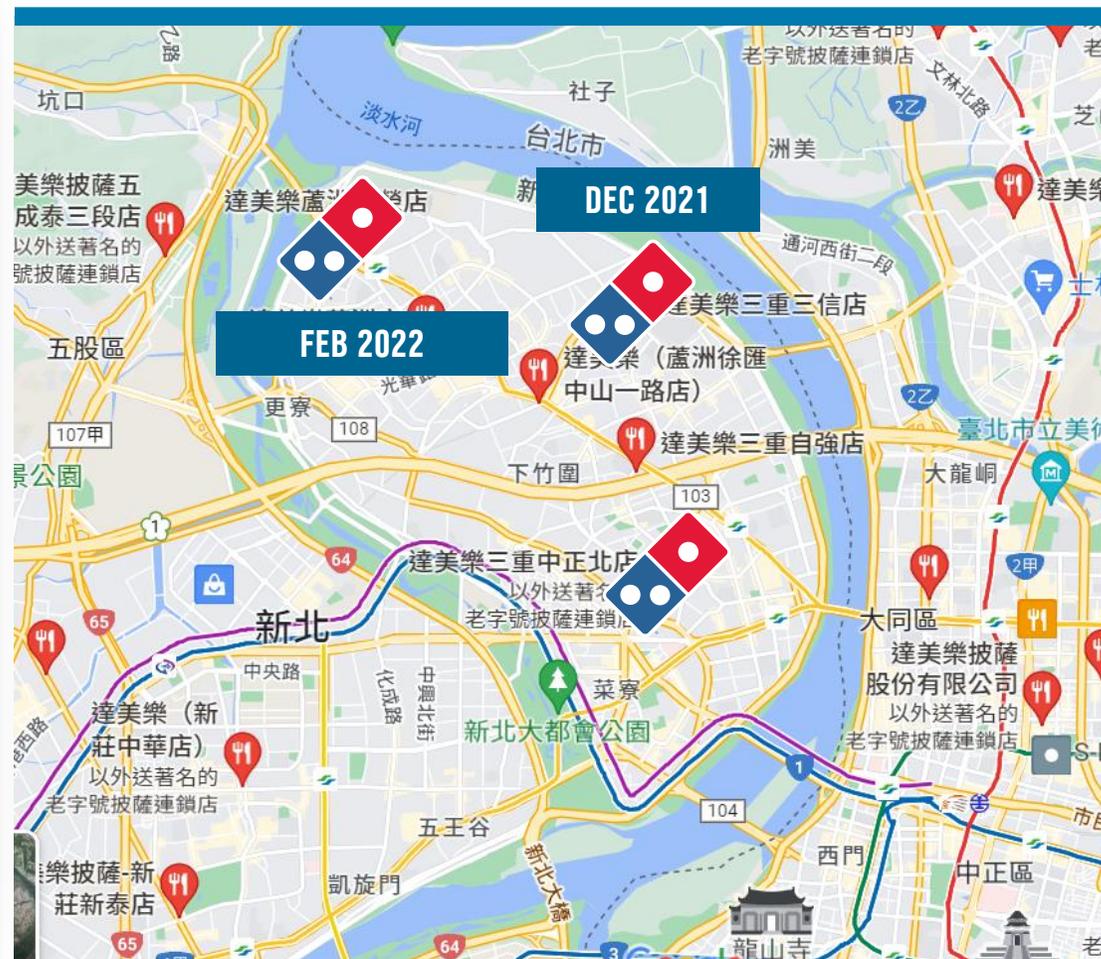
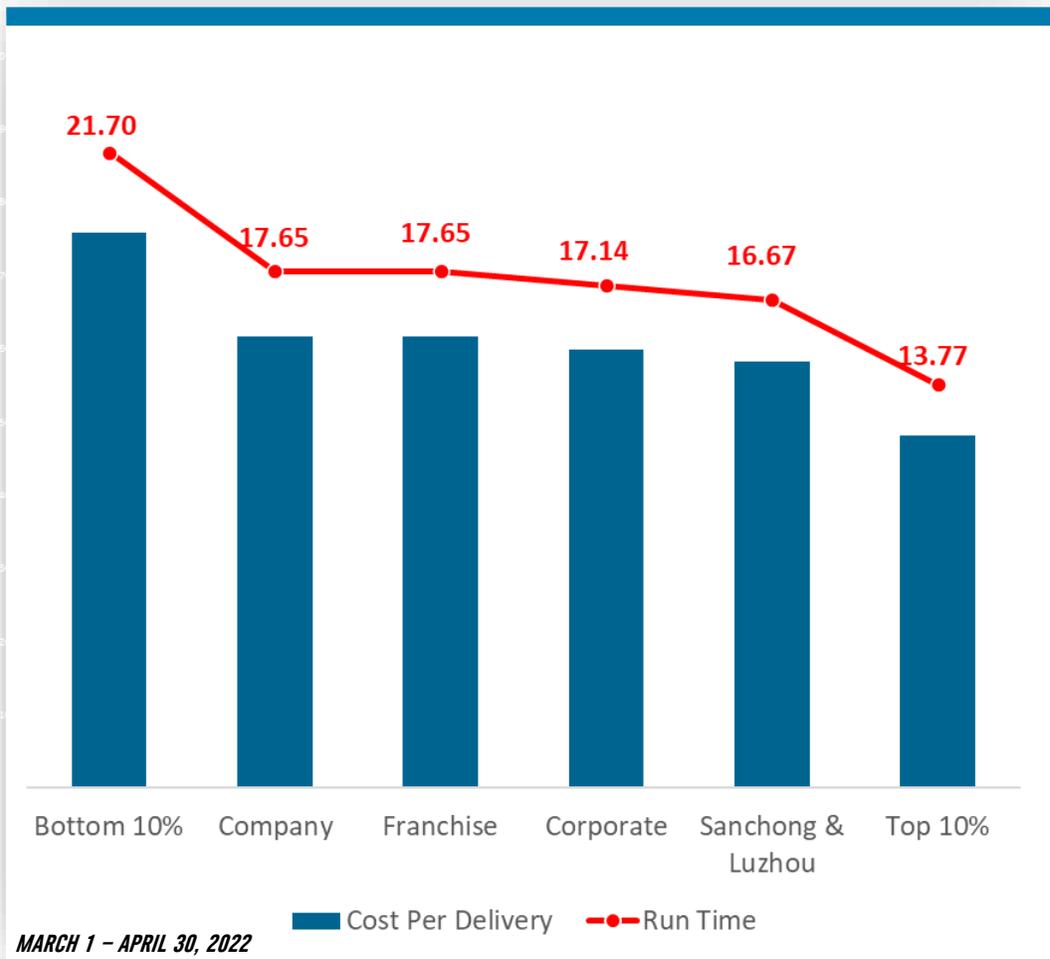
# HOW WE GET THERE



- **HVM (HIGH VOLUME MENTALITY)**
- **PTE (PATH TO EXCELLENCE)**
- **NEW TECHNOLOGY**
- **CUSTOMER LIFETIME VALUE (PSI/\$=V)**
- **STRATEGIC MARKETING**
- **FORTRESSING THE MARKET**
- **MOTIVATED FRANCHISEES**

# COST OF DELIVERY

## TOP 10% OF STORES WITH A DELIVERY COST 20-30% LOWER THAN OTHER STORES



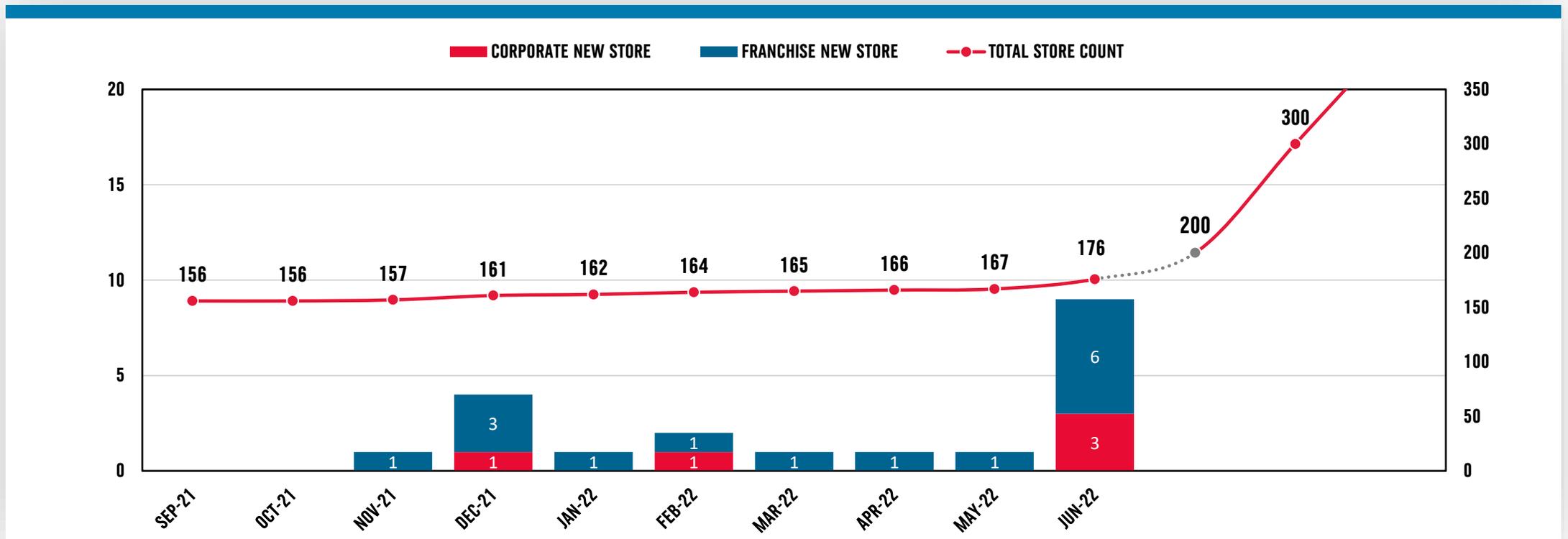
# DOMINO'S TAIWAN FUTURE OUTLOOK

WE HAVE A LONG WAY TO BECOME THE DOMINANT #1

✓ BUT WE HAVE THE RUNWAY TO GET THERE

LONG-TERM OUTLOOK OF 400 STORES

## TAIWAN NEW STORE GROWTH



# Q&A

..... AND .....

## LEADERSHIP ANNOUNCEMENT

PRESENTED BY

.....

**DON MEIJ**

GROUP CEO & MANAGING DIRECTOR



# INTRODUCING OUR ASIA LEADERSHIP TEAM



**JOSH KILIMNIK**  
CEO ASIA PACIFIC

~20 years in Domino's, starting in stores in Australia as a delivery driver and store manager. After leadership roles, including General Manager, New Zealand, Josh served as Vice President for Domino's Pizza Inc, supporting Domino's in the Middle East, Europe and Africa.

Formerly Domino's Japan CEO, Josh was appointed APAC CEO in 2021, to lead the company's next phase of significant growth.



**MARTIN STEENKS**  
CEO JAPAN

25 years in Domino's

Experience in store operations and a successful franchisee in the Netherlands, in charge of franchisee development as Franchisee Operations Director. Appointed CEO Taiwan in 2021, then CEO Japan in 2022.



**RONALD DEKKER**  
CEO TAIWAN

25 years in Domino's, including as an award winning multi-unit franchisee.

Ronald was previously Head of Brand Design, where his responsibilities included design, growth and store development.

