



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

20 October 2021

Domino's Europe Investor Day

The Management of Domino's Pizza Enterprises Ltd (ASX:DMP) invites investors to our 2021 Europe Investor Day, (virtually), on October 20, to provide insights into our European operations and their long-term outlook.

The slides associated with this presentation are attached with this announcement (PDF).

To access the video presentation, visit: <https://vimeo.com/636103990/3518c75659>

Format

The format for this Investor Day will be a series of pre-recorded video presentations from EU Management (link above), followed by a Live Q&A.

6:00PM (Brisbane): Live Q&A session commences

As with previous Investor Days, no Trading Update will be provided.

Q&A:

- Don Meij (Group CEO)
- Andre Ten Wolde (Europe CEO)
- John Harney (Group Chief Procurement Officer)
- Misja Vroom (Netherlands CEO)
- Kellie Taylor (Denmark Country Manager)
- Andrew Bradley (France CEO)
- Stoffel Thijs (Germany CEO)

To register for the Q&A:

<https://investors.dominos.com.au/presentations/2021/09/22/eu-investor-day-october-20>

A copy of the Q&A video will subsequently be available on Domino's Investors website.

To subscribe for DMP Investor updates: <https://investors.dominos.com.au/subscribe>

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.

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DOMINO'S PIZZA ENTERPRISES LTD
EUROPE INVESTOR DAY
OCTOBER 20, 2021

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

TAIWAN

TODAY'S SPEAKERS



STOFFEL THIJIS
CEO GERMANY



KELLIE TAYLOR
COUNTRY MANAGER DENMARK



DON MEIJ
GROUP CEO & MD



JOHN HARNEY
GROUP CHIEF PROCUREMENT



MISJA VROOM
CEO NETHERLANDS



ANDRE TEN WOLDE
CEO EUROPE



ANDREW BRADLEY
CEO FRANCE

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DOMINO'S PIZZA ENTERPRISES LTD - EUROPE
ANDRE TEN WOLDE

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

TAIWAN

EUROPE

- 185 million population
- 1,300 stores [current]
- 3,050 stores [2028-2033]
- Experienced leadership team

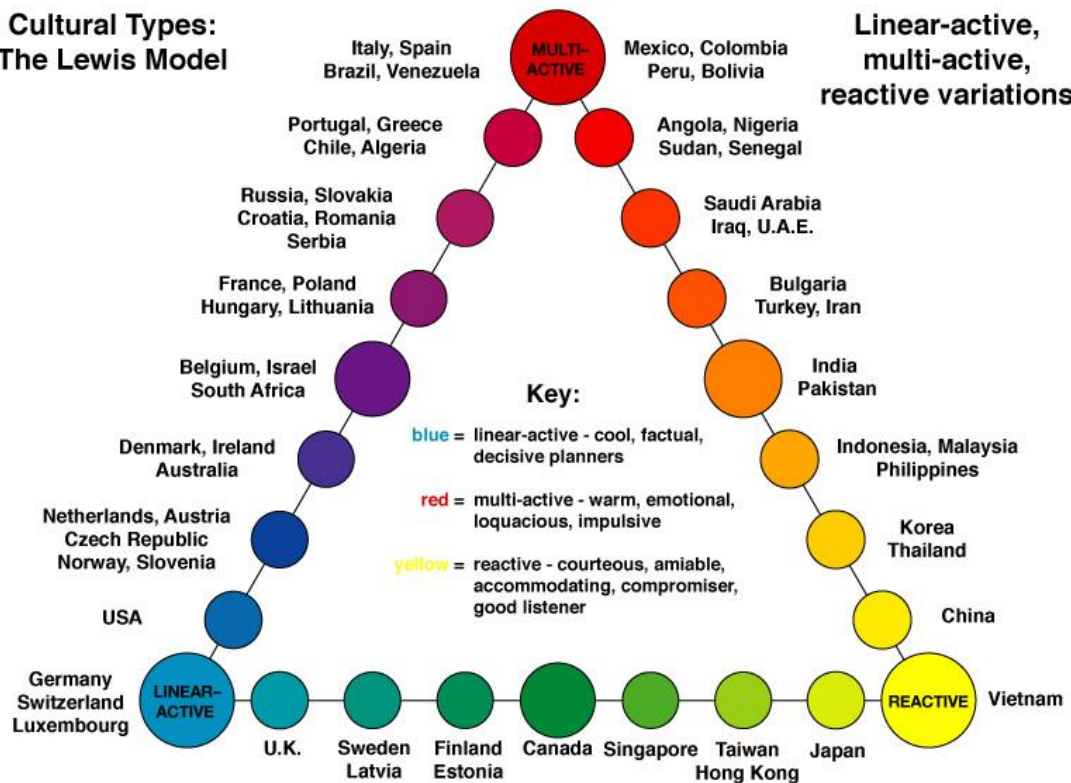


ONE EUROPE?

Culture is important as it decides:

- How opinions are formed and decisions are taken
- How people negotiate, deal with conflicts or problems
- How people co-operate and communicate

Cultural Types: The Lewis Model



UNITED STATES OF EUROPE



NETHERLANDS

MARGHERITA
PEPPERONI
SHOARMA



BELGIUM

BBQ CHICKEN
MARGHERITA
AMERICANA



FRANCE

CANNIBALE
4 FROMAGE
SAVOYARDE



GERMANY

SALAMI
MARGHERITA
TUNA



DENMARK

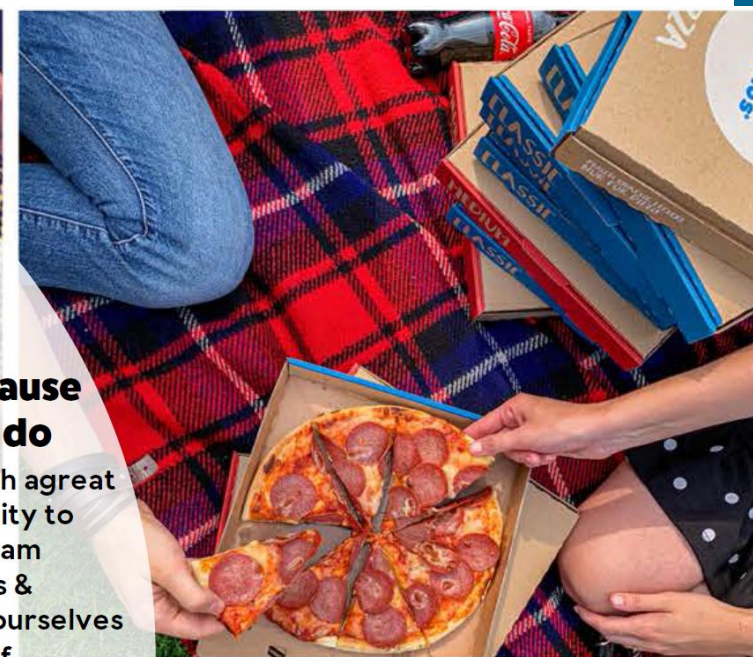
PEPPERONI
MARGHERITA
PEPPERONI
FEAST



LUXEMBOURG

MARGHERITA
PEPPERONI
BBQ CHICKEN





Be generous and provide joyful experiences

Fun is in our DNA. It makes our people happier. Helping the provide a joyful customer experience. Our empathy, generosity and optimism are catching. They spread outwards – starting with us. Crucial because we're really selling happiness & connection – that just happen to come in pizza form.

Invest to create Devotion

We want customers for life. Our obsession is providing a brilliant Domino's experience. Set the bar high – to delight the most demanding people. That guides everything we do – including the way we do innovation & efficiency programs and the reason & way we use data.

Do the right thing because it's the right thing to do

We behave well, with a great sense of responsibility to our communities, team customers, partners & investors. We hold ourselves to a high standard of integrity – recognising how valuable, yet fragile, trust can be.

OUR PIZZA BRINGS PEOPLE CLOSER

Help people grow & prosper

We make people better off: team members, franchisees, our company and the communities in which we live. We have a strong entrepreneurial spirit. Balanced with a determination to give our team rewarding experiences, opportunities and a great place to work.

Crush Convention

We defy the convention which identifies 3 main drivers: Fast, Affordable & Good Quality. And believes you must settle for any two. We're unbeatable when we deliver all 3 seamlessly. Again. And again. And again.

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK



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**DOMINO'S PIZZA BENELUX
MISJA VROOM**

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

TAIWAN

CONTENTS

- 1 | Introduction and background Misja Vroom
- 2 | The history of Domino's Pizza in the Benelux
- 3 | Domino's Pizza Benelux: today
- 4 | The future: growth and doing the right thing



INTRODUCING MISJA VROOM

From store manager, to multi franchisee, to CEO

- Started Domino's 27 years ago in 1994 as a store manager
- Become a franchisee with two stores in 2000
- In 2006: five-store franchisee
- In 2012: successful franchisee with 14 stores with partner franchisee and current CEO BELUX Ringo Joannes.
- August 2012: Joined the DPNL Leadership Team and sold stores
- Responsible for growth from 19 to 100 stores in Belgium from 2014-2019
- In 2018 CEO of DPNL

"My job is to motivate people to go for that extra mile every day"



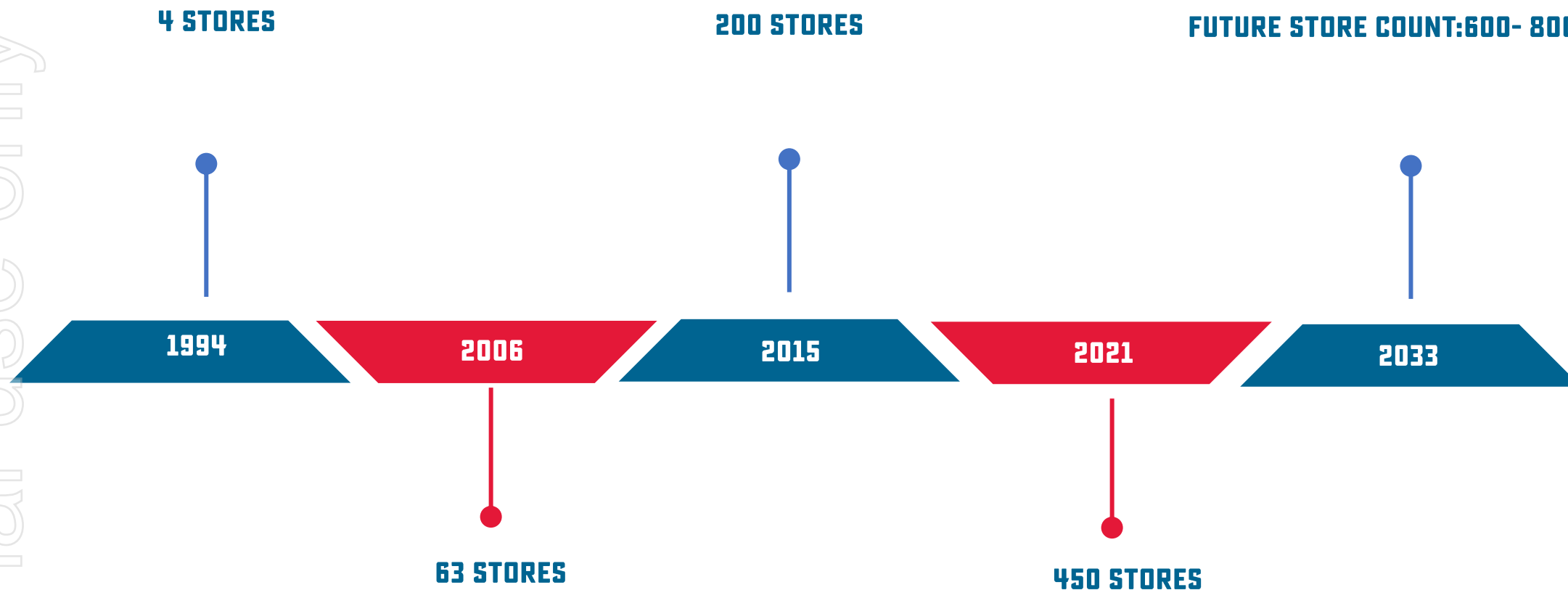
HISTORY OF BENELUX

- 2006: DPE bought Domino's Netherlands and Belgium (package deal with Domino's France)
- NL was considered as a struggling market:
 - *Dutch people prefer traditional QSR like fry shops*
 - *Low AWOC and AWUS*
 - *NYP larger and faster growing competitor (75 stores in 2005)*
 - *Minimal growth in sales and store numbers*

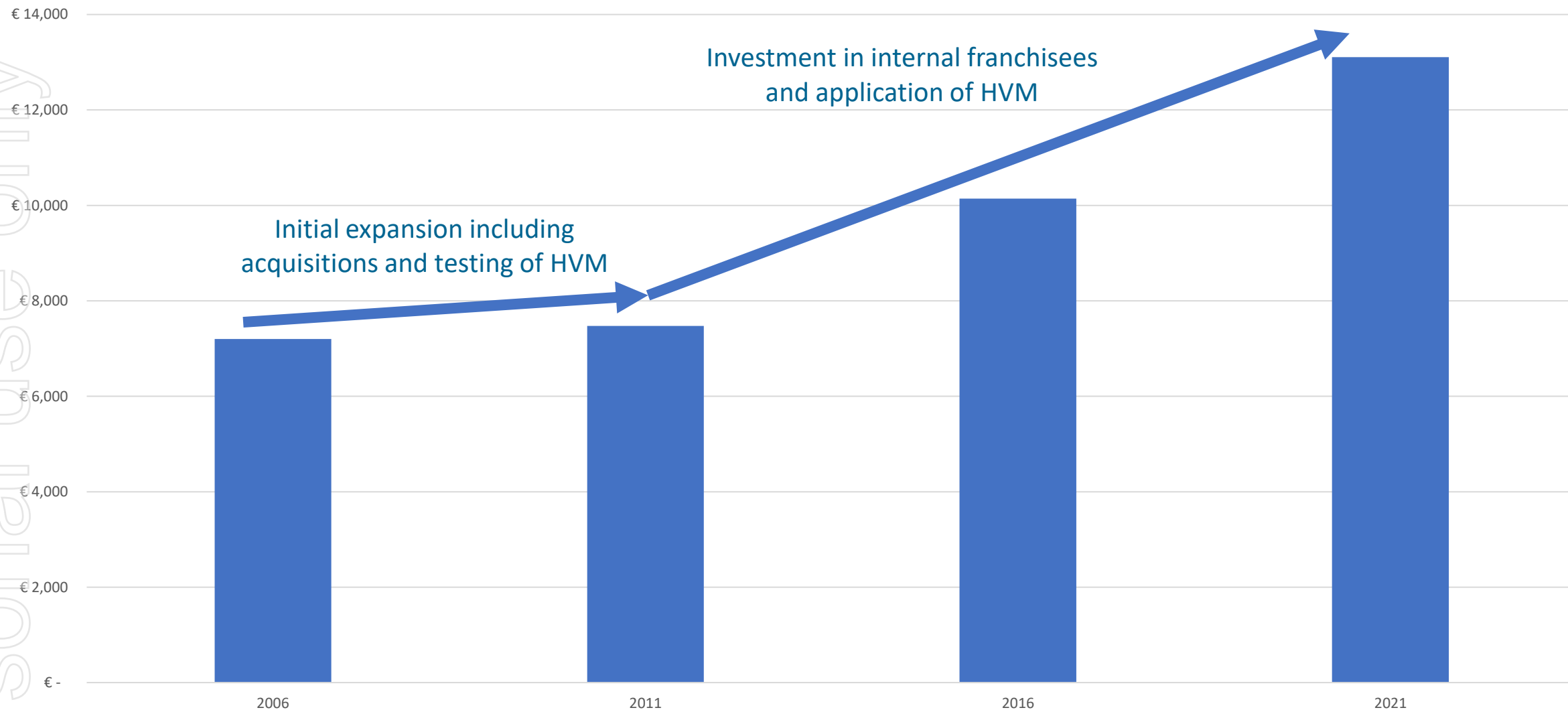


AWOC: Average weekly order count
AWUS: Average weekly unit sales

HISTORY OF STORE GROWTH: BENELUX

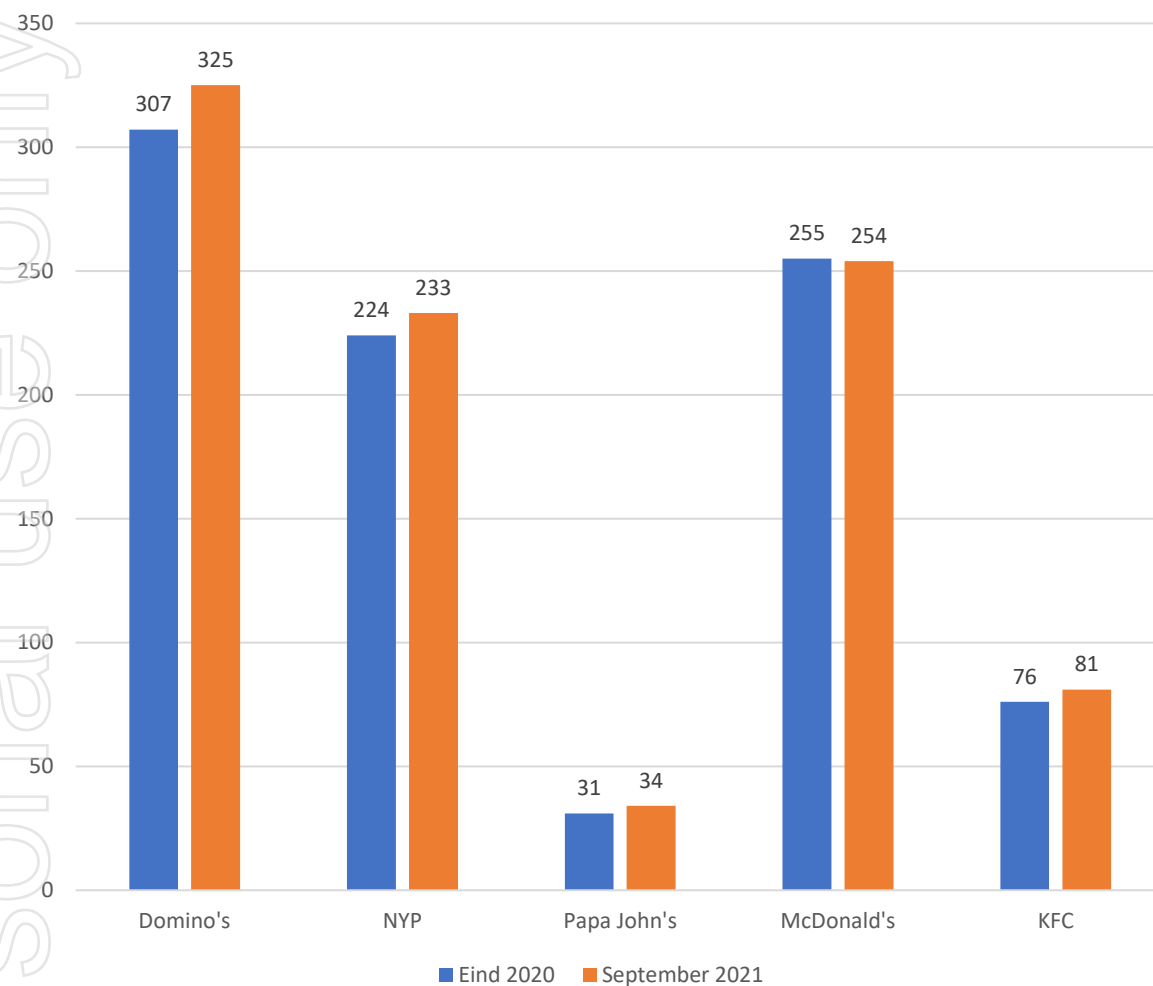


THE NUMBERS TODAY: AWUS OVER THE YEARS₁

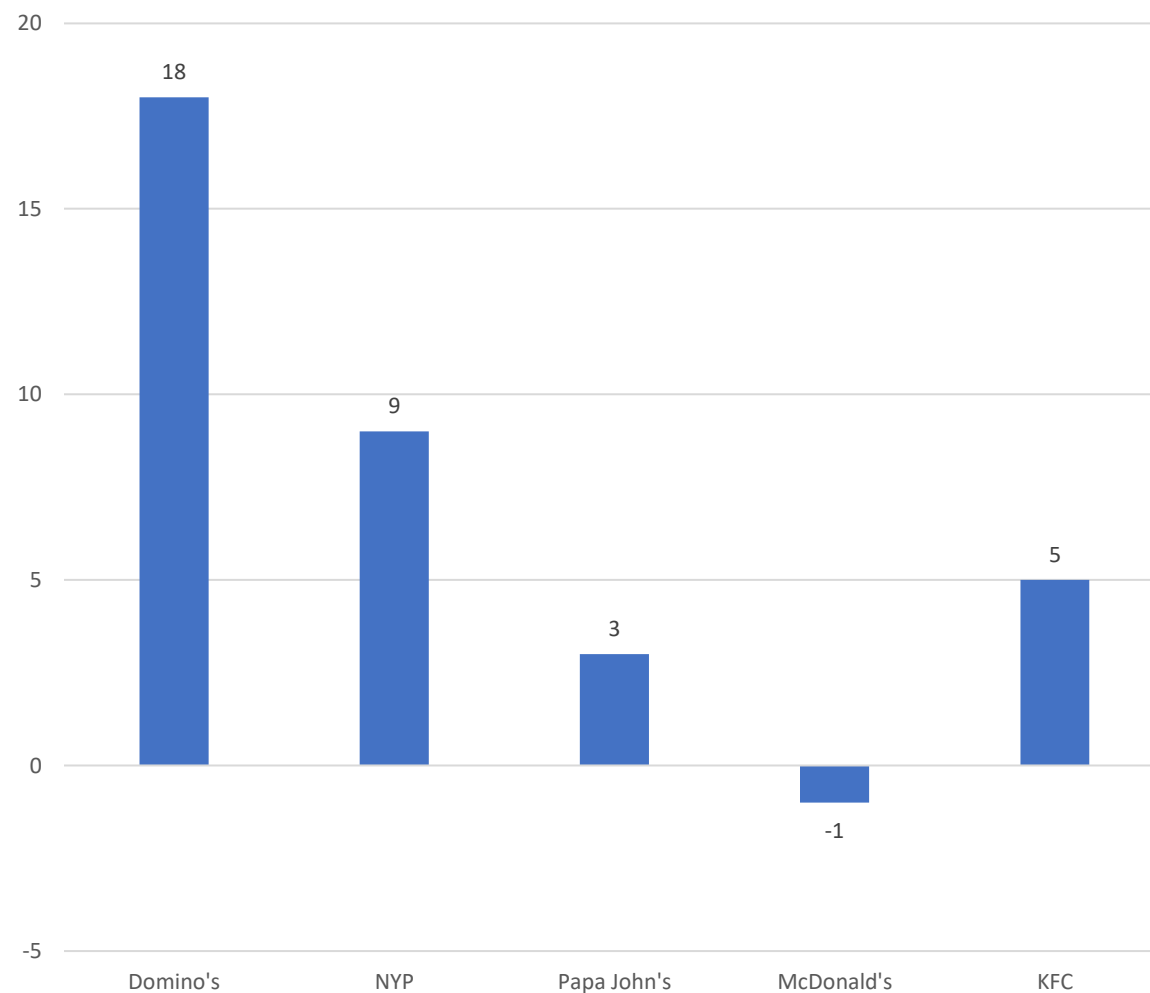


NETHERLANDS COMPETITIVE LANDSCAPE

Number of stores



New stores 2021



BENELUX TODAY

The Benelux is now the **centre** of excellence.
We are **number 1 QSR** in store count.

- More stores than McDonalds and Pizza Hut.
- A **growing team** of leaders and future leaders
- We have shown and **set the example** of what we can achieve in Europe.

Including:

- Sales growth: organic + store openings
- Sales record weeks in April, and June (2x)
- New products: Domino's Crunchy Chicken & plant-based alternatives
- Technology-first: Loyalty, Kiosk, Group Ordering
- Customer first: World Record Delivery Time
- Belgium: #1 + national TV
- ESG: Doing the right thing for our people, planet and the environment



WHAT WE ARE PROUD OF

- Participating in ESG projects and partnerships:
 - JINC
 - Domino's Next Talent Network
- Authentic, honest and real food:
 - 92% menu = free from artificial colours and flavours and preservatives
 - Partnership with CIWIF (Better Chicken Commitment)
- Local pizza flavours:
 - Bicky Burger Pizza
 - Frikan Dutch
 - Vegeroni ('22)
- 80% Electric delivery



OPPORTUNITIES

- Number #1 store count
- Strong franchisee network: 95% of the franchisees started their career as a driver
- Market research showing us opportunities to grow:
 - Increase of food delivery in Europe
 - Strong YoY growth expected for the next five years
 - Current customer frequency leaves room for opportunity
 - Our rush hours are between 5PM and 7PM
 - The new commissary is ready for further growth: we can resource a doubling of the business
 - Choice and variation: expand menu with DCC, plant-based alternatives, desserts.

WE ARE
NUMBER #1



FUTURE PLANS

- 100% clean label by the end of 2021
- Expand plant-based alternatives
- Develop whole-grain dough
- Introduction of Nutri-Score
- 100% Electric Delivery in 2025

HUNGRY
TO BE
BETTER



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**DOMINO'S PIZZA FRANCE
ANDREW BRADLEY**

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

TAIWAN

INTRODUCTION

- Food quality is very important for France
 - But we don't just eat foie gras
- We eat a lot of pizzas, the second highest amount in the world
- You can find pizza everywhere, but it is a very fragmented market
- Pizzas often have a cream base, and regional flavours
- France is 67 million people
- Paris is, not surprisingly, the biggest city (11 million)



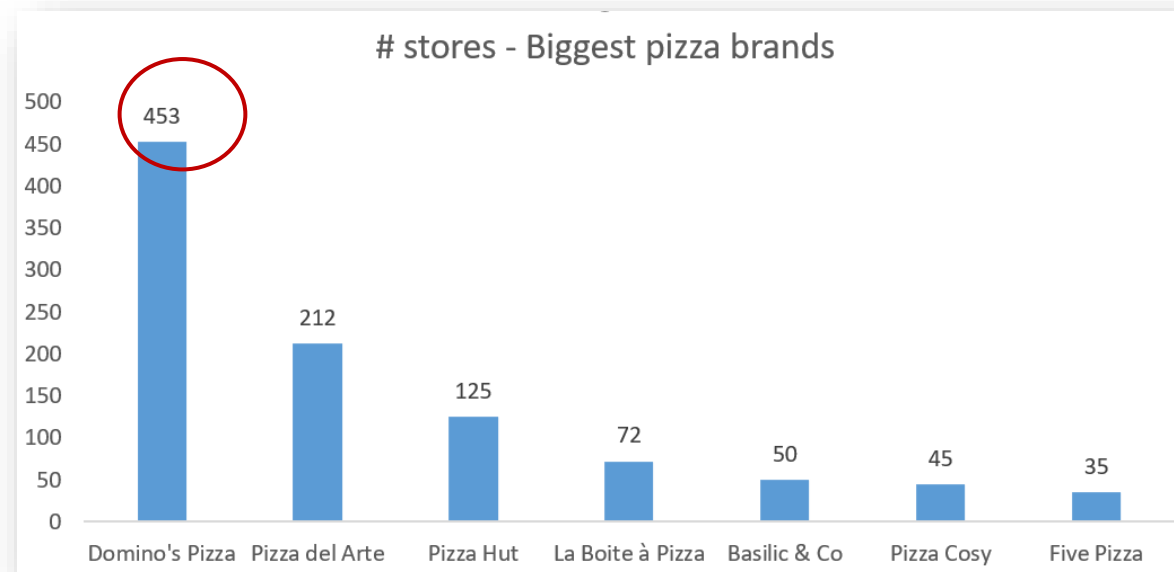
INTRODUCING ANDREW BRADLEY

- British by birth but now dual nationality
- 2003: joined Domino's after 20 years with Nestlé
- Experienced as a multi-unit franchisee and head office (including Chief Operations Officer)
- First store: the 64th in France
Very few people knew the brand
- Today Domino's France operates 453 stores and is by far the biggest pizza brand in the country



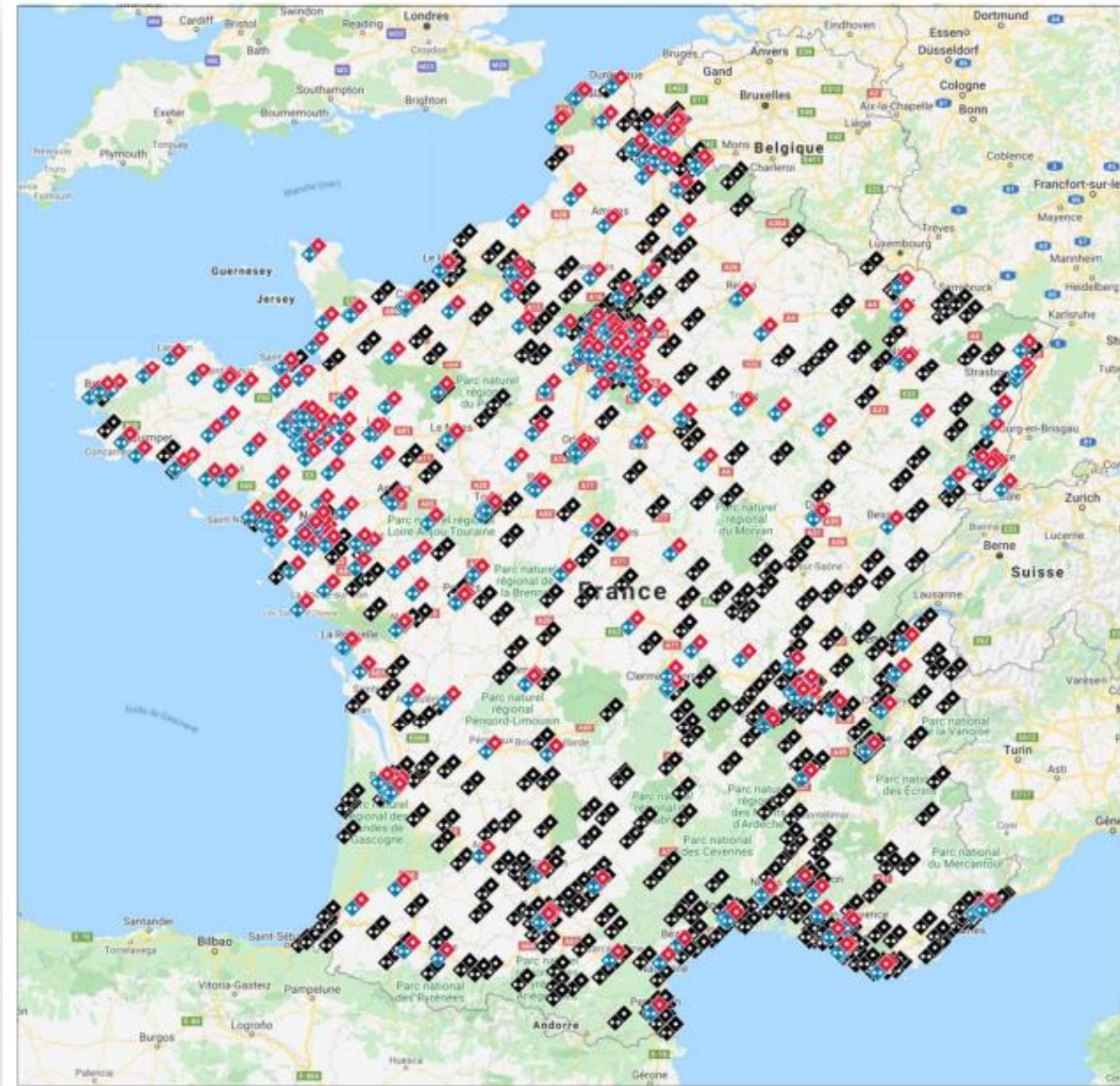
THE COMPETITIVE LANDSCAPE

- With High Volume Mentality we outgrew the competition
- Current overall market share is small
- Pizza market still fragmented
- The QSR market: Domino's second in store count



STRATEGY: AMBITIOUS STORE OPENING PLANS

- Domino's France only cover 35% of the population
- We have mapped our potential locations for our growth milestones
- With our franchisees Domino's delivered record store openings in FY21
- Our plan is to set a new record in FY22



STRATEGY: AMBITIOUS STORE OPENING PLANS

- Increasingly, our emerging leaders will open these stores



Mahozo : 34 years old and franchisee of 3 stores in Le Mans



Khaoussou : 28 years old and franchisee of Toulouse Lascrosse



Achraf : joined the Domino's family in 2009 as delivery driver and now franchisee in Brittany

STRATEGY: CONTINUE TO REINFORCE OUR FRANCHISEE NETWORK

- Our business is built on a strong network and working relationship with franchisees.
- We are strengthening our network by bringing in new franchisees through our emerging leaders
- Franchisee relationship has in the past sometimes been difficult but that has evolved
- Our people-first approach through COVID-19 has delivered a stronger relationship with franchisees



STRATEGY: CONTINUE TO EVOLVE WITH THE WORLD IN WHICH WE LIVE

- Reinforce our position as the delivery experts while making the transition to electric.
 - Today 65% Electric delivery
- Evolving the range, French ingredients, organic etc
- Premium range, Signatures
- Nutriscore = transparency



POUR VOTRE SANTÉ, PRATIQUEZ UNE ACTIVITÉ PHYSIQUE RÉGULIÈRE. WWW.MANGERBOUGER.FR



STRATEGY: CONTINUE TO EVOLVE

- Also making significant changes in our logistics to reduce packaging and the number of trucks needed
- To be seen as a good employer, a fun place to work
- Be seen as a caring company



Fondation
Domino's





CONCLUSION

- Ambitious growth plans – and plenty of room to grow
- Industry-leading best practices
- All made possible by a dynamic and motivated team



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**DOMINO'S PIZZA GERMANY
STOFFEL THIJS**

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

TAIWAN

INTRODUCING STOFFEL THIJSS

- Started as a delivery driver in 1997 at the age of 16
- Worked in store in various roles during my Bachelors degree in Economics
- Became a franchisee in 2006 at the age of 24
- Operated a total of four stores over a period of five years
- Joined DPE as the Head of Corporate Stores in the Netherlands
- Part of the conversion team in Germany converting Joey's pizza in 2016
- Became the French CEO in 2017
- Returned to Germany as the CEO in 2018



GERMAN MENU

- Germany is the only country which sells broccoli on a pizza
- 3.5m pizzas in past financial year had broccoli on them



- Pizzabrötchen are very popular in Germany
- We have 10 different options and sell more than 5.5m a year



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OUR HISTORY



2016: JOEY'S CONVERSION

- In 2015 DPE partnered up with Domino's Pizza Group from the UK who owned the master franchise rights to Germany
- In 2016 this JV bought Joey's Pizza, with 213 stores, the market leader for pizza delivery in Germany
- After this conversion Domino's was the number one pizza delivery chain in Germany



2018: HALLO PIZZA CONVERSION

- In 2018 Hallo Pizza, the then-number-two in the market, was bought
- The conversion was completed in 2019. the additional stores made Domino's the undisputed market leader
- Domino's was now three times the size of the-then-number two, Call-a-Pizza



THE THREE STEP CONVERSION APPROACH



THE THREE STEP APPROACH

**PHYSICAL
CONVERSION**

1

**MENTAL
CONVERSION
HVM**

2

**ORGANIC
STORE
GROWTH**

3

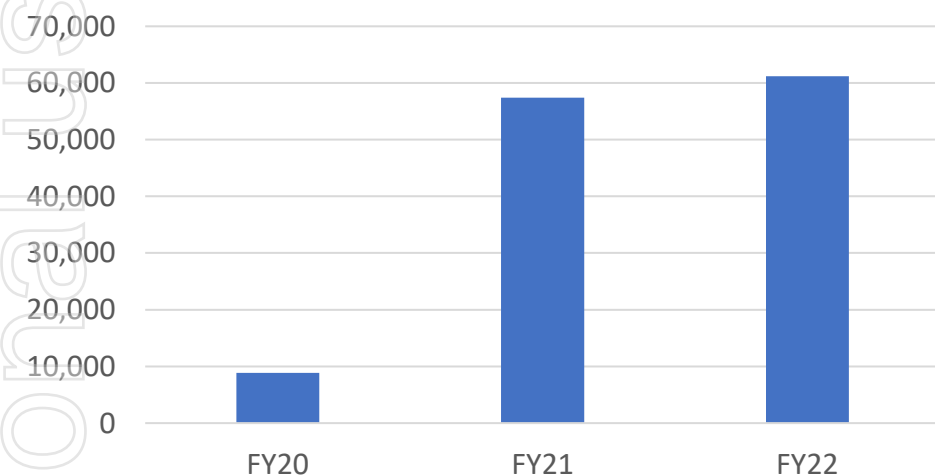


THE IMPORTANCE OF TELEVISION ADVERTISING

- We were able to grow our weeks of TV by 125%

Marketing	Weeks of TV	GRP's
FY20	16	553
FY21	36	1.594
FY22	36	1.700

TV presence



22€

2 x Pizza in Größe Classic
+ 2 x Pizzabrötchen
+ 2 x Lava Cake

1€ RABATT
auf die Pizza
VEGAN BBQ

VEGANUARY

NUR AM 07.02.21 NUR 15€
SUPER BOWL
watch@home
DEAL

7 Chicken Strippers
+ 8 Chicken Wings
+ 7 Cheese Bites
+ 8 Pizzabrötchen



DOMINO'S CLUB TV SPOT

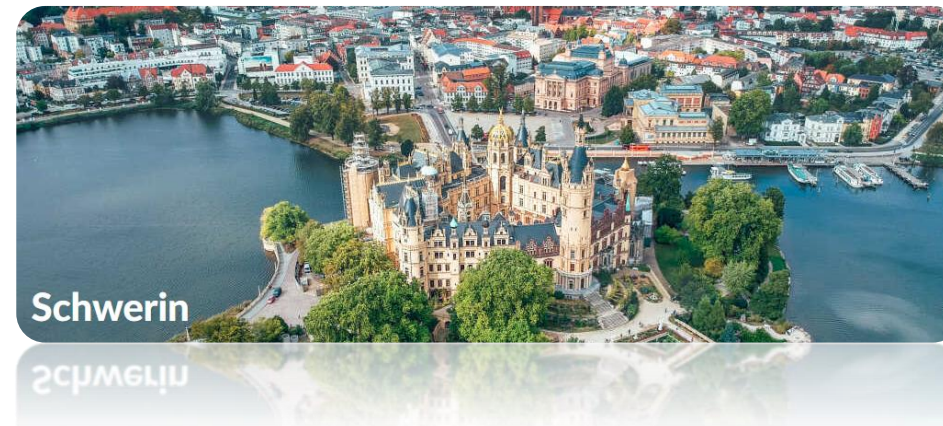


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SHOWCASE SCHWERIN

- City in Northern Germany with 95.818 inhabitants living there
- Domino's runs three stores there which are very successful
- AWUS growth of 61% from FY18 to FY21



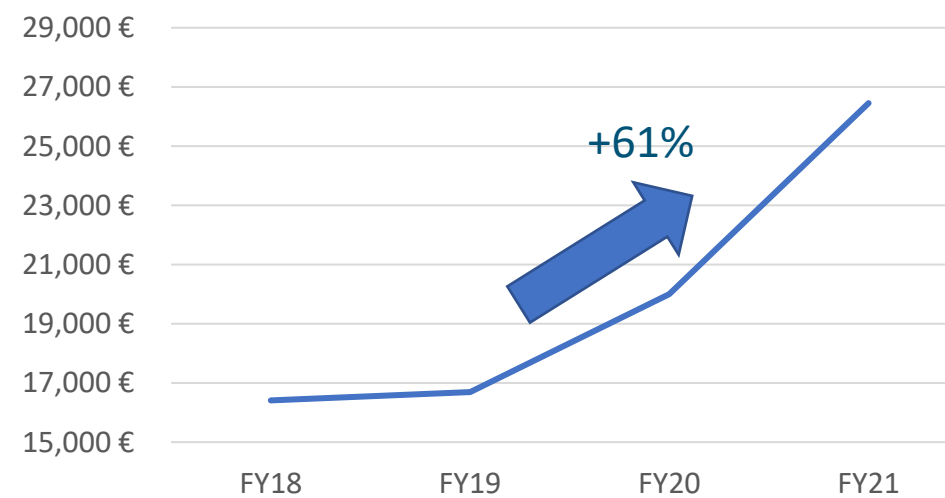
FY 18		
Store Name	AWUS	AWUS per Inhabitant
Schwerin Dreesch	17.886 €	0,53 €
Schwerin Nord	15.541 €	0,47 €
Schwerin Stadt	15.821 €	0,74 €
Gesamt	16.416 €	0,19 €

FY 19		
Store Name	AWUS	AWUS per Inhabitant
Schwerin Dreesch	18.975 €	0,56 €
Schwerin Nord	15.685 €	0,47 €
Schwerin Stadt	15.430 €	0,72 €
Gesamt	16.697 €	0,19 €

FY 20		
Store Name	AWUS	AWUS per Inhabitant
Schwerin Dreesch	22.447 €	0,67 €
Schwerin Nord	18.887 €	0,57 €
Schwerin Stadt	18.675 €	0,87 €
Gesamt	20.003 €	0,23 €

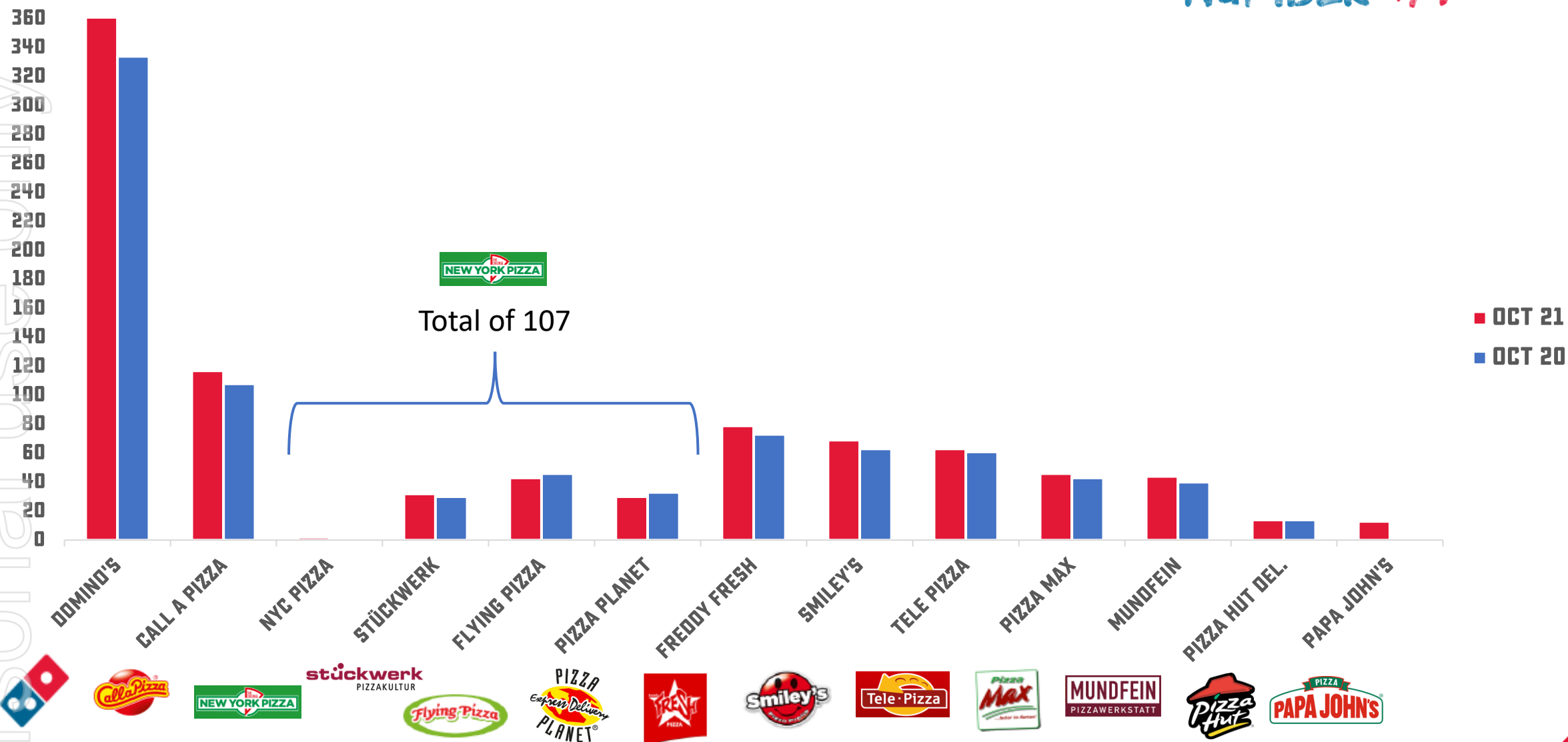
FY 21		
Store Name	AWUS	AWUS per Inhabitant
Schwerin Dreesch	28.547 €	0,85 €
Schwerin Nord	26.260 €	0,79 €
Schwerin Stadt	24.561 €	1,14 €
Gesamt	26.456 €	0,30 €

AWUS Schwerin



GERMAN COMPETITOR OVERVIEW

**WE ARE
NUMBER #1**



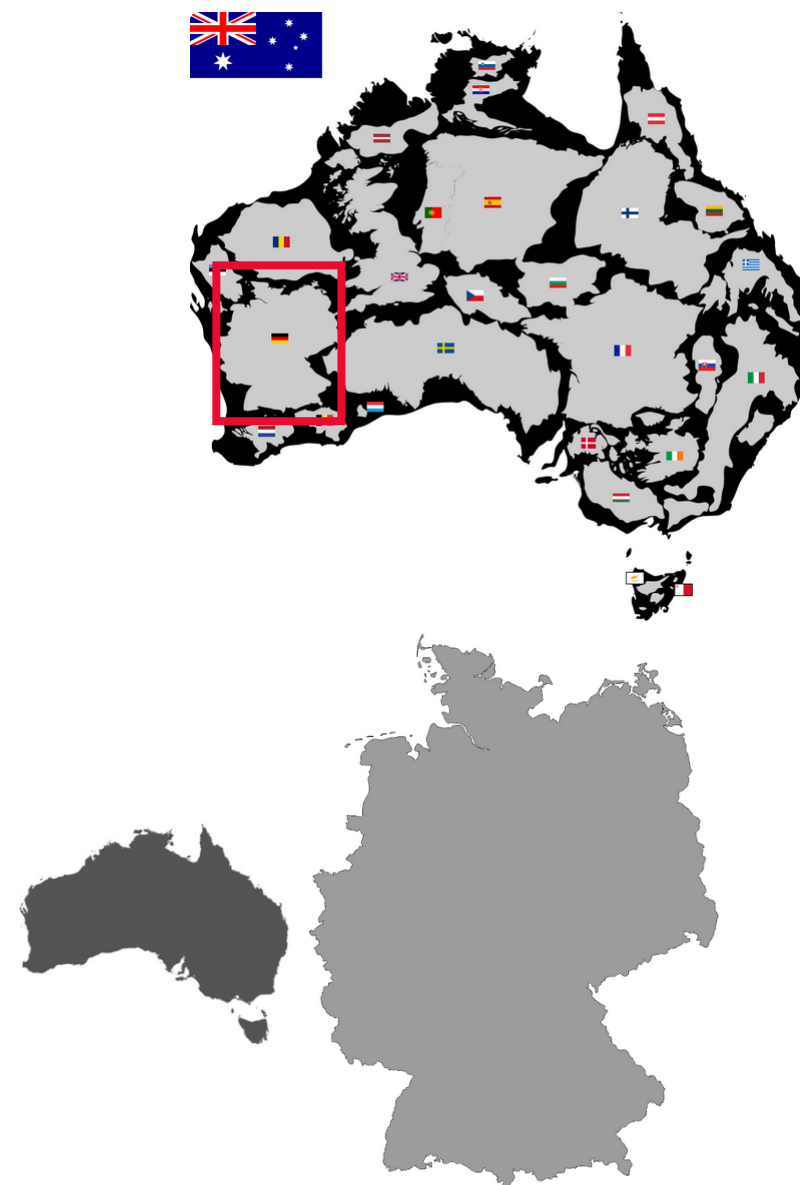
THE REGIONAL DEVELOPMENT APPROACH



HOW SMALL IS GERMANY COMPARED TO AUSTRALIA?

- ✓ Australia is more than 21 times bigger than Germany (based on land area)
- ✓ Whole Europe equals app. the size of Australia
- ✓ But 3 times more people live in Germany than in Australia
- ✓ Regarding inhabitants per store, there is still a massive potential for Germany

	Germany	Australia
Area in km ²	357.580	7.741.220
Inhabitants	83.093.000	25.366.000
Inhabitants per km ²	232	3
Domino's Stores	375	722
Inhabitants per Store	221.581	35.133



4 REGIONS IN GERMANY

Region	Stores	Inhabitants	Inhabitants per Store
North	113	13.425.836	118.813
East	126	16.199.653	128.569
South	69	35.594.001	515.855
West	67	17.947.221	267.869
Total	375	83.166.711	221.778



LOOKING FORWARD

- We are incredibly proud of where we are, but we know this is only the beginning

- Germany is a massive pizza market where we are still building the brand Domino's

- **Great pizzas, delivered fast** has always been our USP, with our new ESG department we will be focusing more and more on a third pillar, our social responsibility



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**DOMINO'S PIZZA DENMARK
KELLIE TAYLOR**

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

TAIWAN

NOT YOUR AVERAGE MARKET

FIRST DANISH STORE OPENS

DPE STARTS NEGOTIATING TO BUY

BUSINESS INSOLVENT - DPE BUYS MARKET

1997

2017

2017

2018

2019

PEAK STORE COUNT - 32

FOOD SCANDAL



INTRODUCING KELLIE TAYLOR

- Started as a pizza maker 1993
- Worked in store roles before progressing to store manager
- 1999 to 2007 – joined the corporate operations team responsible for training and standards
- 2007 – moved to Europe, with operational roles across multiple markets
- 2019 – Country Manager of Denmark



REBUILDING DOMINO'S IN DENMARK



AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK



THE PLAN



REBUILDING THE STORES

REBUILDING THE TEAM

SYSTEMS TO MONITOR STORES

FIND FAIR AND LEGAL COST SAVINGS



THE SAME BUT DIFFERENT

ONE OTHER PIZZA CHAIN

ILD PIZZA - 17 STORES AND GROWING FAST

CARRY OUT MARKET

MIX IS 70% CARRYOUT - 30% DELIVERY

IT'S ALL ABOUT THE PEPPERONI

ABOUT 30% OF OUR PIZZA MIX IS PEPPERONI PIZZAS



WHAT'S NEXT



GROW THE TEAM

INCREASE OUR PROFILE IN THE MARKET

FRANCHISING ?



EVERYWHERE EXCEPT COPENHAGEN (EEC) - VIRGIN TERRITORY



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Domino's®

DOMINO'S PIZZA ENTERPRISES LTD - SUPPLY CHAIN JOHN HARNEY

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

TAIWAN

CONTENTS

1 | What is Supply Chain in DPE

2 | The Last Year

3 | Context

4 | The Future

5 | Green



WHAT IS SUPPLY CHAIN IN DPE?

BUSINESS ENABLER THAT MAXIMISES

- Agility
- Value
- Food Safety
- Bespoke
- Customer Service



THE LAST YEAR

**#1
PEOPLE**

SAFETY

**#2
SUPPLY**

ZERO INTERRUPTION

**#3
FUTURE**

INNOVATION



SOME CONTEXT

- The United States of Europe?
- 1300 stores in six sovereign nations
- A land area the size of NSW and Victoria but with 180m people
- A Delivery every 3 minutes



FUTURE IS CLEAR

- Growth
- Strengths
 - Agnostic
 - Agility
 - Security



FUTURE IS....GREEN

- Focussed
- Science based
- 3rd Party Support
- Field to Fork
- Key Partners



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DOMINO'S PIZZA ENTERPRISES LTD - EUROPE
ANDRE TEN WOLDE

AUSTRALIA

NEW ZEALAND

BELGIUM

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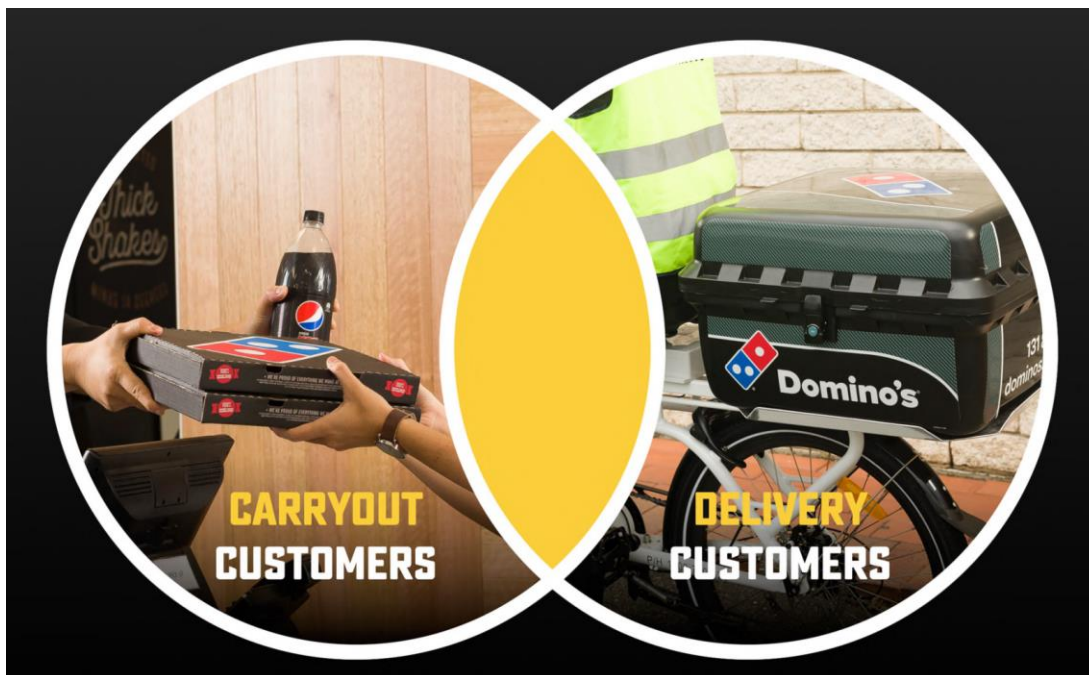
TAIWAN

WHAT ABOUT COVID?

COVID-19 had a different effect in different markets:

Obviously because of **different reactions and restrictions** in the markets, but also because of the **maturity and different makeup** of our business.

We are actually two businesses to customers:



NETWORK DENSITY BENCHMARKS

If Europe had the
current penetration
of:
THE NETHERLANDS

Meaning 1 store
per every 78,000
customers:

2,372 stores

If Europe had the
current penetration
of:
THE UK

Meaning 1 store
per every 56,500
customers:

3,274 stores

If Europe had the
current penetration
of:
ANZ

Meaning 1 store
per every 35,000
customers:

5,286 stores

If Europe had the
current penetration
of:
ICELAND

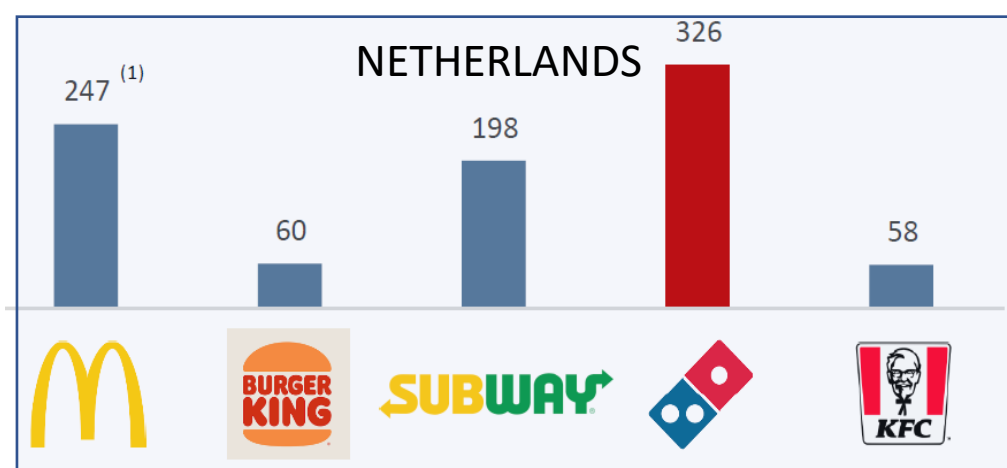
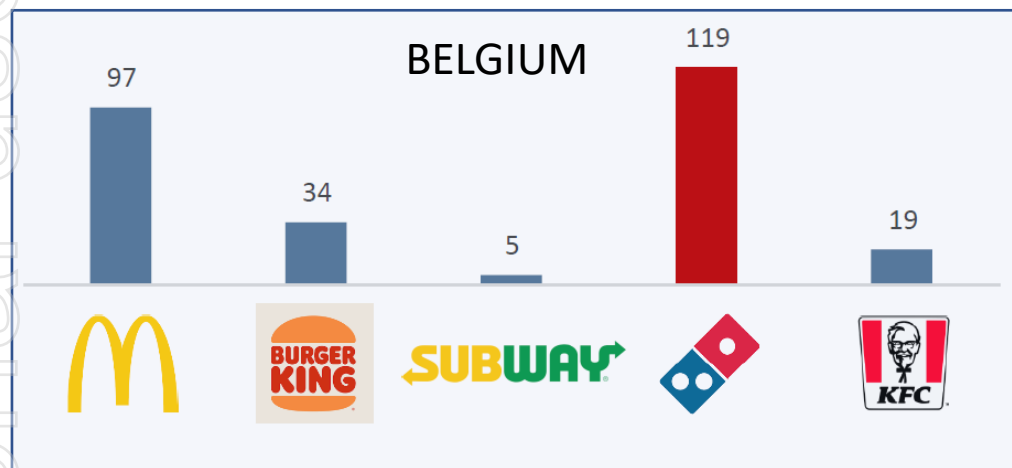
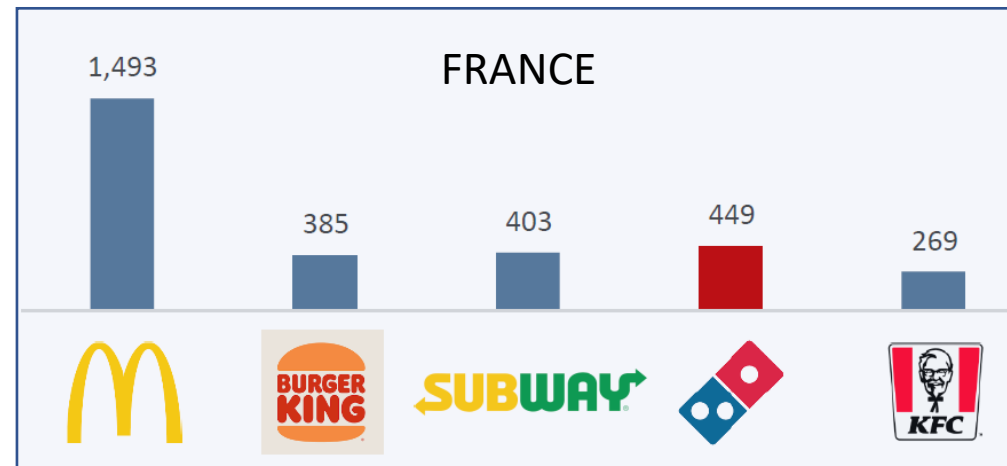
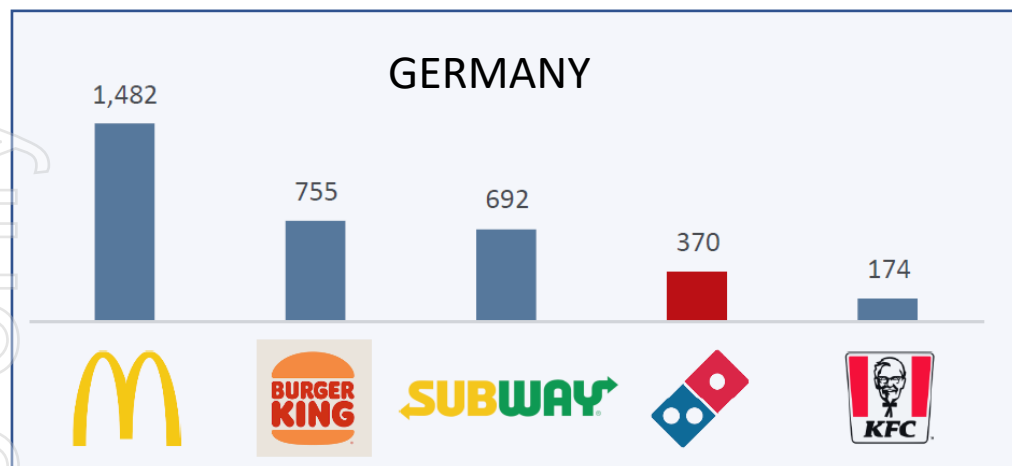
Meaning 1 store
per every 15,669
customers:

11,806 stores

REMEMBER OUR LONG-TERM EUROPE MILESTONE IS 3,050 STORES, +135%, BY 2033



STORE PENETRATION COMPARISONS



IN CONCLUSION

A values-driven organisation with a clear purpose

- Leadership with significant tenure
- A proven, locally-adaptable, model
- A strategy (HVM)
- Consumer-focussed
- The right products
- A solid platform
- Great franchise partners

And lots of room for growth...



FOR MORE INFORMATION

- Join us now for a Q&A session (6pm Brisbane time)
<https://investors.dominos.com.au/presentations/2021/09/22/eu-investor-day-october-20>
- To subscribe to DMP Investor updates:
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- To see more of our European operations:
<https://investors.dominos.com.au/videos>

