



# Investor Presentation and Domino's Head Office Tour 23 April 2015

**DON MEIJ**  
Group CEO/Managing  
Director

**ALLAN COLLINS**  
Chief Marketing Officer AU &  
NZ / Group Marketing  
Director

**MICHAEL GILLESPIE**  
Group Chief Digital Officer

**NICK KNIGHT**  
AU & NZ Operations Manager





**DON MEIJ**  
Group CEO/Managing  
Director

**Dream Bigger  
Dreams**







# The Australian Market

- We have a 52% market share of Chain Pizza\*
- 24% market share of every pizza sold\*
- We have a 8% share of Fast Food\*
- We are number 5 in fast food\*

\*DPE internal calculations and assumptions



# Domino's Continues To Take Market Share

COMPETITOR OPENINGS AND CLOSURES					Year to Date
YTD AT 20/04/2015	COMMENCING NETWORK 01/01/2015	YTD OPENINGS	YTD CLOSURES	YTD MOVEMENT	YTD NETWORK
<b>DOMINO'S NEW ZEALAND</b>	<b>87</b>	<b>2</b>	<b>0</b>	<b>2</b>	<b>89</b>
PIZZA HUT NEW ZEALAND	87	2	0	2	89
HELL PIZZA NEW ZEALAND	65	1	0	1	66
<b>DOMINO'S AUSTRALIA</b>	<b>559</b>	<b>4</b>	<b>1</b>	<b>3</b>	<b>562</b>
PIZZA HUT AUSTRALIA	310	4	11	-7	303
PIZZA CAPERS AUSTRALIA	129	2	15	-13	116
CRUST PIZZA	159	3	1	2	161
EAGLE BOYS PIZZA	162	1	6	-5	157
HELL PIZZA AUSTRALIA	1	0	0	0	1
<b>ALL MAJOR COMPETITORS YTD NZ</b>	<b>152</b>	<b>3</b>	<b>0</b>	<b>3</b>	<b>155</b>
<b>ALL MAJOR COMPETITORS YTD AUS</b>	<b>761</b>	<b>10</b>	<b>33</b>	<b>-23</b>	<b>738</b>





# DPE ANZ Store Count

Australia 562 Stores

New Zealand 89 Stores



# Strategies for Future Growth

- Moving towards a fast casual experience
- Own delivery
  - Launch of GPS driver tracker





**ALLAN COLLINS**  
Chief Marketing Officer AU &  
NZ / Group Marketing  
Director

# Brand Update







# Path to a bigger slice

- Wider customer base
- New products
- More occasions
- Internal Head Chef and development kitchen





# Domino's Technology

- Pizza tracker on your phone or smart watch
- GPS driver tracker rollout in ACT in May
- 4 click ordering
- Global collaboration with technology companies



# People Powered Pizza

- Driven by our social platforms (Australia)
  - 990k Facebook fans
  - 36.2k Twitter followers
  - 20.7k Google plus followers
  - 27.8k Vine loops
  - 4.7k Instagram friends
- Live Q&A's on social media
- Customer feedback ratings
- Live store ratings on our website
- Pizza Mogul





# Smarter & Faster

- Smarter media investment
- Faster to market our advantage





**MICHAEL GILLESPIE**  
Group Chief Digital Officer

# Digital Update







# Digital Update

- Global digital systems; shared best practise and joint development with all DPE markets
- More innovation through smarter and faster R&D
- New website and online ordering systems in development



# Digital Update

- Working on wearables
  - Android Wear and Apple Watch
- GPS Driver Tracker will enhance the customer experience and better connect Domino's and customers
- A strong focus on online advertising





# Digital Update

- Using data to help drive sales and ticket
- Testing new revenue opportunities
- Active use of social media





NICK KNIGHT  
AU & NZ Operations Manager

# Operations Update







# Operations Update

- Launch of GPS driver tracker
  - Increasing driver productivity
  - Reduction in driver incidents
  - Enhance consumer experience
  - Higher brand exposure
- GPS tracking reports on driver safety metrics including: speeding, harsh driving and vehicle maintenance



# Operations Update

- Increase electric bike fleet
- Individual employee rankings
- Store tour



