



CEOs webcast
22 May, 2019

Australia • New Zealand • Belgium • France • The Netherlands • Japan • Germany • Luxembourg • Denmark

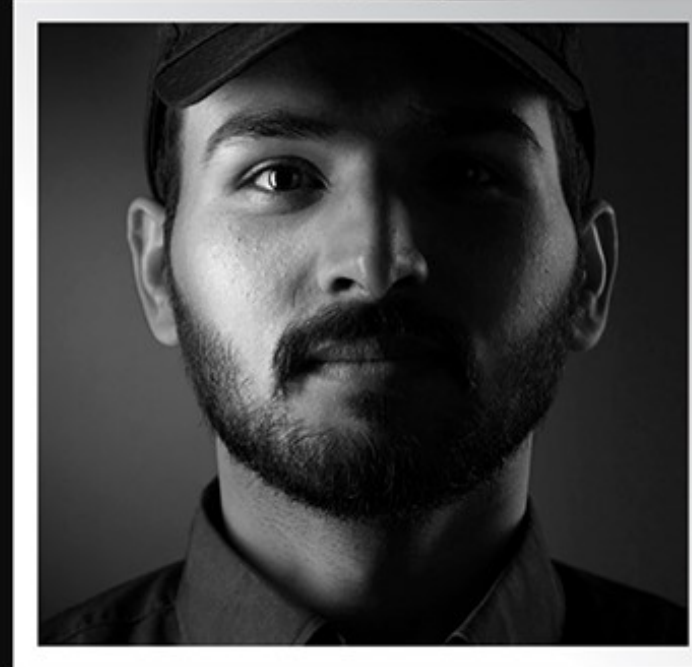
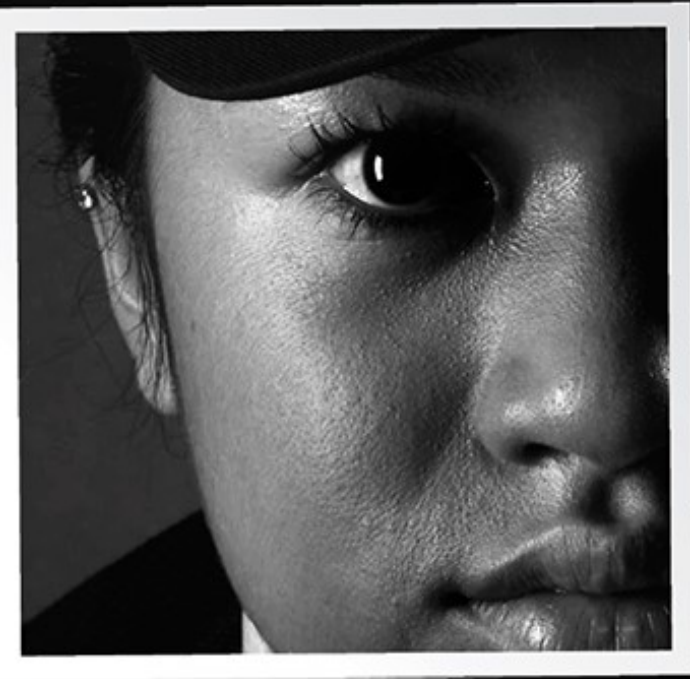


LEADING THE
INTERNET OF FOOD IN
EVERY NEIGHBOURHOOD



Introduction

Don Meij, Group CEO & MD





Don Meij
Group CEO & MD



Andrew Rennie
Europe DPE CEO



Nick Knight
ANZ CEO



Josh Kilimnik
Japan CEO

Europe

- Acquisitions and build-out strategy
- Integration of Hallo and Joey's franchisees in Germany
- Operational and marketing initiatives in France

ANZ

- Pizza Checker roll-out
- Operations 360 progress

Japan

- Barbell Menu strategy
- Employment initiatives

Europe

Andrew Rennie, Europe DPE CEO



Michael Dobson
Sunnybank Domino's



Denmark

- Planning for initial opening of 10-15 stores this Calendar Year
- Current focus on transfer/negotiation of leases, assessment of equipment/facilities, and hiring of new team members

Luxembourg

- Site identification progressed
- First Luxembourg store anticipated to open in September

Acquisitions

- Management is focused on initiatives to increase the pace of building-out existing markets, particularly through internal franchisees
- Domino's continues to examine potential acquisitions within the pizza category



DMP has revised its future store count target to 2850 stores (up from 2700)

Germany

- Conversion of Hallo Pizza stores is now complete
- 126 stores converted from Hallo Pizza to Domino's and lifted store count to 320 stores
- Conversions have been at a faster pace and higher volume than originally planned
- Our first organic stores have opened – building a strong pipeline for next year

France

- CEO Andrew Bradley is focused on improved communication with local franchisees
- A re-focus on proven marketing initiatives (including Mardi Fous) has delivered pleasing preliminary results
- Management is confident in the strategic direction, but there is more work to be done in this market



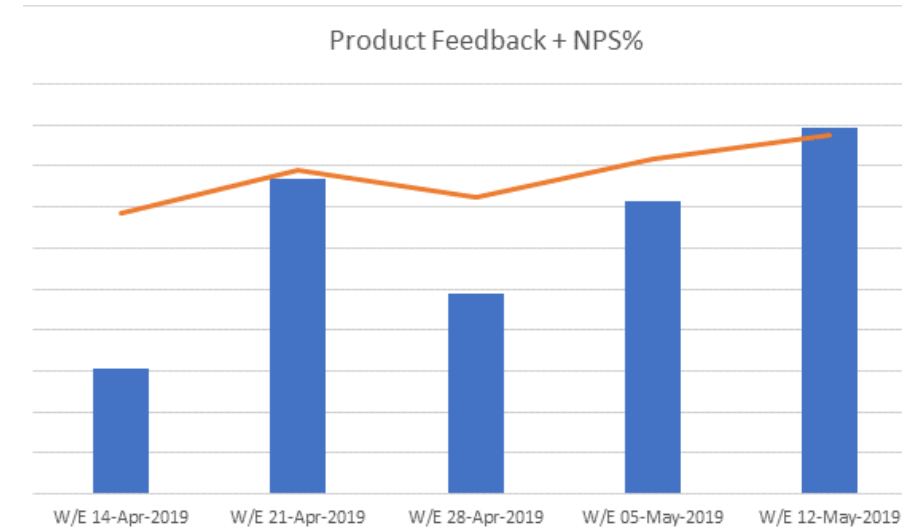
Australia/NZ

Nick Knight, ANZ CEO



DOM Pizza Checker

- Rolled out to 670 stores (remaining stores to be installed by 27 May)
- More than 1 million pizzas analysed
- Initial results showing improvements in product quality scores and NPS following Pizza Checker commissioning
- More work to be done prior to national launch next week, including in-store training



Operations 360

- In-field business consultants are using data to improve coaching and store performance
- Corporatisation of stores identified at HY results largely completed
- As a result of the above, DPE is operating a larger number of corporate stores than at the HY results - within our target highlighted at H1 19



Japan

Josh Kilimnik, Japan CEO



Barbell Menu Strategy

- The new menu options (launched April) are still in early stages
- Positive customer feedback received
- Further barbell messaging planned through the launch of new technology layer and promotion of 'Just Time Cooking'



Recent Initiatives

Management is focused on employment initiatives to remove barriers to growth including:

- Modernising maternity and paternity leave provisions
- Providing flexible working arrangements, especially for working mothers
- Actively targeting age-based wage gaps and employment differences including foreign staff



Q&A

