



Domino's Pizza Enterprises Limited  
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ACN: 010 489 326  
[www.dominos.com.au](http://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](mailto:investor.relations@dominos.com.au) or on +614 1924 3517.



# Domino's®

**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 THIJS**  
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



# Domino's®

**DOMINO'S PIZZA ENTERPRISES LTD - EUROPE  
ANDRE TEN WOLDE**

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

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# EUROPE

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

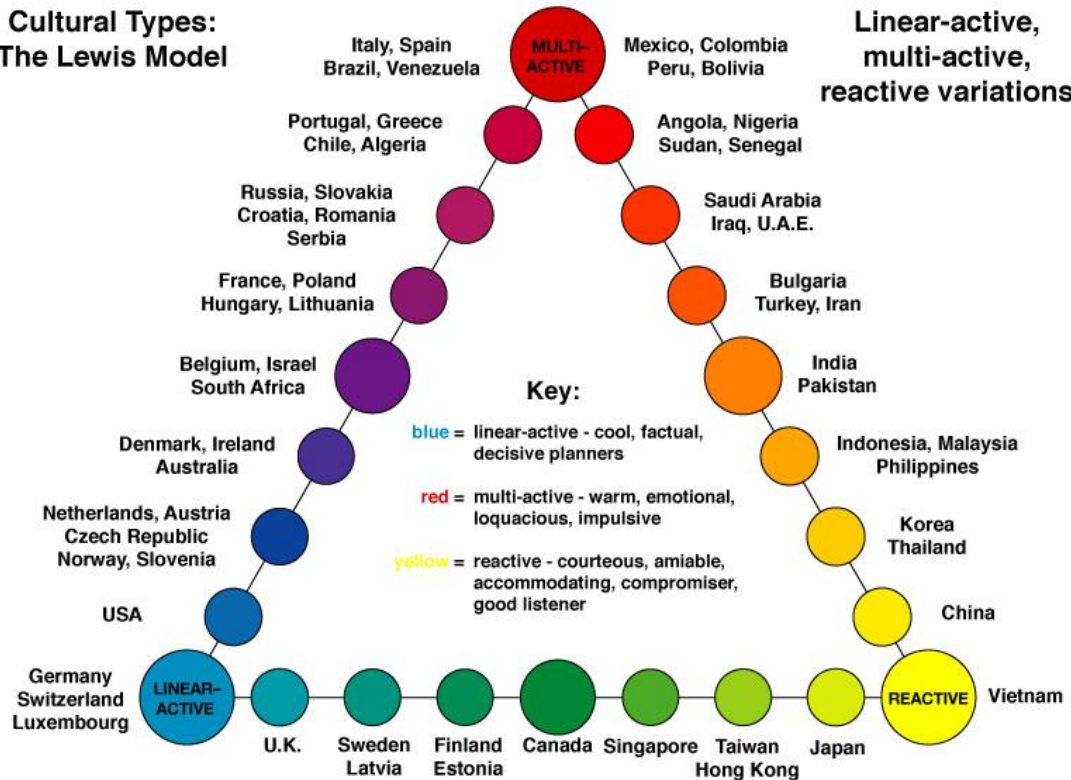


# ONE EUROPE?

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.

## 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.

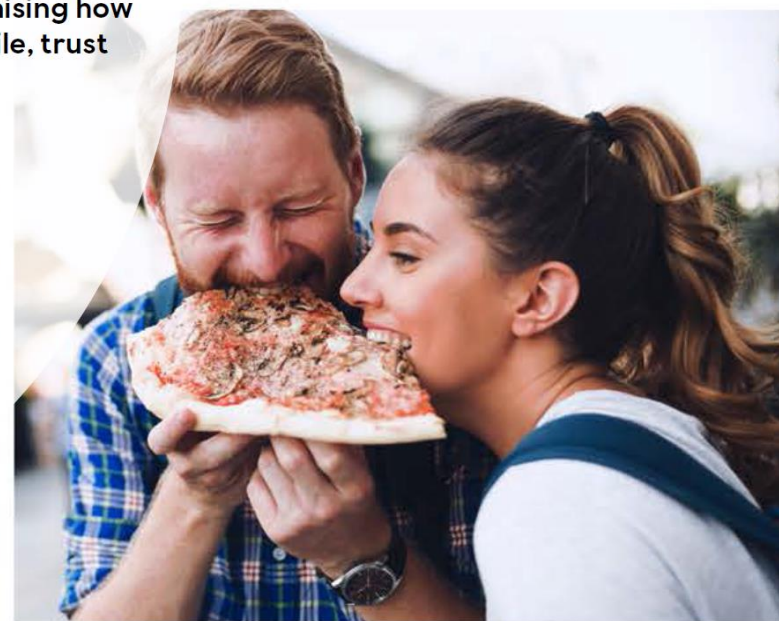
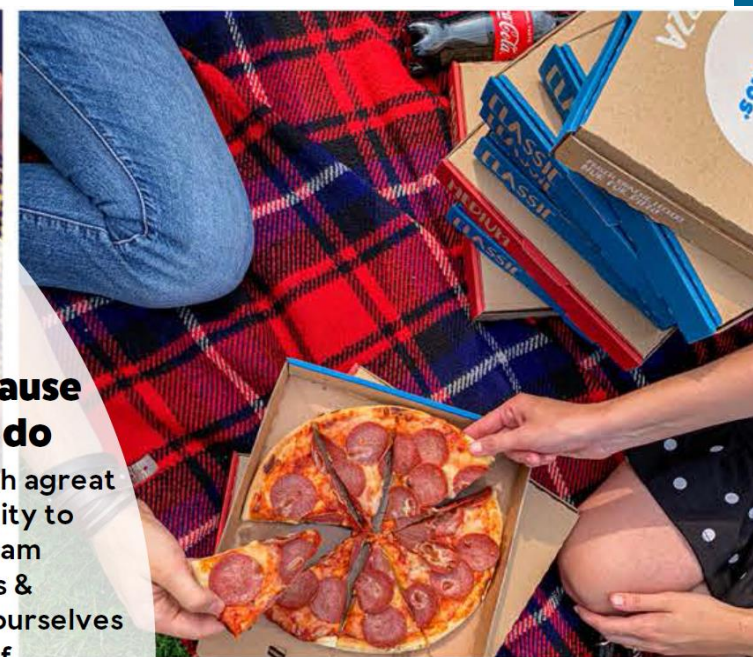
## Do the right thing because it's the right think to do

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.

## 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.

**OUR PIZZA  
BRINGS PEOPLE  
CLOSER**







# Domino's®

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

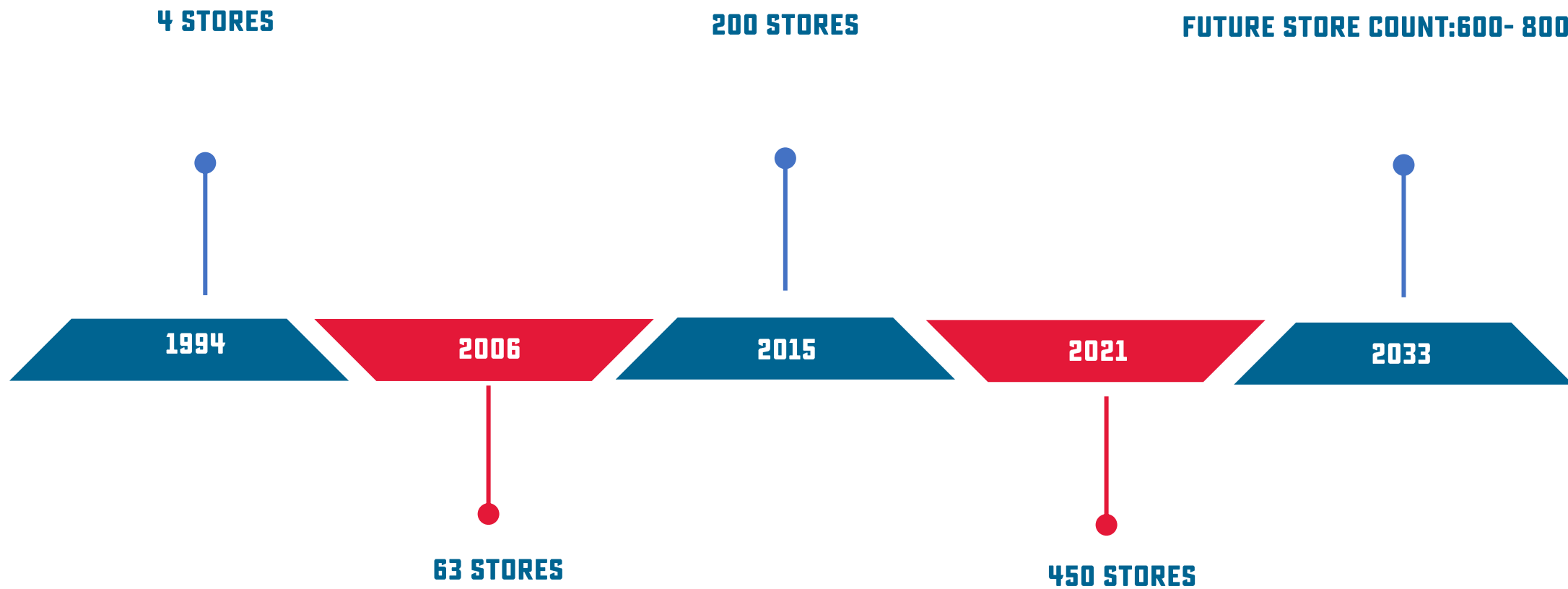
- 2006: DPE bought Domino's Netherlands and Belgium (package deal with Domino's France)
- NL was considered as a struggling market:
  - *Dutch people prefer traditional QSR like fry shops*
  - *Low AWOC and AWUS*
  - *NYP larger and faster growing competitor (75 stores in 2005)*
  - *Minimal growth in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



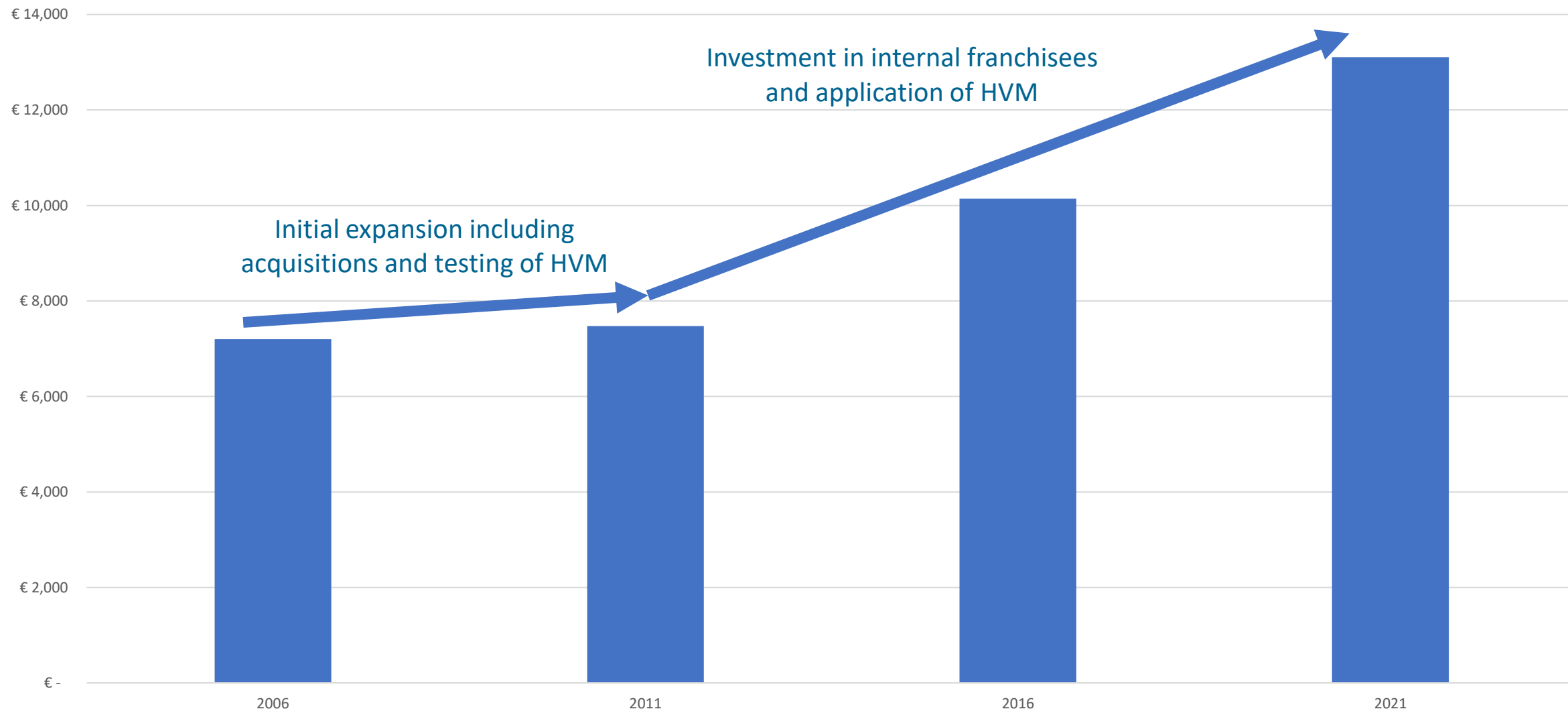
*AWOC: Average weekly order count*

*AWUS: Average weekly unit sales*

# HISTORY OF STORE GROWTH: BENELUX

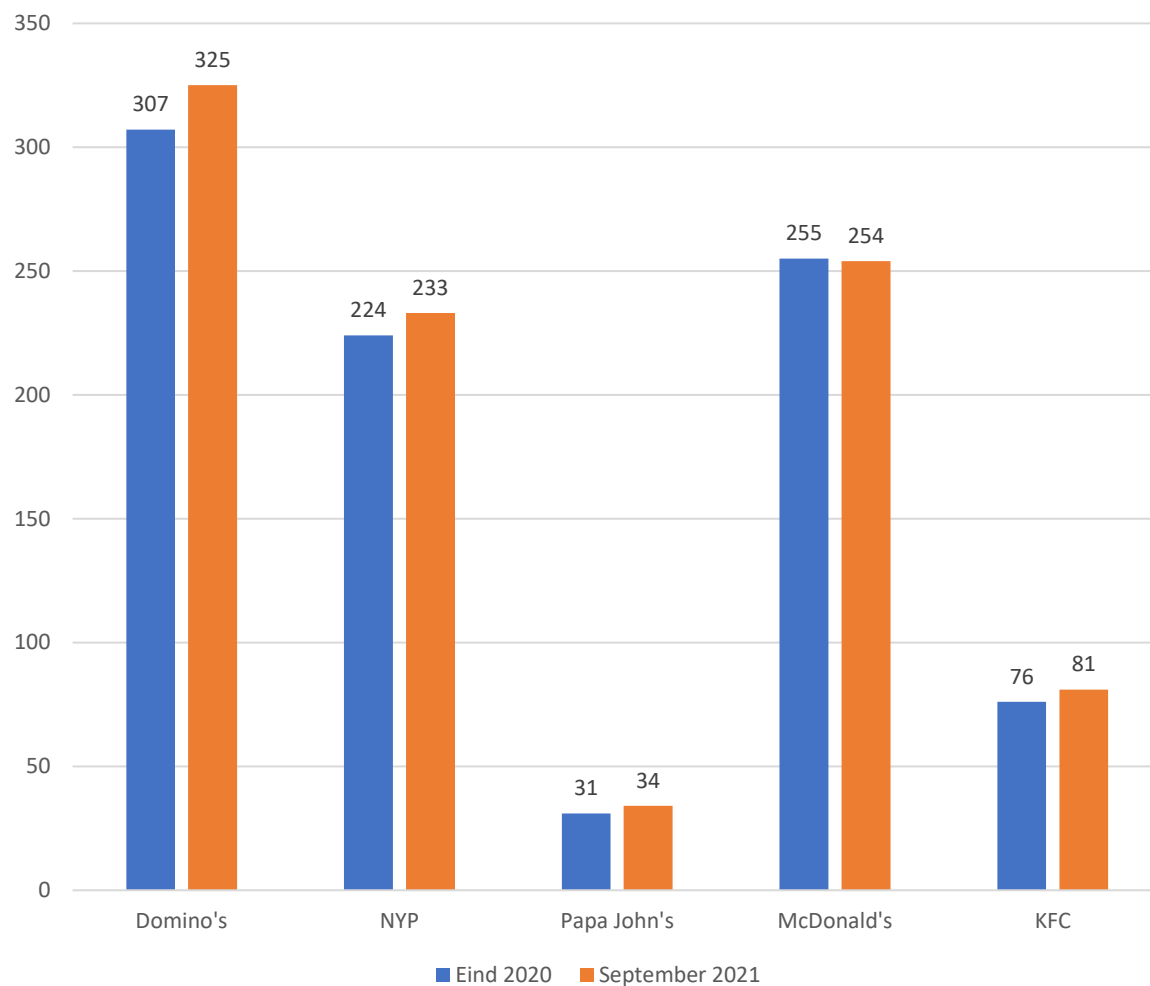


# THE NUMBERS TODAY: AWUS OVER THE YEARS<sup>1</sup>

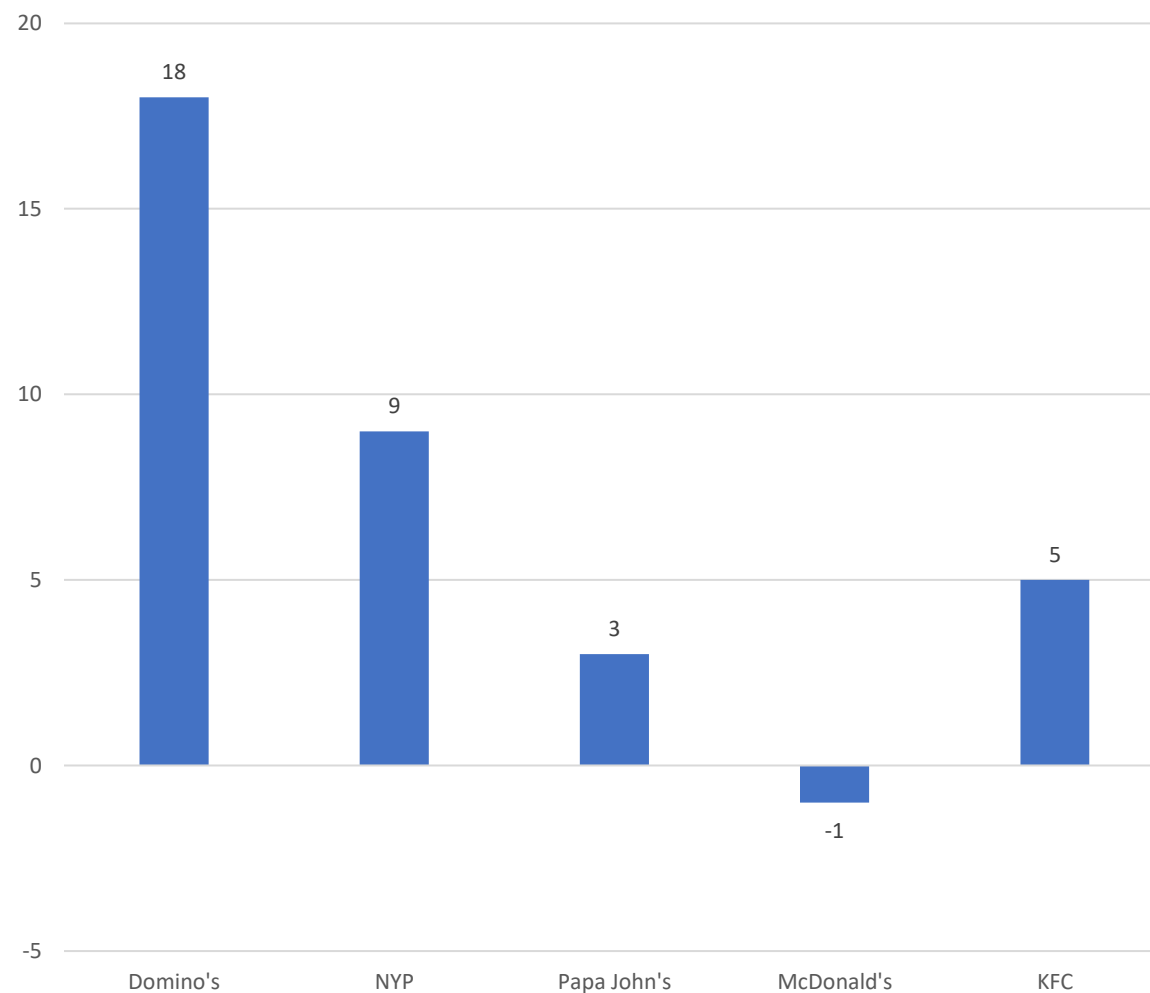


# NETHERLANDS COMPETITIVE LANDSCAPE

## 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**





# Domino's®

**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)



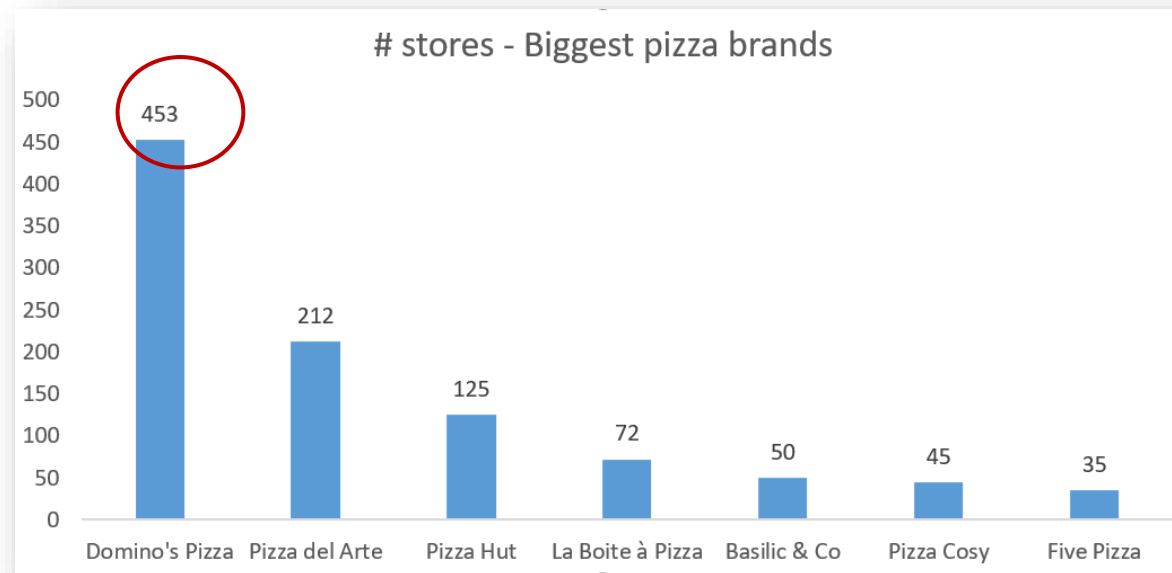
# INTRODUCING ANDREW BRADLEY

- 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



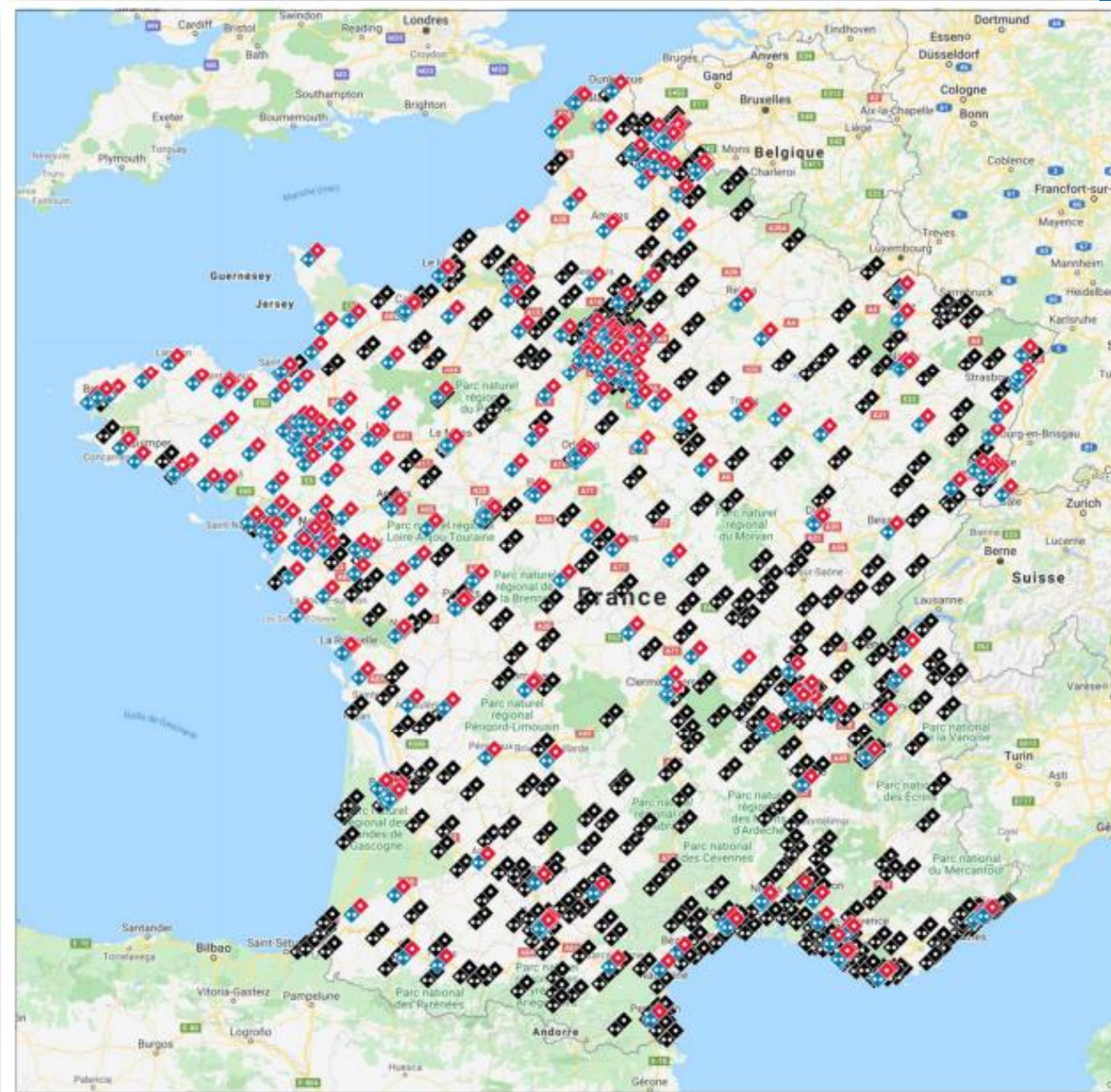
# THE COMPETITIVE LANDSCAPE

- 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

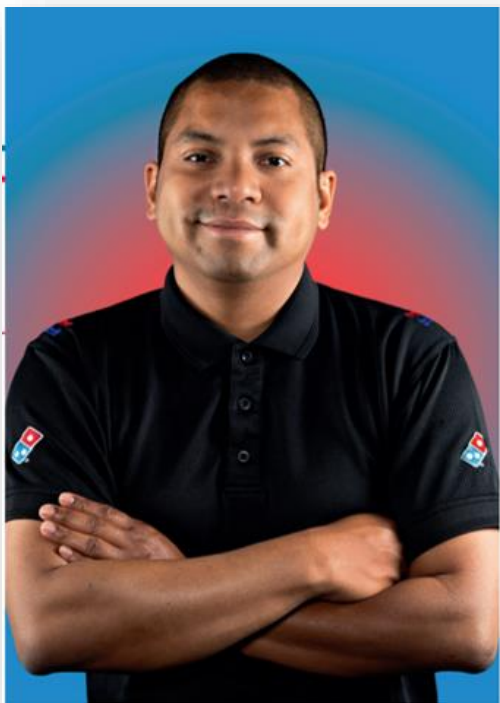
- Domino's France only cover 35% of the population
- We have mapped our potential locations for our growth milestones
- With our franchisees Domino's delivered record store openings in FY21
- Our plan is to set a new record in FY22





# 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





## CONCLUSION

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





# Domino's®

DOMINO'S PIZZA GERMANY  
STOFFEL THIJS

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

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LUXEMBOURG

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# INTRODUCING STOFFEL THIJIS

- 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





# 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**

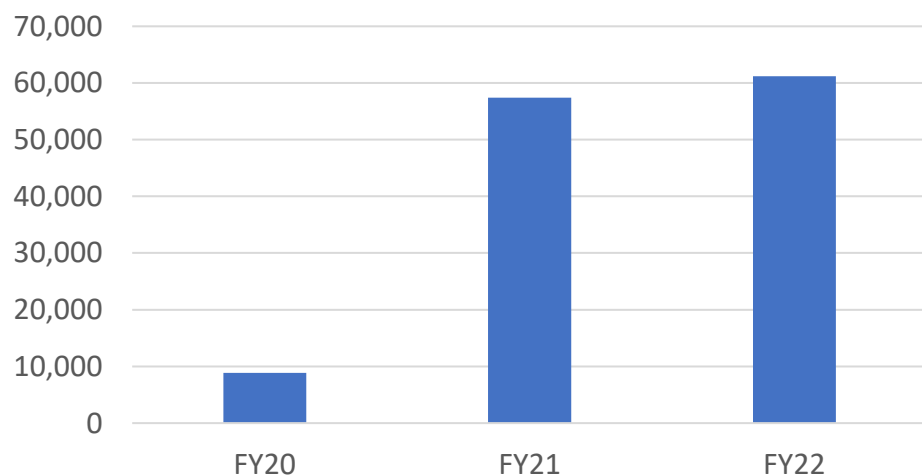


# THE IMPORTANCE OF TELEVISION ADVERTISING

- 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 Pizzabrotchen  
+ 2 x Lava Cake

↑↑↑

1€ RABATT  
auf die Pizza  
**VEGAN BBQ**

VEGANUARY

NUR AM 07.02.21 **15€** NUR

**SUPER BOWL**  
watch@home  
**DEAL**

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



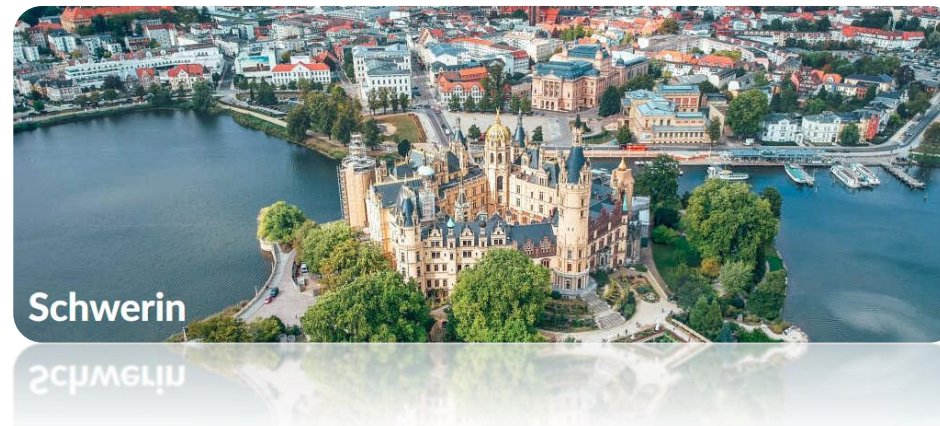
# DOMINO'S CLUB TV SPOT





# 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

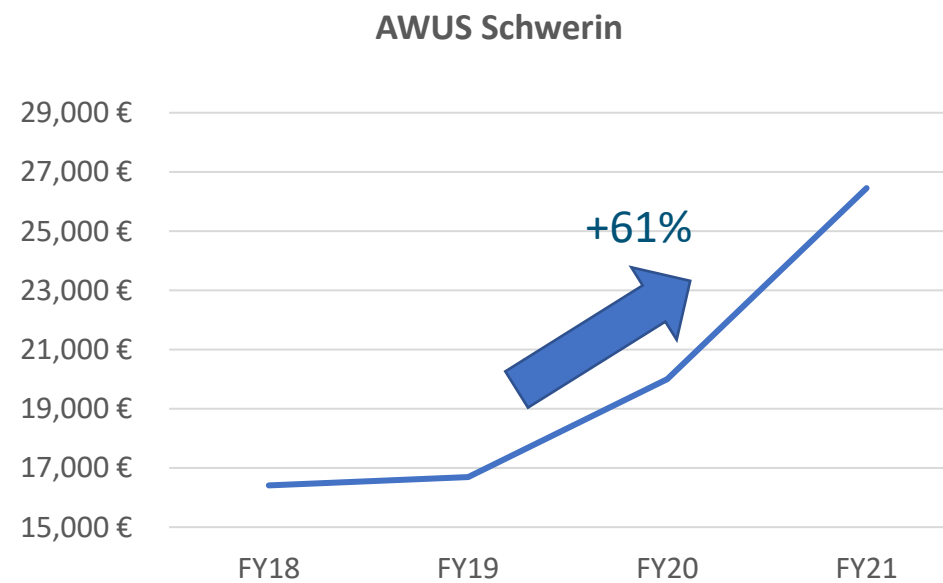


| FY 18            |                 |                     |
|------------------|-----------------|---------------------|
| Store Name       | AWUS            | AWUS per Inhabitant |
| Schwerin Dreesch | 17.886 €        | 0,53 €              |
| Schwerin Nord    | 15.541 €        | 0,47 €              |
| Schwerin Stadt   | 15.821 €        | 0,74 €              |
| <b>Gesamt</b>    | <b>16.416 €</b> | <b>0,19 €</b>       |

| 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 €              |
| <b>Gesamt</b>    | <b>20.003 €</b> | <b>0,23 €</b>       |

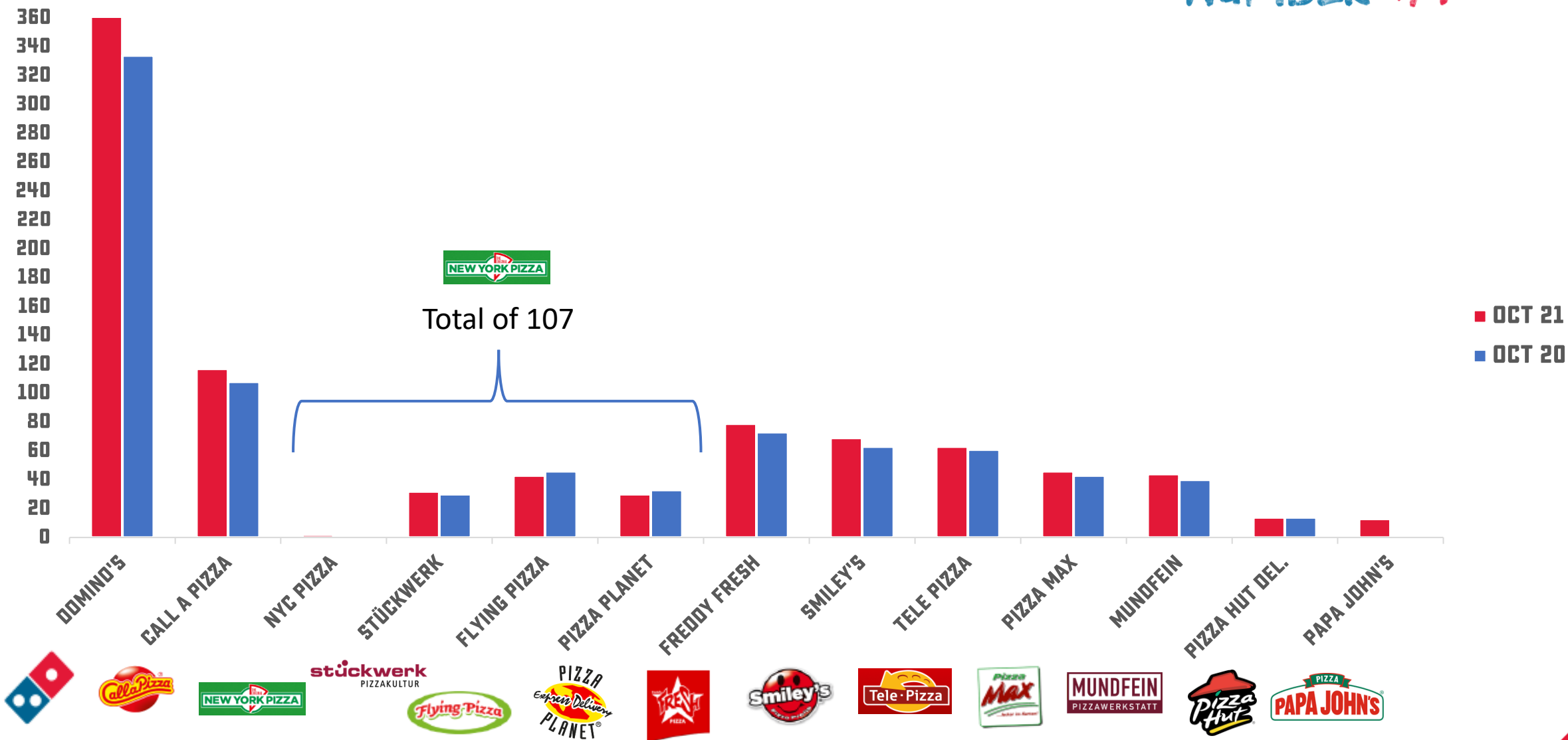
| FY 19            |                 |                     |
|------------------|-----------------|---------------------|
| Store Name       | AWUS            | AWUS per Inhabitant |
| Schwerin Dreesch | 18.975 €        | 0,56 €              |
| Schwerin Nord    | 15.685 €        | 0,47 €              |
| Schwerin Stadt   | 15.430 €        | 0,72 €              |
| <b>Gesamt</b>    | <b>16.697 €</b> | <b>0,19 €</b>       |

| 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 €              |
| <b>Gesamt</b>    | <b>26.456 €</b> | <b>0,30 €</b>       |



# GERMAN COMPETITOR OVERVIEW

**WE ARE  
NUMBER #1**



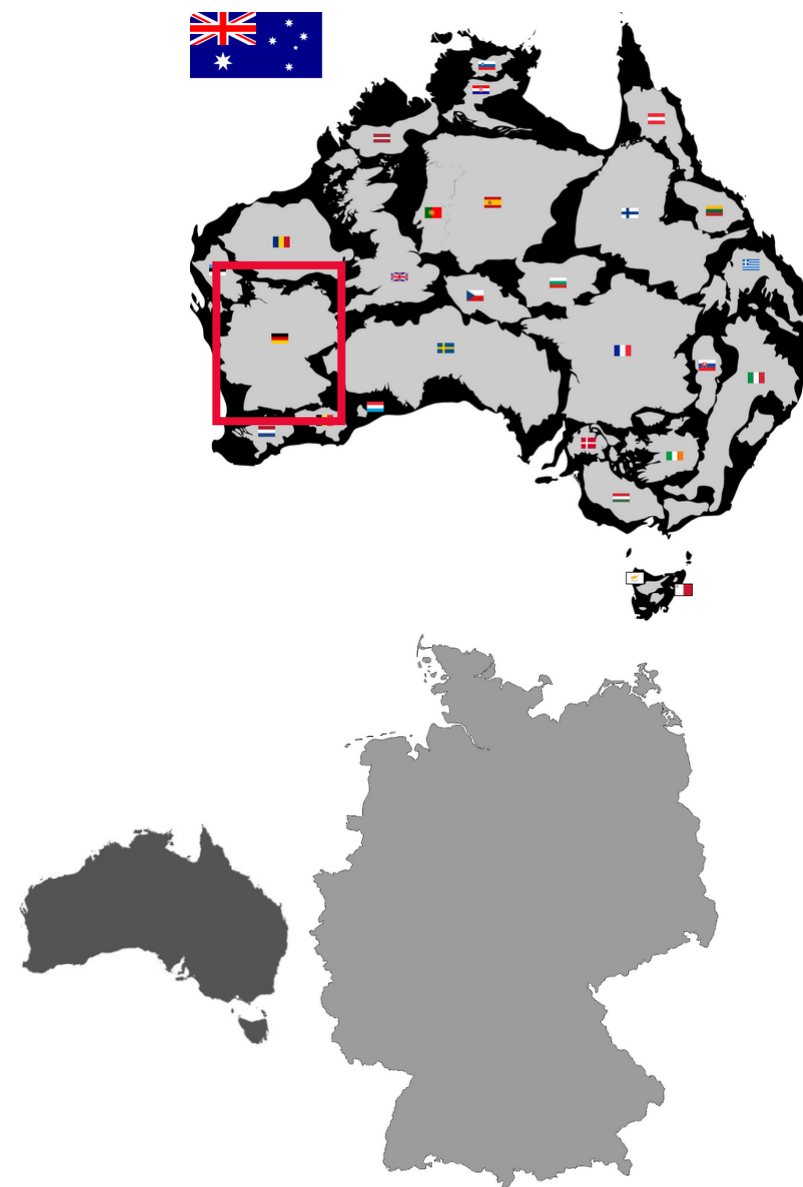
# THE REGIONAL DEVELOPMENT APPROACH



# 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 <sup>2</sup>         | 357.580    | 7.741.220  |
| Inhabitants                     | 83.093.000 | 25.366.000 |
| Inhabitants per km <sup>2</sup> | 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





# Domino's®

**DOMINO'S PIZZA DENMARK  
KELLIE TAYLOR**

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

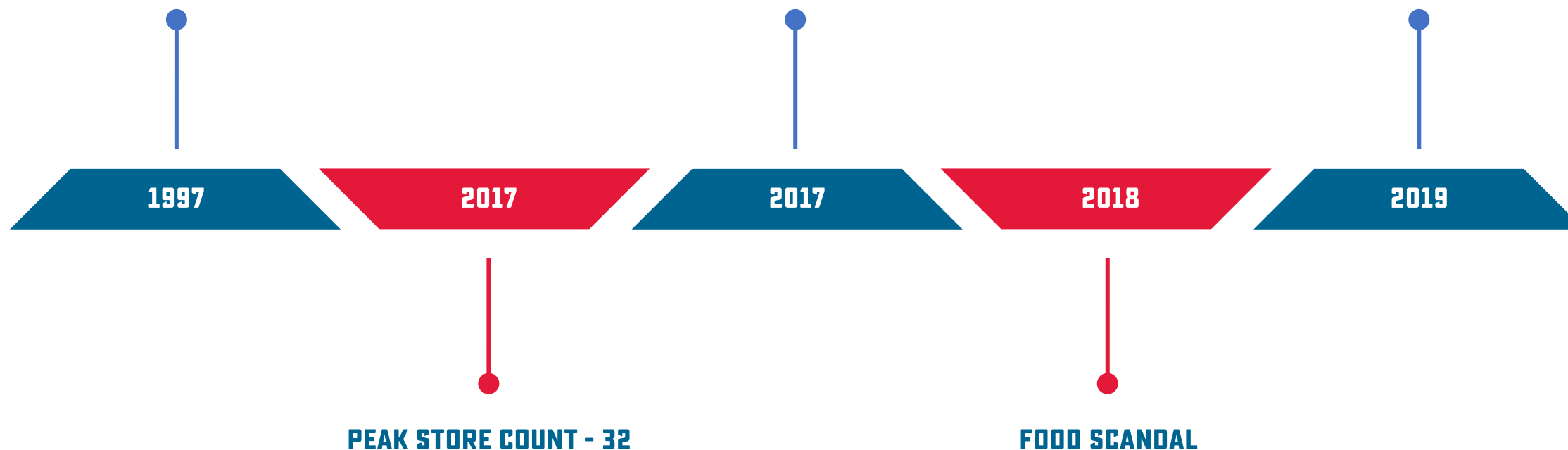
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# NOT YOUR AVERAGE MARKET

FIRST DANISH STORE OPENS

DPE STARTS NEGOTIATING TO BUY

BUSINESS INSOLVENT - DPE BUYS MARKET





# 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



AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK





# Domino's®

## DOMINO'S PIZZA ENTERPRISES LTD - SUPPLY CHAIN JOHN HARNEY

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

JAPAN

GERMANY

LUXEMBOURG

DENMARK

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# 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



**SAFETY**



**ZERO INTERRUPTION**



**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





# Domino's®

**DOMINO'S PIZZA ENTERPRISES LTD - EUROPE  
ANDRE TEN WOLDE**

AUSTRALIA

NEW ZEALAND

BELGIUM

FRANCE

THE NETHERLANDS

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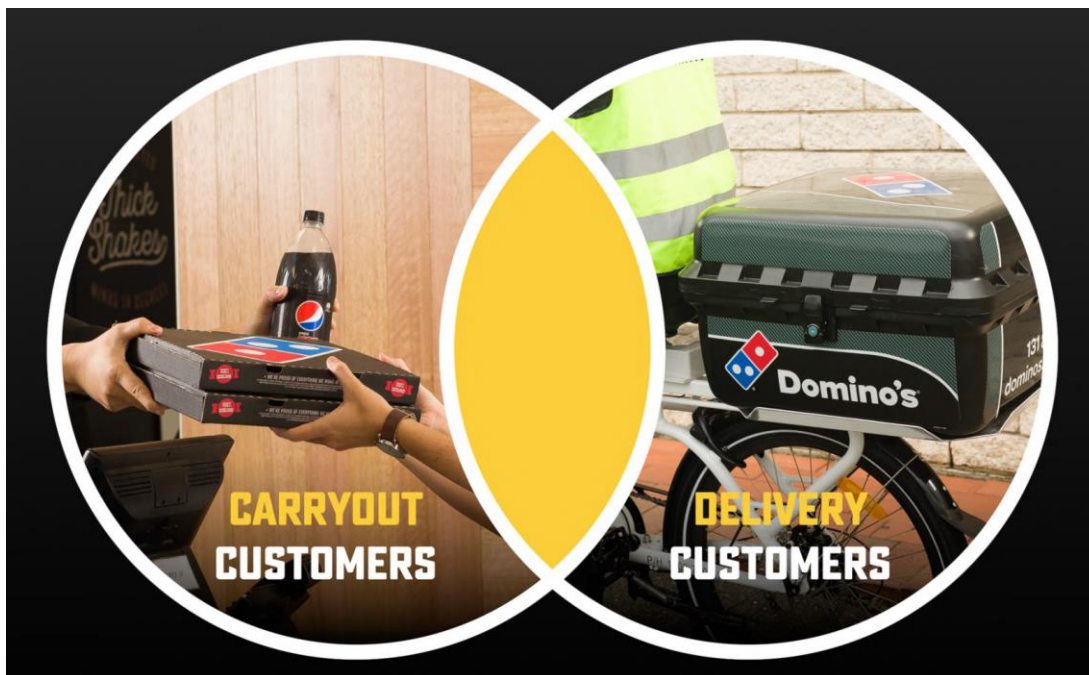
DENMARK

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:

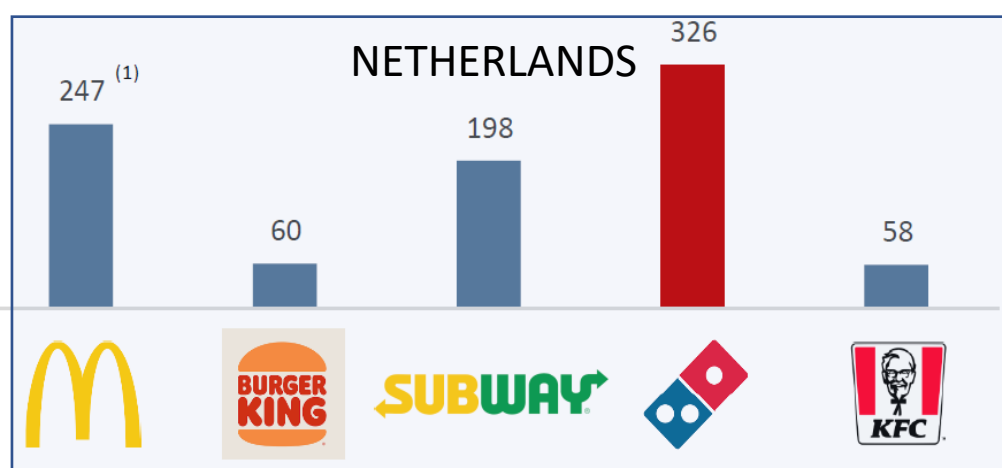
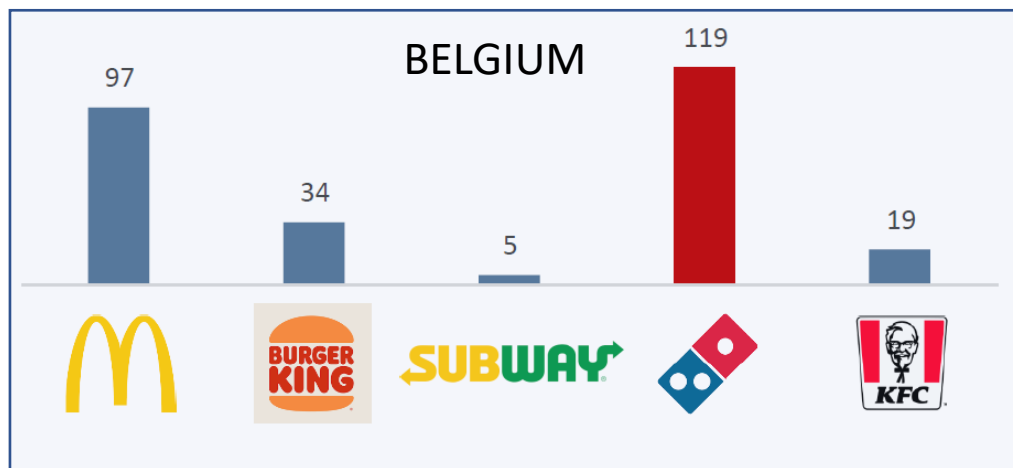
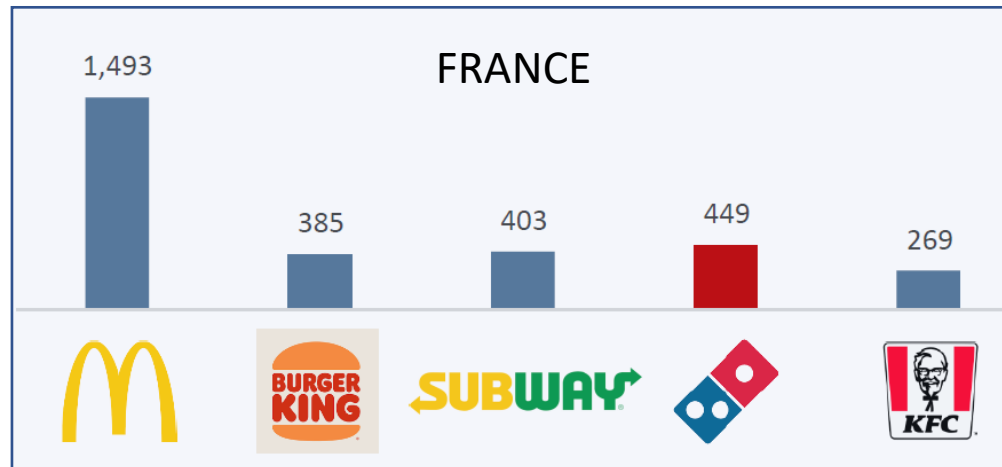
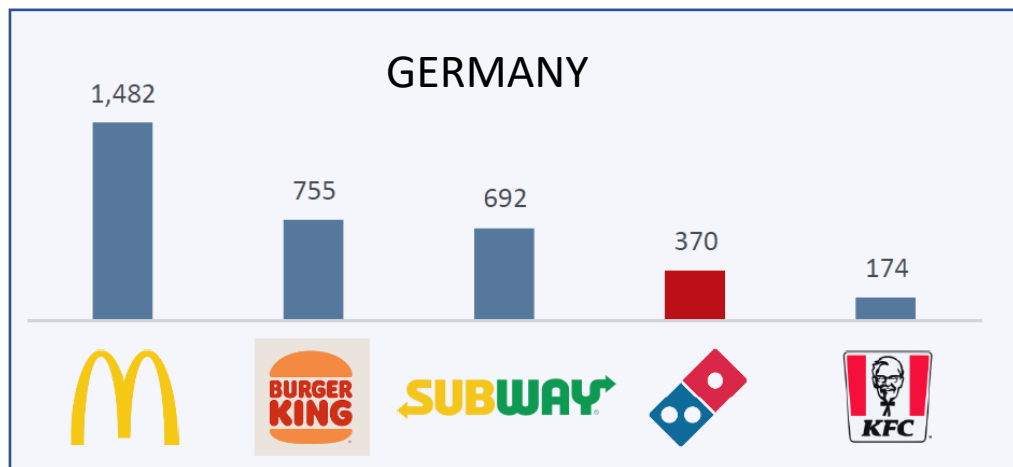
11,806 stores

**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)  
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