



## THE MARKET

People love pizza. Gathering around their favourite flavour combination to communicate, connect and enjoy food and fun together has become one of the last remaining social glues of our time.

The power of pizza is something no brand understands better than Australian owned and operated Domino's Pizza Enterprises and its more than 915 stores. Since its inception, Domino's Pizza - a global brand founded by Thomas and James Monaghan in 1960 in the United States - has become the recognised leader in pizza delivery, operating a network of over 10,000 stores in more than 50 countries.

Dotted across Australia, New Zealand, France, Belgium and the Netherlands, Domino's Pizza Enterprises and its franchisees employ more than 21,000 casual and full-time staff, making more than 60 million pizzas each year. As the

number one pizza brand in Australia, Domino's is committed to further developing its competitive edge to ensure it remains at the top of the market - claiming 45.1% share of the entire category in Australia, with strong penetration and growth in all other markets it operates in:

- ▶ 33.6% in New Zealand
- ▶ 29.6% in The Netherlands
- ▶ 24.2% in France
- ▶ 14.4% in Belgium

Data is from the 'Chained 100% Home Delivery/ Takeaway' Euromonitor Report May 2011

Domino's has delivered and continues to expand on a series of products and innovations, which have revolutionised the Australian pizza industry and more recently the e-commerce space.

## ACHIEVEMENTS

Domino's was the first brand in Australia to introduce home pizza delivery in 1980 - a popular

concept that soon prompted competitors to follow suit.

Once home delivery became the norm, the brand introduced the innovative Hot Cell Bags in 2000 to further differentiate itself from its competition, ensuring Domino's pizza was delivered up to 20 per cent hotter.

Designed to fill the gap between Deep Pan and Thin 'n' Crispy bases on their menu, Classic Crust was introduced in 2002 by Domino's CEO Don Meij.

This was followed in May 2005, with Domino's being the first Australian pizza maker to list on the Australian Stock Exchange - a move which helped to spur the brand's expansion into new markets, including New Zealand and Europe.

Pioneering online and mobile ordering (Domino's customers can now order their pizza from one of seven dedicated platforms) more than 50% of sales are made online - mobiles accounting for 40% - and an increase of online sales to 80% being predicted within the next three years.

In March this year, Domino's launched the World's first 'Social Pizza' on its Facebook page - the application allowing fans to build a custom-made pizza from the menu, with the most popular selection each day being added to it.

The popularity of this led to Domino's becoming the first pizza company in the world to offer Facebook ordering in May 2012, featuring a live Pizza Tracker, via a dedicated app on its Australian and New Zealand Facebook pages.

In 2012, Domino's redeveloped its famous Classic Crust in the Company's biggest product improvement in recent years.

Internally the brand is just as active, with 'The Partners Foundation' being the company's staff charity, assisting team members in times of tragedy. To date the foundation has donated more than \$450,000 to hundreds of team members who have fallen on hard times.

## HISTORY

On 27 December 1983 the first Domino's Pizza





store opens in Springwood, Queensland becoming the first pizza maker in Australia to offer home delivery.

Four years later in March 1987 the influential Don Meij starts working at Domino's Pizza as a delivery driver in Redcliffe, Queensland.

In 1995 the company acquires and rebrands Silvio's Dial-A-Pizza and establishes 'The Partner's Foundation'.

Frequent product and service innovations quickly become the brand's trademark and over the next decade benchmarks the business's growth and retail outlet expansion.

Having being named Chief Executive Officer of Domino's Pizza Enterprises in 2002, Don Meij leads the way for the company to be successfully listed on the Australian Securities Exchange in 2005. In the same year, Domino's opens the Luv Lab - the brand's central product development kitchen in its head office in Brisbane, Queensland.

As 2005 draws to a close, Domino's launches Australia's first online ordering website, with technology that allows customers to view, order and track the progress of their pizza order in real time on the Internet.

2008 is another big year for the brand – celebrating 25 years of selling pizza in Australia and launching its unforgettable 'Techno Chicken' marketing campaign, which now has over 1 million YouTube views. In 2009 it launches the Choc Lava Cake – it's most decadent dessert yet,

The list of exciting menu options, value-adds and technology driven customer service applications roll out thick and fast over the next four years:

- November 2009 – Domino's launches its Online Ordering iPhone Application, which becomes the number one free application on iTunes within five days.

- February 2010 – Domino's launches its Good Choice Range, consisting of nutrition conscious calorie-controlled meals.

- October 2010 – Domino's CEO Don Meij appears on the premiere episode of Undercover Boss Australia.

- May 2011 – Domino's launches its Online Ordering Mobile Website.

- September 2011 – Domino's launches its

Online Ordering Android Application.

- October 2011 – Domino's Pizza Australia celebrates 200,000 Facebook fans.

- January 2012 – Domino's gives all its Facebook fans a free Choc Lava Cake.

- May 2012 – Domino's launches new Classic Crust.

- September 2012 – Domino's launches a dedicated iPad app featuring 'Pizza Chef'.

### THE PRODUCT

Constant product development and consistent quality is what sets Domino's apart from its competitors, with the brand improving a significant number of ingredients, pizzas, sides and desserts in the last year alone.

However, the biggest core product improvement was achieved when it launched the new Classic Crust in May 2012. Made with baker's flour and semolina the product is crispy outside with a fluffier inside.

Domino's continues to provide customers with innovative new products - refocusing on core products, improving its most popular pizzas and delivering customers greater value.

Today though, consumers actively search for healthier food options. Without compromising on taste Domino's has reduced the salt and fat content of its pizzas by as much as 30%, and increased the fibre content in its dough. The brand has also developed a dedicated website dominos.com.au/insidedominos to inform its customers of the improvements being made.

The development of the Good Choice Range of full size pizzas offering customers healthier pizzas and greater choice in June 2012 is a popular response to this trend. Consisting of two layers - each with a different appeal to health-conscious pizza lovers - the new range contains fat free and low carb options.

### RECENT DEVELOPMENTS

Domino's has managed to maintain its innovative and unique culture through significant advancements in its core product to keep up with technology and society's increasing health consciousness.

As such the brand is proud to be one of the leaders in social media innovation, giving customers the freedom to order the way they want. This year Domino's added an Android app, iPad app and Facebook ordering to its digital platform and launched an improved version of the successful iPhone app.

Domino's 'Social Pizza' - a world first launched on Facebook page - gives fans the opportunity to connect with the brand as well as each other like never before – building 'Social Pizza' together. This year Domino's unveiled the 'Fan Favourite' pizza on the Domino's menu nationwide.

### PROMOTION

Domino's is one of the most recognised brands in Australia - its catchy tagline 'It's All Good' firmly etched in the minds of Australian pizza lovers thanks to a series of television advertisements and local store marketing. Strong direct mail ensures that households are regularly informed of new products and offers, keeping Domino's top of mind. The 'Theatre of Food' store opened on the Gold Coast in February 2012 is the first of its kind - incorporating a specially designed dough room,

open plan make line and dramatic cut bench, and features in-store and outdoor seating for up to 100 customers.



Domino's new chalkboard design encompasses the company's love of great food and its focus on quality ingredients. The hand-drawn features and rustic tones in its TV commercials and leaflets represent its commitment to handmade dough pizzas that are prepared fresh for every order, while the use of key ingredients and product features are used to entice the pizza-loving public.

### THINGS YOU DIDN'T KNOW ABOUT DOMINO'S PIZZA

- In 2012 Domino's created the first social media pizza with its Facebook fans
- Domino's was the first Company to appear on Undercover Boss Australia in 2010.
- Domino's CEO Don Meij started as a pizza delivery driver and in 2012 celebrated 25 years with the Company.
- Domino's sells more than 60 million pizzas a year.
- In 2011, Domino's Belconnen in the ACT was the busiest store in the world, selling more pizzas than any other Domino's store globally.
- Domino's Australia is the largest Fast Food brand on Facebook (Australia).
- In January 2012 Domino's Bundaberg broke the record for 'Most Pizzas Made in One Hour by a Team' by making 837 pizzas in 60 minutes.
- On 16 June 2012 Domino's Bundaberg took out its second worldwide record for 'Most Pizzas Made in 24 Hours by a Team' by saucing, topping, cooking and cutting 7,539 pizzas – 7 pizzas a minute!
- As at October 2012, 50% of Domino's sales are made online, with 40% of these coming from mobile devices.