Domino's Benchmark Report

Executive Summary
Domino's is very well positioned as the largest US pizza chain (#1 delivery - #2 carryout) with a commanding 29% share of the pizza delivery market vs. 28% for the other big 3 chains combined and 43% for regionals & independents. The brand's strategy is to improve every aspect of its customer experience with leading-edge, digital ordering convenience, seamless payments and attractive every-day pricing. Its impressive 60%+ digital sales mix benefits from an extensive AnyWare ordering platform which generates digital orders that drive: higher tickets (less coupons & more add-ons); increased frequency & retention with an improved customer experience; greater order accuracy; and re-ordering ease. Plans to get to 100% digital ordering (including digital voice) will free-up staff to focus on further improving the customer experience rather than order taking. A menu broadened with attractive add-on options to its core pizza orders (i.e. salads, chicken, stuffed cheesy bread and desserts) helps increase check while oven baked sandwiches and pastas better address lunch. Domino's marketing benefits from extensive customer data capabilities generated by its online order platform and extensive use of social media marketing which provides the ability to track and analyze customers' purchasing habits used to customize loyalty awards such that its successful Piece of the Pie Rewards loyalty program can effectively drive traffic growth. Reimaging and relocation initiatives help the brand to better address its low price point carryout business and also helps with its delivery image. Taken together, the chain's strong brand positioning is reflected by nearly +40% stacked 4-year comps through 2017 and it is notable that its +3% to +6% annual comp outlook for next 3 to 5 years suggests expectation that sales will eventually revert to the mean (a function of the law of large numbers). **In conclusion, Domino's story is a real 21st century tale of how to an iconic brand is applying digital and big data to create an edge in providing convenient access of an affordable staple to American consumers who never grow tired of their pizzas.**

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