Tim McIntyre

EVP, Communication & Investor Relations
These statements may relate to future events or our future financial performance and are subject to known and unknown risks, uncertainties and other factors that may cause our actual results, levels of activity, performance or achievements to differ materially from those expressed or implied by these forward-looking statements. This presentation and our accompanying comments do not purport to identify the risks inherent in an investment in Domino’s Pizza and factors that could cause actual results to differ materially from those expressed or implied in the forward-looking statements. These risks include but are not limited to those risk factors identified in Domino’s Pizza, Inc.’s Annual Report on Form 10-K for the fiscal year ended January 1, 2017, as well as other SEC reports filed by Domino’s Pizza, Inc. from time to time. Although we believe that the expectations reflected in the forward-looking statements are based upon reasonable estimates and assumptions, we cannot guarantee future results, levels of activity, performance or achievements. We caution you not to place undue reliance on forward-looking statements, which reflect our estimates and assumptions and speak only as of the date of this presentation and you should not rely on such statements as representing the views of the Company as of any subsequent date. We undertake no obligation to update the forward-looking statements to reflect subsequent events or circumstances. In light of the above, you are urged to review the disclosures contained in the Domino’s Pizza, Inc. SEC reports, including the risk factors contained therein.

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Patrick Doyle
CHIEF EXECUTIVE OFFICER
“DISRUPTORS”

The word of the past few years... with good reason

5 Major Industries And Their Next-Gen Disruptors

McDonald's CEO: 'We want to be the disrupter' when tech threatens the restaurant industry

Airbnb CEO speaks on disrupting hotel industry

Is the Restaurant Industry Amazon's Next Target?
In our industry, DPZ has always been a disruptor
From the beginning, when we did everything we could to be the leaders in delivery…
...to today, when we are now the leader in technology, innovation and total pizza market share
DOMINO’S IS #1 IN U.S. DOLLAR SHARE

NPD QSR Pizza Dollar Share

Next nearest competitor: 13.9%

Source: The NPD Group/CREST® through quarter ending September 2017
U.S. GROWTH CONTINUES TO BE BEST IN CLASS

Top 10 QSR Brands Average Same Store Sales
2010-Q3 2017

Source: Technomic Top 10 Public QSR companies
Comparable calendar quarters (SBUX)
Results: Company filings and Bloomberg
DOMINO’S USA IS THE DOMINANT #1 IN PIZZA DELIVERY

NPD QSR Pizza Delivery Dollar Share

Next nearest competitor: 13.8%

Source: The NPD Group/CREST® through quarter ending September 2017
OUR INTERNATIONAL SHARE IS GROWING

DPI Total Pizza Market Share

2015
- Market Size: $88B
- DPI Sales: $5.0B*

2016
- Market Size: $88B
- DPI Sales: $5.6B

Note: market sizes impacted by FX rates
*Based on 52 weeks
Our plan for today: share the

Overall Strategic Intent

behind everything we’ve done; are doing
FIRST PRIORITY

We reinvented our core pizza
We expanded and improved the rest of our menu
SECOND PRIORITY

Reimage our stores to be attractive to carryout customers
CARRYOUT MUCH BIGGER THAN DELIVERY

Pizza Occasions

Source: The NPD Group/CREST® Year Ending September
CO = Carry Out and DT = Drive Thru
CARRYOUT SHARE IS GROWING RAPIDLY

NPD QSR Pizza Carryout Dollar Share

Segment Leader: 16.6%

Source: The NPD Group/CREST® through quarter ending September 2017
Includes carryout and drive-thru
STORE GROWTH KEY IN CARRYOUT OPPORTUNITY

Carryout requires us to be closer to those customers, so we need more stores
FOCUS: DRIVING SALES FROM 2 DIFFERENT SOURCES

Domino’s International Retail Sales Growth

- Sales from New Stores
- Same Store Sales

Note: 2015 excludes impact of the 53rd week; Constant dollar basis to exclude FX impact
FOCUS: DRIVING SALES FROM 2 DIFFERENT SOURCES

Domino’s Domestic Retail Sales Growth

Note: 2015 excludes impact of the 53rd week
Aggressive investment in building digital platforms and data analytics in-house
We know who our customers are
We know what they eat
We know which device they prefer
We know where they receive their messages
We know what changes their purchase behavior
WE DON’T INVEST LIKE OTHER BRANDS
WHAT DOES THAT MEAN?

Very different approach to the budget process
How much do we think we will grow?
How much can we afford to spend?
Can we try some new things?
We look at the expected value of projects, including the risk, and will place lots of bets.
Whether capital or expense, we look at cash invested, what success would look like to shareholders, and the odds that the investment will be successful

SIMPLE, BUT EFFECTIVE
SIMPLE, FLEXIBLE, DISCIPLINED

= 

A COMPETITIVE ADVANTAGE
They invest differently – and heavily – too

They are the ones...

Reimaging & relocating stores
Splitting delivery areas to build more stores

Why? Each is returning strong ROI for them
WE’RE #1 – BUT WE’RE NOT FINISHED!

Next Goal: Dominant #1 within the next decade
Global pizza industry is big and it’s growing

That’s a good thing!

It’s also incredibly fragmented

That’s also a good thing!

So…where do we go from here?
DOMINANT #1 – WHY IS THAT IMPORTANT?

Scale Matters
Supply Chain
Advertising
Talent
Technology
Service
DOMINANT #1 CREATES A VIRTUOUS CYCLE

Winning in every neighborhood and market

Driving the best unit and franchisee economics

Attracting more investment from our franchisees and master franchisees

Leveraging our scale at the enterprise level

Generating best in class returns for our shareholders
DOMINANT #1 – HOW DO WE GET THERE?
DOMINANT #1 STARTS WITH A SOLID FOUNDATION, BUILT OVER THE LAST TEN YEARS

Single POS system

A-B-F franchise rating system; protect brand standards

Reinvent the menu

Reimage the stores

Double down on in-house technology, analytics
Of course, it all starts with the best food
Leading, innovative technology
World-class supply chain system
Best-looking, best-operating stores anywhere
Strong franchisees that want to grow
Fortressed markets
New & Inspired launched the US turnaround, but we haven’t stopped there

- 85% of the menu is new since 2010
- Continuing to improve our ingredients

Food innovation is happening all over the world

- “Taste the Colour” in Australia
- Artisan line in Spain
- New sandwich line in Japan
- New & Inspired line in India
LEADING, INNOVATIVE TECHNOLOGY: WE BEGAN BY MANDATING A SINGLE POS SYSTEM IN THE U.S.

POS system essential for all innovation

Deployed in 100% U.S. stores; 6,607 stores outside U.S.
LEADING, INNOVATIVE TECHNOLOGY: EARLY INNOVATION

POS system led to….

Pizza Profiles, which led to…

My Easy Order, which led to…

Anyware Platforms, which led to…

Piece of the Pie, the easiest loyalty program to join, which led to…
LEADING, INNOVATIVE TECHNOLOGY: PIECE OF THE PIE LAUNCHED IN 2015

15 MILLION active users, which we believe is the largest active loyalty program in QSR

Loyalty launched in Canada: 1.2 million active users to date

Active User defined as having order in past six months.
LEADING, INNOVATIVE TECHNOLOGY: DPZ ALSO PIONEERED VOICE ORDERING IN 2014

Not a PR stunt: It’s the Future
Amazon launched Alexa with Dom
Google Home launched with Dom

Natural voice will be critical
We will continue to invest in this area
LEADING, INNOVATIVE TECHNOLOGY: A GLOBAL SYSTEM OF INNOVATORS

DPG was first to market with online ordering

DPE in Australia testing 10-minute delivery;
3-minute carryout

Merely *trying* is making us all better

DPE pioneering robot & drone deliveries
WORLD CLASS SUPPLY CHAIN: INVESTING HEAVILY TO SUPPORT SYSTEM GROWTH

Our system is also investing in the supply chain systems necessary to achieve Dominant #1:

Edison, New Jersey
Noida, India
Warrington, UK
Mexico City, Mexico
Milan, Italy
Lodz, Poland
Lisbon, Portugal
**BEST LOOKING, BEST OPERATING STORES:**

**MAJORITY OF OUR GLOBAL SYSTEM REIMAGED**

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Reimages</td>
<td>83%</td>
<td>99%</td>
</tr>
<tr>
<td>International Reimages</td>
<td>72%</td>
<td>99%</td>
</tr>
</tbody>
</table>
STRONG FRANCHISEES THAT WANT TO GROW:
WE HAVE REALIGNED THE FRANCHISEE BASE

U.S. A-B-F program moved franchisee count from ~1,300 to ~800
Stores-per-franchisee grew from 4 to 6

International markets realigned under new ownership in a number of key markets
Japan, Germany, Spain, China, Russia and much of Scandinavia

Continuing to drive alignment with franchisees sharing our vision and desire to grow
Franchisees are splitting delivery areas to fortress their markets

273 U.S. stores opened in the last 3 years were splits

Approximately 32% of international stores in last 12 months were splits

Master franchisees are converting competing brands to Domino’s

Scooter’s brand in South Africa converted to Domino’s

DPE purchased #1 & #2 brands in Germany

DPG purchased the #3 brand in Norway
## National vs. Seattle per Store AWUS

<table>
<thead>
<tr>
<th>Year</th>
<th>Fran National AWUS</th>
<th>Seattle AWUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>$12.9K</td>
<td>$14.1K</td>
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<tr>
<td>2011</td>
<td>$13.3K</td>
<td>$14.7K</td>
</tr>
<tr>
<td>2012</td>
<td>$13.8K</td>
<td>$15.4K</td>
</tr>
<tr>
<td>2013</td>
<td>$14.6K</td>
<td>$17.0K</td>
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<tr>
<td>2014</td>
<td>$15.7K</td>
<td>$18.7K</td>
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<tr>
<td>2015</td>
<td>$17.7K</td>
<td>$22.0K</td>
</tr>
<tr>
<td>2016</td>
<td>$19.5K</td>
<td>$25.1K</td>
</tr>
<tr>
<td>2017 through Q3</td>
<td>$20.7K</td>
<td>$26.3K</td>
</tr>
</tbody>
</table>

Source: Domino's internal data
Source: Domino’s internal data; franchisee-reported
FORTRESSED MARKETS: THE SEATTLE STORY

Seattle / Tacoma DMA Total Pizza Sales Share

Source: STUDYLOGIC Eye-On-Competitive Retail
TO ACHIEVE OUR GOAL, WE MUST INVEST TO DRIVE INNOVATION & GROWTH

Dominant #1 within the next decade
THE ROAD TO #1 IN THE US WAS FILLED WITH MAJOR CONSUMER FACING INNOVATION

NPD QSR Pizza Dollar Share

Source: The NPD Group/CREST® through quarter ending September 2017
BEHIND THE SCENES, THIS INNOVATION AND GROWTH WAS FUELED BY A RELIANCE ON DATA INSIGHTS

Developed proprietary offer testing tool to optimize sales and profitability. Helped drive EBITDA to record levels

Launched 2M2T $5.99 each in Q4 2009, price remains the same today

Source: franchisee-reported
Expanded $5.99 to mix and match, adding menu additions to increase ‘smart’ ticket via more items per order

$5.99 price point enabled us to target margin goals when developing new products
WE IDENTIFIED CARRYOUT AS AN OPPORTUNITY AND FOUND A MORE PROFITABLE ENTRY THROUGH OUR OFFER TESTING
CARRYOUT SHARE HAS ALMOST DOUBLED SINCE OUR CARRYOUT DEAL LAUNCHED IN MAY 2011

Source: The NPD Group/CREST® through quarter ending September 2017
Includes carryout and drive-thru
**ADVANCED ANALYTICS BROUGHT TO STORE SITING IN 2015**

Internally developed store siting model launched in 2015

U.S. store projection from that model: ~6,200 units

---

**Rolling 12 Months - Net Store Growth**

<table>
<thead>
<tr>
<th>Year</th>
<th>Q2 14 - Q1 15</th>
<th>Q3 14 - Q2 15</th>
<th>Q4 14 - Q3 15</th>
<th>2015</th>
<th>Q2 15 - Q1 16</th>
<th>Q3 15 - Q2 16</th>
<th>Q4 15 - Q3 16</th>
<th>2016</th>
<th>Q2 16 - Q1 17</th>
<th>Q3 16 - Q2 17</th>
<th>Q4 16 - Q3 17</th>
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<td>2014</td>
<td>81</td>
<td>93</td>
<td>96</td>
<td>96</td>
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<td>132</td>
<td>147</td>
<td>161</td>
<td>171</td>
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<tr>
<td>2015</td>
<td>17</td>
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<td>1</td>
<td>-34</td>
<td>-110</td>
<td>-131</td>
<td>-113</td>
<td>-137</td>
<td>-133</td>
<td>-134</td>
<td>-180</td>
</tr>
<tr>
<td>2016</td>
<td>54</td>
<td>60</td>
<td>60</td>
<td>48</td>
<td>48</td>
<td>49</td>
<td>56</td>
<td>50</td>
<td>53</td>
<td>38</td>
<td>26</td>
</tr>
</tbody>
</table>

Source: public filings
NEW STORES OPENING STRONG

2017 Franchisee System AWUS: ~ $20,700+

2017 New Store AWUS:
Averaging ~ $18,800+
Small market AWUS (<10K HH) opening higher:
~ $20,300+

All data through P9 2017.
Source: Domino’s internal data
SALES FROM NEW STORES IN 2017 GREATER THAN TOTAL SSS IN 2012

Domino’s Domestic Retail Sales Growth

- 2011: 3.7% (0.2% from New Stores, 3.5% Same Store Sales)
- 2012: 3.3% (0.2% from New Stores, 3.1% Same Store Sales)
- 2013: 6.2% (0.8% from New Stores, 5.4% Same Store Sales)
- 2014: 9.2% (1.7% from New Stores, 7.5% Same Store Sales)
- 2015: 14.2% (2.2% from New Stores, 12.0% Same Store Sales)
- 2016: 13.5% (3.0% from New Stores, 10.5% Same Store Sales)
- 2017 Q3 YTD: 12.7% (3.3% from New Stores, 9.4% Same Store Sales)

Note: 2015 excludes impact of the 53rd week
UPDATED SITING MODEL DEVELOPED IN LATE 2017
IDENTIFIED INCREASED DOMESTIC STORE POTENTIAL

8,000+
stores in the U.S.

*Total potential store count in the U.S.
Franchisees chose where to build; developed a trade area based on that location

Massive delivery areas

Changed little as population / traffic increased

Based on maximizing store household counts

Caused delivery issues; especially to fringes of delivery areas

Data above is for illustrative purposes only.
TODAY’S DEVELOPMENT IS PURPOSEFUL, SURGICAL

Franchisees select from a catalog of opportunities

Optimized delivery areas based on complex algorithms, metrics and demographics

Focus on providing exceptional delivery service and great carryout options

Opportunities are ranked and time-bound

Data above is for illustrative purposes only.
MORE STORES RESULT IN A MORE ATTRACTIVE CARRYOUT PROPOSITION

The majority of a store’s carryout business is within 6 minutes of that store

Source: Domino’s internal data
AND CARRYOUT IS SIGNIFICANTLY BIGGER THAN DELIVERY

Source: The NPD Group/CREST® Year Ending September
CO = Carry Out and DT = Drive Thru
MORE STORES ALSO RESULT IN A BETTER DELIVERY NETWORK

Tighter delivery areas lead to:

✓ Reduced delivery time
✓ Increased customer satisfaction
✓ More profitable orders
A BETTER DELIVERY NETWORK REQUIRES MORE THAN JUST MORE STORES

It requires investing in more of what we do well:

- Advanced Analytics/Machine Learning
- Technology
- Logistics
- GPS driver tracking
- Australia, Japan, UK and U.S. (San Diego)
- Autonomous vehicles
OTHERS ARE TRYING TO GET INTO DELIVERY, BUT THE ECONOMIC MODEL IS NOT OPTIMIZED FOR ALL PARTIES

Delivery is hard...and expensive

- **Uber.** Despite stabilization efforts at the company (including a huge cash infusion from SoftBank), Uber will keep losing ground to its smaller rivals.
- **Warren Buffett’s net worth.** Sure, the Oracle of Omaha’s net worth hit a new high of $81.5 billion this fall, according to Bloomberg, but further growth next year will be thwarted by his tendency to give it away.
- **Opioid distributors and manufacturers.** They’ll be forced to rethink their practices under mounting litigation filed by cities, counties, and states, not to mention growing public pressure.
- **Mom-and-pop weed companies.** Quickening industry consolidation will nip many aspiring cannabiz moguls in the bud.
- **$100 yoga pants.** Lululemon and other stalwarts of the “athleisure” craze will lose market share as people who actually exercise realize there’s no point in working out in expensive clothes.
- **Food delivery startups.** The day of reckoning is finally nigh for heavily VC-subsidized food delivery startups. (Just ask Blue Apron investors.)
- **Podcasts.** The airwaves have reached the saturation point for three guys and a Patreon account. A shakeout is coming.

Uber: $1.5B loss in Q3 2017
Delivery is hard...and expensive

Restaurant margins significantly impacted
25-30% of ticket
Challenging for ticket <15-$20

Delivery costs remain hurdle in casual dining: Darden CEO

“We’ll do it ourselves before we live with their economics”

Gene Lee, CEO Darden

Source: Nation’s Restaurant News; Dec 19, 2017
Others are trying to get into delivery, but the economic model is not optimized for all parties.

Delivery is hard...and expensive

Restaurant margins significantly impacted
25-30% of ticket
Challenging for ticket <15-$20

Delivery is a large percentage of customer bill for most QSR orders

Receipt from Uber Eats in Portland Oregon (Pearl District), Halloween night (5:45pm).

<table>
<thead>
<tr>
<th>Item</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Humus</td>
<td>$6.95</td>
</tr>
<tr>
<td>Meat Mezza</td>
<td>$14.95</td>
</tr>
</tbody>
</table>

Add restaurant instructions

Subtotal $21.90
Booking Fee $4.99
Busy Area $6.04
Total $32.93

$11.03 delivery charge (>50% of cost for the food)
15% tip would add another $4.94
WE’RE BUILDING A SUSTAINABLE, VIRTUOUS CYCLE THAT WILL DRIVE DELIVERY & CARRYOUT DOMINANCE

- **Build Stores to fortress markets**
- **Better positioned for Carryout Opportunity**
- **Improved Delivery Network**
- **Insulated from delivery competitors**
- **Higher Customer Satisfaction**
- **Increased store-level profits; ‘Easier to run’ stores**
Australia opening stores with average of 8,000 households and 6-minute drive times

Netherlands fortressing and now achieving 21-minute average delivery times

Austria opened with 4-minute drive times

Iceland opened their 23rd store in a country with only 334,000 people!
DOMINO’S WAS THE ORIGINAL ONLINE DELIVERY AGGREGATOR...
...AND WE ARE INVESTING TO STAY ON TOP
Jeff Lawrence
Chief Financial Officer
AGENDA

RECENT RESULTS
- Top Line Growth Drivers
- Bottom Line Results
- Shareholder Returns

LOOKING AHEAD TO 2018
- Investing to Win
- Commodities and FX Outlook
- Tax Reform
- Accounting Update
- Balance Sheet Update

BUSINESS OUTLOOK
- Industry Outlook
- DPZ Outlook
Growth generated in four ways:

- Domestic Same-Store Comps
- International Same-Store Comps
- Domestic New Store Growth
- International New Store Growth

= Global Retail Sales
Note: 2015 excludes impact of the 53rd week
Note: 2015 excludes impact of the 53rd week
STORE GROWTH FINALLY COMPLEMENTING ROBUST US COMP GROWTH

Domino’s Domestic Retail Sales Growth

Note: 2015 excludes impact of the 53rd week
INTERNATIONAL CONTINUING TO GET DIVERSIFIED RETAIL SALES GROWTH

Note: 2015 excludes impact of the 53rd week
International sales exclude the impact of foreign currency exchange rate changes.
ACCELERATED GLOBAL STORE GROWTH

Q3 2017 TTM Net Growth = 1,182

Net Growth +4,692

9,742 10,255 10,886 11,629 12,530 13,811 14,434
BOTH U.S. & INTERNATIONAL UNITS ACCELERATED

Net Growth +4,692

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>513</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>631</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>743</td>
<td></td>
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<tr>
<td>2015</td>
<td>901</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td></td>
<td>1,281</td>
</tr>
<tr>
<td>Q3 YTD 2017</td>
<td></td>
<td>623</td>
</tr>
</tbody>
</table>

Domestic  International
Retail Sales Growth without FX

Note: 2015 excludes impact of the 53rd week
Certain diluted EPS amounts are adjusted for items affecting comparability. Items adjusting comparability are detailed in the respective Earnings Release on Form 8-K.
CONSISTENT RETURNS FOR OUR SHAREHOLDERS

~$4.0 billion returned to shareholders over the last 12 years

*Note – All publicly disclosed information as of 12/18/17
Source: Bloomberg
Total Shareholder Return = \frac{(\text{Price}_{\text{end}} - \text{Price}_{\text{begin}} + \text{Dividends})}{\text{Price}_{\text{begin}}}

CONSISTENT RETURNS FOR OUR SHAREHOLDERS
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We don’t invest without discipline, but we do invest, especially when we see expected value for our customers, team members and shareholders.
We Invest Differently

We invest like a disruptor; deliver like a growth company
INVESTING TO WIN
INVESTING TO WIN

Projected 2018 Gross G&A of ~$380 - $385 million
- Includes investments in technology/digital innovation (including depreciation), supply chain, marketing and analytics
- Can flex significantly with performance and strategic opportunities

Projected 2018 CapEx of ~$90 - $100 million
- Technology Innovation
- Supply Chain Growth
- New Unit Growth (Team USA)
- Willing to invest above this estimate for strategic opportunities
Building stores
Reimaging stores
Spending on digital and technology

CAPITAL IS FLOWING TO THE DOMINO’S BRAND!
U.S. COMMODITIES OUTLOOK

Current U.S. store food basket outlook is projected to be up 2% – 4% vs. 2017 levels
FX HAS BEEN A PERSISTENT HEADWIND

FX Impact on Royalty Income (YOY $ in millions)

2012: -$4.0
2013: -$4.3
2014: -$3.4
2015: -$19.9
2016: -$8.9
Q3 2017 YTD: -$2.9
Diversified portfolio of more than 55 currencies

Currently projecting a flat – $4.0M positive impact in 2018 vs. 2017 rates
Tax reform act passed

DPZ historically a full rate tax payer

New ongoing effective tax rate expected to be in 22% - 24% range

Excludes tax benefit of equity-based compensation

Still assessing full impact of new tax legislation
International Franchise Fees

- Impacts to timing of recognition of international franchise fees (upfront vs. now over term of store agreement)
- Estimated to reduce international franchise revenue $1.5M in 2018

Advertising Fund

- Prior guidance netted revenues and expenses on the P&L
- Assessing if gross presentation will be required
BALANCE SHEET UPDATE

Completed refinancing during Q3 2017; ended the quarter with leverage ratio ~5.7x

2015 Notes due October 2020, callable without penalty April 2018

Refinancing continues to be an opportunity

Markets remain favorable to borrowers like DPZ

Goal is to optimize cost of capital over time
RECENT RESULTS
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LOOKING AHEAD TO 2018
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GLOBAL PIZZA INDUSTRY OUTLOOK IS HEALTHY

U.S. pizza market is ~$38 billion and expected to grow low single digits annually

International pizza market is ~$87 billion and expected to grow 3-4% annually

Globally, carryout and delivery segments growing faster than dine-in

Source: NPD/Crest, Restaurant Trends and Company estimates.
Outlook does not constitute specific earnings guidance.
Domino’s does not provide quarterly or annual earnings estimates.