

CHECK BREAKDOWN: DPZ**ENGAGEMENT AND PRICING**

DPZ Customer engagement feedback is generally consistent with prior waves, if only a touch softer q/q. Customers of all casual dining restaurants, on balance, report noticing that menu prices have increased. It is worth noting, though, that Domino's customers are the least likely to flag increases compared to customers of the other restaurants in our survey.

DPZ MOBILE APP: POSITIVE

The percentage of customers who say they order through the Domino's mobile app is tracking near series highs.

VISIT CATALYSTS:

Taste and price remain the top two factors driving visits to Domino's; however, the digital ordering experience and loyalty program are significant drivers as well.

DELIVERY APPS IMPACT:

In more recent volumes, third party delivery app ordering among DPZ customers has slowed and the % who say third party apps make them order through Domino's less has pulled back. The longer-term trend has been that Domino's customers have adopted usage of food delivery apps.

DELIVERY APPS FILL-IN FEEDBACK:

Domino's customers like that Domino's has its own app. The prevailing sentiment among customers is that Domino's having its own app keeps the costs down that flow to them. There are some who would advocate for DPZ to be on third party food delivery apps to reduce the number of apps on their phone or for Domino's to get more exposure, but on balance more respondents feel Domino's is better off having its own app.

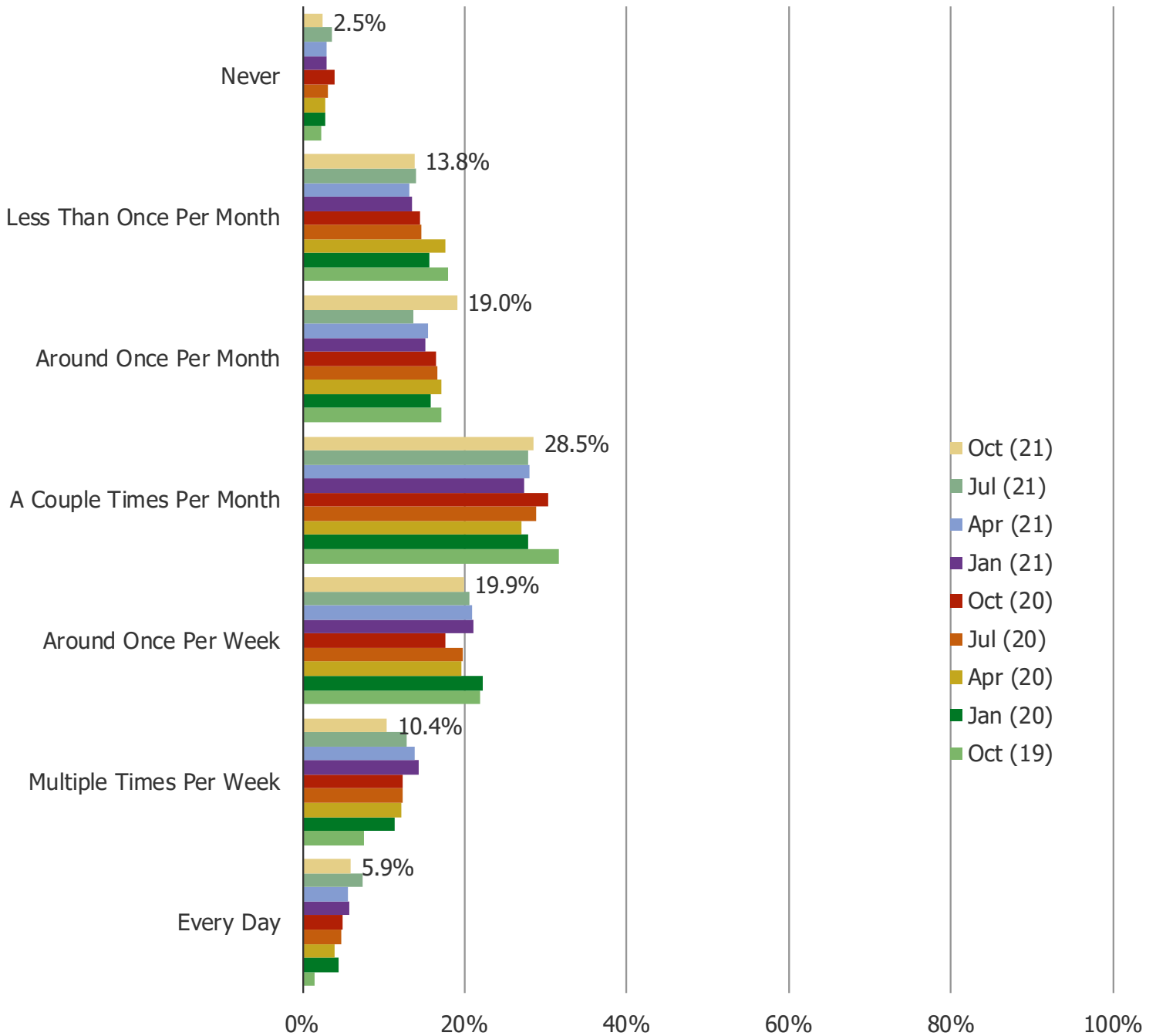
DPZ and Food Delivery Apps

PIZZA

PIZZA

HOW OFTEN DO YOU EAT PIZZA?

Posed to all respondents.

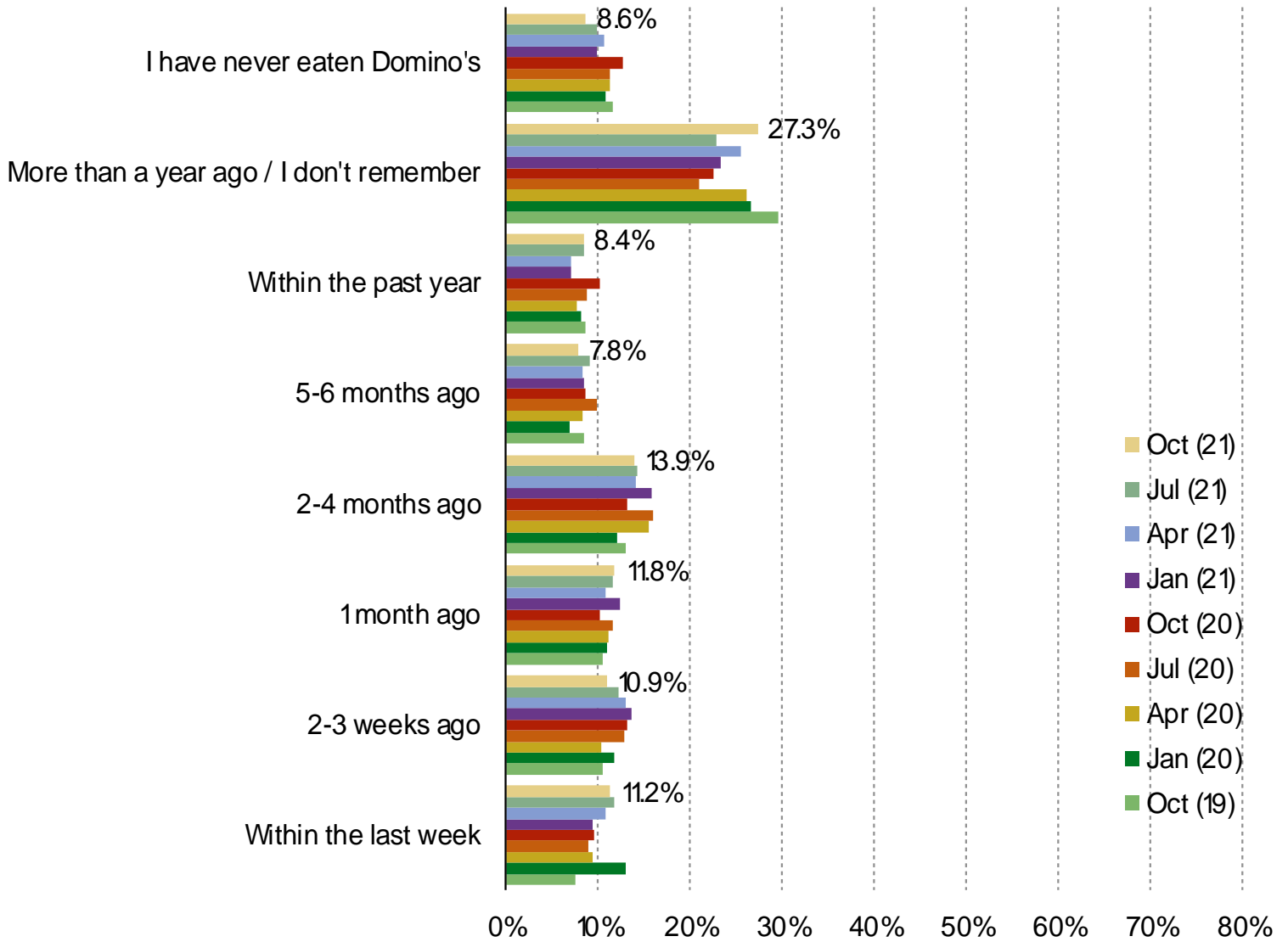


DPZ ENGAGEMENT

PIZZA

WHEN WAS THE LAST TIME YOU ATE DOMINO'S?

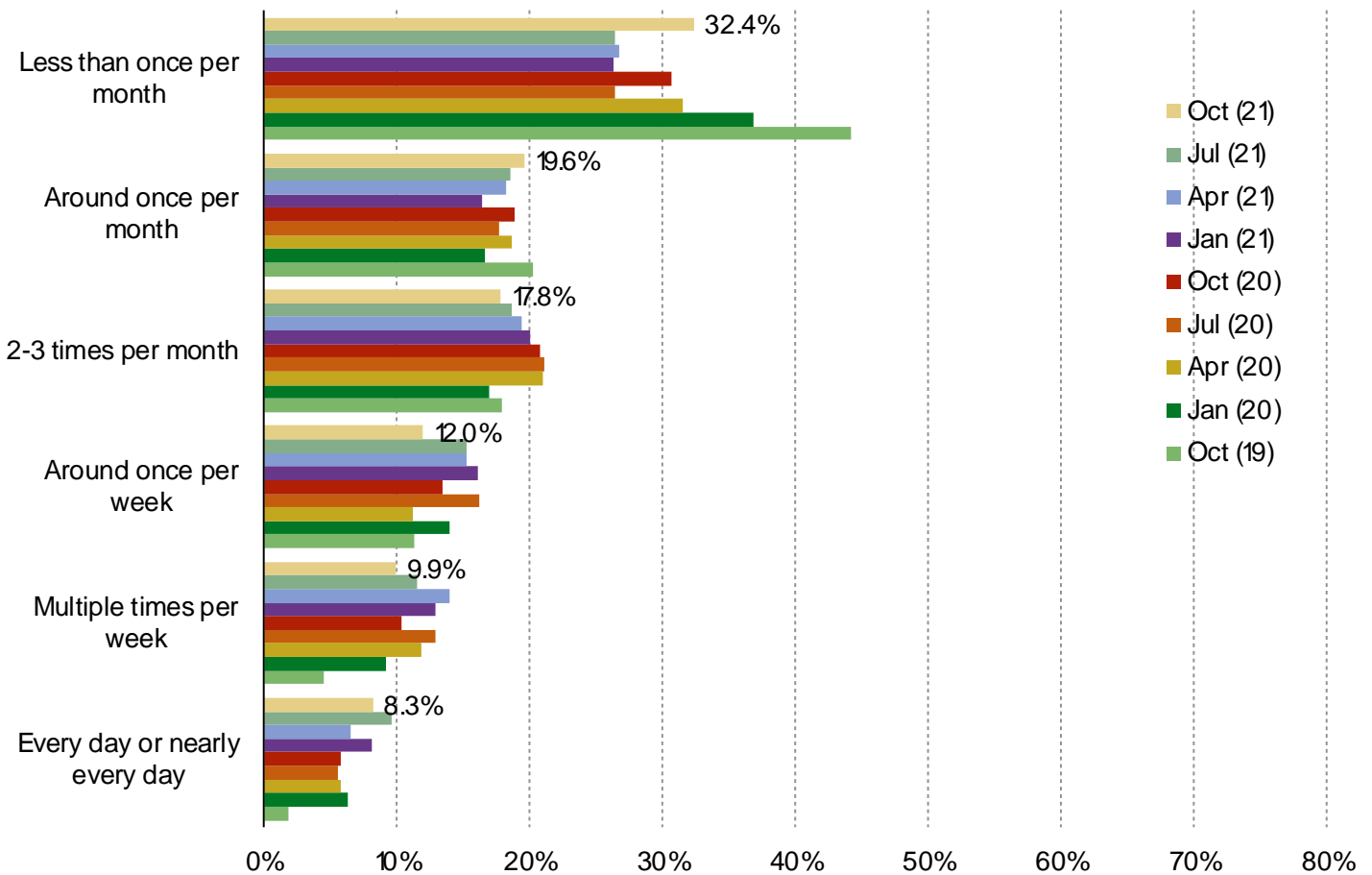
Posed to all respondents.



PIZZA

HOW FREQUENTLY DO YOU TYPICALLY EAT DOMINO'S?

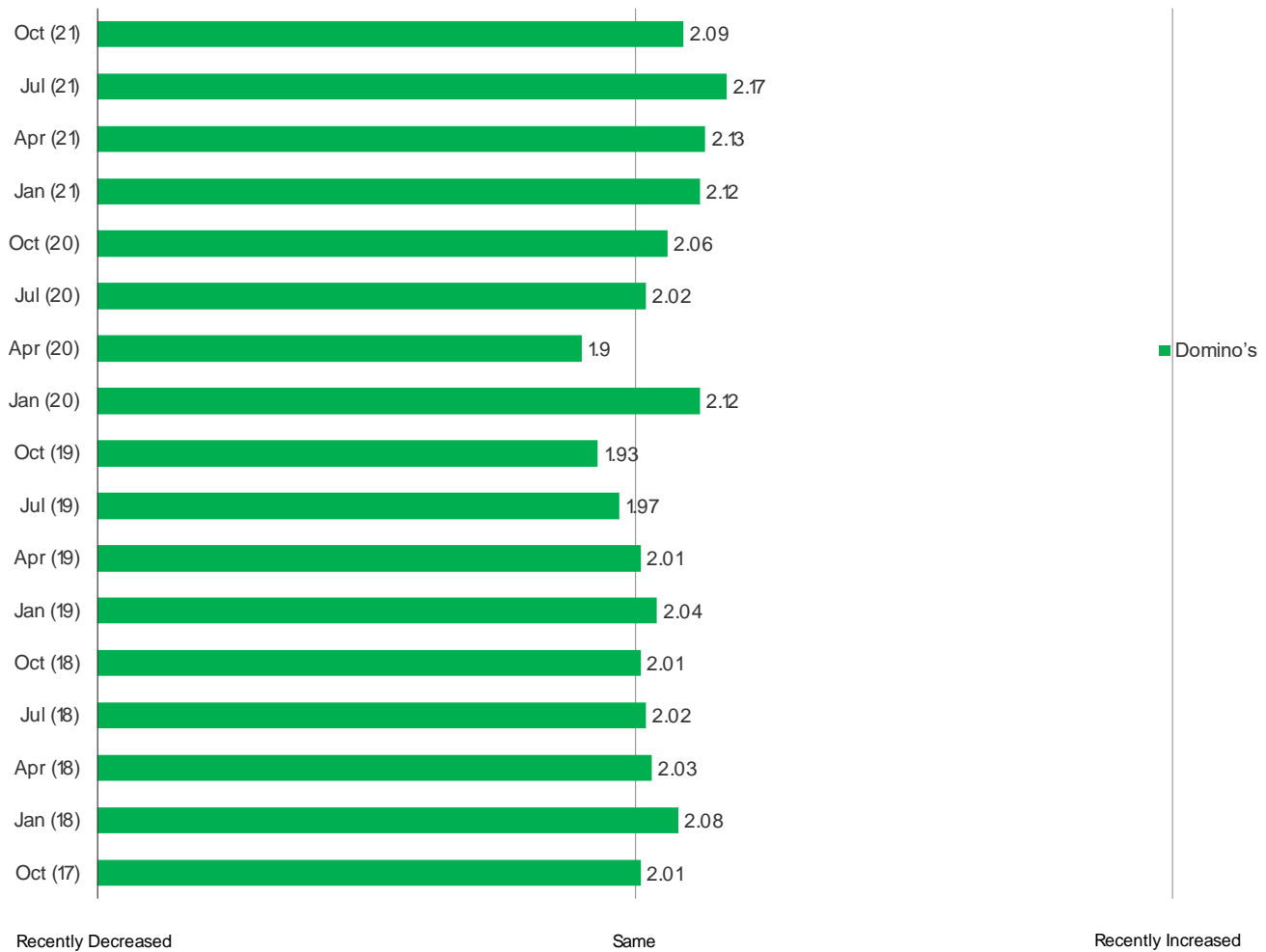
Posed to respondents who have eaten Domino's in the past year.



PIZZA

HAVE YOU CHANGED HOW OFTEN YOU TAKEOUT OR DINE AT DOMINO'S?

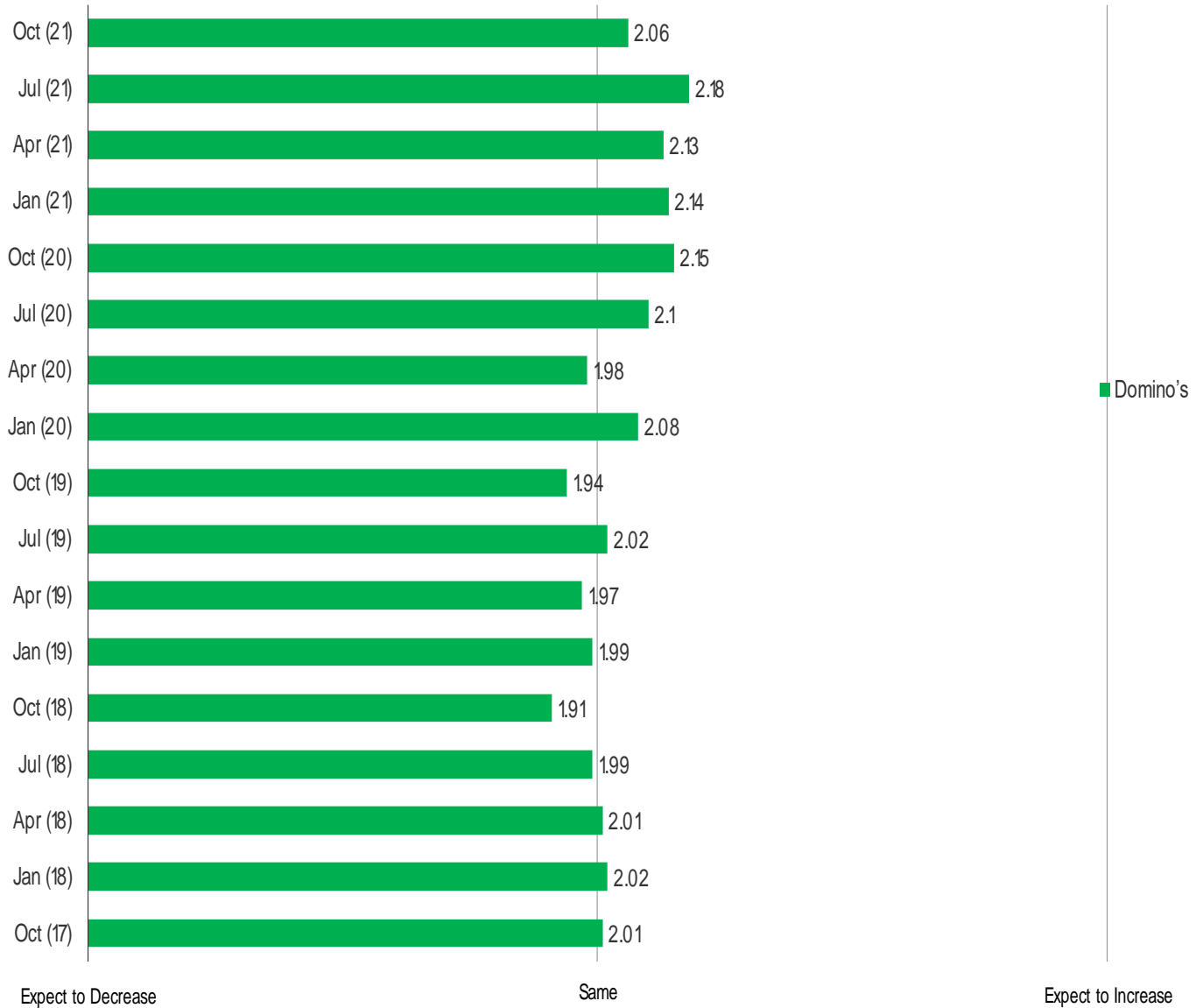
Posed to respondents who have eaten Domino's in the past year.



PIZZA

GOING FORWARD, DO YOU EXPECT TO CHANGE HOW OFTEN YOU TAKEOUT OR DINE AT DOMINO'S?

Posed to respondents who have eaten Domino's in the past year.



PIZZA

HAVE YOU NOTICED ANY CHANGES TO MENU PRICES AT THE FOLLOWING RECENTLY?

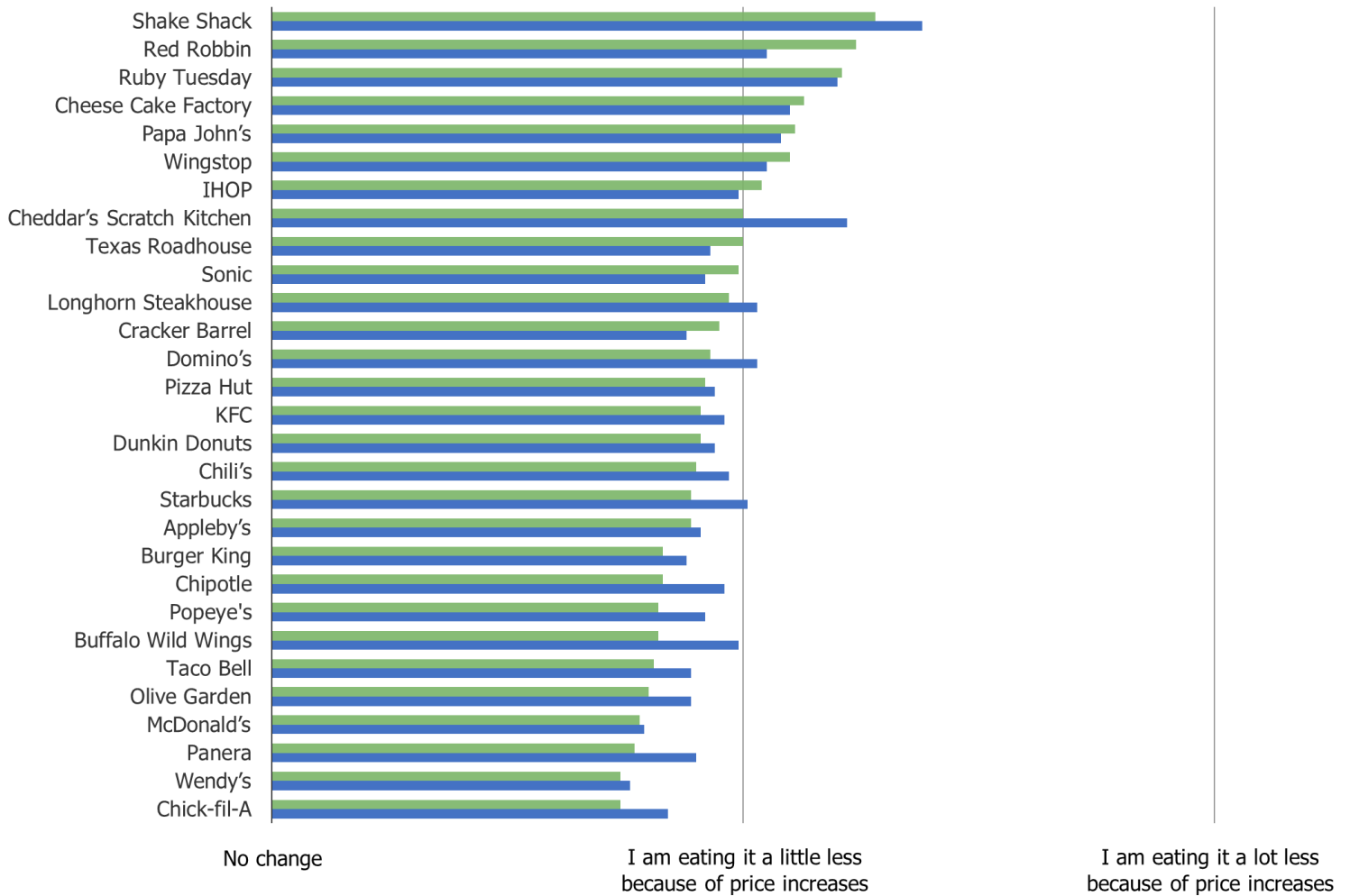
Posed to respondents who regularly or occasionally eat each of the following.



PIZZA

HAVE YOU CHANGED HOW OFTEN YOU EAT FOOD FROM HERE BECAUSE OF THE PRICE INCREASES YOU HAVE NOTICED?

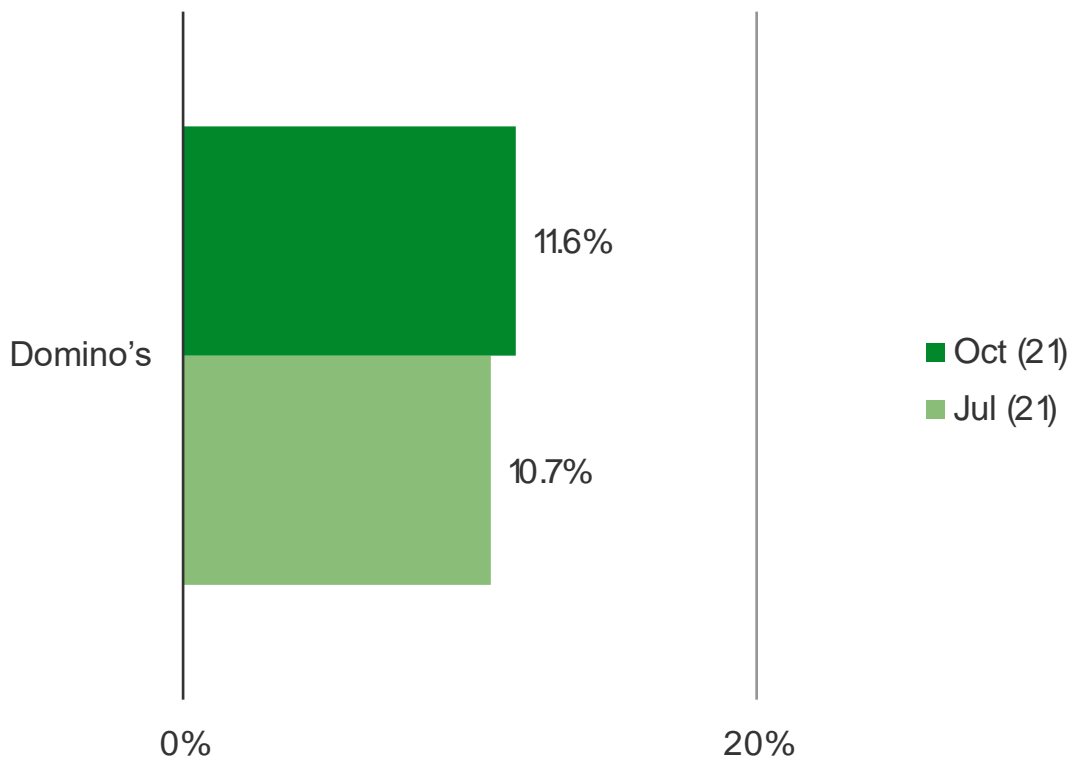
Posed to respondents who regularly or occasionally eat each of the following AND have noticed increases in pricing at the following recently.



PIZZA

ARE YOU CURRENTLY A REWARDS/LOYALTY PROGRAM MEMBER OF ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents.

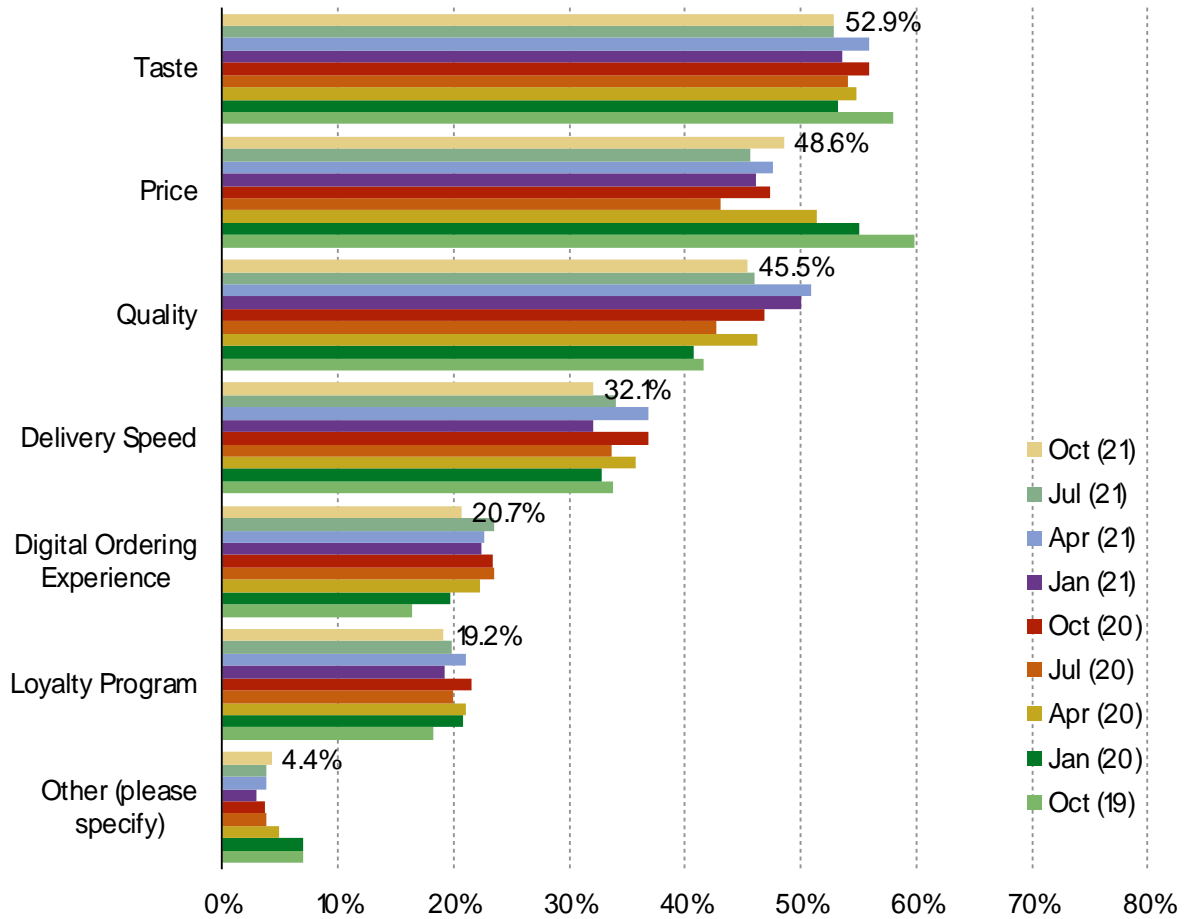


CATALYSTS AND MOBILE ORDERING

PIZZA

WHY DO YOU EAT DOMINO'S (SELECT ALL THAT APPLY)

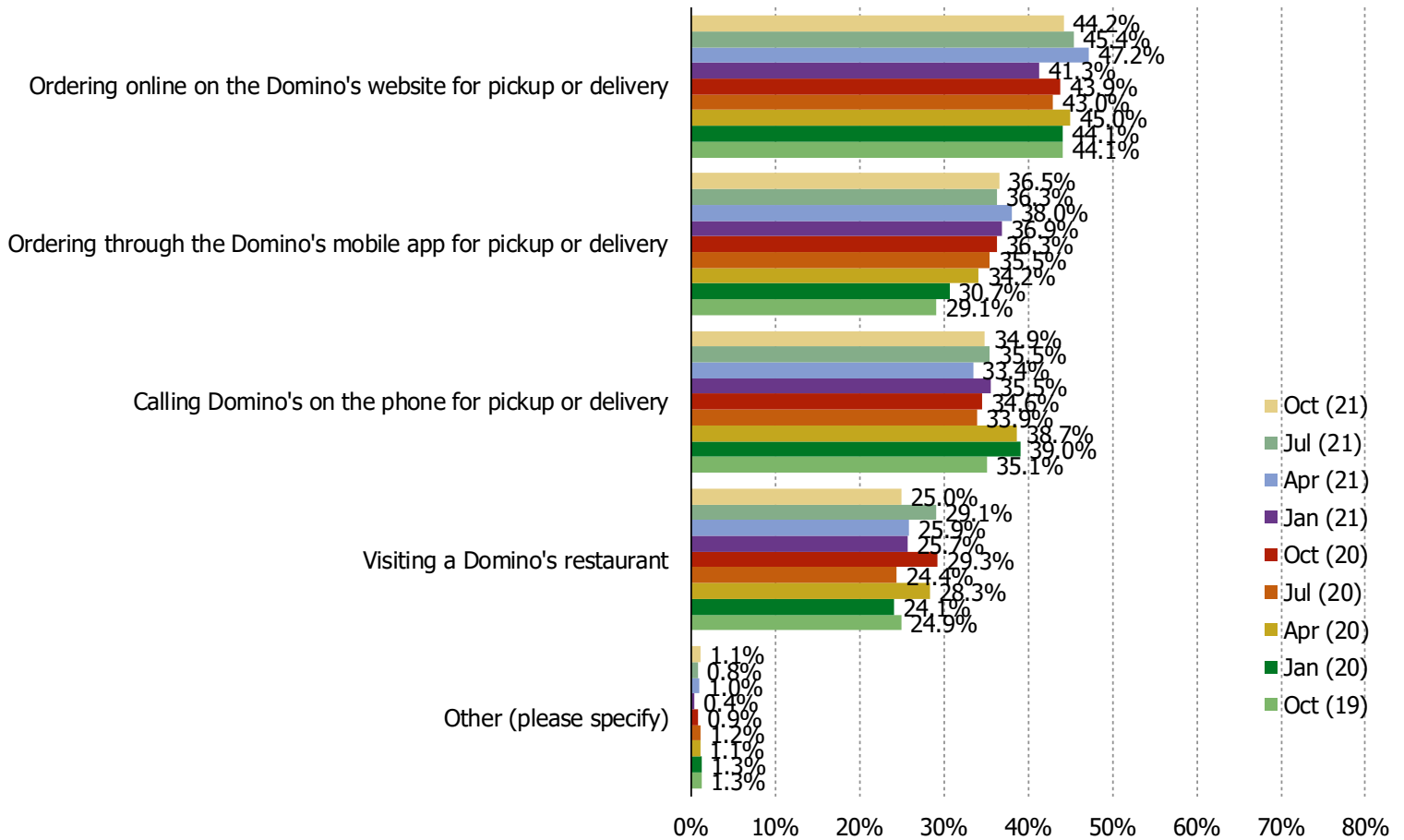
Posed to respondents who have eaten Domino's in the past year.



PIZZA

HOW DO YOU TYPICALLY GET DOMINO'S?

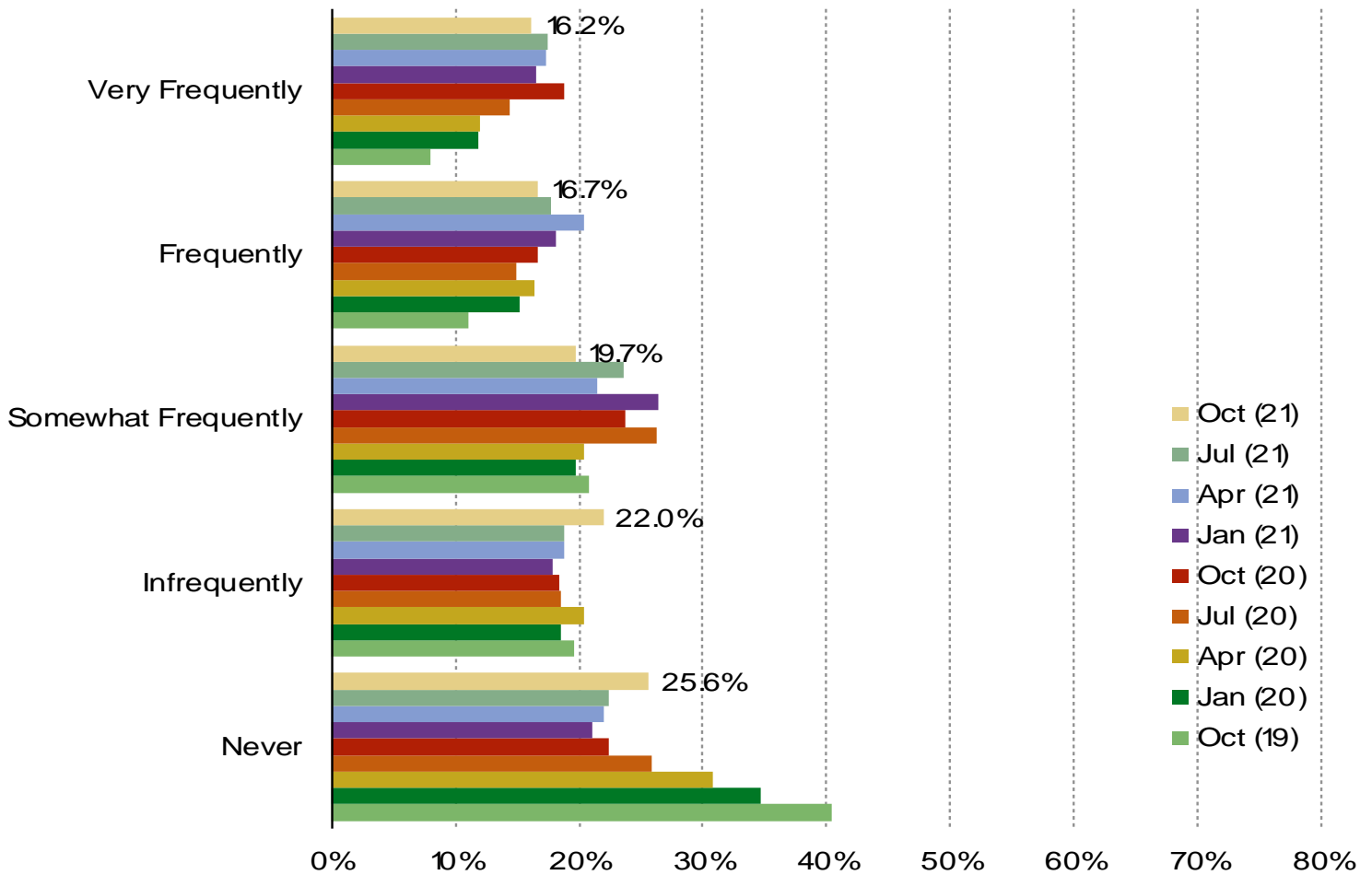
Posed to respondents who have eaten Domino's in the past year.



PIZZA

HOW OFTEN DO YOU ORDER THROUGH DOMINO'S MOBILE APP?

Posed to respondents who have eaten Domino's in the past year.



THIRD PARTY FOOD DELIVERY APPS VS. DPZ

PIZZA

DO YOU THINK DOMINO'S IS BETTER OFF OFFERING DELIVERY THROUGH ITS OWN APP OR THAT IT WOULD BE BETTER OFF PUTTING THEMSELVES ON THIRD PARTY FOOD DELIVERY APPS? WHY?

Posed to Domino's customers.

In Sum:

Much like responses in July, feedback was varied but more customers felt Domino's is better off delivering themselves (over third party apps).

The main reasons respondents want Domino's to continue offering delivery through their own app are related to costs and to Domino's being good at customer service/speed/quality through its own app. Customers astutely recognize that keeping third party fees out of the equation helps keep the price they pay for Domino's lower.

Respondents who favored them being on third party apps said they felt that way because it would give Domino's more exposure or because it would make it easier for them to have fewer apps on their phones.

PIZZA

DO YOU THINK DOMINO'S IS BETTER OFF OFFERING DELIVERY THROUGH ITS OWN APP OR THAT IT WOULD BE BETTER OFF PUTTING THEMSELVES ON THIRD PARTY FOOD DELIVERY APPS? WHY?

Posed to Domino's customers.

Interesting Fill-In Responses:

Better off on their own. It is cheaper, more efficient and they already have drivers
Better off ordering through it's own app because their customer service is too disorganized as it is.

Better off third part because it gives them more exposure

Better off through its own app

Better off through its own app. Its delivered quicker most of the time.

better off through third parties

Better off using they're own

better off using thier own

better on their own app

Better on third party apps

Better through its own app

Better through its own app because there are fewer parties. It is easier just to have the company itself deliver

Better thru 3rd party delivery

Better to use their own delivery. Door Dash has horrible service and fees.

Better with there own delivery

Better with third party apps

both it doesnt matter to me either way

Both more business using third party for more money but they have great delivery's themself

Both really that would make sense

Both works fine it's just personal choice

Both...more customers will see their food listed on third party apps. But some people only depend on and trust the "traditional" pizza delivery person with their food.

Cause it's faster

Definitely through their own delivery service

Delivering it themselves

Delivering on it's own because it's more accurate.

Delivering through its own app. Independence.

DO YOU THINK DOMINO'S IS BETTER OFF OFFERING DELIVERY THROUGH ITS OWN APP OR THAT IT WOULD BE BETTER OFF PUTTING THEMSELVES ON THIRD PARTY FOOD DELIVERY APPS? WHY?

Posed to Domino's customers.

Interesting Fill-In Responses: (Continued)

Delivery through its own app because it will save money and time.

Delivery through its own app would be ideal to potentially minimize fees but I can't order from them for delivery most of the time because they don't deliver to my apartment.

delivery through it's own app, people like the pizza enough to download the app

Door dash because it has the best quality and service.

Door dash they would have more business

I believe they should use third party apps, however, I understand their own delivery people may get paid less because they depend on tips.

I believe through their own app works just fine. This also keeps job security for their drivers.

i think domino`s could do both. so we can have options when we either go to thirdparty app or their website.

I think Domino's does good with there app

I think Domino's is better off continuing to offer delivery through its own app

I think it is better to use their own app because they are able to keep all the money.

I think it should get onboard with the times and join doordash

I think it would be better putting it also on third party apps

I think it would be better would third party apps because it would be more convenient.

I think it would be even better if dominoes had a delivery app

I think it's better off delivering from its own app because it makes it easier on the customer and the restaurant and won't cost as much in the long run. Plus I think people like ordering pizza from pizza chains because they deliver their own food

I think that they are better off delivering through their own app so there is not a third party middle man that they arw going through which can cause for error and complications. I like being able to call the store and talk to a live person as well as take time through the app.

I think they are better of using there own app as they already offer delivery

I think they should still offer their own delivery because they have zero control over third parties and it's their product ultimately that's being ordered plus if they those companies were to shutdown in a certain area while domino's busy was still profitable in that area then what.

DO YOU THINK DOMINO'S IS BETTER OFF OFFERING DELIVERY THROUGH ITS OWN APP OR THAT IT WOULD BE BETTER OFF PUTTING THEMSELVES ON THIRD PARTY FOOD DELIVERY APPS? WHY?

Posed to Domino's customers.

Interesting Fill-In Responses: (Continued)

I think they should use their own app for ordering/delivery

I THINK THEY WOULD DO BETTER USING THEIR OWN PEOPLE BECAUSE ITS CHEAPER FOR THE PEOPLE

I think they're better off for domino's to have their own drivers

I think theyd be better on doordash. More traffic.

I think they're better off offering it on their own and keeping it off third-party apps. The fees are typically smaller at places that deliver their own food and that alone is far mroe appealing to me than ordering through Postmates.

I think thru its own app as they then know order is right and can keep track of their deliveries and tips go to their people

I think using thir own app because they have a person there instead of having to wait for a person to show up

It will be better off offering delivery through their own app

It would be better off being on third party apps because there's more exposure

It would be better off offering delivery through it's own app. It just makes better business sense to delivery through your own company.

better off putting themselves on third party apps to increase customer outreach

It's own app because fees are cheaper

It's own app because I order from Dominos more frequently than any other place on a 3r party app due to the low cost of Domino's delivery.

It's own app because it's just easier in my opinion

It's own app because it's less expensive

It's own app because the price won't be as expensive as say Uber eats or grub hub

It's own app is better

It's own app. Less expensive that way

It's own app because it's cheaper for the consumer

It's own app more money for them

its own app, donnt have to pay others

It's own app, seems more safe for them.

It's own app. It's direct without added fees other than delivery.

its own app-most consumers are more used to this method

Its own, would involve less fees

DO YOU THINK DOMINO'S IS BETTER OFF OFFERING DELIVERY THROUGH ITS OWN APP OR THAT IT WOULD BE BETTER OFF PUTTING THEMSELVES ON THIRD PARTY FOOD DELIVERY APPS? WHY?

Posed to Domino's customers.

Interesting Fill-In Responses: (Continued)

own app because they are well known and established

own app because they have their own rewards program

Own app cuz it's easier

Own app is better, ususally the fees are less.

Own app, Domino's employees get the business

Own app, keep the price low

own app, quicker specific

Own app, wide delivery range and no third party fees

own app. because it services places that food delivery do not

Own app. Faster delivery. Less expensive

Own app. The price is lower

Own app. They are a delivery service

Own app....it would be cheaper for customer

party part party party

Personal

Postmates

Probably better off with their own app because dominos already has solid dependable delivery

Probably third party because so many people use them.

Put them on other apps for more access

Put themselves on third party apps. It will increase their customer count.

Putting delivery on app will be better because is going to be fast and easy

Putting them on apps

Putting themselves on apps

Putting themselves on third party apps

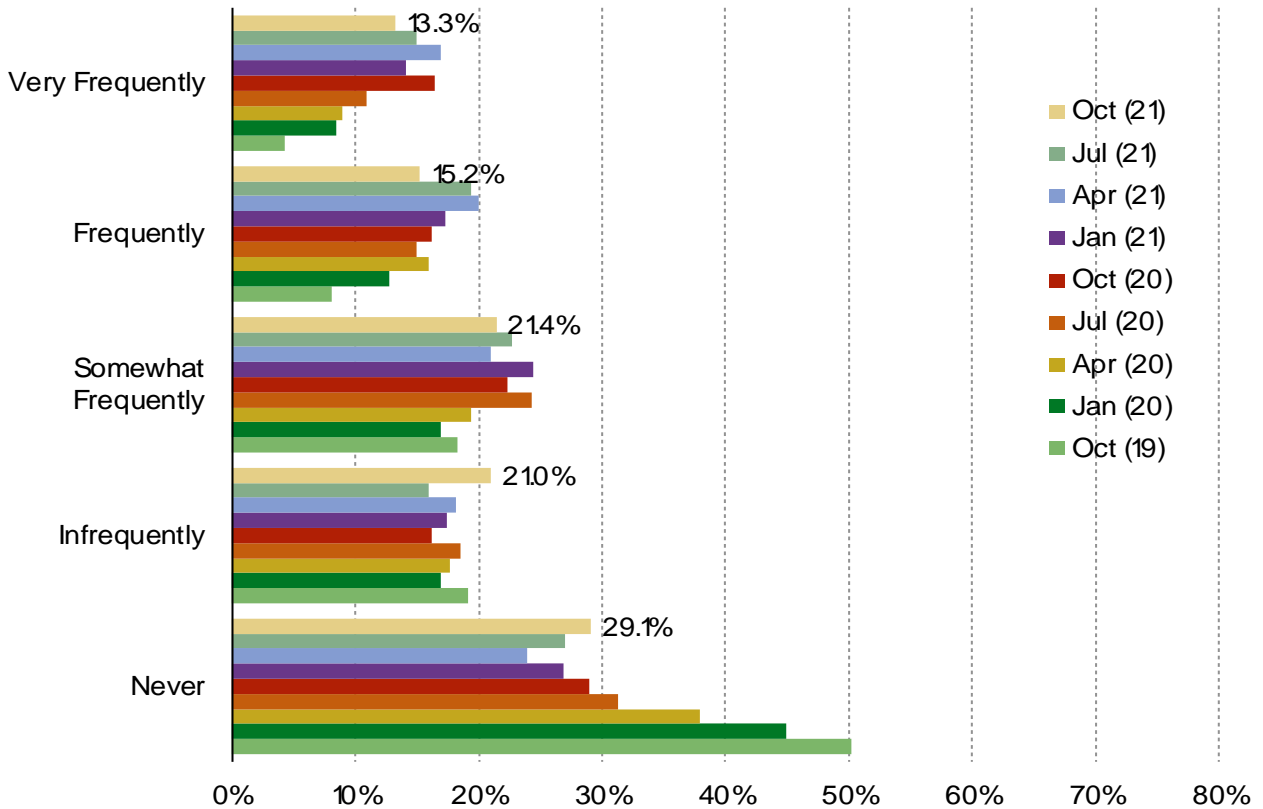
putting themselves on third party apps because it gives them more exposure

Putting themselves on third party apps because people will order it more

PIZZA

HOW OFTEN DO YOU ORDER (FROM ANY RESTAURANT) THROUGH THIRD PARTY FOOD DELIVERY APPS? (IE. UBER EATS, DOOR DASH, POSTMATES, GRUBHUB, ETC)

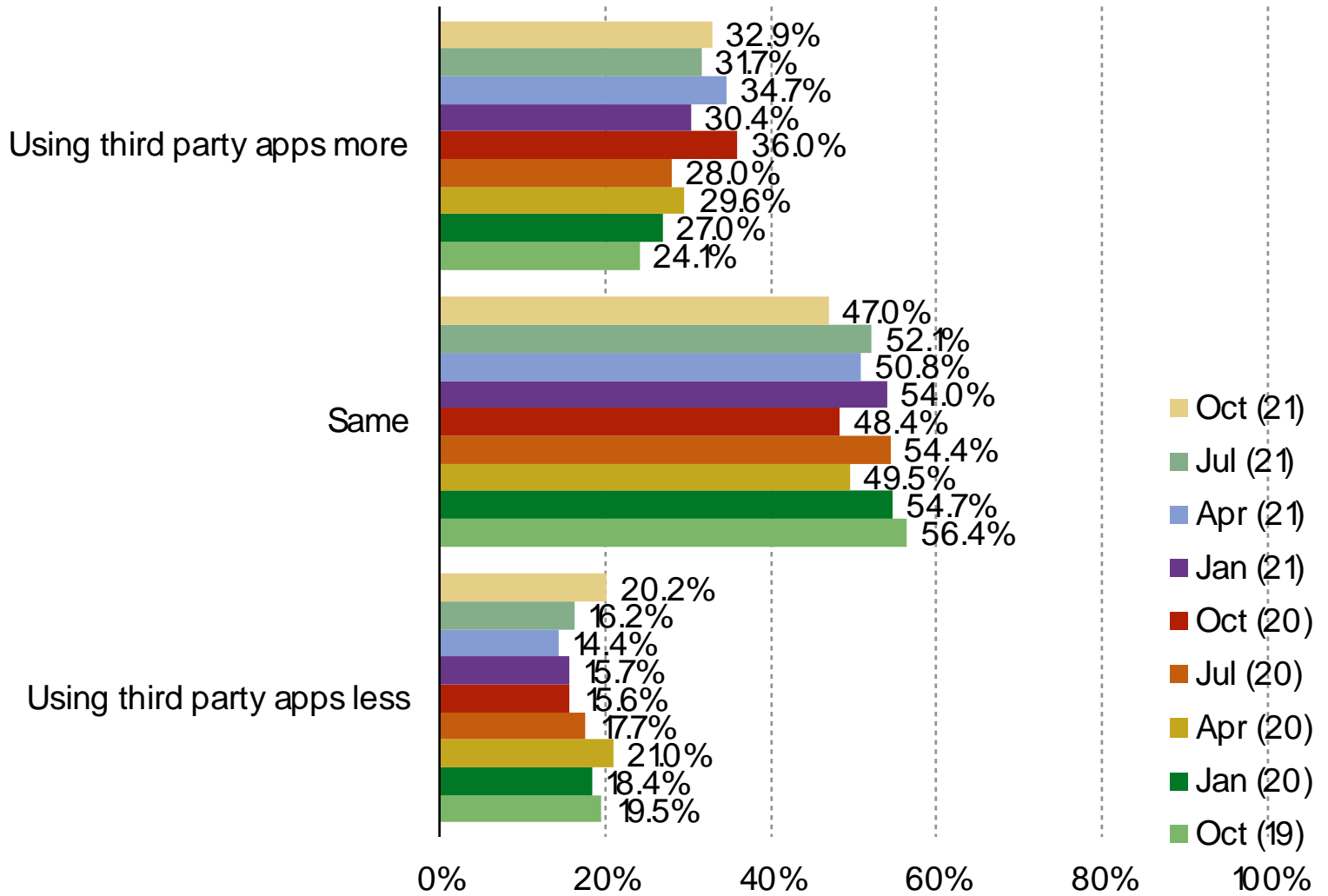
Posed to respondents who have eaten Domino's in the past year.



PIZZA

HAVE YOU BEEN USING THIRD PARTY FOOD DELIVERY APPS (UBER EATS, DOOR DASH, POSTMATES, GRUBHUB, ETC) MORE OR LESS OVER TIME?

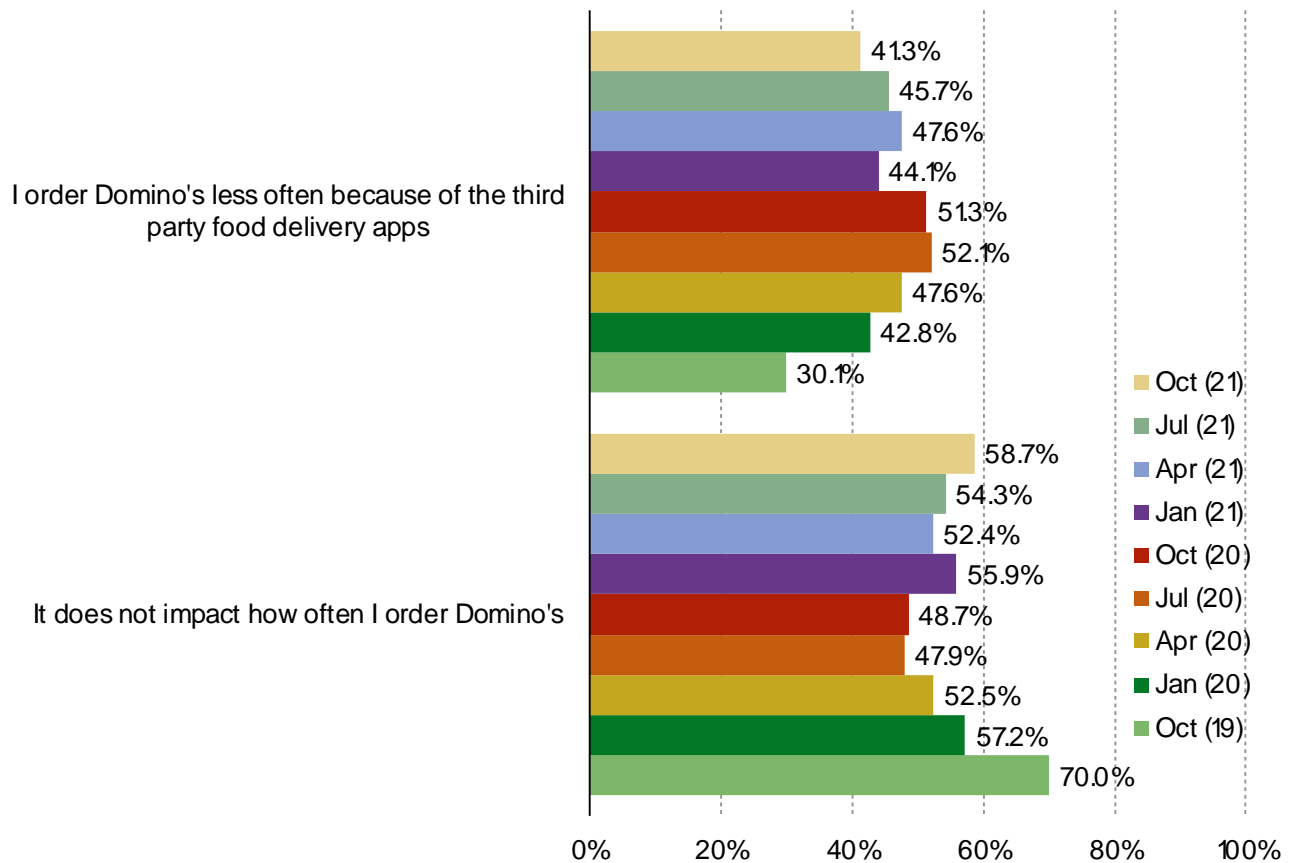
Posed to respondents who have eaten Domino's in the past year AND order from third party food delivery apps.



PIZZA

DOES YOUR USAGE OR THIRD PARTY FOOD DELIVERY APPS (UBER EATS, DOOR DASH, POSTMATES, GRUBHUB, ETC) HAVE ANY IMPACT ON HOW OFTEN YOU ORDER DOMINO'S?

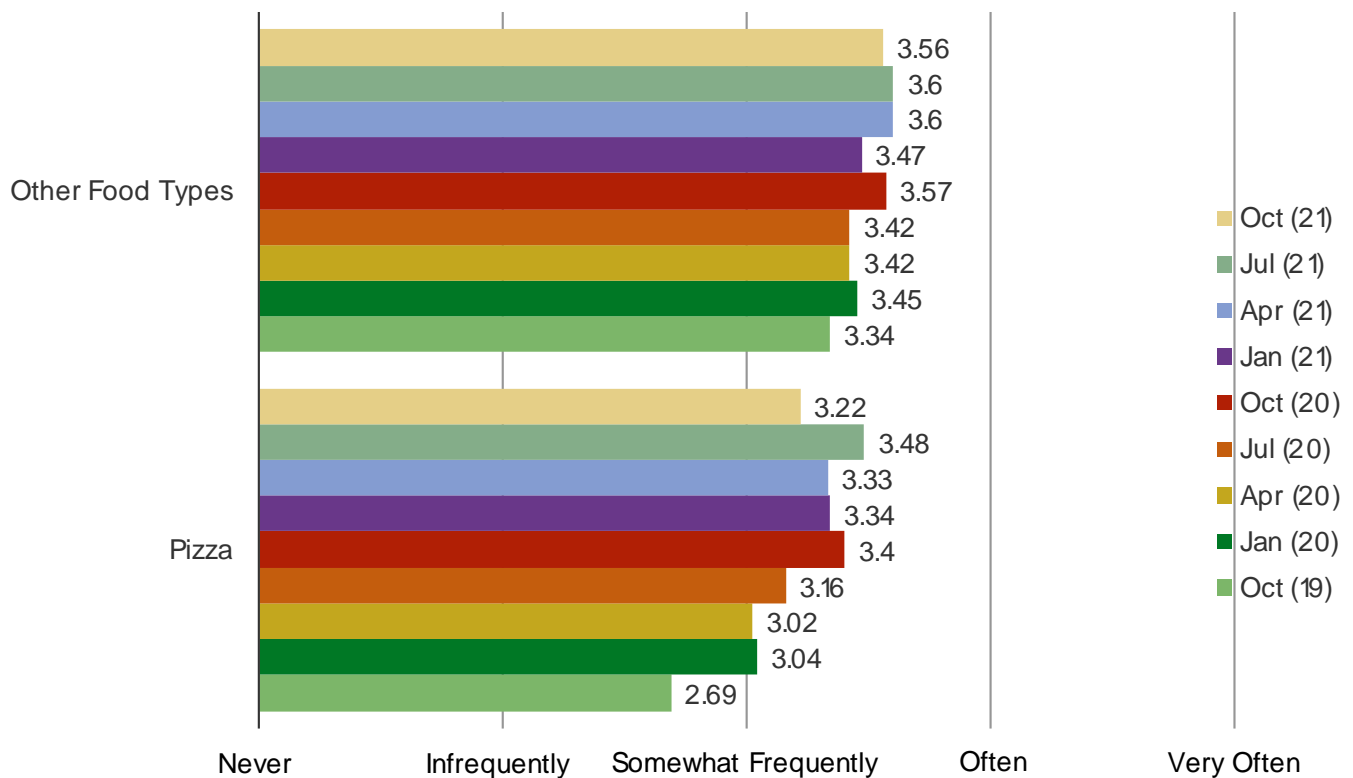
Posed to respondents who have eaten Domino's in the past year AND order from third party food delivery apps.



PIZZA

WHEN YOU ORDER THROUGH THIRD PARTY FOOD DELIVERY APPS, ARE YOU ORDERING PIZZA OR OTHER FOOD TYPES?

Posed to respondents who have eaten Domino's in the past year AND order from third party food delivery apps.



PIZZA

WOULD YOU ESTIMATE THAT YOU HAVE BEEN INCREASING OR REDUCING YOUR CONSUMPTION OF DOMINO'S OVER THE PAST YEAR OR SO?

Posed to respondents who have eaten Domino's in the past year.

