

Pizza and Pasta Restaurants (and Takeaway) - UK - January 2010

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What is this report about?

As well as battling the recession along with the rest of the eating out market, the pizza/pasta restaurant market has had a number of additional factors to deal with that are either unique to the sector or affect it more specifically. The sector is also notable for its stronger than average reliance on the discount culture during the recession. On the other hand the sector has benefited from some of its unique market conditions, not least through its position as the forerunner in e-commerce revenues in the home delivery market.

This report examines the impact of the recession on this specific marketplace whilst also gathering and analysing consumer reactions to government concerns in this area. The report also looks at patterns of usage in the market as well as consumer attitudes towards 'the good, the bad' and the ugly elements of the pizza and pasta restaurant sector.

What have we found out?

- A quarter of customers who have been to a pizza/pasta restaurant in the last three months have been motivated by special promotions/discounts.
- Only one in ten consumers think pizza/ pasta takeaways are good value for money, yet this sector continues to drive the market
- It seems that pizza/pasta restaurant operators have lost their shine, other than as a meal replacement exercise: alongside price promotions driving business, only 16% of consumers (or a quarter of regular users) think pizza/pasta restaurants are good for a special occasion or as a treat.
- The recession has made bargain hunting a more socially acceptable pursuit: value and affordability are today's buzzwords. Mid-market venues such as pizza/pasta restaurants need to make sure they have a strong market positioning either as a low-cost/value operator or a premium economy choice (eg GBK).
- Brand differentiation is a major concern in this market with 17 million consumers believing that menus in all pizza/pasta restaurants are the same.
- Pizza Hut continues to be the most popular brand in the pizza/pasta restaurant market with around 11 million consumers having visited in the last three months (compared to 7 million Domino's users and 6 million visitors to PizzaExpress).

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