

Pizza and Pasta Restaurants - UK - January 2011

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What is this report about?

This report examines the pizza/pasta restaurant/takeaway market in the post-recession era. It looks at the lingering effects of the market's over-reliance on price promotions, as well as exploring the attempts of various operators to modernise their brands to a more extensive level than has been seen in the market in recent years. The report also looks at the issue of healthy eating and investigates how it has been adopted and capitalised on to varying degrees by brands in the market. Technological developments have also had a particularly strong impact on this market, especially in regards to brand communication and promotion in the takeaway/home delivery sector.

What have we found out?

- Pizza Hut continues to be the most popular brand in the pizza/pasta restaurant market with around a fifth of consumers having visited in the last three months (compared to 16% having visited Domino's and 12% having been to PizzaExpress).
- Pizza/pasta restaurants are missing out on special occasion dining at present: lapsed users tend to be Third Agers who are more likely to eat out for a special occasion, compared to younger consumers who eat out more frequently.
- Upfront offers like BOGOFs are the most popular price promotions/incentives for visiting pizza/ pasta restaurants/ takeaways amongst users, whilst fewer than one in ten are drawn by loyalty cards.
- 'Light' menus are increasingly prevalent in this market, despite the fact that four in ten pizza/pasta restaurant/takeaway users don't care how many calories are in each dish.
- Along with 'light' menus, operators in this market are focusing on tapping into all day dining by introducing new specific breakfast and/or lunchtime ranges as well as new dishes which are suitable for a wide range of meal occasions (eg 'pizzettes' mini pizza breads).
- Modernisation programmes (eg PizzaExpress's Living Lab) are now under way in a market which has struggled with market positioning and brand differentiation in recent years. Pizza Hut UK's Managing Director has also hinted at a future rebranding exercise as he was quoted as saying the brand wanted to shake off its image of 'fast food plus'.

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