## Pizza Restaurants - US - November 2015

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

"Pizza has a long history in the United States as a favorite dish for diners of all ages. And while pizza restaurants are ubiquitous, there has been a surge in activity in recent years as fast casual pizza restaurants have emerged on the scene and other, established, pizza restaurants are responding to new competition."

- Caleb Bryant, Foodservice Analyst

This report looks at the following areas:

- Pizza restaurant visitation low among older consumers
- Majority of consumers have not yet had fast casual pizza
- Price is a top concern for pizza consumers

Regional fast casual pizza places have begun fighting for market dominance. Technology has become the battleground among the QSR pizza brands as the major players vie for the best and fastest app. There also has been no shortage of flavor innovation, as chains have released both traditional versions of pizza, international mash-ups, and indulgent offerings. Both consumer and menu data reflects the evolving tastes surrounding the pizza category.

## BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA
$+44(0) 2076064533$

Brazil 08000959094

Americas
+1 (312) 9435250

China
+86 (21) 60327300

APAC
$+61(0) 282848100$
EMAI L: reports@mintel.com

## Pizza Restaurants - US - November 2015

Report Price: $£ 2466.89$ | $\$ 3995.00 \mid € 3133.71$

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

Overview
What you need to know
Definition
Executive Summary
The issues
Pizza restaurant visitation low among older consumers
Figure 1: Pizza segment visitation in the past three months, September 2015
Majority of consumers have not yet had fast casual pizzaFigure 2: Fast casual pizza restaurant visitation in the past three months, any occasion, by area, September 2015
Price is a top concern for pizza consumers
Figure 3: Pizza restaurant visitation motivators, September 2015
The opportunities
Appeal to affluent Millennials through premium ingredients
Figure 4: Pizza restaurant visitation motivator, premium pizza toppings, September 2015
Different segments cater to different needsFigure 5: Correspondence Analysis - Pizza restaurant occasions, September 2015
Engage Hispanics with social media/new technologies
Figure 6: Pizza technology utilization in the past year, September 2015
What it means
The Market - What You Need to Know
Increased consumer confidence is especially good for pizza restaurants
Consumers are plugged into technologyDelivery options on the rise
Market Factors

Positive economic outlook bodes well for pizza restaurants
Figure 7: Consumer Confidence Index over time, J anuary 2007-September 2015

## Mobile technology usage continues to grow

Figure 8: Adult ownership of smartphones over time
Explosion in delivery services may threaten pizza
Figure 9: Key players in foodservice delivery
Fast casuals concentrated in urban environments
Figure 10: Fast casual pizza restaurant visitation in the past three months, September 2015
Figure 11: Fast casual pizza restaurant visitation in the past three months, any occasion, by census region September 2015

## Key Players - What You Need to Know

QSRs and tech
The emergence of fast casual pizza

BUY THIS REPORT NOW

## Pizza Restaurants - US - November 2015

Report Price: $£ 2466.89$ | $\$ 3995.00 \mid € 3133.71$

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Trends in FSR pizza

## QSR

QSR Brands battle for technological dominance
Figure 12: Domino's television advertisement
Deliciously weird

## Fast Casuals

Fast casual pizza restaurants fight for top spot
Established brands bet on pizza fast casuals

## FSRs

Luddites beware, tablet use on the rise
Flatbread is a platform for creativity

## What's Next?

Fast casual pizza continue to grow
Can't stop technology
Varied and international ingredients
The real deal

## MMI Analysis

Pizza overview
Figure 13: Growth in incidence of the top 10 menued dishes at all restaurants, Q2 2012-15
Pizza complexity
Cheese please
Healthy crust incidence rises
Lots of sauce

## The Consumer - What You Need to Know

Pizza is a staple for young people
Northeast consumers are pizza purists
There are few health concerns surrounding pizza
Pizza tech/social media utilization has room to expand

## Pizza Restaurant Visitation and Age

QSR pizza leads in overall visitation; young men visit all pizza segments
Figure 14: Pizza segment visitation in the past three months, September 2015
Boomer pizza visitation
Pizza Restaurant Factors and Age
Boomers go for quality, Millennials for innovation
Figure 15: Pizza restaurant statement agreement, September 2015

## Young and Affluent

BUY THIS

## Pizza Restaurants - US - November 2015

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Yuppies drive interest in premium ingredients

Figure 16: Pizza restaurant visitation motivators, premium pizza toppings, September 2015

## Regionality

## Northeast diners are pizza purists

Figure 17: Pizza segment visitation in the past three months, September 2015
Figure 18: Pizza restaurant statement agreement, September 2015
West prefers mash-ups; Midwest is searching for deals
Figure 19: Pizza restaurant visitation motivators, September 2015

## Parents

Parents want pizza ASAP
Figure 20: Pizza segment visitation in the past three months, by parents of child(ren) under 18, September 2015
Figure 21: Pizza restaurant statement agreement, by parents of child(ren) under 18, September 2015
Figure 22: Pizza technology utilization in the past year, by parents of child(ren) under 18, September 2015

## Health and Pizza

Pizza does not garner health concerns
Figure 23: Pizza restaurant statement agreement, by parents of child(ren) under 18, September 2015

## Race

## Asians are forward-thinking foodies

Figure 24: Pizza restaurant visitation motivators, September 2015
Whites and Blacks are traditionalists; Blacks are app-savvy

## Hispanics

Hispanics crave pizza, are heavy technology users
Figure 25: Pizza segment visitation in the past three months, September 2015
Figure 26: Pizza technology utilization in the past year, September 2015

## Age and Technology Utilization

Technology has room to grow
Figure 27: Pizza technology utilization in the past year, September 2015
45 is the technological "drop off" age
Figure 28: Pizza technology utilization in the past year, September 2015
Affluent Millennials drive tech usage
Figure 29: Technology utilization in the past year, September 2015

## Pizza Segment Visitors

Pizza restaurants have high cross-utilization
Figure 30: Segment visitation in the past three months, September 2015
Figure 31: Segment visitation in the past three months, September 2015
QSR pizza restaurant customers are hunting for deals, are low technology utilizers
Figure 32: Pizza restaurant statement agreement, "I would try out a new pizza restaurant if they offered me a promotional price", September 2015

## Pizza Restaurants - US - November 2015

Report Price: $£ 2466.89$ | $\$ 3995.00 \mid € 3133.71$

Ref Price. 22466.8 change due to currency fluctuations.

## Breakfast/dessert pizzas may perform well at C-stores

Figure 33: Pizza restaurant visitation motivators, "Pizza for times outside of lunch or dinner", September 2015

## Correspondence Analysis

## Methodology

Consumers visit different pizza segments to fulfill different needs
Figure 34: Correspondence Analysis - Pizza restaurant occasions, September 2015
Realistic areas of improvement

## Visitation Motivators

Deals motivate more than food
Figure 35: Pizza restaurant visitation motivators, September 2015

## Pizza Toppings

Pepperoni is the top meat
Mozzarella is most popular cheese, watch for more varieties
Consumers split between crusts
Vegetable/fruit preferences vary
Sauce
Figure 36: Pizza topping appeal and MMI growth, vegetables/fruits, meats, September 2015
Figure 37: Pizza topping appeal and MMI growth, sauces, cheeses, September 2015

## Pizza Toppings, TURF Analysis

Methodology
Meats - TURF
Figure 38: TURF analysis - Pizza meats and proteins, September 2015
Crust and veggies - TURF
Figure 39: TURF analysis - Pizza fruits and vegetables, September 2015
Figure 40: TURF analysis - Pizza crusts, September 2015

## Social Media Analysis

## Methodology

Pizza overview
QSR brands have the most mentions, but fast casuals elicit passion
Figure 41: Passion scores by pizza restaurant, October 2014-October 2015

## Appendix - Data Sources and Abbreviations

Consumer survey data
Mintel Menu Insights
Abbreviations and terms
Abbreviations

## Appendix - TURF Analysis

Figure 42: Appeal of pizza toppings/crusts

## Pizza Restaurants - US - November 2015

## Appendix - The Market

Figure 43: Adult ownership of smartphones over time

