

Pizza and Italian Restaurants - UK - 2021

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This report looks at the following areas:

- The impact of COVID-19 on the pizza/Italian restaurant and takeaway/home delivery sectors.
- Consumers' intentions to use pizza/Italian restaurants in the next 12 months.
- How much consumers are willing to pay for pizza and pasta dishes when eating in at a pizza/Italian restaurant.
- Consumers' interest in non-core menu items (beyond pizza and pasta), as well as interest in pizza/Italian restaurant-branded grocery items.
- Consumers' perceptions of key pizza and Italian restaurant brands – Domino's, Pizza Hut, Papa John's, PizzaExpress and Franco Manca.

While dining in pizza/Italian restaurants has been badly affected by COVID-19, the takeaway and home delivery segment has weathered the storm much better. More than half (52%) of Britons ordered a pizza takeaway in the 12 months to July 2021 compared to just 23% who dined in.

The pandemic has therefore had a profound impact on pizza/Italian restaurant operators that rely on diners eating in, resulting in some brands closing sites and using CVAs to restructure their debts. Even pizza and Italian restaurant operators that were trading strongly prior to COVID-19 were not immune to the crisis, including the Azzurri Group – owner of the ASK Italian, Zizzi and Coco Di Mama brands.

The unprecedented challenges of Brexit have provided further disruption for pizza/Italian restaurant operators, contributing towards a shortage of both staff and raw materials (goods traded between the UK and the EU now face extensive customs and regulatory checks, adding additional cost and complexity to cross-border trade). Meanwhile, a weaker Pound has seen some operators that source ingredients from outside the UK notice increases in their food input prices.



“While dining in pizza/Italian restaurants has been badly affected by COVID-19, the takeaway/home delivery segment has weathered the storm much better. Much of takeaway sales' growth comes against a background of continuing investments in digital innovation by the big brands and marketing and promotional activities.”

– **Trish Caddy, Senior Foodservice Analyst**

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Pizza/Italian takeaways can lay a guilt trip on some people for not cooking meals from scratch. We know that many of those who are planning to order takeaway in the next 12 months are also interested in buying pizza/Italian restaurant-branded ingredients. Therefore, a cross-selling strategy which includes restaurant-branded ingredients as part of a pizza/Italian restaurant takeaway/home delivery offering is likely to bridge the gap between people's desire to cook from scratch and order takeaways. And most importantly, boost revenue and broaden appeal.

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