

Pizza and Italian Restaurants - UK - 2022

Report Price: £2195 | \$2995 | €2600

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

This report looks at the following areas:

- The impact of the rising cost of living on the pizza/Italian restaurant and takeaway/home delivery sectors.
- Annual changes in consumer usage of pizza/Italian restaurants and takeaway/home delivery services.
- Annual changes in the way consumers access pizza/Italian takeaway/home delivery services.
- Most popular types of dishes ordered from pizza/Italian restaurants and takeaways.
- Key factors when choosing pizza/Italian restaurants and takeaway/home delivery services.
- Consumer attitudes towards pizza/Italian restaurants and takeaway/home delivery services.
- Consumers' perceptions of key pizza and Italian restaurant brands – Domino's, Pizza Hut, Papa John's, PizzaExpress and Zizzi.

More than half (51%) of Britons ordered takeaway from a pizza/Italian restaurant in the 12 months to June 2022, as opposed to 29% who ate in. The takeaway/home delivery momentum generated throughout the pandemic has yet to subside, even after all COVID-19 restrictions have lifted, with the value of the pizza/Italian takeaway/home delivery segment expected to reach £2.9 billion in 2022, while the dine-in segment lags behind at £2.2 billion.

The biggest immediate threat to the market is inflation, as some consumers rein in expenditure on eating out. However, some of the negative impact of inflation on market value will be offset by the rise in average order value. This is where operators need to demonstrate added value and help justify price increases as older and well-off consumers are most likely to splurge on an occasional high-quality pizza/Italian dining experience.

Consumer behaviour within the pizza/Italian foodservice market continues to be polarised, even within the same demographic groups. For instance, 16-34



“The takeaway/home delivery momentum generated throughout the pandemic has yet to subside even after all COVID-19 restrictions have lifted, with younger consumers continuing to drive demand for a greater range of takeaway options including click-and-collect services.”

– Trish Caddy, Senior Foodservice Analyst, September 2022

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Pizza and Italian Restaurants - UK - 2022

Report Price: £2195 | \$2995 | €2600

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

year olds are most willing to pay more for authentic pizza/Italian dishes and are also most likely to agree that branded pizza/Italian foods sold in supermarkets are just as tasty as those offered by restaurants. The rising cost of living threatens to push more consumers toward the grocery sector as they seek cheaper alternatives.

Demand for pizza-by-the-slice is high. With 65% of 16-44 year olds agreeing that buying single pizza slices is convenient for eating on the go (vs 61% of total), younger consumers prefer to feed themselves pizza in smaller units in a bid to consume less and waste less, without lessening their satisfaction for their favourite takeaway food.



What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

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

Table of Contents

OVERVIEW

- Key issues covered in this Report
- Market context
- Products covered in this Report

EXECUTIVE SUMMARY

- **The five-year outlook for pizza/Italian restaurants and takeaways**

Figure 1: Category outlook pizza/Italian restaurants and takeaways, 2022-27

- **The market**
- **Total pizza/Italian foodservice market set to recover in 2022**

Figure 2: UK forecast for the value of the pizza/Italian restaurants dine-in and takeaway/home delivery market, at current prices, 2017-27

- **Dine-in market to be challenged by lower-cost alternatives**

Figure 3: UK forecast for the value of the pizza/Italian restaurants dine-in market, at current prices, 2017-27

- **Takeaway market to continue its momentum**

Figure 4: UK forecast for the value of the pizza/Italian restaurants dine-in and takeaway/home delivery market, at current prices, 2017-27

- **Companies and brands**
- **Domino's offers the most excellent experience**

Figure 5: Key metrics for selected brands, 2022

- **Pizza/Italian brands were food focused in their 2021 adspend**

Figure 6: Advertising expenditure by selected pizza/Italian restaurants or takeaway/home delivery brands, 2018-22

- **The consumer**
- **One in four Britons dining in pizza/Italian restaurants**

Figure 7: Annual changes in usage of pizza/Italian restaurants, 2021-22

- **Direct ordering fell slightly between 2021 and 2022**

Figure 8: Annual changes in pizza/Italian takeaway ordering methods, 2021-22

- **Tempting over-45s with thin pizzas, pastas and risottos**

Figure 9: Types of pizza/Italian items ordered, by age groups, 2022

- **Consumers are divided on cheese**

Figure 10: Key factors when choosing pizza/Italian, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

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

- **16-34s drive demand for sustainability and technology**
Figure 11: Attitudes towards pizza/Italian restaurants and takeaways, 2022

ISSUES AND INSIGHTS

- **Impact of cost-of-living crisis on pizza/Italian foodservices**
- **Bundle deal pricing strategy**
- **App-exclusive deal strategy**
- **Collection deal strategy**
- **Tiered-pricing strategy**
- **Decoding the polarisation of spend**
- **Low-cost vs premiumisation**
- **Supermarket ranges vs on-premise experiences**
- **Demand for sustainable convenience**
- **Reusable food containers**
- **Using local ingredients**
- **Using all edible parts**
- **Pizza by the slice**

MARKET SIZE AND PERFORMANCE

- **Total pizza/Italian foodservice market set to recover in 2022**
Figure 12: Total value of pizza/Italian restaurants dine-in and takeaway/home delivery market, 2017-22
- **Dine-in segment 13% shy of its 2019 value**
Figure 13: Market size for value of pizza/Italian restaurants dine-in market, 2017-22
- **Takeaway segment grew 8.5% from £2.7 billion in 2021**
Figure 14: Market size for value of pizza/Italian restaurants takeaway/home delivery market, 2017-22

MARKET FORECAST

- **The five-year outlook for pizza/Italian restaurants' dine-in and takeaway/home delivery market**
Figure 15: Category outlook pizza/Italian restaurants and takeaways, 2022-27
- **Total market to continue its recovery despite economic headwinds**
Figure 16: UK forecast for the value of the pizza/Italian restaurants dine-in and takeaway/home delivery market, at current prices, 2017-27
- **Dine-in market to be challenged by lower-cost alternatives**
Figure 17: UK forecast for the value of the pizza/Italian restaurants dine-in market, at current prices, 2017-27

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

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

- **Takeaway market to continue its momentum**

Figure 18: UK forecast for the value of the pizza/Italian restaurants dine-in and takeaway/home delivery market, at current prices, 2017-27

- **Learnings from the last income squeeze**
- **Forecast methodology**

MARKET DRIVERS

- **Demand for takeaways is driving growth of the foodservice market**

Figure 19: Leisure activities, 2019-22

- **Consumer behaviour is polarised**

Figure 20: Preferred pub/restaurant responses to rising costs, 2022

- **Inflation is the key concern for consumers and brands... and will weigh down the post-COVID recovery**
- **Consumer spending power will be curbed**
- **The conflict in Ukraine is hurting the UK economy in a number of ways**
- **Employment has held up better than expected**
- **Consumers' financial wellbeing has fallen from the highs of 2021...**

Figure 21: Household financial wellbeing index, 2016-22

- **...and most people are feeling the effects of price rises**

LAUNCH ACTIVITY AND INNOVATION

- **Out-of-home pizza/Italian food more accessible than ever**
- **Neighbourhood food halls**
- **Multi-branded delivery-only concepts**
- **Blurring category lines**
- **Playing into the leisure sector**
- **Crossing over to retail**

Figure 22: Examples of pizza/Italian restaurant-branded supermarket ready-meals, 2022

ADVERTISING AND MARKETING ACTIVITY

- **Pizza/Italian brands were food focused in their 2021 adspend**

Figure 23: Advertising expenditure by selected pizza/Italian restaurants or takeaway/home delivery brands, 2018-22

- **Value propositions the main focus for 2022's budget**

Figure 24: PizzaExpress Club app offer, 2022

- **Nielsen Ad Intel coverage**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

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

BRAND RESEARCH

- Brand map**
Figure 25: Attitudes towards and usage of selected brands, 2022
- Domino's offers the most excellent experience**
Figure 26: Key metrics for selected brands, 2022
- Well-off groups drive usage**
Figure 27: Usage of brands in the last 12 months, by socio-economic group and household income, 2022
- Younger generations are core users**
Figure 28: Usage of brands in the last 12 months, by generation, 2022
- Brand attitudes: opportunities to enhance healthy perceptions**
Figure 29: Attitudes, by brand, 2022
- Brand personality: brands are considered accessible**
Figure 30: Brand personality – Macro image, 2022
- Brand personality: PizzaExpress is most authentic**
Figure 31: Brand personality – Micro image, 2022

ANNUAL CHANGES IN USAGE

- One in four Britons dining in pizza/Italian restaurants**
Figure 32: Annual changes in pizza/Italian restaurant participation, 2021-22
- Consumers continue to drive demand for takeaway options**
Figure 33: Annual changes in usage of pizza/Italian restaurants, 2021-22

ANNUAL CHANGES IN TAKEAWAY ORDERING METHODS

- Direct ordering fell slightly between 2021 and 2022**
Figure 34: Annual changes in pizza/Italian takeaway ordering methods, 2021-22

TYPES OF ITEMS ORDERED

- Tempting over-45s with thin pizzas, pastas and risottos**
Figure 35: Types of pizza/Italian items ordered, by age groups, 2022
- Restaurant diners are more adventurous**
Figure 36: Types of pizza/Italian items ordered, by usage of pizza/Italian restaurants, 2022
- Narrow repertoires as people stick to one type of menu item**
Figure 37: Repertoire of types of pizza/Italian items ordered, by age groups, 2022

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

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

KEY FACTORS WHEN CHOOSING PIZZA/ITALIAN RESTAURANT

- **Consumers are divided on cheese**
Figure 38: Key factors when choosing pizza/Italian, 2022
- **Value menu options and customisation appeal to half of pizza/Italian foodservice consumers – TURF analysis**
Figure 39: TURF Analysis – Pizza and Italian Restaurants, June 2022
Figure 40: Gluten Free Cauliflower Pizza Base, by Whole Creations

ATTITUDES TOWARDS PIZZA/ITALIAN RESTAURANTS

- **Older diners occasionally enjoy indulging in pizza/Italian food**
Figure 41: Attitudes towards pizza/Italian restaurants and takeaways, 2022
- **16-34s drive demand for sustainability...**
Figure 42: Attitudes towards pizza/Italian restaurants and takeaways, 2022
- **...and technology**
Figure 43: Attitudes towards pizza/Italian restaurants and takeaways, 2022
- **Pizza by the slice is convenient for 16-44s**
Figure 44: Attitudes towards pizza/Italian restaurants and takeaways, 2022
- **Supermarket ranges threaten pizza/Italian foodservices**
Figure 45: Attitudes towards pizza/Italian restaurants and takeaways, 2022

PIZZA/ITALIAN RESTAURANT CONSUMER SEGMENTATION

Figure 46: Pizza/Italian restaurant consumer segmentation – Cluster analysis, 2022

- **Typical characteristics of each group**
- **Value Seekers**
- **Savvy Consumers**
- **Conscious Consumers**
Figure 47: Key factors when choosing pizza/Italian restaurants, by consumer segmentation, 2022

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**
- **TURF Analysis methodology**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

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

Figure 48: Table – TURF Analysis – Pizza and Italian Restaurants, June 2022

- **Cluster analysis group definitions**
- **Accessibility**
- **Mindfulness**
- **Value**

APPENDIX: FORECAST METHODOLOGY

- **Market forecast and prediction intervals**

Figure 49: Market forecast for the value of the pizza/Italian dine-in and takeaway market, 2017-27

Figure 50: Market forecast for the value of the pizza/Italian dine-in market, 2017-27

Figure 51: Market forecast for the value of the pizza/Italian takeaway market, 2017-27

- **Market drivers and assumptions**
- **Forecast methodology**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.