

## **Chapter 1: Executive Summary**

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- Report Scope

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### **Report summary**

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##### Summary analysis

- The restaurant side

- The retail side

#### **Pizza Use by Channel & Type**

##### Summary analysis

#### **Food Consumption & Migration Trends: Placing Pizza in Context**

##### Summary analysis

#### **Pizza on the Menu: Menu Trend Analysis**

##### Summary analysis

#### **Restaurant Pizza Purchase Decision and Eating Experience**

##### Summary analysis

#### **Delivery v. Pickup, Chain v. Independent & Menu Item Ordering**

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##### Summary analysis

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##### Summary analysis

- Nestlé USA

- Schwan

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##### Domino's

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- New menu introduction analysis

- Customer segmentation by mobile device interaction

- Key consumer groups

- 2009-2012 Guest traffic frequency analysis

##### Little Caesars Pizza

- New menu introduction analysis

- Promotional activity

- Technology innovation

- Key consumer groups

- 2008-2012 Guest traffic frequency analysis

##### Papa John's

- Branding that reflects quality positioning

- Strategy paying off

- Innovation and activity

- New menu introduction analysis

- Promotional activity
- Technology innovation
- Customer segmentation by mobile device interaction
- Key consumer groups
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- 2008-2012 Guest traffic frequency analysis: positive momentum

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Message to pizza purveyors

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Anemic pizza health marketing ties

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June 2012: DiGiorno, CPK and Tombstone

May 2012: Kashi Four Cheese Pizza

April 2012: Frozen Naked Pizza & Bold Organics Pizza

April 2012: Udi's Gluten-Free Frozen Pizza  
March 2012: Annie's Organic-Rising Crust Pizza  
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Pizza attributes are the strongest draw

But it's not just about pizza

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Gender: tilt marketing messages to emphasize value and convenience

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Age analysis: play up the craving

Table 6-2: Pizza Ordering Influencers: Ranking Scores, By Age, 2012

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Table 6-3: Pizza Ordering Influencers: Ranking Scores, HH Income, 2012

Race/ethnicity analysis

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Community and sharing

Coupons usage opens doors for targeted marketing

Continue to target established routines

When schedules overtake us, send pizza to the rescue

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Age: community and sharing

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Kids: where do we start?

Table 6-7: Restaurant Pizza Eating Rationales, By HH Income, 2012

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Family & kids trump eating alone

Satisfaction? Yes. Over indulgence? Not really.

Couponing a significant force

Healthy options? Where?

Graph 6-3: Consumer Pizza Restaurant Eating Participants, Over Eating, Promotions & Healthy Option Awareness, 2012

Eating participants

Gender: family differential

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Over eating, promotions & healthy option awareness

Gender

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### **Introduction**

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More takeout/delivery users influenced by “ease of pizza” factors

Table 7-2: Consumer Restaurant Pizza Eating Rationales, by Eat-In v. Takeout/Delivery, 2012

#### **Pizza chains dominate**

Table 7-3: Pizza Procurement: Major Pizza Chain, Local Independent Pizza Restaurant, Non-Pizza Restaurant, Demographic Assessment, 2012

Eating on site more likely at local independents and on-pizza restaurants

Table 7-4: Pizza Procurement: Major Pizza Chain, Local Independent Pizza Restaurant & Non-Pizza Restaurant, by Eat-In v. Takeout/Delivery, 2012

So, what did you order at the pizza restaurant?

Non-pizza entrées, in aggregate, contribute strongly to order

Salad: the healthy holdout

Drinks, please

Graph 7-1: Food and Drink Ordered During Last Visit to Pizza Restaurant, 2012

Larger orders: younger patrons

Table 7-5: Food and Drink Ordered During Last Visit to Pizza Restaurant, by Age, 2012

HH Income

Table 7-6: Food and Drink Ordered During Last Visit to Pizza Restaurant, by HH Income, 2012

Race/ethnicity

Table 7-7: Food and Drink Ordered During Last Visit to Pizza Restaurant, by Race/Ethnicity, 2012

Menu ordering: Eating at restaurant v. takeout/delivery

Table 7-8: Food and Drink Ordered During Last Visit to Pizza Restaurant, by Eat-In v. Takeout/Delivery, 2012

## **Chapter 8: Pizza Uptake Motivators**

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#### Summary analysis

- Healthier pizza needed to increase usage
- Personal size
- On-the-go convenience
- An international/ethnic twist
- But a hard sell to some

#### Graph 8-1: Motivators to Eat Pizza More Often, 2012

#### Gender

#### Table 8-1: Motivators to Eat Pizza More Often, by Gender, 2012

#### Age: experiment with youth

#### Table 8-2: Motivators to Eat Pizza More Often, by Age, 2012

#### HH Income: health hits higher notes

#### Table 8-3: Motivators to Eat Pizza More Often, by HH Income, 2012

#### Race/ethnicity

#### Table 8-4: Motivators to Eat Pizza More Often, by Race/Ethnicity, 2012

#### Healthy foods & home cooked meals: trends on the rise

#### Graph 8-2: Food Consumption Trends: Eating More, Same & Less

#### Significant effect on pizza uptake motivators

- More healthful eating translates to healthy pizza motivation
- Less healthy eating translates to personal size and on-the-go pizza motivation

#### Table 8-5: Food Consumption Trends: Eating More, Same & Less:

#### Motivators to Eat Pizza More Often

### **Introduction**

#### Summary analysis

- Nestlé USA

## **Chapter 9: Retail Pizza Manufacturer, Brand & New Product Analysis**

- Schwan
- General Mills

#### Frozen pizza long-term trend: positive; short-term trend: negative

#### Table 9-1: HH Frozen Pizza Eating & Eating Frequency, 2006-2012

#### Brand usage trending

- DiGiorno strengthens brand leadership

#### Table 9-2: HH Frozen Pizza Brand Penetration and Engagement, 2006-2012

### **Nestlé USA, Inc.**

#### Company Overview

#### Kraft acquisition consolidates pizza supremacy

#### King of pizza sales

- Superpremium taking a bigger hit

#### DiGiorno remains jewel in the pizza crown

#### Table 9-3: Nestlé Frozen Pizza Sales, by Brand and Line Extension, 2011-2012

#### Brand by brand

- DiGiorno consumer usage drivers

- High-frequency engagement driven by 18-34s, blacks, and <\$50K households

#### Table 9-4: DiGiorno Frozen Pizza: Key Users and High-Frequency Users

- New offerings
- Recession aids DiGiorno's fight with pizza chains
- Advertising makes targeting of pizza chains crystal clear
- Going after sports

## Tombstone

### Tombstone consumer usage foundation

- High-frequency engagement underscores importance of lower incomes & black consumers

### Table 9-5: Tombstone Frozen Pizza Use and High-Frequency Use: Key Users

#### New offerings

- Stouffer's and Stouffer's Lean Cuisine

### California Pizza Kitchen: suffering from neglect or the recession?

### Jack's Pizza virtually unchanged

- Usage patterns change significantly according to frequency of use
- General engagement driven by 18-34s, households with kids, middle-income bracket & region
- High-frequency engagement dispersed across many groups

### Table 9-6: Jack's Frozen Pizza Use and High-Frequency Use: Key Users

## **The Schwan Food Company**

### Pizza-centricity

### Table 9-7: Schwan Frozen Pizza Sales, by Brand and Line Extension, 2011-2012

### Red Baron

### Freschetta

- Promotions
- Tony's
- LiveSmart Schools
- Villa Prima

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### Totino's

- On-the-go innovation
- Promotional activity

## Introduction

## **California Pizza Kitchen**

### Company overview

### Restaurant snapshot

### Menu overview

## **Chapter 10: Pizza Restaurant Brand Analysis**

### Marketing & brand activity

### Innovation and activity

### Menu innovation

- Healthier introductions
- New dessert Strawberry Shortcake
- Natural Chicken and Gluten-Free Crust
- Cutting what doesn't work

### Table 10-1: California Pizza Kitchen New Offerings: XXX

### Promotional activity

- Facebook fans get a "thank you"
- Gift cards
- Alabama tornado relief

Technology innovation

CPK attracts Mobile Professionals

Graph 10-1: California Pizza Kitchen Usage Frequency Mobile Segmentation Analysis

The California Pizza Kitchen Consumer

Key consumer groups

- General “any” use

- Engaged users

Table 10-2: California Pizza Kitchen Engagement: Key Users

2008-2012 Guest traffic frequency analysis:

CPK customer attitudes about food

Customer segmentation by food lifestyle

- True Foodies

- But Variety on a Budget isn’t far behind...

Graph 10-2: California Pizza Kitchen Usage Frequency Food Segmentation Analysis

**Domino’s Pizza**

Company overview

Menu overview

Growth strategy

Innovation and activity

Menu innovation

- Higher quality products timed with well executed promotions

- Product reformulation pays huge dividends

- Balancing low-price promotions with higher quality introductions

- Artisan Pizza promises quality; provides upselling ammunition

- Domino’s Smart Slice school lunch program meets USDA school nutrition criteria

New menu introduction analysis

- On trend with gluten free

- New pizzas, breads and sides making their way onto the menu

Table 10-5: Domino’s New Offerings: Pizza

Sides and apps up the flavor ante

Table 10-6: Domino’s New Offerings: Bread & Sides

Promotional activity

- Global Domino’s Day promotion

- ShopRunner promotion

- Carryout promotion

- Cyber Monday

Technology innovation

- iPhone app passes \$1 million in weekly sales

- Domino’s launch Android app

- Q2 2012 on track for growth

Customer segmentation by mobile device interaction

- A strong connection to highly engaged mobile phone users

Graph 10-3: Domino’s Usage Frequency Mobile Segmentation Analysis

- PULSE generating online sales

- Call center builds incremental sales

The Domino’s Consumer

Key consumer groups

- General “any” use

- Engaged users: youth and non-white racial/ethnic groups drive sales

- Highly engaged users: HH income becomes much more important

Table 10-7: Domino's Pizza Engagement: Key Users

2009-2012 Guest traffic frequency analysis

Table 10-8: Domino's Guest Traffic Trends, 2009-2012

Domino's delivers to Hispanics

Table 10-9: Domino's Location & Hispanic Population Analysis

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Table 10-10: Domino's Hispanic Guest Traffic Trends, 2009-2012

Customer segmentation by food lifestyle

Graph 10-4: Domino's Usage Frequency Food Segmentation Analysis

Sales performance

2012 on solid footing

Table 10-11: Domino's, Selected Metrics, 2007-11

### **Little Caesars Pizza**

Company overview

Menu overview

Brand strategy

Marketing & brand activity

"Pizza! Pizza!" returns

New menu introduction analysis

New varieties of Caesar Wings

Promotional activity

\$5 Hot-N-Ready pizza

Crazy Bread during basketball

Crazy Bread during football

Crazy Bread for Veterans Day

Gift card moves

Card Rewards with Discover card

Technology innovation

iPhone app

But the app has its limitations...

Customer segmentation by mobile device interaction

Graph 10-5: Little Caesar's Usage Frequency Mobile Segmentation Analysis

The Little Caesar's Consumer

Key consumer groups

General "any" use

Engaged users:

Highly engaged users:

Table 10-12: Little Caesar's Engagement: Key Users

2008-2012 Guest traffic frequency analysis:

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Customer segmentation by food lifestyle

6+ visits a month attracts Variety on a Budget

Graph 10-6: Little Caesar's Usage Frequency Food Segmentation Analysis

CNN calls Little Caesars a good franchise bet

Merchandise on its website

### **Papa John's**

Company overview

Restaurant snapshot

## Menu overview

### Brand strategy

- Branding that reflects quality positioning
- Strategy paying off

### Marketing & brand activity

- Loyalty and gift card programs

### Innovation and activity

#### Menu innovation

#### New menu introduction analysis

- Chicken Parmesan Pizza LTO
- Buffalo Chicken Pizza LTO
- Classic Sausage & Peppers Pizza LTO

#### Table 10-14: Papa John's New Offerings: XXX

- Pizza combinations flex value positioning

#### Promotional activity

- Advertising matters
- "1040" Special for tax day pro-crustinators

#### Relationship with NFL

- NFL and Pepsi
- 1 Million Pizza NFL Giveaway
- Super Bowl XLVI Coin Toss lands on "heads"
- Papa John's offered free pizza if Super Bowl went into overtime
- Papa John's heart-shaped pizza
- "Tools for Teacher" 2011 Collection Drive
- Celebrates opening 3,000th North American restaurant

#### Technology innovation

- First company to reach \$2 billion in online sales
- Papa John's turned to Radware for fast delivery
- Android and iPhone app explosion
- Online pizza loyalty program
- Mixing pizza with politics exposes social media dangers

#### Customer segmentation by mobile device interaction

#### Graph 10-7: Papa John's Usage Frequency Mobile Segmentation Analysis

#### The Papa John's Consumer

#### Key consumer groups

- General "any" use
- Engaged users: age reversal, racial/ethnic disparity, solidly middle class- and family-driven
- Highly engaged users: women?

#### Table 10-16: Papa John's Engagement: Key Users

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#### Table 10-17: Papa John's Guest Traffic Trends, 2009-2012

#### Customer segmentation by food lifestyle

- 6+ visits a month attracts Variety on a Budget

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#### Sales performance

- Sales growth trending upward
- Unit expansion continues
- International growth outpaces domestic growth

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## **Papa Murphy's**

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Menu overview

Innovation and activity

Menu innovation

New menu introduction analysis

Mini Murph Make-n-Bake Pizza Kit

Table 10-19: Papa Murphy's New Offerings: 2011-2012

Table 10-20: Papa Murphy's New Offerings: 2011

Promotional activity

Tax Day Special

Relay For Life Program

Marketing & brand activity

\$35 million ad campaign

Take 'N Grill Giveaway

Lumberjack Pizza Contest

Technology innovation

Phizzle mobile marketing relationship extended

Redemption rates look promising

Customer segmentation by mobile device interaction

Pragmatic Adopters: engaged users who value brand attributes, not mobile connectivity

Highly engaged Social Connectors and Mobile Professionals differentiate brand

Graph 10-9: Papa Murphy's Usage Frequency Mobile Segmentation Analysis

The Papa Murphy's Consumer

General "any" use

Engaged users

Highly engaged users

Table 10-21: Papa Murphy's Engagement: Key Users

2008-2012 Guest traffic frequency analysis

Table 10-22: Papa Murphy's Guest Traffic Trends, 2008-2012

Customer segmentation by food lifestyle

Graph 10-10: Papa Murphy's Usage Frequency Food Lifestyle Segmentation Analysis

Sales performance

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## **Pizza Hut**

Menu overview

Growth strategy

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Innovation and activity

SuperBowl Sunday a Bonanza

Menu innovation

New menu introduction & promotion analysis

P'Zolo takes aim at subs

Subway Takeover promotion drives home message

Pizza crusts and breads making way onto menu

Ultimate Cheese Lover's Pizza Deal

Ultimate Stuffed Crust Pizza

Cheesy Bites introduction gets a supporting cast of characters

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Spreading the wealth with family deals

Big Dinner Box promotion and Red Roof Wednesday

- GameStop tie-in
- \$10 Any Pizza Deal

#### Table 10-24: Pizza Hut New Offerings: Family Meals & \$10 Deals

##### Promotional activity

- Tim Tebow partnered with BOOK IT!
- P'Zone Promotion
- Pizza Hut Partners with Zynga to Benefit Hunger Relief

##### Technology innovation

- Pizza Hut offers mobile ordering apps

##### Customer segmentation by mobile device interaction

- Drawing from Mobile Generation and Social Connectors

#### Graph 10-11: [Company] Usage Frequency Mobile Segmentation Analysis

##### The Pizza Hut Consumer

##### Key consumer groups

- General "any" use: youth, region, and race
- Engaged users: youth, region, and race
- Highly engaged users: HH income adds a twist

#### Table 10-25: Pizza Hut Engagement: Key Users

##### 2008-2012 Guest traffic frequency analysis

#### Table 10-26: Pizza Hut Guest Traffic Trends, 2008-2012

##### Customer segmentation by food lifestyle

- Engaged users
- Highly engaged users

#### Graph 10-12: Pizza Hut Usage Frequency Food Segmentation Analysis

##### Methodology

- Consumer survey methodology
- Market size and forecast

## Appendix

- Retail pizza manufacturer and brand sales
- Menu item trend analysis

##### Report table interpretation

##### Consumer engagement

- Pizza restaurants
- Frozen pizza

##### Terms & definitions

- Supermarkets
- Restaurant categories
- Limited-service restaurant definitions
- Full-service restaurant definitions
- Other definitions