

# PIZZA LOVERS IN AMERICA 2015

Unexpected Findings  
From a Generational  
Look At Pizza Trends



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“America’s pizza lovers are likely not whom you envision. When we dove into the research, we discovered that the people who buy pizza at least once a month and order pizza at a restaurant at least once a month are not of the demographic that most restaurant and retail leaders assume.

Understanding the actual makeup of today’s pizza lovers—in particular, the emergence of Millennials—will have a significant effect on every pizza retailer and restaurant. We are excited to deliver research findings that separate fact from fiction and to give leaders the insight they need to make the most of changing pizza trends.””

- Jason Dorsey and Sameer Shah  
Study co-authors



# Pizza in America: Today's Customer Is Changing the Marketplace

America loves pizza.

But America is changing, and so are its interactions with pizza.

For the first time in American history, there are four generations of adults shopping, buying and consuming pizza bought from retailers and via restaurants.

The four generations in the marketplace include:

- Millennials (aka Gen Y) – Born 1977 to 1995
- Generation X – Born 1965 to 1976
- Baby Boomers – Born 1946 to 1964
- Traditionalists – Born 1945 and before

The tidal wave entry of 80 million Millennials now entering the US pizza market has created a host of new challenges and opportunities. The change of pace is only going to accelerate as Millennials' spending grows over the next ten years. In fact, Millennials are likely to outspend Baby Boomers as soon as 2017!

At The Center for Generational Kinetics, we have studied Millennials as customers and consumers for many years. Our work with retailers and restaurants has revealed several challenges already perplexing retailers and pizza restaurants large and small across the United States:

- Millennials communicate and shop differently from other generations. This includes an increased reliance on social media and mobile technology.
- Millennials make selections and purchases differently, from not carrying cash for spontaneously buying a slice of pizza to searching for digital coupons after they've already ordered.
- Millennials are delaying many traditional markers of adulthood until later in life, so they are establishing families and making related purchasing decisions at an older age than did previous pizza generations. This affects both retail shopping and restaurant decisions.
- Millennials are the most connected generation in US history, but that does not automatically mean they are the best informed when it comes to restaurants or retail purchases. Instead, it means that Millennials rely on technology more than any other generation does when collecting information to ultimately make a purchasing decision.

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# Pizza in America: Today's Customer Is Changing the Marketplace

We've also uncovered once-in-a-generation opportunities that could be the missing link for retailers and pizza restaurants seeking rapid growth:

- Millennials have the least established brand loyalty. This means they are the generation most "up for grabs" as new retail customers and restaurant patrons. Some marketers think Millennials are disloyal. We do not find this to be the case. Millennials are hugely loyal to brands and restaurants to whom they feel a connection, but many Millennials simply haven't established that loyalty yet. But they will—and soon.
- Millennials have a natural resistance to companies they consider "corporate," those that don't authentically commit to a purpose beyond earning money. This natural resistance represents a seismic shift in the retail and restaurant space in particular. Well-established restaurant brands such as McDonald's and Chili's have previously enjoyed an automatic advantage in winning the next generation of customers but are now starting at a disadvantage given how Millennials perceive many established corporate brands.
- Millennials are often the group most likely to tell their friends about a great pizza experience—whether a frozen pizza or pizza served in a restaurant.
- Millennials have become the leading indicator of how other generations communicate, shop and make purchases. For example, Millennials were the first generation to adopt mainstream social media, but now other generations are using those social media outlets in mass quantities, and in some cases, they're even overtaking Millennials. In fact, Millennials are actually leaving outlets like Facebook in search of new social media outlets that their parents are not yet using. The cycle will be repeated until the next generation, iGen, enters the marketplace.

As more Millennials enter the marketplace, the marketplace will change with them and because of them.

Millennials are the most diverse generation in US history, have more college degrees than any previous generation does, and will be the largest generation in the marketplace within three years. This affects the messaging, marketing, products and overall experience Millennials want as customers and consumers. But what do Millennials really want when it comes to pizza? And are Millennials really that different from other generations? If so, how? Answering those questions—and more—is at the heart of our research and this paper.

## Why We Led This Research

Smart Flour Foods collaborated with The Center for Generational Kinetics to uncover emerging pizza trends across restaurants and retailers in the United States. The goal was to gain an accurate reading of customer and consumer attitudes today—and a preview of important trends going forward.

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# Pizza in America: Today's Customer Is Changing the Marketplace

Understanding the true composition of today's customer has never been more important. Retailers and restaurants offering pizza are in the throes of intense competition across the food spectrum. Every dollar invested to engage customers and consumers must be spent wisely. As additional substitute and alternate options appear within the retail and restaurant spaces, it will only become more important for retailers and restaurants to "get it right" when it comes to engaging Millennials along with every other generation.

Our goal was to **separate the myth and hype from real data** about today's pizza lovers and to uncover crucial emerging trends. Questions we sought to answer include:

- When selecting either a frozen pizza or pizza at a restaurant, which criteria are most important, both to Millennials and other generations?
- Where do the various generations find information about pizza?
- What trends or patterns best reveal the mindset of today's pizza customer and consumer?

## About The Research Methodology

To determine the true mindset, attitude and composition of today's pizza lovers, Smart Flour Foods and The Center for Generational Kinetics led a national study of 1,004 "pizza lovers" in the United States in May 2015. We defined pizza lovers as customers who bought frozen pizza *and* ate pizza at a restaurant at least once a month.

This national study revealed numerous surprising findings about generations and other important differences, particularly gender, that will have an immediate effect on retailers and restaurants.

This white paper will reveal crucial insights and what they could mean for you. It concludes with recommendations for best engaging today's consumer in the retail and restaurant space. We hope you enjoy the findings as much as we enjoyed leading this research study!

Contact us if you'd like to schedule a media interview or inquire about a private research presentation:

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*Understanding the true composition of today's customer has never been more important. Retailers and restaurants offering pizza are in the throes of intense competition across the food spectrum. Every dollar invested to engage customers and consumers must be spent wisely.*

# Finding 1: The Typical Pizza Lover is NOT Who You Think

When you think of a pizza lover—someone over age 18 who buys pizza at a grocery store and eats pizza at a restaurant at least once per month, who do you think of?

Do you have an image of a fraternity party and boxes of pizza stacked in front of a giant television? Or do you think of a line of locals and tourists in Chicago waiting to get into a famous local pizzeria? You might be surprised to learn that the pizza lover in America is not the varsity jacket-wearing fraternity member or the pizza savant who travels around sampling every topping imaginable.

The study revealed that the pizza lover in America looks quite the opposite of popular perception. Here are a few surprising statistics:

- A jaw-dropping 63% of pizza lovers in the United States are women! Of those women 41% are Millennials and 59% are non-Millennials, age 35 or older.
- 53% of pizza lovers are ages 25 to 44. Only 8% are 65 or older.
- 68% of ALL pizza lovers exercise two or more times per week!

This should be a big wake-up call to the industry: people who are buying pizza and eating pizza at restaurants are not whom you think!

## The study revealed that the pizza lover in America looks quite the opposite of popular perception.



**63%** of  
pizza lovers in the  
U.S. are women.

# Finding 2: For Millions of Consumers, the Love of Pizza Is Worth Giving Up Other Things—including Sex

For tens of millions of Americans, pizza is more than a staple; pizza is a favorite food that leads to smiles and brings back great memories. In fact, our research uncovered that 35% of Americans both go out for pizza and buy frozen pizza at the store every month.

But just how far will Americans go to make sure they are able to have their pizza and eat it, too? We dove into the data to understand what a pizza lover would give up before he or she gave up pizza for an entire year. What we found is a surprise and reinforces pizza's prominent role—from family food and celebrations to lunch and dinner mainstays.

- Over 6 million adults (8% of pizza lovers) would give up sex for one year before giving up pizza! Wow.
- 72% of pizza lovers—and 77% of Millennials overall—think it's completely acceptable to eat pizza for breakfast and dinner on the same day. We wonder whether it's the same pizza both times . . .

- 37% of pizza lovers have taken a photo of pizza and posted it online. Are you one of them? If so, you're most likely a Millennial—54% of Millennials have taken a photo of a pizza and posted it online. If you're on Facebook or Instagram, you've probably seen this phenomena.
- 61% of pizza lovers say eating good pizza can be better than bad sex.
- 73% of pizza lovers say that pizza and movies are the "perfect" date night. That number is even higher—at 80%—when it comes to Millennials.



**Over 6 million adults**  
(8% of pizza lovers) **would give up sex** for one year **before giving up pizza.**

# Finding 3: Gluten-Free Options Are Important for Millions of Pizza Lovers

Pizza lovers share that having gluten-free options is important to them and directly affects their pizza buying decisions. While the trend is relatively new and we are still compiling data, the current level of interest in gluten-free pizza and food options leads us to believe that this trend will continue and grow as more Millennials become the heads of their households.

- 31% of pizza lovers say gluten free is important when selecting a frozen pizza. For context, 38% of Millennials say gluten free is important to them when selecting a frozen pizza vs. 26% for those ages 35 and over.
- 65% of pizza lovers who buy gluten-free pizza do not buy it because of a gluten allergy. However, 35% of pizza lovers buy gluten-free pizza because of allergies and would buy regular pizza otherwise. Most notable, over half of all pizza lovers in America (55%) said that if gluten free tasted better, they'd buy it more.
- The impact of gluten-free options also carries into the restaurant space. In fact, 33% of pizza lovers say the availability of gluten-free pizza is important when deciding where to go out for pizza. Again, we see a generational divide, as 37% of Millennial pizza lovers say the availability of gluten-free pizza is important when deciding where to go out for pizza vs. 24% for everyone over the age of 35.

We foresee gluten free continuing to grow as a category as better tasting gluten-free pizza options expand throughout the retail and restaurant markets.

- Gluten free, calories, fat, organic and non-dairy are all far more important with Millennials than with other generations:
  - Gluten free is important for 38% of Millennials; 26% of non-Millennials
  - Number of calories is important for 64% of Millennials; 49% of non-Millennials
  - Fat grams are important for 61% of Millennials; 50% of non-Millennials
  - Organic is important for 52% of Millennials; 37% of non-millennials
  - Non-dairy is important for 38% of Millennials; 19% of non-Millennials

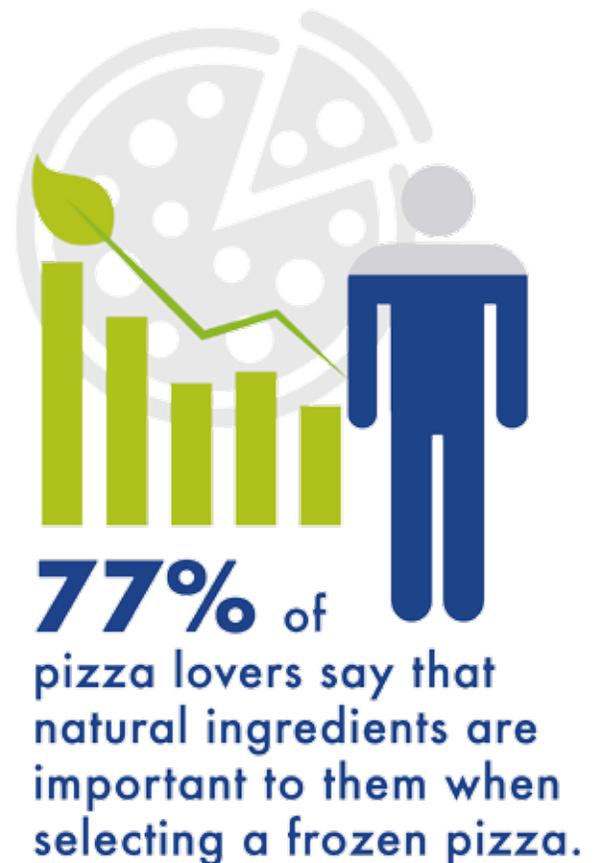
**Millennials** more than any other generation say **gluten free is important** when selecting a frozen pizza or restaurant option



# Finding 4: Natural Ingredients Are Crucial to Pizza Lovers

When it comes to what pizza lovers want in their pizza, the pizza's composition takes on huge influence. Pizza lovers know what they want and, as importantly, what they don't want. Recognizing and adapting to the changing tastes of pizza lovers will be increasingly important as awareness of ingredients and a multitude of options present new opportunities for everyone in retail and restaurants.

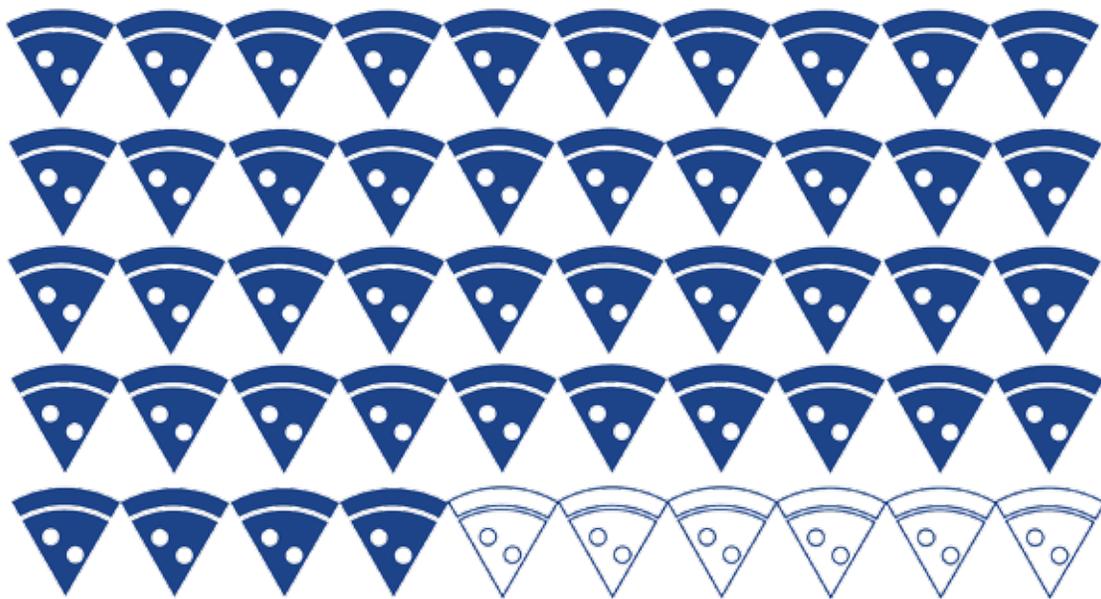
- 77% of pizza lovers say that natural ingredients are important to them when selecting a frozen pizza.
- 60% of pizza lovers try to avoid pizza with unhealthy ingredients. As such, not only do pizza lovers want natural ingredients, they also try to avoid pizza with unhealthy ingredients. This combination will increasingly put pressure to reduce or eliminate artificial or unhealthy ingredients over time.
- Pizza lovers avoid certain additives and ingredients. The top most avoided additives/ingredients lovers avoid in pizza are synthetic hormones (29% avoid), high fructose corn syrup (28% avoid), trans fat (27% avoid), MSG (26% avoid), artificial sweeteners (26% avoid) and artificial preservatives (26% avoid).
- It's not just what is inside a pizza that is critical to pizza lovers, but what is on the top of the pizza! In fact, 79% of pizza lovers say the quality of toppings is very important to them, and 73% say the combination of toppings is very important. Moreover, 66% of pizza lovers say both the quality of the toppings and the combination of the toppings is very important to them. The bottom line: Offer the right options, and you win the pizza lovers' affinity.



# Finding 5: Pizza Lovers Like to Share Their Experience

Pizza is not a solo experience when you are a pizza lover. Maybe this is because pizza is a food that is perfect for sharing—in real time and online. In fact, pizza lovers like to recommend great pizza and restaurants to their friends and family. But what do you think pizza lovers drink when enjoying a pizza? It might not be what you think. Take a look at the following stats the study revealed:

- The vast majority (86%) of pizza lovers have recommended their favorite pizza to their friends and family. That is nearly 9 out of 10 pizza lovers in America! The power of testimonials is a huge opportunity for pizza retailers and restaurants to embrace and to take advantage of.
- Millennials tend to use online and social media much more heavily than do their older counterparts when it comes to receiving pizza information. In fact, nearly one-third of Millennials said that they use online advertising, social media and online ratings to gain pizza information versus less than 20% for those 35 or over.
- Pizza lovers like to enjoy their pizza with . . . a soft drink! That's right: 78% of pizza lovers order a soft drink with their pizza. Only 30% order an alcoholic beverage. However, having an alcoholic beverage with pizza was higher among Millennials than among the other generations.



**86%** of pizza lovers have recommended their favorite pizza to their friends and family, so testimonials are powerful.



## Suggested Actions to Take

### For Restaurants That Serve Pizza:

1. Americans love their pizza with a soft drink. Be sure to offer a pizza and soft drink combination. However, more Millennials than other generations like pizza with an alcoholic beverage, so if you cater to Millennials, consider recommending an alcoholic beverage with different topping combinations.
2. Encourage restaurant customers to post pictures of themselves with their pizza while at your restaurant. The secret: offer to take the picture for them using their own camera phone or offer them a discount if they post while they're at the restaurant!
3. Create a short hashtag for your restaurant and place signage at tables and on the wall asking customers to post their favorite pizza picture, comment or funny quote and tag you for a chance to win prizes or recognition.

### For Retailers That Offer Frozen Pizza:

1. Make sure to carry pizzas with natural ingredients and offer tasty gluten-free options that are clearly labeled and prominently displayed.
2. Offer a loyalty program that provides insights, access and specials that the consumer might not otherwise be able to receive. We see that a combination of savings offers, behind-the-scenes photos and cutting-edge info create the most engagement and brand connection.
3. When marketing your pizza options, keep in mind that a female who exercises at least twice per week is the one most likely to be a pizza lover! This might mean marketing lower calorie or healthier options.

# About the Authors



## Smart Flour Foods

At Smart Flour Foods, we believe that everyone should love what they eat, and our passion is creating great tasting gluten-free foods through the power of Ancient Grains. All of our products are made from Smart Flour®, a proprietary blend of the ancient grains sorghum, amaranth, and teff. These powerful whole grains, unchanged through the millennia and naturally gluten free, offer taste, texture and nutrition that often exceeds conventional wheat based products. Using Smart Flour, we create award-winning frozen pizzas and crusts that are sold at grocery stores around the country including Whole Foods Markets and Sprouts. Smart Flour Foods is now the fastest growing brand in the pizza set of the natural grocery channel (SPINs 5/17/15). Our pizza crusts and other foodservice products are also available at restaurants nationwide, including popular chains like Mellow Mushroom, Giordano's, Pie Five, Austin's Pizza, Hideaway Pizza, Mary's Pizza Shack, and The Original Pancake House.

For more information about us, visit our website at [www.smartflourfoods.com](http://www.smartflourfoods.com) or find us on Facebook and Twitter @smartflourfoods.



## The Center for Generational Kinetics

The Center for Generational Kinetics is the leader in Millennial generation research and strategy. The Center's experienced team works with brands and employers across the globe. We lead original research that uncovers emerging generational trends. We transform our findings into measurable solutions that grow sales, increase engagement and drive market share. Our goal is to make every generation more valuable to you.

The Center's strength is our deep cross-industry expertise in solving the Millennial challenge. Our clients range from Mercedes-Benz and Four Seasons Hotels to major insurance, banking and global retail brands. The Center's team has been featured on *60 Minutes*, *20/20*, *The Early Show*, and the *The Today Show* along with the *New York Times*, the *Wall Street Journal* and hundreds more.

Contact our friendly office to see how we can lead research or strategy to solve your generational challenge: [www.GenHQ.com](http://www.GenHQ.com) or +1 (512) 259-6877



# Research Methodology

This research was conducted in April 2015 to better understand the attitudes, behaviors and preferences of the US pizza lover. An online survey was administered to 3,288 US consumers who were representative of the US Census with regard to gender, age, region and household income. Of the 3,288 who responded to the survey, 2,906 live in a household that eats pizza at least once a month (pizza consumer). 1,004 (or 35%) of these pizza consumers go out to a restaurant for pizza and also buy frozen pizza from the store . . . these 1,004 “pizza lovers” went on to complete the 10-minute online survey. The margin of error for the study is +/- 3% 95 out of 100 times.

# PIZZA LOVERS IN AMERICA 2015

## Unexpected Findings From a Generational Look At Pizza Trends

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