

PIZZA LOVERS IN AMERICA 2015

Executive Summary



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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!

Why We Led This Research

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

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 more 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 as well as every other generation.

Three of the Many Findings From The National Survey

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?

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

- A jaw dropping 63% of pizza lovers in the U.S. are women! With 41% of those being Millennials and 59% are 35 or older.

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

- 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!

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 brings smiles and 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 America go to make sure they are able to have their pizza and eat it too?

- 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 totally acceptable to eat pizza for breakfast and dinner on the same day. We wonder if it's the same pizza both times...

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 impacts 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 head 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 only because of a gluten allergy. Whereas 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.

For ALL of the findings from the study—including the unexpected insights into natural ingredients and preferred customer experience—plus the 6 Take Action Strategies, contact Smart Flour Foods for the complete white paper:

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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 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 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.

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