

# PIZZA AND ITALIAN RESTAURANTS – GERMANY – 2023

Amid squeezed incomes and higher menu prices, prove value by highlighting hard-to-replicate attributes whilst balancing local and Italian ingredients.



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# Pizza And Italian Restaurants – Germany – 2023

## This report looks at the following areas:

- Participation in pizza and Italian restaurants, with takeaway ordering being the most prevalent
- Frequency of eating in/ordering takeaway from pizza/Italian restaurants, with almost all 16–34s visiting/ordering from pizza/Italian restaurants, and doing so most often
- Chain and independent pizza/Italian restaurant usage, with chains having a slight lead over independents, driven by 16–34s
- Motivating factors to choose a pizza/Italian restaurant over another, with proximity in pole position
- Behaviours related to pizza/Italian restaurants, with Germans showing great interest in reusable pizza/containers
- Attitudes towards pizza/Italian restaurants, with Italian but also local provenance resonating with quality-seeking Germans



Amid squeezed incomes and higher menu prices, prove value by highlighting hard-to-replicate attributes whilst balancing local and Italian ingredients.

## Overview

**64% of Germans who eat in/order from pizza/Italian restaurants do so at least once a month**, driven by a combination of accessibility, convenience and emotionality. This rises to **82% for 16–34s, the core users**. Sustaining their engagement is key to counterbalance a growing and less engaged, older cohort.

To address the more significant health and environmental concerns of 16–34s, operators can **invest in flavour enhancement of plant-based dishes** and **leverage PB/BFY swaps** and

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**portion control.** Strengthening brand connection through **app-based loyalty programs** and **aligning with their interests/pastimes** (eg gaming, TikTok) will also resonate.

With **takeaway favoured over eating in**, making ordering **easier and more immersive** (eg with AI, AR/VR) and **expanding access** (eg via third-party apps, vending machines) will pay off. Yet there is **scope to improve the sensory experience** via at-home finishing tips and pizza baking kits.

Rising energy and food costs have led to price hikes at pizza/Italian restaurants, and **55% of users** have noticed. To justify higher prices, **operators can convey added value** by **emphasising hard-to-replicate cooking methods** (eg baked at 485 °C), **rare ingredients**, as well as **Italian and local provenance**.

As some shift to supermarket meals, **restaurant-branded premium retail ranges** can capture those willing to trade up while trading down.

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# Report Content

### Key issues covered in this Report

- Overview

## EXECUTIVE SUMMARY

- The five year outlook for pizza and Italian restaurants

### Market context

- Pizza/Italian restaurants are ingrained in Germans' eating out/takeaway ordering habits...
- ...helping cushion sales amid cutbacks and trading down
- A return to 19% VAT rate for eat-in meals would see pizza/Italian restaurants' on-premise sales drop, but off-premise rise
- Plant-based/sustainable packaging innovation will push pizza/Italian restaurants' competitiveness in the long term
- Growing health awareness will lead to better pizza and increased customisation
  - Graph 1: consumers who have reduced the amount of pizza they eat due to health concerns, by age, 2023

### Opportunities

- Deliver added value by highlighting hard-to-replicate pizza attributes
- Balance Italian with local provenance for a quality and transparency boost
  - Graph 2: attitudes towards pizza/Italian restaurants, 2023
- Leverage rare ingredients to encourage trading up...
- ...while trading down
- Increase the permissibility of pizza/Italian dishes via customisation and portion control
- Capitalise on the emotional benefits pizza/Italian restaurants fulfill

## MARKET DRIVERS

### The German economy

- Stagnation follows a technical recession
  - Graph 3: key economic data, in real terms, 2019-24
- Inflation slows down – but remains at a higher level
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and consumer expenditure
  - Graph 4: financial confidence index, 2022-23

### The impact of the economy on pizza and Italian restaurants

- Pizza and Italian restaurants' popularity...

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- Pizza and Italian restaurants' popularity...
- ...can go some way towards shielding them from the cost of living crisis...
- ...but higher prices will push some Germans to cut back and/or trade down on pizza/Italian restaurants
  - Graph 5: wholesale price index of flour and cereal products, 2021-23
- A return to 19% VAT rate threatens foodservice, but pizza/Italian restaurants should be less impacted
- More discerning spending calls for enhanced value and transparency from pizza/Italian restaurants
  - Graph 6: current financial situation, 2023
- Retail, a rising threat... and opportunity

## Sustainability

- Climate change and sustainability push will see the cost of basic pizza/Italian food ingredients increase...
- ...leading to a less-but-better approach to pizza/Italian restaurants
- Pizza/Italian operators will need to lead the way towards a low-waste...
- ...and plant-based (PB) future
- Plant-based innovation will help pizza/Italian restaurants remain competitive in the long term

## Healthy eating

- Growing health focus among 16-34s might dampen pizza consumption frequency...
- Growing health focus among 16-34s might dampen pizza consumption frequency...
- ...but a better-pizza approach and customisation options will help cushion the blow

## Population dynamics

- An ageing population may lead to a drop in value sales at pizza/Italian restaurants in the longer term

## Competitive landscape

- Domino's comfortably leads the segment in number of stores
  - Graph 7: select pizza/Italian restaurant brands, by number of stores, 2023
- Domino's increases promotional and marketing activities amid slowing delivery demand
- L'Osteria, an example of a successful eat-in and takeaway strategy
- McWin continues to grow its share of the pizza/Italian restaurant market in Germany and Europe
- Competition is expected to continue intensifying from...

## WHAT CONSUMERS WANT AND WHY

### Participation in pizza and Italian restaurants

- Seven in 10 Germans frequent pizza/Italian restaurants
- 16-34 year olds are the core users of pizza/Italian restaurants
  - Graph 8: participation at pizza/Italian restaurants in the last 12 months, by age, 2023
- Pizza/Italian restaurants' convenience and social focus boost their appeal among 16-34s
- Takeaway is in focus as the preferred channel to enjoy pizza/Italian restaurants

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- Graph 9: takeaway participation at pizza/Italian restaurants in the last 12 months, 2023
- Enhance the pizza/Italian takeaway sensory experience
- Leverage Germans' love for scratch cooking for a fresher, DIY at-home experience
- Improve access across channels and locations with alternative pizza/Italian restaurant concepts...
- ...and by embracing tech advancements
- Use direct ordering to cement the link with pizza/Italian restaurant users
  - Graph 10: takeaway ordering methods for collection/delivery from a pizza/Italian restaurant in the last 12 months, 2023
- Utilise emerging technologies to boost direct pizza/Italian food ordering
- Domino's Pizza AR Pizza Chef ordering
- However, third-party ordering's appeal to 16-34s might make it worth the price
  - Graph 11: takeaway ordering methods for collection/delivery from a pizza/Italian restaurant in the last 12 months, by age, 2023

### Frequency of eating in/ordering takeaway from pizza/Italian restaurants

- A majority of pizza/Italian restaurant users frequent them at least on a monthly basis
- Operators will need to support those most at risk...
  - Graph 12: frequency of eating in/ordering a takeaway from pizza/Italian restaurants in the last 12 months, by financial situation, 2023
- ...with entry-level offers that deliver value for money
- Older Germans' moderate participation is counter-balanced by younger Germans' enthusiasm
  - Graph 13: frequency of eating in/ordering a takeaway from pizza/Italian restaurants in the last 12 months, by age, 2023
- As loyalty programs gain relevance for pizza/Italian restaurants...
- ...look to app-based programs to engage and reward younger Germans' loyalty
- Appeal to interests and pastimes to foster engagement
- Deal pursuit and merchandising can be a way to foster loyalty and brand connection
- Plant-based (PB)/vegan options key to future-proof engagement
- Plant-based (PB)/vegan options key to future-proof engagement
- Make plant-based as satisfying as regular options
- Pack plant-based/vegan dishes with flavour

### Chain and independent pizza/Italian restaurant usage

- Driven by younger Germans, pizza/Italian restaurant chains have a slight lead over independents
  - Graph 14: pizza/Italian restaurants eaten in/ordered takeaway from in the last 12 months, by age, 2023
- Aside from Domino's predominance, pizza/Italian restaurant participation is fragmented
  - Graph 15: pizza/Italian restaurants eaten in/ordered takeaway from in the last 12 months, 2023
- Build brand trust via collaborations with local restaurants
- Independent pizza/Italian restaurants can boost their popularity via influencer marketing
- Independent pizza/Italian restaurants can boost their popularity via influencer marketing

### Motivating factors to choose a pizza/Italian restaurant over another

- Pizza/Italian restaurant users are most likely to be encouraged to visit/order from a location near them
  - Graph 16: [no title]
- Quality at competitive prices is key to encourage consumers to look beyond what is closest
- Boost value perceptions with hard-to-replicate pizza/Italian dishes
- Give restaurant pasta dishes a boost with a focus on slow drying time and handmade
- Make high baking temperatures a USP for restaurant pizza
- Incorporate escapism into your marketing
- L'Osteria promotes an Italy 'holiday' from €9.75
- Align the comfort pizza/Italian restaurants bring with self-care
- Place an emphasis on how pizza/Italian food brings people together with group bundles/shareables
- Combining convenience, value and quality with personalisation can attract up to nine in 10 consumers
- Grow occasions with more permissible pizza/Italian dishes
  - Graph 17: healthy options as a motivating factor to choose a pizza/Italian restaurant over another, by frequency of eating in/ordering a takeaway from a pizza/Italian restaurant in the last 12 months, 2023
- Show how pizza can be a lighter, balanced meal

### Behaviours towards pizza/Italian restaurants

- Germans are eager for innovation in the pizza/Italian restaurant space
  - Graph 18: behaviours towards pizza/Italian restaurants, 2023
- There is widespread interest in reusables, but comfort will come first
- Communicate and educate to improve recycling
- Trash Busters take on pizza box recycling
- Embrace sustainable packaging innovation
- Add value to reusables to encourage uptake
- Tradition and authenticity resonate as Germans want more regional pizzas
- Boost the profile of regional pizza/flatbread varieties by blending authenticity and nostalgia
- Create opportunities to trade up with rare ingredients...
- Create opportunities to trade up with rare ingredients...
- ...and trading up suggestions
- Tap into the lipstick effect...
- ...with premium restaurant-branded pizza/Italian dishes
- Use gourmet ingredients to elevate supermarket ranges

### Attitudes towards pizza/Italian restaurants

- Italian but also local provenance will resonate with quality-seeking Germans
  - Graph 19: attitudes towards pizza/Italian restaurants, 2023
- Italian provenance intrinsically linked with quality, but more transparency is needed

- Italian provenance intrinsically linked with quality, but more transparency is needed
- Embrace localism by highlighting local, quality ingredients
- Convey value by balancing Italian and local ingredients
- Opportunities for premiumisation with high-quality, on-site dining...
- ...that delivers an experience beyond the food

### LAUNCH ACTIVITY AND INNOVATION

- Domino's uses world cuisine toppings and flavours to generate excitement
- Call a Pizza embraces the power of cheese
- New York pizza leverages crust customisation to offer both indulgent and BFY options
- The snackification trend is in full steam with smaller pizza servings...
- ...and easy-to-eat, portable pizza formats
- Pizza Hut uses a renewed focus on sides to pair them with snacking pizza
- Domino's offers value for money (and choice) over low prices
- Esports is a rising partnership and collaboration opportunity
- Pizza/Italian restaurant chains recognised by ProVeg as plant-based/vegan options are growing
- L'Osteria launches loyalty program app to deliver personalised value and convenience

### Advertising and marketing activity

- Twitch influencers launch virtual pizza chain Happy Slice
- L'Osteria taps into tradition with Nonna's seal of approval
- Domino's new Chicken Döner Pizza
- 60 Seconds to Napoli promotes pizza tradition and authenticity

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- TURF methodology
- A note on language



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