

VARIETY IS KEY IN PIZZA TRENDS

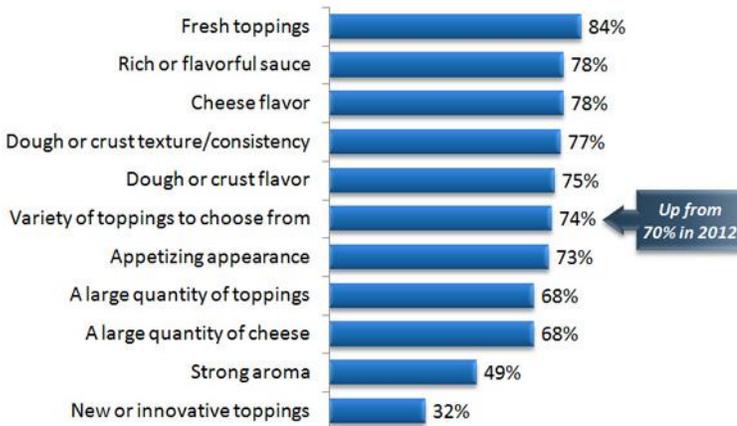
October 2014

Top Pizza Varieties (% of U.S. restaurants featuring)

	ALL	SEGMENT			
		QSR	Midscale	Casual	Fine Dine
Vegetarian	78.7%	81.9%	79.0%	69.0%	0.0%
Cheese	77.5%	76.4%	90.5%	69.0%	100.0%
Hawaiian	53.3%	57.5%	56.2%	37.9%	0.0%
Bbq Chicken	52.4%	54.7%	51.4%	46.6%	0.0%
Meat Lover	46.7%	48.9%	45.7%	41.4%	0.0%
Pepperoni	40.7%	41.9%	41.9%	35.3%	100.0%
Meatball	38.8%	35.8%	48.6%	39.7%	0.0%
Supreme	32.0%	35.3%	32.4%	21.6%	0.0%
Greek	31.6%	32.8%	35.2%	25.0%	0.0%
Buffalo Chicken	31.6%	34.7%	29.5%	24.1%	0.0%
White Pizza	29.0%	28.6%	28.6%	31.0%	0.0%
Margherita	27.1%	19.2%	30.5%	48.3%	100.0%
Mexican	26.6%	31.1%	22.9%	16.4%	0.0%
Sausage	20.8%	17.8%	25.7%	25.0%	100.0%

Base: 582 qualifying U.S. Chain and Independent Restaurants
Source: Datassential, 2014.

74% of consumers say a wide variety of topping options is important for creating a good pizza.



Base: Approximately 1100 consumers aged 18+ indicated their opinion on a scale from 1-6 where 1 = disagree completely and 6 = agree completely.
Source: Technomic, Inc. The Pizza Consumer Trend Report (2014)

Red Arrow
Natural flavor, pure and simple.

Themed Pizzas Continue to Grow

Vegetarian: Roasted, Braised and Charred: From roasted beets to braised endive to charred corn or broccoli, “**value added**” vegetables we thought we’d never see atop a pizza are now the crowning jewels. *Getflavor.com*.

Hawaiian: Hawaiian pizza is gaining traction because of the growing Hispanic community and customers don’t have to decide what topping to add. “This is something that can be picked up and leveraged as an opportunity to sell more pizza,” Darren Tristano, VP of Technomic said.

Buffalo Chicken: “The Buffalo chicken pizza is popular because it has the protein—chicken—but also the Buffalo sauce that’s going to give it some spiciness, which customers love,” noted Darren Tristano, VP of Technomic.

Chicken is the No. 1 trend. Incorporating menu items that are Italian and made with chicken will give consumers what they want the most. And that’s when you’ll see revenues increase,” says Vincent Todaro, Todorini Foods.

“Buffalo Chicken Pizza” has increased 22.8% on menus from 2010-2014.



Consumer
Trends

34%
of diners are willing to **pay more** for gourmet ingredients, compared to 26% in 2010.

Grilling pizza is catching on in a big way. Avid grillers are familiar with the **smokiness**, crunchiness, and overall drool factor of a pizza made on a gas or a charcoal grill.

Age impacts topping preferences.

Those 18-24 vs average age prefer:

Bacon-topped pizza	40% vs 31%
Extra cheese	54% vs 45%
Ham	36% vs 29%
Pineapple	26% vs 21%