

Using Audience Analysis to Understand the Delivery Pizza Preferences of Gamers

August 2015

A high-level analysis of the top delivery pizza chains, how they resonate with different audience segments including parents and gamers, and what gamers in particular dislike and like about each chain.

What you'll get out of this report

This report provides a high level analysis the top delivery pizza chains, how they resonate with different audience segments including parents and gamers, and what gamers in particular dislike and like about each chain.

The sheer number of people talking about eating pizza is staggering. It is by far one of the most popular foods among American consumers. In fact, people discuss eating pizza **four times** more than tacos and burgers, and **six times** more than BBQ.

Using search data to understand brand mind share at the moment of intent, and social data to gain deeper context on what motivates consumers in their choice of brands, this report will provide an overview of the top three delivery brands.

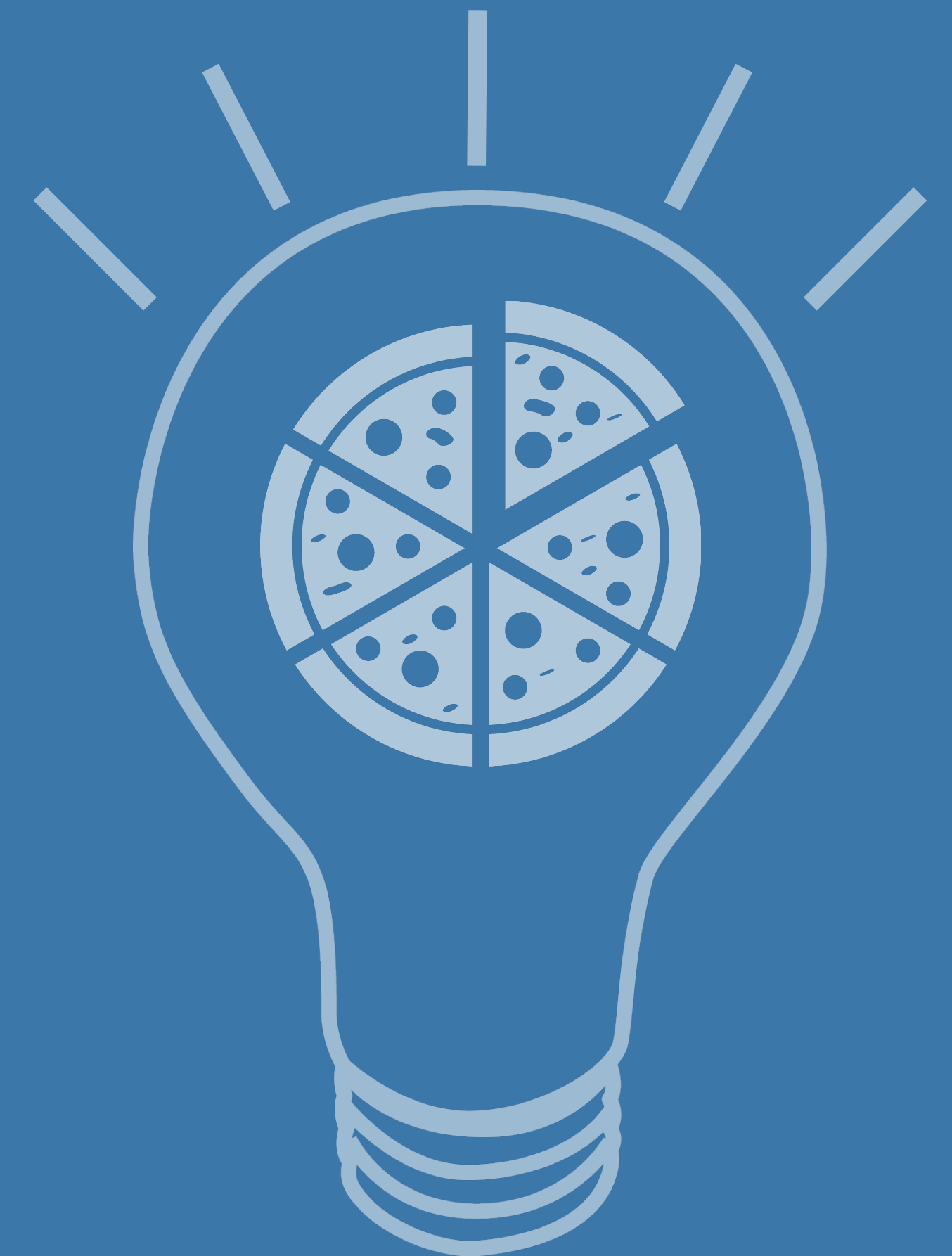
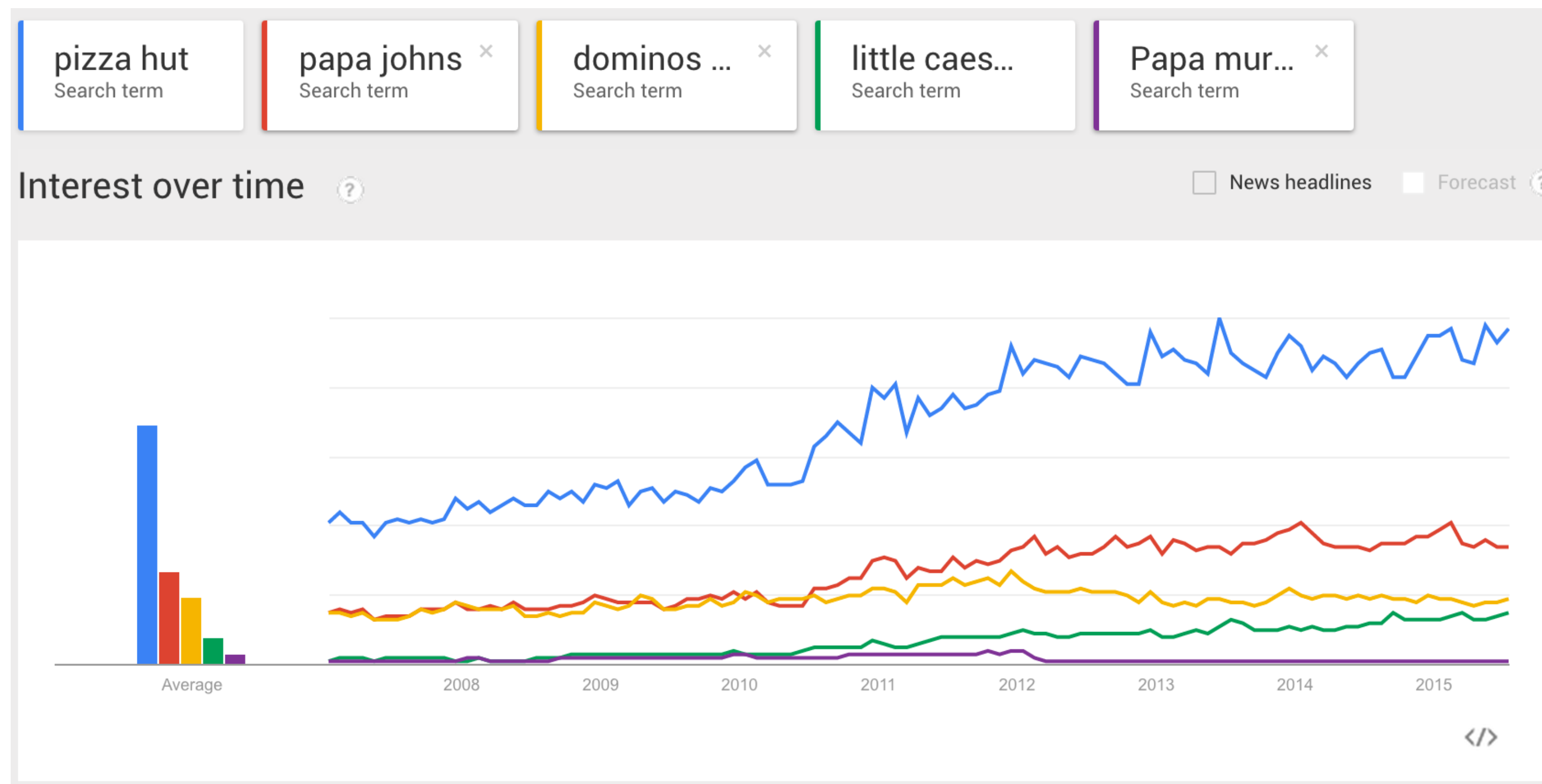


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Delivery Pizza Search Trends

Every search entered into Google provides valuable insight into consumer behavior and intent. Viewed in aggregate, this search data becomes a powerful tool for trend identification and analysis.



Analysis

When it comes to search, Pizza Hut is winning the mind share war by a large margin. In terms of trend trajectories, Pizza Hut is also the only brand that has enjoyed steady growth in search.

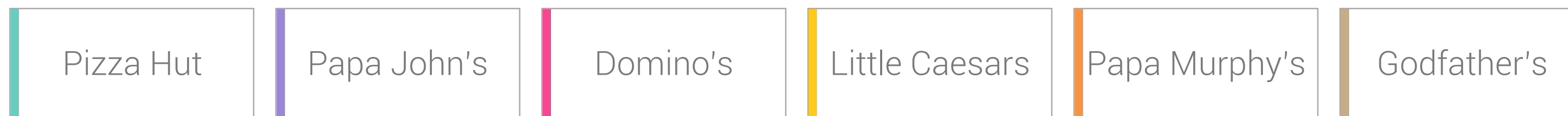
The bottom four of the top five brands are in a somewhat close but changing race, with Papa John's breaking away from the pack but then stagnating, Domino's Pizza declining, and Little Caesars experiencing recent growth.

How does search compare with social?

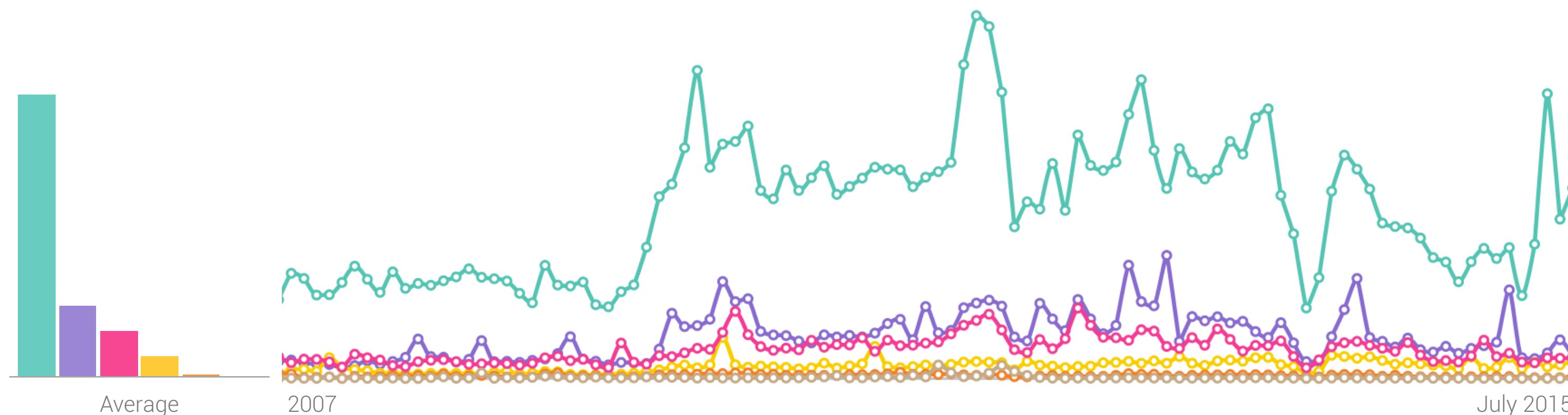
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Delivery Pizza Social Trends

Going hand-in-hand with search data, social media data likewise provides a powerful method for identifying trends and measuring brand mind share.



Social media interest over time



Analysis

The overall standing for each brand on social media mirrors that of search.

When it comes to delivery pizza, consumers not only search for Pizza Hut far more often, they also talk about the brand to a greater degree.

However, one key difference between what people search for and what they say was a narrower gap between Papa John's and Domino's.

What can social analysis tell us about why?

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General Perceptions of Pizza Brands

Based on the general consensus of the social media universe, Pizza Hut wins on overall favorability, positive passion, cost positivity, overall perceptions of taste, and share of voice.

	Winner	Pizza Hut	Papa John's	Dominos	Little Caesars
Mentions		27,325,045	6,923,276	6,530,147	2,432,493
Favorability		71%	65%	66%	60%
Positive Passion		High	Medium	High	Medium
Negative Passion		Medium	Low	Medium	Very Low
Quality of Delivery		77%	58%	63%	N/A
Ordering Overall		60%	63%	61%	60%
Cost (Positivity)		86%	74%	73%	75%
Taste		82%	80%	82%	78%

January 2013 - July 2015

Analysis

For the general population, the only areas where Pizza Hut isn't beating its competition is the ordering experience and higher degrees of negative language used when expressing unfavorable opinions about the brand.

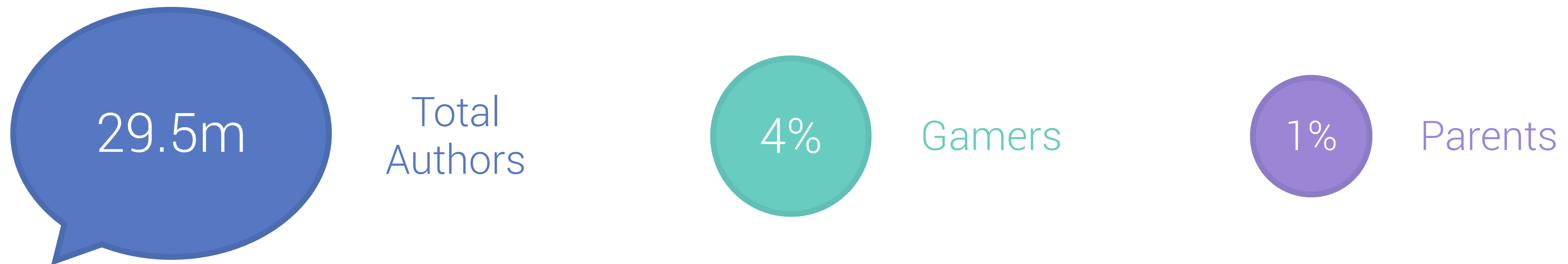
Beyond the general population, how do each of these brands perform with specific sub-groups?

Comparing Audiences: Gamers vs Parents

What specific consumer groups talk about pizza and how can pizza brands reach these interested parties in ways that resonate with them?

The answers to these questions can be found by segmenting social media authors into distinct audiences based on expressed interests and associations, for example, coffee drinkers or fathers. When researching pizza, there were two consumer groups in particular that stood out: gamers and parents.

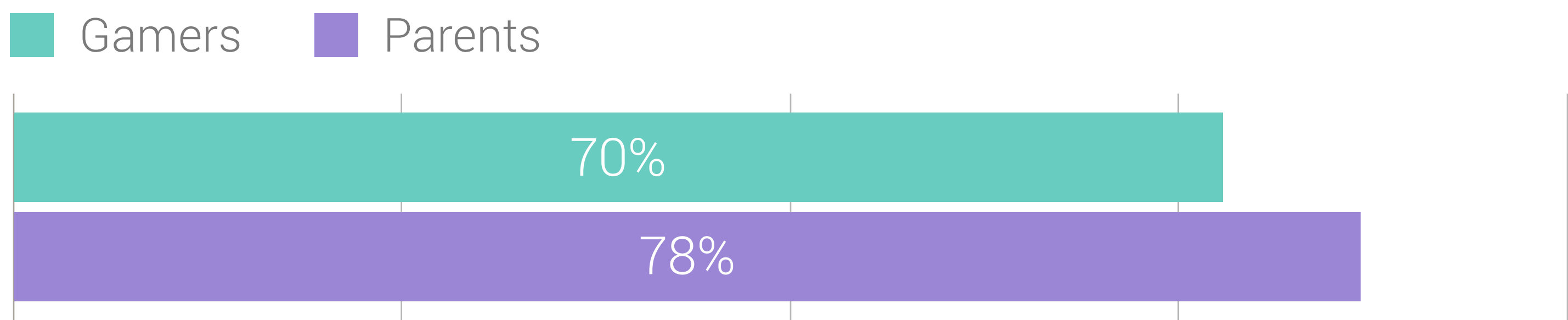
Social Media Authors Discussing Pizza 2007-2015



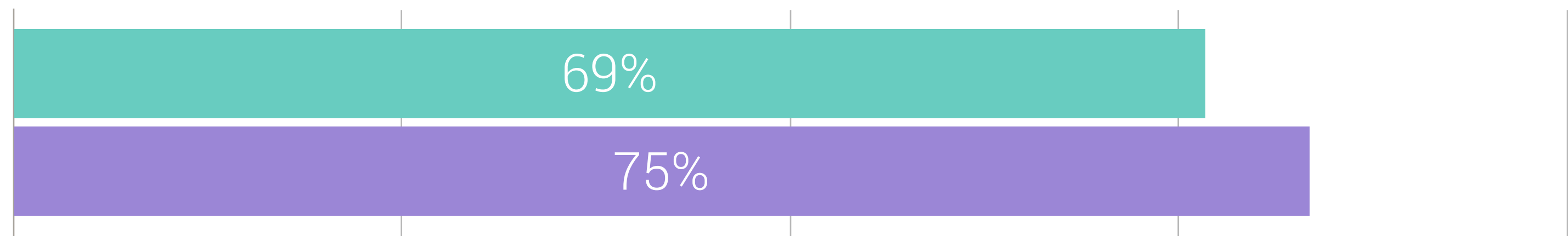
Gamers vs. Parents Audience Overview

While gamers tend to talk about pizza in much higher volumes than parents, the two groups exhibit differing opinions about delivery pizza in general as well as the process of buying delivery pizza.

Distribution of Positive Conversations About Delivery Pizza



Distribution of Positive Conversations About Buying Delivery Pizza



Insight to Opportunity

Analysis suggests that gamers are a more fickle group that are harder to please than parents.

The positive to this is that it is easier to spot friction in a group that is vocal about the shortcomings of products and services.

So, what is it that gamers specifically dislike and like about delivery pizza companies?

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Gamer Perceptions of Delivery Pizza

Pizza Hut won nearly every category with the general population, but when focused specifically on gamers, a different story emerges.

	Draw	Pizza Hut	Papa John's	Dominos	Winner	Margin
Mentions		901,581	169,526	201,018	Pizza Hut	347%
Favorability		66%	67%	66%	Papa John's	1%
Positive Passion		Low	Low	Medium	Dominos	-
Negative Passion		Very Low	Very Low	Low	Draw	-
Quality of Delivery		63%	52%	68%	Domino's	5%
Ordering Overall		68%	59%	63%	Pizza Hut	5%
Cost (Positivity)		70%	75%	69%	Papa John's	5%
Taste		77%	80%	81%	Domino's	1%

January 2013 - July 2015

Analysis

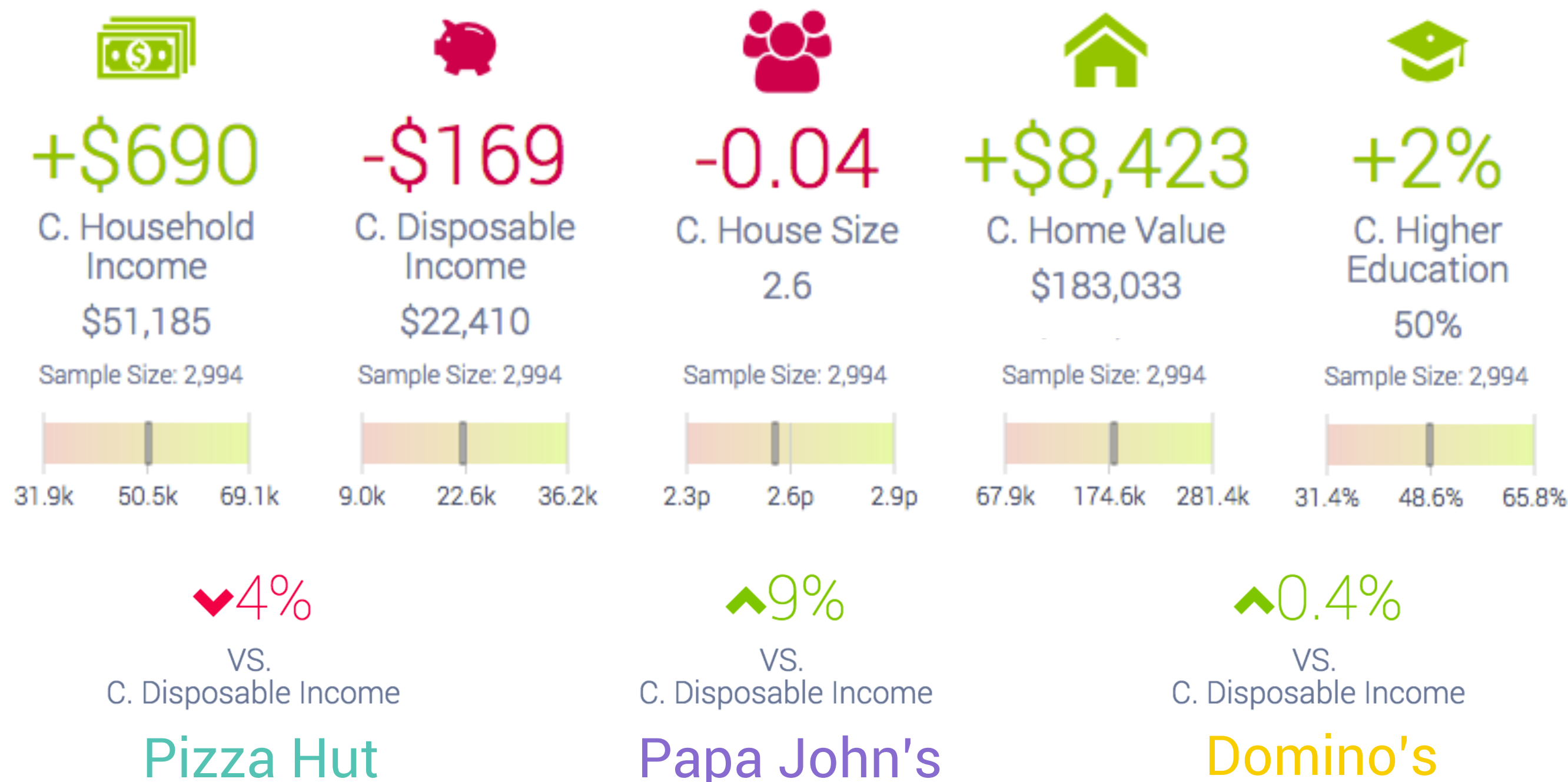
For gamers, Dominos wins on taste and quality of delivery, while Papa John's has the most positive perception for cost, and Pizza Hut provides the best ordering experience.

Compared to the general population, perceptions of cost and quality of delivery are more drastic when it comes to gamers, indicating that this group is more price and delivery sensitive.

Pizza Hut and Gamers Deep Dive

One of the steepest losses for Pizza Hut with gamers is related to perceptions of cost. When looking at U.S demographics, Pizza Hut is found to be mentioned more often by gamers with less disposable income.

U.S. Demographics Comparison

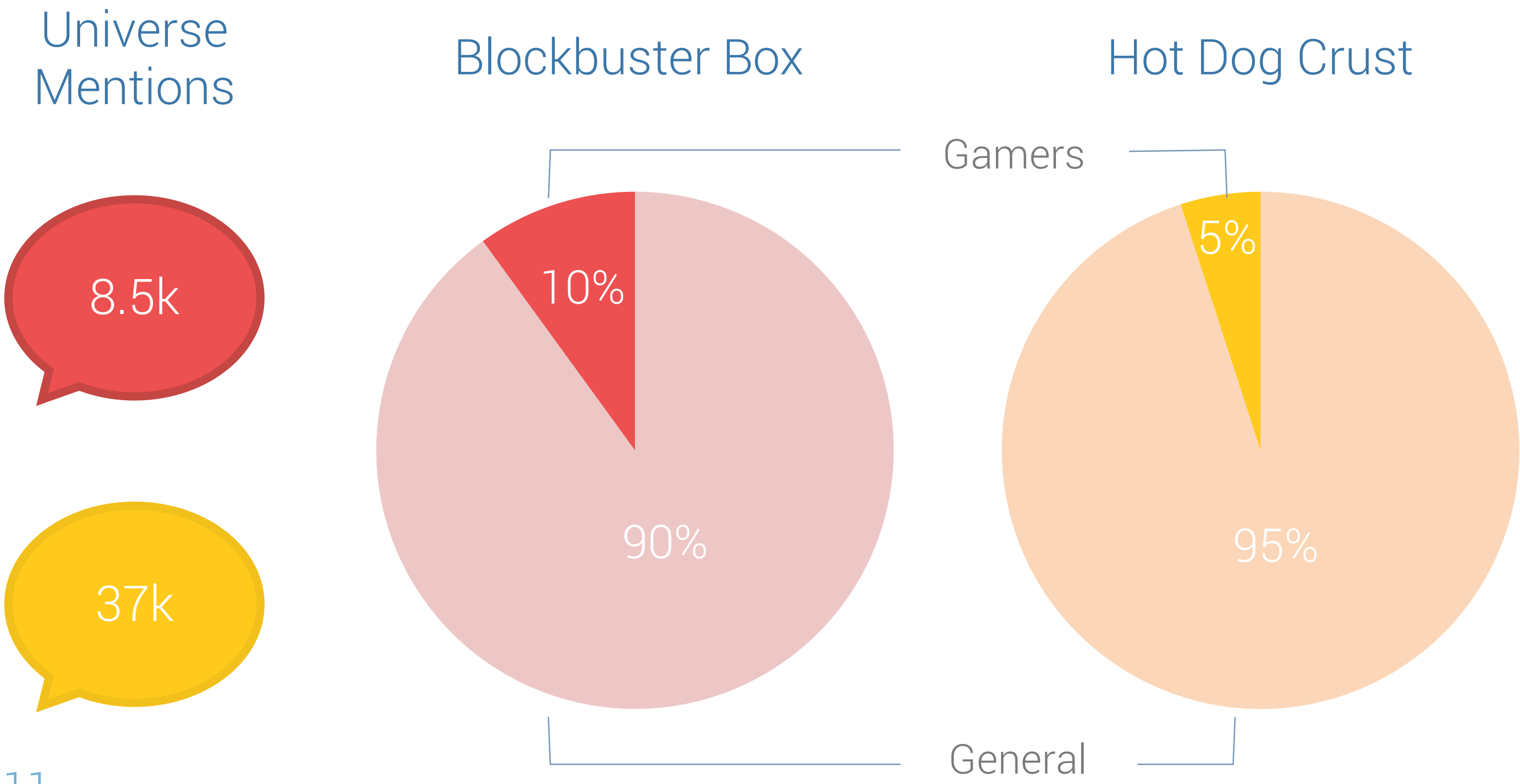


Insight to Opportunity

With Pizza Hut having a greater share of the gamer audience with less disposable income, the brand could introduce geo-targeted campaigns focused on attracting gamers in areas with less income through price-based incentives like BOGO deals, offer codes, and loyalty programs.

The Pizza Hut Marketing Machine

When compared to other brands, Pizza Hut’s marketing is unique and highly creative. The two most successful campaigns from the last year involved hot dog pizza crust and transforming pizza boxes into movie projectors.



Analysis

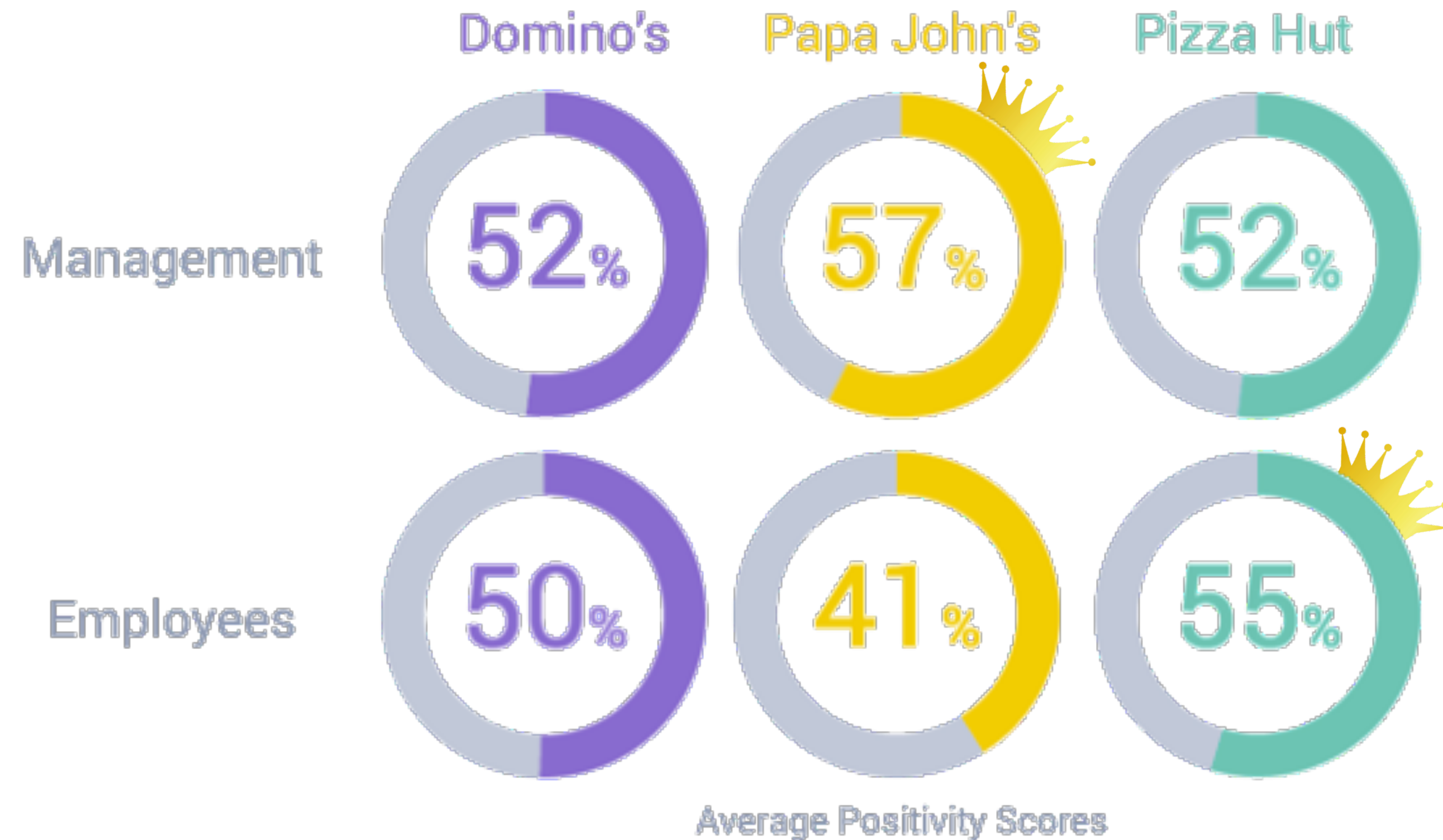
Consensus both within the general population and among gamers was that the hot dog crust was awful. Yet, in terms of generating attention and getting people talking it was the best performing campaign of any of the chains.

What was particularly interesting was that gamers represented ten percent of all the Blockbuster Box conversation.

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Papa John's and Gamers Deep Dive

Gamers are similar to the general population in terms of the negative perception for Papa John's quality of delivery and overall order experience.



Analysis

Gamers report having the most positive interactions with Papa John's managers.

Surprisingly, while interactions with management tends to be better for Papa John's than other chains, gamers have the least positive interactions with Papa John's frontline employees.

This could explain why Papa John's lags behind in both quality of delivery and the ordering experience.

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Domino's Tech-Focused Marketing

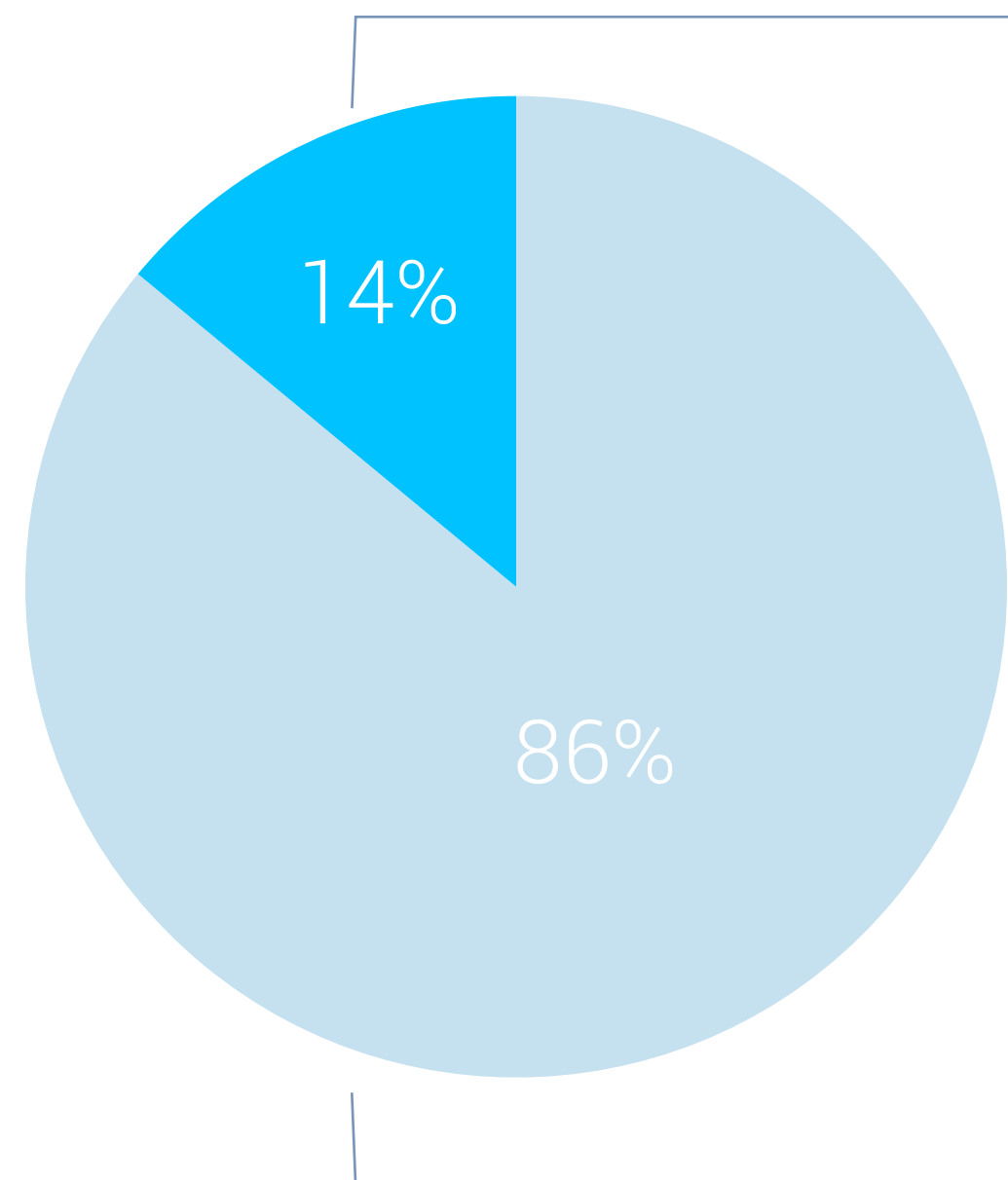
From ordering pizza on Twitter using emojis, an Apple Watch pizza tracker, and Samsung TV ordering apps, Domino's marketing has recently been incredibly tech driven.

Universe
Mentions

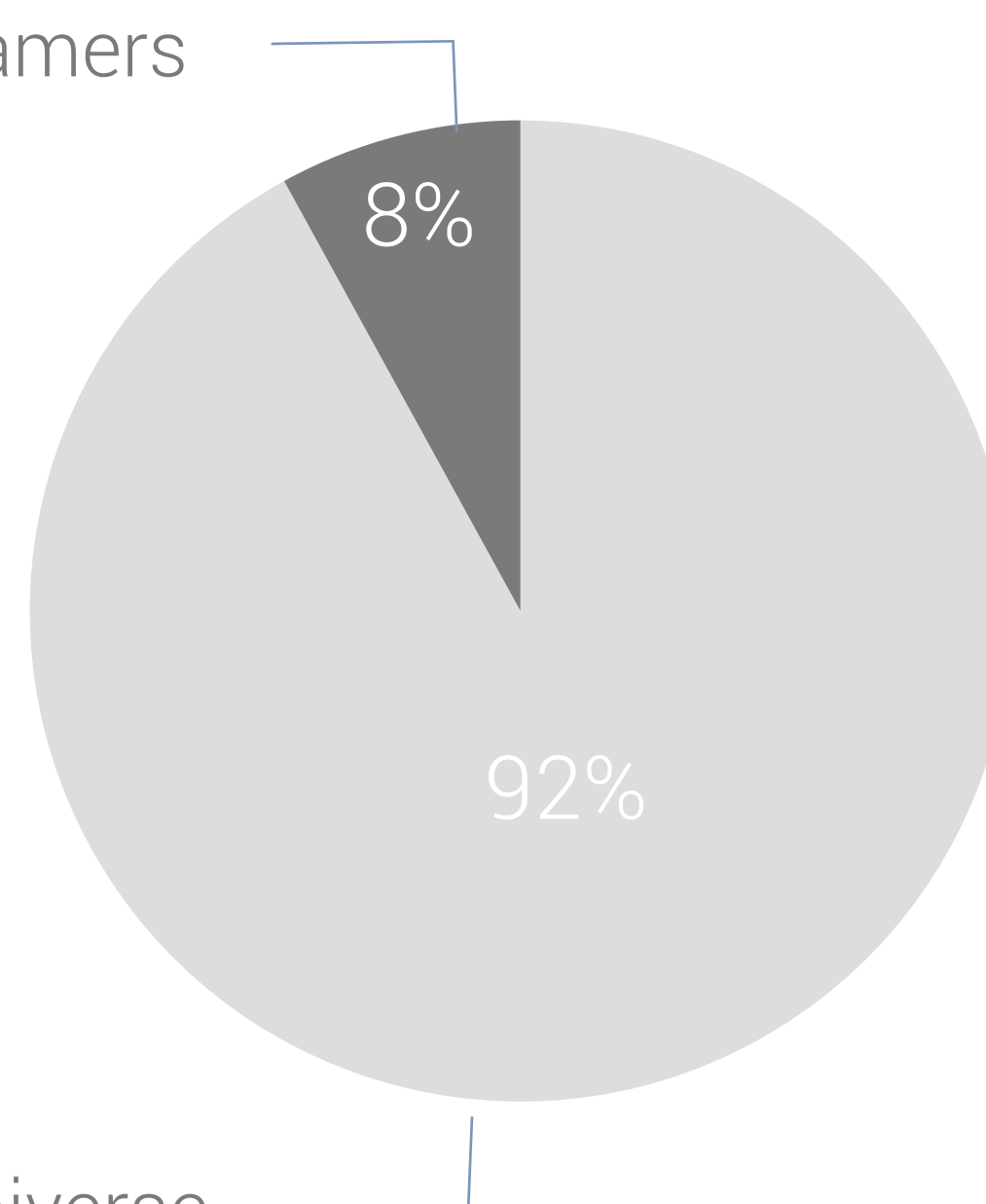


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Twitter Ordering



Apple Watch



Analysis

Domino's tech-focused marketing seemed to resonate well with gamers. Both of Domino's major efforts had a greater share of gamers talking about the campaigns than was seen for Pizza Hut's initiatives.

In comparing how gamers reacted to Domino's and Pizza Hut's marketing campaigns, there was a clear link to this group responding more often to initiatives that involve technology.

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Conclusion

While knowing what the entire social web thinks about a brand is important for establishing baselines, diving deeper and comparing what groups like gamers and parents think about a brand provides insights that are significantly more relevant and actionable.

To recap, the specific examples in this report demonstrated how narrowing online conversation data to specific audience segments can be used to:

1. Compare how the interests of subgroups differ from the general population
2. Identify how campaigns resonate with specific subgroups
3. Perform root cause analysis to understand where to improve service
4. Measure competitor marketing campaigns

Getting Results / Choosing the Best Technology

Beyond volume and sentiment, Infegy Atlas helps researchers get to the heart of what consumers think, discuss, and how they feel about topics and brands through almost instant analysis of millions of social conversations.

Results you can trust. 93% sentiment accuracy and 97% recall. Backed by the largest validation test ever published in the industry.

Flexibility. Unlimited search queries and data access going back all the way through 2007, allowing you to perform more research and pivot more quickly.

Audience segmentation. Default and customizable audience segments that enable users to perform more targeted research and deeper discovery.

Context. Deeply understand complex nuances, including emotions like trust and themes such as purchase intent, automatically.

Event Detection. Sophisticated statistical analysis of more than 125 metrics that highlights the key drivers within conversations and identifies the most important events.

Speed. Through the API or the UI, return advanced contextual analysis within seconds of hitting submit.

About Infegy

Since 2007, Infegy's cloud-based technologies have been transforming huge volumes of commentary into valuable consumer insights.

Infegy's flagship product, Infegy Atlas, helps brands, agencies, and researchers understand consumers better and faster through advanced automated analysis of online dialog.

With a focus on translating the voice of the consumer into actionable intelligence, Infegy Atlas has been utilized to determine what moms think about sugar content in breakfast cereals, what drives sales for nail polish, and if the Playstation 4 will outsell the Xbox One.

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References

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This report was created using Infegy Atlas. Infegy Atlas is a social media analytics and research platform that utilizes proprietary automated natural language processing technology and Infegy's in-house repository of online dialog dating back to 2007.

Infegy Atlas operates on a simple but powerful query language similar to what you would use for a Google search but with more operators, filters and options. These queries are available upon request.