

BREAKFAST

a  SNAP! keynote

trending breakfast dishes, preparations, and flavors

opportunities for breakfast foods beyond the morning hours

how breakfast needs shift throughout a typical week

diet or allergy concerns affecting attitudes toward breakfast

ways operators are handling rising food and labor costs

how operators purchase for their morning menus

Interest in breakfast foods and beverages are on the rise — and not just before noon. Even if it's not the most important meal of the day for every foodservice operation, breakfast is an important source of trends, from new global flavors to inventive ways for menuing familiar proteins and breads. Attitudes from operators and their guests are shifting, and breakfast is more viable than ever as an all-day offering. Consumers value convenience above all when they're considering breakfast, either at home or away from home. **Read on for breakfast data and trends to start your day off right.**

BREAKFAST: a SNAP! keynote

Topics covered

identify trending breakfast foods and beverages

- o follow emerging and maturing flavors and preparations through the Menu Adoption Cycle as they proliferate across the foodservice industry
- o see which breakfast dishes at chain restaurants have performed best with guests

expand the appeal of breakfast beyond the morning

- o find out why some consumers skip breakfast and what could pique their interest
- o learn which offerings appeal to people in the evenings or at late night and how to make those breakfast foods more available, portable, and convenient

help operators wake up to opportunities

- o experiment with new applications for familiar breakfast builds
- o gauge the demand for alternative milks and proteins, plant-based substitutes, or other options that serve people with allergy needs or special diets

right-size the supply chain for breakfast

- o find out how operators typically buy certain breakfast categories
- o help restaurants and non-commercial foodservice operations extend the mileage they get from their pantry with recipe ideas for breakfast that extend into other dayparts

From the report

● CONSUMERS

55% of consumers' last breakfast included a protein like bacon or sausage

81% of their most recent breakfast occasions occurred at home

52% of consumers agree that "breakfast is an important part of my day"

● OPERATORS

41% of U.S. restaurants serve breakfast or are open during typical morning hours

61% of operators are raising menu prices to deal with increasing food costs

26% of operators have recorded an increase in brunch sales in the past year

1,122 consumers

295 operators



report



x-tab tool



webinar

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BREAKFAST

METHODOLOGY

fielded online July 2019

1,122 consumers were surveyed overall

314 operators via the Datassential panel

- 136 restaurant operators
- 115 on-site operators
- 44 retail foodservice operators

full demographic info is available in the appendix



OBJECTIVES

- identify consumer breakfast consumption habits and preferences
- understand consumer perceptions and motivations for breakfast foods at home and away from home
- Analyze operator motivators, preferences, and challenges with menuing breakfast
- In-depth menu analysis of popular breakfast flavors, ingredients, and trends
- Identify supplier opportunities where operators and consumers have unmet breakfast needs

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Most Menued Breakfast Items

Egg

French Toast

Sandwich

Omelet

Pancakes

Fastest-Growing Breakfast Items

Avocado Toast

Fried-Chicken Sandwich

Shakshuka

Tostada

Breakfast Bowl



BUZZ Finding



Non-Alcoholic Drinks at Consumers' Last Breakfast

Brewed coffee	34%
Juice	20%
Tap water	19%
Milk	16%
Bottled water	14%
Hot tea	7%
Specialty coffee	5%
Regular soft drink	5%
Iced tea	5%
Diet soft drink	4%
Iced coffee	4%
Hot chocolate	3%
Smoothie	3%

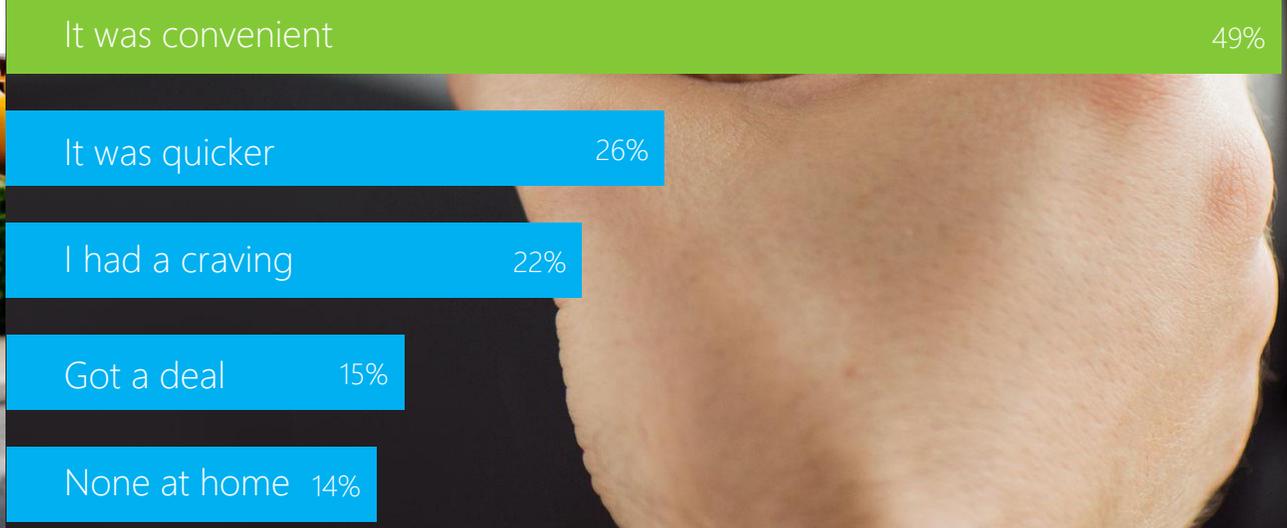
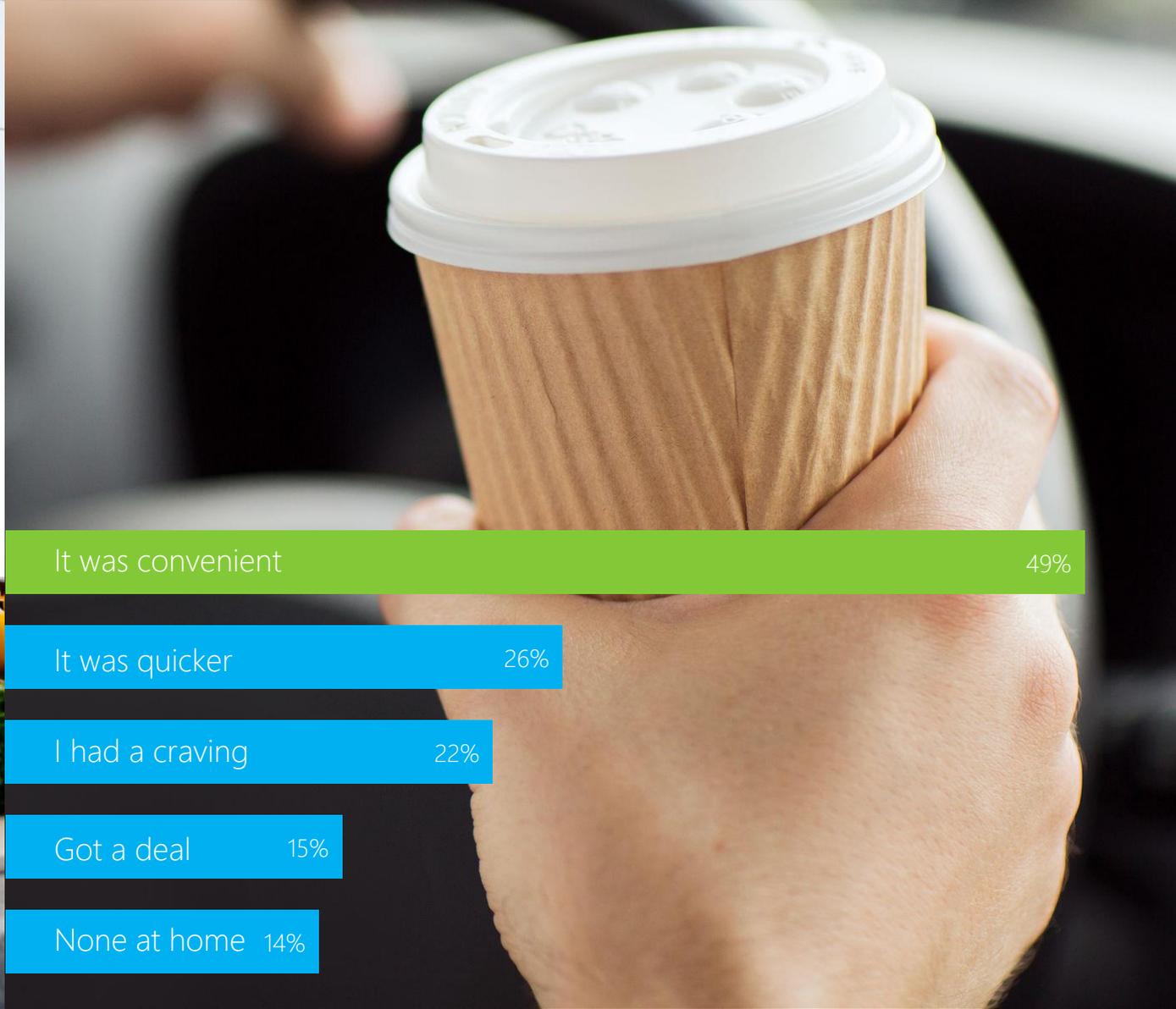
n=7,217

Q. Which of the following types of beverages did you have yesterday at breakfast? If you had more than one type of beverage, please make sure to select ALL that apply.

Why did you have your last breakfast at home?



Why did you have your last breakfast away from home?



n=875,
n=188

A6a: Why did you have breakfast at home instead of purchasing from a restaurant or other foodservice establishment?
A7b: Why did you have breakfast from a restaurant or other foodservice establishment instead of at home?



19% of consumers' last breakfast occasions occurred away from home

Quick-service restaurant	40%
Family-dining restaurant	18%
AM-focused fast-food restaurant	11%
Convenience store	7%
Fast-casual restaurant	7%
Workplace	4%
Other	3%
Supermarket prepared food	3%
Casual-dining restaurant	3%
Retail food court	1%
Fine-dining restaurant	1%
Upscale-casual restaurant	1%
Food truck / kiosk	1%

n=875,
n=1,074, n=188

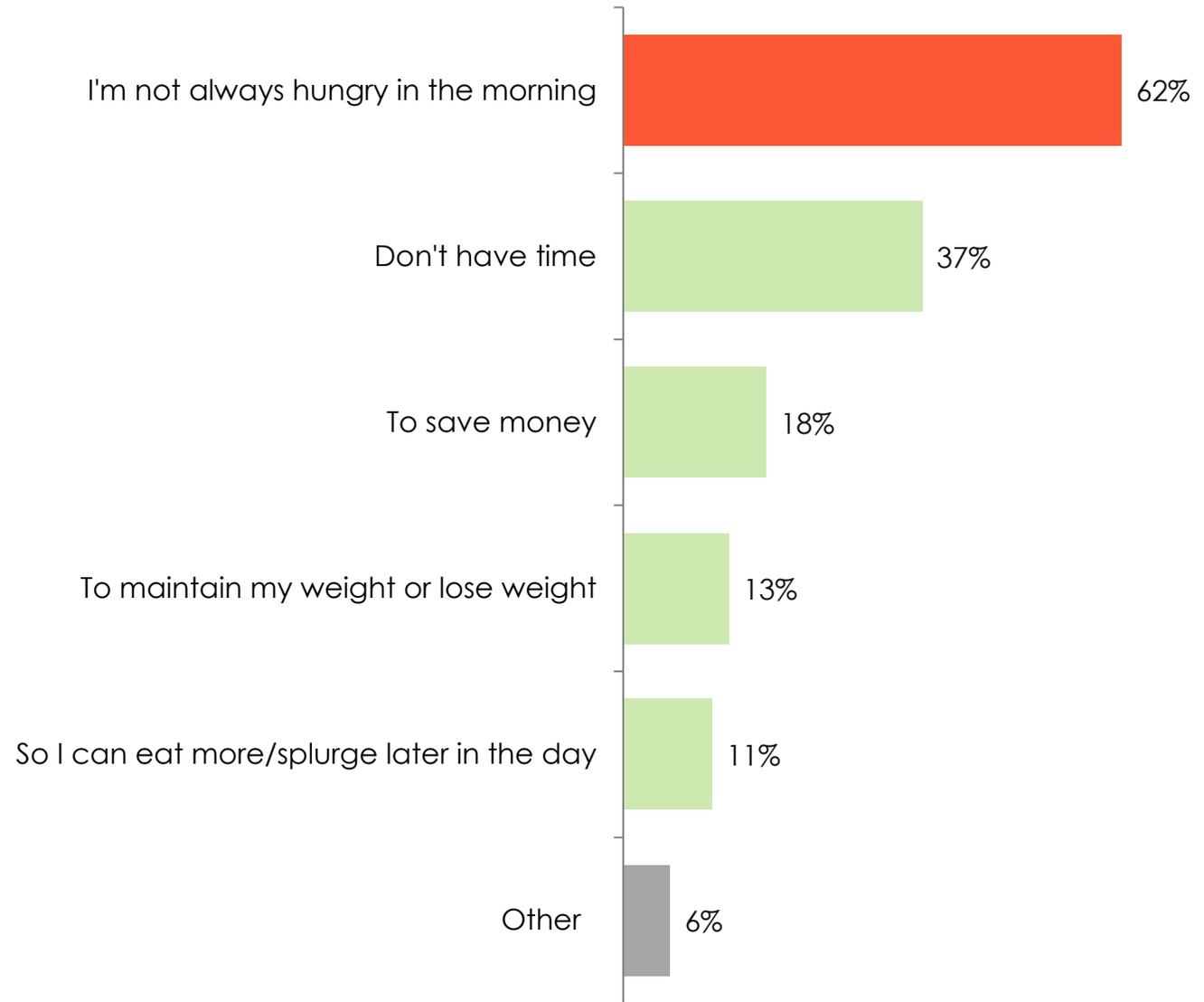
A6b: Still thinking back to this last breakfast at home: Which types of products did you eat? **A5:** Where did you get it?
A7a: For this last breakfast that you got from a restaurant or another eating establishment, where did you get it?



Breakfast skippers usually are just not hungry — offering foods that travel well or can be eaten later, especially bundled with a caffeinated beverage as a hold-over, could capture occasions that might otherwise be lost to mid-morning snacks. Saving time and money are also top factors in forgoing a morning meal.

Reasons for Skipping Breakfast

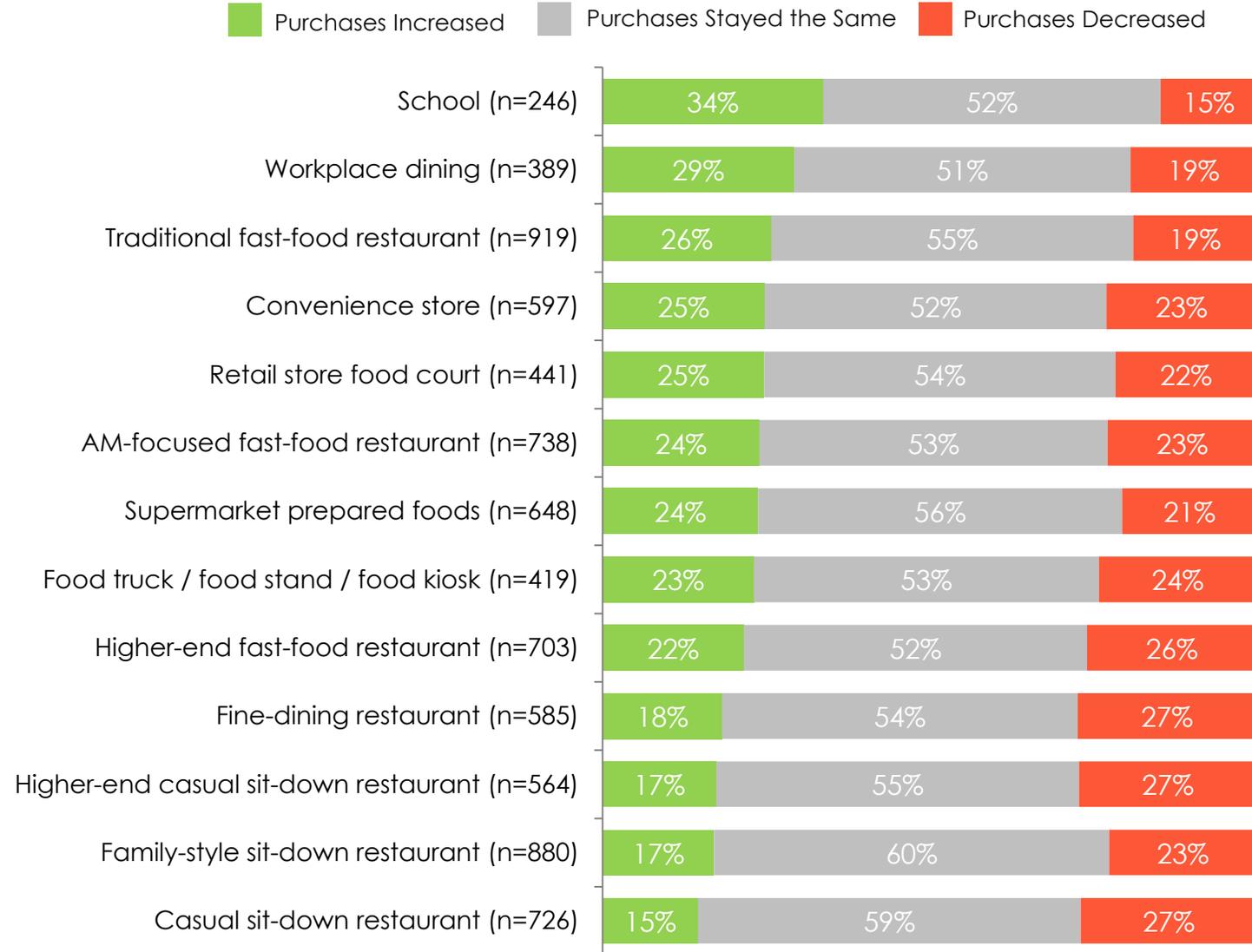
% selecting



Most consumers report visiting their regular breakfast stops with the same frequency as a year ago, though those buying their morning meals at school, work, and QSRs are more likely to have increased their purchases. Those who regularly get breakfast at full-service restaurants are more likely to have scaled back.

Change in Breakfast Purchasing in the Past Year

% selecting



During PM hours, handhelds are the best sellers for operators who offer breakfast items beyond the traditional daypart. Results are mixed for other offerings, although the high rankings of combo platters and egg entrees suggest consumer demand is strong for “breakfast for dinner” options.

Best-Selling Breakfast Items After 2 PM

% ranking 1-3

Operator Finding

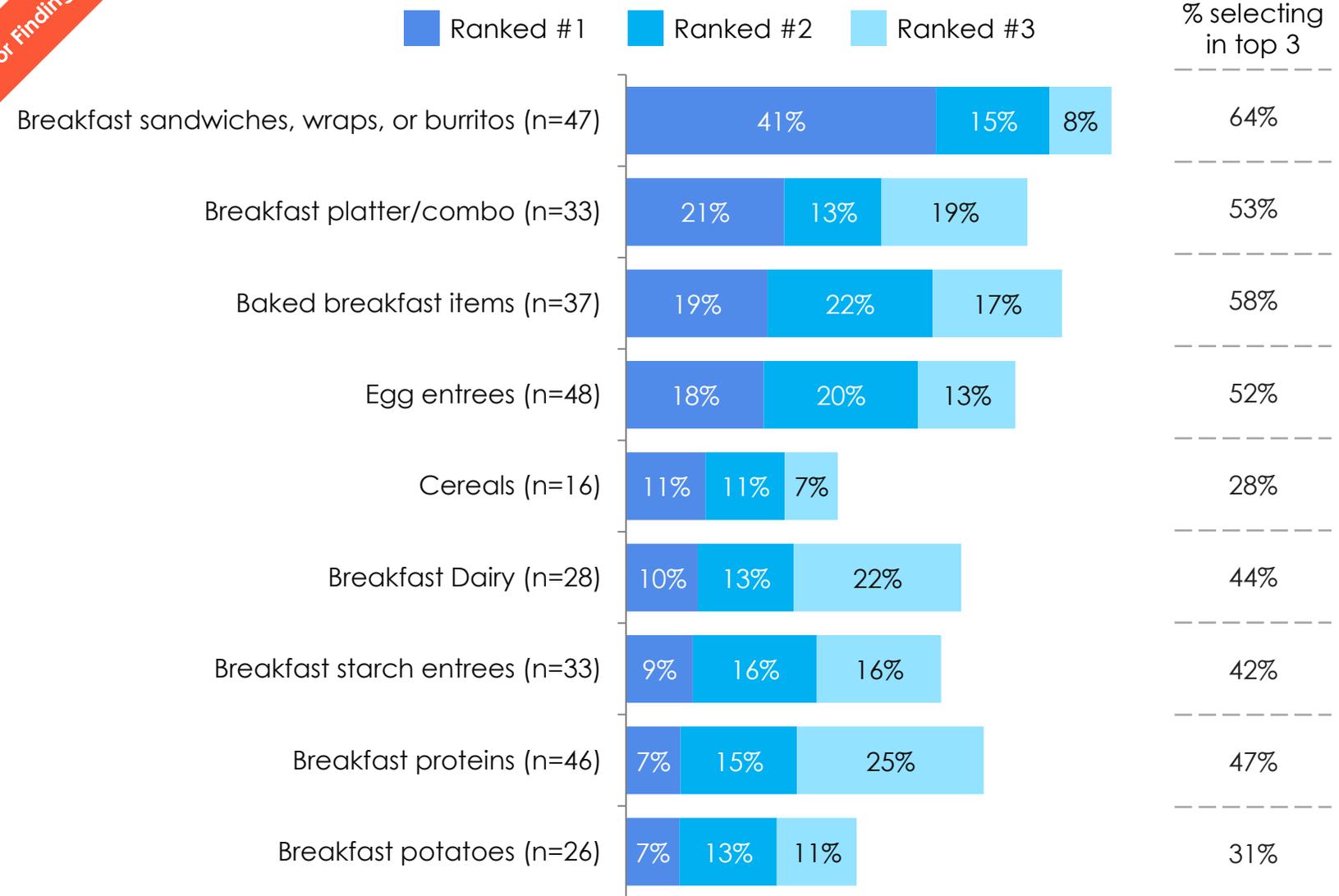


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