Foodservice Breakfast Trends in the U.S., 2nd Edition

Description: The breakfast daypart continues to help drive sales at full-service restaurants and limited-service eating places. In Foodservice Breakfast Trends in the U.S., 2nd Edition, it is estimated that restaurant breakfast sales will reach $47.4 billion in 2013, up 5% from 2012. Sales are forecast to rise by 5.6% in 2014 and 5.1% in 2015.

At limited-service restaurants, growth is being driven by player entrants; menu item innovation hitting healthfulness, indulgence, and quality notes; and coffee, tea and juice platform innovation. On the heels of rising guest usage during 2011-2013, brands such as Dunkin Donuts, Starbucks, Panera Bread, and Chik-fil-A are riding the trend.

Between 2009-2013 breakfast usage growth has been driven by adults age 65 and older, Asian consumers, and the part-time employed. Leveraging morning visits among coffee drinkers, the segment is also benefiting from workforce expansion and a growing pool of employed consumers.

Meanwhile, full-service breakfast usage trends suggest that a rebound is taking place. Breakfast daypart usage penetration has risen 26% from 2009 to 2013, a higher rate of growth than shown for other dayparts. While many family restaurant chains continue to face guest traffic challenges, brand-specific trends hold promise. And with more and more family restaurants experimenting with take out and portable menu options, the segment is poised to better compete with the limited-service competition.

Foodservice Breakfast Trends in the U.S., 2nd Edition can assist industry participants in understanding industry and consumer trends shaping this increasingly competitive environment, focusing on limited-service and family restaurant chains.

Key content includes:

- Trended guest traffic analysis for the foodservice breakfast daypart, including 2005-2013 limited-service and full-service restaurant usage trends; 2013 restaurant breakfast usage, segmented into eight foodservice channels; 2013 restaurant guest traffic volume and share estimates, by daypart; and 2013 foodservice breakfast traffic segmented by foodservice channel and split into weekday versus weekend and into on-premises, in-store pick up and drive thru.

- Assessment of breakfast restaurant menu trends over time, focusing on menu item penetration by restaurant segment, including analysis of menu terms relating to breakfast entrees, top proteins, and beverages. Menu item trend data is provided courtesy of Datassential, a leading food research company. Analysis is supported by a wealth of examples.

- Via proprietary consumer survey analysis, assessment of the degree to which consumers would be motivated to eat breakfast outside of their homes more often.

- A market size and forecast for the U.S. restaurant breakfast daypart, segmented by limited-service eating places and full-service restaurants. We also trend 2007-2012 consumer restaurant expenditures, exploring the relationship between household growth and restaurant spending by demographic and by limited-service and full-service segment, as well as daypart and breakfast spending by demographic.

The report also provides analysis of leading restaurant brands that focus on the breakfast daypart, spanning the snack and beverage, quick-service, fast casual and family restaurant segments. For each brand, we assess competitive differentiation; growth strategy; menu development and trending; consumer food lifestyle consumer segmentation analysis; guest traffic trending, by demographic; and sales performance and outlook.

Analysis is tailored narrowly to the breakfast daypart:

- Snack and beverage restaurants: Dunkin’ Donuts, Jamba Juice, Starbucks and Tim Hortons
- Quick-service restaurants: Burger King, Chick-fil-A, McDonald’s
- Fast casual restaurants: Einstein Noah Restaurant Group and Panera Bread
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