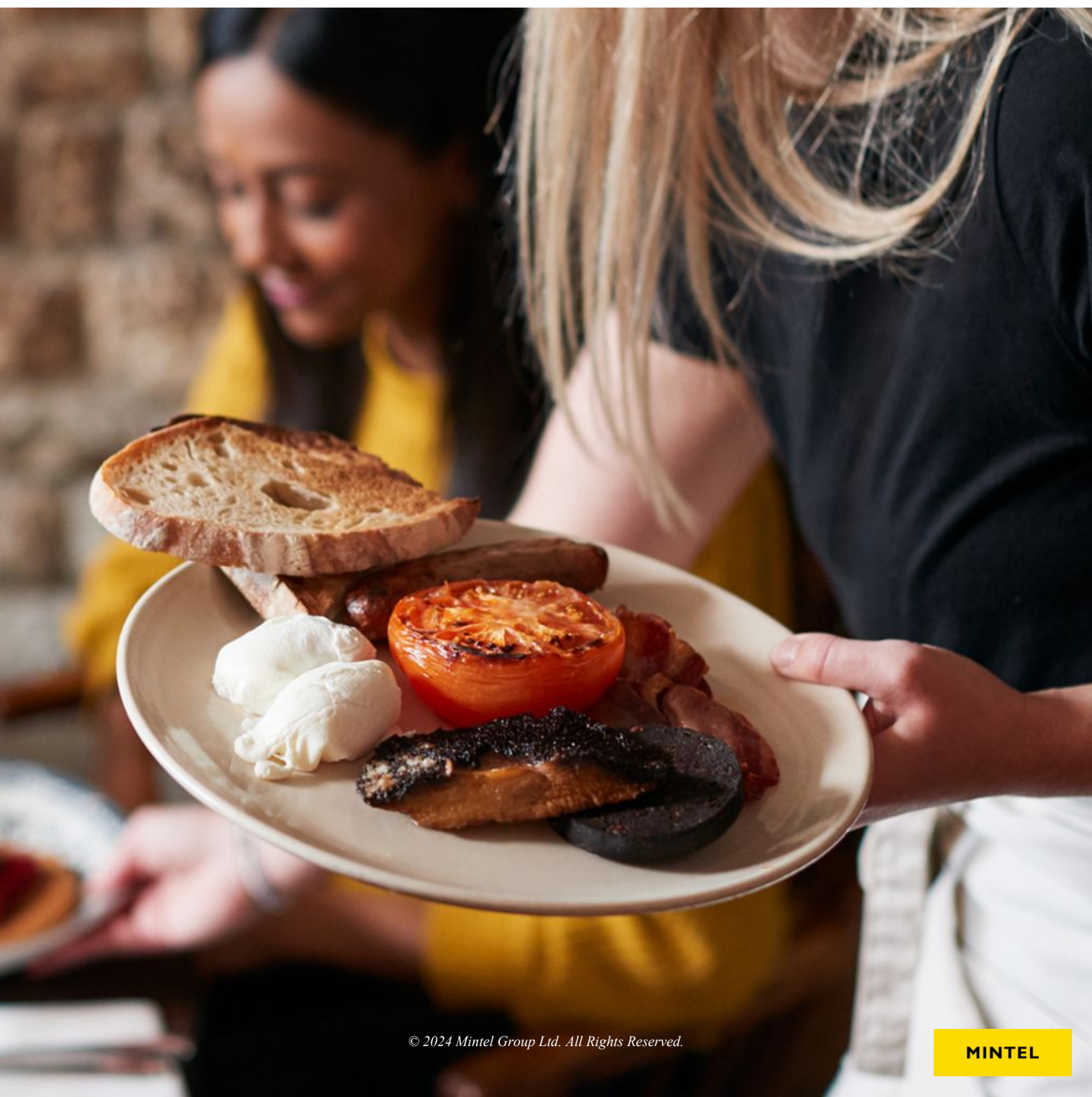


RESTAURANT BREAKFAST AND BRUNCH TRENDS – US – 2023

Increased breakfast/brunch occasions highlight the versatility, convenience, and relatively low cost of the AM. daypart, with room to build routines and loyalty.



Pooja Lal, Research Analyst



Restaurant Breakfast And Brunch Trends - US - 2023

This report looks at the following areas:

- Changes in breakfast/brunch ordering habits
- Breakfast/brunch ordering by operator segment and occasion
- Reasons for ordering AFH breakfast/brunch
- Breakfast/brunch attitudes and behaviors
- Important attributes in breakfast/brunch menu offerings and operational features

Overview

With almost 40% of consumers increasing their breakfast/ordering away from home, operators can build on this momentum by creating opportunities for more routine participation. As consumers remain challenged by inflation, foodservice breakfast and brunch operators can reposition themselves to appeal to consumers seeking to dine out on a budget. With lower-priced fares on menus compared to other dayparts, consumers looking to cut back their expenses will be able to enjoy morning AFH experiences more often.

As QSRs continue to be a leading destination for consumers to order breakfast/brunch, operators in full-service and LSR segments can borrow a page from their value-focused competitors to provide convenient breakfast solutions through speed and ease, at varying price points that fit consumers' budgets.



Increased breakfast/brunch occasions highlight the versatility, convenience, and relatively low cost of the AM. daypart, with room to build routines and loyalty.

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While younger consumers are interested in shaping their breakfast/brunch experiences to complement their lifestyles, operators can provide scalability within offerings through customization. Incorporating premium ingredients to elevate existing dishes will further allow diners to personalize dishes, providing them the autonomy to create dining experiences that fit their needs.

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Report Content

Key issues covered in this Report

- Overview

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Opportunities

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The restaurant breakfast and brunch consumer: fast facts

Meals ordered from restaurants

- Serve versatility for breakfast
 - Graph 1: meals ordered from restaurants, 2021-23
- The value of breakfast may not yet be seen
 - Graph 2: meals ordered from restaurants, by household income, 2023
- Bring snack-size breakfast items to the table
 - Graph 3: meals ordered from restaurants, by generation, 2023
- Use breakfast as a way to encourage diners to catch a break
 - Graph 4: meals ordered from restaurants, by work from home status, 2023

Frequency of breakfast or brunch ordering compared to last year

- Continue the momentum by weighing in on current trends
 - Graph 5: frequency of breakfast or brunch ordering compared to last year, 2023
- Cater breakfast formats to differing needs
 - Graph 6: frequency of breakfast or brunch ordering compared to last year, by gender, 2023
- Build routine AM. habits with Gen Zers
 - Graph 7: frequency of ordering breakfast or brunch compared to last year, by generation, 2023

Reasons for ordering foodservice breakfast/brunch

- Price matters, but consumers are willing to spend
- Price matters, but consumers are willing to spend
- Male diners want premium options for breakfast
 - Graph 8: reasons for ordering foodservice breakfast/brunch, by gender, 2023

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- Gen Z will shape experiences through quality
 - Graph 9: reasons for ordering foodservice breakfast/brunch, by generation, 2023

Ordering locations for foodservice breakfast/brunch items

- Value-centric breakfast is a mainstay
- Coffee shops and fast casuals can extend their reach to diners through convenient and elevated breakfast options
 - Graph 10: ordering locations for foodservice breakfast/brunch items, 2023

Reasons for ordering foodservice breakfast/brunch

- Foodservice breakfast can alleviate the pressure of planning
- Foodservice breakfast can alleviate the pressure of planning
 - Graph 11: reasons for ordering foodservice breakfast/brunch, 2023
- Brunch is the new dinner
 - Graph 12: reasons for ordering foodservice breakfast/brunch, by diner, 2023
- Make socializing at brunch a routine occasion
 - Graph 13: reasons for ordering foodservice breakfast/brunch, by gender, 2023
- AM cocktails are growing on menus, highlighting the impact of boozy brunches
- Cocktails on breakfast/brunch menus
- Convenience is music to Millennials' ears
 - Graph 14: reasons for ordering foodservice breakfast/brunch, by generation, 2023

Breakfast/brunch attitudes

- Classics should remain a staple on the menu, but twists are welcome
- Classics should remain a staple on the menu, but twists are welcome
- Brands level-up existing menu items with indulgent combinations
- It's never too early in the day to try something new
 - Graph 15: breakfast/brunch attitudes, by gender, 2023
- Millennials want breakfast on demand
 - Graph 16: breakfast/brunch attitudes, by generation, 2023

Important attributes when selecting foodservice breakfast/brunch

- Breakfast can't compromise on flavor
 - Graph 17: important attributes when selecting foodservice breakfast/brunch, 2023
- Pique female consumers with healthy, filling options on menus
 - Graph 18: important attributes when selecting foodservice breakfast/brunch, by gender, 2023
- A healthy breakfast is universal
 - Graph 19: important attributes when selecting foodservice breakfast/brunch, by generation, 2023

Interest in foodservice breakfast/brunch-related options

- Attract cost-conscious customers though value plays

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- Attract cost-conscious customers through value plays
 - Graph 20: interest in foodservice breakfast/brunch-related options , 2023
- Women seek balance through quality and affordability
 - Graph 21: interest in foodservice breakfast/brunch-related options, by gender, 2023
- Simplicity will win over Gen Xers
 - Graph 22: interest in foodservice breakfast/brunch-related options, by generation, 2023

COMPETITIVE STRATEGIES

Launch activity and menu innovation

- Wendy's adds savory, gourmet breakfast sandwiches to the menu
- Taco Bell debuts toasted breakfast taco in time for National Taco Day and the relaunch of its Taco Lovers Pass
- IHOP turns pancakes into tacos
- Snackable offerings take charge on QSR menus
- Bellagreen features French toast with a global twist
- McDonald's shows appreciation for educators with free breakfast
- Foodservice brands celebrate teachers with Teacher Appreciation Week
- Operators shake up the menu with fun fall menu items
- Seasonal menus spotlight healthy mash-ups
- Krispy Kreme hones in on nostalgia
- McDonald's innovates breakfast menu with existing ingredients
- Consumers are hacking breakfast menus to fit their tastes

Opportunities

- Highlight protein call-outs in marketing campaigns
- Protein call-outs in frozen retail breakfast offerings
- Make space for cleaner ingredients at breakfast
- Notable retail BFY breakfast product offerings

THE MARKET

Market context

- Market context

Market drivers

- Consumers are willing to cut back on dining out occasions
 - Graph 23: US changes consumers would make in their budgets, 2023
- Saturdays are the new Fridays

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms

Disclaimer

This is marketing intelligence published by Mintel.
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