



GAIN consumer insights

RECOGNIZE menu trends

IDENTIFY opportunities

ASSESS ingredients

EXAMINE pricing strategies

REFINE marketing

Now includes
COMPARATIVE
two-year
findings

The Breakfast Consumer Trend Report

Attitude and Usage Study

HELPING FOODSERVICE EXECUTIVES STAY SMART ABOUT BREAKFAST

TECHNOMIC INFORMATION SERVICES

Food industry information you can count on.

Introducing the *Breakfast Consumer Trend Report*, the essential resource for identifying breakfast trends and opportunities.

DISCOVER HOW TO BOOST INCREMENTAL SALES AND TRAFFIC DURING THE BREAKFAST DAYPART BY...

- ▶ **Meeting consumer needs:** Learn which attributes are most important to consumers at breakfast and how their needs differ based on occasion. For instance, appeal to the 71% of consumers who say high-quality options are paramount on the weekend and the 66% who say a convenient foodservice location is very important during the week.
- ▶ **Identifying actionable opportunities:** Understand consumer behavior and breakfast purchasing decisions to influence the behavior of the more than 80% of consumers who regularly eat breakfast at home and the 20% of consumers who bring breakfast from home to eat en route or at work or school.
- ▶ **Staying on top of consumption trends to support menu and product development:** Identify the foods and beverages consumers eat most often for breakfast during at-home and away-from-home occasions and why. Technomic's perceptual maps provide operators and suppliers with even deeper insight into which foods and beverages consumers associate with these breakfast occasions.
- ▶ **Appealing to niche markets:** Use insights culled from Technomic's attitudinal cluster analysis that classifies respondents as convenience-driven, health-conscious or at-home breakfast consumers to broaden your customer base.

COMPREHENSIVE COVERAGE

- ▶ **The latest consumer research:** An exclusive Technomic survey of 1,500 U.S. consumers showcases breakfast preferences, attitudes and purchasing behaviors. Data collected for 750 Canadian consumers is also available.
- ▶ **Comparative two-year survey findings:** Comparison data from Technomic's 2007 *Breakfast Category Report* reveals changes in breakfast preferences and purchasing behavior.
- ▶ **In-depth coverage and analysis of restaurant menus:** Recognize menu trends at the Top 250 chains, emerging chains and leading independents through a menu review powered by our MenuMonitor service.
- ▶ **Trends, key findings and actionable opportunities:** Gain additional **expert insight** into the future of breakfast offerings and better position your brand and your products for success in this increasingly competitive foodservice environment.

EXPANDED DELIVERABLES

- ▶ Comprehensive **executive summary** including insights, implications and areas of opportunity for operators and manufacturers.
- ▶ A **complete set of printed data tables** on all consumer interviews tabulated by cluster segments that include: gender, age, ethnicity, region and household income.
- ▶ Valuable appendices to the report include detailed **profiles of 15 innovative and emerging breakfast concepts** and a comprehensive set of **new, LTO and deleted breakfast items**.
- ▶ Report is featured on **Technomic Access**, our exclusive online tool allowing subscribers to conduct customized searches, download specific insights and graphics and create tailored presentations directly from the *Breakfast Consumer Trend Report*.
- ▶ An in-depth **PowerPoint Presentation** containing all report exhibits and corresponding key findings is also available.

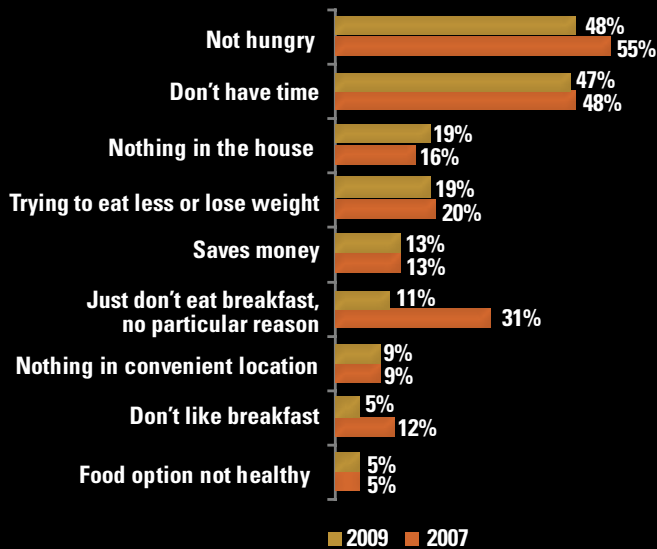


To obtain your copy of the *Breakfast Consumer Trend Report*, or for additional information, please contact Patrick Noone at (312) 506-3852.

Learn what more than 1,500 consumers are saying about breakfast...

WHICH OF THE FOLLOWING REASONS EXPLAINS WHY YOU WILL SKIP BREAKFAST DURING THE WEEK?

Select all that apply

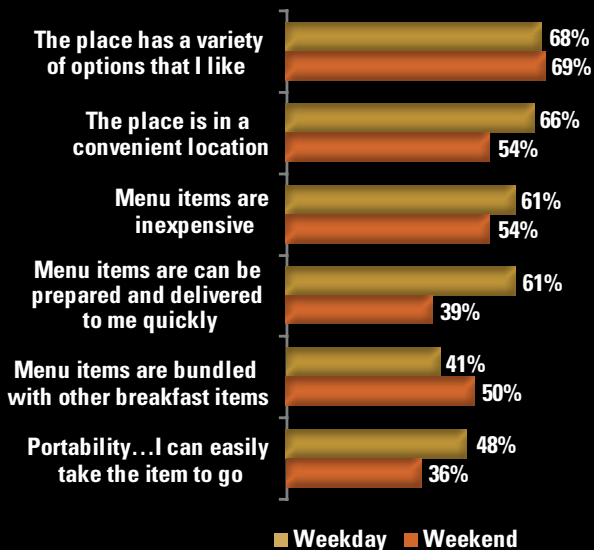


- **Analysis:** Almost half of today's consumers say they skip breakfast because they aren't hungry (48%). Further, 11% of consumers said there is no particular reason for why they don't eat breakfast and 5% said that they just "don't like breakfast." Fewer consumers surveyed in 2009 than in 2007 cited each of these reasons, suggesting that operators and retail manufacturers may be enticing more of these consumers to eat breakfast regularly with appealing options.
- **Analysis:** Many consumers (47%) forego breakfast during the week because of time constraints. These consumers likely do not have time to prepare breakfast at home or pick it up from a restaurant, indicating that speed of service, portability and convenience of location are crucial to the breakfast decision.
- **Analysis:** Nearly a fifth of consumers (19%) skip breakfast because they are trying to lose weight. Strengthening consumer associations between a healthy breakfast and overall personal well being could potentially encourage more consumers to regularly eat breakfast.

Base: 332 (2007) and 988 (2009) consumers aged 18+ who skip breakfast during the week

HOW IMPORTANT ARE THE FOLLOWING ATTRIBUTES WHEN CHOOSING A BREAKFAST ITEM YOU PURCHASE FROM A RESTAURANT OR OTHER FOODSERVICE LOCATION?

Top two box = important and extremely important



- **Analysis:** Consumers place greater importance on attributes related to time, convenience, price and portability for breakfast consumed during the week; more than three out of five consumers value convenience (66%), price (61%) and speed of preparation and delivery (61%) on these occasions. Considerably fewer consumers value these same attributes for weekend occasions, likely because consumers have more time to dedicate to breakfast on Saturdays and Sundays.
- **Analysis:** Variety, which was found to be most important to consumers overall was found to be equally important for both weekday (68%) and weekend (69%) breakfast occasions. This signals that operators and suppliers will want to offer consumers several options at breakfast and differentiate these items.
- **Analysis:** Bundling options seem to be especially important during the weekend. Since weekend away-from-home breakfast occasions are much more likely to take place at full-service restaurants, consumers may be primarily thinking about breakfast entrées that are automatically served with a side item, such as hash browns or fruit.

Base: 732 (weekday) and 791 (weekend) consumers aged 18+ who eat breakfast away from home on these days
Respondents indicated their opinion on a scale 1-6 where 6 = extremely important and 1 = not important at all

EMERGING AND INNOVATIVE BREAKFAST CONCEPTS PROFILED:

The Beehive
BLD Los Angeles
The Cereal Bowl
Egg
Eggfast

The Egg and I
Elmer's
Flying Biscuit Café
Hash House a Go Go
J. Christopher's

Jimmy's Egg
Le Peep
M. Henry
Orange
Sunny Street Café (formerly Rise & Dine)

ADDITIONAL REPORTS AVAILABLE

With 1,000–2,000 survey respondents per study, our Consumer Trend Reports provide in-depth data and analysis on consumer attitudes toward, and usage of, foodservice products, amenities and brands. Menu analysis and pricing information highlight industry trends and help facilitate benchmarking initiatives, while detailed company profiles and menus offer a thorough overview of dozens of leading chains. At a fraction of the cost of conducting this research on a proprietary basis, our comprehensive Consumer Trend Reports offer valuable insights and recommendations. Study titles include:

U.S. Foodservice Categories

- *Adult Beverage*
- *Appetizer*
- *Bakery Café*
- *Beef & Pork*
- *Beverage*
- *Burger*
- *Dessert*
- *Pizza*
- *Poultry*
- *Salad*
- *Sandwich*
- *Soup*

International Foodservice Categories

- *Canadian Pizza*
- *Canadian Sandwich*

Dining Occasions

- *Breakfast*
- *Dinner: Routine, Late Night & Special Occasion*
- *Retailer Meal Solutions*
- *Snacking*
- *Takeout*

Market Trends

- *College & University*
- *Flavor: Sauces, Dips and Condiments*
- *Future of Fast Foods*
- *Future of Fried Foods*
- *Generational Shifts Series*
 - Millennial, Generation-X and Baby Boomer reports can also be purchased individually.
- *Healthy-by-Design Foods*
- *The Hispanic Consumer*
- *Hotel F&B: On-Premise, Catering and Room Service*
- *Kids & Moms*
- *Pricing Strategies*

For ordering information, please contact Patrick Noone at 312-506-3852 or pnoone@technomic.com.

ABOUT TECHNOMIC INFORMATION SERVICES

Technomic Information Services has been tracking the foodservice industry for over 40 years, providing industry intelligence, forecasts, data and training support to manufacturers, operators and distributors and others allied to the field. Our numerous publications and digital products—featuring quick-read newsletters, analytical annual reports, training handbooks, sales guides and restaurant chain profiles—help industry leaders keep a finger on the pulse of the entire foodservice terrain. Technomic Information Services delivers distinctive, premium content to its customers.

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