

# Restaurant Breakfast and Brunch Trends - US - 2022

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## This report looks at the following areas:

- Daypart and breakfast/brunch ordering
- Changes in breakfast/brunch ordering patterns
- Breakfast/brunch ordering by operator segment and occasion
- Breakfast/brunch attitudes and behaviors
- Interest in breakfast/brunch menu and operations features

Despite the seismic shifts to routines and a heightened call for controlled discretionary spending, the majority of breakfast diners are actually maintaining or even increasing their participation, indicating that breakfast habits may be hard to shake. The relative affordability of breakfast perhaps makes it slightly less vulnerable to rising prices compared to lunch or dinner, suggesting that breakfast may be a solid space for operators to sustain or grow traffic.

Still, lingering elevated prices could have longer-term impact on overall occasions, restaurant choice and even menus in a number of ways: diners trading down, up or out. Among the salient 20% who are cutting back on ordering breakfast/brunch, nearly two thirds cite higher prices and 46% of diners say the price of the items affects where they order breakfast/brunch. Building relationships with diners means making away-from-home breakfast a habitual routine and encouraging customers to boost their visitation frequency, and it must be grounded in value.

While breakfast occasions are gaining momentum, there is still ample room to drive morning visitation and ordering. Diners are more than twice as likely to dine "out" for dinner or lunch. Yet, nearly half of Gen Z and Millennials report increased foodservice breakfast occasions this year, compared to only about a quarter of Gen X and older, a bellwether of changing restaurant traffic patterns and a slow visitation evolution. Gen Z and Millennial are prolific diners for brands to build breakfast loyalty with, and they have more fluid demands,



"In a time when value has heightened importance, the relative affordability of many breakfast and brunch options makes the daypart a solid place to drive traffic. While menu diversity can be a call to action that differentiates between operators, incentives in loyalty programs not only inspire occasions, but also secure a spot in AM routines."

– Pooja Lal, Analyst, US Foodservice and Mintel Menu Insights

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signaling a call for operational and menu updates to meet their contemporary needs.

The biggest challenge to operators to grow morning occasions is also the strongest opportunity: tapping into the habits of breakfast. More than half of consumers eat the same breakfast on most days, yet just short of a quarter of breakfast diners report dining out for breakfast is part of their routine. In a time when change is among a primary constant and the need to demonstrate value is almost universal, there is no better time to create loyalties and incentivize visitation with rewards programs that create a call to action while securing a spot in AM routines.

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