

Breakfast and the Expanding Morning Occasion

Proposed 2027 Research Program #12743

Introduction

Breakfast remains one of foodservice's most adaptable occasions. It can be a traditional sit-down meal, a portable sandwich, a snack, a beverage-led purchase, or an offering consumed well beyond conventional morning hours. Operators across restaurants, convenience stores, colleges and universities, K-12 schools, lodging, healthcare, senior living, and workplace foodservice are reconsidering how they compete for morning traffic while managing labor, speed, value, and changing customer routines.

The opportunity extends far beyond bakery. Eggs, meat, cheese, potatoes, fruit, yogurt, breakfast sandwiches, handhelds, coffee, specialty beverages, energy drinks, protein beverages, and bundled meals all play a role. This study will examine which products, formats, and operating approaches are gaining momentum; how operators are making menu and purchasing decisions; and where manufacturers can help operators grow breakfast participation without adding unnecessary complexity.

This proposal is a working research framework that will be refined with study sponsors before fieldwork begins.

Overall Objectives

- Assess current and expected growth in breakfast and morning foodservice across commercial and noncommercial channels.
- Identify the products, menu formats, beverages, and service models operators believe offer the strongest growth potential.
- Understand how changing morning routines, traffic patterns, value expectations, and all-day availability are influencing operator strategies.
- Evaluate how labor, equipment, preparation requirements, speed of service, waste, and consistency affect breakfast menu decisions.
- Determine how operators select breakfast products and suppliers and where current offerings fail to meet their needs.
- Identify practical opportunities for manufacturers in product development, packaging, merchandising, menu support, and customer-specific solutions.
- Provide sponsors with a how-to-win framework for targeting breakfast and the broader morning occasion.

Proposed Key Issues

To be refined with sponsor input during kickoff.

The Breakfast and Morning Opportunity

- How important is breakfast to traffic, sales, profitability, and customer loyalty across different foodservice channels?
- How has breakfast performance changed during the past several years, and what do operators expect during the next three to five years?
- Which channels, customer groups, and types of operations offer the strongest potential for breakfast growth?

- How are hybrid work, commuting patterns, school schedules, travel, and changing daily routines affecting the morning occasion?
- Where does the traditional breakfast daypart end, and how important are all-day breakfast, late-morning snacking, and breakfast-for-lunch or dinner?
- What are the most significant barriers to expanding breakfast participation or menu variety?

Menu and Product Opportunities

- Which food and beverage categories are gaining, maintaining, or losing operator interest?
- What is the outlook for breakfast sandwiches, burritos, bowls, bakery items, eggs, proteins, potatoes, fruit, yogurt, and other portable formats?
- How are operators balancing familiar favorites with global flavors, premium products, limited-time offers, and menu innovation?
- Where are operators seeking higher-protein, lower-sugar, plant-forward, gluten-free, or otherwise health-positioned options?
- Which products are most effective for increasing check averages, attachment, repeat visits, and participation?
- Where do operators see meaningful gaps in available breakfast products, formats, portion sizes, or quality?

Beverages and the Morning Occasion

- How important are coffee and other beverages in driving morning visits and overall breakfast economics?
- What is the outlook for hot and iced coffee, cold brew, espresso-based beverages, tea, juice, smoothies, energy drinks, functional beverages, and protein beverages?
- Which beverage attributes, formats, flavors, and customization options are becoming more important?
- How do operators approach beverage-food pairing, bundles, refills, subscriptions, and other traffic-building strategies?
- Where do equipment, training, throughput, product consistency, or ingredient waste limit beverage program development?
- What support do operators want from beverage and ingredient manufacturers?

Value, Pricing and Merchandising

- How are operators responding to price sensitivity while protecting breakfast margins?
- Which value meals, bundles, promotions, loyalty offers, and portion strategies are most effective?
- Where will customers pay more for quality, convenience, customization, health benefits, or premium ingredients?
- How important are grab-and-go displays, menu boards, digital ordering, packaging, product visibility, and point-of-sale merchandising?
- What causes operators to promote one breakfast item or supplier-supported program more heavily than another?

Operations, Labor and Execution

- How do staffing levels and employee skill requirements influence the number and type of breakfast products offered?
- Which preparation formats are preferred: scratch, speed-scratch, ready-to-cook, ready-to-heat, thaw-and-serve, or fully prepared?
- Where are pre-portioned, pre-cooked, frozen, chilled, or commissary-produced products gaining acceptance?
- What tradeoffs will operators accept among labor savings, product cost, speed, consistency, customization, and perceived quality?
- Which equipment constraints most often prevent operators from adding or expanding breakfast items?
- How important are holding performance, shelf life, portability, ease of preparation, cross-utilization, and waste reduction?

Purchasing and Supplier Selection

- Who influences breakfast menu, product, and supplier decisions within different operator organizations?
- Which product attributes carry the greatest weight when operators evaluate a new breakfast item?
- What are the most common reasons products are tested but not approved—or approved but not successfully rolled out?
- How important are distributor availability, case size, minimum orders, rebates, contracts, and national account support?
- Where do operators want more menu ideas, culinary support, consumer insights, training, merchandising, equipment assistance, or operating guidance from manufacturers?
- How can suppliers differentiate themselves beyond product and price?

Channel Differences

- How do priorities and operating needs differ among QSRs, fast casual restaurants, c-stores, colleges and universities, K-12 schools, lodging, healthcare, senior living, and workplace foodservice?
- Which products and formats translate effectively across channels, and which require channel-specific solutions?
- How do captive-audience, commuter, residential, retail, and delivery-oriented environments change the breakfast opportunity?
- Where should manufacturers concentrate sales, innovation, and channel-development resources?

Proposed Product Scope

The product scope will be finalized with sponsors and may include the following categories.

Foods

- Eggs and egg-based items
- Breakfast meats and other animal or plant-based proteins
- Breakfast sandwiches, biscuits, burritos, wraps, bowls, and handhelds
- Potatoes, sides, and small plates
- Bagels, muffins, donuts, pastries, breads, tortillas, and other bakery products
- Fruit, yogurt, parfaits, oatmeal, cereals, and better-for-you items
- Sauces, spreads, cheese, and other components
- Prepared, frozen, chilled, and speed-scratch breakfast solutions

Beverages

- Hot and iced coffee, espresso beverages, and cold brew
- Tea, juice, dairy, and plant-based beverages
- Smoothies and blended beverages
- Energy, functional, hydration, and protein beverages
- Flavor systems, creamers, sweeteners, toppings, and beverage components

Supporting Products and Services

- Portable and grab-and-go packaging
- Portion-control formats and dispensing systems
- Food and beverage equipment
- Merchandising, menu, digital ordering, and operational support

Proposed Operator Coverage

The research will focus exclusively on foodservice operators. No consumer research is proposed. Final quotas will be established with sponsors to ensure the sample reflects the channels most important to participating companies.

- Quick-service and fast-casual restaurants
- Full-service and family-style restaurants where appropriate
- Convenience store foodservice
- College and university dining
- K-12 foodservice
- Healthcare and senior living
- Lodging
- Business and industry/workplace foodservice
- Other high-opportunity commercial or noncommercial segments identified with sponsors

Proposed Methodology

Final sample design and research instruments will be shaped with sponsor input.

1. Engagement Initiation

- Private kickoff discussions with each sponsor to review objectives, business priorities, categories, and intended uses of the research.
- Sponsor review of the operator questionnaire and discussion guide before fieldwork.
- Confidential sponsor-only questions incorporated into the research and reported privately.

2. Existing Data Review

- Review of public information, operator menus and programs, industry reporting, and relevant FSIP proprietary research.
- Development of a baseline assessment of breakfast performance, menu activity, operating pressures, and category direction.

3. Quantitative Operator Research

- Approximately 200 nationwide interviews with qualified foodservice operators responsible for menu planning, purchasing, culinary, operations, or breakfast program decisions.
- Coverage of relevant commercial and noncommercial segments, with quotas refined according to sponsor priorities.
- Measurement of current practices, product usage, purchasing criteria, operating barriers, growth expectations, unmet needs, and future plans.

4. In-Depth Channel Interviews

- Approximately 20–25 in-depth discussions with selected operator and distributor executives and decision-makers.
- Exploration of breakfast strategy, menu development, product testing, labor and equipment constraints, sourcing, supplier relationships, and best practices.
- Inclusion of representative operator examples and strategic context that explain the reasons behind the quantitative findings.

5. Strategic Analysis and Reporting

- Integration of quantitative and qualitative findings into a comprehensive assessment of the breakfast and morning opportunity.
- Identification of priority channels, categories, operating needs, product opportunities, and implications for manufacturers.
- Development of a practical how-to-win framework for sponsor sales, marketing, innovation, and business planning.

Study Deliverables

- Comprehensive PowerPoint report featuring detailed analysis, strategic implications, charts, and executive commentary.
- Assessment of breakfast growth, channel differences, operator strategies, product and beverage opportunities, operational needs, and future direction.
- Operator segmentation and identification of the factors that differentiate leading breakfast programs.
- Practical recommendations for product development, packaging, menu support, merchandising, sales, and channel strategy.
- Complete operator research instruments, cross-tabulations, and supporting data appendix.
- Confidential reporting of each sponsor's proprietary questions.
- Sponsor presentation and discussion following internal review of the report.
- Ongoing access to FSIP for follow-up questions and interpretation at no additional cost.
- Optional post-study strategy workshop to translate findings into company-specific growth priorities and action plans.

The Strategic Value to Sponsors

This study is designed to identify where manufacturers can create value for operators—not simply which breakfast items are popular. It will connect menu and category opportunities with the operational realities that determine whether products are purchased, executed consistently, and supported across multiple locations.

Sponsors will gain a clearer understanding of which channels and operator needs deserve priority, how food and beverage opportunities fit together, where current products fall short, and which forms of manufacturer support can strengthen customer relationships and improve the likelihood of adoption.

Foodservice IP's Experience

Foodservice IP's engagement team includes experienced foodservice strategists and researchers with backgrounds in growth strategy, channel assessment, operator research, menu and product analysis, distribution, innovation, and go-to-market planning. The project will be led by Tim Powell, Principal, who has advised foodservice manufacturers and industry organizations for more than 20 years.

Senior FSIP consultants remain involved from study design through analysis, reporting, and sponsor discussions. This continuity helps ensure that the research addresses practical business questions and produces useful strategic guidance rather than a stand-alone collection of survey findings.

Timing and Fees

- Anticipated project duration: approximately 12–14 weeks from initiation.
- Target kickoff: late fourth quarter 2026.
- Target delivery: first or second quarter 2027, depending on sponsor timing and final fieldwork scope.

- Pre-launch sponsors will help refine study objectives, channel coverage, product scope, and research priorities.
- \$15,000 per sponsor for one study.
- Discounted participation: two studies for \$26,500 or three studies for \$35,000 when confirmed together.
- Private, in-person presentations are exclusive of travel expenses.

Billing Policy

- 50% upon project initiation
- Balance due upon delivery of the final report

Conclusion

Breakfast offers manufacturers opportunities across far more than a single daypart or product category. Growth will depend on understanding how operators balance customer demand with labor, speed, equipment, value, consistency, and ease of execution. This study will provide sponsors with direct operator evidence and strategic recommendations for competing across food, beverage, and supporting product categories.

Foodservice IP's shared-cost research model combines broad industry evidence with sponsor customization and ongoing strategic support. Sponsors help shape the work, receive confidential coverage of their priority questions, and retain access to the study team after delivery.

Participation Authorization

Our company confirms participation in the Foodservice IP multi-client study, Breakfast and the Expanding Morning Occasion #12743, in the amount of \$15,000.

Billing will follow the terms described in this proposal: 50% upon project initiation and the balance upon delivery of the final report.

Name

Title

Company

Address

Email

Signature

Date

To participate, please sign this page and return it to tpowell@foodserviceip.com. Questions may be directed to Tim Powell at 312-600-5151.