



incredible!

# BREAKFAST BEAT

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## All-Day Success

One of the top trends identified by The Food Channel for 2011 is, “Breakfast foods have begun to permeate meals throughout the day.” Whether it’s all-day availability of breakfast, breakfast ingredients found in other dayparts, or traditional lunch/dinner items made with breakfast ingredients and offered in the morning, the trend is growing.

Warren Solochek, VP of Client Development with NPD’s Foodservice Group states, “Morning meal has been a bright spot in the industry and chains are

capitalizing on it. The less expensive price points associated with breakfast items have resonated with consumers.” And that attraction doesn’t stop at 11 a.m.

The success of Bojangles’ Famous Chicken ‘n Biscuits proves the point. The chain opened its 500th location in June and says it plans to open a new store every nine days throughout 2011. Bojangles’ derives 40% of sales from its all-day breakfast menu and has enjoyed same-store growth for five years.

Coincidence? We don’t think so.

### DID YOU KNOW?

- Recent studies show eggs have less cholesterol than ever before. The United States Department of Agriculture (USDA) recently reviewed the egg nutrient data. The results show the average amount of cholesterol in a Grade A, large egg is 185mg, 14% lower than the 212mg previously recorded. The latest version of the USDA database, release 23, includes the most up-to-date nutrition information from this analysis.
- One possible cause for the decrease in cholesterol level is the improvement in the feed given to hens. A poultry nutrition specialist balances the feed given to hens to assure nutrients specifically required for the hens are provided.
- The nutrient content of eggs from the same breed of hen fed the same diet is not affected by whether hens are raised free-range or in floor or conventional operations. It is solely determined by the feed.

## Consuming Interest

Egg white sandwiches are popping up on many menus. Despite the fact that egg white versions of whole-egg sandwiches commonly come with a reduction of only 20-30 calories per sandwich, egg white sandwich fans are a growing segment.

Subway wasn’t the first chain to offer egg white sandwiches, but it made news with its 2010 breakfast launch by saying any breakfast item could be ordered in either whole egg or egg white versions. Many chains have added egg white options since then. Diners can now choose from a wide variety of creative egg white sandwiches at Dunkin’ Donuts, Denny’s, Bruegger’s Bagels, Tim Horton’s, Caribou

Coffee, Einstein Bros. Bagel, Corner Bakery, and Manhattan Bagel, to mention just a few!



## Electronic Connections

More chains are recognizing the value of electronic communications for building sales and loyalty. Here are examples of two smart marketers' use of electronic media:

### DUNKIN’ DONUTS

- 53,000 Twitter followers – deals, intros, breakfast sandwiches, contests, replies to comments, current location of its new Hearty Food Truck.
- 3M+ Facebook fans – its DDSMART menu, eating smarter on the go,

connecting with fans, increasing loyalty.

- Over 500,000 views of its brand channel on YouTube.

### STARBUCKS

- Among other advantages, the Starbucks Card Mobile App allows patrons to use cell phones to pay at almost 9,000 U.S. locations.
- Corporate blog, [twitter.com/mystarbucksidea](http://twitter.com/mystarbucksidea), solicits customer ideas for improvements.



# Chain News

## MENU NEWS

- Bruegger's Bagels – Skinny Zesty Egg White Sandwich, made with turkey sausage, Swiss and sundried tomato spread on a “skinny” sesame bagel
- Au Bon Pain – Egg Whites & Cheddar, with three egg whites and melted Cheddar on a “skinny” bagel (LTO)
- Krystal – Omelet Scrambler, a loaded omelet of eggs, peppers, onions, sausage or bacon and a bowl of grits
- Dunkin' Donuts – Blueberry Waffle Breakfast Sandwich has scrambled egg, maple-flavored sausage, and American cheese (LTO)
- Subway – avocado spread (sliced avocados in California) has been added to its all-day options

## COMPANY NEWS

Quiznos and Hess Corporation are partnering to locate 50 new Quiznos restaurants within Hess gas-and-retail outlets in Florida. Featuring hot breakfast items and signature sandwiches, this move furthers Quiznos' strategy of becoming a prime QSR partner to the C-store market.

# By the Numbers

- Although QSR traffic was up only 1% during the quarter ended Feb 2011 versus prior year, breakfast food sales were up 4%. <sup>(1)</sup>
- Restaurant breakfast sales are projected to increase 4.1% in 2011. <sup>(2)</sup>
- 47% of survey participants have been to a restaurant for breakfast in the past month. <sup>(3)</sup>
- At QSR all-day breakfast chains, menu importance of breakfast foods rose by 59% **at lunch** between 2007 and 2010. <sup>(1)</sup>
- 41% of survey respondents expect healthier breakfast food options to cost more. <sup>(3)</sup>
- Total QSR segment servings of breakfast foods and eggs **served outside of the morning daypart** rose by 13% between 2007 and 2010. <sup>(1)</sup>
- For the year ending June 2010, Americans made 13 billion morning restaurant visits, up 18% from 2005. <sup>(1)</sup>

# Counting Calories

The FDA plans to issue its restaurant nutrition labeling rules by year's end, with the law taking effect six months later. When looking at potential brand and menu fallout, keep a few things in mind:

- **Small steps can impart a better-for-you (BFY) image.** One example would be Subway's continuing positive media attention after the April announcement of reduced sodium in its Fresh Fit sandwich line.
- **“Lower than” shows that chains are mindful of health.** Note Dunkin' Donuts' flatbread egg white sandwiches with less than 300 calories, and Applebee's popular line of “Great Tasting and Under 550 Calories™ Menu” items.
- **Limited-time-offers (LTOs) provide loopholes.** Items on a menu for less than 60 days are excluded from labeling rules.

With the recent promotion of USDA's new MyPlate concept added to the impending labeling legislation, smart marketers will use newsworthy menu changes to establish themselves as BFY leaders rather than followers.



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## SOURCES

1. The NPD Group / CREST®, May 2011
2. MINTEL, February 2011
3. MINTEL, Healthy Dining Trends – U.S. – May 2011