



Breakfast Brief

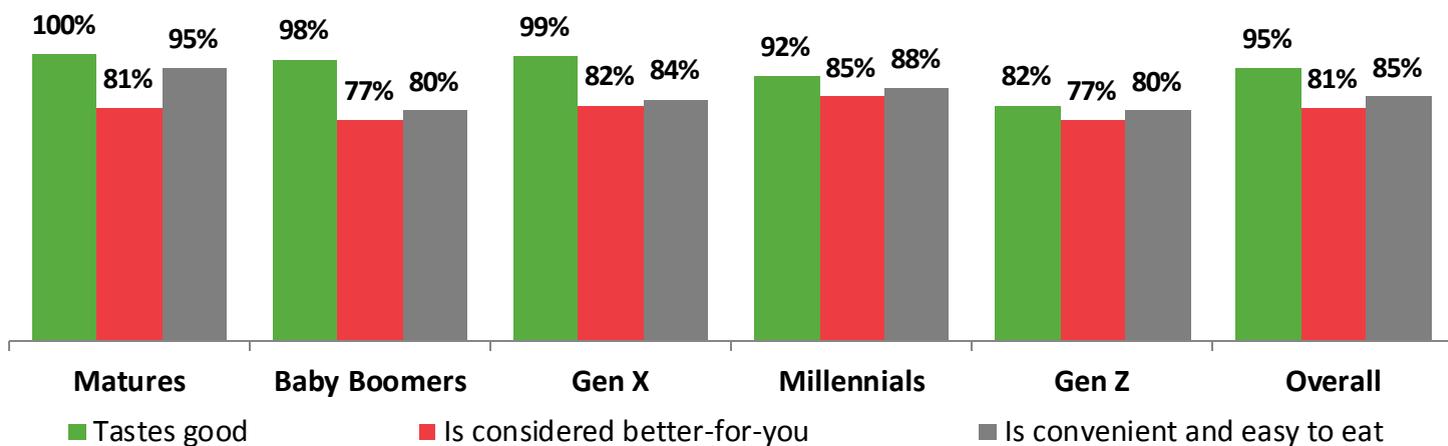
Hospitals

Hospitals are working hard to attain a favorable perception of their foodservice. One of the bigger challenges for hospitals is gauging consumers' foodservice needs for three distinct types of diners — staff, visitors and patients. Each of these consumer groups has different demands and hospitals must find a way to cater their foodservice to fit everyone's requirements. In addition, as consumers increasingly become aware of and want to know what is in their food, hospitals will need to continue their efforts to showcase quality, better-for-you menus and promote transparency.

Breakfast Attributes

Consumers rated taste above convenience and better-for-you as the most important attribute when eating breakfast in a hospital foodservice setting. Matures in particular stand out, with 100% of this generation saying the taste of breakfast food/beverage is

Please indicate how important or unimportant each of the following is for breakfast in a hospital foodservice setting (e.g., in-patient dining, cafeteria, restaurant, kiosk, etc.).
(Top two box = very important and somewhat important)



Base: 697 consumers who have had prepared food/beverage in a hospital facility in the last three years
Consumers indicated their opinion on a scale of 1 to 5 where 5 = very important and 1 = not important at all



important. Older consumers also put more value on convenience and ease of eating than their younger counterparts, with 95% of respondents born before 1946 agreeing. These statistics are not particularly surprising given the fact that many hospital patients are Matures and have likely experienced foodservice in hospitals more than other generations.

It is noteworthy that hospitals are known for health and wellness yet consumers were least likely to rank better-for-you breakfast food/beverage as important (81%). Notably, more men (84%) than women (78%) value better-for-you breakfast at hospitals, and Millennials (85%) ranked it higher than any other generation.

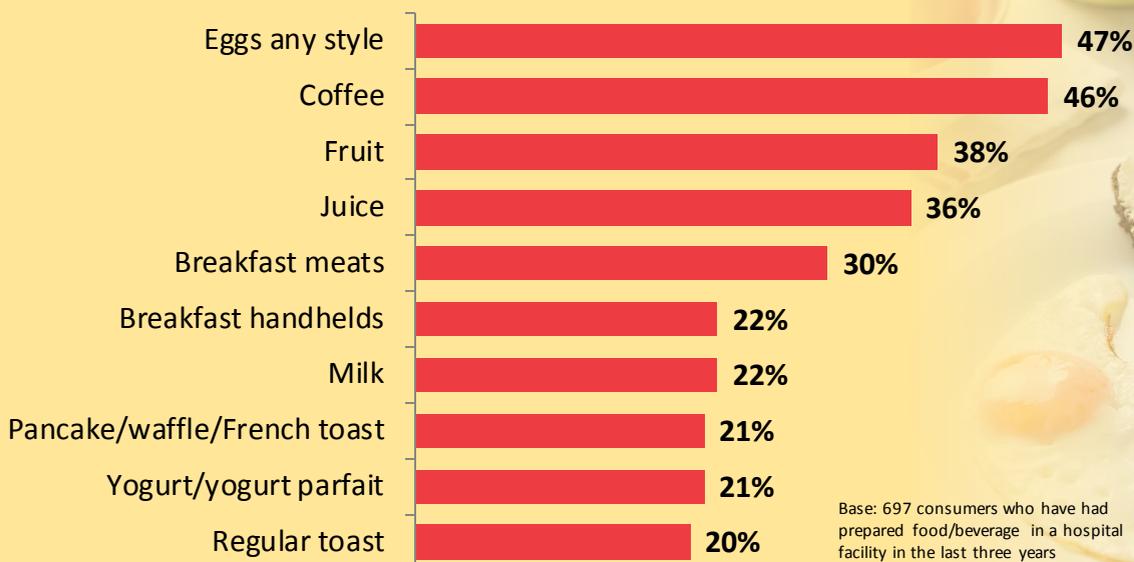
Breakfast Food/Beverage Preferences

When asked what type of food or beverage is most preferred for breakfast at a hospital foodservice setting, almost half of respondents (47%) selected eggs any style (includes omelets and fried and scrambled varieties), followed closely by coffee (46%). Other favored breakfast items include better-for-you options like fruit (38%) and juice (36%), and slightly less preferred indulgent options such as breakfast meats (30%) and pancake/waffle/French toast (21%).

Ethnicity proved to be an interesting demographic breakout for hospital breakfast food/beverage preferences. Some takeaways include:

- 52% of African Americans and 49% of Hispanics prefer coffee for breakfast, whereas only 25% of consumers with a mixed ethnic background say the same

What type of food/beverage do you most prefer for breakfast at a hospital foodservice setting (e.g., in-patient dining, cafeteria, restaurant, kiosk, etc.)? Please choose top five. (Top 10 responses shown)



- Consumers with a mixed ethnic background are much more likely (25%) to prefer bagels over Asians (7%) and African Americans (9%)
- Preference for vegan/vegetarian options like soy-based bacon, sausage or cheese also has a great demographic bifurcation: While only 6% of consumers overall say they prefer these options, consumers of a mixed ethnic background seem to have a much stronger preference (25%)

Breakfast Entrees

Breakfast starch is the leading course category for menued breakfast entrees, followed closely by egg dishes then a subsequent steep drop-off to sandwich. Cereal/granola, French toast and pancakes are the leading breakfast starch entrees, respectively, whereas scrambled eggs and cheese omelet are the top egg dishes.

Top Hospital Breakfast Entree Categories



Top Hospital Breakfast Dishes



Base: Q1 2016 MenuMonitor, Technomic

There is a wide disparity between what we're seeing menued for breakfast at hospitals and what consumers want: Although egg dishes align (with high menu incidence and consumer preference in both), many other menu categories diverge. For example, although cereal/granola is the most menued breakfast entree product at hospitals, only 17% of consumers prefer cereal for breakfast in this setting, and while oatmeal rounds out the top five most menued entree products list, only 19% of consumers prefer it.



Because hospital menus are typically straightforward, there is ample opportunity for entree innovation. Let's take a look at some trend opportunities and applications at hospitals:

Trend	What	Where
 <p>Mashups</p>	<p>Traditional lunch or dinner preparations combined with classic breakfast ingredients</p>	<p>Breakfast Pizza with bacon, egg and cheese (Boone County Hospital in Boone, Iowa)</p>
 <p>Supergrains</p>	<p>Better-for-you grains like quinoa and farro in dishes like oatmeal and breakfast bowls</p>	<p>Breakfast Farro with mango (Mount Sinai New York University Health in New York City)</p>
 <p>Ethnic</p>	<p>Flavor, ingredient and dish influences particularly from Latin America and Asia</p>	<p>Breakfast Burrito with scrambled eggs, grilled onions and peppers and jack cheese in a whole-wheat tortilla, served with salsa (Swedish Medical Center – Providence Campus in Seattle)</p>
 <p>Spicy</p>	<p>Hot spices and sauces infused in or spread atop breakfast sandwiches</p>	<p>Sriracha Bagel Sandwich (Mount Sinai New York University Health in New York City)</p>

Breakfast Beverages

Hot tea is the leading breakfast beverage offered at hospitals, followed by juice and milk/chocolate milk. Top hot tea flavors are green tea, lemon and raspberry, respectively. Juice, the breakfast beverage with the second highest incidence, is comprised of mainly traditional varieties like orange, apple, cranberry, grape and tomato.

Proprietary beverages are sparse at hospitals, which presents an opening for operators to create specialty breakfast beverages. Innovation could include:

- Adding a flavored syrup to coffee
- Steeping fruit preserves in tea
- Whisking juice with jam or jelly
- Pureeing fruit preserves in a milk-based smoothie
- Pouring flavored syrup in sparkling water

As with entrees, the disparity between what we're seeing on hospital breakfast menus and consumer preferences is vast within the beverage mealpart. Hot tea tops the list of menued breakfast beverages but only 15% of consumers prefer it. More opportunity lies in coffee at hospitals, as almost half of consumers (46%) prefer it.

Top Hospital Breakfast Beverages

- ❖ Hot tea
- ❖ Juice
- ❖ Milk/chocolate milk
- ❖ Coffee/filter coffee
- ❖ Hot chocolate/hot cocoa

Base: Q1 2016 MenuMonitor, Technomic



Nutrition at Breakfast

Hospital facilities are making large strides toward offering better-for-you foodservice programs. Even though consumers ranked better-for-you fare as less important than taste and convenience during hospital breakfast occasions, still four out of five respondents deem it important, so it's not to be disregarded.

When asked what attributes are most important during breakfast dining occasions at hospitals, fresh was far and away the leader of the pack. This is unsurprising as freshness is a leading buzzword in the foodservice industry today. Natural and homemade/housemade round out the top three, and healthy "additive" descriptors like high protein and high fiber were also considered important.

Which of the following attributes are most important to you during a breakfast dining occasion at a hospital foodservice setting (e.g., in-patient dining, cafeteria, restaurant, kiosk, etc.)? (*incidence*)



Base: 697 consumers who have had prepared food/beverage in a hospital facility in the last three years



NEWS BEAT:

Major Better-for-You Moves by Hospitals in 2016

**Jan
2016**

Hospital parent MaineHealth spotlights better-for-you eating by soliciting from its hospitals recipes that feature local fruits and vegetables.

**April
2016**

As part of its initiative to expand its health and wellness programs globally, Henry Ford Hospitals in Detroit licenses its hospital food recipes to a provider in India to be sold in corporate food courts.

**Feb
2016**

Hackensack University Medical Center in New Jersey unveils plans to serve only antibiotic-free pork and beef, riding on the coattails of its antibiotic-free chicken.

**March
2016**

Boston Medical Center opens a new cafeteria with a menu that emphasizes healthy international fare.



FEATURED RECIPE

[Serving Size: 8]

Ingredients

Crisco Professional® Pan Release Spray
 18 oz. of country-style whole-grain bread, cut into 1-inch cubes
 10 oz. of breakfast sausage, crumbled, cooked
 1.25 cups of yellow onion, julienne, sauteed
 2 cups of red, yellow and orange bell peppers, julienne, sauteed
 12 of eggs, large
 4 cups of PET® evaporated milk
 1.5 tbsp. of kosher salt
 1 tsp. of black pepper, coarse-ground
 4 cups of cheddar cheese, sharp, shredded

Directions

Step 1: Spray 3 deep one-third-size steam table pan with Crisco Professional® Pan Release Spray.

Step 2: Layer bread, sausage, onions and peppers in pan.

Step 3: Whisk together eggs, PET® Evaporated Milk, salt and pepper; pour over top. Sprinkle evenly with cheese.

Step 4: Cover and refrigerate overnight.

Step 5: Preheat conventional oven to 350°F.

Step 6: Bake covered for 45 minutes. Remove cover and bake 20 minutes or until top is golden brown and center is set. Cool for 5 minutes and cut each pan into 4 equal portions.

To assemble single serving: Serve 1 portion on plate. Serve with seasonal fruit, if desired.

Egg Strata



NUTRITION FACTS

Serving Size: 8 0

Amount/Serving

Calories 0

	Per Srv	% Daily Value		
Total Fat	0g	%		
Saturated Fat	0g	0%		
Trans Fat	0g	%		
Cholesterol	0mg	%		
Sodium	0mg	%		
Total Carbohydrates	0g	%		
Dietary Fiber	0g	%		
Sugar	0g	%		
Protein	0g	%		
Vitamin A	0%		Vitamin C	0%
Calcium	0%		Iron	0%

* Percent Daily Values are based on a 2,000 calorie diet. Your daily value may be higher or lower depending on your calorie intake.

	Calories:	2,000	2,500
Total Fat	Less than	65g	80g
Sat. Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodium	Less than	2400mg	2400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g

Fat	9	Carbohydrate	4	Protein	4
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Technomic Takeaway:

3 Areas of Opportunity for Hospital Breakfast

#1

KNOW YOUR CUSTOMER

There are a number of reasons to dine for breakfast in a hospital. A foodservice consumer could be a patient, staff or visitor. There are even more types of breakfast settings within a hospital, including in-patient dining, cafeterias, restaurants, kiosks or other venue. Knowing what services apply to which consumers is crucial to meeting dining needs at hospitals. In addition, because there is a clear disconnect between what is offered and what is desired on menus at hospitals, hospitals can do more to properly align the menu with what consumers want.



#2

THINK OUTSIDE THE (HOSPITAL) BOX

Hospitals are increasingly considered a foodservice destination with highly skilled chefs, as proven by the multitude of hospitals like Truman Medical Center in Kansas City, Mo., Wexford Health + Wellness Pavilion in Pennsylvania and Boston Children's Hospital that recently offered chef demos, attracting area locals. With this backing, hospitals can appeal to business folks who work or residents who live nearby with enticing upscale options for breakfast.

#3

CONDIMENTS AND SAUCES ARE KEY TO INNOVATION

Most hospitals will not put extra effort into offering entirely new or innovative menus because it can be expensive and the patient turnover is quick. However, that doesn't mean operators can't insert interesting or trendy flavors and ingredients in select fare. This is where condiments and sauces come into play — they can be applied to various types of foods or beverages, they are relatively inexpensive and they can be made in-house or come from a trusted brand.

