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Case Study



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Client
McDonald's Australia

Title
How Macca's made Brekkie the most important meal of the day once again.

Category
B11a. Insight & Strategic Thinking - campaigns $1-5 million

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Q1 Executive Summary & why does this case deserve an award in this category?

This is the story of how Macca's reversed years of share and sales declines, to put Macca's breakfast back on the map for Aussies.

With a more aggressive competitor set bringing breakfast menu innovations, national expansions and heightened media spending, Macca's was losing its stronghold as the leader in Quick Service Restaurant (QSR) breakfast. Off the back of 5 years of promotion-based campaigns alone, they had been pulling on purse strings, not heartstrings when it came to breakfast. The 'Breakfast Comes First' campaign signalled a step change, to once again establish Macca's breakfast as an emotive occasion worthy of a visit.

Diving into first party data, as well as fan to fan conversations and social listening revealed to us that in a universe of Macca's fans, it was clear that for many people, Macca's was first and foremost a breakfast restaurant. As a brand that leans into the lovers, not the haters, our biggest breakfast fans became the inspiration for the campaign, using their fandom to remind Australia of the joy of breakfast at Maccas again.

This campaign is testament to the power of fan led marketing. That celebrating what people love about your brand has immense power, and that creating campaigns designed to entertain them and reflect their lived experiences can have profound impacts on both only brand perceptions, but the business' bottom line too.

The campaign exceeded all campaign objectives, seeing double digit growth across both sales and share growth, all whilst delivering on a whopping **682% ROI.** But most importantly, it re-ignited Aussie's love for a Macca's breakfast, making it feel special once more.

Q2 - What was the strategic communications challenge?

Maccas invented QSR breakfast, with the launch of the McMuffin in 1971

Operator Herb Peterson created the first portable breakfast sandwich featuring a toasted English muffin, Canadian bacon, American cheese, and an egg cooked in a round Teflon ring to fit the muffin. And with this, the QSR breakfast phenomenon was born.

Years later across the seas, Australia launched the first McCafe in 1993 as the first QSR to offer cafe style coffee, with the global rollout following soon after. Since its humble beginnings, Maccas has led the charge in breakfast, creating the template for other brands to follow.

Fast forward to 2022 and both Hungry Jacks and Guzman Y Gomez had begun to challenge our breakfast game.

From 2022 Hungry Jacks had stepped up their breakfast offering, introducing a string of new breakfast items, and rolling out 'Jack's Cafe' as a coffee competitor to our McCafe, reaching national scale in 2023. Meanwhile, GYG began to roll out more 24/7 restaurants amidst pressure to convince investors it could continue its breakneck pace of growth. In doing so, it introduced a coffee and breakfast offering, seeking to steal the tradie and early morning crowd away from Maccas.

See Source 1 - Breakfast Competitor Overview

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In response, their media spend on the breakfast day part significantly ramped up, with HJs spending $6.8 million in media spend on Breakfast alone in 2024, while GYG spent $5.5 million.[1]

This increase in menu innovation and media spend led to rapid growth for both competitors across the breakfast day part, especially Hungry Jack's who saw a +20% increase for HJs 'Is good for breakfast' from 2021 to 2024[2]. And while their share of breakfast remained small, Hungry Jack's managed to increase theirs by +78% from 2022-2024, while GYG increased by +133%[3].

As a result Macca's leadership in QSR breakfast was under threat, with losses in both share and sales.

Unlike many businesses, Macca's saw a boom during COVID, especially through drive thru, as we were seen as a safer alternative and were able to remain open. Yet as restrictions eased and QSR spending rebalanced, we were hit hardest in comparative losses, which were especially stark for a business whose operators put the most value in comparative sales successes year on year.

For breakfast, this was even more pronounced due to the increasingly intense competitive landscape. We saw sharp Breakfast share declines over a two year period of nearly [redacted], leading to a [redacted] in share from 2023 to the start of 2025[4].

REMOVED CONTAINED SENSITIVE INFORMATION

See Source 2 - Macca's CBI Share Analysis 2023-2025

More recently, sales and number of transactions (Macca's class them guest counts) had also begun to take a dive, with an aggressive [redacted] decrease in sales and a [redacted] decrease in guest counts from Q4 2024 to Q1 2025 alone.

It was time to turn the tide in declining share and sales, and establish Macca's as the definitive leader in QSR breakfast once more.

Our Challenge:

Affirm our leadership in a more competitive breakfast landscape than ever before, after years of sales and share declines.

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[1] OMD Spend Analysis 2024
[2] Maccas CBI team Coffee and Breakfast Deep Dive, 2024 Q4
[3] Maccas CBI Share Analysis, 2022-2024.
[4] *Source: Maccas CBI Share Analysis 2023-2025.*
[5] Maccas CBI Sales Analysis 2024-2024
[6] Maccas CBI Guest Counts Analysis 2024-2024
[7] QSR Media Aus 2026

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Q3 - What were your objectives? State specific goals.

All campaign objectives and KPI are set by Macca's Marketing alongside their Consumer Business Intelligence team (CBI), based on robust analysis on what will be deemed a success for the business. As a business that relies on year on year growth for our operators, all targets are based on benchmarks from the same period in the year prior, whilst also factoring in long term trends in growth and declines.

While some of these targets may seem small, in a highly competitive category worth [redacted], they all represent a huge uplift for the business and crucially, a return to positive growth for this crucial day-part.

Objective 1:
Reverse share declines in breakfast to see a [redacted] in breakfast share vs year prior
Following years of significant share losses, a positive turn around was critical for the business. We were tasked with increasing breakfast share by a full [redacted] over the campaign period to help rebuild growth for this crucial day part for the business.

KPI	Target
QSR breakfast share	[redacted]

Objective 2:
Reverse sales declines to increase total breakfast sales by [redacted] vs year prior

A positive uplift for Breakfast sales was important to deliver commercial success in the eyes of our operators, with the task of a [redacted] increase in comparative sales year on year for the breakfast day part.

KPI	Target
Breakfast sales vs year prior	[redacted]

Objective 3:
Increase Guest Counts across the breakfast occasion by [redacted] vs year prior

A positive sales turn around alone was not enough, we were also tasked with increasing the number of breakfast transactions (guest counts) over the campaign period .This is a notoriously hard metric to move given the existing scale of Maccas in Australia. We were given a target +1.55%.

KPI	Target
Breakfast Guest Counts vs year prior	[redacted]

Objective 4:
Increase brand perceptions around taste of breakfast, and the broader breakfast occasion at Macca's verses year prior

Improving breakfast brand metrics were also vital to help future proof our success beyond the campaign period, and re-establish Maccas as the breakfast destination for Aussies. We were tasked with positive uplifts on the scores for the hardest to shift 'top two box' metrics for the total occasion indicator 'Is great for Breakfast', as well as an even higher uplift on 'Has good tasting breakfast food', as taste is a key driver for business growth.

KPI	Target
'Has Good tasting breakfast food'	[redacted]
'Is great for Breakfast'	[redacted]

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Q4 - What was your strategy and how did you get there?

Despite being a nation of Breakfast lovers, it had become public enemy number 1
Aussies are notoriously a nation of early risers, with 59% of us starting our day before 7am[8]. Because of this we are famous for our morning economy with 16% of total day transactions made between 5am-10am, verses only 6% in the UK[9].

And yet, in recent years breakfast has faced more than its fair share of backlash. From avocado on toast being hailed as the reason millennial homeownership is beyond reach, to the rise of intermittent fasting, it felt like breakfast had a target on its back. To the point that we even define ourselves in opposition of it, with people identifying as "not a breakfast person". So despite 42% of Aussies acknowledging that 'Breakfast is the most important meal of the day', 56% of us are often skipping it[10].

This, coupled with the growing cost of living concerns which had made Aussies put discretionary spending on the backburner, saw the whole category in [redacted], with fewer and fewer Aussies getting out of bed for QSR breakfast[11].

And our focus on deals had made it feel even more transactional
At a time when Breakfast itself was valued less and less, Macca's had unintentionally been devaluing it further, with a focus on transactional, deals based breakfast messaging over the past 5 years. As a result, we had commoditised what should have been one of our most celebrated meals of the day, pulling only on purse strings, not heart strings.

Stepping back from this, we realised we had a bigger, more human problem to solve in order to reclaim our breakfast leadership:

<u>The problem behind the problem:</u>
Aussies had forgotten what made a Maccas breakfast so special

To overcome this we required a shift from both the business and the brand. One that would help us stand out from how competitors were speaking about breakfast and reinvigorate the love around the occasion as a whole once more.

> ***FROM:*** *Brekkie as transactional sales opportunity*
> ***TO:*** *Brekkie as an emotive occasion for Macca's to reclaim*

To help us with this emotive unlock, we did what we always do, and spoke to our fans.
In order to show up as a brand that's familiar and approachable, our creative thinking is always anchored around a fan truth; a unique branded insight specific to Macca's and shared between fans – the small moments, memories, and rituals that make Macca's feel so special to Australians.

What we found was that fans of QSR are more likely to say 'breakfast is the most important meal of the day' than non QSR fans[12]. But this was even more true of Maccas Fans. Breakfast at Macca's loomed large in our fan's minds, being a stand out memory for many of them growing up, a nostalgic beacon of joy filled mornings filled with golden hashbrowns and brekkie meals of past.

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See Source 3 - Macca's fans social listening

Digging a little deeper, we discovered that for many fans, breakfast was their favourite meal at Maccas.

Diving into first party data within the MyMacca's app revealed a core Breakfast obsessed audience. Ove[redacted] in our MyMaccas data base had Macca's Breakfast as their main purchase[13]. For these Aussies, it wasn't a Big Mac, a Cheeseburger or even our Nuggets that drove them to the golden arches. Their hearts (and shopping carts) were full of McMuffins, Hashbrowns and McCafe coffees.

We realised was that there are Macca's fans, and then there are Macca's *breakfast fans*

While it was a smaller subsection of our total audience, they were a passionate and powerful audience to acknowledge. In a universe of Macca's fans, it was clear that for some people, Macca's was first and foremost a breakfast restaurant.

REMOVED CONTAINED SENSITIVE INFORMATION

See Source 4 - Digitas MyMaccas First Party Data Analysis

8 Smart Company 2025
9 ibid
10 Australian Food News 2023
11 Maccas CBI Category Analysis 2024
12 Nielsen Clear Decisions QSR fan vs Non QSR fan Analysis, 2025
13 Digitas First Party Data, MyMaccas App

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As a brand that focuses on our lovers, we decided to lean into this brand behaviour even further and celebrate our biggest breakfast fans as an unlock to cue broader breakfast love across Australia.

This led to our fan truth ... "I only come to Macca's for the breakfast" (see Source 5)



Taking this as our foundational insight, we would use our biggest breakfast fans as a beacon, taking their love for it and amplifying it through our campaign to help the rest of Australia fall back in love with a Macca's breakfast again.

Our strategy was clear:

GET Aussies who were no longer getting breakfast at Macca's

TO Remember what makes a Macca's breakfast so special

BY Using Maccas breakfast fans to remind Australia of the joy of breakfast at Maccas again

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Q5 - How was this strategy brought to life?

The Idea: "Brekkie Comes First"

The Macca's brekkie menu is beautiful, but fleeting. Like seeing a double rainbow, a shooting star, or witnessing the salmon run in Alaska. It has caused much joy and much sorrow over decades, even Adam Sandler tapped into the emotion of this occasion in his hit film Big Daddy.

So instead of shying away from how heartbreaking Macca's narrow brekkie window can be, we created a campaign that leant into it, leveraging our biggest breakfast fan's experiences of making or missing the breakfast window.

At the heart of the campaign was a 30 second film titled "Delicious Heartache" - slow-motion storytelling set to the iconic 80's power ballad "It Must Have Been Love" by Roxette. It portrayed the emotional roller coaster of Macca's brekkie - contrasting the two emotional states of Macca's breakfast fans at the end of the brekkie window. The elation of those who made it for a cheesy McMuffin, and the deflation of those who missed out on the Hot Cakes they'd been dreaming about. But the film finishes with a hopeful outtake alongside a smiling Ronald McDonald statue: "Don't cry because you missed Macca's brekkie, smile because you can get it tomorrow".

See Source 6 - TVC Board



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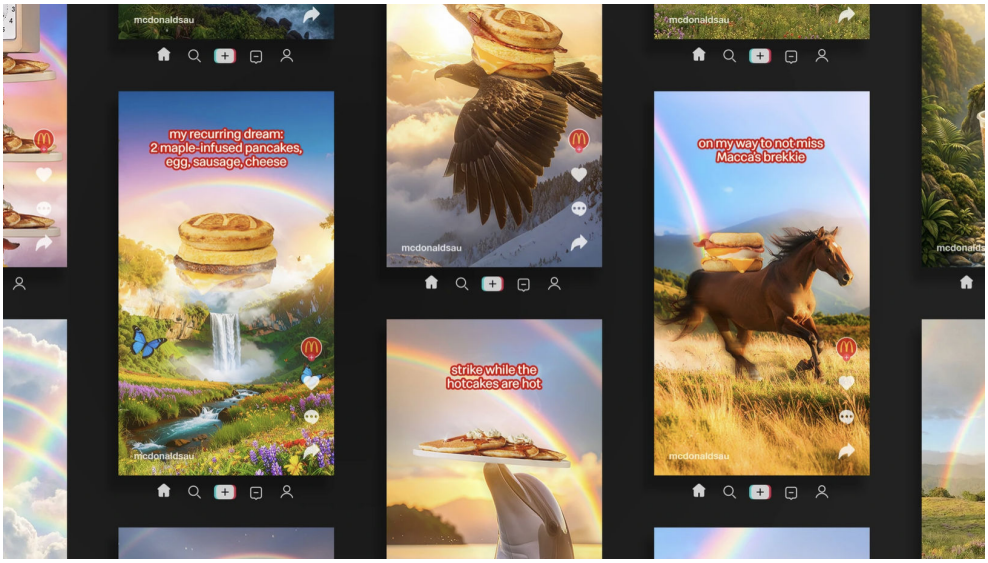
And in Radio and OOH, copy spoke to the importance of not missing out on the brekkie menu.

See Source 7 - Campaign Out Of Home Executions



Then on social, the campaign tapped into this hopeful tone with a series of #hopecore inspired memes – capturing the euphoric moment of actually making the brekkie window. As well as 80s style love song dedications to Macca's tasty breakfast icons.

See Source 8 - Social Executions



Ultimately, by leaning into the emotion around this consumption occasion, we turned the biggest weaknesses about brekkie into a strength that flexed its delicious exclusivity - one that you'll definitely want to set your alarm for. And that make a Macca's breakfast feel special once more.

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Q6 - How do you know your campaign was successful?

The campaign achieved double digit growth across both sales and share, beating all targets set and helping us establish Maccas as a leader in breakfast once more.

Objective 1:
Reverse share declines to see +1 percentage point increase in breakfast share vs year prior

The campaign saw incredible growth in breakfast share, smashing our target with a whopping share increase of 6.2ppts, representing a +28% uplift in share vs the same period the year prior.

With this uplift, the campaign saw our biggest share increase for breakfast for the past 3 years, nearing historic highs from 2022 off the back of COVID growth.

KPI	Target	Result
QSR Breakfast Share	[redacted]	[redacted]

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See Source 9 - Objective 1 Chart

Objective 2:
Reverse sales declines to increase total breakfast sale by [redacted] vs year prior

The campaign became a sales driving engine for the business, seeing the biggest uplifts for any day part over the period of the campaign with a [redacted] increase in breakfast sales versus the year prior.

KPI	Target	
Breakfast sales vs year prior	[redacted]	[redacted]

This figure represents [redacted] in total campaign sales, with McCafe sales the highest they have been in the past 3 years. As well as this, the campaign saw a [redacted] weekly sales peak; the highest in 5 years.

REMOVED CONTAINED SENSITIVE INFORMATION

See Source 10 - Objective 2 Chart

Objective 3:
Increase Guest Counts across the breakfast occasion by [redacted] vs year prior

The campaign also successfully reversed declines in number of transactions (guest counts) above and beyond our targets, with a [redacted] increase in breakfast orders over the campaign period, seeing even more McMuffins, Coffees and Hashbrowns fly off the grill.

KPI	Target	
Breakfast guest counts vs year prior	[redacted]	[redacted]

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See Source 11 - Objective 3 Chart

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Objective 4:
Increase brand perceptions around taste of breakfast, and the broader breakfast occasion at Macca's vs year prior

While commercial success was crucial in the breakfast context, the uplifts to broader brand perceptions around breakfast were crucial to the long term recovery of the day part. The campaign exceeded both brand metric objectives by nearly 5x, creating a solid new base for breakfast love among our fans.

KPI	Target	
'Has Good Tasting Breakfast Food'	[redacted]	[redacted]
'Is great for Breakfast'	[redacted]	[redacted]

REMOVED CONTAINED SENSITIVE INFORMATION

See Source 12 - Objective 4 Chart

[14] *Source: Maccas CBI Share Analysis 2023-2025*

[15] Breakfast PCA 2025,Maccas CB Report

[16] Ibid

[17] Source: HOT Tracker, Module 2, Data period: R12M Dec' 23 - R12M Dec' 25; McDonald's base n = 3878; KFC base n = 1712; Hungry Jack's base n = 1042

[18] Source: Circana / CREST® AU, QE Dec 2025

Q7 - Was the campaign a good investment?

Macca's CBI team has a robust econometrics based model that allows them to isolate impacts based on specific campaigns compared to the total market effects of a campaign. As a result, all profit is directly attributed to the 'Brekkie Comes First' campaign.

The ROI is calculated on a profit based model, not revenue. The total campaign spend accounts for all expenses related to the campaign material, including creative, production and media spend. The ROI is calculated as profit divided by campaign spend.

Macca's sales and profit margin are highly confidential so the figures are indexed from the Incremental Gross Profit.

CAMPAIGN SPEND	CAMPAIGN GROSS PROFIT	RETURN ON INVESTMENT
[redacted]	[redacted]	[redacted]

This ROI also only represents the immediate impact of the 12 week window across the campaign, and does not account for the longer term growth associated with winning back breakfast love among fans in the longer term. Since this campaign's end Breakfast has continued to be in positive growth quarter on quarter and is consistently outpacing all other day parts when it comes to growth[19].

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Q8 - Convince us that the result was not due to other factors.

Wasn't there a new product as part of the campaign?

This campaign did include the introduction of a new breakfast item, the McGriddles. However, this was a campaign related to winning back total breakfast love and growth across the entire breakfast occasion, including all of the iconic Macca's breakfast food and McCafe coffee. While McGriddles did contribute to the overall success of the campaign, the metrics measured are at a total occasion and day part level, with McGriddle unit sales declining post campaign[20], indicating the activity was driving the uplift, not the product alone.

Was it down to category growth, and us riding a tailwind?

No. While QSR overall did experience growth of [redacted] over the campaign period, Macca's rapidly outpaced the category, with [redacted] growth over the quarter, more than triple what the category grew by[21].

Was it down to any other marketing activity?

No. All business results are directly attributable to the campaign, with Macca's' robust econometric modeling isolating the campaign impact from the broader business efforts. In addition, there were no other campaigns or promotional activities in-market around the breakfast day part during this period. As a result, all sales, guest counts and share increases would not have been possible without this campaign in market.

Did we increase media spend?

No, in fact media spend on Breakfast in 2025 vs 2024 was actually down [redacted], due to huge investments in promotion based comms in 2024. This means this campaign actually worked harder on a smaller media budget, proving the business impacts of brand led advertising.

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[19] Maccas BBI Sales Analysis 2025-2026
[20] Maccas CBI Sales Analysis, McGriddles PCA
[21] Maccas CBI QSR Market Analysis 2025
[22] OMD Media Brekkie Spend Analysis 2024 vs 2025

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