

The Full Plate: Canadians' Meal Choices

November 2025

NielsenIQ Omnishopper & PanelViews



Agenda



Unlocking Insights with NIQ Tools

Overview of Food Service and Home Meal Replacement capabilities.



Market Trends Across Meal Solutions

Dollar and trip patterns shaping consumer choices.



Deep Dive: Home Meal Replacement

Key behaviours and opportunities.



Industry Perspective

Guest speaker on HMR and the importance of understanding Food Service.



Understanding Food Service Dynamics

How out-of-home consumption is evolving.

A comprehensive view of *total omni commerce*

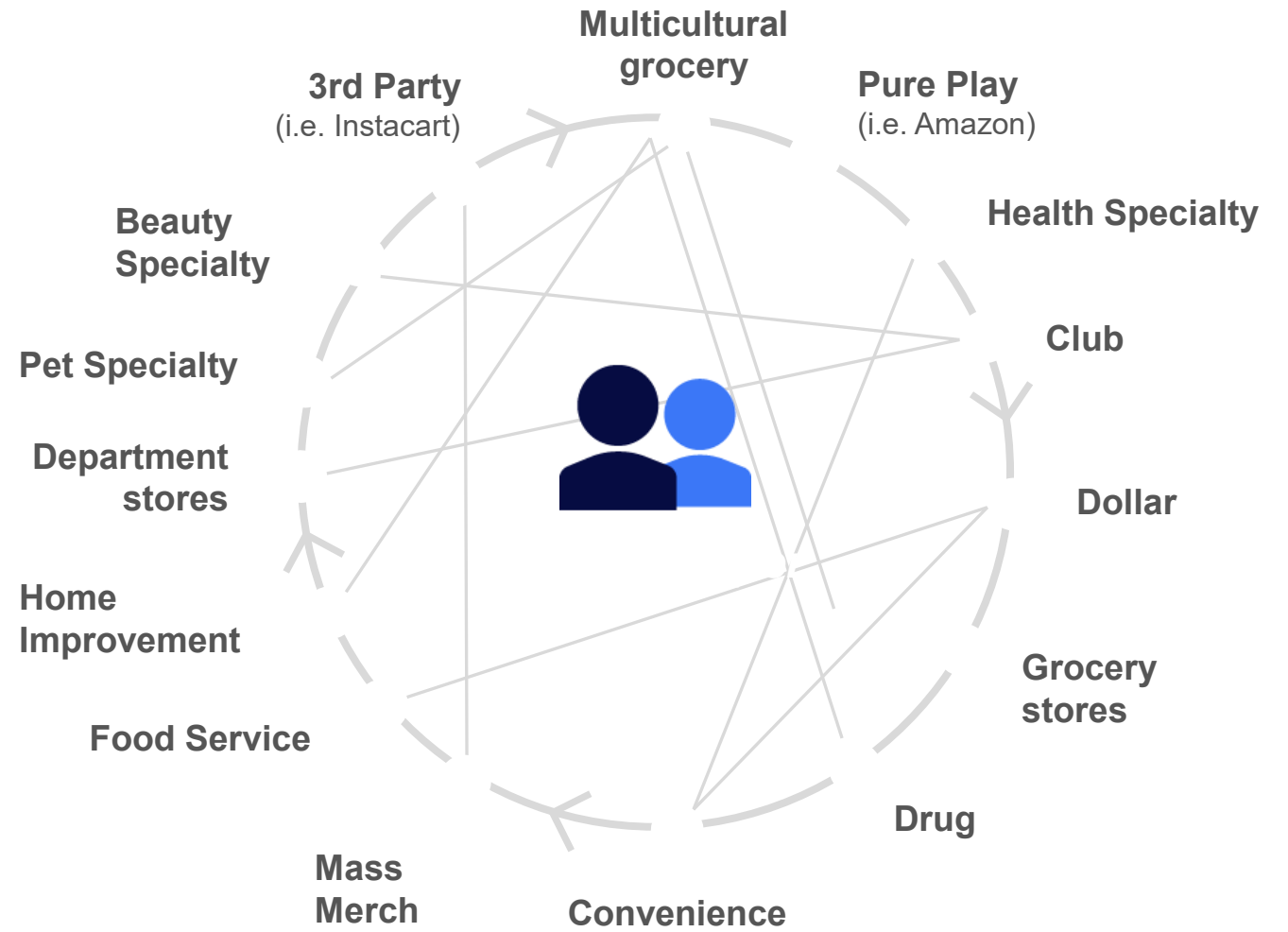
NIQ Omnishopper panel unlocks new visibility to omni shopping behaviour in Canada

An omnishopper panel to complement Homescan insights

- Unlocks incremental consumer behaviour insights via a multi-country Omnishopper roadmap
- Leverages receipt capture technology & NIQ unique assets for better data accuracy and granularity



Measures **~30K** engaged panelists across online and offline channels



The Full View™ of the Total Food Service and Restaurant space

*Identify **growing and shifting** over time across in-home and out-of-home so you can make strategic business decisions with confidence.*

Dig deeper into consumer behaviour and cross-shopping between:



Grocery Retailers



Restaurants



Food Categories



Home Meal Replacements (HMR)



Cuisine Types



Protein Types



Drinks



Food Delivery

Fast Food & Category Focused

"Out of Home" category groupings captured include

- Coffee
- Tea
- Soft drinks
- Bagels
- Sandwiches/Subs
- Burgers
- Chicken
- French fries
- Baked goods (donuts, muffins, cookies)
- Sweet desserts (ice cream)
- Breakfast (breakfast sandwiches with eggs)
- Mexican fast food
- Pizza
- Pasta
- Salads
- Soup
- Sushi



Key Retailers

Use this level of segmentation to uncover where consumers are gravitating or who is driving the most dollars

- Beverage retailer
- Casual dining breakfast
- Casual dining corporate chain
- Casual dining independent
- Fast food burgers
- Fast food chicken
- Fast food Mexican
- Fast food other
- Fast food pizza
- Fast food sandwiches
- Fast food treats



Retailers with receipt item coding

- Chatime (in store)
- Starbucks (in store)
- Tim Hortons (in store)
- Boston Pizza (in store)
- Swiss Chalet (in store)
- A&W (in store)
- Dairy Queen (in store)
- Harveys (in store)
- McDonalds (in store)
- McDonalds (online)
- Wendys (in store)
- KFC (in store)
- KFC (online)
- Mary Browns Famous Chicken (in store)
- Popeyes Restaurant (in store)
- Taco Bell (in store)
- Dominos (in store)
- Pizza Hut (in store)
- Pizza Hut (online)
- Pizza Pizza (in store)
- Pizza Pizza (online)
- Subway(in store)
- Subway (online)

+ 100 other retailers we measure at the Total Receipt level



Survey & Segmentation: understanding consumer groups using surveys and purchase behavior



1 Identifying the why behind the buy

Link known purchasing behavior with attitudes to uncover the motivations for purchase behavior, **even among those unaware of their own actions**



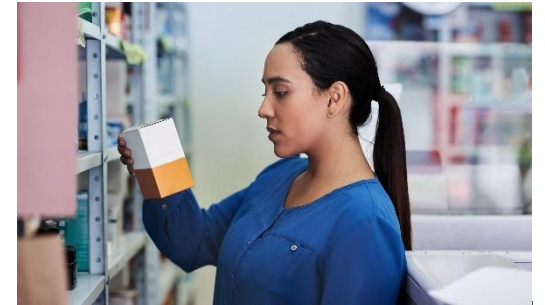
2 Quantify attitudinal impact on behavior

Uncover how the way consumers think impacts the bottom line, providing the ability to understand the **volumetric impact of attitudes**



3 Behavior based segmentation

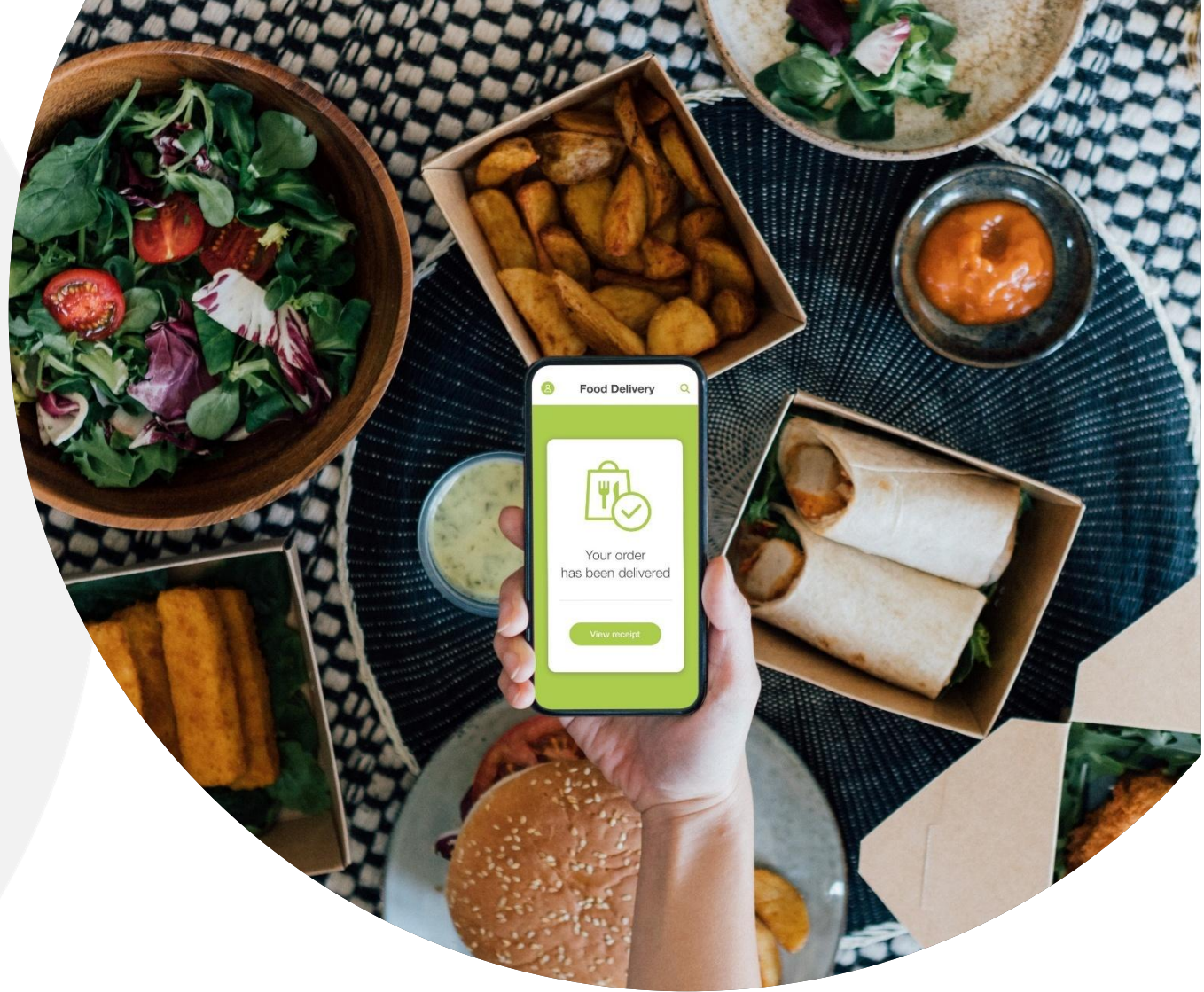
Identify patterns to prioritize and focus investments by grouping like consumers / shoppers together based on **confirmed purchase behavior**



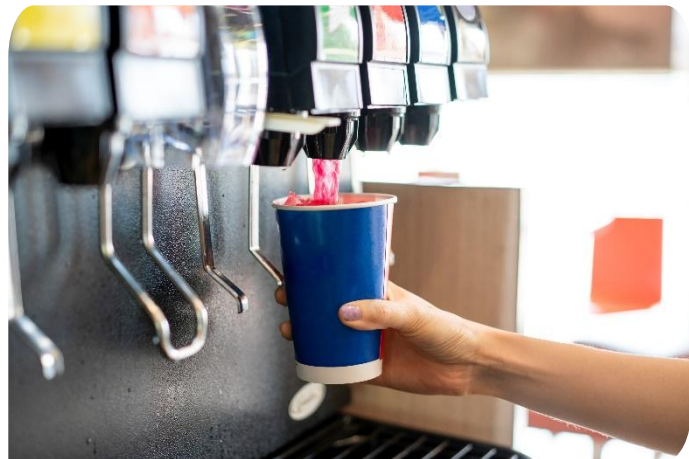
4 Long term buyer value

Find target shoppers that have higher lifetime value; understand to what extent category entry point indicates long term value & if attribute purchase patterns indicate habit formation and increased category value

**Where are
consumers filling
their meal time
needs?**



Canadians are spending more on groceries and dining out



Food Service Banners

Canadian households spend an average of \$605 annually at restaurants — a **3%** increase year-over-year. They dine out **33 times** per year, up by 2 trips.



Dining Out Participation

- 84% of Canadians have dined out in the last 6 months
- Among diners, over half go out 1–3 times per month

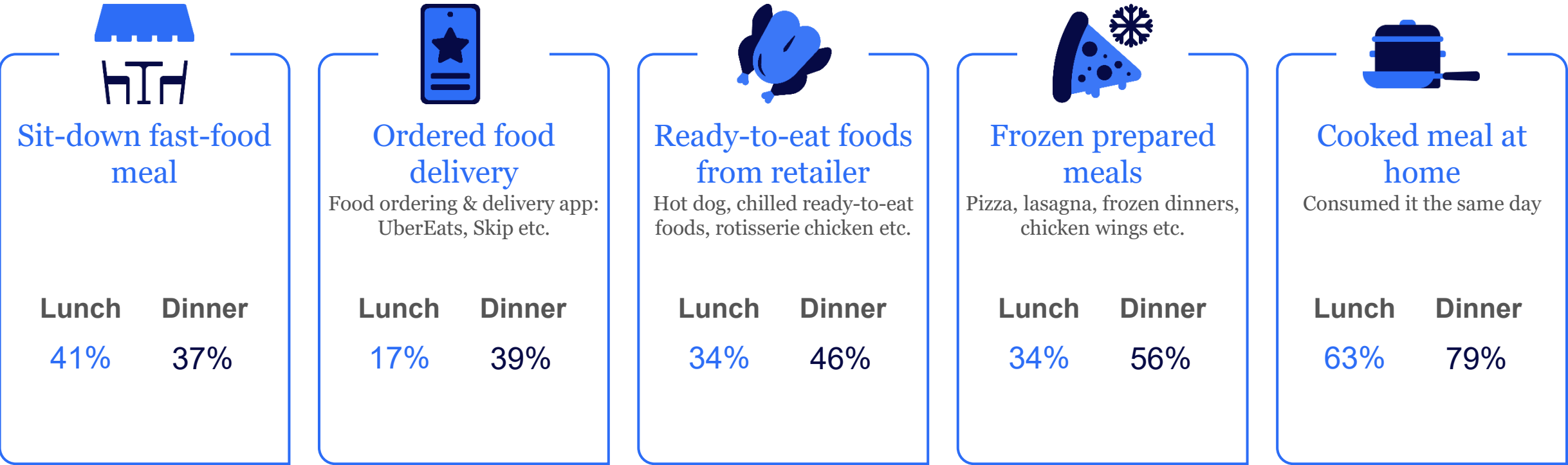


Total Food

Canadian households spend an average of \$5,269 annually on groceries, a **3%** increase compared to last year. They make approximately **160 grocery trips** per year, up by 1 trip.

Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025 vs. YA;
Home Meal Replacement - Syndicated Study, May 2025; Q30. Have you/your family visited a restaurant (fast food or full service)/ dined out in the last 6 months? | Base: Total respondents, n=4985

Canadians have plenty of lunch & dinner options



Source: Home Meal Replacement - Syndicated Study, May 2025 (Omnishopper Panel)
Q3. 3. In the past 12 months, which of the following meal type(s) were applicable to you/your household for lunches and dinners?

From Fresh to Fast, Canadians embrace a mix of meal solutions

Convenience drives spend in Food Delivery with 20% of Canadians ordering in more often



Fast Food Out of Home

Penetration:
90%

Value per Buyer:
\$304 (+3%)

Occasions per Buyer:
31 (+2)

Food Delivery Service Out of Home

Penetration:
20%

Value per Buyer:
\$711 (+14%)

Occasions per Buyer:
27 (+4)

HMR

Penetration:
92%

Value per Buyer:
\$141 (+4%)

Occasions per Buyer:
13 (+0.1)

Food: Frozen

Penetration:
99%

Value per Buyer:
\$613 (0%)

Occasions per Buyer:
42 (-0.1)

Food: Perishables

Penetration:
100%

Value per Buyer:
\$3,282 (+4%)

Occasions per Buyer:
131 (+0.5)

Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025 vs. YA
HMR: Sushi, Fresh Pizza, Salads, Sandwiches, Filled Rolls, Wraps; Cooked & Cured Chicken

Deep Dive: Home Meal Replacement



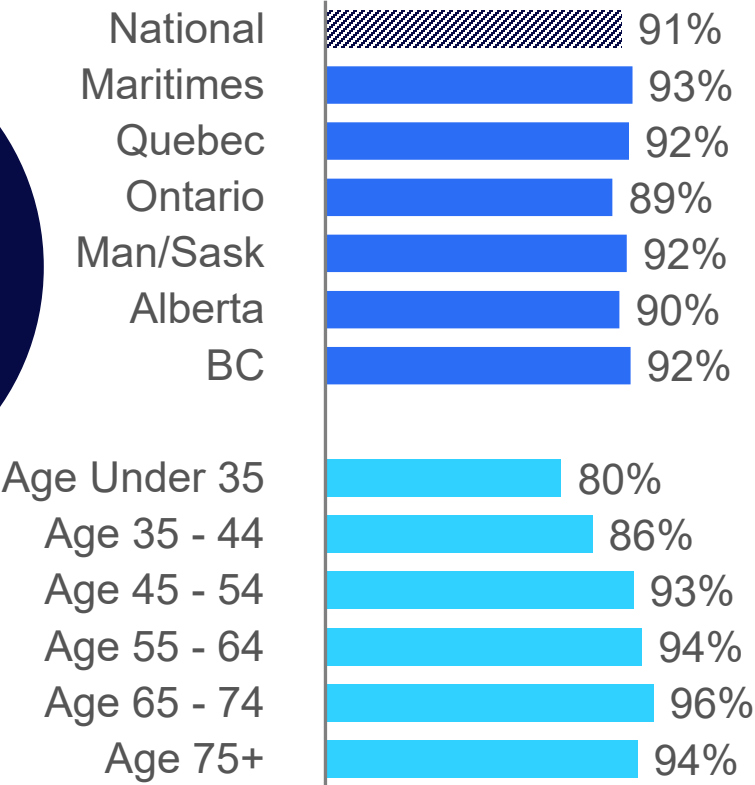
92%

of Canadian
households
purchased **HMR**
in the past year

Younger Canadians are buying less HMR

Penetration levels – Total HMR
2025 (Canada)

21%
of Canadians are
buying more
meal items that
are easy to
prepare or
convenient to
consume

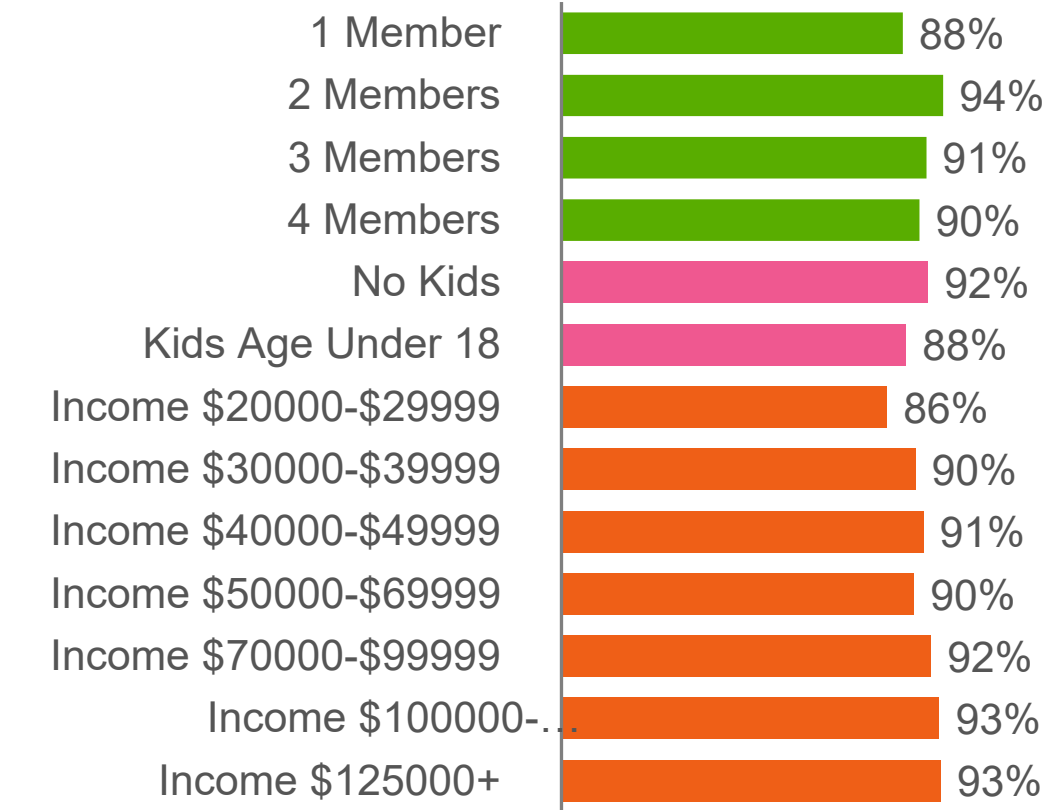


Source: NielsenIQ Homescan, TOTAL OUTLETS, TOTAL CPS SALES - BMO-TOTAL OUTLETS - HOME MEAL REPLACEMENT - Latest 52 Weeks - WE Jun 14 25



Penetration levels are similar across households

Penetration levels – **Total HMR**
2025 (Canada)



Source: NielsenIQ Homescan, TOTAL OUTLETS, TOTAL CPS SALES - BMO-TOTAL OUTLETS - HOME MEAL REPLACEMENT - Latest 52 Weeks - WE Jun 14 25



58%

of Canadians who
have purchased
HMR in stores in
the past year
bought it for
lunch

87%

of Canadians who
have purchased
HMR in stores in the
past year bought it
for **dinner**

Source: NIQ Canada, Home Meal Replacement Trend Syndicated Report 2025

Canadians' purchasing pattern of buying HRM has reached a 'plateau' after years of growth

Consumer dynamics – **Total HMR**
2025 (Canada)

	% chg \$	% chg
\$ per HHLD	\$213	+2%
Units per HHLD	22.9	-4,0%
Occasions per HHLD	14.3	--
\$ per occasion	\$14.30	--



Source: NielsenIQ Homescan, TOTAL OUTLETS, TOTAL CPS SALES - BMO-TOTAL OUTLETS - HOME MEAL REPLACEMENT - Latest 52 Weeks - WE Jun 14 25



Clients are looking for options in the deli counter – and next to it, where more and more brands and items are offered to Canadian consumers

Ready-to-eat (deli counter)



Ready-to-serve



Home-meal-replacement (HMR) sales continue to grow in Canada

HMR is a \$3.7B business in this country

HMR Performance Canada

	% chg \$	chg units
Grocery	4,1%	0,3%
Produce	3,5%	2,8%
Meat & Seafood	5,3%	1,0%
Bakery	0,5%	(0,5)%
Deli	2,7%	2,9%

Source: NielsenIQ MarkeTrack, Total All Channels Canada, 52 weeks ending Oct. 18, 2025

All HMR categories have grown vs last year

	% chg \$	chg units
Deli	2,7%	2,9%
Home Meal Replacement	3,1%	2,3%
Natural Cheese	4,1%	3,4%
Deli Meat	(2,0)%	13,8%

Total HMR	% chg \$	% chg EQ
Refrig / Deli Entrees	3,1%	2,3%
Deli Meals	1,9%	1,1%
Prepared / Deli Salads	5,6%	6,6%
Prepackaged Sandwiches	0,2%	0,0%
Cooked Chicken	3,7%	0,1%
Sushi / Specialty Japanese Food	2,4%	0,1%
Refrig / Deli Pizza	8,2%	5,8%

Grocers are investing more in the ready-made meal category as consumers balance their desire for convenience with a pullback in discretionary spending. “... A lot of consumers now are realizing that you can go to a grocery store and get something that's prepared, and typically it is cheaper (than restaurant food) ...”

Carman Allison, NIQ

Canadian retailers are following the trend!



Maxi launches Jonathan Garnier meal solutions

Maxi has partnered with chef Jonathan Garnier for a line of ready-made meals under \$20, including fresh and frozen items such as butter chicken, cabbage rolls, beef bourguignon, and mashed potatoes



Metro partners with Martin Juneau in Québec

Chef Martin Juneau is now exclusive culinary partner for Metro stores' ready-to-eat, ready-to-serve meal solutions, working with the retailer to develop a gourmet line that elevate in-store dining experiences



Fortino's expanding Pane Fresco's offer

Pane Fresco's is offering more meal solutions under its "Eating Well Made Easy" motto focuses on providing fresh, convenient meals for busy shoppers.



IGA broadens ready-to-eat offers with Chez Lionel

Chez Lionel's gourmet ready-to-eat meals, crafted by Chef Frédéric Dufort, are now available in IGA stores across Québec, offering shoppers a taste of brasserie-style cuisine at home

Source: CONSUMERS' GROWING APPETITE FOR HMRS - Grocery Business Magazine

American retailers
are picking up on
the trend and
growing their
assortment

Inside the store: Wegmans' foodservice paradise in Manhattan

The grocer's first Manhattan location, which devotes nearly an entire floor to meal solutions and sports three dozen self-checkout kiosks, has all of the trappings of a full-scale supermarket.

Published Jan. 24, 2024

Catherine Douglas Moran
Editor

in f X P M G



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FMI: Shoppers are increasingly picking grocery prepared foods over restaurants

Share of consumers choosing deli foods over restaurants more than doubles since 2017, according to new report from industry association

These 10 grocery stores have the best prepared food options in the country

Satisfy your appetite and taste buds

Ready-Made Meals Resonating Among Shoppers: Report

YouGov research shows more consumers seeking prepared foods and using air fryers

Lynn Petrak 1/15/2025

Why grocery stores are starting to look like quick-service restaurants

Grocers are embracing convenience

Q

SN Supermarket News

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Harris Teeter jumps on convenience trend, launches HT Traders Ready Made Meals line

The new line includes individual and family-sized entrees as well as side dishes

Chloe Riley, Executive Editor, Supermarket News
September 19, 2024

1 Min Read

industry influencer

Technomic

Grocers continue to gain ground on restaurants, FMI survey finds

Twenty-eight percent of shoppers in a survey the trade group conducted said they buy deli-prepared foods from grocers as a replacement for going to a restaurant, up from 12% in 2017.

Published Oct. 9, 2025

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A Sprouts employee restocks the grocer's Heat & Eat meal offerings. Part of the grocer's prepared food offerings, the meal options display is situated near the store's deli counter. Peyton Bigora/Grocery Dive

Source: <https://www.grocerydive.com/news/inside-the-store-wegmans-foodservice-manhattan-retail-grocery-food-supermarket/704860>, <https://www.supermarketnews.com/prepared-foods/hellofresh-adds-larger-family-meals-quick-items-for-kids>, <https://www.supermarketnews.com/foodservice-retail/why-grocery-stores-are-starting-to-look-like-quick-service-restaurants>, <https://www.supermarketnews.com/prepared-foods/fmi-shoppers-are-increasingly-picking-grocery-prepared-foods-over-restaurants>, <https://10best.usatoday.com/awards/best-grocery-store-prepared-food/>, <https://www.goodmorningamerica.com/food/story/top-grocery-store-thanksgiving-meals-115105622>

Grocerant are still a thing in the United States

Grocerants, hybrids “...of grocery store and restaurant ... offer(ing) freshly prepared, ready-to-eat, or ready-to-heat foods inside a store setting... “⁽¹⁾ were the big thing in 2019; they are now making a big comeback in the USA

The Supermarket Trend You Should Look For On Your Next Grocery Run

BY SEAN PAGNOTTI
MAY 24, 2025 9:40 AM EST



February 13, 2025

The Evolution of the Grocerant: How Grocery Stores Are Redefining Dining

Share    

Why Is a Grocerant a Smart Investment?

So, why should you start a grocerant? Consider these factors:

1. Convenience for the Modern Consumer

Today's consumers are busier than ever, which means they're looking for convenient ways to shop and dine. Grocerants cater to this need by offering a one-stop-shop experience, where customers can pick up groceries, grab a meal, or even enjoy a sit-down dining experience — without having to visit multiple locations.

2. Increased Foot Traffic and Sales

“From grocerants to fashion cafes – The Gen Z food trends reshaping design”

DALZIEL & POW'S ELLE ASHBY EXPLAINS HOW BRAND AND RETAIL DESIGNERS ARE RESPONDING TO GEN Z'S FOODIE CULTURES, RESHAPING BRANDS, SPACES AND EXPERIENCES IN THE PROCESS.

Elle Ashby

OPINION



PHOTO BY GERALDINE LEWA ON UNSPLASH

SEPTEMBER 18, 2024

Are Grocerants the Future of Supermarkets?



Amid rising regulatory pressures and a surge in theft, U.S. grocery chains are navigating a tough market in 2024. Consumers are tightening their spending, and grocery issues are getting political as inflation has increased food prices.

Source: [The Supermarket Trend You Should Look For On Your Next Grocery Run](#), [The Shifting Landscape of Grocery Retail: Four Key Trends - The Food Institute](#) What Is a Grocerant? The Latest Food Retail Trend, “From grocerants to fashion cafes – The Gen Z food trends reshaping design” - [Design Week, 2025](#) [Grocery Trends & Consumer Behavior - Placer.ai](#), [The Evolution of the Grocerant: How Grocery Stores Are Redefining Dining](#)

A few probing examples of retailers investing to grow food service options in their stores

Order up! How grocers are replicating the restaurant experience in retail

As the gap widens between grocery and restaurant prices, food retailers see an opportunity to turn up the heat on their made-to-order meals to lure cost-conscious consumers.

Published Oct. 30, 2023

Kroger to roll out 'deli of the future' in

GROCERY DIVE Deep Dive Opinion Library Events Press Releases Topics ▾

The 6,500-square-foot prepared food section will feature an open kitchen and offer items "inspired by restaurants and the classic neighborhood deli," the grocer said.

Published Sept. 8, 2025

More than a Store: What it's like to sip and shop at Giant Food's bar

A recent boozy outing to a store the grocer runs in Washington, D.C., led to a slower

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Published Sept. 25, 2025

 **Catherine Douglas Moran**
Editor

in f X P M G



Sprouts to open 20 in-store cafes across Southern California

The specialty grocer is growing its partnership with Klatch Coffee as it continues to expand its footprint and operations.

Published Sept. 26, 2025

Harris Teeter adds big renovations — even a bar — to woo Lowcountry shoppers

BY JENNY PETERSON JPETERSON@POSTANDCOURIER.COM
Aug. 25, 2025



How one grocer is succeeding with in-

GROCERY DIVE Deep Dive Opinion Library Events Press Releases Topics ▾

While many retailers have struggled to make money with on-site eateries, Town & Country Market's integrated approach is lifting sales throughout the store.

Published June 23, 2025

 **Jeff Wells**
Lead Editor

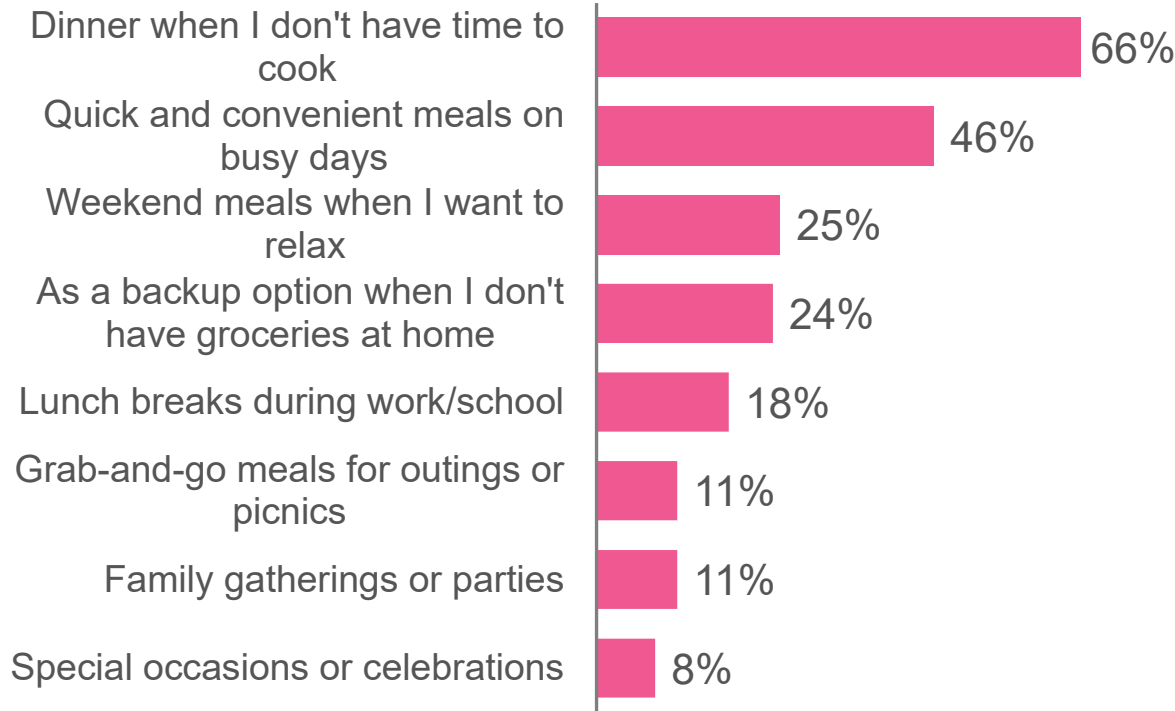
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Source [Kroger to roll out 'deli of the future' in new Kentucky store | Grocery Dive](#), [More than a Store: What it's like to sip and shop at Giant Food's bar | Grocery Dive](#), [Harris Teeter adds The Tavern an in-store bar attraction.](#), <https://www.grocerydive.com/news/grocers-in-store-restaurants-town-and-country-field-house/751221/>, <https://www.grocerydive.com/news/grocers-replicating-restaurant-experience-meals/698112/>, [Sprouts to open 20 in-store cafes across Southern California | Grocery Dive](#)

Convenience & busy lifestyle remain the main drivers for HMR in Canada

Consumption occasions for HMR 2025 (Canada)



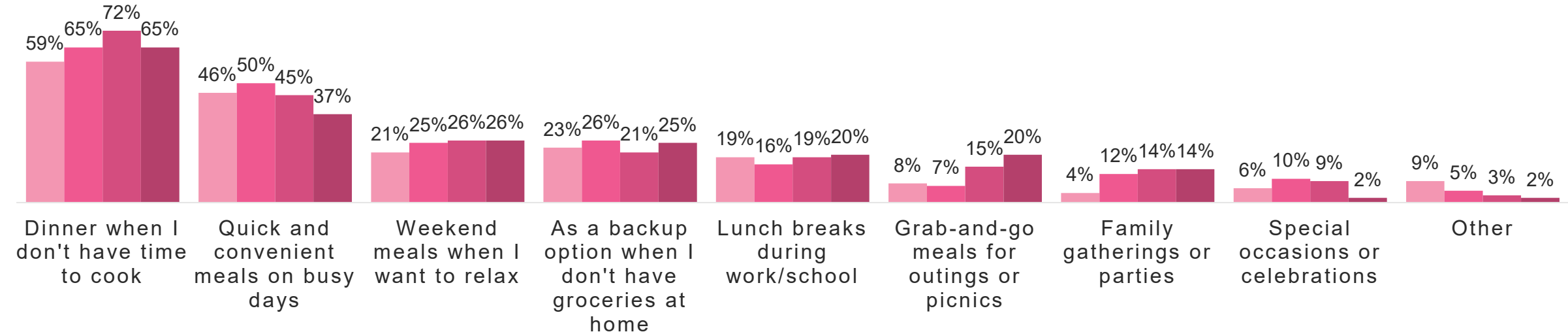
Source: NIQ Canada, Home Meal Replacement Trend Syndicated Report 2025



Bigger households are looking for solutions when going out with the kids (ie. soccer game!)

Consumption occasions for HMR
2025 (Canada)

1 member 2 members 3/4 members 5+ members



Source: NIQ Canada, Home Meal Replacement Trend Syndicated Report 2025

There's an opportunity for retailers and brands to do a better job of pairing items to HMR

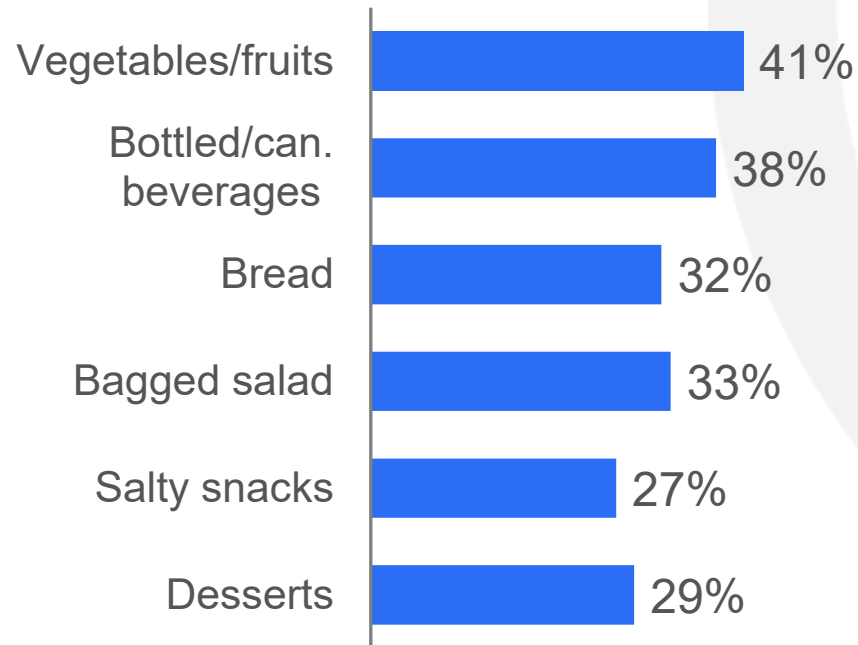
15% of non-buyers say they would buy HMR if retailers would bundle everything in a complete meal

Items purchased with HMR meals at retailers
2025 (Canada)

43%

of HMR buyers
purchased
additional items
to add to their
HMR meal

Items added



Source: NIQ Canada, Home Meal Replacement Trend Syndicated Report 2025

57% of Canadians are not buying more HMR because it's too expensive ...

54% say they would buy them if they were more affordable, while 46% are hoping for promotions

26%

of Canadians are looking for more **variety**, incl. ethnic options

25%

of Canadians are looking for **healthier options**, incl. diet-specific

21%

of Canadians would buy more if retailers offered **fresher/higher-quality**

*Retailers and brands have an opportunity to attract new consumers to HMR by offering **HEALTHIER** and more **VARIETY** in the deli counter of Canadian stores*

Understanding Food Service Dynamics

McDonald's and Tim Hortons top the list of most visited restaurants

Top 15 Food Banners

Total Trip

	Occasions Rank	Spend per Shopper	Value per Trip	Trips per Shopper
McDonalds	1	\$197	\$14	15
Tim Hortons	2	\$139	\$11	13
Subway	3	\$91	\$20	5
Starbucks	4	\$83	\$17	5
A&W	5	\$65	\$20	3
Dairy Queen	6	\$74	\$20	4
Wendys	7	\$70	\$17	4
KFC	8	\$80	\$28	3
Harveys	9	\$77	\$24	3
Popeyes Restaurant	10	\$78	\$26	3
Boston Pizza	11	\$159	\$61	3
Dominos	12	\$92	\$30	3
Pizza Pizza	13	\$76	\$25	3
Swiss Chalet	14	\$132	\$43	3
Taco Bell	15	\$59	\$20	3

Source: Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025



Coffee purchasers are the most frequent Fast-Food visitors

Top 5 Out of Home Beverages
Fast Food

	Occasions Rank	Value % Chg Rank	Shr of Occ.	Penetration	Occ. per Buyer
SOFT DRINKS	1	5	21%	65%	9
COFFEE - REGULAR	2	2	18%	46%	11
COFFEE - SPECIALITY	3	3	9%	39%	6
ICED COFFEE	4	1	5%	25%	6
JUICE	5	4	4%	30%	4

Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025



Beef burgers and breakfast wraps & sandwiches among top Fast-Food picks

French fries' high frequency driven by inclusion in combo meals

Top 5 Out of Home Food

Fast Food

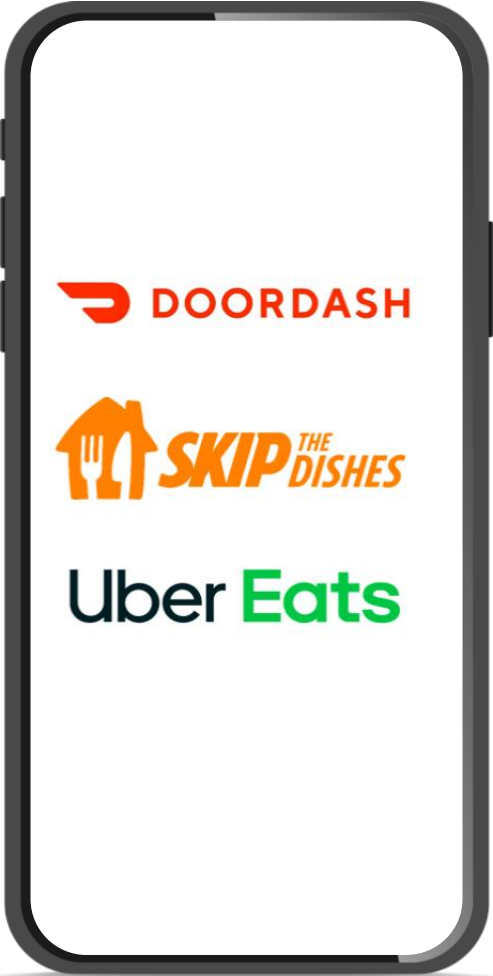
	Occasions Rank	Value % Chg Rank	Share of Occ.	Penetration	Occ. per Buyer
FRENCH FRIES	1	5	23%	71%	9
BURGER - BEEF	2	4	11%	55%	6
BREAKFAST - SANDWICH/WRAP	3	2	9%	42%	6
CHICKEN - BURGER/SANDWICH	4	3	8%	48%	5
BAGELS/BREAD PRODUCTS	5	1	8%	37%	6

Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025

Chicken, french fries, and sandwiches & subs top food delivery orders

Top 10 Out of Home Food
Food Delivery Service

	Occasions Rank	Value % Chg Rank	Share of Occ.	Penetration	Occ. per Buyer	Value per Buyer
CHICKEN	1	5	19%	12%	8	\$151
FRENCH FRIES	2	6	16%	10%	8	\$51*
SANDWICH/SUB	3	2	10%	9%	6	\$106
BURGERS	4	1	10%	8%	7	\$104
SWEET DESSERTS	5	9	10%	8%	6	\$68
BREAKFAST	6	4	9%	7%	7	\$97
PIZZA	7	3	8%	9%	5	\$125
BAKED GOODS	8	8	7%	6%	6	\$39
BAGELS/BREAD PRODUCTS	9	7	5%	6%	4	\$32
SALAD	10	10	5%	6%	4	\$45

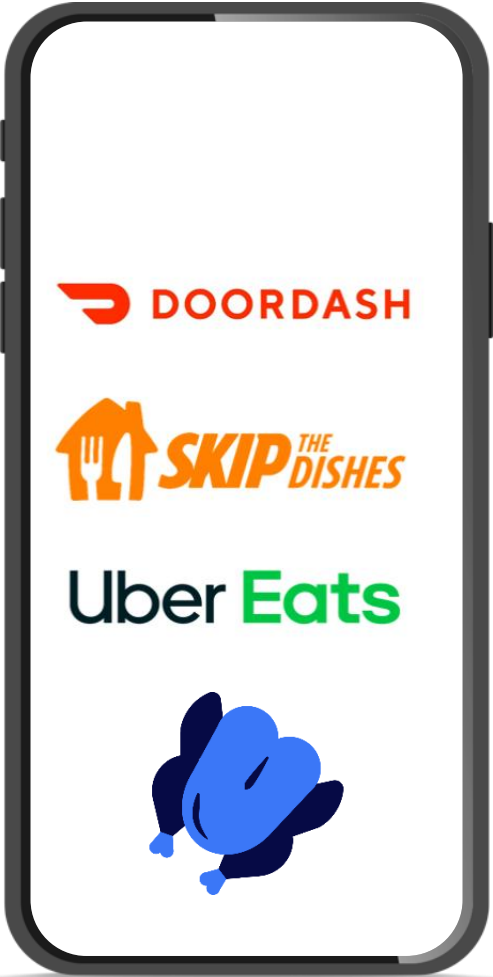


Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025
* The main entrée captures most of the value when purchased in a combo

Nuggets and strips lead chicken orders in frequency on food delivery apps

Out of Home Chicken Food Delivery Service

	Occasions Rank	Value % Chg Rank	Share of Occ.	Penetration	Occ. per Buyer	Value per Buyer
NUGGETS/STRIPS	1	1	4%	4%	6	\$84
BURGER/SANDWICH	2	4	4%	5%	4	\$64
WINGS	3	3	3%	4%	3	\$69
PIECES	4	5	1%	2%	3	\$70
BOWLS	5	2	1%	1%	3	\$60



Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025

One Consumer, Many Touchpoints

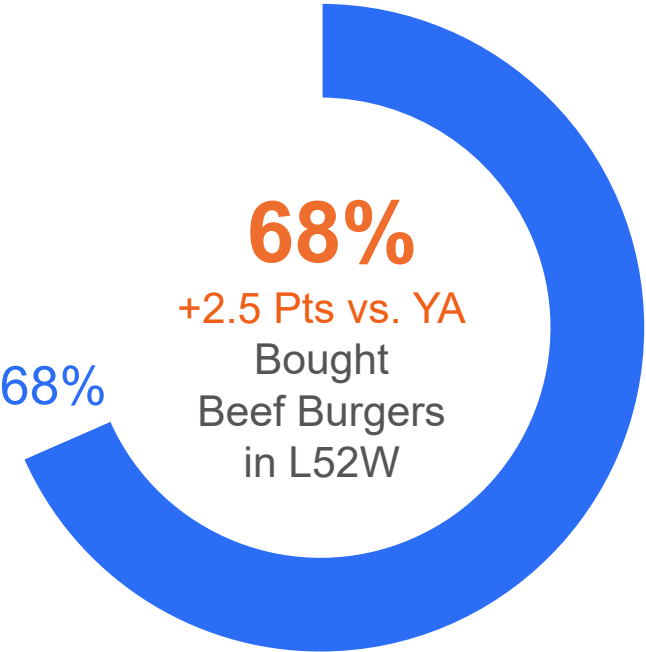
Beef Burger and Coffee Purchases
Across Channels



Beef Burger penetration is growing, driven by Fast Food retailers

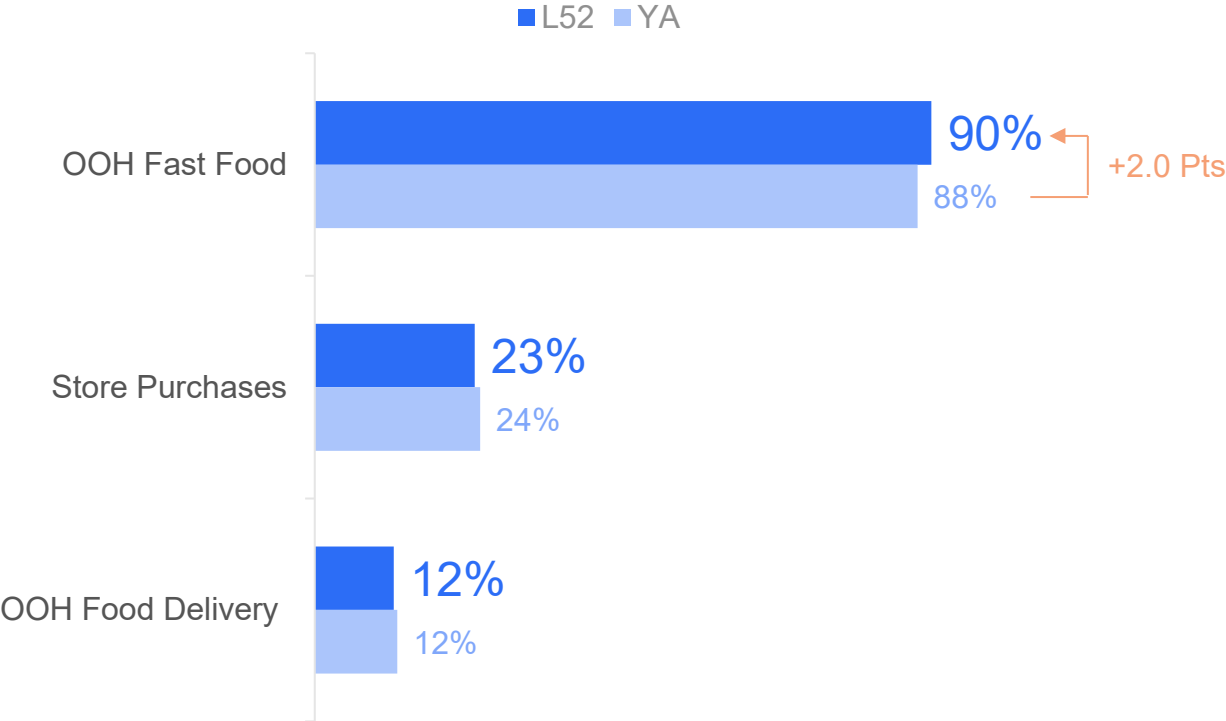
68% of Canadian Hhlds purchased Beef Burgers

Beef Burgers Penetration



9 in 10 Beef Burger buyers purchase them in Fast Food retailers

% Buyers purchasing Beef Burgers in



Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025

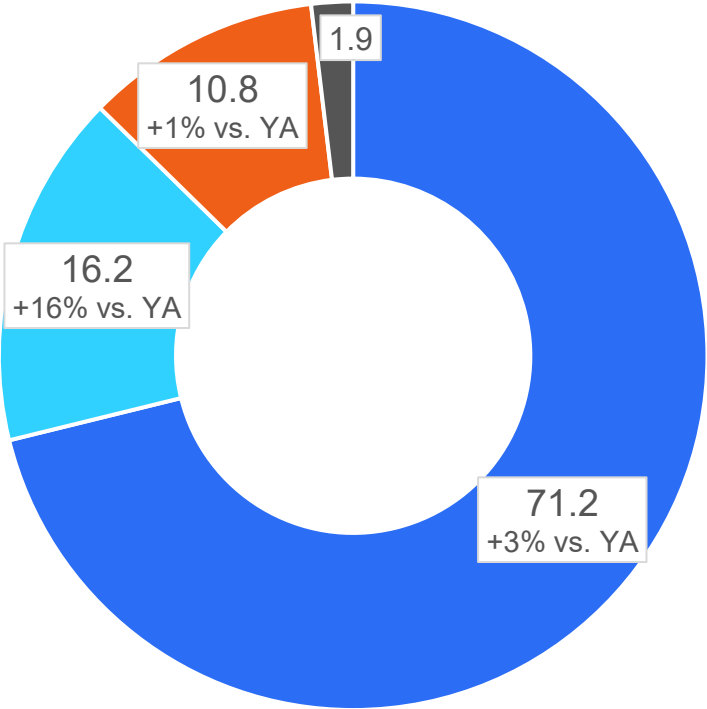
Beef Burgers OOH
Food Delivery growth
dynamic highlights the
importance of strong
channel sales strategy

+3%

Beef Burgers \$ sales grew +6% vs. YA, with OOH Food Delivery
outpacing other channels

Beef Burgers \$ Share (\$ % Chg vs. YA)

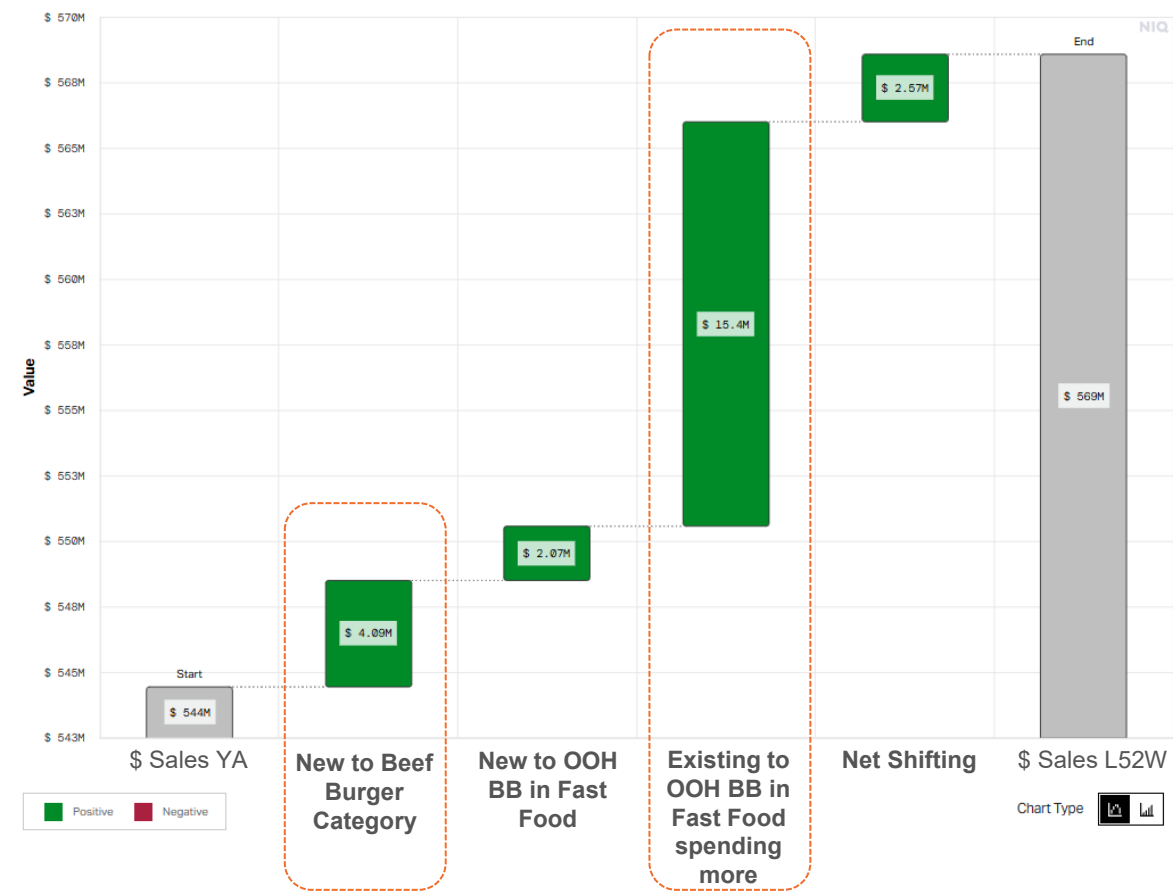
OOH Fast Food OOH Food Delivery Store Beef Burgers OOH All Other



Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025

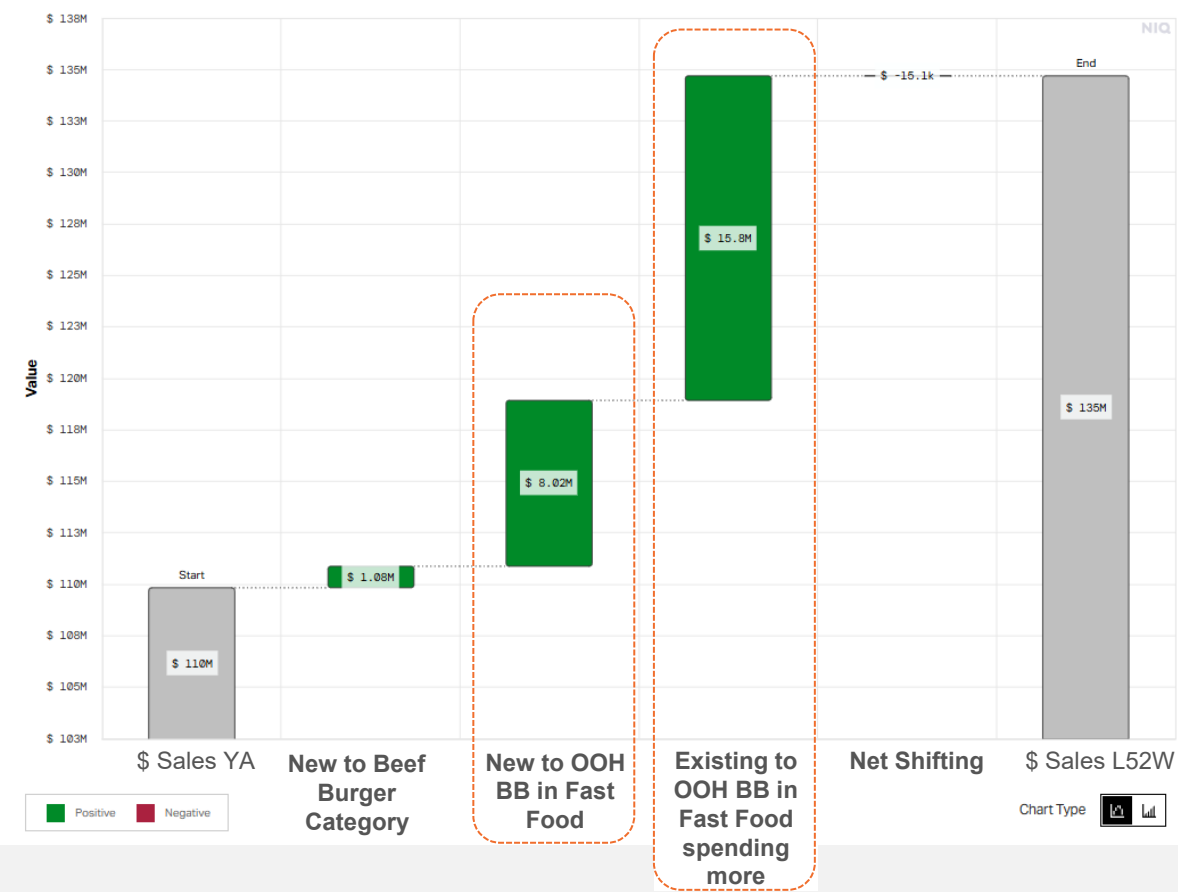
Fast Food Beef Burger \$ gains source from more Canadians entering the burger category and existing fast-food buyers spending more

Source of \$ Growth for OOH Beef Burgers in Fast Food Retailers



Beef Burger Delivery \$ growth is driven by existing burger buyers trying Beef burger delivery and existing delivery buyers spending more

Source of \$ Growth for OOH Beef Burgers in Food Delivery



Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025

Demographics of Beef Burger Buyers

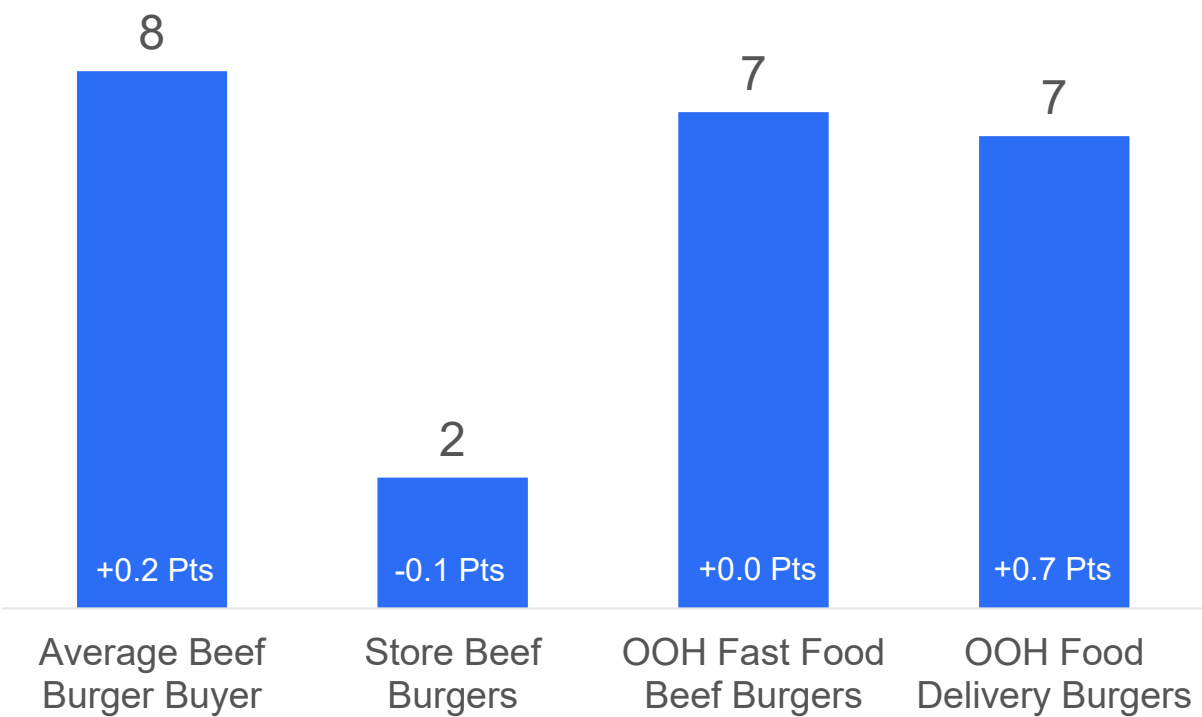
Demographic profiles of OOH Delivery vs. Store Beef Burger buyers differ from those purchasing in Fast Food retailers

Demographic (Buyer Index vs. Total Panel)	Fast Food Beef Burgers OOH	Food Delivery Service Beef Burgers OOH	Store Beef Burgers
HHL Size			
Hhage 18/24	72	163	36
Hhage 25/34	76	182	55
Hhage 35/44	95	162	89
Hhage 45/54	108	108	116
Hhage 55+	108	43	117
HHL Income			
under \$40k	91	82	79
\$40-\$49k	105	74	92
\$50-\$69k	102	80	89
\$70k-\$99k	101	100	105
\$100k+	102	120	112
HHL Size			
1 Member	90	102	65
2 Members	103	88	104
3 Members	104	101	114
4 Members	105	114	131
5+ Members	106	117	118
Presence of Kids			
Kids Under 18 y.o.	106	119	122
Ethnicity			
White	107	95	114
Chinese	92	81	60
South Asian	51	105	37
Black	85	137	78
Filipino	114	131	66
Presence in Canada			
Born in Canada	106	102	109
Born outside of Canada	81	94	73

Consumers are engaging more often when beef burgers offerings are convenient and ready-to-eat

Beef Burgers are purchased in Food Service every other month, compared to twice a year for store products

Occasions per Buyer



Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025

Over half of Beef Burger fast food trips are likely to be meal pack purchases which include fries and beverage

Purchased on an average OOH Beef Burger Trip	% Occasions	Rank on a Beef Burger Occasion	Rank on Avg OOH Occasion
OUT OF HOME BURGER	100%	1	6
OUT OF HOME FRENCH FRIES	66%	2	2
OUT OF HOME SOFT DRINKS	47%	3	3
OUT OF HOME CHICKEN	28%	4	4
OUT OF HOME OTHER DRINKS	15%	5	8
OUT OF HOME COFFEE	9%	6	1
OUT OF HOME OTHER SNACKS	9%	7	13
OUT OF HOME SWEET DESSERTS	8%	8	10
OUT OF HOME JUICE	8%	9	14
OUT OF HOME SANDWICH/SUB	5%	10	7
OUT OF HOME BAKED GOODS	3%	11	5
OUT OF HOME TEA	2%	12	12
OUT OF HOME TOYS	2%	13	20
OUT OF HOME BEER	2%	14	21
OUT OF HOME BREAKFAST	2%	15	9
OUT OF HOME WATER	1%	16	19
OUT OF HOME SALAD	1%	17	18

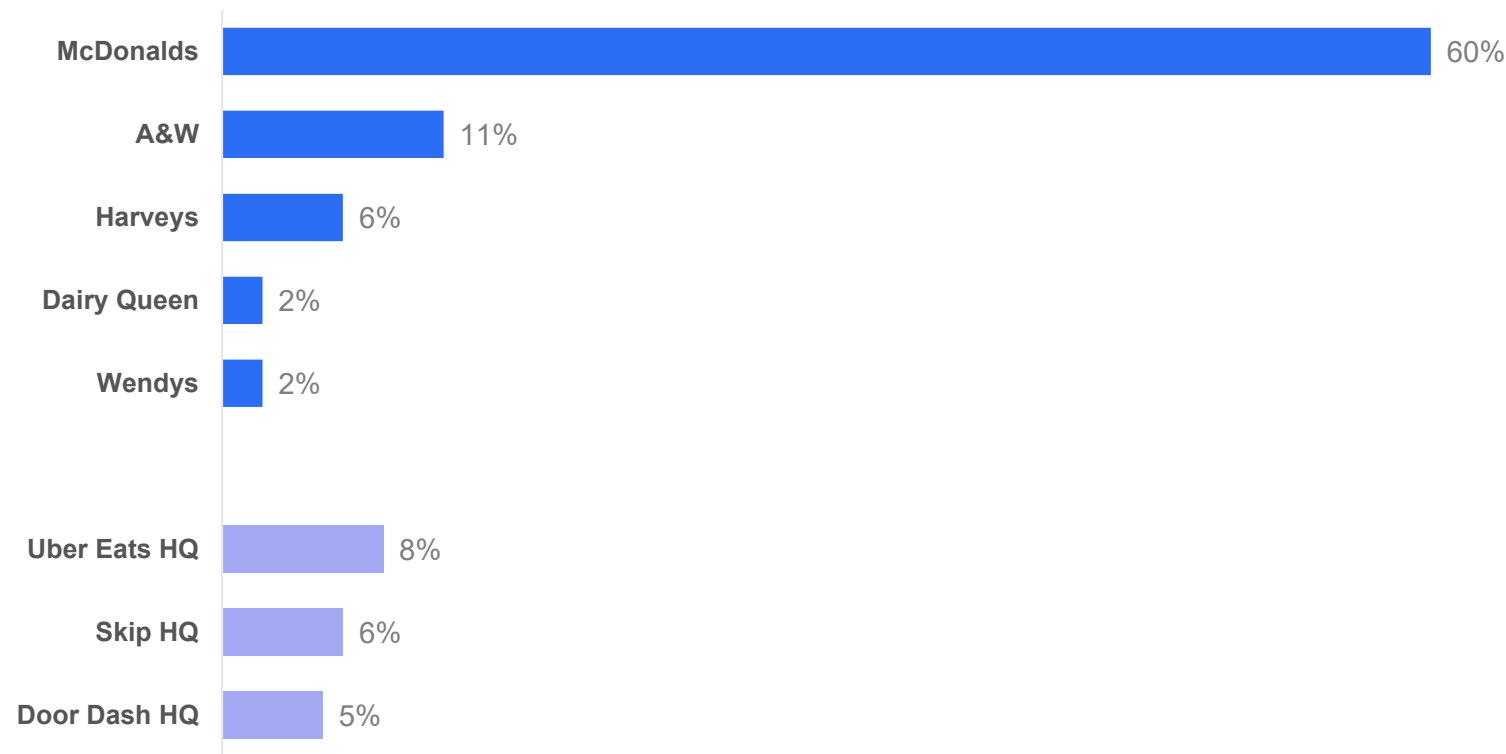
16% of OOH Fast Food trips include a Beef Burger

Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025

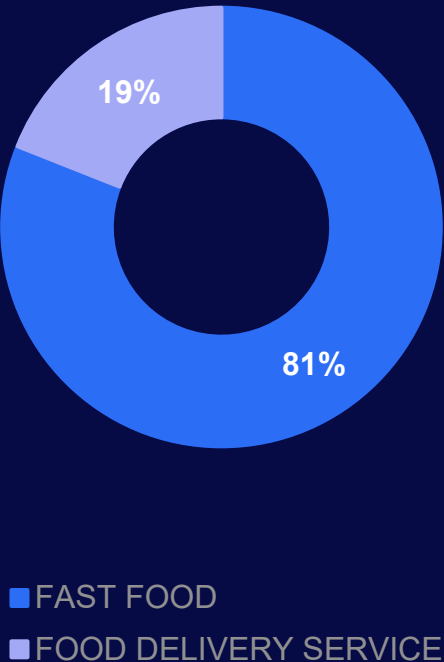
Beef burger trade in Canada: Fast-Food vs. Food Delivery

Burgers – Beef

Dollar Share of Trade (Canada)



Total Canada



Source: Source: NielsenIQ Omnishopper, Total Canada, Shared to: Fast Food & Food Delivery Service, L52W PE September 6, 2025

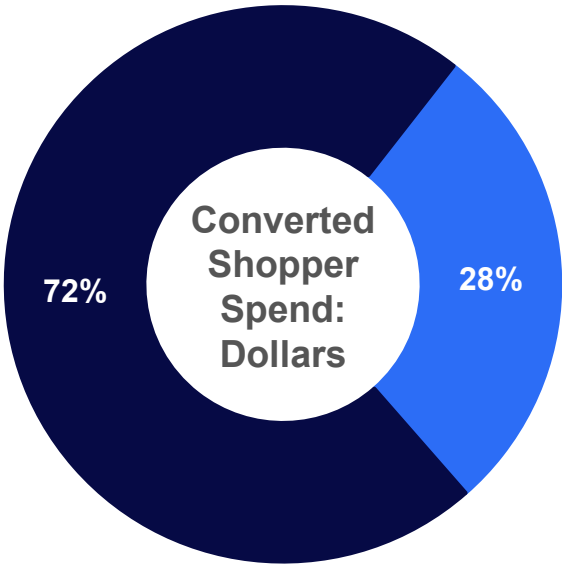
McDonald's captures 72% of beef burger sales among converted shoppers

Almost one-third of the leaked sales are lost to Food Delivery competition; McDonald's captured 9% via Food Delivery

Converted Shopper

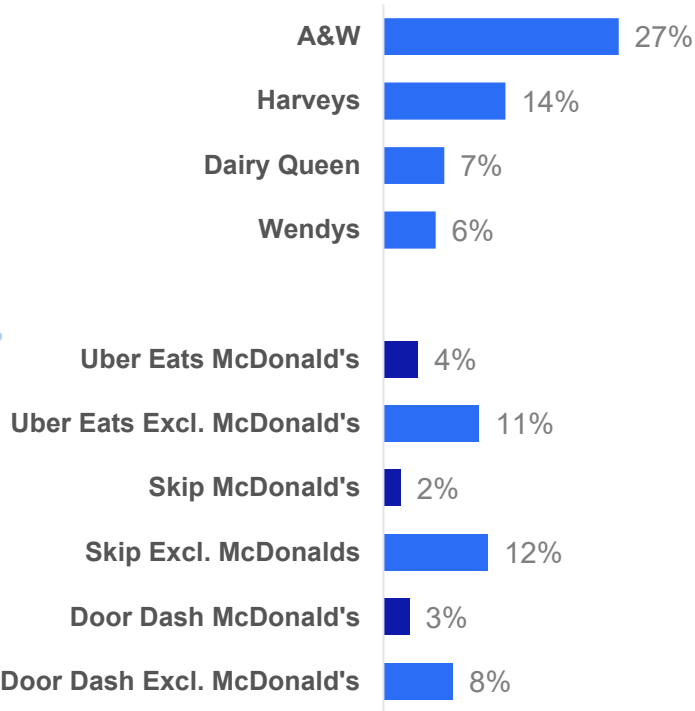
84%

Buyers:
Shop at McDonalds and buys Beef Burgers in McDonald's



■ Other Retailers ■ McDonald's

Leaked Value from Converted Shopper

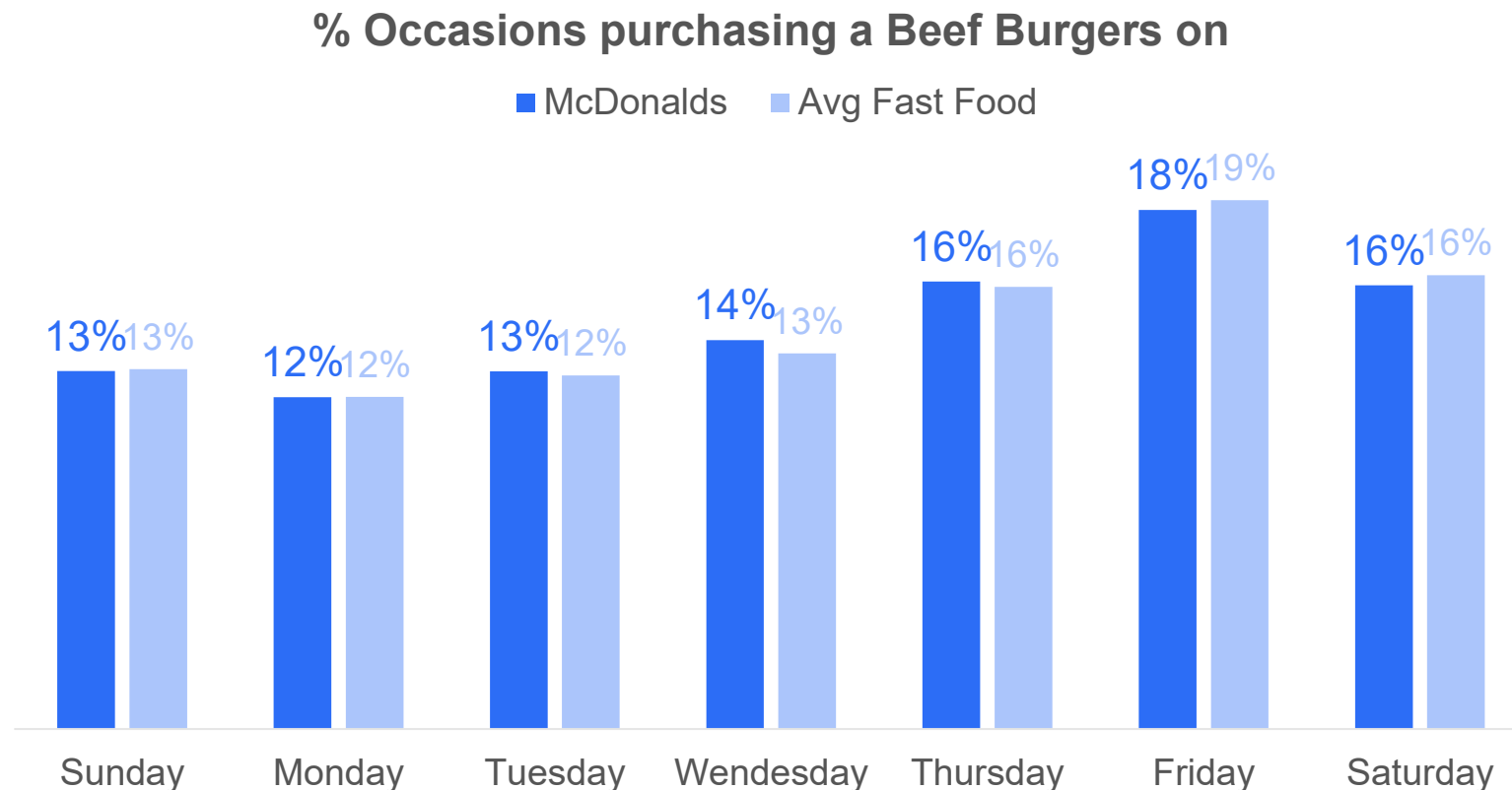


Source: Source: NielsenIQ Omnishopper, Total Canada, McDonald's Shopper and buys Beef Burgers in McDonald's, Out of Home Beef Burgers, L52W PE September 6, 2025

Leverage end-of-week peak demand to maximize sales and engagement



Fridays are the busiest days of the week for Beef Burger purchases at McDonald's



Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025

Over half of Beef Burger trips to McDonalds are likely meal pack purchases which include fries and beverage

Purchased on an average OOH Beef Burger Trip to McDonald's	% Occasions	Rank on Beef Burger Trip to McDonalds	Rank on Avg McDonalds trip
OUT OF HOME BURGER	100%	1	4
OUT OF HOME FRENCH FRIES	75%	2	1
OUT OF HOME SOFT DRINKS	54%	3	3
OUT OF HOME CHICKEN	32%	4	5
OUT OF HOME COFFEE	12%	5	2
OUT OF HOME JUICE	10%	6	8
OUT OF HOME SWEET DESSERTS	10%	7	7
OUT OF HOME SANDWICH/SUB	5%	8	10
OUT OF HOME TEA	3%	9	11
OUT OF HOME TOYS	3%	10	14
OUT OF HOME BAKED GOODS	2%	11	9
OUT OF HOME WATER	2%	12	12
OUT OF HOME BREAKFAST	1%	13	6

27% of OOH Fast-Food trips to McDonald's include a Beef Burger vs. 16% of an average Fast-Food trip

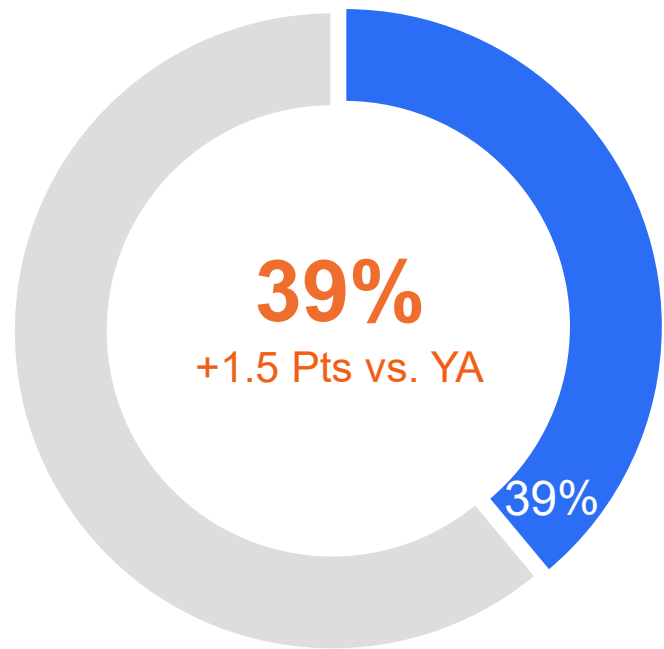


Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025

McDonalds OOH coffee penetration is growing, and an increasing number of those buyers also purchase McCafé-branded coffee when grocery shopping

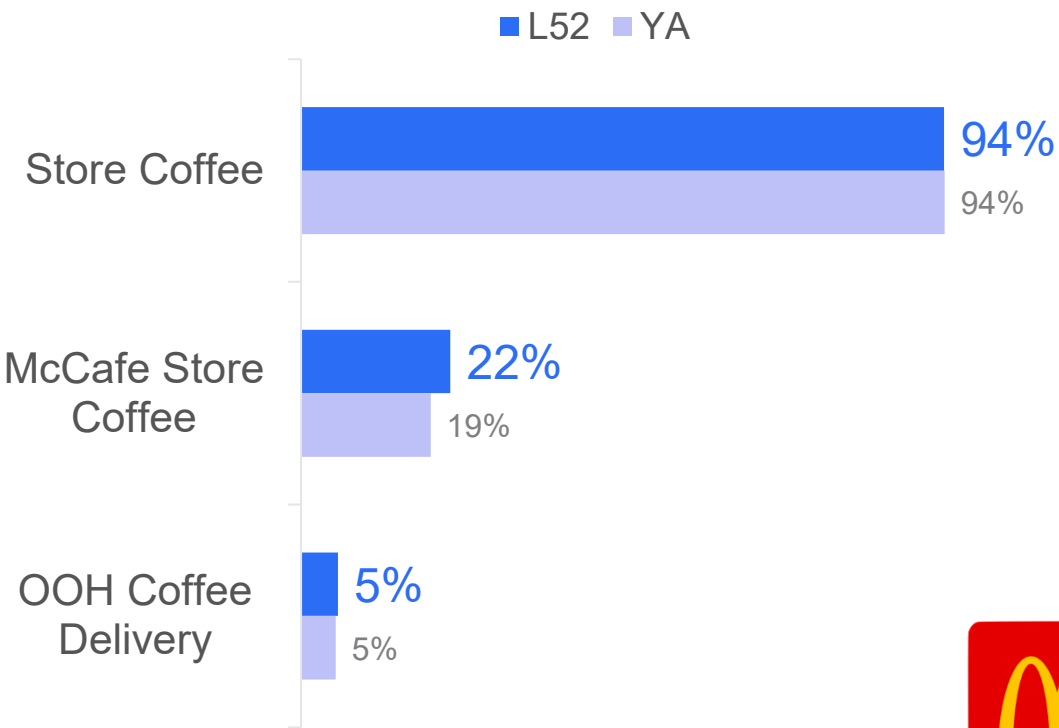
39% of Canadian Hhlds purchased McDonald's OOH in L52W

McDonald's OOH Coffee Penetration



22% of McDonalds OOH Coffee buyers also purchase McCafé store coffee offerings

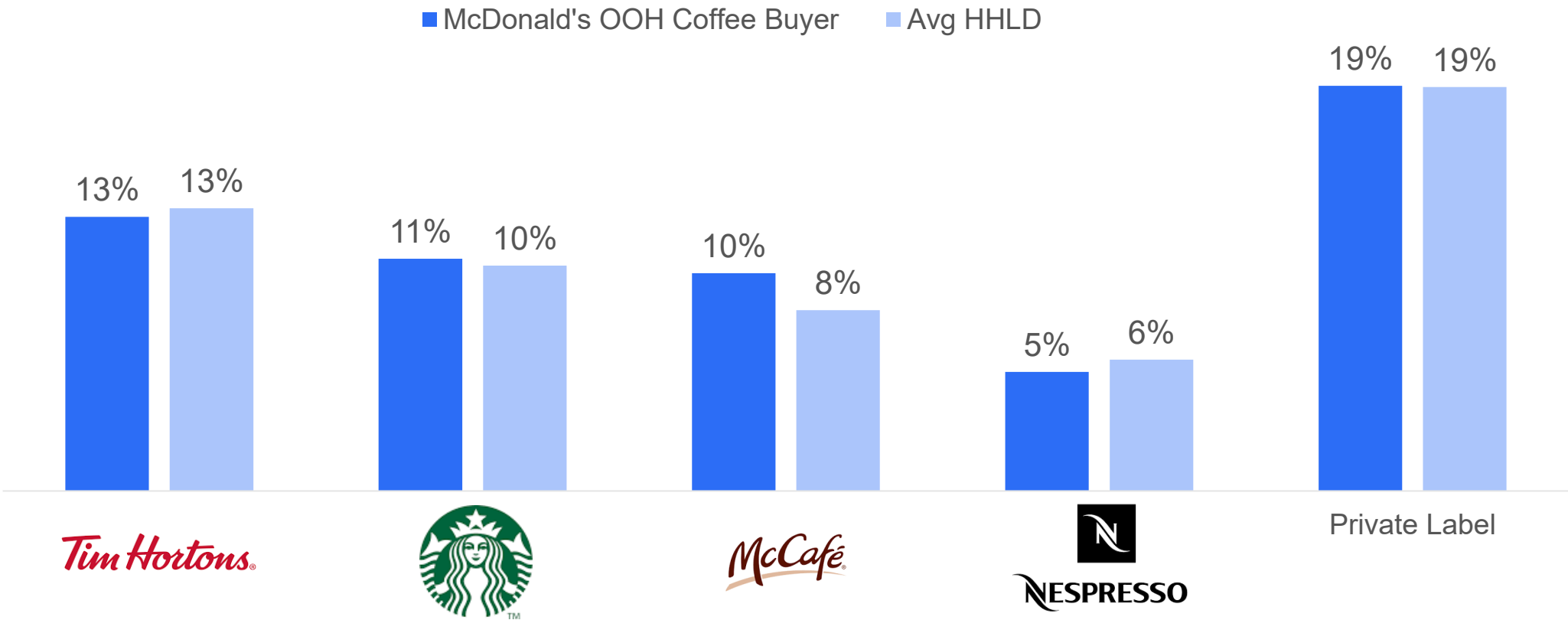
% McDonald's OOH Coffee Buyers purchasing



Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025

McCafé benefits from McDonald's brand loyalty - yet majority of store coffee spend among McDonald's OOH coffee buyers goes to other leading brands

\$ Share of Store Coffee brands among McDonald's OOH Coffee Buyers



Source: NielsenIQ Omnishopper, Total Canada, L52W PE September 6, 2025, 100% Product Share universe = FMCG COFFEE/COFFEE SUBSTITUTES



What's next?



The Full Plate: Canadians' Meal Choices

Observed Trends



Support Canadians balancing in-home and out-of-home consumption

- **84% of Canadians** have dined out in the last 6 months
- **\$5,269** annual grocery spend (+3% YoY) vs. **\$605** at restaurants (+3% YoY)
- **160 grocery trips** vs. **33 dining occasions** per year
- **Demographics shape channel preferences:** OOH Food Delivery buyers skew younger (18–34), are more affluent, families with kids, and from non-white households



Capture Growth in Fast-Food and OOH Delivery Channels

- **Convenience channels are driving growth**
- **OOH Fast-Food** penetration: 90%, \$304 per buyer (+3%) with 31 occasions per buyer (+2)
- **OHH Food Delivery** penetration: 20% of households; \$711 per buyer (+14%) with 27 occasions per buyer (+4)
- **Coffee, french-fries, chicken, and burgers** are among top drivers of fast-food visits and OOH food delivery choices



Drive Cross-Channel Engagement

- Tailor product offerings to the **demographic profiles and unique needs** of different channels shoppers including HMR, In-store, Fast Food, or Food Delivery
- Leverage fast-food brand **loyalty** to boost retail and food delivery sales
- Innovate for **Frequency of purchase** across channels
- Optimize menu and promotions

Purchase frequency

The insights you crave

Share of stomach

Food segments

Demographics

Cross Shopping

Answer critical business questions

Cross Shopping

- How are consumers shifting between restaurants and retailers?
- How are they shifting between purchasing HMR and Tim Hortons?
- Are consumers exclusive or do they shop both?

Food segments

- What is the overlap of market share between delivery platforms, grocery stores, restaurants, HMR?

Purchase frequency

- How often are specific demographic groups ordering meals online?
Going to restaurants?

Share of stomach

- Which meal delivery services are my target consumers spending with, and what types of foods are they ordering?
- What other restaurants are winning?
- What types of food have the biggest share and are growing the most?
- Where are consumers spending their weekly meal dollars?

Demographics

- Is this McDonalds consumer different from the one who goes to Booster Juice?



Coming *into view*

