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Case Study



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Agencies
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Client
Dan Murphy's

Title
How having an Eye for Value kept Dan Murphy's on top in a race to the bottom

Category
A01. Retail

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Q1. EXECUTIVE SUMMARY & WHY DOES THIS CASE DESERVE AN AWARD?

It's easy to win on price when you have a guarantee you'll beat anyone. But it's not the 1950s anymore, Dan.

When inflation expectations hit their highest since 2010, and Aussies, battered by pricing tactics worthy of a royal commission, had been trained to hate paying full price - winning on value stopped being rational. It became emotional. A matter of pride. The validation of beating the system. Australians didn't just want the lowest price; they wanted the win, and the wine with the medal to prove it.

[redacted]

Price has long been treated as a bottom-of-funnel footnote, a final nudge at the moment of decision, an insurance policy against apples-to-apples comparison. This campaign turned the funnel upside down. Dan's had the weaponry: an Everyday Lowest Liquor Pricing model backed by a guarantee that didn't just meet competitors, it beat them. Honourable intent, transparently backed up. The opportunity was to make that philosophy feel as iconic as the man behind it.

Dan Murphy famously said: *"I beat all my competitors every month, every week, every day, every hour, on every price, on every product, on every bottle."* So the campaign took his most recognisable asset and let it do the talking. No prices. No promotions. No fine print. Just Dan locking eyes with Australia, communicating something beyond words: *I've already done the maths. You won't find better.*

[redacted]

In a race to the bottom, Dan Murphy's won by refusing to enter it.

[redacted]

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Q2. WHAT WAS THE STRATEGIC COMMUNICATIONS CHALLENGE?

Enter 2024. A new era for Dan's - Nobody beats us for price, range & service
Dan's had launched a brand campaign in 2024 boasting 'Nobody Beats', across a unique trilogy of attributes: The largest range in a vast warehouse setting, sold with the expertise and passion of your corner liquor store, at everyday low prices. It delivered perfectly to post-Covid prosperity [redacted]

A new era for sobriety...
Occasions were narrowing as hump-day drinks hit a speed hump, and customers swapped out their usual spritz for matcha and run clubs. Sober-curiosity was hitting record highs, with 44% wanting to consume less or stop drinking[1](1) with per-capita alcohol dropping to its lowest level in 50 years by 2024[2](2). [redacted]

And a Cost-of-Living permacrisis
After years of inflation and rising interest rates, Australians entered 2025 with budgets constricted, shopping behaviour more deliberate, and price re-emerged as the dominant decision driver. 80% of Aussies were concerned about cost-of-living with 73% more focused on value-for-money[3](3)

Meaning increased price competition... at scale
A changed competitive environment added a degree of difficult [redacted]

Price distrust & unprecedented scrutiny
Noise around price meant customers were turning to trusted sources to decode, fueled by AI, the ever-improving low-price vigilante: 56% of AI users specifically using these tools to compare prices and 38% for real-time price tracking and deal alerts.[4](4) Trust in price claims had never been lower. Years of inflated retail prices, constant promotions, and inconsistent discounting led consumers to assume there was always a catch.

This all culminated in shopper scrutiny, materialising into a **senate inquiry into supermarket pricing practices** that sapped credibility across large retailers and their value claims. Trust, once lost, becomes infinitely harder to regain[5](5 [redacted]

[redacted]

Importantly, customers didn't just want *lower prices* they wanted confidence they weren't being taken advantage of. This created demand for greater price transparency and proof, not just deals.

[redacted]

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Price leadership could no longer be assumed, or simply claimed. Dan's needed to make its value legible again and

- Rebuild **price trust**, not just price awareness
- Reassert leadership without fuelling a race to the bottom
- Shift from *promotional persuasion* to *price authority*

SOURCES:

(1) *The Daily Aus, Newsletter, Why more Aussies are drinking less*
(2) *McCrindle, Alcohol consumption at lowest level in 50 years*
(3) *Ernst & Young, Australia, The Future Consumer Index, 2024*
(4) *insideretail.com.au, ai-begins-shaping-retail-purchasing-decisions-for-australians-report-finds-202603*
(5) *www.roymorgan.com/findings/9826-risk-monitor-quartely-update-december-2024*
(6) *Liquor Tracker, Jan 25 vs Oct 25*
(7) *Nature Research, Understanding meaning of value, Feb 2023*

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Q3. WHAT WERE YOUR OBJECTIVES? State specific goals.

Objectives capture the long and short term aims of the campaign [redacted]

[redacted]

1. LEAD THE WAY WITH MENTAL CAPITAL

The first task was delivering a campaign that was both attention-grabbing and intrinsically linked to Dan's, to build on already category-leading saliency. Goals were set accordingly[8](8):

[redacted]

To set the brand up for long-term growth, positive campaign response also needed to be observed amongst light shoppers.

2. REASSERT VALUE TO DRIVE BRAND CONNECTION

[redacted]

Uplift across three key measures would deliver clear signals that the campaign was balancing long- and short-term brand connection to revive growth:

- Share of wallet - baseline [redacted]
- Share of purchase Intent - [redacted]
- Share of preference - [redacted]

[redacted] the goal was to achieve [redacted] growth for each, with a stretch ambition of building preference +5% amongst light/non shoppers.

3. [redacted]

[redacted]

[redacted]

[redacted]

SOURCES:
(8) IMI Campaign Tracking
(9) Liquor Tracker, Jan - Sept 25
(10) Liquor Tracker, Jan 25 vs Oct 25
(11) Endeavour Group, Dan Murphy's Sales Results, March 2026
(12) Endeavour Group, Customer Performance Report, Jan 2026

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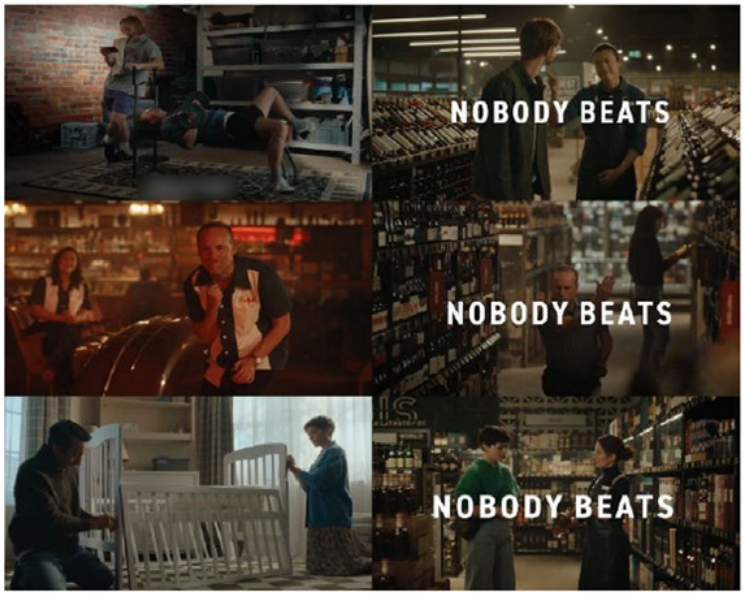
Q4. WHAT WAS YOUR STRATEGY AND HOW DID YOU GET THERE?

Brand vs retail mixology

Whilst Dan Murphy's business had been built on everyday-low-prices, its communications had evolved to reflect a broader proposition of price, service and range: A deliberate move to build future demand and rise above the clutter of price-led communications. It helped position Dan's as uncompromising in subverting the heuristic that you need to trade off quality, range or services for a low price. Not all low prices are created equally, as Dan's demonstrates, and the brand's broader proposition anchored the brand as quality discounter, not no frills dealer.

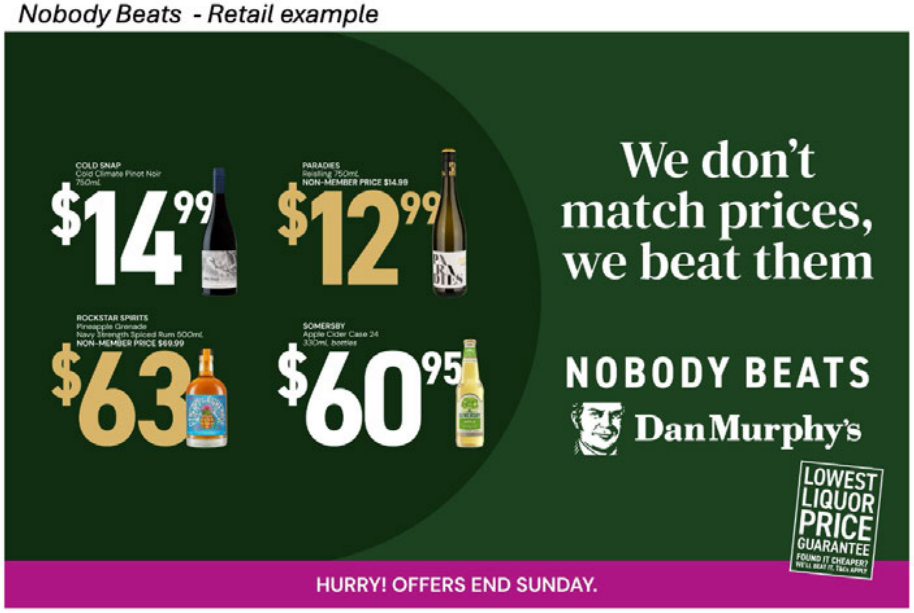
The other layer was the brand's direct retail gear, focussing squarely on 'product and price', converting closer to the point of sale.

Nobody Beats Campaign Platform



Source: Endeavour Group

Nobody Beats - Retail example



Source: Endeavour Group

Value seeking - less a segment, more a universal mindset

As mentioned, cost-of-living meant even more scrutiny over prices. 41% were shopping for sales more often[13](13) and 30% were doing more comparative shopping online.[14](14) Price became the #1 decision driver in most categories.[15](15)

Value seeking was more pervasive than ever. Less a 'discrete' segment than different profiles within a spectrum. Paying full price for something in a deal-centric world felt like you'd been short changed, as if you were 'losing' money.[16]

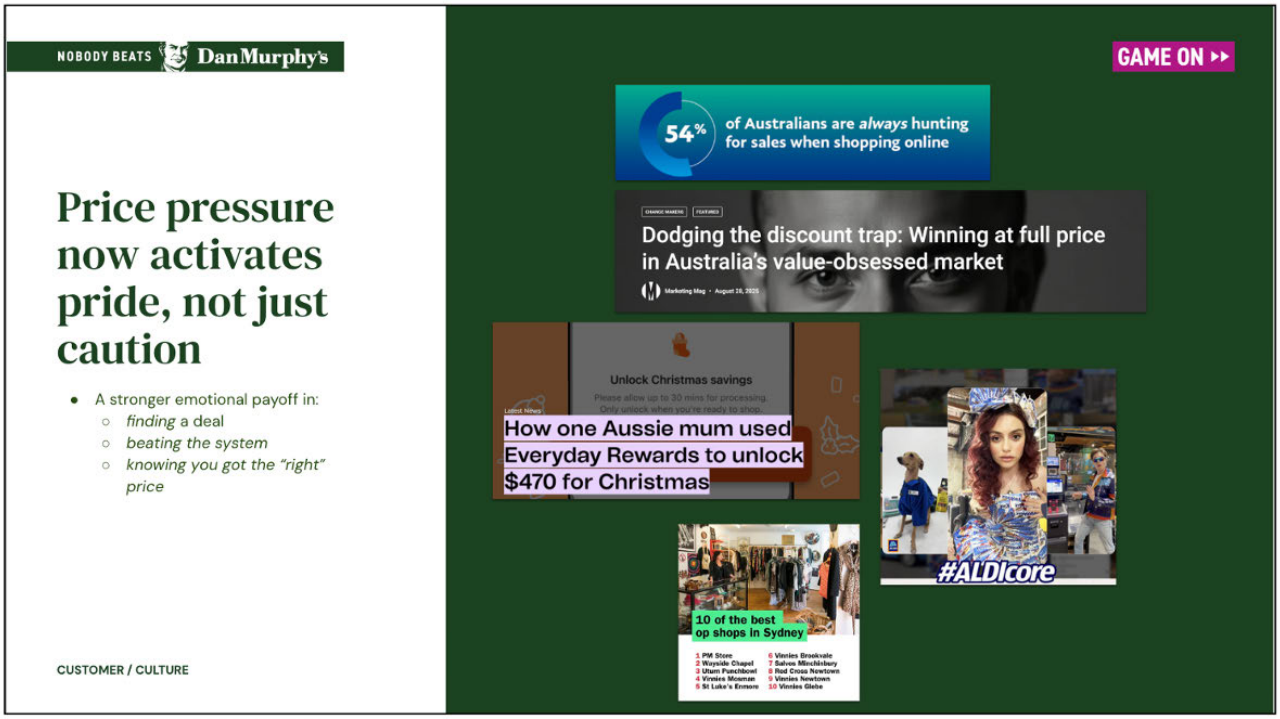
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[redacted]

[redacted]

Moreover, pride in ‘extracting’ the right price was more evident, where low prices might have once had a stigma.

Pride in low prices



Source: Agency Strategic Response

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Given this pervasive mindset and a climate where consumers were narrowing their focus on price, [redacted] We needed to create more airspace around price leadership, in a distinctively Dan's way.

Brewing a new campaign architecture
We needed to augment the campaign architecture making it fit for more ambiguous times. More aggressively competitive times.

Whilst Field & Binet might have an allergic reaction to this, the layer that Dan's needed was brand-led retail thinking. A way of showing up and having a point of view on value and low prices that operates at a different altitude and compresses the funnel. Brand work that earns its keep in the short-term.

At the core of Dan's
"I beat all my competitors every month, every week, every day, every hour, on every price, on every product, on every bottle..." – Dan Murphy, 1995.

For Dan, price-beating was an extreme sport. A finely honed skill. An unmatchable sixth sense.
Dan Murphy's staff checked competitor prices continuously. This was dynamic EDLP, backed up by the first, and only, lowest price guarantee (LLPG) in the liquor market. We needed to create a moat around Dan's as a destination of everyday low prices. LLPG being the exclamation point.

Busting out of DBA slop
And the epitome of that tenacity of Dan, the man, was in the brand mark - his bust. [redacted] 17) A DBA worth cracking open a bottle of EDLP bubbles over. We saw this as an opportunity to take advantage of an iconic brand visual identity, and make it work even harder for the business. But we needed to turn it into one with more meaning.

We set out to do this differently from the DBA clutter, where logos and shapes are used liberally but perhaps not always meaningfully. Dan's deserved something more enduring, elevated.

So the bust could not just be a stamp. Or an artefact of the founder. We needed to pour current, contextual meaning into that face, that very particular expression - conveying that steeliness and intensity around achieving low prices, everyday.

This approach could help rebuild price trust without shouting prices - in Dan Murphy we have a symbol that was simple, consistent and impossible to fake.

[redacted]

SOURCE:
(13) *Forbes, AI Reveals Ideal Prices For Budget-Savvy Shoppers, April 2024*
(14) *Forbes, AI Reveals Ideal Prices For Budget-Savvy Shoppers, April 2024*
(15) *Branding Strategy Insider; Of The Four P's, Price Is The Most Important; CHOICE, More people using unit pricing to save, but less find it useful as labelling issues increase*
(16) PayPal Newsroom 2025, 7-in-10 Australians plan to shop the End of Financial Year Sales
(17) Ehrenberg Bass Distinctive Asset Testing, 2019

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Q5. HOW WAS YOUR STRATEGY BROUGHT TO LIFE?

IDEA: DAN HAS AN EYE FOR VALUE

Dan, the man, is one of the most recognisable and enduring figures in Australian retail.
Iconic. His bust stands at every store: familiar, authoritative and quietly confident; we used Dan's all-seeing stare as a shorthand for price certainty. When it comes to value, he knows.

By transforming a static brand asset into an active signal of trust, the campaign made everyday low prices visible again not through claims or promotions, but through confidence.

No logo. No price points. No fine print. Just Dan, locking eyes with Australians and challenging them to find better value elsewhere. The absence of explicit messaging was the message: everyday low prices don't need to be explained or defended. It positioned Dan's promise as a truth, not a tactic.







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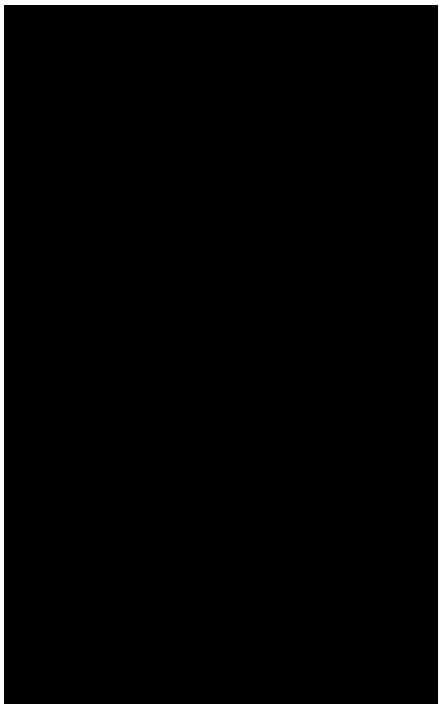


Omnipresence built to lock eyes everywhere

Media was designed to drive mental availability (scale) and prime with creative showing up in the most relevant context. It launched during a critical time in the retail calendar - the runway to Christmas. We needed to lock down our everyday low price authority, way ahead of that,

This was about painting the town Dan's, and like the Mona Lisa, Dan's eyes would follow you everywhere.

Media leaned into four strategic pillars; Bigger, Bolder, Braver, and Better, building an integrated national ecosystem across screens (TV, VOD, YouTube), audio, OOH (large format, street furniture/posters, retail), digital (Meta, TikTok & display), plus high-impact bespoke OOH and partnerships.



A multiplier effect through Dan-domination

Beyond spots & dots laydown, the media strategy maximised impact, taking advantage of the multiplier effect, combining OOH, screens & audio. OOH delivered a 'Dan's Domination'. Partnering with JCDecaux for takeovers and with QMS to bring animated 3D large format to life on 'Emporium Cube'. With Apparition, bold murals and with Running Boards mobile billboards appeared in proximity to Dan's and cheekily, competitors' stores.

Foxtel's Cricket integrated partnership extended momentum beyond Christmas, embedding value cues within The Ashes from ownable in-play assets to bespoke gifting segments fronted by commentator talent. Our SEN audio partnership kept Dan's voice alive across summer sport with "Ricky's Eye for Value", hosted by Ricky Ponting.

The campaign did more than capture attention; it solved a problem. Media and creative worked hand in hand to prove that Dan's does the mental price-math for you. As a result, rebuilding price trust not through promotions, but through unmistakable belief in Dan's existing proposition.

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Q6. HOW DO YOU KNOW THAT YOUR CAMPAIGN WAS SUCCESSFUL?

Results exceeded objectives, with a stand-out campaign delivering exceptional brand and business recovery:

[redacted]

[redacted]

1. **LEAD THE WAY WITH MENTAL CAPITAL**

- Awareness of the campaign [redacted] - 42 points, 140%, above benchmark[18].(18) (IMAGE)
- [redacted] recognised the campaign was for Dan's, almost doubling the previous campaign result [redacted] 19) (IMAGE)

Positively, we weren't just preaching to the converted [redacted] 20)

[redacted]

[redacted]

IMI Australia, Endeavour's campaign tracking partner, may have put it best:

"This campaign exemplifies everything IMI defines as best practice. It's perfectly creative while ensuring the core message consistently and clearly shows up in every touchpoint...this is a campaign unicorn...and is one of the strongest brand campaigns we've tracked" - ***IMI Australia***

2. **REASSERT VALUE TO DRIVE BRAND CONNECTION**

[redacted]

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SOURCES:

(18) *IMI Campaign Tracking, Week 5 Peak recognition, November 2025*
(19) *IMI Campaign Tracking, November 2025 vs May 2025*
(20) *IMI Campaign Tracking, Week 8, Dec 2025*
(21) *Liquor tracker, Mental Penetration, Jul/Sept 25 vs Dec 25/Jan/Feb 26*
(22) *Endeavour Group, Share of Search Analytics 2025-2026*
(23) *Liquor Tracker, Oct 25 vs Jan 26*
(24) *Liquor Tracker, Non/Light, Oct 25 vs Dec 26*
(25) *Liquor Tracker, Non/Light, Oct 25 vs Jan 26*
(26) *Liquor Tracker, Market Performance Metrics, Nov-Feb 24/25 vs Nov-Feb 25/26*
(27) *Liquor Tracker, Market Performance Metrics, Non/Light shoppers, 24/25 vs 25/26*
(28) *Endeavour Group, Dan Murphy's Business Results, average YOY growth, Nov-Dec*
(29) *Endeavour Group, Dan Murphy's Business Results, December 2025 vs 2024*
(30) *Endeavour Group, Dan Murphy's Business Results, sum of additional transactions Nov-Feb 24/5 vs 25/6*
(31) *Endeavour Group, Customer Performance Report, Dec 2026*
(32) *The Shout, National Liquor News, Feb 2026, for the 27 weeks ending 4 January 2026*





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Q7. WAS THE CAMPAIGN A GOOD INVESTMENT?

The Eye for Value campaign has proven itself to be a very worthwhile [redacted]

SOURCES:
(33) Analytic Partners, Commercial Mix Modelling, Q2 FY 2026, March 2026
(34) Analytic Partners, Commercial Mix Modelling, Q2 FY 2026 vs Q2 FY 2025, March 2026
(35)Endeavour Group, Annual Report 2025
(36) Analytic Partners, Commercial Mix Modelling, Q2 FY 2026, March 2026

Q8. DEMONSTRATE THAT THE RESULT WAS NOT DUE TO OTHER FACTORS

What role did price promotions play?

[redacted]

Was it just category growth?

The liquor category has been in structural decline for years, so growth that Dan's experienced comes in spite of the category performance, not because of it.

[redacted]

Did Dan's open lots of new stores?

Dan's saw the same number of store openings YOY[38](38)

Was growth down to Dan's inclusion within other online channels?

[redacted]

SOURCES:
(37) Analytic Partners, Commercial Mix Modelling, Q2 FY2026
(38)Endeavour Group, Store Count, 2026
(39) Ultra Convenience Channel Performance provided by Endeavour Group

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Q9. GIVE CONTEXT TO BUDGET IN COMPARISON TO COMPETITORS.

Q10. GIVE CONTEXT TO THE BRAND'S OVERALL BUDGET.

Q11. MEDIA BUDGET ELABORATION

Brand investment and premium placement increased YOY budget. Vast majority of investment behind paid, with owned POS/In store activity and social posts comprising approx ~10%[40].

Q12. DESCRIBE OWNED MEDIA ACTIVITY

Front-of-store digital screens replicating OOH creative. Platform first owned social posts amplifying "eye for value" on Instagram x8 and Tiktok x2.

Q13. OUTLINE ANY SPONSORSHIPS

Foxtel's Cricket integrated partnership

SEN audio partnership

Q14. OUTLINE COMMUNICATION TOUCHPOINTS

- TV, VOD & Online Video
- Multi-format OOH:
  - Large format
  - Retail OOH
  - Street furniture
  - Mobile Billboards
  - Wall Murals
- Audio branded commercials (Spotify)
- Social (Meta & TikTok)
- High-impact digital display (GumGum)

[40] *Media breakdown provided by Endeavour Group*

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