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Case Study



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McDonald's Australia

Title
From Happy Meals to Squid Game: how Macca's grew up for the way young adults play

Category
B12. Media-Led Ideas

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

When Gen Z and Millennials were young, they thought of McDonald’s as a place to play. They grew up lovin’ not only the food, but also the playful experience that came with it, which had become a thing of the past.

To bring play back to Macca's we partnered the world's biggest family brand with the largest, most provocative Netflix show of all time, giving millions of fans the opportunity to experience the iconic Squid Game Dalgona Challenge for themselves, with a Macca’s twist.

We delivered sold-out restaurants, baskets up 50%, increased brand love, massive PR reach, and $4.27 back for every $1, smashing business, brand and channel benchmarks at every turn.

Our insight was simple. Australia's Gen Z and Millennials hadn't outgrown play. They'd outgrown the play Macca's was offering them. The generation that should have been our biggest fans was drifting toward brands showing up sharper in the culture they paid attention to.

When Netflix announced Squid Game Season 2, we saw a way back in. An audience notoriously hard to reach in advertising, so this needed to be more than a partnership of borrowed IP.

Beginning with the meal, we created a Squid Game challenge straight from the show: an impossible Dalgona candy stamped with the Macca's M. We reinvented the entire Macca's experience for young adults to play Squid Game IRL.

Squid Game helped Macca's playfulness grow up, meeting customers in the way they engage with culture today, with huge results for business and brand;

1.155 million Squid Game Meals sold.
Exceeded sales projection by 35%.

Successfully grew brand relevance scores with Gen Z by+2pts (vs goal of +1pts)

Against a modest budget of $1.5 million media, achieving an ROI of $4,27, a massive 47% above Macca's benchmark.

This case deserves the Media Led award because the media idea was the unlock. Not the show, partnership or spend. A clear-eyed read of a generation Macca's had lost touch with, why that was happening, and a leap of faith on how to get them back.

Our idea transformed the experience while staying true to brand DNA; Dare to Play began with us daring to reimagine play itself.

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Q2. WHAT WAS THE STRATEGIC COMMUNICATIONS CHALLENGE?

The brief in brief:
How do we make Macca's feel relevant again to young adults - a cohort who have stopped engaging with Macca's products, brand and advertising?

1. **The fast food category was in decline**

Macca's continues to lead the Australian fast-food market, but in 2024 our share had softened down 1.3 percentage points in Q1 2024. In early 2024, the category also faced significant pressure, with customer numbers falling 9% versus pre-COVID levels as cost-of-living constraints weighed on demand.

2. **Our growth decline was driven by our younger <35's audience**

McDonald's were experiencing a decline in fast food traffic, which was predominantly driven by our under 35 age group.

3. **Cost of living was impacting our brand value perceptions**

At the same time, our edge with Gen Z and Millennials was slipping. Competition from KFC and Hungry Jack's eroded affordability perceptions, while younger consumers (16–34) were hardest hit, driving a 4-point decline in Macca's "value for money."

4. **Notoriously hard to reach audience**

For Gen Z and Millennials, the issue was deeper than price, it was relevance. They still associated Macca's with child-like fun, but hadn't experienced it that way in years. The Happy Meal generation had grown up but the brand hadn't.

Mass channels wouldn't fix this. For an audience that actively avoids advertising, being louder or bigger would only push them further away. We couldn't buy attention, we had to earn it.

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Q3. WHAT WERE YOUR OBJECTIVES? State specific goals.

Macca’s didn’t need awareness. As Australia’s most recognised fast-food brand, the challenge was more difficult: reconnecting with younger Australians who had grown up loving Macca’s, but no longer saw it as meaningfully part of their world.

We had a mix of short-term objectives to drive sales of a limited time promotion and meal, but more critically, we had to reawaken brand affinity and love, while ensuring we delivered standout, above benchmark return on marketing spend.

1. Drive YoY sales growth
Target: +1% sales comp (compared to year ago) during the campaign window.

2. Drive YoY transaction volume.
Target: +0.51% GC comp (guest count compared to year ago) during the campaign window

3. Reawaken brand love among Gen Z and Millennials lift "Brand for people like me"
Target: +1pts.

4. Meet or exceed benchmark ROMS.
ROI calculated against Gross Profit.

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

What was your strategy and how did you get there?

We started by getting close to young adults, their media diet and what they actually thought of Macca's.

Famous for fun and play, not seen as for them
Brand tracking told a sharp story. Gen Z and Millennials still associated Macca's with fun. But fewer and fewer of them claimed Macca's as fun *for them*. The fun they remembered was Happy Meal-aged. They'd graduated from Macca's, because Macca's offerings hadn’t kept pace with their preferences and passions.

Attention deficit wasn’t the problem - Avoidance and Immersion Mode unlocked how to reach and influence young adults
Then we got into how this audience spends their time and attention. They don't watch culture. They devour it. They binge entire seasons in a night. They live inside fandoms. They switch between two modes: Avoidance Mode for anything that smells like advertising, Total Immersion when culture pulls them in. Mass channels alone wouldn't move this audience. We'd needed cultural depth and connection with what they’re craving; true fandom.

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We stayed true to the brand, forever ensuring we stuck to what makes Macca's, Macca's.
For half a century, the answer was play. Happy Meals. Toys. Cartoon characters. Birthday parties. No other QSR brand in Australia owns play the way Macca's does. It is home turf. It is uncontested. It is brand DNA.

The problem wasn't that Macca's had lost its claim to play. It was that Macca's play had stayed Happy Meal-aged while the audience grew up.

Our key insight.
Young adults hadn't outgrown play. The play Macca's had of offer hadn't grown up with them.

Informing a strategy that was simple, and radical for a brand of our size;
Reinvent Macca's play for a grown up audience

A partnership would have been a logo on a meal box. A reinvention was needed - something that re-imagined the experience as grown-up play, thus resetting the relationship with this critical Gen Z audience.

We needed to connect with their cultural passions in a way only Macca's could and build upon the experience in a playful way.

Netflix's Squid Game became a global phenomenon in 2020, with fandoms exploding overnight. We uncovered a unique insight into the largely Gen Z based Squid Game fandom – they had an innate desire of wanting to participate and play in the games, curious how they would fare in the challenges.

We secured a market-first sponsorship deal with Netflix Australia agreement that gave us exclusive rights to Squid Game IP across every channel of the campaign, every touchpoint of the experience and, critically, into the product and meal itself.

We didn't slap a Squid Game logo on a meal and a campaign - we painstakingly created a fan-first Squid Game campaign through Macca's, inviting millions of Aussies to Dare to Play?

It began with a simple leap of imagination;
What if we made an 'Impossible M' Dalgona Candy Challenge, and invited Australians to take test their game skill, replacing the show's impossibly hard Umbrella candy shape with an even more challenging Macca's 'M'.

From that unfolded an entire brand experience universe that dared fans to immerse themselves.

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Q5. HOW WAS YOUR STRATEGY BROUGHT TO LIFE?

We set five campaign principles to guide every decision.

1. Reinvention, not partnership. Whatever we did couldn't be borrowed IP wrapped around a Macca's logo. It had to redefine what Macca's is for adults.

2. Play, grown up. Same brand truth, sharper tone. The play had to be edgier, harder, more participatory, more shareable than anything Macca's had done in years.

3. Cultural depth over media weight. Build a world fans could step into, not a campaign they could scroll past. Bet on immersion. Bet against impressions.

4. The brand at the centre of the play. No bolt-ons. The Macca's M had to be the artefact, the challenge, and the prize. The brand was the game.

5. The restaurant as the stage, products as the hero. Macca's restaurants are the original playground. The experience had to live in-store and in the product first, then ripple outward across channels, activations and experiences.

We challenged Aussies to "DARE TO PLAY?"

Understanding the Squid Game fan innate desire of wanting to participate and play in the games, curious how they would fare in the challenges. So we gave them something worth playing, sharing and talking about.

The campaign headline is an invitation to experience the show in real life, a challenge to experience and showcased a grown up form of play on offer from Macca's.

The Season 2 launch gave us an unmissable cultural scale, at a fraction of equivalent rate-card media value. Every touchpoint was designed to pull young adults into the world of Squid Game, not just remind them it existed.

This was more than a campaign; it was a playful brand act and immersive experience that ran from the street to the screen to the restaurant to the palm of your hand, with every layer designed to deepen immersion, not interrupt it.

Tease

Before the reveal, Pink Guards appeared in public spaces, silently handing out recruitment cards to unsuspecting Australians. Cracked Dalgona 'M' shaped OOH ran in deliberately untranslated Korean, decoding to DARE TO PLAY for those willing to look. A working phone number connected callers to a Front Man voicemail.

The "campaign" had already started... but people just didn't know they were playing yet.

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IRL activation

A physical activation zone brought the Squid Game world into reality with a sandpit, theme music, Pink Guards in person. For a generation that experiences everything through a screen, a tangible, shareable moment fans couldn't resist..

The Macca's Squid Game Meal

The reveal delivered a bespoke Squid Game Meal box housing one of four iconic candy shapes. At the centre of it all was Macca's own version of the Dalgona challenge, reveal the candy shape without breaking it. Three shapes were hard. The Macca's M was designed to be nearly impossible.

The product wasn't just the hero, it was the centrepiece of the real Squid Game fans could play with Macca's..

The Macca's Squid Game Challenge (Competition)

Competition is at the heart of what makes *Squid Game* so addictive, and our Macca's Squid Game Challenge was critical at driving engagement and repeat purchase and more play occasions. Carve out a triangle, star or circle successfully and upload it to our app for the chance to win exclusive co-branded player trackers. Master the Macca's 'M' shape and you'll go into the draw to win $100,000.

The game: play in your hands

A QR code on the meal box opened into a fully immersive mobile game. Full sound design, ominous countdown timers, custom Pink Guard reactions. Once their cookie was completed, players could scan their shape into the digital experience, to 'verify' with the guards whether they had completed the challenge.

The game averaged 9 minutes of playtime - massive dwell time for a mobile activation that smashed all Macca's records. 206,000 unique players entered. 48,000 cracked their shape. 7,000 conquered the (near-impossible) Macca's M.

Paid media owned the streets, screens and commanded attention

We maximised reach and engagement among Gen Z and Millennials with premium placements, including bespoke train station creative, mirroring Squid Game's locations to launch with impact and relevance. A cinematic Korean-language film, produced with original voice talent, ran across digital channels - giving the campaign a cinematic credibility that matched the show's own production values.

Inside Macca's restaurants, you stepped inside world of Squid Game. Roadside signage, drive-thru animations, menu boards, kiosk skins and packaging transformed every touchpoint into additional experiences to play, inviting deeper engagement, interaction and rewards. Randomised Front Man interruptions played across front counter screens - this kept the experience unpredictable and alive across every visit.

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Earned, paid social and PR helped amplify the experience fan-to-fan

TikTok influencers seeded organic content that the algorithm caught and ran with; 1.2 million views on day one. Reddit forum takeovers placed Macca's inside conversations already happening about the show. BuzzFeed editorial coverage extended reach further.

We also extended the conversation across Little Red Book and Weibo to ensure that we to ensure that we were present for Chinese and Korean audiences where culture is shaped, shared, and amplified

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

All five primary objectives were delivered, and secondary measures of success were even more impressive;

1. Drive YoY sales growth

Target: +1% sales comp during the campaign window.
Result: +1%

A sold-out commercial success. Just over 1 million Squid Game Meals sold - with restaurants across Australia running out of stock.

The Squid Game Big Mac Meal delivered 35% above its sales projection and average basket size was up 50% in the campaign window. Successfully growing our share of Gen Z and Millennials across the campaign window.

In short, nailed it.

2. Drive YoY transaction volume.

Target: +0.5% GC comp during the campaign window.
Result: +0.74%

We exceeded the guest count goal by roughly 50%, a measure of transactions and visitation in-restaurants. Successfully growing our volume of Gen Z and Millennials over the campaign period.

Big win.

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3. Reawaken brand love among Gen Z and Millennials lift "Brand for people like me"

Target: +1pt for “Brand for people like me”
Result +2pt

A two-point lift on this measure with this cohort sits at the top of what a single campaign window typically delivers on Macca's brand tracking. It’s a huge result for a brand of this scale, off a relatively smaller media budget.

The shift suggests the Squid Game work didn't just borrow attention. It reframed the brand for an audience that had been drifting away.

Huge success on this one!

4. Meet or exceed benchmark ROMS.

Target: $2.91, marketing ROI calculated against Gross Profit
Result: $4.27, exceeding Macca’s benchmarks by 47%

This put the campaign in the upper tier of high performance Macca’s campaigns, a huge result.

Beyond the primary objectives, the campaign also delivered:

- Squid Game Big Mac Meal: 35% above its sales projection.
- Average basket size: up 50%, from $20 to $30, in the window.
- Total attributable sales: $18,102,931.
- 206,000 mobile game players.
- 9 minutes average playtime in the digital game.
- 48,000 successful candy-shape entries.
- 7,000 successful entries on the impossible Macca's M.
- 43.2 million organic reach.
- 1.2 million TikTok views on day one.
- 127 press articles in the first 48 hours.
- 114 million targeted digital impressions.
- TikTok engagement: 19,400% above industry benchmark (absolute base to confirm).
- Meta views: 737% above industry benchmark (absolute base to confirm).

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Q7. WAS THE CAMPAIGN A GOOD INVESTMENT?

Absolutely.

The campaign returned $4.27 for every $1 spent by the marketing team on production, media and partnership costs.

McDonald's works closely with commercial intelligence provider Analytics Partners to provide insights and performance on their marketing spend.

Analytic Partners methodology calculates against gross profit uplift, reviewing spend across all channels and sales data, to determine the campaign was a massive success.

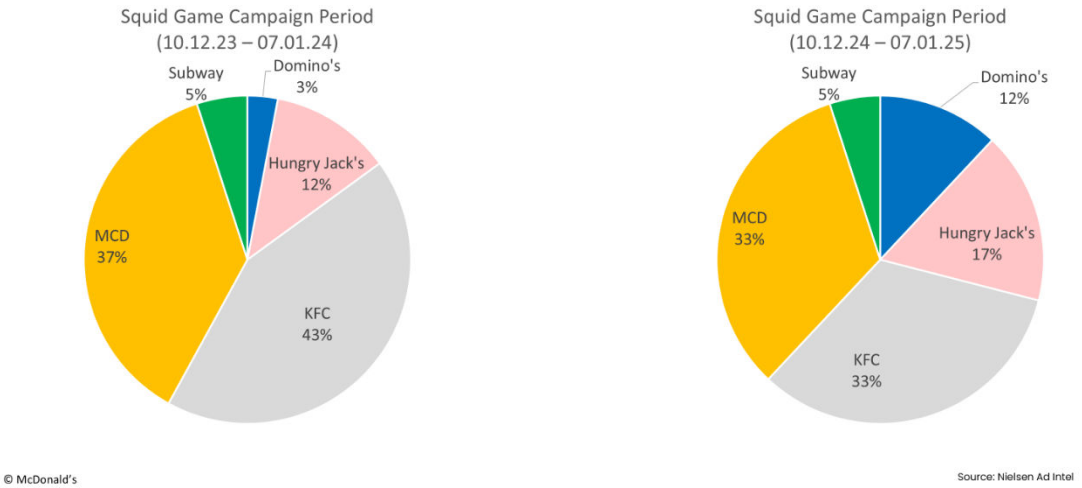
Q8. DEMONSTRATE THAT THE RESULT WAS NOT DUE TO OTHER FACTORS

Nothing else changed, pricing, menu, distribution, and store footprint held steady. Share of voice fell 4%, and media spend was down 26%. The only variable was the work.

Brand metrics moved because of the campaign, not the show. "For me" among Gen Z and Millennials doesn't shift from watching a series or buying IP, it shifts when a brand shows up differently.

Squid Game set the stage. Macca's performance came from what we did with it.

QSR Media Spend - SOV



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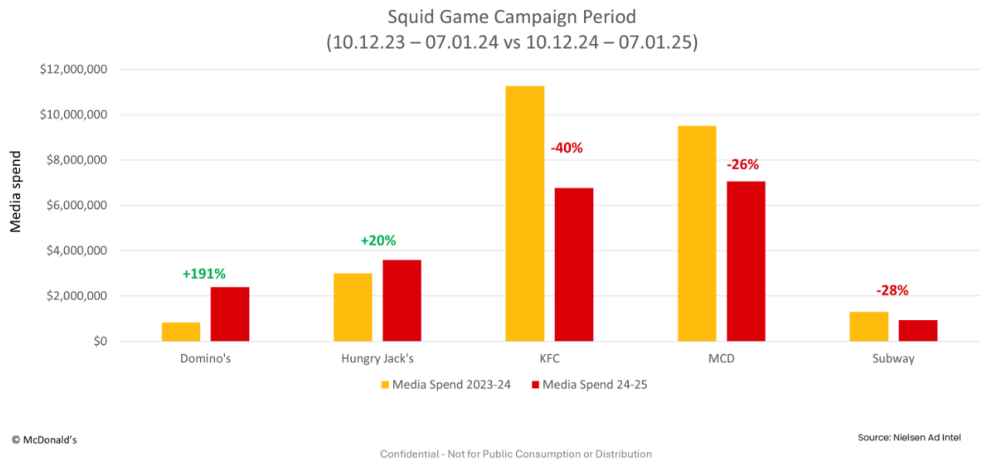
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Q9. GIVE CONTEXT TO BUDGET IN COMPARISON TO COMPETITORS.

Media investment across the QSR category softened in 2024 versus prior years, declining 15% year-on-year. During the campaign period, category spend fell even further, down 26%, yet despite this contraction, December remained one of the most competitive media environments of the year.

QSR Media Spend



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

Describe paid media activity

Media budget: $1.5 million.

The budget skewed heavily toward cultural depth rather than mass reach. The budget was intentionally weighted toward cultural depth over mass reach, focusing investment on high-impact moments designed to intrigue and engage fans at every stage of the campaign.

The market-first Netflix sponsorship locked in cultural scale at a fraction of equivalent rate-card media value. Paid social on TikTok and Meta provided amplification rather than reach foundation.

Tease Phase - $x240,000/16X%

Our media strategically symbolised iconic Squid Game themes and locations starting with our pre-launch tease phase, where we hinted at our unexpected partnership. Levering Netflix's PR schedule we had Pink Guards hand out cryptic recruitment cards featuring Squid Game shapes with the Macca's 'M', with a phone number and a secret message from the Front Man. OOH ads showed cracked Dalgona 'M' candies and Korean text, when translated, revealed our CTA 'DARE TO PLAY?'. As well as cryptic posts across Instagram and TikTok. The day before we launched the meal in restaurant we created an activation zone, complete with a sandpit, theme music, and Pink Guards, allowing fans and influencers to experience the challenge as close to the show as possible.

Launch - $1,260,000x/84X%

We strategically further mirrored the iconic Squid Game theme at launch, leveraging the underground OOH transit environments from the show with high impact station dominations and consecutive street furniture that further told the story of the partnership.

Online video and social were critical to achieving mass reach at launch with a cinematic Korean film which authentically recreated the show's iconic scenes. We took this even further with OOH that leveraged the underground transit environments from the show with high impact station dominations and consecutive street furniture that further told the story of the partnership.

Influencers ignited creative UGC across TikTok, Reddit, and BuzzFeed. A market-first Netflix show sponsorship secured campaign scale, ensuring an unmissable cultural moment and maximising reach and engagement among Gen Z and Millennials.

Q11. MEDIA BUDGET ELABORATION

Tease (7.12.23-10.12.23)		
Channel	Media Spend	Budget %
OOH	$ 120,000	8%
Stunt	$ 60,000	4%
Social media	$ 60,000	4%
Launch and Sustain (11.12.23-07.01.24)		
Channel	Media Spend	Budget %
OOH	$ 330,000	22%
Online Video (Including Netflix)	$ 500,000	33%
Cald Media	$ 30,000	2%
Social media (including influencers)	$ 400,000	27%
Total	$ 1,500,000	100%

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Q12. DESCRIBE OWNED MEDIA ACTIVITY

Macca's restaurant network was the primary owned channel, and the primary stage. Every drive-thru, every menu board, every kiosk, every front-counter screen ran Squid Game content during the campaign window. Meals, product and packaging worked as key driver of the experience and cultural artefact.

The Macca's app hosted the digital game extension. Players spent an aggregate nine million minutes inside the app during the campaign. Return visits to the app climbed sharply.

Q13. OUTLINE ANY SPONSORSHIPS

A market-first *Squid Game Season 2* partnership in Australia. We secured Tier 1 sponsorship, including Netflix RON media, IP rights, Korean voice talent, Pink Guard usage, and access to local and global PR. This wasn't just a media buy, it was the structural backbone that elevated the campaign into a true cultural moment.

Q14. OUTLINE COMMUNICATION TOUCHPOINTS

OOH: pre-launch tease, cracked Dalgona M with untranslated Korean.

In-restaurant digital: drive-thru screens, menu boards, kiosks, front-counter screens.

Packaging: bespoke Squid Game Meal box with candy shape and QR code.

Digital game: in-app mobile experience.

Cinematic Korean-language film: across digital.

Paid social: TikTok creator-led UGC, Meta video and display.

15" Online Video: showcasing the meal and partnership across Netflix, YouTube, programmatic

Digital large format OOH: showcasing the meal and partnership nationally

OOH Station Dominations: with JCD in key train stations across every capital city

OOH Consecutives:

Paid Content Partnerships Earned editorial: Reddit forum takeovers, BuzzFeed custom content.

Experiential: IRL activation zone, Pink Guards, sandpit, soundtrack.

Telephony: working phone line with Front Man voicemail.

Tease Activation: Pink Guard recruitment cards distributed on the street.

Each touchpoint earned its place either by deepening the experience for an audience already in Total Immersion, or by widening the cultural permission for the audience to step inside.

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