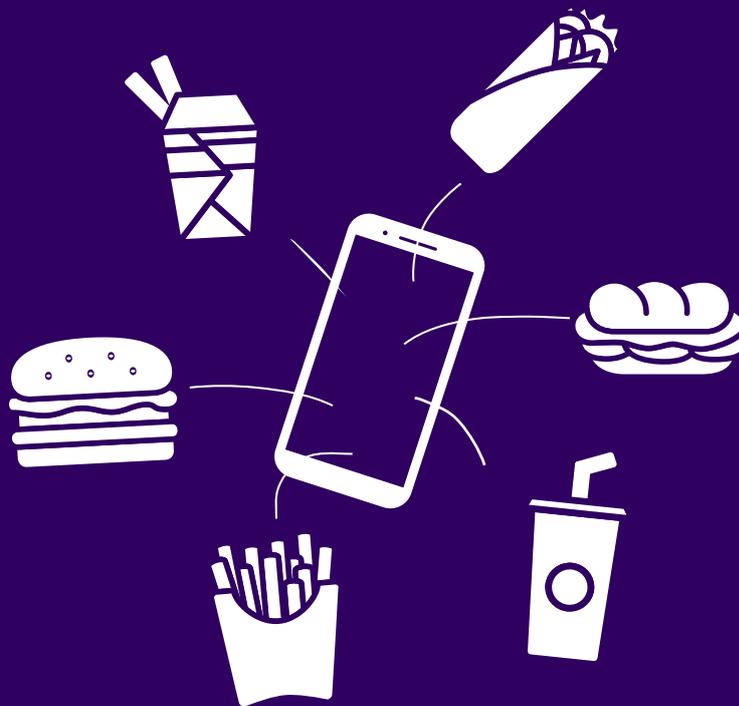




Enticing, Effective and Everywhere

How Brands are Keeping Unhealthy
Food and Drink in the Spotlight with
Digital Marketing to Young People



A foreword by Lanre Adeleye, Bite Back 2030 Youth Board

Junk food advertising is everywhere in our society. Whether we're scrolling on our Instagram feeds, watching our favourite TV shows or walking through our high streets, we're constantly swarmed with images of triple-dipped chicken, double-decker burgers and extra-large pizzas. Adverts have been made such a normal part of our day to day that we just accept them, we don't question them. This research is our opportunity to start.

As a young person I know I'm at the top of junk food marketers' hit list. Like so many young people, social media is a big part of my life and there's no doubt that junk food companies use this to their advantage. This one particular pizza ad pops up so often for me when I'm scrolling on my phone that it feels like it's permanently printed on my mind.

It's not just online though, it feels like everywhere I go I'm being stalked by GIANT images of burgers and pizzas that put these foods front and centre of my mind. I can't escape them and it's not just me. I've had many late night rants with friends who feel completely frustrated by the number of adverts they're exposed to.

We feel the scale of the problem, but this research backs what we already know to be true – young people are constantly bombarded with junk food ads and these have a huge impact on us. It NEEDS to stop.

Like many young people, I was dismayed by the Government's decision to delay new laws that would have helped take the worst of these adverts out of the spotlight. I hope this research will help shine a light on why we need to keep pushing on with action to restrict these adverts and protect children's health.



Lanre Adeleye, Bite Back 2030

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Executive Summary

At Bite Back 2030 we believe that marketing should be a force for good when it comes to child health. But currently, this isn't the case. Each year food and drink companies spend millions on a range of marketing techniques designed to do one simple thing – put junk food in the spotlight. As a result, children are constantly inundated with a stream of unhealthy food and drink adverts, that pop up everywhere they look.

Marketers are always coming up with clever new ways to entice young people into buying their products, and looking at the research it's pretty clear why. A wealth of evidence¹ now demonstrates the link between food advertising and children's food preferences and consumption. With most advertising shining a light on unhealthy foods, this is bad news for child health. That's why we set out to explore the impact of junk food advertising on children a little further.



Advert on social media

Through hearing from young people themselves we sought to unpack young people's exposure to and interaction with less healthy food and drink advertising, and its impact on them. To be a little more specific, we set out to investigate five major areas:

1. The types of marketing tactics being used by brands
2. The impact of exposure on young people's attitudes and behaviours
3. How often young people are exposed to food advertising
4. The type of food and drink products and brands advertised to them
5. Young people's understanding of the tactics brands use on them

To explore these, a mix of qualitative and quantitative research methodologies were used, including digital diaries with 50 young people aged 13-19 and a quantitative survey of 1,000 participants (of the same age group) to validate the qualitative findings.

¹ Boyland E, Nolan S, Kelly B et al. (2016). Advertising as a cue to consume: a systematic review and meta-analysis of the effects of acute exposure to unhealthy food and nonalcoholic beverage advertising on intake in children and adults, *The American Journal of Clinical Nutrition*, 103, 1(2):519–533, <https://doi.org/10.3945/ajcn.115.120022>

Key findings

- The food advertising young people see is compelling and highly effective in influencing them. Food advertising for less healthy products had a clear, immediate effect on participants, who reported feeling hungry, getting cravings for and wanting to purchase less healthy products after exposure.
- Brands deploy a range of marketing strategies to capture young people's attention. Advertising featuring price promotions and new product launches were the most compelling in influencing young people to want to buy from the brand advertised. Advertising playing on Gen Z trends and values such as environmental sustainability, community and inclusivity were also particularly effective at engaging young people, according to our qualitative research.
- A vital route in which brands target young people is online. A quarter of participants said they interact with brands online after seeing a less healthy advert (such as liking or sharing content or downloading an app), opening up a potential new route for brands to market directly to young people through owned media channels. Six in ten young people reported having a food and drink brand (e.g. McDonald's) or food delivery platform (e.g. Just Eat) app installed on their phone, via which brands can send them highly personalised marketing for products and discounts, at targeted times.
- Young people are regularly exposed to adverts for less healthy food and drink across a range of media platforms. Survey participants recalled seeing these adverts at least twice per day on average, and the qualitative research indicated that the amount of exposure is likely to be even higher. The under-reporting may be due to differences in perceptions of what food and drink is considered less healthy.
- Out-of-home food (e.g. pizza, burgers and other fast food) advertising dominates the advertising seen by young people.
- Brands target young people across a range of media channels. Social media platforms together are where participants encountered less healthy adverts the most, followed by TV. 35% of survey participants reported seeing adverts on YouTube at least once a day, 27% on TikTok and 24% on Instagram. Tik Tok emerged as a particularly influential channel for advertising in our qualitative research.
- Most of our participants (65%) know they are not randomly targeted with advertising, but there is little understanding of the exact ways that their data is being used by brands.



Advert on social media



Advert on social media



Advert on social media

Recommendations

- The Government must fully implement the new restrictions on advertising unhealthy products (classed as high in fat, sugar or salt) on TV and online without any further delays or watering down. In addition:
 - The Government should publish and commit to a timetable for implementation to be fully accountable.
 - Implementation guidance produced by the frontline regulator must be clear and robust and informed by evidence to prevent loopholes and weak points emerging.
- Policy must stay abreast of the rapidly evolving marketing space. The Government should continue to engage with academics, marketing experts, NGOs, young people, industry and other stakeholders to monitor the loopholes, exemptions and areas currently out of scope of regulations that will allow brands to influence young people. The Government should review and refine the policy to ensure it achieves its objectives of protecting children from harmful advertising. Future policy should include:
 - Restrictions on brand advertising by food and drink brands that are associated with and/ or predominantly sell less healthy food and drinks
 - Restrictions on use of owned media (including direct emails, messages and app alerts) to target young people with price promotions on less healthy food and drinks
 - Restrictions on sports sponsorship including regulation to ensure that only healthier food and drink products can be associated with sports, with robust new restrictions on any kind of sports-based marketing of unhealthy products and brands.
- Food and drink companies should shift their marketing focus to healthier options ahead of the new regulations coming into force and bring in stricter controls to stop targeting children and young people via food delivery apps or via their owned media channels.
- Young people deserve a better understanding of how their data is being used to influence what they see. Brands should provide transparent information about how data is collected and used for targeting.

Introduction

The impact of unhealthy food and drink advertising on children was first raised as a concern by the UK Government 20 years ago in December 2003. It took a further five years of proposals and consultation before new rules came fully into force that restricted advertising of food and drink products high in fat, sugar or salt (HFSS) in children's TV programmes.

20 years on and the TV rules have been supplemented with additional codes of practice (regulated by industry bodies) seeking to limit children's exposure to HFSS advertising across a range of media including online. But the rules are barely fit for purpose – according to estimates from the Government, children are still exposed to 2.9 billion HFSS adverts on TV and 11 billion online every year!² That's A LOT of adverts.

Clearly the existing rules don't go far enough. Recognising this and thanks to campaigns by Bite Back 2030 and other health organisations, in 2022 the Government passed a law restricting HFSS adverts on TV before 9pm and removing all paid for HFSS advertisements online. We thought we'd secured a big win for child health but the implementation date of these new rules has been pushed back twice and is now not due to come into force until 2025. That's years too late for the thousands of children who are being bombarded with junk food advertising every day.

While there's no question that advertising affects us all, we know that children are particularly vulnerable. That's because they are "more susceptible to the pressures of marketing, less likely to recognise paid-for content, and less likely to understand how data is used for these purposes than adults", as the New Economics Foundation warned in a study published in 2021.³ It's also important to note that children are not equally affected. Young people and adults in lower socioeconomic groups are more likely to report seeing adverts for unhealthy products.⁴ Unfortunately, the negative health impacts of unhealthy food and drink adverts seem to fall disproportionately on the youngest and poorest members of society. Evidence also shows that children who are already living with obesity consume more in response to food advertising.⁵

What's more, the online environment is rapidly developing bringing with it novel ways for brands to interact and build relationships with consumers. Branded content is becoming increasingly 'native', mirroring the tone of voice and formats that we'd usually expect from social media posts from friends and family. This means that it's becoming harder and harder for young people to know when they're being advertised to.

² DHSC (2022). : Introducing a 2100-0530 watershed on TV and online restriction for paid advertising of food and drink that are High in Fat, Salt and Sugar (HFSS) products

³ New Economics Foundation (2021). I-SPY: The billion-dollar business of surveillance advertising to kids <https://neweconomics.org/2021/05/i-spy>

⁴ Yau A, Adams J, Boyland EJ, et al. (2021). Sociodemographic differences in self-reported exposure to high fat, salt and sugar food and drink advertising: a cross-sectional analysis of 2019 UK panel data. *BMJ Open*;11:e048139. doi:10.1136/bmjopen-2020-048139

⁵ Boyland EJ, Whalen R. Food advertising to children and its effects on diet: review of recent prevalence and impact data. *Pediatr Diabetes*. 2015;16(5):331-337.

While the new regulations are welcome, some vital areas are out of scope – such as brand advertising and ‘owned media’ (content or channels in control of the brand such as their own social media) – that means junk food brands can continue to keep their unhealthy products centre stage in children’s minds. Advertising is an innovative and dynamic industry with marketers constantly developing new ways to keep their products in the spotlight. This innovation happens far faster than governments can regulate to protect children, meaning by the time new rules come into force they are at risk of being out of date.

This research aims to uncover the different ways that young people experience advertising for less healthy food and drinks and the enticing tactics used by brands to capture children’s attention and influence what foods play a starring role in their minds.

Methodology

A full methodology is included in Appendix 1.

To understand how young people encounter and interact with food and drink advertising on a day-to-day basis, a digital ethnography and a quantitative survey were run with a panel of young people aged 13 to 19, from the UK with diverse socio-demographic characteristics.

The qualitative research used an ethnography approach in the format of mobile diaries. 50 panellists completed four tasks over a week-long period through screen recordings, photos, videos and screenshots with captions. Participants were reimbursed with £175 for their time, in-line with industry standards for participant compensation. This was followed by a quantitative survey with 1,001 participants, to derive valid insights into the UK’s youth population. In addition, a steering committee of experts informed hypotheses that were tested with the research.

1. Digital advertising is enticing and highly effective in driving young people to want, buy and eat unhealthy food and drinks



Advert and purchase, documented in qualitative research

Food companies spend millions on advertising campaigns, carefully designed to appeal to their audience. Comments from the qualitative research highlighted the enticing power of this advertising with several participants discussing how the food adverts served to them made them 'crave' the particular product advertised.

“ I saw this Magnum advert on Instagram and it made me crave ice cream. It made me feel a bit peckish and definitely activated the midnight cravings. After seeing this, I would definitely buy these if I saw them in the shops. ”

Female, 16-19

“ Scrolling on UberEats and Pinterest late at night. The donuts look delicious and I wouldn't mind grabbing a bite. These adverts are very enticing and they are making my mouth water. ”

Female, 13-15

“ It made me feel bad as all I'm seeing are fast food places. And how they force it on young people. Sometimes it makes me crave for something so I would want to buy it. ”

Female, 16-19

“ I've really actually been craving Nando's, I've really been missing it, so this makes me miss it a bit more and makes me want go. I'm meant to be going there on Monday with my friends and then for drinks after. This has made me feel really excited. ”

Female, 16-19

As well as activating cravings, advertising has a direct impact on purchasing, with young people reporting being influenced to buy from the brands they see advertised to them.

“ While it was on my mum and I were talking about who was making dinner and we couldn't decide what to eat (like the girl in the advert) and then we decided to just order food instead. If the advert didn't come on we probably would have just made food that we already had. ”

Female, 16-19

“ I saw the advert on TikTok actually which is quite unusual. Usually I don't order from McDonald's but because all of the reviews were positive I decided to try something new. ”

Female, 16-19

“ I’ve seen the Domino’s advert on TV and on Twitter and Instagram. This advertisement definitely made me want to order Domino’s. ”
Female, 16-19

Interestingly insights showed that brand advertising can have a similar effect, even when no specific product is shown in the adverts – particularly when there is an existing brand preference.



Domino’s ‘We Got This’ campaign

“ The logo doesn’t remind me of anything, however seeing it does make me crave the food. I only crave food from brands I commonly eat. For example, seeing the Coca-Cola brand would make me want to have Coke, however seeing the McDonald’s logo wouldn’t make me feel any way as I don’t usually eat from there. ”
Male, 13-15

This is particularly concerning as brand advertising is excluded from existing and planned regulations on HFSS advertising. This exclusion will create a loophole that is likely to undermine the impact of the regulations as brands use their powerful brand identity to drive purchases. Several studies have shown that just seeing a food logo activates parts of the brain associated with reward⁶ and motivation⁷ and brand awareness is positively associated with calorie intake, with higher weight children showing greater responsiveness to food branding.⁸

Currently there is no robust way of defining whether a particular brand can be assessed as healthier/less healthy based on its product portfolio and/or sales, but existing regulatory codes from the Advertising Standards Authority recognise that brand advertising can be synonymous with HFSS product advertising.⁹

The qualitative research insights were supported by findings from the quantitative survey.

- More than one in three (37%) respondents said seeing adverts for less healthy food and drink makes them feel hungry and 35% said it makes them crave the product.
- 22% of respondents said adverts for less healthy food and drink makes them feel happy and 21% reported feeling curious to find out more about the product.
- Girls were more likely to report craving the advertised product compared to boys (35% and 26% respectively).

⁶ Fehse, K., Simmank, F., Gutyrchik, E., & Sztrókay-Gaul, A. (2017). Organic or popular brands—food perception engages distinct functional pathways. An fMRI study. *Cogent Psychology*, 4(1), 1284392.

⁷ Bruce, A. S., Bruce, J. M., Black, W. R., Lepping, R. J., Henry, J. M., Cherry, J. B. C., ... & Savage, C. R. (2014). Branding and a child’s brain: an fMRI study of neural responses to logos. *Social cognitive and affective neuroscience*, 9(1), 118–122.

⁸ Forman, J., Halford, J. C., Summe, H., MacDougall, M., & Keller, K. L. (2009). Food branding influences ad libitum intake differently in children depending on weight status. Results of a pilot study. *Appetite*, 53(1), 76–83.

⁹ ASA (2017). Guidance on identifying brand advertising that has the effect of promoting an HFSS product. <https://www.asa.org.uk/resource/hfss-product-ads-and-brand-ads-identification.html>

In contrast, the majority of respondents believe they are resilient to adverts if they are from a brand they don't like: Nearly one in three said these leave them unbothered (30%) or they wouldn't feel anything (29%), and 25% even said they irritate them.

The survey provided further evidence that advertising is effective in driving young people's purchasing of less healthy products and opening up potential additional routes for brands to market directly to young people through their owned content. When asked what action they would take after seeing a less healthy advert:

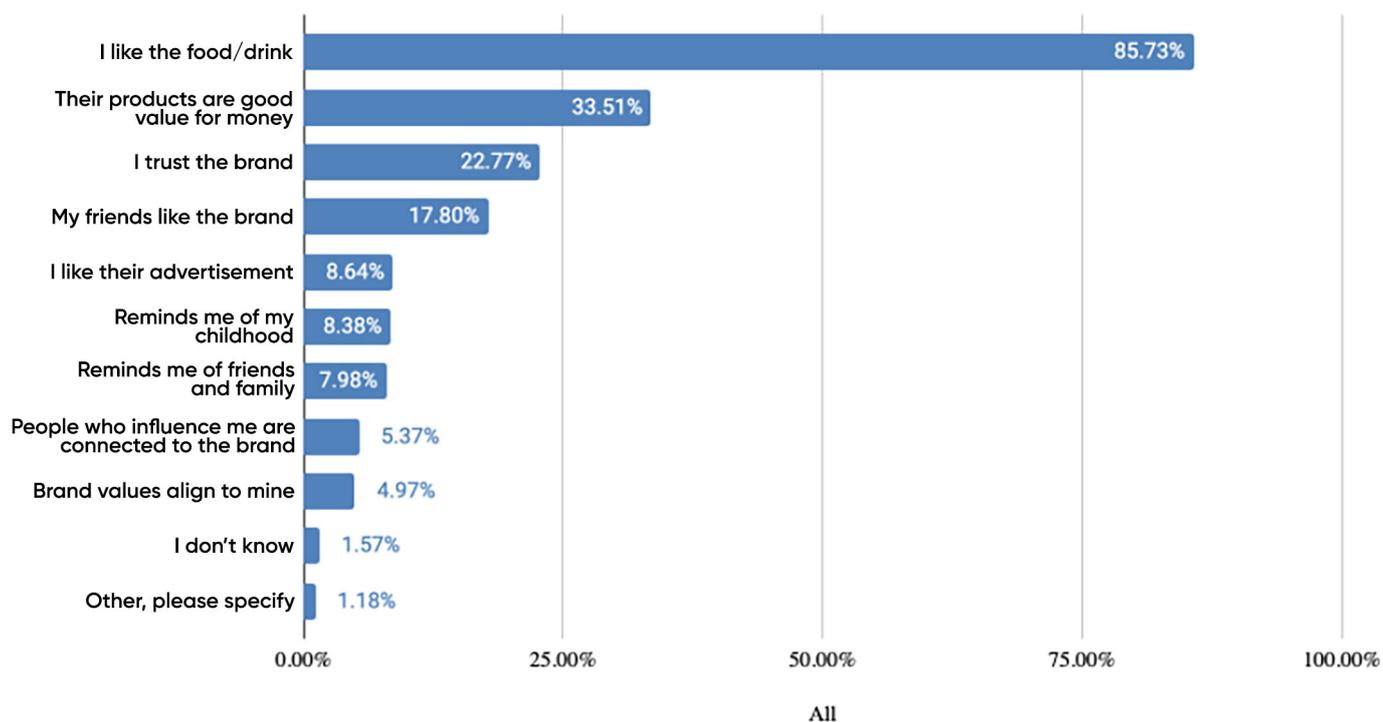
- 34% said they would buy it at the next opportunity.
- 15% said they would search for it to find out more and 14% would share with their family and friends.
- 25% said they would interact with the brand in some way such as following on social media (6%), liking the post (7%), sharing the post (5%) or downloading an app (7%).

2. Advertisers use a range of techniques to successfully appeal to young people

2:1 Price promotions within advertising

Price is one of the most important factors influencing brand preferences and advertisers use sophisticated discounting promotions to appeal to young people. When survey participants were asked why they like certain brands, value for money (selected by 34% of participants as important, see Graph 1) was ranked as the second most important factor after liking the food or drinks offered (86%).

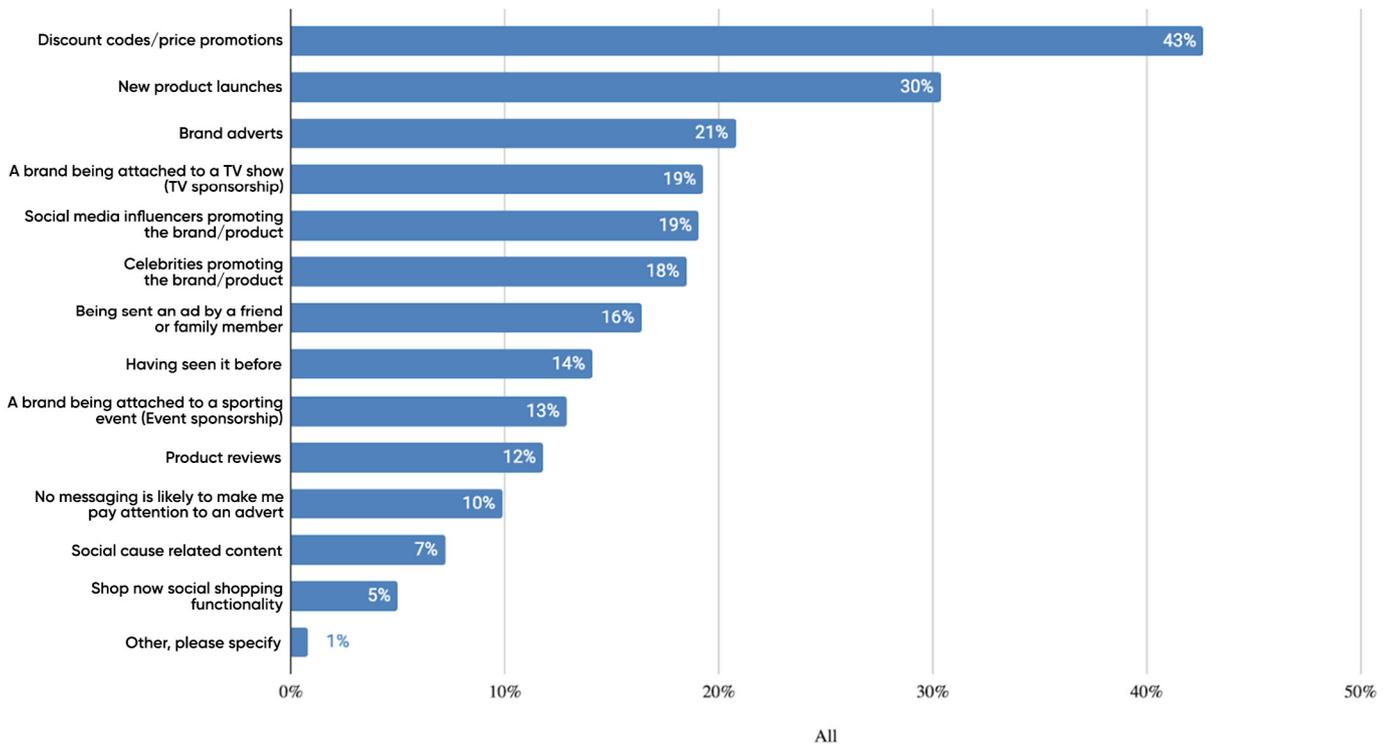
Graph 1: Reasons for liking brands, all participants



Question: Why do you like these brands? (Please select all that apply). N = 764

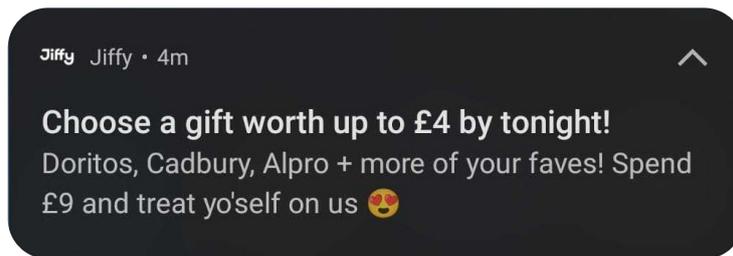
When asked further about the types of messages that they would be most likely to pay attention to, it became clear that discount codes or price promotions resonate most with young people – 43% chose this as one of the top three messages they would be most likely to pay attention to (see Graph 2).

Graph 2: Advertising types that are most likely to get the attention of young people, all participants (% reporting to have seen advert at least daily)



Question: What, if any, less healthy food/drink messaging is most likely to make you pay attention to the advert? (Please select up to 3) N = 1001

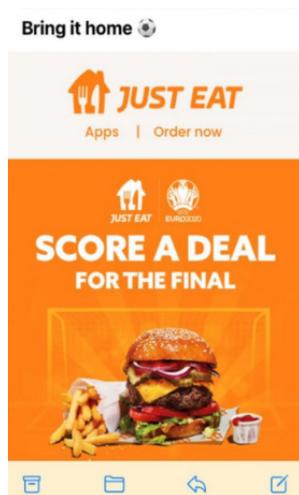
The appeal of price promotions was highlighted by participants in the qualitative research with young people articulating a direct link between receiving a promotional offer and wanting to use it to shop with the brand, due to the perceived value of the offer.



Advert from a grocery delivery app

“ Promotion codes help you save money which then makes you want to order it. ”
Female, 13-15

“ Email from Domino’s. I haven’t ordered from them in months. It’s a 50% discount when I collect. I kinda want to order because it’s so discounted. ”
Female, 16-19



Just Eat email, documented in qualitative research



Papa John's advert, documented in qualitative research

“ I did have an emotional reaction because it made me feel like I was able to save money on food for my mum and also have it delivered to our house. The action I took was to tell my mum about the service to see if it was something she would like to sign up for too. ”

Female, 13-15

The use of promotional offers within adverts as a marketing tactic aimed at young people is particularly concerning. There is strong evidence that price promotions, especially multibuy offers, are a significant driver that influences unhealthy food and drink purchases.¹⁰

The UK Government is taking action to restrict multi-buy price promotion offers (such as buy-one-get-one-free) on less healthy food and drinks by retailers from October 2023 (delayed from October 2022). This regulation is very welcome and will ensure retailers are unable to offer volume promotions on HFSS products either in-store, online or via advertising as the promotion itself will be unlawful. But it will not apply to out-of-home food outlets and it will also not restrict the use of price reduction promotions (such as 25% off) meaning both retailers and fast food outlets will continue to be able to use promotional offer tactics in their advertising to young people.

Once the advertising restrictions are fully implemented (due to be from October 2025), brands will still be able to target young people with price promotions on all kinds of unhealthy products using their owned channels such as direct emails or text messages.

¹⁰ DHSC (2020). Restricting volume promotions for high fat, sugar, and salt (HFSS) products https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1003921/impact-assessment-for-restricting-volume-promotions-for-HFSS-products.pdf

2:2 Alignment of brand values

Advertising that references a brand's support for particular movements and values was identified as a reason to feel warm about and want to purchase from a particular brand by young people in the qualitative research.

“ Seeing this advert [Coca-Cola] made me feel proud. I know that a lot of the footballers have been faced with discrimination and racial abuse. Seeing a big brand support them in their hardest moments was encouraging. I will make sure to support Coca-Cola more in the future. ”

Female, 16-19

“ I am so excited for Lipton ice tea to have recyclable bottles from 2022, I care about the environment quite a lot, so genuinely do feel guilty not having renewable bottles, so I am more likely to interact with the brand now. ”

Male, 13-15

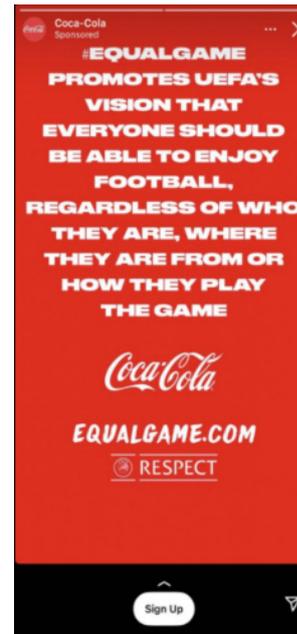
“ This buttermilk advert for chocolate makes me feel very happy and as if the future is positive as it is open to everyone as it's vegan, it makes me consider everyone who would be able to eat it. ”

Female, 13-15

“ I liked the advert because it was promoting meat free food, which is important. I will consider buying Richmond meat free burgers in the future. ”

Male, 13-15

Interestingly, just 5% of participants selected 'Brand values that align to mine' as a reason for liking a particular food brand in the quantitative survey, suggesting that it is not a factor that is front of young people's minds until they see a particular brand message. When prompted to select all the values that their favourite less healthy food/drink brands align to, the responses were aligned with wider Gen Z trends: Environmental sustainability (50%), Community (50%) and Inclusivity (45%).



Coca-Cola advert, documented in qualitative research

2:3 New product promotions drive interest and cravings

The research also suggests that advertising that highlights new products resonates with young people, and importantly, that it sparks interest and may lead to a young person craving the product.

The quantitative survey shows that 30% of participants are likely to pay attention to adverts promoting new food and drink products (see Graph 2).

This is demonstrated by an advert for a new product that was mentioned several times in the qualitative research. Some participants were excited about it and planned to try the new burger and participate in the Twitter debate about its spiciness, which the brand invited the audience to join. The quotes also illustrate the range of tactics used by the brand to increase customer engagement:



McDonald's ad promoting their new McSpicy burger, documented in qualitative research

“ This is the second time the McSpicy burger has been promoted to me today - on a different platform and through a different advert. ”

Female, 13-15

“ Made my Dad promise that we would get the McSpicy Chicken to try tomorrow. #result. ”

Female, 13-15

“ McDonald's McSpicy chicken advert popped up on my mobile. I saw it on the TV too! I definitely want to join the debate to see whether it is hot or not. ”

Female, 13-15

3. Fast food and food delivery apps enable further targeting of young people

Almost six in ten (59%) quantitative survey participants reported having a food and drink brand or food delivery platform app installed on their device; this is even more common among older teens (68% of 16 to 19 year olds compared with 47% of 13 to 15 year olds). The most popular apps among all participants are McDonald's (29%), Just Eat (29%) and UberEats (26%). In addition to facilitating purchasing, these apps provide a direct communication line between brands and their users, enabling highly personalised reminders for products and discounts, at targeted times.

There are some differences in the apps used by young people from lower and higher socio-economic backgrounds. Young people from a C2DE socio-economic background are more likely than those from ABC1 backgrounds to say they have installed food delivery platform apps, e.g: Just Eat (35% C2DE versus 24% ABC1) Uber Eats (30% C2DE versus 23% ABC1) or Deliveroo (21% C2DE versus 17% ABC1).

Insights from the qualitative research suggests that these apps make food purchases much more convenient:

“ I like McDonald’s Mondays. I use the app on my phone and my mum sees if I can have it. They have 99p deals. You can choose what you want and pick it up. It’s my favourite because it’s quick and easy. ”
Male, 13-15

While some young people felt irritated by how personalised the notifications from these apps can be, the appeal of price promotions was again noted.

“ This Domino’s advert came on my laptop around 12:23 in the afternoon. I did feel a little bit hungry because I had breakfast around 8:00 am this morning. I found it weird because about 2 hours later I received a notification on my phone from Uber Eats offering me £5 off my next order. ”
Female, 13-15

“ Promotion codes help you save money which then makes you want to order it. ”
Female, 13-15

Direct advertising from food delivery apps represent a form of ‘owned media’ and are therefore out of scope of the incoming advertising restrictions on unhealthy food adverts. However, it is worrying the ease with which young people are able to download the apps which exposes them to unlimited advertising. This is an area that requires further research to understand the impact on young people and inform further regulation.



Example of a McDonald's offer

4. Social media provides new creative opportunities for brands to engage young audiences

While TV continues to be a key channel for brands to communicate with young audiences, out-of-home and digital channels are an increasingly impactful way for brands to reach and engage teens.

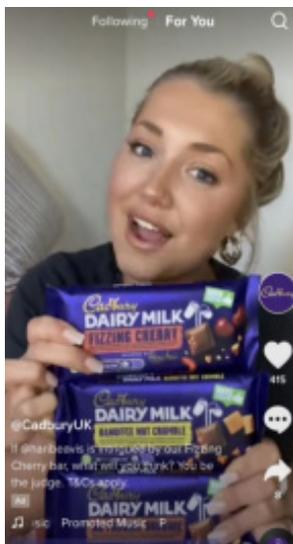


McDonald's advert on bus, documented in qualitative research

When asked to estimate the frequency of their advertising exposure to unhealthy food marketing across different channels in the survey, TV is where participants reported seeing adverts most frequently, with 51% reporting to see them at least daily. 23% said they see them each on billboards and posters, and 20% on bus stop posters at least once a day.

The numerous popular digital channels add up to the main source of exposure: 35% report seeing adverts on YouTube at least once a day, 27% on TikTok and 24% on Instagram.

TikTok is a social media platform known for its short viral clips and launching the careers of many influencers. The qualitative research highlights how TikTok content is trusted for recommendations from peers, and that it also makes it increasingly hard to distinguish paid-for from organic content.



TikTok video, documented in qualitative research

- “ I really liked this advert because it was on TikTok, you don't feel like you're watching an advert, you just think you're watching a normal TikTok. ”
Male, 13-15
- “ I bought this product, and since my TikTok is very focused on what I like, I often trust the reviews and comments a lot, so it was an easy decision to buy a new product like this. ”
Female, 13-15
- “ I love TikTok and I love scrolling through TikTok and seeing reviews and seeing how other people rate things. I love reading and checking reviews before I buy something. ”
Female, 16-19



Deliveroo's Full Life campaign with Maya Jama

Influencer partnerships continue to be impactful. A collaboration with the right influencer can get the attention of young people who might otherwise not consider the brand, as one participant explained in the qualitative research about Deliveroo's campaign with British DJ, TV and radio presenter Maya Jama:

“ I would probably watch that because Maya Jama, the girl in the video, is someone I follow on Instagram, so I would want to see what she's promoting. ”

Female, 13-15



A celebrity collaboration in 2023

5. Advertising in gaming and sports sponsorship resonate particularly with young male audiences

Whilst it was not ranked as one of the top platforms where young people are exposed to less healthy food adverts in the survey (just 14% of respondents recalled seeing less healthy advertising at least once a day), gaming was highlighted as a powerful way of interacting with food adverts in the qualitative research, in particular among male participants.

One example that was called out in the qualitative research was Burger King's involvement with FIFA. The brand sponsored the football club Stevenage FC (a professional association football club that competes in League Two) in real life to get their brand sponsorship into the video game FIFA. They also worked with influential gamers to make Stevenage FC a top team in the virtual world. Their shirt sponsorship of the team was seen by millions of FIFA players without the cost of sponsoring a premiership team in the physical world:

“ Whilst playing FIFA 21, I faced a team called Stevenage who are sponsored by Burger King so they have their sponsor in the game. Stevenage became the most played team of FIFA 20, last year's game, because of the Burger King sponsor. This annoys me because people don't realise how they're being influenced. ”

Male, 16-19



Placement of Burger King's logo on Stevenage FC shirt in FIFA video game



Cadbury has several football club partnerships

Beyond gaming, sport is also an area that resonated with male participants.

While only 13% of all survey participants reported that they are likely to pay attention to food and drink messaging attached to a sporting event, this format is nearly twice as likely to resonate with male participants (19%) than with females (9%).

In the qualitative research, the ability of food and drink sponsorship to tap into celebratory moments associated with sporting success was highlighted by participants.

“ This advert made me feel that I should celebrate England coming so far in the Euros with food. It made me think of everyone being happy and all my football friends. It made me want to order food or go to the pub. I would like to see more adverts like this. I thought of my football friends and us wearing our tops on Sunday. ”

Female, 13-15

Sports sponsorship is currently out of scope of any kind of existing or planned regulations on unhealthy food and drink advertising and represents a significant loophole where brands can engage with young people in a powerful way.

6: There is mixed understanding among young people of how their data is used by brands

The targeting of adverts already takes place on TV (e.g. during certain programmes) and in the out-of-home context (e.g. on certain roadside adverts or neighbourhoods). But the digital environment allows brands to take targeting to a much more granular approach and target individuals based on their online activity such as purchases or engagement with certain topics.

Young people are largely aware that their online activity influences what adverts they are served but there is less awareness of the exact ways companies collect their details or use data to target them. The quantitative survey results show that teens are largely aware that the adverts they see are personalised in some way, with only one in five participants (20%) thinking that the adverts they see are random. There is more awareness about demographic targeting than about the use of their behavioural data that's collected online and offline: 42% think they are targeted with certain adverts because of their demographics, 29% because of their behaviour on a platform or website, and only 22% think so because of their behaviour offline.

Lower socioeconomic groups are less aware of how companies use their data than higher socioeconomic groups, which may make them more vulnerable. In the survey, when asked why they are served less healthy food and drink adverts 42% of participants from C2DE backgrounds selected 'I don't know' or 'It's random', compared to only 29% of participants from ABC1 backgrounds.

Similar findings again emerge when comparing socio-economic groups: participants with an ABC1 background are more likely to be aware of the use of all three types of data usage from advertising than those with a C2DE background (47% of ABC1 participants are aware of demographic targeting versus 37% of C2DE participants, 33% versus 25% are aware of targeting based on their behaviour online, and 26% versus 18% of targeting based on their behaviour offline).

The qualitative research provides some insight into those young people that are more aware of how their data is being used:

“ I believe I am receiving these adverts due to the fact that through some technological ‘cookies’, Instagram has worked out I have made purchases from Joe & the Juice and have downloaded student discount apps like student beans already. ”

Female, 16-19

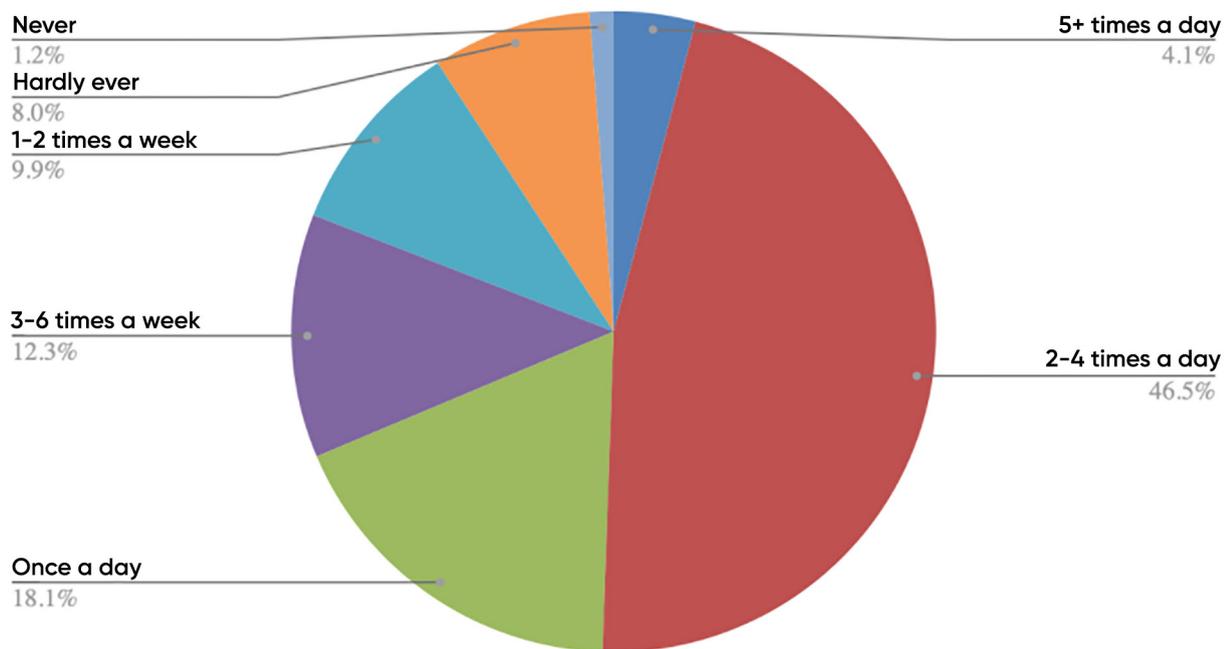
“ I think I am being served content like this because I have the Costa Coffee app and therefore Instagram may know that I am interested. I would say I see less drink adverts than food with it being around three times per day however food is more frequent. ”

Female, 13-15

7: Young people report daily exposure to less healthy food and drink advertising, but actual exposure is likely to be higher than what is self-reported

Participants in the quantitative survey were asked to estimate how often they think they see adverts for less healthy food or drinks. Seven out of ten participants (69%) reported seeing them at least once a day, with an average of twice a day among all participants (see Graph 3). Recall among females was higher than males with 72% reporting seeing less healthy food and drink advertising at least once a day compared to 62% of males.

Graph 3: Self-reported frequency of exposure to less healthy food/drink advertising, all participants



Question: How frequently do you think you see less healthy food/drink advertising? (This can be anywhere, from online, TV, on the street etc.) (Please select one answer). N = 1001

There were marginal differences in self-reported frequency of exposure between the different socioeconomic groups, with 72% of ABC1 participants reporting seeing less healthy adverts at least daily, compared to 64% of C2DE participants. Interestingly this finding contrasts with other evidence showing that young people from lower socio-economic groups have higher exposure.

For example, research found that more disadvantaged groups were more likely to report exposure than the least disadvantaged group.¹¹ Some of these differences may be down to differing perceptions of what is 'less healthy food' discussed further in section 9 as well as the limitations of self-reported recall.

¹¹ Yau A, Adams J, Boyland EJ, et al. Sociodemographic differences in self-reported exposure to high fat, salt and sugar food and drink advertising: a cross-sectional analysis of 2019 UK panel data. *BMJ Open* 2021;11:e048139. doi:10.1136/bmjopen-2020-048139

There was also a difference seen in exposure by ethnicity with 75% of respondents from a white ethnic group seeing less healthy food and drink advertising at least once a day compared with 57% of non-white participants. However care needs to be taken with this finding, due to the small sample size of respondents identifying as being from a non-white ethnic background.

The qualitative research can't be used to provide a robust estimate of less healthy food and drink advertising exposure due to the limitations of the task-based approach and the small sample size of 50 participants. However the majority of participants captured multiple food and drink adverts across each of the tasks which suggests a significantly higher exposure than reported in the quantitative survey.

Young people shared how they don't often notice less healthy food and drink adverts and participating in the study prompted to notice them more:

“ Wow, it's mad, isn't it! I didn't notice all that many at first. It really shows us that we are exposed to more than we think. It's like we have gotten used to junk food advertising that it's just normal to see. ”
Female, 16-19

8: Out-of-home food advertising dominates the advertising seen by young people

Across the three qualitative research tasks that involved participants recording advertising exposure, 164 food and drink adverts were identified.

These can be broken down into the following categories, aligned to Office for Health Improvement and Disparities sugar and calorie reduction programme categories which identify the food and drinks associated with children's excess calorie and sugar intake.

- Alcohol: 5 (n/a)
- Biscuits: 3 (sugar reduction category)
- Brand advert: 21 (n/a)
- Cakes: 6 (sugar reduction category)
- Cereals: 2 (sugar reduction category)
- Chocolate confectionery: 10 (sugar reduction category)
- Crisps and savoury snacks: 4 (calorie reduction category)
- Ice cream: 8 (sugar reduction category)
- In home main meal: 3 (calorie reduction category)
- In home meal centre: 12 (calorie reduction category)
- Out-of-home main meal: 49 (calorie reduction category)
- Out-of-home starters, sides, small plates: 6 (calorie reduction category)
- Soft drinks: 24 (sugar reduction category)
- Sweet confectionery: 3 (sugar reduction category)
- Sweetened milk-based drinks: 8 (sugar reduction category)
- Unsweetened juice: 1 (sugar reduction category)

A third of the adverts recorded (33%) were for out-of-home food, such as pizzas, burgers, muffins and other types of fast food. This was almost double the amount of the next most popular category of soft drinks, which accounted for 15% of the adverts recorded.

Additionally, of the 21 brand adverts captured, 17 were for out-of-home outlets or food delivery platforms, showing the dominance of the out-of-home sector in adverts seen by young people. Just one advert recorded, featuring salad leaves, was for whole fruit or vegetables.

Imogen, your discount is still available

Uber Eats



£10 off your first 5 orders

when you spend £15 or more.*

Order now →

How to redeem your promotion

1. Open the Uber Eats app, your offer is **already there** waiting for you.

Email from Uber Eats



Advert from Costa Coffee

Food sold by fast food outlets tends to be less healthy than food prepared at home,¹² so this type of advertising constantly being centre stage is bad news for young people's health.

It is also worth noting that participants were exposed to adverts for alcoholic products despite the regulations in place to protect underage audiences.

“ I seem to be getting a lot of adverts for alcoholic drinks at the moment in the evening. ”
Female, 16-19

“ This vodka advert on my Instagram annoys me, as they are targeting u18s. ”
Male, 16-19

“ The content made me feel kind of upset that I wasn't 18 already because of the alcohol and the places looked really nice, however the brunch places looked amazing, I would definitely go to the restaurant because it was in London and close to me. ”
Female, 16-19

Another trend revealed by the qualitative research is the promotion of plant-based alternatives by brands that are primarily associated with meat-based products. The qualitative research highlighted a positive sentiment towards the products and efforts from some young people to try to include them in their diet:

“ It seems to be for vegetarian substitutes for meat, which I'm trying to eat more of. ”
Female, 16-19

“ I've consciously been trying to make what appears on my feeds healthy or plant-based. ”
Female, 16-19

¹² Jaworowska A, M. Blackham T, Long R, et al Nutritional composition of takeaway food in the UK. *Nutr Food Sci* 2014;44:414–30.doi:10.1108/NFS-08-2013-0093

9: Young people have varying perceptions of the healthiness of food and drink brands and products

At the brand level, the survey suggests that young people perceive out-of-home outlets that generally offer fast food to be less healthy. When asked what brands come to mind when thinking of less healthy food/drink brands, the top three mentioned were McDonald's (mentioned by 81% of respondents), KFC (mentioned by 51% of respondents) and Burger King (mentioned by 39% of respondents). Similarly, when asked what are their favourite brands that they would deem as being less healthy, the top four were McDonald's (59%), KFC (32%), Subway (12%) and Burger King (11%). Currently there is no robust way of defining whether a particular brand can be assessed as healthier/ less healthy based on its product portfolio and/or sales.

Additionally, the survey suggests that young people's perceived healthiness of individual food and drinks at the product level varies. Participants in the quantitative survey were shown five adverts featuring food and drink products. They were asked to select the adverts they think promote less healthy food or drinks.

- A Starbucks ad showing their 'tie-dye' frappuccino: Identified by 57% as less healthy
- A Burger King ad showing plant-based burgers: Identified by 27% as less healthy
- A Deliveroo ad showing Tacos: Identified by 37% as less healthy
- A McDonald's ad showing french fries: Identified by 80% as less healthy
- A Subway ad featuring professional boxer Anthony Ogogo promoting a variety of sandwiches that are described as 'low fat', each with details on the amount of calories they contain: Identified by 25% as less healthy



The majority of respondents thought the McDonald's advert was promoting less healthy food (supporting other findings that young people consider McDonald's to be a less healthy brand generally). There was less consensus about the other adverts with 57% considering the frappuccino – which contains 58g of sugar in a grande serving (nearly double an adults' recommended daily limit) – to be less healthy. Less than a third considered the Burger King plant-based burgers to be unhealthy, highlighting the potential 'health-halo' of plant-based products suggested in the qualitative research.

The findings were generally consistent between males and females, with the exception of the Subway advert which was considered by 27% of males to show less healthy foods compared to 19% of females.

There were notable differences in the perception of two particular adverts by socio-economic group. The Starbucks frappuccino advert was likely to be judged as less healthy by 61% of ABC1 participants compared to 52% of C2DE participants. The Burger King vegan burger adverts were classed as less healthy by 33% and 22% of ABC1 and C2DE participants respectively. Further research could help uncover if these products are generally perceived as healthier by lower socio-economic groups.

These findings also highlight the differences in self-reported identification of less healthy products which could help explain the low reported exposure to less healthy advertising in the quantitative survey.

Conclusion and recommendations

Advertisers have an extraordinary and ever-evolving range of tools and tactics at their disposal when it comes to marketing less healthy food and drink. This research suggests the tactics are highly effective. Not only does advertising ensure less healthy food is centre-stage in young people's minds, but it activates cravings and influences purchases by tapping into excitement around new products and offering perceived value through price promotions served directly to young people.

This research underlines the vital importance of planned new restrictions to protect children and young people from HFSS food advertising – it is clear that advertising is a ubiquitous part of young peoples' lives and they are frequently exposed to a variety of influential marketing tactics across a range of channels. It is clear that the new restrictions must be fully implemented without any further delays.

However, the research also exposes areas where the new restrictions do not go far enough, creating loopholes that will be exploited by food businesses to continue to spotlight unhealthy food and drinks. It is clear that businesses are already very effectively using brand advertising to drive desire and purchasing and their own media channels to create a direct relationship with young people. These are likely to increase as restrictions on paid media come into effect along with other marketing tactics outside the scope of any regulation, such as sports sponsorship.

This research adds to the growing evidence for how pervasive and persuasive junk food marketing is in the lives of young people. With new formats and tactics emerging especially on digital channels, advertisers will always find loopholes no matter how strict the legislation is. Bold and ambitious steps are therefore needed to protect the health of young people.

- The Government must fully implement the new restrictions on advertising unhealthy products (classed as high in fat, sugar or salt) on TV and online without any further delays or watering down. In addition:
 - The Government should publish and commit to a timetable for implementation to be fully accountable.
 - Implementation guidance produced by the frontline regulator must be clear and robust and informed by evidence to prevent loopholes and weak points emerging.
- Policy must stay abreast of the rapidly evolving marketing space. The Government should continue to engage with academics, marketing experts, NGOs, young people, industry and other stakeholders to monitor the loopholes, exemptions and areas currently out of scope that will allow brands to influence young people. The Government should review and refine the policy to ensure it achieves its objectives of protecting children from harmful advertising.

Future policy should include:

- restrictions on brand advertising by food and drink brands that are associated with and/or predominantly sell less healthy food and drinks
 - restrictions on use of owned media (including direct emails, messages and app alerts) to target young people with price promotions on less healthy food and drinks
 - restrictions on sports sponsorship including regulation to ensure that only healthier food and drink products can be associated with sports, with robust new restrictions on any kind of sports-based marketing of unhealthy products and brands.
- Food and drink companies should shift their marketing focus to healthier options ahead of the new regulations coming into force and bring in stricter controls to stop targeting children and young people via food delivery apps or via their owned media channels.
- Young people deserve a better understanding of how their data is being used to influence what they see. Brands should provide transparent information about how data is collected and used for targeting.

Strengths and limitations

1. The format of the digital diary allowed the capture of the exposure and opinions from people in-the-moment, rather than at a later point as in interviews or surveys.
2. The combination of the quantitative survey with the qualitative research was important and helpful to validate themes with a larger sample.
3. However, capturing behavioural data in a survey has its limitations: answers are based on self-reported behaviour which might vary from actual behaviour and the research has shown that the definition of what is unhealthy is subjective, which can bias the results.

Parties involved

Public Health England:

The research was commissioned, and part funded, by Public Health England (PHE) in 2020. Officials, and relevant work, transferred from PHE to the Office of Health Improvement and Disparities (OHID), part of the Department of Health and Social Care (DHSC) on 1st October 2021.

OHID focuses on improving the nation's health so that everyone can expect to live more of life in good health, and on levelling up health disparities to break the link between background and prospects for a healthy life. Amongst other health priorities, OHID takes action on the biggest preventable risk factors for ill health and premature death including obesity.

About Impact on Urban Health:

Impact on Urban Health is an urban health foundation exploring how living in cities impacts people's health. While they focus our efforts in inner-city London, working in areas which experience some of the widest health inequalities in the UK, they seek to generate evidence and learnings which can benefit people in cities across the country and around the world.

Access to healthy food in the UK is incredibly unequal and our chances of accessing healthy food at an affordable price depend on where we live. Many urban areas with a high proportion of families living on a lower average income are flooded with unhealthy food options. Impact's 10-year Children's Health and Food programme coordinates efforts from different organisations and individuals to make simple changes in the places where families spend time purchasing and consuming food. It has a particular focus on transforming what's available in schools, nurseries and high streets. Impact also invest in food ventures, and strategic communications projects like their reframing work to support conditions for food environments to change.

About Bite Back 2030



Bite Back 2030 is a youth-led movement working to transform the food system to put child health first. That means healthy schools, healthy screens and healthy streets for every child, no matter where they live. Our young people are campaigning for change across England. We have 100 incredible young campaigners based across the UK, alongside 3,000 young people from 250 schools and youth clubs who are engaged through our School and Community Food Champions programmes.

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