FUEL US DON'T FOOL US

OUT-OF-HOME

#2 **Click-bait vs children's health:** How are big food chains exploiting loopholes to promote junk food on social media?

BITE BACK

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FOREWORD



"Every young person can relate to the feelings of fatigue and hunger after a long school day. As if by magic, the Snapchat notification appears on my phone quicker than my friends text me - a fast food brand, sending me a snap of their newest burger. It feels like we are being taken advantage of in the fight against junk food, which targets us through trends and hashtags. Social media corporations need to be held accountable, because protecting child health shouldn't be an option - it should be standard."

SIENNA, 17



"What's clear from this research is that Big Food is smart, the fact that these companies are able to use social media to market unhealthy products despite the new online and TV advertising restrictions proves these companies are prioritising their profits over the health of our generation. With such mass followings, Big Food companies ultimately have a responsibility: but our research shows over 70% of their posts feature unhealthy products. Right now, I don't think that we can trust Big Food - and I don't think Big Food, or the Government, understand the magnitude of this issue. I urge the Government to expand the advertising regulations to protect young people from this kind of marketing on social media. Big Food companies must be accountable for their role in the fabric of youth culture and protecting our health."

ZAINAB, 19



"Digital social spaces are supposed to be a safe space for expression but the growth of online junk food marketing has shifted the online world from a place of creativity and belonging to a monetized bombardment of unhealthy products. Protection is critical in ensuring that young people not only have a place to thrive socially but also a place that prioritises all elements of our wellbeing. Digital spaces have the potential to be a great tool to facilitate conversation regarding the health of generations to come and spotlight healthy products. Strengthening regulation will allow the next generation to flourish rather than continue to suffer."

ANNA, 19

EXECUTIVE SUMMARY

Since 2024, Bite Back's Fuel Us, Don't Fool Us campaign has been shining a light on the actions of the food giants and their influence on children's food environments. Right now, children have the odds stacked against them when it comes to health. Over a third of 10-11-year-olds leave primary school at risk of food related ill health in their future.[1] The causes are multifaceted, but a food environment flooded with unhealthy products and relentless marketing is a key driver.

5th January 2026 marked a significant milestone – the Government implemented the Less Healthy Advertising Regulations across TV and online media. It was a moment Bite Back youth activists campaigned for over many years and we welcomed it as a positive step towards ripping down the wallpaper of junk food advertising that surrounds young people every day.

But the celebrations were muted – over the eight years since the policies were first proposed by the Government, they were severely delayed and watered down, and important exemptions remain, particularly outdoor spaces and owned media channels. In fact, **owned media was originally included in the 2020 consultation on the online advertising restrictions, but later dropped.**[2] In 2025, Bite Back partnered with the University of Liverpool to explore the prevalence of high in fat, sugar and/or salt (HFSS) outdoor advertising in England. We found that McDonald's dominated and almost all of its outdoor ads promoted HFSS products.

This time, we set out to understand how Big Food chains in the UK use their owned (specifically, social) media platforms to continue marketing junk food and building brand affinity with young people.

The top 10 out-of-home businesses that appeal to young people.

BURGER KING · Domino's Pizza · KFC · PRET · SUBWAY · GREGGS · Nando's · COSTA COFFEE

[1] NHS Digital. (2025). National Child Measurement Programme, England, 2024/25 School Year
[2] https://www.gov.uk/government/consultations/total-restriction-of-online-advertising-for-products-high-in-fat-sugar-and-salt-hfss/introducing-a-total-online-advertising-restriction-for-products-high-in-fat-sugar-and-salt-hfss#objective-of-consultation

KEY FINDINGS:

1 **Collectively, the top 10 have a large following on social media, with more than 5 million followers across their UK Instagram and TikTok accounts at the time of analysis.**

a. This doesn't even begin to capture the global reach of these businesses on social media – of the six businesses with separate global accounts (official social media handles based in neither the UK or any other country), the total follower count exceeds 43 million.

2 **The average proportion of food posts that featured an HFSS item on Instagram was 71%, compared to 24% of posts that featured a non-HFSS item. This was similar on TikTok, with 73% of food posts featuring an HFSS item compared to only 25% of posts featuring a non-HFSS item.**[3]

a. Nearly all of Greggs' food posts featured an HFSS item – 95% of food posts on Instagram and 100% of food posts on TikTok.

3 **Four out of every five posts by the top 10 (80%) featured themes, language or trends likely to appeal to young people. KFC was the standout with 100% of its posts using this tactic.**

a. KFC had the highest number of followers and posts across Instagram and TikTok, with 1.5M collective followers across both UK-based accounts.

b. KFC also had the highest levels of engagement across both platforms, by far – its average number of likes per TikTok video was 140k and its average number of comments per TikTok video was 2k.

4 **Big Food chains frequently deploy a creative menu of tactics to appeal to young people including using nano-influencers, which serve to build parasocial relationships with a brand's follower base, communicating in Gen Z/ Alpha language, hopping on viral social media trends and building a 'meme-able' virtual world, inclusive of junk food-based characters, merchandise lines and influencer collaborations.**

a. Businesses are therefore capitalising on adolescents, who are already more vulnerable to social media marketing, as channels for furthering their reach – in a sense, turning young people into marketing platforms.

[3] The remaining food posts (5% of Instagram and 2% of TikTok posts) were excluded from nutrient analysis – see methodology.



More research is needed to understand the impact of marketing through different types of media on the health of children and young people. But the wider evidence base paints a clear picture of Big Food companies using their creativity and power to promote unhealthy products. Bite Back's previous research[4] found that:

- 78% of the top 10 manufacturers' food products that use packaging to appeal to children are classed as unhealthy.
- The majority (57%) of outdoor adverts for food and drink promote products high in fat, sugar or salt.
- In 2024, the top 25 food and drink spenders spent £418 million on outdoor advertising in the UK. This included McDonald's, PepsiCo, KFC, Coca-Cola, Mars, Mondelez, Unilever, Ferrero and Nestlé.
- Big Food companies sell and market to children and young people through schools using a range of tactics.

[4] Bite Back (2024). Fuel us, don't fool us: Reports 1-6

RECOMMENDATIONS

ACTIONS FOR GOVERNMENT

The Government should introduce measures that will incentivise change in the sector and protect young people from a flood of unhealthy food through the following actions:

1. End all HFSS advertising by the end of this Parliament. There are some key steps that can be taken more immediately, including tightening the TV/ online restrictions, particularly by closing the brand exemptions, expanding to cover outdoor advertising (where the issue is really inequitable), and applying the updated Nutrient Profiling Model 2018 to existing policy.

2. Explore ways to limit other forms of unhealthy marketing including through owned social media accounts, digital platforms that are not yet fully addressed by existing restrictions (e.g. videogame livestreaming), direct digital marketing and sports sponsorship, for example through commissioning research.

3. Implement the Healthy Food Standard, requiring large food businesses to meet mandatory targets to improve the healthiness of their sales. Legislation establishing the necessary powers to collect data, set the mandatory target, and define enforcement mechanisms must be introduced and passed before the end of this Parliament. Applying the updated NPM 2018 to policy must not delay implementation of the Healthy Food Standard.

In addition, as part of the current Health and Social Care Committee's inquiry into food and weight management, we call on the Committee to include the above recommendations in its final report to the Government.

ACTIONS FOR BUSINESSES

Given the growth of the out-of-home sector, the industry needs to take responsibility for ensuring its influence on young people's diets is a positive one. Businesses should shift sales to healthier products by setting a health sales target and publish transparent reporting on progress every year.

This should be supported by phasing out marketing of products that are high in fat, salt or sugar (HFSS). This should include making sure influencers they are partnered with understand the advertising restrictions and that any commissioned content follows the letter and spirit of the restrictions. Businesses should not engage in any activity to attempt to delay or weaken Government public health policies.

Social media platforms also have an important role to play. Policy development is needed, but one option could be to set an age check for under-18s for the social media accounts of unhealthy food and drink brands. And social media platforms should not be permitted to serve organic posts from those unhealthy brands on the "Explore" or "For You" pages.



INTRODUCTION

Big Food giants shape the food environments that young people grow, live and learn in, with massive implications for health. Junk food marketing has become our cultural wallpaper – it's inescapable, even in the privacy of our home.

Digital environments are integrated into daily life and social media provides a platform for young people to connect and participate in the world. However, social media also exposes young people to a flood of junk food marketing, creating a system which prioritises commercial interest above child health. Young people have a right to participate in the digital world without constantly being bombarded by marketing for unhealthy products.

The Government paid attention when Bite Back's young people asked for an end to junk food advertising – the long-delayed restrictions on less healthy food advertising on TV after 9pm and online at all times came into force on 5th January 2026. This is good news for children's health, but it isn't enough.

The regulation has significant loopholes, including brand advertising and other digital spaces, and it doesn't cover street advertising like billboards and bus stops. New analysis by Nesta found that the omission of outdoor advertising is significant, given the scale and growth of spend on this channel, and the risk of displacement of spend into it following implementation of restrictions: whilst TV food and drink advertising spending has fallen by 40% in real terms since 2004 (from £1.4 billion to £847 million), outdoor advertising has expanded substantially, rising from £197 million in 2004 (in 2024 prices) to £651 million in 2024, and by 59% between 2018 and 2024 (i.e. since the recent restrictions were first announced). Nesta estimates that the current TV and online restrictions will affect 8% of food and drink advertising spend, dropping down to 1% when factoring in expected displacement to non-restricted media channels and from product to brand advertising.[5]

In the years of industry lobbying for continued delays, food and drink brands have been able to use this time to switch up their tactics, focusing on unregulated spaces. This means they have continued to bombard young people with junk food marketing and build brand loyalty – following the letter but not the spirit of the rules put in place to protect children's health.

[5] Nesta (2026) Mind the gaps: Why restrictions on less healthy food and drink advertising fall short https://media.nesta.org.uk/documents/Mind_the_gaps_-_full_report.pdf

DIGITAL MEDIA

Digital media can be classified as paid, earned or owned.[6] Owned media, the focus of our research, comes straight from the source – this is the (non paid for) content created and controlled by a business, posted to its own social media account, website or app.

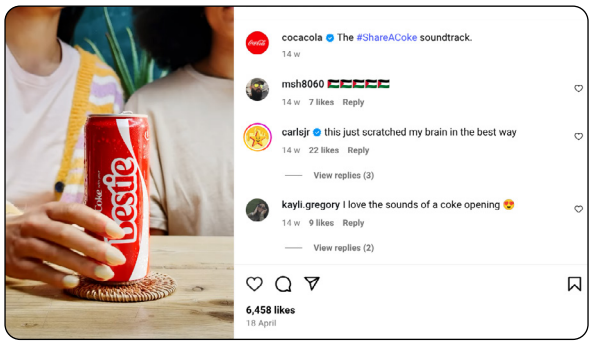
Paid media includes adverts that a business has purchased, such as social media or online display ads, and is often used to promote owned media, for example by boosting social media posts (i.e. an owned media post to a business's social media account can become paid media if it pays to boost the post to a targeted audience). Earned media is organically generated and shared by followers, but can be instigated by businesses through interactive marketing campaigns, such as Coca-Cola's viral 'Share a Coke' campaign (see Box 1). Campaigns considered by the industry as 'most successful' work across all forms of digital media.[7]



[6] Boyland, E., et al. (2024). Unhealthy Food and Beverage Marketing to Children in the Digital Age: Global Research and Policy Challenges and Priorities. Annual Reviews 44:471-497. https://doi.org/10.1146/annurev-nutr-062322-014102
[7] Peterson, P. (2025). The B2B Marketer's Guide to Owned, Earned, and Paid Media in 2025. Sweet Fish. https://www.sweetfishmedia.com/blog/paid-earned-and-owned-media#:~:text=The%20power%20of%20integration%E2%80%94How,about%20it%E2%80%94without%20being%20asked

Box 1: Coca-Cola's 'Share a Coke' campaign[8,9]

Coca-Cola's familiar 'Share a Coke' campaign, which involves replacing the brand's logo with names on cans and bottles, was originally launched in Australia in 2011. The campaign was relaunched in the US in 2014, when the American business realised it was losing popularity among teens. The relaunch was a major success and resulted in 1.25 million more teens in the US drinking a Coke in the summer following the campaign. The latest iteration of this campaign was launched globally in 2025, more than a decade later, but still designed to engage young people – this time, Gen Z.



Owned Media

At the heart of this campaign was its use of owned media, in the form of personalised packaging and digital experiences. Coca-Cola relied on its social channels to promote the campaign and engage followers.



Paid Media

Paid media was used to boost the digital campaign, through the promotion of video creatives across TV, social media and out-of-home advertising.



Earned Media

The success of the campaign depended on user engagement through earned media. Personalisation drove organic sharing as people posted their named bottles on social media, tagged friends and used #ShareaCoke.

[8] Mendoza, L. (2015). US Coca-Cola: Persuading teens to 'Share a Coke'. Starcom Mediavest Group. https://www.mrs.org.uk/pdf/US_COCA_COLA_-_FINAL_TWO.pdf
[9] Kelly, C. (2025). Coke refreshes 'Share a Coke' to reach Gen Z with digital experiences. Marketing Dive. https://www.marketingdive.com/news/coca-cola-share-a-coke-campaign-refresh-gen-z-digital-experiences/743648/

SOCIAL MEDIA AS A COMMERCIAL PLATFORM

Social media offers food and drink businesses a platform to engage online users, collect user data and expand marketing reach, without having to pay for traditional advertising. Social media platforms supply content to users in exchange for their attention and data, which is then supplied to advertisers for a massive profit, in what can be referred to as the attention economy.[10] Because social media content is designed to be engaging and entertaining, marketing blends into users' feeds, blurring the line between organic content and advertising. This makes it difficult to identify, especially for younger social media users.[11]

It makes sense that food businesses would turn to social media to market their products and brand, especially in the context of evolving media use trends among young people. Over the past 10 years, the time adolescents spend watching TV has dramatically decreased relative to the increase in their time spent consuming digital media.[12] Traditional media marketing is still heavily invested in by the food and drink industry but big food brands report that digital marketing amplifies its impact – and at a much lower cost.[13,14] This may be because while TV advertising is largely passive, digital marketing encourages participation and engagement, leading to a snowball effect of content shared across social networks.[15] This is especially relevant for adolescents who may be more susceptible to peer influence[16] and make up a large proportion of big food businesses' social media account followers.[17]

[10] Sperry, B. (2024). A Law & Economics Approach to Social-Media Regulation. International Center for Law & Economics. https://laweconcenter.org/resources/a-law-economics-approach-to-social-media-regulation/
[11] van der Bend, D. (2025). Their feed and what they eat: the extent, nature and impact of social media food marketing targeted to adolescents. Open Research Newcastle. Thesis. https://hdl.handle.net/1959.13/1507281
[12] Harris, J., et al.(2020) Hooked on junk: Emerging evidence on how food marketing affects adolescents' diets and long-term health. Springer Nature. https://doi.org/10.1007/s40429-020-00346-4
[13] Harris, J., et al.(2020) Hooked on junk: Emerging evidence on how food marketing affects adolescents' diets and long-term health. Springer Nature. https://doi.org/10.1007/s40429-020-00346-4
[14] Nesta (2026) Mind the gaps: Why restrictions on less healthy food and drink advertising fall short https://media.nesta.org.uk/documents/Mind_the_gaps_-_full_report.pdf
[15] The Obesity Health Alliance (2020). An End to Junk Food Marketing Online: Policy Position. https://obesityhealthalliance.org.uk/wp-content/uploads/2020/11/Ending-junk-food-marketing-online-position-paper.pdf
[16] Harris, J., et al.(2020) Hooked on junk: Emerging evidence on how food marketing affects adolescents' diets and long-term health. Springer Nature. https://doi.org/10.1007/s40429-020-00346-4
[17] Rummo, P., et al. (2020). Examining the Relationship between Youth-Targeted Food Marketing Expenditures and the Demographics of Social Media Followers. Int. J. Environ. Res. Public Health. 17, 1631. 10.3390/ijerph17051631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RELEVANCE TO YOUNG PEOPLE AND THEIR HEALTH

The harm that social media poses to young people has become increasingly clear and relevant to global policymakers looking to protect their health. Following Australia's social media ban for under-16s, similar proposals have swept across Europe, Asia and the US.[18] In California, social media giants have been found liable in a landmark trial, after the jury ruled they designed their platforms to hook young users without concern for their well being.[19]

Often missing from this conversation is the commercialisation of young people by big food and drink businesses via social media platforms which are designed to meet the needs of these businesses, rather than to protect children. The UK Government launched a consultation on how to best protect young people in their digital environments[20] and the Children's Commissioner for England has called on the Government to restrict all advertising to children on social media, stating that "advertisements offer no benefits for children, and need to be removed from children's experience online."[21]

Big food and drink brands recognise the opportunity to build brand loyalty from a young age and tap into young people's purchasing power.[22] When young people share content with their peer networks, they essentially function as free marketing platforms. This is a double win for businesses because in addition to expanding reach, this tactic also boosts power, as peers are considered more trustworthy than brands.[23]

[18] Jahangir, R. and Hendrix J. (2026). Tracking Efforts To Restrict Or Ban Teens from Social Media Across the Globe. https://www.techpolicy.press/tracking-efforts-to-restrict-or-ban-teens-from-social-media-across-the-globe/
[19] Reuters (2026). Meta, Google lose US case over social media harm to kids https://www.reuters.com/legal/litigation/jury-reaches-verdict-meta-google-trial-social-media-addiction-2026-03-25/
[20] Department for Science, Innovation and Technology (2026). Growing up in the online world: a national consultation. https://www.gov.uk/government/consultations/growing-up-in-the-online-world-a-national-consultation
[21] Children's Commissioner (2026). A healthy influence? Children's exposure to appearance-changing products online. https://www.childrenscommissioner.gov.uk/resource/a-healthy-influence-childrens-exposure-to-appearance-changing-products-online/
[22] How can brands successfully reach teen consumers? The Insights Family (2022). https://theinsightsfamily.com/news/how-can-brands-successfully-reach-teen-consumers
[23] Gibs, J. (2010). Nielsen. The Value of Social Media Ad Impressions. https://www.nielsen.com/insights/2010/nielsenfacebook-ad-report/

The spotlight on unhealthy food in adolescents' digital environments is concerning for their health with extensive research linking food marketing and childhood obesity. [24] In the UK in 2016, nearly three-quarters (73%) of a sample of 1,000 13-17-year-olds reported following brands they like on social media.[25] In a study of teens from the US, the most common food brands engaged with were fast food (54%), followed by sugary drinks (50%), candy (46%), and snacks (45%)[26] and a global study of youth-targeted food marketing found that unhealthy food brands had more followers than healthy brands.[27] A study in Ireland found that adolescents were more likely to share posts for less healthy food compared to healthier foods[28] and research done by Cancer Research UK (CRUK) found that young people considered content featuring HFSS food entertaining, and even sought it out[29] – our findings explain this trend through revealing some of the tactics food businesses use to make their marketing content so appealing to young people.

[24] Norman J., et al (2016). The impact of marketing and advertising on food behaviours: evaluating the evidence for a causal relationship. Curr. Nutr. Rep. 5:139–49. DOI:10.1007/s13668-016-0166-6
[25] Boyland, E. and Tatlow-Golden, M. (2017). Exposure, Power and Impact of Food Marketing on Children: Evidence Supports Strong Restrictions. https://www.cambridge.org/core/journals/european-journal-of-risk-regulation/article/abs/exposure-power-and-impact-of-food-marketing-on-children-evidence-supports-strong-restrictions/E91B7F71A92C8EF4BDC21D099CD8B21D
[26] Fleming-Milici F. and Harris J.L. (2020). Adolescents' engagement with unhealthy food and drink brands on social media. Appetite. 146:104501. doi: 10.1016/j.appet.2019.104501
[27] Rummo, P., et al. (2020). Examining the Relationship between Youth-Targeted Food Marketing Expenditures and the Demographics of Social Media Followers. Int. J. Environ. Res. Public Health. 17, 1631. 10.3390/ijerph17051631
[28] Murphy, G., et al. (2020). See, Like, Share, Remember: Adolescents' Responses to Unhealthy-, Healthy- and Non-Food Advertising in Social Media. International Journal of Environmental Research and Public Health, 17(7), 2181. https://doi.org/10.3390/ijerph17072181
[29] Saunders A, et al. (2025). Cancer Research UK. Digital influence: Young people's exposure to the marketing of cigarettes, vapes, unhealthy food/drink and alcohol.

MARKETING TACTICS

Big food brands are masters of marketing – they work hard to increase the exposure and power of their social media by encouraging users to engage with and share their content (see Box 2). They employ many tactics to ensure their brand is recognised by as many people as possible and that consumers are influenced to purchase their products, in the short- and/or long-term. They do this through the use of hashtags and prompts to share, among others.

Box 2: Definitions (relevant to social media)[30]

EXPOSURE:	The reach (percentage of people in a target audience exposed) and frequency of (number of times an average person is exposed to) a social media post
POWER:	The extent to which marketing tactics achieve their objectives through the use of creative content and innovative strategies (power relating to young people has to do with using techniques which appeal to them – see Box 3)
MARKETING:	Any form of commercial communication that acts to promote a product or brand and is designed to increase the recognition, appeal and/or consumption of products
ADVERTISING:	A form of marketing, advertising includes the paid promotion of a product or brand

[30] WHO (2012). A framework for implementing the set of recommendations on the marketing of foods and non-alcoholic beverages to children. https://iris.who.int/server/api/core/bitstreams/ccd4809a-c7eb-4fb9-b5c3-fa6584fde3a4/content

In this research, we were most interested in tactics used to increase the potential of marketing to appeal to young people. WHO Europe consolidated evidence and built a framework to help identify digital marketing with the potential to appeal to children (see Box 3 - Bite Back adapted framework). The WHO review found that tactics with the potential to appeal to children were used more frequently to promote unhealthy foods and during school holidays.[31]

By using these tactics to appeal to young people, the marketing teams of big businesses build parasocial relationships with young people who engage with their content. One of the most prominent tactics for succeeding at this is the use of celebrities and influencers, which plays on the developmental need for peer acceptance among adolescents.[32] Research suggests that parasocial relationships with online characters increase children's perceptions and purchase intent toward the products they promote.[33]

Box 3: Tactics with the potential to appeal to young people – Bite Back adapted framework

- **Gifts/ incentives/ competition**
- **Presence of celebrities/ influencers**
- **Characters (brand equity, licensed, etc.)**
- **Child/ teen-like themes/ language/ trends**
- **Links to special days/ events**
- **Presence of animation, cartoons, music/ jingles, bright colours**
- **Nutrition or sustainability claims**

[31] WHO (2023). Policies to protect children from the harmful impact of food marketing: WHO guideline. https://iris.who.int/bitstream/handle/10665/370113/9789240075412-eng.pdf?sequence=1
[32] Harris, J., et al.(2020) Hooked on junk: Emerging evidence on how food marketing affects adolescents' diets and long-term health. Springer Nature. https://doi.org/10.1007/s40429-020-00346-4
[33] Lou, C. (2022). Social Media Influencers and Followers: Theorization of a TransParasocial Relation and Explication of Its Implications for Influencer Advertising. J Advert. 2022;51(1):4-21. doi:10.1080/00913367.2021.1880345

METHODOLOGY

This content analysis was carried out on Instagram and TikTok as the two social media platforms voted most relevant for young people in the UK by Bite Back Youth Board members. Big Food chains were selected as the focus of this research because initial scoping suggested the out-of-home sector was generally more active on social media than manufacturers (with some exceptions). An initial list of the largest businesses operating in the UK was compiled based on various revenue, sales and density data in 2024.[34] To identify which businesses are most relevant to young people, Bite Back Youth Board members selected the top 10 in terms of popularity and relevance to their lives – these are referred to as the 'top 10'. This list is further reinforced by the Beano Brains report on the coolest brands of 2025, which includes all the top 10, save for Pret (TikTok and Instagram also made the list).[35]

The official UK accounts for each business were identified by the presence of a verification badge (blue check mark) across both platforms (see Table 1). McDonald's Instagram account was the only account with private settings so was excluded from analysis - an example that shows brands can indeed already take steps to limit young people's exposure to unhealthy marketing.

Table 1: Top 10 official UK-based social media accounts

Business	Instagram handle	TikTok handle
Burger King	@burgerkinguk	@burgerkinguk
Costa Coffee	@costacoffee	@costacoffee
Domino's Pizza	@dominos_uk	@dominos_uki
Greggs	@greggs_official	@greggsofficial
KFC	@kfc_uki	@kfc_uki
McDonald's	@mcdonaldsuk	@mcdonaldsuk
Nando's	@nandosuk	@nandosuk
Pret a Manger	@pret	@pretamanger
Starbucks	@starbucksuk	@starbucksuk
Subway	@subway_ukireland	@subwayukireland

[34] The same businesses were used in this research drop for consistency with our Fuel Us, Don't Fool Us campaign.
[35] Beano Brain (2025). Coolest Brands 2025 - UK Mini Report

Content over a three-month period (15 November 2024 – 15 February 2025) was captured, including:

- Account information: number of followers/ posts shared over the three-month period
- Post engagement data: number of likes/ comments/ saves[36]

Temporary content, including stories and live videos were not included in this analysis. The timeframe was selected to account for a diversity of content over time. All posts spanning the three-month period were recorded manually via screenshot/ screen record over a two-day period in late February 2025.

A coding framework was adapted from WHO Regional Office for Europe Coding Guidance on Food Marketing Monitoring Protocols (V1 2023) to analyse the marketing power of each post. The framework was adapted to the UK context and to meet the research objective of identifying common methods of engagement with young people via social media. Bite Back youth board members consulted on the coding framework to ensure it captured the recognised mechanisms of youth appeal. Specific adjustments included:

- Combined child/ teen appeal for a more general 'potential to appeal to young people';
- Healthiness based on UK 2004/2005 Nutrient Profiling Model (NPM) rather than WHO NPM; and
- Tailored coding on power to focus more on youth appeal.

The content analysis was initially undertaken by the primary researcher. Each post was first analysed for general marketing power and then scored against seven criteria deemed to have the potential to appeal to young people (see Box 3). Following initial coding, a secondary researcher analysed a random sample of posts using the pre-defined coding guidelines (see Appendix 1) (total number of double-coded posts 151/736 – 20% based on general guidance).[37] Most coding results matched but where discrepancies were noted, the two researchers discussed until coming to a consensus.

[36] Number of saves per post available for TikTok only
[37] In each business's data spreadsheet, a random number was generated using Google to select a post and every 5th post preceding/ following it was coded by the secondary researcher.

Food and drink products were identified in each post and their nutrient score determined using the 2004/2005 UK NPM.[38] Posts were considered to feature an HFSS product if at least one product named or visualised in the post failed the NPM. Unidentifiable food products (e.g. a closed pizza box) were not included in the analysis; dried coffee, homemade recipes and seasonal products for which no information was provided were also excluded. Nutrition information per 100g and/or per portion was collected from company websites, or from a retailer website, if relevant and unavailable on the company website.

Bite Back's primary researcher originally calculated each score using the University of Leeds online NPM calculator. If foods scored four or more points, and drinks scored one or more points, they were classified as HFSS. NPM scores were calculated for all food and drink product categories, regardless of whether or not they are in scope of the government's HFSS marketing restrictions.[39] A secondary researcher calculated the scores for a random sample of products (again, 20%) to confirm the nutrient profiles independently; all additional products that were considered to potentially score on the border between HFSS/non-HFSS were also independently checked – final scores were agreed upon and requests for clarifications from businesses made where relevant. Each business was provided with the assumptions made and nutrient scores with the opportunity to provide clarifications/missing information (see Appendix 2).

[38] Department of Health (2011). Nutrient Profiling Technical Guidance.
[39] The 13 categories defined by the Government are: soft drinks with added sugar, savoury snacks, breakfast cereals, confectionery, ice cream & frozen yoghurt, cakes & cupcakes, sweet biscuits & bars, morning goods, desserts & puddings, sweetened yoghurt & fromage frais, pizza, potato products, and ready meals & breaded items.

LIMITATIONS

Consistent use of the pre-defined coding framework limited subjectivity; however, analysing social media posts for their potential to appeal to young people is inherently subjective. Due to limited capacity, not all posts were coded by two researchers – potential to appeal to young people should be considered for its trends, rather than used as a definitive scoring system. Because some content was captured over the 2024 Christmas period, many items featured were seasonal and therefore, the nutrient information was not available. This information was obtained where possible or confirmed with businesses, but some posts had to be excluded from the analysis where data was unobtainable.

This research was not designed to detect the proportion of followers who are under 16 but Ofcom reports that in 2024, 92% of 12-15 year-olds used social media[40] and a third of children aged 8–15 had a user age of 16 or older in the UK,[41] so it is reasonable to assume that under-16s make up a large proportion of the audience (especially in consideration of the tactics used by the top 10 to appeal to young people, discussed below).



[40] Ofcom (2024). Children and Parents: Media Use and Attitudes Report.
[41] YouGov/ Ofcom (2025). Children's User Age Wave 4. https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/online-research/keeping-children-safe-online/childrens-online-user-ages/2025-april/chart-pack.pdf?v=395531

RESULTS

EXPOSURE

Collectively, the top 10 have a large following on their UK-based social media accounts, totalling roughly 5 million followers across both platforms (see Table 2). Additionally, both TikTok and Instagram use an algorithm to curate content to individual users which they are most likely to engage with, based on user data – for example, if a user 'likes' a post from a social media influencer eating at Burger King, they may be more likely to see a post from Burger King appear on their Explore or For You Page. This means that the reach of a business's social media content will likely go much further than its followers.

Table 2: Number of followers* and posts (UK-based accounts) captured between 15 November 2024 – 15 February 2025

Business	No. Instagram followers	No. Instagram posts during content capture	No. TikTok followers	No. TikTok posts during content capture
Burger King	94.7K	43	297.2K	22
Costa Coffee	429K	32	148.1K	35
Domino's Pizza	228K	75	230K	49
Greggs	198K	44	130.5K	24
KFC	560K	80	927.9K	80
McDonald's	N/A	N/A	233.1K	15
Nando's	437K	26	237.2K	35
Pret a Manger	202K	36	5.5K	39
Starbucks	394K	23	213.4K	15
Subway	81.8K	35	42.3K	28
Total	**2.6M**	**394**	**2.5M**	**342**

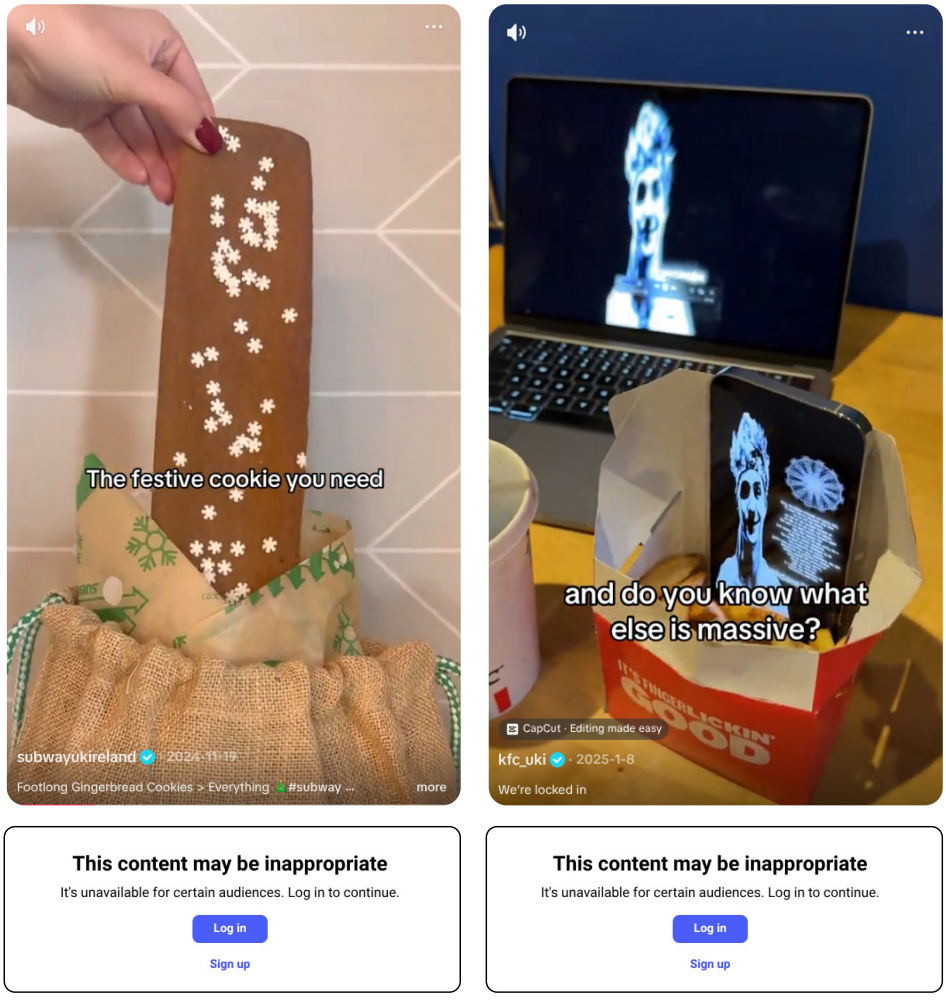
*Follower count from day of content capture

KFC had the highest number of followers and posts across Instagram and TikTok, with 1.5 million collective followers across both accounts. This is more than double the amount of followers than Nando's, which had the second highest follower count of 674K. KFC is widely recognised for its successful and 'unhinged' social media presence[42] – this is reflected in its massive following.

McDonald's was the only business to restrict its Instagram account to under-16s at the time of content capture. This means that a user would have to use an account registered as 16+ to view McDonald's Instagram content (its TikTok was not restricted). For this reason, McDonald's Instagram account was excluded from the analysis. However, as mentioned previously, evidence suggests that many young people have accounts registered as over 16 so while better than nothing, this still fails to sufficiently protect young people on social media.

Two individual Instagram posts – one from Subway and one from KFC (see Image 1) – were also restricted;[43] however the exact same posts were not restricted from TikTok. No accounts or posts were restricted on TikTok.

Image 1: Restricted Instagram posts from Subway and KFC which were unrestricted on TikTok



[42] McGuire, A. (2025) Whoever is running KFC's socials is unhinged (in a good way). Medium. https://anthonymcguire.medium.com/whoever-is-running-kfcs-socials-is-unhinged-in-a-good-way-bc37f1f4f859
[43] The primary researcher was not logged into an Instagram or TikTok account to capture the content.

POWER

The most frequent tactic used to increase the power of posts was the mention of a new product or limited time offer (302, 41%) (see Image 2). Surprisingly, the reference to low price or a price promotion was one of the least frequently used tactics (22, 3%); however this may reflect marketing literature which refers to Gen Z as skeptical of overly promotional tactics.[44] This tactic was used most frequently by Subway (see Image 3) – note the use of Gen Z/ Alpha language.

Table 3: Tactics used to increase power – count (%) of total posts (combined TikTok and Instagram posts)

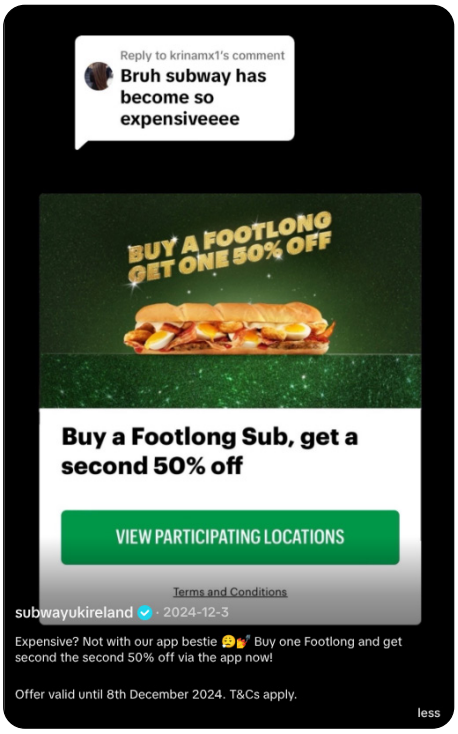
Business (total posts)	New product/ limited time offer	Prompt to purchase/ order	Reference to app/ loyalty programme	Brand partner -ship	Reference to low price or price promotion	Sponsor-ship
Burger King (65)	14 (22%)	11 (17%)	4 (6%)	6 (9%)	3 (5%)	0 (0%)
Costa Coffee (67)	31 (46%)	9 (13%)	13 (19%)	4 (6%)	3 (4%)	3 (4%)
Domino's Pizza (124)	32 (26%)	9 (7%)	0 (0%)	5 (4%)	0 (0%)	0 (0%)
Greggs (68)	28 (41%)	11 (16%)	7 (10%)	2 (3%)	5 (7%)	0 (0%)
KFC (160)	68 (43%)	14 (9%)	0 (0%)	6 (4%)	0 (0%)	0 (0%)
McDonald's (15)	5 (33%)	4 (27%)	2 (13%)	1 (7%)	0 (0%)	0 (0%)
Nando's (61)	16 (26%)	3 (5%)	1 (2%)	1 (2%)	0 (0%)	3 (5%)
Pret a Man-ger (75)	36 (48%)	13 (17%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Starbucks (38)	24 (63%)	4 (11%)	2 (5%)	0 (0%)	0 (0%)	0 (0%)
Subway (63)	48 (76%)	13 (21%)	4 (6%)	11 (17%)	11 (17%)	4 (6%)
Total - 736 (%)	**302 (41%)**	**91 (12%)**	**33 (4%)**	**36 (5%)**	**22 (3%)**	**10 (1%)**

[44] Schaefer, A. (2025). Sprout Social. https://sproutsocial.com/insights/gen-z-social-media/#:~:text=Topicals,and%20deeply%20understands%20their%20nuances.&text=%E2%80%9CI'm%20interested%20in%20how,ll%20reward%20you%20with%20loyalty.

Image 2: Burger King posts about its launch with Innocent Drinks using engagement tactics and strong youth appeal



Image 3: Subway promoting its Big Breakwich sub on a buy one, get one 50% off promotion



ENGAGEMENT

Roughly a third of all posts across both platforms included at least one prompt to engage (i.e. like, comment, share) (217; 30%) and/ or at least one hashtag (236; 32%). Only 8 (1%) were marked as an ad and 28 (4%) were marked as 18+ – all but one of these posts were for a game or competition.

Engagement is indicative of how effective content is because it captures the extent to which users are interacting with an account's posts via liking, commenting or sharing. TikTok has higher engagement rates than Instagram in general and our research reflected this – the average number of likes per post across all 10 businesses on TikTok was over 23K compared to 16K for Instagram posts (see Table 4). Similarly, the average number of comments per TikTok post across each business was 406, compared to 147 per Instagram post.

Table 4: Overall engagement figures

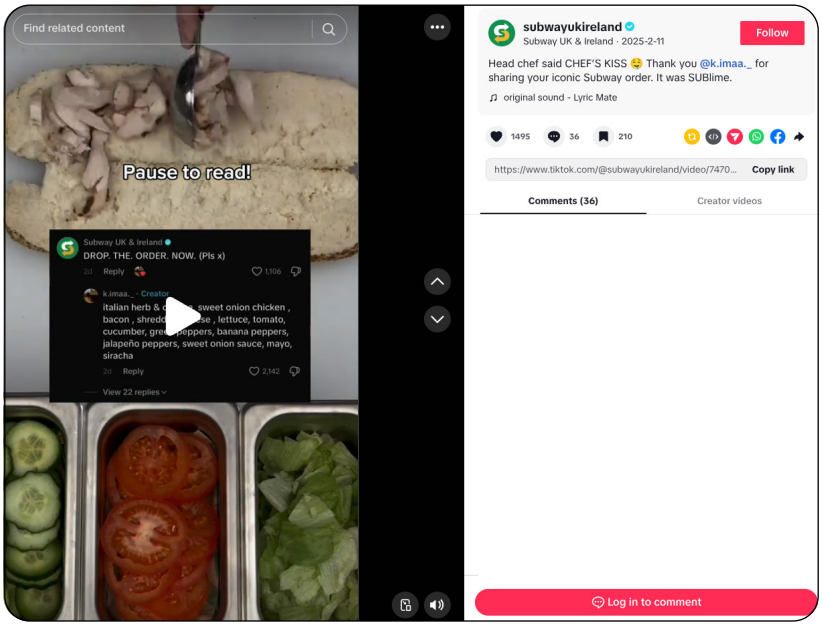
Business	Avg likes (TikTok)	Avg comments (TikTok)	Avg saves (TikTok)	Avg likes (Instagram)	Avg comments (Instagram)
Burger King	37,940	721	3,959	1,777	34
Costa Coffee	465	9	30	788	81
Domino's Pizza	16,472	424	2,055	17,267	288
Greggs	13,055	285	1,192	2,576	81
KFC	139,748	2,374	18,127	116,801	703
McDonald's	3,753	99	218	N/A	N/A
Nando's	6,808	57	262	3,780	58
Pret a Manger	9,306	23	154	669	13
Starbucks	1,098	9	112	1,622	41
Subway	3,619	61	249	903	29
Average	**23,226**	**406**	**2,636**	**16,243**	**147**

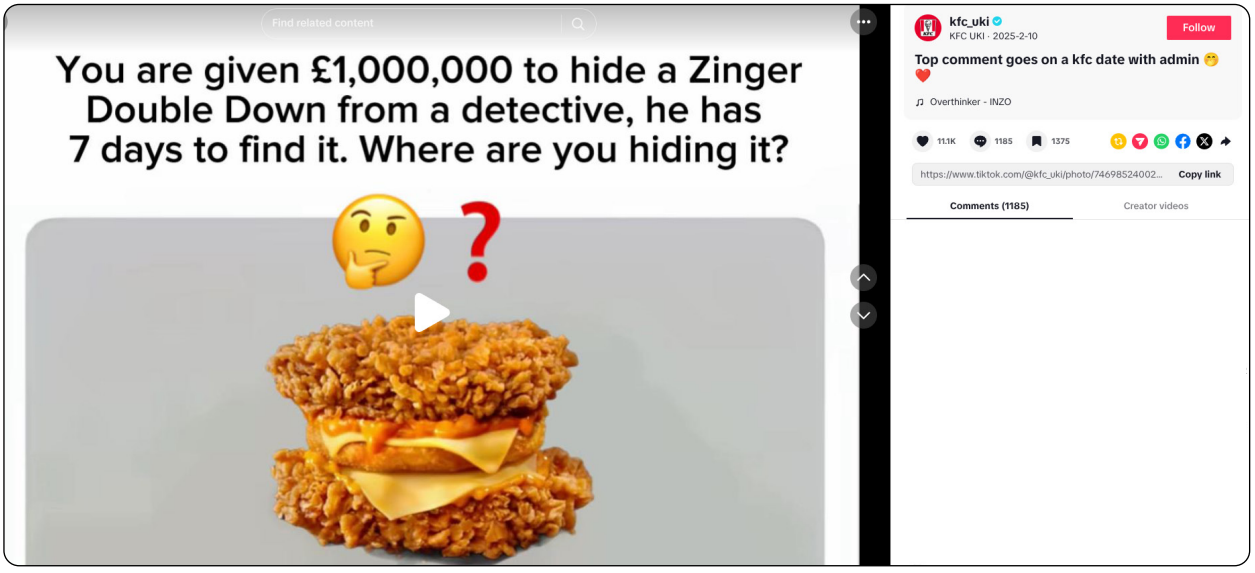
Schaefer, A. (2025). Sprout Social. https://sproutsocial.com/insights/gen-z-social-media/#:~:text=Topicals,and%20deeply%20understands%20their%20nuances.&text=%E2%80%9CI'm%20interested%20in%20how,ll%20reward%20you%20with%20loyalty.

KFC had by far the highest levels of engagement across both platforms – its average number of likes per TikTok video was 140K; the second highest was Burger King with 38K. Similarly, its average number of comments per TikTok video was 2K; the second highest was Burger King with over 700. It is important to note that some averages are skewed by outlier posts; for example, one KFC TikTok post had nearly 2 million likes compared to another with less than 500. It was beyond the scope of this research to determine whether these outliers were due to posts going viral organically or because they were paid to be boosted.

Box 4: Examples of brands directly engaging with followers







Left: Nando's integrating followers' comments into its product launch announcement.

Right: Subway recreating a follower's favourite order.
Bottom: KFC dedicating an entire post to one follower's comment.

HEALTHINESS



Collectively across both social media platforms, 736 posts were captured (some were posted to both Instagram and TikTok and are therefore counted twice). Of these, 594 (81%) contained an identifiable food or drink product. Of these food posts, 425 (72%) featured an HFSS item and 146 (25%) featured non-HFSS items; 23 food posts were ineligible for nutritional analysis (see methodology).

The average proportion of food posts that featured an HFSS item on Instagram was 71%, compared to 24% of posts that featured a non-HFSS item. This was similar on TikTok, with 73% of all posts featuring an HFSS item compared to only 25% of posts featuring a non-HFSS item. The proportion of posts that feature an HFSS item is also likely an underestimate because we were unable to include many items in our analysis, for which nutrient information is not publicly available from the businesses (see methodology)

Trends were broadly similar across TikTok and Instagram with all businesses featuring an HFSS item in at least half of their food posts, except Costa's Instagram, which featured an HFSS item in 28% of food posts; interestingly, this trend was reversed on its TikTok, which featured HFSS items in the majority of food posts (69%) and only featured non-HFSS items in 28% of food posts. Nearly all of Greggs' food posts featured an HFSS item – 95% of food posts on Instagram and 100% of food posts on TikTok.

Table 5: Total count and proportion of Instagram posts featuring an HFSS item (businesses listed from highest to lowest proportion of HFSS posts)*

Business	Total food posts	HFSS posts (%)	Non-HFSS posts (%)	N/A
Greggs	41	39 (95%)	2 (5%)	0
Domino's Pizza	55	48 (87%)	1 (2%)	6 (11%)
Nando's	22	19 (86%)	1 (5%)	2 (9%)
Burger King	33	26 (79%)	4 (12%)	3 (9%)
Subway	33	23 (70%)	10 (30%)	0
Starbucks	19	12 (63%)	7 (37%)	0
KFC	65	38 (58%)	27 (42%)	0
Pret a Manger	35	20 (57%)	12 (34%)	3 (9%)
Costa Coffee	25	7 (28%)	16 (64%)	2 (8%)
Total (%)	**328**	**232 (71%)**	**80 (24%)**	**16 (5%)**

*McDonald's excluded from analysis

Table 6: Total count and proportion of TikTok posts featuring an HFSS item (businesses listed from highest to lowest proportion of HFSS posts)

Business	Total food posts	HFSS posts (%)	Non-HFSS posts (%)	N/A
Greggs	19	19 (100%)	0	0
Domino's Pizza	33	31 (94%)	1 (3%)	1 (3%)
Nando's	27	24 (89%)	2 (7%)	1 (4%)
McDonald's	5	4 (80%)	0	1(20%)
Subway	26	19 (73%)	7 (27%)	0
Costa Coffee	29	20 (69%)	8 (28%)	1 (3%)
Pret a Manger	32	20 (63%)	11 (34%)	1 (3%)
Starbucks	13	8 (62%)	5 (38%)	0
KFC	64	38 (59%)	26 (41%)	0
Burger King	18	10 (56%)	6 (33%)	2 (11%)
Total (%)	**266**	**193 (73%)**	**66 (25%)**	**7 (2%)**

YOUTH APPEAL

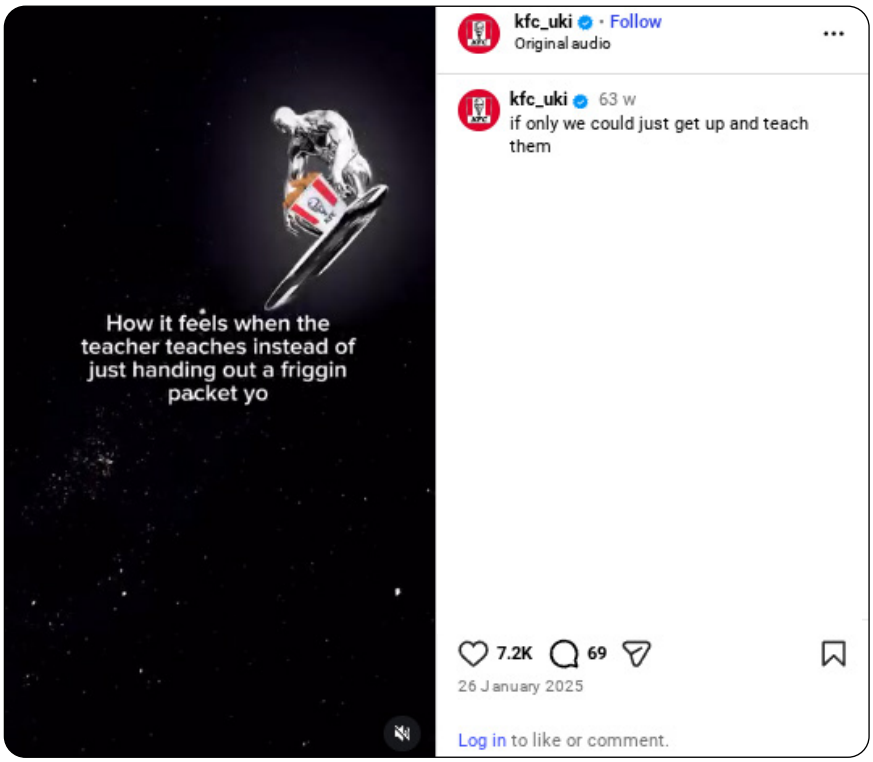
While this research could not capture the full extent of how many young people were exposed to or engaged with each social media post, it did investigate the potential of each post to appeal to young people, scoring each post against an established framework with seven identified tactics (see Table 7).

Table 7: Tactics used to appeal to young people – count (%) of total combined TikTok and Instagram posts (businesses listed from highest to lowest proportion of posts using child/ teen-like themes, language or trends)

Business (total posts)	Child/ teen-like themes, language, trends	Presence of animation, cartoons, music/jingles, bright colours	Links to special events/ days	Presence of celebrities/influencers	Characters (brand equity, licensed, etc.)	Gifts/incentives/ competition	Nutrition or sustainability claims
KFC (160)	160 (100%)	154 (96%)	62 (39%)	77 (48%)	99 (62%)	36 (23%)	0 (0%)
Nando's (61)	59 (97%)	43 (70%)	19 (31%)	17 (28%)	11 (18%)	5 (8%)	0 (0%)
Domino's Pizza (124)	114 (92%)	90 (73%)	70 (56%)	25 (20%)	10 (8%)	36 (29%)	0 (0%)
McDonald's (15)	13 (87%)	15 (100%)	8 (53%)	1 (7%)	6 (40%)	2 (13%)	0 (0%)
Greggs (68)	58 (85%)	42 (62%)	29 (43%)	16 (24%)	13 (19%)	9 (13%)	2 (3%)
Burger King (65)	49 (75%)	29 (45%)	14 (22%)	9 (14%)	9 (14%)	3 (5%)	2 (3%)
Subway (63)	47 (75%)	52 (83%)	26 (41%)	31 (49%)	0 (0%)	20 (32%)	0 (0%)
Starbucks (38)	21 (55%)	31 (82%)	23 (61%)	16 (42%)	0 (0%)	4 (11%)	0 (0%)
Pret a Manger (75)	38 (51%)	59 (79%)	41 (55%)	24 (32%)	7 (9%)	3 (4%)	12 (16%)
Costa Coffee (67)	32 (48%)	54 (81%)	39 (58%)	17 (25%)	14 (21%)	14 (21%)	2 (3%)
Count (% of total posts - 736)	**591 (80%)**	**569 (77%)**	**331 (45%)**	**233 (32%)**	**169 (23%)**	**132 (18%)**	**18 (2%)**

The use of child/ teen-like themes, language and trends was the most popular tactic used by the top 10 – 100% of KFC's posts used this tactic, 97% of Nando's, 92% of Domino's, 87% of McDonald's and 85% of Greggs'. Four out of every five posts by the top 10 featured themes, language or trends likely to appeal to young people.

Image 4: KFC post about school teachers



The use of animation, cartoons and bright colours was also commonly used, which makes sense considering that TikTok posts are in video format. Nearly half of all posts linked to special events/ days (45%) – because of the time period chosen for analysis, businesses frequently referred to Valentine's Day, New Years and Christmas, especially to spotlight their seasonal items (see image 5). KFC promoted its 'rizzmas giveaway' competition across 12 posts, with prizes that included 'skibidi gravy' as a stuffed toy, KFC-scented perfume and chicken-flavoured wrapping paper. Businesses also capitalised on pop culture events, such as movie or TV show premieres and sports matches – Domino's posted about the Premier League on TikTok 12 times over the three month content capture, contributing to its high engagement (see image 6).

Image 5: Greggs featuring its festive menu

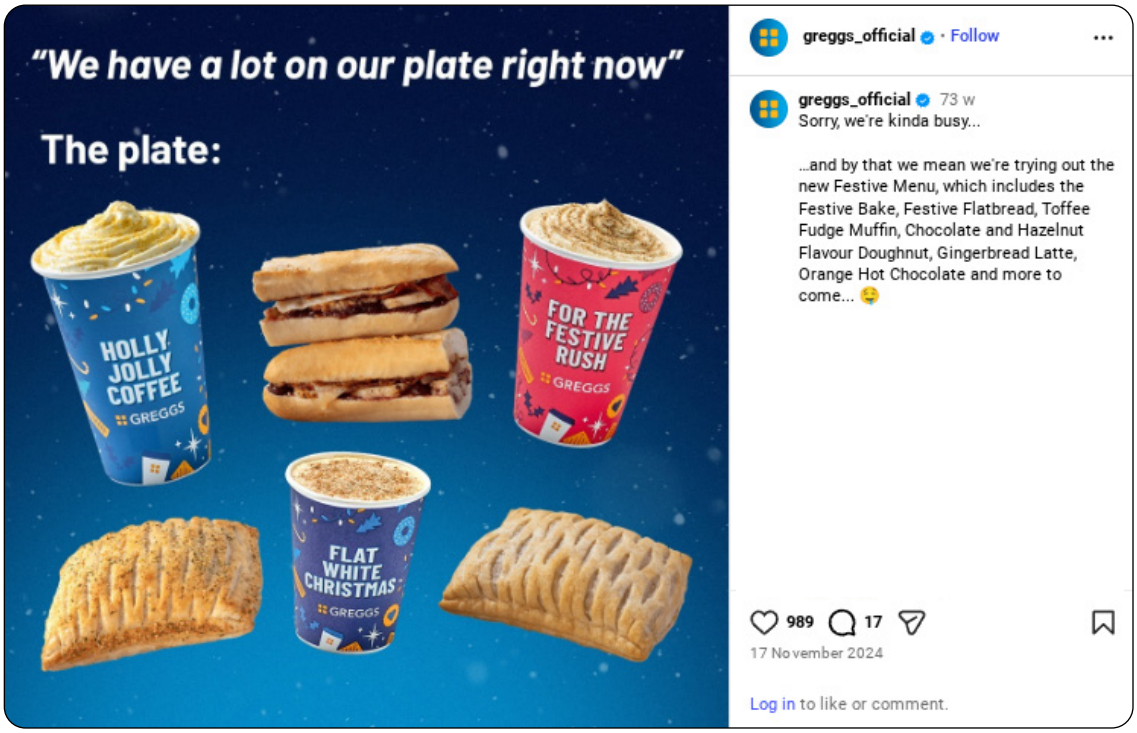
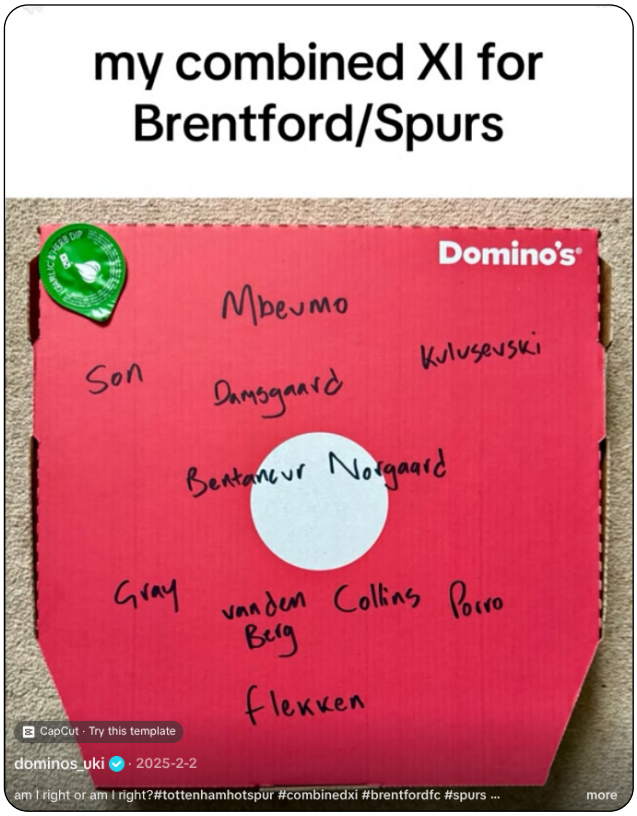


Image 6: Example of Domino's driving engagement by frequently posting about football matches



TRENDS

An interesting discovery during this analysis was the use by the top 10 of 'micro-influencers', defined as influencers with between 1,000 and 100,000 followers, or 'nano-influencers', who are influencers that function in a specific context or cater to a specialised audience.[45] We expected to see 'influencers' in the more traditional sense, but it seems that in addition to being more affordable than larger influencers, 'micro/ nano-influencers' can help brands create a personality, by developing friend-like relationships with followers. The top 10 regularly featured the same influencers across their posts, fostering familiarity and community.

Another way businesses used nano-influencers was as social media 'admin' which served to build parasocial relationships with a brand's follower base. The 'admin' teams featured on some of the top 10's social media accounts were exclusively young and communicated using Gen Z/ Alpha language (more on this later). KFC was the primary example of this, offering dates with its admin and signed pictures (see images 7 and 8). The frequency of comments from followers directed to admin suggest that this tactic is effective at relationship building.

Image 7: KFC encouraging followers to comment by offering a date with admin

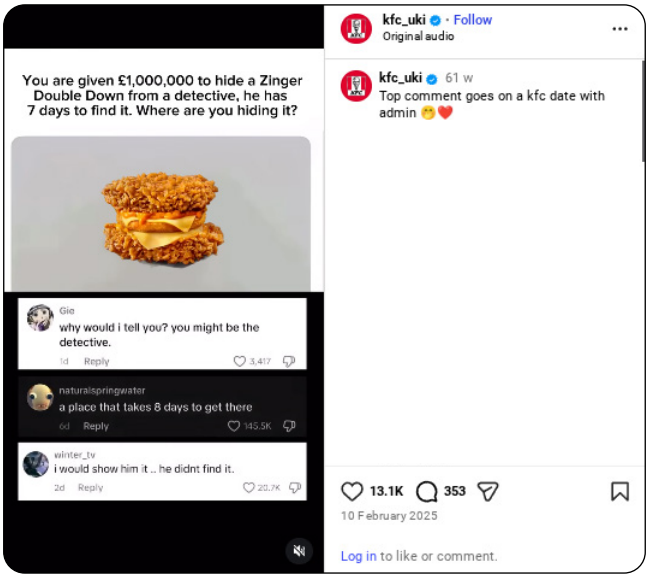
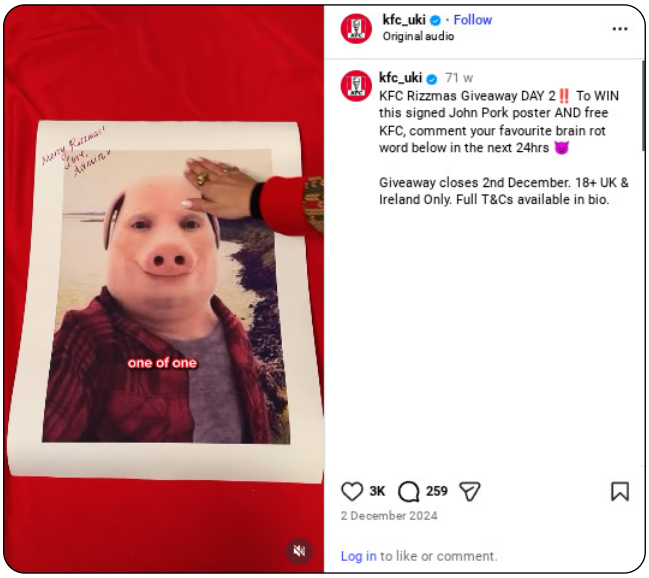


Image 8: A signed poster by KFC admin as one of the prizes in its 'rizzmass giveaway'



[45] Chen J., et al. (2024). A Comprehensive Overview of Micro-Influencer Marketing: Decoding the Current Landscape, Impacts, and Trends. Behav Sci (Basel). 14(3):243. doi: 10.3390/bs14030243.

The use of language was a particularly blatant tactic used to appeal to young people; most surprising however, was the frequent use of Gen Alpha slang. Whereas millennial slang tends to be influenced by mainstream media, Gen Z/ Alpha slang is influenced by gaming and internet meme culture.[46] The breakdown of age by generation is not an exact science, but most sources describe the oldest children of Gen Alpha to be 16 years old at the most. Gen Alpha language tends to use fewer characters (e.g. 'KO' for knockout) and condenses words, like 'rizz' for charisma. A list of the top Gen Alpha slang words included brain rot, skibidi, rizz, gyatt, sigma, mewing and aura – KFC launched an entire campaign called the 'rizzmas giveaway' (see Image 9). Another clue that this content is catered to younger audiences is the use of all lowercase letters and a lack of punctuation. See the comparison for language clearly directed at Gen Z/ Alpha compared to millennials (Box 5).

Image 9: KFC 'rizzmas giveaway'



[46] Mamidi, R.. (2025). The Evolution of Gen Alpha Slang: Linguistic Patterns and AI Translation Challenges. 678-686. 10.18653/v1/2025.acl-srw.43.

Box 5: Stark contrast between content geared to Gen Z/ Alpha (left) versus Millenials (right)





Ofcom's 2025 Children's Media Literacy Report named 'brain rot' as an emerging genre of video content. Several children in their study used the term 'brain rot' to describe content and the negative feeling they experienced after watching or engaging with it – it's so prevalent that it was named word of the year by Oxford University Press in 2024.[47] The term is used to describe content that is chaotic and unhinged. The use of 'brain rot' content by the top 10 seems to be key for higher engagement rates – as evidenced by KFC's frequent use of the phrase as an accurate descriptor of their content.

While no posts specifically mentioned Gen Alpha (likely because that would imply knowledge that a significant proportion of their audiences are younger than 16), the brands did identify Gen Z audiences (see Box 6).

[47] Rufo, Y. (2024). Losing your mind looking at memes? The dictionary has a word for that. https://www.bbc.co.uk/news/articles/cx2n2r695nzo

Box 6: Gen Z mentioned in posts



Costa using #genz



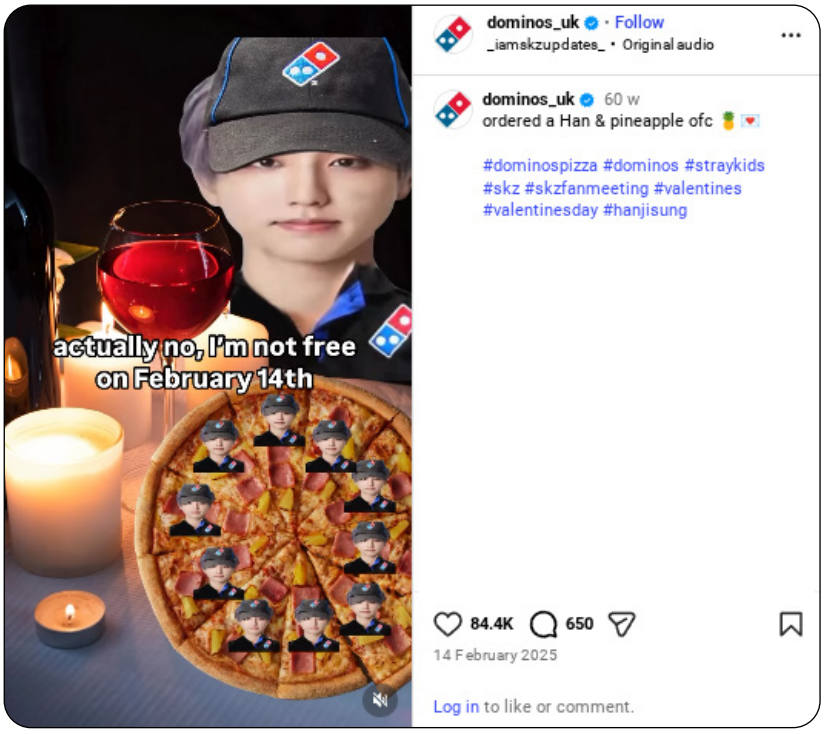
Burger King using Gen Z slang

The brands with more blatantly youth-directed content had another practice in common – making things 'memeable'. In other words, content was hypercurrent, seemingly random and appealed to Gen Z/ Alpha humour. The quick nature of social media means brands can capitalise on trends, without much, if any, cost. KFC dominated this space and capitalised on Duolingo's 'death of Duo campaign' (see image 10). Brands use other viral social media moments to connect with young audiences – for example, Domino's continues to play up its unofficial collaboration with Stray Kids after they released a song called 'Domino' in 2018. This type of collaboration is extremely low cost with high impact because it's driven mainly by fan-driven content and doesn't rely on expensive marketing partnerships. Refer to Appendix 3 for additional examples of brands capitalising on pop culture to stay relevant with young people.

Image 10: KFC capitalising on the 'death of Duo campaign'



Image 11: Domino's playing on its unofficial collaboration with popular South Korean boy band, Stray Kids

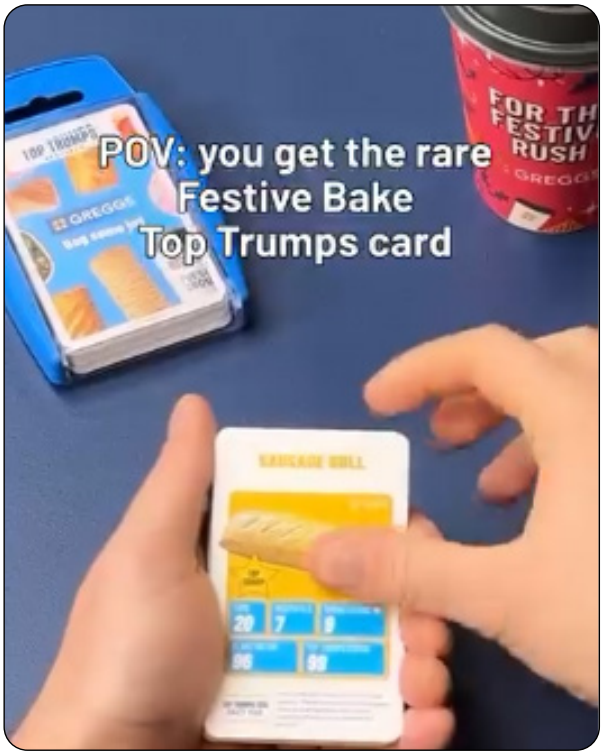


There were a number of other trends that popped up across the brands' social media accounts (see Table 8) – some but not all include the pov (point of view) trend, employee-generated content, Spotify Wrapped and the chill guy meme.

Box 7: Examples of common trends

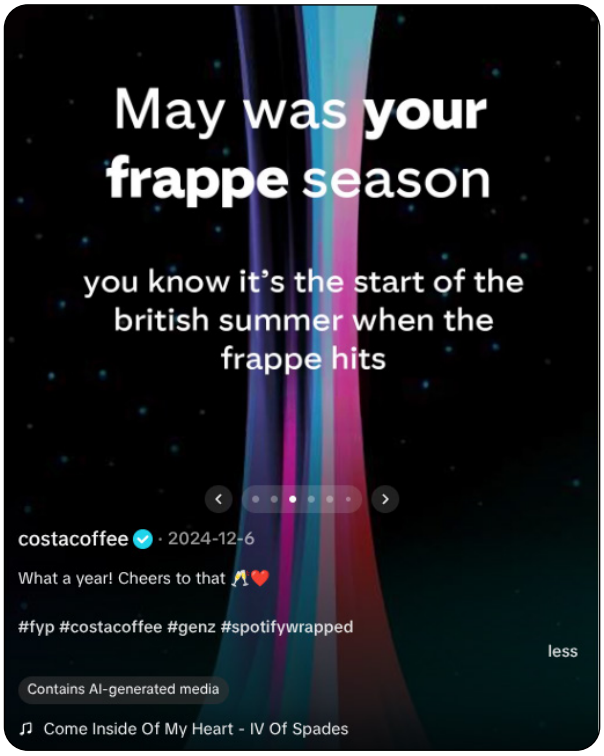
POV TREND

Greggs



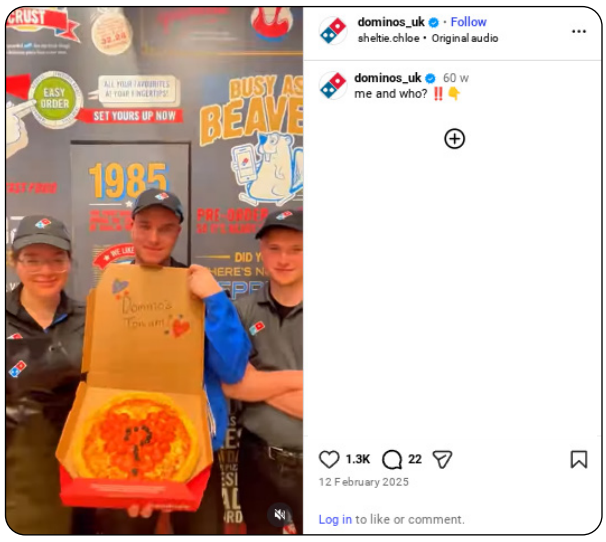
SPOTIFY WRAPPED

Costa



EMPLOYEE-GENERATED CONTENT

Domino's



CHILL GUY MEME

Nando's

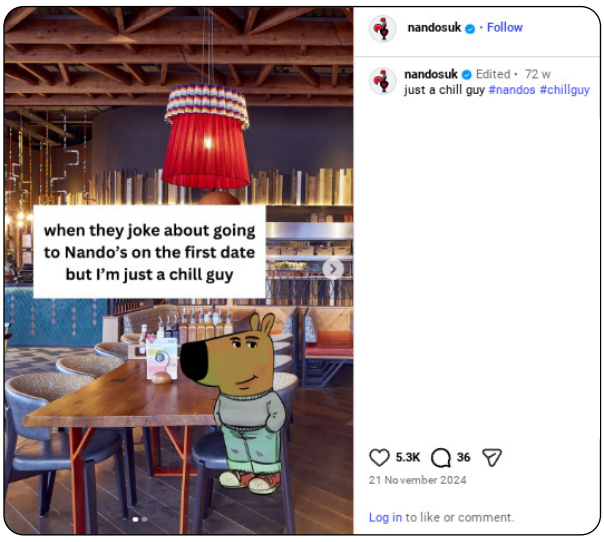


Table 8: Repeated trends across the top 10 social media accounts

Business	POV	employee-generated content	Spotify wrapped	chill guy meme
Burger King	✓		✓	
Costa Coffee	✓	✓	✓	
Domino's Pizza	✓	✓	✓	✓
Greggs	✓	✓	✓	✓
KFC	✓	✓		✓
McDonald's				
Nando's			✓	✓
Pret a Manger		✓	✓	
Starbucks	✓			
Subway	✓			

HEALTH X YOUTH APPEAL

Because businesses don't always transparently share the nutrient information for all of their menu items (especially seasonal items) this research was not able to do a full analysis of whether posts with stronger potential to appeal to young people were more likely to also feature HFSS products, but it's clear that the top 10 heavily market unhealthy food and drink across their social media accounts.

Costa, Starbucks and Pret featured sugary coffee drinks and bakery items (see images 12, 13 and 14).

Image 12: Costa featuring its carrot cake (HFSS) while appealing to young people with its Spotify Wrapped trend and #genz



Image 13: Starbucks using a microinfluencer in a challenge to identify Gen Z slang, marketing its seasonal Caramel Waffle Latte (HFSS)



Subway marketed its own merch line (see Image 15) modelled by young people, which featured its Chipotle Southwest sauce (HFSS) and dedicated 7/33 of its Instagram food posts to its footlong cookie line (HFSS). Every Greggs post on TikTok was scored for using teen language/ trends to appeal to young people and 100% of these that featured food or drinks, featured an HFSS product. In addition to its pizzas, Domino's used various tactics with the potential to appeal to young people to market its chocolate chip cookies, twisted dough balls with chocolate & OREO crumb and garlic & herb dip – all of which are HFSS. One of the most bizarre examples was its 'cosy cookie' bean bag giveaway (see Image 16).

Image 14: Pret featuring an all-butter croissant (HFSS) in a post about celeb Timothée Chalamet

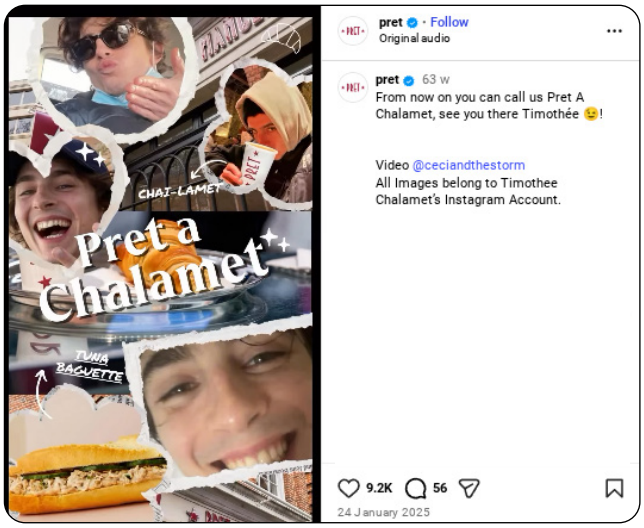
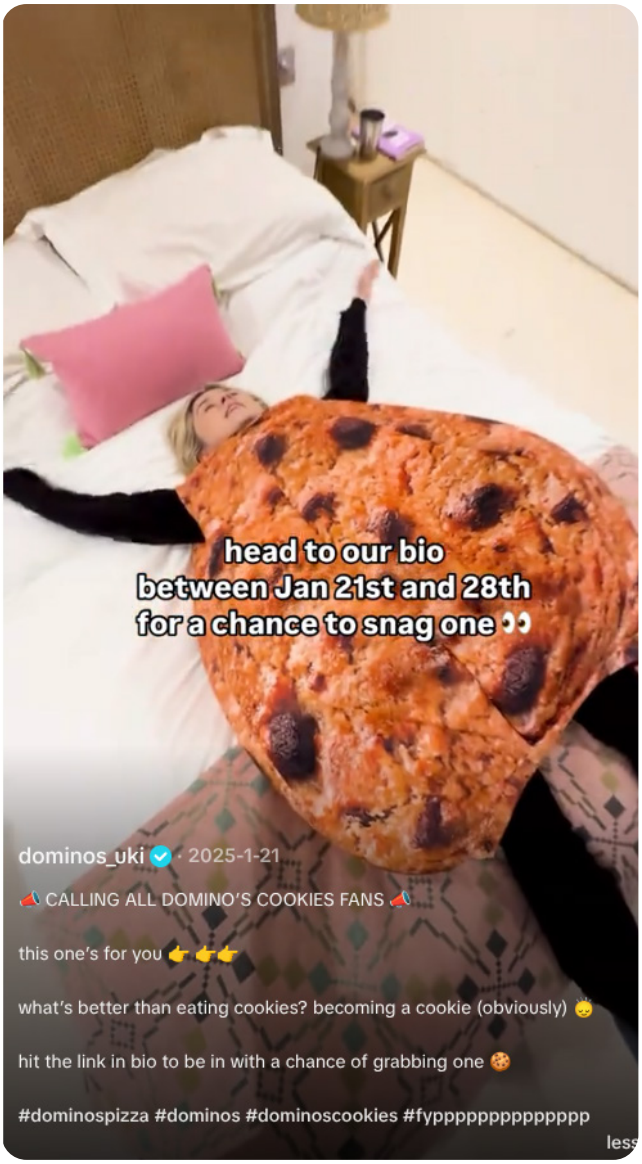


Image 15: Subway merch



Image 16: Domino's beanbag giveaway, marketing its chocolate chip cookie



Burger King used child or teen-like themes/ trends to appeal to young people on each of its TikTok posts and build excitement around specific menu items, such as the chili cheese bites (HFSS) (see image 17). McDonald's used Stormzy to market its HFSS McFlurry (see Image 18).

Image 17: Burger King encouraging followers to engage with its post featuring chicken fries, chilli cheese bites and onion rings all sandwiched between a burger bun

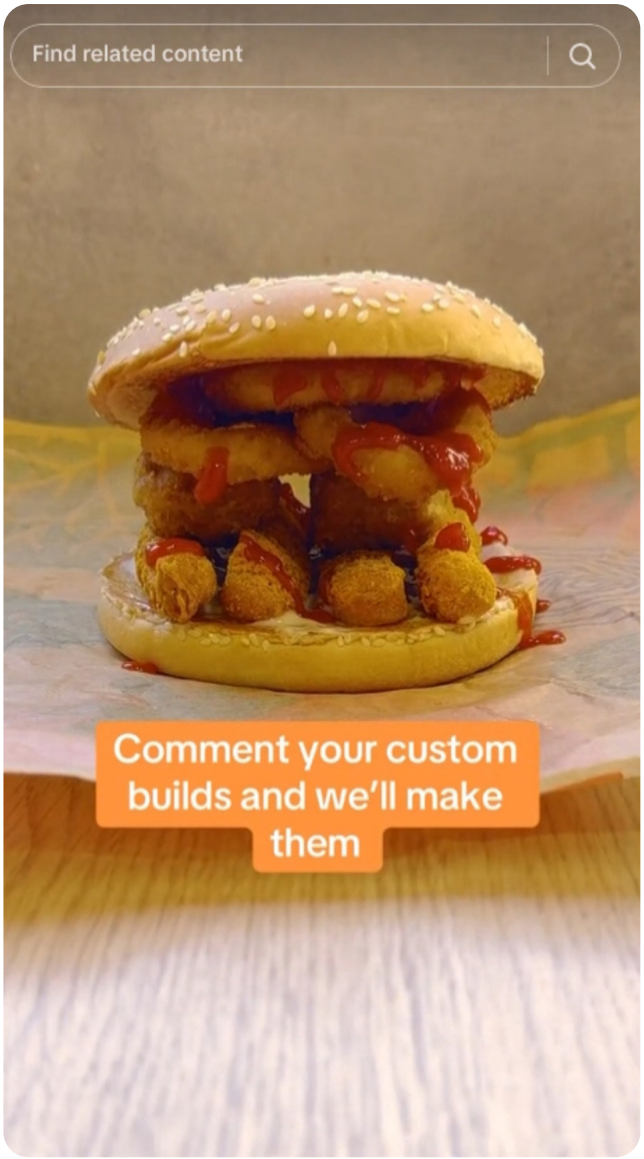


Image 18: McDonald's x Stormzy collab



Nando's heavily featured its HFSS creamy salad dressing in 8 of its TikTok posts and 7 of its Instagram posts. KFC featured its HFSS gravy more than 30 times across both platforms and even wrote a whole story line around its 'skibiddy gravy' character and marketed it as a stuffed toy (see Image 20).

Image 19: Nando's using humour to build hype around its 'fan-favourite' creamy salad dressing

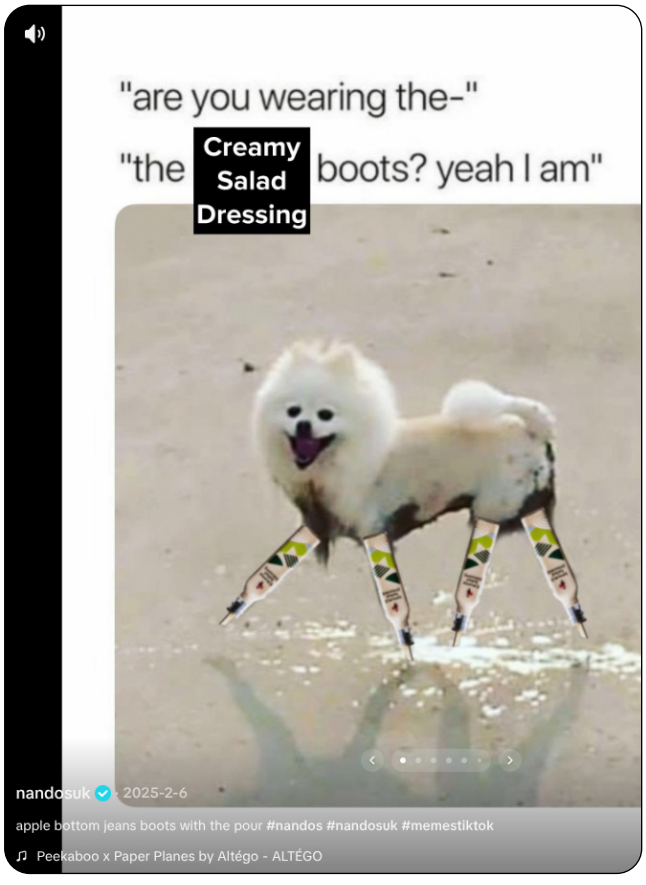


Image 20: KFC 'skibiddy gravy' and other fictional characters featured in brain rot video



CONCLUSION



This analysis adds to the evidence base showing that rather than follow the spirit of the rules put in place to protect children's health, Big Food brands are benefitting from loopholes. Without comprehensive government regulation, young people's exposure to unhealthy food and drink marketing is only going to get worse, therefore thwarting the government's efforts to raise the healthiest generation ever. Businesses should not engage in any activity to attempt to delay or weaken government public health policies.

This report also marks the tip of the iceberg - this analysis only covers two social media platforms, and excludes other types of platforms such as for videogame livestreaming, on which some food and drink brands have their own accounts.

More research, commissioned by the government, is needed to understand the impact of marketing through different types of media on the health of children and young people. We also need to better understand how the impacts of junk food marketing in the digital world are felt across diverse groups in the UK. In an online survey of 4,000 participants aged 11 to 21 across the UK, CRUK found that young people who identified as being from an ethnic minority background reported higher exposure to and engagement with HFSS content on social media than those who identified as white.[48] And new analysis by Nesta found that younger and more deprived groups face higher exposure and more aggressive tactics when it comes to direct digital marketing from food businesses (via email, app notifications or SMS).[49]

Policy development is needed to identify routes into regulating these types of marketing and prevent brands from shifting unhealthy marketing to unregulated spaces, for example, from paid to owned media. Without more robust mechanisms for age verification, age-based restrictions for brands' posts and accounts will only have a limited impact on protecting children from content that promotes unhealthy products. However, businesses are already able to set a default age-based restriction or specify these restrictions by country, and have the capability to use these settings to protect

[48] Saunders A, et al. (2025). Cancer Research UK. Digital influence: Young people's exposure to the marketing of cigarettes, vapes, unhealthy food/drink and alcohol.
[49] Nesta (2026) Mind the gaps: Why restrictions on less healthy food and drink advertising fall short https://media.nesta.org.uk/documents/Mind_the_gaps_-_full_report.pdf



children who are registered with their correct age.[50] Regulators and policymakers are aware that much more needs to be done to protect children. In March 2026, Ofcom and the Information Commissioner's Office coordinated announcements putting pressure on social media platforms to enforce their minimum age limits on their services.[51,52] Members of the Health and Social Care Committee have raised their concerns about increasingly young children interacting with food brands on their phones.[53] One option could be to set an age check for under-18s for the social media accounts of unhealthy food and drink brands. And social media platforms should not be permitted to serve organic posts from those unhealthy brands on the "Explore" or "For You" pages.

The UK Government has made some positive steps towards its ambition of raising the healthiest generation ever. We have to remain focused on the goal: to protect children and young people from all forms of junk food marketing. The time to act is NOW.

[50] TikTok audience controls only allow for content to be restricted to under 18s but on Instagram, businesses can set any minimum age for viewing their account or individual posts.
[51] https://www.ofcom.org.uk/online-safety/protecting-children/keep-underage-children-off-your-platforms-ofcom-tells-tech-firms
[52] Information Commissioner's Office. (2026). Open letter to social media and video sharing platforms on strengthening age assurance https://ico.org.uk/about-the-ico/open-letter-to-social-media-and-video-sharing-platforms-on-strengthening-age-assurance/
[53] https://committees.parliament.uk/event/25468/formal-meeting-oral-evidence-session/

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FUEL US
DON'T
FOOL US

APPENDIX 1:

BITE BACK-ADAPTED CODING FRAMEWORK

Variable type	Variable	Description of data required
Exposure	Screenshot/ screen record	Uploaded to google drive
Exposure	URL	URL of post page being coded
Exposure	Date posted	Date the post was posted recorded in format DD/MM/YYYY
Engagement	Number of likes	Number of likes the post has on the date of data collection
Engagement	Number of comments	Number of comments the post has on the date of data collection
Engagement	Number of times item saved	Number of times item was saved on the date you are doing the coding (TikTok only)
Engagement	Prompt to engage	Is there a prompt to 'engage' with the post? i.e. encouragement to share/tag/like/comment/etc.
Engagement	Use of a hashtag	Is there a hashtag? Can be generated by account in post, caption or comments
Engagement	Marked as ad	Is the post clearly marked as an ad? Can also say sponsored or any indication the post has been paid for
Engagement	Marked as 18+	Does the post specify the content is for 18+?
Nutrient content	Food/drink product(s) in post	Are there any food/drink items featured in this post (branded or unbranded)?
Nutrient content	Number of identifiable food items featured in this post	Are there any identifiable food/drink items featured in this post (branded or unbranded)?
Nutrient content	Name of product	Type in the name of the food featured (include the item most likely to be HFSS first; if HFSS, entire advert fails so can stop coding NPM; if not HFSS, add each item individually) - best possible guess based on businesses website/ menu; hyperlink nutrition information where possible
Nutrient content	Total NPM score	
Nutrient content	Result	Pass/fail

Variable type	Variable	Description of data required
Power	Prompt to purchase/order	Is there a prompt to buy a product? This can be in the post, comments or caption; include implied prompts, e.g. 'have you tried...?'
Power	Reference to app/ loyalty programme	Is there a reference to the business's app or loyalty/rewards programme? This can be in the post, comments or caption.
Power	Reference to low price/price promotion	Is there a reference to the low price of the product or any kind of price promotion or BOGO deal? Also includes any mention of a 'low' priced product, e.g. 'saver subs' or meal deals
Power	Reference to new product or limited time offer	Is there a reference to introducing a new product or a limited time offer? Also includes limited time competitions, rewards, etc.
Power	Sponsorship	Is sponsorship (e.g., the brand sponsoring a sports team, school or cultural event) mentioned in words or images within the post?
Power	Brand partnership	Is a brand partnership featured in the post? i.e. food product collab; Is the post shared content among multiple businesses? Are any other businesses tagged in the caption? Individuals/ influencers would not count as a 'brand'
Youth appeal	Gifts or incentives	Use of free gifts and incentives (ease of preparation, competitions to win rewards, etc.)
Youth appeal	Celebrities/ influencer	Does the post feature a celebrity or influencer (includes micro/ nanoinfluencer)?
Youth appeal	Characters (brand equity, licensed, etc.)	Does the post feature a character that has been created for the sole purpose of promoting a product or brand (e.g. Ronald McDonald) or one that is licensed by brands to appear in their promotions (e.g. Dora the Explorer, Shrek)?
Youth appeal	Child/ teen-like themes, language, trends	Use of child/ teen-like language such as slang, phrases, hashtags relevant for this group. Also consider popular social media trends, for example popular dance challenges
Youth appeal	Links to special days/ events	Does the post link to 'special days' such as national holidays (Christmas, New Years, Valentine's) OR popular events, e.g., the Super Bowl?
Youth appeal	Presence of animation, cartoons, jingles, bright colours	Does the post use eye-catching animation, bright colours or audio-visual cues?
Youth appeal	Health/ sustainability	Nutrition claims or themes relating to environment, sustainability and climate. Includes products that are portrayed as 'health' foods or mention of veg options

APPENDIX 2:

BUSINESS RESPONSES

Analysis of the food posts was shared with each of the top 10 businesses for confirmation of nutrient classification of products.

The following businesses responded:

- Costa Coffee
- Domino's
- KFC
- Greggs
- Starbucks
- Pret a Manger

The top 10 businesses were given the opportunity to provide a written response to our research. Publishing the comments does not reflect any endorsement or support of their position from Bite Back.

The following were provided:

"At Domino's, we're committed to marketing responsibly. Our Responsible Marketing Policy applies across our entire system, including all franchise partners, and sets a clear standard - that we do not target under-18s."

DOMINO'S

"As a much-loved brand, we showcase a broad range of menu items, highlighting the choice available to our customers and supporting them to make informed decisions. We take a responsible approach to advertising, adhering to all relevant codes and regulations, as well as voluntarily implementing additional measures."

MCDONALD'S

No responses were provided by the following businesses:

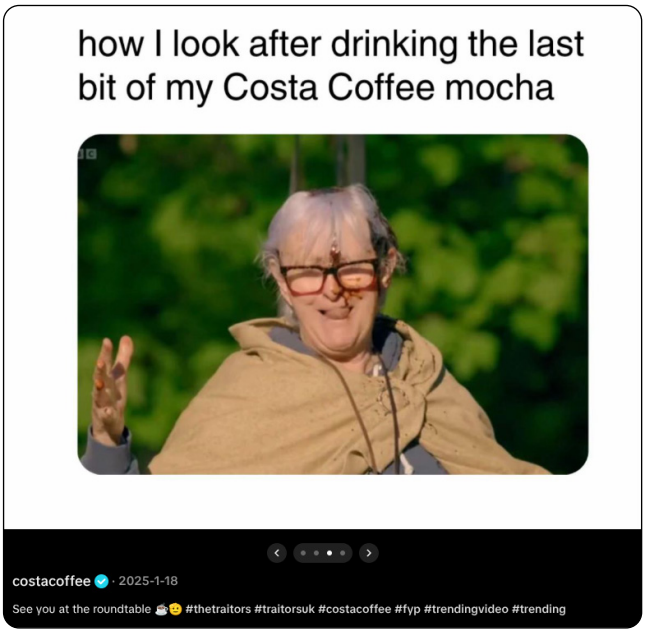
- Burger King
- Costa Coffee
- Greggs
- KFC
- Nando's
- Pret
- Starbucks
- Subway

APPENDIX 3:

HOW BRANDS ENGAGE WITH POP CULTURE



KFC playing on the meme that started with Fortnite steamer, Ninja about his low taper fade haircut.



Costa using the popular reality TV show called Traitors to boost engagement.



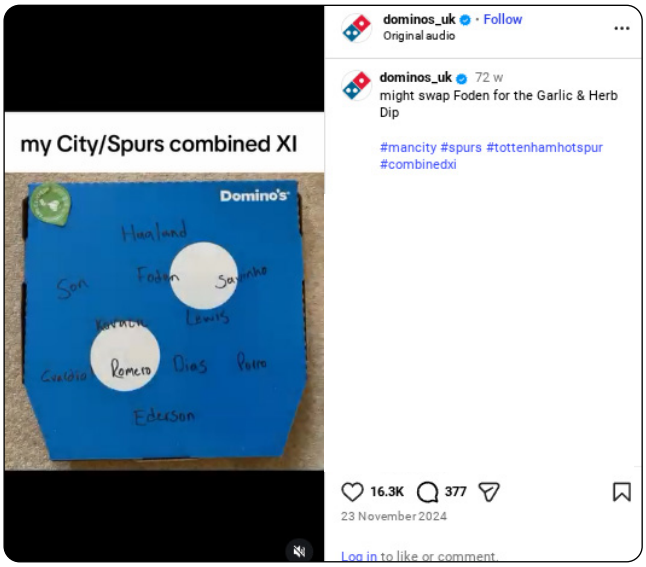
Subway responds to viral Subway diss track.



KFC using viral audio from Squid Games in its TikTok.



Pret campaign tied to brat subculture, popularised by Charli XCX's 2024 album.



Domino's connected with and baited football fans by posting frequently in support of Man City.

WE'VE GOT A BIG APPETITE FOR CHANGE

Report 7 in Fuel Us Don't Fool Us series

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