Putting health centre stage:

How healthier food advertising policies have improved public health without reducing advertising revenues

Our research shows that adopting a healthier food advertising policy has not led to a reduction in advertising revenue. Given the well-evidenced public health and economic benefits, this demonstrates a strong case for robustly restricting the advertising of unhealthy foods and drinks.

Introduction

Global health bodies including the World Health Organization and UNICEF now explicitly recommend mandatory, comprehensive restrictions on marketing of unhealthy foods and drinks to anyone under the age of 18.[1,2] More recently, such restrictions have been endorsed by the United Nation's Food and Agriculture Organization[3] and identified as valuable policy interventions by global climate organisations like EAT-Lancet.[4]

Local healthier food advertising policies are designed to remove the spotlight from less healthy food and drinks across advertising estates controlled by local governments, which often includes digital screens, bus stops and roundabout signs. Such policies put healthier rather than less healthy food centre stage within communities, while still allowing food and drink businesses to promote their products. They're proven to prevent disease while saving money for healthcare and social care services that would have been spent on treatment and support.

Advertising policies are also an important intervention for addressing health inequality. What surrounds communities shapes their health, and evidence shows people living in

[1] World Health Organization. (2023) *Policies to protect children from the harmful impact of food marketing: WHO guideline*.
[2] UNICEF and World Health Organization. (2023) *Taking Action to protect children from the harmful impact of food marketing: a child rights-based approach*.
[3] Food and Agriculture Organization of the United Nations. (2023) *Achieving SDG 2 without breaching the 1.5°C threshold: A global roadmap*.
[4] Rockström, J et al. (2025) *The EAT-Lancet Commission on healthy, sustainable and just food systems*. The Lancet.

more deprived neighbourhoods are more exposed to unhealthy food advertising.[5,6] Therefore people living within these communities will have the biggest health benefits from policies that robustly switch the spotlight away from unhealthy foods and drinks.

Local governments have seized this opportunity, recognising the benefits of healthier food advertising policies and the savings of hundreds of millions of pounds for NHS and social care budgets. However, it is important to analyse whether the adoption of these policies is likely to impact revenue from local governments' advertising estate. Efforts by the advertising industry to prevent the adoption of such policies regularly include claims that there will be negative financial repercussions.[7,8,9] This report presents research from the University of Portsmouth which reveals that these policies also prove cost-effective immediately. It shows that local governments that have adopted healthier food advertising policies have comfortably maintained their advertising revenues over the 5-year period investigated.

The researchers analysed publicly available data, financial institutions' records, and local governments' responses to Freedom of Information requests to track and model the outcomes.[10] Following analysis of all available data, this report found no evidence of revenue losses after the introduction of a healthier food advertising policy. This was regardless of location, size or contract type.

[5] Olsen, J R et al. (2021) *Exposure to unhealthy product advertising: Spatial proximity analysis to schools and socio-economic inequalities in daily exposure measured using Scottish Children's individual-level GPS data*. Health and Place.
[6] Palmer, G et al. (2021) *A deep learning approach to identify unhealthy advertisements in street view images*. Nature.
[7] Borland, S. (2025) *Bans on junk food advertising in outdoor spaces derailed by industry lobbying*. The BMJ.
[8] Thompson, C et al. (2021) *Media representations of opposition to the 'junk food advertising ban' on the Transport for London (TfL) network: A thematic content analysis of UK news and trade press*. SSM – Population Health.
[9] Lauber, K et al. (2021) *Corporate political activity in the context of unhealthy food advertising restrictions across Transport for London: a qualitative case study*. PLOS Medicine.
[10] See appendix for the full data breakdown.

Findings

Financial benefits: Healthier food advertising policies bring savings for public health care expenditures

In recent years, institutions responsible for public health such as local governments have faced tough financial conditions, balancing funding cuts with growing service demands. The cost of social care to support people living with overweight and obesity in the UK was estimated to be £1.2 billion in 2025.[11] In many areas, social care costs are increasing. Scottish local governments spend 30% of their budget on these services.[12] In Northern Ireland, social care makes up 50% of the government budget.[13] And in England and Wales, demand has grown from 52% to 61% of local government budgets over the last decade.[14]

Preventative measures, designed to improve health, can reduce the financial pressure on public services, and healthier food advertising policies have been proven to do so. When unhealthy food adverts were restricted across London's transport network (TfL) in 2019, it changed purchasing habits, resulting in households buying 1000 fewer weekly calories from unhealthy foods, and it led to a 20% reduction in high-sugar purchases like chocolate and confectionery.[15] As a result, the policy is expected to lead to approximately 100,000 fewer people living with obesity, 3000 fewer living with Type 2 Diabetes and 2000 fewer living with heart disease. Crucially, researchers from the University of Sheffield were able to model likely savings to the NHS from reduced disease incidence, as a result of reduced exposure to less healthy food and drink advertising. They estimated this saving to be £218million to local NHS services over the course of the current population's lifetime.[16]

The positive findings from the Transport for London evaluation have broader and wider generalisability. As that research concludes "these findings provide support for policies that restrict HFSS [high fat, salt and/or sugar] product advertising as a tool to reduce purchases of HFSS products, as a way of improving population diet and preventing obesity."[17]

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[11] Nesta. (2025) *The economic and productivity costs of obesity and overweight in the UK*.
[12] Scottish Parliament (2025) *Pre-budget scrutiny: public service reform*. Scottish Parliament Finance and Public Administration Committee. (Accessed 17th February 2026.)
[13] The NHS Alliance. (2025) *NICON submission on the DoH Budget settlement 2025/26*. (Accessed 6th October 2025.)
[14] Local Government Association. (2024) *Save local services: How is £1 of funding spent?* (Accessed 6th October 2025.)
[15] Yau, A et al. (2022) *Changes in household food and drink purchases following restrictions on the advertisement of high fat, salt and sugar products across the Transport for London network: controlled interrupted time series analysis*. PLOS Medicine.
[16] Thomas, C et al. (2022) *The health, cost and equity impacts of restrictions on the advertisement of high fat, salt and sugar products across the transport for London network: a health economic modelling study*. International Journal of Behavioral Nutrition and Physical Activity.
[17] Yau et al. (2022).

Costs: Healthier food advertising policies present negligible risk to advertising revenues

Advertising can play a key role in generating income for local governments. Prior to this research, there has been little work to systematically uncover the impacts on advertising revenues of introducing a healthier food advertising policy. The research underlying this report builds the clearest picture yet of these impacts.

There were two main findings:

1. **Advertising revenues in local governments across the UK were maintained following the introduction of a healthier food advertising policy, when compared with places without a policy.**

This was true across different locations, size of advertising estate, contract and local government type.

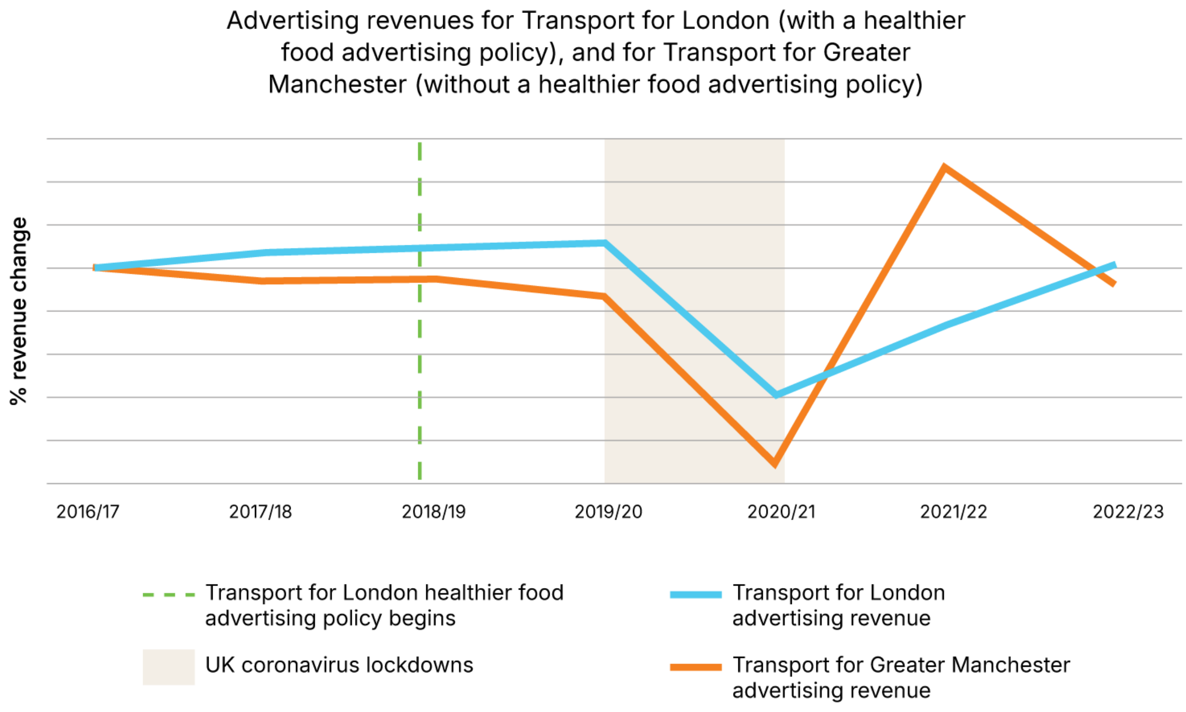

Figure 1: The standardised advertising revenues for Transport for London (which has a healthier food advertising policy) compared with one that does not have a policy (Transport for Greater Manchester). Transport for London's policy was introduced in February 2019.

Figure 1 shows data for the UK's largest single advertising estate and the first to have adopted a policy (Transport for London), for which we have a revenue dataset that tracks three years following policy adoption, and thus the clearest picture of revenue impact. Transport for Greater Manchester, by comparison, did not have a healthier food advertising policy over these years. Revenue in both Transport for London and Transport for Greater Manchester dropped in 2020/1 during the Covid-19 pandemic, when lockdowns led to lower customer numbers on public transport, and were recovered afterwards. The appearance of a quicker recovery in Manchester is likely to be due to the larger relative initial drop, and the change to London underground usage which was only operating at 60% of pre-pandemic levels by 2021/22, but makes up the majority of Transport for London's advertising revenues.[18] Manchester's buses and trams were operating at 80 and 70% of pre-pandemic levels respectively over this time.[19] Overall, since policy introduction, the revenue for Transport for London has not dropped in real terms, or in comparison to an area without a policy.

Our extended analysis showed that the Transport for London experience is not an exception. The researchers filed Freedom of Information requests to all local governments in the UK and received 360 responses, covering local governments in Scotland, Northern Ireland, Wales and England, with 140 of those confirming they had an advertising contract, and 44 contracts from 38 local governments provided sufficient data on the annual percentage change of revenue to allow for comparison. Analysis of these data reveals that when local governments with an advertising policy are compared to those without, the introduction of advertising policies did not result in a reduction in revenues.

[18] Oakes, O (2020) *TfL's Tube network has been 'hardest hit' in outdoor market. How will it rebound?* Campaign. (Accessed 20th October 2025.)
[19] Transport for Greater Manchester. (2022) *Written evidence (TTS0056)*. UK Parliament Committees. (Accessed 20th October 2025.)

2. Advertising revenues in local governments that introduced healthier food advertising policies did not fall compared to UK-wide trends

The advertising revenues of local areas with policies continued to track the general trends in advertising expenditure across the UK, following the introduction of a policy. Therefore, there was no observed loss compared to expected revenues.

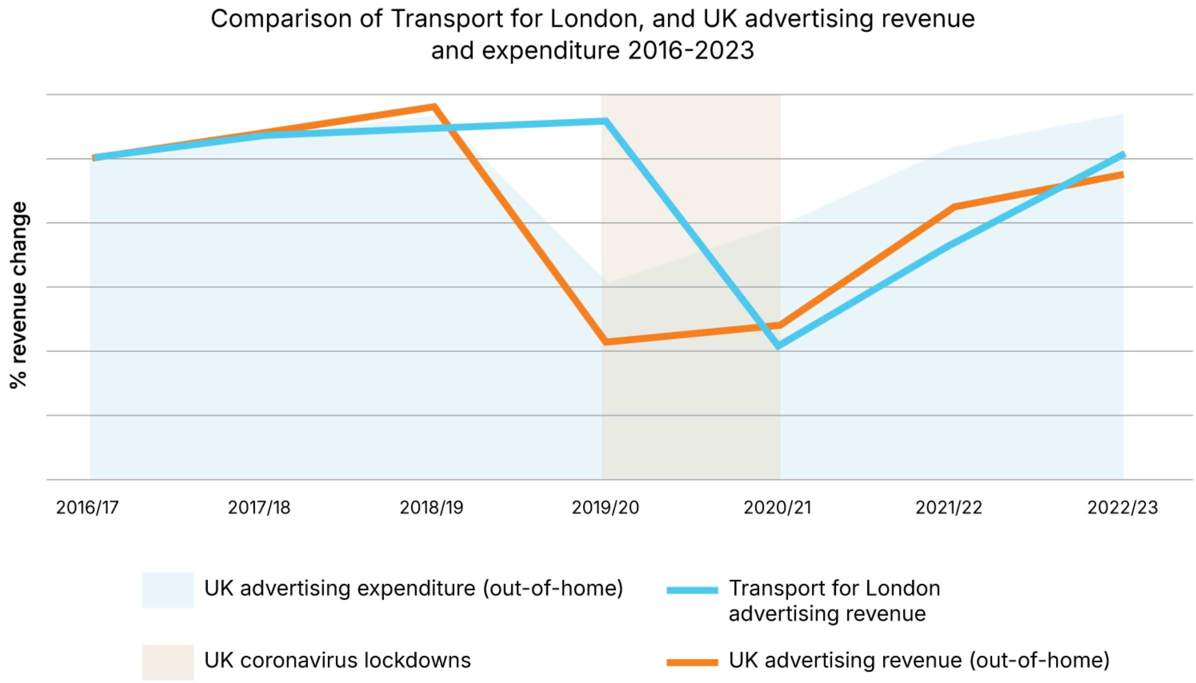

Figure 2: The overall trend of expenditure and revenue from UK outdoor advertising is compared with that of Transport for London. Both show a dip during 2019/20 and then recovery, with Transport for London marginally outperforming the overall UK outdoor advertising spend in 2022/3.

The UK outdoor advertising expenditure is the amount of money that companies – such as food and drink companies – spend on outdoor sites like billboards, planters, bus stops and roadside digital screens across the UK. It therefore represents the general trends in purchasing of outdoor advertising in the UK (including local government owned and non-local government owned sites). Revenues are the amount of profit derived from this outdoor advertising real estate.

Figure 2 shows that after bringing in a policy in 2019, the advertising revenues for Transport for London were in line with the outdoor advertising trends across the UK. We can be confident that introducing a healthier food advertising policy has not negatively impacted advertising revenues or potential revenues.

Long-term effects and contribution to system-level change: Healthier food advertising policies are incentivising positive changes in the food industry

Robust healthier food advertising policies mandate that companies can only advertise foods and drinks lower in fat, salt and/or sugar. No company is banned from advertising, but their adverts must promote healthier products. These policies:

- **Have incentivised companies to switch the spotlight away from unhealthy food**, instead setting the stage for healthier food through product reformulation and creative new advertising campaigns.
- **Are likely to have helped maintain advertising revenue**, because companies earn the opportunity to advertise by changing their advertising content to set the stage for healthier food, and therefore can and do still spend money on advertising.

Figure three: Example of adverts before (above) and after (below) implementing the healthier food advertising policy, based on real-life examples. Originally designed for Sustain's Healthier Food Advertising Policy Toolkit (2022).[20]

[20] Sustain. (2022) Healthier Food Advertising Policy Toolkit.

Following the success of the policy, there's a movement of local leaders across the country who are working to introduce robust policies in their area. At the time of writing, 25 local governments plus the Mayor of London have passed robust healthier food advertising policies.

None of the local governments that introduced these policies have since reversed them.

Haringey Council – the first council to bring in a healthier food advertising policy - describes how the policy is succeeding in switching the spotlight away from unhealthy food advertising while maintaining advertising revenues:

"Haringey Council implemented our advertising policy in July 2019, aligning with the TfL [Transport for London] policy, restricting the advertising of HFSS [high fat, salt and/or sugar] products – the first borough in the UK to do so. Our advertising policy was catalysed by our School Superzones initiative and fits with our priorities as outlined in our Borough Plan and framework for Health and Wellbeing Strategy.

Our advertising policy is an integral part of our action to protect children's health and encourage healthy behaviours through targeted interventions. All agreements with external providers adhere to this policy and there has been no financial loss to us as advertising spaces are allocated to other advertisements that don't promote HFSS products, alcohol, gambling or other activities that are harmful to the health and wellbeing of our communities."

Haringey Council statement 2023

Conclusion

This research demonstrates a clear case for introducing robust healthier food advertising policies. Where such policies have been adopted, they've incentivised businesses to continue to advertise but innovate and spotlight healthier products, and thus not led to a drop in advertising revenue for local governments, relative to places without a policy, or wider trends. As such, this research supports the widespread adoption of robust policies as a fiscally responsible and effective public health measure.

Recommendations

All tiers of government and health institutions:

- The most robust form of healthier food advertising policy should be adopted across all advertising directly and indirectly controlled by the administration.
- National governments must build on the strong and well-evidenced precedent from local governments by introducing nationwide robust restrictions on all unhealthy food and drink advertising across all mediums including outdoor, direct marketing, radio and cinema as well as TV and online. The policy should adhere to the Nutrient Profiling Model without exceptions and restrict all forms of advertising including brand only, incidental and SMEs.
- Introduce measures to protect policymaking from undue corporate influence by ensuring all business interaction and lobbying is transparent and that conflicts of interest are declared and addressed in decision making.
- Build better transparency regarding advertising data, such as advertising revenues and breakdowns by category so that administrations can track impacts and make informed decisions about effective public health policy, as well as guarding against the spread of misinformation.

Accounting institutions including The National Audit Office (NAO), the International Federation of Accountants (IFAC), The Chartered Institute of Public Finance and Accountancy (CIPFA):

- Ensure greater transparency within reporting from public bodies so that funds can be better scrutinised and better-informed decisions can be made in the public interest.

Outdoor Advertisers including advertising companies as well as advertising trade associations:

- Be proactive and show leadership in complying with a robust Healthier Food Advertising Policy, as defined by public health expertise.
- Demonstrate leadership in collaborating with governments by ensuring advertising aligns with their policies and priorities regardless of contractual arrangements.
- Provide more transparency over the data about advertising sites in public spaces so that policymakers can make well informed decisions

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Fran Bernhardt is Sustain's Commercial Determinants Coordinator. She co-designed Transport for London's Healthier Food Advertising policy; a landmark initiative to restrict unhealthy food and drink advertising which is now recommended as part of global action to create healthy, sustainable and just food systems.[21] A Churchill Fellow, she has delivered keynotes at global conferences and her research is published in PLOS Climate and Perspectives in Public Health. Her expert commentary has been featured in outlets including The BBC, The Times, The Guardian, The Daily Mail and The BMJ.

Fran convenes a network of more than 150 local governments providing strategic guidance to support them to successfully implement healthier food advertising policies. At the time of writing, 25 local governments and Transport for London have adopted such policies.

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Appendix

Appendix for Putting Health Centre stage: how healthier food advertising policies have improved public health without reducing advertising revenues

[21] Rockström, J et al. (2025).