

It's not just what's on the menu.

How WA's biggest fast-food brands
influence neighbourhood nutrition.

March 2026





In the spirit of deepening relationships, Cancer Council WA acknowledges all the Traditional Custodians of Country throughout Western Australia and recognises their continuing connection to land, waters, sky, and community.

We also pay our respect to their Elders and extend that respect to all Aboriginal peoples living and working in this area.

Suggested Citation: Cancer Council Western Australia. 2026, *It's not just what's on the menu. How WA's biggest fast-food brands influence neighbourhood nutrition*, Cancer Council Western Australia, Perth.

Contact

This report was prepared by Cancer Council Western Australia and the work generously funded by Healthway.

Cancer Council Western Australia

Level 1, 420 Bagot Road, Subiaco WA 6008

E: foodpolicy@cancerwa.asn.au

W: cancerwa.asn.au



CONTENTS

Executive summary 3

The audit 6

Findings 8

Discussion 15

Recommendations 16

References 17

Appendix 20

It's not just what's on the menu
WA's biggest fast-food brands

Executive Summary.



EXECUTIVE SUMMARY

The rapid rise in fast-food outlets has normalised their unhealthy food in our diets alongside increasing rates of diet related chronic disease. Fast-food outlets sell predominantly unhealthy, highly processed food and drinks packed full of added salt, fat and sugar. These products are typically for immediate consumption, often through drive-throughs, in single-use takeaway containers, and usually consumed away from the premises.

In this report Cancer Council WA investigated why fast-food outlets are having such an impact on our diets in Western Australia (WA) and found it's not just what is on the menu. The fast-food industry in Australia is a multibillion dollar sector. The top five fast-food brands in WA are McDonald's, KFC, Hungry Jack's, Domino's Pizza and Subway, which together make up over 50 per cent of the 2025 market share within the entire fast-food and takeaway food service industry. Together these five brands have a combined revenue of over \$13 billion in Australia.

Collectively these five brands operate 437 outlets across WA. Each brand has its own mobile app, which includes discounts, promotions, loyalty rewards, and a variety of food ordering and delivery options. They are available on third-party delivery services including Uber Eats, MenuLog and DoorDash. They are open for long periods, often 24 hours, with breakfast and all-day menus to entice customers at any time of day. These factors ensure widespread, highly visible accessibility.

It's estimated that these five brands purchased \$15 million on advertising space in WA across television, press, radio, out-of-home and cinema in the financial year ending June 2024. This figure would be much larger if other types of advertising such as digital, social and sponsorships were included. All have a significant social media presence, using celebrity endorsements and competitions to boost engagement. Four of the five brands have a sponsorship arrangement with a high-profile national Australian sporting league and state teams playing in these national leagues. In one case, their presence in sport extended to junior players through grants for junior sports clubs.

Four of the five top fast-food brands provided children's menus and two included toys with the children's meal. Furthermore, as part of their corporate social responsibility efforts to build a positive brand image, all five fast-food brands were involved in charities focused on children's health.

The business practices of the top fast-food companies have a major influence in shaping our local food systems. Their pervasive presence in our communities ensures that fast-food brands and the food and drinks they sell are the most available, accessible, promoted, and recognised. While business booms for the top five brands, it's the diets and health of West Aussies that ultimately pay the price. It is time to prioritise community health and nutrition over the profits of the fast-food industry.

Priority actions that would make a real impact on increasing healthy eating and improving health are:

1. Protect children from unhealthy food and drink marketing exposure.

The WA Government can implement a healthy advertising policy to restrict unhealthy food and drink advertising from its own assets. This means public infrastructure including buses, train stations, and billboards in public open spaces will be free from fast-food advertising.

2. Limit where new fast-food outlets are allowed to open, particularly near schools.

WA's planning frameworks fail to effectively proscribe or refuse the establishment of new drive-through fast-food outlets. This means there are too many fast-food outlets approved next to homes and schools, often despite significant community objection. Urgent reform of WA's planning laws is required, particularly regarding land-use policies and schemes that control where new fast-food outlets can open.

3. Create standards for sports sponsorships that protect participants, supporters and viewers from unhealthy brand exposure.

Sport at all levels in Australia inspires us to live well, be active and connect with others. This is being undermined by fast-food companies using sport to promote their brands. Setting standards that control the extent to which community are exposed to unhealthy brand marketing via sports sponsorships of teams, leagues and broadcasts is required so we can enjoy the full potential of being involved in sport.

It's not just what's on the menu
WA's biggest fast-food brands

The Audit.



THE AUDIT

Cancer Council WA conducted an audit into the business practices of the leading fast-food companies by market share in Western Australia's fast-food and takeaway food service industry. As some fast-food companies operate more than one fast-food chain, further analysis focused on the five fast-food brands with the highest number of outlets in WA within these companies.

The audit methodology is described in Table 1.

Table 1. Methodology for business practice audit

What we looked at	How we did this
Market overview	• Market share: Percentage of total sales in the fast-food and takeaway service industry generated by each fast-food company. ◦ "Fast-food and takeaway services" are defined as businesses that primarily offer fast-food, such as burgers, pizza, sandwiches, and sushi, for immediate consumption or takeaway. • Revenue: Total money generated from normal business operation. *Market share and revenue data were sourced from IBISWorld.¹
Accessibility and availability	• Number of outlets: Number of operational outlets in Australia and WA. Number of outlets were recorded in September 2024 using data from ScrapeHero.² • Brand Apps: Features of the mobile apps, including: ◦ Discounts and promotions offered. ◦ Loyalty reward programs. ◦ Options for ordering, delivery, and pick-up via the app. • Third-party food delivery services: Availability of fast-food brands on third-party food delivery services such as Uber EATS, MenuLog*, and DoorDash. • Service hours: Availability of breakfast and all-day menus were used as indicators of opening hours. I.e. all-day promotions indicating long store opening hours.²
Marketing practices	• Advertising space spend: Advertising space spend in WA across television, press, radio, cinema, and out-of-home channels between June 2023 and July 2024, using data from Nielsen Ad Intel.³ • Social media presence: The number of followers for each fast-food brand on Facebook, TikTok and Instagram (recorded September 2024). • Social media engagement: The use of celebrity endorsements, challenges and competitions. • Sports sponsorship: Identification of at least one sponsorship with a national leagues and/or state team in a national league.
Children-directed marketing and appeal	• Children's menus and toys: The availability of a children's menu and promotional toys offered by each fast-food company. • Formal complaints: Complaints lodged with Ad Standards regarding advertisements from the fast-food company.
Public relations (PR) tactics	• Philanthropic initiatives: Charitable activities and philanthropic initiatives, as listed on brand websites.
Health and nutrition	• Health Star Rating: The average Health Star Rating of the fast-food brand's products, sourced from the FoodSwitch report by the George Institute for Global Health.⁴

*MenuLog is no longer in operation as of 26 November 2025

**It's not just what's on the menu
WA's biggest fast-food brands**

Findings.

FINDINGS

Our analysis identified the largest fast-food companies in Australia by market share for 2025, ranked as follows:

1. McDonald's
2. Competitive Foods (operates Hungry Jack's)
3. Yum! Restaurants Australia (operates KFC)
4. Domino's Pizza
5. Craveable Brands (operates Oporto, Red Rooster and Chicken Treat)
6. Collins Foods (operates KFC and Taco Bell)
7. Subway

Both Craveable Brands and Collins Foods manage multiple fast-food brands, while KFC is operated by both Yum! Restaurants and Collins Foods.

The big five: Top fast-food brands in the industry

Within these companies, **McDonald's**, **KFC**, **Hungry Jack's**, **Domino's Pizza**, and **Subway** had the largest market share and number of stores in WA and Australia (see Figure 1 and Figure 3).

See Appendix for a breakdown of business practices for each fast-food brand.

Market overview

Just five fast-food brands account for over 50 per cent of the Australian fast-food and takeaway service industry market share. McDonald's alone holds over 20 per cent of the market (Figure 1).

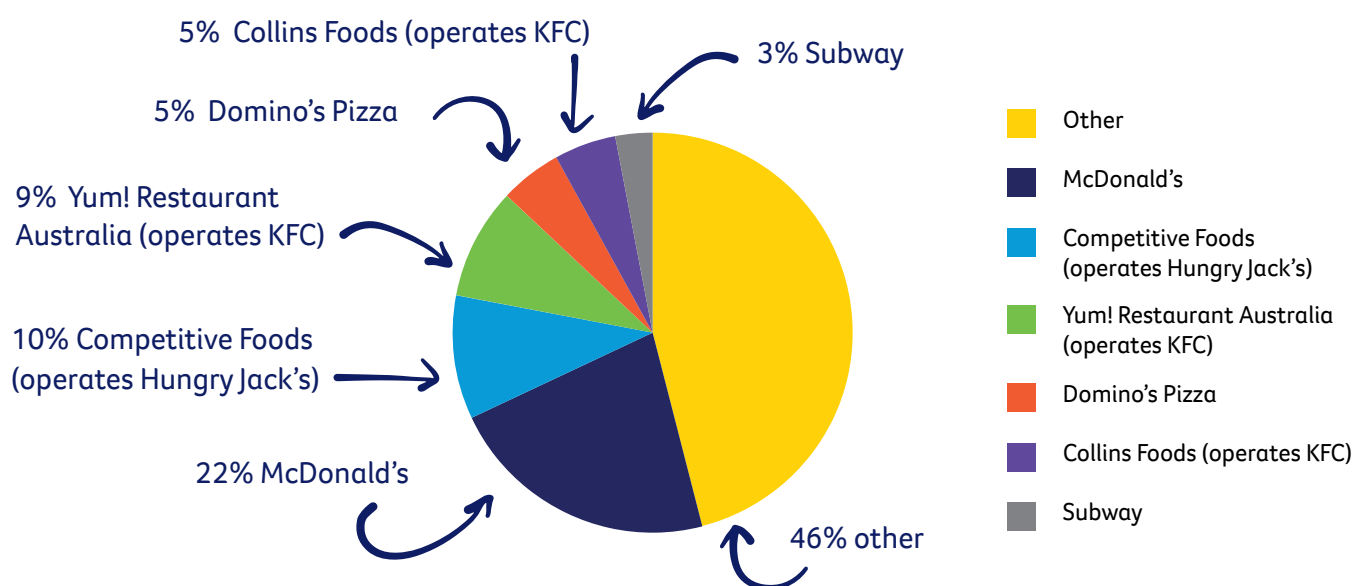


Figure 1. Market share of major fast-food companies in Australia, 2025.

The combined annual revenue of the companies operating the five top fast-food brands in Australia is over \$13 billion dollars, with McDonald's having the largest revenue of \$5.7 billion annually.

Figure 2 shows the annual revenue of each company.

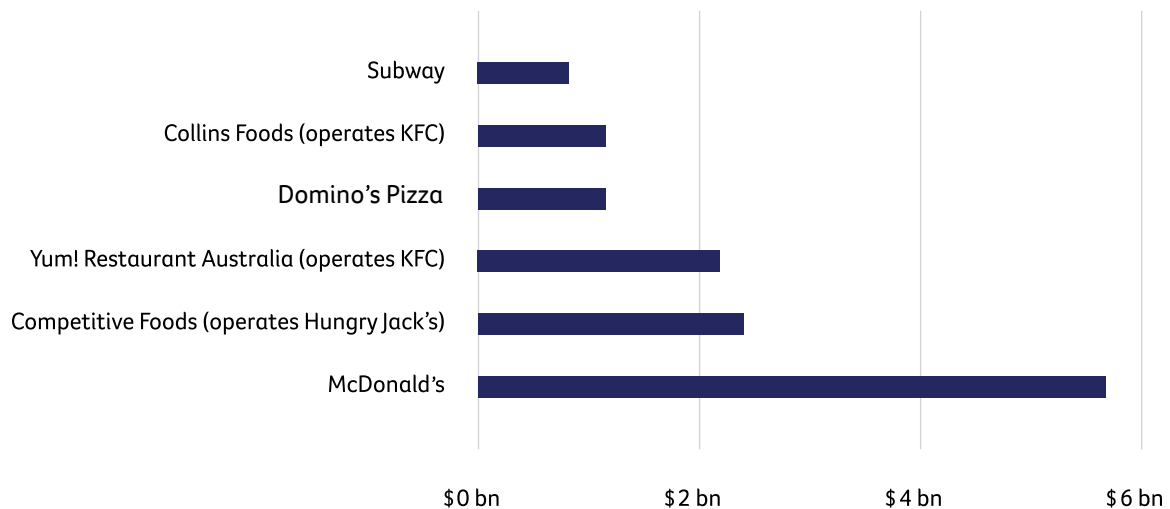


Figure 2. Annual revenue of major fast-food companies in Australia, 2025.

Accessibility and availability

Subway, followed by McDonald's, KFC, Domino's Pizza and Hungry Jack's had the largest number of stores in WA and Australia as seen in Figure 3.

Together, these five brands operate 437 outlets across WA and 4240 nationwide.

Number of operating fast food outlets

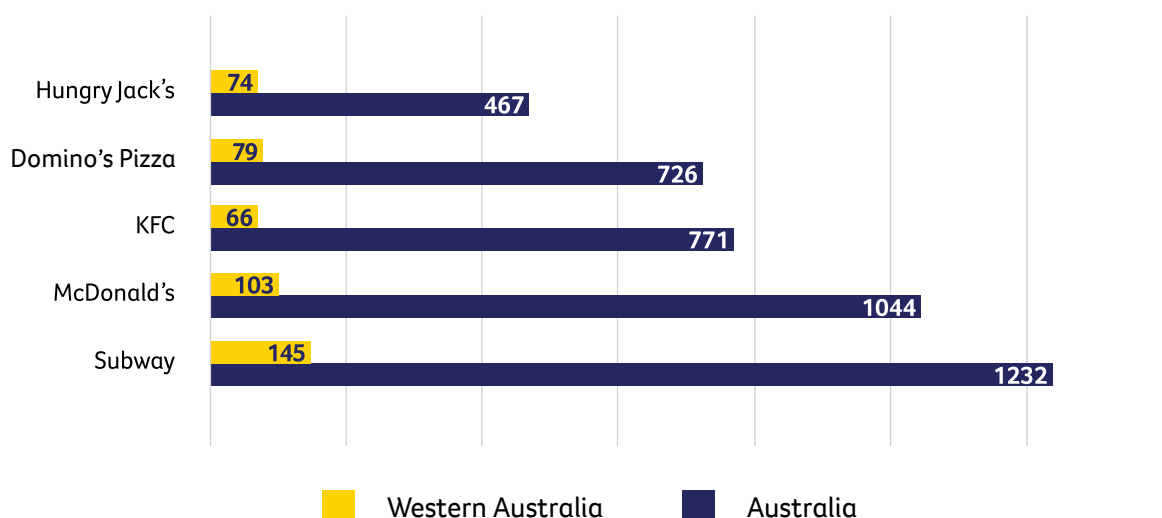


Figure 3. Number of operating fast-food outlets in Australia and WA, September 2024.

Three of the five brands promoted long opening hours through their menus. McDonald's, Hungry Jack's, and Subway all offered breakfast menus, with McDonald's and Hungry Jack's promoting an additional "all-day menu" for items available round the clock.



All five fast-food brands have mobile apps which offer discounts and promotions, loyalty reward programs, and the ability to place orders online for both delivery and pick-up through the app.



Additionally, all five brands are available across Uber EATS, MenuLog, and DoorDash for third-party food delivery.

Marketing practices

Between July 2023 and June 2024, the five fast-food brands collectively spent almost **\$15 million** on advertising space across television, radio, print, out-of-home, and cinema channels in WA (Figure 4).

This figure does not include digital, sponsorships, social media, or any other type of advertising (such as collaborations). Nor does it include the cost to produce the advertising assets. As such, **it is only a fraction of the amount fast-food companies spend advertising their products and brand.**

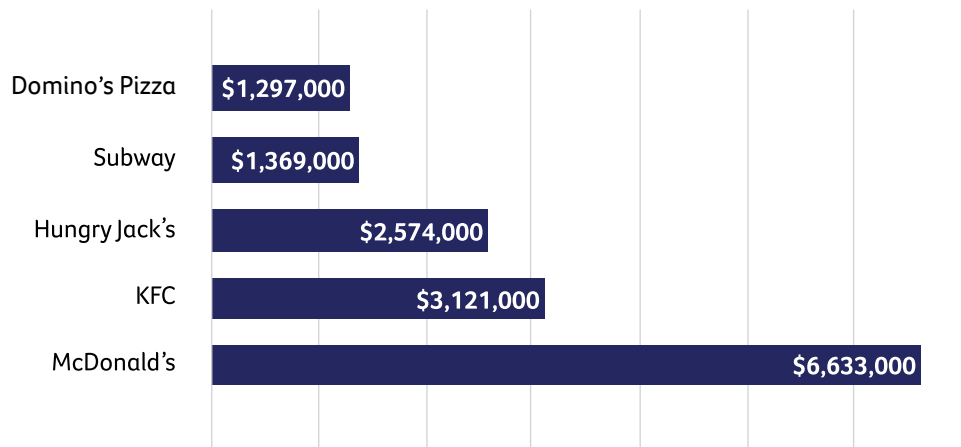


Figure 4. Total advertising space spend of Domino's Pizza, Subway, Hungry Jack's, KFC, and McDonald's in WA, July 2023 – June 2024 across television, radio, print, out-of-home, and cinema channels.

Nearly three-quarters of the total spend allocation of the five fast-food brands was spent on metropolitan television, followed by out-of-home advertising as seen in Figure 5.

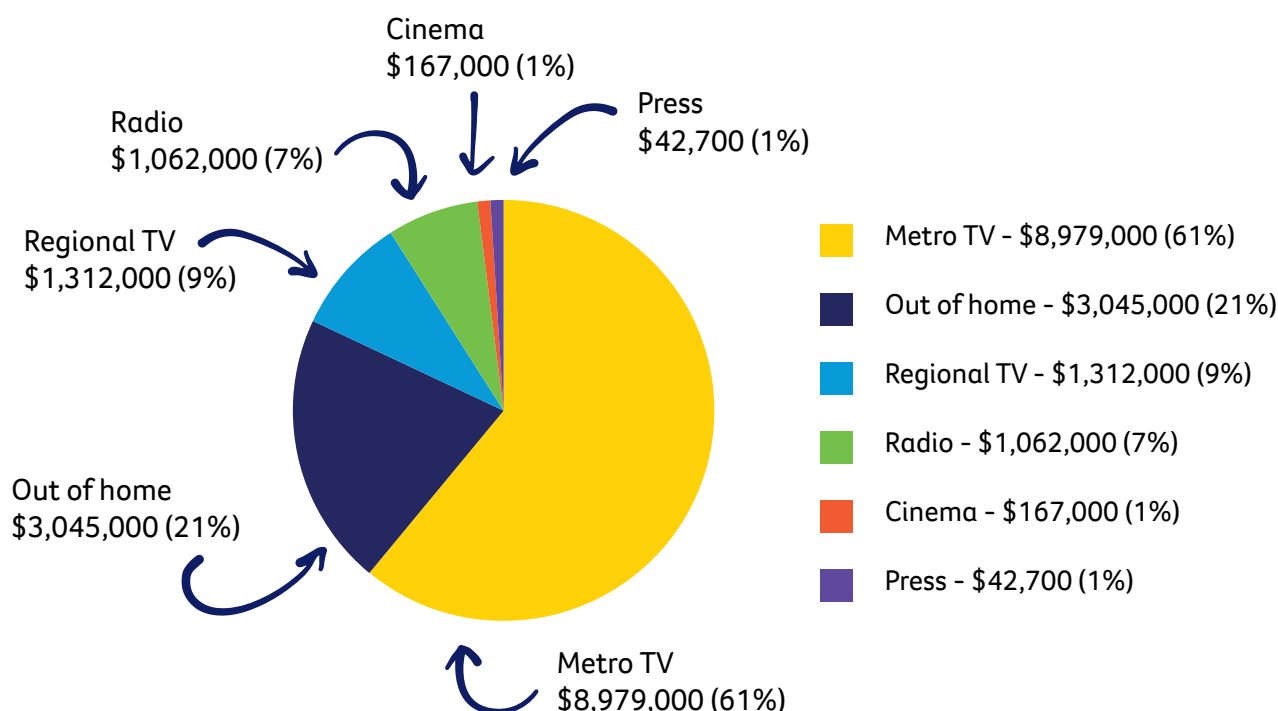


Figure 5. Breakdown of advertising space spend across channels by McDonald's, Hungry Jack's, KFC, Domino's Pizza, and Subway in WA (July 2023 – June 2024).

Social media was employed for marketing and promotion. All five brands have a significant social media presence on Facebook, TikTok and Instagram. These brands often had both Australian and global profiles as shown in Figure 6. Collectively they amassed 84.5 million followers on Facebook, 628.2 thousand on Instagram and 740.3 thousand on TikTok in Australia.

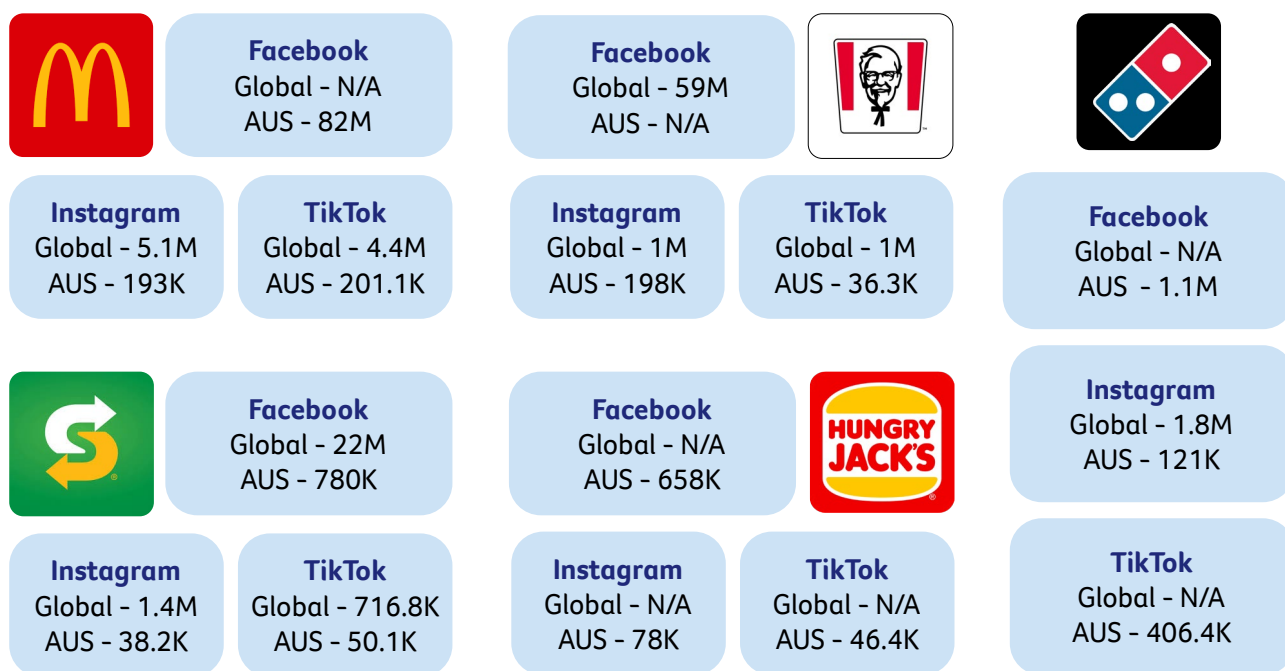


Figure 6. Number of followers Facebook, TikTok and Instagram

Each of these fast-food companies used either celebrity endorsements, challenges, or competitions to drive engagement. Domino's Pizza was the only brand that did not sponsor a sports team or league. However, **all five brands heavily utilised sports as part of their social media engagement practices** (see Appendix for examples).



Child-directed marketing and appeal

Four of the five fast-food companies (excluding Domino's Pizza) offered a children's menu. Two (McDonald's and Hungry Jack's) included a promotional toy with kid's meals.

Both McDonald's and Subway received formal complaints via Ad Standards for targeting children in the advertisement of discretionary food products. Both complaints were for free-to-air TV advertisements. Ad Standards upheld one of the complaints, while the other was dismissed (see Appendix).

Public relations

All five fast-food companies had an associated charity or philanthropic initiative, with four of the five brands specifically focusing on improving health and wellbeing in children and young people, and one brand focusing on improving nutrition and food security.

Health and nutrition

Across the brands, the average Health Star Rating was between 2.5 to 3.3 out of a total five stars. A score below 3.5 is generally considered to be a less healthy option, indicating higher amounts of salt, sugar, saturated fat, and lower amounts of fibre, vegetables, protein and beneficial nutrients. These average Health Star Ratings indicate that the food and drinks offered by the brands with the highest market share and revenue in Australia are primarily unhealthy.

Average Health Star Rating by fast-food brand:



Hungry Jack's



McDonald's



KFC



Domino's Pizza



Subway

Table 2. Summary of market overview, availability and accessibility and marketing practices of each fast-food brand

Fast-food Company		McDonald's	KFC*	Hungry Jack's**	Domino's Pizza	Subway
What we looked at						
Market share		22.5%	14%*	9.5%	4.9%	3.3%
Revenue		5.7bn	3.4bn	2.4bn	1.2bn	838.3m
Availability and accessibility						
#No. of stores WA		103	66	74	79	145
#No. of stores AU		1044	771	467	726	1232
Store App		✓	✓	✓	✓	✓
Third-party App		✓	✓	✓	✓	✓
Service hours	Breakfast menu	✓	✗	✓	✗	✓
	All-day menu	✓	✗	✓	✗	✗
Marketing Practices						
Advertising space spend		\$6,633,000	\$3,121,000	\$2,574,000	\$1,297,000	\$1,369,000
Social media followers (Australian and Global)	Facebook	82m - AU	59m - AU	658k - AU	1.1m - AU 21m - Global	82m - AU 22m - Global
	Instagram	193k - AU 5.1m - Global	198k - AU 1.8m - Global	78k - AU	121k - AU 1.8m - Global	38.2k - AU 1.4m - Global
	TikTok	201.1k - AU 4.4m - Global	36.3k - AU 1m - Global	46.4k - AU	406.2k - AU 1.1m - Global	50.1k - AU 716k - Global
Social media Engagement	Endorsements	✓	✓	✓	✓	✓
	Competitions	✓	✓	✓	✓	✓
Sports sponsorships	League	✓	✓	✓	✗	✓
	Team	✓	✓	✓	✗	✓
Child-directed marketing and appeal						
Children's menu		✓	✓	✓	✗	✓
Toys		✓	✓	✓	✗	✗
Ad complaints		✓	✗	✗	✗	✓
Public Relations						
Charities and initiatives		✓	✓	✓	✓	✓

*operated by Yum! Restaurants Australia and Collins Foods - revenue and market share is a combined total for the two companies and also includes Taco Bell

**operated by Competitive Food

**It's not just what's on the menu
WA's biggest fast-food brands**

Discussion.

DISCUSSION

This audit has demonstrated the dominance of the major fast-food chains in WA and exposed their business practices. Fast-food outlets are the most common type of food service outlet found in Perth, making up 40.5 per cent of all food service outlets. Of these, one in three belongs to a major chain.⁵ Children are frequent consumers of fast-food. In 2023, over half (52 per cent) of children ate food from fast-food outlets at least weekly and 37.2 per cent of adults in Western Australia at least weekly.^{6,7} Almost 60 per cent of young males aged 16–44 years ate from fast-food outlets at least weekly.⁶

The availability and accessibility of these fast-food brands means they are often the closest option, always open, and accessible without the need to leave the car or home. All the fast-food brands included in our analysis collectively operate hundreds of outlets across WA. These outlets are open throughout the day, with many operating 24 hours a day, seven days a week, offering both special breakfast and all-day menus. Their locations are in high exposure areas, with research finding Perth schools on average have two unhealthy food outlets within 400 metres of schools and twice as many fast-food outlets in disadvantaged areas compared to the more advantaged.⁸ Furthermore, Perth research shows that when fast-food outlets are next to schools, school children eat it. The frequency of their fast-food consumption was associated with the availability of the top fast-food outlets at distances up to 1km away.⁸

These fast-food brands are also spending millions of dollars in advertising space across WA. In the data we have access to (our data does not include digital, social or sponsorships) we found that after television, fast-food companies allocate the most advertising space spend to out-of-home advertising. As a result, families and children are regularly exposed to advertisements for unhealthy food and drinks as they go to and from school, and during their daily routines. Much of this advertising space is on local or state government property including bus shelters, main road billboards and train stations.

The digital age has introduced new channels to extend their influence. Not only are they available on third-party delivery services such as Uber Eats, MenuLog, and DoorDash, but they also operate mobile apps that offer online ordering functions, promotions, and deals. Their social media presence is significant, with each brand amassing millions of followers across Facebook, TikTok, and Instagram. Through competitions and partnerships with high profile athletes and sport teams, these brands engage users extensively to promote their unhealthy products. This is an effective marketing strategy, as children who interact with food brands online are more likely to consume unhealthy products from these brands.⁹

Four of the five brands have sports sponsorships with high-profile Australian teams and leagues at the national level. These sponsorships ensure prominent visibility of their logos during sports broadcasts, such as McDonald's Golden Arches on LED signage at AFL matches and Hungry Jack's branding on NBL player uniforms. This allows them to reach millions of sports fans, many of whom are young viewers, further embedding these brands into the sporting experience. Sport sponsorships not only increase brand awareness but improve brand image through its positive association with our favourite teams – children are especially susceptible to such marketing.¹⁰

Children are directly targeted through children's menus and promotional toys, as demonstrated by four of the five fast-food brands analysed. These tailored menus and toys serve as strategic tools to attract children and incentivise repeat visits, fostering brand loyalty from a young age. Other tactics aimed at children and families include McDonald's Play Spaces, which features an indoor playground for children. McDonald's also have a Junior Sports Club Grant program, providing children with McDonald's branded uniforms and equipment – a strategy employed to associate their brand with positive activities such as youth sports, team participation, and fitness.

Our analysis identified two case reports on Ad Standard's official website concerning unhealthy food advertisements targeting children, with only one complaint upheld. McDonald's was found in breach of the Australian Association of National Advertisers (AANA) Food and Beverage Advertising Code in July 2024 for airing an advertisement featuring children dressed as Minions. The second complaint, lodged in January 2024, involved a Subway advertisement featuring a Christmas elf, however this complaint was dismissed by the Ad Standards Community Panel. These inconsistent outcomes underscore the limitations of Australia's self-regulatory advertising system, which permits breaches without meaningful consequences.

Public relations tactics such as philanthropic efforts are used to maintain their social licence to operate while deflecting public backlash for their negative influence on community health. Each of the five fast-food brands analysed supports at least one charity or community initiative related to children's health, including McDonald's Ronald McDonald House, Hungry Jack's Make-A-Wish, the KFC Youth Foundation, Domino's Minds and Meals, and the Subway Cares Foundation.

Ultimately, through their business practices, the top fast-food chains exert considerable influence on our local food systems. These chains control the outlets and food and drink products that are available, accessible and advertised in our everyday lives to the extent they have become normalised. Transitioning West Aussies towards healthy, sustainable dietary patterns so they live in the best possible health and quality of life requires creating supportive communities that are protected from pervasive fast-food operations.

What can we do?

Implementing policies to increase healthy eating and setting standards to protect community health requires cooperation between government agencies and action from all levels of government.

In WA, the Sustainable Health Review recommended two actions that will address the influence of fast-food marketing practices and operations on community health in WA.¹¹

- **Implement a policy to restrict unhealthy food and drink advertising on WA government-owned and managed properties.** Currently, public infrastructure—including buses, train stations, and billboards in public open spaces—frequently display advertisements from major fast-food brands. Economic modelling demonstrates that such a policy would be both cost-effective and health-promoting.¹²
- **Reform WA planning laws to limit unhealthy food outlets in sensitive land-use areas, particularly schools.** Previous research has found that fast-food outlets pose the highest public health risk of all food service retailers considering factors such as availability, appeal, and accessibility of unhealthy foods.¹³ In addition, Cancer Council WA's analysis of six years' worth of planning applications for new drive-through fast-food outlets in WA found that Perth residents overwhelmingly oppose new fast-food outlets being built in their neighbourhoods.¹⁴

Creating healthier sport will require collaborative action. Setting standards for the extent to which elite and professional sports, community sports and arts and cultural events have fast-food brands exposure via sponsorship of leagues, events, teams and broadcasts is urgent. Sport sponsorship is an effective and core marketing strategy for fast-food companies and undermines the positive potential of sport to promote good health and well-being. This requires action across all levels of government.

Now more than ever, it is critical that community health is prioritised over the interests and profits of large, transnational fast-food corporations. There is an urgent need for government-led regulations to manage and mitigate the impact of their business practices.

REFERENCES

1. IBISWorld. Fast Food and Takeaway Food Services in Australia Fast Food and Takeaway Food Services in Australia [Industry Report]. Melbourne; 2024 Aug.
2. ScrapeHero [Internet]. Location Intelligence Reports: Number of McDonald's restaurants in Australia in 2024; 2024. Available from: <https://www.scrapehero.com/location-reports/McDonald%27s-Australia/>
3. Nielsen Ad Intel. Ad Spend. Nielsen; 2024.
4. The George Institute for Global Health, Howes K, Shahid M, Jones A, Taylor F, Dunford E, et al. FoodSwitch: State of the Fast Food Supply 2020. 2020 May.
5. Pulker CE, Butcher LM, Klug F, Whitton C, Trapp GSA. A cross-sectional audit of the Australian community food environment highlights the prominent role of chain food outlets. Discover Food [Internet]. 2025 Dec 1 [cited 2025 Jun 25];5(1):1–17. Available from: <https://link.springer.com/article/10.1007/s44187-025-00342-5>
6. Epidemiology Directorate. Health and wellbeing of children in Western Australia 2023. 2025.
7. Epidemiology Directorate. Health and Wellbeing of Adults in Western Australia 2023. 2025.
8. Cancer Council Western Australia. Discussion Paper. School sites and unhealthy food outlets [Internet]. BMJ Publishing Group; 2024 Jun. Available from: https://cancerwa.asn.au/assets/public/2024/06/Discussion-paper-school-sites-and-unhealthy-food-outlets_Final.pdf
9. Baldwin HJ, Freeman B, Kelly B. Like and share: associations between social media engagement and dietary choices in children. Public Health Nutr. 2018 Nov 8;21(17):3210–5.
10. Boelsen-Robinson T, Thow AM, Lee N, Gill T, Colagiuri S. Gambling, fast food and alcohol sponsorship in elite sport – perspectives from Australian sporting fans. BMC Public Health. 2022 Nov 23;22(1):2155.
11. Sustainable Health Review. Sustainable Health Review: Final Report to the Western Australian Government. 2019.
12. Ananthapavan J, Angeles MR. Economic evaluation of the implementation of a policy to restrict unhealthy food and drink advertising on Western Australian (WA) state-owned assets [Internet]. Perth; 2023 Aug [cited 2025 Jun 20]. Available from: <https://cancerwa.asn.au/assets/public/2023/09/Economic-Evaluation-WA-Healthy-food-advertising.pdf>
13. Pulker CE, Trapp GSA, Fallows M, Hooper P, McKee H, Pollard CM. Food Outlets Dietary Risk (FODR) assessment tool: study protocol for assessing the public health nutrition risks of community food environments. Nutr J. 2020 Dec 12;19(1):122.
14. Cancer Council Western Australia. “We don’t need another Maccas”: How our local communities are taking on fast-food outlets in WA [Internet]. Perth; 2024 [cited 2025 Jun 20]. Available from: <https://cancerwa.asn.au/assets/public/2024/09/Advocacy-Report-Fast-Food-Outlets-We-dont-need-another-Maccas.pdf>
15. Australian Football League (AFL) [Internet]. 2021 [cited 2025 Jun 20]. McDonald's expands partnership with AFL to a new 10-year deal. Available from: <https://www.afl.com.au/news/677616/mcdonalds-expands-partnership-with-afl-to-a-new-10-year-deal>

16. MOS Editorial Team. Ministry of Sport . 2023 [cited 2025 Jun 20]. McDonald's Australia renews partnership with Australian Professional Leagues. Available from: <https://ministryofsport.com/mcdonalds-australia-renews-partnership-with-australian-professional-leagues/>
17. Freemantle Football Club. Freemantle Football Club. 2023 [cited 2025 Jun 21]. Fremantle McHappy to extend partnership. Available from: <https://www.fremantlefc.com.au/news/1472437/fremantle-mchappy-to-extend-partnership>
18. Advertising Standards Bureau. Ad Standards Community Panel Case Report: Case Report 0188/242024 [Internet]. [cited 2025 Jun 20]. Available from: https://adstandards.com.au/wp-content/uploads/2024/08/Final-Case-Report-0188-24_.pdf
19. Ronald McDonald House Charities Australia [Internet]. [cited 2025 Jun 20]. Ronald McDonald House Charities. Available from: <https://rmhc.org.au/>
20. Rory Jones. SportsPro. 2022 [cited 2025 Jun 20]. KFC to remain Big Bash League title sponsor until 2025. Available from: <https://www.sportspro.com/news/big-bash-league-wbbl-kfc-cricket-australia-title-sponsor-2025/>
21. National Rugby League (NRL) [Internet]. 2023 [cited 2025 Jun 20]. NRL extends KFC combo until 2027. Available from: <https://www.nrl.com/news/2023/02/27/nrl-extends-kfc-combo-until-2027/>
22. Edwards A. B&T. 2024. Spotlight On Sponsors: Collingwood Magpies Took Top Spot Last Year, But What Does That Mean For Sponsorship? Available from: <https://www.bandt.com.au/spotlight-on-sponsors-collingwood-magpies-took-top-spot-last-year-but-what-does-that-mean-for-sponsorship/>
23. KFC. The KFC Youth Foundation. Available from: <https://www.kfc.com.au/kfc-youth-foundation>
24. Edwards A. B&T. 2024 [cited 2025 Jun 20]. Spotlight On Sponsors: The Biggest & Boldest Deals Of 2024. Available from: <https://www.bandt.com.au/spotlight-on-sponsors-the-biggest-boldest-deals-of-2024/#:~:text=NBL%20x%20Hungry%20Jacks&text=The%20new%20deal%20will%20see,us%20through%20thick%20and%20thin>
25. Collins L. Ice Hockey News Australia. 2024 [cited 2025 Jun 20]. Hungry Jack's joins the AIHL Finals as a major sponsor. Available from: <https://icehockeynewsaustralia.com/2024/07/24/hungry-jacks-joins-the-aihl-finals-as-a-major-sponsor/>
26. Edwards A. B&T. 20246 [cited 2025 Jun 20]. Spotlight On Sponsors: West Coast Eagles Partnerships Remain Stable Despite Injury Uncertainty. Available from: <https://www.bandt.com.au/spotlight-on-sponsors-west-coast-eagles-partnerships-remain-stable-despite-injury-uncertainty/>
27. Domino's for good: Our Community [Internet]. Domino's Pizza Enterprises; [cited 2025 Jun 20]. Available from: <https://www.dominospizzaenterprises.com/dominos-for-good/#our-community>
28. Football Australia Media. Subway Socceroos. 2022 [cited 2025 Jun 20]. Football Australia and Socceroos score fresh partnership with Subway. Available from: <https://www.socceroos.com.au/news/football-australia-and-socceroos-score-fresh-partnership-subway#:~:text=The%20record%2Dbreaking%2C%20three%2D,Subway%20Young%20Socceroos%2C%20and%20Subway>
29. Adelaide Thunderbirds. Netball SA and Adelaide Thunderbirds announce partnership with Subway [Internet]. 2021 [cited 2025 Jan 21]. Available from: <https://adelaidethunderbirds.com.au/news/netball-sa-and-adelaide-thunderbirds-announce-partnership-subway>
30. Advertising Standards Bureau. Ad Standards Community Panel Case Report: Case Report 0289/23 [Internet]. [cited 2025 Jun 24]. Available from: <https://adstandards.com.au/wp-content/uploads/2024/02/0289-23.pdf>.

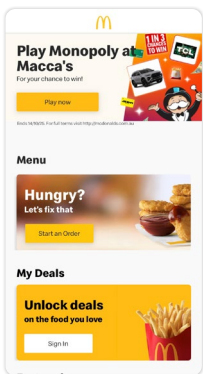
It's not just what's on the menu
WA's biggest fast-food brands

Appendix.

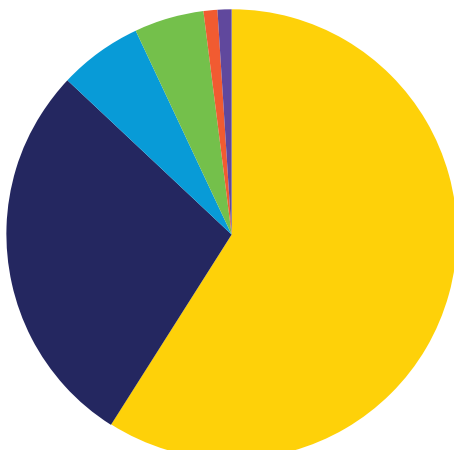


APPENDIX

McDonald's

Market Share						
Ranked		1 st in Australia's fast-food market share				
Market Share		22.5 per cent				
Revenue		\$5.7 billion (2025)				
Availability and accessibility						
 Figure 7. MyMaccas app home screen	Number of outlets		Australia: 1044 outlets			
			WA: 103 outlets			
	Mobile App (MyMaccas App)	✓ Discounts & promotions	✓ Loyalty rewards	✓ Online ordering option	✓ Delivery/pick up options	
	Third-party delivery service	✓ Uber Eats	✓ MenuLog	✓ DoorDash		
	Service hours and accessibility	✓ Breakfast menu				
		✓ All-day menu				
Marketing practices						
Social media presence	Facebook: McDonald's Australia - 82 million followers					
	TikTok:	@mcdonalds - 4.4 million followers, 31.5 million likes				
		@mcdonaldsau - 201.1k followers, 1.2 million likes				
	Instagram:	@mcdonalds - 5.1 million followers				
		@mcdonaldsau - 193k followers				

McDonald's advertising space spend in WA



Advertising Space	Amount	Percentage
Metro TV	\$3,705,000	59%
Out of home	\$1,747,000	28%
Regional TV	\$376,000	6%
Radio	\$302,000	5%
Cinema	\$77,000	1%
Press	\$42,700	1%

Figure 8. Total advertising space spend of McDonald's between July 2023 and June 2024 in WA.

Social media engagement



Figure 9. McDonald’s monopoly competition.
Source: McDonald’s Australia’s Instagram account.
Posted July 2024

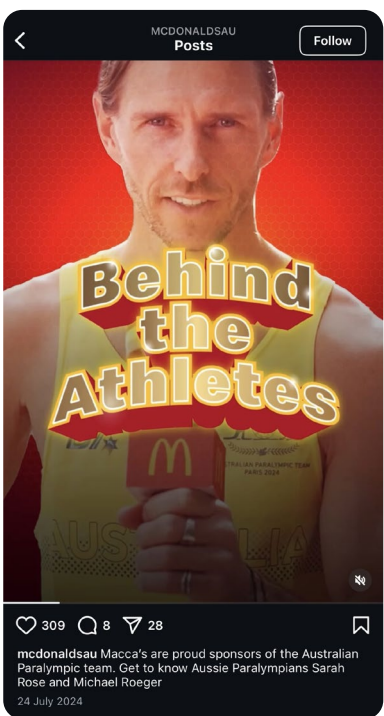


Figure 10. Featuring Australian athlete, Michael Roeger.
Source: McDonald’s Australia’s Instagram account.
Posted July 2024

Sports sponsorship

National league partnerships	Australian Football League (AFL)		Partnership with the AFL since 2014, extended in 2022 for another 10 years, the longest corporate partnership in AFL history. ¹⁵
	Australian Professional League (APL)		Partnership allows McDonald's to run the "Football. I'm Lovin' It" campaign, including naming rights for the Men's and Women's Match Centres, and LED signage at A-League Men's and Women's games. ¹⁶
State team partnerships	AFL Club Fremantle Dockers		McDonald's extended their partnership with the Fremantle Football Club until 2026, marking a decade-long deal starting in 2016. ¹⁷

Children-directed marketing and appeal

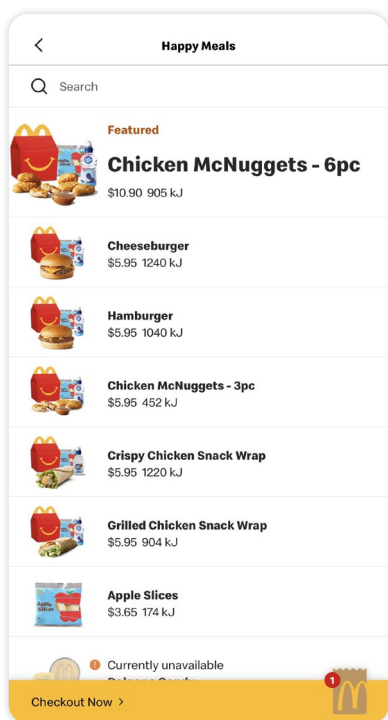


Figure 11. Happy Meals menu

✓ Children’s Menu

The Happy Meals campaign

“Play place” and birthday parties

✓ Promotional Toys

Offers a children’s menu with collectable toys and books often tied to popular children’s movie characters.

McDonald’s Playland (PlayPlace) is an indoor play area, and some locations host birthday parties with options like Happy Meal selection and party activities.

Formal complaints to Ad Standards



Figure 12. McDonald’s TV Advertisement Violating AANA Food and Beverages Advertising Code targeted children in breach of the advertising industry’s self-regulated guidelines.

On 24 July 2024, a McDonald’s TV advertisement featuring children dressed as Minions playing in a playground was found to breach the AANA Food and Beverages Advertising Code. The Ad Standards Community Panel determined that the product would have strong appeal to children, with visuals designed to engage them more than adults.¹⁸

PR tactics - Charities

The Ronald McDonald Charity (RMHC): Provides lodging, healthcare, and support services for families with children undergoing medical treatment. RMHC operates Ronald McDonald Houses, Family Rooms, and Care Mobiles offering support around accommodation, amenities, and healthcare services.¹⁹

Grants Macca’s Junior Sports Grants program provides grants to sporting clubs in regional WA.

APPENDIX

KFC

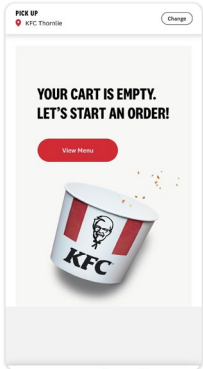
Market Share overview					
* KFC is operated by two entities, Yum! Restaurants Australia and Collins Foods					
Market Share	Yum! Restaurants Australia: 8.7 per cent		Market share combined: 14.4 per cent		
	Collins Food (KFC and TacoBell): 4.9 per cent				
Revenue	Yum! Restaurants Australia: 2.2 billion		Revenue combined: 3.4 billion		
	Collins Food (KFC and TacoBell): 1.2 billion				
Availability and accessibility					
	Number of outlets	Australia: 771 outlets			
		WA: 66 outlets			
	Mobile App (The KFC App)	✓ Discounts & promotions	✓ Loyalty rewards	✓ Online ordering option	✓ Delivery/ pick up options
	Third-party delivery service	✓ Uber Eats	✓ MenuLog	✓ DoorDash	
	Service hours and accessibility	✗ Breakfast menu			
		✗ All-day menu			
	Marketing practices				
Social media presence	Facebook: KFC - 59 million followers				
	TikTok:	@kfc - 1 million followers, 3.5 million likes			
		@kfcaustralia - 36.3k followers, 150.9k likes			
	Instagram:	@kfc - 1.8 million followers			
		@kfcaustralia - 198k followers			

Figure 13. KFC app home screen

KFC's advertising space spend in WA

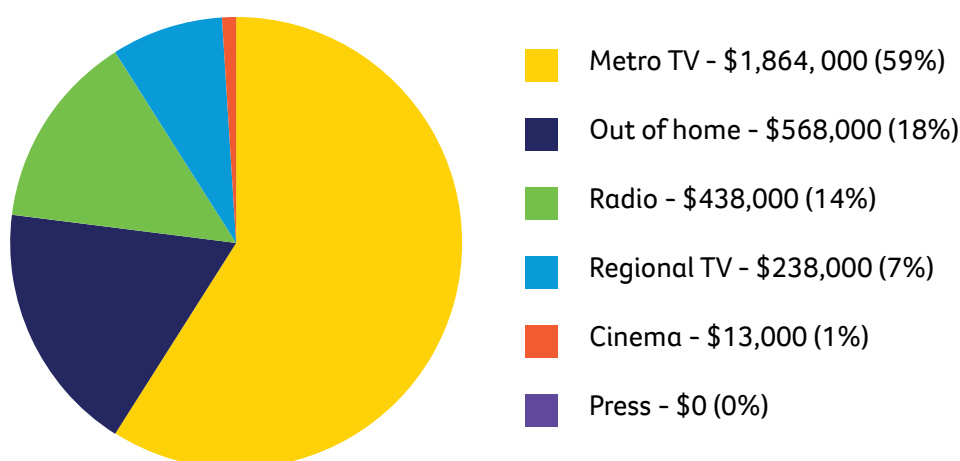


Figure 14. Total advertising space spend of KFC between July 2023 and June 2024 in WA.

Social media engagement



Figure 15. Collingwood players promoting KFC products with the caption, 'When KFC is your pre-game feed on grand final day.' Source: KFC Australia's TikTok account Posted September 2023



Figure 16. NRL grand final - Players from the Bulldogs and Manly participating in KFC's 'Bucket Catch' challenge. Source: KFC Australia's Instagram account Posted October 2024

Sports sponsorship

National league partnerships	Cricket Australia – Big Bash League (BBL) partnership		In 2022, KFC extended its partnership with Cricket Australia for a further three years, remaining the title sponsor of the BBL until the 2024/25 season. ²⁰
	National Rugby League		In 2023, KFC secured a five-year extension of its partnership with the NRL, running through to 2027. This includes major NRL assets such as the final series, grand finals, State of Origin, and the Australian Kangaroos and Jillaroos teams. ²¹
State team partnerships	AFL Club Collingwood Magpies		Since 2021, KFC has been a premier partner of the Collingwood Magpies, with the partnership set to continue until the end of the 2025 season. KFC's logo is featured on team jerseys and across member initiatives and match day events. ²²

Children-directed marketing and appeal

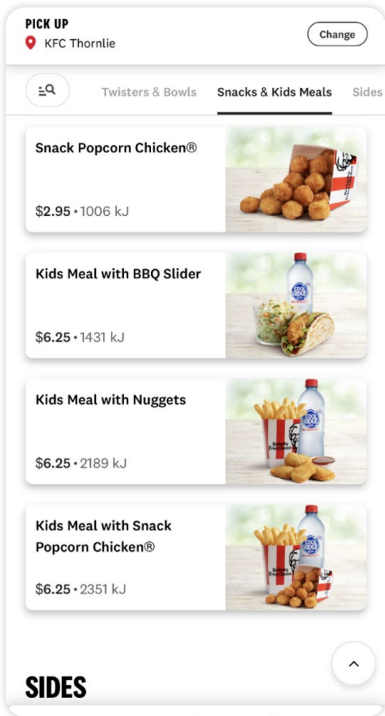


Figure 17. Children’s menu on the KFC app

✓ Children’s Menu	✗ Promotional Toys
Children’s menu	Kids meal with BBQ slider
	Kids meal with nuggets
	Kids meal with snack popcorn chicken.

PR tactics - Charities

KFC Youth Foundation: The KFC Youth Foundation partners with The Black Dog Institute and ReachOut Australia to provide online mental health services for young people, offering support, information and resources.²³

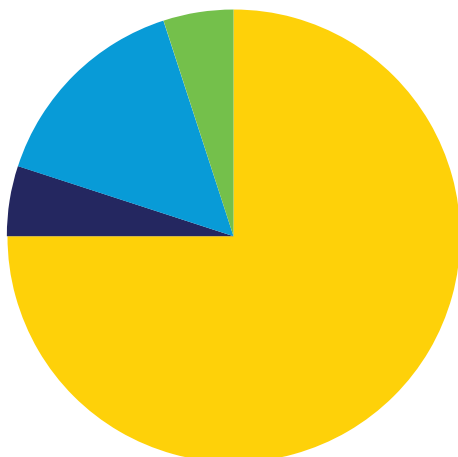
APPENDIX

Hungry Jack's

Market Share				
Hungry Jack's is operated by Competitive Foods				
Market Share		9.5 per cent		
Revenue		\$2.4 billion (2025)		
Availability and accessibility				
	Number of outlets		Australia: 467 outlets	
			WA: 74 outlets	
	Mobile App (MyHJ's app)	✓ Discounts & promotions through the 'Shake & Win' feature.	✓ Loyalty rewards	✓ Online ordering option
	Third-party delivery service	✓ Uber Eats	✓ MenuLog	✓ DoorDash
	Service hours and accessibility	✓ Breakfast menu		
		✓ All-day menu		
Marketing practices				
Social media presence	Facebook: Hungry Jack's® - 658,000 followers, 669,000 likes			
	TikTok:	@hungryjacksau - 46,400 followers, 522700 likes		
	Instagram:	@hungryjacksau - 78,000 followers		

Figure 18. Shake & Win feature only available on the MyHJ's app

Hungry Jack's advertising space spend in WA



Metro TV	\$1,914,000 (75%)
Regional TV	\$393,000 (15%)
Out of home	\$134,000 (5%)
Radio	\$133,000 (5%)
Cinema	\$0 (0%)
Press	\$0 (0%)

Figure 19. Total advertising space spend of Hungry Jack's between July 2023 and June 2024 in WA.

Social media engagement



Figure 20. Promotion of Hungry Jack's UNO prize pick. Source: Hungry Jack's TikTok account Posted August 2024

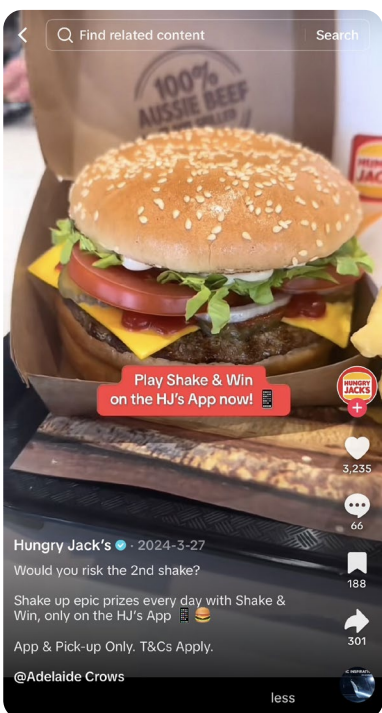


Figure 21. Promotion of the Shake & Win feature on the MyHJs app. Source: Hungry Jack's TikTok account Posted March 2024

Sports sponsorship

National league partnerships	National Basketball League (NBL) partnership		In 2024, Hungry Jack's and the National Basketball League announced an extension of their partnership until the end of the 2028/29 season, with Hungry Jack's continuing as a Naming Rights Partner. ²⁴
	Ice Hockey League (AIHL) partnership		Hungry Jack's sponsored the 2024 AIHL Final Series, which included branding across the O Brian Ice House and activations. ²⁵
State team partnerships	West Coast Eagles partnership		Hungry Jack's has maintained a long-standing partnership with the West Coast Eagles which spans over five decades. ²⁶

Children-directed marketing and appeal

KIDS →



Figure 22. Children's menu on the MyHJ's app

✓ Children's Menu

✓ Promotional Toys

Includes a randomly selected toy in every kids meal.

Children's menu

Cheeseburgers kid's pack

6 nuggets kid's pack

3 nuggets kid's pack

Hamburger kid's pack

PR tactics - Charities

Make a wish: Hungry Jack's partnership with Make-A-Wish began in 2017 to raise money for seriously ill children and teenagers in Australia. Donations can be made online through Hungry Jack's official website or directly in-store.

APPENDIX

Domino's Pizza

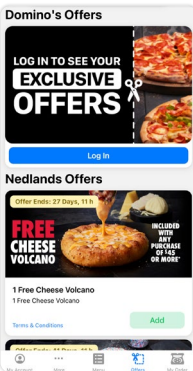
Market Share						
Market Share		4.9 per cent				
Revenue		\$1.2 billion (2025)				
Availability and accessibility						
	Number of outlets		Australia: 726 outlets			
			WA: 79 outlets			
	Mobile App (Domino's App)		✓ Discounts & promotions	✓ Loyalty rewards	✓ Online ordering option	✓ Delivery/pick up options
	Third-party delivery service		✓ Uber Eats	✓ MenuLog	✓ DoorDash	
	Service hours and accessibility		✗ Breakfast menu			
			✗ All-day menu			
	Marketing practices					
	Social media presence	Facebook	Domino's Pizza - 21 million followers			
			Domino's Australia - 1.1 million followers			
		TikTok:	@dominos - 1.1 million followers, 10.3 million likes			
@dominosau - 406.2 k followers, 8.2 million likes						
Instagram:		@dominos - 1.8 million followers				
		@dominos_au - 121k followers				

Figure 23. Domino's app home screen

Figure 23. Domino's app home screen

Domino's advertising space spend in WA

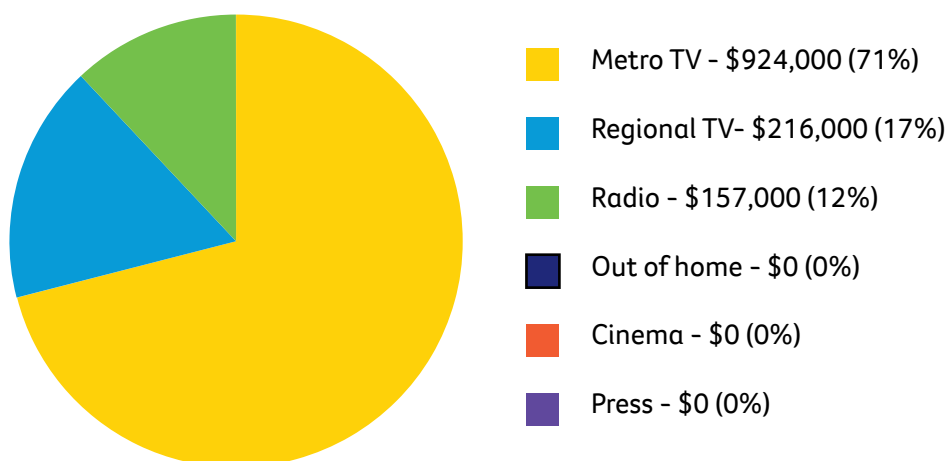


Figure 24. Total advertising space spend of Domino's Pizza between July 2023 and June 2024 in WA.

Social media engagement

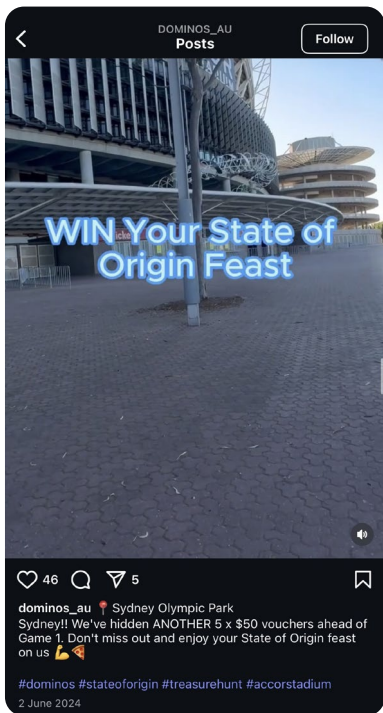


Figure 25. Chance to Win the ‘Ultimate Footy Giveaway’ Including a 75-Inch TV and One Year’s Worth of Domino’s Pizza. Source: Domino’s Australia Instagram account Posted June 2024



Figure 26. Post featuring NRL legend Gordie Tallis asking, ‘What is your favourite Domino’s pizza?’ Source: Domino’s Australia Instagram account Posted March 2024

Children-directed marketing and appeal

✗ Children’s Menu

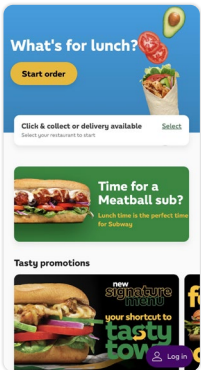
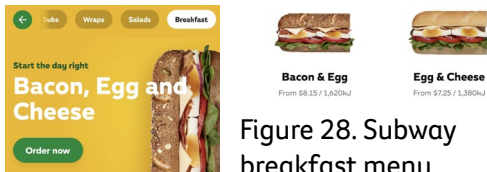
✗ Promotional Toys

PR tactics - Charities

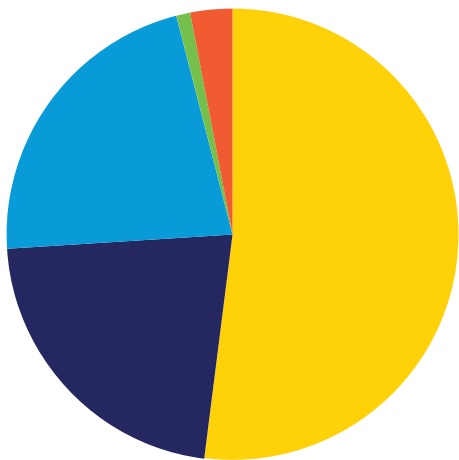
Minds & meals was established in 2024 and focuses on supporting youth mental health through partnerships with headspace in Australia and Youthline in New Zealand, as well as providing disaster relief.²⁷

APPENDIX

Subway

Market Share					
Market Share		3.3 per cent			
Revenue		\$838.3 million (2025)			
Availability and accessibility					
	Number of outlets	Australia: 1232 outlets WA: 103 outlets			
	Mobile App (MyMaccas App)	✓ Discounts & promotions	✓ Loyalty rewards	✓ Online ordering option	✓ Delivery/ pick up options
	Third-party delivery service	✓ Uber Eats	✓ MenuLog	✓ DoorDash	
	Service hours and accessibility	✓ Breakfast menu	 Figure 28. Subway breakfast menu		
		✗ All-day menu			
Marketing practices					
Social media presence	Facebook:	Subway - 22 million followers			
		Subway Australia - 780,000 followers			
	TikTok:	@subway - 716.8k followers, 7.4 million likes			
		@subwayaustralia - 50.1k followers, 374.2k likes			
	Instagram:	@subway - 1.4 million followers			
		@subway_australia - 38.2k followers			

Subway advertising space spend in WA



Metro TV	- \$572,000 (52%)
Out of home	- \$596,000 (22%)
Regional TV	- \$89,000 (22%)
Cinema	- \$77,000 (3%)
Radio	- \$32,000 (1%)
Press	- \$0 (0%)

Figure 29. Total advertising space spend of Subway between July 2023 and June 2024 in WA

Social media engagement



Figure 30. Post offering supporters the chance to enter for a chance to watch the Socceroos pre-match warm-up. Source: Subway Australia Instagram account Posted February 2024



Figure 31. Post featuring the Matilda's promoting the subway footlong with 'Tillies are feeling good.' Source: Subway Australia Instagram account Posted February 2024

Sports sponsorship

National league partnerships	Football Australia		Subway entered a three-year partnership with Football Australia in 2022, securing naming rights to the national Senior Men's Football team, the Socceroos, and other national teams, including the Olyroos, Young Socceroos, and Joeys. ²⁸
State team partnerships	Adelaide Thunderbirds		Adelaide Thunderbirds: Since 2021, Subway has been a principal partner of Netball SA and the Adelaide Thunderbirds. ²⁹

Children-directed marketing and appeal		
 Leg Ham Mini Sub	✓ Children's Menu	✗ Promotional Toys
	The Kids Pak menu	Leg ham mini sub
		Turkey mini sub
		Veggie delite with avo mini sub
Formal complaints to the Ad Standards		
	In January 2024, the Ad Standards Community Panel received a formal complaint regarding a subway advertisement targeting children, as it featured a Christmas elf reaching over a counter to grab subway cookies. Unfortunately, the Ad Standards Community Panel dismissed the complaint and sided with Subway. ³⁰	

Figure 32. Subway advertisement subjected to a formal complain to ad standards for targeting children

PR tactics - Charities
Subway Cares Foundation is a global non-profit supporting food security, education, and community initiatives. It includes the Subway Fresh Start Scholarship Program, offering tuition assistance to restaurant team members pursuing higher education.