



# FAST FOOD facts.

Food Advertising to Children and Teens Score

# 2021



**Fast food advertising:  
Billions in spending, continued  
high exposure by youth**



UCONN  
**RUDD CENTER**  
FOR FOOD POLICY & OBESITY

## FAST FOOD **FACTS** 2021

Fast food advertising:  
Billions in spending, continued high exposure by youth

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**Fast-food consumption among youth remains a significant public health concern. The findings in this report demonstrate that fast-food advertising spending increased from 2012 to 2019; youth exposure to TV ads declined, but at a lower rate than reductions in TV viewing times; many restaurants continued to disproportionately target advertising to Hispanic and Black youth; and restaurants did not actively promote healthier menu items. Restaurants must do more to reduce harmful fast-food advertising to youth.**

Excessive consumption of fast food is linked to poor diet and weight outcomes among children and teens,<sup>1</sup> and consumption of fast food by children and teens has increased over the past decade.<sup>2</sup> On a given day, one-third of children and teens eat fast food, and on those days they consume 126 and 310 additional calories, including more sugary drinks, compared to days they do not eat fast food.<sup>3</sup> Moreover, fast-food consumption is higher for Hispanic and non-Hispanic Black teens, who also face greater risks for obesity and other diet-related diseases, compared to non-Hispanic White teens.<sup>4,5</sup>

While many factors likely influence frequent fast-food consumption by children and teens,<sup>6-8</sup> extensive fast-food advertising is a major contributor.<sup>9</sup> Frequent and widespread exposure to food marketing increases young people's preferences, purchase requests, attitudes, and consumption of the primarily nutrient-poor energy-dense products promoted.<sup>10-12</sup> Fast food is the most frequently advertised food and beverage category to children and teens, representing 40% of all youth-directed food marketing expenditures<sup>13</sup> and more than one-quarter of food and drink TV ads viewed.<sup>14</sup> In May 2010, the World Health Assembly unanimously adopted a set of recommendations to reduce the marketing of unhealthy food and beverages to children up to age 17 and urged their adoption by governments.<sup>15</sup>

Therefore, limiting fast-food marketing to youth is a key public health strategy to address poor diet among young people. Fast-food restaurants have responded to public health concerns by introducing healthier menu items, including kids' meal sides, and removing soda from kids' meal menus. Some restaurants have also pledged to advertise only healthier items directly to children. However, it is unknown if the amount of fast-food advertising to children and teens has changed or if restaurants have also begun to promote healthier menu options in their advertising. Independent research is necessary to continue to monitor fast-food restaurant advertising to children and teens.

This report follows up on our Fast Food FACTS 2013<sup>16</sup> report and provides current data on fast-food advertising to children, teens, and Black and Hispanic youth.

### Methods and scope

Using Nielsen data, we document 2019 advertising spending and TV advertising exposure for all fast-food restaurants, including detailed analyses of the 27 top fast-food advertisers with the highest advertising spending in 2019 and/or that targeted TV advertising to children, Hispanic, and/or Black consumers. We evaluate changes from previous years, documented in our previous Fast Food FACTS report,<sup>17</sup> when available.

Analyses include:

- Advertising spending in all measured media (including TV, radio, outdoor, and digital) by all fast-food restaurants;
- The extent of children's and teens' exposure to TV advertising for fast food;
- TV advertising targeted to Black and Hispanic youth, including on Black-targeted and Spanish-language TV and disproportionate exposure by Black versus White youth; and
- Changes in advertising spending and exposure that occurred from 2012 to 2019.

The findings from our analyses of fast-food advertising to children, teens, and Black and Hispanic youth have implications for public health advocacy and other actions to address the negative impact of fast-food consumption on young people's diets and health.

### Summary of results and implications

**Over the eight years examined, fast-food restaurants did not noticeably improve their advertising to children or to Hispanic or Black youth.**

- Most restaurants increased their advertising spending from 2012 and 2019, with even greater increases in Spanish-language TV ad spending.
- Exposure to TV ads declined for all youth age groups, but these declines were lower than expected given substantial reductions in time spent watching TV, especially by children and teens.

## Key findings

- In 2019, fast-food restaurants spent \$5 billion in total advertising, an increase of over \$400 million (9%) vs. 2012.
- Preschoolers, children, and teens viewed on average 2.1 to 2.3 fast-food TV ads per day in 2019. The majority of ads promoted regular menu items and the restaurant in general. Less than 10% of ads viewed promoted kids' meals.
- In 2019, fast-food restaurants spent \$318 million to advertise on Spanish-language TV, a 33% increase from 2012. The number of ads viewed by Hispanic preschoolers and children increased 2% and 7% over the 7 years, in contrast to a decline in ads viewed by preschoolers and children overall.
- In 2019, Black preschoolers, children, and teens viewed approximately 75% more fast-food TV ads than their White peers, an increase compared to 60% more ads viewed by Black youth in 2012.
- Although 274 fast-food restaurants advertised in 2019, six restaurants (McDonald's, Domino's, Burger King, Taco Bell, Sonic, and Little Caesars) were responsible for 46% of total fast-food ad spending and approximately 55% of fast-food TV ads viewed by children and teens.

- Many restaurants continued to advertise directly to children under 12 on children's TV channels, including preschool TV.

### Restaurants pledged to introduce healthier menu items, but the vast majority of fast-food ads viewed by children and teens continued to promote regular high-calorie menu items or the restaurant in general.

- Restaurants also devoted four to six times as much advertising to low-cost value menus/meal bundles and digital offerings (mobile apps and websites) than to healthy menu items.
- Restaurants spent a higher proportion of their Spanish-language and Black-targeted TV advertising on value menus/meal bundles, compared to total ad budgets.
- McDonald's was the only restaurant to allocate more than 1% of its ad spending to promote healthier kids' meals.

### These findings highlight considerable opportunities for improvement in fast-food advertising to youth.

Industry self-regulation of advertising to children, primarily through the Children's Food and Beverage Advertising Initiative (CFBAI), requires that participating companies advertise only healthier products on TV programming directed to children under 12 years. However, our findings demonstrate major limitations in the CFBAI:

- McDonald's Happy Meals that were advertised on children's TV met CFBAI nutrition standards for healthier fast-food kids' meals. However, these ads also promote child visits to the restaurant, where most purchases are for nutritionally poor menu items.<sup>18-20</sup>

- Only McDonald's and Burger King participate in the CFBAI. Non-participating restaurants continued to advertise primarily regular menu items (not kids' meals) directly to children on children's and preschool TV channels.
- Nine out of 10 fast-food ads that children saw appeared on other (not children's) TV programming and promoted other products (not kids' meals).

The amount of time teens spent watching TV and associated TV ads viewed declined dramatically from 2012 to 2019, but extensive fast-food marketing on [social media](#), influencer marketing, product placements, sponsorships, and other newer forms of marketing disproportionately reach and appeal to children and teens.<sup>21-23</sup>

Increased spending on Spanish-language TV fast-food advertising and increases in exposure to fast-food TV ads by Black relative to White youth raise concerns given greater fast-food consumption by Black and Hispanic adolescents.<sup>24</sup> These youth also face greater risks for obesity and other diet-related diseases.<sup>25</sup>

Restaurants' corporate responsibility initiatives to offer more nutritious options and public support for racial justice, diversity, and inclusion,<sup>26</sup> have not included promises to improve unhealthy marketing practices aimed at communities of color.

## Recommendations

Fast-food restaurants must do much more to limit the vast amount of advertising for nutritionally poor products aimed at children and teens and targeted to communities of color. Media companies, policymakers, and advocates also play an integral role in promoting responsible fast-food advertising practices.



### Industry

- Strengthen CFBAI food industry self-regulation of advertising to children.
  - › Participating companies should restrict unhealthy food advertising to children up to 14 years old, at a minimum.<sup>27</sup>
  - › Additional fast-food restaurants should join the CFBAI and discontinue advertising regular menu items on children's and preschool TV channels.
  - › Participating companies should discontinue offering unhealthy versions of products that meet CFBAI nutrition standards (and depicted in child-directed ads) inside restaurants.<sup>28,29</sup>
- Healthier kids' meal beverage default policies should extend to digital ordering apps,<sup>30</sup> and policies should also require healthier sides and main dishes with all kids' meals.
- Fast-food companies should strengthen corporate responsibility initiatives, including
  - › Commit to promoting more nutritious menu items and substantially reducing promotion of nutritionally poor products; and
  - › Discontinue disproportionately high marketing of unhealthy products to Hispanic and Black youth.
- Media companies should follow the lead of Disney<sup>31</sup> and set nutrition standards for food advertising they will accept, including on
  - › All preschool and children's TV networks and third-party websites with large child audiences;
  - › Spanish-language and Black-targeted TV programming, especially programming aimed at youth; and
  - › Product placements of branded fast-food products promoted by child influencers on YouTube Kids.<sup>32</sup>

### Local, state, and federal governments

- Enact policies that require nutrition standards for the entire kids' meal, including main dishes and sides, in addition to healthier beverage default policies.<sup>33</sup> Require monitoring and enforcement of regulations for all policies.

- Limit fast-food promotion and availability for children and teens in neighborhoods, such as zoning restrictions for fast-food restaurants located near youth-oriented settings and signage in store windows.<sup>34</sup>
- Eliminate unhealthy food and beverage marketing to children as a tax-deductible corporate expense.<sup>35</sup>
- The Federal Trade Commission should publish an updated report on food marketing expenditures aimed at children and adolescents (previously published in 2008 and 2012).<sup>36</sup>

### Public health advocates and practitioners

- Encourage policymakers to pursue federal, state, and local government actions that effectively improve the nutrition quality of fast-food consumed by children and teens.<sup>37</sup>
- Develop campaigns to increase public awareness of the vast amounts of primarily unhealthy fast-food advertising, especially advertising that disproportionately targets children, teens, and communities of color.<sup>38</sup>
- Support youth-led countermarketing campaigns to expose marketing practices by the top fast-food advertisers.<sup>39</sup>
- Organize shareholder actions to demand that corporations address problematic marketing practices that contribute to diet-related health inequities.<sup>40</sup>

### Conclusion

Fast-food advertising is a powerful commercial determinant of health.<sup>41</sup> Fast-food restaurant initiatives to introduce healthier options to their menus and limit sugary drinks in kids' meals do not adequately address the negative impact of fast-food advertising on young people's diets and health. Media companies, policymakers, and the public health community can play an important role to demand more responsible fast-food advertising to children, teens, and youth of color.

**Fast-food consumption contributes to poor diet and excess calories among young people. In recent years, fast-food restaurant sales and visits by children and teens have increased. Voluntary and government policies encourage purchases of healthier drinks with kids' meals, and restaurants have added healthier options to their menus. However, it is not clear whether fast-food advertising to children and teens has improved and if it now promotes healthier choices.**

According to one market research firm, quick service (i.e., fast food) restaurant revenue sales “are booming.”<sup>1</sup> U.S. sales totaled \$273 billion in 2019, a 37% increase compared to 2014. Although revenues declined somewhat to \$239 billion in 2020 due to the Covid pandemic, 2020 sales were 20% higher than in 2014. In addition, online delivery services have partnered with fast-food restaurants, and this market is predicted to continue to grow.<sup>2</sup>

Fast-food consumption by children and teens has also increased. In 2017-2018, more than one-third of children and teens consumed fast food on a given day, and fast food contributed on average 11.5% of daily calories for children (2-11 years) and 18% of calories for teens (12-19 years).<sup>3</sup> These percentages increased significantly from 2009-2010 (8.5% for children and 13.1% for teens), which more than offset declines that occurred from 2003-2004 to 2009-2010. In a 2016 study with parents, 91% reported that they had purchased lunch or dinner for their child (2-11 years) in the past week at one of the top-four fast-food restaurants (McDonald's, Burger King, Wendy's, and Subway), and they visited these restaurants on average 2.4 times in the past week.<sup>4</sup> These rates were significantly higher than in 2010, when 79% reported visiting one or more of these restaurants with their child in the past week, and they visited 1.7 times on average.

Excessive consumption of fast food is linked to poor diet and weight outcomes in young people. On days they ate fast food, children consumed 126 additional calories and adolescents consumed 310 additional calories compared to days they did not eat fast food.<sup>5</sup> Fast-food consumption also increased sugar-sweetened beverage calories and sugar and fat intake for both age groups. In a longitudinal study with preschoolers, the number of times fast food was consumed over a year was associated with increased weight status.<sup>6</sup> In studies conducted in New York City, shorter distance from home to a fast-food restaurant was associated with higher weight status among children<sup>7</sup> and students (grades k-12) living in public housing.<sup>8</sup> The largest effects were found among students in grades 3-8 who attended neighborhood schools.

Furthermore, fast-food consumption is higher among Black and Hispanic adolescents,<sup>9</sup> who also face greater risks for obesity and other diet-related diseases.<sup>10</sup> In 2015-2018, fast food contributed 21.5% of calories consumed by non-Hispanic Black teens, 18.5% of calories consumed by Hispanic teens, and 14.8% of calories consumed by non-Hispanic White teens. Of note, research has not found significant racial or ethnic differences in fast-food calories consumed<sup>11</sup> or fast-food visits<sup>12</sup> among children (2-11 years). Access to fast-food restaurants is also higher in predominantly Black neighborhoods,<sup>13</sup> and child-directed marketing appeared more often inside fast-food restaurants in majority Black (compared to White) neighborhoods.<sup>14</sup> Moreover, from 2000 to 2010 the availability of fast-food restaurants near majority Black, Hispanic, and Asian schools increased in less affluent neighborhoods, but not in similar White and/or more affluent neighborhoods.<sup>15</sup>

## Industry and government responses to public health concerns

Fast-food restaurants have responded to public health concerns about excessive fast-food consumption primarily by introducing healthier menu items, including in kids' meals, and removing soda from kids' meal menus. Some restaurants have also made corporate responsibility statements and participate in industry voluntary programs and policies to address advertising directly to children.

### Corporate responsibility statements

We identified 13 restaurant companies (including 17 individual chains) that made public corporate responsibility statements as of March 2021 (see **Appendix Table 1**). Three restaurants (McDonald's, Subway, and Burger King) promised to provide balanced kids' meal menus, and four (McDonald's, Yum! Brands, Domino's, and Burger King) pledged to market responsibly to children. The remaining statements focused primarily on introducing lower-calorie options to regular menus, offering quality ingredients (e.g., wholesome, authentic, no preservatives or artificial colors), nutrition transparency (e.g., providing calorie and ingredient information), and ingredient sourcing and sustainability. We did not identify any statements regarding marketing or providing nutritious options to teens, Hispanic or Black consumers, or other groups at risk for poor diet and diet-related diseases. Moreover, restaurants that have publicly supported the Black Lives Matter movement and/or racial justice, equity, and inclusion<sup>16</sup> did not promise to change their business practices to address health disparities affecting communities of color.

Consistent with restaurants' pledges to introduce lower-calorie menu items, recent studies have found that calories of newly introduced menu items at large chain restaurants, especially main dishes, declined from 2012 to 2018.<sup>17</sup> In addition, items removed from chain restaurant menus in 2012 to 2015 had more calories than items that remained on the menu.<sup>18</sup> Analyses of children's menu items at chain restaurants from 2010 to 2014 found an improvement in nutrient content of side dishes, including more fruits and vegetables, but no change in main dishes.<sup>19</sup>

However, new main dish items introduced in 2012 to 2014 at major restaurant chains had more calories than main dish

items that remained on the menus all three years,<sup>20</sup> and mean calories of items on the menu from 2012 to 2018 did not change significantly.<sup>21</sup> Another study of top burger restaurant chains found no change in the overall nutrition profile of menu items from 2012 to 2016.<sup>22</sup> Moreover, the overall nutrient content of kids' meals did not change from 2012 to 2015,<sup>23</sup> and children's main dishes did not change from 2010 to 2014.<sup>24</sup> One-third of children's main dishes at fast-food restaurants exceeded recommended levels of sodium, fat, and saturated fat in 2014.<sup>25</sup> The Rudd Center's 2013 analysis of kids' meals at the largest fast-food restaurants found that more than 60% of possible kids' meal combinations (main dish, side, and

**Table 1.** Industry voluntary and government policies regarding fast-food restaurant meals and advertising

<b>INDUSTRY VOLUNTARY POLICIES</b>			
<b>Organization/Company</b>	<b>Policy type</b>	<b>Description</b>	<b>Implementation date</b>
American Beverage Association <sup>30</sup>	Kids' meal default beverages	The ABA works with restaurants interested in a voluntary program to make water, milk, or 100% fruit or vegetable juice the default beverage in kids' meals.	2018
National Restaurant Association Kids LiveWell (KLW) <sup>31</sup>	Nutrition criteria for kids' meals	Participating restaurants must provide at least two kids' meals that meet KLW nutrition criteria.	2011 (revised criteria released in 2019)
Children's Food and Beverage Advertising Initiative (CFBAI) <sup>32</sup>	Food industry voluntary program to "improve the landscape of food advertising to children under 12"	19 participants, including two fast-food restaurants (McDonald's and Burger King), pledge to advertise only healthier dietary choices in child-directed advertising.	2007
<b>GOVERNMENT POLICIES</b>			
<b>Jurisdiction</b>	<b>Policy type</b>	<b>Description</b>	<b>Implementation date</b>
Municipality <sup>33</sup>	Healthier kids' meals	Prince George's County, MD Healthy Kids' Meals Bill ensures that healthier beverages and sides are the default with kids' meals and that at least one kids' meal combination meets expert nutrition standards.	May 24, 2021*
State <sup>34</sup>	Kids' meal default beverages	Kids' meal menus must only list healthier beverages (e.g., water, sparkling water, plain milk, flavored milk, and/or 100% fruit juice). Policies differ in specific beverages allowed, but all policies permit soda if requested by consumer.	CA: Jan 1, 2019 HI: Jan 1, 2020 DE: July 17, 2020
Municipality <sup>35</sup>	Kids' meal default beverages	Kids' meal menus must only list healthier beverages (e.g., water, sparkling water, plain milk, flavored milk and/or 100% fruit juice). Policies differ in specific beverages allowed, but all policies permit soda if requested by consumer.	2016: Stockton, CA 2017: Davis, Perris, Berkeley, Santa Clara County, Cathedral City, Long Beach, CA; Lafayette, CO 2018: Daly City, CA; Baltimore, MD; Louisville, KY 2019: Wilmington, DE 2020: Philadelphia, PA; New York, NY 2021: Cleveland, OH
Municipality <sup>36</sup>	Kids' meals with toys	Policies set nutrition standards for single food items and meals sold with a toy or other incentive item.	2010: Santa Clara County, CA 2011: San Francisco, CA
Federal (USDA) <sup>37</sup>	Menu labeling	Chain restaurants must disclose the number of calories contained in standard items on menus and menu boards.	May 7, 2018

\*Individual requirements to be phased in over a 4-year period.

drink) exceeded recommended calories for an elementary-school-age child and 80% exceeded recommended calories for a preschooler.<sup>26</sup> In 2019, 83% of chain restaurants with kids' meals continued to offer soda as a kids' meal drink.<sup>27</sup>

### Industry voluntary policies

Industry organizations and some restaurants have also introduced voluntary policies to improve the nutrition of kids' meals (see **Table 1**). In 2011, the National Restaurant Association launched the Kids LiveWell program, through which participating restaurants commit to offer at least two meals and two side dishes for children that meet specific nutrition criteria.<sup>28</sup> They also commit to follow a "default-beverage" policy to automatically include or offer water, milk, or juice with kids' meals (although customers may request other drinks, including soda). In 2018, the American Beverage Association pledged to work with their restaurant partners to voluntarily adopt healthy beverages as the default in kids' meals.<sup>29</sup>

Since 2013, some of the largest fast-food restaurants (including McDonald's, Burger King, and Wendy's) have also pledged to remove fountain drinks for kids' meal menu boards, although they are still available with kids' meals upon request.<sup>38</sup> McDonald's also began to offer a healthier side (e.g., apple slices) automatically with its kids' meals, in addition to a small portion of french fries.

The Children's Food and Beverage Advertising Initiative (CFBAI) represents the primary industry program to limit unhealthy food advertising to children. The CFBAI requires participating companies to pledge that they will only advertise products that meet minimum nutrition standards directly to children under age 12, and a few companies have pledged to not advertise any products directly to children.<sup>39</sup> McDonald's and Burger King are the only restaurants in this voluntary program, and they both promise to only show kids' meals that meet CFBAI nutrition standards in child-directed advertising.

McDonald's and Subway have also partnered with Alliance for a Healthier Generation to establish and evaluate policies to market responsibly to children. Consistent with its CFBAI pledge, McDonald's policy requires Happy Meal Bundles shown in children's ads to meet nutrition criteria,<sup>40</sup> while Subway's policy sets nutrition criteria for Subway Fresh Fit for Kids meals shown in advertising on children's programming, as well as in marketing in stores and online.<sup>41</sup> The Alliance has published evaluations of McDonald's policy,<sup>42</sup> but the Subway partnership appears to have expired in 2017.

### Government policies

Some municipalities and states have also enacted legislation to improve kids' meal nutrition. The earliest kids' meal policies, enacted in 2010 and 2011 in Santa Clara County and San Francisco CA, required kids' meals that came with toys to meet minimum nutrition standards.<sup>43</sup> Since 2015 (as of March 2021), 15 municipalities and three states (California, Hawaii, and Delaware) have enacted policies that require healthier beverages to be offered by default in kids' meals. As with voluntary policies, government policies continue to allow other beverages (including soda) to be provided with kids' meals upon request. In 2020, Prince George's County, MD passed a bill that requires healthier drinks and sides to be offered as the default with kids' meals and requires at least one kids' meal combination to meet minimum nutrition standards. In addition to kids' meal policies, as of 2018, the U.S. Department of Agriculture (USDA) mandates that fast-food restaurant chains must disclose calories on menu boards,<sup>44</sup> which applies to all types of menu items.

Although comprehensive evaluations of voluntary and government healthier kids' meal policies have yet to be published, a few studies demonstrate potential limitations to their effectiveness. Five years following its pledge to remove soda from kids' meal menu boards, McDonald's announced that slightly more than half of beverages in Happy Meals were water, milk, or juice (with the remainder presumably soda).<sup>45,46</sup> An analysis of healthier kids' meal pledges at major fast-food restaurants showed they were associated with increased selection of healthier sides with kids' meals, but not healthier drinks or purchases of kids' meals.<sup>47</sup> Implementation appears to be a major limitation of both voluntary<sup>48,49</sup> and government<sup>50,51</sup> healthier kids' meal policies, as restaurant personnel continue to offer soda automatically in a high proportion of kids' meal orders. Another study that examined kids' meal nutrition from 2012 to 2015 found that restaurants who participated in Kids LiveWell reduced the calories in main dishes but increased calories in sides relative to restaurants who did not participate, with no change in overall kids' meal nutrient content.<sup>52</sup>

Another limitation of healthier kids' meal policies is that kids' meals represent only a portion of fast food consumed by children and teens. In a 2016 study, two-thirds (66%) of parents who visited a fast-food restaurant with their young child (ages 2-5) for lunch or dinner and less than one-half (46%) who visited with an older child (ages 6-11) reported purchasing a kids' meal for their child. Moreover, 29% of those who purchased a kids' meal also purchased another item (such as a dessert) for their child, and this percentage increased significantly compared to 2010. In a study that included children and some teens (15% of the sample), 31% of caregivers purchased a kids' meal for their child during a restaurant visit.<sup>53</sup>



## Measuring progress in fast-food advertising

Many factors likely contribute to frequent fast-food consumption by children and teens, including convenience, low cost, kids' meals and toys, and easy access to fast-food restaurants.<sup>54-56</sup> Extensive advertising of fast food is another. In one study, increased exposure to fast-food advertising specifically was associated with an increase in fast-food consumption among elementary school-age children.<sup>57</sup> In another longitudinal study, preschoolers with moderate or high exposure to child-targeted fast-food ads on TV were approximately 30% more likely to consume fast food during the past week.<sup>58</sup>

Extensive exposure to unhealthy food marketing increases young people's preferences, purchase requests, attitudes, and consumption of the primarily nutrient-poor energy-dense products promoted,<sup>59-61</sup> and numerous studies have demonstrated that fast food is the most frequent food category advertised to children and teens. Fast food represented 40% of all food marketing expenditures directed at youth consumers (2-17 years),<sup>62</sup> as well as 26% of all TV food ads viewed by children and 31% of ads viewed by teens in 2017.<sup>63</sup> Fast food and other restaurants represented 52% of all food and beverage advertising spending in 2017.<sup>64</sup> Previous Rudd Center reports have documented the billions of dollars U.S. companies spend to advertise fast food, primarily promoting nutritionally poor products (see **Table 2**).<sup>65-67</sup>

**Table 2.** Fast-food advertising FACTS: 2012 and 2016-2017

<p><b>Fast-food advertising in 2012<sup>68</sup></b></p> <ul style="list-style-type: none"> <li>Fast-food restaurants spent \$4.6 billion in total advertising, an increase of 8% versus 2009.</li> <li>Preschoolers (2-5 years), children (6-11 years), and teens (12-17 years) viewed on average 2.8, 3.2, and 4.8 fast-food ads on TV daily.</li> <li>Six companies – McDonald's, Subway, Burger King, Domino's, Yum! Brands (Taco Bell, Pizza Hut, KFC), and Wendy's – were responsible for more than 70% of fast-food TV ads viewed by young people.</li> <li>McDonald's, Burger King, and Subway advertised their kids' meals, but kids' meals represented just 24-25% of fast-food TV ads viewed by preschoolers and children.</li> <li>Fast-food advertising on Spanish-language TV totaled \$239 million, an increase of 8% from 2009.</li> <li>Hispanic preschoolers viewed over 40% more fast-food ads on Spanish-language TV than did Hispanic children or teens, but just 5% of these ads promoted kids' meals.</li> <li>Black youth viewed approximately 60% more fast-food TV ads than did White children and teens, averaging 3.9 ads-per-day for Black children (2-11 years) and 6.3 ads-per-day for Black teens (12-17 years).</li> </ul>
<p><b>Fast-food advertising on children's TV in 2016<sup>69</sup></b></p> <ul style="list-style-type: none"> <li>Two fast-food restaurants belonged to the Children's Food &amp; Beverage Advertising Initiative (CFBAI) – McDonald's and Burger King – and pledged to advertise only healthier dietary choices on child-directed TV.</li> <li>McDonald's placed more advertising on children's TV than any other food-related brand, with preschoolers and children seeing 132 and 152 Happy Meal ads, respectively, on children's TV. It spent \$32 million to advertise Happy Meals (4% of total ad spending), but Happy Meals represented approximately 75% of McDonald's TV ads viewed by preschoolers and children.</li> <li>Burger King did not advertise its kids' meals on children's TV, but the restaurant ranked first in total food-related TV ads viewed by preschoolers and children on other TV programming. It was responsible for 94 and 101 ads viewed, respectively, which promoted regular menu items on non-children's TV programming.</li> <li>Subway also spent \$7 million to advertise its kids' meals (2% of total ad spending) and primarily advertised its kids' meals on children's TV. Kids' meals represented 12 and 16 ads viewed, respectively, by preschoolers and children, approximately 20% of total Subway TV ads viewed.</li> <li>Wendy's, Sonic, Papa John's, Pizza Hut, and Domino's Pizza advertised other menu items (not kids' meals) directly to children on children's TV.</li> </ul>
<p><b>Fast-food advertising targeted to Hispanic and Black youth in 2017<sup>70</sup></b></p> <ul style="list-style-type: none"> <li>Top Black-targeted brands (with &gt;\$1 million in ads on Black-targeted TV) included Taco Bell, Domino's, Burger King, Wendy's, Arby's, McDonald's, Pizza Hut, Little Caesars, Subway, Sonic, and KFC. Black teens saw 1.9 to 2.5 times as many ads for these same restaurants compared to White teens.</li> <li>Taco Bell and Domino's spent the most to advertise on Black-targeted TV (&gt;\$12 million), Arby's spent the highest proportion of its total ad budget on Black-targeted TV (5%), and McDonald's had the highest Black teen targeted ratio (2.5).</li> <li>Top Hispanic-targeted brands (with &gt;\$5 million in ads on Spanish-language TV) included McDonald's, Subway, Wendy's, Taco Bell, Domino's, Popeyes, Burger King, and Little Caesars.</li> <li>McDonald's and Subway spent the most to advertise on Spanish-language TV (\$58 and \$47 million, respectively). Subway, Wendy's, and Popeyes allocated 13% or more of their TV ad budgets to Spanish-language TV.</li> </ul>

In May 2010, the World Health Assembly unanimously adopted a set of recommendations to reduce the marketing of unhealthy food and beverages to children up to age 17 and urged their adoption by governments.<sup>71</sup> Improving unhealthy food advertising aimed at children, teens, and Black and Hispanic youth, including fast-food advertising, represents an urgent public health priority to address the crisis of poor diet and health-related diseases affecting young people.

### The current report

In this report, we update previous Fast Food FACTS reports<sup>72,73</sup> and document 2019 advertising spending and TV advertising exposure for fast-food restaurants. We answer the following questions about fast-food advertising to youth:

- How much did fast-food restaurants spend on advertising in 2019? How has fast-food advertising changed since 2012?
- How many TV ads did young people see and what products were advertised to them?
- How much of children's exposure occurred on children's TV channels?
- How much fast-food advertising appeared on Spanish-language TV, and how many ads did Hispanic youth see?

- How much fast-food advertising was targeted to Black youth, including advertising on Black-targeted TV channels and disproportionate advertising to Black versus White youth?
- Which fast-food restaurants were responsible for the most advertising in 2019? How did advertising practices differ between restaurants?

We did not have access to food industry proprietary documents, including privately commissioned market research, media and marketing plans, or other strategic documents. Therefore, we do not attempt to interpret fast-food companies' goals or objectives for their marketing practices. Rather, we provide transparent documentation of advertising that promotes fast food to children and teens and changes in advertising expenditures and exposure over time.

In recent years, fast-food restaurants have introduced healthier menu items, and many have removed soda from kids' meal menu boards. Some have also pledged to advertise only healthier kids' meals directly to children. However, research has not examined whether they have begun to promote healthier menu options in their advertising or reduced the billions of dollars they spend to target high-calorie nutritionally poor products to children, teens, and communities of color. Independent research is necessary to continue to monitor fast-food restaurant advertising to children and teens.

## TOP FAST-FOOD RESTAURANTS

## Top fast-food restaurants

## Definition

Fast-food restaurant	Fast-food restaurants are food retailing institutions with a limited menu that offer pre-cooked or quickly prepared food available for take-out. <sup>1</sup> Many provide seating for customers, but no wait staff. Customers typically pay before eating and choose and clear their own tables. They are also known as quick-service restaurants (QSRs).
Top fast-food advertisers	Fast-food restaurants that ranked in the top-25 in total advertising spending in 2019 and/or targeted their advertising to children, Hispanic, and/or Black consumers (N=27).
Fast-food company	Corporation or other entity that owns the restaurant. Some fast-food companies own more than one different fast-food restaurant chain.

In this report, we focus on the 25 U.S. fast-food restaurants with the highest advertising spending in 2019, plus two restaurants with TV advertising targeted to children, Hispanic, and/or Black consumers. U.S. sales of these 27 restaurants totaled \$188 billion in 2019, an average increase of 24% over 2012 sales<sup>1</sup> (see **Table 3**).

**Table 3.** Sales ranking of top fast-food advertisers: 2019

Sales ranking							
2019	2012	Company	Restaurant	Category	2019 U.S. sales (\$ mill)	% change vs. 2012	Top-25 ad spending in 2012
1	1	McDonald's Corp	McDonald's	Burger	\$40,413	14%	✓
2	3	Starbucks Corp	Starbucks	Snack	\$21,550	78%	✓
3	9	Chick-fil-A	Chick-fil-A	Chicken	\$11,000	138%	✓
4	6	Yum! Brands	Taco Bell	Global	\$11,000	47%	✓
5	5	Restaurant Brands Intl	Burger King	Burger	\$10,300	20%	✓
6	2	Doctor's Associates	Subway	Sandwich	\$10,000	-17%	✓
7	4	Wendy's	Wendy's	Burger	\$9,865	15%	✓
8	7	Dunkin' Brands	Dunkin'	Snack	\$9,220	47%	✓
9	13	Domino's Pizza	Domino's	Pizza	\$7,100	103%	✓
10	11	JAB Holding Company	Panera Bread	Sandwich	\$5,925	53%	✓
11	16	Chipotle Mexican Grill	Chipotle	Global	\$5,520	102%	✓
12	8	Yum! Brands	Pizza Hut	Pizza	\$5,380	-5%	✓
13	10	Yum! Brands	KFC	Chicken	\$4,820	8%	✓
14	12	Roark Capital Group	Sonic	Burger	\$4,687	24%	✓
15	15	Roark Capital Group	Arby's	Sandwich	\$3,885	30%	✓
16	22	Little Caesars Enterprise	Little Caesars	Pizza	\$3,850	29%	✓
18	18	Berkshire Hathaway	Dairy Queen	Snack	\$3,760	63%	✓
19	19	Restaurant Brands Intl	Popeyes	Chicken	\$3,750	66%	✓
20	14	Jack In The Box	Jack In The Box	Burger	\$3,505	14%	✓
21	17	Papa John's Intl	Papa John's	Pizza	\$2,655	11%	✓
23	25	Roark Capital Group	Jimmy John's	Sandwich	\$2,105	67%	
24	20	Roark Capital Group	Hardee's	Burger	\$2,070	9%	✓
25	*	Zaxby's Franchising	Zaxby's	Chicken	\$1,840		
26	31	Culver Franchising System	Culver's	Burger	\$1,730	106%	
30	24	Roark Capital Group	Carl's Jr.	Burger	\$1,390	-1%	✓
37	35	Oak Hill Capital Partners	Checkers/Rally's	Burger	\$862	24%	
*	46	Cici Enterprises	Cicis Pizza	Pizza			

\*Not on QSR top-50 list

Source: The QSR 50; 2013;<sup>2</sup> 2020<sup>3</sup>

<sup>1</sup> Average increase for restaurants on the QSR top-50 list in 2012 and 2019

**Table 4.** Restaurant groups with multiple fast-food chains

Company*	Restaurants	
	Top fast-food advertisers	Other fast-food chains
Yum! Brands	Taco Bell; KFC; Pizza Hut	Habit Burger Grill
Restaurant Brands Intl	Burger King; Popeyes	Tim Hortons
Roark Capital Group	Sonic; Arby's; Carl's Jr.; Hardee's; Jimmy John's	Moe's Southwest Grill; Schlotzky's; Jamba Juice; Auntie Anne's; Rusty Taco

\*Includes all restaurant group companies that own top fast-food advertisers

The top fast-food advertisers all ranked among the 50 restaurants with the highest U.S. sales in 2019, with one exception (Cicis Pizza). However, some restaurants that ranked in the top-30 in sales had little to no advertising spending and are not included in this report: Panda Express (#17), WhatABurger (#23), Five Guys (#27), Raising Cane's (#28), and Wingstop (#29).

From 2012 to 2019, sales increased at all top fast-food advertisers, with the exception of Subway, Pizza Hut, and Carl's Jr. Sales at four restaurants more than doubled during this time: Chick-fil-A, Domino's Pizza, Chipotle, and Culver's. Of note, Chick-fil-A rose from ninth in sales in 2012 to third in 2019, and Domino's Pizza rose from 13th to ninth.

Fast-food companies included companies that owned individual fast-food chains (e.g., McDonald's Corp, Starbucks Corp), as well as restaurant groups that owned multiple chains (see **Table 4**).

### Key findings: Top fast-food advertisers

- Sales for the 27 top fast-food advertisers totaled \$188 billion in 2019, an average increase of 24% compared to 2012.
- From 2012 to 2019, sales increased for all but three of these restaurants (Subway, Pizza Hut, and Carl's Jr.). Sales more than doubled for four restaurants (Chick-fil-A, Domino's, Chipotle, and Culver's).



## TRADITIONAL MEDIA ADVERTISING

In this section, we examine traditional advertising by fast-food restaurants in 2019 and changes versus 2012 when available. We first present advertising spending in all measured media, including TV, radio, outdoor, and digital, in total and by restaurant. We then provide preschooler, child, and teen exposure to TV advertising in total and by restaurant. Finally, we present data on the products, special menus, and individual menu items with the most total advertising in 2019, including TV advertising targeted to children and teens. Most analyses focus on the 27 top fast-food advertisers.

### Advertising spending

Advertising spending	Definition
Advertising spending	Amount spent on all measured media, including TV, magazines, digital, radio, newspapers, FSI coupons, and outdoor.

Fast-food advertising spending totaled more than \$5.0 billion in 2019, an increase of 9% over the \$4.6 billion spent in 2012. TV represented 91% of total advertising spending, including national TV (broadcast, cable, and syndicated) (68%) and spot TV (i.e., local) (23%) (see **Figure 1**). Outdoor, radio, and digital ads each represented less than 5% of total ad spending in 2019. From 2012 to 2019, fast-food TV ad spending increased by 12% (vs. \$4.1 billion 2012). Radio and outdoor advertising spending declined (32% and 7%, respectively), while digital advertising increased by 74%.

### Ad spending by company

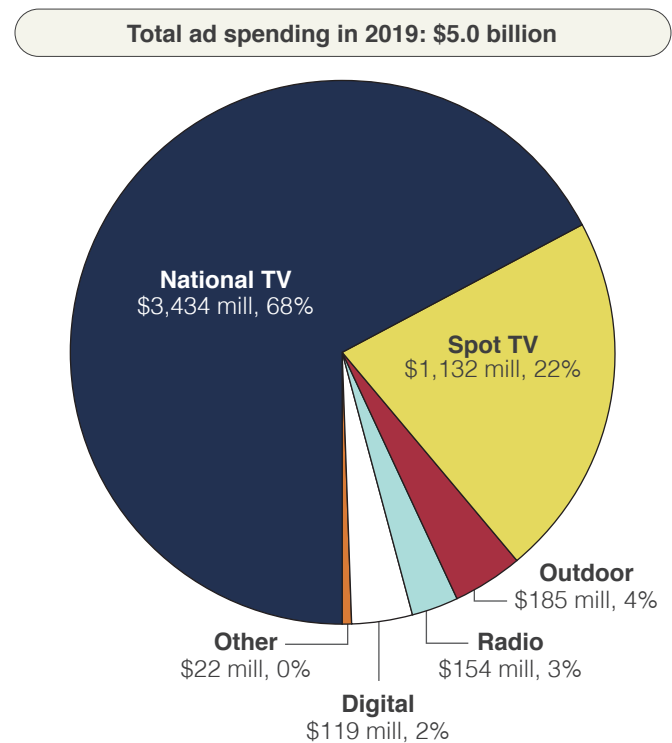
In 2019, 274 different fast-food restaurants advertised in any type of media, but six companies were responsible for 65% of all fast-food ad spending, totaling \$3.3 billion (see **Figure 2**). McDonald's Corp and Yum! Brands (Taco Bell, Pizza Hut, and KFC) each represented 15% of total fast-food advertising spending, and Roark Capital Group (Sonic, Arby's, Hardee's, Carl's Jr.) represented another 11%. Restaurant Brands Intl (Burger King, Popeyes) and Domino's Pizza contributed approximately 9% of ad spending, and Doctor's Associates (Subway) was responsible for 5%.

Total combined ad spending by these six companies did not change from 2012 to 2019. However, two companies reduced their spending during this time: McDonald's Corp (-20%) and Doctor's Associates (-58%). Yum! Brands advertising remained relatively unchanged (-1%). In contrast, ad spending by the other three companies increased by 28% or more; Domino's Pizza advertising more than doubled.

### Ad spending by restaurant

**Ranking Table 1** presents total advertising spending for the top fast-food advertisers. These 27 restaurants represented 92% of all fast-food ad spending.

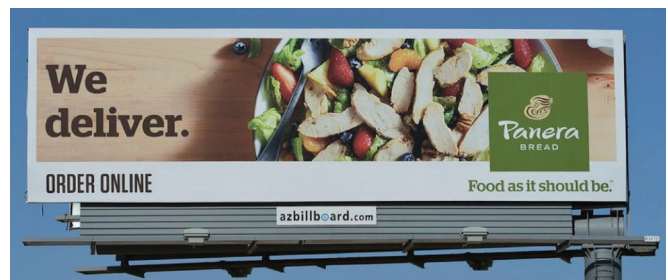
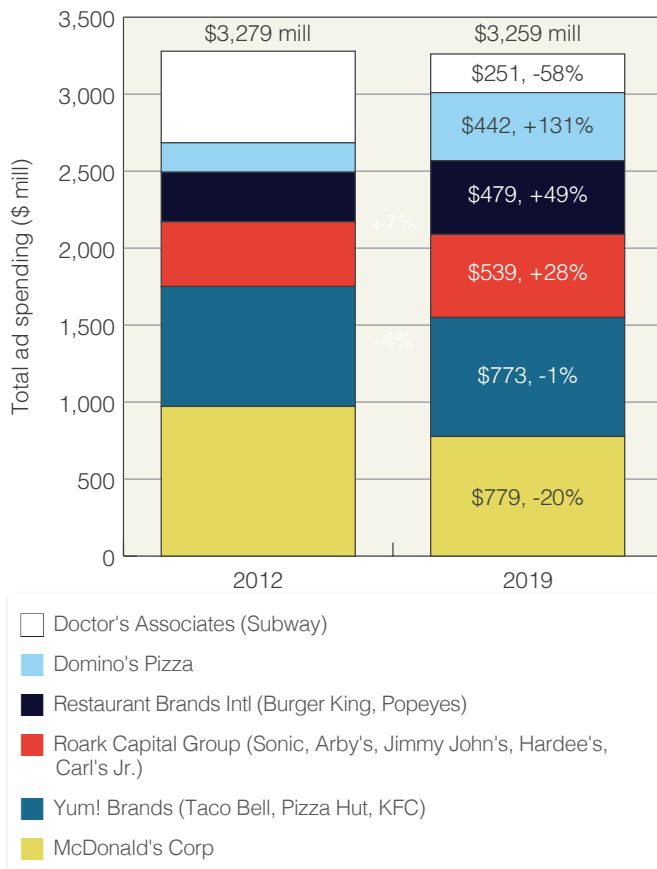
**Figure 1.** Total fast-food ad spending by media type: 2019



Source: Analysis of 2019 Nielsen data (Nielsen Global Media)

As in 2012, McDonald's spent far more than any other restaurant in 2019 (\$777 million), while Domino's (\$442 million) surpassed Subway as second in ad spending. Taco Bell and Burger King each spent over \$300 million, and four restaurants (Subway, Wendy's, Sonic, and KFC) spent more than \$200 million. These eight restaurants were responsible for 52% of all advertising spending in 2019.

**Figure 2.** Changes in ad spending by the top-six fast-food companies: 2012 vs. 2019



Dunkin', Chick-fil-A, and Panera spent a disproportionately high amount on outdoor advertising.

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

*Changes in ad spending.* Only seven restaurants reduced their advertising from 2012 to 2019, including Subway and McDonald's as noted previously (see **Table 5**). The 20 remaining restaurants increased their advertising spending. Domino's and three additional restaurants increased their advertising by two times or more (Chick-fil-A, Little Caesars, and Chipotle). Two restaurants that did not advertise in 2012 ranked among the top advertisers in 2019 (Zaxby's and Jimmy John's).

*Ad spending by media.* All top fast-food advertisers devoted 80% or more of their total ad spending to TV. TV advertising represented 98% or more of advertising spending for Burger King, Domino's, Sonic, and Popeyes.

A few restaurants spent a greater proportion of advertising on other types of media (not TV). Consistent with its high advertising budget, McDonald's spent the most on outdoor (\$70.7 mill), radio (\$33.0 mill), and digital (\$39.3

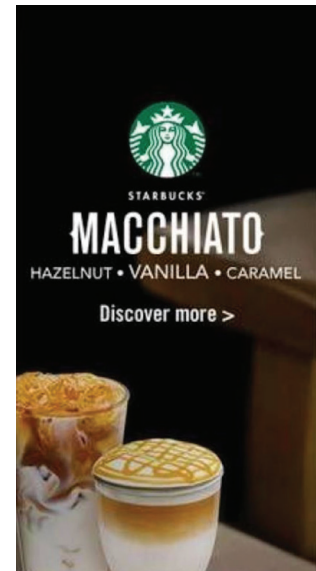
**Table 5.** Restaurants with the greatest changes in ad spending: 2012 vs. 2019

Restaurant	Spending decline	Restaurant	Spending increase
Subway	-\$344.8 mill (-58%)	Domino's	\$250.6 mill (+131%)
McDonald's	-\$194.9 mill (-20%)	Burger King	\$112.4 mill (+48%)
KFC	-\$57.6 mill (-22%)	Taco Bell	\$102.8 mill (+37%)
Pizza Hut	-\$51.2 mill (-21%)	Chick-fil-A	\$89.5 mill (+299%)
Wendy's	-\$27.5 mill (-10%)	Little Caesars	\$86.3 mill (+98%)
Jack In The Box	-\$23.4 mill (-23%)	Chipotle	\$67.5 mill (+3613%)

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

mill) advertising. Subway also ranked among the top-five advertisers in outdoor (\$9.4 mill), radio (\$19.1 mill), and digital (\$11.5 mill). Additional advertisers with notable spending on outdoor ads included Dunkin' (\$14.1 mill), Chick-fil-A (\$8.8 mill), and Panera Bread (\$8.1 mill).

Taco Bell (\$19.0 mill) and Wendy's (\$16.2 mill) also ranked in the top-five for radio advertising, while Wendy's (\$7.3 mill), KFC (\$6.4 mill), and Pizza Hut and Starbucks (\$6.3 mill each) had high digital advertising.



KFC, Wendy's, and Starbucks ranked in the top-five restaurants in digital advertising spending.

## TV advertising exposure

### TV advertising exposure

Definition	Definition
Gross ratings points (GRPs)	Measure of the per capita number of TV advertisements viewed by a specific demographic group over a period of time across all types of programming. GRPs for specific demographic groups are also known as targeted rating points (TRPs).
Average number of ads viewed (exposure)	GRPs divided by 100. Provides a measure of the number ads viewed by individuals in a specific demographic group, on average, during the time period measured.
Targeted ratios (vs. adults)	A measure of relative exposure by youth versus adults, calculated by dividing GRPs for preschoolers (2-5 years), children (6-11 years), or teens (12-17 years) by GRPs for adults (18-49 years).
TV viewing times	The average amount of time that youth in each age group spent watching television in a day.

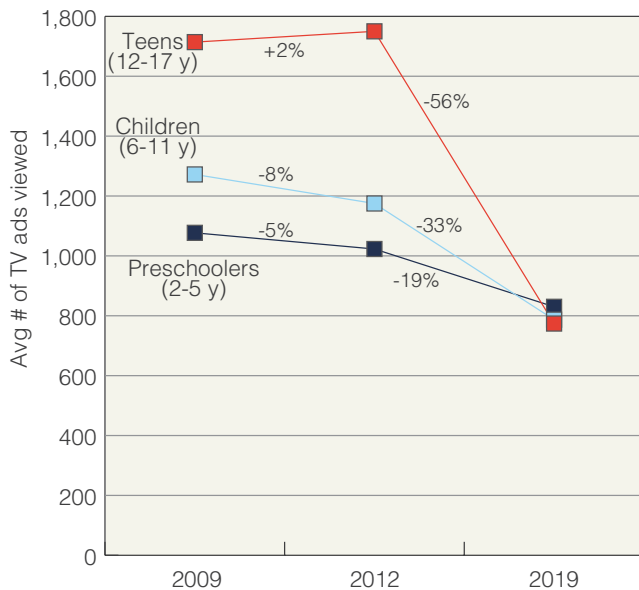
In 2019, preschoolers (2-5 years) viewed on average 830.0 fast-food TV ads (2.3 ads-per-day), children (6-11 years) viewed 786.5 ads (2.2 ads-per-day), and teens (12-17 years) viewed 774.5 ads (2.1 ads-per-day). On average, all youth age groups viewed 42% to 45% the number of TV ads viewed by adults (18-49 years), who viewed 1,864.9 ads on average (5.1 ads-per-day).

From 2012 to 2019, the number of fast-food TV ads viewed declined by 19% for preschoolers, 33% for children, and 56% for teens (see **Figure 3**). These declines should be evaluated in the context of trends in TV viewing time (see **Figure 4**). From 2013 to 2019, the amount of time children in all age groups spent watching TV decreased at higher rates.<sup>ii</sup> Preschoolers and children spent 44% and 51% less time watching TV in

<sup>ii</sup> Data for 2012 TV viewing times were not available, so changes from 2013 are reported.



**Figure 3.** Trends in youth exposure to TV ads: 2010-2019



Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

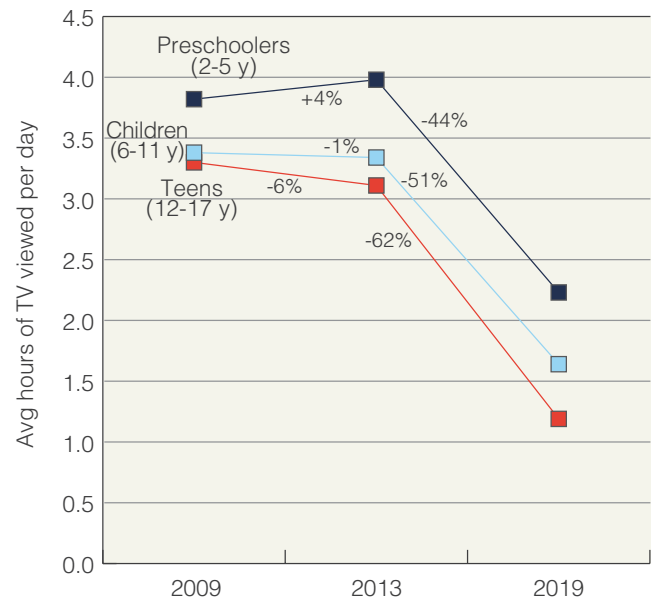
2019 compared to 2013, and teens spent 62% less time watching TV. Therefore, the decline in number of ads viewed by preschoolers, children, and teens was lower than expected given significant declines in TV viewing times.

### TV advertising exposure by company

In 2019, the six companies with the most fast-food advertising spending also led in fast-food TV ads viewed by youth. McDonald's Corp contributed the most ads viewed by children (128.9 ads), whereas Yum! Brands (Taco Bell, Pizza Hut, and KFC) contributed the most ads viewed by preschoolers and teens (136.9 and 137.9 ads, respectively) (see **Figure 5**). Young people also viewed a high number of TV ads for Restaurant Brands Intl (Burger King, Popeyes), Roark Capital Group (Sonic, Arby's, Hardee's, Carl's Jr), Domino's Pizza, and Doctor's Associates (Subway). These six companies were responsible for 71% to 72% of total TV ads viewed by all youth.

Despite overall declines in TV viewing times and total fast-food ad exposure from 2012 to 2019, a number of companies increased their advertising to preschoolers and/or children. Roark Capital Group ads increased by 51% for preschoolers and 18% for children, while Domino's Pizza ads increased by 37% and 9%, respectively. Preschoolers also viewed 9% more ads for Restaurant Brands Intl.

**Figure 4.** Trends in youth TV viewing times: 2010-2019



Source: Analysis of 2010, 2013, and 2019 Nielsen data

Consistent with large declines in ad spending, McDonald's Corp and Doctor's Associates (Subway) ads viewed by preschoolers and children declined from 2012 to 2019. Exposure to Yum! Brands ads also declined by 16% for preschoolers and 31% for children. Teens' exposure to ads for all six companies also declined during this period.

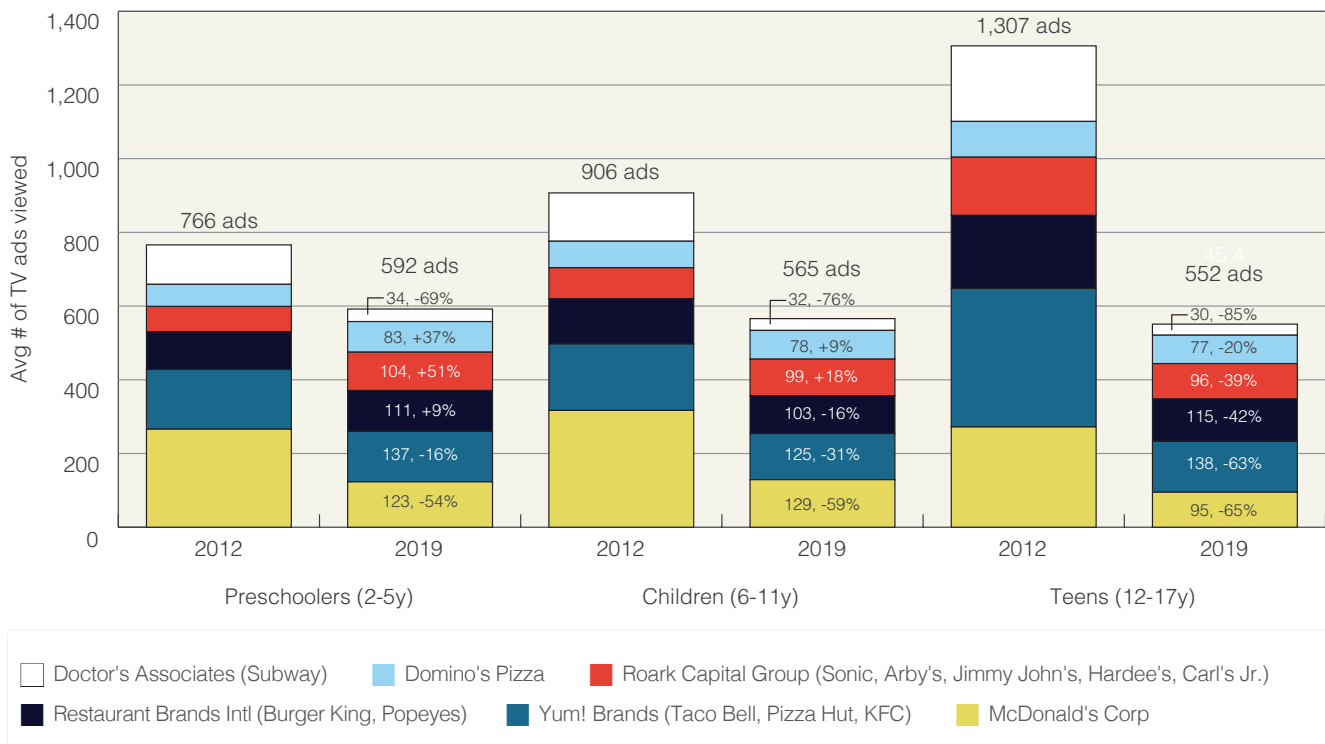
### TV advertising exposure by restaurant

**Ranking Tables 2 and 3** display the average number of fast-food TV ads viewed by preschoolers, children, and teens by restaurant in 2012 and 2019. The 27 top fast-food advertisers accounted for 96% to 97% of fast-food TV ads viewed by all youth.

At the restaurant level, McDonald's was the top advertiser to all youth age groups, accounting for 15% to 16% of ads viewed by preschoolers and children, and 12% of ads viewed by teens. Consistent with advertising spending rankings, Domino's, Burger King, and Taco Bell also ranked in the top-four advertisers to preschoolers, children, and teens. Sonic ranked number-five in ads viewed by preschoolers, children, and teens, compared to its number-seven ranking in ad spending (both Subway and Wendy's had higher total spending). These top-five restaurants accounted for 49% to 50% of ads viewed by all youth.



**Figure 5.** Changes in TV ad exposure for top-six companies: 2012 vs. 2019



Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

*Changes in ads viewed.* Despite an overall decline in fast-food TV ad exposure, ads viewed by preschoolers increased for 12 of the 27 top fast-food advertisers (see **Table 6**). Compared to 2012, preschoolers saw 9 to 24 additional ads for Sonic, Domino's, Taco Bell, Popeyes, and Dairy Queen in 2019. Ads viewed by children also increased for 11 of these restaurants.

For all restaurants except Chick-fil-A, percent increases were consistently higher for preschoolers than for children.

The number of ads viewed by teens increased for three of the top fast-food advertisers. Panera Bread had the greatest increase in ads viewed by teens, followed by Chick-fil-A. Three additional restaurants advertised to youth on TV in 2019.

**Table 6.** Restaurants with the greatest increases in ads viewed by age group: 2012 vs. 2019

Restaurant	Preschoolers (2-5 y)		Children (6-11 y)		Teens (12-17 y)	
	Change in avg # of ads viewed	% change	Change in avg # of ads viewed	% change	Change in avg # of ads viewed	% change
Sonic	+24.4	77%	+14.4	37%	*	
Domino's	+22.2	37%	+6.7	9%	*	
Taco Bell	+15.7	30%	+0.2	<1%	*	
Popeyes	+11.7	55%	+3.7	14%	*	
Dairy Queen	+9.0	38%	+0.5	2%	*	
Panera Bread	+7.8	356%	+6.9	296%	+5.6	164%
Little Caesars	+7.5	22%	+5.0	15%	*	
Dunkin'	+6.4	48%	+5.3	37%	*	
Chick-fil-A	+4.6	126%	+4.1	128%	+3.1	97%

\*Ads viewed decreased for this age group

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

**Table 7.** Restaurants with the greatest decreases in ads viewed by age group: 2012 vs. 2019

Restaurant	Preschoolers (2-5 y)		Children (6-11 y)		Teens (12-17 y)	
	Change in avg # of ads viewed	% change	Change in avg # of ads viewed	% change	Change in avg # of ads viewed	% change
McDonald's	-142.6	-54%	-188.0	-59%	-177.3	-65%
Subway	-73.0	-69%	-99.3	-76%	-174.7	-85%
Pizza Hut	-29.9	-47%	-37.9	-54%	-103.9	-75%
Wendy's	-26.3	-44%	-37.4	-55%	-86.6	-72%
KFC	-11.2	-25%	-17.6	-36%	-61.0	-63%
Burger King	-2.2	-3%	-22.6	-24%	-68.5	-45%
Taco Bell	*		*		-73.4	-52%

\*Ads viewed increased for these age groups

Shading indicates a higher percentage decline in ads viewed compared to declines in TV viewing times for the age group

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

that had not advertised in 2012: Jimmy John's, Chipotle, and Xaxby's.

McDonald's and Subway TV ads viewed by preschoolers, children, and teens declined by more than 50% (see **Table 7**). However, preschoolers and children saw 40 to 50 more ads for McDonald's compared to Domino's, the second most frequent advertiser to these groups. In contrast, Subway fell from second in ads viewed by all age groups in 2012 to eighth for preschoolers and children and eleventh for teens in 2019. These declines were greater than 2013 to 2019 declines in TV

viewing times for all age groups (44% for preschoolers, 51% for children, and 62% for teens).

Percentage declines in TV ads viewed from 2012 to 2019 for Pizza Hut also exceeded declines in TV viewing times for all age groups, while declines in ads viewed for Wendy's exceeded declines in TV viewing times for children and teens (but not preschoolers). Declines in ad exposure for Burger King, KFC, and Taco Bell (teens only), were equal to or less than declines in TV viewing times for all age groups.

## Advertised products and menus

### Advertised products and menus

Product type	Definition
Product type	The specific product featured in the ad, including special menus, individual menu items, digital offerings (mobile apps and websites), and the restaurant in general.
Special menus	Menu items that restaurants promote together as a group, including value menus, meal bundles, kids' menus, and healthy menus.
Value menu	Individual menu items or combo meals that are offered at a special price or promoted as a good deal (e.g., dollar menu, value meals).
Meal bundles	Meals promoted for multiple people consisting of more than one type of menu item (e.g., main dish and sides).
Kids' menu	Individual menu items or meals (i.e., kids' meals) that are specifically labeled for kids.
Healthy menu	Individual menu items that are designated by the restaurants as "healthier" in some way (e.g., lower calories), including salads.
Individual menu items	One specific fast-food item or type of product. Individual menu items are also assigned to a specific category, including lunch/dinner main dishes, lunch/dinner sides, combo meals, pizza, salads, breakfast, sweets, snacks, coffee, and miscellaneous drinks. Individual menu items are also categorized as a special menu if the restaurant includes the item in that menu (e.g., side dishes or drinks on value menus).

Of the \$4.7 billion spent by the top fast-food advertisers in 2019, advertising for individual menu items or special menus represented 58% of total advertising spending (see **Figure 6**). Of the special menu types, value menus and meal bundles received the most advertising (6% of total spending), followed by healthy menus (1.4%) and kids' meals (0.6%). The remaining advertising promoted either the restaurant in general (38%) or digital offerings (mobile apps and websites, 4%).

Individual menu items (including items on value menus, meal bundles, and healthy menus) also represented more than one-half (57-61%) of fast-food TV ads viewed by all age groups, followed by ads for the restaurants in general (29-30%) (see **Figure 7**). Of the individual menu items advertised, lunch/dinner main dishes represented 43% of ads viewed by all youth, followed by combo meals (15-16%), pizza (11%), and sweets (9%).

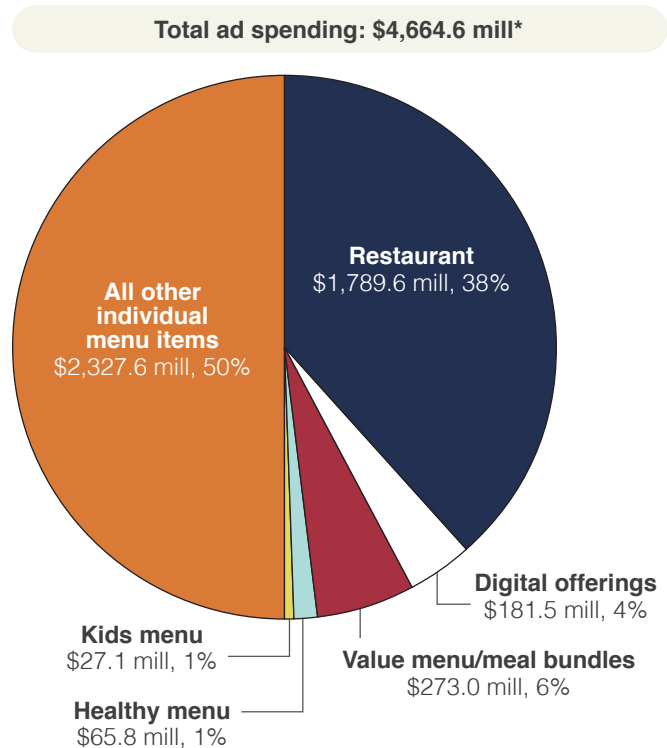
Kids' meals ranked a distant third in TV ads viewed by preschoolers and children, representing just 8% and 10% of total ads viewed by these age groups. However, they were highly targeted to 2- to 11-year-olds. Preschoolers viewed three times as many ads for kids' meals as adults did, while children viewed about 3.4 times as many. Notably, restaurants devoted less than 1% of their total advertising spending to kids' meals.

For teens, value menus/meal bundles ranked third in ads viewed by menu type (6-7% of ads viewed by all age groups), followed by kids' meals (5%). Ads for digital offerings represented another 4% of ads viewed by preschoolers, children, and teens. TV advertisements for healthy menu items accounted for just 1% of total ads viewed by all youth.



Value menus and meal bundles were the most commonly advertised types of special menus.

**Figure 6.** Total ad spending by product type: 2019



\*Spending by top fast-food advertisers  
Source: Analysis of 2019 Nielsen data

## Advertised products by restaurant

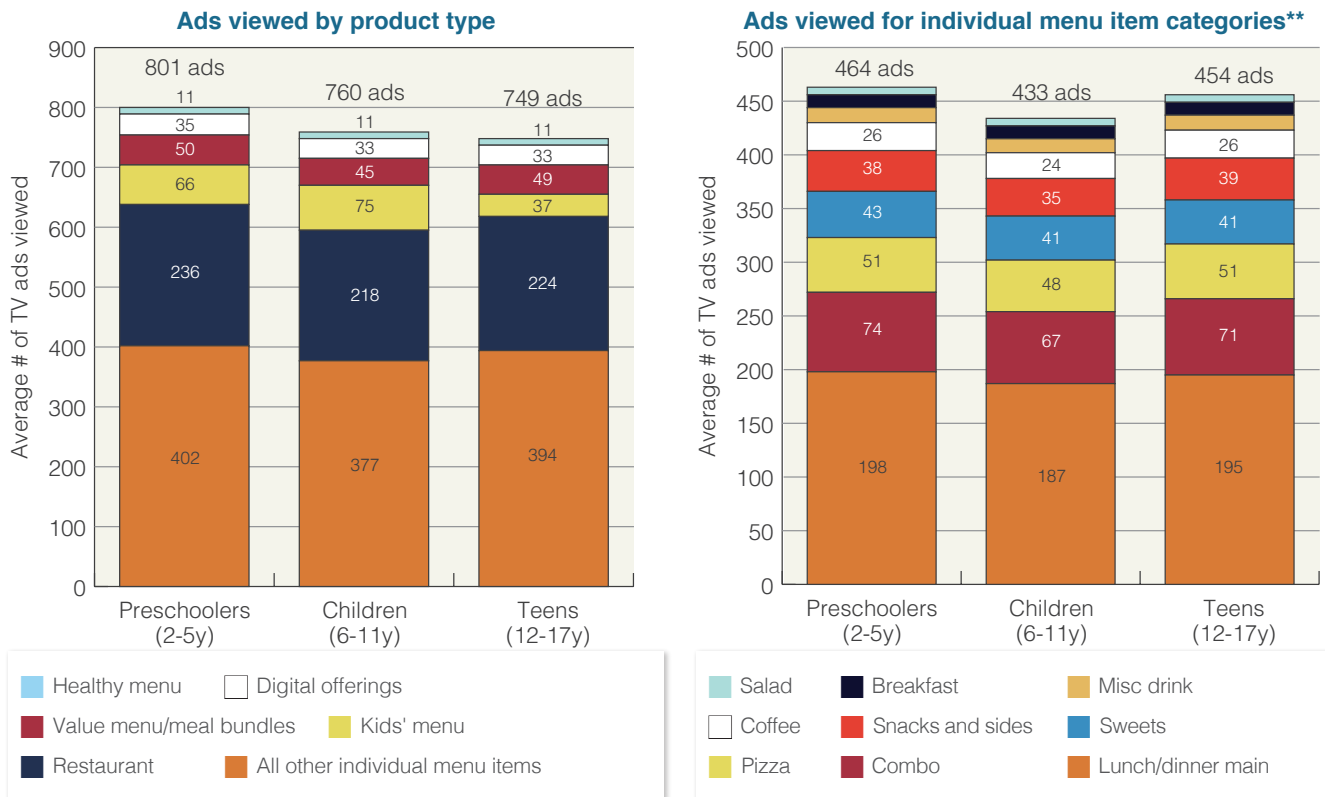
The majority of restaurants devoted one-quarter or more of total advertising spending to general restaurant ads. Dunkin' was the only restaurant that did not have any restaurant-level ads.

Eleven restaurants advertised their mobile app and/or website digital offerings (see **Table 8**). Domino's spent \$121 million, one-quarter of its total advertising budget, to promote its digital ordering options, followed by Little Caesars. These two restaurants devoted by far the most advertising to digital. McDonald's, Pizza Hut, and Wendy's each spent more than \$5 million on digital options, but that represented 4% or less of their total advertising budgets.

*Ads for special menus.* Although most restaurants offered value menu items or meal bundles ( $n=16$ ), salads and/or other healthy menu items ( $n=13$ ), and kids' meals ( $n=17$ ) (see **Appendix Table 2** for listing of special menus by restaurants), relatively few restaurants advertised these items.

Eleven restaurants advertised their value menus and/or meal bundles (see **Appendix Table 3**). KFC (\$20 Fill Up, \$5 Fill-up Box) and Taco Bell (\$5 Box, Taco Party Pack) devoted more

**Figure 7. TV ad exposure by product type and menu item category: 2019\***



\*Includes ads viewed for top fast-food advertisers

\*\*Some individual menu items are also included in special menus (e.g., value and healthy menus)

Source: Analysis of 2019 Nielsen data

than one-quarter of their ad budgets to this special menu type, the highest proportion for any restaurant. Wendy's value menu (Biggie Bag) also represented about 10% of its total ad spending.

Only seven restaurants advertised their healthy menus. However, Panera Bread (Baja Grain Bowl) and Zaxby's (Zalads) devoted more than one-quarter of their ad budgets to healthy menu items.

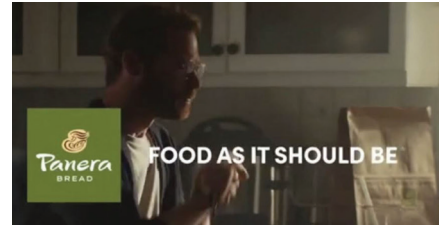
**Table 8. Ad spending on digital offerings: 2019**

Restaurant	Digital offerings (\$000)	% of total ad spending	Advertised products
Domino's	\$121,175.2	27%	Mobile app, Dominos.com
Little Caesars	\$31,877.3	18%	Mobile app, LittleCaesars.com
Pizza Hut	\$7,721.9	4%	PizzaHut.com
Chipotle	\$2,228.4	3%	Mobile app
Wendy's	\$5,409.4	2%	Mobile app
Papa John's	\$2,586.9	2%	PapaJohns.com
McDonald's	\$8,824.4	1%	Mobile app
Popeyes	\$769.1	1%	Mobile app
Starbucks	\$281.8	0%	Mobile app
Dunkin'	\$341.5	0%	Mobile app
Subway	\$124.4	0%	Mobile app

Source: Analysis of 2019 Nielsen data



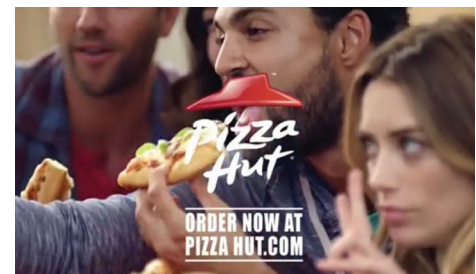
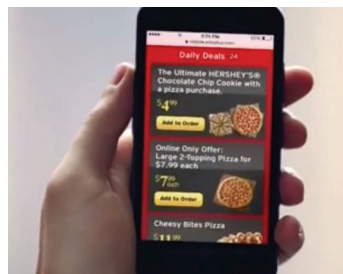
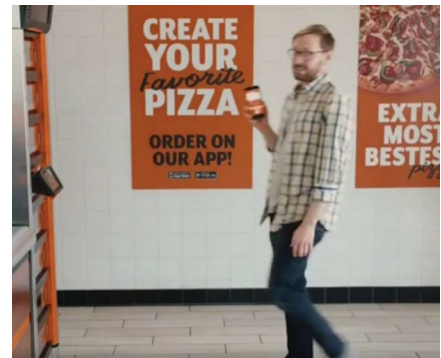
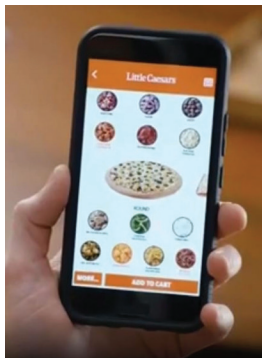
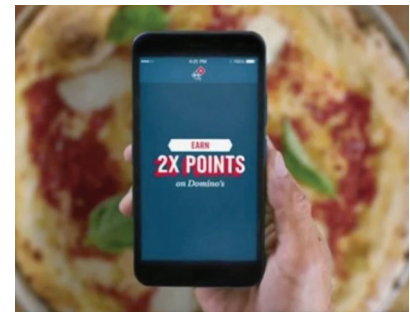
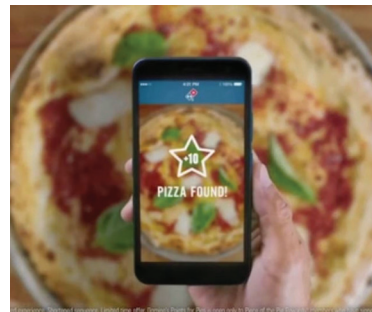
## Results



Panera Bread devoted more than one-quarter of its total ad budget to healthy menu items.

Kids' menus represented just 0.6% of all ad spending, and McDonald's (Happy Meal) was responsible for nearly all kids' meal advertising (\$26.3 out of \$27.1 mill in kids' meal ads). Five additional restaurants advertised their kids' meals, but each spent less than 1% of their total advertising budgets on these ads.

*Most advertised products.* Among individual menu items, Burger King's Impossible Whopper had the most advertising support (\$80 mill). Additional menu items with more than \$40 million in advertising included McDonald's coffee, Burger King Chicken Nuggets, and Taco Bell Nacho Fries. Additional individual menu items that ranked in the top-five most



Domino's, Little Caesars, and Pizza Hut spent the most to advertise their ordering apps and websites on TV.



**Table 9.** Top fast-food products advertised to preschoolers and children: 2019

Restaurant	Preschoolers (2-5 y)		Children (6-11 y)		Advertised products*
	Avg # of TV ads viewed	Targeted ratio	Avg # of TV ads viewed	Targeted ratio	
McDonald's	65.6	3.00	74.9	3.42	Happy Meal
Domino's	61.2	0.43	57.6	0.40	Restaurant
Burger King	40.9	0.36	37.7	0.33	Lunch/dinner main dishes, including Impossible Whopper, chicken nuggets, Pretzel Bacon King
Little Caesars	30.0	0.39	28.7	0.37	Pizza, including Extra Most Bestest, Pretzel Crust, 5-Meat Feast
McDonald's	27.0	0.38	25.3	0.35	Restaurant
Taco Bell	26.1	0.42	23.0	0.37	Value menu/meal deals, including \$5 Box, Taco Party Pack, and Double Chalupa Box
Domino's	21.3	0.42	20.4	0.40	Digital
Burger King	21.3	0.37	20.1	0.35	Restaurant
Arby's	19.4	0.38	18.9	0.37	Lunch dinner main dishes, including Bourbon BBQ Turkey, Fish Sandwich, Gyro, and Petite Filet Steak Sandwich
Subway	19.4	0.56	18.8	0.55	Lunch/dinner main dishes, including Steak Club, Southwest Chicken Club, and Italian Ciabatta

\*Product types with the most advertising, top-three menu items listed  
Source: Analysis of 2019 Nielsen data

advertised items for individual fast-food restaurants included ice cream (McDonald's McFlurry, Wendy's Frosty, Sonic, and Dairy Queen Blizzard) and sugary drinks (Sonic, Dunkin', and Starbucks). McDonald's also spent \$24 million to advertise its soft drinks and \$9 million on miscellaneous beverages, but these items did not rank in the top-five for the restaurant.

McDonald's Happy Meal ranked fourth in advertising spending on individual products by the restaurant. However, Happy Meal was responsible for by far the most advertising to preschoolers and children, contributing 8% of all fast-food TV ads viewed by preschoolers and 9.5% of ads viewed by children (see **Table 9**). Sonic's Wacky Pack was the only other kids' meal advertised to preschoolers and children, but they viewed just 0.4 and 0.3 of these ads on average in 2019. Domino's restaurant ads ranked second among all

fast-food products advertised to preschoolers and children, representing approximately 7% of all TV ads viewed.

The top-ten products advertised to preschoolers and children also included restaurant-level ads for McDonald's and Burger King, digital ads for Domino's, value menu/meal deals from Taco Bell, and main dish items from Burger King, Little Caesars, Arby's, and Subway.

For teens, McDonald's Happy Meal ads (targeted to preschoolers and children) also had the highest targeted ratio of ads viewed compared to adults. Some fast-food products may also have targeted teens, as evidenced by teen-targeted ratios of 0.40 or greater (see **Table 10**). Products with the highest teen-targeted ratios include Cicis Pizza and Popeyes restaurant ads, Pizza Hut P'Zone (pizza calzone), and Sonic drinks.



Burger King spent \$80 million to advertise its Impossible Whopper meatless burger, the most spent on any individual menu item.



TV ads targeted to teens included Cicis Pizza, Pizza Hut P'Zone, and Sonic drinks.

**Table 10.** Fast-food products with the highest teen-targeted ratios: 2019\*

Restaurant	Teens (12-17 y)		Advertised product
	Avg # of TV ads viewed	Targeted ratio	
Cicis Pizza	8.9	0.53	Restaurant
Pizza Hut	7.2	0.44	P'Zone (lunch/dinner main dish)
Popeyes	18.0	0.44	Restaurant
Sonic	8.5	0.43	Misc drinks
Pizza Hut	12.9	0.42	Restaurant
Burger King	5.4	0.42	Crispy Taco (snack)
Subway	8.1	0.42	Restaurant
Taco Bell	8.6	0.41	Nacho Fries (snack)
Chipotle	7.7	0.41	Restaurant
Dairy Queen	10.5	0.41	Blizzard (sweets)

\*Includes products with 5 or more ads viewed and targeted ratios greater than 0.40  
Source: Analysis of 2019 Nielsen data

### Key findings: Traditional media advertising

- In 2019, 274 fast-food restaurants spent more than \$5 billion in total advertising, an increase of 9% versus 2012.

- TV advertising represented the majority of fast-food ad spending (91%), followed by outdoor (4%), radio (3%), and digital (2%) ads. TV advertising spending increased by 12% compared to 2012, while digital advertising spending increased by 74%.

- In 2019, preschoolers (2-5 years) viewed on average 830.0 TV ads for fast food (2.3 ads-per-day), children (6-11 years) viewed 786.5 ads, and teens (12-17 years) viewed 774.5 ads.
- Although the number of fast-food TV ads viewed by preschoolers, children, and teens declined from 2012 to 2019 (-19%, -33%, and -56%, respectively), these declines were lower than expected given even greater decreases in average TV viewing times from 2013 to 2019 (-44%, -51%, and -62%, respectively).
- Despite an overall decline in fast-food TV ad exposure, the number of ads viewed by both preschoolers and children increased for 11 of the 27 top fast-food advertisers, including Sonic (+77% for preschoolers and +37% for children), Domino's (+37% and +9%), and Little Caesars (+22% and +15%). Taco Bell ads viewed by preschoolers increased by 30%, but ads viewed by children did not change.
- Restaurants with the largest declines in ads viewed by preschoolers and children included McDonald's (-54% and -59%), Pizza Hut (-47% and -54%), and Subway (-69% and -76%). TV ads viewed by teens declined for all restaurants, including reductions of 50% or more for McDonald's, Taco Bell, KFC, Pizza Hut, Wendy's, and Subway.

### Advertising by restaurant

- The top-six fast-food companies (McDonald's Corp, Yum! Brands [Taco Bell, Pizza Hut, KFC], Roark Capital Group [Sonic, Arby's Jimmy John's, Hardee's Carl's Jr.], Restaurant Brands Intl [Burger King, Popeyes], Domino's Pizza, and Doctor's Associates [Subway]), were responsible for 66% of all fast-food advertising spending and 71% to 72% of TV ads viewed by all youth in 2019.
- At the restaurant level, McDonald's remained the top fast-food advertiser in 2019, spending \$779 million and accounting for 15% to 16% of ads viewed by preschoolers and children, and 12% of ads viewed by teens.
- Domino's ranked second in advertising spending (\$442 million), while Taco Bell and Burger King each spent over \$300 million. These three restaurants accounted for approximately one-quarter of all fast-food TV ads viewed by preschoolers, children, and teens.
- Only seven of the top fast-food advertisers reduced their advertising spending from 2012 to 2017, including McDonald's (-20%), Subway (-58%), Wendy's (-10%), KFC (-22%), and Pizza Hut (-21%). These restaurants also had among the largest decreases in ads viewed by youth (declines of 25% to 85%).
- Domino's, Burger King, and Taco Bell increased their advertising spending by more than \$100 million from 2012 to 2019. Domino's ad spending more than doubled (+131%) and Burger King and Taco Bell spending increased by 48% and 37%, respectively.

### Advertising by menu and product type

- Individual menu items (excluding items on special menus) represented 49% of total ad spending and 50% to 53% of TV ads viewed by all age groups. General restaurant ads contributed another 38% of ad spending and 29% to 30% of TV ads viewed.
- Restaurants devoted 4% of their total ad spending to promote their websites and/or mobile ordering apps, led by Domino's (\$121 mill, 27% of its budget) and Little Caesars (\$32 mill, 18%). Digital offerings also represented 4% of TV ads viewed by all age groups.
- Despite being highly targeted to preschoolers and children, kids' meals accounted for 8% and 10% of fast-food TV ads viewed by these age groups. However, kids' meals represented less than 1% of total ad spending. Kids' meal ads almost exclusively promoted McDonald's Happy Meals, which contributed more than 96% of ad spending and TV ads viewed for kids' meals.
- Value menus and meal bundles were the most widely advertised special menu items (6% of total ad spending and 6-7% of ads viewed), while healthy menu items accounted for just 1% of total ad spending and 1% of TV ads viewed by all youth.



## ADVERTISING ON CHILDREN'S TV

### Children's TV advertising

#### Children's TV

### Definition

Television channels aimed primarily at children under 12 years old that accept advertising, including Disney XD, Nickelodeon, NickToons, and Cartoon Network. Preschool children's networks include Nick Jr and Universal Kids.

#### Other TV

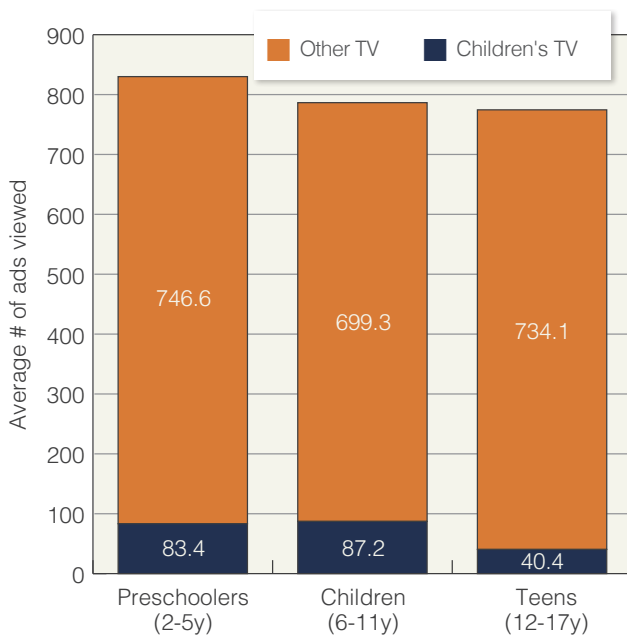
All other (i.e., not children's) television channels.

#### Children's Food & Beverage Advertising Initiative (CFBAI)

The food industry's voluntary children's advertising self-regulatory program. Participating companies pledge to advertise only foods that meet nutrition standards in child-directed media (including children's TV).<sup>4</sup> McDonald's and Burger King are the only fast-food restaurants to participate in CFBAI.

Fast-food restaurants spent \$17.7 million to advertise on children's TV channels in 2019, less than 0.4% of the \$5.0 billion spent on fast-food TV advertising in total. As a result, young people were exposed to the vast majority of fast-food ads on other TV, not children's TV channels (see **Figure 8**). Preschoolers, children, and teens were exposed to 10%, 11%, and 5% of fast-food ads viewed, respectively, on children's TV. Although preschoolers saw more fast-food ads than other age groups in total, children saw more fast-food ads on children's TV than preschoolers saw.

**Figure 8.** Ads viewed on children's TV and other TV: 2019



Source: Analysis of 2019 Nielsen data

**Table 11.** Ad spending by restaurant on children's TV: 2019

	Restaurant	Ad spending on children's TV (\$000)	% of total TV ad spending
1	McDonald's	\$14,367.9	2%
2	Jimmy John's	\$1,386.9	4%
3	Sonic	\$694.9	<1%
4	Subway	\$517.0	<1%
5	Cicis Pizza	\$263.0	1%
6	Chick-fil-A	\$180.1	<1%
7	Papa John's	\$157.5	<1%
8	Chipotle	\$106.4	<1%
9	Pizza Hut	\$44.5	<1%
10	Arby's	\$4.1	<1%
11	Taco Bell	\$2.2	<1%
12	Little Caesars	\$2.1	<1%
13	Domino's	\$2.1	<1%
14	Dunkin'	\$1.0	<1%
15	Wendy's	\$1.0	<1%

Source: Analysis of 2019 Nielsen data

### Ad spending and exposure by restaurant

Fifteen fast-food restaurants advertised on children's TV in 2019 (see **Table 11**). On average, these restaurants allocated 0.6% of their total TV advertising spending to children's TV. However, spending and ads viewed on children's TV varied widely by restaurant.

McDonald's was the only CFBAI-participating fast-food company to advertise on children's TV. It was also responsible for 81% of total fast-food ad spending on children's TV, 75% of fast-food ads viewed by preschoolers on children's TV, and 81% of ads viewed by children (see **Table 12**). Moreover, more than one-half of all McDonald's ads viewed by preschoolers and children were seen on children's TV.

**Table 12.** Exposure to ads on children’s TV by restaurant: 2016 vs. 2019

Restaurant	Preschoolers (2-5 y)				Children (6-11 y)			
	Avg # of ads viewed		% of total	% change	Avg # of ads viewed		% of total	% change
	2016	2019	2019	2016-2019	2016	2019	2019	2016-2019
McDonald's	135.3	62.6	51%	-54%	155.9	70.6	55%	-55%
Jimmy John's	**	8.0	57%		**	6.1	54%	
Sonic	6.4	3.3	6%	-48%	6.3	2.0	4%	-68%
Subway	12.1	3.9	12%	-68%	17.0	3.9	12%	-77%
Cicis Pizza	**	2.9	26%		**	1.9	19%	
Chick-fil-A	**	0.9	11%		**	0.6	9%	
Papa John's	3.1	0.5	2%	-84%	0.9	0.5	3%	-44%
Chipotle	**	0.7	8%		**	0.9	11%	
Pizza Hut	0.1	0.6	2%	+600%	0.1	0.7	2%	+700%
Wendy's	8.2	<0.1	<1%	-99%	9.8	<0.1	<1%	-99%

\*\*Data not available, restaurant was not included in 2017 report

Source: Analysis of 2019 Nielsen data; FACTS 2017

While Jimmy John’s was not in the top-25 restaurants for overall ad spending, it had the second-highest ad spending on children’s TV. It was also responsible for the second-most ads viewed on children’s TV for both preschoolers and children, which represented more than half of all Jimmy John’s ads viewed for both age groups. Sonic ranked third in children’s TV advertising spending, but a relatively small proportion of Sonic ads were viewed on children’s TV.

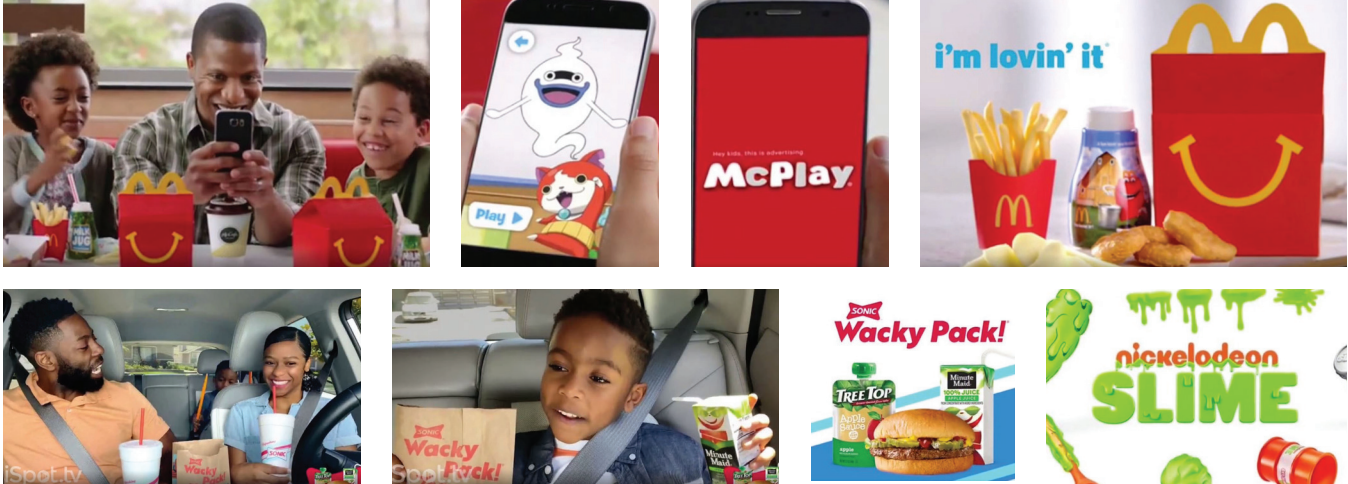
Although Cicis Pizza, Subway, Chipotle, and Chick-fil-A spent less than Sonic on children’s TV advertising, all had higher proportions of ads viewed on children’s TV for both age groups (8-26%). Pizza Hut was the only restaurant that increased its advertising on children’s TV in 2019 versus 2016. Preschoolers’ and children’s exposure to ads on children’s TV declined for all other restaurants during this time.<sup>iii</sup>



Cicis Pizza and Jimmy John’s ranked among the top-five fast-food restaurants advertised on children’s TV.

<sup>iii</sup>. 2016 data are not available for all restaurants.





McDonald's and Sonic advertised kids' meals on children's TV, while other restaurants primarily advertised the restaurant and/or regular menu items.

### Advertised products

**Appendix Table 4** details the types of products advertised on children's TV in 2019 by restaurant and the channels on which they appeared. Not surprisingly, preschoolers and children viewed approximately three to six times as many ads for products that appeared on children's TV than adults viewed. However, most of these restaurants did not advertise their kids' meals on children's TV. McDonald's, Jimmy John's, and Sonic were the only three restaurants with kids' meal advertising on children's TV. Kids' meals represented more than 99% of McDonald's advertising spending on children's TV, but only 38% of ad spending by Jimmy John's and 23% by Sonic.

Moreover, all restaurants with advertising on children's TV advertised their regular menu items or the restaurant directly to children on children's TV. Subway regular menu items such as the Southwest Chicken Club and Steak Club, Jimmy John's restaurant and Frenchie sandwich, and Cicis Pizza restaurant ranked in the top-five fast-food products advertised on children's TV. Sonic, Papa John's, and Pizza Hut advertised four or more different types of regular menu items on children's TV.

### Advertising by children's TV channel

Nearly all restaurants with child-directed TV ads advertised on Nickelodeon (Nick and NKTNS), which represented 66% of ads viewed by preschoolers on children's TV and 56% of ads viewed by children. CartoonNetwork represented 22% and 29% of children's TV ads viewed, respectively. Notably, McDonald's Happy Meals and restaurant were the only

products advertised on Disney XD (DXD) (11% and 16% of children's TV ads viewed). Disney has established nutrition standards for products that can be advertised directly to children on its children's TV networks and other media properties, the only media company to do so.<sup>5</sup>

Some pizza restaurants also advertised on TV channels aimed at preschoolers: Nick Jr. (NickJr)<sup>6</sup> and Universal Kids (UKids).<sup>7</sup> However, they did not advertise kids' meals on these channels. Products advertised included restaurant ads for Cicis Pizza, Little Caesars, and Pizza Hut and regular menu items from Pizza Hut.

### Key findings: Advertising on children's TV

- All age groups (preschoolers, children, and teens) were exposed to approximately 90% or more of fast-food ads viewed on other TV, not children's TV channels.
- Fifteen fast-food restaurants advertised on children's TV in 2019, allocating on average 0.6% of their total TV advertising spending to children's TV.
- McDonald's was the only CFBAI-participating fast-food company to advertise on children's TV. It was responsible for 81% of children's TV ad spending and the majority of ads viewed on children's TV by preschoolers (75%) and children (81%).
- McDonald's, Jimmy John's, and Sonic were the only three restaurants that advertised kids' meals on children's TV; all 15 restaurants advertised their regular menu items and/or restaurant directly to children on children's TV.

## Results

- Nearly all restaurants with child-directed TV ads advertised on Nickelodeon and/or Cartoon Network (more than 80% of ads viewed by preschoolers and children on children's TV). McDonald's was the only restaurant to advertise on Disney XD, which is the only children's TV network to set nutrition standards for foods that can be advertised.
- Cici's Pizza, Little Caesars, and Pizza Hut advertised on preschool networks (NickJr and UKids), but they did not advertise kids' meals.

## ADVERTISING TO HISPANIC AND BLACK YOUTH

This section documents fast-food advertising targeted to Hispanic and Black preschoolers, children, and teens. Hispanic-targeted advertising includes advertising on Spanish-language TV. Black-targeted advertising includes advertising on Black-targeted TV, as well as disproportionate TV ad exposure by Black relative to White youth on all national TV programming.

### Advertising on Spanish-language TV

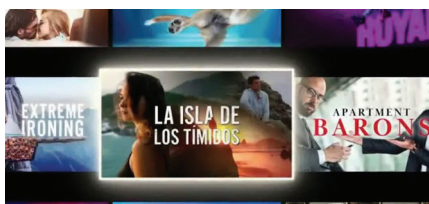
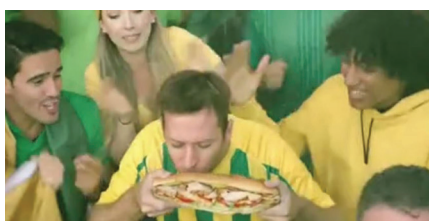
#### TV advertising to Hispanic youth

#### Definition

Spanish-language TV	TV programming on Spanish cable and broadcast programming (e.g., Telemundo, Univision). Spanish-language TV ad spending includes advertising expenditures on all Spanish-language TV.
Hispanic youth TV advertising exposure	The average number of TV ads viewed by Hispanic preschoolers (2-5 years), children (6-11 years), and teens (12-17 years) on Spanish-language TV. Exposure to Spanish-language TV ads is calculated based on the number of persons on Nielsen's viewer panel living in Hispanic households.

In 2019, total advertising spending by fast-food restaurants on Spanish-language TV was \$318 million. Spanish-language TV ad spending increased by 33% from 2012 to 2019, in contrast to total TV ad spending, which went up by 9% during the same time period.

As in 2012, Hispanic preschoolers viewed more fast-food ads on Spanish-language TV than any other group of Hispanic youth. They saw an average of 342.3 ads in 2019 (approximately one ad-per-day). Hispanic children viewed on average 251.3 fast-food ads on Spanish-language TV, while Hispanic teens viewed 210.4 ads.



Domino's, Subway, and Taco Bell ranked among the top-five restaurants in ads viewed by Hispanic youth on Spanish-language TV.



**Table 13.** Changes in Spanish-language TV ad spending by restaurant: 2012 vs. 2019

Restaurant*	Spanish-language TV ad spending (\$000)			% of TV ad spending in 2019
	2012	2019	Change	
McDonald's	\$75,519.8	\$66,003.6	-13%	10%
Domino's	\$27,166.3	\$34,871.2	+28%	8%
Subway	\$23,643.3	\$34,140.3	+44%	16%
Wendy's	\$15,641.2	\$31,557.4	+102%	14%
Taco Bell	\$1,168.7	\$25,336.4	+2068%	7%
Chick-fil-A	\$0.0	\$18,213.4	**	18%
KFC	\$13,313.1	\$17,046.8	+28%	9%
Burger King	\$35,971.8	\$16,446.9	-54%	5%
Little Caesars	\$4,397.9	\$15,138.6	+244%	9%
Sonic	\$14,019.9	\$14,346.6	+2%	7%
Pizza Hut	\$9,979.1	\$12,356.3	+24%	7%
Popeyes	\$13,279.6	\$9,507.8	-28%	8%
Dunkin'	\$0.0	\$7,871.0	**	5%
Papa John's	\$1,121.1	\$7,859.6	+601%	6%
Cicis Pizza	\$676.8	\$7,832.5	+1057%	37%
Starbucks	\$3,313.0	\$0.0	**	0%
<b>Total</b>	<b>\$239,216.2</b>	<b>\$318,528.3</b>	<b>33%</b>	<b>9%</b>

Shading indicates a higher-than-average percentage of TV advertising spending on Spanish-language TV in 2019

\*One additional restaurant (El Pollo Loco) spent <\$1,000 on Spanish-language TV ads

\*\*Restaurant did not advertise on Spanish-language TV in either 2012 or 2019

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013; Targeted Marketing Rudd Report 2019

From 2012 to 2019, there was a slight increase in number of Spanish-language TV ads viewed by preschoolers (+2%) and children (+7%) and a small decrease for Hispanic teens who saw 3% fewer of these ads. These small changes differ from large decreases in total fast-food ads viewed by preschoolers, children, and teens on all other TV during the same time (-19%, -33%, and -56%, respectively).

### Spending on Spanish-language TV advertising by restaurant

In 2019, 15 of the 27 top fast-food advertisers advertised on Spanish-language TV (see **Table 13**). Two of these restaurants (Dunkin' and Chick-fil-A) did not advertise on Spanish-language TV in 2012. Starbucks was the only top fast-food advertiser to advertise on Spanish-language TV in 2012 but not in 2019.

On average, fast-food advertisers on Spanish-language TV allocated 9% of their total TV ad budgets to Spanish-language TV in 2019. As in total ad spending, McDonald's and Domino's ranked first and second in Spanish-language TV ads, while Taco Bell ranked fifth in Spanish-language advertising (compared to third in total ad spending). A few restaurants allocated a disproportionately high percentage of their TV advertising spending to Spanish-language TV. Cicis

Pizza devoted more than one-third of its budget to Spanish-language (more than any other restaurant), while Subway, Wendy's, and Chick-fil-A allocated 14% to 18% of their TV advertising to Spanish-language TV.

Twelve of the 15 restaurants increased their Spanish-language TV ad spending from 2012 to 2019. Taco Bell and Cicis Pizza had the greatest increases 10 to 20 times, while Little Caesars and Papa John's also saw large increases (244% and 601%, respectively). Only Burger King, Popeyes, and McDonald's decreased their Spanish-language TV advertising spending during this time. Despite these declines, McDonald's maintained its position as the top Spanish-language TV advertiser in 2019, but Burger King dropped from second to eighth in Spanish-language ad spending.

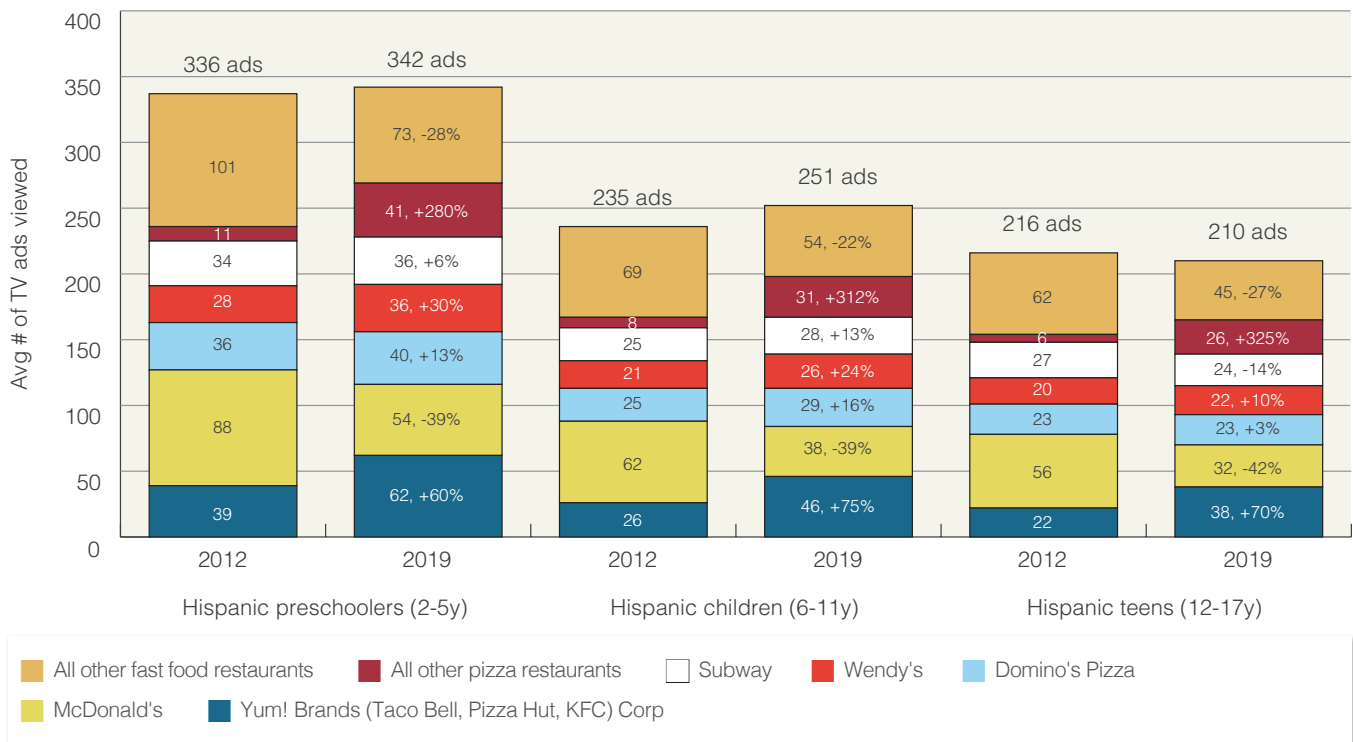
### Hispanic youth exposure to Spanish-language TV ads by restaurant

The five restaurants with the most Spanish-language TV advertising spending (McDonald's, Domino's, Subway, Wendy's, and Taco Bell) also led in Spanish-language TV ads viewed by Hispanic youth, accounting for 55% of the total (see **Ranking Table 4**).

Most changes in Spanish-language TV ads viewed by Hispanic youth from 2012 to 2019 for individual restaurants were



**Figure 9.** Changes in Hispanic youth exposure to ads on Spanish-language TV: 2012 vs. 2019



Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

consistent with changes in spending on Spanish-language TV (see **Figure 9** and **Ranking Table 4**). The number of ads viewed by Hispanic youth across all age groups increased for most restaurants in 2019, with the biggest increases for Taco Bell (1150% or more), Papa John's (577% or more), Cici's Pizza (571% or more), and Little Caesars (147% or more).

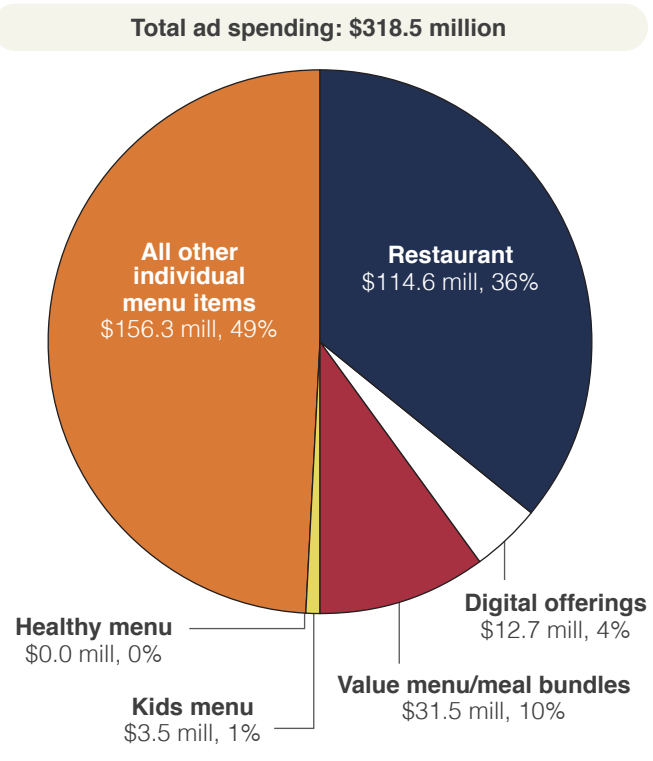
McDonald's, Burger King, and Popeyes were the only restaurants with a decrease in ads viewed by Hispanic youth on Spanish-language TV between 2012 and 2019. Of note, in 2012 McDonald's was responsible for approximately one-quarter of fast-food ads viewed by Hispanic youth, but this proportion decreased significantly in 2019 to approximately 15%.

**Advertising by product and menu type**

Restaurants spent the majority of their Spanish-language TV advertising budgets on individual menu items and restaurant-level ads (see **Figure 10**), consistent with restaurants' total TV advertising spending. However, restaurants devoted somewhat more Spanish-language TV advertising to value menus/meal bundles than total TV advertising (10% vs. 6%). Although restaurants spent approximately 1% of their total ad budgets on healthy menu items, there were no ads for healthy menu items on Spanish-language TV in 2019.

**Appendix Table 5** presents the fast-food products with the most advertising on Spanish-language TV in 2019. In addition

**Figure 10.** Spanish-language TV ad spending by product and menu type: 2019



Source: Analysis of 2019 Nielsen data

to general restaurant ads for several restaurants (Domino's, McDonald's, Pizza Hut, Wendy's, Popeye's, Chick-fil-A, and Taco Bell), Subway sandwiches, Little Caesars pizza, McDonald's Grand McExtreme Bacon Burger, and Taco Bell's \$5 Box combo also appeared at the top of the list of fast-food products advertised on Spanish-language TV.

McDonald's Happy Meals were the only kids' meals advertised on Spanish-language TV in 2019. However, these ads primarily targeted parents as Hispanic adults (18-49 years) were more likely to see these ads than were Hispanic preschoolers or children (3.6 vs. 2.9 and 2.0 ads viewed, respectively).

## TV advertising targeted to Black youth

### TV advertising to Black youth

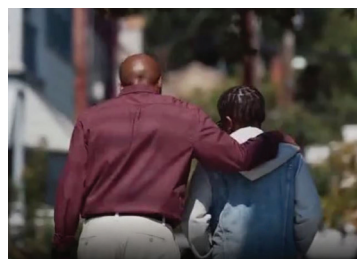
#### Definitions

Black-targeted TV	TV channels where more than 50% of viewers self-identify as Black, including BET, VH1, and TV1. Black-targeted TV spending includes advertising expenditures on all Black-targeted TV.
Black youth TV ad exposure	The average number of TV advertisements viewed by Black preschoolers (2-5 years), children (6-11 years), and teens (12-17 years) on all network, cable, and syndicated TV programming (i.e., national TV, excludes spot TV). <sup>iv</sup>
Black-targeted ratios	A measure of relative exposure to TV ads by Black versus White youth, calculated by dividing GRPs for Black preschoolers, children, or teens by GRPs for White preschoolers, children, or teens.

Our analysis of advertising targeted to Black youth includes advertising spending on Black-targeted TV channels, as well as comparisons of exposure to fast-food ads by Black versus White youth on all national TV programming. Disproportionate exposure by Black children and teens on national TV indicates that fast-food restaurants placed their ads during TV programming that was viewed by relatively more Black youth compared to White youth.<sup>8</sup>

### Ad spending on Black-targeted TV by restaurant

In 2019, 23 restaurants spent \$99 million to advertise on Black-targeted TV, including 22 of the 27 top fast-food advertisers plus Captain D's (see **Table 14**). On average, these restaurants spent 3% of their national TV ad spending budgets on Black-targeted TV.



McDonald's increased its ad spending on Black-targeted TV by 57% from 2017 to 2019.

<sup>iv</sup> In 2019, 90% of all fast-food restaurant ads viewed by youth appeared on national TV.

**Table 14.** Black-targeted TV ad spending: 2019

Restaurant	Advertising spending on Black-targeted TV (\$000)			% of TV ad spending	
	2017	2019	Change	2017	2019
Domino's	\$12,027	\$15,758.9	+31%	4%	4%
McDonald's	\$7,421	\$11,640.1	+57%	1%	3%
Burger King	\$9,564	\$10,355.1	+8%	3%	3%
Taco Bell	\$12,835	\$9,992.6	-22%	4%	3%
Wendy's	\$8,426	\$7,072.3	-16%	4%	3%
Little Caesars	\$5,147	\$6,850.0	+33%	3%	4%
Popeyes	**	\$6,262.7			7%
Pizza Hut	\$5,421	\$4,331.7	-20%	3%	2%
KFC	\$3,083	\$4,155.0	+35%	2%	2%
Sonic	\$4,520	\$3,699.0	-18%	2%	3%
Subway	\$5,145	\$3,114.1	-39%	1%	2%
Papa John's	**	\$2,882.8			3%
Cicis Pizza	**	\$2,495.1			12%
Arby's	\$8,004	\$1,814.3	-77%	5%	2%
Dunkin'	**	\$1,771.7			2%
Dairy Queen	**	\$1,446.1			2%
Jimmy John's	**	\$1,395.2			4%
Captain D's*	**	\$1,325.3			9%
Chipotle	**	\$884.5			1%
Zaxby's	**	\$656.3			4%
Chick-fil-A	**	\$637.8			1%
Panera Bread	**	\$429.8			1%
Starbucks	**	\$9.7			<1%
<b>Total</b>		<b>\$98,980.4</b>			<b>3%</b>

\*Restaurant is not included in the list of 27 top fast-food advertisers

\*\*Restaurant was not a top-advertiser in the Targeted Marketing Rudd Report, 2017 data are not available

Shading indicates higher-than-average percentage of national TV advertising spent on Black-targeted TV

Source: Analysis of 2019 Nielsen data; Targeted Marketing Rudd Report 2019

The top-four advertisers—Domino's, McDonald's, Burger King, and Taco Bell—accounted for one-half of all ad spending on Black-targeted TV. These four restaurants also spent the most on total TV advertising. However, Domino's ranked first in ad spending on Black-targeted TV, while McDonald's ranked first in total TV ad spending.

A few restaurants dedicated a higher proportion of their ad dollars to Black-targeted TV. Cicis Pizza dedicated 12% of its total TV ad spending to Black-targeted TV and ranked 13th in ad spending on Black-targeted TV (it did not rank in the top-25 for total ad spending). Captain D's and Popeyes also exceeded the average (9% and 7%, respectively).

Compared to 2017, Domino's, McDonald's, Burger King, Little Caesars, and KFC increased their advertising spending on Black-targeted TV. McDonald's increased its spending by more than 50% and moved from number-six in Black-targeted TV ad spending in 2017 to number-two in 2019. In contrast,

Taco Bell declined from first in 2017 to fourth in 2019, with a 22% decline in Black-targeted TV advertising spending.

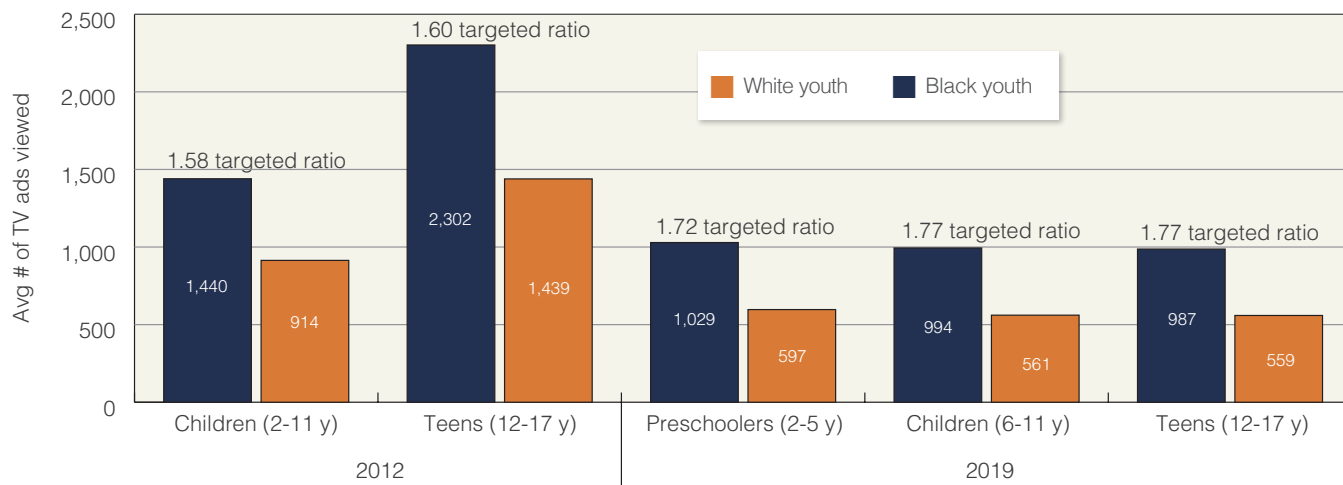
### Black youth ad exposure and TV viewing

On all national TV in 2019, Black preschoolers (2-5 years) and Black children (6-11 years) saw on average 1,029.1 and 993.9 fast-food ads, respectively, or nearly 3 ads-per-day. Black teens (12-17 years) viewed 986.9 fast-food ads. Compared to their White peers, Black preschoolers viewed 72% more fast-food ads, and Black children and teens viewed 77% more ads (see **Figure 11**).

Moreover, disparities in exposure by Black versus White youth have increased compared to 2012. From 2012 to 2019, total exposure to TV ads for fast food by Black preschoolers and children decreased by 30%,<sup>v</sup> while Black teens' exposure decreased by 57%. In comparison, declines in fast-food ad

<sup>v</sup> 2012 data combined preschoolers and children (ages 2-11), so we averaged exposure for preschoolers and children in 2019 to report changes in exposure.

**Figure 11.** Differences in TV ad exposure for Black vs. White youth: 2012 vs. 2019



Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

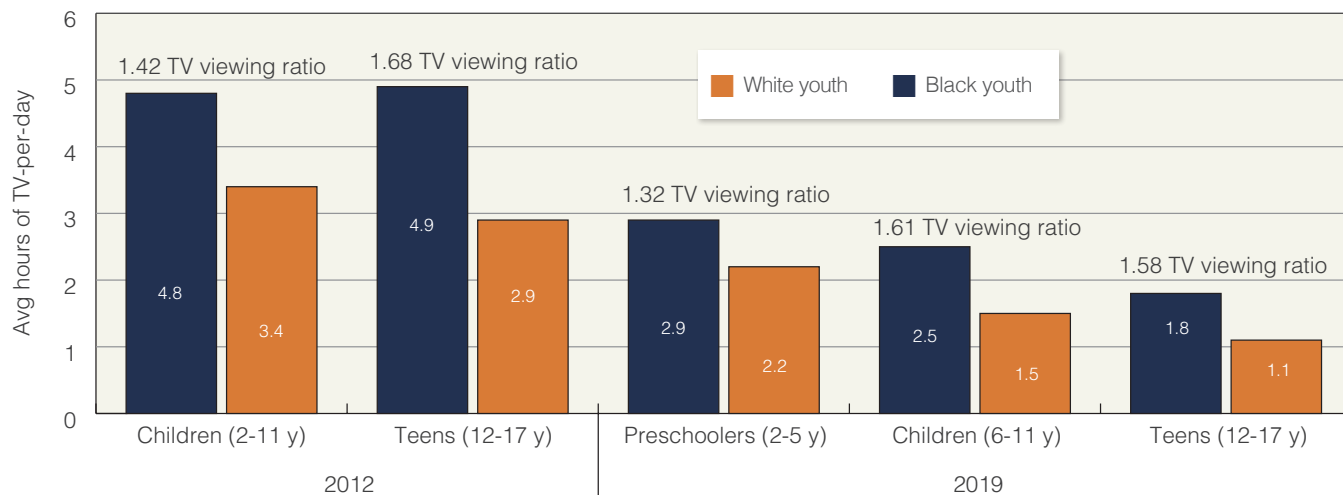
exposure were somewhat higher for White youth, including a 37% decline for White preschoolers and children and a 61% decline for White teens.

Differences between ads viewed by Black and White youth can be explained partially by differences in the average amount of time they spent watching TV (see **Figure 12**). In 2019, on average Black preschoolers watched 32% more hours of TV than White preschoolers watched; differences were greater between Black and White children (61%) and teens (58%). However, differences in ad exposure in 2019

across all age groups were higher than expected given these differences in TV viewing times.

Furthermore, decreases in fast-food TV ads viewed by Black youth from 2012 to 2019 were less than expected given decreases in time spent viewing TV. For example, Black preschoolers and children viewed 30% fewer ads, compared to a 45% reduction in TV viewing time. Similarly, Black teens' exposure to fast-food ads decreased by 57%, but their TV viewing time declined by 64% over the same time period.

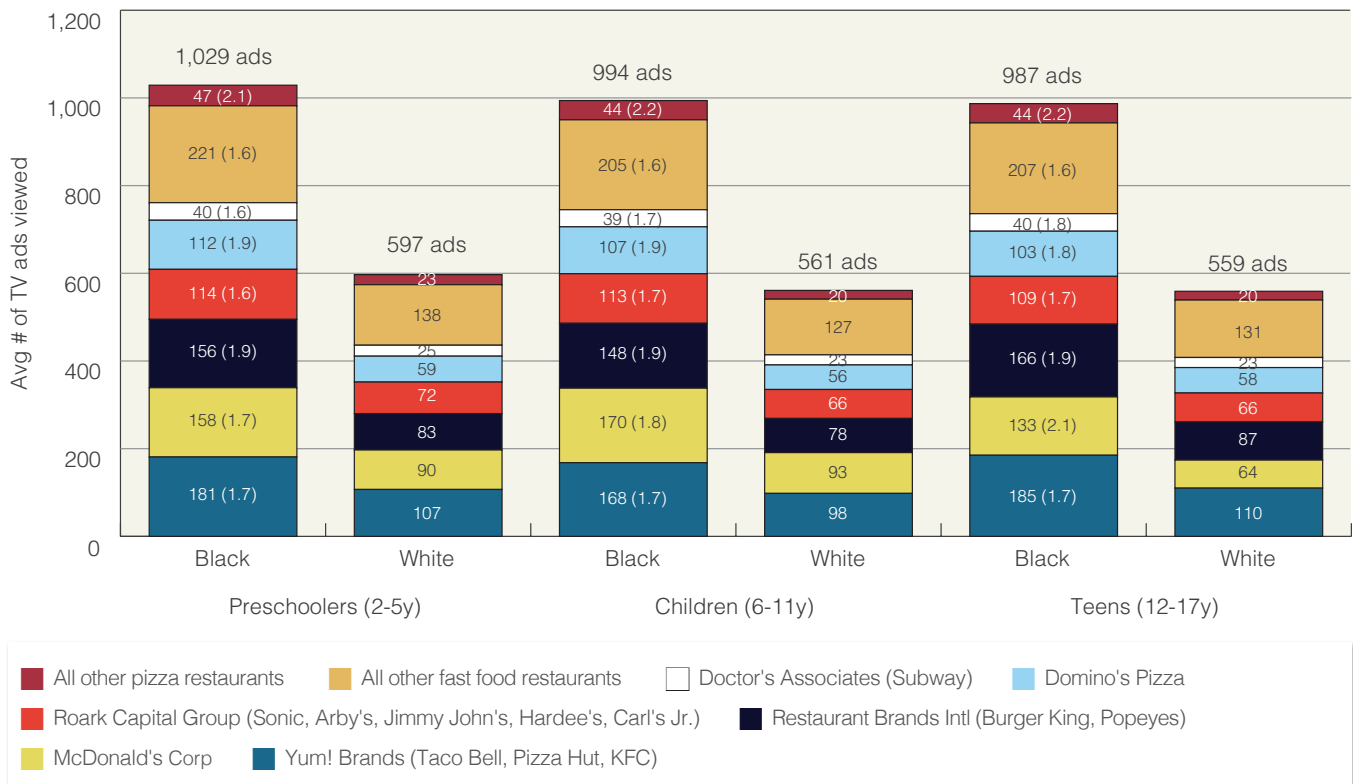
**Figure 12.** Differences in TV viewing time for Black vs. White youth: 2012 and 2019



Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013



**Figure 13.** Disparities in TV ad exposure between Black and White youth by company: 2019



Numbers in parentheses are targeted ratios of ads viewed by Black youth vs. White youth  
 Source: Analysis of 2019 Nielsen data

### Black youth exposure to TV ads by company and restaurant

In 2019, the top-six fast-food companies were also responsible for 73% to 75% of fast-food ads viewed by Black youth (see **Figure 13**). Some companies advertised disproportionately more to Black youth. Black preschoolers, children, and teens saw approximately 90% or more ads for Restaurant Brands Intl (Burger King and Popeyes), Domino's Pizza, and other pizza restaurants (Cicis Pizza and Papa John's) compared to their White peers. Black teens saw more than twice as many ads for McDonald's compared to White teens.

The ten restaurants with the most TV advertising to all youth also were responsible for the most advertising to Black youth.<sup>vi</sup> Four restaurants—McDonald's, Burger King, Domino's, and Taco Bell—contributed 46% of ads viewed by preschoolers and teens and 47% of ads viewed by children (see **Ranking Tables 5 and 6**). Six restaurants—Sonic, Little Caesars, Wendy's, KFC, Popeyes, Pizza Hut, and Subway—contributed another one-third of ads viewed by Black preschoolers and children (34%) and Black teens (35%).

Despite a 30% overall decline in fast-food ad exposure from 2012 to 2019, Black children and preschoolers' exposure to TV ads increased by 4% to 884% for eight restaurants, including Domino's (12%), Taco Bell (4%), Little Caesars (23%), and Sonic (44%). Conversely, declines in ads viewed by Black preschoolers and children exceeded 50% for McDonald's, Wendy's, Pizza Hut, and Subway. These changes were comparable to changes in ads viewed by all preschoolers and children for individual restaurants.

Most restaurant-level changes in ads viewed by Black teens from 2012 to 2019 were also consistent with declines in ads viewed by teens overall. Black teens' ad exposure decreased across all restaurants that had advertising in 2012 except Dunkin', Panera Bread, and Chick-fil-A. Notably, Black teens viewed 54% more Dunkin' ads in 2019 than in 2012, compared to a 17% decline in ads viewed by all youth.

Relative exposure to fast-food TV ads by Black versus White youth also varied widely by restaurant. Disparities were lowest for Chick-fil-A, with comparable numbers of ads viewed by Black and White preschoolers (targeted ratio:1.09), children

vi. Checkers/Rally's, Hardee's, Jack In The Box, Carl's Jr., and Culver's are not reported. They advertised on spot TV only so Black and White youth exposure are not available for these restaurants.



@Deej\_Manuel freestyled about the \$5 Popeyes Shrimp Tackle Box.



Black children and/or teens saw 90% more ads for Popeyes, Papa John's, and Burger King compared to White youth.

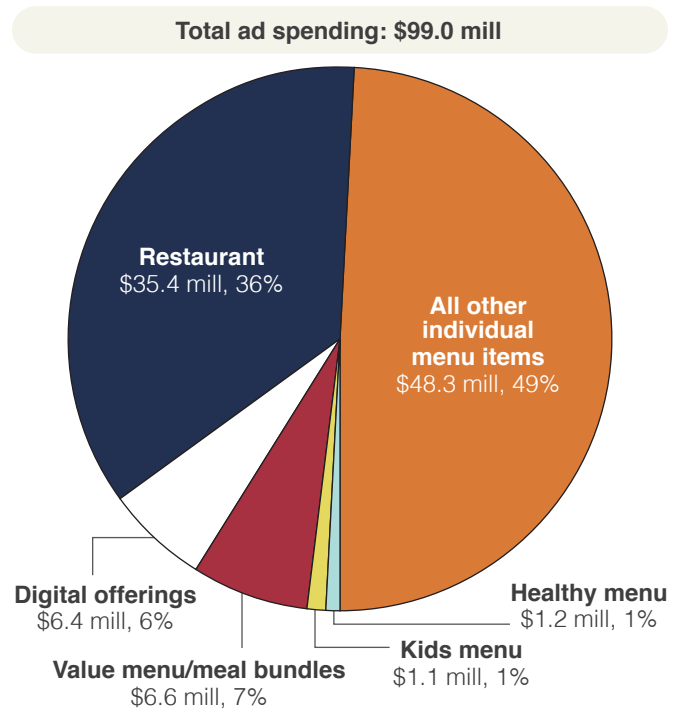
(1.16), and teens (1.02). Arby's, Dairy Queen, and Starbucks also had targeted ratios of 1.45 or less for Black versus White children and teens.

In contrast, disparities in exposure by preschoolers and/or children were 90% or higher for six restaurants (Burger King, Domino's, Popeyes, Papa John's, Cicis Pizza, and Zaxby's). Among teens, disparities in exposure exceeded 90% for four restaurants (McDonald's, Popeyes, Papa John's, and Cicis Pizza).

### Products targeted to Black youth

The proportion of ad dollars allocated to product types on Black-targeted TV were similar to those on all national TV, with a few exceptions (see **Figure 14**). Value menus/meal bundles represented a somewhat higher proportion of Black-targeted TV spending (7% vs. 6% on all national TV), as did digital offerings (6% vs. 5%). Other regular menu items were also advertised relatively more on Black-targeted TV (49% vs. 48%), while restaurant-level ads represented a lower proportion of Black-targeted TV spending (36% vs. 39%). Healthy menus and kids' menus each represented just 1% of total spending on Black-targeted and all national TV channels.

Figure 14. Black-targeted TV ad spending by product type: 2019



Source: Analysis of 2019 Nielsen data

Products with disproportionately high ratios of ads viewed by Black children and/or teens included soft drinks, Happy Meals, burgers, Cheesy Bacon Fries, coffee, and restaurant-level ads from McDonald's (see **Appendix Table 6**). Black children and teens also saw approximately twice as many ads for Burger King's Crispy Taco, Cheesy Tots, and breakfast items. Menu items from Papa John's, Popeyes, and Wendy's, as well as PizzaHut.com, also appeared on this list.

## Key findings: Advertising targeted to Hispanic and Black youth

### Spanish-language TV advertising

- In 2019, 16 fast-food restaurants spent \$318 million to advertise on Spanish-language TV, an increase of 33% over 2012.
- A few restaurants allocated a higher-than-average proportion of their TV ad spending to Spanish language TV, including McDonald's (10%), Subway (16%), Wendy's (14%), Chick-fil-A (18%), and Cicis Pizza (37%), compared to 9% on average.
- Overall, there was a slight increase in number of Spanish-language TV ads viewed by Hispanic preschoolers (+2%) and children (+7%) from 2012 to 2019 and a small decline for Hispanic teens (-3%), in contrast to large decreases in fast-food ads viewed by preschoolers, children, and teens in total.
- McDonald's was responsible for more than 15% of Spanish-language TV ads viewed by Hispanic youth on Spanish-language TV, while Domino's, Subway, and Wendy's were responsible for another 33%.
- The number of ads viewed by Hispanic youth on Spanish-language TV increased for most restaurants across all age groups in 2019, including increases of 150% or more for Taco Bell, Papa John's, Cicis Pizza, and Little Caesars.
- McDonald's, Burger King, and Popeyes were the only restaurants to decrease ads viewed by Hispanic youth on Spanish-language TV between 2012 and 2019.
- Restaurants devoted 10% of spending on Spanish-language TV to value menus/meal bundles, compared to 6% of total advertising spending, but there were no healthy menu items advertised on Spanish-language TV in 2019. McDonald's Happy Meals were the only kids' meals advertised on Spanish-language TV (1% of total spending), but they were primarily targeted to adults.

### Advertising targeting Black youth

- In 2019, 23 fast-food restaurants spent \$99 million to advertise on Black-targeted TV, averaging 3% of their national TV ad budgets. Domino's ranked first in ad spending on Black-targeted TV, followed by McDonald's, Burger King, and Taco Bell.
- Popeye's, Captain D's, and Cicis Pizza dedicated a higher proportion of their national TV ad spending to Black-targeted TV (7-12%), compared to 3% for all restaurants on average.
- In 2019, Black preschoolers, children, and teens viewed approximately 75% more fast-food ads on all TV than their White peers, which was an increase compared to 60% more ads viewed by Black youth in 2012.
- Although the number of fast-food TV ads viewed by Black youth in all age groups declined from 2012 to 2019 (-30% for preschoolers and children and -56% for teens), these declines were lower than expected given substantial decreases in average TV viewing times during the same period (-45% and -64%, respectively).
- McDonald's, Burger King, Domino's, and Taco Bell were responsible for 46% to 47% of all fast-food ads viewed by Black youth, a somewhat higher percentage compared to fast-food ads viewed by all youth.
- From 2012 to 2019, ad exposure by Black preschoolers and children increased for nine of the top restaurants, including Domino's (+12%), Taco Bell (+4%), Sonic (+44%), Little Caesars (+23%), Popeye's (+16%), Dairy Queen (+4%), Dunkin' (+191%), Panera Bread (+884%), and Chick-fil-A (+165%).
- Healthy menu items and kids' meals each represented just 1% of total spending on Black-targeted TV, comparable to the proportion spent on all TV. However, value menu/meal bundles and digital represented a somewhat higher proportion of ad spending on Black-targeted TV (7% vs. 6%).
- McDonald's, Burger King, Papa John's, Popeye's, Wendy's and Pizza Hut targeted ads for some menu items to Black youth, including soft drinks, snacks, burgers, french fries, pizza, and kids' meals. Black youth saw at least twice as many ads for these menu items compared to White youth.



**Total fast-food advertising spending has increased since 2012, a small number of restaurants were responsible for most fast-food advertising, and many restaurants continued to disproportionately target advertising to children and to Hispanic and Black youth. These analyses found little evidence that fast-food restaurants have begun to advertise healthier options or improve advertising aimed at youth.**

In this report, we document 2019 advertising spending and TV advertising exposure in total and for the top fast-food advertisers. We examine advertising targeted to children under 12 and to Hispanic and Black youth, and evaluate changes from 2012 documented in our previous Fast Food FACTS report. These results help answer key questions regarding fast-food restaurants' progress in implementing responsible marketing practices and encouraging more nutritious choices.

## Trends in fast-food advertising to youth

### How much did fast-food restaurants spend on advertising in 2019? How has fast-food advertising changed since 2012?

In 2019, 274 fast-food restaurants spent \$5 billion in total advertising, a 9% increase versus 2012. TV represented 91% of total advertising spending, and TV advertising spending increased by 12% compared to 2012. Advertising spending on digital media increased by 74% from 2012 to 2019 (\$119 mill) but represented just 2% of the total.

### How many TV ads did young people see and what products were advertised to them?

Preschoolers (2-5 years) viewed on average 830.0 TV ads for fast food (2.3 ads-per-day) in 2019, children (6-11 years) viewed 786.5 ads, and teens (12-17 years) viewed 774.5 ads. Ads viewed by all age groups declined from 2012 to 2019 (-19%, -33%, and -56%, respectively), but these declines were lower than expected given even greater reductions in average TV viewing times during the same period (-44%, -51%, and -62%, respectively).

Individual menu items (excluding special menus) represented approximately one-half (50-53%) of TV ads viewed by all age groups, and general restaurant ads contributed another 29% to 30%. Ads for kids' meals were highly targeted to preschoolers and children, but they accounted for only 8% and 10% of fast-food TV ads viewed by these age groups. Value menus and

meal bundles represented another 6% to 7% of ads viewed, while healthy menu items were featured in just 1% of TV ads viewed by all youth. Ads for digital products (including mobile apps and websites) accounted for approximately 4% of ads viewed.

### How much of children's exposure to fast-food advertising occurred on children's TV channels?

Fifteen of the top-27 fast-food advertisers appeared on children's TV in 2019, allocating on average 0.6% of their total TV advertising spending to these channels. However, only 10% of fast-food ads viewed by preschoolers and 11% of ads viewed by children appeared on children's TV channels. These ads promoted individual menu items and the restaurant in general, as well as kids' meals. Most ads appeared on Nickelodeon (66% and 56% of ads viewed by preschoolers and children on children's TV) and/or Cartoon Network (22% and 29% of ads viewed). A small number of ads appeared on preschool networks.

### How much fast-food advertising appeared on Spanish-language TV in 2019, and how many ads did Hispanic youth see?

In 2019, 15 fast-food restaurants spent \$318 million to advertise on Spanish-language TV, a 33% increase from 2012. Spanish-language ads accounted for on average 9% of their TV advertising budgets. There was also an increase in fast-food TV ads viewed by Hispanic preschoolers (+2%) and children (+7%) and a small decline for Hispanic teens (-3%), in contrast to large declines in fast-food ads viewed on TV in total.

Restaurants devoted 10% of Spanish-language TV advertising spending to value menus/meal bundles, compared to 6% of their total advertising, and healthy menu items were not advertised on Spanish-language TV in 2019. McDonald's Happy Meals were the only kids' meals advertised on Spanish-language TV (1% of total spending), and they were primarily targeted to adults.

### How much fast-food advertising was targeted to Black youth in 2019, including advertising on Black-targeted TV channels and disproportionate advertising to Black versus White youth?

In 2019, 23 fast-food restaurants spent \$99 million to advertise on Black-targeted TV, where they allocated on average 3% of their national TV ad budgets.

On all TV programming in 2019, Black preschoolers, children, and teens viewed approximately 75% more fast-food ads



than their White peers, which was an increase compared to 60% more ads viewed by Black youth in 2012. Although the number of fast-food TV ads viewed by Black youth in all age groups declined from 2012 to 2019 (-30% for preschoolers and children and -56% for teens), these declines were lower than expected given greater decreases in average TV viewing times during the same period (-45% and -64%, respectively).

Comparable to the proportion of ad spending on all TV, individual menu items represented 49% of spending on Black-targeted TV and general restaurant ads represented 36%, while healthy menu items and kids' meals each represented just 1%. However, value menu/meal bundles and digital offerings contributed a higher proportion of ad spending on Black-targeted TV (7% and 6%, respectively).

**Which fast-food restaurants were responsible for the most advertising in 2019? How did advertising differ between restaurants?**

Six companies were responsible for 65% of all fast-food advertising spending. These companies – McDonald's, Yum!

Brands (Taco Bell, Pizza Hut, KFC), Roark Capital Group (Sonic), Restaurant Brands Intl (Burger King, Popeyes), Domino's Pizza, and Doctor's Associates (Subway) – spent \$3.3 billion in advertising combined. Out of 274 fast-food restaurants with advertising in 2019, the top-27 advertisers were responsible for 92% of all fast-food ad spending.

Twelve restaurants appeared on the list of top-10 restaurants with the highest advertising spending and/or TV advertisements viewed by children or teens (see **Table 15**). These same restaurants also frequently ranked among the top-10 restaurants with advertising targeted to children and to Hispanic and Black youth. McDonald's remained the top fast-food advertiser in 2019, followed by Domino's for ads viewed by preschoolers and children, and Burger King for ads viewed by teens. Additional restaurants on the top-10 total advertising lists included Taco Bell, Wendy's, Sonic, KFC, Pizza Hut, and Little Caesars, as well as smaller restaurants with disproportionately high advertising on children's, Spanish-language, and/or Black-targeted TV channels. Summaries of findings for individual restaurants and companies are detailed in **Appendix: Restaurant results summary**.

**Table 15.** Top-10 restaurants ranked by amount of advertising and the most targeted advertising: 2019\*

Company	Restaurant	Corporate responsibility pledges		Total Ad spending	TV ads viewed		Children's TV	Spanish-language TV		Black-targeted TV	
		Children <sup>a</sup>	Nutrition		Ad spending (6-11 y)	Teens (12-17 y)	Ad spending	Ad spending	Ads viewed <sup>b</sup>	Ad spending	Black-targeted ratio <sup>c</sup>
McDonald's Corp	McDonald's	✓	✓	1	1	1	1	1	1	2	2
Domino's Pizza	Domino's	✓	✓	2	2	3	13	2	2	1	8
Yum! Brands	Taco Bell	✓	✓	3	4	4	11	5	5	4	
Restaurant Brands Intl	Burger King	✓	✓	4	3	2	n/a	8	9	3	5
Doctor's Associates	Subway	✓	✓	5	8	11	4	3	3	11	9
Wendy's	Wendy's		✓	6	10	9	15	4	4	5	10
Roark Capital Group	Sonic			7	5	5	3	10	7	10	
Yum! Brands	KFC	✓	✓	8	9	7	n/a	7	8	9	
Yum! Brands	Pizza Hut	✓	✓	9	7	8	9	11	10	8	
Dunkin' Brands	Dunkin'		✓	10	15	15	14	13	14	15	
Little Caesars Enterprise	Little Caesars			11	6	6	12	9	6	6	
Restaurant Brands Intl	Popeyes		✓	14	11	10	n/a	12	11	7	4
Additional top-10 restaurants							**	***			****

\*Includes restaurants that ranked in the top-10 for total ad spending and/or TV ads viewed by children or teens

\*\*Jimmy John's (2); Cicis Pizza (5); Chick-fil-A (6); Papa John's (7); Chipotle (8); Arby's (10)

\*\*\* Chick-fil-A (6)

\*\*\*\*Cicis Pizza (1); Papa John's (3); Zaxby's (6); Jimmy John's (7)

<sup>a</sup> Includes marketing to children and/or kids' meal nutrition; <sup>b</sup> Children (6-11y); <sup>c</sup> Teens (12-17 y)

## Implications

In summary, fast-food restaurants have not noticeably improved their advertising to children or to Hispanic or Black youth. Most restaurants increased their advertising spending from 2012 and 2019, with even greater increases in Spanish-language TV ad spending. Although exposure to TV ads declined for all youth age groups, these declines were less than expected given substantial reductions in time spent watching TV, especially by children and teens. Moreover, many restaurants continued to advertise directly to children under 12 on children's TV channels, including on preschool TV.

Despite restaurants' pledges to introduce healthier menu items, most fast-food TV ads viewed by children and teens promoted individual regular menu items or the restaurant in general. Restaurants devoted four to six times as much advertising to value menus/meal bundles and digital offerings (mobile apps and websites) than to healthy menus, and they spent a higher proportion of their Spanish-language and Black-targeted TV advertising on value menus/meal bundles. McDonald's was the only restaurant to allocate more than 1% of its ad spending to promote kids' meals.

These findings have implications for public health advocacy and policy actions to address the negative impact of fast-food consumption on young people's diets and health.

- Nearly all fast-food advertising to youth and targeted advertising was driven by a small number of companies and restaurants. These same restaurants ranked among the top-50 in fast-food sales.
- Most of these companies have promised to introduce more nutritious menu choices, use higher quality ingredients, and/or increase nutrition transparency. However, restaurants continued to almost exclusively advertise individual regular menu items, which are primarily high in calories, sodium, sugar, and/or fat.<sup>1</sup> We found little evidence that restaurants actively promoted their more nutritious menu items to youth or adult consumers.
- Industry self-regulation of advertising directed to children through the Children's Food & Beverage Advertising Initiative (CFBAI) has major limitations. McDonald's was the only CFBAI participant to advertise on children's TV in 2019. Although it only advertised Happy Meals that met CFBAI nutrition standards, these ads promote child visits to the restaurant, where most purchases are for nutritionally poor menu items.<sup>2-4</sup> Moreover, these ads are highly efficient. Happy Meal ads represented just 3% of McDonald's TV ad budget in 2019, but more than 50% of McDonald's ads viewed by preschoolers and children.

- Demonstrating another limitation of voluntary industry self-regulation, including CFBAI, non-participating restaurants continued to advertise primarily individual menu items (not kids' meals) directly to children on children's and preschool TV channels.
- Efforts to address young people's fast-food consumption and advertising to children must extend beyond children's TV and kids' meals. Nine out of 10 fast-food ads that children saw appeared on other (not children's) TV programming and promoted other products (not kids' meals).
- TV viewing by teens has declined dramatically, by 62% from 2012 to 2019, which has reduced fast-food restaurants' ability to reach this age group with TV advertising. As a result, the efficiency of TV fast-food advertising appears to be declining for teens (but not children or Black youth). However, extensive fast-food marketing on social media, influencer marketing, product placements, sponsorships, and other newer forms of marketing disproportionately reach and appeal to children and teens.<sup>5-7</sup>
- Increasing spending on fast-food advertising targeted to Hispanic and Black youth, including disproportionate promotion of inexpensive high-calorie meal deals and value menu items, raises concerns given greater fast-food consumption by Black and Hispanic adolescents.<sup>8</sup> These youth also face greater risks for obesity and other diet-related diseases.<sup>9</sup>
- Many of the restaurants with the most targeted marketing also publicized corporate responsibility initiatives to introduce more nutritious options. Some also publicly support the Black Lives Matter movement and racial justice, diversity, and inclusion.<sup>10</sup> However, we did not identify any promises by restaurants to improve marketing practices aimed at communities of color.

## Recommendations

Despite over a decade of promises to improve fast-food advertising to children and introduce more nutritious products, the findings in this report demonstrate that fast-food restaurants have not noticeably reduced the vast amount of advertising for nutritionally poor products aimed at children and teens and targeted to communities of color. Media companies, policymakers, public health practitioners, and advocates also play an integral role in promoting policies and encouraging other actions to address harmful industry practices that contribute to high fast-food consumption by young people and negatively impact their health.

## Industry

Current *food industry* voluntary pledges promise to introduce healthier menu items and advertise healthier products to children. Our findings show additional opportunities for fast-food companies to improve advertising aimed at children and teens, and especially Hispanic and Black youth.

- Strengthen CFBAI food industry self-regulation of advertising to children.
  - › CFBAI pledges by participating companies, including McDonald's and Burger King, should be expanded to limit unhealthy advertising to children up to 14 years, at a minimum.<sup>11</sup>
  - › Additional fast-food restaurants should join the CFBAI and discontinue advertising regular menu items on children's and preschooler TV channels.
  - › CFBAI should also address loopholes that allow participating companies to depict products that meet CFBAI nutrition standards in their child-directed advertising (such as McDonald's Happy Meals), while continuing to offer unhealthy versions of those products (including sugary fountain drinks with Happy Meals) inside restaurants, a common brand marketing strategy.<sup>12,13</sup>
- Fast-food restaurants should ensure that healthier kids' meal beverage default policies extend to digital ordering apps.<sup>14</sup> These policies should also require healthier sides and main dishes with all kids' meals.
- Corporate responsibility initiatives, such as promises to introduce healthier menu items, higher quality ingredients, and/or increase nutrition transparency, should also include a commitment to advertise and promote their more nutritious menu items to consumers and to substantially reduce promotion of nutritionally poor products.
- Fast-food restaurants' support of racial justice and equity should include commitments to discontinue disproportionately high marketing of unhealthy products that contribute to diet-related diseases – such as high-calorie meal deals and value menu items – to Hispanic and Black youth.

*Media companies* also have an important role to play to ensure that food advertising on their programming do not harm young people's health.

- Following the lead of Disney,<sup>15</sup> other preschool and children's TV networks (e.g., Viacom and Turner Broadcasting) and third-party websites visited by large numbers of children should set minimum nutrition standards for food advertising that they will accept.

- Media companies should establish similar requirements for food advertising on Spanish-language and Black-targeted TV programming, especially programming aimed at youth.
- Current food and beverage advertising restrictions on YouTube Kids<sup>16</sup> should be evaluated by independent researchers and expanded to cover product placement of branded fast-food products and promoted by child influencers.

## Policymakers

Federal, state, and local government policy actions should also address fast-food advertising to children and teens and the negative impact of fast-food consumption on young people's diets and health.

- Policymakers should enact policies that require nutrition standards for the entire kids' meal, including main dishes and sides, in addition to healthier beverage default policies.<sup>17</sup> They should also include clear language on policy implementation and compliance monitoring.<sup>18</sup>
- Local governments should limit fast-food promotion and availability for children and teens in neighborhoods, including zoning restrictions for fast-food restaurants located near youth-oriented settings such as schools and parks and signage in store windows.<sup>19</sup>
- The U.S. federal government should eliminate unhealthy food and beverage marketing to children as a tax-deductible corporate expense.<sup>20</sup>
- The U.S. Federal Trade Commission should publish an updated report on food marketing expenditures aimed at children and adolescents (previously published in 2008 and 2012) to document the full range of targeted marketing to children and adolescents of color and digital food and beverage marketing to youth in the U.S.<sup>21</sup>

## Public health advocates

Public health advocates and practitioners play an important role in raising awareness of harmful fast-food advertising practices and encouraging industry and policymakers to enact improvements.

- Advocates should encourage policymakers to pursue federal, state, and local government actions that effectively improve the nutrition quality of fast-food consumed by children and teens.<sup>22</sup>
- Grassroots and other advocacy groups should develop campaigns to publicize the vast amounts of primarily unhealthy fast-food advertising, especially advertising that

disproportionately targets children, teens, and communities of color.<sup>23</sup>

- Advocates should support youth-led countermarketing campaigns to expose marketing practices by the top fast-food advertisers.<sup>24</sup>
- Advocates can influence corporate behavior by organizing shareholder actions and participating in shareholder meetings to demand that corporate leadership address problematic marketing practices that contribute to diet-related health inequities.<sup>25</sup>

### Conclusion

Fast-food advertising is a powerful commercial determinant of health.<sup>26</sup> As demonstrated in this report, fast-food restaurants use numerous advertising strategies, including targeting children and youth of color, to promote nutritionally poor products and encourage choices that negatively impact young people's health and equitable health outcomes. Fast-food restaurants must do much more than introduce healthier options on their menus and limit sugary drinks in kids' meals to address the negative impact of fast-food advertising on young people's diets and health. Media companies, policymakers, and the public health community can play an important role and demand more responsible advertising, including significant reductions in unhealthy fast-food advertising aimed at children, teens, and youth of color.



## Executive Summary

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## Results

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# Ranking Table 1

## Advertising spending

Ranking by total advertising spending in 2019\*

Includes total spending in all measured media for the 27 fast-food restaurants that ranked in the top-25 in advertising spending in 2019 and/or targeted their advertising to children, Hispanic, and/or Black consumers

Most

Least

Rank	Company	Restaurant	Total advertising spending (\$ mill)			2019 advertising spending by medium (\$ mill)				
			2012	2019	Change	TV	TV % of total	Outdoor	Radio	Digital
1	McDonald's Corp	McDonald's	\$971.8	\$776.8	-20%	\$633.7	82%	\$70.7	\$33.0	\$39.3
2	Domino's Pizza	Domino's	\$191.1	\$441.6	131%	\$432.3	98%	\$4.5	\$3.5	\$1.2
3	Yum! Brands	Taco Bell	\$274.7	\$377.5	37%	\$350.1	93%	\$0.9	\$19.0	\$3.3
4	Restaurant Brands Intl	Burger King	\$236.4	\$348.8	48%	\$345.1	99%	\$2.1	\$0.2	\$1.3
5	Doctor's Associates	Subway	\$595.3	\$250.5	-58%	\$209.5	84%	\$9.4	\$19.1	\$11.5
6	Wendy's	Wendy's	\$274.5	\$247.0	-10%	\$218.9	89%	\$4.1	\$16.2	\$7.3
7	Roark Capital Group	Sonic	\$173.7	\$207.2	19%	\$203.1	98%	\$1.3	\$0.4	\$2.4
8	Yum! Brands	KFC	\$258.1	\$200.5	-22%	\$187.7	94%	\$0.7	\$4.8	\$6.4
9	Yum! Brands	Pizza Hut	\$245.8	\$194.6	-21%	\$187.0	96%	\$0.3	\$0.9	\$6.3
10	Dunkin' Brands	Dunkin'	\$135.1	\$186.6	38%	\$158.9	85%	\$14.1	\$8.5	\$5.0
11	Little Caesars Enterprise	Little Caesars	\$88.5	\$174.7	98%	\$169.0	97%	\$1.5	\$3.8	\$0.3
12	Roark Capital Group	Arby's	\$137.8	\$173.6	26%	\$169.0	97%	\$1.2	\$2.4	\$1.0
13	Papa John's Intl	Papa John's	\$153.3	\$148.8	-3%	\$140.9	95%	\$0.3	\$1.0	\$5.6
14	Restaurant Brands Intl	Popeyes	\$68.8	\$122.2	78%	\$119.9	98%	\$0.8	\$1.1	\$0.1
15	Chick-fil-A	Chick-fil-A	\$29.9	\$119.4	299%	\$99.9	84%	\$8.8	\$2.6	\$5.9
16	Berkshire Hathaway	Dairy Queen	\$75.8	\$105.4	39%	\$98.1	93%	\$1.4	\$5.3	\$0.6
17	Jack In The Box	Jack In The Box	\$103.7	\$80.3	-23%	\$73.7	92%	\$2.7	\$1.9	\$2.0
18	Roark Capital Group	Carl's Jr.	\$62.5	\$70.5	13%	\$63.1	89%	\$4.4	\$2.4	\$0.2
19	Chipotle Mexican Grill	Chipotle	\$1.9	\$69.4	3613%	\$62.7	90%	\$3.2	\$0.2	\$2.2
20	JAB Holding Company	Panera Bread	\$37.3	\$67.7	81%	\$53.9	80%	\$8.1	\$3.9	\$1.7
21	Starbucks Corp	Starbucks	\$44.3	\$66.6	50%	\$54.5	82%	\$0.5	\$0.0	\$6.3
22	Roark Capital Group	Hardee's	\$40.7	\$45.2	11%	\$38.8	86%	\$4.6	\$0.9	\$0.9
23	Zaxby's Franchising	Zaxby's	**	\$44.6		\$42.0	94%	\$1.5	\$0.1	\$1.0
24	Oak Hill Capital Partners	Checkers/Rally's	\$35.3	\$42.9	21%	\$41.6	97%	\$0.5	\$0.0	\$0.7
25	Culver Franchising System	Culver's	\$13.9	\$41.4	198%	\$36.0	87%	\$3.1	\$2.2	\$0.1
26	Roark Capital Group	Jimmy John's	**	\$38.7		\$34.3	89%	\$2.3	\$0.0	\$2.1
27	Cicis Enterprise	Cicis Pizza	\$14.5	\$21.9	51%	\$21.3	98%	\$0.3	\$0.0	\$0.2
		All other restaurants (n=247)	\$366.3	\$382.5	4%	\$321.2	84%	\$32.1	\$20.3	\$4.5

\*Includes spending in 18 different media including television, magazine, internet, radio, newspaper, freestanding insert coupons, and outdoor advertising

\*\*Restaurant did not advertise in 2012

Source: Nielsen (2012, 2019)

## Ranking Table 2

# TV advertising exposure by preschoolers and children

Ranking by ads viewed by children (6-11 years) in 2019

Includes average number of ads viewed by children on national (network, cable, and syndicated) and local (spot) TV

Rank	Company	Restaurant	Average # of ads viewed						Targeted ratios*	
			Preschoolers (2-5 years)			Children (6-11 years)			Preschoolers	Children
			2012	2019	Change	2012	2019	Change	2019	2019
1	McDonald's Corp	McDonald's	265.6	123.1	-54%	316.9	128.9	-59%	<b>0.71</b>	<b>0.74</b>
2	Domino's Pizza	Domino's	60.4	82.7	37%	71.5	78.2	9%	0.43	0.40
3	Restaurant Brands Intl	Burger King	79.8	77.6	-3%	95.3	72.7	-24%	0.36	0.34
4	Yum! Brands	Taco Bell	52.6	68.3	30%	61.2	61.4	0%	0.40	0.36
5	Roark Capital Group	Sonic	31.8	56.2	77%	39.1	53.6	37%	0.46	0.43
6	Little Caesars Enterprise	Little Caesars	33.3	40.8	22%	33.8	38.8	15%	0.39	0.37
7	Yum! Brands	Pizza Hut	64.2	34.3	-47%	69.7	31.8	-54%	0.45	0.42
8	Doctor's Associates	Subway	106.5	33.5	-69%	131.1	31.8	-76%	0.50	0.48
9	Yum! Brands	KFC	45.5	34.3	-25%	48.9	31.3	-36%	0.38	0.35
10	Wendy's	Wendy's	59.2	32.9	-44%	68.2	30.8	-55%	0.39	0.37
11	Restaurant Brands Intl	Popeyes	21.4	33.1	55%	26.5	30.2	14%	0.45	0.41
12	Berkshire Hathaway	Dairy Queen	23.9	32.9	38%	28.6	29.2	2%	0.45	0.40
13	Roark Capital Group	Arby's	25.7	27.2	6%	30.7	26.7	-13%	0.39	0.38
14	Papa John's Intl	Papa John's	28.2	22.5	-20%	28.6	20.5	-28%	0.40	0.37
15	Dunkin' Brands	Dunkin'	13.5	19.9	48%	14.2	19.6	37%	0.41	0.40
16	Roark Capital Group	Jimmy John's	**	14.0		**	11.2		<b>0.77</b>	<b>0.62</b>
17	Cicis Enterprise	Cicis Pizza	18.3	11.2	-39%	10.6	10.0	-6%	<b>0.67</b>	<b>0.60</b>
18	JAB Holding Company	Panera Bread	2.2	10.1	356%	2.3	9.2	296%	0.35	0.32
19	Chipotle Mexican Grill	Chipotle	**	9.0		**	8.5		0.39	0.37
20	Chick-fil-A	Chick-fil-A	3.6	8.2	126%	3.2	7.3	128%	0.48	0.43
21	Starbucks Corp	Starbucks	3.9	7.4	89%	4.3	6.4	50%	0.41	0.35
22	Jack In The Box	Jack In The Box	6.9	5.9	-15%	7.3	5.4	-25%	0.47	0.43
23	Zaxby's Franchising	Zaxby's	**	4.3		**	3.9		0.38	0.35
24	Roark Capital Group	Carl's Jr.	7.9	3.7	-53%	9.4	3.9	-59%	0.39	0.41
25	Roark Capital Group	Hardee's	3.6	3.4	-4%	4.5	3.5	-22%	0.33	0.34
26	Oak Hill Capital Partners	Checkers/Rally's	4.0	3.1	-22%	4.4	3.4	-22%	0.34	0.36
27	Culver Franchising System	Culver's	0.7	1.3	90%	0.8	1.2	56%	0.36	0.34
		All other restaurants	60.5	29.2	-52%	64.0	27.0	-58%	0.40	0.37

\*Ratio of ads viewed compared to adults (18-49 years)

\*\*Restaurant did not advertise on television in 2012

**Bolded** ratio indicates higher than average targeted ratios; approaching or exceeding TV viewing time ratios of preschoolers (0.86) and children (0.63) vs. adults

Source: Nielsen (2012, 2019)

## Ranking Table 3

### TV advertising exposure by teens

Ranking by ads viewed by teens (12-17 years) in 2019

Includes average number of ads viewed by teens on national (network, cable, and syndicated) and local (spot) TV

Rank	Company	Restaurant	Average # of ads viewed			Teen-targeted ratio*
			2012	Teens (12-17 years) 2019	Change	2019
1	McDonald's Corp	McDonald's	272.3	95.1	-65%	<b>0.55</b>
2	Restaurant Brands Intl	Burger King	151.2	82.7	-45%	0.39
3	Domino's Pizza	Domino's	97.2	77.4	-20%	0.40
4	Yum! Brands	Taco Bell	141.3	68.0	-52%	0.40
5	Roark Capital Group	Sonic	79.6	53.5	-33%	<b>0.43</b>
6	Little Caesars Enterprise	Little Caesars	52.9	40.9	-23%	0.39
7	Yum! Brands	KFC	97.1	36.1	-63%	0.40
8	Yum! Brands	Pizza Hut	137.9	33.9	-75%	<b>0.45</b>
9	Wendy's	Wendy's	119.9	33.2	-72%	0.40
10	Restaurant Brands Intl	Popeyes	45.3	31.9	-30%	<b>0.44</b>
11	Doctor's Associates	Subway	205.0	30.3	-85%	<b>0.45</b>
12	Berkshire Hathaway	Dairy Queen	51.8	28.3	-45%	0.39
13	Roark Capital Group	Arby's	56.4	27.7	-51%	0.39
14	Papa John's Intl	Papa John's	46.9	21.7	-54%	0.39
15	Dunkin' Brands	Dunkin'	23.9	19.8	-17%	0.40
16	Chipotle Mexican Grill	Chipotle	**	9.3		0.41
17	JAB Holding Company	Panera Bread	3.4	9.0	164%	0.32
18	Chick-fil-A	Chick-fil-A	3.2	6.3	97%	0.37
19	Cicis Enterprise	Cicis Pizza	16.3	9.0	-45%	<b>0.53</b>
20	Roark Capital Group	Jimmy John's	**	8.2		<b>0.45</b>
21	Starbucks Corp	Starbucks	9.7	6.3	-36%	0.34
22	Jack In The Box	Jack In The Box	9.0	4.7	-48%	0.37
23	Zaxby's Franchising	Zaxby's	**	4.1		0.36
24	Roark Capital Group	Carl's Jr.	14.6	3.5	-76%	0.37
25	Roark Capital Group	Hardee's	7.5	3.5	-54%	0.34
26	Oak Hill Capital Partners	Checkers/Rally's	6.1	3.3	-46%	0.36
27	Culver Franchising System	Culver's	1.1	1.2	10%	0.34
		All other restaurants	100.0	25.5	-74%	0.35

\*Compared to adults (18-49 years)

\*\*Restaurant did not advertise on television in 2012

**Bolded** ratio indicates higher than average targeted ratios; approaching or exceeding TV viewing time ratios of teens vs. adults (0.46)

Source: Nielsen (2012, 2019)



## Ranking Table 4

### Spanish-language TV advertising exposure

Ranking by ads viewed by Hispanic children (6-11 years) in 2019

Includes average number of TV ads viewed by Hispanic preschoolers, children, and teens for all restaurants with Spanish-language advertising in 2019

Most  
↓  
Least

Rank	Company	Restaurant	Average # of ads viewed								
			Hispanic preschoolers (2-5 years)			Hispanic children (6-11 years)			Hispanic teens (12-17 years)		
			2012	2019	Change	2012	2019	Change	2012	2019	Change
1	McDonald's Corp	McDonald's	87.8	53.7	-39%	62.3	38.2	-39%	56.0	32.3	-42%
2	Domino's Pizza	Domino's	35.7	40.4	13%	24.8	28.7	16%	22.5	23.3	3%
3	Doctor's Associates	Subway	33.6	35.5	6%	25.0	28.3	13%	27.4	23.6	-14%
4	Wendy's	Wendy's	27.8	36.2	30%	20.7	25.7	24%	20.0	22.0	10%
5	Yum! Brands	Taco Bell	1.5	24.7	1512%	1.3	17.6	1302%	1.2	14.6	1150%
6	Little Caesars Enterprise	Little Caesars	8.1	20.1	147%	5.7	16.1	184%	4.5	13.8	210%
7	Roark Capital Group	Sonic	21.3	21.4	0%	14.5	15.7	8%	11.6	13.7	18%
8	Yum! Brands	KFC	18.5	18.8	2%	12.8	14.3	12%	10.8	11.9	10%
9	Restaurant Brands Intl	Burger King	61.0	19.0	-69%	41.6	13.8	-67%	38.7	11.9	-69%
10	Yum! Brands	Pizza Hut	18.8	18.6	-1%	12.0	13.6	13%	10.2	11.3	11%
11	Restaurant Brands Intl	Popeyes	19.1	11.4	-40%	12.9	8.8	-32%	11.8	7.0	-41%
12	Cicis Enterprise	Cicis Pizza	1.7	11.4	571%	1.1	8.1	615%	0.9	6.9	676%
13	Chick-fil-A	Chick-fil-A	**	10.8		**	7.9		**	6.5	
14	Dunkin' Brands	Dunkin'	**	10.5		**	7.5		**	6.0	
15	Papa John's Intl	Papa John's	1.0	9.6	870%	0.8	7.1	802%	0.8	5.5	577%

\*\*Restaurant did not advertise on Spanish-language TV in 2012

Source: Nielsen (2012, 2019)

## Exposure to TV advertising by Black preschoolers and children

Ranking by ads viewed by Black children (6-11 years) in 2019

Includes average number of ads viewed by Black preschoolers and children on national (network, cable, and syndicated) TV\*

Most

Least

Rank	Company	Restaurant	Average # of ads viewed by Black children				Black-targeted ratios***	
			2012	2019		2019		
			Children (2-11 years)	Preschoolers (2-5 years)	Children (6-11 years)	Change****	Preschoolers	Children
1	McDonald's Corp	McDonald's	385.1	157.6	170.1	-57%	<b>1.74</b>	<b>1.83</b>
2	Restaurant Brands Intl	Burger King	137.0	113.0	107.0	-20%	<b>1.88</b>	<b>1.90</b>
3	Domino's Pizza	Domino's	97.7	112.0	106.6	12%	<b>1.90</b>	<b>1.90</b>
4	Yum! Brands	Taco Bell	84.2	91.6	84.2	4%	<b>1.66</b>	<b>1.69</b>
5	Roark Capital Group	Sonic	49.1	69.3	72.4	44%	<b>1.67</b>	<b>1.85</b>
6	Little Caesars Enterprise	Little Caesars	46.2	58.1	55.2	23%	<b>1.77</b>	<b>1.79</b>
7	Wendy's	Wendy's	93.5	47.2	43.9	-51%	<b>1.84</b>	<b>1.81</b>
8	Yum! Brands	KFC	68.8	47.8	43.8	-33%	<b>1.79</b>	<b>1.79</b>
9	Restaurant Brands Intl	Popeyes	36.4	43.4	40.9	16%	<b>1.86</b>	<b>1.93</b>
10	Yum! Brands	Pizza Hut	97.3	41.8	39.6	-58%	<b>1.67</b>	<b>1.69</b>
11	Doctor's Associates	Subway	154.8	40.3	39.4	-74%	<b>1.60</b>	<b>1.69</b>
12	Berkshire Hathaway	Dairy Queen	34.2	37.5	33.8	4%	1.31	1.35
13	Roark Capital Group	Arby's	28.8	29.2	27.6	-1%	<b>1.51</b>	1.45
14	Papa John's Intl	Papa John's	35.4	28.4	25.6	-24%	<b>2.18</b>	<b>2.14</b>
15	Dunkin' Brands	Dunkin'	6.6	19.5	19.1	191%	<b>1.53</b>	1.55
16	Cicis Enterprise	CiCis Pizza	18.4	18.9	17.9	0%	<b>1.95</b>	<b>2.26</b>
17	Roark Capital Group	Jimmy John's	**	15.3	13.4		<b>1.41</b>	<b>1.63</b>
18	JAB Holding Company	Panera Bread	1.4	14.9	13.3	884%	<b>1.73</b>	<b>1.68</b>
19	Chipotle Mexican Grill	Chipotle	**	12.1	10.9		<b>1.78</b>	1.61
20	Sentinal Capital Partners	Captain D's	**	8.3	7.7		<b>1.92</b>	<b>1.85</b>
21	Chick-fil-A	Chick-fil-A	2.6	7.3	6.7	165%	1.09	1.16
22	Starbucks Corp	Starbucks	7.9	6.4	6.2	-20%	1.19	1.33
23	Zaxby's Franchising	Zaxby's	**	3.0	2.8		<b>1.89</b>	<b>2.16</b>
		All other restaurants	54.8	6.2	5.7	-89%	1.37	1.41

\*Does not include advertising on spot TV. Checkers/Rally's, Hardee's, Jack In The Box, Carl's Jr., and Culver's advertised on spot TV only

\*\*Restaurant did not advertise on national TV in 2012

\*\*\*Ratio of ads viewed by Black preschoolers or children vs. White preschoolers or children

\*\*\*\*Calculated based on average of ads viewed by preschoolers and children in 2019

**Bolded** ratio indicates a targeted ratio higher than the ratio of TV viewing time for Black preschoolers and children compared to White preschoolers (1.32) or children (1.61)

Source: Nielsen (2012, 2019)

## Ranking Table 6

### Exposure to TV advertising by Black teens

Ranked by ads viewed by Black teens (12-17 years) in 2019

Includes average number of ads viewed by Black teens on national (network, cable, and syndicated) TV\*

Rank	Company	Restaurant	Average # of ads viewed by Black teens (12-17 years)			Black-targeted ratio***	
			2012	2019	Change	2012	2019
1	McDonald's Corp	McDonald's	381.5	133.5	-65%	1.71	<b>2.08</b>
2	Restaurant Brands Intl	Burger King	231.3	121.1	-48%	1.75	<b>1.87</b>
3	Domino's Pizza	Domino's	148.8	103.0	-31%	1.78	<b>1.79</b>
4	Yum! Brands	Taco Bell	191.9	91.5	-52%	1.59	<b>1.65</b>
5	Roark Capital Group	Sonic	103.1	69.1	-33%	1.57	<b>1.75</b>
6	Little Caesars Enterprise	Little Caesars	76.0	56.4	-26%	1.53	<b>1.70</b>
7	Yum! Brands	KFC	133.5	50.3	-62%	1.49	<b>1.75</b>
8	Wendy's	Wendy's	177.1	46.7	-74%	1.75	<b>1.77</b>
9	Restaurant Brands Intl	Popeyes	64.9	44.7	-31%	1.81	<b>1.98</b>
10	Yum! Brands	Pizza Hut	194.6	43.3	-78%	1.52	<b>1.70</b>
11	Doctor's Associates	Subway	260.2	39.9	-85%	1.49	<b>1.77</b>
12	Berkshire Hathaway	Dairy Queen	64.8	32.9	-49%	1.32	1.34
13	Roark Capital Group	Arby's	58.0	28.8	-50%	1.30	1.41
14	Papa John's Intl	Papa John's	61.6	27.0	-56%	1.80	<b>1.98</b>
15	Dunkin' Brands	Dunkin'	13.2	20.4	54%	1.22	<b>1.64</b>
16	Cicis Enterprise	Cicis Pizza	24.4	17.0	-30%	1.60	<b>2.48</b>
17	JAB Holding Company	Panera Bread	2.2	12.4	456%	0.99	1.55
18	Chipotle Mexican Grill	Chipotle	**	11.7			<b>1.63</b>
19	Roark Capital Group	Jimmy John's	**	11.1			<b>1.82</b>
20	Sentinal Capital Partners	Captain D's	**	7.0			<b>1.70</b>
21	Starbucks Corp	Starbucks	17.5	6.1	-65%	2.03	1.31
22	Chick-fil-A	Chick-fil-A	3.2	5.2	62%	1.24	1.02
23	Zaxby's Franchising	Zaxby's	**	2.9			<b>1.83</b>
		All other restaurants	94.2	5.0	-95%	1.39	1.20

\*Does not include advertising on spot TV. Checkers/Rally's, Hardee's, Jack In The Box, Carl's Jr., and Culver's advertised on spot TV only

\*\*Restaurant did not advertise on national TV in 2012

\*\*\*Ratio of ads viewed by Black teens vs. White teens

**Bolded** ratio indicates a targeted ratio higher than the ratio of TV viewing time for Black teens compared to White teens (1.58)

Source: Nielsen (2012, 2019)

Most

Least

## Corporate responsibility statements

Company	Restaurant(s)	Corporate statement
<i>Statements about kids' meals</i>		
McDonald's Corp	McDonald's	"Parents are looking for menu choices that they can feel good about feeding their kids, and that's why we're focused on evolving the Happy Meal and making balanced meals more accessible to families across the globe. McDonald's will continue to take a responsible approach to our Happy Meals by offering balanced options and promoting menu items that contribute to recommended food groups, such as fruits, vegetables and low-fat dairy." <sup>11</sup>
Doctor's Associates	Subway	"The Subway brand recognizes the importance of providing children with a well-balanced meal that includes a variety of food groups. 100% of Subway children's meals meet nutritional criteria that are consistent with USDA Dietary Guidelines for Americans. The Subway Fresh Fit for Kids meal includes a low-saturated fat mini sub on 9-Grain Wheat, topped with all the fresh vegetables, sliced apples for a side and milk or Honest Kids Fruit Punch for a beverage." <sup>12</sup>
Restaurant Brands Intl	Burger King	"[We] remain committed to ensuring we advertise menu items that provide families with nutritionally balanced options suitable for even our youngest guests." <sup>13</sup>
<i>Statements about marketing to kids</i>		
McDonald's Corp	McDonald's	"We're proud of our long heritage of taking marketing to children seriously and responsibly, and we actively participate in self-regulation programs focused on this important issue... That's why we participate in a number of local, regional and global pledges, such as the EU Pledge and the U.S. Children's Food & Beverage Advertising Initiative. Our global policies are guided by these pledges as well as our own Global Marketing to Children Guidelines, which apply to all of our markets around the world." <sup>14</sup>
Yum! Brands	Taco Bell, KFC, Pizza Hut	"[We] limit marketing communications to children under 12... Yum! Brands follows U.S. and international guidelines to avoid marketing to children." <sup>15</sup>
Domino's Pizza	Domino's	"In our industry there is increased concern about marketing to children. Domino's does not, and will never, market to children. Nor do we feature children in our advertising, whether it be broadcast or non-broadcast as part of our media policy. This includes the use of marketing techniques that appeal to children such as games and toys." <sup>16</sup>
Restaurant Brands Intl	Burger King	"As an original member of the U.S. Children's Food & Beverage Advertising Initiative and European Union (EU Pledge) programs, Burger King Corporation and participating European affiliates in those territories only advertise meals and products to children under the age of 12 that meet established uniform nutritional criteria for calories, saturated fat, sodium and added sugar. The U.S. and EU pledge programs have annual reporting requirements and cover a broad array of advertising and media platforms such as TV, radio, print, online and mobile (including company-owned websites and social media profiles), and product placement." <sup>17</sup>
<i>Other nutrition-related statements</i>		
Restaurant Brands Intl	Popeyes	"At Popeyes, we're starting by removing colors, flavors, and preservatives from artificial sources from our core chicken menu items in the US by 2022, and have updated our recipes in two other countries." <sup>18</sup>
Restaurant Brands Intl	Burger King	"At Burger King in the US, the Whopper sandwich and 90% of the permanent food menu are now free of colors, flavors, and preservatives from artificial sources, and we're striving to reach 100% by the end of 2021." <sup>19</sup>
Restaurant Brands Intl	Burger King, Popeyes	"We are committed to providing our guests with a variety of menu options and the information they need to make informed choices, while continuously improving the nutrient profile of our existing food lineup. We are working to expand our sodium reduction initiatives and set forward-looking targets to reduce the presence of other nutrients of concern, including fat and sugar." <sup>10</sup>
Yum! Brands	Taco Bell, KFC, Pizza Hut	"[We] offer lower-calorie menu options across main dishes, combos and sides, consistent with Yum!'s global nutrition standards that align with the World Health Organization and the Dietary Guidelines for Americans, to continue to improve our food's nutrition. By 2030, we intend to represent 50% of menu food offerings to be consistent with Yum! global nutrition criteria for meal options." <sup>11</sup>
Doctor's Associates	Subway	"Subway Restaurants believe in providing complete and accurate nutrition and dietary information so that our guests can make informed choices." <sup>12</sup>



## Corporate responsibility statements continued

Company	Restaurant(s)	Corporate statement
<i>Other nutrition-related statements (continued)</i>		
Wendy's	Wendy's	"At Wendy's, it's not only about offering craveable menu items, but also using high-quality ingredients. Our fruits and veggies are from world-class suppliers; we say no to artificial ingredients, flavorings and preservatives whenever possible; and we use ingredients you'd find in your own fridge or pantry." <sup>13</sup>
Dunkin' Brands	Dunkin'	"Dunkin' and Baskin-Robbins have successfully eliminated artificial dyes from key categories on their menu." "Dunkin' Brands 2018 Sustainability Report Goals: Expand our vegetarian and vegan offerings on both DD/BR menus by 2020." <sup>14</sup>
Domino's Pizza	Domino's	"We believe in being transparent with our customers to help them with their food choices. This includes providing all relevant information relating to nutritionals, allergens and additives clearly on our website to help customers choose food that fits into their lifestyles." <sup>15</sup>
Chick-fil-A	Chick-fil-A	"We believe in serving delicious, better-for-you fast food. By offering a variety of wholesome options, we're working toward a menu that is more healthy and sustainable, without ever sacrificing taste or quality." <sup>16</sup>
Papa John's Intl	Papa John's	"Papa John's has always believed in BETTER INGREDIENTS. BETTER PIZZA. Serving high-quality pizza made with authentic ingredients." "Papa John's offers detailed nutritional information online, for many items, including the ingredients of most of our products." <sup>17</sup>
Chipotle Mexican Grill	Chipotle	"Being real means... making food fresh every day. No artificial flavors, colors, or preservatives. No microwaves, freezers or can openers... we only use 53 ingredients you can pronounce." <sup>18</sup>
Inspire Brands (formerly Roark Capital Group)	Arby's, Sonic, Jimmy John's	"Our brands also follow all applicable FDA guidelines related to antibiotic use. This includes the judicious use of antibiotics, under the supervision of a veterinarian, to prevent or treat illness in the animals." "Inspire has committed to finalizing 100% sourcing of cage-free eggs by 2025, with phased implementation timing for Sonic related to volume of eggs used. Arby's completed its transition to serving only cage-free eggs by 2020. Eggs are not served at, nor sourced for, Buffalo Wild Wings nor Jimmy John's." "Inspire ensures all ingredients are in compliance with regulatory standards, including artificial colors. We have removed artificial colors in some products and continue to evaluate the feasibility of potential replacements for artificial colors in other products." <sup>19</sup>
JAB Holding Company	Panera Bread	2017-2019 Commitments and Accomplishments: "[We] shared our aspiration to expand plant-based offerings to 50% of our entrees, including a new offering in every menu category by the end of 2021 • Expanded our array of whole grain breads, providing more options than any other national restaurant chain • Launched a new line of moderate to no-added sugar self-serve beverages and disclosed amount of added sugar at beverage stations • Launched a new product category with our Baja and Mediterranean Grain Bowls, a plant-forward offering • Began labeling whole grain content on all bread items containing more than 51% whole grain" <sup>20</sup>
<i>Addressing hunger</i>		
Roark Capital Group	Arby's	"Nationally, we partner with Share Our Strength's No Kid Hungry campaign. As a Core Partner of the No Kid Hungry campaign, the highest delineation for a partner, we work with them on all levels to take a strategic approach to ending childhood hunger by funding long-term innovative programs and sustainable solutions that impact the issue of childhood hunger." "Our School's Out, Food's In (SOFI) program is designed to support children who struggle to find meals during the summer when they no longer have access to free or reduced price school lunches. Each year, before the last day of school, Arby's partners with local school systems to provide students with a SOFI meal card, providing 10 free Arby's Kids meals for each student during the summer." <sup>21</sup>
Chick-fil-A	Chick-fil-A	"At Chick-fil-A, we strive to take great care of our communities. And, while there are countless ways to make an impact, we know that a nourishing meal is a critical need for millions of people. That's why we created Chick-fil-A Shared Table, a program to help Chick-fil-A Operators fight hunger in their local communities by donating surplus food to local soup kitchens, shelters and nonprofits to food those in need." <sup>22</sup>
Jack in the Box	Jack in the Box	"Jack in the Box partners with No Kid Hungry to ensure children have access to three healthy meals a day." <sup>23</sup>

Source: Rudd Center analysis of corporate responsibility statements posted on company websites (March, 2021)

## Appendix Table 1

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## Special menus offered by restaurant: 2020

Restaurant	Value menu	Meal bundles	Kids' menu	Healthy menu
McDonald's	\$1\$2\$3 Dollar Menu	40-piece Chicken McNuggets; Classic Packs	Happy Meal	
Burger King	Value Meal Deals	Family Bundles	King JR	Salads & Veggies
Domino's				Salads
Taco Bell	Value Menu	Groups (Party Packs)		Power Menu
Sonic	Everyday Deals		Wacky Pack Kid's Meals	
Little Caesars*				
KFC		Bucket Meals	Kids' Meals	
Pizza Hut	Deals	Deals (Dinner Boxes & Bundles)		
Wendy's	Biggie Deals	Meals Deals; Feed the Fam Deals	Wendy's Kids' Meal	Fresh-Made Salads
Popeyes		Family Feasts; Family Meals	Kids Meals	
Subway			Fresh Fit for Kids	Fresh Fit; Salads
Dairy Queen		2 for \$4 Super Snack; \$6 Meal Deal	Kids' Meals	Salads
Arby's	Everyday Value		Kids Menu	Market Fresh
Papa John's*				
Dunkin**				
Chipotle			Kid's Meal	Lifestyle Bowl; Salad
Panera Bread	Value Duets	Family Feast Value Meals	Panera Kids	Salads; Plant Based
Chick-fil-A			Kid's Meal	Salads
Cicis Pizza		Value Packs		Salad Bar & Sides
Jimmy John's		JJ's Combos!	Little Johns	
Starbucks*				
Jack In The Box			Kid's	Chicken & Salads (salads only)
Zaxby's		Zax Family Packs	Zax Kidz	Big Zalads
Carl's Jr.	\$2.99 Charbroiled Double Deals		StarPals Kids Meals	
Hardee's	\$2, 3, More		StarPals Kids Meals	
Checkers/Rally's		Family Bundles		
Culver's	Value Baskets		Kids' Meals	Fresh Salads; Mindful Choices

\*These restaurants did not offer any special menus

Source: Rudd Center analysis of restaurant websites (Oct-Dec 2020)

## Ad spending by special menu type and top-five advertised menu items by restaurant: 2019

Restaurant	Ad spending in 2019 (\$ mill)							Top-five menu items*
	Total	Value menu		Healthy menu		Kids' menu		
		Spending	% of total	Spending	% of total	Spending	% of total	
McDonald's	\$776.8	\$55.6	7%	\$4.0	1%	\$26.3	3%	Coffee (\$42.1), Spicy BBQ Glazed Tenders (\$32.8), McFlurry (\$32.8), Happy Meal (\$26.1), Big Mac Bacon (\$24.4)
Domino's	\$441.6							
Taco Bell	\$377.5	\$105.2	28%					\$5 Box (\$69.3), Nacho Fries (\$40.1), Grande Burritos (\$33.4), Taco Party Pack (\$32.5), Steak Rattlesnake Fries (\$22.4)
Burger King	\$348.8					\$0.3	<1%	Impossible Whopper (\$79.7), Chicken Nuggets (\$41.8), Crispy Taco (\$14.6), Pretzel Bacon King (\$14.3), Cheesy Tots (\$14.3)
Subway	\$250.5	\$0.0	<1%	\$2.1	1%	\$0.1	<1%	Sliders (\$37.2), Sweet N Smoky Steak & Guac (\$16.2), Steak Club (\$16.0), Italian Ciabatta (\$12.3), Meatball Marinara (\$12.0)
Wendy's	\$247.0	\$25.4	10%	\$10.7	4%	\$0.2	<1%	Spicy Chicken Nuggets (\$33.1), Biggie Bag (\$23.3), Frosty (\$11.5), Peppercorn Mushroom Melt (\$10.9)
Sonic	\$207.2	\$18.4	9%			\$0.2	<1%	Misc Beverage (\$29.5), Carhop Classic (\$18.4), Brunch Burger (\$13.7), Jr Garlic Butter Bacon Burger (\$13.4), Ice Cream Cone (\$12.7)
KFC	\$200.5	\$60.2	30%					\$20 Fill Up (\$31.5), Chicken & Waffles Basket (\$27.5), \$5 Fill-up Box (\$24.1), Buffalo Wings (\$19.5), Famous Bowls (\$16.0)
Pizza Hut	\$194.6	\$0.9	<1%					Pzone (\$34.0), Stuffed Garlic Knots Pizza (\$12.8)
Dunkin'	\$186.6							Signature Latte/Blueberry Crisp (\$13.1), Iced Coffee/Cold Brew (\$11.8), Latte (\$10.6)
Little Caesars	\$174.7							ExtraMostBestest (\$28.1), Pretzel Crust Pizza (\$22.4), 5 Meat Feast (\$20.2), Quattro Pizza (\$18.3), ExtraMostBestest Stuffed Crust (\$17.2)
Arby's	\$173.6			\$10.5	6%			Bourbon BBQ Chicken (\$19.5), Fish Sandwich (\$17.8), Beer Braised Beef (\$12.7), Gyro (\$12.7), Petite Filet Steak Sandwiches (\$12.5)
Papa John's	\$148.8							Garlic Parmesan Crust Pizza (\$22.5), Philly Cheesesteak Pizza (\$13.1), XL Superhero Pizza (\$12.2)
Popeyes	\$122.2	\$0.5	<1%					Chicken Sandwich (\$13.3)
Chick-fil-A	\$119.4							Grilled Nuggets (\$19.2)
Dairy Queen	\$105.4	\$0.1	<1%					Blizzard (\$33.4), Chicken Strip Basket (\$13.4), Chicken & Waffles Basket (\$12.1)
Jack In The Box	\$80.3							Combo Meal (\$27.9)
Carl's Jr.	\$70.5	\$6.2	9%			\$0.0	<1%	Guacamole Double Cheeseburger (\$15.3)
Chipotle	\$69.4							Carne Asada (\$11.5)
Panera Bread	\$67.7			\$20.3	30%			Baja Grain Bowl (\$14.7)



## Ad spending by special menu type and top-five advertised menu items by restaurant: 2019 continued

Restaurant	Ad spending in 2019 (\$ mill)						Top-five menu items*	
	Total	Value menu		Healthy menu		Kids' menu		
		Spending	% of total	Spending	% of total	Spending		% of total
Starbucks	\$66.6						Peppermint Mocha (\$25.4), Coffee/Cold Brew/Nitro (\$14.0)	
Hardee's	\$45.2	\$0.5	1%					
Zaxby's	\$44.6			\$12.1	27%			
Checkers/Rally's	\$42.9							
Culver's	\$41.4			\$6.0	15%			

\*Lists menu items with the most ad spending >\$10 mill (up to five) menu items with the most ad spending >\$10 mill

Shading indicates higher-than-average spending on these menu types

Source: Analysis of 2019 Nielsen data

## Products advertised most often to preschoolers and children on children's TV: 2019

Restaurant	Product type	Children's TV		Preschoolers (2-5 years)		Children (6-11 years)		Advertised products	Child networks*
		Ad spending (\$'000)	% of TV ad spending	Avg # of ads viewed	Preschooler: adult targeted ratio	Avg # of ads viewed	Child: adult targeted ratio		
McDonald's	Kids' meal	\$14,322.1	60%	62.4	3.96	70.2	4.45	Happy Meal	DXD, Nick, Nktns, Toons
Subway	Individual menu items	\$517.0	<1%	3.9	4.34	3.9	4.28	Southwest Chicken Club, Steak Club	Nick, Toons
Jimmy John's	Restaurant	\$641.0	3%	3.3	4.49	2.7	3.61	Restaurant	Nick, Nktns, Toons
Jimmy John's	Individual menu items	\$220.9	59%	2.5	4.93	2.3	4.44	Frenchie	Nick, Toons
Cicis Pizza	Restaurant	\$263.0	1%	2.9	6.12	1.9	3.99	Restaurant	Nick, <b>NickJr</b> , Nktns
Sonic	Individual menu items	\$444.4	<1%	2.3	6.15	1.4	3.61	Bacon Mac & Cheese Bites, Biggie Cheese, Carhop Classic, Ched R Peppers, Fritos Chili Cheese Jr Wrap, Jr Garlic Butter Bacon Burger, Ore O A La Mode, Patty Melt, Sonic Blast, Summertime BLT	Nick
Jimmy John's	Kids' meal	\$525.0	4%	2.1	5.20	1.1	2.74	Little John	Nick, Toons
Chipotle	Restaurant	\$96.7	<1%	0.7	3.00	0.9	3.95	Restaurant	Toons
Chick-fil-A	Restaurant	\$178.0	<1%	0.9	5.52	0.6	3.77	Restaurant	Nick
Pizza Hut	Restaurant	\$22.8	<1%	0.3	2.98	0.4	4.11	Restaurant	Toons, <b>Ukids</b>
Sonic	Restaurant	\$88.9	1%	0.6	6.32	0.3	3.63	Restaurant	Nick
McDonald's	Restaurant	\$15.4	<1%	0.2	3.65	0.3	6.16	Restaurant	DXD, Nktns
Sonic	Kids' meal	\$161.7	100%	0.4	5.39	0.3	4.20	Wacky Pack Kid's Meal	Nick
Papa John's	Restaurant	\$107.8	<1%	0.3	3.15	0.3	3.42	Restaurant	Toons
Papa John's	Individual menu items	\$49.6	<1%	0.2	3.44	0.3	4.42	Extra Cheesy Alfredo Pizza, Garlic Parmesan Crust Pizza, Meats Pizza, Works Pizza	Toons
Pizza Hut	Individual menu items	\$22.5	<1%	0.2	3.88	0.3	4.08	Cheesy Bites Pizza, Pzone, Buffalo Wings, Stuffed Garlic Knots Pizza, Ultimate Cheesy Crust Pizza	Nick, <b>NickJr</b> , Nktns, Toons, <b>Ukids</b>
McDonald's	Individual menu items	\$30.0	<1%	<0.1	3.97	0.1	5.34	Bacon Barbeque Burger, McFlurry	Nick

\*Child network abbreviations: DXD (Disney XD), Nick (Nickelodeon), Nktns (Nicktoons), Toons (Cartoon Network)

**Bold** indicates preschool-targeted networks: NickJr (Nick Jr.), Ukids (Universal Kids)

Shading indicates ads for kids' meals

Source: Analysis of 2019 Nielsen data

## Top products advertised on Spanish-language TV

Restaurant	Product type	Spanish-language TV				Most advertised products*
		Ad spending (\$000)	Avg # of ads viewed			
			Hispanic preschoolers (2-5 y)	Hispanic children (6-11 y)	Hispanic teens (12-17 y)	
Domino's	Restaurant	\$27,293.4	31.3	21.9	18.1	
Subway	Lunch/dinner main dish	\$26,088.8	28.0	22.0	18.2	Meatball Marinara, Southwest Chicken Club, Sweet n' Smokey Steak & Guac
McDonald's	Restaurant	\$29,400.0	24.2	16.2	14.2	
Little Caesars	Pizza	\$12,231.0	15.9	12.4	10.9	Pretzel Crust Pizza, Five Meat Feast, Thin Crust Pizza
McDonald's	Lunch/dinner main dish	\$21,249.4	15.0	12.3	10.1	Bacon Barbecue Burger, Big Mac Bacon, Grand McExtreme Bacon Burger
Taco Bell	Combo	\$14,409.1	13.8	10.4	8.7	\$5 Box, Nacho Fries Box, Taco Party Pack
Pizza Hut	Restaurant	\$8,593.5	13.5	9.8	8.3	
Wendy's	Restaurant	\$10,627.9	12.5	8.7	7.2	
Wendy's	Combo	\$9,154.8	10.8	7.9	6.6	Biggie Bag
KFC	Combo	\$8,115.3	10.0	7.3	6.0	\$20 Fill-up, \$5 Fill-up, Chicken & Waffles
Wendy's	Lunch/dinner main dish	\$8,500.7	9.0	6.6	6.1	Giant Jr. Bacon Cheeseburger, Spicy Chicken Nuggets
Burger King	Lunch/dinner main dish	\$8,246.3	8.8	6.8	6.0	Chicken Nuggets, Impossible Whopper
Sonic	Lunch/dinner main dish	\$5,751.9	8.1	6.3	5.6	BLT Sandwich, Brunch Burger, Jr. Garlic Butter Bacon Burger
Popeyes	Restaurant	\$6,690.3	8.1	6.0	4.8	
Dunkin'	Coffee	\$5,895.0	7.9	5.7	4.6	Coffee, Coffee Signature Latte/Blueberry Crisp, Iced Coffee
Domino's	Digital	\$6,812.5	7.7	5.9	4.5	Mobile app, Dominos.com
Papa John's	Pizza	\$5,922.3	7.3	5.2	4.2	Meatball & Pepperoni Pizza, Philly Cheesesteak Pizza, XL Superhero Pizza
Subway	Snack	\$7,448.0	7.3	6.1	5.2	Sliders
Chick-fil-A	Restaurant	\$10,206.2	6.4	4.9	3.9	
Taco Bell	Restaurant	\$5,262.0	6.3	4.1	3.1	

\*Top-three advertised products determined by number of ads viewed by Hispanic youth (all age groups)

Source: Analysis of 2019 Nielsen data

## Top products with ads targeted to Black youth: 2019\*

Restaurant	Product type	Black children (6-11 y)		Black teens (12-17 y)		Menu items promoted
		Avg # ads viewed	Targeted ratio**	Avg # ads viewed	Targeted ratio**	
McDonald's	Misc drink	6.2	2.37	6.5	2.24	Soft drink
McDonald's	Kids' meal	97.2	1.64	58.3	2.21	Happy Meal
Burger King	Snack	9.6	2.26	9.8	2.11	Crispy Taco
Papa John's	Pizza	17.5	2.27	18.6	2.11	Philly Cheesesteak Pizza, Ultimate Pepperoni Pizza, Superhero Pizza
Popeyes	Combo	11.7	1.99	12.7	2.07	Butterfly Shrimp Tackle Box, Combo meals
Wendy's	Sweets	2.4	2.03	2.7	2.06	Frosty
McDonald's	Lunch/dinner main dish	16.8	2.34	16.9	2.05	Big Mac Bacon, Quarter Pounder, Spicy BBQ Glazed Tenders
Pizza Hut	Digital	2.3	1.94	2.6	2.01	PizzaHut.com
Burger King	Breakfast	4.9	2.06	5.4	1.99	Double Croissanwich, French Toast Sandwich
McDonald's	Restaurant	36.1	2.07	38.3	1.96	
McDonald's	Snack	2.8	2.29	2.9	1.95	Cheesy Bacon Fries
McDonald's	Coffee	5.0	2.24	5.0	1.94	Coffee
Burger King	Lunch/dinner side	3.8	2.01	4.3	1.88	Cheesy Tots

\*Includes product types for which Black children and/or teens viewed on average >2.0 TV ads in 2019

\*\*Ratio of ads viewed by Black vs. White children or teens

Source: Analysis of 2019 Nielsen data



## SUMMARY RESULTS BY RESTAURANT COMPANY

The top fast-food advertisers (27 restaurants) were responsible for 92% of all advertising spending and 96% to 97% of youth exposure to TV advertising in 2019. However, this report highlights considerable differences between restaurants, including advertising targeted to children, teens, and Hispanic and Black youth, and changes in advertising compared to 2012. Descriptions of social media marketing by individual restaurants are detailed in [Fast Food FACTS 2021: Social Media Supplement](#).

### McDonald's Corp



McDonald's was responsible for 16% of all fast-food ad spending (\$777 million), 15% and 16% of fast-food TV ads viewed by preschoolers and children in 2019, and 12% of ads viewed by teens. From 2012 to 2019, the restaurant greatly reduced its ad spending (by 20%), and ads viewed by preschoolers, children, and teens declined (by 54-65%). McDonald's was the only CFBAI-participating fast-food restaurant to advertise its kids' meals, which comprised only 3% of its TV ad spending but more than 50% of McDonald's TV ads viewed by preschoolers and children. On children's TV channels, the restaurant was responsible for the majority of fast-food ad spending (81%), and ads viewed by preschoolers (75%) and children (81%). McDonald's was also the only restaurant to advertise on Disney XD, which is the only children's TV network to set nutrition standards for foods that can be advertised.

In addition, McDonald's ranked first in advertising spending on Spanish-language TV, was responsible for more than 15% of ads viewed by Hispanic youth, and invested a higher-than-average proportion of its TV ad spending to Spanish language TV (10%). However, McDonald's was one of just three restaurants that reduced its advertising spending on Spanish-language TV from 2012 to 2019 (-13%), and Hispanic youth exposure to McDonald's ads declined by approximately 40%. In contrast, McDonald's increased its advertising spending on Black-targeted TV by 57% from 2017 to 2019, where it ranked second in ad spending. McDonald's also had the second highest targeted ratios of ads viewed by Black versus White youth, with Black youth viewing at least twice as many ads for McDonald's soft drinks, Happy Meals, burgers, Cheesy Bacon Fries, coffee, and the restaurant in general.

### Domino's Pizza



**Domino's**

On nearly all advertising measures, Domino's ranked second behind McDonald's. The restaurant spent \$442 million in total advertising in 2019, an increase of 131% versus 2012 and the largest increase among the top-10 restaurants. Domino's spent only \$2,000 to advertise on children's TV in 2019, but preschoolers' and children's total exposure to Domino's ads (on all TV programming) increased by 37% and 9%, respectively, from 2012 to 2019. Domino's also allocated 27% of its advertising budget (>\$120 mill) to promote its mobile app and

Dominos.com website for online ordering.

In addition, Domino's ranked second in advertising on Spanish-language TV, and exposure to Domino's ads increased for all Hispanic youth age groups (ranging from +3% for teens to +16% for children). Domino's ranked first in ad spending on Black-targeted TV, where it increased spending by 31% from 2017 to 2019. Domino's was also one of four top-10 restaurants with an increase in TV ad exposure by Black preschoolers and children from 2012 to 2019 (+12%), although it ranked eighth in targeted ratios of exposure by Black versus White youth.

### Yum! Brands



Three Yum! Brands restaurants appeared on the top-10 restaurant rankings (Taco Bell, KFC, and Pizza Hut). Taco Bell ranked among the top-four restaurants in total ad spending and ads viewed by all youth age groups. From 2012 to 2019, Taco Bell also increased its ad spending by 37%, and ads viewed by preschoolers increased by 30%, while ads viewed by children did

not change. In contrast, ad spending declined for KFC (-22%) and Pizza Hut (-21%), and Pizza Hut had one of the largest declines in ads viewed by preschoolers and children (-47% and -54%). TV ads viewed by teens also declined by 50% or more for Taco Bell, KFC, and Pizza Hut. Pizza Hut ranked ninth in ad spending on children's TV channels, and Taco Bell ranked number-11. Pizza Hut also advertised on preschool TV networks (NickJr and UKids), although neither restaurant offers kids' meals.

Furthermore, Taco Bell increased its ad spending on Spanish-language TV by more than 2000% from 2012 to 2019, climbing from number-12 to number-5, with comparable increases in ads viewed by Hispanic preschoolers (+1500%), children (+1300%), and teens (+1150%). Taco Bell ranked fourth in ad spending on Black-targeted TV in 2019, and KFC increased its Black-targeted TV ad spending by 35% from 2017 to 2019. Compared to White teens, Black teens saw twice as many ads for PizzaHut.com promoting online ordering.

### Restaurant Brands Intl



Burger King ranked fourth in ad spending, third in ads viewed by preschoolers and children, and second in ads viewed by teens. Its total advertising spending increased by 48% from 2012 to 2019 (to \$349 mill), with lower-than-average declines in ad exposure (-3% for preschoolers, -24% for children, and -45% for teens). Burger King was also notable for spending the most to advertise one menu item: \$80 million on its Impossible Whopper meatless burger. Although

Burger King participates in the CFBAI, it did not advertise its kids' meals or advertise on children's TV in 2019.

Burger King ranked a relatively low eighth and ninth in Spanish-language TV ad spending and ads viewed by Hispanic youth and was one of the few restaurants to reduce its Spanish-language ad spending from 2012 to 2019 (-54%). However, Burger King increased its ad spending on Black-targeted TV by 8% from 2017 to 2019, and Black youth saw more than twice as many ads for Burger King's Crispy Taco, Cheesy Tots, and breakfast items compared to White youth.

Popeyes ranked tenth in ads viewed by preschoolers and teens in 2019 but did not rank in the top-10 for ads viewed by children or total ad spending. It was one of two restaurants (together with Burger King) with reductions in ads viewed by Hispanic youth on Spanish-language TV from 2012 to 2019. In contrast, Popeyes had one of the highest increases in ad spending from 2012 to 2019 (+78%), and its ads were highly targeted to Black youth. Popeyes dedicated a higher-than-average proportion of its ad budget to Black-targeted TV (7%) and ranked seventh in ad spending on those channels. In 2019, Black teens saw 1.98 times as many Popeyes ads compared to White teens (ranked #4), and from 2012 to 2019 exposure to Popeyes ads increased by 16% for Black preschoolers and children.

### Doctor's Associates



Subway advertising was notable for some of the largest reductions in ad spending (-58%) and ads viewed by preschoolers, children, and teens (-69%, -76%, and -85%) from 2012 to 2019. However, Subway ranked fourth in ad spending on children's TV, where it only advertised regular menu items,

including Southwest Chicken and Steak Club sandwiches. Subway was also one of the top advertisers on Spanish-language TV, where it ranked third in ad spending, and invested a relatively high proportion of its TV ad budget (16%). It increased Spanish-language ad spending by 44% from 2012 to 2019. It also ranked third in ads viewed by Hispanic youth. Subway advertised at a relatively low level on Black-targeted TV, although the restaurant ranked among the top-10 for targeted ratios of ads viewed by Black versus White teens.

### Wendy's



Similar to Subway, Wendy's reduced its traditional advertising from 2012 to 2019, but appeared to increase its focus on targeted advertising. Wendy's total ad spending declined by 10%, and overall youth exposure to TV ads declined by 44% (preschoolers) to 72% (teens). The restaurant spent just \$1000 to advertise on children's TV. However, Wendy's ranked fourth in ad spending on Spanish-language TV and ads viewed by Hispanic children. Moreover, from 2012 to 2019, Wendy's Spanish-language TV ad spending more than doubled, and the restaurant dedicated a higher-than-average proportion of its TV ad spending to Spanish-language TV (14%). Wendy's also ranked fifth in ad spending on Black-targeted TV, although it reduced its Black-targeted ad spending by 16% from 2017 to 2019. Black youth saw more than twice as many ads for its Frosty dessert compared to White youth.

## Roark Capital Group



Roark Capital Group owned five of the top fast-food advertisers in 2019, but only Sonic ranked among the top-10 restaurants in total advertising spending (#7) or ads viewed by youth (#5). Sonic increased its ad spending by 19% from 2012 to 2019, and it had the highest increases in ads viewed

by preschoolers (+77%) and children (+37%) overall, and by Black preschoolers and children (+44%), among the top-10 restaurants. Sonic also ranked third in ad spending on children's TV, where it primarily advertised regular menu items (e.g., Bacon Mac & Cheese Bites, Fritos Chili Cheese Jr Wrap) and ice cream (e.g., Sonic Blast, Oreo A La Mode). Sonic ranked seventh in advertising to Hispanic youth on Spanish-language TV, with moderate increases in ads viewed by Hispanic children (+8%) and teens (+18%), while ads viewed by Hispanic preschoolers did not change.

Two smaller Roark Capital Group restaurants also appeared on the top-10 targeted advertising lists: Jimmy John's (#2 in ad spending on children's TV and #7 in ads viewed by Black vs. White teens) and Arby's (#10 in ad spending on children's TV). Jimmy John's also allocated the highest proportion of its ad budget (4%) to children's TV channels, where it advertised regular menu items, as well as kids' meals. Sonic was the only Roark Capital Group restaurant to advertise on Spanish-language TV.

## Little Caesars Enterprise



Although Little Caesars ranked number-11 in total ad spending, it ranked sixth in ads viewed by youth. Little Caesars also allocated 18% of its ad spending to promote its mobile app and website for online ordering (only Domino's spent more). Exposure to Little Caesars ads increased for both preschoolers (+22%) and children (+15%) from 2012 to 2019. The restaurant was one of two that advertised on preschool networks (NickJr and UKids). Little

Caesars also ranked sixth in ads viewed by Hispanic youth on Spanish-language TV and had among the highest increases in ads viewed by Hispanic preschoolers (+147%), children (+184%), and teens (+210%). On Black-targeted TV, Little Caesars was one of five restaurants that increased their ad spending (+33%) from 2017 to 2019.

## Additional restaurants with targeted advertising in 2019



Four additional restaurants ranked among those with the most advertising on children's TV: Cicis Pizza, Chick-fil-A, Papa John's, and Chipotle. Cicis Pizza also advertised on preschool TV channels. However, these restaurants did not rank among the top-10 restaurants in total ad spending or total TV ads viewed by children.

On Spanish-language TV, Chick-fil-A ranked sixth in total ad spending and was the only top-10 Spanish-language advertiser that did not rank in the top-10 for total ad spending

and/or youth exposure. Chick-fil-A and Cicis Pizza allocated a higher-than-average proportion of their TV ad spending to Spanish-language TV (18% and 37%, respectively). Two pizza restaurants – Papa John's and Cicis Pizza – had increases of 150% or more in the number of ads viewed by Hispanic youth on Spanish-language TV from 2012 to 2019.

Cicis Pizza and Captain D's dedicated a higher-than-average proportion of their national TV ad spending to Black-targeted TV channels (12% and 9%, respectively). Restaurants with the highest ratios of total ads viewed by Black versus White youth included Cicis Pizza, Papa John's, and Zaxby's.

**We used syndicated advertising data from Nielsen Global Media to evaluate fast-food advertising in the United States in 2019. Whenever possible, we used the same methods as our previous report, “Fast Food FACTS: 2013”<sup>1</sup> to measure changes over time.**

We did not have access to fast-food industry proprietary documents, including privately commissioned market research, media, and marketing plans, or other strategic documents. Therefore, we do not attempt to interpret fast-food companies' goals or objectives for their marketing practices.

Rather, we provide transparent documentation of:

- Advertising spending in all measured media by fast-food restaurants;
- The extent of children's and teens' exposure to TV advertising for fast food;
- TV advertising targeted to Black and Hispanic youth, including on Black-targeted and Spanish-language TV and disproportionate exposure by Black versus White youth; and
- Changes in advertising spending and exposure that occurred from 2012 to 2019.

### Scope of the analysis

This report focuses on **fast-food restaurants** (also known as quick-service restaurants) defined as food retailing institutions with a limited menu that offer pre-cooked or quickly prepared food available for take-out.<sup>2</sup> Many provide seating for customers, but no wait staff. Customers typically pay before eating and choose and clear their own table. We used Nielsen's "Quick Serve Restaurant (QSR)" category to identify all fast-food restaurants with any advertising spending in 2019. We also included Starbucks and Dunkin', which are listed in a separate Nielsen category. These two restaurants are included on the list of the 50 highest-ranking U.S. fast-food restaurants by sales reported in *QSR Magazine*.<sup>3</sup>

In addition to reporting on fast-food restaurant advertising in total, we provide more detailed analyses for individual restaurants. To narrow down the list of individual restaurants to examine, we identified the **top fast-food advertisers** in the United States in 2019. These 27 restaurant chains include the 25 fast-food restaurants with the highest advertising spending in 2019, and two additional restaurants with TV advertising targeted to children, Hispanic, and/or Black consumers. In some analyses, we also group individual restaurants by **fast-food company**, or the corporation or other type of firm that owned the restaurant as of December 2019. Some fast-food companies own more than one fast-food restaurant chain.

## Traditional media advertising

To measure fast-food advertising, we licensed data on advertising spending in all measured media in 2019 from Nielsen for all fast-food restaurants, as well as exposure to TV advertising by age group, including advertising placed on children's TV channels. To identify targeted advertising, we examined advertising on Spanish-language TV and Black-targeted TV channels, and exposure to advertising by Black youth relative to White youth on all national TV programming.

### Advertising spending

Nielsen tracks total media spending in 18 different media including TV (including Spanish-language TV), internet (digital), radio, magazines, newspaper, free-standing insert coupons (FSIs), and outdoor advertising. These data provide a measure of **advertising spending**.

### TV advertising exposure

To measure exposure to TV advertising, we utilized 2019 **gross rating points** (GRP) data from Nielsen. GRPs measure the total audience delivered by a brand's media schedule. They are expressed as a percent of the population that was exposed to each commercial over a specified period-of-time across all types of TV programming. GRPs are the advertising industry's standard measure to assess audience exposure to advertising campaigns, and Nielsen is the most widely used source for these data.<sup>4</sup> GRPs, therefore, provide an objective assessment of advertising exposure.

In addition, GRPs can be used to measure advertisements delivered to a specific audience, such as age or other demographic groups (also known as target rating points, or TRPs). We obtained 2019 GRP data for the following age groups: preschoolers (2-5 years), children (6-11 years), teens (12-17 years), and adults (18-49 years). These data provide total exposure to advertising on national (network, cable, and syndicated) and local (spot market) TV combined.

Nielsen calculates GRPs as the sum of all advertising exposures for all individuals within a demographic group, including multiple exposures for individuals (i.e., gross impressions), divided by the size of the population, and multiplied by 100. Because GRPs alone can be difficult to interpret, we use GRPs to calculate **average number of ads viewed (exposure)**. This measure is calculated by dividing total GRPs for a demographic group during a specific time period by 100. It provides a measure of ads viewed by individuals in that demographic group during the time period measured. For example, if Nielsen reports 2,000 GRPs for 2- to 5-year-olds for a restaurant in 2019, we can conclude that all 2- to 5-year-olds viewed on average 20 ads for that restaurant in 2019.



Of note, our measure of total TV ads viewed differs from the measure used to evaluate food industry compliance with their **Children’s Food and Beverage Advertising Initiative (CFBAI)** industry self-regulatory program pledges. Through the CFBAI, participating companies pledge to advertise only foods that meet nutrition standards in child-directed media.<sup>5</sup> McDonald’s and Burger King are the only fast-food restaurants to participate in CFBAI. Moreover, these pledges apply only to advertising in children’s TV programming as defined by audience composition (e.g., programs in which at least 35% of the audience are younger than age 12).<sup>6</sup> However, less than one-half of all food advertisements viewed by children younger than 12 occur during children’s programming.<sup>7</sup> In contrast, total TV ad exposure measures the total number of fast-food ads that children view during all types of TV programming.

### TV advertising targeted to youth

GRPs also provide a per capita measure to examine relative exposure between age groups. For example, if a fast-food restaurant had 2,000 GRPs in 2019 for 2- to 5-year-olds and 1,000 GRPs for 18- to 49-year-olds, then we can conclude that preschoolers saw twice as many ads for that restaurant in 2019 compared with adults. Therefore, we also use GRPs to calculate **targeted ratios**, or the relative exposure to advertising by each youth age group compared to adults, as follows:

- Preschooler-targeted ratio = GRPs for 2-5 years/GRPs for 18-49 years
- Child-targeted ratio = GRPs for 6-11 years/GRPs for 18-49 years
- Teen-targeted ratio = GRPs for 12-17 years/GRPs for 18-49 years

A targeted ratio greater than 1.0 indicates that, on average, persons in the group of interest (e.g., children in the child-targeted ratio) viewed more advertisements than persons in the comparison group (i.e., adults). For example, a child-targeted ratio of 2.0 indicates that children viewed twice as many ads as adults viewed. A targeted ratio of less than 1.0 indicates that persons in the group of interest viewed fewer ads than the comparison group.

We also compare targeted ratios to **TV viewing time ratios** for the same age groups, or the average time spent watching TV for youth in each age group compared to adults. The average weekly amount of time spent watching TV in 2019 was obtained from Nielsen Market Breaks for each youth age group and adults. We calculated the following 2019 TV viewing time ratios: 0.86 for preschoolers versus adults, 0.63 for children, and 0.46 for teens. These viewing time ratios are all less than 1.0, which indicates that youth in all age groups watched less TV on average than adults watched in 2019.

### Advertised products and menus

Nielsen advertising spending and exposure data also provide information about the specific products featured in TV advertisements. For the top fast-food advertisers, we used the description in the Nielsen data to classify all ads by **product type**, as follows:

- **Restaurant** ads promote the restaurant in general, but not a specific product.
- **Digital** offerings promote the restaurant’s website or mobile app, typically to encourage online ordering.
- **Special menus** describe menu items that restaurants promote together as a group, including,
  - › **Value menu**, or individual menu items or combo meals that are offered at a special price or promoted as a good deal (e.g., dollar menu, value meals);
  - › **Meal bundles**, or meals promoted for multiple people to consume consisting of more than one type of menu item (e.g., chicken with sides);
  - › **Kids’ menu** consists of individual menu items or meals (i.e., kids’ meals) that are specifically labeled for kids to consume; and
  - › **Healthy menu**, or individual menu items that are designated by the restaurant as “healthier” in some way (e.g., lower calories), including all salads.
- **Individual menu items** include ads that feature one specific product (e.g., Impossible Whopper) or type of product (e.g., ice cream sundaes).
  - › Individual menu items are assigned to a specific category, including lunch/dinner main dishes, lunch/dinner sides, combo meal, pizza, salad, breakfast, sweets, snacks, coffee, and miscellaneous drinks.
  - › Individual menu items are also categorized as a special menu if the restaurant includes the item in that menu (e.g., side dishes or drinks on value menus).

To identify special menus offered by the top fast-food advertisers and the individual menu items available on each special menu, researchers reviewed restaurant websites in October-December 2020. Special menus offered by the restaurants are listed in **Appendix Table 2**.

### Advertising on children’s TV

We also obtained ad spending and GRP data by TV distributor for children’s programming only. Nielsen classifies **children’s TV** as the following program types: child day animation, child day-live, child evening, child multi-weekly, and child news-information. Children’s TV channels include Cartoon Network,

Disney XD, Nickelodeon, and NickToons. In addition, we identified a subset of children's TV programming where preschoolers were the primary audience. **Preschool TV** networks include Nick Jr. and Universal Kids.

To obtain TV ads viewed on **other TV** (i.e., not children's) channels we subtracted fast-food TV ads viewed by preschoolers and children on children's TV from total fast-food ads viewed.

To assess changes in exposure to ads on children's TV by restaurant, we utilized 2016 data from a previous Rudd Center report, *FACTS 2017: Food industry self-regulation after 10 years*.<sup>8</sup> That report detailed ads viewed on children's TV by CFBAI participating companies and by other companies (including fast-food restaurants) with at least one brand that ranked among the top-50 brands advertised most to children in 2016. Previous Fast Food FACTS reports have not included data on ad spending or exposure on children's TV.

## Targeted advertising

To identify targeted advertising, the 2019 Nielsen data also include advertising spending on Spanish-language and Black-targeted TV channels, as well as exposure to advertising on Spanish-language TV by Hispanic youth and exposure to ads on all national TV by Black and White youth.

## Targeted television networks

All advertising on **Spanish-language TV**, or Spanish-language cable and network TV that broadcast in Spanish, is considered to be targeted to Hispanic audiences. Spanish-language TV distributors include Azteca, Discovery en Español, Discovery Familia, ESPN Deportes, Estrella TV, FOX Deportes, Galavisión, Universo, Telemundo, UniMás, Univisión, and Univisión Deportes.

**Black-targeted TV** includes cable and network distributors with more than 50% of their audience who self-identify as Black according to Nielsen MarketBreaks. Black-targeted TV distributors include BET, Central City Entertainment, NBA TV, TV One, and VH1.

## Advertising spending

We report the following targeted advertising spending measures:

- **Spanish-language TV spending** includes advertising expenditures on all Spanish-language TV. We present spending by restaurant, as well as by product type.
- **Black-targeted TV spending** includes advertising expenditures on all Black-targeted TV channels.

In addition, we calculated the percentage of restaurants' total TV advertising spending devoted to Spanish-language and Black-targeted TV programming.

- **Spanish-language % of TV ad spending** is calculated by dividing Spanish-language TV spending by total TV spending.
- **Black-targeted % of TV ad spending** is calculated by dividing Black-targeted TV spending by total TV spending on national TV.

To report changes in TV advertising spending, we utilized Nielsen advertising data reported in previous Rudd Center reports. We compare 2019 Spanish-language ad spending to 2012 spending reported in *Fast Food FACTS 2013*.<sup>9</sup> That report did not report ad spending on Black-targeted TV, so we document changes in ad spending on Black-targeted TV using 2017 data for the largest restaurants reported in a previous Rudd Report<sup>10</sup> on targeted advertising. The analyses of 2019 advertising spending in this report uses the same methods as these previous reports, allowing for valid comparisons.

## Advertising exposure

To assess exposure by Hispanic youth to Spanish-language advertising, we utilize GRP data for advertising that occurred on Spanish-language TV. Exposure to Spanish-language TV ads is calculated based on the number of persons on Nielsen's viewer panel living in Hispanic households.

- **Spanish-language TV ads viewed** is the average number of Spanish-language TV ads viewed by Hispanic preschoolers (2-5 years), children (6-11 years), and teens (12-17 years).

To assess advertising targeted to Black youth, we also obtained GRPs for advertising viewed by Black and White youth in the same age groups on national TV (network, cable, and syndicated TV programming). Nielsen does not provide spot market GRPs for Black consumers at the individual level. Spot TV advertising accounted for approximately 10% of all fast-food restaurant advertising viewed by children and teens during 2019.<sup>11</sup> Therefore, these data reflect an estimated 90% of Black youth exposure to all fast-food restaurant advertising on TV.

- **Black youth TV ad exposure** is the average number of TV advertisements viewed by Black preschoolers (2-5 years), children (6-11 years), and teens (12-17 years) on all network, cable, and syndicated TV programming (i.e., national TV, excludes spot TV).

As GRPs provide a per capita measure of advertising exposure for specific demographic groups, we also use GRPs to measure relative exposure to advertising between

Black and White youth in the same age groups. We report the following **Black-targeted ratios**, using national GRPs:

- Black preschooler-targeted ratio = GRPs for Black preschoolers / GRPs for White preschoolers.
- Black child-targeted ratio = GRPs for Black children / GRPs for White children.
- Black teen-targeted ratio = GRPs for Black teens / GRPs for White teens.

To identify advertising disproportionately targeted to Black preschoolers, children, and teens, we compare Black-targeted ratios for restaurants and product types to the average time spent watching TV for Black versus White youth. The average weekly amount of time spent watching TV in 2019 was obtained from Nielsen Market Breaks for Black and White youth in each age group. If the Black-targeted ratio is greater than the relative difference in the amount of TV viewed by each group, we can conclude that the advertiser likely designed a media plan to reach Black youth more often than would occur naturally.

The following 2019 daily **TV viewing time ratios** are used for comparison:

- 1.32 for Black versus White preschoolers (2:55 hrs:min of TV viewing for Black preschoolers vs. 2:13 hrs:min for White preschoolers);
- 1.61 for Black versus White children (2:28 hrs:min of TV viewing for Black children vs. 1:32 hrs:min for White children);
- 1.58 for Black versus White teens (1:46 hrs:min of TV viewing for Black teens vs. 1:07 hrs:min for White teens).

Viewing time ratios higher than 1.0 indicate that Black youth in all age groups watched more TV on average than White youth in the same age group watched.

### Changes in exposure from 2012 to 2019

To report changes in TV advertising exposure by Hispanic, Black, and White youth we utilized Nielsen advertising data from 2012 previously reported in Fast Food FACTS 2013.<sup>12</sup>

The analyses of 2019 advertising data in this report uses the same methods as the previous report, allowing for a valid comparison, with one exception. Ad exposure for Black and White preschoolers and children were combined into one age category in the 2013 report (i.e., Black and White children [2-11 years]), but in this report we analyze data for Black and White preschoolers (2-5 years) and children (6-11 years) separately. Therefore, to measure changes in ad exposure from 2012 to 2019, we average ad exposure for Black and White preschoolers and children in 2019 and compare it to the combined age group in 2012.

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