

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.