

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%	0.71	0.74
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		0.77	0.62
17	Cicis Enterprise	Cicis Pizza	18.3	11.2	-39%	10.6	10.0	-6%	0.67	0.60
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

Most

Least

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%	0.55
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%	0.43
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%	0.45
9	Wendy's	Wendy's	119.9	33.2	-72%	0.40
10	Restaurant Brands Intl	Popeyes	45.3	31.9	-30%	0.44
11	Doctor's Associates	Subway	205.0	30.3	-85%	0.45
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%	0.53
20	Roark Capital Group	Jimmy John's	**	8.2		0.45
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)

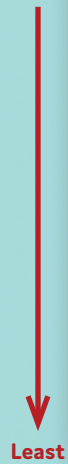
Ranking Table 4

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%	1.74	1.83
2	Restaurant Brands Intl	Burger King	137.0	113.0	107.0	-20%	1.88	1.90
3	Domino's Pizza	Domino's	97.7	112.0	106.6	12%	1.90	1.90
4	Yum! Brands	Taco Bell	84.2	91.6	84.2	4%	1.66	1.69
5	Roark Capital Group	Sonic	49.1	69.3	72.4	44%	1.67	1.85
6	Little Caesars Enterprise	Little Caesars	46.2	58.1	55.2	23%	1.77	1.79
7	Wendy's	Wendy's	93.5	47.2	43.9	-51%	1.84	1.81
8	Yum! Brands	KFC	68.8	47.8	43.8	-33%	1.79	1.79
9	Restaurant Brands Intl	Popeyes	36.4	43.4	40.9	16%	1.86	1.93
10	Yum! Brands	Pizza Hut	97.3	41.8	39.6	-58%	1.67	1.69
11	Doctor's Associates	Subway	154.8	40.3	39.4	-74%	1.60	1.69
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%	1.51	1.45
14	Papa John's Intl	Papa John's	35.4	28.4	25.6	-24%	2.18	2.14
15	Dunkin' Brands	Dunkin'	6.6	19.5	19.1	191%	1.53	1.55
16	Cicis Enterprise	CiCis Pizza	18.4	18.9	17.9	0%	1.95	2.26
17	Roark Capital Group	Jimmy John's	**	15.3	13.4		1.41	1.63
18	JAB Holding Company	Panera Bread	1.4	14.9	13.3	884%	1.73	1.68
19	Chipotle Mexican Grill	Chipotle	**	12.1	10.9		1.78	1.61
20	Sentinal Capital Partners	Captain D's	**	8.3	7.7		1.92	1.85
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		1.89	2.16
		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*

Most

Least

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	2.08
2	Restaurant Brands Intl	Burger King	231.3	121.1	-48%	1.75	1.87
3	Domino's Pizza	Domino's	148.8	103.0	-31%	1.78	1.79
4	Yum! Brands	Taco Bell	191.9	91.5	-52%	1.59	1.65
5	Roark Capital Group	Sonic	103.1	69.1	-33%	1.57	1.75
6	Little Caesars Enterprise	Little Caesars	76.0	56.4	-26%	1.53	1.70
7	Yum! Brands	KFC	133.5	50.3	-62%	1.49	1.75
8	Wendy's	Wendy's	177.1	46.7	-74%	1.75	1.77
9	Restaurant Brands Intl	Popeyes	64.9	44.7	-31%	1.81	1.98
10	Yum! Brands	Pizza Hut	194.6	43.3	-78%	1.52	1.70
11	Doctor's Associates	Subway	260.2	39.9	-85%	1.49	1.77
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	1.98
15	Dunkin' Brands	Dunkin'	13.2	20.4	54%	1.22	1.64
16	Cicis Enterprise	Cicis Pizza	24.4	17.0	-30%	1.60	2.48
17	JAB Holding Company	Panera Bread	2.2	12.4	456%	0.99	1.55
18	Chipotle Mexican Grill	Chipotle	**	11.7			1.63
19	Roark Capital Group	Jimmy John's	**	11.1			1.82
20	Sentinal Capital Partners	Captain D's	**	7.0			1.70
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			1.83
		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)