

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)

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	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, NickJr , 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, Ukids
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, NickJr , Nktns, Toons, Ukids
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