

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 ^a	Nutrition		Ad spending (6-11 y)	Teens (12-17 y)	Ad spending	Ad spending	Ads viewed ^b	Ad spending	Black-targeted ratio ^c
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)

^a Includes marketing to children and/or kids' meal nutrition; ^b Children (6-11y); ^c 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.¹ 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.²⁻⁴ 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.⁵⁻⁷
- 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.⁸ These youth also face greater risks for obesity and other diet-related diseases.⁹
- 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.¹⁰ 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.¹¹
 - › 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.^{12,13}
- Fast-food restaurants should ensure that healthier kids' meal beverage default policies extend to digital ordering apps.¹⁴ 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,¹⁵ 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 Kids¹⁶ 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.¹⁷ They should also include clear language on policy implementation and compliance monitoring.¹⁸
- 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.¹⁹
- The U.S. federal government should eliminate unhealthy food and beverage marketing to children as a tax-deductible corporate expense.²⁰
- 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.²¹

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.²²
- 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.²³

- Advocates should support youth-led countermarketing campaigns to expose marketing practices by the top fast-food advertisers.²⁴
- 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.²⁵

Conclusion

Fast-food advertising is a powerful commercial determinant of health.²⁶ 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.