

**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.

### References

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