

TOP FAST-FOOD RESTAURANTS

Top fast-food restaurants

Definition

Fast-food restaurant	Fast-food restaurants are food retailing institutions with a limited menu that offer pre-cooked or quickly prepared food available for take-out. ¹ Many provide seating for customers, but no wait staff. Customers typically pay before eating and choose and clear their own tables. They are also known as quick-service restaurants (QSRs).
Top fast-food advertisers	Fast-food restaurants that ranked in the top-25 in total advertising spending in 2019 and/or targeted their advertising to children, Hispanic, and/or Black consumers (N=27).
Fast-food company	Corporation or other entity that owns the restaurant. Some fast-food companies own more than one different fast-food restaurant chain.

In this report, we focus on the 25 U.S. fast-food restaurants with the highest advertising spending in 2019, plus two restaurants with TV advertising targeted to children, Hispanic, and/or Black consumers. U.S. sales of these 27 restaurants totaled \$188 billion in 2019, an average increase of 24% over 2012 sales¹ (see **Table 3**).

Table 3. Sales ranking of top fast-food advertisers: 2019

Sales ranking							
2019	2012	Company	Restaurant	Category	2019 U.S. sales (\$ mill)	% change vs. 2012	Top-25 ad spending in 2012
1	1	McDonald's Corp	McDonald's	Burger	\$40,413	14%	✓
2	3	Starbucks Corp	Starbucks	Snack	\$21,550	78%	✓
3	9	Chick-fil-A	Chick-fil-A	Chicken	\$11,000	138%	✓
4	6	Yum! Brands	Taco Bell	Global	\$11,000	47%	✓
5	5	Restaurant Brands Intl	Burger King	Burger	\$10,300	20%	✓
6	2	Doctor's Associates	Subway	Sandwich	\$10,000	-17%	✓
7	4	Wendy's	Wendy's	Burger	\$9,865	15%	✓
8	7	Dunkin' Brands	Dunkin'	Snack	\$9,220	47%	✓
9	13	Domino's Pizza	Domino's	Pizza	\$7,100	103%	✓
10	11	JAB Holding Company	Panera Bread	Sandwich	\$5,925	53%	✓
11	16	Chipotle Mexican Grill	Chipotle	Global	\$5,520	102%	✓
12	8	Yum! Brands	Pizza Hut	Pizza	\$5,380	-5%	✓
13	10	Yum! Brands	KFC	Chicken	\$4,820	8%	✓
14	12	Roark Capital Group	Sonic	Burger	\$4,687	24%	✓
15	15	Roark Capital Group	Arby's	Sandwich	\$3,885	30%	✓
16	22	Little Caesars Enterprise	Little Caesars	Pizza	\$3,850	29%	✓
18	18	Berkshire Hathaway	Dairy Queen	Snack	\$3,760	63%	✓
19	19	Restaurant Brands Intl	Popeyes	Chicken	\$3,750	66%	✓
20	14	Jack In The Box	Jack In The Box	Burger	\$3,505	14%	✓
21	17	Papa John's Intl	Papa John's	Pizza	\$2,655	11%	✓
23	25	Roark Capital Group	Jimmy John's	Sandwich	\$2,105	67%	
24	20	Roark Capital Group	Hardee's	Burger	\$2,070	9%	✓
25	*	Zaxby's Franchising	Zaxby's	Chicken	\$1,840		
26	31	Culver Franchising System	Culver's	Burger	\$1,730	106%	
30	24	Roark Capital Group	Carl's Jr.	Burger	\$1,390	-1%	✓
37	35	Oak Hill Capital Partners	Checkers/Rally's	Burger	\$862	24%	
*	46	Cici Enterprises	Cicis Pizza	Pizza			

*Not on QSR top-50 list

Source: The QSR 50; 2013;² 2020³

¹ Average increase for restaurants on the QSR top-50 list in 2012 and 2019

Table 4. Restaurant groups with multiple fast-food chains

Company*	Restaurants	
	Top fast-food advertisers	Other fast-food chains
Yum! Brands	Taco Bell; KFC; Pizza Hut	Habit Burger Grill
Restaurant Brands Intl	Burger King; Popeyes	Tim Hortons
Roark Capital Group	Sonic; Arby's; Carl's Jr.; Hardee's; Jimmy John's	Moe's Southwest Grill; Schlotzsky's; Jamba Juice; Auntie Anne's; Rusty Taco

*Includes all restaurant group companies that own top fast-food advertisers

The top fast-food advertisers all ranked among the 50 restaurants with the highest U.S. sales in 2019, with one exception (Cicis Pizza). However, some restaurants that ranked in the top-30 in sales had little to no advertising spending and are not included in this report: Panda Express (#17), WhatABurger (#23), Five Guys (#27), Raising Cane's (#28), and Wingstop (#29).

From 2012 to 2019, sales increased at all top fast-food advertisers, with the exception of Subway, Pizza Hut, and Carl's Jr. Sales at four restaurants more than doubled during this time: Chick-fil-A, Domino's Pizza, Chipotle, and Culver's. Of note, Chick-fil-A rose from ninth in sales in 2012 to third in 2019, and Domino's Pizza rose from 13th to ninth.

Fast-food companies included companies that owned individual fast-food chains (e.g., McDonald's Corp, Starbucks Corp), as well as restaurant groups that owned multiple chains (see **Table 4**).

Key findings: Top fast-food advertisers

- Sales for the 27 top fast-food advertisers totaled \$188 billion in 2019, an average increase of 24% compared to 2012.
- From 2012 to 2019, sales increased for all but three of these restaurants (Subway, Pizza Hut, and Carl's Jr.). Sales more than doubled for four restaurants (Chick-fil-A, Domino's, Chipotle, and Culver's).

TRADITIONAL MEDIA ADVERTISING

In this section, we examine traditional advertising by fast-food restaurants in 2019 and changes versus 2012 when available. We first present advertising spending in all measured media, including TV, radio, outdoor, and digital, in total and by restaurant. We then provide preschooler, child, and teen exposure to TV advertising in total and by restaurant. Finally, we present data on the products, special menus, and individual menu items with the most total advertising in 2019, including TV advertising targeted to children and teens. Most analyses focus on the 27 top fast-food advertisers.

Advertising spending

Advertising spending	Definition
Advertising spending	Amount spent on all measured media, including TV, magazines, digital, radio, newspapers, FSI coupons, and outdoor.

Fast-food advertising spending totaled more than \$5.0 billion in 2019, an increase of 9% over the \$4.6 billion spent in 2012. TV represented 91% of total advertising spending, including national TV (broadcast, cable, and syndicated) (68%) and spot TV (i.e., local) (23%) (see **Figure 1**). Outdoor, radio, and digital ads each represented less than 5% of total ad spending in 2019. From 2012 to 2019, fast-food TV ad spending increased by 12% (vs. \$4.1 billion 2012). Radio and outdoor advertising spending declined (32% and 7%, respectively), while digital advertising increased by 74%.

Ad spending by company

In 2019, 274 different fast-food restaurants advertised in any type of media, but six companies were responsible for 65% of all fast-food ad spending, totaling \$3.3 billion (see **Figure 2**). McDonald's Corp and Yum! Brands (Taco Bell, Pizza Hut, and KFC) each represented 15% of total fast-food advertising spending, and Roark Capital Group (Sonic, Arby's, Hardee's, Carl's Jr.) represented another 11%. Restaurant Brands Intl (Burger King, Popeyes) and Domino's Pizza contributed approximately 9% of ad spending, and Doctor's Associates (Subway) was responsible for 5%.

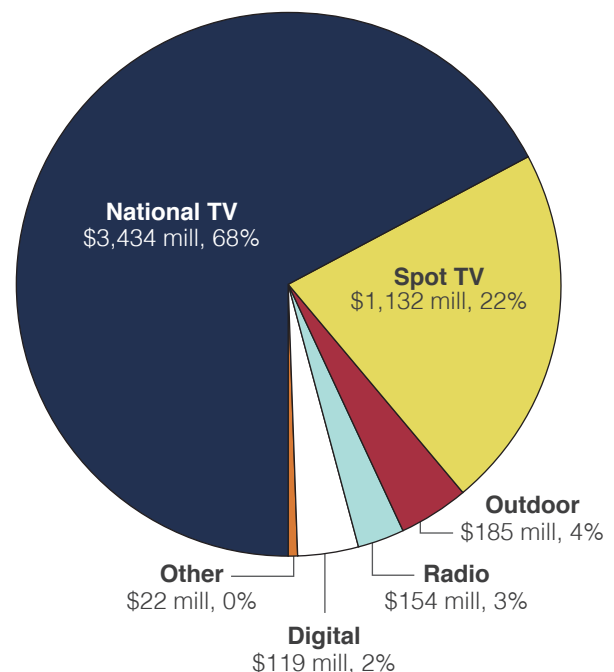
Total combined ad spending by these six companies did not change from 2012 to 2019. However, two companies reduced their spending during this time: McDonald's Corp (-20%) and Doctor's Associates (-58%). Yum! Brands advertising remained relatively unchanged (-1%). In contrast, ad spending by the other three companies increased by 28% or more; Domino's Pizza advertising more than doubled.

Ad spending by restaurant

Ranking Table 1 presents total advertising spending for the top fast-food advertisers. These 27 restaurants represented 92% of all fast-food ad spending.

Figure 1. Total fast-food ad spending by media type: 2019

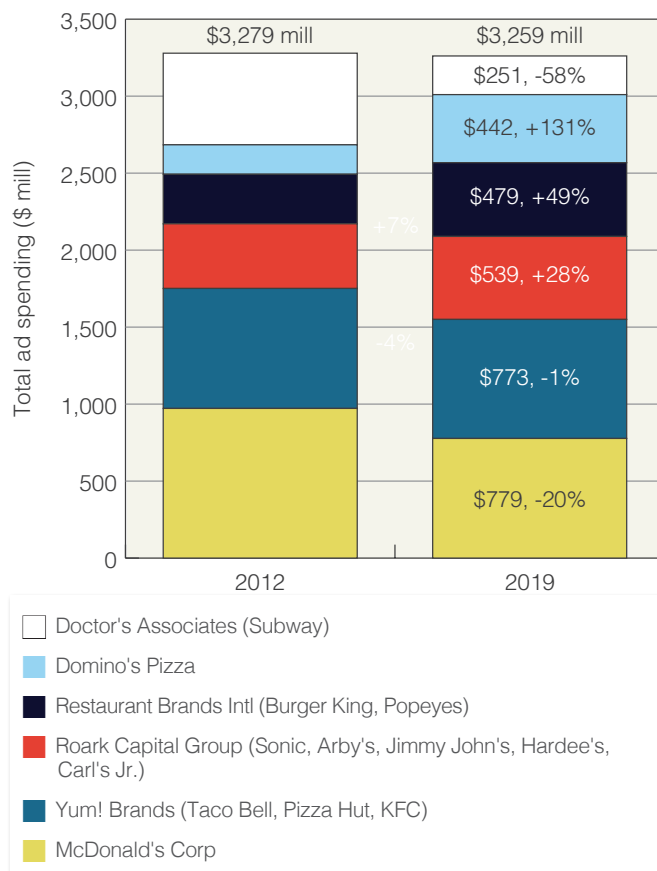
Total ad spending in 2019: \$5.0 billion



Source: Analysis of 2019 Nielsen data (Nielsen Global Media)

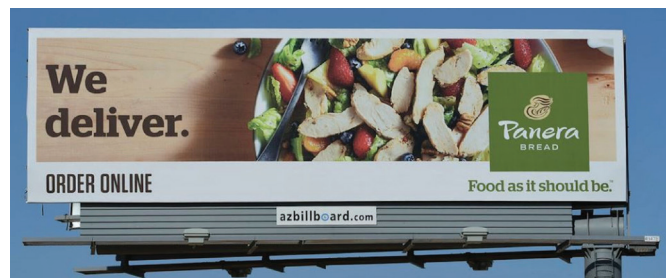
As in 2012, McDonald's spent far more than any other restaurant in 2019 (\$777 million), while Domino's (\$442 million) surpassed Subway as second in ad spending. Taco Bell and Burger King each spent over \$300 million, and four restaurants (Subway, Wendy's, Sonic, and KFC) spent more than \$200 million. These eight restaurants were responsible for 52% of all advertising spending in 2019.

Figure 2. Changes in ad spending by the top-six fast-food companies: 2012 vs. 2019



Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

Changes in ad spending. Only seven restaurants reduced their advertising from 2012 to 2019, including Subway and McDonald's as noted previously (see **Table 5**). The 20 remaining restaurants increased their advertising spending. Domino's and three additional restaurants increased their advertising by two times or more (Chick-fil-A, Little Caesars, and Chipotle). Two restaurants that did not advertise in 2012 ranked among the top advertisers in 2019 (Zaxby's and Jimmy John's).



Dunkin', Chick-fil-A, and Panera spent a disproportionately high amount on outdoor advertising.

Ad spending by media. All top fast-food advertisers devoted 80% or more of their total ad spending to TV. TV advertising represented 98% or more of advertising spending for Burger King, Domino's, Sonic, and Popeyes.

A few restaurants spent a greater proportion of advertising on other types of media (not TV). Consistent with its high advertising budget, McDonald's spent the most on outdoor (\$70.7 mill), radio (\$33.0 mill), and digital (\$39.3

Table 5. Restaurants with the greatest changes in ad spending: 2012 vs. 2019

Restaurant	Spending decline	Restaurant	Spending increase
Subway	-\$344.8 mill (-58%)	Domino's	\$250.6 mill (+131%)
McDonald's	-\$194.9 mill (-20%)	Burger King	\$112.4 mill (+48%)
KFC	-\$57.6 mill (-22%)	Taco Bell	\$102.8 mill (+37%)
Pizza Hut	-\$51.2 mill (-21%)	Chick-fil-A	\$89.5 mill (+299%)
Wendy's	-\$27.5 mill (-10%)	Little Caesars	\$86.3 mill (+98%)
Jack In The Box	-\$23.4 mill (-23%)	Chipotle	\$67.5 mill (+3613%)

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

mill) advertising. Subway also ranked among the top-five advertisers in outdoor (\$9.4 mill), radio (\$19.1 mill), and digital (\$11.5 mill). Additional advertisers with notable spending on outdoor ads included Dunkin' (\$14.1 mill), Chick-fil-A (\$8.8 mill), and Panera Bread (\$8.1 mill).

Taco Bell (\$19.0 mill) and Wendy's (\$16.2 mill) also ranked in the top-five for radio advertising, while Wendy's (\$7.3 mill), KFC (\$6.4 mill), and Pizza Hut and Starbucks (\$6.3 mill each) had high digital advertising.



KFC, Wendy's, and Starbucks ranked in the top-five restaurants in digital advertising spending.

TV advertising exposure

TV advertising exposure

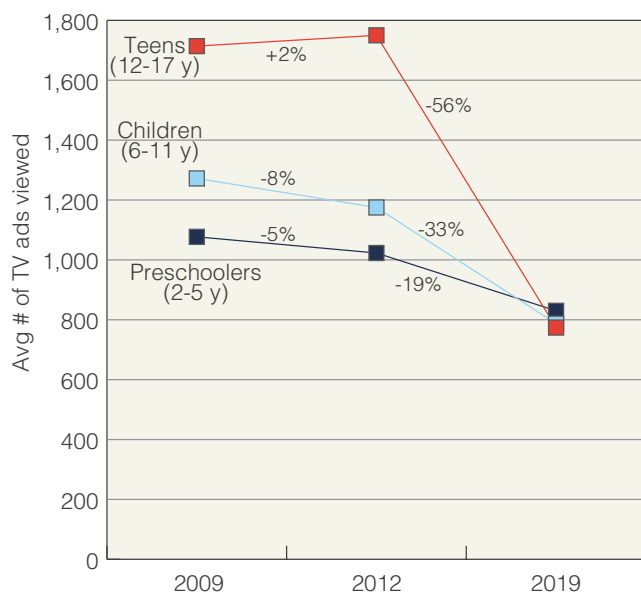
Definition

Gross ratings points (GRPs)	Measure of the per capita number of TV advertisements viewed by a specific demographic group over a period of time across all types of programming. GRPs for specific demographic groups are also known as targeted rating points (TRPs).
Average number of ads viewed (exposure)	GRPs divided by 100. Provides a measure of the number ads viewed by individuals in a specific demographic group, on average, during the time period measured.
Targeted ratios (vs. adults)	A measure of relative exposure by youth versus adults, calculated by dividing GRPs for preschoolers (2-5 years), children (6-11 years), or teens (12-17 years) by GRPs for adults (18-49 years).
TV viewing times	The average amount of time that youth in each age group spent watching television in a day.

In 2019, preschoolers (2-5 years) viewed on average 830.0 fast-food TV ads (2.3 ads-per-day), children (6-11 years) viewed 786.5 ads (2.2 ads-per-day), and teens (12-17 years) viewed 774.5 ads (2.1 ads-per-day). On average, all youth age groups viewed 42% to 45% the number of TV ads viewed by adults (18-49 years), who viewed 1,864.9 ads on average (5.1 ads-per-day).

From 2012 to 2019, the number of fast-food TV ads viewed declined by 19% for preschoolers, 33% for children, and 56% for teens (see **Figure 3**). These declines should be evaluated in the context of trends in TV viewing time (see **Figure 4**). From 2013 to 2019, the amount of time children in all age groups spent watching TV decreased at higher rates.ⁱⁱ Preschoolers and children spent 44% and 51% less time watching TV in

ⁱⁱ Data for 2012 TV viewing times were not available, so changes from 2013 are reported.

Figure 3. Trends in youth exposure to TV ads: 2010-2019

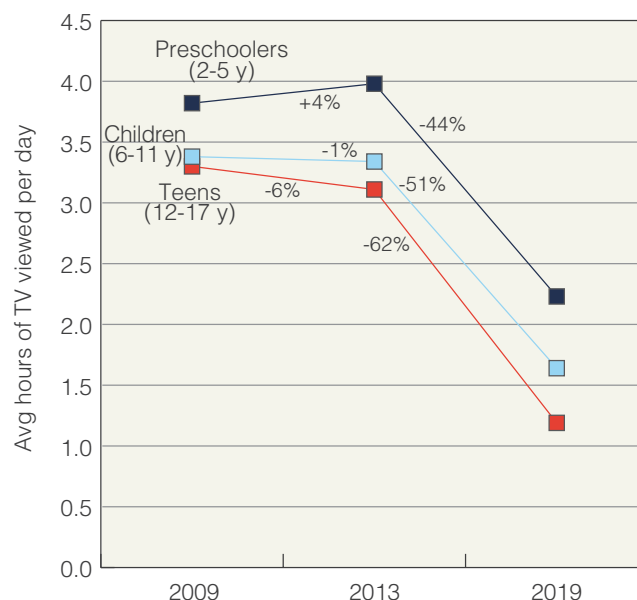
Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

2019 compared to 2013, and teens spent 62% less time watching TV. Therefore, the decline in number of ads viewed by preschoolers, children, and teens was lower than expected given significant declines in TV viewing times.

TV advertising exposure by company

In 2019, the six companies with the most fast-food advertising spending also led in fast-food TV ads viewed by youth. McDonald's Corp contributed the most ads viewed by children (128.9 ads), whereas Yum! Brands (Taco Bell, Pizza Hut, and KFC) contributed the most ads viewed by preschoolers and teens (136.9 and 137.9 ads, respectively) (see **Figure 5**). Young people also viewed a high number of TV ads for Restaurant Brands Intl (Burger King, Popeyes), Roark Capital Group (Sonic, Arby's, Hardee's, Carl's Jr), Domino's Pizza, and Doctor's Associates (Subway). These six companies were responsible for 71% to 72% of total TV ads viewed by all youth.

Despite overall declines in TV viewing times and total fast-food ad exposure from 2012 to 2019, a number of companies increased their advertising to preschoolers and/or children. Roark Capital Group ads increased by 51% for preschoolers and 18% for children, while Domino's Pizza ads increased by 37% and 9%, respectively. Preschoolers also viewed 9% more ads for Restaurant Brands Intl.

Figure 4. Trends in youth TV viewing times: 2010-2019

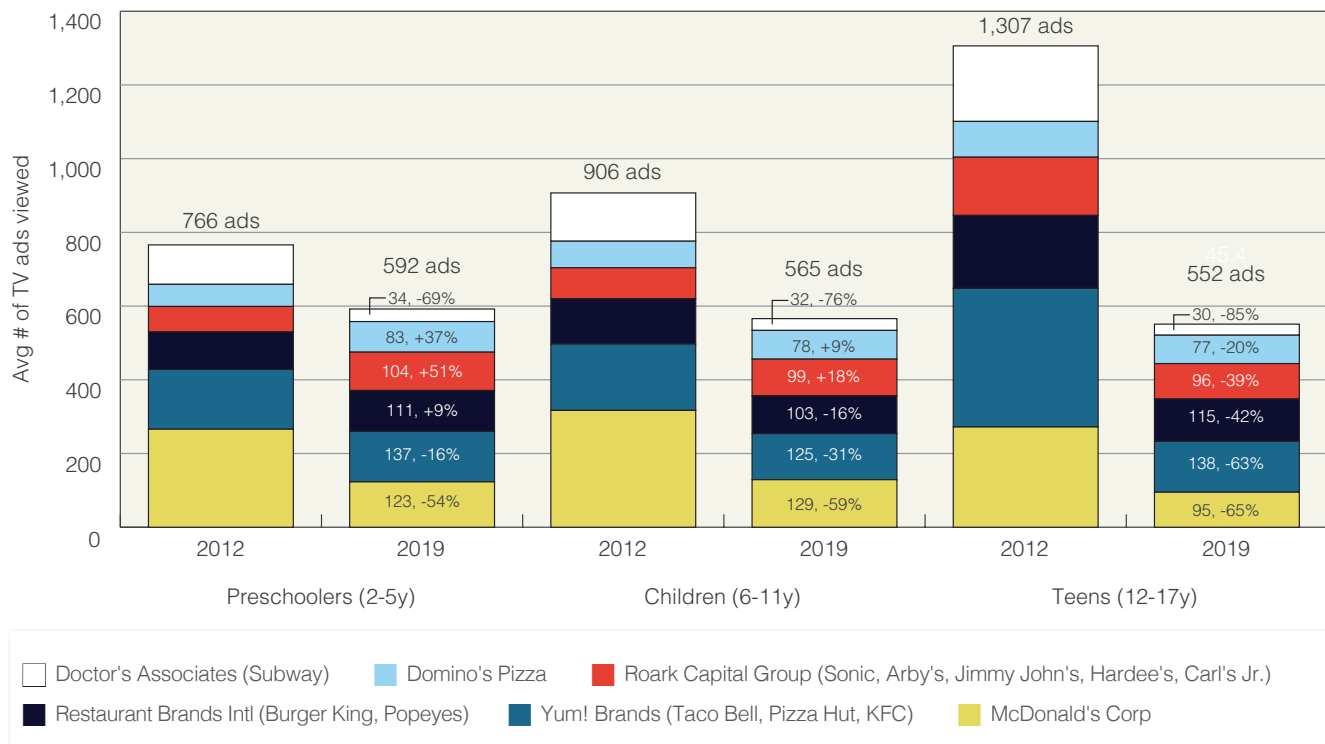
Source: Analysis of 2010, 2013, and 2019 Nielsen data

Consistent with large declines in ad spending, McDonald's Corp and Doctor's Associates (Subway) ads viewed by preschoolers and children declined from 2012 to 2019. Exposure to Yum! Brands ads also declined by 16% for preschoolers and 31% for children. Teens' exposure to ads for all six companies also declined during this period.

TV advertising exposure by restaurant

Ranking Tables 2 and 3 display the average number of fast-food TV ads viewed by preschoolers, children, and teens by restaurant in 2012 and 2019. The 27 top fast-food advertisers accounted for 96% to 97% of fast-food TV ads viewed by all youth.

At the restaurant level, McDonald's was the top advertiser to all youth age groups, accounting for 15% to 16% of ads viewed by preschoolers and children, and 12% of ads viewed by teens. Consistent with advertising spending rankings, Domino's, Burger King, and Taco Bell also ranked in the top-four advertisers to preschoolers, children, and teens. Sonic ranked number-five in ads viewed by preschoolers, children, and teens, compared to its number-seven ranking in ad spending (both Subway and Wendy's had higher total spending). These top-five restaurants accounted for 49% to 50% of ads viewed by all youth.

Figure 5. Changes in TV ad exposure for top-six companies: 2012 vs. 2019

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

Changes in ads viewed. Despite an overall decline in fast-food TV ad exposure, ads viewed by preschoolers increased for 12 of the 27 top fast-food advertisers (see **Table 6**). Compared to 2012, preschoolers saw 9 to 24 additional ads for Sonic, Domino's, Taco Bell, Popeyes, and Dairy Queen in 2019. Ads viewed by children also increased for 11 of these restaurants.

For all restaurants except Chick-fil-A, percent increases were consistently higher for preschoolers than for children.

The number of ads viewed by teens increased for three of the top fast-food advertisers. Panera Bread had the greatest increase in ads viewed by teens, followed by Chick-fil-A. Three additional restaurants advertised to youth on TV in 2019.

Table 6. Restaurants with the greatest increases in ads viewed by age group: 2012 vs. 2019

Restaurant	Preschoolers (2-5 y)		Children (6-11 y)		Teens (12-17 y)	
	Change in avg # of ads viewed	% change	Change in avg # of ads viewed	% change	Change in avg # of ads viewed	% change
Sonic	+24.4	77%	+14.4	37%	*	
Domino's	+22.2	37%	+6.7	9%	*	
Taco Bell	+15.7	30%	+0.2	<1%	*	
Popeyes	+11.7	55%	+3.7	14%	*	
Dairy Queen	+9.0	38%	+0.5	2%	*	
Panera Bread	+7.8	356%	+6.9	296%	+5.6	164%
Little Caesars	+7.5	22%	+5.0	15%	*	
Dunkin'	+6.4	48%	+5.3	37%	*	
Chick-fil-A	+4.6	126%	+4.1	128%	+3.1	97%

*Ads viewed decreased for this age group

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

Table 7. Restaurants with the greatest decreases in ads viewed by age group: 2012 vs. 2019

Restaurant	Preschoolers (2-5 y)		Children (6-11 y)		Teens (12-17 y)	
	Change in avg # of ads viewed	% change	Change in avg # of ads viewed	% change	Change in avg # of ads viewed	% change
McDonald's	-142.6	-54%	-188.0	-59%	-177.3	-65%
Subway	-73.0	-69%	-99.3	-76%	-174.7	-85%
Pizza Hut	-29.9	-47%	-37.9	-54%	-103.9	-75%
Wendy's	-26.3	-44%	-37.4	-55%	-86.6	-72%
KFC	-11.2	-25%	-17.6	-36%	-61.0	-63%
Burger King	-2.2	-3%	-22.6	-24%	-68.5	-45%
Taco Bell	*		*		-73.4	-52%

*Ads viewed increased for these age groups

Shading indicates a higher percentage decline in ads viewed compared to declines in TV viewing times for the age group

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

that had not advertised in 2012: Jimmy John's, Chipotle, and Zaxby's.

McDonald's and Subway TV ads viewed by preschoolers, children, and teens declined by more than 50% (see **Table 7**). However, preschoolers and children saw 40 to 50 more ads for McDonald's compared to Domino's, the second most frequent advertiser to these groups. In contrast, Subway fell from second in ads viewed by all age groups in 2012 to eighth for preschoolers and children and eleventh for teens in 2019. These declines were greater than 2013 to 2019 declines in TV

viewing times for all age groups (44% for preschoolers, 51% for children, and 62% for teens).

Percentage declines in TV ads viewed from 2012 to 2019 for Pizza Hut also exceeded declines in TV viewing times for all age groups, while declines in ads viewed for Wendy's exceeded declines in TV viewing times for children and teens (but not preschoolers). Declines in ad exposure for Burger King, KFC, and Taco Bell (teens only), were equal to or less than declines in TV viewing times for all age groups.

Advertised products and menus

Advertised products and menus

Definition

Product type	The specific product featured in the ad, including special menus, individual menu items, digital offerings (mobile apps and websites), and the restaurant in general.
Special menus	Menu items that restaurants promote together as a group, including value menus, meal bundles, kids' menus, and healthy menus.
Value menu	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	Meals promoted for multiple people consisting of more than one type of menu item (e.g., main dish and sides).
Kids' menu	Individual menu items or meals (i.e., kids' meals) that are specifically labeled for kids.
Healthy menu	Individual menu items that are designated by the restaurants as "healthier" in some way (e.g., lower calories), including salads.
Individual menu items	One specific fast-food item or type of product. Individual menu items are also assigned to a specific category, including lunch/dinner main dishes, lunch/dinner sides, combo meals, pizza, salads, 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).

Of the \$4.7 billion spent by the top fast-food advertisers in 2019, advertising for individual menu items or special menus represented 58% of total advertising spending (see **Figure 6**). Of the special menu types, value menus and meal bundles received the most advertising (6% of total spending), followed by healthy menus (1.4%) and kids' meals (0.6%). The remaining advertising promoted either the restaurant in general (38%) or digital offerings (mobile apps and websites, 4%).

Individual menu items (including items on value menus, meal bundles, and healthy menus) also represented more than one-half (57-61%) of fast-food TV ads viewed by all age groups, followed by ads for the restaurants in general (29-30%) (see **Figure 7**). Of the individual menu items advertised, lunch/dinner main dishes represented 43% of ads viewed by all youth, followed by combo meals (15-16%), pizza (11%), and sweets (9%).

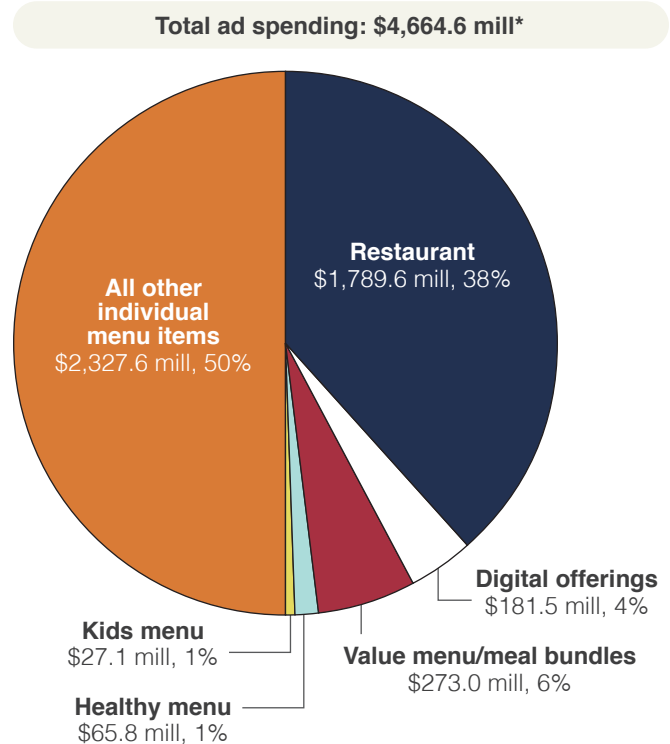
Kids' meals ranked a distant third in TV ads viewed by preschoolers and children, representing just 8% and 10% of total ads viewed by these age groups. However, they were highly targeted to 2- to 11-year-olds. Preschoolers viewed three times as many ads for kids' meals as adults did, while children viewed about 3.4 times as many. Notably, restaurants devoted less than 1% of their total advertising spending to kids' meals.

For teens, value menus/meal bundles ranked third in ads viewed by menu type (6-7% of ads viewed by all age groups), followed by kids' meals (5%). Ads for digital offerings represented another 4% of ads viewed by preschoolers, children, and teens. TV advertisements for healthy menu items accounted for just 1% of total ads viewed by all youth.



Value menus and meal bundles were the most commonly advertised types of special menus.

Figure 6. Total ad spending by product type: 2019



*Spending by top fast-food advertisers
Source: Analysis of 2019 Nielsen data

Advertised products by restaurant

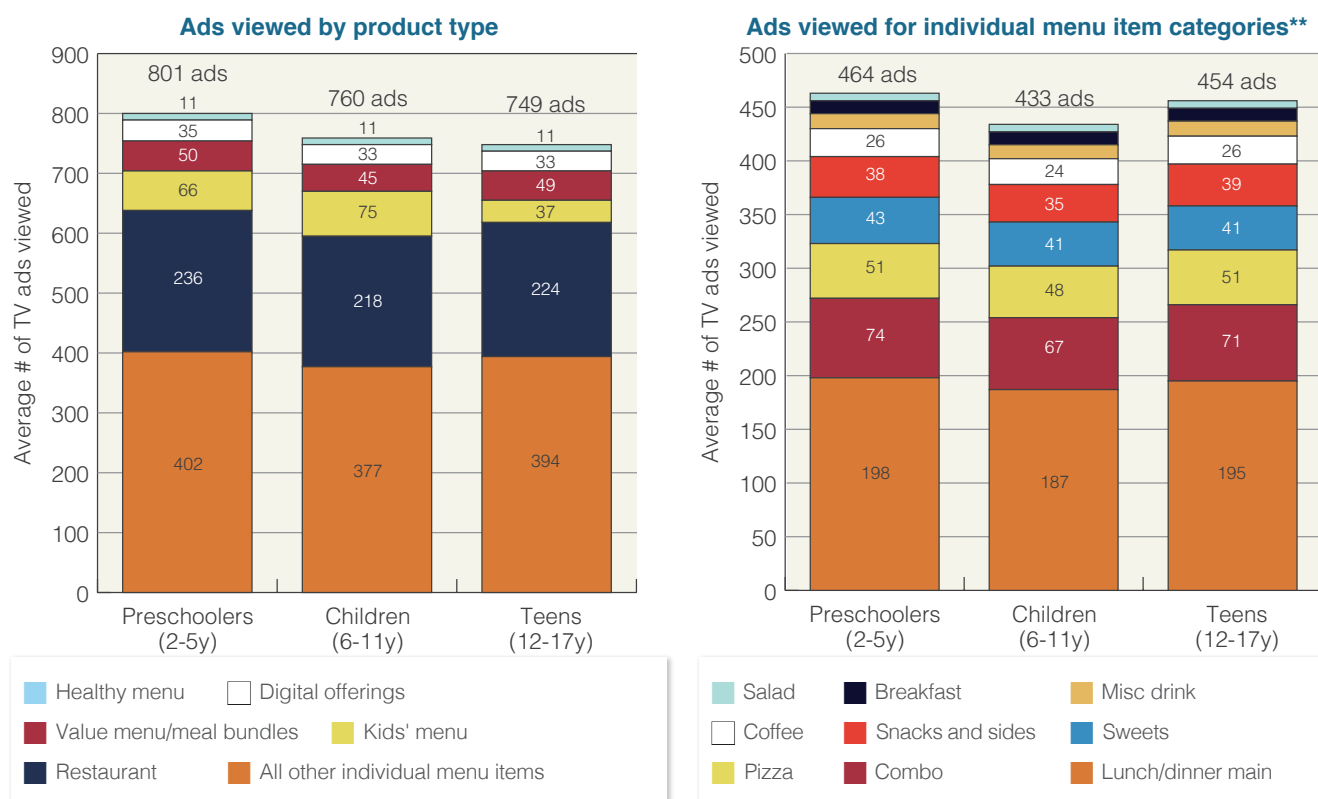
The majority of restaurants devoted one-quarter or more of total advertising spending to general restaurant ads. Dunkin' was the only restaurant that did not have any restaurant-level ads.

Eleven restaurants advertised their mobile app and/or website digital offerings (see **Table 8**). Domino's spent \$121 million, one-quarter of its total advertising budget, to promote its digital ordering options, followed by Little Caesars. These two restaurants devoted by far the most advertising to digital. McDonald's, Pizza Hut, and Wendy's each spent more than \$5 million on digital options, but that represented 4% or less of their total advertising budgets.

Ads for special menus. Although most restaurants offered value menu items or meal bundles ($n=16$), salads and/or other healthy menu items ($n=13$), and kids' meals ($n=17$) (see **Appendix Table 2** for listing of special menus by restaurants), relatively few restaurants advertised these items.

Eleven restaurants advertised their value menus and/or meal bundles (see **Appendix Table 3**). KFC (\$20 Fill Up, \$5 Fill-up Box) and Taco Bell (\$5 Box, Taco Party Pack) devoted more

Figure 7. TV ad exposure by product type and menu item category: 2019*



*Includes ads viewed for top fast-food advertisers

**Some individual menu items are also included in special menus (e.g., value and healthy menus)

Source: Analysis of 2019 Nielsen data

than one-quarter of their ad budgets to this special menu type, the highest proportion for any restaurant. Wendy's value menu (Biggie Bag) also represented about 10% of its total ad spending.

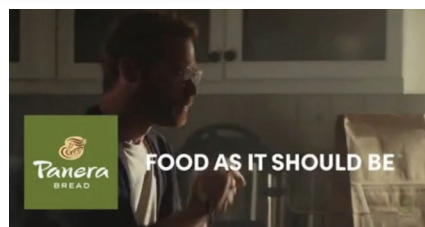
Only seven restaurants advertised their healthy menus. However, Panera Bread (Baja Grain Bowl) and Zaxby's (Zalads) devoted more than one-quarter of their ad budgets to healthy menu items.

Table 8. Ad spending on digital offerings: 2019

Restaurant	Digital offerings (\$000)	% of total ad spending	Advertised products
Domino's	\$121,175.2	27%	Mobile app, Dominos.com
Little Caesars	\$31,877.3	18%	Mobile app, LittleCaesars.com
Pizza Hut	\$7,721.9	4%	PizzaHut.com
Chipotle	\$2,228.4	3%	Mobile app
Wendy's	\$5,409.4	2%	Mobile app
Papa John's	\$2,586.9	2%	PapaJohns.com
McDonald's	\$8,824.4	1%	Mobile app
Popeyes	\$769.1	1%	Mobile app
Starbucks	\$281.8	0%	Mobile app
Dunkin'	\$341.5	0%	Mobile app
Subway	\$124.4	0%	Mobile app

Source: Analysis of 2019 Nielsen data

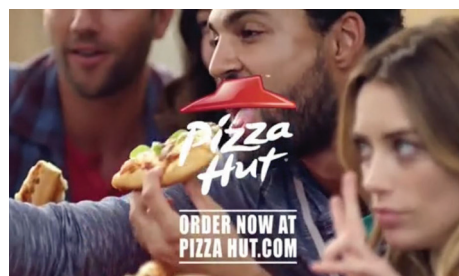
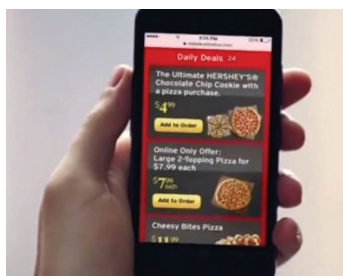
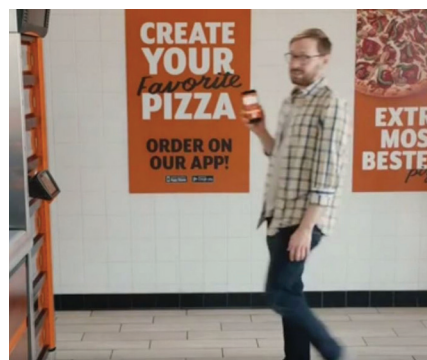
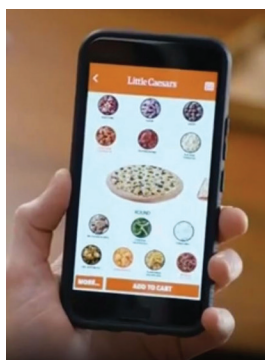
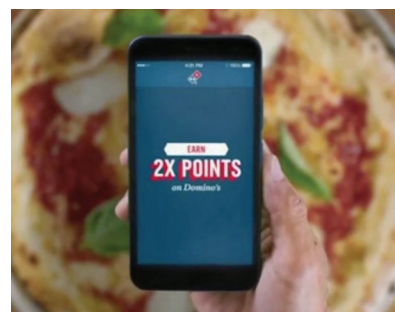
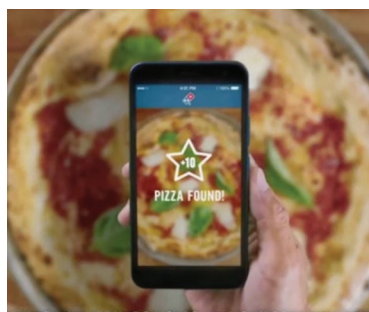
Results



Panera Bread devoted more than one-quarter of its total ad budget to healthy menu items.

Kids' menus represented just 0.6% of all ad spending, and McDonald's (Happy Meal) was responsible for nearly all kids' meal advertising (\$26.3 out of \$27.1 mill in kids' meal ads). Five additional restaurants advertised their kids' meals, but each spent less than 1% of their total advertising budgets on these ads.

Most advertised products. Among individual menu items, Burger King's Impossible Whopper had the most advertising support (\$80 mill). Additional menu items with more than \$40 million in advertising included McDonald's coffee, Burger King Chicken Nuggets, and Taco Bell Nacho Fries. Additional individual menu items that ranked in the top-five most



Domino's, Little Caesars, and Pizza Hut spent the most to advertise their ordering apps and websites on TV.

Table 9. Top fast-food products advertised to preschoolers and children: 2019

Restaurant	Preschoolers (2-5 y)		Children (6-11 y)		Advertised products*
	Avg # of TV ads viewed	Targeted ratio	Avg # of TV ads viewed	Targeted ratio	
McDonald's	65.6	3.00	74.9	3.42	Happy Meal
Domino's	61.2	0.43	57.6	0.40	Restaurant
Burger King	40.9	0.36	37.7	0.33	Lunch/dinner main dishes, including Impossible Whopper, chicken nuggets, Pretzel Bacon King
Little Caesars	30.0	0.39	28.7	0.37	Pizza, including Extra Most Bestest, Pretzel Crust, 5-Meat Feast
McDonald's	27.0	0.38	25.3	0.35	Restaurant
Taco Bell	26.1	0.42	23.0	0.37	Value menu/meal deals, including \$5 Box, Taco Party Pack, and Double Chalupa Box
Domino's	21.3	0.42	20.4	0.40	Digital
Burger King	21.3	0.37	20.1	0.35	Restaurant
Arby's	19.4	0.38	18.9	0.37	Lunch dinner main dishes, including Bourbon BBQ Turkey, Fish Sandwich, Gyro, and Petite Filet Steak Sandwich
Subway	19.4	0.56	18.8	0.55	Lunch/dinner main dishes, including Steak Club, Southwest Chicken Club, and Italian Ciabatta

*Product types with the most advertising, top-three menu items listed
Source: Analysis of 2019 Nielsen data

advertised items for individual fast-food restaurants included ice cream (McDonald's McFlurry, Wendy's Frosty, Sonic, and Dairy Queen Blizzard) and sugary drinks (Sonic, Dunkin', and Starbucks). McDonald's also spent \$24 million to advertise its soft drinks and \$9 million on miscellaneous beverages, but these items did not rank in the top-five for the restaurant.

McDonald's Happy Meal ranked fourth in advertising spending on individual products by the restaurant. However, Happy Meal was responsible for by far the most advertising to preschoolers and children, contributing 8% of all fast-food TV ads viewed by preschoolers and 9.5% of ads viewed by children (see **Table 9**). Sonic's Wacky Pack was the only other kids' meal advertised to preschoolers and children, but they viewed just 0.4 and 0.3 of these ads on average in 2019. Domino's restaurant ads ranked second among all

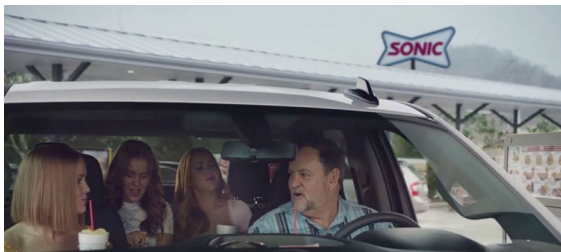
fast-food products advertised to preschoolers and children, representing approximately 7% of all TV ads viewed.

The top-ten products advertised to preschoolers and children also included restaurant-level ads for McDonald's and Burger King, digital ads for Domino's, value menu/meal deals from Taco Bell, and main dish items from Burger King, Little Caesars, Arby's, and Subway.

For teens, McDonald's Happy Meal ads (targeted to preschoolers and children) also had the highest targeted ratio of ads viewed compared to adults. Some fast-food products may also have targeted teens, as evidenced by teen-targeted ratios of 0.40 or greater (see **Table 10**). Products with the highest teen-targeted ratios include Cicis Pizza and Popeyes restaurant ads, Pizza Hut P'Zone (pizza calzone), and Sonic drinks.



Burger King spent \$80 million to advertise its Impossible Whopper meatless burger, the most spent on any individual menu item.



TV ads targeted to teens included Cicis Pizza, Pizza Hut P'Zone, and Sonic drinks.

Table 10. Fast-food products with the highest teen-targeted ratios: 2019*

Restaurant	Teens (12-17 y)		Advertised product
	Avg # of TV ads viewed	Targeted ratio	
Cicis Pizza	8.9	0.53	Restaurant
Pizza Hut	7.2	0.44	P'Zone (lunch/dinner main dish)
Popeyes	18.0	0.44	Restaurant
Sonic	8.5	0.43	Misc drinks
Pizza Hut	12.9	0.42	Restaurant
Burger King	5.4	0.42	Crispy Taco (snack)
Subway	8.1	0.42	Restaurant
Taco Bell	8.6	0.41	Nacho Fries (snack)
Chipotle	7.7	0.41	Restaurant
Dairy Queen	10.5	0.41	Blizzard (sweets)

*Includes products with 5 or more ads viewed and targeted ratios greater than 0.40

Source: Analysis of 2019 Nielsen data

Key findings: Traditional media advertising

- In 2019, 274 fast-food restaurants spent more than \$5 billion in total advertising, an increase of 9% versus 2012.

- TV advertising represented the majority of fast-food ad spending (91%), followed by outdoor (4%), radio (3%), and digital (2%) ads. TV advertising spending increased by 12% compared to 2012, while digital advertising spending increased by 74%.

- In 2019, preschoolers (2-5 years) viewed on average 830.0 TV ads for fast food (2.3 ads-per-day), children (6-11 years) viewed 786.5 ads, and teens (12-17 years) viewed 774.5 ads.
- Although the number of fast-food TV ads viewed by preschoolers, children, and teens declined from 2012 to 2019 (-19%, -33%, and -56%, respectively), these declines were lower than expected given even greater decreases in average TV viewing times from 2013 to 2019 (-44%, -51%, and -62%, respectively).

Advertising by restaurant

- The top-six fast-food companies (McDonald's Corp, Yum! Brands [Taco Bell, Pizza Hut, KFC], Roark Capital Group [Sonic, Arby's Jimmy John's, Hardee's Carl's Jr.], Restaurant Brands Intl [Burger King, Popeyes], Domino's Pizza, and Doctor's Associates [Subway]), were responsible for 66% of all fast-food advertising spending and 71% to 72% of TV ads viewed by all youth in 2019.
- At the restaurant level, McDonald's remained the top fast-food advertiser in 2019, spending \$779 million and accounting for 15% to 16% of ads viewed by preschoolers and children, and 12% of ads viewed by teens.
- Domino's ranked second in advertising spending (\$442 million), while Taco Bell and Burger King each spent over \$300 million. These three restaurants accounted for approximately one-quarter of all fast-food TV ads viewed by preschoolers, children, and teens.
- Only seven of the top fast-food advertisers reduced their advertising spending from 2012 to 2017, including McDonald's (-20%), Subway (-58%), Wendy's (-10%), KFC (-22%), and Pizza Hut (-21%). These restaurants also had among the largest decreases in ads viewed by youth (declines of 25% to 85%).
- Domino's, Burger King, and Taco Bell increased their advertising spending by more than \$100 million from 2012 to 2019. Domino's ad spending more than doubled (+131%) and Burger King and Taco Bell spending increased by 48% and 37%, respectively.

- Despite an overall decline in fast-food TV ad exposure, the number of ads viewed by both preschoolers and children increased for 11 of the 27 top fast-food advertisers, including Sonic (+77% for preschoolers and +37% for children), Domino's (+37% and +9%), and Little Caesars (+22% and +15%). Taco Bell ads viewed by preschoolers increased by 30%, but ads viewed by children did not change.
- Restaurants with the largest declines in ads viewed by preschoolers and children included McDonald's (-54% and -59%), Pizza Hut (-47% and -54%), and Subway (-69% and -76%). TV ads viewed by teens declined for all restaurants, including reductions of 50% or more for McDonald's, Taco Bell, KFC, Pizza Hut, Wendy's, and Subway.

Advertising by menu and product type

- Individual menu items (excluding items on special menus) represented 49% of total ad spending and 50% to 53% of TV ads viewed by all age groups. General restaurant ads contributed another 38% of ad spending and 29% to 30% of TV ads viewed.
- Restaurants devoted 4% of their total ad spending to promote their websites and/or mobile ordering apps, led by Domino's (\$121 mill, 27% of its budget) and Little Caesars (\$32 mill, 18%). Digital offerings also represented 4% of TV ads viewed by all age groups.
- Despite being highly targeted to preschoolers and children, kids' meals accounted for 8% and 10% of fast-food TV ads viewed by these age groups. However, kids' meals represented less than 1% of total ad spending. Kids' meal ads almost exclusively promoted McDonald's Happy Meals, which contributed more than 96% of ad spending and TV ads viewed for kids' meals.
- Value menus and meal bundles were the most widely advertised special menu items (6% of total ad spending and 6-7% of ads viewed), while healthy menu items accounted for just 1% of total ad spending and 1% of TV ads viewed by all youth.

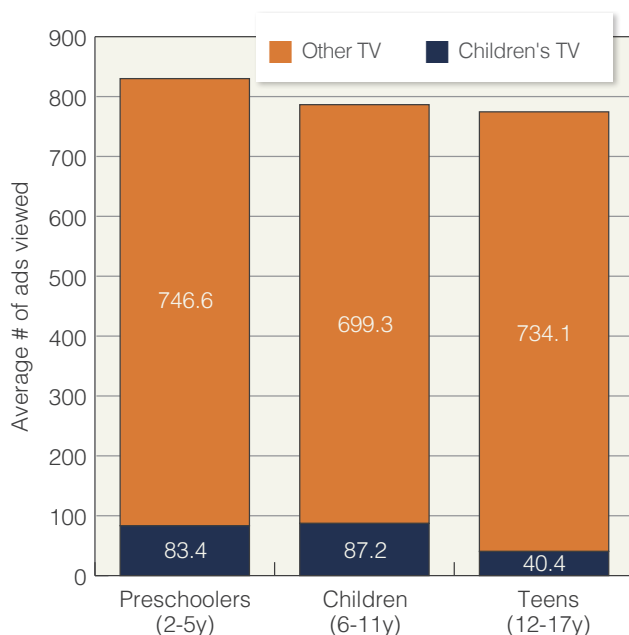
ADVERTISING ON CHILDREN'S TV

Children's TV advertising

Definition	
Children's TV	Television channels aimed primarily at children under 12 years old that accept advertising, including Disney XD, Nickelodeon, NickToons, and Cartoon Network. Preschool children's networks include Nick Jr and Universal Kids.
Other TV	All other (i.e., not children's) television channels.
Children's Food & Beverage Advertising Initiative (CFBAI)	The food industry's voluntary children's advertising self-regulatory program. Participating companies pledge to advertise only foods that meet nutrition standards in child-directed media (including children's TV). ⁴ McDonald's and Burger King are the only fast-food restaurants to participate in CFBAI.

Fast-food restaurants spent \$17.7 million to advertise on children's TV channels in 2019, less than 0.4% of the \$5.0 billion spent on fast-food TV advertising in total. As a result, young people were exposed to the vast majority of fast-food ads on other TV, not children's TV channels (see **Figure 8**). Preschoolers, children, and teens were exposed to 10%, 11%, and 5% of fast-food ads viewed, respectively, on children's TV. Although preschoolers saw more fast-food ads than other age groups in total, children saw more fast-food ads on children's TV than preschoolers saw.

Figure 8. Ads viewed on children's TV and other TV: 2019



Source: Analysis of 2019 Nielsen data

Table 11. Ad spending by restaurant on children's TV: 2019

	Restaurant	Ad spending on children's TV (\$000)	% of total TV ad spending
1	McDonald's	\$14,367.9	2%
2	Jimmy John's	\$1,386.9	4%
3	Sonic	\$694.9	<1%
4	Subway	\$517.0	<1%
5	Cicis Pizza	\$263.0	1%
6	Chick-fil-A	\$180.1	<1%
7	Papa John's	\$157.5	<1%
8	Chipotle	\$106.4	<1%
9	Pizza Hut	\$44.5	<1%
10	Arby's	\$4.1	<1%
11	Taco Bell	\$2.2	<1%
12	Little Caesars	\$2.1	<1%
13	Domino's	\$2.1	<1%
14	Dunkin'	\$1.0	<1%
15	Wendy's	\$1.0	<1%

Source: Analysis of 2019 Nielsen data

Ad spending and exposure by restaurant

Fifteen fast-food restaurants advertised on children's TV in 2019 (see **Table 11**). On average, these restaurants allocated 0.6% of their total TV advertising spending to children's TV. However, spending and ads viewed on children's TV varied widely by restaurant.

McDonald's was the only CFBAI-participating fast-food company to advertise on children's TV. It was also responsible for 81% of total fast-food ad spending on children's TV, 75% of fast-food ads viewed by preschoolers on children's TV, and 81% of ads viewed by children (see **Table 12**). Moreover, more than one-half of all McDonald's ads viewed by preschoolers and children were seen on children's TV.

Table 12. Exposure to ads on children's TV by restaurant: 2016 vs. 2019

Restaurant	Preschoolers (2-5 y)				Children (6-11 y)			
	Avg # of ads viewed		% of total	% change	Avg # of ads viewed		% of total	% change
	2016	2019	2019		2016	2019	2019	
McDonald's	135.3	62.6	51%	-54%	155.9	70.6	55%	-55%
Jimmy John's	**	8.0	57%		**	6.1	54%	
Sonic	6.4	3.3	6%	-48%	6.3	2.0	4%	-68%
Subway	12.1	3.9	12%	-68%	17.0	3.9	12%	-77%
Cicis Pizza	**	2.9	26%		**	1.9	19%	
Chick-fil-A	**	0.9	11%		**	0.6	9%	
Papa John's	3.1	0.5	2%	-84%	0.9	0.5	3%	-44%
Chipotle	**	0.7	8%		**	0.9	11%	
Pizza Hut	0.1	0.6	2%	+600%	0.1	0.7	2%	+700%
Wendy's	8.2	<0.1	<1%	-99%	9.8	<0.1	<1%	-99%

**Data not available, restaurant was not included in 2017 report

Source: Analysis of 2019 Nielsen data; FACTS 2017

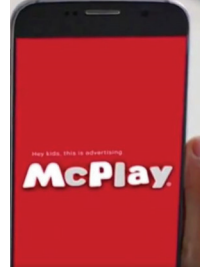
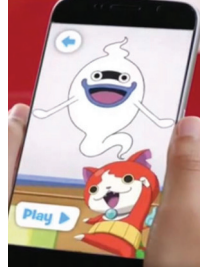
While Jimmy John's was not in the top-25 restaurants for overall ad spending, it had the second-highest ad spending on children's TV. It was also responsible for the second-most ads viewed on children's TV for both preschoolers and children, which represented more than half of all Jimmy John's ads viewed for both age groups. Sonic ranked third in children's TV advertising spending, but a relatively small proportion of Sonic ads were viewed on children's TV.

Although Cicis Pizza, Subway, Chipotle, and Chick-fil-A spent less than Sonic on children's TV advertising, all had higher proportions of ads viewed on children's TV for both age groups (8-26%). Pizza Hut was the only restaurant that increased its advertising on children's TV in 2019 versus 2016. Preschoolers' and children's exposure to ads on children's TV declined for all other restaurants during this time.ⁱⁱⁱ



Cicis Pizza and Jimmy John's ranked among the top-five fast-food restaurants advertised on children's TV.

ⁱⁱⁱ. 2016 data are not available for all restaurants.



McDonald's and Sonic advertised kids' meals on children's TV, while other restaurants primarily advertised the restaurant and/or regular menu items.

Advertised products

Appendix Table 4 details the types of products advertised on children's TV in 2019 by restaurant and the channels on which they appeared. Not surprisingly, preschoolers and children viewed approximately three to six times as many ads for products that appeared on children's TV than adults viewed. However, most of these restaurants did not advertise their kids' meals on children's TV. McDonald's, Jimmy John's, and Sonic were the only three restaurants with kids' meal advertising on children's TV. Kids' meals represented more than 99% of McDonald's advertising spending on children's TV, but only 38% of ad spending by Jimmy John's and 23% by Sonic.

Moreover, all restaurants with advertising on children's TV advertised their regular menu items or the restaurant directly to children on children's TV. Subway regular menu items such as the Southwest Chicken Club and Steak Club, Jimmy John's restaurant and Frenchie sandwich, and Cicis Pizza restaurant ranked in the top-five fast-food products advertised on children's TV. Sonic, Papa John's, and Pizza Hut advertised four or more different types of regular menu items on children's TV.

Advertising by children's TV channel

Nearly all restaurants with child-directed TV ads advertised on Nickelodeon (Nick and NKTNS), which represented 66% of ads viewed by preschoolers on children's TV and 56% of ads viewed by children. CartoonNetwork represented 22% and 29% of children's TV ads viewed, respectively. Notably, McDonald's Happy Meals and restaurant were the only

products advertised on Disney XD (DXD) (11% and 16% of children's TV ads viewed). Disney has established nutrition standards for products that can be advertised directly to children on its children's TV networks and other media properties, the only media company to do so.⁵

Some pizza restaurants also advertised on TV channels aimed at preschoolers: Nick Jr. (NickJr)⁶ and Universal Kids (UKids).⁷ However, they did not advertise kids' meals on these channels. Products advertised included restaurant ads for Cicis Pizza, Little Caesars, and Pizza Hut and regular menu items from Pizza Hut.

Key findings: Advertising on children's TV

- All age groups (preschoolers, children, and teens) were exposed to approximately 90% or more of fast-food ads viewed on other TV, not children's TV channels.
- Fifteen fast-food restaurants advertised on children's TV in 2019, allocating on average 0.6% of their total TV advertising spending to children's TV.
- McDonald's was the only CFBAI-participating fast-food company to advertise on children's TV. It was responsible for 81% of children's TV ad spending and the majority of ads viewed on children's TV by preschoolers (75%) and children (81%).
- McDonald's, Jimmy John's, and Sonic were the only three restaurants that advertised kids' meals on children's TV; all 15 restaurants advertised their regular menu items and/or restaurant directly to children on children's TV.

Results

- Nearly all restaurants with child-directed TV ads advertised on Nickelodeon and/or Cartoon Network (more than 80% of ads viewed by preschoolers and children on children's TV). McDonald's was 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.
- Cicis Pizza, Little Caesars, and Pizza Hut advertised on preschool networks (NickJr and UKids), but they did not advertise kids' meals.

ADVERTISING TO HISPANIC AND BLACK YOUTH

This section documents fast-food advertising targeted to Hispanic and Black preschoolers, children, and teens. Hispanic-targeted advertising includes advertising on Spanish-language TV. Black-targeted advertising includes advertising on Black-targeted TV, as well as disproportionate TV ad exposure by Black relative to White youth on all national TV programming.

Advertising on Spanish-language TV

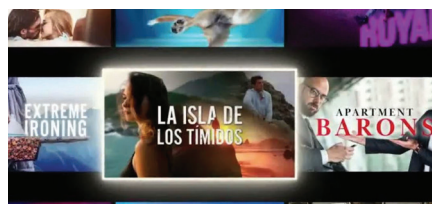
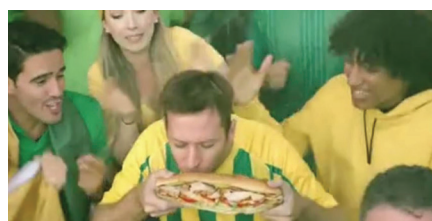
TV advertising to Hispanic youth

Definition

Spanish-language TV	TV programming on Spanish cable and broadcast programming (e.g., Telemundo, Univision). Spanish-language TV ad spending includes advertising expenditures on all Spanish-language TV.
Hispanic youth TV advertising exposure	The average number of TV ads viewed by Hispanic preschoolers (2-5 years), children (6-11 years), and teens (12-17 years) 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.

In 2019, total advertising spending by fast-food restaurants on Spanish-language TV was \$318 million. Spanish-language TV ad spending increased by 33% from 2012 to 2019, in contrast to total TV ad spending, which went up by 9% during the same time period.

As in 2012, Hispanic preschoolers viewed more fast-food ads on Spanish-language TV than any other group of Hispanic youth. They saw an average of 342.3 ads in 2019 (approximately one ad-per-day). Hispanic children viewed on average 251.3 fast-food ads on Spanish-language TV, while Hispanic teens viewed 210.4 ads.



Domino's, Subway, and Taco Bell ranked among the top-five restaurants in ads viewed by Hispanic youth on Spanish-language TV.

Table 13. Changes in Spanish-language TV ad spending by restaurant: 2012 vs. 2019

Spanish-language TV ad spending (\$000)				
Restaurant*	2012	2019	Change	% of TV ad spending in 2019
McDonald's	\$75,519.8	\$66,003.6	-13%	10%
Domino's	\$27,166.3	\$34,871.2	+28%	8%
Subway	\$23,643.3	\$34,140.3	+44%	16%
Wendy's	\$15,641.2	\$31,557.4	+102%	14%
Taco Bell	\$1,168.7	\$25,336.4	+2068%	7%
Chick-fil-A	\$0.0	\$18,213.4	**	18%
KFC	\$13,313.1	\$17,046.8	+28%	9%
Burger King	\$35,971.8	\$16,446.9	-54%	5%
Little Caesars	\$4,397.9	\$15,138.6	+244%	9%
Sonic	\$14,019.9	\$14,346.6	+2%	7%
Pizza Hut	\$9,979.1	\$12,356.3	+24%	7%
Popeyes	\$13,279.6	\$9,507.8	-28%	8%
Dunkin'	\$0.0	\$7,871.0	**	5%
Papa John's	\$1,121.1	\$7,859.6	+601%	6%
Cicis Pizza	\$676.8	\$7,832.5	+1057%	37%
Starbucks	\$3,313.0	\$0.0	**	0%
Total	\$239,216.2	\$318,528.3	33%	9%

Shading indicates a higher-than-average percentage of TV advertising spending on Spanish-language TV in 2019

*One additional restaurant (El Pollo Loco) spent <\$1,000 on Spanish-language TV ads

**Restaurant did not advertise on Spanish-language TV in either 2012 or 2019

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013; Targeted Marketing Rudd Report 2019

From 2012 to 2019, there was a slight increase in number of Spanish-language TV ads viewed by preschoolers (+2%) and children (+7%) and a small decrease for Hispanic teens who saw 3% fewer of these ads. These small changes differ from large decreases in total fast-food ads viewed by preschoolers, children, and teens on all other TV during the same time (-19%, -33%, and -56%, respectively).

Spending on Spanish-language TV advertising by restaurant

In 2019, 15 of the 27 top fast-food advertisers advertised on Spanish-language TV (see **Table 13**). Two of these restaurants (Dunkin' and Chick-fil-A) did not advertise on Spanish-language TV in 2012. Starbucks was the only top fast-food advertiser to advertise on Spanish-language TV in 2012 but not in 2019.

On average, fast-food advertisers on Spanish-language TV allocated 9% of their total TV ad budgets to Spanish-language TV in 2019. As in total ad spending, McDonald's and Domino's ranked first and second in Spanish-language TV ads, while Taco Bell ranked fifth in Spanish-language advertising (compared to third in total ad spending). A few restaurants allocated a disproportionately high percentage of their TV advertising spending to Spanish-language TV. Cicis

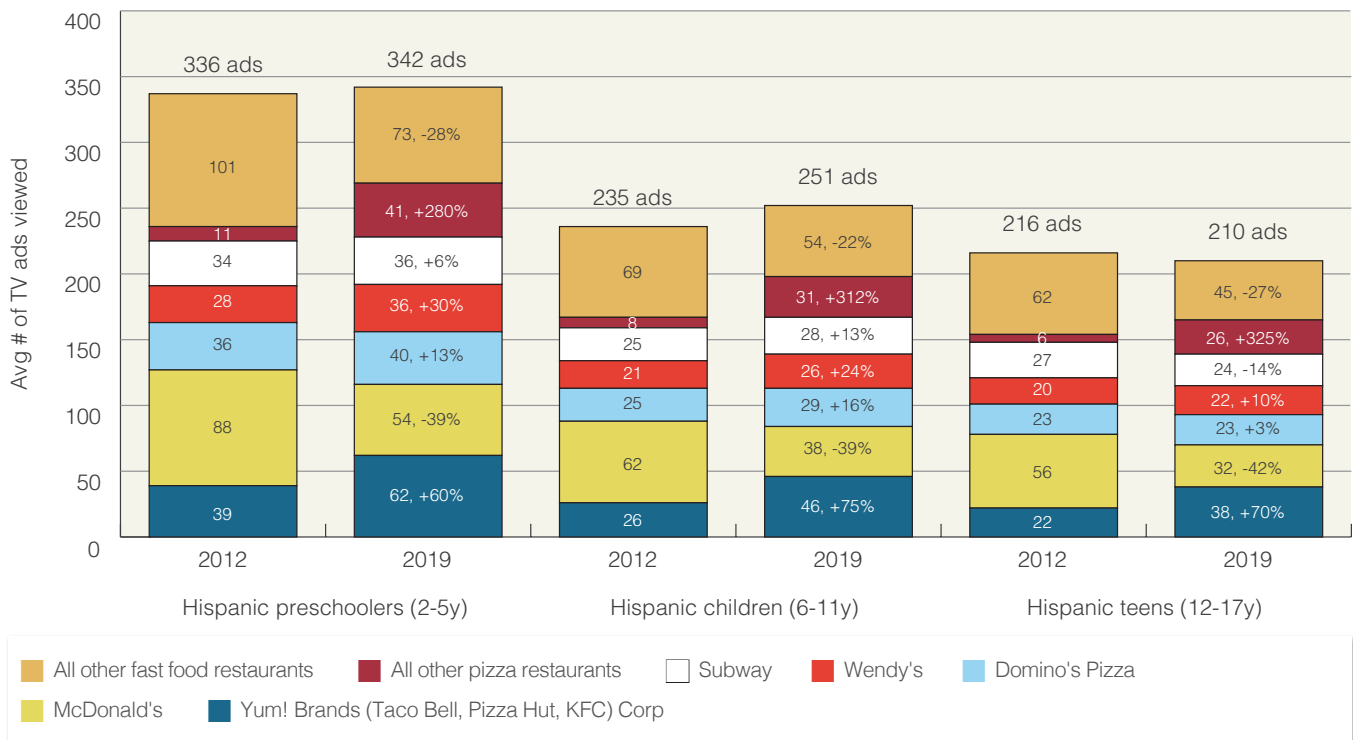
Pizza devoted more than one-third of its budget to Spanish-language (more than any other restaurant), while Subway, Wendy's, and Chick-fil-A allocated 14% to 18% of their TV advertising to Spanish-language TV.

Twelve of the 15 restaurants increased their Spanish-language TV ad spending from 2012 to 2019. Taco Bell and Cicis Pizza had the greatest increases 10 to 20 times, while Little Caesars and Papa John's also saw large increases (244% and 601%, respectively). Only Burger King, Popeyes, and McDonald's decreased their Spanish-language TV advertising spending during this time. Despite these declines, McDonald's maintained its position as the top Spanish-language TV advertiser in 2019, but Burger King dropped from second to eighth in Spanish-language ad spending.

Hispanic youth exposure to Spanish-language TV ads by restaurant

The five restaurants with the most Spanish-language TV advertising spending (McDonald's, Domino's, Subway, Wendy's, and Taco Bell) also led in Spanish-language TV ads viewed by Hispanic youth, accounting for 55% of the total (see **Ranking Table 4**).

Most changes in Spanish-language TV ads viewed by Hispanic youth from 2012 to 2019 for individual restaurants were

Figure 9. Changes in Hispanic youth exposure to ads on Spanish-language TV: 2012 vs. 2019

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

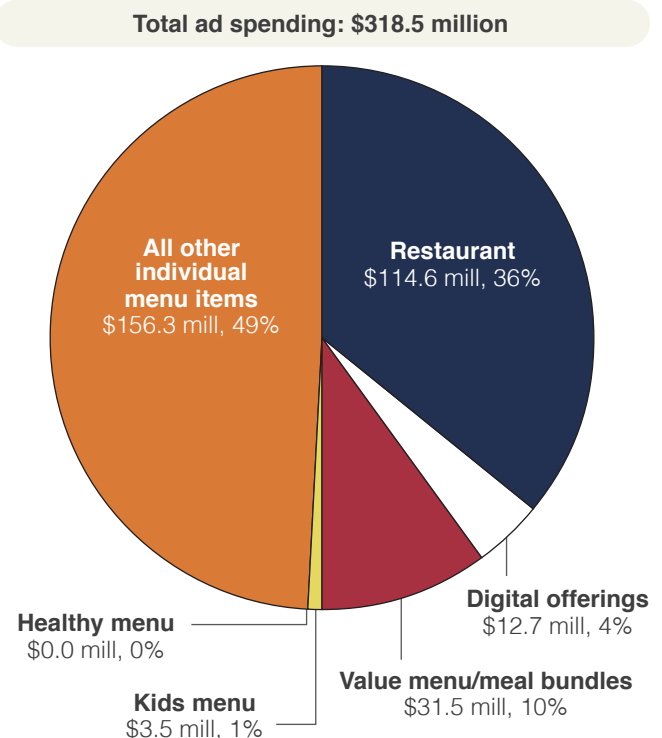
consistent with changes in spending on Spanish-language TV (see **Figure 9** and **Ranking Table 4**). The number of ads viewed by Hispanic youth across all age groups increased for most restaurants in 2019, with the biggest increases for Taco Bell (1150% or more), Papa John's (577% or more), Cicis Pizza (571% or more), and Little Caesars (147% or more).

McDonald's, Burger King, and Popeyes were the only restaurants with a decrease in ads viewed by Hispanic youth on Spanish-language TV between 2012 and 2019. Of note, in 2012 McDonald's was responsible for approximately one-quarter of fast-food ads viewed by Hispanic youth, but this proportion decreased significantly in 2019 to approximately 15%.

Advertising by product and menu type

Restaurants spent the majority of their Spanish-language TV advertising budgets on individual menu items and restaurant-level ads (see **Figure 10**), consistent with restaurants' total TV advertising spending. However, restaurants devoted somewhat more Spanish-language TV advertising to value menus/meal bundles than total TV advertising (10% vs. 6%). Although restaurants spent approximately 1% of their total ad budgets on healthy menu items, there were no ads for healthy menu items on Spanish-language TV in 2019.

Appendix Table 5 presents the fast-food products with the most advertising on Spanish-language TV in 2019. In addition

Figure 10. Spanish-language TV ad spending by product and menu type: 2019

Source: Analysis of 2019 Nielsen data

to general restaurant ads for several restaurants (Domino's, McDonald's, Pizza Hut, Wendy's, Popeye's, Chick-fil-A, and Taco Bell), Subway sandwiches, Little Caesars pizza, McDonald's Grand McExtreme Bacon Burger, and Taco Bell's \$5 Box combo also appeared at the top of the list of fast-food products advertised on Spanish-language TV.

McDonald's Happy Meals were the only kids' meals advertised on Spanish-language TV in 2019. However, these ads primarily targeted parents as Hispanic adults (18-49 years) were more likely to see these ads than were Hispanic preschoolers or children (3.6 vs. 2.9 and 2.0 ads viewed, respectively).

TV advertising targeted to Black youth

TV advertising to Black youth

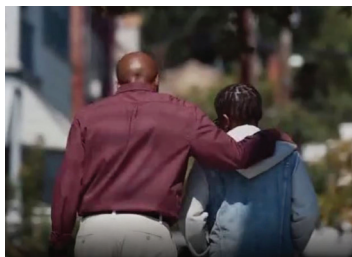
Definitions

Black-targeted TV	TV channels where more than 50% of viewers self-identify as Black, including BET, VH1, and TV1. Black-targeted TV spending includes advertising expenditures on all Black-targeted TV.
Black youth TV ad exposure	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). ^{iv}
Black-targeted ratios	A measure of relative exposure to TV ads by Black versus White youth, calculated by dividing GRPs for Black preschoolers, children, or teens by GRPs for White preschoolers, children, or teens.

Our analysis of advertising targeted to Black youth includes advertising spending on Black-targeted TV channels, as well as comparisons of exposure to fast-food ads by Black versus White youth on all national TV programming. Disproportionate exposure by Black children and teens on national TV indicates that fast-food restaurants placed their ads during TV programming that was viewed by relatively more Black youth compared to White youth.⁸

Ad spending on Black-targeted TV by restaurant

In 2019, 23 restaurants spent \$99 million to advertise on Black-targeted TV, including 22 of the 27 top fast-food advertisers plus Captain D's (see **Table 14**). On average, these restaurants spent 3% of their national TV ad spending budgets on Black-targeted TV.



McDonald's increased its ad spending on Black-targeted TV by 57% from 2017 to 2019.

^{iv} In 2019, 90% of all fast-food restaurant ads viewed by youth appeared on national TV.

Table 14. Black-targeted TV ad spending: 2019

Restaurant	Advertising spending on Black-targeted TV (\$000)			% of TV ad spending	
	2017	2019	Change	2017	2019
Domino's	\$12,027	\$15,758.9	+31%	4%	4%
McDonald's	\$7,421	\$11,640.1	+57%	1%	3%
Burger King	\$9,564	\$10,355.1	+8%	3%	3%
Taco Bell	\$12,835	\$9,992.6	-22%	4%	3%
Wendy's	\$8,426	\$7,072.3	-16%	4%	3%
Little Caesars	\$5,147	\$6,850.0	+33%	3%	4%
Popeyes	**	\$6,262.7			7%
Pizza Hut	\$5,421	\$4,331.7	-20%	3%	2%
KFC	\$3,083	\$4,155.0	+35%	2%	2%
Sonic	\$4,520	\$3,699.0	-18%	2%	3%
Subway	\$5,145	\$3,114.1	-39%	1%	2%
Papa John's	**	\$2,882.8			3%
Cicis Pizza	**	\$2,495.1			12%
Arby's	\$8,004	\$1,814.3	-77%	5%	2%
Dunkin'	**	\$1,771.7			2%
Dairy Queen	**	\$1,446.1			2%
Jimmy John's	**	\$1,395.2			4%
Captain D's*	**	\$1,325.3			9%
Chipotle	**	\$884.5			1%
Zaxby's	**	\$656.3			4%
Chick-fil-A	**	\$637.8			1%
Panera Bread	**	\$429.8			1%
Starbucks	**	\$9.7			<1%
Total		\$98,980.4			3%

*Restaurant is not included in the list of 27 top fast-food advertisers

**Restaurant was not a top-advertiser in the Targeted Marketing Rudd Report, 2017 data are not available

Shading indicates higher-than-average percentage of national TV advertising spent on Black-targeted TV

Source: Analysis of 2019 Nielsen data; Targeted Marketing Rudd Report 2019

The top-four advertisers—Domino's, McDonald's, Burger King, and Taco Bell—accounted for one-half of all ad spending on Black-targeted TV. These four restaurants also spent the most on total TV advertising. However, Domino's ranked first in ad spending on Black-targeted TV, while McDonald's ranked first in total TV ad spending.

A few restaurants dedicated a higher proportion of their ad dollars to Black-targeted TV. Cicis Pizza dedicated 12% of its total TV ad spending to Black-targeted TV and ranked 13th in ad spending on Black-targeted TV (it did not rank in the top-25 for total ad spending). Captain D's and Popeyes also exceeded the average (9% and 7%, respectively).

Compared to 2017, Domino's, McDonald's, Burger King, Little Caesars, and KFC increased their advertising spending on Black-targeted TV. McDonald's increased its spending by more than 50% and moved from number-six in Black-targeted TV ad spending in 2017 to number-two in 2019. In contrast,

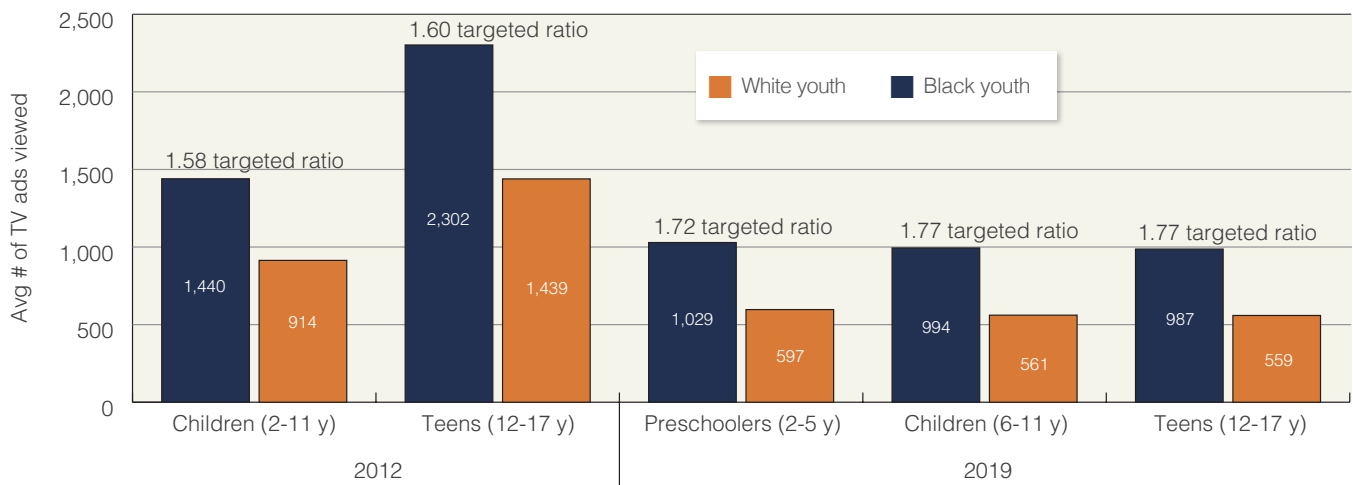
Taco Bell declined from first in 2017 to fourth in 2019, with a 22% decline in Black-targeted TV advertising spending.

Black youth ad exposure and TV viewing

On all national TV in 2019, Black preschoolers (2-5 years) and Black children (6-11 years) saw on average 1,029.1 and 993.9 fast-food ads, respectively, or nearly 3 ads-per-day. Black teens (12-17 years) viewed 986.9 fast-food ads. Compared to their White peers, Black preschoolers viewed 72% more fast-food ads, and Black children and teens viewed 77% more ads (see **Figure 11**).

Moreover, disparities in exposure by Black versus White youth have increased compared to 2012. From 2012 to 2019, total exposure to TV ads for fast food by Black preschoolers and children decreased by 30%,^v while Black teens' exposure decreased by 57%. In comparison, declines in fast-food ad

^v 2012 data combined preschoolers and children (ages 2-11), so we averaged exposure for preschoolers and children in 2019 to report changes in exposure.

Figure 11. Differences in TV ad exposure for Black vs. White youth: 2012 vs. 2019

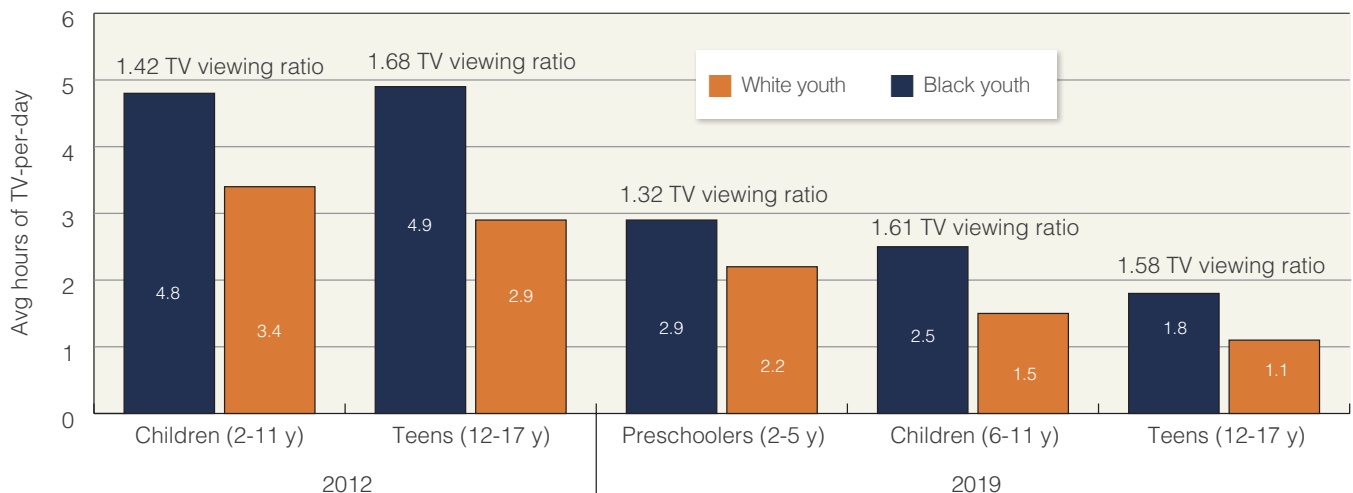
Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

exposure were somewhat higher for White youth, including a 37% decline for White preschoolers and children and a 61% decline for White teens.

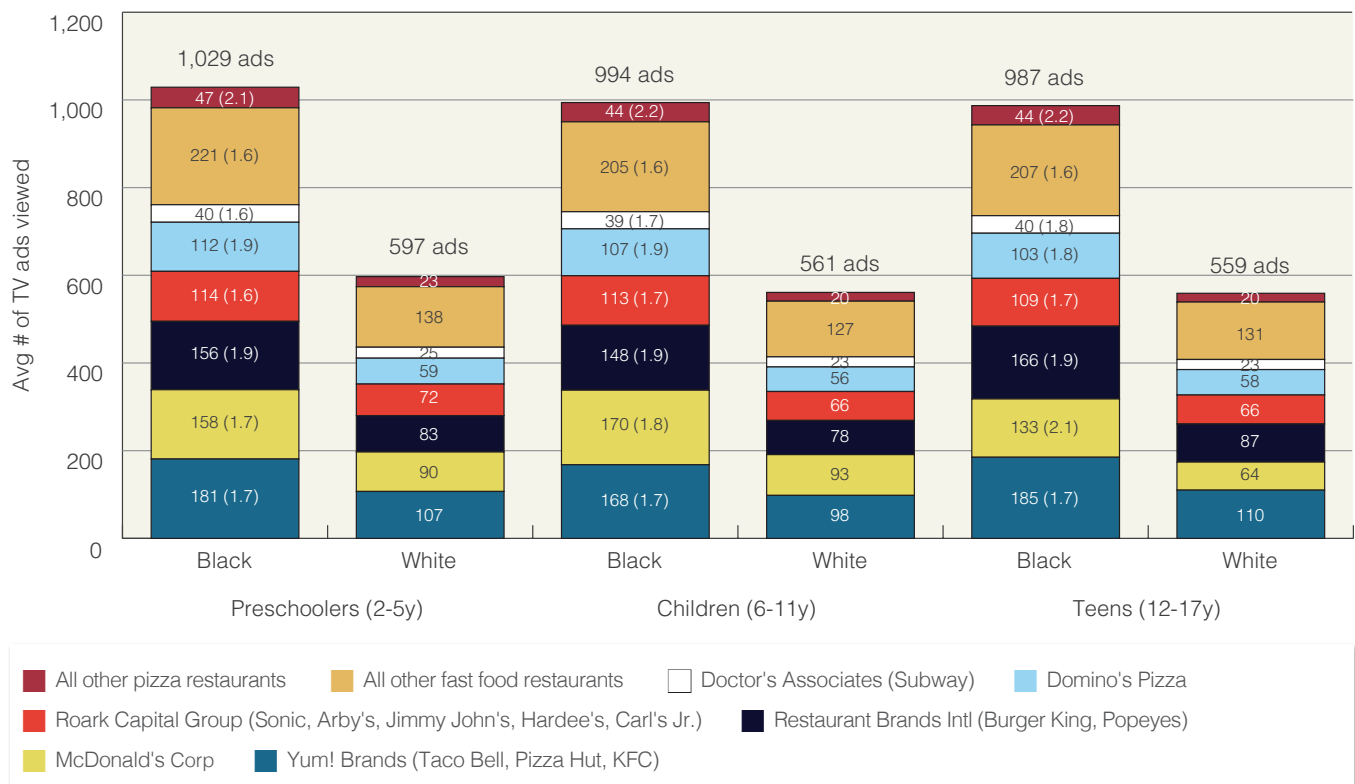
Differences between ads viewed by Black and White youth can be explained partially by differences in the average amount of time they spent watching TV (see **Figure 12**). In 2019, on average Black preschoolers watched 32% more hours of TV than White preschoolers watched; differences were greater between Black and White children (61%) and teens (58%). However, differences in ad exposure in 2019

across all age groups were higher than expected given these differences in TV viewing times.

Furthermore, decreases in fast-food TV ads viewed by Black youth from 2012 to 2019 were less than expected given decreases in time spent viewing TV. For example, Black preschoolers and children viewed 30% fewer ads, compared to a 45% reduction in TV viewing time. Similarly, Black teens' exposure to fast-food ads decreased by 57%, but their TV viewing time declined by 64% over the same time period.

Figure 12. Differences in TV viewing time for Black vs. White youth: 2012 and 2019

Source: Analysis of 2019 Nielsen data; Fast Food FACTS 2013

Figure 13. Disparities in TV ad exposure between Black and White youth by company: 2019

Numbers in parentheses are targeted ratios of ads viewed by Black youth vs. White youth
Source: Analysis of 2019 Nielsen data

Black youth exposure to TV ads by company and restaurant

In 2019, the top-six fast-food companies were also responsible for 73% to 75% of fast-food ads viewed by Black youth (see **Figure 13**). Some companies advertised disproportionately more to Black youth. Black preschoolers, children, and teens saw approximately 90% or more ads for Restaurant Brands Intl (Burger King and Popeyes), Domino's Pizza, and other pizza restaurants (Cicis Pizza and Papa John's) compared to their White peers. Black teens saw more than twice as many ads for McDonald's compared to White teens.

The ten restaurants with the most TV advertising to all youth also were responsible for the most advertising to Black youth.^{vi} Four restaurants—McDonald's, Burger King, Domino's, and Taco Bell—contributed 46% of ads viewed by preschoolers and teens and 47% of ads viewed by children (see **Ranking Tables 5 and 6**). Six restaurants—Sonic, Little Caesars, Wendy's, KFC, Popeyes, Pizza Hut, and Subway—contributed another one-third of ads viewed by Black preschoolers and children (34%) and Black teens (35%).

Despite a 30% overall decline in fast-food ad exposure from 2012 to 2019, Black children and preschoolers' exposure to TV ads increased by 4% to 884% for eight restaurants, including Domino's (12%), Taco Bell (4%), Little Caesars (23%), and Sonic (44%). Conversely, declines in ads viewed by Black preschoolers and children exceeded 50% for McDonald's, Wendy's, Pizza Hut, and Subway. These changes were comparable to changes in ads viewed by all preschoolers and children for individual restaurants.

Most restaurant-level changes in ads viewed by Black teens from 2012 to 2019 were also consistent with declines in ads viewed by teens overall. Black teens' ad exposure decreased across all restaurants that had advertising in 2012 except Dunkin', Panera Bread, and Chick-fil-A. Notably, Black teens viewed 54% more Dunkin' ads in 2019 than in 2012, compared to a 17% decline in ads viewed by all youth.

Relative exposure to fast-food TV ads by Black versus White youth also varied widely by restaurant. Disparities were lowest for Chick-fil-A, with comparable numbers of ads viewed by Black and White preschoolers (targeted ratio:1.09), children

vi. Checkers/Rally's, Hardee's, Jack In The Box, Carl's Jr., and Culver's are not reported. They advertised on spot TV only so Black and White youth exposure are not available for these restaurants.



@Deej_Manuel freestyled about the \$5 Popeyes Shrimp Tackle Box.



Black children and/or teens saw 90% more ads for Popeyes, Papa John's, and Burger King compared to White youth.

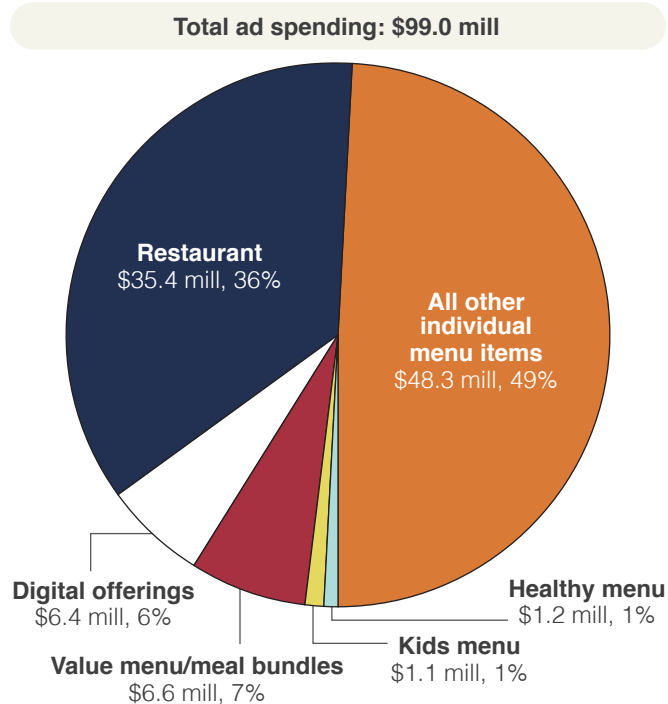
(1.16), and teens (1.02). Arby's, Dairy Queen, and Starbucks also had targeted ratios of 1.45 or less for Black versus White children and teens.

In contrast, disparities in exposure by preschoolers and/or children were 90% or higher for six restaurants (Burger King, Domino's, Popeyes, Papa John's, Cicis Pizza, and Zaxby's). Among teens, disparities in exposure exceeded 90% for four restaurants (McDonald's, Popeyes, Papa John's, and Cicis Pizza).

Products targeted to Black youth

The proportion of ad dollars allocated to product types on Black-targeted TV were similar to those on all national TV, with a few exceptions (see **Figure 14**). Value menus/meal bundles represented a somewhat higher proportion of Black-targeted TV spending (7% vs. 6% on all national TV), as did digital offerings (6% vs. 5%). Other regular menu items were also advertised relatively more on Black-targeted TV (49% vs. 48%), while restaurant-level ads represented a lower proportion of Black-targeted TV spending (36% vs. 39%). Healthy menus and kids' menus each represented just 1% of total spending on Black-targeted and all national TV channels.

Figure 14. Black-targeted TV ad spending by product type: 2019



Source: Analysis of 2019 Nielsen data

Products with disproportionately high ratios of ads viewed by Black children and/or teens included soft drinks, Happy Meals, burgers, Cheesy Bacon Fries, coffee, and restaurant-level ads from McDonald's (see **Appendix Table 6**). Black children and teens also saw approximately twice as many ads for Burger King's Crispy Taco, Cheesy Tots, and breakfast items. Menu items from Papa John's, Popeyes, and Wendy's, as well as PizzaHut.com, also appeared on this list.

Key findings: Advertising targeted to Hispanic and Black youth

Spanish-language TV advertising

- In 2019, 16 fast-food restaurants spent \$318 million to advertise on Spanish-language TV, an increase of 33% over 2012.
- A few restaurants allocated a higher-than-average proportion of their TV ad spending to Spanish language TV, including McDonald's (10%), Subway (16%), Wendy's (14%), Chick-fil-A (18%), and Cicis Pizza (37%), compared to 9% on average.
- Overall, there was a slight increase in number of Spanish-language TV ads viewed by Hispanic preschoolers (+2%) and children (+7%) from 2012 to 2019 and a small decline for Hispanic teens (-3%), in contrast to large decreases in fast-food ads viewed by preschoolers, children, and teens in total.
- McDonald's was responsible for more than 15% of Spanish-language TV ads viewed by Hispanic youth on Spanish-language TV, while Domino's, Subway, and Wendy's were responsible for another 33%.
- The number of ads viewed by Hispanic youth on Spanish-language TV increased for most restaurants across all age groups in 2019, including increases of 150% or more for Taco Bell, Papa John's, Cicis Pizza, and Little Caesars.
- McDonald's, Burger King, and Popeyes were the only restaurants to decrease ads viewed by Hispanic youth on Spanish-language TV between 2012 and 2019.
- Restaurants devoted 10% of spending on Spanish-language TV to value menus/meal bundles, compared to 6% of total advertising spending, but there were no healthy menu items 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), but they were primarily targeted to adults.

Advertising targeting Black youth

- In 2019, 23 fast-food restaurants spent \$99 million to advertise on Black-targeted TV, averaging 3% of their national TV ad budgets. Domino's ranked first in ad spending on Black-targeted TV, followed by McDonald's, Burger King, and Taco Bell.
- Popeye's, Captain D's, and Cicis Pizza dedicated a higher proportion of their national TV ad spending to Black-targeted TV (7-12%), compared to 3% for all restaurants on average.
- In 2019, Black preschoolers, children, and teens viewed approximately 75% more fast-food ads on all TV 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 substantial decreases in average TV viewing times during the same period (-45% and -64%, respectively).
- McDonald's, Burger King, Domino's, and Taco Bell were responsible for 46% to 47% of all fast-food ads viewed by Black youth, a somewhat higher percentage compared to fast-food ads viewed by all youth.
- From 2012 to 2019, ad exposure by Black preschoolers and children increased for nine of the top restaurants, including Domino's (+12%), Taco Bell (+4%), Sonic (+44%), Little Caesars (+23%), Popeye's (+16%), Dairy Queen (+4%), Dunkin' (+191%), Panera Bread (+884%), and Chick-fil-A (+165%).
- Healthy menu items and kids' meals each represented just 1% of total spending on Black-targeted TV, comparable to the proportion spent on all TV. However, value menu/meal bundles and digital represented a somewhat higher proportion of ad spending on Black-targeted TV (7% vs. 6%).
- McDonald's, Burger King, Papa John's, Popeye's, Wendy's and Pizza Hut targeted ads for some menu items to Black youth, including soft drinks, snacks, burgers, french fries, pizza, and kids' meals. Black youth saw at least twice as many ads for these menu items compared to White youth.