

# Rudd Report

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## Food advertising targeted to Hispanic and Black youth: Contributing to health disparities



## **AUTHORS**

### **Rudd Center for Food Policy & Obesity** University of Connecticut

Jennifer L. Harris, PhD, MBA  
*Director of Marketing Initiatives, Rudd Center for Food Policy & Obesity*  
*Associate Professor, Allied Health Sciences*

Catherine Shehan, MS  
*Research Associate, Rudd Center for Food Policy & Obesity*

Renee Gross, JD  
*Coordinator of Legal Initiatives, Rudd Center for Food Policy & Obesity*

### **AACORN** University of Pennsylvania Perelman School of Medicine

Shiriki Kumanyika, PhD, MPH  
*Emeritus Professor of Epidemiology*  
*Founder and Chair, AACORN*

Vikki Lassiter, MS  
*Executive Director, AACORN*

### **Salud America!**

University of Texas Health Science Center at San Antonio

Amelie G. Ramirez, DrPH, MPH  
*Director, Institute for Health Promotion Research*  
*Professor, Department of Epidemiology and Biostatistics.*





Kipling Gallion, MA  
*Deputy Director, Salud America!*  
*Deputy Director, Institute for Health Promotion Research*

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## Executive Summary

The findings in this report support public health concerns that marketing of unhealthy foods and beverages targeted to communities of color contributes to health disparities.

Previous research has shown that Black and Hispanic youth receive a “double dose” of food marketing that promotes products high in sugar, saturated fat, and sodium. Compared to White non-Hispanic youth, they are exposed to more food advertising in the media, as well as more marketing messages in their communities. This exposure contributes to poor diet, including greater consumption of fast food and sugary drinks, and contributes to higher rates of obesity and other diet-related diseases in Black and Hispanic communities.

Public health experts have raised concerns that companies also may target marketing for nutritionally poor foods directly to Black and Hispanic youth, exacerbating health disparities. This research examined these targeted marketing practices. To identify targeted marketing for food and beverage products, researchers analyzed companies’ public statements about their marketing, including traditional media advertising, product development, sponsorships, and philanthropic programs. They also conducted a comprehensive analysis of the amount of TV food advertising specifically targeted to and/or disproportionately viewed by Hispanic and Black consumers; youths’ exposure to this advertising; the brands and product categories promoted most often; and comparisons to exposure by White non-Hispanic youth. These findings will help

identify opportunities to encourage companies to reduce disparities in food marketing aimed at youth of color.

### METHODS

Researchers examined 26 restaurant, food, and beverage companies, including all companies with \$100 million or more in advertising spending in 2013 ( $n=23$ ) and all companies participating in the Children’s Food and Beverage Advertising Initiative (CFBAI) industry self-regulatory program as of December 2014 ( $n=17$ ). Systematic searches of marketing trade press and reports, companies’ annual reports, and press releases from 2012 to 2014 identified statements about companies’ targeted marketing practices. To identify brands with TV advertising targeted to Black and Hispanic audiences, researchers utilized syndicated market research data from Nielsen. These data quantified media spending by brand, including advertising spending on Spanish-language and Black-targeted TV channels, as well as exposure to TV advertising by Black, Hispanic, and all children and adolescents in 2013. In addition to company-level advertising data, researchers also examined data for the 267 most-advertised brands (i.e. brands spending \$4.5 million or more in total advertising across all media and \$500,000 or more in TV advertising). Hispanic-targeted brands with advertising on Spanish-language TV were identified. In addition, Black-targeted brands included those with substantial advertising on TV networks with a high proportion of Black individuals in the audience and/or whose ads were viewed disproportionately more by Black teens relative to White teens. Youth-targeted brands that advertised disproportionately more to children and/or teens compared with adults also were identified.

### RESULTS

The companies in this analysis made public statements that identified three primary reasons for their targeted marketing strategies: business opportunity, cultural relevance, and corporate responsibility. Statements about targeted marketing primarily focused on the growing and increasingly important Hispanic consumer. Some beverage companies also noted their strategy to reach “multicultural” millennials through sponsorships and events. In addition, many of the large packaged-food companies maintained Spanish-language versions of their websites, and one fast-food company (McDonald’s) offered separate websites for Black, Hispanic, and Asian American consumers.

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The Nielsen data confirmed that most of the companies analyzed targeted some advertising to Hispanic consumers. Overall, the 26 companies in this analysis spent \$675 million in food-related advertising on Spanish-language TV, 82% of all food advertising on this medium. Seven companies spent \$48 million or more in Spanish-language advertising, including McDonald's (\$75 million), Mars (\$72 million) and General Mills (\$66 million), while just four companies did not advertise on Spanish-language TV at all (Ferrero U.S.A., Inc., Roark Capital, dineEquity, and Dannon). Seven companies allocated more than 10% of their TV advertising budgets to Spanish-language programming (Post Foods, Dr Pepper Snapple Group, Wendy's, 3G Capital, Kraft Foods, and Kellogg). Mars spent 23.5% of its TV advertising budget on Spanish-language television, the highest proportion of any company in our analysis.

In contrast, just three companies (Coca-Cola, General Mills, and McDonald's) spoke publicly about marketing targeted directly to Black consumers. However, the Nielsen advertising data indicated that most companies in this analysis placed some advertising on Black-targeted TV networks, totaling \$161 million and representing three-quarters of all food-related advertising on these networks. Only Dannon and ConAgra Foods spent less than \$100,000 to advertise on Black-targeted TV network. Black-targeted TV advertising spending was considerably lower than Spanish-language TV spending, but five companies spent more than \$10 million in advertising on primarily Black networks. The Hershey Company spent the most (\$23.0 million), followed by PepsiCo, Mars, Yum! Brands, and Kellogg. In addition, four companies spent more than 4% of their TV advertising budgets on Black-targeted TV (compared with 2% on average for all companies in this analysis): Ferrero, Unilever, Dr Pepper Snapple Group, and Hershey.

### Targeted brands and categories

Of the 267 most-advertised brands from the 26 companies analyzed, 92 (34%) Hispanic-targeted brands devoted more than \$100,000 in advertising on Spanish-language TV. Three of these brands did not advertise

at all on English-language TV (7Up, Kraft Mayonnaise, and Fuze Iced Tea). In addition, 148 brands (55%) spent more than \$100,000 on TV networks with a high proportion of Black individuals in the audience, and 90 of these brands (34%) were designated as Black-targeted because they spent more than \$500,000 on Black-targeted networks or had a high ratio of Black versus White teen exposure. There was also substantial overlap, with 44 brands (16%) targeting both Black and Hispanic consumers. Hispanic-targeted brands contributed 96% of food-related advertising on Spanish-language TV, and Black-targeted brands produced 87% of food advertising on Black-targeted TV networks.

Fast-food and other restaurants spent the most on advertising in targeted media, totaling \$244 million in Spanish-language TV and \$61 million in Black-targeted TV. All restaurant companies targeted at least one of their brands to Black consumers, and all but two advertised on Spanish-language TV. Restaurants represented almost 37% of all food-related advertising on these networks, although restaurants' share of food-related advertising on all types of television programming was higher (43%). Wendy's, Olive Garden, and Burger King devoted a relatively high 11% to 12% of their TV advertising spending to Spanish-language advertising (compared to 8.5% on average for the brands in this analysis), and McDonald's devoted 10%. Wendy's also devoted a higher share of its TV advertising budget to Black-targeted TV at 3.7% compared with other restaurant brands.

Compared with other food and beverage categories, candy and gum/mint brands disproportionately targeted their advertising to both Black and Hispanic consumers. Candy brands represented 9.4% of all TV advertising spending for food-related brands, but this category contributed 13.3% of food-related spending on Spanish-language TV and 18.3% of spending on Black-targeted TV. Of the candy brands examined, 78% targeted Black consumers and 31% targeted Hispanics. M&Ms, Snickers, Hershey's candy bar, and Twix ranked in the top-10 Hispanic-targeted packaged food brands (excluding restaurants) with \$12.8 million to \$17 million in Spanish-language advertising. On Black-targeted TV, Reese's Peanut Butter Cups, M&Ms, Hershey's Kisses, and Hershey's candy bar ranked in the top-10 packaged food brands, with \$2 to \$2.5 million in Black-targeted spending.

In other packaged food categories, there was greater variation in advertising targeted to Hispanic and Black consumers. Of note, just two fruit brands qualified for this analysis (i.e., they spent \$4.5 million or more in advertising); and neither appeared to target Black or Hispanic consumers. None of the vegetable brands in this analysis were targeted. Juice, plain water, yogurt, and other dairy brands also were less likely to be targeted to Black or Hispanic consumers. Just two fruit juice brands (V8 V-Fusion and Tropicana Farmstand) and four dairy brands (Yoplait Light, Yoplait, Philadelphia Cream

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Cheese, and Kraft Singles) advertised on Spanish-language TV, while only one yogurt (Yoplait Light) was targeted to Black consumers. Together, brands in these generally healthier categories represented 6% of all TV advertising spending, but just 4% of Spanish-language advertising spending and less than 1% of advertising spending on Black-targeted TV.

In contrast, some categories dedicated a disproportionately high percentage of their overall TV advertising budgets to Spanish-language TV: nearly 12% of TV advertising spending for cereal and food preparation products and almost 17% of spending on regular soda was devoted to Spanish-language television (compared with 8.6% for all packaged-food brands). Following restaurants and candy, cereal, regular soda, and prepared meal brands had the highest total spending on Spanish-language TV. Individual brands ranking among the top packaged foods for Spanish-language TV advertising included Cheerios, Coca-Cola Classic and 7Up regular sodas, Kraft Macaroni & Cheese, Kraft Singles Cheese, and Cinnamon Toast Crunch Cereal. On the other hand, sweet and savory snacks represented a disproportionately high proportion (14%) of Black-targeted TV spending (compared with 8% of overall TV spending), and brands in snack categories also spent the most in this medium after restaurants and candy. Other top packaged food brands (with \$1.8 to \$4.2 million in advertising spending on Black-targeted TV) included Pop Tarts, Tyson Frozen Entrees, Gatorade, Lay's Potato Chips, Coca-Cola Classic, and Tostitos Cantina Tortilla Chips.

### Brands targeting children and teens

In addition, 48 brands (18% of all brands) in this analysis advertised disproportionately more to children and/or adolescents compared with adults. These youth-targeted brands also were significantly more likely to target Black and/or Hispanic consumers. Youth-targeted brands with the highest advertising spending on Spanish-language TV (at \$10 million or more) included McDonald's, Twix

candy bar, Cinnamon Toast Crunch cereal, and Orbit chewing gum. Youth-targeted brands spending \$2.4 million or more in advertising on Black-targeted TV included McDonald's, Pop Tarts, Tyson Frozen Entrees, and Gatorade.

Overall, Black children and teens viewed 70% more food-related TV ads compared with their White peers, averaging 13.3 ads per day for Black children and 17.5 ads per day for Black teens (5.6 and 7.5 more ads per day compared with White children and teens). This disparity in ads viewed was even greater for product categories with the most Black-targeted products. Black children and teens saw at least twice as many ads for gum/mints, soda, and other sugary drinks compared with White children and teens, and Black children saw 2.1 times as many candy and regular soda ads and 2.3 times as many gum/mint ads. Fast-food and other restaurants comprised almost one-third of food-related ads viewed by Black and White youth in all age groups, while candy, gum/mints, snacks, soda, and other sugary drinks represented another 32% of food ads viewed by Black children and 39% of ads viewed by Black teens.

On Spanish-language TV, Hispanic children viewed on average 2.2 food, beverage, and restaurant ads per day and Hispanic teens averaged 1.8 ads per day in addition to advertising viewed on English-language TV. Fast-food and other restaurants comprised slightly more than one-third of Spanish-language ads viewed. Candy and gum/mints comprised another 24% to 25% of Spanish-language ads viewed by Hispanic children and teens, compared with just 13% and 19% of food-related ads viewed by all children on English-language TV. The distribution of ads viewed by Hispanic youth on Spanish-language TV for other food categories was comparable to ads viewed on English-language TV with one exception: cereal represented 22% of food ads to children on English-language TV compared with just 11% of ads viewed by Hispanic children on Spanish-language TV.

## CONCLUSIONS AND RECOMMENDATIONS

In evaluating companies' targeted marketing practices, it is important to recognize that food and beverage marketing designed to appeal directly to Hispanic and Black consumers is not problematic in and of itself. However, this research demonstrates that racial-ethnic targeted food marketing likely contributes to health disparities. Researchers did not conduct a nutritional analysis of targeted brands, but the majority of advertising targeted to Hispanic and Black consumers promoted food and beverage product categories comprised primarily of nutritionally poor products. Furthermore,

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young people viewed substantial amounts of this advertising. For example, fast-food and other restaurants represented almost 40% of all TV advertising spending, as well as advertising on Spanish-language and Black-targeted TV networks. Other categories devoted a disproportionately higher amount of advertising on Spanish-language and/or Black-targeted TV. Of special concern was the exceptionally high amount of candy advertising targeted to Hispanic and Black consumers, as well as snack food brands targeting Black youth. In addition, some companies were noteworthy for the amount as well as the proportion of their advertising spending devoted to targeted media. For example, Hershey spent more than any other company in advertising on Black-targeted TV and also allocated the highest proportion of TV advertising to this medium. On Spanish-language TV, McDonald's, Mars, and

General Mills each spent more than \$66 million in advertising, while Mars also allocated almost one-quarter of its TV advertising budget to Spanish-language programming.

This research confirms public health concerns about food and beverage marketing targeted to Black and Hispanic consumers, especially children and adolescents. Due to their greater exposure to media and food marketing, proposals to reduce unhealthy food marketing to youth and/or increase marketing of nutritious foods would also greatly benefit Black and Hispanic youth. In addition, industry pledges to increase marketing of healthy products must include expansion of advertising in Black- and Hispanic-targeted media, where healthier categories are currently significantly underrepresented. Furthermore, public health advocacy campaigns should focus on improving marketing practices of companies that currently allocate disproportionately more of their advertising budgets to market unhealthy products to Black and Hispanic youth.

## Background

Exposure to unhealthy food marketing likely contributes to poor diet among all youth, including Black and Hispanic youth who also suffer from higher rates of obesity and other diet-related diseases.

High rates of overweight and obesity and poor diet among youth in Black and Hispanic communities present a public health crisis. In 2011-2012, more than one in five Hispanic and Black youth ages 2 to 19 suffered from obesity, significantly higher than rates among White non-Hispanic youth.<sup>1</sup> Rates for Hispanic and Black boys ages 6 to 11 were highest, exceeding 25%. Sugary drink and fast food consumption has been linked with higher energy, sugar, saturated fat and sodium consumption,<sup>2,3</sup> and various studies have found Hispanic and Black adolescents consume these products more often than non-Hispanic White adolescents.<sup>4-7</sup> Further, in 2013 the prevalence of not having consumed fruits or vegetables in the past week was higher among Black and Hispanic youth when compared with White youth.<sup>8</sup> In addition, as acculturation level increases among Hispanic youth, diet quality decreases.<sup>9</sup> As a result, Hispanic and Black youth also face higher risks of the severe lifelong health consequences of poor diet and obesity, including cardiovascular disease, asthma, diabetes, and cancer.<sup>10-13</sup>

As for all youth, exposure to unhealthy food marketing is a likely contributor to poor diet among Black and Hispanic children and adolescents.<sup>14-16</sup> In 2009, food

and beverage companies spent \$1.8 billion in marketing directed specifically to youth under 18, with television advertising representing one-third of these expenditures.<sup>17</sup> In 2014, on average, children ages 2 to 11 viewed 12.8 food and beverage ads per day on TV alone – almost 4,700 ads per year – and adolescents ages 12 to 17 viewed 15.2 ads per day.<sup>18</sup> Fast-food restaurants represented more than one-quarter of food-related ads seen by children and almost one-third of those seen by adolescents. Other restaurants, candy, snack foods, and carbonated beverages contributed another third of food ads seen by all youth. Analyses of the nutrition content of TV food advertising demonstrated that 84% of ads viewed by children promoted products with high amounts of sugar, saturated fat and/or sodium.<sup>19</sup> Despite industry pledges to improve food and beverage advertising to children,<sup>20</sup> studies document little progress in reducing unhealthy food advertising to children under age 12.<sup>21,22</sup> In addition, food-related advertising to older youth (ages 12 to 17) increased by 25% from 2007 to 2014.<sup>23</sup>

Research consistently demonstrates the harmful effects of unhealthy food marketing on young people's diets and health. In a comprehensive review of the literature, the Institute of Medicine concluded that food marketing to children increases preferences and requests to parents for the unhealthy foods advertised and likely contributes to poor diets, obesity, and related diseases. More recent studies demonstrate that exposure to food advertising increases children's and teens' consumption of highly advertised food categories (including fast food and sugar-sweetened carbonated beverages),<sup>25</sup> increases snacking of any available food and total calories consumed,<sup>26-28</sup> and increases taste preferences for advertised products.<sup>29,30</sup> Further evidence demonstrates that it is extraordinarily difficult to counteract the influence of food marketing – even for adults – especially when it promotes highly palatable products high in sugar or saturated fat.<sup>31,32</sup>

### A DOUBLE DOSE OF FOOD MARKETING

Public health experts have raised concerns that Hispanic and Black youth receive a “double dose” of unhealthy food marketing compared with White non-Hispanic youth, and this exposure likely contributes to or exacerbates health disparities affecting communities of color.<sup>33</sup> These youth may be disproportionately exposed to food-related marketing for at least three reasons: 1) They are more likely to live in communities where unhealthy



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food marketing is more prevalent; 2) They may be exposed to more of the media where food-related products are advertised; and 3) Food and beverage companies target marketing for unhealthy products specifically to Hispanic and Black consumers, including young people.

Research on community-level food marketing has found that marketing of unhealthy products is more prevalent in low-income and Black and Hispanic communities, including on billboards and other outdoor signage, in schools, and in retail establishments and fast-food restaurants.<sup>34-38</sup> Due to higher levels of media usage, Hispanic and Black youth also are exposed to more of the advertising (including for unhealthy foods and beverages) that appear in these media. In a survey documenting young people's media usage (ages 8-18), Black and Hispanic youth consumed on average four and one-half more hours of media per day compared with non-Hispanic White youth, including more than one additional hour of television viewing across all media platforms (including the internet and mobile devices).<sup>39</sup> According to syndicated market research data from Nielsen,<sup>40</sup> Black children watch 42% more television and Black teens watched 68% more television than their White peers. Although Nielsen data showed similar amounts of television viewing (excluding viewing in digital media) for Hispanic and non-Hispanic youth overall, Hispanic preschoolers (ages 2-5) viewed 12% more television programming compared with non-Hispanic preschoolers.<sup>41</sup> Of note, on average, in 2012 Hispanic preschoolers watched one hour per day of Spanish-language programming primarily intended for an older audience.

Studies examining food-related advertising in media aimed primarily at Hispanic and Black audiences also document that unhealthy products are disproportionately advertised in these targeted media. For example, advertising in programming with high rates of Black viewership contained more food advertising overall and more unhealthy food advertising compared with programming aimed at a broader audience.<sup>43-45</sup>

Although studies have found significantly fewer food-related advertisements on Spanish- versus English-language children's television programming,<sup>46,47</sup> more than 84% of Spanish-language food ads promoted products of the lowest nutritional quality compared with 73% of English-language ads.<sup>48</sup> In addition, 44% to 47% of food advertising on Spanish-language children's television promoted fast-food restaurants compared with 36% of food ads on English-language television.<sup>49</sup> Further, Spanish-language television viewed by preschoolers and children contained a significantly greater proportion of ads for fast food than the English language television they viewed.<sup>50</sup> Research on food-related television advertising viewed by Black youth also demonstrates substantially greater exposure to ads for some unhealthy product categories. For example, Black children and teens saw more than twice as many ads for energy drinks and regular soda compared with White children and teens,<sup>51</sup> and 60% more fast-food ads.<sup>52</sup>

As a whole, existing research strongly suggests that food and beverage companies market some products disproportionately more to Black and Hispanic youth, and this strategy may be more common for products in typically unhealthy categories, including sugary drinks and fast food.

### TARGETED MARKETING TO HISPANIC AND BLACK YOUTH

Targeted marketing is the practice of designing marketing programs that appeal specifically to a group of consumers whom a company has identified as particularly attractive for its business,<sup>53</sup> also known as "culturally specific" content or marketing. Methods developed by consumer behavior researchers to identify targeted marketing include measuring differences in the concentration of ad placements across different types of media (e.g., Spanish-language or Black-targeted media) and differences in exposure by viewers in different demographic groups, as well as identification of customized advertising content (e.g., cultural themes, actors).<sup>54</sup>

Targeted marketing that appeals to Hispanic and Black consumers is a common practice that makes good business sense for many companies. Hispanic consumers spend more than an estimated \$1 trillion per year,<sup>55</sup> and they represent one of the largest and fastest growing demographic groups in the United States.<sup>56</sup> Hispanic households also tend to be larger and younger than other households, making them an especially attractive market for consumer goods, including food. To reach these consumers, companies spent \$8 billion on advertising in Hispanic media in 2013, representing an 8% increase over the previous year.<sup>57</sup> Although companies spent less to target their marketing to Black consumers – approximately \$2.6 billion in advertising on media focused on Black consumers in 2013

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– spending in Black-targeted media also increased 7% over the previous year.<sup>58</sup> Companies increasingly focus their marketing on Black consumers due to the increasing buying power of this demographic group, which is forecasted to grow to \$1.3 trillion in 2018.<sup>59</sup> Furthermore, consumer research advises companies to capitalize on Black consumers' appreciation of advertising that includes culturally relevant themes, depicts people of color, and is placed in media and programming that is relevant to Black audiences.<sup>60</sup>

It is important to recognize that marketing strategies designed to appeal directly to Hispanic and Black consumers in a culturally relevant manner is not in itself problematic. If a large multi-brand company does not market to a diverse set of consumers, it suggests that the company does not value some consumers and raises issues of social justice and equity.<sup>61</sup> Targeted marketing can benefit communities of color and often is viewed positively by members of these communities. Targeted marketing may support Hispanic and Black culture through local events, music and sports sponsorships, and targeted media content. Targeted marketing also may provide opportunities for minority-owned businesses and employment, as well as scholarships for minority youth. This marketing benefits local communities in other ways, such as sponsoring youth activities and providing products, incentives, and retail options tailored to communities' specific tastes. There are few alternative sources of funding to replace these contributions to Hispanic and Black communities.

However, targeted marketing that promotes nutritionally poor products that can be harmful to young people's health is problematic, especially when companies market these products disproportionately more to Hispanic and Black youth compared with White non-Hispanic youth and/or adults. As noted, previous research has documented the high incidence of marketing for unhealthy foods and beverages, including fast food and sugary drinks, to Hispanic and Black youth. Industry research also has identified food and beverage companies and brands with the most advertising in

targeted media. Among all companies, McDonald's ranked fifth in spending in all Hispanic media in 2013, including television.<sup>62</sup> Eight additional food companies (Mars, General Mills, Kellogg, Kraft Foods, Hershey, Yum! Brands, Nestlé, and PepsiCo) ranked among the 50 companies purchasing the most Hispanic media. In Black media, food categories ranked among the industries with the greatest increase in spending from 2012 to 2013.<sup>63</sup> Furthermore, candy companies increased their Black-targeted advertising spending by 39% (totaling approximately \$140 million) and restaurants' spending increased 17% (to approximately \$343 million) in 2013. However, research has not examined the extent of Hispanic- and Black-targeted advertising for food-related products in total or how companies' spending in these media compare to their total advertising spending.

## THIS REPORT

To identify food-related marketing targeted to Black and Hispanic consumers, researchers first conducted a systematic search of marketing trade press and reports and companies' annual reports and press releases from 2012 to 2014. They searched for companies' statements about their marketing programs designed to reach and/or appeal to specific segments of the population, including children, teens, millennials, parents, or families and multicultural, Spanish/Hispanic/Latino, or Black/African-American populations. Three years were examined as most companies made such statements relatively infrequently. Researchers also utilized Nielsen syndicated data for 2013 to document the categories, companies, and brands with the most advertising on Black- and Hispanic-targeted television – including volume of spending and exposure as well as disproportionate spending – focusing on advertising viewed by young people under 18.

These analyses examined all restaurant, food, and beverage companies with \$100 million or more in advertising spending in 2013 and all companies participating in the Children's Food and Beverage Advertising Initiative (CFBAI) industry self-regulatory program as of December 2014. Nielsen data provided media spending by company and brand, including advertising spending on Spanish-language and Black-targeted TV channels, as well as exposure to TV advertising by Black, White, and all children and adolescents. Nielsen also provided data on exposure to advertising on Spanish-language TV for Hispanic children, adolescents, and adults. Due to the large number of brands advertised by the companies examined, only brands with \$4.5 million or more in total advertising spending (across all media, including TV, print, radio, and digital) in 2013 were analyzed. Brands that made a substantial investment in advertising to Hispanic or Black consumers were identified as targeted brands. Hispanic-targeted brands included those

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spending \$100,000 or more in advertising on Spanish-language TV, which equals approximately one ad viewed per year by Hispanic youth. Black-targeted brands were defined as those spending \$500,000 or more on TV networks with a high proportion (>50%) of Black individuals in the audience (equal to approximately one ad viewed per year by Black youth on Black-targeted TV), as well as brands spending more than \$100,000 on Black-targeted TV networks that also had a high ratio of exposure for Black teens relative to White teens (1.9 or higher) during all TV programming. Youth-targeted brands, defined as brands with a high ratio of child and/or teen exposure to TV advertising relative to adults (1.5 for children and 0.9 for teens), also were identified. Methods for data collection and analysis are detailed in *Appendix A*.

The purpose of this report is to identify and quantify food-related targeted marketing to Hispanic and Black consumers. Targeted food advertising by company, brand, and product category is highlighted, including those with the most targeted advertising as well as those investing a relatively high proportion of their advertising budgets to reach Hispanic and Black youth. These findings identify considerable opportunity to encourage companies to reduce disparities in unhealthy food marketing aimed at youth of color.

## THE COMPANIES

This report documents advertising targeted to Hispanic and Black consumers by 26 of the largest restaurant, food, and beverage companies in the United States.

Company	CFBAI participant*	Total advertising spending in 2013**
<b>Restaurants</b>		
McDonald's USA, LLC	✓	\$992.5 mill
Yum! Brands (Taco Bell, KFC, Pizza Hut)		\$822.7 mill
Doctor's Associates (Subway)		\$557.6 mill
Wendy's		\$289.8 mill
3G Capital (Burger King)	✓	\$264.2 mill
Roark Capital Group (Arby's, Carl's Jr., and Hardees)		\$245.6 mill
dineEquity (Applebee's and IHOP)		\$220.3 mill
Sonic		\$211.5 mill
Darden Restaurants (Olive Garden and others)		\$208.7 mill
<b>Food and beverage companies</b>		
General Mills, Inc.	✓	\$837.9 mill
PepsiCo, Inc.	✓	\$822.8 mill
Kraft Foods	✓	\$612.2 mill
Kellogg Company	✓	\$560.5 mill
The Hershey Company	✓	\$536.1 mill
Mars, Incorporated	✓	\$472.4 mill
Nestle USA	✓	\$361.3 mill
Campbell Soup Company	✓	\$305.1 mill
Coca-Cola Company	✓	\$301.8 mill
Dr Pepper Snapple Group		\$180.7 mill
Tyson Foods		\$159.5 mill
Mondelez Global, LLC	✓	\$158.9 mill
ConAgra Foods, Inc.	✓	\$158.8 mill
Unilever United States	✓	\$144.4 mill
Post Foods, LLC	✓	\$90.1 mill
The Dannon Company	✓	\$86.1 mill
Ferrero U.S.A., Inc.	✓	\$54.1 mill

\* Companies that participate in the Children's Food and Beverage Advertising Initiative and (CFBAI) pledge to advertise only healthier dietary choices in child-directed media<sup>85</sup>

\*\*Source: Nielsen (2015)

## Results

This report examines targeted marketing practices and quantifies TV advertising targeted to Black and Hispanic youth in 2013 for the largest restaurant, food, and beverage companies.

In total, 26 food-related companies either: 1) spent \$100 million or more to advertise their products in all media in 2013 ( $n=23$ ), and/or 2) belonged to the Children's Food & Beverage Advertising Initiative (CFBAI) – pledging to only advertise healthier choices in child-directed advertising – as of December 2014 ( $n=17$ ).<sup>64</sup> There was substantial overlap between the two criteria. Out of 14 packaged food and beverage companies with \$100 million or more in advertising spending, all but two belonged to the CFBAI (Dr Pepper Snapple Group and Tyson Foods). In contrast, just two out of nine restaurants with more than \$100 million in spending participated in the CFBAI (McDonald's and 3G Capital [Burger King]). Three CFBAI companies spent less than \$100 million in advertising in 2013 (Post Foods, Dannon, and Ferrero).

McDonald's spent more in advertising than any other food-related company at almost \$1 billion (\$992.5 million). Three additional companies spent more than \$800 million each (Yum! Brands, PepsiCo, and General Mills). In total, the 26 companies in this analysis spent \$97 billion on advertising, contributing 74% of all food-related advertising spending.

### PUBLIC STATEMENTS ABOUT TARGETED MARKETING

Companies often made public statements about their targeted marketing practices. From 2012 to 2014, all but two companies (Ferrero and Dannon) publicly discussed marketing targeted to Hispanic, Black or other racial or ethnic audiences in their annual reports, press releases, or statements to the press. *Appendix B* details companies' specific statements. Three common themes appeared in company statements describing the benefits and/or rationale for targeting marketing to specific racial-ethnic populations: 1) A business opportunity to capture spending of a large and/or growing segment of the population; 2) Development of products and campaigns designed to appeal to specific consumers through culturally relevant connections; and 3) Demonstration of corporate responsibility through employment opportunities and philanthropic efforts.

All the companies that publicized their racial-ethnic targeted marketing referenced strategies designed to appeal to Hispanic consumers, and nearly all highlighted the increasing size and spending power of Hispanic populations as an opportunity for future business growth. Many of the large packaged food companies offered Spanish-language websites aimed at Hispanic audiences, especially families and moms (e.g., QueRicaVida.com [General Mills], ComidaKraft.com [Kraft Foods], ElMejorNido.com [Nestle], DiasGrandiosos.com [Kellogg]). These companies frequently discussed their Spanish-language advertising campaigns and product flavors designed to be especially relevant to Hispanic consumers' tastes and interests. Beverage and snack food manufacturers often incorporated Hispanic music, celebrities, and futbol into their advertising and utilized sponsorships and local events designed to appeal to younger Hispanic consumers. A few companies also discussed programs to benefit Hispanic communities, such as scholarships, hunger programs, and employment opportunities.

In contrast, just three companies (Coca-Cola Co., General Mills, and McDonald's) spoke publicly about their marketing designed to appeal directly to Black consumers. Coca-Cola commented on Black consumers as a business opportunity, noting that Black teens spend more than other teens. General Mills and McDonald's both noted the trendsetting influence of African-Americans on the "general market" as a reason to create Black-targeted campaigns. Both companies also highlighted corporate responsibility initiatives to benefit Black communities. On the other hand, PepsiCo noted its focus on "multicultural" millennials

## Targeted marketing by top Hispanic- and Black-targeted advertisers\*

Company	Targeting Hispanic consumers	Targeting Black consumers
	<ul style="list-style-type: none"> <li>McDonald's ranked #5 out of the 50 largest advertising spenders in Hispanic-focused media:<sup>86</sup> <ul style="list-style-type: none"> <li>Spent \$111.3 million on all Hispanic media in 2013, a 3% increase from 2012.</li> </ul> </li> <li>McDonald's philosophy is to lead with "ethnic insights" and integrate these perspectives throughout the marketing process.                             <ul style="list-style-type: none"> <li>Sponsoring the FIFA World Cup Soccer Sweepstakes reaches Hispanic audiences and has broad appeal to the general market.</li> <li>Offering employment, scholarships, mentorship programs, and volunteer opportunities allows McDonald's to create goodwill in the Hispanic community.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>McDonald's was among the largest advertising spenders in Black-focused media:<sup>87</sup> <ul style="list-style-type: none"> <li>Spent \$33 million on all Black media in 2013, a 31% decrease from 2012.</li> </ul> </li> <li>McDonald's maintains several website aimed at specific racial-ethnic audiences, including dedicated Black, Asian, and Hispanic websites.                             <ul style="list-style-type: none"> <li>365Black.com highlights the company's support for events in Black communities, including the Inspiration Celebration Gospel Tour, the All-American High School Basketball Games, and the Essence Music Festival.</li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>General Mills ranked #17 in advertising spending in Hispanic-focused media:<sup>88</sup> <ul style="list-style-type: none"> <li>Spent \$70.4 million on all Hispanic media in 2103, a 15% decrease from 2012.</li> </ul> </li> <li>The company focuses on pinpointing the best location to reach Hispanic consumers, often delivering advertising messages to connect with consumers where they shop.</li> <li>General Mills maintains a Spanish-language website (QueRicaVida.com) and blogging presence to achieve cultural relevancy. The website features coupons, recipes, and a web series.</li> </ul>	<ul style="list-style-type: none"> <li>The company aims to expand business growth by leveraging Black consumers as influencers and trendsetters within their communities.</li> <li>Honey Nut Cheerios and Hamburger Helper are brands that resonate with Black consumers, so General Mills developed targeted-messaging to reach these consumers.</li> <li>Yoplait yogurt's singer-spokesperson, Tisha Campbell-Martin, resonates with Black women and encourages them "take charge of their health."</li> </ul>
	<ul style="list-style-type: none"> <li>PepsiCo ranked #50 in advertising spending in Hispanic-focused media:<sup>89</sup> <ul style="list-style-type: none"> <li>Spent \$33.6 million on all Hispanic media in 2013, a 59% increase from 2012.</li> </ul> </li> <li>PepsiCo aims to create "crossover appeal" when engaging multicultural audiences through campaigns that transcend borders and cultural differences, while still maintaining brand popularity and relevance across many different audiences.                             <ul style="list-style-type: none"> <li>Sports and music celebrities of various cultural and ethnic backgrounds serve as spokespeople.</li> <li>Products such as Pepsi Limon are designed to appeal Hispanic consumers.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>PepsiCo was among the largest advertising spenders in Black-focused media:<sup>90</sup> <ul style="list-style-type: none"> <li>Spent \$31 million on all Black media in 2013, a 10% increase from 2012.</li> </ul> </li> <li>The company's utilizes Black music and sports celebrities with crossover appeal, such as Beyoncé, Serena Williams, and Usher, to reach Black consumers as well as a general youth audience.</li> </ul>
	<ul style="list-style-type: none"> <li>Yum! Brands ranked #35 in advertising spending in Hispanic-focused media:<sup>91</sup> <ul style="list-style-type: none"> <li>Spent \$41.8 million on all Hispanic media in 2013, a 30% increase from 2012.</li> </ul> </li> <li>The Hispanic market is seen as a "key target group" for the company.</li> <li>Yum Brands' restaurant chains (Taco Bell, KFC, and Pizza Hut) utilize Spanish-language TV and web ads, and some offer Spanish-language online ordering, to reach Hispanic consumers.</li> </ul>	<p>Researchers did not identify any recent public statements from the company regarding marketing targeted to Black consumers.</p>
	<ul style="list-style-type: none"> <li>Kraft Foods ranked #30 in advertising spending in Hispanic-focused media:<sup>92</sup> <ul style="list-style-type: none"> <li>Spent \$48.0 million on all Hispanic media in 2013, a 25% decrease from 2012.</li> </ul> </li> <li>Kraft was one of the first companies to develop an integrated marketing campaign for Latino women, featuring culturally relevant messages on ComidaKraft.com.</li> <li>The Spanish-language website features traditional recipes and budget-friendly solutions, along with messaging that recognizes that Hispanic consumers want to preserve their culture when cooking for their families.</li> </ul>	<p>Researchers did not identify any recent public statements from the company regarding marketing targeted to Black consumers.</p>

*Continues on the next page >*

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Targeted marketing by top Hispanic- and Black-targeted advertisers\* (continued)

Company	Targeting Hispanic consumers	Targeting Black consumers
	<ul style="list-style-type: none"> <li>• Kellogg ranked #29 in advertising spending in Hispanic-focused media:<sup>93</sup> <ul style="list-style-type: none"> <li>◦ Spent \$49.2 million on all Hispanic media in 2013, a 12% decrease from 2012.</li> <li>◦ Among the highest spenders on Hispanic-targeted magazine placements, \$3.2 million in 2013.</li> </ul> </li> <li>• Kellogg focuses on integrating Hispanic messaging into all marketing practices, from partnering with Univision to increase online website traffic to sponsoring community events in high-density Hispanic neighborhoods.</li> <li>• Kellogg maintains a Spanish-language website, DiasGrandiosos.com (Wonderful Days), with recipes, coupon, and articles aimed at Latina mothers.</li> </ul>	<p>Researchers did not identify any recent public statements from the company regarding marketing targeted to Black consumers.</p>
	<ul style="list-style-type: none"> <li>• Hershey ranked #34 in advertising spending in Hispanic-focused media:<sup>94</sup> <ul style="list-style-type: none"> <li>◦ Spent \$42.1 million on all Hispanic media in 2013, a 91% increase compared to spending in 2012.</li> </ul> </li> <li>• Hershey sponsors the Hispanic Heritage Foundation, which honors Latinos for their positive impact in the U.S. and abroad.</li> </ul>	<ul style="list-style-type: none"> <li>• Hershey was among the largest advertising spenders in Black-focused media:<sup>95</sup> <ul style="list-style-type: none"> <li>◦ Spent \$41 million on all Black media in 2013, a 31% increase from 2012.</li> </ul> </li> <li>• We did not identify any recent public statements from the company regarding its targeted marketing practices.</li> </ul>
	<ul style="list-style-type: none"> <li>• Mars ranked #15 in advertising spending in Hispanic-focused media:<sup>96</sup> <ul style="list-style-type: none"> <li>◦ Spent \$77.3 million annually on all Hispanic media in 2013, a 49% increase from 2012.</li> <li>◦ Spent among the most on Hispanic-targeted magazine placements — \$7 million annually.</li> </ul> </li> <li>• Mars utilizes an advertising agency that specializes in developing campaigns that connect with Hispanic consumers and promotes specific brands with Spanish-language ads and websites.</li> </ul>	<p>Researchers did not identify any recent public statements from the company regarding marketing targeted to Black consumers.</p>
	<ul style="list-style-type: none"> <li>• Nestlé ranked #45 in advertising spending in Hispanic-focused media:<sup>97</sup> <ul style="list-style-type: none"> <li>◦ Spent \$37.1 million annually on all Hispanic media in 2013, a 5% decrease from 2012.</li> </ul> </li> <li>• Nestlé campaigns attempt to capitalize on the emotional attachment Hispanic consumers have to Nestlé brands in their home countries, while also forming new attachments to U.S.-based brands.</li> <li>• Nestlé maintains a Spanish-language website (ElMejorNido.com), which features recipes, menu ideas, cooking videos, and specific brand promotions.</li> </ul>	<p>Researchers did not identify any recent public statements from the company regarding marketing targeted to Black consumers.</p>

Source: Company statements and other publicly available information

## Results

(including both Black and Hispanic youth) through celebrity spokespersons, sponsorships, and events, stating that this strategy reinforces the cultural relevance of its products to all youth. Similarly, Dr Pepper Snapple Group commented that its Hispanic celebrities, sponsorships and events were also designed to have “crossover” appeal to a broader youth audience. Beyond marketing aimed at Hispanic and Black consumers, McDonald’s Asian-targeted website (MyInspirAsian.com) was the only publicly available example found that referenced marketing targeted specifically to any other racial or ethnic audience within the United States.

### Major advertisers in Hispanic and Black media

*Advertising Age* has identified restaurant, food, and beverage companies as some of the biggest spenders in Hispanic media.<sup>65</sup> In 2013, three food-related companies ranked among the 20 companies spending the most to advertise in Hispanic media (including television, magazines, newspaper, and websites): McDonald’s (#5), Mars (#15), and General Mills (#17). Among the top-50 Hispanic advertisers, Kellogg and Kraft Foods ranked 29th and 30th, Hershey and Yum! Brands ranked 34th and 35th, Nestle ranked #45, and PepsiCo was 50th. Notably, some of these companies substantially increased their Hispanic media spending from

2012 to 2013. During this time total advertising spending in Hispanic media increased 14%, while Hershey’s Hispanic-targeted media budget almost doubled (+91%), PepsiCo spending went up 59%, Mars spending increased 49%, and Yum! Brands increased its spending by 30%. The majority of Hispanic-targeted advertising was devoted to broadcast, cable, and network TV. However, Unilever, Mars, and Kellogg ranked third, fourth, and tenth among companies in all categories in advertising in Spanish-language magazines.

Another recent industry publication highlighted some food-related companies with relatively high spending on advertising in media aimed at Black consumers in 2013, including Hershey (\$41 million), McDonald’s (\$33 million), and PepsiCo (\$31 million).<sup>66</sup> Notably, from 2012 to 2013 Hershey increased its spending in Black-targeted media by 31% and PepsiCo increased its spending 10%, while McDonald’s reduced its advertising in Black-targeted media by 31%. Among the industries purchasing advertising in Black-targeted media, restaurant spending totaled \$49.8 million and candy companies spent \$40.2 million. In comparison, insurance companies spent \$47 million, supermarkets spent \$28.5 million, and hair care products spent \$25 million. From 2012 to 2013, candy companies also increased their advertising in Black-targeted media by 39% and restaurants’ spending increased 17%.

Results

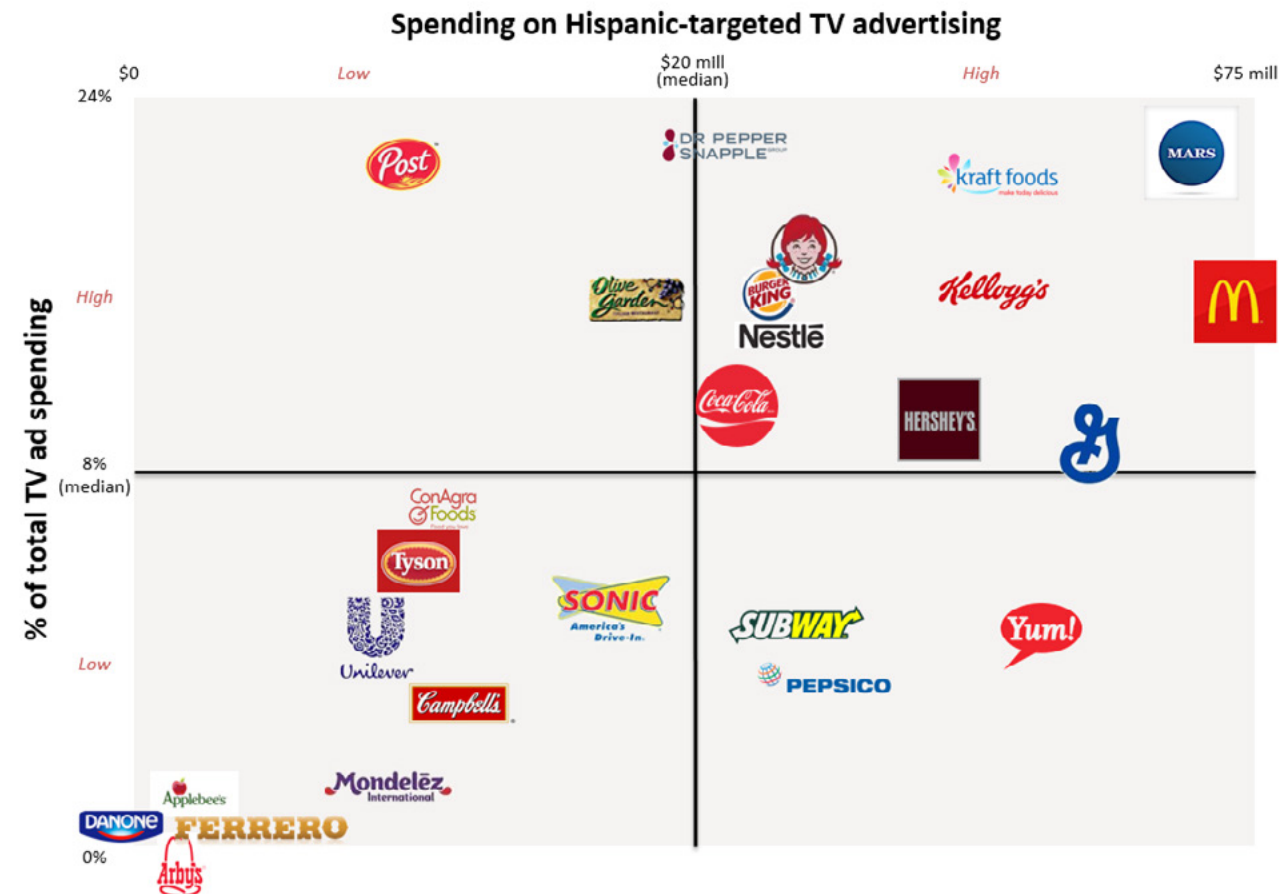
**HISPANIC AND BLACK-TARGETED TV ADVERTISING BY COMPANY**

Analyses of Nielsen data on advertising spending confirmed that most of the companies in this report targeted some advertising to Hispanic consumers on Spanish-language television (see *Appendix Table C1*). In total, these companies spent \$675 million on Spanish-language TV advertising in 2013, which represented 96% of all food-related advertising spending on Spanish-language TV. Just four companies did not advertise at all or spent less than \$10,000 on Spanish-

language TV (Roark Capital Group, dineEquity, Dannon, and Ferrero). Most of the companies analyzed also purchased some advertising on TV channels with average audiences comprising 50% or more Black viewers. Only ConAgra did not advertise on these channels. However, most companies spent far less to advertise on Black-targeted TV than on Spanish-language TV, totaling \$161 million in 2013. The companies in this analysis contributed 76% of all food-related advertising spending on Black-targeted TV.

Among the companies that advertised on Spanish-language TV, there was wide variation in the amount of spending as well as the proportion of advertising budgets allocated to the medium (see *Figure 1*). Seven companies spent \$48

FIGURE 1. COMPANY INVESTMENTS IN HISPANIC-TARGETED ADVERTISING



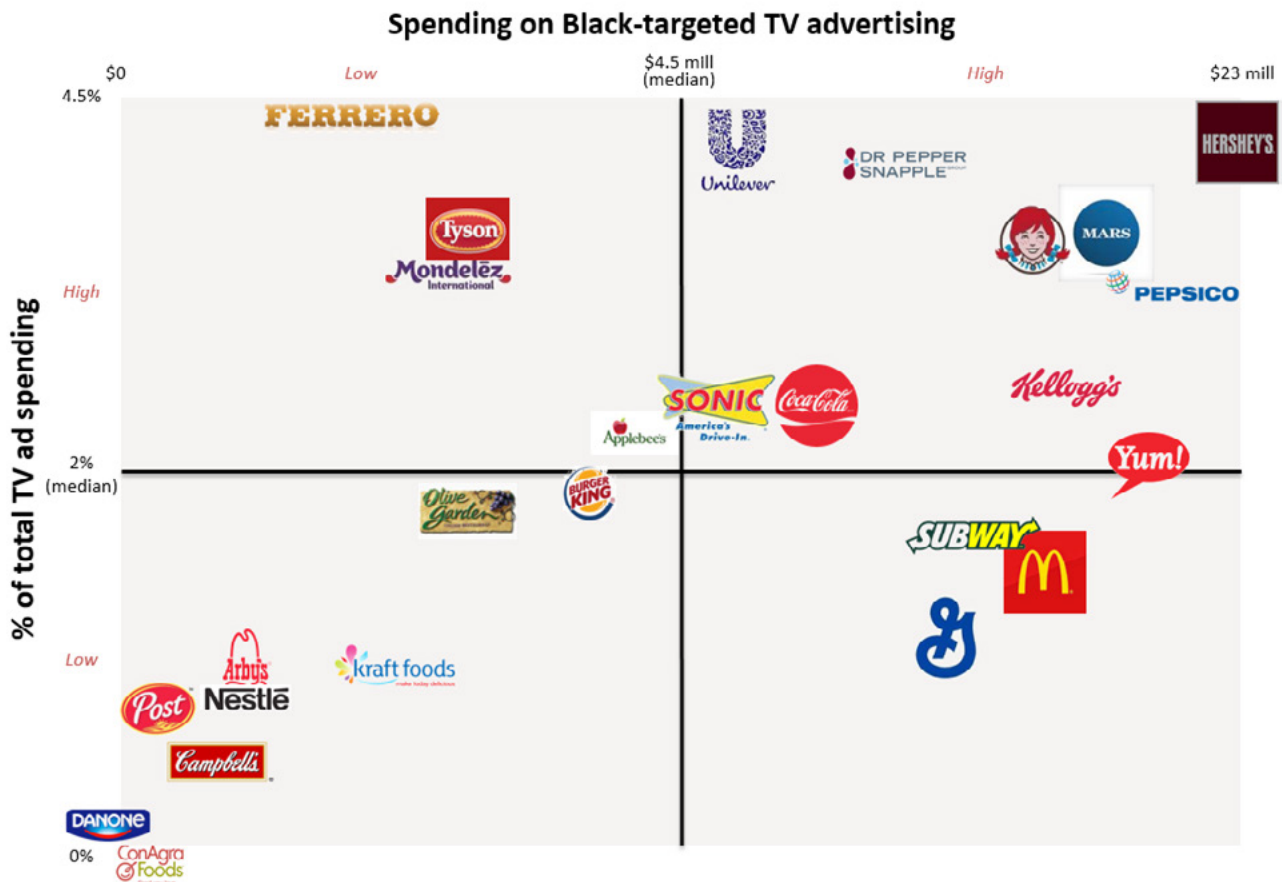


## Results

million or more, including McDonald's (\$75 million), Mars (\$72 million), and General Mills (\$66 million). In addition, seven companies invested 10% or more of their TV advertising spending to Spanish-language, compared to an average of 8.5% for all the companies in this analysis. Mars spent almost one-quarter of its TV advertising budget on Spanish-language advertising, while Dr Pepper Snapple Group, Post Foods, and Kraft Foods each allocated approximately 13% to 14% of TV advertising to Spanish-language programming.

Companies also varied widely in the amounts and proportions of advertising budgets spent on Black-targeted TV channels (see *Figure 2*). Hershey stood out for spending the most in Black-targeted advertising (\$23 million) and for allocating a high proportion of its TV advertising budget to the medium (4.4%), compared to an average of 2.0% for all the companies in this analysis. PepsiCo and Yum! Brands each spent \$16 to \$18 million in advertising on Black-targeted TV, followed by Mars and Kellogg at \$10 to \$11 million. Additional companies allocating more than 4% of their TV advertising spending to Black-targeted channels included Ferrero, Unilever, and Dr Pepper Snapple Group.

FIGURE 2. COMPANY INVESTMENTS IN BLACK-TARGETED TV



## Results

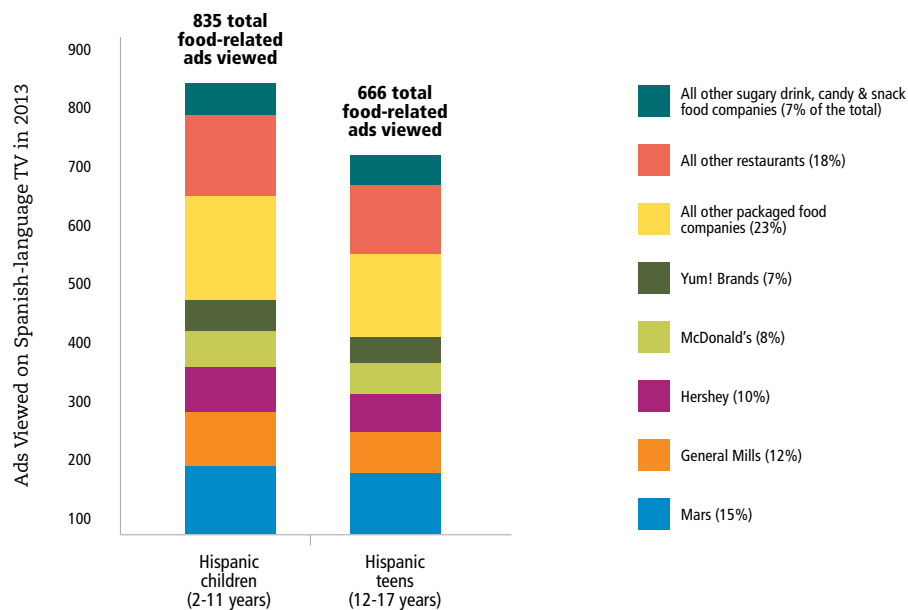
### Hispanic and Black youth exposure to TV advertising by company

Examining children's and teens' exposure to TV advertising for these companies confirms that a few companies were responsible for the majority of food-related ads viewed by Black youth on all TV and by Hispanic youth on Spanish-language TV. On Spanish-language TV, Hispanic children viewed on average 2.2 food-related ads per day from the companies in this analysis and Hispanic teens averaged 1.8 Spanish-language ads per day (representing 96% of all food-related ads viewed by youth on Spanish-language TV). Five companies (Mars, General Mills, Hershey, McDonald's, and Yum! Brands) were responsible for just over half of

food-related ads viewed by Hispanic children and teens on Spanish-language TV (see *Figure 3*). The remaining packaged food companies (led by Kellogg and Kraft Foods) as well as the remaining restaurants together contributed almost 20% of ads viewed each. Across all television programming, Black children viewed on average 13.3 food-related ads per day from the companies analyzed and Black teens averaged 17.5 ads per day in 2013. Five companies (General Mills, McDonald's, Hershey, Kellogg, and Yum! Brands) were responsible for 55% of all TV ads viewed by Black children and 49% of all ads viewed by Black teens (see *Figure 4*). Of note, Hershey ranked second in TV ads viewed by Black children and teens, but fourth in ads viewed by White children. Ads from other sugary drink, candy, and snack food companies comprised another 23% of the TV ads viewed by Black teens and 17% of those seen by Black children.

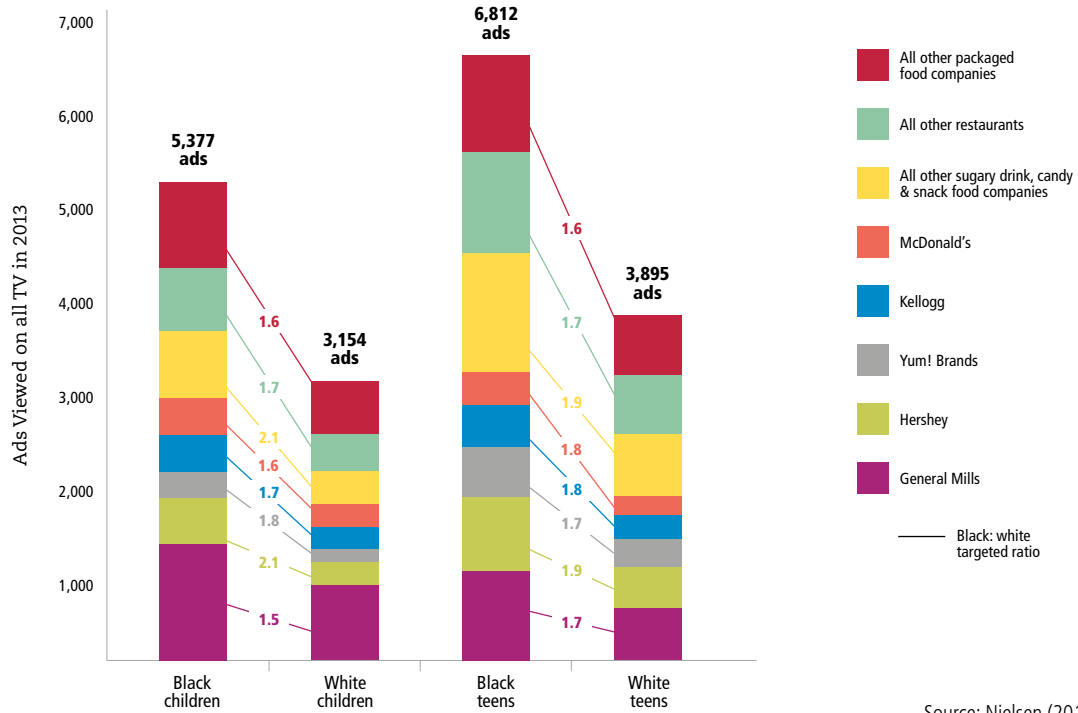
*Figure 4* also illustrates the disparity in food-related ads viewed by Black compared with White youth. In 2013, Black children watched 43% more minutes of

FIGURE 3. HISPANIC YOUTHS' EXPOSURE TO ADVERTISING ON SPANISH-LANGUAGE TV BY COMPANY IN 2013



Source: Nielsen (2015)

FIGURE 4. BLACK AND WHITE YOUTHS' EXPOSURE TO ADVERTISING ON ALL TV PROGRAMMING BY COMPANY



television compared with White children, but they were exposed to 71% more food-related ads. Black teens watched 68% more television and were exposed to 75% more food-related ads compared with White teens. As a result, Black children viewed 5.6 more food ads daily than White children viewed, and Black teens viewed 7.5 more ads compared with White teens. Further examination revealed that a few companies contributed disproportionately to this disparity. Compared with White children and teens, Black children and teens saw more than twice as many ads for Mars, Coca-Cola, and Unilever products. Black children also saw more than twice as many ads for PepsiCo, Hershey, and Dr Pepper Snapple Group products than White children saw.

### Summary of targeted marketing by company

Although companies rarely publicize their marketing strategies, 24 of the 26 companies in this analysis made public statements about their targeted marketing to Hispanic consumers. Most of these statements discussed the business opportunity of attracting this growing segment of the population and/or companies' attempts to develop culturally relevant products and marketing campaigns, often aimed at Hispanic families and moms. Dr Pepper Snapple Group widely publicized its strategy to appeal to multicultural youth through music and other themes that resonate with young Latinos. Examination of Nielsen data on companies' advertising on Spanish-language TV demonstrated a wide range of investment in Hispanic-targeted media. All but four companies spent at least \$4 million on Spanish-language advertising. McDonald's, Mars, and General Mills spent the most at \$66 to \$75 million, while Yum! Brands, Kellogg, and Kraft Foods also ranked among the top advertisers on Spanish-language TV. Mars and General Mills also ranked first and second in number of ads viewed by Hispanic children and teens on Spanish-language TV, while Hershey surpassed the other

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top spenders (including McDonald's) in number of ads viewed by Hispanic youth. Some companies also invested disproportionately more on Hispanic-targeted TV advertising, including Burger King, Kellogg, Wendy's, Kraft Foods, Post Foods, and Dr Pepper Snapple Group. However, Mars was unique in allocating nearly one-quarter of its TV advertising spending to Spanish-language TV.

In contrast to the large number of companies that publicly discussed their Hispanic-targeted marketing, just three companies (Coca-Cola, General Mills, and McDonald's) publicized marketing programs to appeal to Black consumers. PepsiCo also discussed its strategy to use celebrities and sponsorship to appeal to "multicultural" millennials and to

reinforce the cultural relevance of its products with all youth. Nearly all companies analyzed spent some portion of their TV advertising budgets on Black-targeted TV channels, but a small number of companies spent a relatively large amount and/or a high percentage of their advertising on this medium. Hershey spent the most (\$23 million), representing a relatively high 4.4% (vs. the median of 2.0%) of its TV advertising budget. PepsiCo, Yum! Brands, Kellogg, and Mars completed the list of companies spending the most on Black-targeted TV advertising. Mars, as well as Unilever, Wendy's, and Ferrero, allocated the highest proportions of their TV advertising budgets to the medium. Hershey was also notable for contributing the second highest amount of food-related TV advertising to Black youth, exceeded only by General Mills.

### TARGETED BRANDS AND CATEGORIES

## Racial-ethnic targeted marketing by CFBAI companies

As of December 2013, 17 companies belonged to the Children's Food and Beverage Advertising Initiative (CFBAI).<sup>98</sup> These companies pledged to "use CFBAI's category-specific uniform nutrition criteria to govern what foods are in advertising primarily directed to children under age 12 ('child-directed advertising'), or to not engage in child-directed advertising."<sup>99</sup> Pledges require that participants only advertise CFBAI-approved products that meet the Initiative's nutrition standards during TV programming where children under 12 make up 35% or more of the audience (i.e., children's programming).<sup>100</sup>

In 2013, CFBAI companies spent:

- \$6.8 billion to advertise in all media – 70% of the total for all companies in this analysis
- \$5.3 billion to advertise on TV – 66% of the total
- \$502 million to advertise on Spanish-language TV – 74% of the total
- \$104 million to advertising on Black-targeted TV – 64% of the total

CFBAI companies also were responsible for the majority of food-related ads that young people viewed on TV in 2013:

- 2,815 TV ads viewed by all children under 12 on average – 80% of the total for all companies in this analysis
- 3,222 TV ads viewed by all teens (12-17 years) on average – 73% of the total
- 640 and 510 ads viewed by Hispanic children and teens, respectively on Spanish-language TV – 77% of the total
- 4,304 TV ads viewed by Black children (80% of the total) and 5,044 TV ads viewed by Black teens 74% of the total

*Continues on the next page >*

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### Racial-ethnic targeted marketing by CFBAI companies (continued)

#### Targeted brands from CFBAI companies

Just 15 of the youth-targeted brands in this analysis from CFBAI companies were approved for advertising on child-directed TV.<sup>101</sup> Five CFBAI-approved brands also targeted Hispanic consumers, and two targeted both Hispanic and Black consumers. We found no evidence that CFBAI companies advertised unapproved products on “child-directed” television (according to their definition). However, CFBAI companies produced 44 of the 48 youth-targeted brands in this analysis, and 30 of these 44 youth-targeted brands also targeted Hispanic and/or Black consumers.

#### CFBAI COMPANY BRANDS TARGETING YOUTH AND HISPANIC OR BLACK CONSUMERS

Company	Total TV ad spending (mill)	TV ads viewed by all children (2–11 years)	TV ads viewed by all teens (12–17 years)	Hispanic-targeted brands	Black-targeted brands	Brands targeting both
McDonald's	\$774.4	301.6	262.1			<b>McDonald's</b>
PepsiCo	\$182.1	51.1	109.2		Gatorade, Doritos, Ruffles Ultimate, Doritos Jacked	Chee-tos, Mountain Dew Kickstart, Chee-tos Mixups
Mars	\$135.6	58.9	142.4		Snickers Bites	Twix, Wrigley's Orbit, 5 Chewing Gum, Skittles, Starburst, Wrigley's Extra
Kellogg	\$81.1	90.9	104.9	<b>Frosted Flakes</b>		Pop Tarts, Krave Cereal
General Mills	\$71.7	197.6	112.6	<b>Cinnamon Toast Crunch</b>		<b>Lucky Charms, Big G Cereals</b>
Coca-Cola Co.	\$41.3	8.6	21.5		Diet Coke, Sprite, Dasani Drops	Glaceau Vitaminwater
Kraft Foods	\$43.7	65.8	70.1	<b>Lunchables, Mio</b>		Mio Fit
Mondelez Global	\$16.3	8.2	20.6		Stride	Trident

**Bold** = CFBAI-approved brand

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These company-level analyses demonstrate a wide range of corporate investment in marketing targeted to Hispanic and Black consumers. However, nearly all targeted marketing occurs at the brand level, and targeting strategies differ widely even between brands within the same company. Most companies in this analysis aimed different brands at different age groups (children, teens/youth, parents or adults) and most appeared to target just a subset of their brands to Hispanic and/or Black consumers.

The 26 companies in this analysis supported 267 different brands with at least \$4.5 million in total advertising including at least \$500,000 in TV advertising in 2013. One-third of these brands ( $n=92$ ) spent \$100,000 or more to advertise on Spanish-language TV, devoting on average 12.7% of their TV advertising budgets to Spanish-language TV. Three brands (7Up, Kraft Mayonnaise, and Fuze Iced Tea) only advertised on Spanish-language TV. In addition, one-third of all brands

( $n=90$ ) qualified as Black-targeted because they spent more than \$500,000 on Black-targeted channels and/or had a high ratio of Black versus White teen exposure. On average, Black-targeted brands devoted 2.7% of their TV advertising budgets to Black-targeted TV channels, with the highest relative investment by Sun Drop regular soda and 7Up Ten diet soda at 22%. There was substantial overlap, with 16% of brands ( $n=44$ ) targeting both Hispanic and Black consumers. A relatively small number of brands in this analysis ( $n=48$ , 18%) were targeted to children and/or teens as evidenced by disproportionately higher numbers of ads viewed by youth compared with adults. These youth-targeted brands were significantly more likely to also target Hispanic and/or Black consumers: 71% of youth-targeted brands compared with 47% of other brands. Just five youth-targeted packaged-food brands (Cinnamon Toast Crunch, Lucky Charms, Krave cereal, Frosted Flakes, and Oscar Mayer Lunchables), as well as McDonald's and Burger King, offered products that were approved by CFBAI companies to advertise on child-directed media.

### Targeted brands by company and category

Fast-food and other restaurants were most likely to target a high proportion of

## Targeted restaurant brands by company

All restaurants targeted at least one of their brands to Hispanic or Black consumers, with the majority targeting both. McDonald's also targeted its advertising to children.

Company	Total # of brands	Hispanic-targeted brands # (% of total)	Black-targeted brands # (% of total)	Brands targeting both # (% of total)	Targeted brands
Yum! Brands	3	3 (100%)	3 (100%)	3 (100%)	Taco Bell, KFC, Pizza Hut
McDonald's	1	1 (100%)	1 (100%)	1 (100%)	McDonald's, also targeted to children
Doctor's Associates	1	1 (100%)	1 (100%)	1 (100%)	Subway
Wendy's	1	1 (100%)	1 (100%)	1 (100%)	Wendy's
3G Capital	2	1 (50%)	1 (50%)	1 (50%)	Burger King
Roark Capital Group	3	0 (0%)	1 (33%)	0 (33%)	Arby's
dineEquity	2	0 (0%)	1 (50%)	0 (0%)	Applebee's
Sonic	1	1 (100%)	1 (100%)	1 (100%)	Sonic
Darden Restaurants	1	1 (50%)	1 (50%)	1 (50%)	Olive Garden

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their brands to Hispanic and Black consumers. All but three fast-food brands in this analysis (Tim Horton's from 3G Capital, Carl's Jr and Hardee's from Roark Capital Group) advertised on Black-targeted TV. The two other restaurant companies in this analysis advertised one of their two major brands on Black-targeted TV (Applebee's and Olive Garden). All fast-food and other restaurant companies except dineEquity and Sonic also advertised on Spanish-language TV.

In contrast, there was wide variation in the proportion of packaged food and beverage brands with TV advertising targeted to Hispanic or Black consumers. Mars stood out for its targeted advertising; seven of the company's 12 major

brands (58%) targeted their advertising to teens *and* to Black consumers, and six of these brands also targeted Hispanic consumers. Beverage and snack companies also targeted a relatively large proportion of their brands to Hispanic and Black consumers, as well as teens. Approximately one-half to two-thirds of PepsiCo, Dr Pepper Snapple Group, and Mondelez brands aimed their advertising at Black consumers, one-third or more targeted Hispanic consumers, and one-quarter or more targeted teens. Approximately one-third of Coca-Cola brands targeted Hispanic consumers, Black consumers, and teens. The three largest packaged-food companies (General Mills, Kellogg, and Kraft Foods) all targeted advertising for one-third or more of their brands to Hispanic consumers, but fewer than 20% of their brands to Black consumers. At least three brands from each of these companies targeted Hispanic and/or Black consumers as well as children or teens.

## Targeted packaged food and beverage brands\* by company

There was wide variation in the extent that packaged food and beverage companies targeted their brand advertising to youth, Hispanic and Black consumers. Notably, Mars targeted the majority of its brands to all three audiences.

Company	Total # of brands	Youth-targeted brands # (% of total)	Hispanic-targeted brands # (% of total)	Black-targeted brands # (% of total)	Brands targeting both # (% of total)	Youth-targeted brands also targeting Black (B) and/or Hispanic (H) consumers
Mars	12	8 (67%)	8 (67%)	10 (83%)	8 (67%)	Snickers Bites (B) Orbit (H,B) 5 Chewing Gum (H,B) Wrigley's Extra (H,B) Twix (H,B) Skittles (H,B) Starburst (H,B)
PepsiCo	27	8 (30%)	10 (37%)	13 (48%)	5 (19%)	Doritos and Doritos Jacked (B) Gatorade (B) Sprite regular soda (B) Chee-tos and Chee-tos Mixups (H,B) Mountain Dew Kickstart (H,B)
Coca-Cola Co.	13	4 (31%)	5 (38%)	5 (38%)	2 (15%)	Diet Coke (B) Dasani Drops (B) Sprite (B) VitaminWater (H,B)
General Mills	33	9 (27%)	13 (39%)	6 (18%)	5 (15%)	Cinnamon Toast Crunch (H) Lucky Charms (H,B) Big G cereals (H,B)

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Targeted packaged food and beverage brands\* by company (continued)

Company	Total # of brands	Youth-targeted brands # (% of total)	Hispanic-targeted brands # (% of total)	Black-targeted brands # (% of total)	Brands targeting both # (% of total)	Youth-targeted brands also targeting Black and/or Hispanic consumers
Kellogg	26	5 (19%)	11 (42%)	5 (19%)	4 (15%)	Krave cereal (B) Frosted Flakes (H) Pop Tarts (H,B)
Kraft Foods	28	5 (18%)	9 (32%)	2 (7%)	1 (4%)	Mio (H) Oscar Mayer Lunchables (H) Mio Fit (H,B)
Dr Pepper Snapple Group	9	3 (33%)	2 (22%)	5 (56%)	1 (11%)	7Up Ten (B) Snapple (B) Sun-Drop (B)
Mondelez Intl	8	2 (25%)	2 (25%)	5 (63%)	2 (25%)	Stride (B) Trident (H,B)
Tyson Foods	9	1 (11%)	1 (11%)	1 (11%)	1 (11%)	Tyson Frozen Entrees (H,B)

Companies with no advertising targeted to Black or Hispanic consumers and children/teens

Nestle	17	2 (12%)	4 (24%)	0 (0%)	0 (0%)	
Campbell	15	1 (7%)	4 (27%)	0 (0%)	0 (0%)	
Unilever	10	1 (10%)	2 (20%)	5 (50%)	0 (0%)	
Hershey	23	0 (0%)	6 (26%)	21 (91%)	6 (26%)	
Conagra Foods	13	0 (0%)	5 (38%)	0 (0%)	0 (0%)	
Post Holdings	2	0 (0%)	1 (50%)	0 (0%)	0 (0%)	
Ferrero SpA	3	0 (0%)	0 (0%)	1 (33%)	0 (0%)	
Dannon	3	0 (0%)	0 (0%)	0 (0%)	0 (0%)	

\*Brands that spent \$4.5 million or more on advertising in 2013



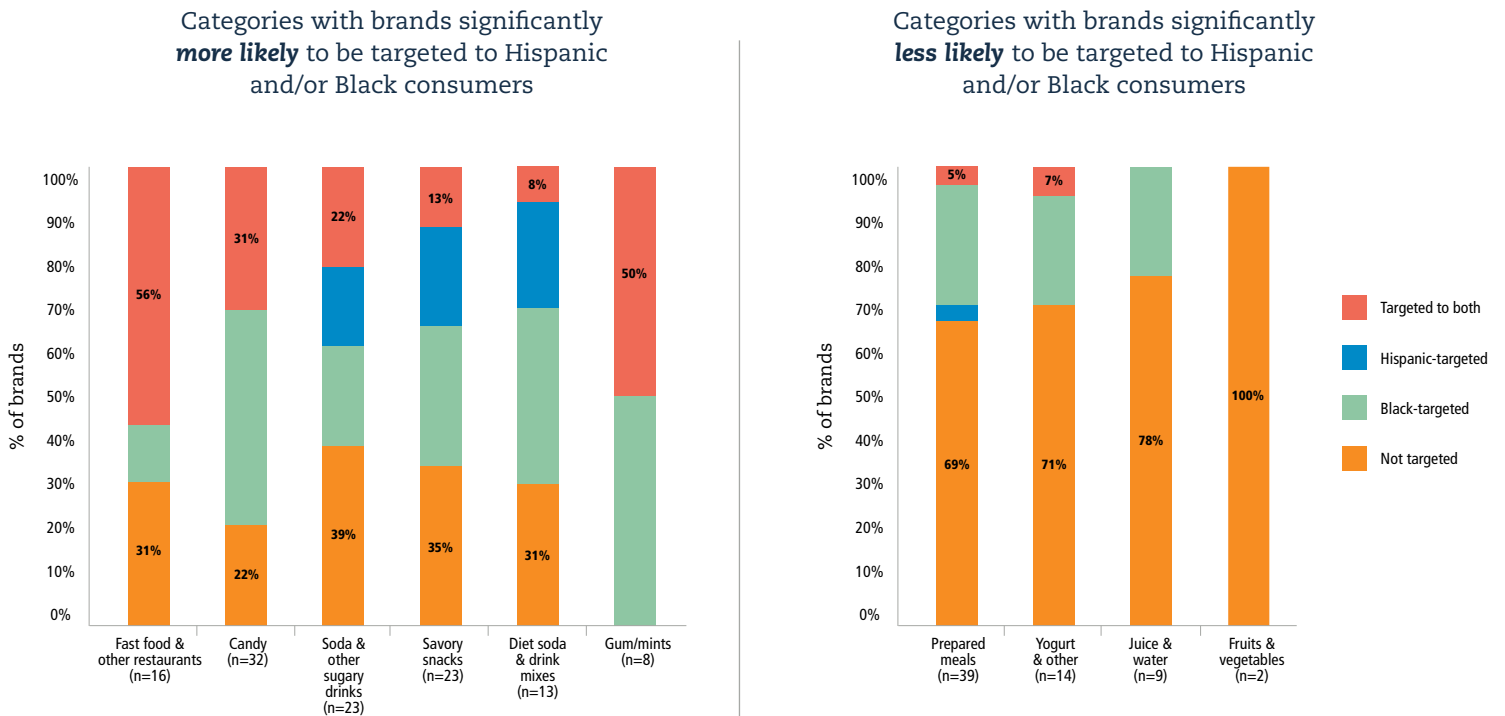
## Results

Dannon did not target any of its brands in this analysis to Hispanic, Black, or youth audiences.

The proportion of brands targeted to Hispanic and/or Black consumers also varied widely by category. Brands in six categories were significantly more likely to be targeted (fast-food and other restaurants, candy, soda and sugary drinks, savory snacks, diet soda and drink mixes, and gum and mints), while just four categories (including generally healthier dairy, juice and water, and fruit and vegetable brands) were significantly *less likely* to target Hispanic and/or Black

consumers (see *Figure 5*). Approximately one-half of restaurant and gum/mint brands were targeted to both Hispanic and Black consumers, while the other half of gum/mint brands and one-half of candy brands targeted Black consumers only. In contrast, two-thirds of prepared meal, yogurt and other dairy, juice and water, and fruit and vegetable brands did not target Hispanic or Black consumers, and just two brands in these categories targeted Black consumers.

FIGURE 5. PROPORTION OF BRANDS TARGETED TO HISPANIC AND BLACK CONSUMERS BY CATEGORY

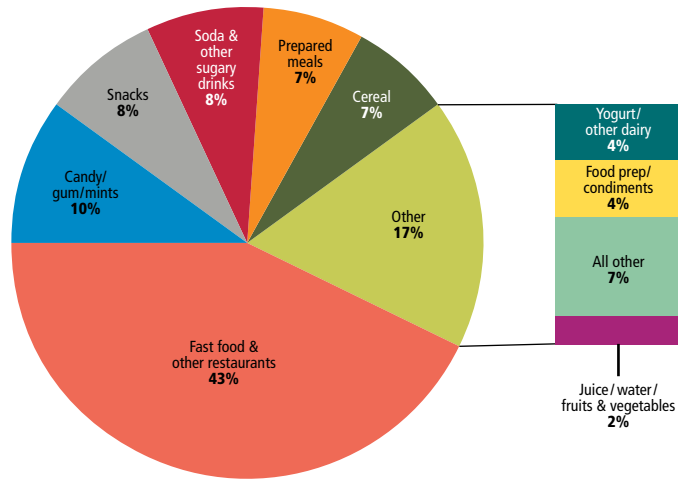


Source: Nielsen (2015)

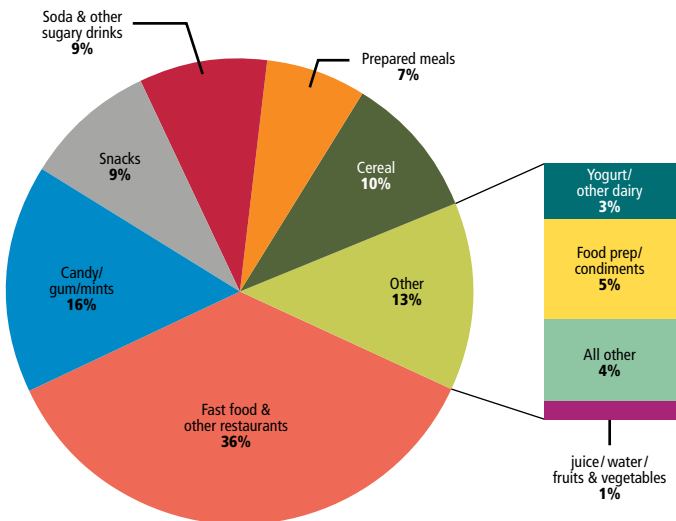
Results

FIGURE 6. PROPORTION OF TV ADVERTISING SPENDING BY CATEGORY

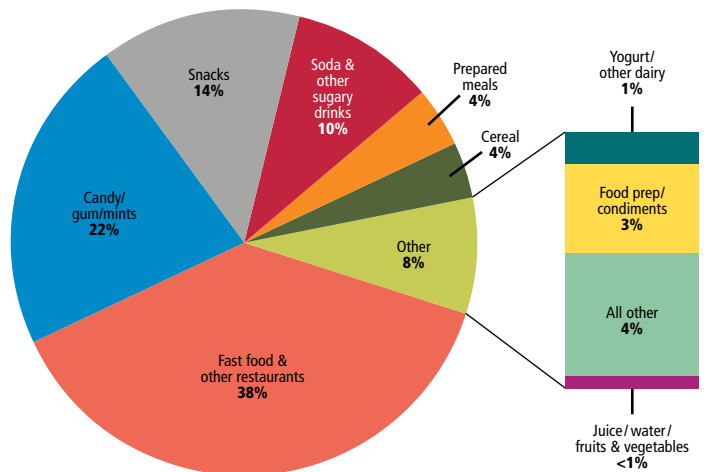
Total TV Advertising Spending: \$9.7 billion



Advertising Spending on Spanish-language TV: \$675 million



Advertising Spending on Black-targeted TV: \$161 million



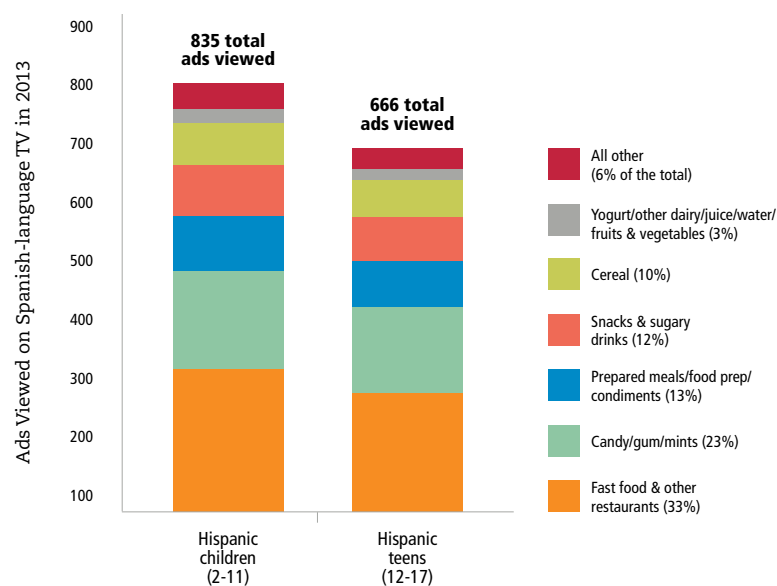
Source: Nielsen (2015)

The proportions of TV advertising spending devoted to Spanish-language and Black-targeted TV also varied widely by category (see *Figure 6*). Fast-food and other restaurant brands spent the most to advertise in targeted media, totaling \$244 million in Spanish-language TV and \$62 million in Black-targeted TV. However, restaurants represented a lower percentage of advertising spending on targeted TV channels, compared with all TV. In contrast, candy and gum brands were responsible for a significantly higher proportion of advertising spending on Spanish-language and Black-targeted TV compared with all TV: 10% of total TV advertising spending versus 16% of advertising on Spanish-language TV and 22% of spending on Black-targeted TV. Snack food brands also spent disproportionately more on Black-targeted TV advertising: the category represented 8% of all TV spending versus 13% of Black-targeted TV spending. In total, candy, gum, snacks, soda, and other sugary drinks represented 46% of all TV advertising spending for packaged foods, 54% of packaged-food spending on Spanish-language TV, and 74% of spending on Black-targeted TV. In contrast, brands in generally more nutritious categories (yogurt, other dairy, juice, water, and fruits and vegetables) comprised 10% of advertising spending on all TV, 5% of spending on Spanish-language TV, and 2% of spending on Black-targeted TV.

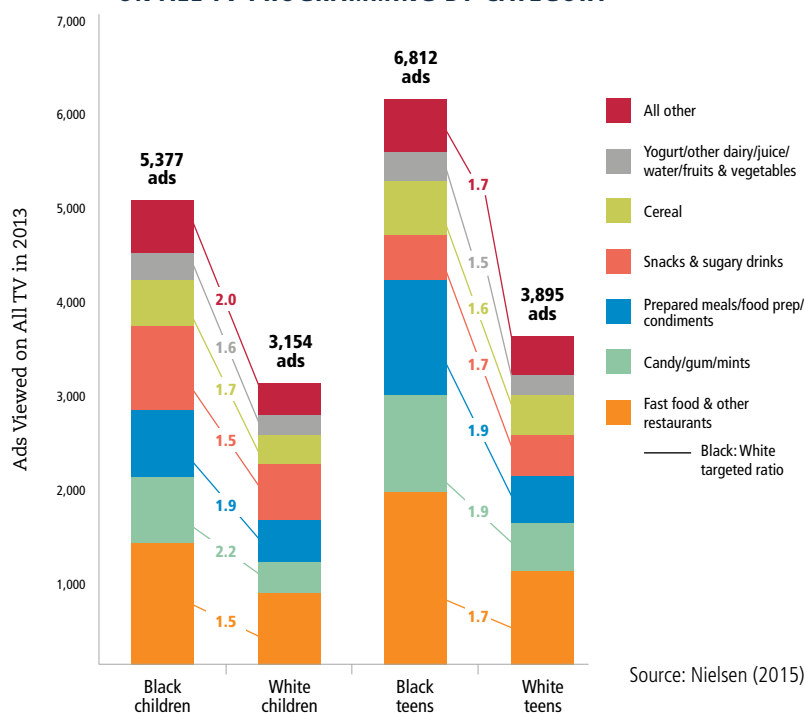
### Hispanic and Black youth exposure to TV advertising by category

Similar to spending on food-related advertising on Spanish-language TV, Hispanic youth also viewed disproportionately more Spanish-language advertisements for nutritionally poor foods and beverages (see *Figure 7*). In total, 68% of food-related ads viewed by Hispanic children on Spanish-language TV and 69% of ads viewed by Hispanic teens promoted fast-food and other restaurants, candy, gum, snack foods, and sugary drinks. By comparison, 3% of ads viewed promoted yogurt, other dairy, juice, water, or fruits and vegetables.

**FIGURE 7. HISPANIC YOUTH EXPOSURE TO ADS ON SPANISH-LANGUAGE TV BY CATEGORY**



**FIGURE 8. BLACK AND WHITE YOUTH EXPOSURE TO ADVERTISING ON ALL TV PROGRAMMING BY CATEGORY**



Source: Nielsen (2015)

## Results

Black children and teens viewed 70% more food-related TV ads in total than White children and teens viewed (see *Figure 8*). Although the proportion of ads viewed by Black and White youth was comparable for most product categories, some categories advertised disproportionately more to Black versus White children and teens. Black children saw 2.2 times as many ads for candy and gum compared with White children, and Black teens saw almost twice as many of these ads compared with White teens. In addition, Black children and teens viewed 90% more ads for snacks and sugary drinks compared with White children and teens.

### Top targeted brands

Six fast-food restaurant brands (McDonald's, Wendy's, Subway, Burger King, Taco Bell, and KFC) and one other restaurant (Olive Garden) ranked among the most-targeted food brands on Spanish-language TV, primarily because of the high amount they spent on Spanish-language advertising (ranging from \$15 to \$75 million). All of these restaurants, except KFC, also ranked among the top-10 brands in TV ads viewed by Hispanic children. Further, these same restaurants, as well as Pizza Hut, Sonic, and Applebee's, also appeared on the list of the 10 brands spending the most in advertising on Black-targeted TV (ranging from \$3.4 to \$9.6 million). Although McDonald's spent more than twice as much to advertise in Spanish-language TV than Wendy's, Wendy's outspent McDonald's in advertising on Black-targeted TV.

Three packaged-food brands also ranked among the 10 brands with the most spending on Spanish-language TV advertising: Cheerios, M&Ms, and Coca-Cola Classic. Cheerios and M&Ms, as well as Snickers and Hershey candy bar, ranked among the top-10 brands for the most advertisements viewed by Hispanic children on Spanish-language TV. The brands devoting the highest proportion of their TV advertising spending to Spanish-language TV included three candy brands (Snickers, Twix, and Jolly Rancher), two chewing gum brands (Orbit and 5 Chewing Gum), four Kraft Foods brands (Macaroni & Cheese, Kraft Singles, Mayonnaise, and Oscar Mayer Deli Fresh cold cuts), and 7Up regular soda, Hershey's Chocolate Syrup, and Tyson Frozen Entrees.

Kellogg's Pop Tarts was the only packaged-food brand that ranked among the most advertised brands on Black-targeted TV. However, packaged foods and beverages were more likely to rank among the brands devoting the highest proportion of their TV advertising to Black-targeted TV (7% or more) and/or advertising disproportionately more to Black compared with White teens (2.25 times or higher). These brands included four candy and sweet snack brands (Pop Tarts, Fruttare, Starburst, and Skittles); three sugary drinks (Coca-Cola Classic, Snapple, and Sun Drop) as well as 7Up Ten diet soda; and three savory snack brands (Lay's Potato Chips, Doritos, and Ruffles Ultimate Potato Chips, all from PepsiCo); plus Tyson Frozen Entrees and Knorr Pasta Sides.

### Summary of targeted marketing by category and brand

Of the 267 most-advertised brands from the 26 companies in our analysis, there were 92 (34%) Hispanic-targeted brands and 90 (34%) Black-targeted brands, with substantial overlap: 44 brands (16%) targeted both Black and Hispanic consumers. Fast-food and other restaurant brands spent the most to advertise in all media, including targeted media, contributing more than one-third of advertising spending on Spanish-language and Black-targeted television. However, brands in other categories advertised disproportionately more in targeted media. Candy and gum/mint brands represented almost one-quarter of food-related ads viewed by Hispanic youth on Spanish-language TV and 22% of advertising spending on Black-targeted TV. Snacks, soda, and other sugary drinks comprised an additional 18% of spending on Spanish-language TV and 24% of spending on Black-targeted TV. In contrast, generally more nutritious categories (yogurt, other dairy, juice, water, and fruits and vegetables) represented just 3% of ads viewed by Hispanic youth on Spanish-language TV and 2% of spending on Black-targeted TV. A few categories also advertised disproportionately more to Black versus White youth. Black children and teens saw approximately twice as many ads for candy, gum, snacks, and sugary drinks compared with White children and teens.

Fast-food and other restaurant brands comprised the majority of top-10 brands with the most advertising on Spanish-language and Black-targeted TV. Cheerios, M&Ms, and Coca-Cola Classic also ranked in the top-10 for spending on Spanish-language TV and Pop Tarts for Black-targeted TV. Additional brands devoting one-third or more of their TV advertising spending to Spanish-language TV included three candy (Snickers, Twix, Jolly Rancher), two chewing gum (Orbit, 5 Chewing Gum), and one regular soda brand (7Up), plus four brands from Kraft Foods (Macaroni & Cheese, Kraft Singles, Mayonnaise, and Oscar Mayer Deli Fresh). Brands with the highest proportion of ads viewed by Black versus White teens (with 2.3 or more times as many ads viewed by Black teens) included four candy and sweet snack brands (Pop Tarts, Fruttare, Starburst, Skittles), two regular sodas (Coca-Cola Classic, Sun Drop), and two savory snack brands (Doritos, Ruffles Ultimate).

## Results

### Top Hispanic-targeted brands\*

Company	Brand	Child/teen-targeted	Black-targeted	Spanish-language TV		Top-10 brand by		
				Ad spending (mill)	% of TV ad budget	Ad spending	Proportion of TV budget	Ads viewed by Hispanic children
<b>Restaurants</b>								
McDonald's		✓	✓	\$75.2	10%	✓		✓
Wendy's			✓	\$31.8	12%	✓		✓
Doctor's Associates	Subway		✓	\$30.9	6%	✓		✓
3G Capital	Burger King		✓	\$25.0	11%	✓		✓
Yum! Brands	Taco Bell		✓	\$22.4	7%	✓		✓
Darden Restaurants	Olive Garden		✓	\$19.2	12%	✓		✓
Yum! Brands	KFC		✓	\$14.8	6%	✓		
<b>Packaged foods and beverages</b>								
General Mills	Cheerios		✓	\$17.2	10%	✓		✓
Mars	M&Ms		✓	\$17.1	18%	✓		✓
Coca-Cola Co.	Coca-Cola Classic		✓	\$15.8	19%	✓		
Mars	Snickers		✓	\$14.0	34%		✓	✓
Hershey	Hershey Candy Bar		✓	\$13.0	21%			✓
Mars	Twix	✓	✓	\$12.8	34%		✓	
Dr Pepper Snapple Group	7UP			\$10.7	100%		✓	
Kraft Foods	Kraft Macaroni & Cheese			\$10.6	36%		✓	
Kraft Foods	Kraft Singles			\$10.5	46%		✓	
Hershey	Hershey's chocolate syrup		✓	\$10.0	37%		✓	
Mars	Orbit	✓	✓	\$9.6	35%		✓	
Hershey	Jolly Rancher		✓	\$8.7	35%		✓	
Mars	5 Chewing Gum	✓	✓	\$8.6	36%		✓	
Tyson Foods	Tyson Frozen Entrees	✓	✓	\$8.2	57%		✓	
Kraft Foods	Kraft Mayonnaise			\$4.9	100%		✓	
Kraft Foods	Oscar Mayer Deli Fresh			\$4.9	34%		✓	

\*Top-10 brands in 1) spending on Spanish-language TV advertising, 2) proportion of TV ad budgets allocated to Spanish-language TV, and/or 3) number of TV ads viewed by Hispanic children on Spanish-language TV.

\*Among brands spending \$4.5 million or more in advertising on Spanish-language TV

## Results

### Top Black-targeted brands\*

Company	Brand	Child/teen-targeted	Black-targeted	Black-targeted TV			Top-10 brand by		
				Ad spending (mill)	% of TV ad budget	Black:White teen ratio	Ad spending	Proportion of TV budget	Black:White teen ratio
<b>Restaurants</b>									
Wendy's			✓	\$9.6	3.7%	1.99	✓		
McDonald's		✓	✓	\$9.3	1.2%	1.83	✓		
Yum! Brands	Taco Bell		✓	\$8.5	2.8%	1.80	✓		
Doctor's Associates	Subway		✓	\$7.9	1.6%	1.67	✓		
Yum! Brands	Pizza Hut		✓	\$5.4	2.3%	1.62	✓		
Sonic			✓	\$4.8	2.3%	1.69	✓		
dineEquity	Applebees			\$4.4	3.0%	1.68	✓		
3G Capital	Burger King		✓	\$4.3	1.9%	1.66	✓		
Darden Restaurants	Olive Garden		✓	\$3.4	2.2%	1.49	✓		

<b>Packaged foods and beverages</b>									
Kellogg	Pop Tarts	✓	✓	\$4.2	14.3%	2.62	✓	✓	✓
Tyson Foods	Tyson Frozen Entrees	✓	✓	\$2.6	17.7%	2.36		✓	✓
PepsiCo	Lay's Potato Chips		✓	\$2.2	7.2%	2.20		✓	
Coca-Cola Co.	Coca-Cola Classic		✓	\$1.9	2.3%	3.24			✓
Unilever	Fruttare			\$1.7	10.6%	2.63		✓	✓
PepsiCo	Doritos	✓		\$1.5	6.1%	2.43			✓
Dr Pepper Snapple Group	7Up Ten			\$1.4	21.5%	2.11		✓	
Dr Pepper Snapple Group	Snapple			\$1.3	11.4%	2.18		✓	
Mars	Starburst	✓	✓	\$1.2	8.1%	2.33		✓	✓
Mars	Skittles	✓	✓	\$1.2	6.2%	2.26			✓
Unilever	Knorr Pasta Sides			\$1.1	14.3%	3.06		✓	✓
PepsiCo	Ruffles Ultimate Potato Chips	✓		\$1.0	7.3%	2.30		✓	✓
Dr Pepper Snapple Group	Sun Drop	✓		\$1.0	22.0%	2.48		✓	✓

\* Top-10 brands in spending on advertising on Black-targeted TV channels, proportion of TV advertising budgets allocated to Black-targeted TV, and/or greater relative exposure to TV ads by Black versus White teens.

\*Among brands spending \$1.0 million or more in advertising on Black-targeted TV

## Conclusions

### Food-related advertising targeted to Black and Hispanic youth likely contributes to health disparities affecting communities of color.

In evaluating companies' targeted marketing, it is important to recognize that food and beverage marketing designed to appeal directly to Hispanic and Black consumers is not problematic in and of itself. However, this research supports public health concerns about racial-ethnic targeted marketing practices of the largest restaurant, food, and beverage advertisers in the United States. These findings demonstrate that targeted food marketing likely contributes to health disparities affecting Black and Hispanic communities for three reasons: 1) It almost exclusively promotes brands in primarily unhealthy food categories; 2) Youth are exposed to relatively high amounts of advertising for these brands, especially Black children and teens; and 3) Companies utilize messages and other marketing techniques designed to increase the cultural relevance of their products (often nutrient-poor foods and beverages), especially those aimed at multicultural youth and Hispanic families.

Although researchers did not conduct a nutritional analysis of advertised products, the majority of food-related advertising targeted to Hispanic and Black youth promoted brands in nutritionally poor product categories, with a few exceptions. Cheerios ranked among the top brands targeted to Hispanic consumers and 7Up Ten diet soda ranked among the top Black-targeted brands, although none of these brands aimed their advertising at youth audiences. In addition, all gum and mint brands were targeted to Black and/or Hispanic consumers. On the other hand, fast-food

and other restaurants represented almost 40% of food-related advertising spending on Spanish-language and Black-targeted TV networks, as well as all TV advertising spending. Previous research has shown that the majority of fast-food TV ads viewed by children and teens promote products high in calories, fat, and/or sodium.<sup>67</sup> Additional primarily unhealthy categories also devoted a disproportionately high percentage of their advertising budgets to Spanish-language and/or Black-targeted TV. Of special concern is the exceptionally high amount of candy advertising targeted to Hispanic and Black consumers, as well as snack food brands targeting Black youth. In contrast, brands with generally more nutritious products – yogurt, other dairy, juice, water, and fruits and vegetables – were significantly less likely than other brands to target Hispanic and/or Black consumers. Together, advertising for these comparatively nutritious product categories comprised just 5% of spending on Spanish-language TV and 2% of spending on Black-targeted TV, compared with 6% of spending on TV in total.

Some companies were noteworthy for the amount, as well as the proportion, of their advertising spending devoted to targeted media. For example, Hershey spent more than any other company in advertising on Black-targeted TV and also allocated the highest proportion of its TV advertising to this medium. On Spanish-language TV, McDonald's, Mars, and General Mills each spent more than \$66 million in advertising, with Mars allocating almost one-quarter of its TV advertising budget to Spanish-language programming. Just four companies did not advertise at all on Spanish-language TV (Roark Capital Group and dineEquity restaurant companies, Dannon, and Ferrero), while five companies spent less than 0.5% of their TV advertising budgets on Black-targeted TV (Nestle, Campbell Soup, ConAgra, Post Foods, and Dannon).

Further, many brands with advertising targeted to Hispanic and Black consumers also aimed their advertising at children and adolescents. For example, McDonald's targeted its advertising to children under 12, as well as Hispanic and Black consumers. (Of note, previous research has shown that McDonald's advertising does not technically violate its CFBAI pledge, but that children often view TV advertising for McDonald's menu items that do not meet CFBAI nutrition standards.<sup>68</sup>) Twix targeted adolescents, Hispanic, and Black consumers, allocating one-third of its TV advertising budget to Spanish-language TV. Seven of the 13 top Black-targeted packaged-food brands also targeted their advertising to youth under 18, including Pop Tarts, Tyson Frozen Entrees (chicken nuggets and strips),

## Conclusions

Doritos, Starburst, Skittles, Ruffles Ultimate, and Sun Drop regular soda. Not one of these products would contribute to a healthy diet.

As a result, Hispanic and Black children and teens also were exposed to substantial amounts of TV advertising for primarily unhealthy product categories. Hispanic children viewed on average 2.2 food-related TV ads per day on Spanish-language TV – in addition to the ads they viewed on other television programming – while Hispanic teens viewed somewhat fewer Spanish-language ads per day (1.8). More than two-thirds of ads viewed by both Hispanic age groups promoted fast-food and other restaurants, candy, gum, snack foods, or sugary drinks, while just 3% promoted yogurt, other dairy, juice, water, or fruits and vegetables. Compared with White children and teens, Black youth viewed more than 70% additional food-related ads on TV, averaging 13.3 ads per day for Black children and 17.5 ads per day for Black teens. Candy, gum and mints, snacks, and sugary drinks contributed the most to this disproportionate exposure, with Black children and teens viewing 90% or more additional ads for brands in these categories compared with White children and teens.

Finally, many of the companies in this analysis touted the culturally relevant themes in their targeted marketing campaigns, especially those aimed at Hispanic consumers. Examples include Spanish-language websites aimed at Latino families (e.g., QueRicaVida, DiasGrandiosos, ComidaKraft, ElMejorNida) and philanthropic campaigns, such as sponsorships of youth sports and scholarships. On the surface, these programs support communities that could benefit greatly from additional funding. However, given that the majority of targeted products can contribute to health disparities affecting these communities, this practice also raises questions about companies' true commitment to improving the lives of Hispanic and Black consumers. Furthermore, a few companies – notably Coca-Cola Co., PepsiCo, and Dr Pepper Snapple Group – commonly utilize Black and Hispanic music and sports celebrities with “crossover” appeal aimed at teens to position their products as trendsetters in the youth market.

## RECOMMENDATIONS

Public health experts, advocates, and policymakers have proposed numerous obesity prevention actions at the local and state level to counteract the negative effects of unhealthy food and beverage marketing, such as taxes on sugary drinks, eliminating unhealthy food marketing from schools, placing warning labels on sugary drinks, and removing soda from kids' meals at restaurants. This report highlights the need for dramatic changes in targeted marketing practices from key stakeholders within industry, including food and beverage manufacturers, restaurants, grocery retailers, and media companies. To address disparities in obesity and other diet-related diseases affecting Hispanic and Black communities, especially among youth, stakeholders could improve self-regulatory programs regarding food advertising to children and take additional steps to improve the food marketing environment.

The majority of companies in this analysis belong to the CFBAI industry self-regulatory program, and numerous evaluations of the Initiative have demonstrated loopholes that allow participating companies to continue to advertise nutritionally poor foods to children.<sup>69-71</sup> Public health experts recommend several options to improve the efficacy of the program.<sup>72-74</sup> Due to greater exposure to media and food marketing, these improvements would also have the greatest benefit for Black and Hispanic youth:

- The definition of “healthier dietary choices” that can be advertised to children should be strengthened to include only products that are beneficial to children's health;
- The Initiative should address marketing to children up to at least age 14; and
- The definition of child-directed marketing should be expanded to include media where children constitute 25% or more of the audience: children are the primary target demographic; and/or the marketing strategies, techniques, characteristics, or venues have special appeal to children (as recommended by a Healthy Eating Research commissioned expert working group).<sup>75</sup>

Companies must also directly address their current racial-ethnic targeted marketing practices. Although the practices identified in this report likely benefit individual food and beverage, restaurant, and media companies in the short-term, they also contribute to poor diet among populations with some of the highest risk for obesity and other diet-related diseases. Therefore, they contribute to the enormous social and financial costs of these diseases, and the marketing cannot be sustained in the long-term.<sup>76</sup> Further, focusing public health resources on interventions that encourage consumers to make conscious healthier choices alone cannot effectively counteract a food



## Conclusions

environment that overwhelmingly promotes consumption of unhealthy choices. McKinsey,<sup>77</sup> the White House,<sup>78</sup> and public health advocates also urge key industry players to enact initiatives to improve the food marketing environment and make healthier choices the easiest, most affordable, and most socially acceptable options. Potential changes to targeted marketing practices that would improve the food marketing environment for Black and Hispanic youth include:

- Industry commitments to increase sales and marketing of healthier products – such as the Healthy Weight Commitment Foundation,<sup>79</sup> Partnership for a Healthier America,<sup>80</sup> American Beverage Association’s Balance Calories Initiative,<sup>81</sup> and the National Restaurant Association’s Kids LiveWell Program<sup>82</sup> – should also address advertising in Black- and Hispanic-targeted media, where healthier categories are now significantly underrepresented;
- Sugary drink, candy, and nutritionally poor snack food brands and fast-food restaurants – food and beverage categories that have been shown to directly contribute to obesity and other diet-related diseases among youth – should stop targeting their advertising to all young people under 18, including multicultural youth;

- Following the lead of the Walt Disney Company, which established nutrition standards for products advertised on its child-targeted media,<sup>83</sup> companies that own media properties with large audiences of Hispanic and/or Black youth should identify opportunities to improve the nutritional quality of foods advertised during targeted programming. For example, companies could establish standards for the amount of healthy versus unhealthy foods advertised or provide lower rates to advertise the healthiest products that do not currently advertise there (e.g., plain water, fruits, and vegetables).

Furthermore, public health advocacy campaigns should highlight marketing practices of companies that currently allocate disproportionately more of their advertising budgets to market unhealthy products to Black and Hispanic youth, as well as publicly support companies that may choose to direct marketing for their more nutritious products to these communities. Previous public health advocacy campaigns that have highlighted the best and worst marketing practices aimed at children and teens have been successful at encouraging industry to do the right thing for all children’s health.<sup>84</sup> Hispanic and Black consumers also could demand that companies improve the quality of foods marketed to their children and in their communities.

This report and these recommendations focus on TV food advertising and other forms of marketing to Hispanic and Black consumers, but these youth are not unique in their vulnerability to extensive marketing of unhealthy foods and beverages. Improving the food marketing environment for all young people, no matter who they are or where they live, would benefit public health for all.

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## Appendix A. Methods

Targeted marketing is the practice of designing marketing programs that appeal specifically to a group of consumers whom a company has identified as particularly attractive for their business,<sup>102</sup> also known as “culturally-specific” content or marketing. Methods developed by consumer behavior researchers to identify targeted marketing include measuring differences in the concentration of ad placements across different types of media (e.g., Spanish-language or Black-targeted media) and differences in exposure by viewers in different demographic groups, as well as identification of customized advertising content (e.g., cultural themes, actors).<sup>103</sup>

In this report, we detail marketing by restaurant and food and beverage companies targeted to Black and Hispanic consumers, focusing on advertising to children and adolescents. We include an examination of company statements about their targeted marketing practices and analyses of syndicated market research data from Nielsen.

### SCOPE OF ANALYSES

We conducted the research at the company and brand level, analyzing restaurant, food, and beverage companies that spent \$100 million or more on advertising in 2013 ( $n=23$ ) as well as all members of the Children’s Food and Beverage Advertising Initiative (CFBAI)<sup>104</sup> as of December 2014 ( $n=17$ ). We identified brands from the above companies that spent \$4.5 million or more on advertising in 2013 ( $n=302$ ) for further analysis. We then excluded brands that spent less than \$500,000 on television advertising in 2013 ( $n=27$ ) and brands marketed solely on local spot market television ( $n=8$ ), providing a final list of 267 brands.

We assigned all brands to one of the following categories: 1) food products (candy, cereal, food preparation/condiments, fruits and vegetables, gum/mints, prepared meals, savory snacks, sweet snacks, yogurt/other dairy products, and other); 2) beverages (diet soda, drink mix, juice/water, other sugary drinks, and regular soda); and 3) restaurants (fast-food and other).

### COMPANY STATEMENTS ABOUT TARGETED MARKETING

We first examined publicly available information about companies’ marketing programs to reach and/or appeal to specific segments of the population, including children, teens, millennials, parents, or families and multicultural, Spanish/Hispanic/Latino, or Black/African-American populations. Systematic searches of marketing trade press and reports and companies’ annual reports and press releases from 2012 to June 2015 identified companies’ statements about their targeted marketing practices.

Company statements were coded according to three primary reasons given for their targeted marketing strategies: 1) **Business opportunity** includes company statements or publications about Black, Hispanic, or minority consumers that discuss targeted marketing as a business growth opportunity. These statements may also include information about the group’s purchasing behavior. 2) **Cultural relevance** includes references to unique product offerings or marketing campaigns that aim to reach Black or Hispanic consumers by connecting to their cultures (e.g., through recipes, sports, music). 3) **Corporate responsibility** discusses companies’ philanthropic efforts to provide support (usually financial) to Black or Hispanic communities (e.g., educational resources, scholarships, food assistance).

### ANALYSES OF SYNDICATED MARKET RESEARCH DATA

As companies rarely disclose their marketing strategies publicly, we also utilized methods developed by consumer behavior researchers to identify targeted marketing using syndicated market research data from Nielsen. Targeted marketing can be identified by the amount of advertising placed in targeted media (e.g., Spanish-language TV, Black-targeted TV programming) and differences in the concentration of ad placements across different types of media and viewers.

## Appendix A. Methods

### MEASURES

The Nielsen data quantified media spending by company and brand, including amount spent to advertise on Spanish-language and Black-targeted TV channels. Nielsen data also provided the number of TV advertisements viewed (i.e., exposure) by Black, White, and all children and adolescents and exposure to advertising on Spanish-language TV by Hispanic children and adolescents. All data were collected for advertising in 2013.

#### Targeted television networks

All advertising on Spanish-language TV was considered to be targeted to Hispanic audiences. Spanish-language TV distributors included Azteca, Discovery en Español, Discovery Familia, ESPN Deportes, Estrella TV, FOX Deportes, Galavisión, GOL TV, mun2, MundoFox, MTV Tr3s, Telemundo, UniMás, Univisión, and Univisión Deportes. Networks were categorized as Black-targeted if more than 50% of a network's audience self-identified as Black according to Nielsen MarketBreaks. Black-targeted TV distributors included Badami Productions, BET, Central City Entertainment, Centric, NBA TV, TV One, and VH1.

#### Advertising spending

Nielsen tracks amount spent to purchase advertising in 18 different media. These data provide a measure of **advertising spending**. We licensed advertising spending data for all food, beverage, and restaurant categories for 2013 and report these numbers by brand, company, and category. We report the following advertising spending measures:

- **Total ad spending** includes the amount spent on all 18 media tracked by Nielsen including TV (including Spanish-language TV), Internet, radio, magazines, newspaper, free-standing insert coupons, and outdoor advertising.

- **Total TV ad spending** includes advertising expenditures on network, cable, syndicated, and spot (local) TV.
- **Spanish-language TV spending** includes advertising expenditures on all networks that broadcast in Spanish.
- **Black-targeted TV spending** includes advertising expenditures on all Black-targeted TV networks (i.e., those with an audience comprised of more than 50% Black viewers).

In addition, we calculated the percentage of company and brand total TV advertising spending devoted to Spanish-language and Black-targeted TV programming.

- **Spanish-language % of TV spending** was calculated by dividing Spanish-language TV spending by total TV spending.
- **Black-targeted % of TV spending** was calculated by dividing Black-targeted TV spending by total TV spending.

#### TV advertising exposure

To measure exposure to TV advertising, we also licensed **gross rating points (GRP)** data from Nielsen for the same period and companies. GRPs measure the total audience delivered by a company or brand's media schedule. It is 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. It is 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>105</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 an age or other demographic group (also known as target rating points or TRPs), and provide a per capita measure to examine relative exposure between groups. For example, if a brand had 2,000 GRPs in 2013 for 2- to 11-year-olds and 1,000 GRPs for 25- to 49-year-olds, then we can conclude that children saw twice as many ads for that brand in 2013 compared with adults.

In the exposure analyses, we obtained 2013 GRP data by age group and race. We first obtained total GRPs for the following age groups: children (2-11 years), teens (12-17 years), and adults (18-49 years). These data

## Appendix A. Methods

provide total exposure to national (network, cable, and syndicated) and local (spot market) TV combined. We also obtained GRPs for advertising viewed by Black and White youth in the same age groups on national TV only, as Nielsen does not provide spot market GRPs by race and age group. To assess exposure by Hispanic youth to Spanish-language advertising, we provide GRP data for advertising that occurred on Spanish-language TV.

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. GRPs can be difficult to interpret. Therefore, we also use GRP data to calculate the following TV advertising measures:

**Average ads viewed** 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 11-year-olds for a brand in 2013, we can conclude that on average all 2- to 11-year-olds viewed 20 ads for that brand in 2013. We report average number of ads viewed in 2013 for the following groups:

- **Children** for all viewers aged 2-11 years (combined national and spot TV)
- **Teens** for all viewers aged 12-17 years (combined national and spot TV)
- **Black children** for Black viewers ages 2-11 (national cable, network, and syndicated TV)
- **Black teens** for Black viewers ages 12-17 (national cable, network, and syndicated TV)
- **Hispanic children** for Hispanic viewers ages 2-11 on Spanish-language networks

- **Hispanic teens** for Hispanic viewers ages 12-17 on Spanish-language networks

As GRPs provide a per capita measure of advertising exposure for specific demographic groups, we also used GRPs to measure relative exposure to advertising between demographic groups. We report the following targeted GRP ratios:

- **Child:adult targeted ratio** = GRPs for children (2-11) / GRPs for adults (18-49)
- **Teen:adult targeted ratio** = GRPs for teens (12-17) / GRPs for adults (18-49)
- **Black:White child targeted ratio** = GRPs for Black children (2-11) / GRPs for White children (2-11). This measure uses only national GRPs.
- **Black:White teen targeted ratio** = GRPs for Black teens (12- 17) / GRPs for White teens (12-17). This measure only uses national GRPs.

A targeted ratio greater than 1.0 indicates that on average persons in the group of interest (e.g., children in the child:adult ratio) viewed more advertisements than persons in the comparison group (i.e., adults). A targeted ratio of less than 1.0 indicates that the person in the group of interest viewed fewer ads. For example, a child:adult targeted ratio of 2.0 indicates that children viewed twice as many ads as adults viewed. If this 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 this specific demographic group more often than would occur naturally. The average weekly amount of time spent viewing TV in 2013 was obtained from Nielsen Market Breaks for each age and demographic group in the analysis.

### Identifying targeted brands

We identified targeted marketing as brands that spent a significant amount to advertise on targeted television programming, as well as those with advertising that reached disproportionately more of the target audience.



## Appendix A. Methods

The following criteria identified brands with TV advertising targeted to Black and Hispanic consumers:

- Brands that spent \$100,000 or more to advertise on Spanish-language television were considered to be **Hispanic-targeted**.
- Brands that spent \$500,000 or more to advertise on Black-targeted networks were considered to be **Black-targeted**.

- Brands that spent over \$100,000 to advertise on Black-targeted networks and had a targeted ratio of 1.9 or greater<sup>i</sup> for Black versus White teens also were considered to be **Black-targeted**.

We also identified brands that appeared to target their advertising to children and teens:

- Brands with a child:adult targeted ratio of 1.5 or greater<sup>ii</sup> were considered to be **child-targeted**.
- Brands with a teen:adult targeted ratio of 0.9 or greater<sup>iii</sup> were considered to be **teen-targeted**.

<sup>i</sup> On average, in 2013, Black children watched 43% more television compared with White children and Black teens watched 68% more television than White teens. Therefore, a Black: White teen targeted ratio of 1.9 or higher indicates that companies placed their advertising in programming viewed disproportionately more often by Black youth.

<sup>ii</sup> In 2013, children watched 22% less television than adults watched. Therefore, a child:adult targeted ratio of 1.5 or higher indicates that companies placed their advertising in programming viewed disproportionately more often by children.

<sup>iii</sup> In 2013, teens watched 30% less television than adults watched, therefore a teen:adult targeted ratio of 0.9 or higher indicates that companies likely placed their advertising in programming viewed disproportionately more often by teens.

Appendix B.

## Company Statements About Targeted Marketing

## Appendix B. Company Statements About Targeted Marketing



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### 3G Capital

#### Cultural relevance

- Since 2012, Burger King has promoted its products to Hispanic consumers through partnerships with notable Hispanic celebrities, including Sofia Vergara and Salma Hayek, in Spanish-language ads for the company.<sup>1,2</sup> These ads generally promoted Burger King's healthier menu options,<sup>3</sup> although some unhealthy foods, such as chicken tenders, were also included.

## Appendix B. Company Statements About Targeted Marketing



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## Campbell Soup Company

### Business opportunity

- Campbell Soup Company highlighted the importance of reaching Hispanic consumers with President and CEO Denise Morrison noting the rapid growth of Hispanics as a consumer group.<sup>4</sup>

### Cultural relevance

- The company reported a multi-faceted approach to address Hispanic consumers, including new product varieties, community initiatives, targeted bilingual coupons, and television advertising.<sup>5,6</sup>
- The CampbellsKitchen.com website features a “Latin Inspired Collection,” noting the creative, bright, and bold flavors of Latino American cuisine.<sup>7</sup> Recipes on the site, available in both Spanish and English, include burritos, enchiladas, and empanadas and utilize Campbell products.
- In May 2014, Campbell Soup announced the launch of three “Latin-inspired” condensed soups. Senior Brand Manager Mark Tumelty suggested that these soups could be a way of creating flavorful dishes without many additional ingredients.<sup>8</sup>
- The company reported that new varieties of Pepperidge Farm Goldfish crackers were launched to attract Hispanic consumers, utilizing bilingual packaging for a number of its Pepperidge Farm products.<sup>9,10</sup>
- In Campbell Soup’s 2012 annual report, the company stated that it was “exploring ways to make V8 Splash drinks [a sugary fruit drink] even more relevant to the growing Hispanic market in the US,” particularly among Hispanic mothers and children.<sup>11</sup>

## Appendix B. Company Statements About Targeted Marketing



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### Coca-Cola Company

#### Business opportunity

- Bea Perez, VP and Chief Sustainability Officer, stated that focusing on multicultural, particularly Hispanic, consumers is vital to the company's future growth.<sup>12</sup> The company estimates that 86% of its growth through 2020 for its youth-targeted market will come from multicultural consumers.
- Seth Freeman, former Senior Brand Manager of African-American Marketing, noted that Black teens spend more money per month than teens of other ethnicities and have a strong cultural influence on other teens, singling this group out as a key target demographic.<sup>13</sup>
- Alba Castillo Adamo, Group Director of Hispanic Marketing, emphasized the role of Hispanic consumers both in the U.S. and abroad. Meaningfully connecting with Hispanic consumers was highlighted as part of Coca-Cola's marketing strategy, given this demographic group's high purchasing power.<sup>14</sup>

#### Cultural relevance

- Kimberly Paige, Assistant VP of African-American Marketing, highlighted the need to appeal to all consumers in a changing America.<sup>15</sup>
- Jose Torrens, Brand Manager for Multicultural Marketing, stressed Coca-Cola's "major focus on engaging Hispanics through their passion points – whether it be soccer, music, or food...all of our programs look to reach Hispanics through topics that matter most to them."<sup>16</sup>
- For over 30 years, Coca-Cola has sponsored the Mexican national soccer team. Lauventria Robinson, VP Multicultural Marketing, noted that 77% of U.S. Hispanics are of Mexican descent and the company will continue to support the Mexican national team.<sup>17</sup> During the 2014 World Cup, Coca-Cola aired a spot on Univision Deportes that celebrated the team.
- For several years Coca-Cola sponsored the BET Awards – considered an exceptional opportunity for advertisers to reach out to Black consumers. The company sponsored the "Coca-Cola Viewers Choice Award," with Coca-Cola branding and ads featured on the award website.<sup>18 19 20</sup> Coca-Cola has also been an exclusive sponsor of the Black-targeted cable channel Aspire and was given creative authority to develop programming for the channel.<sup>21</sup>

## **Coca-Cola Company (CONTINUED)**

### **Corporate responsibility**

- Coca-Cola is a sponsor of a number of philanthropic programs, including the Hispanic Scholarship Fund<sup>22</sup> and NAACP Project HELP (Healthy Eating, Lifestyles and Physical Activity).<sup>23</sup>
- In 2015, Coca-Cola expanded its “Pay it Forward” campaign, a Black history program giving four students an apprenticeship under leading Black icons such as Ne’Yo and Essence President, Michelle Ebanks. In 2015, students were given a chance to win \$5,000 scholarships and a three-day mentoring experience.<sup>24</sup>

## Appendix B. Company Statements About Targeted Marketing



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### ConAgra Foods, Inc.

#### Cultural relevance

- ConAgra maintains a Hispanic version of its recipe website, "Ready, Set, Eat."<sup>25</sup>
- In 2012, ConAgra partnered with MarketVision to gain deeper insight into Hispanic consumers.<sup>26</sup> Also in 2012, ConAgra became a client of VosLatinum, which captures quantitative data and qualitative insights into U.S. Hispanic consumers.<sup>27</sup>
- ConAgra has engaged in a brand partnership with Kraft for over a decade, for example pairing promotions of ConAgra's Ro\*Tel canned tomatoes with Kraft's Velveeta Cheese. New brand partnerships were launched in late 2013, with social media campaigns going beyond Facebook and Twitter to target Latino bloggers.<sup>28</sup>

#### Corporate responsibility

- ConAgra mentioned the prominence of child hunger among Latino populations in America in a 2015 company news release. The company pledged to donate up to three million meals in 2015 through the Child Hunger Ends Here program, thereby "empower[ing] a community of people to help change the realities of child hunger one meal at a time."<sup>29</sup>

## Appendix B. Company Statements About Targeted Marketing



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### Darden Restaurants

#### Cultural relevance

- Olive Garden aims to connect with the Hispanic community through a Spanish-language version of its website.<sup>30</sup> In 2010, Ad Age magazine stated that Olive Garden exemplified how marketers could reach the U.S. Hispanic market by placing ads on Spanish-language TV.<sup>31</sup>



Appendix B. Company Statements About Targeted Marketing



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## dineEquity

### Corporate responsibility

- Most dineEquity restaurants are franchises, and local efforts may not reflect executive marketing decisions. However, examples of philanthropic events at the local level include a 5-borough local tour in New York City in 2013 in support of Black History Month,<sup>32</sup> and a partnership with the local YMCA in Nashville, TN to raise funds for the branch's Latino Achievers Program.<sup>33</sup>

## Appendix B. Company Statements About Targeted Marketing



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### Doctor's Associates

#### Business opportunity

- From 2009 to 2013, Subway's Hispanic consumer traffic grew 40% versus 7% for non-Hispanic consumers. The company attributed this growth to "Hispanics go[ing] to fast food restaurants more often, in bigger groups, and order[ing] more items than non-Hispanics."<sup>34</sup>
- In a 2012 interview, Subway CMO Tony Pace noted the importance of the Hispanic market for Subway and said that the company had invested substantially in the U.S. Hispanic market.<sup>35</sup>

#### Cultural relevance

- In 2014, Subway partnered with Univision to better reach the Hispanic market. Gabriela Mangieri Harper, former Multicultural Marketing Manager, said, "This integration allows us to reach Hispanic audiences in an engaging and authentic way."<sup>36</sup>

## Appendix B. Company Statements About Targeted Marketing



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### Dr Pepper Snapple Group

#### Business opportunity

- Olivia Vela, Director of Multicultural Marketing, discussed in an online video how the company uses modern culture and language messages to target bilingual Hispanic youth to illustrate how the brand is “winning with this consumer and growing sales.”<sup>37</sup>
- Dr Pepper Snapple Group’s (DPSG) 2014 annual report states, “[w]e believe marketing and product innovations that target fast growing population segments, such as the Hispanic community in the U.S., could drive market growth.”<sup>38</sup>
- In July 2013, Vice President of Marketing Tim Cote referred to U.S.-born Hispanic millennials as “a growing segment” and explained that this group over indexes in traditional beverages, as well as in energy drinks, a more “American” beverage.<sup>39</sup>
- In 2009, DPSG hired Lopez Negrete Communications for the company’s Hispanic advertising efforts. The agency stated in an Advertising Age article that “our client’s volume is up in a challenging category, retailers are happy, and there is a strong, relevant relationship now between Latino youth and Dr Pepper that did not exist before.”<sup>40</sup>

## Dr Pepper Snapple Group (CONTINUED)

- Olivia Vela, Director of Multicultural Marketing, noted how the company directly targets Hispanics: “It’s about being relevant. Relationships are so important to this audience, and it is important to go to market in that way. It is perhaps a little different than efforts targeting other consumer segments.”<sup>41</sup>
- DPSG’s Chief Executive Officer, Larry Young, stated that the company introduced a Mexican mineral water brand to the United States to reach the Hispanic market. Young explains, “In our Hispanic programs in the U.S. we’re bringing in Penafiel from Mexico. We’re just starting right now, but are very excited by the results we’re seeing to date, and we’ll expand that... [w]e have very targeted Hispanic markets that we work in – we’re starting to get some real learnings from bringing the Penafiel in from Mexico.”<sup>42</sup>
- In 2009, Dr Pepper sponsored a traveling dance club in a semi-truck. Billboard Magazine reported that “the club and its music are geared toward bilingual, bicultural Hispanics, and the companion website, Vida23.com, features information in English and Spanish.”<sup>43</sup>
- Dr Pepper featured Pitbull, a Cuban American with a strong, young, urban, and Hispanic appeal, in English-language television ads. The musician’s “Vida 23” song was written to advertise Dr Pepper soda, referring to the 23 favors in the product. A Dr Pepper spokesperson cited Pitbull’s “crossover appeal” as particularly beneficial to the company. Dr Pepper maintains a promotions website in Spanish, and featured Pitbull’s hit song on it by allowing teenagers to share and remix the song. Advertising Age credited Dr Pepper’s 9.5% sales increase to U.S. Hispanics to this campaign.<sup>44</sup>
- After successfully launching a new luchador, El Nuevo Macho, Dr Pepper TEN became the official beverage sponsor for the 2013 Lucha Libre USA “Masked Warriors” Tour. According to Olivia Vela, Director of Multicultural Marketing, “the main idea behind the Lucha Libre USA campaign is to target... family men who are mostly Spanish-dominant Hispanics... Lucha Libre is a Hispanic campaign within a total market approach.”<sup>45</sup>
- In 2014, Dr Pepper partnered with Telemundo to create the “Los Unicos” sweepstakes. This seven-month platform used three Telemundo performers: Litzy, a Mexican singer and actress; Carmen Villalobos, a telenovela actress; and Eugenio Siller, the star of Telemundo’s original production of Reina de Carazones. These actors were chosen for their appeal as telenovela stars and popularity on social media. This campaign also included a co-branded calendar featuring 12 Telemundo stars, free with the purchase of Dr Pepper products.<sup>46</sup>
- Dr Pepper featured Latin music singer, Romeo Santos, in its “One of One” series highlighting unique individuals in the arts, business, sports, and entertainment industries. Santos, the only Latino in the 2014 campaign, was featured in a 30-second ad walking through the Bronx neighborhood where he grew up and discussing his music and heritage in the bachata style.<sup>47</sup>

## Corporate responsibility

- The company promotes Dr Pepper at soccer events and has sponsored the Dr Pepper Dallas Cup since 2006. This event is an international, youth soccer tournament where the company donates \$40,000 in sports gear to each of the eight winning teams.<sup>48</sup>

## Appendix B. Company Statements About Targeted Marketing



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### General Mills, Inc.

#### Business opportunity

- General Mills' 2014 annual report noted the growth of multicultural consumers, particularly Hispanic consumers. The company emphasized its array of products designed to meet Hispanic needs and noted its promotion of brands "in outlets where Hispanic consumers shop, with advertising messages that connect with this growing consumer demographic." Brands that demonstrated growth in Hispanic markets included Cinnamon Toast Crunch, Yoplait Go-Gurt, Nature Valley Snacks, and Totino's Pizza Rolls. To build on these successes, General Mills suggested promoting these brands on Spanish-language TV, TV shows with multicultural audiences, radio, and other digital and social media marketing outlets.<sup>50</sup>
- General Mills publicized its effort to target multicultural consumers, particularly Black and Hispanic groups. According to Mark Addicks, General Mills' CMO, this strategy also influences the general market. Addicks advised marketers to view Black consumers as market trendsetters who have a big influence on campaigns if engaged correctly.<sup>51 52 53</sup>

#### Cultural relevance

- To engage with Hispanic consumers, General Mills maintains a dual-language website, QueRicaVida.com. The site features coupons and recipes for General Mills products and lists specific brands as site sponsors.<sup>54</sup>
- In 2015, General Mills launched a web series aimed at Latinas, featuring bloggers from General Mills' website QueRicaVida "sharing their experiences around the modern Latina lifestyle."<sup>55</sup>
- General Mills CMO Mark Addicks discussed the benefits of hiring Burrell Communications, an advertising agency that specializes in developing campaigns aimed at Black consumers, to help launch products. Addicks explained that "Burrell helped [General Mills] launch Pillsbury Grands! Biscuit Sandwiches with African-American consumers as the brand champions who could influence the general market. The campaign featured custom music by gospel group Mary and digital and social media aspects, including a surprise event at Chicago's Union Station, integrations on Wendy Williams, in-store activities, and an activation at Steve Harvey's Hoodie Awards, which recognizes businesses and professionals across the nation that serve their communities."<sup>56</sup>

## **General Mills, Inc. (CONTINUED)**

- Addicks highlighted targeted marketing of other popular brands, stating that “some Cheerios advertisements target Black consumers,” and that Honey Nut Cheerios is a targeted brand that has particularly “resonated with African-Americans,”<sup>57</sup> also noting that Hamburger Helper radio and TV advertisements were directed towards Black consumers. Addicks also discussed a Yoplait ‘Curves’ campaign that was targeted to Black women.<sup>58</sup> In 2011, singer Tisha Campbell-Martin became a spokeswoman for Yoplait to encourage “African-American women to take charge of their health.”<sup>59</sup>

Appendix B. Company Statements About Targeted Marketing



## The Hershey Company

### Corporate responsibility

- The Hershey Company is a Medallion Sponsor of the Hispanic Heritage Foundation. This organization honors Latinos for their positive impact in the United States and abroad. The company annually presents awards at the Hispanic Heritage Foundation Awards.<sup>60</sup>

## Appendix B. Company Statements About Targeted Marketing



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## Kellogg Company

### Business opportunity

- Speaking at the 2012 Association of National Advertiser's Multicultural Marketing and Diversity Conference, Brad Davidson, former Kellogg's North America President, stressed that, "The Hispanic business opportunity is undeniable. Kellogg has integrated Hispanic [messaging] into every step of our business planning process".<sup>61</sup>
- Kellogg has noted an increasing focus upon advertising directed at Hispanic markets, with Brad Davidson emphasizing the Hispanic market as a core element of the company's strategy.<sup>62 63</sup>

### Cultural relevance

- Kellogg proposes that brands investing in the Hispanic market should place at least 10% of their media budget to Spanish-language TV and has done so with a number of its brands.<sup>64</sup>
- In 2014, Kellogg launched DiasGrandiosos.com, a website providing "culturally relevant" recipes and articles for Latina mothers.<sup>65</sup> In addition to recipes and advice, the site contains Kellogg coupons for its products.
- Initiatives to increase cultural relevance among Hispanic consumers include partnering with Univision to drive consumers to Kelloggs' Spanish-language website and producing more culturally relevant advertising, and sponsoring community events in markets with high densities of Hispanic consumers. Kellogg further operates a Family Rewards program in Spanish and English to consolidate brand loyalty.<sup>66 67</sup>



## Appendix B. Company Statements About Targeted Marketing



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## Kraft Foods

### Cultural relevance

- With its launch of ComidaKraft.com in 2000, Kraft is recognized as one of the first companies to create an integrated marketing campaign for a Latino audience.<sup>68</sup> Kraft's 2015 campaign to reach Hispanic consumers featured a Spanish-language website with more than 150 fast, budget-friendly food recipes intended to offer solutions for every occasion. This website was part of the company's "Twist that Dish" competition.<sup>69</sup>
- In 2012, Kraft launched a Spanish-language campaign for Kraft Macaroni and Cheese called "Sabemos que te va a encantar" (We know you're going to love it). Ads for the brand focused on perceived concerns among Hispanics about preserving one's culture while eating an American staple. Ads ended with the tagline, "Mantente 100% Latino" (Stay 100% Latino).<sup>70</sup>
- During the 2014 World Cup, Kraft targeted Hispanic consumers with its "Flavor of the Championship" program.<sup>71</sup>

## Appendix B. Company Statements About Targeted Marketing



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### Mars, Incorporated

#### Cultural relevance

- Since 2007, Mars has used the advertising agency LatinWorks for its campaigns. This agency specializes in reaching Hispanic consumers.<sup>72</sup>
- Mars has promoted brands such as Snickers,<sup>73 74</sup> Starburst,<sup>75</sup> and Twix<sup>76</sup> with Spanish-language ads and maintains Spanish-language websites for Starburst<sup>77</sup> and Snickers.<sup>78</sup>

#### Corporate responsibility

- In 2014-2015, Mars' Healthy Communities Program joined with the League of United Latin American Citizens (LULAC) to offer five \$5,000 grants to local LULAC councils to address problems related to poor health in Latino communities.<sup>79</sup>

## Appendix B. Company Statements About Targeted Marketing



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### Mondelez Global, LLC

#### Cultural relevance

- In 2013, Mondelez announced a three-year soccer sponsorship deal in time for the 2014 World Cup and 2016 Olympics in Brazil. As part of this deal, Mondelez became the official snack sponsor of the men's and women's national soccer team and official U.S. sponsor for the Mexican Club Deportivo Guagalajara. Stephen Chriss, Senior Director of Consumer Engagement and Marketing, explained Mondelez's sponsorship strategy, "For us it's about tapping into that cultural relevance of soccer and putting our brands on that stage."<sup>80</sup>
- The "Mondelez" company name is derived from the Latin words for "delicious" and "world." The name is intended to resonate with Hispanic communities, as this population has been key to the company's success since its inception as a spin-off from Kraft in 2012.<sup>81</sup>

## Appendix B. Company Statements About Targeted Marketing



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### McDonald's USA, LLC

#### Business opportunity

- McDonald's has noted that advertising and menu items targeting minority consumers also will grow its business among the general market by providing "early exposure to new trends."<sup>82</sup>
- To support its business objectives, McDonald's partners with Black and Hispanic/Latino communities. McDonald's website states, "We are dedicated to identifying and developing partnerships with key organizations in support of [the McDonald's brand]. By establishing and maintaining these relationships, we will build brand trust in diverse communities and increase our presence with diverse populations."<sup>83 84</sup>

#### Cultural relevance

- McDonald's CMO Neil Golden stated when discussing targeted marketing, "We adopted the principle 'Lead with ethnic insights,' which is about ensuring that we understand and apply ethnic consumer perspectives at every point in the marketing process. A foundational part of this idea in practice is our engagement with African-American consumers in their communities... [The Black 365 Initiative] serves as an umbrella for different engagements with the community, whether that's the Inspiration Celebration Gospel Tour, the All-American High School Basketball Games or our support for the Essence Music Festival. The name 365 Black says we are committed to being deeply rooted in the community 365 days a year, touching and connecting with consumers."<sup>85</sup>
- McDonald's maintains several websites aimed at specific audiences, including 365Black.com, MyInspirAsian.com, and MeEncanta.com.
- In 2014, Advertising Age named McDonald's as "Marketer of the Year" for its ethnic marketing strategies. Senior Director of U.S. Marketing Creative Aviles Jamison stated, "We make it our job to know our consumers, and the cultural things that are important to them, and recognize [that] this country is changing dramatically." Jamison highlighted that McDonald's has been a World Cup sponsor "forever" but previously focused its efforts on Hispanic consumers. Since soccer's appeal has grown, Avila adds, "McDonald's World Cup effort will be broader, and in both Spanish and English."<sup>86</sup>

## Appendix B. Company Statements About Targeted Marketing

- In 2013, McDonald's' FIFA soccer sweepstakes featured a Hispanic-led initiative. Cristina Vilella, Director of Marketing, stated, "what's phenomenal is that this [sweepstakes] started as a Hispanic-led initiative, but it evolved system wide."<sup>87</sup>
- Adam Salgado, VP of U.S. Marketing, has stated that to grow Hispanic consumption "McDonald's got deeply involved in music, including the Latin GRAMMY Awards; education, with a generous scholarship program; and sports like the World Cup."<sup>88</sup>
- In 2014, McDonald's started a two-week free McCafe coffee campaign. A Univision television star, Alejandra Espinoza, joined the campaign by serving free coffee at a drive-thru in a Miami McDonald's.<sup>89</sup>

## Corporate responsibility

- The company's targeted websites contain numerous links to activities to benefit the community. For example, 365Black.com features scholarships, employment information, music events, and volunteer opportunities; MyInspirAsian.com features an Asian phrase challenge game and a community events calendar; and MeEncanta.com offers college scholarships designed to provide financial assistance to Hispanic high school seniors.
- The National Hispanic Employee Business Network supports McDonald's with employment opportunities for Hispanics. Mark Moreno, McDonald's Vice President and General Manager of the Houston region, stated that "McDonald's understood long ago the importance of reaching the Hispanic population by helping Latino employees leverage their culture in a corporate environment."<sup>90</sup>
- The company's key partners featured on its website include a diverse set of Asian, Hispanic, and Black organizations. Current partners include the Asian American Justice Center, the National Association for the Advancement of Colored People, the National Urban League, the National Council of La Raza, the Organization of Chinese Americans, the Hispanic Association for Corporate Responsibility, the American Indian Scholarship Fund, the Asian Pacific Islander American Scholarship Fund, the League of United Latin American Citizens, the Asian Pacific Institute for Congressional Studies, the Congressional Black Caucus, and the Congressional Hispanic Caucus.
- McDonald's franchises also are active in their local communities, and sponsor numerous Black and Latino-targeted community events (i.e., soccer and basketball games, Camp McD's, and mentorship programs).

## Appendix B. Company Statements About Targeted Marketing



NESCAFÉ



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### Nestlé U.S.A.

#### Business opportunity

- Nestlé U.S.A. has voiced its commitment to the burgeoning U.S. Hispanic population. The company announced a new integrated marketing campaign targeting Hispanic consumers in 2011. This campaign, called “Construye el Mejor Nido” (Create the Best Nest) was designed to capitalize on the emotional attachment Hispanic consumers have to Nestlé brands in their home countries, while also introducing them to U.S.-based brands. Spanish-language TV, social media, in-store marketing, product sampling, and a Spanish-language website were all used to drive this communication.<sup>91</sup>

#### Cultural relevance

- To stay relevant with Hispanic consumers, Nestlé maintains a dual-language website ElMejorNido.com, featuring recipes, menu ideas, cooking videos, tips and techniques, as well as promoting a range of Nestlé brands.<sup>92 93</sup> Recipes further function as content marketing to promote Nestlé products.
- Nestlé engages second- and third-generation Hispanics in “All Your Celebraciones” magazine inserts.<sup>94</sup>

## Appendix B. Company Statements About Targeted Marketing



## PepsiCo, Inc.

### Cultural relevance

- PepsiCo has been described as a pioneer of multicultural marketing. Carlos Saavedra, Director of Culture Marketing, stated that the company aims to reach consumers of diverse ethnicities by creating marketing that has "crossover appeal."<sup>96 97 98</sup> PepsiCo routinely highlights music and sports as a means of transcending borders and cultures to maintain relevance. PepsiCo rebranded its multicultural team as the "Culture and Music Team" to reflect this marketing strategy.
- PepsiCo's original Pepsi brand has a long history of using Black and Hispanic celebrities and athletes to engage multicultural audiences while maintaining cross-cultural appeal. These paid spokespeople have included Beyonce, Nicki Minaj, Usher, Serena Williams, Usain Bolt, and James Rodriguez.<sup>99 100 101</sup>
- Music has been a key element of PepsiCo's efforts to engage Hispanic audiences. It has previously sponsored tours for major Latin musicians such as Ricky Martin, Shakira, and Alejandro Sanz.<sup>102</sup> In 2013, PepsiCo partnered with Tr3s, a music TV network geared towards young Hispanic viewers, to promote its Viva Hoy campaign, with sweepstakes to meet the popular Mexican DJ Trio 3BallMTY.<sup>103</sup>
- PepsiCo's Brisk iced tea brand launched its own "bodega" to reach Hispanic millennials, including a digital musical platform and summer music event series in 14 U.S. cities. The BriskBodega.com website features musicians, athletes, actors, and local celebrities.<sup>104</sup>
- PepsiCo's Mountain Dew brand was strongly criticized for insensitive and poorly conceived advertising aimed at multicultural urban audiences, leading to the withdrawal of its "Felicia the Goat" spot in 2013.<sup>105</sup>
- In May 2015, PepsiCo launched a new brand variety called Pepsi Limon to capitalize on the taste preferences of Hispanic consumers. According to a Pepsi press release, the product "captures the tart, refreshing taste that Hispanics love to enjoy." Limon is made with 2% lime juice and sugar, and the idea for the new product came from the company's Hispanic employee group, Adelante.<sup>106</sup>

## Appendix B. Company Statements About Targeted Marketing



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### Post Foods, LLC

#### Business opportunity

- In 2014, 100% of growth in Post's cereal portfolio reportedly came from Hispanic consumers.<sup>107</sup>

#### Cultural relevance

- In 2013, Post's cereal brand Honey Bunches of Oats launched its "Bunches of Beats" campaign. Jennifer Brain-Mennes, Director of Media and Public Relations, indicated that the campaign was aimed at general market and Hispanic audiences, but was driven by Hispanic insights. The first song launched with the campaign was "Smile While You Shake It," performed by a two-person Puerto Rican band called Domino Saints.<sup>108 109</sup>
- In 2013 and for several years prior, Post embarked on the multi-city "Tour Positivo," reaching out to Hispanic consumers and showcasing brands (particularly Honey Bunches of Oats) while providing musical entertainment.<sup>110</sup>
- Post maintains a Spanish-language version of its website, featuring recipes alongside coupons and promotions.<sup>111</sup>
- In 2013, Honey Bunches of Oats partnered with Walmart and Univision radio to offer New York and Los Angeles Latinos a shopping experience with celebrity DJs and a shuttle bus to Walmart. Two prominent Latina bloggers, recognized by the company as representing the voice of Latina moms, also helped promote the event.<sup>112</sup>



## Appendix B. Company Statements About Targeted Marketing



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### Roark Capital Group

#### Cultural relevance

- In 2014, Arby's CMO Rob Lynch noted the importance of appealing to a broader consumer base, "We will still appeal to our obvious demographic of [consumers ages] 18-34 that have the highest frequency of visits. But as consumers continue to become more diverse, we will explore marketing messages that appeal beyond our core."
- In 2015, Carl's Jr. and Hardee's unveiled the Thickburger El Diablo, termed "the hottest burger in fast food." According to CMA Brad Haley, the new burger was designed to appeal to a growing Hispanic market in the Southwest.<sup>113</sup>

## Appendix B. Company Statements About Targeted Marketing



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### Sonic

#### Cultural relevance

- In 2012, SONIC launched a bicultural website with a “distinctly Hispanic flair.”<sup>114</sup> Matt Schein, Senior Director of Marketing stated that the website was “important to engage our Hispanic customers by providing an online experience which parallels both their world and the feeling of visiting a nearby SONIC.” Patricia Burgos, Group Account Director at Lopez Negrete Communications – the agency SONIC used to create the website – said, “We go a step further and reflect our bicultural target’s lifestyle, combining the best of their Latino culture with their U.S. experience to create their unique world.” The company has since discontinued this website, but a Spanish-language menu remains available online.<sup>115</sup>
- Together with Spanish-language menus and websites, SONIC also developed a number of Spanish-language TV advertisements.<sup>116</sup>
- SONIC recently began promoting its products using prominent athletes that provide both minority and broader market appeal. In 2015, SONIC released TV ads for two new Slushy varieties, featuring NBA player Kevin Durant.<sup>117</sup>

## Appendix B. Company Statements About Targeted Marketing



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## Tyson Foods

### Cultural relevance

- In 2013, Jimmy Dean – a traditional American breakfast sausage brand – launched a Spanish-language TV commercial. Commenting on the ad campaign, Amy Grabow, former VP of Marketing at Jimmy Dean said, “We are excited to be venturing into such a rich territory with such an important consumer target. We feel the spot delivers on strong cultural insights and superior creativity that will help deliver our messages in a meaningful and fun manner.”<sup>118</sup>

### Corporate responsibility

- In 2014, Tyson partnered with the League of United Latin American Citizens (LULAC) to donate five truckloads of food to food banks in urban areas of Washington D.C., New York, Los Angeles, Houston, and Miami.<sup>119</sup>

## Appendix B. Company Statements About Targeted Marketing



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## Unilever United States

### Cultural relevance

- Hispanic consumers are noted as an important consumer group for Unilever: “At Unilever, we always strive to develop programs that connect with Hispanic consumers in the most relevant way... Understanding how Hispanics socially engage helps us to create more effective marketing campaigns for our brands” said Russel Lilly, Marketing Director of the Multicultural Marketing Team.<sup>120</sup>
- Unilever has long sought engagement with Hispanic consumers. In 2007, it launched “Vive Mejor” (Live Better), a Spanish-language integrated marketing campaign to promote the company’s food and personal care brands to Latinas through digital, TV, print media, and retail marketing programs.<sup>121 122</sup> In 2012, Unilever added live events targeting Latino families to the campaign, such as in-store beauty and cooking demonstrations.<sup>123</sup>

## Appendix B. Company Statements About Targeted Marketing



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### Wendy's

#### Business opportunity

- Wendy's has emphasized an increased effort to reach Hispanic consumers as part of their overall brand transformation.<sup>124</sup> Craig Bahner, former Wendy's CMO, and Liz Geraghty, VP of Brand Marketing, both noted the growing purchasing power of Hispanic consumers.<sup>125 126</sup>

#### Cultural relevance

- In 2013, Wendy's reached out to Hispanic consumers with its "Mucho Mejor" (So Much Better) ad campaign, featuring the "Rojos" family. The campaign was intended to convey the shared values of Wendy's and the Hispanic community, including "the importance of family, quality food, and striving for betterment."<sup>127</sup>

## Appendix B. Company Statements About Targeted Marketing



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### Yum! Brands

#### Business opportunity

- Commenting on strategies to position Taco Bell for future growth, CEO Brian Niccol noted the Hispanic market as a key target group.<sup>128</sup>
- In 2014, Taco Bell attributed its growth to the Hispanic oriented “Live Mas” (Live More) campaign with insights later applied to KFC and Pizza Hut restaurants.<sup>129</sup>

#### Cultural relevance

- Taco Bell, KFC, and Pizza Hut all used Spanish-language marketing communications to appeal to Hispanic consumers, including Spanish-language TV and/or web ads.<sup>130</sup>
- In 2014, Pizza Hut announced a major brand overhaul, which included launching Spanish-language ordering sites.<sup>131</sup>
- Also in 2014, KFC launched a Hispanic targeted ad campaign, emphasizing how the Hispanic community can be united around the dinner table by sharing KFC fried chicken, chicken tenders, and hot wings.<sup>132</sup>
- In 2015, KFC promoted its \$5 Fill Ups in a Hispanic-directed ad campaign comparing a rushed American lunch with a Spanish “almuerzo.”<sup>133</sup>

Appendix B. Company Statements About Targeted Marketing

**FERRERO**



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**Ferrero U.S.A., Inc.**



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**The Dannon Company**

Researchers did not find any published information or company statements from Ferrero or Dannon regarding marketing targeted to Hispanic or Black consumers.

The Rudd Center report entitled “Food advertising targeted to Hispanic and Black youth: Contributing to health disparities” is an independent publication and has not been authorized, sponsored, or otherwise approved by 3G Capital, Campbell Soup Company, Coca-Cola Company, ConAgra Foods, Inc., The Dannon Company, Darden Restaurants, dineEquity, Doctor’s Associates, Dr Pepper Snapple Group, Ferrero U.S.A., Inc., General Mills, Inc., The Hershey Company, Kellogg Company, Kraft Foods, Mars, Incorporated, Mondelez Global, LLC, McDonald’s USA, LLC, Nestle USA, PepsiCo, Inc., Post Foods, LLC, Roark Capital Group, Sonic, Tyson Foods, Unilever United States, Wendy’s, or Yum! Brands.

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## Appendix C.

# Supplemental Tables

**TABLE 1. TARGETED ADVERTISING BY COMPANY**

**TABLE 2. BRANDS TARGETED TO HISPANIC CONSUMERS**

**TABLE 3. BRANDS TARGETED TO BLACK CONSUMERS**

**TABLE 4. ALL OTHER BRANDS**

Appendix C. Supplemental Tables

TABLE 1. TARGETED ADVERTISING BY COMPANY

Company	Total ad spending (000)	All TV					Spanish-language TV				Black-targeted TV		Black youth exposure (all TV)			
		Total TV ad spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (Hisp. 2-11)	Ads viewed (Hisp. 12-17)	Spending (000)	% of TV ad spending	Ads viewed (2-11)	Ads viewed (12-17)	Black/White child ratio (2-11)	Black/White teen ratio (12-17)
McDonald's	\$992,536	\$774,786	301.7	262.1	1.04	0.90	\$75,314	9.7%	67.9	54.7	\$9,827	1.3%	417	386	1.60	1.83
General Mills	\$837,941	\$797,203	923.3	677.4	1.23	0.90	\$33,341	8.3%	99.9	72.7	\$7,396	0.9%	1,314	1,007	1.54	1.70
PepsiCo	\$822,794	\$640,951	144.5	279.7	0.42	0.81	\$35,734	5.6%	34.2	28.4	\$17,974	2.8%	261	469	2.05	1.89
Yum! Brands	\$822,732	\$800,794	181.0	364.5	0.40	0.80	\$49,145	6.1%	58.1	46.6	\$16,380	2.0%	288	552	1.81	1.69
Kraft Foods	\$612,232	\$370,565	173.0	196.8	0.75	0.85	\$47,952	12.9%	53.5	45.5	\$2,307	0.6%	243	280	1.52	1.57
Kellogg	\$560,476	\$418,423	269.4	292.2	0.81	0.88	\$48,923	11.7%	55.7	41.2	\$10,220	2.4%	413	472	1.66	1.76
Doctor's Associates (Subway)	\$557,654	\$507,227	117.6	195.6	0.45	0.76	\$30,854	6.1%	28.2	25.4	\$7,897	1.6%	167	270	1.75	1.67
Hershey	\$536,061	\$518,713	287.1	514.1	0.43	0.76	\$46,582	9.0%	80.4	64.1	\$22,985	4.4%	517	845	2.09	1.85
Mars	\$472,442	\$303,846	116.8	244.6	0.43	0.91	\$71,554	23.5%	122.6	106.0	\$11,226	3.7%	231	435	2.27	2.00
Nestle	\$361,345	\$267,682	115.0	152.2	0.52	0.69	\$25,737	9.6%	25.9	18.3	\$1,127	0.4%	179	235	1.72	1.67
Campbell Soup Co.	\$305,081	\$193,170	92.9	88.1	0.70	0.66	\$9,206	4.8%	13.4	9.3	\$450	0.2%	131	122	1.46	1.46
Coca-Cola Co.	\$301,830	\$227,402	25.7	47.0	0.39	0.71	\$20,963	9.2%	9.6	8.8	\$5,205	2.3%	49	85	2.30	2.11
Wendy's	\$289,834	\$257,233	93.7	143.7	0.55	0.85	\$31,836	12.4%	37.4	31.3	\$9,569	3.7%	149	236	1.93	1.99
3G Capital	\$264,222	\$239,749	55.5	111.3	0.35	0.70	\$25,017	10.4%	35.5	28.4	\$4,345	1.8%	88	160	1.84	1.66
Roark Capital Group	\$245,367	\$223,026	35.4	61.8	0.37	0.64	\$0	0.0%	0.0	0.0	\$1,061	0.5%	31	53	1.62	1.47
dineEquity	\$220,317	\$209,974	80.4	99.1	0.52	0.64	\$0	0.0%	0.0	0.0	\$4,429	2.1%	115	145	1.52	1.57
Sonic	\$221,486	\$209,189	52.8	99.5	0.42	0.80	\$13,050	6.2%	19.6	14.0	\$4,759	2.3%	80	142	1.88	1.69
Darden Restaurants	\$208,692	\$202,306	56.9	94.0	0.40	0.67	\$19,207	9.5%	30.3	22.3	\$3,439	1.7%	82	120	1.58	1.37

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Appendix C. Supplemental Tables

TABLE 1. TARGETED ADVERTISING BY COMPANY (CONTINUED)

Company	Total ad spending (000)	All TV					Spanish-language TV				Black-targeted TV		Black youth exposure (all TV)			
		Total TV ad spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (Hisp. 2-11)	Ads viewed (Hisp. 12-17)	Spending (000)	% of TV ad spending	Ads viewed (2-11)	Ads viewed (12-17)	Black/White child ratio (2-11)	Black/White teen ratio (12-17)
Dr Pepper Snapple Group	\$180,683	\$146,225	33.1	69.1	0.44	0.93	\$20,330	13.9%	10.7	9.8	\$6,153	4.2%	59	114	2.16	1.93
Tyson Foods	\$159,519	\$121,068	63.2	86.2	0.49	0.66	\$8,196	6.8%	10.9	7.1	\$3,910	3.2%	103	136	1.76	1.68
Mondelez Global	\$158,924	\$112,625	78.0	118.4	0.65	0.98	\$4,090	3.6%	8.0	7.0	\$3,441	3.1%	127	186	1.82	1.75
ConAgra Foods	\$158,823	\$116,299	60.4	70.2	0.59	0.69	\$8,941	7.7%	11.5	8.7	\$0	0.0%	86	97	1.53	1.48
Unilever	\$144,385	\$111,624	33.5	50.3	0.44	0.67	\$6,050	5.4%	8.5	6.0	\$4,811	4.3%	55	79	2.23	2.11
Post Foods	\$90,094	\$70,625	70.5	52.7	1.09	0.82	\$9,669	13.7%	13.4	10.7	\$297	0.4%	94	81	1.47	1.75
Groupe Danone	\$86,143	\$78,131	51.1	40.5	0.84	0.67	\$0	0.0%	0.0	0.0	\$74	0.1%	70	61	1.45	1.63
Ferrero	\$54,122	\$42,604	16.2	24.1	0.48	0.72	\$7	0.0%	0.0	0.0	\$1,920	4.5%	30	44	1.97	1.97
<b>Total</b>	<b>\$9,655,736</b>	<b>\$7,961,443</b>	<b>3,528.7</b>	<b>4,435.2</b>	<b>0.64</b>	<b>0.80</b>	<b>\$674,700</b>	<b>8.5%</b>	<b>835.2</b>	<b>666.3</b>	<b>\$161,203</b>	<b>2.0%</b>	<b>5,377</b>	<b>6,812</b>	<b>1.71</b>	<b>1.75</b>
<b>Company average</b>	<b>\$371,374</b>	<b>\$306,209</b>	<b>135.7</b>	<b>170.6</b>	<b>0.59</b>	<b>0.77</b>	<b>\$25,950</b>	<b>7.9%</b>	<b>32.1</b>	<b>25.6</b>	<b>\$6,200</b>	<b>2.1%</b>	<b>207</b>	<b>262</b>	<b>1.79</b>	<b>1.74</b>

Appendix C. Supplemental Tables

TABLE 2. BRANDS TARGETED TO HISPANIC CONSUMERS\*

Company	Brand	Category	Child/teen targeted	Black targeted	All TV					Spanish-language TV			
					Total TV spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (Hispanic 2-11)	Ads viewed (Hispanic 12-17)
McDonald's	McDonald's	Fast food	✓	✓	\$774,362	301.6	262.1	1.04	0.90	\$75,246	9.7%	67.9	54.7
Wendy's	Wendy's	Fast food		✓	\$257,215	93.7	143.7	0.55	0.85	\$31,836	12.4%	37.4	31.3
Doctor's Associates	Subway	Fast food		✓	\$507,129	117.6	195.6	0.45	0.76	\$30,854	6.1%	28.2	25.4
3G Capital	Burger King	Fast food		✓	\$226,610	54.6	109.7	0.35	0.71	\$25,017	11.0%	35.5	28.4
Yum! Brands	Taco Bell	Fast food		✓	\$302,328	69.8	155.6	0.39	0.88	\$22,364	7.4%	24.5	20.9
Darden Restaurants	Olive Garden	Other restaurant		✓	\$158,968	42.0	70.3	0.41	0.68	\$19,207	12.1%	30.3	22.3
General Mills	Cheerios	Cereal		✓	\$165,825	108.7	92.0	0.86	0.73	\$17,214	10.4%	25.6	18.7
Mars	M&Ms	Candy		✓	\$93,817	30.0	55.3	0.41	0.75	\$17,063	18.2%	28.8	24.6
Coca-Cola Co.	Coca-Cola Classic	Regular soda		✓	\$84,918	5.5	8.6	0.46	0.73	\$15,793	18.6%	7.0	5.9
Yum! Brands	KFC	Fast food		✓	\$257,303	45.2	83.0	0.38	0.69	\$14,842	5.8%	15.9	12.7
Mars	Snickers Candy Bar	Candy		✓	\$41,849	11.0	21.2	0.39	0.75	\$14,040	33.5%	22.6	19.3
Sonic	Sonic	Fast food		✓	\$209,189	52.8	99.5	0.42	0.80	\$13,050	6.2%	19.6	14.0
Hershey	Hershey's Candy Bar	Candy		✓	\$61,068	27.6	49.3	0.42	0.76	\$12,950	21.2%	22.7	18.0
Mars	Twix	Candy	✓	✓	\$37,322	16.8	39.6	0.45	1.06	\$12,784	34.3%	22.5	19.5
Yum! Brands	Pizza Hut	Fast food		✓	\$237,177	64.8	124.6	0.42	0.80	\$11,940	5.0%	17.7	13.0
Dr Pepper Snapple Group	7Up	Regular soda			\$10,707	0.0	0.0	0.89	0.79	\$10,705	100.0%	2.7	2.4
Kraft Foods	Kraft Macaroni and Cheese	Prepared meals			\$29,189	4.9	7.9	0.43	0.69	\$10,596	36.3%	10.7	9.7
Kraft Foods	Kraft Singles	Yogurt/other dairy			\$22,923	2.9	4.6	0.34	0.54	\$10,456	45.6%	11.7	9.6
General Mills	Cinnamon Toast Crunch	Cereal	✓		\$38,602	88.6	52.5	2.13	1.26	\$10,362	26.8%	15.2	11.5

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Appendix C. Supplemental Tables

TABLE 2. BRANDS TARGETED TO HISPANIC CONSUMERS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Black targeted	All TV					Spanish-language TV			
					Total TV spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (Hisp. 2-11)	Ads viewed (Hisp. 12-17)
Hershey	Hershey's Chocolate Syrup	Food prep/condiments		✓	\$27,099	10.8	18.1	0.42	0.71	\$9,967	36.8%	16.4	13.3
PepsiCo	Pepsi	Regular soda		✓	\$89,984	8.8	18.5	0.38	0.80	\$9,753	10.8%	5.8	4.9
Post Foods	Honey Bunches of Oats	Cereal			\$40,228	11.9	15.0	0.35	0.44	\$9,669	24.0%	13.4	10.7
Dr Pepper Snapple Group	Dr Pepper	Regular soda		✓	\$49,704	6.0	12.4	0.41	0.84	\$9,625	19.4%	8.0	7.4
Mars	Orbit	Gum/mints	✓	✓	\$27,800	7.4	17.2	0.39	0.92	\$9,596	34.5%	16.8	15.1
Hershey	Jolly Rancher	Candy		✓	\$24,817	9.5	17.4	0.42	0.77	\$8,742	35.2%	14.8	12.0
Mars	5 Chewing Gum	Gum/mints	✓	✓	\$23,706	8.9	20.7	0.44	1.02	\$8,574	36.2%	16.0	13.9
General Mills	Nature Valley Snack Bar	Sweet snacks			\$33,080	14.5	18.2	0.56	0.70	\$8,498	25.7%	11.9	8.6
Hershey	Hershey's Kisses	Candy		✓	\$50,275	25.4	43.2	0.43	0.74	\$8,275	16.5%	15.7	12.0
Tyson Foods	Tyson Frozen Entrees	Prepared meals	✓	✓	\$14,404	16.2	20.9	0.71	0.91	\$8,196	56.9%	10.9	7.1
Kellogg	Pop Tarts	Sweet snacks	✓	✓	\$29,342	22.2	42.3	0.65	1.23	\$7,702	26.3%	8.4	6.4
Kellogg	Special K	Cereal		✓	\$44,908	11.7	16.9	0.42	0.61	\$7,416	16.5%	6.8	5.1
General Mills	Totino's Pizza Rolls	Prepared meals			\$22,879	10.2	13.7	0.53	0.71	\$6,868	30.0%	11.8	9.0
Kraft Foods	Jell-O Pudding Snacks	Sweet snacks			\$21,856	3.1	5.0	0.43	0.68	\$6,764	30.9%	6.0	4.5
PepsiCo	Pepsi Next	Regular soda			\$28,236	4.6	8.3	0.38	0.69	\$6,666	23.6%	4.6	4.1
Hershey	Kit-Kat	Candy		✓	\$29,654	14.1	27.3	0.42	0.82	\$6,504	21.9%	10.6	8.6
Kellogg	Frosted Flakes	Cereal	✓		\$36,718	30.7	24.3	1.63	1.29	\$6,174	16.8%	5.9	4.3
Mars	Skittles	Candy	✓	✓	\$18,745	8.5	22.5	0.50	1.32	\$5,900	31.5%	11.5	9.9
PepsiCo	Quaker Oatmeal	Cereal			\$23,245	5.9	8.3	0.45	0.63	\$5,513	23.7%	6.1	4.6

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Appendix C. Supplemental Tables

TABLE 2. BRANDS TARGETED TO HISPANIC CONSUMERS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Black targeted	All TV					Spanish-language TV			
					Total TV spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (Hispanic 2-11)	Ads viewed (Hispanic 12-17)
General Mills	Progresso Soup	Prepared meals			\$29,301	8.4	10.2	0.37	0.45	\$5,247	17.9%	8.0	5.5
Nestle	Nestle Coffee-Mate Cream	Food prep/condiments			\$17,951	2.3	3.0	0.32	0.42	\$5,031	28.0%	4.8	3.5
Kraft Foods	Kraft Mayonnaise	Food prep/condiments			\$4,890	0.0	0.0	0.48	0.04	\$4,889	100.0%	5.4	4.8
Kraft Foods	Oscar Mayer Deli Fresh	Other			\$14,393	1.6	2.4	0.29	0.44	\$4,874	33.9%	5.9	4.7
Kellogg	Frosted Mini-Wheats	Cereal		✓	\$41,595	9.3	14.3	0.38	0.59	\$4,833	11.6%	4.0	2.8
Kraft Foods	Lunchables	Prepared meals	✓		\$21,284	56.5	47.6	2.60	2.19	\$4,427	20.8%	5.5	4.7
Nestle	Nescafe Classico Instant Coffee	Other			\$7,045	0.9	1.2	0.41	0.54	\$4,258	60.4%	4.1	2.7
Unilever	Knorr Seasonings	Food prep/condiments			\$4,741	0.0	0.0	0.21	0.29	\$4,245	89.5%	5.6	4.0
PepsiCo	Chee-tos Mix-Ups	Savory snacks	✓	✓	\$12,601	3.6	6.9	0.48	0.92	\$4,049	32.1%	7.1	6.3
General Mills	Yoplait Light	Yogurt/other dairy		✓	\$57,119	17.6	26.1	0.47	0.69	\$4,028	7.1%	5.2	3.7
Kellogg	Cheez-It Crackers	Savory snacks			\$24,790	6.7	11.3	0.39	0.65	\$4,018	16.2%	5.3	3.9
Kellogg	Eggo Waffles	Prepared meals		✓	\$31,342	17.2	18.3	0.69	0.74	\$3,991	12.7%	4.6	3.5
General Mills	Big G Cereals	Cereal	✓	✓	\$12,698	38.7	22.0	2.64	1.50	\$3,957	31.2%	5.3	3.9
Campbell Soup Co.	Prego Pasta Sauce	Food prep/condiments			\$15,013	2.7	3.5	0.35	0.45	\$3,646	24.3%	5.7	3.9
Mars	Extra	Gum/mints	✓	✓	\$6,292	3.2	6.7	0.44	0.91	\$3,333	53.0%	3.6	3.1
Kellogg	Pringles	Savory snacks			\$15,107	5.7	8.4	0.42	0.62	\$3,311	21.9%	4.6	3.5
Coca-Cola Co.	Powerade Sports Drinks	Other sugary drinks			\$17,519	0.3	0.6	0.30	0.51	\$3,244	18.5%	0.6	0.7
Kellogg	Special K Food Products	Other			\$23,772	5.9	8.9	0.40	0.61	\$2,968	12.5%	4.6	3.3
PepsiCo	Quaker Chewy Bar	Sweet snacks			\$15,001	3.8	5.4	0.45	0.64	\$2,748	18.3%	2.7	2.0

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Appendix C. Supplemental Tables

TABLE 2. BRANDS TARGETED TO HISPANIC CONSUMERS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Black targeted	All TV					Spanish-language TV			
					Total TV spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (Hisp. 2-11)	Ads viewed (Hisp. 12-17)
Campbell Soup Co.	Campbell's Homestyle Soup	Prepared meals			\$11,733	2.9	3.8	0.40	0.52	\$2,639	22.5%	2.4	1.7
Kellogg	Special K Crackers	Savory snacks			\$14,642	4.8	7.1	0.37	0.55	\$2,601	17.8%	2.6	1.9
PepsiCo	Tropicana Farmstand	Juice/water			\$24,144	4.5	6.5	0.40	0.58	\$2,425	10.0%	2.9	2.0
ConAgra Foods	Hunt's Sauce	Food prep/condiments			\$5,703	1.0	1.3	0.44	0.59	\$2,399	42.1%	2.8	2.1
General Mills	Pillsbury Toaster Strudel	Sweet snacks			\$28,536	17.9	24.1	0.51	0.68	\$2,183	7.7%	4.0	2.8
Campbell Soup Co.	V8 V-Fusion	Juice/water			\$7,224	1.6	2.1	0.29	0.40	\$2,167	30.0%	3.9	2.7
ConAgra Foods	Chef Boyardee Pasta Dinners	Prepared meals			\$6,189	3.0	2.8	0.85	0.78	\$2,155	34.8%	2.8	2.2
Mondelez Global	Trident	Gum/mints	✓	✓	\$10,661	5.8	14.3	0.49	1.23	\$1,995	18.7%	4.6	3.8
General Mills	Fiber One Snack Bar	Sweet snacks			\$33,364	14.3	19.5	0.44	0.60	\$1,969	5.9%	2.7	2.0
PepsiCo	Lay's Potato Chips	Savory snacks		✓	\$30,205	11.1	22.3	0.44	0.88	\$1,861	6.2%	1.6	1.1
Kellogg	Nutri-Grain Snack Bar	Sweet snacks			\$15,857	3.9	5.9	0.36	0.56	\$1,845	11.6%	2.4	1.7
ConAgra Foods	PF Chang's Home Menu Frozen Entrees	Prepared meals			\$4,039	2.1	3.2	0.42	0.63	\$1,827	45.2%	2.4	1.8
Unilever	Hellmann's/Best Foods Mayonnaise	Food prep/condiments			\$22,995	3.7	4.1	0.37	0.40	\$1,805	7.9%	2.9	2.1
Nestle	Coffee-Mate Non-Dairy Creamer	Food prep/condiments			\$8,948	1.6	2.3	0.34	0.47	\$1,748	19.5%	1.8	1.2
General Mills	Pillsbury Grands! Dough	Food prep/condiments		✓	\$34,589	17.6	21.9	0.47	0.59	\$1,691	4.9%	3.0	2.1
Kraft Foods	Philadelphia Cream Cheese	Yogurt/other dairy			\$19,798	5.4	8.5	0.35	0.56	\$1,458	7.4%	1.6	1.3
PepsiCo	Diet Pepsi	Diet soda			\$30,479	3.8	6.1	0.35	0.56	\$1,155	3.8%	0.7	0.6
General Mills	Yoplait	Yogurt/other dairy			\$42,039	10.2	13.9	0.50	0.68	\$1,144	2.7%	1.9	1.4
General Mills	Fiber One Brownies	Sweet snacks			\$13,715	4.4	6.0	0.43	0.59	\$1,140	8.3%	1.4	0.9

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Appendix C. Supplemental Tables

TABLE 2. BRANDS TARGETED TO HISPANIC CONSUMERS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Black targeted	All TV					Spanish-language TV			
					Total TV spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (Hisp. 2-11)	Ads viewed (Hisp. 12-17)
PepsiCo	Chee-tos Snacks	Savory snacks	✓	✓	\$17,507	10.9	19.9	0.49	0.90	\$1,026	5.9%	1.8	1.6
Nestle	Stouffers Frozen Entrees	Prepared meals			\$25,938	11.0	15.3	0.40	0.56	\$983	3.8%	1.6	1.2
General Mills	Lucky Charms	Cereal	✓	✓	\$20,408	70.4	38.1	2.76	1.50	\$953	4.7%	2.0	1.3
Coca-Cola Co.	Fuze Iced Tea	Other sugary drinks			\$901	0.0	0.0	0.00	0.00	\$900	99.9%	0.9	1.0
Mondelez Global	Nabisco	Sweet snacks		✓	\$21,370	6.5	12.0	0.47	0.87	\$851	4.0%	0.8	0.8
Campbell Soup Co.	Prego Homestyle Pasta Sauce	Food prep/condiments			\$6,301	1.6	1.9	0.39	0.46	\$755	12.0%	1.4	1.0
ConAgra Foods	Orville Redenbacher Pop-Crunch Popcorn	Savory snacks			\$6,935	1.7	2.6	0.43	0.68	\$746	10.8%	0.9	0.8
Kellogg	Raisin Bran	Cereal			\$19,004	7.1	10.0	0.46	0.64	\$704	3.7%	0.7	0.5
Coca-Cola Co.	Coke Zero	Diet soda			\$32,962	1.8	2.5	0.33	0.46	\$624	1.9%	0.3	0.3
PepsiCo	Mountain Dew Kickstart	Regular soda	✓	✓	\$16,853	4.4	11.6	0.38	1.00	\$539	3.2%	0.9	1.3
ConAgra Foods	Orville Redenbacher Pop-Up Bowl Popcorn	Savory snacks			\$5,355	0.6	0.9	0.33	0.50	\$481	9.0%	0.5	0.4
Coca-Cola Co.	Glaceau Vitaminwater	Other sugary drinks	✓	✓	\$15,196	3.4	9.9	0.43	1.24	\$240	1.6%	0.6	0.8
Mars	Starburst	Candy	✓	✓	\$14,390	10.1	26.8	0.53	1.39	\$219	1.5%	0.6	0.5
Kraft Foods	Mio Fit	Drink mix	✓	✓	\$16,465	5.5	13.1	0.39	0.93	\$189	1.1%	0.4	0.6
Hershey	Jolly Rancher Bites	Candy		✓	\$15,741	10.3	18.5	0.43	0.77	\$142	0.9%	0.2	0.2
Kraft Foods	Mio	Drink mix	✓		\$5,977	3.8	9.4	0.41	1.00	\$104	1.7%	0.4	0.6
<b>Total</b>					\$5,313,797	1,821.3	2,510.6			\$649,480		803.3	641.8
<b>Brand average</b>					\$55,780	19.8	27.3	0.54	0.75	\$7,060	22.0%	8.7	7.0

\*All brands spending \$100,000 or more in advertising on Spanish-language TV

Appendix C. Supplemental Tables

TABLE 3. BRANDS TARGETED TO BLACK CONSUMERS\*

Company	Brand	Category	Child/teen targeted	Hispanic targeted	All TV				Black-targeted TV		Black youth exposure (All TV)				
					Total TV spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (2-11)	Ads viewed (12-17)	Black:White child ratio (2-11)	Black:White teen ratio (12-17)
Wendy's	Wendy's	Fast food		✓	\$257,215	93.7	143.7	0.55	0.85	\$9,569	3.7%	148.9	235.8	1.93	1.99
McDonald's	McDonald's	Fast food	✓	✓	\$774,362	301.6	262.1	1.04	0.90	\$9,252	1.2%	416.6	385.6	1.60	1.83
Yum! Brands	Taco Bell	Fast food		✓	\$302,328	69.8	155.6	0.39	0.88	\$8,521	2.8%	120.5	246.3	2.01	1.80
Doctor's Associates	Subway	Fast food		✓	\$507,129	117.6	195.6	0.45	0.76	\$7,897	1.6%	166.9	270.0	1.75	1.67
Yum! Brands	Pizza Hut	Fast food		✓	\$237,177	64.8	124.6	0.42	0.80	\$5,373	2.3%	100.6	186.4	1.71	1.62
Sonic	Sonic	Fast food		✓	\$209,189	52.8	99.5	0.42	0.80	\$4,759	2.3%	79.8	141.7	1.88	1.69
dineEquity	Applebees	Other restaurant			\$174,152	47.4	71.5	0.46	0.70	\$4,364	3.0%	78.0	115.0	1.70	1.68
3G Capital	Burger King	Fast food		✓	\$226,610	54.6	109.7	0.35	0.71	\$4,345	1.9%	87.5	161.8	1.84	1.66
Kellogg	Pop Tarts	Sweet snacks	✓	✓	\$29,342	22.2	42.3	0.65	1.23	\$4,210	14.3%	52.2	92.2	2.93	2.62
Darden Restaurants	Olive Garden	Other restaurants		✓	\$158,968	42.0	70.3	0.41	0.68	\$3,439	2.2%	66.0	95.4	1.75	1.49
Tyson Foods	Tyson Frozen Entrees	Prepared meals	✓	✓	\$14,404	16.2	20.9	0.71	0.91	\$2,554	17.7%	30.3	42.2	2.05	2.36
Hershey	Reeses Peanut Butter Cups	Candy			\$67,322	31.4	59.3	0.43	0.81	\$2,537	3.8%	54.2	95.3	2.01	1.83
Yum! Brands	KFC	Fast food		✓	\$257,303	45.2	83.0	0.38	0.69	\$2,486	1.0%	66.8	119.4	1.65	1.58
PepsiCo	Gatorade Sports Drinks	Other sugary drinks	✓		\$89,813	15.6	33.1	0.48	1.02	\$2,352	2.6%	28.7	56.3	2.11	1.95
Mars	M&Ms	Candy			\$93,817	30.0	55.3	0.41	0.75	\$2,197	2.3%	53.9	91.8	2.06	1.86
PepsiCo	Lay's Potato Chips	Savory snacks		✓	\$30,205	11.1	22.3	0.44	0.88	\$2,163	7.2%	23.5	42.3	2.45	2.20
Hershey	Hershey's Kisses	Candy		✓	\$50,275	25.4	43.2	0.43	0.74	\$2,071	4.1%	44.8	70.7	2.05	1.84
Hershey	Hershey's Candy Bar	Candy		✓	\$61,068	27.6	49.3	0.42	0.76	\$2,005	3.3%	49.7	80.5	2.12	1.86
Coca-Cola Co.	Coca-Cola Classic	Regular soda		✓	\$84,918	5.5	8.6	0.46	0.73	\$1,923	2.3%	12.2	20.2	3.00	3.24

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Appendix C. Supplemental Tables

TABLE 3. BRANDS TARGETED TO BLACK CONSUMERS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Hispanic targeted	All TV					Black-targeted TV		Black youth exposure (All TV)			
					Total TV spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (2-11)	Ads viewed (12-17)	Black:White child ratio (2-11)	Black:White teen ratio (12-17)
PepsiCo	Tostitos Cantina Tortilla Chips	Savory snacks			\$31,295	11.7	25.3	0.39	0.84	\$1,755	5.6%	23.4	44.5	2.26	2.00
Unilever	Fruttare	Sweet snacks			\$15,719	5.2	10.5	0.41	0.82	\$1,672	10.6%	12.3	21.9	3.17	2.63
Mars	Twix	Candy	✓	✓	\$37,322	16.8	39.6	0.45	1.06	\$1,648	4.4%	35.7	71.2	2.49	2.02
General Mills	Cheerios	Cereal		✓	\$165,825	108.7	92.0	0.86	0.73	\$1,596	1.0%	155.8	134.5	1.62	1.76
PepsiCo	Doritos	Savory snacks	✓		\$24,281	6.2	14.1	0.42	0.95	\$1,487	6.1%	14.1	28.6	2.87	2.43
Mars	5 Chewing Gum	Gum/mints	✓	✓	\$23,706	8.9	20.7	0.44	1.02	\$1,392	5.9%	19.1	38.4	2.62	2.21
Dr Pepper Snapple Group	7Up Ten	Diet soda	✓		\$6,469	4.8	12.2	0.39	1.00	\$1,390	21.5%	10.5	21.9	2.91	2.11
Hershey	Payday	Candy			\$19,242	13.5	25.0	0.44	0.81	\$1,304	6.8%	24.9	42.3	2.18	1.92
Dr Pepper Snapple Group	Snapple	Other sugary drinks	✓		\$11,145	3.8	7.6	0.46	0.92	\$1,268	11.4%	7.4	13.5	2.43	2.18
PepsiCo	Chee-tos	Savory snacks	✓	✓	\$17,507	10.9	19.9	0.49	0.90	\$1,178	6.7%	19.6	33.4	1.99	1.89
Mars	Starburst	Candy	✓	✓	\$14,390	10.1	26.8	0.53	1.39	\$1,161	8.1%	24.1	54.6	2.78	2.33
Hershey	York Peppermint Pattie	Candy			\$18,503	12.6	22.6	0.43	0.76	\$1,159	6.3%	22.8	37.9	2.14	1.88
Mars	Skittles	Candy	✓	✓	\$18,745	8.5	22.5	0.50	1.32	\$1,155	6.2%	20.5	45.5	2.81	2.26
Coca-Cola Co.	Dasani Drops	Drink mix	✓		\$3,751	1.1	2.6	0.38	0.91	\$1,151	6.5%	2.0	4.3	2.10	1.86
Hershey	Almond Joy	Candy			\$17,988	12.4	22.1	0.42	0.76	\$1,135	6.3%	23.9	38.9	2.19	1.93
Unilever	Knorr Pasta Sides	Prepared meals			\$7,575	2.9	4.7	0.36	0.57	\$1,086	14.3%	7.5	11.3	3.30	3.06
Hershey	Kit Kat	Candy		✓	\$29,654	14.1	27.3	0.42	0.82	\$1,077	3.6%	25.3	44.2	2.07	1.80
Roark Capital Group	Arby's	Fast food			\$113,984	19.5	33.6	0.37	0.63	\$1,061	0.9%	19.3	31.5	1.64	1.46
PepsiCo	Ruffles Ultimate Potato Chips	Savory snacks	✓		\$14,006	7.8	17.1	0.41	0.90	\$1,027	7.3%	17.0	33.6	2.64	2.30

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Appendix C. Supplemental Tables

TABLE 3. BRANDS TARGETED TO BLACK CONSUMERS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Hispanic targeted	All TV				Black-targeted TV		Black youth exposure (All TV)				
					Total TV spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (2-11)	Ads viewed (12-17)	Black:White child ratio (2-11)	Black:White teen ratio (12-17)
Dr Pepper Snapple Group	Sun Drop	Regular soda	✓		\$4,606	4.7	11.3	0.76	1.84	\$1,014	22.0%	10.4	21.8	3.16	2.48
Hershey	Rolo	Candy			\$17,760	12.0	21.9	0.43	0.77	\$1,007	5.7%	21.3	35.6	2.07	1.84
Mars	Wrigley's Orbit	Gum/mints	✓	✓	\$27,800	7.4	17.2	0.39	0.92	\$996	3.6%	15.1	31.0	2.34	2.02
Ferrero	Tic Tac Breath Mints	Gum/mints			\$7,330	6.1	11.5	0.45	0.85	\$977	13.3%	13.2	23.1	2.48	2.26
PepsiCo	Pepsi	Regular soda		✓	\$89,984	8.8	18.5	0.38	0.80	\$969	1.1%	12.8	27.3	1.62	1.66
Hershey	Brookside Candy	Candy			\$21,335	10.8	17.7	0.44	0.72	\$946	4.4%	19.2	28.7	2.07	1.88
Kellogg	Krave	Cereal	✓		\$14,999	38.0	38.3	1.80	1.82	\$883	5.9%	54.5	62.5	1.69	1.85
Hershey	Ice Breakers	Gum/mints			\$13,412	9.7	17.5	0.42	0.76	\$878	6.5%	17.6	29.2	2.10	1.91
Hershey	Jolly Rancher Bites	Candy		✓	\$15,741	10.3	18.5	0.43	0.77	\$863	5.5%	19.1	31.4	2.10	1.88
Hershey	Hershey's Chocolate Syrup	Food prep/condiments		✓	\$27,099	10.8	18.1	0.42	0.71	\$863	3.2%	20.9	31.4	2.29	1.94
Hershey	Hershey's Drops	Candy			\$16,170	11.0	19.1	0.43	0.74	\$849	5.3%	20.1	31.9	2.13	1.86
Dr Pepper Snapple Group	Snapple Iced Tea	Other sugary drinks			\$11,451	3.6	6.4	0.46	0.82	\$839	7.3%	7.3	12.3	2.36	2.27
Mars	Snickers	Candy		✓	\$41,849	11.0	21.2	0.39	0.75	\$838	2.0%	20.2	34.4	2.09	1.80
Mondelez Global	Triscuit	Savory snacks			\$11,803	4.0	6.5	0.41	0.66	\$835	7.1%	6.9	10.2	1.81	1.73
Hershey	Ice Breakers Duo	Gum/mints			\$13,165	9.1	16.7	0.43	0.79	\$822	6.2%	17.4	28.8	2.24	1.94
Kraft Foods	Mio Fit	Drink mix	✓	✓	\$16,465	5.5	13.1	0.39	0.93	\$803	4.9%	8.3	18.2	1.82	1.62
General Mills	Pillsbury Grands! Dough	Food prep/condiments		✓	\$34,589	17.6	21.9	0.47	0.59	\$772	2.2%	25.6	30.7	1.81	1.80
Dr Pepper Snapple Group	Dr Pepper	Regular soda		✓	\$49,704	6.0	12.4	0.41	0.84	\$769	1.5%	8.9	17.5	1.84	1.67
PepsiCo	Pepsi Max	Diet soda			\$17,040	3.8	7.4	0.34	0.66	\$754	4.4%	7.4	12.6	2.12	1.88

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Appendix C. Supplemental Tables

TABLE 3. BRANDS TARGETED TO BLACK CONSUMERS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Hispanic targeted	All TV					Black-targeted TV		Black youth exposure (All TV)			
					Total TV spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (2-11)	Ads viewed (12-17)	Black:White child ratio (2-11)	Black:White teen ratio (12-17)
Mondelez Global	Oreo	Sweet snacks		✓	\$21,370	6.5	12.0	0.47	0.87	\$734	3.4%	12.7	22.0	2.29	2.13
Hershey	Hershey's Bliss	Candy			\$13,127	8.2	13.5	0.42	0.70	\$731	5.6%	15.3	23.6	2.10	1.89
PepsiCo	Doritos Jacked	Savory snacks	✓		\$7,036	2.7	6.5	0.42	1.00	\$730	10.4%	6.5	13.4	3.03	2.44
Kellogg	Frosted Mini Wheats	Cereal		✓	\$41,595	9.3	14.3	0.38	0.59	\$697	1.7%	15.2	21.1	1.68	1.52
Kellogg	Eggo Waffles	Prepared meals		✓	\$31,342	17.2	18.3	0.69	0.74	\$690	2.2%	27.5	29.0	1.67	1.69
Hershey	Hershey's Simple Pleasures	Candy			\$4,679	9.1	16.5	0.42	0.77	\$679	14.5%	15.8	26.0	2.01	1.75
Kellogg	Special K Cereal	Cereal		✓	\$44,908	11.7	16.9	0.42	0.61	\$597	1.3%	17.9	24.3	1.67	1.58
PepsiCo	Chee-tos Mix-ups	Savory snacks	✓	✓	\$12,601	3.6	6.9	0.48	0.92	\$597	4.7%	7.0	13.0	2.37	2.30
Hershey	Jolly Rancher	Candy		✓	\$24,817	9.5	17.4	0.42	0.77	\$592	2.4%	16.7	26.8	2.08	1.77
Hershey	Kit Kat Minis	Candy			\$14,818	8.6	16.2	0.42	0.80	\$589	4.0%	15.5	26.6	2.11	1.85
Hershey	Reeses Pieces	Candy			\$12,994	8.3	14.8	0.43	0.77	\$576	4.4%	14.6	23.9	2.08	1.81
Mondelez Global	Stride	Gum/mints	✓		\$5,635	2.4	6.2	0.42	1.05	\$575	10.2%	4.4	9.3	2.19	1.74
Mondelez Global	Trident	Gum/mints	✓	✓	\$10,661	5.8	14.3	0.49	1.23	\$574	5.4%	10.6	24.4	2.29	1.96
Hershey	Twizzlers Twists	Candy			\$13,985	9.4	16.6	0.43	0.77	\$570	4.1%	16.9	26.2	2.05	1.74
General Mills	Yoplait Light	Yogurt/other dairy		✓	\$57,119	17.6	26.1	0.47	0.69	\$555	1.0%	26.4	36.0	1.68	1.52
General Mills	Lucky Charms	Cereal	✓	✓	\$20,408	70.4	38.1	2.76	1.50	\$538	2.6%	101.4	63.4	1.53	1.88
Hershey	Twizzlers Candy	Candy			\$10,652	6.8	11.6	0.42	0.72	\$526	4.9%	11.5	17.5	1.98	1.73
PepsiCo	Mountain Dew Kickstart	Regular soda	✓	✓	\$16,853	4.4	11.6	0.38	1.00	\$516	3.1%	9.6	22.1	2.75	2.25
Coca-Cola Co.	Glaceau Vitaminwater	Other sugary drinks	✓	✓	\$15,196	3.4	9.9	0.43	1.24	\$512	7.6%	8.7	19.6	3.77	2.50

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Appendix C. Supplemental Tables

TABLE 3. BRANDS TARGETED TO BLACK CONSUMERS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Hispanic targeted	All TV				Black-targeted TV		Black youth exposure (All TV)				
					Total TV spending (000)	Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Spending (000)	% of TV ad spending	Ads viewed (2-11)	Ads viewed (12-17)	Black:White child ratio (2-11)	Black:White teen ratio (12-17)
Unilever	I Can't Believe It's Not Butter! Deliciously Simple	Food prep/condiments			\$4,732	1.4	2.0	0.37	0.55	\$481	10.2%	3.1	4.5	2.85	2.92
PepsiCo	Stacy's Pita Chips	Savory snacks			\$7,004	3.0	5.0	0.38	0.63	\$479	6.8%	5.7	8.9	2.12	1.95
Mars	Wrigley's Extra	Gum/mints	✓	✓	\$6,292	3.2	6.7	0.44	0.91	\$455	7.2%	6.9	13.1	2.36	2.25
PepsiCo	Tostitos Artisan Recipes Tortilla Chips	Savory snacks			\$5,603	1.7	3.1	0.35	0.62	\$449	8.0%	3.4	5.5	2.23	1.98
Mars	Snickers Bites	Candy	✓		\$7,324	4.0	9.0	0.42	0.94	\$424	5.8%	7.9	15.8	2.26	1.97
Unilever	Magnum Gold	Sweet snacks			\$8,626	2.4	3.8	0.37	0.60	\$419	4.9%	4.7	7.3	2.53	2.38
General Mills	Hamburger Helper	Prepared meals			\$7,238	4.6	7.4	0.52	0.82	\$394	5.4%	8.2	12.1	2.11	2.01
Mars	Snickers Peanut Butter Squared	Candy			\$4,424	2.4	5.1	0.39	0.83	\$296	6.7%	5.0	9.2	2.41	1.97
General Mills	Big G Cereals	Cereal		✓	\$12,698	38.7	22.0	2.64	1.50	\$273	2.1%	53.8	35.5	1.49	1.89
Kraft Foods	Kraft Salad Dressings	Food prep/condiments			\$6,707	1.5	2.9	0.34	0.65	\$271	4.0%	2.8	5.3	2.23	2.11
Coca-Cola Co.	Diet Coke	Diet soda	✓		\$17,657	3.1	6.5	0.44	0.91	\$243	2.9%	5.3	10.1	1.93	1.65
Unilever	Lipton Tea & Honey Iced Tea Mix	Drink mix			\$5,520	2.0	3.2	0.38	0.64	\$159	2.9%	3.8	6.2	2.18	2.10
Mondelez Global	Newtons	Sweet snacks			\$4,177	2.9	4.5	0.43	0.66	\$124	3.0%	5.8	7.8	2.10	1.97
Coca-Cola Co.	Sprite	Regular soda	✓		\$4,746	1.0	2.6	0.42	1.11	\$105	2.2%	3.0	6.6	5.80	4.13
<b>Total</b>					\$5,124,549	1,830.9	2,783.0			\$139,543		2,966.3	4,435.4		
<b>Brand average</b>					\$56,939	20.3	30.9	0.51	0.86	\$1,550	5.5%	33.0	49.3	2.23	2.00

\*All brands with 1) >\$500,000 in advertising spending on Black-targeted TV and/or 2) >\$100,000 in advertising on Black-targeted TV AND a Black/White teen ratio ≥1.9

Appendix C. Supplemental Tables

TABLE 4. ALL OTHER BRANDS\*

Company	Brand	Category	Child/teen targeted	Total TV ad spending (000)	TV ad exposure: All youth				TV ad exposure: Black youth			
					Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Ads viewed (2-11 yrs)	Ads viewed (12-17 yrs)	Black:White child ratio (2-11)	Black:White teen ratio (12-17)
dineEquity	IHOP	Other restaurant		\$62,822	33.0	27.6	0.65	0.54	36.5	30.1	1.24	1.26
Roark Capital Group	Carl's Jr	Fast food		\$59,692	8.9	15.7	0.39	0.69	6.4	12.2	1.60	1.51
Darden Restaurants	Longhorn Steakhouse	Other restaurant		\$43,338	14.9	23.7	0.39	0.63	15.9	24.1	1.13	1.05
Roark Capital Group	Hardee's	Fast food		\$38,062	5.8	10.8	0.34	0.62	4.5	8.3	1.56	1.41
Campbell's Soup Co.	Campbell's Chunky Soup	Prepared meals		\$35,442	8.3	11.7	0.33	0.47	11.0	13.9	1.34	1.18
Campbell's Soup Co.	Campbell's Soup, Condensed	Prepared meals		\$39,105	5.8	7.7	0.36	0.48	7.7	8.9	1.31	1.13
The Dannon Company	Dannon Activia	Yogurt/other dairy		\$27,186	6.8	8.4	0.34	0.43	11.6	12.5	1.89	1.56
The Dannon Company	Dannon Oikos	Yogurt/other dairy		\$26,983	6.8	8.7	0.35	0.45	11.6	13.2	1.82	1.59
General Mills	Yoplait Greek Yogurt	Yogurt/other dairy		\$23,575	7.1	11.1	0.40	0.63	11.5	16.1	1.77	1.58
Dr Pepper Snapple Group	Dr Pepper Ten	Diet soda		\$23,073	3.5	7.1	0.38	0.78	4.8	9.8	1.50	1.52
General Mills	Pillsbury Dough	Food prep/condiments		\$22,682	12.8	15.3	0.49	0.58	17.6	20.6	1.64	1.65
Nestle	DiGiorno Rising Crust Pizza	Prepared meals		\$20,893	9.7	15.2	0.36	0.56	16.2	23.8	1.80	1.64
Ferrero	Nutella	Food prep/condiments		\$20,421	5.9	7.6	0.48	0.61	9.7	12.4	1.73	1.70
The Dannon Company	Dannon Light & Fit	Yogurt/other dairy		\$19,082	5.1	6.7	0.33	0.43	8.6	9.6	1.71	1.44
Tyson Foods	Jimmy Dean Entrees	Prepared meals		\$18,989	4.5	6.6	0.41	0.59	6.7	9.1	1.62	1.42
Kraft Foods	Velveeta	Yogurt/other dairy		\$18,562	5.3	8.0	0.37	0.56	8.7	10.8	1.66	1.36
General Mills	Progresso Light Soup	Prepared meals		\$18,526	5.3	7.1	0.36	0.48	7.5	8.9	1.88	1.67
Mondelez Global	Ritz	Savory snacks		\$18,195	8.0	12.9	0.42	0.68	13.1	19.3	1.76	1.54
PepsiCo	Tropicana Trop50	Juice/water		\$18,082	2.9	4.4	0.36	0.54	4.1	5.4	1.44	1.24

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Appendix C. Supplemental Tables

TABLE 4. ALL OTHER BRANDS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Total TV ad spending (000)	TV ad exposure: All youth				TV ad exposure: Black youth			
					Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Ads viewed (2-11 yrs)	Ads viewed (12-17 yrs)	Black:White child ratio (2-11)	Black:White teen ratio (12-17)
PepsiCo	Diet Mountain Dew	Diet soda		\$17,154	3.8	7.9	0.35	0.73	5.9	10.2	1.62	1.34
Mondelez Global	Wheat Thins	Savory snacks		\$17,082	6.5	15.5	0.35	0.84	11.6	23.3	2.11	1.72
General Mills	Green Giant Vegetables, Frozen	Fruits and vegetables		\$17,076	6.7	8.3	0.46	0.56	8.3	10.0	1.60	1.62
ConAgra Foods	Marie Callendar Frozen Entrees	Prepared meals		\$16,821	6.5	9.5	0.37	0.54	9.4	12.0	1.53	1.32
Kraft Foods	Velveeta Macaroni and Cheese	Prepared meals		\$16,654	3.4	7.7	0.33	0.75	5.3	12.0	1.95	1.80
General Mills	Yoplait Go-Gurt	Yogurt/other dairy	✓	\$16,293	78.3	39.8	3.17	1.61	109.5	63.1	1.47	1.73
General Mills	Chex	Cereal		\$15,293	7.5	9.5	0.45	0.57	12.0	14.0	1.78	1.58
Nestle	Lean Cuisine Salad Additions	Prepared meals		\$15,028	3.6	5.4	0.33	0.49	5.8	8.0	1.78	1.56
Mars	Dove	Candy		\$14,897	8.2	14.3	0.38	0.67	13.8	21.4	1.87	1.62
Ferrero	Ferrero Rocher	Candy		\$14,853	4.2	5.1	0.54	0.65	6.6	8.1	1.64	1.75
Tyson Foods	Jimmy Dean Breakfast Bowls	Prepared meals		\$14,748	5.9	8.4	0.38	0.54	9.6	12.9	1.75	1.57
Nestle	Hot Pockets	Prepared meals	✓	\$14,744	7.4	21.1	0.47	1.35	15.4	39.0	2.47	2.09
Kraft Foods	Planters Nuts	Savory snacks		\$14,733	3.1	4.5	0.38	0.55	3.9	4.9	1.17	1.03
General Mills	Chicken Helper	Prepared meals		\$14,658	8.4	11.2	0.55	0.74	11.8	14.4	1.66	1.45
Campbell Soup Co.	V8 Vegetable Juice	Juice/water		\$14,570	4.1	5.8	0.33	0.46	6.1	7.7	1.44	1.30
Tyson Foods	Jimmy Dean Sausage	Other		\$14,322	6.1	7.7	0.45	0.56	10.1	12.0	1.76	1.65
Tyson Foods	Jimmy Dean Delights	Prepared meals		\$14,232	6.4	9.1	0.40	0.57	9.6	12.6	1.64	1.49
Coca-Cola Co	Simply Orange	Juice/water		\$13,837	3.5	4.8	0.34	0.46	6.1	7.1	1.93	1.61

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Appendix C. Supplemental Tables

TABLE 4. ALL OTHER BRANDS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Total TV ad spending (000)	TV ad exposure: All youth				TV ad exposure: Black youth			
					Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Ads viewed (2-11 yrs)	Ads viewed (12-17 yrs)	Black:White child ratio (2-11)	Black:White teen ratio (12-17)
Nestle	Haagen-Dazs	Sweet snacks		\$13,612	3.1	5.3	0.35	0.60	3.6	5.4	1.10	0.97
Post Foods	Great Grains	Cereal		\$13,593	4.5	5.9	0.33	0.43	6.9	8.5	1.65	1.51
Campbell Soup Co.	Pepperidge Farm Goldfish Crackers	Savory snacks	✓	\$13,396	51.0	30.8	4.16	2.51	71.1	50.0	1.48	1.91
Kraft Foods	Crystal Light	Drink mix		\$13,289	4.1	6.5	0.34	0.54	6.3	9.6	1.65	1.61
3G Capital	Tim Horton's	Fast food		\$12,858	0.9	1.5	0.24	0.39	0.0	0.0	0.05	0.80
General Mills	Nature Valley Sweet & Salty Nut Bar	Sweet snacks		\$12,767	7.0	9.4	0.54	0.72	10.7	14.3	1.70	1.66
PepsiCo	Muller Greek Corner	Yogurt/other dairy		\$12,718	5.7	8.9	0.42	0.65	9.1	13.0	1.68	1.58
Kellogg	Kellogg's To Go	Other sugary drink		\$12,707	4.0	6.2	0.41	0.63	6.8	9.5	1.78	1.61
Kraft Foods	Capri Sun Super V	Juice/water	✓	\$12,550	19.7	15.4	1.72	1.34	26.3	22.9	1.47	1.70
General Mills	Fiber One	Cereal		\$11,801	5.2	6.9	0.37	0.49	6.9	8.6	1.61	1.46
Kraft Foods	Oscar Mayer Carving Board Lunch Meat	Other		\$11,630	2.3	3.8	0.30	0.49	3.5	4.8	1.52	1.24
Mondelez Global	Belvita Cookies	Sweet snacks		\$11,602	6.4	10.1	0.39	0.62	9.6	12.9	1.55	1.31
Coca-Cola Co.	Minute Maid Pure Squeezed	Juice/water		\$11,286	2.1	3.4	0.40	0.65	3.3	5.0	1.68	1.55
Tyson Foods	Tyson Foods Grilled & Ready	Prepared meals		\$11,119	5.9	8.1	0.47	0.64	9.4	11.7	1.66	1.53
Coca-Cola Co.	Truvia Sweetener	Food prep/condiments		\$10,941	2.3	3.5	0.30	0.44	3.0	3.7	1.32	1.07
Dr Pepper Snapple Group	Diet Dr Pepper	Diet soda		\$10,324	3.3	6.5	0.43	0.84	5.2	9.5	1.70	1.59
Kraft Foods	Cracker Barrel Cheese	Yogurt/other dairy		\$10,304	1.5	2.6	0.32	0.55	2.5	4.0	1.71	1.62
Nestle	Carnation Breakfast Essentials	Food prep/condiments		\$10,136	3.6	5.3	0.38	0.56	5.9	7.2	1.81	1.44

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Appendix C. Supplemental Tables

TABLE 4. ALL OTHER BRANDS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Total TV ad spending (000)	TV ad exposure: All youth				TV ad exposure: Black youth			
					Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Ads viewed (2-11 yrs)	Ads viewed (12-17 yrs)	Black:White child ratio (2-11)	Black:White teen ratio (12-17)
Campbell Soup Co.	Pace Salsa	Food prep/condiments		\$10,085	2.8	3.8	0.34	0.46	4.3	4.9	1.59	1.27
Kellogg	Special K Frozen Entrees	Prepared meals		\$9,899	2.6	3.8	0.39	0.57	4.3	5.8	1.76	1.59
General Mills	Reeses Puffs	Cereal	✓	\$9,890	71.7	31.9	5.96	2.66	99.1	52.3	1.47	1.87
General Mills	Chex Mix	Savory snacks		\$9,826	9.1	11.5	0.56	0.71	12.7	15.4	1.46	1.36
Campbell Soup Co.	V8 V-Fusion	Other sugary drink		\$9,765	2.8	4.2	0.33	0.50	4.4	5.7	1.51	1.36
Campbell Soup Co.	Swanson Soup, Ready-to-serve	Prepared meals		\$9,732	2.6	3.2	0.36	0.44	3.4	3.8	1.33	1.16
PepsiCo	Mountain Dew	Regular soda	✓	\$9,619	2.5	5.6	0.39	0.90	3.9	8.5	1.76	1.63
Kraft Foods	Miracle Whip	Food prep/condiments		\$9,306	1.8	3.0	0.38	0.62	2.5	3.6	1.33	1.19
Kellogg	Rice Krispies	Cereal		\$9,280	4.7	6.8	0.40	0.57	7.8	10.1	1.70	1.51
Tyson Foods	Anytizers	Prepared meals		\$9,196	6.2	8.2	0.62	0.82	9.4	11.2	1.63	1.46
ConAgra Foods	PAM Non-stick Spay	Food prep/condiments		\$9,183	2.4	3.5	0.38	0.55	3.7	4.9	1.50	1.44
Kraft Foods	Oscar Mayer Select Hot Dogs	Other		\$9,135	2.0	3.4	0.32	0.54	2.8	4.1	1.50	1.28
General Mills	Progresso Heart Healthy Soup	Prepared meals		\$9,058	2.9	3.6	0.35	0.43	4.2	4.4	1.60	1.36
Dr Pepper Snapple Group	Canada Dry Ginger Ale	Regular soda		\$9,025	3.3	5.5	0.40	0.66	4.8	7.7	1.44	1.43
Nestle	Nestle Pure Life Bottled Water	Juice/water		\$9,011	4.5	3.6	0.68	0.54	6.4	5.8	1.54	1.71
General Mills	Nature Valley Protein Snack Bar	Sweet snacks		\$8,858	5.0	7.2	0.44	0.63	6.1	7.8	1.29	1.14
Kraft Foods	Kraft Foods Cheese	Yogurt/other dairy		\$8,723	1.6	2.2	0.35	0.48	2.3	3.1	1.44	1.41
Kellogg	Kashi GoLean	Cereal		\$8,591	2.3	3.1	0.37	0.50	3.7	4.4	1.62	1.48
Kraft Foods	Oscar Mayer Bacon	Other		\$8,462	1.7	2.9	0.31	0.52	2.9	3.9	1.84	1.43

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Appendix C. Supplemental Tables

TABLE 4. ALL OTHER BRANDS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Total TV ad spending (000)	TV ad exposure: All youth				TV ad exposure: Black youth			
					Ads viewed (All 2-11)	Ads viewed (All 12-17)	Child:adult ratio	Teen:adult ratio	Ads viewed (2-11 yrs)	Ads viewed (12-17 yrs)	Black:White child ratio (2-11)	Black:White teen ratio (12-17)
PepsiCo	Lipton Iced Tea	Other sugary drink		\$8,399	3.6	7.0	0.39	0.74	6.7	11.6	2.21	1.84
Tyson Foods	Hillshire Farm Sausage	Other		\$8,328	4.0	5.7	0.41	0.57	7.1	9.4	1.84	1.68
Campbell Soup Co.	Campbell's Skillet Sauces	Food prep/condiments		\$8,202	2.3	3.2	0.38	0.51	3.7	4.6	1.61	1.52
Hershey	Jolly Rancher Crunch N Chew	Candy		\$8,168	5.5	10.4	0.42	0.80	9.7	16.5	2.05	1.77
Tyson Foods	Ball Park Hot Dogs	Other		\$7,852	4.2	6.4	0.45	0.69	5.7	7.8	1.42	1.18
ConAgra Foods	Reddi-Whip Whipped Topping	Food prep/condiments		\$7,843	2.6	3.7	0.39	0.55	3.8	4.7	1.53	1.36
Unilever	Bertolli Classic Entrees	Prepared meals		\$7,806	1.8	2.6	0.39	0.56	2.6	3.2	1.50	1.23
Kellogg	Morningstar Farms Grillers	Prepared meals		\$7,801	3.1	5.0	0.38	0.61	4.5	7.2	1.43	1.51
General Mills	Cocoa Puffs	Cereal	✓	\$7,584	56.7	25.5	5.91	2.66	79.2	41.7	1.46	1.84
Nestle	DiGiorno Pizzeria	Prepared meals		\$7,457	2.8	4.7	0.34	0.57	4.9	7.5	1.91	1.70
Nestle	Skinny Cow Candy	Candy		\$7,388	3.0	4.9	0.32	0.52	5.6	8.3	1.91	1.70
PepsiCo	Muller Frutup	Yogurt/other dairy		\$7,220	2.1	3.4	0.43	0.69	2.8	4.4	1.57	1.52
Kellogg	Crunchy Nut	Cereal		\$7,064	2.9	4.5	0.35	0.55	4.8	6.6	1.78	1.54
Kraft Foods	Gevalia Coffee Beans	Other		\$7,045	1.9	3.0	0.35	0.56	2.9	4.2	1.64	1.51
PepsiCo	Tropicana Pure Premium	Juice/water		\$6,966	0.4	0.7	0.34	0.52	0.2	0.3	1.30	1.06
General Mills	Trix	Cereal	✓	\$6,767	54.3	24.1	5.90	2.62	75.7	39.2	1.45	1.83
Kellogg	Keebler Fudge Stripes Cookies	Sweet snacks		\$6,612	1.7	2.5	0.39	0.59	2.6	3.5	1.60	1.42
Kellogg	Special K Snack Bar	Sweet snacks		\$6,580	3.0	4.4	0.42	0.62	4.9	6.9	1.69	1.66
ConAgra Foods	Hunt's Manwich	Food prep/condiments		\$6,527	5.3	7.5	0.45	0.64	8.0	10.8	1.58	1.50

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Appendix C. Supplemental Tables

TABLE 4. ALL OTHER BRANDS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Total TV ad spending (000)	TV ad exposure: All youth				TV ad exposure: Black youth			
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Campbell Soup Co.	Swanson Food Products	Other		\$6,454	0.9	1.1	0.35	0.43	1.2	1.2	1.37	1.05
Kellogg	Pringles Stix	Savory snacks		\$6,435	2.5	3.9	0.41	0.63	4.2	6.2	1.88	1.73
Campbell Soup Co.	Pepperidge Farm Milano Cookies	Sweet snacks		\$6,326	1.5	2.5	0.36	0.61	2.4	3.3	1.66	1.48
Unilever	Ragu Pasta Sauce	Food prep/condiments		\$6,200	1.8	2.9	0.37	0.59	3.1	4.3	1.96	1.58
Kellogg	Kashi GoLean Crisp!	Cereal		\$6,082	1.2	1.6	0.36	0.49	1.8	2.3	1.52	1.37
Kraft Foods	Gevalia Ground Coffee	Other		\$6,052	2.2	3.6	0.32	0.53	3.5	5.1	1.68	1.52
Nestle	Lean Cuisine Spa Collection	Prepared meals		\$5,988	1.6	2.4	0.31	0.45	2.4	3.0	1.48	1.25
Kraft Foods	Kraft Foods Recipe Makers	Prepared meals		\$5,977	0.7	1.1	0.32	0.47	0.9	1.0	1.27	0.93
Kraft Foods	Capri Sun Roarin' Water	Other sugary drink	✓	\$5,890	26.9	14.3	5.45	2.89	35.7	23.7	1.48	2.08
Kraft Foods	Cool Whip	Food prep/condiments		\$5,678	1.4	2.4	0.40	0.67	2.0	2.7	1.32	1.13
Campbell Soup Co.	Campbell's Soup, Ready-to-serve	Prepared meals		\$5,643	1.2	1.7	0.35	0.50	1.7	1.9	1.40	1.18
Hershey	Cadbury Eggs	Candy		\$5,624	3.3	5.7	0.41	0.70	5.9	9.3	2.09	1.81
General Mills	Old El Paso Taco Shells	Food prep/condiments		\$5,565	3.5	5.1	0.48	0.69	5.0	6.1	1.62	1.32
Unilever	Breyer's Ice Cream	Sweet snacks	✓	\$5,493	4.4	2.2	2.41	1.20	5.8	2.2	1.60	1.38
Nestle	Lean Cuisine Honestly Good	Prepared meals		\$5,492	1.3	2.2	0.33	0.56	2.2	2.9	1.81	1.31
ConAgra Foods	Hebrew National	Other		\$5,489	1.8	3.0	0.37	0.63	2.9	4.1	1.62	1.45
Kellogg	Kellogg's Cereal	Cereal	✓	\$5,405	9.9	6.4	1.89	1.22	12.7	9.1	1.37	1.62
ConAgra Foods	Slim Jim	Other		\$5,157	1.7	3.7	0.36	0.77	3.1	6.0	1.96	1.74
General Mills	Gushers Fruit Snacks	Sweet snacks	✓	\$4,998	40.9	18.2	5.91	2.63	58.5	30.2	1.49	1.85

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Appendix C. Supplemental Tables

TABLE 4. ALL OTHER BRANDS\* (CONTINUED)

Company	Brand	Category	Child/teen targeted	Total TV ad spending (000)	TV ad exposure: All youth				TV ad exposure: Black youth			
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Kellogg	Kashi Hummus Crisps	Savory snacks		\$4,884	1.3	1.8	0.38	0.53	2.3	2.8	1.86	1.55
Nestle	Nestle Crunch	Candy		\$4,807	2.2	4.1	0.38	0.70	3.5	5.6	1.64	1.41
Kraft Foods	Maxwell House Cafe Collection Ground Coffee	Other		\$4,597	2.2	3.2	0.37	0.54	3.4	4.8	1.64	1.53
Nestle	Toll House Morsels	Food prep/condiments		\$4,564	1.2	1.6	0.37	0.48	2.1	2.5	1.89	1.66
Kraft Foods	Homestyle Macaroni and Cheese	Prepared meals		\$4,546	1.2	2.0	0.38	0.65	1.5	2.3	1.16	1.13
General Mills	Nature Valley Soft Baked Oatmeal Bar	Sweet snacks		\$4,521	2.1	2.5	0.48	0.56	3.0	3.4	1.68	1.58
ConAgra Foods	Bertolli Rustico Bakes	Prepared meals		\$4,483	1.1	1.6	0.42	0.62	1.7	2.1	1.63	1.26
Nestle	Butterfinger	Candy	✓	\$4,390	2.9	10.6	0.38	1.41	6.6	19.3	2.63	1.95
Coca-Cola Co.	Coca-Cola soft drinks	Regular soda		\$4,105	0.4	0.4	0.50	0.58	0.9	1.1	2.78	3.04
Mars	Uncle Ben's Ready Rice	Prepared meals		\$3,059	5.9	5.7	0.68	0.66	8.4	8.1	1.41	1.43
General Mills	Betty Crocker Cookie Mix	Food prep/condiments		\$2,913	2.5	2.8	0.56	0.63	4.3	4.7	1.69	1.65
PepsiCo	Quaker Real Medleys Snack Bar	Sweet snacks		\$2,835	2.4	2.3	0.65	0.61	3.3	3.5	1.36	1.52
PepsiCo	Gatorade G-Series	Other sugary drink		\$1,930	0.2	0.3	0.36	0.57	0.1	0.3	0.90	1.30
Coca-Cola Co.	Coca-Cola drink products	Regular soda		\$1,262	0.3	0.6	0.22	0.51	0.4	0.6	1.76	0.97
Kellogg	Froot Loops	Cereal	✓	\$1,250	39.6	19.8	5.69	2.84	53.1	32.4	1.42	1.89
Kellogg	Keebler Town House Crackers	Savory snacks		\$989	0.3	0.4	0.40	0.62	0.3	0.4	1.18	1.13
ConAgra Foods	Hunt's Vegetables	Fruits and vegetables		\$245	2.5	3.3	0.43	0.58	4.0	4.6	1.74	1.48
<b>Total</b>				<b>\$1,521,914</b>	<b>937.6</b>	<b>944.8</b>			<b>1,342.5</b>	<b>1,351.2</b>		
<b>Brand average</b>				<b>\$11,798</b>	<b>7.3</b>	<b>7.3</b>	<b>0.74</b>	<b>0.74</b>	<b>10.4</b>	<b>10.5</b>	<b>1.62</b>	<b>1.49</b>

\*Brands with >\$4.5 million in total advertising spending not identified as targeted to Black or Hispanic consumers