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Food Advertising to Children and Teens Score



Food industry self-regulation after 10 years

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Food industry self-regulation after 10 years: Progress and opportunities to improve food advertising to children

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Unhealthy food marketing to children remains a major public health concern. In response to calls for food companies to reform their child-directed marketing practices and promote products that support healthy eating,¹ the Council of Better Business Bureaus launched the Children's Food and Beverage Advertising Initiative (CFBAI) in 2007 to "shift the mix of foods advertised to children under 12 to encourage healthier dietary choices."² Since 2007, researchers have documented improvements in food advertising to children, but also limitations of industry self-regulation and a continued unhealthy food marketing environment surrounding children.

Positive developments in food advertising to children since 2007 include recent declines in total food-related TV advertising viewed by children;³ modest improvements in the overall nutritional quality of food and beverages advertised to children;⁴ substantial percentage increases in advertising of fruit and vegetables to children;⁵ and the discontinuation of large, popular food company sponsored advergame (i.e., branded games) websites.^{6,7} Yet in 2016, children continued to view, on average, more than 11 food-related ads on TV every day, primarily promoting unhealthy products, including fast food and other restaurants, candy, sweet and salty snacks, and sugary drinks.⁸ Less than 10% of food ads promoted products in healthier categories, including yogurt, other dairy, bottled water, or fruit and vegetables.

Evaluations of industry self-regulation conducted by public health experts—including the White House Task Force on Childhood Obesity in 2010,⁹ the Institute of Medicine (IOM) in 2012,¹⁰ and an expert panel convened by Healthy Eating Research (HER) in 2015¹¹—have recommended a number of improvements in industry self-regulatory efforts to achieve the goal of a food marketing environment that supports children's health. These recommendations can be categorized into four main areas: 1) Strengthen nutrition standards to identify healthier dietary choices and support a healthy diet for children;

2) Expand industry self-regulation to cover children older than 11 years old; 3) Expand the types of marketing covered by industry self-regulation, as well as the definitions of "child-directed" advertising; and 4) Expand voluntary programs to incorporate all food, beverage, and restaurant companies that market to children, as well as media companies that accept food-related advertising.

In this report, we assess industry self-regulation on its stated goal to promote healthier choices in child-directed advertising, as well as the impact of industry voluntary improvements on children's total exposure to food advertising. We conducted analyses to assess food advertising to children in 2016, measure improvements and other changes since the CFBAI was implemented in 2007, and quantify progress and the impact of limitations in industry voluntary pledges. Our objectives for this report are to recognize the CFBAI and food companies participating in industry self-regulation for measurable improvements in food advertising directed to children, but also to highlight limitations of industry voluntary pledges to improve marketing of unhealthy food and beverages.

Scope and methods

This report measures the extent of food, beverage, and restaurant advertising and children's exposure to this advertising using syndicated market research data. We examine advertising by CFBAI companies and brands, Children's Confection Advertising Initiative (CCAI) companies (another industry voluntary initiative for candy manufacturers¹²), and non-participating companies that do not belong to either self-regulatory initiative. We provide detailed analyses of advertising by 56 companies.

Exposure analyses quantify advertising viewed by children in child-directed media, as well as advertising they viewed on TV and in digital media not specifically targeted to children. When data were available, we compare 2016 results to 2007 and two intermediary years (2010 and 2013), and examine three child age groups: preschoolers (ages 2-5), children (ages 6-11), and young teens (ages 12-14). Specific analyses include:

- Advertising spending in all media, including TV advertising, in 2007, 2010, 2013 and 2016 (Nielsen data);

Food-related companies included in the advertising analyses

CFBAI companies with child-directed advertising (<i>n</i> =11)	These companies have pledged to advertise only products that meet CFBAI category-specific uniform nutrition criteria in child-directed media.
CFBAI companies that did not engage in child-directed advertising (<i>n</i> =7)	These companies have pledged that they will not advertise any of their products in child-directed media.
CCAI companies (<i>n</i> =8)	These candy manufacturers have pledged that they will not advertise any of their products in child-directed media.
Non-participating companies with top-50 brands (<i>n</i> =24).	These companies do not belong to industry self-regulatory initiatives, but they had brands that ranked among the 50 brands with the most TV advertising viewed by children in 2016.
Non-participating companies with healthy brands advertised to children (<i>n</i> =6).	These companies do not belong to industry self-regulatory initiatives, but they advertised products in the healthiest categories (fruit, vegetables, dairy, plain water, and nuts) to children in 2016.

- TV advertising exposure by different age groups, including ads on children's TV and other types of programming, in 2007, 2010, 2013, and 2016 (Nielsen data);
- Child and teen visits to food, beverage, and restaurant company websites in 2016 (comScore data);
- Banner advertising placed on third-party websites in 2016, including kids' websites and social media sites (comScore data); and
- Popularity of and activity on food company-sponsored social media pages (Facebook, Twitter, Instagram, and YouTube) in 2016 (Unmetric data).

In addition, we assess the nutritional quality of products that CFBAI companies included on their lists of products that may be in child-directed advertising, as well as additional products offered by these same brands, as of May 2017. We use three standards to evaluate nutritional quality: CFBAI category-specific uniform nutrition criteria used by CFBAI companies to identify healthier dietary choices that could be featured in child-directed advertising,¹³ Smart Snacks nutrition standards for products that can be sold to children in schools,¹⁴ and NPI scores of overall nutrition content used to identify products that can be advertised to children in the United Kingdom.¹⁵

Key findings

Despite a 7% increase in total advertising spending by food, beverage, and restaurant companies from 2007 to 2016, children viewed fewer food-related TV ads in 2016 than in 2007, the year the CFBAI was implemented.

- In 2016, more than 20,300 food, beverage, and restaurant companies spent approximately \$13.5 billion in advertising in all media.
- The 56 companies in our analysis were responsible for 71% of all food-related advertising spending and approximately 85% of TV food advertising viewed by children in all age groups in 2016.

- The number of food-related TV ads viewed by children in all age groups declined from 2007 to 2016 – by 4% for preschoolers (ages 2-5), 11% for children (ages 6-11), and 14% for young teens (ages 12-14).
- However, exposure to food-related TV advertising by children (ages 2-14) continued to average 10 to 11 ads per day in 2016, or approximately 4,000 ads for the year.ⁱ

Various trends have affected children's total exposure to food-related TV advertising, in both positive and negative directions.

- The number of food-related ads viewed on children's TV programming declined steadily from 2007 to 2016, by approximately 45% for preschoolers, children, and young teens.
- Furthermore, children in all age groups spent less time watching TV in 2016 than in 2013, including reductions of 15% for preschoolers, 20% for children, and 30% for young teens, which also contributed to declines in the number of food ads viewed.
- By contrast, the number of food-related ads shown per hour of TV viewing increased for all age groups except preschoolers during this time, due to an increase in ads on other (not children's) TV programming. In 2016, children and young teens, respectively, viewed 4.1 and 4.9 food-related ads per hour of TV watched.
- Children and preschoolers (but not young teens) viewed substantially more food-related ads on non-children's TV programming in 2016 than in 2007, increasing by 42% for preschoolers and 26% for children.

Advertising by CFBAI companies

As of 2016, 18 companies participated in the CFBAI, including seven companies that pledged to not direct any advertising to children under age 12, and 11 companies with some child-directed advertising. CFBAI companies with child-directed advertising included 47 different brands on their lists of

Definitions of CFBAI company pledge terms

CFBAI listed brands	Brands from CFBAI companies with products that participants indicated “meet the CFBAI category-specific uniform nutrition criteria that may be in child-directed advertising” (CFBAI product list, July 2016). ¹⁶ Of note, not all products that met CFBAI nutrition criteria were included on this list.
CFBAI listed products	Individual products included on the CFBAI product list.
Non-listed products	Individual products from CFBAI listed brands that were not included on the CFBAI product list.
CFBAI non-listed brands	Brands from CFBAI companies that did not have any products on the CFBAI product list. All products offered by these brands were “non-listed.”

For example: General Mills is a CFBAI participating company that has child-directed advertising. Cheerios is one of the company's CFBAI listed brands. General Mills listed three Cheerios products (original Cheerios, Honey Nut Cheerios, and Banana Nut Cheerios) that met CFBAI nutrition criteria and might be in child-directed advertising (i.e., CFBAI listed products). Cheerios also offered 10 products (e.g., Frosted Cheerios, Fruity Cheerios) that were not included on the CFBAI product list (i.e., non-listed products).

i. These numbers exclude spot-TV advertising as Nielsen does not provide all relevant age breaks for spot-TV GRPs.

products that may be featured in child-directed advertising as of July 2016 (i.e., CFBAI listed brands).

CFBAI companies spent \$6 billion and contributed 44% of total food-related **advertising spending** on all types of traditional media in 2016.

- A relatively small amount (\$735 million, 12% of this total) was spent on advertising for brands with products that may be featured in child-directed advertising (i.e., CFBAI listed brands).
- From 2007 to 2016, companies with child-directed advertising reduced their total advertising spending by 14%, including a 4% reduction for CFBAI listed brands. On the other hand, total advertising spending by the seven CFBAI companies that pledged to not engage in any child-directed advertising increased by 15%.

CFBAI companies also placed more than one-half of all food-related **TV advertisements viewed by children** on all types of TV programming, averaging 5.4 ads viewed per day by preschoolers and 6.1 ads viewed by children in 2016. However, CFBAI companies reduced total advertising viewed by children following CFBAI implementation in 2007.

- On children's TV programming, CFBAI companies placed more than 60% of ads viewed by preschoolers and approximately 70% of ads viewed by children and young teens.
- From 2007 to 2016, the number of CFBAI company ads viewed on children's TV declined by approximately 50% for all age groups examined in this report.
- Children's exposure to CFBAI company ads on other types of TV programming also declined during this time, but at lower rates (by 4% for preschoolers, 18% for children, and 31% for young teens).

Despite compliance with their pledges, children continued to view on average 3.1 ads per day in 2016 for CFBAI non-listed brands that companies indicated could not be featured in child-directed advertising.

- Less than one-half of TV ads for all CFBAI company brands viewed by preschoolers (44%) and children (48%) were for listed brands that companies indicated may be featured in child-directed advertising.
- It is important to note that ads for brands that were not included on CFBAI product lists did not appear on children's TV programming, so companies did comply with their pledges to not advertise these products in child-directed media. Nonetheless, they represented more than one-half of TV ads viewed by preschoolers and children from CFBAI companies.
- Furthermore, some CFBAI companies that pledged to not engage in any child-directed advertising increased the

number of total TV ads viewed by children (on all types of programming) from 2007 to 2016, including an increase of 51% for Coca-Cola and a more than five-fold increase for Hershey.

On the internet, CFBAI pledges cover advertising on third-party websites where children comprise 35% or more of visitors. However, third-party websites consisting of primarily child-directed content (i.e., kids' websites, identified by comScore), did not always meet the CFBAI definition of child-directed advertising.

- CFBAI companies placed 93% of all food-related banner advertising viewed on third-party kids' websites in 2016, totaling 473 million ad impressions (i.e., the number of times ads were viewed by all visitors combined).
- The majority of banner ads placed by CFBAI companies on kids' websites appeared on ten sites, including Roblox.com, PopTropica.com, and ABCYA.com. Children (ages 2-12)ⁱⁱ were approximately two to three times more likely to visit kids' websites than were adults. However, just five of the 10 would qualify as child-directed according to the CFBAI definition (i.e., ≥35% child audience).
- Seventy percent of CFBAI company banner ads placed on kids' websites promoted CFBAI listed brands. The remaining ads did not promote products that CFBAI companies had listed as products that may be in child-directed advertising. However, due to the more limited CFBAI definition of child-directed websites, these ads likely did not violate companies' pledges.

CFBAI companies also maintained 152 websites with enough child visitors to measure in comScore, although the majority of these sites attracted fewer than 1,000 children (ages 2-12) per month.ⁱⁱ

- Children were approximately twice as likely to visit websites for CFBAI listed brands that may be in child-directed advertising compared with older visitors, but just four of the 17 websites for CFBAI listed brands would qualify as child-directed, according to the CFBAI definition (i.e., ≥35% child audience).
- The remaining 135 CFBAI company websites promoted non-listed brands that CFBAI companies had not included on lists of products that may be in child-directed advertising. None of these sites met the CFBAI definition of child-directed, but 30% of visitors to one Coca-Cola site (Coca-ColaStore.com) were children (ages 2-12).
- McDonalds.com (a site promoting all McDonald's products) attracted more child visitors than any other CFBAI company website in 2016 (86,000 per month), followed by two websites for CFBAI listed brands: HappyMeal.com (62,000) and Lunchables (44,000).

ii. comScore defines children as ages 2 to 12. It does not provide data on the age group defined by the CFBAI as children (i.e., ages 2-11).

- Since 2009, many CFBAI company websites that were popular with children have been discontinued, including four sites that averaged more than 60,000 child visitors monthly (Millsberry.com, McWorld.com, AppledJacks.com, and Postopia.com). The numbers of children visiting the remaining websites declined dramatically from 2009 to 2016, by 80% or more for the majority of the most popular websites in 2009.

Social media marketing is not exclusively directed to children, and CFBAI company pledges do not cover this form of marketing. However, previous research has shown that companies have increased their spending on social media marketing directed to youth,¹⁷ and some social media platforms (including Instagram and YouTube) have wide appeal for youth (including children under 13).^{18,19}

- Nearly all CFBAI companies and approximately one-half of CFBAI listed brands maintained social media accounts on two or more social platforms (Facebook, Twitter, Instagram, and/or YouTube), with many attracting millions of fans, followers, or views and posting frequently.
- Some CFBAI listed brands with little or no traditional advertising were among the most popular on social media, including Eggo, Quaker, and Popsicle. Bolthouse Farms had the most active social media accounts across all platforms, but did not advertise in any traditional media in 2016.

Nutritional quality of CFBAI company listed brands

CFBAI category-specific uniform nutrition criteria to determine which products would qualify for child-directed advertising were implemented in 2013.²⁰ The standards set different criteria for 10 different categories of food and drink products, but all criteria were consistent across all participating companies. These criteria specify limits on calories, saturated fat, sodium, and total sugar, and also require products to include a specified amount of nutrient components to encourage, including fruit, vegetables, dairy, and/or whole grain, or fortification. The CFBAI regularly publishes lists of products that meet these criteria and that participating companies have indicated might be advertised in child-directed media.

- As of January 2017, the eleven CFBAI companies with child-directed advertising listed 319 products from 47 brands that met CFBAI category-specific uniform nutrition criteria and might be in child-directed advertising.
- One-third of listed products were yogurts, while meals and entrees, fruit-flavored drinks, sweet and savory snacks, and breakfast cereals comprised another 50%. There was only one vegetable and no fruit on the list (excluding side items in fast food kids' meals).

The majority of products included on CFBAI lists of products that may be in child-directed advertising did not meet Smart

Snacks and/or NPI standards due to excessive sugar, fat, and/or sodium content, and most did not contain fruit, vegetables, or whole grains. In addition, the strength of CFBAI uniform criteria varied widely by category.

- All CFBAI listed yogurts had healthy NPI scores and 89% met Smart Snacks standards for nutrients to limit.
- Listed meals and entrees all had healthy NPI scores for overall nutrition content, but 19% did not meet Smart Snack standards due to calories, saturated fat, and/or sodium that exceeded per serving limits.
- Most breakfast cereals (84%) did not have healthy NPI scores, but approximately 60% met Smart Snacks limits for the serving size listed on nutrition facts panels.
- More than 80% of products in other CFBAI categories (other grains and items not in other categories; cheese; and nut butters) did not meet either NPI or Smart Snacks standards, including Betty Crocker Fruit Snacks, Goldfish crackers, and Popsicles.

More than one-half (55%) of the products ($n=386$) offered by brands with child-directed advertising *were not* included on their lists of products that may be featured in child-directed advertising (i.e., non-listed products). Therefore, CFBAI pledges allow companies to advertise brands directly to children even when the majority of products offered by that brand do not meet CFBAI nutrition standards, providing that the ads show only listed products (e.g., at the end of the ad) or a brand logo without any products.

- Non-listed products were less likely than listed products to meet all three nutrition standards, including CFBAI nutrition criteria. For example, 32% of non-listed yogurt products, 55% of cereals, and 99% of meals and entrees did not meet CFBAI nutrition criteria, compared with 6% or less of listed products from the same brands.
- Categories with more non-listed than listed products included meals and entrees; other grains, vegetables and items not in other categories (including breakfast cereals); and beverages.

CFBAI company advertising to young teens (ages 12-14)

CFBAI company improvements in advertising to children under age 12 have had limited benefit for young teens (ages 12-14), who primarily view advertising in media that does not meet CFBAI definitions for child-directed. Some CFBAI companies appeared to directly targeting young teens with ads for candy, sugary drinks, snack foods, and fast food.

- In 2016, young teens viewed 39% fewer ads for CFBAI listed brands than did children (ages 6-11) covered by CFBAI pledges, but 30% more ads for non-listed brands.
- CFBAI brands that appeared to target young teens directly as evidenced by the greatest disparities between ads

viewed by young teens versus children included one candy brand (M&Ms), three sugary drinks (Gatorade, Mountain Dew, and Pepsi), and two snack foods (Doritos and Cheetos).

- Young teens saw 45% to 68% more TV ads than children saw for candy, sugary drink, and snack food brands from CFBAI companies, as well as 32% more ads for fast food products (i.e., not kids' meals) from CFBAI companies that were not approved for advertising to children.

Advertising by CCAI companies

In 2016, the Council of Better Business Bureaus (CBBB) in partnership with the National Confectioners Association, launched the CCAI.²¹ Eight candy companies pledged that they will not advertise directly to children under 12. CCAI companies have kept their pledges not to advertise in media directed to children under 12, although five of the eight CCAI companies also had little or no advertising in any media prior to 2016, before their pledges were implemented.

- Combined, CCAI companies combined spent \$18 million on all types of advertising in 2016 (approximately 0.1% of all food-related advertising spending), a decline of 47% from 2013, when they spent \$34 million.
- In 2016, only Ghirardelli Chocolate and Jelly Belly advertised on TV (but they did not advertise on children's TV). Preschoolers and children viewed, on average, just 5.0 and 4.3 total TV ads, respectively, for these companies in 2016.
- From 2013 to 2016, Ghirardelli Chocolate decreased TV advertisements viewed by children by almost one-half, while Just Born discontinued its TV advertising altogether.
- On the other hand, Jelly Belly more than doubled its total advertising spending during this time, and the number of TV ads viewed by children increased eight-fold (although the numbers are small).

Advertising by non-participating companies

The voluntary nature of industry self-regulation may present its most consequential limitation. Since 2007, a small number of non-participating companies have significantly increased their advertising – both in children's TV and other types of media viewed by large numbers of children – which has largely offset reduced advertising by CFBAI participants.

- The 24 non-participating companies with top-50 brands examined in this report spent \$3.4 billion in total advertising in 2016, one quarter of advertising spending by all food, beverage, and restaurant companies.

- These companies also were responsible for approximately 30% of TV ads viewed by preschoolers, children, and young teens in 2016, averaging 2 to 3 ads viewed per day by children in these age groups.
- Preschoolers' total exposure to advertising by these non-participating companies increased by 66% from 2007 to 2016, and children's exposure increased 46%, while exposure by teens increased at a much lower rate of 17%.

Seven non-participating companies targeted advertising for one or more brands directly to children under 12 in 2016,ⁱⁱⁱ including two fast food restaurants (Subway and Sonic kids' meals), two casual restaurants (Chuck E. Cheese's and Dave & Buster's), two candy companies (Topps and Perfetti Van Melle), and The Bel Group (Laughing Cow and BabyBel cheeses).

- From 2007 to 2016, these companies increased their total advertising spending by 45%.
- More than 80% of TV ads for these companies viewed by preschoolers and children were shown on children's programming, and from 2007 to 2016 they increased the number of ads viewed by preschoolers and children on children's TV by 36% and 27%, respectively.
- Chuck E. Cheese's and Topps child-targeted candy brands were responsible for almost three-quarters of advertising to children by non-participating companies on children's TV in 2016, totaling 212 TV ads viewed by preschoolers and 201 ads viewed by children.

The 12 non-participating fast food restaurants in this category spent \$2.7 billion on advertising (excluding kids' meals advertising) in 2016, an increase of \$640 million (22%) compared with 2007.

- Preschoolers and children saw 600 and 644 TV ads, respectively, from these restaurants in 2016, increases of 95% and 61% compared to 2007.
- Although young teens saw approximately one-third more ads for these restaurants (835) in 2016 than did younger children, their exposure increased at a much lower rate (+17%) from 2007 to 2016.
- Some fast food restaurants advertised products that were not kids' meals on children's TV programming, including Sonic, Subway, Wendy's, and Papa John's. However, 97% of non-participating fast food restaurant ads viewed by preschoolers and children appeared on other types of programming.

Despite a 5% decline in advertising spending by seven additional non-participating casual restaurants from 2007 to 2016, TV advertising viewed by preschoolers and children for these restaurants increased by 59% and 46%, respectively, during this time.

iii. These companies advertised at least one brand on children's TV and children viewed relatively more ads for the brand compared with adults.

- In total, children and preschoolers viewed, on average, 195 and 185 TV ads, respectively, in 2016, led by Applebee's and Olive Garden.
- However, Denny's was the only restaurant in this category to advertise on children's TV.

The non-participating companies examined placed fewer banner ads on third-party kids' websites compared with CFBAI companies, but most maintained their own websites, and many of these sites ranked among the most popular food company sites with children.

- Chuck E. Cheese's and five fast food and other casual restaurants placed more than 1 million banner ads each on kids' websites in 2016.
- Chuck E. Cheese's had the most child visitors to its website in 2016 (averaging 139,000 per month) compared with sites for all other non-participating companies.
- In addition, two fast food websites (PizzaHut.com and Dominos.com) averaged more than 100,000 child visitors per month.
- All 19 fast food and other casual restaurants examined maintained social media accounts in all four platforms examined. As a group, non-participating companies tended to have the most popular accounts on Facebook, Twitter, and Instagram.
- Fast food restaurants had the most popular Facebook and Twitter accounts of any type of company in our analysis, including a median 6.8 million Facebook fans per account.

Advertising to children under age 6

These analyses also identify several significant concerns about food advertising viewed by children under age 6. Child development experts, including the American Psychological Association (APA), recommend that preschool-age children should not be exposed to any form of advertising due to young children's inability to distinguish between program and commercial content.²² In recognition of this concern, all CFBAI companies with child-directed advertising, except McDonald's, have pledged that they will not advertise any of their products in media primarily directed to children under age 6.

CFBAI companies appear to have complied with these pledges. However, their pledges only apply to a small number of preschool TV networks that accept commercial advertising (primarily Nickjr. and Sprout). Furthermore, these pledges do not appear to have resulted in any improvements in advertising viewed by preschoolers (ages 2-5) relative to children (ages 6-11) since the CFBAI was implemented.

- In 2016, preschoolers viewed on average 1,985 ads from CFBAI companies, which was just 11% fewer ads than children viewed. In 2007, preschoolers had viewed 13% fewer ads than children viewed.

- Furthermore, differences in ads viewed by preschoolers relative to children varied widely by CFBAI company, especially for advertising in other (not children's) TV programming. In 2016 on other TV programming, preschoolers saw more ads for Mondelez, McDonald's, and Campbell Soup brands compared with children, the same number of ads for Hershey and Ferrero brands, and just 1% to 2% fewer ads for Nestle and ConAgra brands.

In addition, as noted earlier, from 2007 to 2016, the number of TV ads viewed by preschoolers for non-participating companies increased by two-thirds, including a 35% increase by these companies advertising on children's TV programming.

- Chuck E. Cheese's had the most TV advertising to preschoolers under age 6 of any single brand in our analysis, averaging 147 ads viewed in 2016, 88% of them appeared on children's TV programming. In addition, preschoolers saw 35% more ads for Chuck E. Cheese's than children (ages 6-11) saw.
- Chuck E. Cheese's, Bel Brands, and four additional non-participating companies in our analysis advertised on preschool TV networks (Nickjr. and Sprout) in 2016, totaling 60 ads viewed per preschooler and approximately three times as many ads viewed on these networks than in 2013. Of note, there was no TV advertising on preschool TV programming in 2007.

Advertising by companies with healthy brands

The only evidence of increased advertising to children for healthy products that they should be encouraged to consume (e.g., fruit and vegetables, nuts, plain water, or milk) was by a small number of companies that did not participate in the CFBAI.

- These six companies – Wonderful Company, MilkPEP, Dole Food, Chobani, Birds Eye, and WhiteWave Foods Co. (Silk almond milk) – spent just \$291 million in total advertising in 2016, which represented less than 1% of all food-related advertising spending.
- They represented 3% or less of all TV food advertisements viewed by children, averaging approximately 110 ads viewed by preschoolers and children for these companies combined in 2016.
- However, children's exposure to TV advertising for healthy brands increased five-fold or more from 2007 to 2016, and most of these companies' healthy brands placed some advertising on children's TV.
- In contrast to relatively little advertising in traditional media, most of these companies maintained popular and active social media accounts, averaging 3.9 platforms per account.

Conclusions

These analyses confirm that CFBAI participating companies have largely complied with their pledges to only advertise products that meet CFBAI category-specific uniform nutrition criteria and are included on their lists of products that may be advertised in child-directed media.^{iv} In total, CFBAI companies also reduced the number of food-related advertisements viewed by children for their brands, especially in child-directed media. In addition, candy companies in the CCAI complied with their pledges to not direct any advertising to children under 12.

However, these analyses also highlight the continued need for improvements in areas identified by public health experts as substantial limitations of industry self-regulatory programs: 1) Strengthen nutrition standards; 2) Expand the ages of children covered; 3) Expand the definition of “child-directed” advertising and the types of marketing covered; and 4) Expand participation in voluntary programs.

A strength of the analyses in this report is that they utilize publicly available syndicated market research data, including the same data that companies use. However, these data have some limitations. Research companies’ definitions of child-directed media do not directly conform with CFBAI definitions. In addition, demographic data were not available to measure exposure by age to banner ads on third-party websites or social media fans or followers. Therefore, some analyses report exposure by individuals in all age groups. However, this information is important for understanding the entire food marketing landscape surrounding children.

These analyses also indicate the need for additional research in several areas to quantify opportunities for further improvements in industry self-regulation:

- Examine preschoolers’ exposure to food advertising in more detail, including the commercial TV programming they regularly view, to identify potential actions to reduce their exposure.
- Analyze the types of programming where companies placed TV advertising viewed by disproportionately high numbers of young teens to identify programming where companies should focus efforts to reduce unhealthy food advertising.
- Examine the messages used in advertising viewed widely by children for brands that were not child-directed to examine the extent to which they utilized messages that appeal to children and their impact on children’s attitudes.
- Measure children’s access to and engagement with food-related marketing on social media.

Recommendations

Numerous opportunities remain for all key actors to take action to improve the food marketing environment surrounding children.

CFBAI companies should address limitations of their pledges that allow participating companies to continue to advertise nutritionally poor food and drinks to children:

- Revise CFBAI category-specific uniform nutrition criteria to align with recommendations in the 2015 Dietary Guidelines for Americans.²³ At a minimum, they should correspond with Smart Snacks nutrition standards.
- Only advertise brands in child-directed media when all products offered by the brand also meet nutrition standards for advertised products.
- Implement HER recommendations²⁴ to not market to children up to age 14 and revise definitions of child-directed advertising to incorporate all marketing that appeals to children, including marketing in social media.
- Establish standards that effectively reduce preschoolers’ exposure to food-related advertising, such as not advertising on children’s TV programming during school-time hours.

Non-participating food, beverage, and restaurant companies must reduce children’s exposure to their advertising for unhealthy products:

- Discontinue advertising for unhealthy products, including candy, restaurants, and fast food, during children’s TV programming and other child-directed media.
- Fast food and other casual restaurants should take actions to reduce children’s rapidly increasing exposure to their advertising in all media.
- The small number of companies that engage in the most unhealthy food advertising directed to children should join existing industry self-regulatory programs, such as the CFBAI or CCAI, or establish their own company policies.

Media companies should take action to improve advertising during children’s programming on their networks:

- Children’s TV networks and third-party websites should follow the lead of The Walt Disney Company²⁵ and set nutrition standards for all advertising placed by food, beverage, and restaurant companies.
- Preschool TV networks should not accept any advertising during preschool programming, due to young children’s inability to distinguish between program and commercial content.²⁶

iv. The only exception we found was banner advertising on kids’ websites placed by CFBAI non-listed brands. However, we do not have data to determine whether these ads appeared on third-party websites that did not meet the CFBAI definition of child-directed (i.e., 35% or more of visitors were children under age 12).

- Media companies should also provide incentives, such as lower advertising rates, for advertising that promotes nutritious products, such as fruit, vegetables, and whole grains, to children.

Child health advocates can help inform parents about the most harmful food marketing practices and mobile grassroots actions to demand improvements:

- Public health campaigns should raise awareness of the American Academy of Pediatrics (AAP) guidelines to limit preschoolers' screen time to one hour per day²⁷ and help parents identify high-quality non-commercial programming options.
- Grassroots campaigns can help raise awareness of current food marketing practices and encourage food and media companies to correct their most harmful practices.
- Advocates should continue to put pressure on current industry self-regulatory programs to implement recommendations for actions to reduce children's exposure to unhealthy food marketing.

Policymakers also have options to improve food marketing to children:

- Federal regulatory agencies – including the Federal Communications Commission (FCC) and the Federal Trade Commission (FTC) – should resist industry efforts to reduce

current protections regarding advertising to children in broadcast media and expand these protections, such as not allowing product placements or host selling (e.g., promoting a company website during children's programming), to newer forms of media, including digital media.

- Policymakers at the local and state level should enact new policies to address child-directed marketing in their communities, including in retail locations, restaurants, and schools.

The CFBAI and food companies participating in industry self-regulatory initiatives should be recognized for actions they have taken to reduce advertising to children, especially on children's TV and the internet. However, these actions have not resulted in a transformation of the unhealthy food marketing environment surrounding children that the IOM called for in 2006. Ten years later, food advertising to children remains far from the goal of supporting healthy eating for children. All key actors, including the public health community, food and media industries, and policymakers, must take meaningful action to ensure that food marketing does not continue to put children's health at risk.

Since the Children's Food and Beverage Advertising Initiative (CFBAI) food industry self-regulatory program was introduced in 2007, research has documented some improvements in food advertising to children. However, public health experts have also identified limitations of industry self-regulation and the need for further improvements. In this report, we assess food advertising to children in 2016 and quantify opportunities for continued improvement in industry self-regulation of food advertising to children.

Unhealthy food marketing to children remains a major public health concern. In 2006, the Institute of Medicine (IOM) published a comprehensive review of the relevant research and concluded that food and beverage marketing to children contributes to "an environment that puts their health at risk."¹ The IOM committee called on food and beverage companies to reassess their marketing practices and instead "develop and promote food, beverages, and meals that support healthful diets for children and youth." In response to this call to action, the Council of Better Business Bureaus (CBBB) launched the Children's Food and Beverage Advertising Initiative (CFBAI) industry self-regulatory program in 2006 with the goal to "shift the mix of foods advertised to children under 12 to encourage healthier dietary choices."² Initially, 11 participating companies pledged to advertise only healthy dietary choices in child-directed advertising, implementing their pledges by the end of 2007. As of January 2017, 18 of the largest food and beverage companies belonged to the Initiative. In 2016, the CBBB in partnership with the National Confectioners Association launched another self-regulatory initiative, the Children's Confection Advertising Initiative (CCAI), with eight participating candy companies pledging not to advertise directly to children under 12.³

Since the launch of the CFBAI, researchers have conducted independent evaluations of the impact of food industry self-regulation and found some positive developments. Food-related TV advertising viewed by children (2-11 years) has begun to decline. Following an 8% increase in children's total exposure to food, beverage, and restaurant (i.e., food-related) advertising from 2007 to 2013, the number of food-related TV ads viewed by children has consistently declined since 2013.^{4,5} In 2016, children viewed 7% fewer of these ads compared to 2007. In contrast to the overall trends, ads for healthier product categories have increased substantially. For example, TV ads for fruits and vegetables viewed by children under 12 have increased 151% since 2007, although the number of ads viewed remained low (approximately 1% of all food ads viewed in 2016). There has also been a modest improvement in the overall nutritional quality of advertised food and beverages; in 2009, 86% of food-related TV ads viewed by children (2-11 years) were high in sugar, saturated fat and/or sodium compared to 94% of ads viewed in 2003.⁶ In addition, the largest food company-sponsored websites aimed

at children have been discontinued, including Millsberry.com, Postopia.com, and McWorld.com. In 2009, on average 280,000 children visited Millsberry.com and spent more than sixty minutes on the site per month.⁷

Despite these improvements, the continued magnitude and poor nutritional quality of the majority of food and beverage advertising remain significant contributors to the unhealthy food environment that surrounds children. In 2016, children (2-11 years) viewed on average 11.3 food-related ads on TV every day, and teens (12-17 years) viewed 11.8 ads-per-day (including advertising on national and spot TV).⁸ Primarily unhealthy product categories, including fast food and other restaurants, cereal, candy, snacks, and carbonated and other sugary beverages, represented nearly three-quarters of TV ads viewed by children and teens (72% and 73%, respectively). In contrast, generally healthier food and beverage categories, including yogurt, other dairy, bottled water, and fruits and vegetables, represented just 9% of food-related ads viewed by both age groups. In 2009, food companies spent \$1.8 billion in marketing aimed at children and adolescents, including \$1 million in marketing to children under age 12, but just \$7 million (0.4% of the total) was spent marketing fruits and vegetables.⁹ A comprehensive report by the Federal Trade Commission (FTC) in 2012 highlighted improvements in the nutritional quality of products advertised to children through reformulation of existing products and replacement of products that are no longer advertised to children or not available on the market.¹⁰ However, reported improvements were minimal and unlikely to contribute to noticeable improvements in children's diets in the context of US Dietary Guidelines.¹¹

Recommendations for improvements in CFBAI voluntary pledges

Research conducted since 2007 has also identified numerous limitations in industry-led voluntary actions that further limit the potential effectiveness of industry self-regulatory initiatives. Citing these findings, a report by the White House Task Force on Childhood Obesity in 2010¹² and a follow-up report by the IOM in 2012¹³ expressed concerns about this lack of substantial progress in improving food marketing to children and recommended further improvements in industry self-regulatory efforts. In addition, an expert panel convened by Healthy Eating Research (HER), a national program of the Robert Wood Johnson Foundation, specified a comprehensive set of definitions to identify food marketing practices directed to children that should be covered by CFBAI pledges.¹⁴

Table 1 summarizes these expert recommendations for improving food marketing to young people in general, as well as specific recommendations for industry self-regulation. Recommendations regarding industry self-regulation focus primarily on four areas: 1) improving the nutrition standards used to identify healthier dietary choices; 2) expanding the ages of children covered by pledges; 3) expanding the types of marketing and definitions of child-directed advertising covered by pledges; and 4) expanding participation in voluntary programs.

Table 1. Recommendations for improvements in food marketing to children and industry self-regulatory pledges

	Recommended improvements			
	Improve nutrition standards	Expand child ages covered	Expand types/ definitions of marketing covered	Expand voluntary participation
White House Task Force (2010)¹⁵				
Recommendation 2.5: The food and beverage industry should extend its self-regulatory program to cover all forms of marketing to children, and food retailers should avoid in-store marketing that promotes unhealthy products to children.			✓	
Recommendation 2.6: All media and entertainment companies should limit the licensing of their popular characters to food and beverage products that are healthy and consistent with science-based standards.	✓		✓	✓
Recommendation 2.7: The food and beverage industry and the media and entertainment industry should jointly adopt meaningful, uniform nutrition standards for marketing food and beverages to children, as well as a uniform standard for what constitutes marketing to children.	✓		✓	✓
Recommendation 2.9: If voluntary efforts to limit the marketing of less healthy foods and beverages to children do not yield substantial results, the U.S. Federal Communications Commission (FCC) should consider revisiting and modernizing rules on commercial time during children's programming.				✓
Institute of Medicine (IOM) (2012)¹⁶				
Strategy 3-2: Implement common standards for marketing foods and beverages to children and adolescents.				
The food, beverage, restaurant, and media industries should take broad, common and urgent voluntary action to make substantial improvements in their marketing aimed directly at children aged 2-17.		✓		✓
All foods and beverages marketed to this age group should support a diet that accords with the Dietary Guidelines for Americans.	✓			
Children and adolescents should be encouraged to avoid calories from foods that they generally overconsume (e.g., products high in sugar, fat, and sodium) and to replace them with foods they generally underconsume (e.g., fruits, vegetables, and whole grains).	✓			
The standards set for foods and beverages marketed to children and adolescents should be widely publicized and easily available to parents and other consumers.	✓			
They should cover foods and beverages marketed to children and adolescents ages 2-17 and should apply to a broad range of marketing and advertising practices, including digital marketing and the use of licensed characters and toy premiums.		✓	✓	
If such marketing standards have not been adopted within 2 years by a substantial majority of food, beverage, restaurant, and media companies that market foods and beverages to children and adolescents, policy makers at the local, state, and federal levels should consider setting mandatory nutritional standards for marketing to this age group to ensure that such standards are implemented.				✓
Potential actions include:				
All food and beverage companies, including chain and quick-service restaurants, adopting and implementing voluntary nutrition standards for foods and beverages marketed to children and adolescents;				✓
The Children's Food and Beverage Advertising Initiative and National Restaurant Association Initiative, as major self-regulatory marketing efforts, adopting common marketing standards for all member companies, and actively recruiting additional members to increase the impact of improved food marketing to children and adolescents;			✓	✓
Media companies adopting nutrition standards for all foods they market to young people; and	✓			✓
The Federal Trade Commission regularly tracking the marketing standards adopted by food and beverage companies, restaurants, and media companies.				✓

Table 1. Recommendations for improvements in food marketing to children and industry self-regulatory pledges (continued)

Healthy Eating Research (HER) Recommendations for Responsible Food Marketing to children (2015) ¹⁷	Recommended improvements			
	Improve nutrition standards	Expand child ages covered	Expand types/ definitions of marketing covered	Expand voluntary participation
The child audience is defined as birth to 14 years of age.		✓		
Media and venues are considered child-directed if children constitute 25 percent or more of the audience or if an assessment of the marketing strategies, techniques, characteristics, and venue suggests that children are the target demographic for the advertising or marketing message.			✓	
Any marketing that is especially appealing to kids is child-directed.			✓	
Brands marketed to children contain only products that meet nutrition criteria.	✓			

Nutrition standards for healthier dietary choices

The initial criteria for participation in the CFBAI allowed companies to establish their own nutrition standards for food and beverages that could be advertised to children. Although companies were required to utilize science-based standards,¹⁸ different companies with products in the same categories used different definitions of “healthy.” This practice raised numerous concerns. For example, one study found that in 2009, 96% to 97% of ads viewed by children on child-directed TV programming were high in sugar, saturated fat, and/or sodium.¹⁹ Furthermore, the nutritional quality of products advertised on child-directed TV was worse than products advertised on other TV programming not covered by company pledges, and products advertised by CFBAI companies on children’s TV were worse than products advertised by non-participating companies. Another study found that in 2009 less than 1% of food ads appearing on children’s TV were for nutritious products that children should be encouraged to consume, such as fruit, vegetables and whole grains.²⁰

In 2011, the CFBAI addressed this critique by introducing new category-specific uniform nutrition criteria to be fully implemented by the end of 2013.²¹ These criteria included specific limits on calories, saturated fat, sodium, and total sugar for 10 different categories of food and drink products and were consistent across all participating companies. In addition to thresholds for nutrients to limit, the criteria also required that eligible products include a specified amount of nutrient components to encourage, including fruit, vegetables, dairy, and/or whole grain, or fortification. Although changes in the nutritional quality of products advertised to children since the new criteria were fully implemented have not been evaluated comprehensively, an evaluation of food ads appearing on one children’s TV channel (Nickelodeon) in 2015 found a small improvement: 65% of products featured in food ads in 2015 were unhealthy compared to 69% in 2010.²² However, the same study also found that the total number of ads for unhealthy products increased during this time. Furthermore, the list of products approved for advertising

to children by CFBAI companies as of July 2017 included products with calories consisting primarily of added sugars, such as Popsicles, Fruit Roll-Ups and Fruit Gushers, and Kool-Aid, as well as fried chicken nuggets and french fries from fast-food restaurants, and cereals consisting of approximately one-third added sugar.²³

Another concern that has been raised about the CFBAI nutrition standards is that they only apply to products shown in the advertisements. As a result, children’s food and drink brands may specify a subset of products that meet the nutrition standards to be featured in child-directed advertising. Even if the majority of products offered by the brand do not meet the nutrition standards, the brand can advertise directly to children either by only showing products that meet the nutrition standards, or by showing a brand logo without any products (as in banner ads on the internet). Some research has documented the extent of this limitation. In 2013, McDonald’s and Burger King specified just 12 kids’ meals (i.e., main dish, side, and drink) that met CFBAI nutrition standards and could be featured in their ads, out of 328 possible combinations of kids’ meals offered at their restaurants.²⁴ Similarly, in 2013 Kraft Foods offered five varieties of Lunchables that met nutrition standards and could be advertised to children and 37 additional varieties that did not meet the standards.²⁵ A small image of the approved products appeared on the majority of advertisements for the brand, while banner advertising on third-party websites often included a brand logo without a product image. Furthermore, the products that could be advertised received just 15% of the shelf space allocated to Lunchables in supermarkets, and they were significantly less likely to receive prime shelf placement at children’s eye level. These findings support the HER expert panel recommendation that “brands marketed to children contain only products that meet nutrition criteria.”

Ages of children covered

Another limitation of the CFBAI identified by the IOM and the HER expert panel is that company pledges to market only products that meet nutrition criteria to children apply only to children up to age 11. The IOM recommended that all

voluntary industry actions should address children ages 2 to 17,²⁶ while the HER expert panel specifically recommended that CFBAI should expand its protections to include children ages 12 to 14.²⁷ The HER panel cited several reasons that young teens should be covered. At this age, children may be even more susceptible to influence from unhealthy food marketing due to their unique stage of cognitive development; their greater exposure to forms of marketing that disguise their persuasive intent, such as product placements, social media, and mobile marketing; and their greater independence and higher levels of media consumption.²⁸ Furthermore, following CFBAI implementation, food and beverage companies substantially increased advertising to teens 12 to 17 years old. For example, from 2007 to 2012 teens' exposure to food-related TV advertising increased by 25%, while exposure for children (ages 2-11) increased 8%.²⁹

Protections for very young children (ages 2-5) in current CFBAI pledges also raise concerns. Although not required by the Initiative, most participating companies have pledged that they will not direct any advertising to children under 6 years old, even for products that meet CFBAI nutrition criteria.³⁰ These pledges address concerns identified by a large body of research demonstrating that young children (up to age 7 or 8) do not possess the cognitive ability to understand the persuasive intent of advertising.^{31,32} As a result, legal scholars have argued that all forms of advertising to very young children are inherently unfair and potentially misleading.^{33,34} Yet in 2009, young children 2 to 5 years old viewed just 14% fewer food-related ads on TV compared with children 6 to 11 years old,³⁵ and from 2009 to 2011, the number of ads viewed by young children increased by 9% to 11.9 food-related ads viewed per day by children under age 6.³⁶

Definitions of child-directed advertising

Additional limitations of CFBAI company pledges noted by the HER expert panel,³⁷ the IOM,³⁸ and the White House Taskforce³⁹ relate to how the Initiative defines “child-directed advertising” and forms of marketing that are not included in that definition. Currently, the Initiative covers “advertising” (defined by the American Marketing Association as the placement of persuasive messages purchased in mass media⁴⁰) and some additional forms of marketing, such as the use of licensed characters and marketing in elementary schools.⁴¹ In addition, advertising directed to children is defined as advertising in media where children under age 12 comprise 35% or more of the audience. Specifically, the HER expert panel recommended a broader definition of child-directed marketing that includes 1) media and other venues where children constitute 25% or more of the audience; 2) all marketing strategies, techniques, characteristics, and venues where children appear to be the target demographic for the advertising or marketing message; and 3) any marketing that is especially appealing to kids.

Previous research has documented limitations of the current CFBAI definition of child-directed advertising. Less than one-

half of food-related TV ads seen by children ages 2 to 5 and 6 to 11 appeared during programming that met these criteria in 2009 (46% and 44% of ads viewed, respectively).⁴² Much of the advertising that children see appears on programming that is viewed by large audiences, including both children and adults. However, the CFBAI definition does not include programming that is clearly child-directed, but also viewed by adults, such as Disney family movies and animated holiday specials, nor does it include programming that is viewed primarily by children and young teens, such as on Nick-at-Nite and Adult Swim “tween” networks.^{43,44} Similarly, an analysis of the most popular food company advergame websites (i.e., online food-branded games) in 2009 found that not one would qualify as child-directed according to the CFBAI criteria that 35% or more of visitors are children under age 12.⁴⁵ Furthermore, just because advertising is not exclusively aimed at children does not lessen its influence on children. As has been demonstrated by research on adult products, such as beer and cigarettes, advertising that uses techniques that appeal to children (e.g., Budweiser animated frogs and Joe Camel) affects children's attitudes and preferences for those products.⁴⁶⁻⁴⁹ As a result, the HER expert committee recommended that CFBAI requirements also apply to advertisements with techniques that appeal to children, such as animated and/or anthropomorphic spokespersons, regardless of where they appear.⁵⁰

The HER expert panel also recommended that other kinds of marketing should be considered child-directed and covered by CFBAI company pledges, including sponsorships of children's sports programming or other activities; cause marketing and other branded forms of philanthropy; mobile game apps for branded food and drinks; merchandising of food brand names and logos on toys and children's clothing; and marketing in theme parks, recreation centers, and other places where children gather, including all forms of marketing in schools.⁵¹ Notably, food company expenditures on product placements, athletic and event sponsorships, cross-promotion licenses, celebrity fees, and philanthropic marketing targeted to youth increased by 8% from 2006 to 2009, whereas child-targeted advertising in traditional media declined.⁵² Furthermore, youth-targeted marketing in digital media, including social media and mobile marketing, increased by 51% from 2006 to 2009, indicating that companies are focusing more of their youth-directed marketing to these newer media that cannot be assessed using traditional audience measurement techniques.

Voluntary participation

A final limitation of the CFBAI and other industry self-regulatory initiatives is that participation is voluntary. The number of companies participating in the CFBAI has increased from 11 initially to 18 in 2017, and now includes the majority of the largest U.S. food and beverage advertisers. The CCAI initiative includes an additional eight confectionary companies. However, evaluations conducted in 2009 showed that less than three-quarters of food-related advertisements

on children's TV programming were from participating companies,⁵³ while participating companies were responsible for 61% and 62% of all food-related TV ads seen by children ages 2 to 5 and 6 to 11 on all types of programming.⁵⁴ Notable non-participating companies include all fast-food and casual restaurants, except McDonald's and Burger King, and frequent advertisers on children's TV programming, including Chuck E. Cheese's, Topps (manufacturer of Ring Pops and other candy), and Perfetti van Melle (manufacturer of Airheads candy). In addition to expanding the number of food, beverage, and restaurant companies that belong to self-regulatory initiatives, the IOM⁵⁵ and White House Task Force on Childhood Obesity⁵⁶ recommended that media and entertainment companies should also set nutrition standards for products that can be advertised to children in their media properties.

This report

In this FACTS report, we assess food advertising to children in 2016, measure improvements and other changes since the CFBAI was implemented in 2007, and quantify progress and the continued impact of limitations in industry voluntary pledges to improve food advertising to children. This report focuses on a) measuring the extent and exposure of food, beverage and restaurant advertising viewed by children, using syndicated market research data, and b) assessing the nutritional quality of participating companies' products and brands featured in advertising viewed by children. When data were available, we compare 2016 results to 2007 and two intermediary years (2010 and 2013).

As the purpose of this report is to assess industry self-regulation on its stated goal to advertise only healthier dietary choices in child-directed advertising, we do not address other forms of marketing to children, such as in-store promotions, product packaging, in-school marketing, and sponsorships, not currently covered by the CFBAI. However, we do include advertising by food, beverage, and restaurant companies that do not participate in the CFBAI, as well as CFBAI participants, to identify opportunities to broaden participation in the Initiative. Similarly, we evaluate the extent of children's exposure to advertising that may not specifically target children, but that children nevertheless view frequently, including ads on all types of TV programming, children's visits to food company websites, banner advertising on third-party websites, and social media marketing. Furthermore, we define children as young people 2 to 14 years old, as recommended by the HER expert panel, and compare results for preschoolers (2-5 years), children (6-11 years), and young teens (12-14 years).

Specifically, this report quantifies:

- Advertising spending in all media, including TV advertising, in 2007, 2010, 2013, and 2016 (Nielsen data).
- TV advertising exposure by age group, including exposure to ads on children's TV programming, in 2007, 2010, 2013, and 2016 (Nielsen data).
- Advertising on third-party websites in 2016, including kids' websites and social media sites (comScore data).
- Child and teen visits to food, beverage, and restaurant company websites in 2016 (comScore data).
- Popularity and activity on food company-sponsored social media pages in 2016, including Facebook, Twitter, Instagram, and YouTube (Unmetric data).

In addition, we assess the nutritional quality of CFBAI companies' products and brands according to three nutrition standards: the CFBAI category-specific uniform nutrition criteria,⁵⁷ Smart Snacks nutrition standards for products that can be sold to children in schools,⁵⁸ and NPI score of overall nutrition content used to identify products that can be advertised to children in the United Kingdom.⁵⁹ Nutrition data were collected from company websites (if available) and other sources as of May 2017.

We analyzed the nutritional quality of three types of products:

- Products that CFBAI companies included on their lists of products than can be featured in child-directed advertising as of January 2017 (i.e., listed products);
- Other available products offered by the same brands (i.e., non-listed products); and
- Products offered by other CFBAI company brands that ranked among the top-50 brands in amount of TV advertising viewed by children on all types of TV programming.

The findings in this report serve to evaluate progress and identify further opportunities to improve industry self-regulatory efforts to reduce unhealthy food advertising to children in a way that encourages meaningful improvements in children's diets and their long-term health. The food industry should be applauded for any measurable improvements in food advertising directed to children. However, the food and media industries should also be held accountable for lack of progress in addressing concerns about the harmful effects of food and beverage marketing on children's diets and health that have been raised by public health experts.

GLOSSARY OF TERMS

Company and brand types

Term	Definition
CFBAI companies	Companies that participated in the Children's Food and Beverage Advertising Initiative (CFBAI) as of 2016.
CCAI companies	Companies that participated in the Children's Confection Advertising Initiative (CCAI) as of 2016.
Non-participating companies	Companies that did not participate in the CFBAI or CCAI as of 2016.
Top-50 brands	Brands that ranked among the 50 brands with the highest number of TV advertisements viewed by children ages 2 to 11 in 2016, including both CFBAI and non-participating brands.
CFBAI company terms	
I. CFBAI companies with child-directed advertising	Companies with CFBAI pledges to advertise only healthier dietary choices to children.
A. CFBAI listed brands	Brands from CFBAI companies with products that participants have indicated may be the subject of child-directed advertising as of July 2016.
1. CFBAI listed products	Individual products on the CFBAI list of products that may be the subject of child-directed advertising (a subset of all products offered by CFBAI listed brands).
2. CFBAI non-listed products	Individual products offered by CFBAI listed brands that are not on the CFBAI list of products that may be the subject of child-directed advertising. For example, Cheerios has three listed products (original, Honey Nut, and Banana Nut Cheerios), but the same brand offers 10 non-listed products (e.g., Frosted and Fruity Cheerios) that are not included on lists of products that may be in child-directed advertising.
B. CFBAI non-listed brands	Brands from CFBAI companies that do not have any products on the CFBAI list of products that may be the subject of child-directed advertising as of July 2016.
II. CFBAI companies that did not engage in child-directed advertising	Companies with CFBAI pledges to not advertise any products in child-directed media. All brands from these companies are non-listed brands.
CFBAI top-50 brands	Brands from CFBAI companies that ranked among the 50 brands advertised most to children on TV in 2016, including both listed and non-listed brands.
CFBAI less-advertised brands	Brands from CFBAI companies that did not rank in the top-50 brands advertised most to children on TV in 2016, including both listed and non-listed brands.
Non-participating company terms	
I. Non-participating top-50 companies	Non-participating food, beverage, and restaurant companies with at least one brand that ranked among the 50 brands with the highest number of TV advertisements viewed by children ages 2-11 in 2016.
A. Non-participating top-50 companies with child-directed brands	Non-participating top-50 companies that had at least one brand with advertising directed at children, as evidenced by advertising on children's TV and high ratios of ads viewed by children versus adults in 2016.
B. Non-participating fast food and other casual restaurants	Non-participating top-50 companies that did not have child-directed brands. These were all fast food or other casual restaurants.
II. Non-participating companies with healthy brands	Non-participating companies that advertised brands in the healthier fruit, vegetable, dairy, plain water, and nuts categories to children on TV in 2016.
III. All other companies	Non-participating companies that did not fall into any of the above categories. (We do not report data for these companies individually.)

Advertising spending and TV advertising

Term	Definition
Advertising spending	Total spending on advertising in 17 different media, including national (network, cable, and syndicated) and local (spot) TV, Spanish-language TV, internet, radio, magazines, newspapers, free standing insert coupons (FSIs), and outdoor advertising.
TV advertising spending	Spending on English-language advertising in national (network, cable, and syndicated) and local TV.
Spanish-language TV	TV programming presented on Spanish cable and broadcast networks (e.g., Univision, Telemundo). Spending on Spanish-language TV advertising is not included in TV advertising spending numbers.
TV viewing time	Average time spent watching TV by individuals in a specific age group, including TV programming on broadcast, cable, syndicated, and spot networks.
Average number of TV ads viewed	The number of TV ads viewed by individuals in a specific age group, on average, during the time period reported. This number is calculated using Nielsen gross ratings point (GRP) data. We do not report advertising viewed on local (i.e., spot TV).

Ads viewed per hour of TV viewing	The number of hours spent watching TV by individuals in a specific age group during a specific period of time divided by the number of TV ads viewed by the same individuals during the same time period.
Targeted ratios	A measure of relative exposure to TV advertising for youth versus adults, calculated by dividing TV ads viewed by preschoolers, children, or young teens by TV ads viewed by adults (ages 18-49).
Children's TV	As defined by Nielsen, includes the following program types: child day animation, child day live, child evening, child multi-weekly, and child news (e.g., programming on Nickelodeon, Cartoon Network, Nicktoons, and Disney XD).
Preschool TV	A subset of children's TV programming where preschoolers (ages 2-5) are the primary audience as defined by the networks (e.g., Nickjr and Sprout).
All other TV	All TV programming, excluding children's TV.
Child-directed advertising: CFBAI definition	Advertising in media where children (ages 2-11) comprise 35% or more of the total audience (as defined by the CFBAI).
Child-directed advertising: media industry definition	Advertising in media that market research and/or media companies have identified as targeted to children. Includes children's TV programming and kids' websites. These definitions approximate but may not completely correspond to the CFBAI definition.

Digital marketing: Banner advertising and company websites

Term	Definition
Banner ads	Ads that companies place on third-party websites, usually in a sidebar or "banner" at the top of a web page. Text, video, and html-based ads are not included.
Banner ad impressions	The total number of times any person viewed the banner ads in 2016. comScore does not report demographic information on who viewed the ads.
Third-party websites	Websites from other companies where food brands place their advertising.
Kids' websites	Websites identified by comScore as Family and Youth:Kids due to 70% or more website content related to kids.
Social media sites	Third-party social media websites where food brands place advertising. Banner ads placed on Facebook and YouTube in 2016 are reported.
Food company websites	Websites maintained by food, beverage, and restaurants brands and/or companies, includes websites visited by at least 31 children in any given quarter.
Average monthly unique visitors	Average number of different individuals visiting the website each month on the internet, reported for children (2-12 years) and teens (13-17 years). Data on visits to websites accessed through mobile devices are not available for youth under age 18.
% of total unique visitors	The number of unique child or teen visitors divided by the total number of unique visitors (including adults) to the website.

Digital marketing: Social media platforms

Term	Definition
Social media accounts	Accounts maintained by a company or brand to promote its products on one of the social media platforms examined (i.e., Facebook, Twitter, Instagram, and YouTube).
Social media popularity	The number of individuals who follow a brand or company's social media accounts (i.e., fans or followers).
Social media activity	The number of times a brand or company posted on its Facebook or Instagram account, tweeted on Twitter, or posted a video on YouTube.
Facebook	Online social networking platform on which brands or companies maintain accounts and promote their brand or products in "posts." When a user "likes" the brand or company account the user becomes a "fan."
Facebook fans	The total number of people who "liked" the brand or company page on Facebook as of December 31, 2016. Fans may receive copies of posts or notification that new content was added.
Facebook posts	The total number of posts that a brand shared on its Facebook page in 2016. Facebook posts include text, photo, and/or video content. Users have the opportunity to click "like" when viewing a post, click "comment" to comment on the post or click "share" to share the post with other users.
Twitter	Online social networking platform on which companies or brands maintain accounts (profiles) and promote their brands or products by posting short messages called "tweets."
Twitter followers	The number of Twitter users who had chosen to follow the company or brand on Twitter as of December 31, 2016.
Tweets	The total number of tweets shared by the company in 2016. We report new posts from the companies, and exclude retweets (reposts of others' tweets) and replies to users. Followers receive company tweets on their own Twitter timelines.
Instagram	Companies and brands maintain Instagram accounts where they share photos and videos to promote their products and invite users to post their own content.
Instagram followers	The number of individuals who had chosen to follow the company or brand on Instagram as of December 31, 2016. Followers may receive copies of posts or notification that new content was added to the company account.

Instagram posts	The total number of posts shared by the brand in 2016. Instagram posts contain photos or videos and may include hashtags and geotags for searching by other users.
YouTube	YouTube is a video network that enables companies and brands to upload and share videos for users to view. Companies maintain their own YouTube channels with videos they have uploaded.
Video views	The number of times individuals viewed the company's uploaded videos in 2016. A view is counted after a user has watched a video for approximately 30 seconds. Only videos viewed on the brand's YouTube channel are included.
Uploaded videos	The total number of new videos uploaded by the company or brand to its YouTube channel in 2016.

Nutrition analysis

Term	Definition
Nutrient content	Serving size (g), calories (kcal), saturated fat (g), total sugar (g), sodium (mg), fiber (g), and protein (g) per serving as provided on the product nutrition facts panel.
Ingredient information	When available, whole grain, fruit, vegetable, and nutritive and non-nutritive sweetener content are reported. This information was obtained from the list of ingredients reported under nutrition facts panels and other information provided by manufacturers on labels and/or company websites.
Main ingredients	Ingredients listed as one of the first five components of a product, as indicated on the ingredient list of the nutrition facts panel.
CFBAI category-specific uniform nutrition criteria	Nutrition criteria established by the CFBAI to identify products that may be the subject of child-directed advertising for all participating companies. These criteria include specific limits on calories, saturated fat, sodium, and total sugars for 13 different categories or subcategories of food and drink products.
NPI score	Measure of the overall nutrient composition of the food based on total calories and proportion of nutrients to encourage and limit. A score of 64 or higher identifies a nutritious food and 70 or higher identifies a nutritious beverage, the cut-offs used to identify nutritious products that can be advertised to children on TV in the United Kingdom.
Smart Snacks nutrition standards	All foods sold at school during the school day are required to meet Smart Snacks nutrition criteria established by the USDA. These criteria include specific limitations on calories, total fat, saturated fat, sodium and sugar for meals and snacks sold in schools.
Added sugars	Any type of sugar listed on the nutrition facts panel, including syrups (agave, corn, cane, brown rice, glucose, and high fructose corn), sugar, dextrose, sucrose, lactose, fructose, and honey.
Non-nutritive sweeteners	Any type of sweetener listed on the nutrition facts panel that is not a significant source of calories.

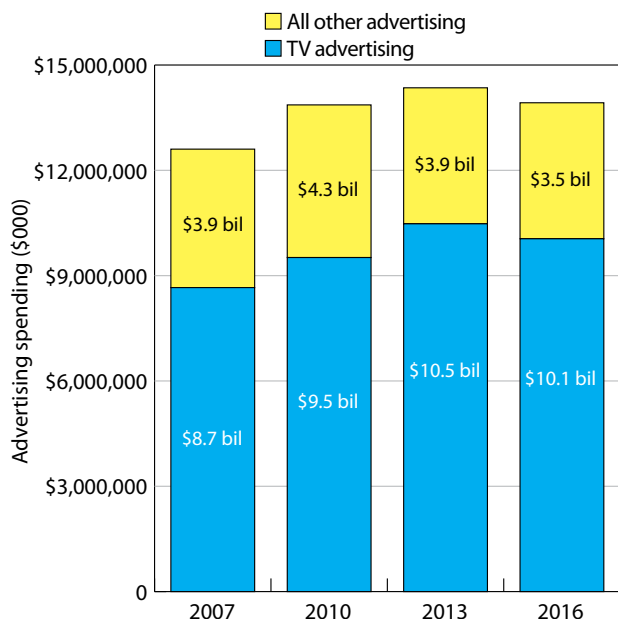
OVERVIEW OF FOOD ADVERTISING TO CHILDREN: 2007 TO 2016

Over 20,300 food, beverage, and restaurant companies advertised in all forms of media in 2016, totaling more than \$13.5 billion in advertising spending. Since 2007, the year the Children’s Food and Beverage Advertising Initiative (CFBAI) was implemented, total food-related advertising spending has increased, while children’s exposure to TV advertising declined.

From 2007 to 2016, _____ increased by 7%, in contrast to a more recent decline of 6% from 2013 to 2016 (see **Figure 1**). _____ totaled \$10 billion in 2016, and also declined from 2013 to 2016. However, during this time, companies increased the portion of their advertising budgets devoted to English-language TV, from 69% in 2007 to 74% in 2016, indicating a continued focus on television as the predominant form of food-related advertising.

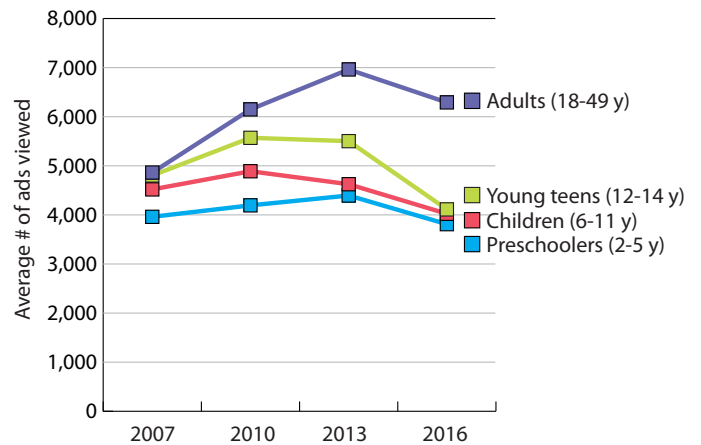
This TV advertising spending translated to on average 10 to 11 _____ by children in all age groups in 2016, including preschoolers (ages 2-5, 10.4 ads-per-day), children (ages 6-11, 11.0 ads-per-day), and young teens (ages 12-14, 11.3 ads-per-day).¹ Adults (ages 18-49) viewed over 50% more food-related TV ads in 2016 compared with children, averaging 19.1 ads-per-day. The number of food-related TV ads viewed by adults increased substantially from 2007 to 2016 (29%), despite a decline of 10% from 2013 to 2016

Figure 1. Changes in advertising spending by food, beverage, and restaurant companies



Source: Rudd Center analysis of Nielsen data (2017)

Figure 2. Changes in total food-related TV ads viewed by age group

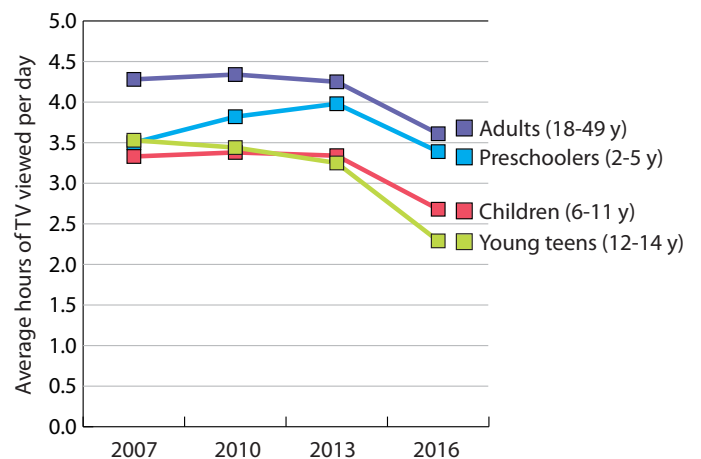


Source: Rudd Center analysis of Nielsen data (2017)

(see **Figure 2**). In contrast, children in all age groups (ages 2-14) saw fewer food-related TV ads in 2016 than in 2007, with declines of 4%, 11%, and 14% for preschoolers, children, and young teens, respectively. Notably, these declines occurred following initial increases in TV ads viewed from 2007 to 2010 and/or 2013 (changes varied by age group).

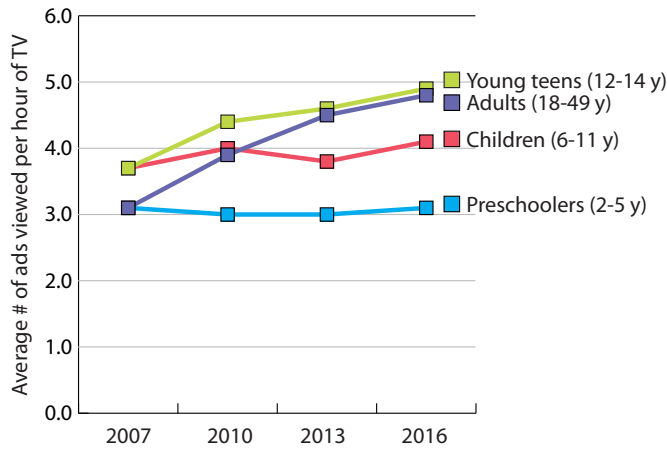
Much of the decline in TV ads viewed from 2013 to 2016 can be attributed to reductions in _____² (see **Figure 3**). From 2013 to 2016, TV viewing declined by 15% for preschoolers, 20% for children, and 30% for young teens. Adult TV viewing also declined by 15%. This decline followed

Figure 3. Changes in hours of TV viewed per day by age group



Source: Rudd Center analysis of Nielsen data (2017)

Figure 4. Changes in ads viewed per hour of TV viewing by age group



Source: Rudd Center analysis of Nielsen data (2017)

a notable increase of 14% from 2007 to 2013 for preschoolers only. However, preschoolers continued to watch far more TV daily than the recommended one hour of high-quality programming recommended by the American Academy of Pediatrics (AAP),³ averaging 3.4 hours per day in 2016. Notably, preschoolers also watched more TV than either children (averaging 2.7 hours per day) or young teens (averaging 2.3 hours per day). Furthermore, the difference between amount of time preschoolers spent watching TV compared with adults

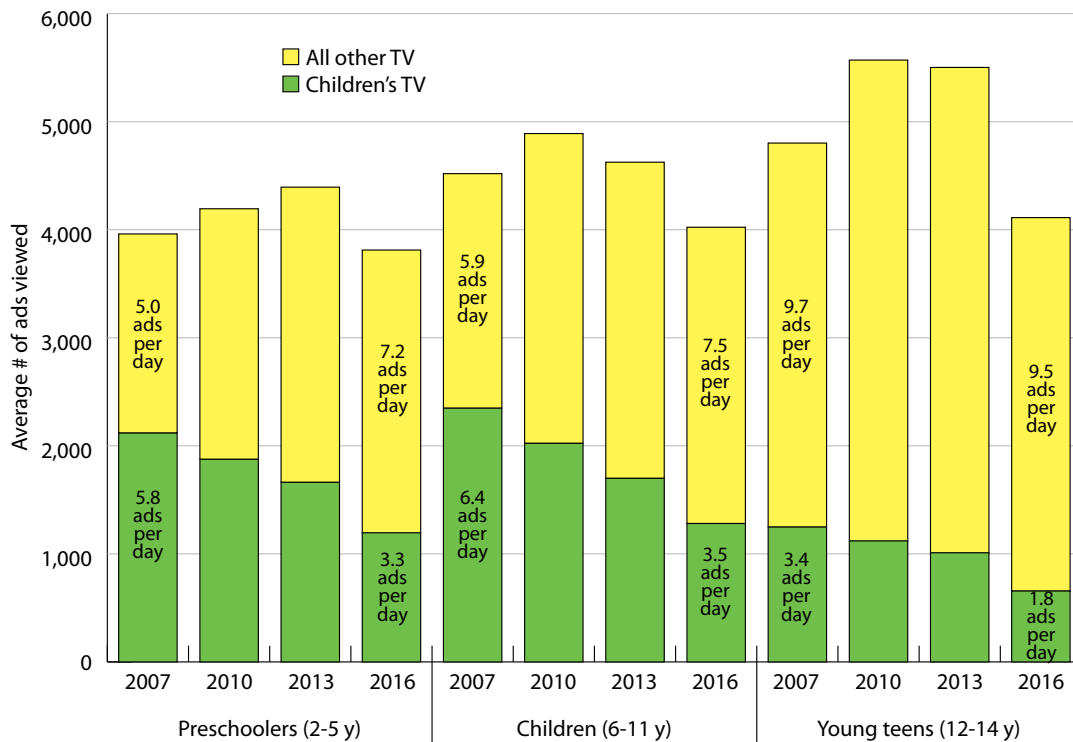
has narrowed over time. In 2016, preschoolers watched just 6% fewer hours of TV than did adults, versus 22% fewer in 2007.

Another factor affecting children's exposure to food-related TV advertising is the number of ads shown during TV programming. As has been documented in previous research,⁴ the number of _____

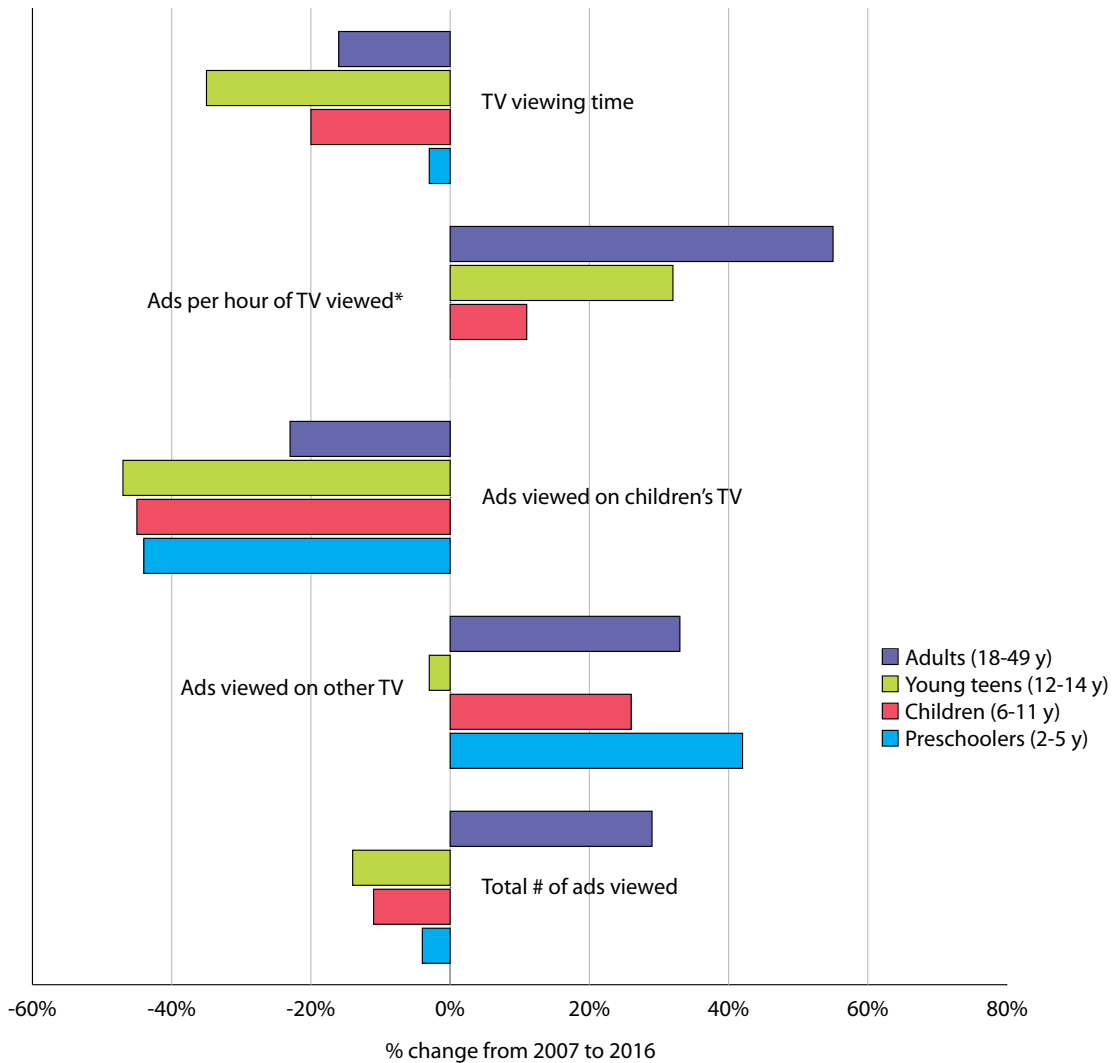
_____ increased from 2007 to 2016 for most age groups (see **Figure 4**). For children (ages 6-11), the rate of food advertising per hour increased by 11%, or 0.4 additional ads per hour of TV viewing. For young teens, this increase was 32%, an additional 1.2 ads per hour. In contrast, the number of ads per hour of TV viewing by preschoolers remained the same. Preschoolers are exposed to fewer ads per hour of TV viewing compared with other age groups due to a greater amount of time spent watching non-commercial TV, such as Disney and PBS.⁵

To compare changes in children's exposure to food-related TV advertising on _____ versus other types of TV, we utilized Nielsen's definition of children's TV,⁶ which includes networks, such as Nickelodeon, Cartoon Network, Nicktoons, and Disney XD. This definition corresponds approximately to the _____,⁷ although we did not measure audience share to ensure that all programs met the CFBAI definition (i.e., programs with audiences comprised of 35% or more children under age 12). This analysis showed opposite changes in exposure to TV advertising on children's TV programming versus _____ (see **Figure 5**). For all

Figure 5. Changes in food-related ads viewed on children's TV and all other TV by age group



Source: Rudd Center analysis of Nielsen data (2017)

Figure 6. Changes in TV viewing and food-related ads viewed by age group from 2007 to 2016

*There was no change in ads per hour of TV viewed by preschoolers

Source: Rudd Center analysis of Nielsen data (2017)

child age groups, food-related TV ads viewed on children's programming declined by approximately 45% from 2007 to 2016. In contrast, for preschoolers and children (but not young teens), exposure to food ads on other types of TV increased during this period, by 42% for preschoolers and 26% for children.

The decline in children's total exposure to food-related TV ads indicates some progress in the amount of food advertising directed to children since the CFBAI was implemented. However, reduced TV viewing contributed to much of the total decline, while increases in ads viewed on non-children's TV and increases in the number of food advertisements per hour of TV viewing (for children ages 6 to 14) largely offset the declines in advertising on children's TV (see **Figure 6**). Furthermore, although children's exposure to food-related TV advertising declined from 2007, it remained high, averaging 10 to 11 ads viewed per day in 2016.

Key findings

- Exposure to food-related TV advertising by children (ages 2 to 14) in 2016 averaged 10 to 11 ads per day. However, food advertising viewed by children in all age groups has declined – by 4% for preschoolers (ages 2-5), 11% for children (ages 6-11), and 14% for young teens (ages 12-14) – since 2007, the year the CFBAI was implemented. These declines occurred despite a 7% increase in total food-related ad spending during this time and a 29% increase in TV ads viewed by adults (ages 18-49).
- Much of this decline in food-related TV ads viewed by children is due to less time watching TV. From 2013 to 2016, amount of time spent watching TV declined by 15% for preschoolers, 20% for children, and 30% for young teens.
- The number of food-related ads viewed on children's TV programming has also declined steadily since 2007, by

approximately 45% for preschoolers and children and 47% for young teens.

- However, these reductions have been largely offset by two factors. The number of food-related ads shown per hour of TV viewing has increased for all age groups except preschoolers, due to an increase in ads shown per hour on other (not children's) TV programming. In 2016, children and young teens viewed 4.1 and 4.9 food-related ads per hour of TV watched, respectively.
- In addition, children and preschoolers (but not young teens) viewed substantially more food-related ads on other (not children's TV) programming in 2016 than in 2007, with increases of 42% and 26% for preschoolers and children, respectively.

Food companies in our analysis

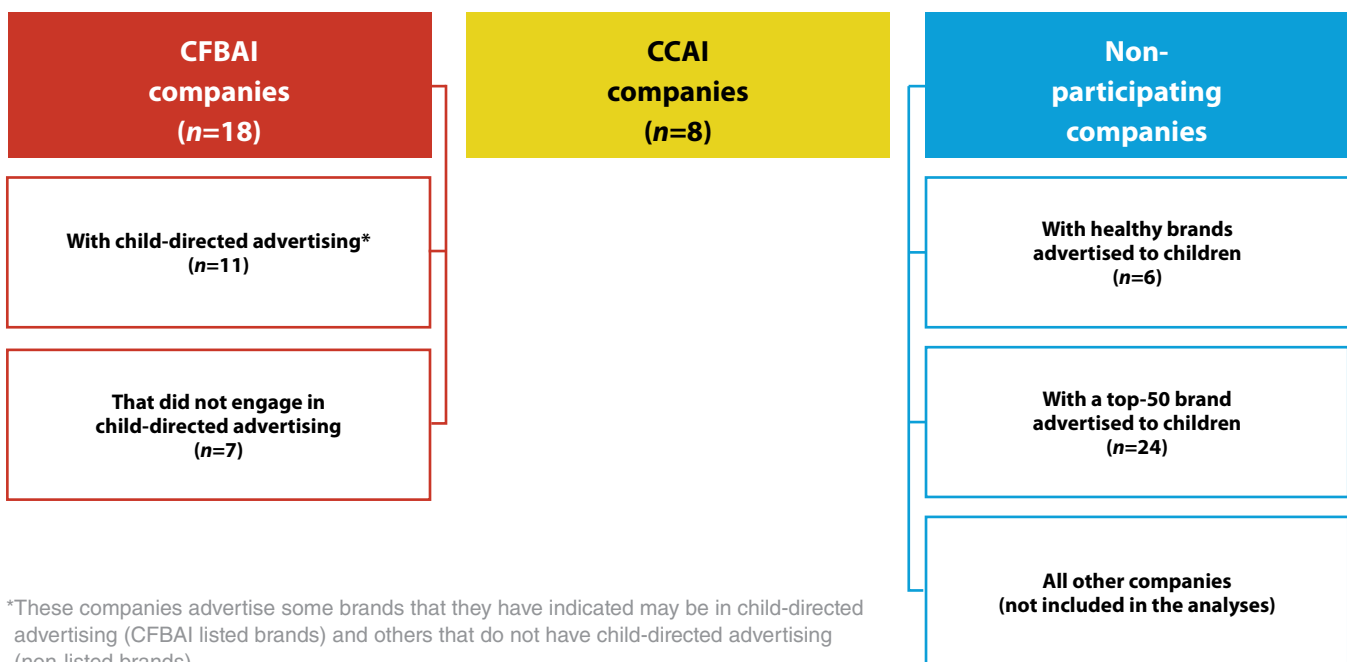
To evaluate contributors to food-related advertising directed to children, we first identified food, beverage, and restaurant companies that participated in the CFBAI or the Children's Confection Advertising Initiative (CCAI) food advertising self-regulatory programs. Within CFBAI companies, we also differentiated between companies that have pledged to advertise only healthier dietary choices to children from companies that pledged to not engage in child-directed advertising (for any of their products).⁸ For CFBAI companies with child-directed advertising, we further differentiated brands with products included on the list of products that may be advertised to children as of July 2016 (i.e., CFBAI listed brands),⁹ and brands that did not include any products on the list (i.e., non-listed brands). Given the large number of

companies that do not participate in CFBAI or CCAI, we also examined non-participating companies with food, beverage, or restaurant brands that ranked in the top-50 by number of TV advertisements seen by preschoolers, children, and/or young teens in 2016. In addition, we examined a subset of non-participating companies that advertised brands in the healthier fruit, vegetable, dairy, plain water, and nuts categories, for which children saw 10 or more TV ads in 2016. **Figure 7** indicates the number of companies examined within each type.

Table 2 lists the companies examined within each company type. The two food industry self-regulatory programs included a relatively small number of companies: 18 participated in the CFBAI as of July 2016, 7 of which pledged to not direct any advertising to children under 12; and 8 belonged to the CCAI. Among the non-participating companies in our analysis, 24 had brands that ranked among the top-50 brands with the most TV advertising viewed by children; while 6 had healthy brands with TV advertising to children.

Although relatively small in number, these 56 companies were responsible for 71% of all advertising spending by food, beverage and restaurant companies in 2016, totaling \$9.7 billion (see **Figure 8**). They were also responsible for 74% of TV advertising spending (\$7.4 billion). _____ represented 54% of all food-related advertising spending in 2016 (\$5.9 billion). However, brands with products that participating companies indicated may appear in advertising directed to children (i.e., CFBAI listed brands) represented just 6% of total ad spending (\$736 million) and 5% of all TV ad spending (\$542 million). _____ represented another one-quarter of total advertising spending in 2016 (\$3.4 billion), and 30% of TV

Figure 7. Types of food companies analyzed in this report



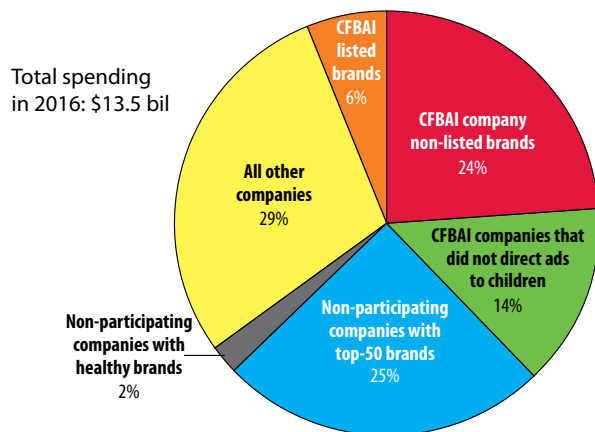
*These companies advertise some brands that they have indicated may be in child-directed advertising (CFBAI listed brands) and others that do not have child-directed advertising (non-listed brands).

Table 2. Companies included in this report

CFBAI companies ¹⁰			
With child-directed advertising	Burger King Campbell Soup Company ConAgra Foods The Dannon Company	General Mills Kellogg Company The Kraft Heinz Company McDonald's	PepsiCo Post Foods Unilever
That do not direct advertising to children	American Licorice Company The Coca-Cola Company Ferrero USA	The Hershey Company Mars	Mondelez Global Nestle USA
CCAI companies			
	Brown & Haley Ferrara Candy Company Ghirardelli Chocolate	Jelly Belly Candy Company Just Born Quality Confections R.M. Palmer Company	The Promotion in Motion Companies Wolfgang Candy Company
Non-participating companies			
With a top-50 brand	Applebee's Grill & Bar* Arby's* The Bel Group Chili's Grill & Bar* Chuck E. Cheese's Dairy Queen* Dave & Buster's Denny's Restaurant	Domino's Pizza Golden Corral Restaurant KFC* Little Caesar's Restaurant Olive Garden Outback Steakhouse Papa John's Perfetti Van Melle	Pizza Hut* Popeye's Red Lobster Sonic Subway Taco Bell* The Topps Company Wendy's
With healthy brands advertised to children	Birds Eye Chobani	Dole Food Company MilkPEP	WhiteWave Foods Co The Wonderful Company

*Fast food and casual restaurant chains that belong to larger companies with multiple restaurants (e.g., Yum Brands! restaurants) are listed as separate companies

Figure 8. Total food-related ad spending by company type in 2016



Source: Rudd Center analysis of Nielsen data (2017)

ad spending (\$3.0 billion). _____ to children spent just \$290 million in total advertising and \$198 million in TV advertising in 2016, less than 2% of the total. _____ spent only \$18 million in total advertising, or less than 1% of the total.

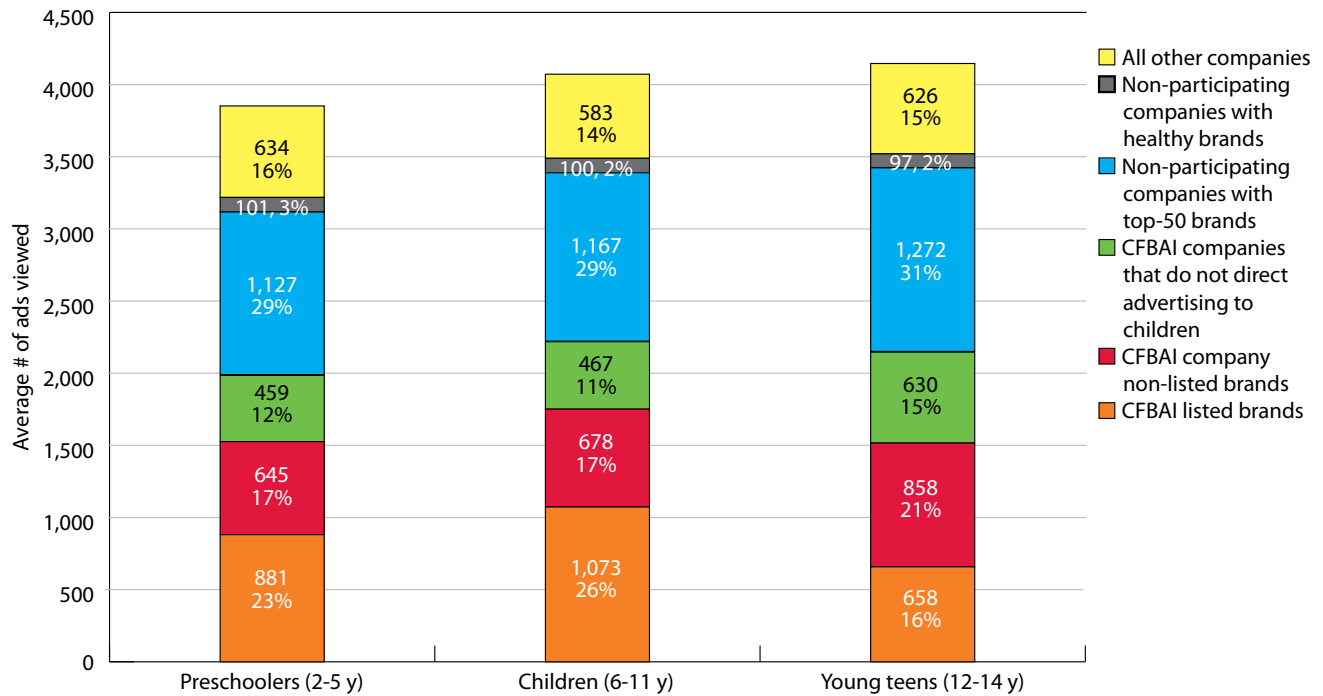
As with advertising spending, CFBAI companies contributed more than one-half of TV ads viewed by children in all age groups in 2016 (see **Figure 9**). However, fewer than one-half of those ads were for _____. This proportion was lowest for _____.

young teens, who saw 3.4 times as many ads for _____ than for CFBAI listed brands. TV ads from non-participating companies with top-50 brands represented approximately 30% of all food-related TV ads viewed by all child age groups, while non-participating companies with healthy brands represented 3% or less of all food-related TV advertising viewed by all children. In total, the companies in our analysis were responsible for approximately 85% of all food-related TV advertising viewed by children in all age groups.

From 2007 to 2016, TV ads viewed (on all TV programming) by preschoolers and children declined by approximately 30% for CFBAI companies, while ads from all other companies increased—by 56% for preschoolers and 39% for children. As a result, CFBAI companies' contribution to food-related ads viewed by preschoolers and children declined from 70% and 71%, respectively, in 2007 to just over one-half in 2016 (52% and 55%). There were fewer changes for young teens, with CFBAI companies contributing 62% of the food-related TV ads they viewed in 2007 versus 52% in 2016.

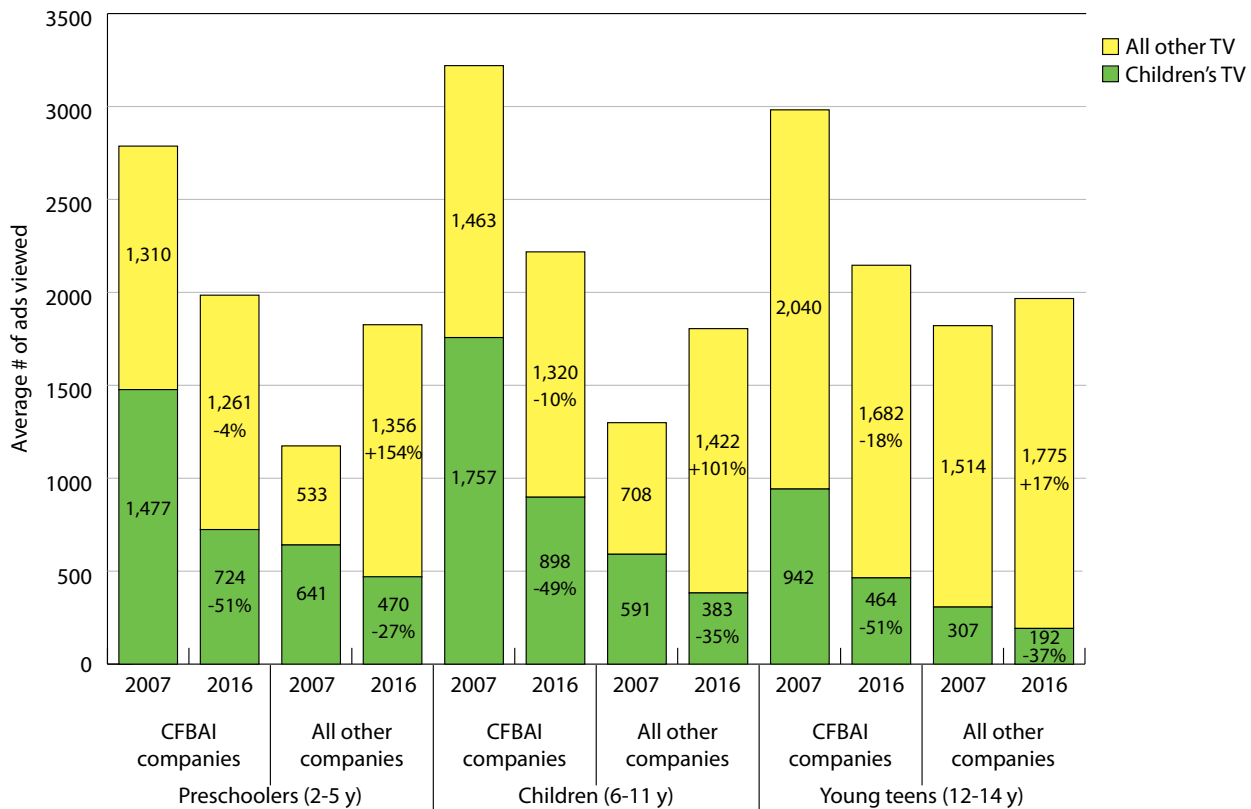
On children's TV, CFBAI companies were responsible for 61% of food-related ads viewed by preschoolers and approximately 70% of ads viewed by children and young teens in 2016. These proportions declined from 73% and 77%, respectively, in 2007. As on TV overall, advertising by CFBAI companies to all child age groups declined on children's TV from 2007 to 2016. Advertising by all other companies on children's TV also decreased, but at a lower rate (see **Figure 10**).

Figure 9. Food-related TV ads viewed by company type and age group in 2016



Source: Rudd Center analysis of Nielsen data (2017)

Figure 10. Changes in TV ads viewed by type of TV, company type and age group



Source: Rudd Center analysis of Nielsen data (2017)

However, advertising for non-participating companies on all other TV more than doubled for preschoolers, and increased by 91% and 16% for children and young teens, respectively. Altogether, declines in CFBAI company advertising on children's TV were far greater than declines in their advertising on all other TV programming. In contrast, advertising for non-participating companies increased on other TV programming but decreased on children's TV.

Key findings

- Just 56 of the more than 20,300 food companies advertising in 2016 were responsible for 71% of all food-related advertising spending and 85% or more of TV food advertising viewed by children in all age groups in 2016.
- The 18 companies in the CFBAI contributed 44% of total food-related advertising spending, and more than one-half of all food-related TV advertising viewed by children. Fewer than one-half of TV ads from CFBAI companies viewed by children were for brands with products included on CFBAI company lists of products that may be in child-directed advertising.
- It is important to note that ads for brands that were not included on CFBAI product lists did not appear on children's TV programming, so companies did comply with their pledges to not advertise these products in child-directed media.
- In 2016, CFBAI companies placed more than 60% of all ads viewed by preschoolers on children's TV programming and approximately 70% of ads viewed by children and young teens, but the number of CFBAI company ads viewed on children's TV declined by approximately 50% for all child age groups from 2007 to 2016. Children's exposure to CFBAI company ads on other types of TV programming also declined during this time, but at lower rates (by 4% for preschoolers, 10% for children, and 18% for young teens).
- Food-related ads from all non-participating companies viewed on children's TV programming also declined from 2007 to 2016, but at lower rates, by 27% for preschoolers and

approximately 35% for children and young teens. However, non-participating company ads viewed by preschoolers and children on other TV programming (not children's TV) increased by approximately two-fold during this time, compared with a much lower increase of 16% for young teens. As a result, preschoolers' exposure to advertising by non-participating companies increased by 56% from 2007 to 2016, while children's exposure increased 39%.

Digital marketing

We examined three forms of marketing in digital media: _____ placed on _____, visits to _____, and food company-sponsored _____. Previous research has shown that food companies' use of these types of digital marketing is changing rapidly, but in different directions. Among youth audiences, visits to traditional websites on the internet is declining,¹¹ which has also resulted in reduced exposure to banner advertising on third-party websites. On the other hand, young people's access to the internet through mobile devices is growing steadily,¹² including their use of social media platforms.¹³ As a result, marketing on social media, including advertising placed on social media sites and engagement with companies' own social media accounts, has risen steeply.¹⁴ Facebook and Twitter have traditionally attracted large numbers of young people, including to food, beverage, and restaurant brand pages,¹⁵⁻¹⁷ while more recently Instagram and YouTube have become popular platforms for brands to attract youth.¹⁸

Banner advertising on third-party websites

The 56 companies in our analysis placed a total of 509 million banner ad impressions on _____¹⁹ (e.g., Nick.com, CartoonNetwork.com) in 2016, while these same companies placed 3.4 billion ads on two _____ (Facebook and YouTube) (see **Table 3**). However, these ads represented just 2% and 12%, respectively, of all banner ads placed by these companies. The number of banner ads placed on third-party teen websites²⁰ by these companies was very low (just 11.5 million). Other social media sites where ads for

Table 3. Banner ads on kids' websites and social media sites in 2016

	Banner ads on kids' websites			Banner ads on social media sites*	
	# brands/companies with advertising on kids' websites	# of ad impressions (000)	% of total company impressions	# of ad impressions (000)	% of total company impressions
CFBAI companies	126	473,406	2%	2,872,807	12%
CCAI companies	2	183	0%	3,204	8%
Non-participating companies					
With top-50 brands	17	34,768	1%	485,507	15%
With healthy brands	2	454	1%	2,420	7%

*Facebook and YouTube

Source: comScore Ad Matrix Advertiser report (January - December 2016)

Table 4. Food-company websites visited by children in 2016

	# websites	Avg monthly unique visitors (000)				Avg proportion of total unique visitors	
		Children (2-12 y)		Teens (13-17 y)		Children (2-12 y)	Teens (13-17 y)
		Median	(Range)	Median	(Range)		
CFBAI companies	152	0.6	(<0.0-85.8)	1.0	(<0.0-125.5)	6%	7%
CCAI companies	2	n/a	(0.8-6.1)	n/a	(2.8-5.1)	5%	6%
Non-participating companies:							
With top-50 brands	26	10.5	(0.1-139.4)	9.5	(0.1-136.9)	6%	4%
With healthy brands	1	n/a	0.3	n/a	0.4	1%	2%

Source: comScore Media Metrix Key Measures report for children & teens (January - December 2016)

companies in our analysis appeared include Tumblr and Hulu, totaling just 17.2 million and 5.7 million ads, respectively. Due to low numbers, we do not report banner advertising appearing on teen websites, Tumblr, or Hulu.

CFBAI companies placed 473 million banner ads for 126 different brands on kids' websites in 2016, compared with just 35 million ads placed by 17 non-participating companies in our analysis. CFBAI brands that advertised on kids' websites also placed more ads on Facebook and YouTube in 2016 (2.9 billion), compared with less than 500 million ads placed by the non-participating companies. CCAI companies and non-participating companies with healthy brands placed some ads on kids' websites and on social media sites, but the numbers were low compared to the other companies in our analysis.

Visits to food-company websites

CFBAI companies also maintained substantially more websites that were visited by enough children (ages 2-12) in 2016 to measure in comScore²¹ compared with the non-participating companies in our analysis (see **Table 4**). However, the majority of these websites averaged less than 1,000 _____ in 2016, resulting in a median of just 600 child visitors per month. Approximately three-quarters of the non-participating companies with top-50 brands had websites with enough child visitors in 2016 to measure, and these sites tended to attract more child visitors than CFBAI company sites. CCAI companies and non-participating companies with healthy brands had just three websites together with enough child visitors to measure.

Table 5. Popularity of social media accounts and activity by company type in 2016

	# of accounts	Avg # of platforms per account	Facebook		Twitter		Instagram				
			Fans (000)*	Posts	Followers (000)*	Tweets	Fans (000)*	Posts			
			Median	(Range)	Median	(Range)	Median	(Range)	Median		
CFBAI companies	44	3.0	891	(<1-12,700)	55	33	(2-3,331)	1,525	18	(1-970)	151
CCAI companies	9	2.4	92	(3-1,568)	129	16	(5-87)	456	29	(26-31)	150
Non-participating companies:											
With top-50 brands	27	3.9	2,757	(1-39,600)	201	343	(5-2,420)	10,115	134	(3-479)	127
With healthy brands	9	3.9	704	(300-1,919)	146	22	(10-104)	845	14	(1-32)	178
YouTube											
			Total views (000)		Videos posted						
			Median	(Range)	Median						
CFBAI companies			14,000	(22-1,250,000)	28						
CCAI companies			1,727	(697-5,925)	12						
Non-participating companies:											
With top-50 brands			4,754	(97-60,100)	43						
With healthy brands			3,412	(208-25,700)	25						

*As of December 31, 2016

Source: Rudd Center analysis of Unmetric data (January – December 2016)

Although the numbers of children visiting CFBAI company websites tended to be small, children were almost as likely to visit these sites compared to teens. However, proportions of teen visitors to CFBAI sites were comparable to teen visitors to the internet in total, whereas _____ tended to be lower. In 2016, teens represented 7% of all unique visitors to the internet and children represented 10%. Although the numbers of children and teens visiting websites for top-50 brands from non-participating companies tended to be much higher than visitors to CFBAI websites, these sites also attracted more visitors of all ages.

Social media

The majority of companies in our analysis maintained active _____ accounts in 2016, and most also maintained one or more active _____, _____, or _____ accounts (see **Table 5**).²² CFBAI and CCAI companies averaged fewer accounts compared with the non-participating companies in our analysis, and their Facebook, Twitter, and Instagram accounts tended to be much less popular (i.e., fewer fans and followers) than accounts from non-participating companies with top-50 brands. However, CFBAI company YouTube channels had far more _____ than accounts from the other types of companies analyzed and they posted more often on Instagram than did non-participating companies with top-50 brands. Notably, despite their relatively low advertising budgets, 100% of CCAI companies and non-participating companies with healthy brands maintained active social media accounts. Companies with healthy brands also averaged 3.9 platforms per account, comparable to non-participating top-50 company accounts. They also posted most frequently on Instagram, and their YouTube channels tended to be popular with a median of 3 million views.

Key findings

- On the internet, CFBAI companies dominated in banner advertising on third-party kids' websites (totaling 473 million ad impressions in 2016). However, both CFBAI and non-participating companies placed more than ten times as many ads on Facebook and YouTube than on kids' websites.
- CFBAI companies maintained 152 websites with enough child visitors to measure in comScore, but the majority of these sites attracted fewer than 1,000 children (ages 2-12) per month.
- Although non-participating companies with top-50 brands did not directly target children with advertising on third-party kids' websites, the majority maintained their own websites, and many ranked among the most popular food company sites, attracting as many as 139,000 children per month.
- In contrast to relatively low levels of marketing on the internet for the companies in our analysis, the majority of CFBAI and non-participating companies maintained active Facebook accounts in 2016, as well as Twitter, Instagram, and/or YouTube accounts.
- The number of fans/followers and posts/tweets/videos posted to these accounts varied widely, but as a group, non-participating companies with top-50 brands tended to have the most popular accounts on Facebook, Twitter, and Instagram, while CFBAI companies surpassed them in YouTube video views and Instagram posts.
- Although CCAI companies and non-participating companies with healthy brands had relatively little or no advertising spending in 2016, nearly all maintained popular and active Facebook, Twitter, Instagram, and YouTube accounts.

ADVERTISING BY CFBAI COMPANIES

The 18 companies that participated in the CFBAI (as of December 31, 2016) included 11 companies that pledged to feature only products that meet CFBAI's category-specific uniform nutrition criteria in child-directed advertising and seven that pledged not to engage in child-directed advertising to children under 12.¹ These companies were responsible for 44% of all food-related advertising spending in 2016 and more than one-half of food-related TV ads viewed by preschoolers and children. They also placed more than 90% of food-related banner ads viewed on kids' websites.

For the CFBAI brands with products that may be featured in child-directed advertising (i.e., CFBAI listed brands) as of July 2016,² we used Nielsen data to identify brands that ranked among the 50 brands with the most TV advertising viewed by children ages 2 to 11 in 2016 (i.e., top-50 CFBAI listed brands). All other brands with products on the CFBAI lists were classified as less-advertised CFBAI listed brands. In addition, we used Nielsen data to identify other brands from CFBAI companies that ranked among the top-50 brands with TV advertising viewed by children under age 12 (i.e., non-listed top-50 brands).

This analysis identified 16 CFBAI listed brands from six companies that ranked in the top-50 brands advertised to children, and another 31 less-advertised CFBAI listed brands (see **Table 6**). Another nine brands from eight CFBAI companies were not included on CFBAI lists of brands that may be featured in child-directed advertising, but ranked in the top-50 brands with the most TV advertising to children

Table 6. CFBAI companies with child-directed brands

Company	CFBAI listed brands*		
	Top-50 brands	Less-advertised brands*	Non-listed top-50 brands
Burger King	None	Kids' Meals	All other products
Campbell Soup Company	Pepperidge Farm Goldfish	Bolthouse Farms	
ConAgra Foods	None	Chef Boyardee Kid Cuisine Peter Pan Peanut Butter	
The Dannon Company	None	Activia, DanActive, Danimals, Dannon (Yogurt and Dairy Drinks), Light & Fit (Yogurt and Dairy Drinks), Oikos Yogurt	
General Mills	Betty Crocker Fruit Snacks (Fruit by the Foot, Fruit Gushers, Fruit Roll-ups) Big G Cereals** Cheerios Cinnamon/French Toast Crunch Cocoa Puffs Lucky Charms Yoplait Go-Gurt	Cookie Crisp Golden Grahams Monsters cereals (Boo Berry, Franken Berry, Count Chocula) Reese's Peanut Butter Puffs Trix Yoplait Trix and Kid Cup	Yoplait Yogurt
Kellogg Company	Froot Loops Frosted Flakes	Apple and Cinnamon Jacks Corn Pops Eggo (Waffles and Bites) Frosted Mini-Wheats Rice Krispies Scooby Doo cereal	Pop Tarts
The Kraft Heinz Company	Capri Sun Lunchables Kraft Macaroni & Cheese Kool-Aid	Kraft Polly-O Kraft Singles	
McDonald's	Happy Meal	None	All other products
PepsiCo	None	Quaker (Oats and Instant Oatmeal) Quaker Life	Lays Potato Chips
Post Foods	Pebbles (Fruity and Cocoa)	Alpha-Bits Honey-Comb Fruity Pebbles Treats	
Unilever	None	Popsicle	

*Brands included on CFBAI list of products that may be in child-directed advertising as of July 2016⁶

** TV ads for Big G Cereals featured and promoted multiple General Mills listed cereals

Source: Rudd Center analysis of Nielsen data (2017)

Table 7. CFBAI companies that did not engage in child-directed advertising

Company	Top-50 brands
The Coca-Cola Company	Coca-Cola
The Hershey Company	Hershey's Kit Kat Reese's Peanut Butter Cups
American Licorice Company	None
Ferrero USA	None
Mars	None
Mondelez Global	None
Nestle USA	None

Source: Rudd Center analysis of Nielsen data (2017)

under 12 (see **Tables 6 and 7**). Five of the seven companies that pledged to not engage in child-directed advertising did not have any brands among the top-50 with the most TV advertising viewed by children.

It should be noted that CFBAI company pledges do not address children's exposure to food advertising in all media or in all types of TV programming.³ Therefore, companies can advertise any products in TV programming that is widely viewed by children, as long as those programs do not meet the CFBAI definition of child-directed (i.e., children under age 12 comprise more than 35% of the total audience). As previous research has shown, children's programs that also include large adult audiences (e.g., Disney movies, holiday cartoon specials) and programs that are viewed primarily by youth under age 18, including children and teens (e.g., programs on Nick-at-Nite and Adult Swim), do not qualify as child-directed according

to CFBAI definitions.^{4,5} This practice can result in children's exposure to advertising for brands that are not included on CFBAI companies' lists of products that meet CFBAI nutrition criteria and/or brands from companies that have pledged to not engage in any form of child-directed advertising.

Advertising spending

Of the \$5.9 billion spent by CFBAI companies to advertise their brands in 2016, just 12% (\$0.7 billion) promoted listed brands with products that may be advertised in child-directed media (see **Figure 11**). CFBAI companies with any child-directed brands spent more than four times as much to advertise their non-listed brands. CFBAI companies that pledged to not engage in any child-directed advertising represented one-third of all CFBAI company ad spending.

From 2007 to 2016, _____ by all CFBAI companies decreased slightly (by 6%), primarily due to a 16% decrease in spending on non-listed brands from companies with child-directed advertising. Advertising spending on _____ also declined slightly, by 4% from 2007 to 2016. In contrast, total advertising by the seven companies pledging not to engage in child-directed advertising increased by 15% (an increase of \$258 million).

Total advertising spending by individual CFBAI companies varied widely (see **Table 8**). For example, McDonald's and PepsiCo spent almost \$800 million each in 2016, while American Licorice spent just \$3,000. However, the majority of companies spent more than \$300 million in total advertising. Among CFBAI companies with products that may be featured in child-directed

Figure 11. Changes in total ad spending by CFBAI companies for listed and non-listed brands

Source: Rudd Center analysis of Nielsen data (2017)

Table 8. CFBAI company advertising spending on listed and non-listed brands in 2016

Company	Listed brands		Non-listed brands
	Total ad spending (\$ mil)	% of total spending	Total ad spending (\$ mil)
General Mills	\$259.5	45%	\$316.4
The Kraft Heinz Company	\$125.1	23%	\$416.9
Kellogg Company	\$116.1	34%	\$227.3
The Dannon Company	\$96.3	94%	\$5.7
PepsiCo	\$68.1	9%	\$721.1
McDonald's	\$32.8	4%	\$765.6
Campbell Soup Company	\$27.6	20%	\$108.4
Post Foods	\$8.4	11%	\$70.3
ConAgra	\$1.1	1%	\$73.8
Unilever	\$0.7	<1%	\$218.7
Burger King	\$0	0%	\$314.0
Companies that did not engage in child-directed advertising:			
The Coca-Cola Company	n/a		\$514.3
Mars	n/a		\$458.5
The Hershey Company	n/a		\$416.5
Nestle USA	n/a		\$309.6
Mondelez Global	n/a		\$176.9
Ferrero USA	n/a		\$68.2
American Licorice Company	n/a		\$3

Source: Rudd Center analysis of Nielsen data (2017)

advertising, the proportion of spending on CFBAI listed brands also varied widely. More than 90% of Dannon advertising was devoted to CFBAI listed brands, followed by General Mills at 45%. General Mills also spent almost \$260 million on its listed brands, more than any other CFBAI company. Campbell, Kraft Heinz, and Kellogg allocated 20% to 34% of their advertising spending to listed brands, while Conagra, PepsiCo, and McDonald's allocated less than 10%. Burger King did not advertise its one listed brand (Kid's Meal) at all in 2016.

CFBAI listed brands

The 16 _____ that ranked in the top-50 brands with the most TV advertising to children included seven brands from General Mills and four Kraft Heinz brands, as well as two Kellogg brands and one brand each from McDonald's, Campbell Soup, and Post Foods (see **Table 9**). Total spending per brand ranged from \$4 million for Cocoa Puffs to \$125 million for Cheerios (see **Appendix Table A1**). Ten of these brands allocated more than 80% of their total spending to _____, but seven brands spent a relatively high proportion of their advertising in other media. Big G Cereals spent almost \$32 million on _____, while Cheerios, Capri Sun, Pebbles, and Pepperidge Farm Goldfish all spent at least \$2 million. Capri Sun, Kraft Macaroni & Cheese, Lunchables, and Pepperidge Farm Goldfish all spent at least \$6 million on national magazine ads, including \$43 million for Lunchables. Big G Cereals was the only brand with substantial spending in FSI coupons (over \$1.6 million), and Lunchables was the only brand that purchased advertising in the national Sunday supplement (\$2.6 million).

Table 9. Advertising spending by top-50 CFBAI listed brands in 2016

Company	Brand	Total ad spending (\$ mil)	TV % of total*	Change in total ad spending from 2007
General Mills	Cheerios	\$124.8	89%	10%
General Mills	Big G Cereals	\$79.7	58%	276%
The Kraft Heinz Company	Lunchables	\$61.6	26%	103%
McDonald's	Happy Meal	\$32.9	84%	-33%
The Kraft Heinz Company	Capri Sun	\$30.9	30%	61%
The Kraft Heinz Company	Kraft Macaroni & Cheese	\$28.5	62%	-15%
Campbell Soup Company	Pepperidge Farm Goldfish	\$27.6	70%	71%
General Mills	Cinnamon/French Toast Crunch	\$24.9	100%	168%
Kellogg Company	Frosted Flakes	\$24.5	100%	102%
General Mills	Yoplait Go-Gurt	\$10.9	93%	4%
General Mills	Lucky Charms	\$9.1	99%	-25%
Post Foods	Pebbles	\$8.4	50%	-35%
Kellogg Company	Froot Loops	\$5.5	97%	-38%
General Mills	Betty Crocker Fruit Snacks	\$5.0	100%	-70%
The Kraft Heinz Company	Kool-Aid	\$4.0	97%	-80%
General Mills	Cocoa Puffs	\$4.0	100%	39%

*English-language TV advertising

Source: Rudd Center analysis of Nielsen data (2017)

Table 10. Advertising spending by less-advertised CFBAI listed brands

Company	Brand	Total ad spending (\$ mil)	TV % of total*	Change in total ad spending from 2007
The Dannon Company	Activia, DanActive, Danimals, Dannon, Light & Fit, Oikos Yogurt	\$96.3	96%	-7%
Kellogg Company	Apple/Cinnamon Jacks, Corn Pops, Eggo, Frosted Mini-Wheats, Rice Krispies, Scooby Doo cereal	\$86.1	69%	-33%
PepsiCo	Quaker Life, Quaker Oats	\$68.1	71%	107%
General Mills	Monsters cereals, Cookie Crisp, Golden Grahams, Reese's Peanut Butter Puffs, Trix, Yoplait (Trix, Kid Cup)	\$1.2	100%	-96%
ConAgra	Kid Cuisine, Peter Pan Peanut Butter, Chef Boyardee	\$1.1	92%	-95%
Unilever	Popsicle	\$0.7	100%	-80%

*English-language TV advertising

Source: Rudd Center analysis of Nielsen data (2017)

From 2007 to 2016, nine brands increased their total ad spending. Big G Cereals, Lunchables, Cinnamon Toast Crunch, and Frosted Flakes more than doubled their ad spending, with increases of \$58 million for Big G Cereals and \$31 million for Lunchables. Of the seven brands that decreased total spending from 2007 to 2016, Kool Aid and Betty Crocker Fruit Snacks advertising declined the most, with decreases of \$15 million (80%) and \$12 million (70%), respectively. However, most of the increased advertising occurred from 2007 to 2013. Compared with 2013, only four brands increased total spending in 2016, including a five-fold increase in spending by Big G Cereals. Capri Sun, Lunchables, and Pebbles also increased advertising spending from 2013 to 2016. On the other hand, Lucky Charms, Betty Crocker Fruit Snacks, and Kool-Aid decreased their total spending by more than one-half during those three years.

The examination of advertising spending by less-advertised CFBAI listed brands, found that four companies had no advertising or spent less than \$30,000 on their listed brands, including Burger King, Campbell Soup Company, Kraft Heinz, and Post Foods. From 2007 to 2016, PepsiCo doubled spending on its less-advertised CFBAI listed brands, the only company to increase spending on these brands (See **Table 10**). In contrast, most companies dramatically reduced advertising for these brands from 2007 to 2016, including total reductions of

\$43 million by Kellogg, \$34 million in Kraft Heinz, \$29 million in General Mills, and \$22 million by ConAgra. Burger King had spent \$16 million to advertise its Kid's Meal in 2007, but did not advertise the product at all in 2016. Just two companies devoted less than 80% of their total advertising spending on these brands to English-language TV advertising. Kellogg and PepsiCo both spent over \$30 million on Spanish-language TV ads and over \$60 million on national magazine ads.

CFBAI top-50 non-listed brands

In contrast to declines in ad spending for most CFBAI listed brands, all _____ increased their total advertising spending from 2007 to 2016 (see **Table 11** and **Appendix Table A2**). Brands with the greatest total spending increases included Coca Cola, which spent an additional \$114 million (73% increase), Burger King spent almost \$90 million (+39%), Reese's Peanut Butter Cups spent almost \$83 million (more than a five-fold increase), and McDonald's spent over \$64 million (+9%). These brands also stood out for their high spending in other media. McDonald's spent the most in diverse other media, including \$59 million in Spanish-language TV advertising, \$83 million in outdoor advertising, \$68 million in radio advertising, and \$5 million in

Table 11. Advertising spending by CFBAI company top-50 non-listed brands in 2016

Company	Brand	Total ad spending (\$ mil)	TV % of total*	Change in total ad spending from 2007
McDonald's	All products (excluding Happy Meal)	\$765,548	72%	9%
Burger King	All products (excluding Kids Meal)	\$313,971	81%	39%
The Coca-Cola Company	Coca Cola	\$271,714	67%	73%
The Hershey Company	Hershey's	\$105,244	81%	98%
The Hershey Company	Reese's	\$102,274	81%	427%
General Mills	Yoplait	\$83,425	94%	206%
PepsiCo	Lays	\$66,582	57%	118%
The Hershey Company	Kit Kat	\$49,087	76%	3603%
Kellogg	Pop Tarts	\$38,346	77%	85%

*English-language TV advertising

Source: Rudd Center analysis of Nielsen data (2017)

national magazines. Coca Cola, Lays, Kit Kat, and Pop Tarts also spent \$3 million or more on Spanish-language TV ads. In addition, Coca Cola spent more than \$20 million on outdoor ads and \$19 million in radio, while Lays spent almost \$26 million in national magazine advertising.

Key findings

- CFBAI companies spent almost \$6 billion to advertise all their brands in 2016, but devoted just 12% (\$735 million) to advertise brands with products that may be featured in child-directed advertising (i.e., CFBAI listed brands).
- From 2007 to 2016, total advertising spending by the seven CFBAI companies that pledged to not engage in any child-directed advertising increased by 15%, while the remaining eleven CFBAI companies reduced their spending by 14%.
- Most CFBAI companies allocated 80% or more of their advertising spending to English-language TV advertising in 2016, although some brands spent \$50 million or more on Spanish-language TV advertising, outdoor advertising, radio, and/or national magazines.

TV advertising exposure

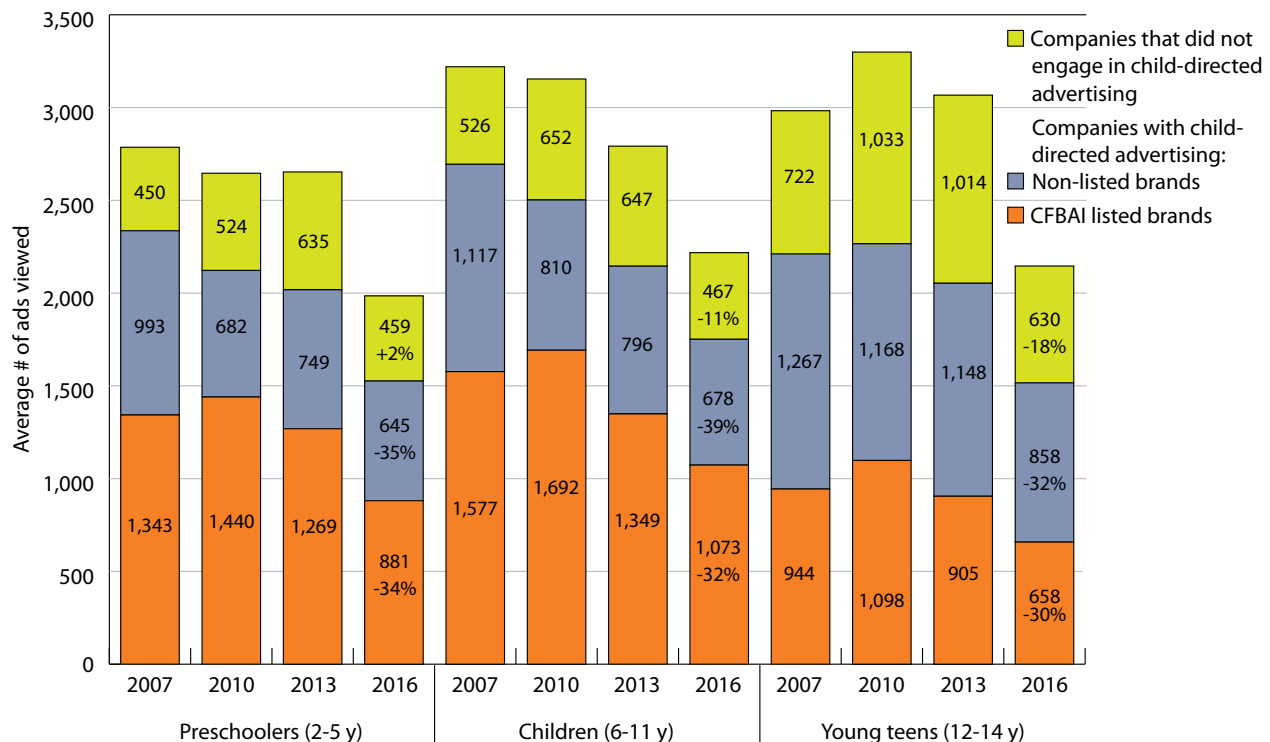
CFBAI companies were responsible for more than one-half of children's exposure to all food, beverage and restaurant TV advertising in 2016, resulting in on average 6.1 _____ per day from CFBAI companies for children (ages 6-11), 5.9

ads for young teens (ages 12-14), and 5.4 ads for preschoolers (ages 2-5). However, less than one-half of these ads promoted brands included on CFBAI company lists of products that may be in child-directed advertising (i.e., CFBAI listed brands) (see **Figure 12**). Notably, preschoolers and children saw over 450 ads annually for brands from CFBAI companies that pledged to not engage in any child-directed advertising, and over 600 ads for non-listed brands from CFBAI companies that did engage in child-directed advertising, but that did not include these brands in their lists of child-directed products. Furthermore, ten CFBAI companies (all companies with child-directed advertising, with the exception of McDonald's) have pledged not to advertise directly to children under age six. However, preschoolers saw 1,343 TV ads for brands from these companies in 2016—just 13% fewer ads than children (ages 6-11) viewed.

Compared to 2007, children and preschoolers saw approximately 25% fewer TV ads for all CFBAI company brands in 2016. However, changes in exposure differed by type of CFBAI company and brand. Exposure to TV ads for CFBAI listed brands and non-listed brands decreased by 30% or more for children in all age groups. However, TV ads viewed for CFBAI companies that pledged to not engage in child-directed advertising decreased at a somewhat lower rate, by 11% for children and 18% for young teens. In contrast, for preschoolers, ads viewed for these companies increased slightly from 2007 to 2016.

Despite high numbers of ads for _____ viewed by children under age 12, it appears that CFBAI companies have

Figure 12. Changes in TV ads viewed for CFBAI listed and non-listed brands



Source: Rudd Center analysis of Nielsen data (2017)

Table 12. TV ads viewed on all TV by age group for CFBAI company brands by type in 2016

	Preschoolers (2-5 y)		Children (6-11 y)		Young teens (12-14 y)	
	Tgt'd ratio vs. adults (18-49 y)	% ads viewed on children's TV	Tgt'd ratio vs. adults (18-49 y)	% ads viewed on children's TV	Tgt'd ratio vs. adults (18-49 y)	% ads viewed on children's TV
Companies with child-directed advertising:						
Listed brands	1.81	81%	2.21	82%	1.35	69%
Non-listed brands	0.43	2%	0.45	2%	0.57	1%
Companies that did not engage in child-directed advertising						
	0.42	0%	0.43	1%	0.57	0%

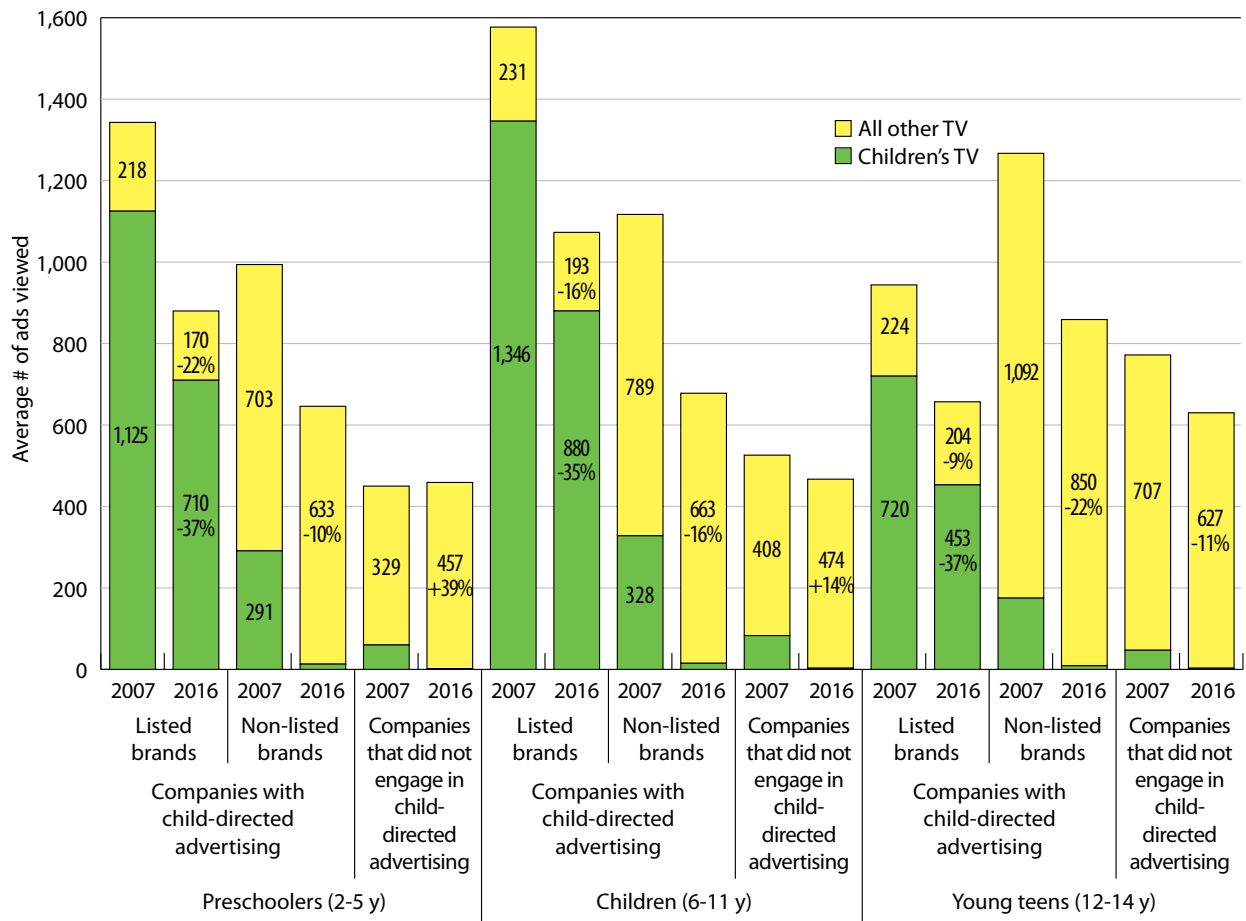
Source: Rudd Center analysis of Nielsen data (2017)

complied with their pledges to not advertise these brands in child-directed media (see **Table 12**). _____ for ads viewed by preschoolers and children versus adults for non-listed brands were approximately 0.4, which indicates that children saw 60% fewer ads for these brands than adults (ages 18-49) saw. Furthermore, 2% or less of the ads viewed by children for these brands appeared on _____ networks. On the other hand, targeted ratios for CFBAI listed brands ranged from 1.4 for young teens to 2.2 for children, indicating that these brands placed the majority of their advertisements during TV programming with larger audiences of children than of adults. Accordingly, more

than 80% of ads for _____ viewed by children under age 12 appeared on children's TV programming. These findings are consistent with CFBAI company pledges that they will only advertise listed brands on TV programming with an audience of 35% or more children under age 12.

On children's TV, nearly all ads from CFBAI companies viewed by children of all age groups were for CFBAI listed brands. This is a notable improvement from 2007 when approximately one-quarter of CFBAI company ads on children's TV were for CFBAI non-listed brands. It should be noted that these numbers reflect advertising on children's TV as defined by

Figure 13. Changes in ads viewed by CFBAI company type on children's TV vs. other TV



Source: Rudd Center analysis of Nielsen data (2017)

Nielsen, which may include some programming that did not meet the CFBAI threshold of 35% or more children under age 12 in the audience to qualify as child-directed. As noted earlier, TV ads for CFBAI companies appearing on children's TV decreased by approximately 50% from 2007 to 2016 for all child age groups. Children's exposure to TV ads for non-listed brands from companies with child-directed advertising also declined during this time on other types of TV (not children's TV) (see **Figure 13**). However, from 2007 to 2016, children's exposure to advertising on other TV for non-listed brands from CFBAI companies that pledged to not engage in child-directed advertising increased by 39% for preschoolers (ages 2-5) and 14% for children (ages 6-11).

CFBAI companies with the most TV advertising viewed by children

In 2016, children viewed 100 or more TV ads for brands from eight CFBAI participating companies (see **Table 13**). These companies represented approximately 90% of TV ads viewed by children from all CFBAI companies. General

Mills was responsible for the most TV advertising to children, contributing 12% of all food, beverage and restaurant ads viewed by children, and 11% and 8% for preschoolers and young teens, respectively. However, only General Mills, Kraft Heinz, and McDonald's averaged targeted ratios greater than 1.0 for all their brands combined, indicating that children saw more ads for their brands compared with adults. Children also viewed more than one-half of TV advertising for these three companies on children's TV. Kellogg brands averaged somewhat lower targeted ratios, while children viewed approximately 45% of ads for Kellogg brands on children's TV. For all other CFBAI companies, children under 12 viewed on average less than one-half the number of TV ads that adults viewed, and few of these ads appeared on children's TV.

Of the 11 CFBAI companies with child-directed brands, just 7 placed more than 15 ads per year (viewed by any child age group) on children's TV in 2016 (see **Table 14**). As on TV overall, General Mills advertised the most brands and placed the most advertising on children's TV, contributing 34% of CFBAI company ads viewed by children on children's TV. Not surprisingly, children in all age groups viewed approximately

Table 13. Total TV advertising viewed by children in 2016 by company*

Company	Preschoolers (2-5 y)				Children (6-11 y)				Young teens (12-14 y)			
	Avg # of ads viewed	Tgtd ratio vs adults (18-49 y)	% Change viewed on children's TV	% Change in ads viewed from 2007	Avg # of ads viewed	Tgtd ratio vs adults (18-49 y)	% Change viewed on children's TV	% Change in ads viewed from 2007	Avg # of ads viewed	Tgtd ratio vs adults (18-49 y)	% Change viewed on children's TV	% Change in ads viewed from 2007
General Mills	409.5	1.13	64%	-31%	468.4	1.29	65%	-32%	336.1	0.93	44%	-34%
The Kraft Heinz Company	242.7	1.17	67%	18%	311.6	1.50	73%	22%	216.6	1.04	56%	3%
PepsiCo	192.1	0.42	3%	7%	203.6	0.44	2%	-4%	275.8	0.60	1%	3%
McDonald's	183.4	1.38	74%	-23%	203.2	1.53	77%	-24%	134.0	1.01	59%	-39%
Kellogg Company	157.8	0.76	45%	-67%	184.0	0.89	46%	-65%	166.1	0.80	27%	-55%
The Hershey Company	157.3	0.42	0%	564%	156.7	0.42	0%	435%	219.0	0.59	0%	345%
Mars	100.0	0.39	0%	-20%	105.6	0.41	0%	-36%	154.6	0.61	0%	-45%
Burger King Corporation	93.6	0.40	0%	-31%	101.0	0.43	0%	-41%	139.1	0.59	0%	-13%

*Includes all CFBAI companies with 100 or more ads viewed by children in any age group in 2016

Source: Rudd Center analysis of Nielsen data (2017)

Table 14. TV advertising viewed on children's TV in 2016 by company*

Company	# of brands advertised on children's TV	Preschoolers (2-5 y)		Children (6-11 y)		Young teens (12-14 y)	
		Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)	Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)	Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)
General Mills	11	262.6	4.87	305.4	5.66	149.2	2.77
The Kraft Heinz Company	4	163.0	4.30	227.7	6.02	121.2	3.20
McDonald's	2	135.2	4.65	156.0	5.36	79.1	2.72
Kellogg Company	2	70.7	4.31	85.2	5.19	44.9	2.73
Post Foods	2	38.5	4.35	49.7	5.61	27.0	3.04
Campbell Soup Company	1	19.6	3.86	31.4	6.17	18.0	3.54
The Dannon Company	3	18.0	4.08	22.5	5.09	13.5	3.06

*Includes all companies with 20 or more ads viewed on children's TV by children in any age group

Source: Rudd Center analysis of Nielsen data (2017)

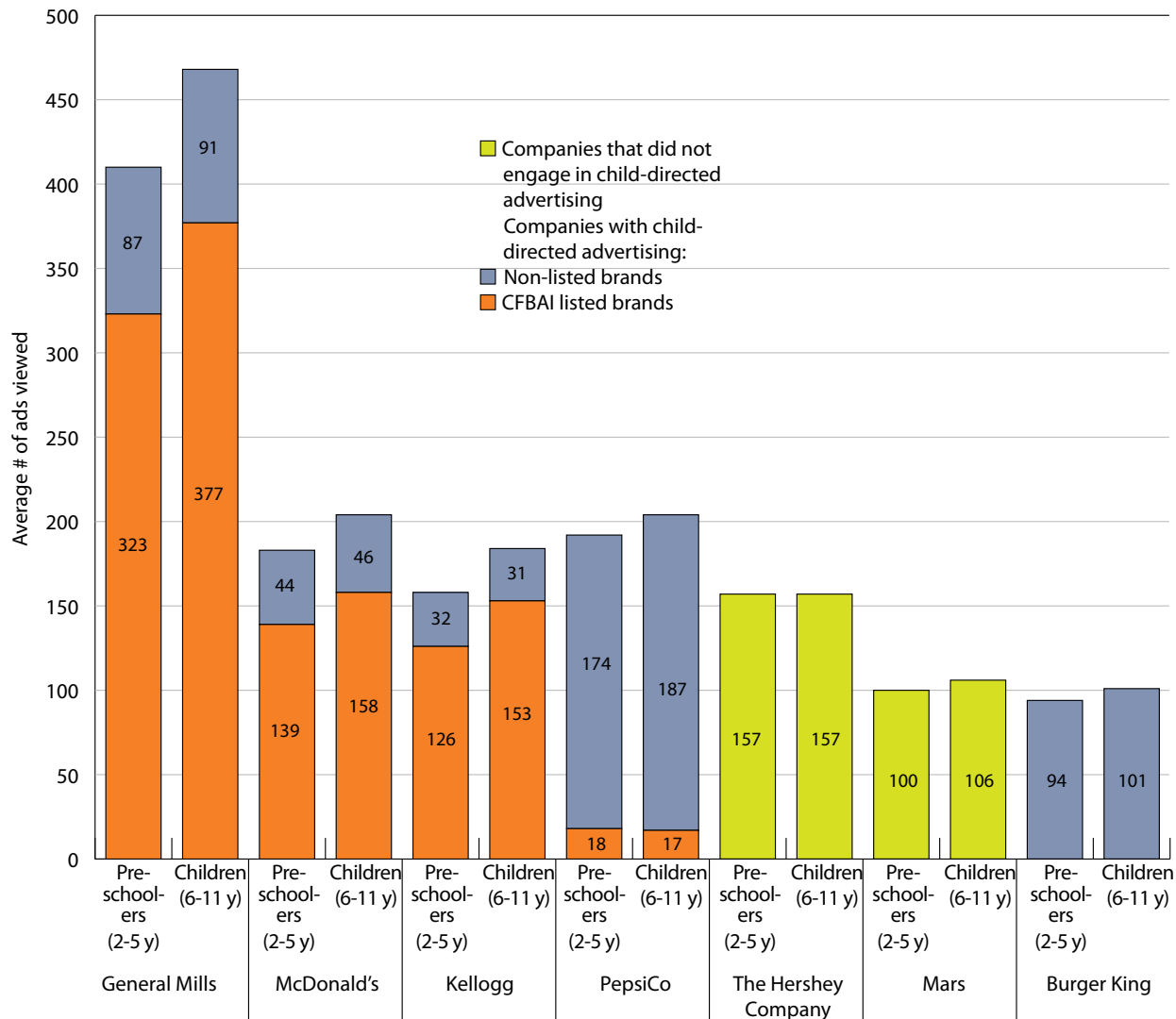
three to six times as many ads on children’s TV compared with adults. Four CFBAI companies listed brands that may be included in child-directed advertising, but placed little or no advertising for their brands on children’s TV in 2016: Burger King, ConAgra, PepsiCo, and Unilever.

General Mills, Kellogg, and McDonald’s were the only companies for which children viewed more ads for listed brands than for non-listed brands (see **Figure 14**). On the other hand, exposure to TV advertising for brands not listed for child-directed advertising represented at least 91% of all Burger King and PepsiCo ads viewed by children of all age groups. Notably, two companies that averaged 100 or more ads viewed by children had pledged that they would not direct any advertising to children under 12: The Hershey Company and Mars. However, low targeted ratios indicate that these companies did not specifically target children with their advertising, but that adults as well as children were exposed to frequent advertising for their brands.

Top-50 CFBAI listed brands

Sixteen CFBAI listed brands from six companies ranked among the top-50 brands advertised most to children on TV in 2016. Overall, children viewed the most TV ads for CFBAI top-50 listed brands (957 ads), followed by preschoolers (775 ads) and young teens (561 ads) (see **Appendix Table B1**). The average number of ads viewed by children for individual top-50 brands ranged from 26 ads for Cocoa Puffs to 158 ads for McDonald’s Happy Meals (see **Table 15**). Apart from Cheerios, children viewed more than 70% of TV advertising for these brands on children’s TV, with targeted ratios well above 1.0, indicating that advertising for these brands was primarily targeted to children (see **Appendix Table B2**). Notably, nearly 100% of TV advertising for brands with the highest targeted ratios (≥ 3.0) appeared on children’s programming. In contrast to the other brands on this list, less than 50% of TV advertising for Cheerios (including regular and Honey Nut varieties) appeared on children’s programming.

Figure 14. Total TV ads viewed by CFBAI company, brand type, and child age group in 2016



Source: Rudd Center analysis of Nielsen data (2017)

Table 15. Total TV ads viewed for top-50 CFBAI listed brands in 2016

Company	Brand	Preschoolers (2-5 y)				Children (6-11 y)				Young teens (12-14 y)			
		Avg # of TV ads viewed	Tgt'd ratio vs adults (18-49 y)	% Change viewed on children's TV	% Change in ads viewed from 2007	Avg # of TV ads viewed	Tgt'd ratio vs adults (18-49 y)	% Change viewed on children's TV	% Change in ads viewed from 2007	Avg # of TV ads viewed	Tgt'd ratio vs adults (18-49 y)	% Change viewed on children's TV	% Change in ads viewed from 2007
McDonald's	Happy Meal	139.0	4.41	95%	40%	157.6	5.00	96%	36%	79.9	2.53	97%	21%
The Kraft Heinz Company	Lunchables	68.1	3.08	88%	94%	96.8	4.38	88%	118%	57.8	2.61	80%	127%
General Mills	Big G Cereals	66.6	1.73	78%	212%	79.1	2.05	78%	235%	48.1	1.24	63%	187%
General Mills	Cinnamon/French Toast Crunch	51.8	2.26	84%	12%	61.4	2.67	84%	15%	37.3	1.63	68%	29%
General Mills	Cheerios	51.1	0.75	44%	-19%	59.3	0.87	47%	-19%	53.1	0.78	27%	-2%
The Kraft Heinz Company	Capri Sun	49.1	3.33	94%	57%	67.4	4.57	92%	71%	37.5	2.55	88%	42%
General Mills	Yoplait Go-Gurt	48.9	3.33	92%	2%	55.4	3.77	90%	0%	29.3	1.99	83%	-2%
Kellogg Company	Froot Loops	44.9	4.72	99%	14%	52.8	5.54	98%	18%	27.2	2.85	97%	15%
General Mills	Betty Crocker Fruit Snacks	40.2	4.08	95%	-44%	46.1	4.68	93%	-43%	23.9	2.43	84%	-45%
Post Foods	Fruity/Cocoa Pebbles	39.4	4.36	97%	-28%	50.5	5.60	98%	-30%	27.5	3.04	97%	-31%
General Mills	Lucky Charms	34.5	3.02	90%	-40%	42.0	3.67	89%	-37%	23.7	2.07	76%	-32%
Kellogg Company	Frosted Flakes	32.6	1.43	74%	-14%	40.4	1.77	74%	-1%	28.0	1.23	56%	28%
The Kraft Heinz Company	Kool-Aid	31.1	4.19	95%	-24%	42.6	5.74	95%	-22%	22.9	3.09	93%	-36%
The Kraft Heinz Company	Kraft Macaroni & Cheese	30.2	1.58	89%	-17%	42.0	2.19	94%	-13%	26.6	1.39	77%	-14%
Campbell Soup Company	Pepperidge Farm Goldfish	25.2	1.84	78%	-46%	37.6	2.74	83%	-31%	24.7	1.80	73%	-16%
General Mills	Cocoa Puffs	22.5	4.88	97%	32%	26.2	5.68	95%	27%	13.2	2.86	92%	20%

Source: Rudd Center analysis of Nielsen data (2017)

From 2007 to 2016, TV advertising viewed by children increased for approximately one-half of the brands on this list. Exposure to advertising for Big G Cereals and Lunchables increased at the highest rate. Children of all age groups viewed two to three times more TV ads for Big G Cereals, and approximately twice as many ads for Lunchables in 2016 than in 2007. Betty Crocker Fruit Snacks and Pepperidge Farm Goldfish had the largest declines in ad exposure. Ads for Betty Crocker Fruit Snacks were down by approximately 45% for children of all age groups. Exposure to Goldfish ads fell by 46% for preschoolers and by 31% and 16% for children and young teens, respectively.

Less-advertised CFBAI listed brands

Six companies also advertised listed brands that may be included in child-directed advertising, but that did not rank among the top-50 brands advertised most to children (see **Table 16**). CFBAI listed brands that did not advertise to children on TV at all in 2016

included Bolthouse Farms (Campbell Soup Company), Yoplait Trix and Kid Cup yogurts (General Mills), Kraft Polly-O and Singles cheese, Honey-Comb cereal (Post Foods), and Burger King Kid's Meal. Notably, children had viewed approximately 100 ads for Burger King Kid's Meal in 2007.

However, TV advertising for these brands in 2016 was low, totaling just 105 ads viewed by preschoolers and 116 ads by children for all brands combined (see **Appendix Table B1**). Among _____, Dannon advertised the most to children, totaling 56 ads viewed by preschoolers and 63 ads viewed by children for all its brands combined (no Dannon brands ranked among the top-50). With exception of PepsiCo Quaker brands, TV advertising for all other less-advertised brands that continued to advertise in 2016 decreased from 2007. Popsicle had the smallest decrease in ads viewed by preschoolers and children from 2007 to 2016 at -19% and -23%, respectively. Among these brands, only ConAgra Foods brands, General Mills kids' cereals, and

Table 16. Total TV ads viewed for less-advertised CFBAI listed brands in 2016

Company	Preschoolers (2-5 y)				Children (6-11 y)				Young teens (12-14 y)			
	Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)	% ads viewed on children's TV	Change in ads viewed from 2007	Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)	% ads viewed on children's TV	Change in ads viewed from 2007	Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)	% ads viewed on children's TV	Change in ads viewed from 2007
The Dannon Company	55.5	0.7	32%	-64%*	63.3	0.8	36%	-65%*	50.2	0.6	27%	-58%*
PepsiCo	18.0	0.4	0%	25%	17.1	0.4	0%	4%	18.4	0.4	0%	-13%
Kellogg Company	14.5	0.4	0%	-91%	14.3	0.4	0%	-92%	16.6	0.5	0%	-86%
General Mills	7.0	4.9	98%	-94%	7.7	5.4	96%	-95%	3.7	2.6	93%	-95%
Unilever	6.8	5.4	94%	-19%	7.7	6.1	84%	-23%	3.8	3.0	76%	-32%
ConAgra Foods	3.4	3.8	88%	-95%	6.0	6.7	92%	-92%	4.1	4.6	93%	-90%

*Company had not joined CFBAI

Source: Rudd Center analysis of Nielsen data (2017)

Popsicles (Unilever) appeared to primarily target advertising to children, with targeted ratios of 2.8 or higher.

CFBAI company non-listed top-50 brands

In addition to 16 listed brands, nine brands that companies did not include on their lists of products that may be in child-directed advertising also ranked among the top-50 brands

with the most TV advertising to children (see **Table 17** and **Appendix Table B3**). Four of these brands were from three CFBAI companies that pledged to not engage in any child-directed advertising (Hershey Company, Coca-Cola, and Mars). The remaining brands were from five CFBAI companies that engaged in child-directed advertising but did not include these brand(s) in their lists of child-directed products (Burger King, McDonald's, General Mills, PepsiCo, and Kellogg).

Table 17. Total TV ads viewed for CFBAI company top-50 non-listed brands in 2016

Company	Brands	Preschoolers (2-5 y)				Children (6-11 y)				Young teens (12-14 y)			
		Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)	% ads viewed on children's TV	Change in ads viewed from 2007	Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)	% ads viewed on children's TV	Change in ads viewed from 2007	Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)	% ads viewed on children's TV	Change in ads viewed from 2007
Companies with child-directed advertising:													
Burger King Corporation	All products (excluding Kids Meal)	93.6	0.40	0%	101%	101.0	0.43	0%	65%	139.1	0.59	0%	38%
McDonald's	All products (excluding Happy Meal)	44.4	0.44	8%	-68%	45.6	0.45	9%	-70%	54.2	0.53	4%	-65%
Kellogg Company	Pop Tarts	23.8	0.56	6%	-69%	31.8	0.75	8%	-64%	40.6	0.96	5%	-12%
General Mills	Yoplait Yogurt	23.6	0.46	2%	304%	25.1	0.49	2%	186%	30.1	0.59	1%	115%
PepsiCo	Lays Potato Chips	19.2	0.43	0%	386%	20.3	0.45	0%	254%	27.5	0.61	0%	292%
Companies that did not engage in child-directed advertising:													
The Hershey Company	Hershey's	39.4	0.43	0%	258%	38.3	0.42	0%	174%	50.9	0.56	0%	140%
The Hershey Company	Reese's	32.1	0.41	0%	348%	33.2	0.43	0%	273%	45.9	0.59	0%	200%
The Hershey Company	Kit Kat	20.2	0.41	0%	**	20.5	0.42	0%	**	29.2	0.60	0%	**
The Coca-Cola Company	Coca Cola	19.7	0.49	2%	183%	22.3	0.56	4%	179%	27.6	0.69	2%	190%

**No TV advertising in 2007

Source: Rudd Center analysis of Nielsen data (2017)

Children of all age groups saw more than 90 ads in 2016 for Burger King products (not its Kid's Meal) and 44 or more McDonald's (not Happy Meals) ads in 2016 (see **Table 17**). For the other brands on this list, preschoolers and children saw 19 to 39 ads. In contrast to CFBAI listed brands, young teens saw more ads for top-50 non-listed brands than did younger children—young teens saw 445 ads, while preschoolers saw 316 ads, and children saw 338 ads. With young teen to adult targeted ratios of 1.0, it appears that Kellogg targeted PopTarts ads to this age group. In contrast, young teen to adult targeted ratios of 0.5 to 0.7 for all other brands indicate that young teens saw 30-50% fewer ads for the brands versus adults, which was comparable to differences in TV viewing time for young teens versus adults.

In contrast to reductions in TV advertising for most CFBAI listed brands, advertising for the majority of _____ increased from 2007 to 2016. Preschoolers experienced the largest increases, including more than four-fold increases in exposure to advertising for Yoplait Yogurt and Lays. On the other hand, exposure to TV ads for McDonald's brands (excluding Happy Meals) decreased by more than 50% for children of all age groups, and TV advertising for Pop Tarts was down by more than two-thirds for preschoolers and children, and 12% for young teens.

The top-50 brands from CFBAI companies that pledged to not engage in child-directed advertising included three Hershey candy brands and one soda brand (Coca-Cola). From 2007 to 2016, exposure to TV advertising for Hershey's Candy and Reese's more than doubled across all ages, while Kit Kat had no TV advertising in 2007. TV ads for Coca Cola nearly tripled during this time for children of all age groups.

Among the CFBAI top-50 non-listed brands, children saw some ads for PopTarts, McDonalds (not Happy Meals), Yoplait yogurt, and Coca-Cola on children's TV programming (see **Appendix Table B4**). Presumably, these ads were not placed on TV programming with a child audience greater than 35% and these companies complied with their CFBAI pledges to not advertise in child-directed media according to their definition. Nevertheless, placement on children's TV programming indicates that these brands were not targeting adults with their advertising.

Key findings

- CFBAI listed brands appeared to be the only CFBAI brands with advertising directly targeted to children, evidenced by advertising on children's TV programming and high child to adult targeted ratios (i.e., average number of ads viewed by children vs. adults).
- Of the 47 CFBAI listed brands in 2016, just 16 were responsible for almost 90% of all TV ads for CFBAI listed brands viewed by preschoolers and children. The remaining brands that were included on CFBAI company lists of products that may be in child-directed advertising had little or no advertising to children in 2016. General Mills, McDonald's, and Kellogg had the most TV advertising to preschoolers and children for listed brands (averaging more than 100 ads viewed each).
- However, approximately one-third of all TV ads for CFBAI company brands viewed by preschoolers (33%) and children (31%) were for non-listed brands that companies did not include on lists of products that may be featured in child-directed advertising. Advertising for many of these brands appeared to be primarily targeted to teens and/or adults, nevertheless children under 12 also viewed large numbers of these ads. For example, children and preschoolers viewed 187 and 174 TV ads, respectively, for PepsiCo non-listed brands. They also viewed 91 and 87 ads for General Mills non-listed brands and approximately 100 ads for Burger King products (not Kid's Meals).
- Since 2007, TV advertising viewed by children under 12 for CFBAI listed and non-listed brands from the 11 CFBAI companies that directed advertising for some of their brands to children declined by approximately one-third. The number of ads for CFBAI brands viewed by children on children's TV declined at even higher rates (approximately 50% for all child age groups).
- Additionally, exposure to advertising on children's TV programming for non-listed brands from companies that have pledged to not direct any advertising to children, decreased by nearly 100% for children of all ages from 2007 to 2016.

Banner advertising on kids' websites and social media sites

We examined syndicated data from comScore to measure _____ placed on _____ by CFBAI companies in 2016, including on _____ (e.g., CartoonNetwork.com) and two _____ (Facebook and YouTube). We used comScore's definitions to identify kids' websites (Family & Youth – Kids). comScore defined kids' websites as sites where 70% of the content was for kids.

Although comScore does not report the age of individuals who viewed banner ads placed on kids' websites, an analysis of the content and age of visitors to the kids' sites where CFBAI companies placed ads most often confirms that they were directed to children (see **Table 18**). More than 60% of banner ads placed by CFBAI companies on kids' websites appeared on these 10 sites. The proportion of visitors to these sites who were children (ages 2-12) all exceeded the 10% of visitors to all internet sites who were children. Despite their child-directed content, child visitors to five of the ten sites did not exceed the threshold established by the CFBAI to identify child-directed websites (i.e., $\geq 35\%$ of visitors aged 2 to 11). Of note, comScore defines children as ages 2 to 12 and does not report ages 2 to 11 as a separate age group. Therefore, it is not possible to independently confirm the CFBAI definition of child-directed websites.

Table 18. Kids' websites with the most banner ads for CFBAI brands* in 2016

Kids' website	# of food-related banner ad impressions on the site (000)	% of visitors to the site who were children (2-12 years)	Site content
Roblox.com	192,708	17%	Games for kids
PopTropica.com	33,611	42%	Educational games for kids
ABCYA.com	21,121	**	Educational games for kids
CartoonNetwork.com	13,038	48%	Games, videos, and full episodes for kids
Nick.com	9,952	45%	Games, videos, and full episodes for kids
GirlsGoGames.com	8,868	45%	Games for kids
AGame.com	6,425	28%	Games for kids
FunBrain.com	4,627	39%	Educational games for kids
GamesGames.com	2,748	15%	Games for kids
Disney Online sites	2,637	20%	Games, videos, Disney merchandise for kids

*Includes ads placed by CFBAI brands with 5 million or more banner ads on kids' websites in 2016 (Lunchables, Capri Sun, Froot Loops, Kool-Aid, Post Cereals, and McDonald's Happy Meal)

**comScore did not report number of visitors

Bold indicates that the proportion of child visitors to the website exceeded 35% and qualified as child-directed according to the CFBAI

Sources: comScore Ad Metrix Advertiser report and comScore Media Metrix Key Measures report for children (January - December 2016)

CFBAI companies

Sixteen of the eighteen companies participating in the CFBAI placed a total of _____ on kids' websites in 2016 (see **Table 19**). Only Burger King and American Licorice Company did not advertise on kids' websites. Nine out of ten banner ads for CFBAI brands on kids' websites were placed by either Kraft Heinz (77%) or Kellogg (13%), primarily for CFBAI listed brands. McDonald's, ConAgra, PepsiCo, and Unilever also placed ads for CFBAI listed brands on kids' websites, but these companies placed more ads for CFBAI non-listed brands than for listed brands. Notably, Nestle USA, Coca-Cola, PepsiCo, and Kellogg Company each placed over 18 million ads for CFBAI non-listed brands on kids' websites in 2016, while only Post Foods and Dannon did not place any banner ads for non-listed brands on kids' websites.

A total of 126 CFBAI brands placed banner ads on kids' websites in 2016 (see **Table 20**). Twenty-two CFBAI listed brands, those with products that may be in child-directed advertising, placed 70% of these ads. In addition, 9% of all banner ads for CFBAI listed brands appeared on kids' websites, almost twice as many banner ads than appeared on social media sites (Facebook and YouTube). CFBAI company non-listed brands also placed 143 million banner ads on kids' websites, with a majority of these ads placed by companies with child-directed advertising, however these ads represented just 1% of all banner ads placed by those brands. In contrast, these companies placed almost 3 billion ads on Facebook and YouTube in 2016, 13% of all banner ads placed by these brands.

Table 19. Total banner ads placed by CFBAI companies on kids' websites in 2016

Company	# of banner ad impressions (000)	
	CFBAI listed brands	Non-listed brands
The Kraft Heinz Company	254,193	10,256
Kellogg Company	42,549	18,177
PepsiCo	2,031	16,527
McDonald's	5,526	10,841
General Mills	10,382	4,021
ConAgra Foods	1,460	12,065
Post Foods	13,287	0
Unilever	101	3,575
The Dannon Company	1,094	0
CFBAI companies that did not engage in child-directed advertising:		
Nestle USA	n/a	31,280
The Coca-Cola Company	n/a	25,253
Mars	n/a	9,850
The Hershey Company	n/a	396
Ferrero USA	n/a	290
Mondelez Global	n/a	253

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Table 20. Banner ads placed by CFBAI company brands on kids' websites and social media sites in 2016

	Brands with advertising on kids' websites		Kids' websites		Social media sites*	
	# of brands	% of total brands	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
CFBAI companies with child-directed advertising						
CFBAI listed brands	22	47%	330,622	9%	185,387	5%
Non-listed brands	62	n/a	75,462	0%	2,193,654	14%
Companies that did not engage in child-directed advertising	42	n/a	67,322	1%	493,766	10%

*Facebook and YouTube

Source: comScore Ad Metrix Advertiser report (January - December 2016)

CFBAI listed brands

Twenty-two of the 47 _____ placed banner ads on third-party kids' websites in 2016. Fifteen of these brands placed over 1 million ads on kids' sites (see **Table 21**). Not surprisingly, top-50 CFBAI listed brands advertised more often on kids' websites (totaling 325 million ads) compared to less-advertised CFBAI listed brands (5 million ads).

Ads for Lunchables appeared on kids' sites more often than ads for any other CFBAI brand. Two additional Kraft Heinz brands, Capri Sun and Kool-Aid, ranked second and fourth in number of ads placed on kids' websites. Froot Loops (Kellogg Company)

ranked third with 37.7 million ads on kids' websites in 2016. The brands placing the highest proportion of their banner ads on kids' websites included Kid Cuisine and Go-Gurt, which placed more than 70% of their ads on these sites, while Kool-Aid and Cinnamon Toast Crunch placed approximately one-half.

In addition to ads on kids' websites, Lunchables also placed by far the most ads on social media sites (11% of all its ads), including over 80 million ads on YouTube. One-quarter of Go-Gurt ads appeared on YouTube, while 13% of Cinnamon Toast Crunch ads appeared on the two social media sites. Quaker placed the most ads on Facebook, but they represented less than 7% of all banner ads for this brand in 2016.

Table 21. Banner ads placed by CFBAI listed brands* on kids' and social media websites in 2016

Company	Brand*	Top-50 brand	Kids' websites		Social media sites		
			# of ad impressions (000)	% of total brand impressions	# of ad impressions on Facebook (000)	# of ad impressions on YouTube (000)	% of total brand impressions***
The Kraft Heinz Company	Lunchables (excluding Uploaded varieties)	✓	165,871	24%	8,207	81,038	11%
The Kraft Heinz Company	CapriSun (including Roarin' Waters)	✓	67,770	16%	9,431	1,530	3%
Kellogg Company	Froot Loops	✓	37,659	39%	1,076	719	2%
The Kraft Heinz Company	Kool-Aid	✓	18,142	50%	319	277	2%
Post Foods	Post Cereals **	✓	13,287	26%	1,263	1,849	6%
McDonald's	Happy Meal	✓	5,526	40%	227	307	4%
Kellogg Company	Frosted Flakes	✓	4,068	6%	587	70	1%
General Mills	Cinnamon Toast Crunch	✓	3,335	46%	338	584	13%
General Mills	Lucky Charms	✓	2,968	5%	2,504	511	5%
General Mills	Cheerios	✓	2,623	3%	3,576	2,339	6%
The Kraft Heinz Company	Kraft Macaroni & Cheese	✓	2,031	1%	4,663	686	2%
PepsiCo	Quaker		2,031	0%	31,314	2,509	7%
ConAgra Foods	Kid Cuisine		1,460	77%	0	0	0%
General Mills	Go-Gurt	✓	1,331	71%	0	492	26%
The Dannon Company	Dannon, Activia, Light & Fit		1,094	2%	1,458	2,780	7%

*Includes brands with 1,000,000 or more banner ads on kids' websites in 2016.

**comScore did not specify a brand, but these ads may have promoted the company's CFBAI listed brands.

*** Facebook and YouTube

Source: comScore Ad Metrix Advertiser report (January - December 2016)

CFBAI non-listed brands

Of the 104 CFBAI _____ that placed any banner ads on kids' websites in 2016, 34 brands placed more than 1 million ads on these websites, but just four of these brands ranked among the 50 brands advertised most to children on TV (see **Table 22**). Nestle Waters ranked first with 26 million ads on kids' websites. McDonald's (excluding Happy Meal ads) and Coca-Cola each placed almost 11 million banner ads on kids' websites. PepsiCo non-listed brands with more than 2 million banner ads each on kids' websites included Frito-Lay snacks (such as Funyuns, Tostitos, Cheetos, and Ruffles), Gatorade,

Lays, and Mountain Dew. Notably, Lunchables also placed almost 8 million ads on kids' websites for its Uploaded varieties, which did not meet CFBAI nutrition standards for foods that may be advertised in child-directed media (in addition to the ads reported earlier for Lunchables products that did meet the standards). Although the number of ads was relatively low (1.3 million), 85% of ads for Krave cereal were placed on kids' websites, more than any other CFBAI brand in our analysis (including those that may be advertised in child-directed media).

In addition to banner ads on kids' websites, Frito Lay Snacks also placed 1.1 billion ads on Facebook.com in 2016, one-

Table 22. Banner ads placed by CFBAI non-listed brands* on kids' and social media websites in 2016

Company	Brand	Top-50 brand	Kids' websites		Social media sites		
			# of ad impressions (000)	% of total brand impressions	# of ad impressions on Facebook (000)	# of ad impressions on YouTube (000)	% of total brand impressions**
Nestle USA	Nestlé Waters		25,968	4%	64,909	6,195	11%
McDonald's	All products (excluding Happy Meal)	✓	10,841	1%	56,263	6,973	12%
The Coca-Cola Company	Coca-Cola	✓	10,633	2%	57,414	7,178	11%
The Kraft Heinz Company	Lunchables Uploaded		7,881	7%	1,301	20,444	20%
Kellogg Company	Special K		6,119	1%	14,152	1,872	3%
PepsiCo	Frito-Lay (excluding Lays)		4,893	0%	1,084,014	9,328	51%
The Coca-Cola Company	Fanta		4,197	4%	6,220	1,931	7%
Kellogg Company	Pringles		3,515	1%	3,894	594	2%
Kellogg Company	Cheez-It		3,426	1%	11,370	1,383	4%
PepsiCo	Gatorade		3,198	1%	8,464	1,131	4%
ConAgra Foods	Healthy Choice		3,123	4%	5,543	1,009	8%
The Coca-Cola Company	Dasani		2,713	3%	9,096	1,047	11%
Mars	Wrigley		2,567	0%	29,664	6,866	5%
Kellogg Company	Kellogg's Raisin Bran		2,558	2%	2,012	175	2%
Nestle USA	Nestea		2,284	9%	1,554	225	7%
Mars	Snickers		2,241	2%	6,038	1,037	5%
PepsiCo	Lays	✓	2,226	0%	310,970	1,239	52%
PepsiCo	Mountain Dew		2,213	2%	6,362	2,219	7%
ConAgra Foods	Hebrew National		2,188	2%	3,856	929	3%
ConAgra Foods	Snack Pack		2,099	2%	7,406	1,521	8%
Mars	CocoaVia		1,905	2%	5,620	4,613	11%
Unilever	Ragu		1,701	2%	19,095	274	23%
Nestle USA	Nespresso		1,640	0%	132,858	1,776	35%
General Mills	Yoplait	✓	1,562	2%	2,487	656	4%
ConAgra Foods	Reddi Wip		1,557	1%	24,010	1,027	12%
ConAgra Foods	Banquet Frozen Meals		1,543	1%	5,596	1,337	4%
The Coca-Cola Company	Diet Coke		1,434	3%	1,431	333	4%
The Coca-Cola Company	Glaceau		1,390	1%	3,097	1,218	2%
Kellogg Company	Krave		1,343	85%	0	0	0%
The Coca-Cola Company	Mello Yello		1,340	6%	1,015	306	6%
The Coca-Cola Company	Diet Coke Lime		1,337	6%	1,005	301	6%
Mars	Starburst		1,270	1%	8,734	814	8%
PepsiCo	Naked Juice		1,257	1%	7,278	1,032	3%
Unilever	Lipton		1,058	1%	3,258	5,335	10%

*Includes brands with 1,000,000 or more banner ads on kids' websites in 2016

**Facebook and YouTube

Source: comScore Ad Metrix Advertiser report (January - December 2016)

half of all its banner ads and more than any other brand in our analysis. Similarly, Lays, a top-50 Frito-Lay brand placed more than half of its ads on Facebook, totaling 311 million. Two additional brands that ranked among the top-50 brands advertised most to children on TV also placed more than 10% of their ads on social media sites: McDonald's (excluding Happy Meals) and Coca-Cola placed over 50 million ads each on Facebook. In addition, Lunchables Uploaded placed 20 million ads on YouTube, 20% of banner ads for the brand.

Key findings

- The majority of banner ads placed by CFBAI companies on kids' websites (identified by comScore due to their primarily child-directed content) appeared on ten sites. Children (ages 2-12) were more likely to visit these sites than were adults, although just five of the ten would qualify as child-directed according to the CFBAI definition (i.e., ≥35% child audience).
- Nearly all CFBAI companies placed banner ads on kids' websites in 2016, but Kraft Heinz placed more than all other CFBAI companies combined totaling 253 million ads for four brands (53% of ads placed by CFBAI companies). Lunchables, Capri Sun, Kool-Aid, and Kraft Macaroni & Cheese.
- Seventy percent of banner ads on kids' websites promoted CFBAI listed brands, and these brands tended to place a relatively high proportion of all their ads on kids' websites. CFBAI listed brands also tended to place more banner ads on kids' websites than on social media sites, although a few brands (Lunchables, Cinnamon Toast Crunch, and Go-Gurt) also placed 10% or more of their ads on Facebook and/or YouTube.

- The majority of CFBAI companies also placed banner ads for non-listed brands on kids' websites, including more than 25 million ads for Nestle and Coca-Cola brands (two companies that pledged to not engage in child-directed advertising). Although all kids' websites did not meet the CFBAI definition of child-directed media, the majority of the content on these sites was designed to appeal to children.
- CFBAI non-listed brands placed a higher proportion of their ads on social media websites. Frito-Lay brands (including Lays) placed more than 1.4 billion ads on Facebook in 2016.

Food company websites

Fifteen of the eighteen companies participating in CFBAI had _____ with enough child _____ on the comScore panel in 2016 to measure.⁷ Visitors to American Licorice Company, Ferrero USA, and Post Foods websites were not available.

The total number of child (ages 2-12) and teen (ages 13-17) visitors to all websites from CFBAI companies varied widely (see **Table 23**). McDonald's websites had by far the most unique child visitors, averaging 168,000 per month, followed by General Mills with 86,000. Although Kraft Heinz ranked third with 54,000 unique child visitors monthly, the company's sites attracted the highest _____, who represented 15% of all visitors to its sites. Dannon was the only other company with websites that attracted a higher proportion of children than did the internet overall (13% of visitors to Dannon sites were children versus 10% of visitors to all internet sites). However, the total number of children visiting Dannon sites was relatively low. Three companies that pledged to not engage in advertising to children attracted more than 34,000

Table 23. Unique visitors to all websites for CFBAI companies in 2016

Company	Avg monthly unique visitors (000)		% of total unique visitors	
	Children (2-12 y)	Teens (13-17 y)	Children (2-12 y)	Teens (13-17 y)
McDonald's	167.9	182.5	7%	8%
General Mills	85.7	111.7	2%	3%
The Kraft Heinz Company	54.1	20.1	15%	5%
PepsiCo	46.9	44.9	5%	5%
Nestle USA	43.1	51.7	3%	3%
Unilever	42.4	50.6	4%	5%
The Coca-Cola Company	39.2	39.4	4%	4%
Mars	34.2	38.6	5%	6%
Kellogg Company	32.7	35.8	4%	5%
Burger King Corporation	21.4	31.3	6%	9%
The Dannon Company	14.8	8	13%	7%
ConAgra Foods	14.8	18.7	3%	4%
Campbell Soup Company	4.7	5.3	2%	2%
The Hershey Company	3.7	13.6	2%	6%
Mondelez Global	2.5	7.7	1%	3%

Bold indicates that a higher proportion of visitors to the company's sites were children or teens compared to visitors to the internet in total. For the internet overall in 2016, 10% of visitors were 2-12 years old and 7% were 13-17 years old.

Source: comScore Media Metrix Key Measures report for children and teens (January - December 2016)

Table 24. Youth visitors to CFBAI company websites by brand type in 2016

	# of websites	% of total	Avg monthly unique visitors (000)				Avg % of total unique visitors	
			Children (2-12 y)		Teens (13-17 y)		Children (2-12 y)	Teens (13-17 y)
			Median	(Range)	Median	(Range)		
CFBAI companies with child-directed advertising:								
CFBAI listed brands	17	36%	1.5	(0.1-62.3)	1.1	(0.2-20.8)	19%	8%
Non-listed brands	73	n/a	0.7	(<0.1-85.8)	1.2	(<0.1-125.5)	4%	5%
Companies that did not engage in child-directed advertising								
	62	n/a	0.3	(<0.1-13.1)	0.9	(<0.1-13.6)	5%	7%

Source: comScore Media Metrix Key Measures report for children and teens (January - December 2016)

children to their websites per month: Nestle, The Coca-Cola Company, and Mars.

More teens than children visited websites for the majority of CFBAI companies in 2016, with a few exceptions. Websites from Kraft Heinz, PepsiCo, and Dannon attracted more children, while equal numbers of children and teens visited Coca-Cola's sites. The two fast food restaurants in the CFBAI had the highest proportions of teen visitors to any CFBAI company's websites. McDonald's sites attracted 182,500 teens (13-17y) per month in 2016, where they represented 8% of visitors. Burger King attracted just 31,300 teens monthly, but teens represented 9% of visitors to these sites. These proportions were somewhat higher than the proportion of teen visitors to the internet overall (7%).

The analysis of individual websites from CFBAI companies found 152 different websites that were visited by enough children (ages 2-12) in 2016 to measure in comScore (see **Table 24**). However, just over one-third of the CFBAI listed brands attracted enough children to their websites to be measured in comScore. The median number of unique child visitors to these sites per month was just 1,500. In contrast, more than 100 non-listed brands from CFBAI companies maintained websites with enough child visitors to measure in comScore. However, 54% of these websites were from companies with child-directed

advertising and 46% were from companies that did not engage in child-directed advertising resulting in a median of just 400 child visitors per month for all non-listed brands.

Although the numbers of children visiting CFBAI company websites tended to be small, children represented a higher than average proportion of visitors to websites for CFBAI listed brands. Children under age 13 represented 10% of all visitors to the internet in total in 2016, but 19% of visitors to these sites. In addition, on average more than twice as many children visited websites for CFBAI company listed brands than teens. In contrast, websites for non-listed brands tended to be visited by more teens than children. However, for both types of CFBAI brands, proportions of teen visitors to their sites were comparable to teen visitors to the internet in total (where teens represented 7% of all unique visitors).

CFBAI listed brands

Six of the sites for _____ were for brands that ranked among the top-50 brands advertised most to children (see **Table 25**). Another 11 less-advertised CFBAI listed brands also had websites with enough child visitors to measure in comScore, but just four of these sites averaged more than 1,000 child visitors per month. Additional sites with

Table 25. Youth visitors to individual websites for CFBAI listed brands* in 2016

Company	Website	Top-50 brand	Avg monthly unique visitors (000)		% of total unique visitors	
			Children (2-12 y)	Teens (13-17 y)	Children (2-12 y)	Teens (13-17 y)
McDonald's	HappyMeal.com	✓	62.3	20.8	43%	15%
The Kraft Heinz Company	Lunchables	✓	44.1	9.6	78%	17%
The Dannon Company	Activia.com		11.6	5.4	28%	13%
Kellogg Company	FrootLoops.com	✓	9.2	5.3	22%	13%
General Mills	LuckyCharms.com	✓	5.9	2.2	58%	21%
Kellogg Company	LeggoMyEggo.com		3.2	0.9	12%	4%
The Dannon Company	Danimals.com		2.2	1.1	18%	9%
General Mills	Cheerios.com	✓	1.8	3.5	4%	7%
General Mills	GoGurt.com	✓	1.4	0.7	45%	22%
PepsiCo	QuakerOats.com		1.2	2.9	1%	3%

*Includes websites from CFBAI listed brands that averaged more than 1,000 unique child visitors per month in 2016.

Bold indicates that a higher proportion of visitors to the site were children or teens compared to visitors to the internet in total.

Source: comScore Media Metrix Key Measures report for children and teens (January - December 2016)

fewer than 1,000 child visitors (not listed in the table) included RiceKrispies.com and FrostedMini-Wheats.com (Kellogg), OikosYogurt.com and LightAndFit.com (Dannon), Popsicle.com (Unilever), and ChefBoyardee.com (ConAgra).

Except for Cheerios.com and QuakerOats.com, websites for CFBAI listed brands were relatively more popular with children under 13, who represented between 12% and 78% of visitors to the sites. However, just four of the sites met the 35% child audience threshold to qualify as child-directed according to the CFBAI.⁸ Lunchables had the highest proportion of child visitors at 78%, while just 5% of visitors to the site were 18 years or older. However, the number of visitors to most of these sites was low, with only HappyMeal.com and Lunchables attracting more than 12,000 child visitors per month in 2016.

CFBAI non-listed brands

In 2016, an additional 135 brands that were not included on CFBAI company lists of products that may be advertised to children maintained websites with enough child visitors to report in comScore. Twenty-two of these sites averaged more than 1,000 child visitors monthly or had audience shares that exceeded the share of child and teen visitors to the total

internet in 2016 (see **Table 26**). Websites on this list include nine sites from four sugary drink brands (Coca Cola, Pepsi, Mountain Dew, and Powerade), three candy brand sites (Hershey's, M&Ms, and Skittles), and three snack brands (Pop Tarts, FritoLay, and Doritos), while just one promoted a brand in a healthy food category (Planters.com).

McDonalds.com attracted 86,000 children monthly, more than any other CFBAI brand website in this analysis, including sites for child-directed brands. Notably, more children visited McDonalds.com than visited HappyMeal.com in 2016. Three Coca-Cola sites (Coca-Cola.com, Coca-ColaStore.com, and MyCokeRewards.com) and Pillsbury.com (General Mills) also averaged more than 10,000 unique child visitors monthly. Five sites on this list attracted a disproportionately high share of child visitors. Although none of the sites reached the 35% child audience threshold set by CFBAI companies to qualify as child-directed, MuellersPasta.com and CocaColaStore.com had child audience shares of 33% and 30%, respectively. In addition, 10 of the 22 sites had teen (ages 13-17) audience shares that exceeded teens' share of visitors to the total internet. The sites attracting the highest shares of total youth (under age 18) included MuellersPasta.com (51%), Coca-ColaStore.com (39%), and 5Gum.com (39%).

Table 26. Youth visitors to individual websites for CFBAI non-listed brands* in 2016

Company	Website	Top-50 brand	Avg monthly unique visitors (000)		% of total unique visitors	
			Children (2-12 y)	Teens (13-17 y)	Children (2-12 y)	Teens (13-17 y)
McDonald's	McDonalds.com	✓	85.8	125.5	6%	9%
General Mills	Pillsbury.com		28.6	23.6	2%	2%
The Coca-Cola Company	Coca-Cola.com	✓	13.1	9.7	13%	9%
The Coca-Cola Company	Coca-ColaStore.com	✓	12.7	3.8	30%	9%
The Coca-Cola Company	MyCokeRewards.com	✓	11.5	13.6	2%	2%
PepsiCo	Pepsi.com		8.3	7.4	7%	7%
The Coca-Cola Company	Coca-ColaCompany.com	✓	8.2	6.5	5%	4%
PepsiCo	Fritolay.com		6.1	6.4	5%	5%
PepsiCo	MountainDew.com		4.6	9.3	5%	11%
PepsiCo	PepsiCo.com		4.1	3.9	3%	3%
The Hershey Company	Hersheys.com	✓	3.9	13.5	2%	6%
Mars	MyMMS.com		3.5	3.0	4%	3%
ConAgra Foods	MuellersPasta.com		3.2	1.8	33%	18%
PepsiCo	Doritos.com		3.1	2.2	9%	6%
Mars	5Gum.com		3.0	2.6	21%	18%
Mars	MMS.com		2.9	4.3	4%	6%
PepsiCo	MyPepsiCo.com		2.4	1.1	3%	1%
ConAgra Foods	Orville.com		1.8	0.8	15%	7%
The Coca-Cola Company	Powerade.com		1.8	1.6	10%	9%
The Kraft Heinz Company	Planters.com		1.6	5.4	3%	10%
Kellogg Company	PopTarts.com	✓	1.4	2.3	6%	10%
Mars	Skittles.com		1.0	1.3	9%	12%

*Includes websites from CFBAI top-50 brands that averaged more than 1,000 unique child visitors per month in 2016. Includes websites for less-advertised brands averaging 5,000+ unique child visitors or with audience shares that exceeded the share of child and teen visitors to the total internet in 2016.

Bold indicates that the site attracted relatively more child or teen visitors than visited the internet in total.

Source: comScore Media Metrix Key Measures report for children and teens (January - December 2016)

Changes in child visits to CFBAI company websites

Using a previous Rudd Center analysis,⁹ we also compared the number of child visitors to CFBAI brand websites in 2016 and in 2009. From 2009 to 2016, the number of child visitors to all websites declined substantially. Of the 26 CFBAI brand

websites that were most popular with children in 2009, eight have been discontinued and eleven averaged fewer than 1,000 child visitors per month in 2016 (see **Tables 27** and **28**). Notably, four of the seven sites with more than 60,000 child visitors in 2009 have been discontinued, including Millsberry.com (averaging 284,000 child visitors per month in 2009) and McWorld.com (averaging 101,000 child visitors).

Table 27. Status of CFBAI company websites that were popular with children in 2009 but not in 2016

Company	Website	2009		2016 status
		Avg monthly unique child (2-12 y) visitors (000)	Proportion of unique child (2-12 y) visitors to the website	
CFBAI listed brands:				
General Mills	Millsberry.com	284.3	18%	Discontinued
McDonald's	McWorld.com	100.9	33%	Discontinued
Campbell Soup Company	PfGoldfish.com	74.1	35%	Low volume*
Kellogg Company	AppleJacks.com	72.0	23%	Discontinued
Post Foods	Postopia.com	60.9	17%	Discontinued
Burger King	ClubBK.com	35.2	19%	Discontinued
Kellogg Company	RiceKrispies.com	17.1	6%	Low volume*
General Mills	ReesesPuffs.com	12.4	18%	Discontinued
Kellogg Company	CornPops.com	12.3	21%	Discontinued
CFBAI non-listed brands:				
Unilever	Klondikebar.com	32.7	25%	Low volume*
Nestle USA	Wonka.com	26.1	19%	Low volume*
Mondelez Global (formerly Kraft Foods)	NabiscoWorld.com	24.9	5%	Discontinued
The Coca-Cola Company	CocaColaZero.com	15.5	20%	Low volume*
The Coca-Cola Company	MyCoke.com	15.5	11%	Low volume*
Mars	M-MS.com	8.6	8%	Low volume*
Nestle USA	Butterfinger.com	6.6	14%	Low volume*
Mars	Twix.com	6.3	9%	Low volume*
Cadbury Adams	Stridegum.com	4.3	6%	Low volume*
Unilever	Pringles.com	2.9	9%	Low volume*

*Not enough child visitors on the comScore panel to measure child visitors or less than 1,000 unique child visitors monthly in 2016.

Source: comScore Media Metrix Key Measures report for children (January - December 2009; January - December 2016)

Table 28. CFBAI company websites with child visitors in 2009 and 2016

Company	Website	Avg monthly unique child (2-12 y) visitors (000)		
		2009	2016	Change from 2009 to 2016
CFBAI listed brands:				
McDonald's	HappyMeal.com	189.3	62.3	-67%
Kellogg Company	FrootLoops.com	58.6	9.2	-84%
General Mills	LuckyCharms.com	31.5	5.9	-81%
CFBAI non-listed brands:				
Mars	MMS.com	25.7	2.9	-89%
Kellogg Company	PopTarts.com*	21.4	1.4	-93%
Unilever	CountryCrock.com	10.9	2.2	-80%
PepsiCo	Cheetos.com	2.6	1.7	-35%

*In 2009, PopTarts was included on Kellogg's list of brands that may be advertised in child-directed media.

Source: comScore Media Metrix Key Measures report for children (January - December 2009; January - December 2016)

Child visitors to the remaining seven sites with 1,000 or more child visitors in both 2009 and 2016 declined dramatically during this time (see **Table 28**). HappyMeal.com was the second most popular site in 2009 with 190,000 unique child visitors per month, but two-thirds fewer children visited the site in 2016. However, during this same time the proportion of visitors to HappyMeal.com who were children increased, from 29% in 2009 to 43% in 2016.¹⁰ Similarly, the number of child visitors to LuckyCharms.com declined by 81% from 2009 to 2016, but the proportion of child visitors increased from 16% in 2009 to 58% in 2016.¹¹ MMS.com and PopTarts.com had the highest percentage decrease in child visitors of approximately 90% during this time. The number of child visitors to FrootLoops.com also decreased between 2009 and 2016, from 58,600 monthly child visitors to only 9,200 visitors in 2016.

Key findings

- Just over one-third of CFBAI listed brands maintained websites with child visitors in 2016. Although children (ages 2-12) were approximately twice as likely to visit these sites compared to older visitors, the number of children visiting most of them was low. HappyMeal.com and Lunchables attracted the most unique child visitors monthly (62,000 and 44,000, respectively). Just four of these sites would qualify as child-directed according to the CFBAI definition (i.e., ≥35% child audience).
- Although websites for CFBAI non-listed brands tended to attract fewer child visitors and children made up a smaller share of total visitors compared with websites for CFBAI listed brands, there were a few notable exceptions. McDonalds.com attracted more children (86,000 monthly) than any of the sites for CFBAI non-listed brands, including HappyMeal.

com. In addition, two Coca-Cola websites attracted more children than teens, including Coca-ColaStore.com where 30% of all visitors were children (ages 2-12).

- Many previously popular child-directed CFBAI company websites have been discontinued, including four sites that averaged more than 60,000 child visitors monthly in 2009 (Millsberry.com, McWorld.com, AppleJacks.com, and Postopia.com). The numbers of children visiting the remaining websites also declined substantially from 2009 to 2016, by 80% or more for the majority of the most popular child-directed websites in 2009.

Social media accounts

We examined syndicated data from Unmetric to assess CFBAI companies' active _____ in 2016, including on _____, _____, _____, and _____. We measured popularity, including _____ and _____ as of December 31, 2016 and _____ in 2016, and activity, including number of _____, _____, and _____ in 2016.

Approximately one-half of CFBAI listed brands maintained social media accounts, averaging 2.8 platforms per brand (see **Table 29**). However, compared to CFBAI top-50 non-listed brands, CFBAI listed brands' social media accounts tended to have fewer fans and post less frequently on Facebook and Twitter. Non-listed brands also averaged more platforms per account (3.6). On the other hand, Instagram accounts for CFBAI listed brands posted more frequently than accounts from other brands and companies. In addition to social media accounts for individual brands, 11 of the 18 CFBAI companies had company-level social media accounts that promoted more than one brand (General Mills had three company-level accounts). Top-50 CFBAI non-listed brands

Table 29. Popularity of CFBAI social media accounts and activity by type in 2016

	# of brands with accounts	Avg # of platforms per account	Facebook		Twitter		Instagram		YouTube				
			Fans (000)*		Posts	Followers (000)*		Video views (000)		Videos posted			
			Median	(Range)	Median	Median	(Range)	Median	(Range)	Median			
CFBAI listed brands	26	2.8	751	(1-2,966)	36	17	(2-187)	5	(1-18)	171	4,212	(22-52,200)	16
CFBAI non-listed top-50 brands	5	3.6	4,494	(1,066-12,000)	73	148	(44-426)	165	(2-328)	93	7,174	(2,053-85,200)	18
CFBAI company-level accounts	13	3.3	614	(<1-12,700)	165	177	(2-3,331)	269	(7-970)	152	20,200	(349-1,250,000)	57

*As of December 31, 2016

Source: Rudd Center analysis of Unmetric data (January-December 2016)

and company-level accounts also had the most followers on Instagram, as well as the most YouTube video views among the brands and companies examined.

CFBAI listed brands

We identified 26 _____ with active social media accounts in 2016, including 11 of the 16 listed brands that ranked in the top-50 brands advertised to children on TV in 2016. All brands had Facebook accounts, while about three-quarters ($n=20$) also had Twitter accounts, and one-third ($n=10$) had active Instagram accounts. Fourteen of those brands had 1 million or more fans or followers on at least one social media account (see **Table 30**). Brands with the most fans/followers differed by platform. Ten brands had more than 1 million Facebook fans. Kool-Aid had the most fans (almost 3 million), followed by Eggo with approximately 2 million fans. Quaker and Popsicle had the only Twitter accounts with more than 100,000 followers, followed by Cheerios with 75,000.

Only Cheerios and Bolthouse Farms had more than 10,000 Instagram fans, while Goldfish Smiles (Pepperidge Farm Goldfish) had 4,500.

Bolthouse Farms was the most active brand, leading in the number of Facebook posts (349), tweets (6,643), and Instagram posts (341) in 2016. Five listed brands in total had more than 100 Facebook posts, six brands exceeded 1,000 tweets in 2016, and three had more than 100 Instagram posts.

In addition, about 60% of CFBAI listed brands ($n=16$) with active Facebook accounts also had active YouTube channels in 2016. Six had more than 1 million video views in 2016 (see **Table 31**). Quaker had more than 50 million video views in 2016, while Cheerios and Cinnamon Toast Crunch had more than 25 million each. Quaker and PFGoldfishSmiles each posted more than 60 videos in 2016.

Although CFBAI listed brands that ranked in the top-50 brands advertised most to children on TV were more likely to maintain

Table 30. Popular social media accounts for CFBAI listed brands* in 2016

Company	Brand	Top-50 brand	Facebook		Twitter		Instagram	
			Fans (000)***	Posts	Followers (000)***	Tweets	Fans (000)***	Posts
The Kraft Heinz Company	Kool-Aid	✓	2,966	5				
Kellogg Company	Eggo		2,006	29	**			
The Kraft Heinz Company	Kraft Macaroni & Cheese	✓	1,481	25	22	524	2	15
PepsiCo	Quaker		1,362	130	187	1,686	**	
General Mills	Cinnamon Toast Crunch	✓	1,267	113	17	753	1	88
Unilever	Popsicle		1,243	4	113	924		
The Kraft Heinz Company	CapriSun	✓	1,196	31	4	1,367		
General Mills	Cheerios	✓	1,078	97	75	2,252	18	177
Kellogg Company	Frosted Flakes	✓	1,027	35				
Kellogg Company	Frosted Mini-Wheats		1,000	41	**			
The Kraft Heinz Company	Lunchables	✓	918	37	6	1,410		
Campbell Soup Company	Goldfish Smiles	✓	641	146	33	1,639	5	171
Campbell Soup Company	Bolthouse Farms		595	349	17	6,643	13,386	341
General Mills	Lucky Charms	✓	585	96	17	3,239		

*Includes all accounts with 1,000,000 or more fans or followers on any social media platform

**Account was active in 2016, but data not available

***As of December 31, 2016

Source: Rudd Center analysis of Unmetric data (January – December 2016)

Table 31. CFBAI listed brands with active YouTube channels* in 2016

Company	Brand	Top-50 brand	Video views (000)	Videos uploaded
PepsiCo	Quaker		52,152	68
General Mills	Cheerios	✓	30,928	39
General Mills	Cinnamon Toast Crunch (CTCtelevision)	✓	26,708	21
The Dannon Company	Oikos Yogurt		16,516	11
The Dannon Company	Activia		15,419	5
The Kraft Heinz Company	CapriSun Videos	✓	4,212	7

*Channels with more than 1,000,000 video views in 2016

Source: Rudd Center analysis of Unmetric data (January – December 2016)

Table 32. Popular social media accounts for CFBAI non-listed top-50 brands in 2016

Company	Brand	Facebook		Twitter		Instagram	
		Fans (000)*	Posts	Followers (000)*	Posts	Fans (000)*	Posts
The Hershey Company	Reese's Peanut Butter Cups	11,982	180	224	3,316		
PepsiCo	Lays	6,855	73	426	292	328	41
Kellogg Company	Pop Tarts	4,494	54	44	3,895	**	
General Mills	Yoplait	1,965	121	72	1,247	2	144
The Hershey Company	Kit Kat	1,066	60	**	629		

*As of December 31, 2016

**Account active in 2016, but data not available

Source: Rudd Center analysis of Unmetric data (January – December 2016)

active social media accounts (63%) compared with less-advertised brands (47%), some brands with less traditional advertising had the and active social media accounts. For example, Eggo, Quaker, Popsicle, and Frosted Mini-Wheats all had more than 1 million Facebook fans, while two of these brands (Quaker and Popsicle) were most popular on Twitter. Quaker also posted the most videos and had the most video views on YouTube in 2016. Bolthouse Farms had no advertising spending in 2016, but maintained popular and active accounts on all four platforms. Among the CFBAI listed brands with the most advertising to children, Cheerios and Cinnamon Toast Crunch (General Mills brands) maintained popular and active accounts on all four platforms. Capri Sun and Kraft Macaroni and Cheese (Kraft Heinz brands) ranked among the most popular on three of four social media platforms.

CFBAI company non-listed brands

Five CFBAI company brands that ranked in the top-50 brands advertised most to children on TV, but were not included on CFBAI lists of products that may be featured in child-directed advertising, also maintained social media accounts (see **Table 32**). All had Facebook and Twitter accounts, and three had Instagram accounts. Facebook accounts for these brands were some of the most popular accounts compared with all the companies in our analysis. One candy brand (Reese's) had more than 10 million fans on Facebook, while all had more than 1 million fans. Accounts for these brands also were among the most active in 2016. Reese's posted more than 100 times on Facebook. Three brands tweeted more than 1,000 times in 2016, while PopTarts and Reese's exceeded 3,000 tweets. Yoplait Yogurt posted more than 100 times on Instagram.

All CFBAI non-listed brands also maintained active YouTube channels in 2016 (see **Table 33**). All YouTube channels had more than 2 million video views in 2016, while Lays had over 85 million. All accounts also uploaded new videos frequently in 2016, ranging from 13 for KitKat to 34 for Yoplait.

Compared with CFBAI listed brands, CFBAI top-50 non-listed brands also marketed extensively on social media. Notably, these brands tended to be popular on Instagram and YouTube, which have become some of the most popular platforms for

Table 33. CFBAI non-listed top-50 brands with active YouTube channels in 2016

Company	Brand	Video views (000)	Videos uploaded
PepsiCo	Lays	85,243	18
The Hershey Company	Kit Kat	14,027	13
Kellogg Company	Pop Tarts	7,174	15
The Hershey Company	Reese's Peanut Butter Cups	3,773	21
General Mills	Yoplait	2,053	34

Source: Rudd Center analysis of Unmetric data (January – December 2016)

youth (under 18).¹² Furthermore, many of the YouTube channels promote versions of TV commercials, and companies are increasingly promoting their brands on YouTube to increase viewers¹³ given declining rates of TV viewing.

Company-level accounts

In addition to brand-level social media accounts, 11 CFBAI companies maintained 13 social media accounts that promoted multiple brands and/or the company generally. General Mills maintained three company-level accounts (General Mills, Betty Crocker, and General Mills Cereal). Twelve companies also maintained company-level Twitter accounts, and eight had accounts on Instagram. Nine of these accounts had 1 million or more fans or followers on at least one social media platform (see **Table 34**). Not surprisingly, company-level accounts tended to be more popular and more active than companies' individual brand accounts. On all three platforms, Coca-Cola Company and McDonald's had the most fans and followers, followed by Burger King. Each of these companies had more than 7 million Facebook fans, 1 million Twitter followers, and 400,000 Instagram fans. Hersheys and Betty Crocker also were among the six most popular CFBAI company-level accounts on Facebook, Twitter, and Instagram, while Nestle had a popular Twitter account. Notably, Ferrero USA spent less than \$100,000 in traditional advertising, but had more than 1 million Facebook fans.

Betty Crocker was the most active Facebook account, posting more than 500 times in 2016 while six additional accounts

Table 34. Popular CFBAI company-level social media accounts* in 2016

Company	Brand	Facebook		Twitter		Instagram	
		Fans (000)**	Posts	Followers (000)**	Posts	Fans (000)**	Posts
The Coca-Cola Company	Coca-Cola	12,651	177	3,308	36,429	775	133
McDonald's	McDonald's	10,534	325	3,331	174,294	970	151
Burger King Corporation	Burger King	7,512	187	1,454	3,411	445	187
The Hershey Company	Hershey's	6,915	180	178	4,112	64	149
General Mills	Betty Crocker	3,323	534	151	658	93	152
Ferrero USA	Ferrero USA	1,447	13	2	**		
Nestle USA	Nestle, USA	132	212	177	2,795		
Mondelez Global	Mondelez International	127	165	14	1,929		
General Mills	General Mills	16	26	73	2,258	7,227	461

*Includes all accounts with 1,000,000 or more fans or followers on any social media platform

**Account active in 2016, but data not available

***As of December 31, 2016

Source: Rudd Center analysis of Unmetric data (January – December 2016)

had more than 100 posts. On Twitter, McDonald's tweeted 174,000 times and Coca-Cola had 36,000 tweets in 2016. All other company-level Twitter accounts, except one, tweeted approximately 2,000 or more times. All company-level Instagram accounts had more than 100 posts, including 461 posts by General Mills.

In addition, 10 of the 13 company-level accounts had active YouTube channels in 2016, and six of these channels had more than 6 million video views (see **Table 35**). Coca-Cola Company also had the most popular and active YouTube channel among all the companies and brands in our report, with more than 1 billion views and 3,620 videos uploaded in 2016. BettyCrockerTV was second with 55 million views and 125 videos uploaded. Fast food companies, McDonald's and Burger King, as well as Hershey's and Mondelez also had very popular YouTube channels.

Table 35. CFBAI company-level active YouTube channels* in 2016

Company	Brand	Video views (000)	Videos uploaded
The Coca-Cola Company	Coca-Cola	1,245,322	3,620
General Mills	Betty Crocker TV	55,471	125
The Hershey Company	Hershey's	36,976	57
Mondelez Global	Mondelez International	20,220	54
McDonald's	McDonald's	16,904	122
Burger King Corporation	Burger King	6,688	56

*Channels with 1,000,000 or more video views in 2016

Source: Rudd Center analysis of Unmetric data (January – December 2016)

Key findings

- Approximately one-half of CFBAI listed brands maintained social media accounts, averaging 2.8 platforms per account. Some brands with little or no traditional advertising were among the most popular on social media, including Eggo, Quaker, and Popsicle. Bolthouse Farms had the most active social media accounts across all platforms.
- All top-50 CFBAI non-listed brands also maintained popular and active social media accounts (either brand or company-level accounts), and these accounts tended to be more popular than accounts for CFBAI listed brands. Reese's and/or Lays led in followers and fans on Facebook, Twitter, and Instagram, as well as YouTube video views, more than all other CFBAI brands in our analysis.
- However, company-level accounts that promoted more than one brand were most popular on all social media platforms. Coca-Cola and McDonald's had the most fans and followers on Facebook, Twitter, and Instagram, followed by Burger King. Coca-Cola's YouTube channel surpassed all others with 1.2 billion video views.

SPECIAL ISSUES IN INDUSTRY SELF-REGULATION

In this section, we examine three special issues regarding food industry self-regulatory programs: a) Children's Food and Beverage Advertising Initiative (CFBAI) category-specific uniform nutrition criteria used to identify products that may be in child-directed advertising; b) age ranges of children that are covered by CFBAI company pledges and c) Children's Confection Advertising Initiative (CCAI) company pledges to not direct advertising to children under age 12.

CFBAI nutrition criteria

The 11 _____ that engaged in _____ in 2016 listed 47 brands with products that met CFBAI's _____ as of January 1, 2017.¹ We examined the nutritional quality of all packaged food and drink products offered by these brands, including those on CFBAI company lists of products that may be advertised to children (i.e., CFBAI listed products) as well as products offered by the same brands that were not included on these lists (i.e., non-listed products). In addition, we analyzed the nutritional quality of products offered by CFBAI company brands that were not included on lists of products that may be advertised to children, but that ranked

in the top-50 brands with the most TV advertising viewed by children in 2016 (i.e., non-listed top-50 brands).

Two fast food brands were excluded from these analyses: Burger King Kid's Meal and McDonald's Happy Meal. Burger King included three Kid's Meal combinations and McDonald's included 12 Happy Meal combinations on their lists of products that may be advertised to children. Nutrition information about these products are included on the Company Profiles for McDonald's and Burger King. A previous analysis of fast food marketing in 2015 showed that McDonald's and Burger King offered 261 and 204 potential combinations, respectively, of main dish, side and drink in their kids' meals.² In addition, Scooby Doo cereal was not included in the analysis as the brand had been discontinued as of May 2017 (when nutrition data were collected). The Big G cereals brand included products offered by multiple General Mills cereal brands that are each reported separately in this analysis.

The remaining 43 CFBAI packaged food and drink brands offered 319 products that were included on the CFBAI list of products that may be featured in child-directed advertising as of January 1, 2017 (see **Table 36**).³ Twenty-five of these brands offered 386 additional _____ on company websites. In total, 55% of products offered by CFBAI brands with child-directed advertising were not included on lists of products that may be advertised to children. For example, General Mills was a CFBAI participating company

Table 36. Listed and non-listed products offered by CFBAI brands with child-directed advertising

Company	Brand	Listed products	Non-listed products
		Products on CFBAI company lists of products that may be in child-directed advertising	Other products offered by the same brands
Campbell Soup Company	Bolthouse Farms*	Shakedown (n=1)	none
	Pepperidge Farm Goldfish	Goldfish, Baked with Whole Grain (Cheddar, Pretzel, Xtra Cheddar), Favorites, Flavor Blasted, Grahams, Mix (n=17)	Baked with Whole Grain (other flavors), Favorites, Made with Organic Wheat, Special Edition (n= 13)
ConAgra Foods	Chef Boyardee pasta	Miscellaneous canned pasta (n=11)	All other canned pasta (n=33)
	Kid Cuisine	All other products (n=9)	Cheese Pizza, Mini Corn Dogs (n=2)
	Peter Pan Peanut Butter	All other plain flavors (n=9)	Honey Roasted flavor (n=4)
General Mills	Betty Crocker Fruit Snacks (Fruit by the Foot, Fruit Gushers, Fruit Roll-ups)	Fruit by the Foot (all), Fruit Gushers (all), Fruit Roll Ups (all), Fruit Snacks (Scooby Doo) (n=22)	Fruit Snacks (all other varieties) (n=9)
	Cheerios	Cheerios (original), Honey Nut (n=2)	All other flavors (n=10)
	Cinnamon and French Toast Crunch	Cinnamon and French Toast Crunch (n=2)	none
	Cocoa Puffs	Cocoa Puffs (n=1)	none
	Lucky Charms	Lucky Charms, Chocolate Lucky Charms (n=2)	none
	Other General Mills cereals	Cookie Crisp, Monsters (Count Chocula, Franken Berry, Boo Berry) Golden Grahams, Reese's Peanut Butter Puffs, Trix (n=7)	none
	Yoplait Go-Gurt	All flavors (n=10)	none
	Yoplait Kid Cup and Trix	All flavors (n=11)	none

Table 36. Listed and non-listed products offered by CFBAI brands with child-directed advertising (continued)

Company	Brand	Listed products	Non-listed products
Kellogg Company	Eggo	Homestyle Waffles, Eggo Bites Pancakes Chocolatey Chip (<i>n</i> =2)	Eggo Waffles (all other flavors), Eggo Minis (all flavors), Eggo Wafflers (all flavors) (<i>n</i> = 27)
	Froot Loops	Froot Loops, Froot Loops Bloopers (<i>n</i> =2)	Froot Loops with Marshmallows (<i>n</i> =1)
	Frosted Flakes	Frosted Flakes, Cinnamon Frosted Flakes (<i>n</i> =2)	w/ Marshmallows, w/ Choco Zucaritas (<i>n</i> =2)
	Frosted Mini-Wheats	Mini-Wheats Bite Size Original (<i>n</i> =1)	Frosted Mini-Wheats (all other flavors) (<i>n</i> =7)
	Other Kellogg's cereals	Apple Jacks*, Corn Pops, Rice Krispies (<i>n</i> =3),	Cocoa Krispies, Frosted Krispies, Rice Krispies Treats (<i>n</i> =3)
PepsiCo	Quaker Life	Original (<i>n</i> =1)	Cinnamon, Pumpkin Spice, Vanilla (<i>n</i> =3)
	Quaker Oats (and Instant Oatmeal)	Old Fashioned, Quick, Original Instant Oatmeal (<i>n</i> =3)	Instant Oatmeal (all other flavors) (<i>n</i> =28)
Post Foods	Fruity Pebbles Treats	Fruity Pebbles Treats (<i>n</i> =1)	none
	Other Post cereals	Alpha-Bits, Honey-Comb (<i>n</i> =2)	none
	Pebbles	Fruity Pebbles, Cocoa Pebbles, Cinnamon Pebbles (<i>n</i> =3)	Marshmallow Fruity Pebbles (<i>n</i> =1)
The Dannon Company	Activia	Fiber, Fruit, Light, Nonfat Greek (<i>n</i> =21)	Fruit Fusion, Lactose Free, Probiotic Drink (<i>n</i> =16)
	DanActive and Danimals	DanActive (all flavors), Nonfat Yogurt,	none
	Dannon Yogurt	Creamy Strawberry, Plain Nonfat (<i>n</i> =2)	Fruit on the Bottom, Lowfat, Plain Lowfat, Whole Milk (<i>n</i> =23)
	Light & Fit Yogurt	Nonfat Greek, Nonfat (<i>n</i> =35)	Carb & Sugar Control, Greek Crunch, Greek Mousse, Greek/Regular Zero Artificial Sweeteners, Yogurt Drink (<i>n</i> =33)
	Oikos Yogurt	Nonfat Greek, Triple Zero (<i>n</i> =17)	Whole Milk Greek, Yogurt Drinks (<i>n</i> =19)
The Kraft Heinz Company	Capri Sun	100% Juice, Organic, Roarin' Waters, Super V (<i>n</i> = 17)	Juice Drink, Sport Flavored Water Beverage (<i>n</i> =17)
	Kool-Aid	Easy Mix Liquid, Jammers, Liquid Drink Mix, On the Go Drink Mix, Singles (<i>n</i> =33)	Aguas Frescas, Drink Mix, Bursts, Soft Drink Mix (<i>n</i> =57)
	Kraft Macaroni & Cheese	Blue Box, Microwavable (<i>n</i> =23)	Deluxe (<i>n</i> =7)
	Kraft Polly-O	Mozzarella & Cheddar Twists (Regular, Reduced Fat, 2%), Reduced Fat String Cheese Mozzarella, 2% String Cheese (<i>n</i> =6)	All other flavors (<i>n</i> =10)
	Kraft Singles	All other flavors (<i>n</i> =10)	Skim American, Skim Sharp Cheddar (<i>n</i> =2)
	Lunchables	With 100% Juice (<i>n</i> =4)	Uploaded with drink, all other varieties with or without drinks (<i>n</i> =32)
Unilever	Popsicle	Disney Frozen, Hello Kitty, Marvel Avengers, Orange Cherry Grape, Rainbow, Red Classics, Scribblers, Spongebob Squarepants PopUp (<i>n</i> =8)	All other flavors (<i>n</i> =27)

*In addition to the Scooby Doo cereals brand, three products from other brands were discontinued after January 2017 (Bolthouse Farms Kids Fruit Tubes and Kids Smoothies and Kellogg's Cinnamon Jacks) and not included in the analyses. The Big G cereal brand includes multiple General Mills children's cereals.

Source: Rudd Center nutrition analysis (2017)

that had child-directed advertising. Cheerios was one of the company's CFBAI listed brands. General Mills listed three Cheerios products (original Cheerios, Honey Nut Cheerios, and Banana Nut Cheerios) that met CFBAI nutrition criteria and might be in child-directed advertising (i.e., CFBAI listed products). Cheerios also offered 10 products (e.g., Frosted Cheerios, Fruity Cheerios) that were not included on the CFBAI product list and therefore should not be advertised to children (i.e., non-listed products).

Overview of CFBAI listed and non-listed products

There was wide variation in the types of food and drinks listed by CFBAI companies for advertising to children. Most products

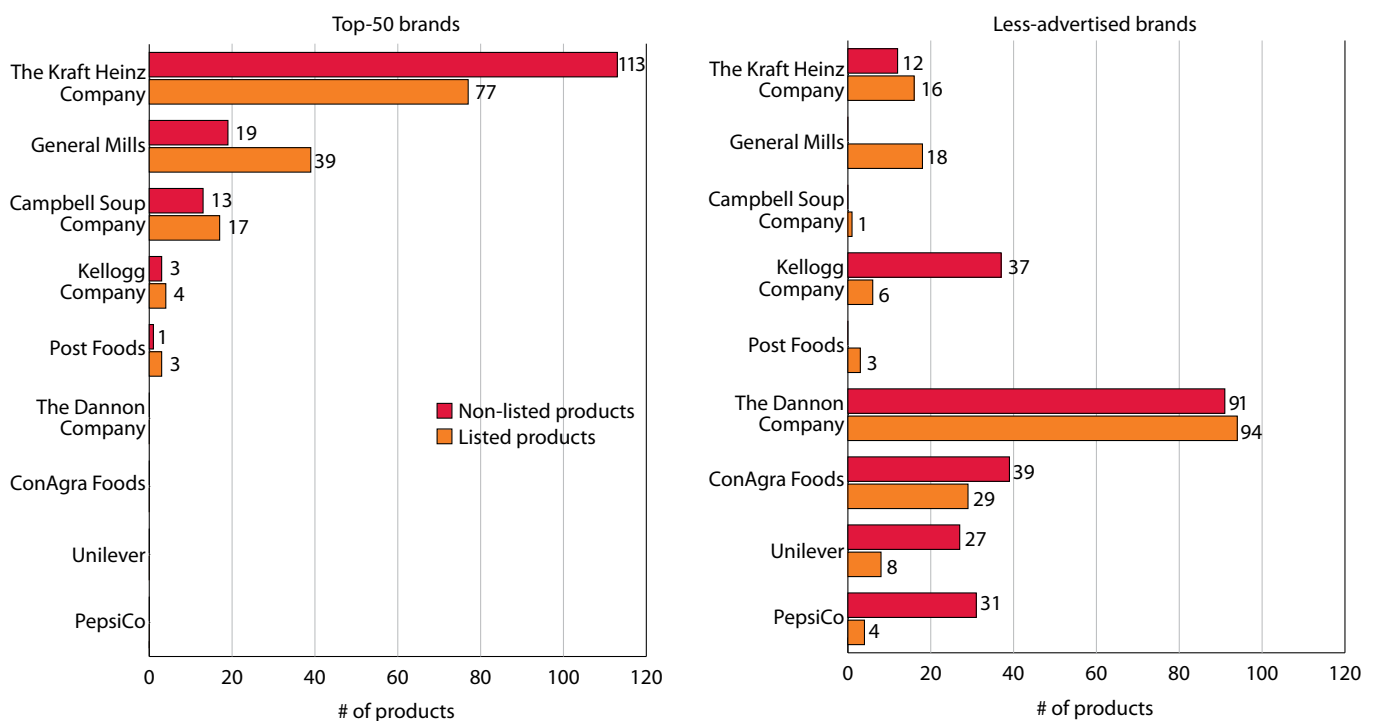
fell within eight general food and two beverage categories (see **Table 37**). These categories corresponded to 8 of the 10 CFBAI category designations used in the CFBAI category-specific uniform nutrition criteria. Approximately three out of four _____ were yogurts, meals or entrees, fruit-flavored drinks, or breakfast cereals. Only one vegetable and no fruit products were listed by CFBAI companies (excluding fast food side items) as products that may be featured in child-directed advertising, while 5% of listed products were 100% juice or juice drinks (with no added sweeteners).

Top-50 brands with the most TV advertising to children offered approximately 40% of both the listed products (*n*=140) and non-listed products (*n*=149) (see **Figure 15**). Among top-50 brands, Kraft Heinz offered the most listed and non-listed products. Among less-advertised brands, Dannon offered the

Table 37. Distribution of CFBAI listed products by food and beverage categories

General food category	# listed products	% of total listed products	CFBAI category
Yogurt	115	36%	Yogurts and yogurt-type products
Meal or entree	47	15%	Mixed dishes, main dishes and entrees, small meals and meals
Sweet snack	37	12%	Grain, fruit and vegetable products, and items not in other categories
Fruit-flavored drink	33	10%	Low-calorie drinks (exempt)
Cereal	31	10%	Grain, fruit and vegetable products, and items not in other categories
Juice	17	5%	Juices
Cheese	16	5%	Cheese and cheese products
Savory snack	13	4%	Grain, fruit and vegetable products, and items not in other categories
Peanut butter	9	3%	Seeds, nuts, and nut butters and spreads
Vegetable	1	<1%	Grain, fruit and vegetable products, and items not in other categories

Source: Rudd Center nutrition analysis (2017)

Figure 15. Listed and non-listed products offered by CFBAI brands with child-directed advertising

Source: Rudd Center nutrition analysis (2017)

most listed and non-listed products. Most companies offered more non-listed than listed products for the same brands, with a few exceptions: 75% of General Mills products, 58% of Campbell Soup products, and six of seven Post Foods products were included on companies' list of products that may be featured in child-directed advertising.

Nutrition analyses

From May to July 2017, researchers collected information on _____ and product _____ from company or brand websites for both listed and non-listed products offered by CFBAI brands (see **Methods** for detailed procedures).

When information was not available online, we obtained products from local stores or called company helplines if products were not available locally. CFBAI companies posted nutrient content and ingredient lists on their websites for nearly all CFBAI listed products, with the exception of The Kraft Heinz Company, which did not provide complete nutrition information for many of its brands. In calls to the Kraft Heinz customer service phone number, researchers were told that the company's products are continually modified and the product package is the only reliable source of nutrition information. Notably, none of the listed Lunchables products was available locally, but colleagues in other states were able to obtain the products and provide the nutrition information.

We evaluated the nutritional quality of packaged food and beverage products according to three nutrition criteria: the CFBAI category-specific uniform nutrition criteria,⁴ USDA Smart Snacks nutrition standards,⁵ and the Nutrition Profiling Index (NPI) score.⁶ CFBAI sets different nutrition criteria for 10 food and drink categories (including four subcategories for dairy), while Smart Snacks sets standards for three different food and drink categories. Both establish limits for energy, saturated fat, sodium, and sugar, and also set different requirements by food category for ingredients to encourage (e.g. ½ serving of whole grain, have vegetable as first ingredient). The NPI score was adapted from the nutrition rating system established by University of Oxford researchers for the Food Standards Agency in the United Kingdom to identify nutritious food and drinks that can be advertised to children on TV.⁷ The NPI scoring model produces a continuous score (0-100) to measure overall nutritional quality of the food based on total calories and proportion of nutrients to encourage and limit per weight of product. A NPI score of 64 or higher indicates a healthy food that may be advertised to children in the United Kingdom, and a score of 70 or higher indicates a healthy drink. Detailed descriptions of these nutrition criteria are included in the **Methods**. (See **Appendix C** for more detailed nutrient information.)

Product nutrition by CFBAI category

The CFBAI category-specific nutrition criteria established nutrients to limit and components to encourage for each designated food/drink category. In this analysis, we report results in six categories of food and drinks. In some cases, we separated or combined CFBAI categories when pertinent by nutrients, ingredients, and/or number of products offered.

We report the following: 1) yogurts (including “yogurts and yogurt-type products”); 2) meals and entrees (including “mixed dishes,” “main dishes and entrees,” “small meals,” and “meals”); 3) breakfast cereals (a subset of “grain, fruit and vegetable products, and items not in other categories”); 4) all other products in the “grain, fruit and vegetable products, and items not in other categories”; 5) all other food product categories (including “cheese and cheese products” and “seeds, nuts, and nut butters and spreads”); and 6) beverages (including “juices” and “low-calorie beverages”). As of January 2017, there were no listed products in two CFBAI categories: “soups and meal sauces” and “meat, fish, and poultry products.”

Yogurt products

Yogurt products comprised 30% of all listed products in this analysis, and products in the yogurt category were most likely to meet all nutrition standards. All listed yogurts had healthy _____ of 64 or higher, with concentration of sugar and protein as the main differences in overall nutritional quality (see **Table 38**). For example, Yoplait Go-Gurt had the lowest median NPI score due to relatively high sugar density (14% sugar by weight). Conversely, Oikos Yogurt had the highest NPI score because of its low sugar density (4% by weight) and high protein content at 10% per weight. Notably, Yoplait Go-Gurt was the only brand of yogurt that ranked in the top-50 brands with the most TV advertising to children in 2016.

Most CFBAI listed yogurt products (89%) met _____ limits for calories, sodium, total fat, and sugar. Notably, all products offered by DanActive, Danimals, and Yoplait Kid Cup, Trix and Go-Gurt were included on CFBAI lists of products that may be featured in child-directed advertising. However, some

Table 38. Yogurts: NPI scores and nutrient content per serving for CFBAI listed products

Company	Brand	Top-50 brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
				Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
The Dannon Company	Oikos Yogurt		17	88	(74-88)	120	(80-120)	6	(6-14)	65	(50-150)	0.0	
The Dannon Company	Light & Fit Yogurt		35	76	(72-80)	80	(70-120)	7	(6-9)	55	(45-95)	0.0	
The Dannon Company	Activia		21	72	(68-78)	90	(60-120)	13	(6-17)	55	(50-75)	1.0	(0.0-1.0)
The Dannon Company	Dannon Yogurt		2	71	(70-72)	100	(80-120)	14	(12-15)	115	(80-150)	0.0	
The Dannon Company	DanActive and Danimals		19	68	(66-70)	70	(60-80)	12	(10-14)	40	(40-65)	0.0	(0.0-1.0)
General Mills	Yoplait Kid Cup and Trix		11	66	(66-68)	100	(70-100)	13	(8-13)	60	(45-60)	0.0	(0.0-1.5)
General Mills	Yoplait Go-Gurt	✓	10	64	(64-66)	60	(50-60)	9	(8-9)	30	(30-30)	0.0	

Source: Rudd Center nutrition analysis (2017)

Table 39. Yogurts: Ingredients and Smart Snacks limits for listed products

Company	Brand	# of products	% of products that contained:			Smart Snacks standards	
			Fruit or vegetable	Added sugar	Non-nutritive sweetener	% of products meeting limits	Nutrients exceeding limits
The Dannon Company	Oikos Yogurt	17	12%	18%	76%	100%	
The Dannon Company	Light & Fit Yogurt	35	37%	97%	97%	100%	
The Dannon Company	Activia	21	52%	76%	33%	67%	Sat fat
The Dannon Company	Dannon Yogurt	2	0%	50%	0%	100%	
The Dannon Company	DanActive and Danimals	19	0%	100%	0%	79%	Sat fat
General Mills	Yoplait Kid Cup and Trix	11	0%	100%	0%	82%	Sat fat
General Mills	Yoplait Go-Gurt	10	0%	100%	0%	100%	

Source: Rudd Center nutrition analysis (2017)

Table 40. Yogurts: NPI scores and nutrient content per serving for non-listed products

Company	Brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
			Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
The Dannon Company	Oikos Yogurt	19	72	(68-78)	150	(110-180)	13	(11-21)	50	(40-140)	1.5	(0.0-3.0)
The Dannon Company	Light & Fit Yogurt	33	76	(72-82)	90	(45-130)	10	(2-12)	85	(25-115)	0.0	(0.0-2.5)
The Dannon Company	Activia	16	70	(66-72)	100	(90-170)	13	(12-26)	55	(50-75)	1.0	(0.0-2.0)
The Dannon Company	Dannon Yogurt	23	66	(66-72)	140	(100-150)	16	(10-22)	80	(70-150)	3.0	(1.0-5.0)

Source: Rudd Center nutrition analysis (2017)

DanActive, Danimals, and Yoplait Kid Cup and Trix products did not meet Smart Snacks limits due to more than 10% of calories from saturated fat (see **Table 39**). In addition, all products from Danactive, Danimals, and Yoplait Go-Gurt, Kid Cup, and Trix contained _____ and no fruit as _____ (i.e., listed as one of the first five ingredients). Activia, Light & Fit Yogurt, and Oikos Yogurt were the only yogurt brands with fruit as main ingredients in any of their products, although at least one-third of products offered by those brands also had non-nutritive sweeteners.

A total of 91 yogurt products (44%) offered by CFBAI brands were not listed as products that may be featured in child-directed advertising (see **Table 40**). These products were similar in overall nutritional quality to listed products with a median NPI score of 70. However, non-listed products had more median calories (50 kcal), sugar (4.5 g), sodium (25 mg), and saturated fat (1 g) per weight (100g) compared to median values for listed yogurts.

Meals and entrees

A total of 47 listed products belonged to the CFBAI mixed dishes, main dishes and entrees, small meals, or meals categories. As with yogurts, all listed meals and entrees had healthy NPI scores with little variation between products (see **Table 41**). Chef Boyardee pasta dishes had the highest median NPI score and lowest median calories and saturated

fat per serving. Even though Kid Cuisine products had some of the highest median calories and saturated fat per serving, they also had the highest median protein (6%) and fiber (3%) per weight compared to the other products in this category. There was low variability in sodium content in this category. It is interesting to note that Kraft Macaroni and Cheese Blue Box products had higher NPI scores than the brand's Microwavable pre-made products, as well as higher median calories, sugar, sodium, and saturated fat per serving. Even after controlling for serving size, the Microwaveable products contained more calories, saturated fat, sugar, and sodium, and less fiber and protein than Blue Box products.

All listed Chef Boyardee pasta products had tomatoes and whole grains as main ingredients, but every product also contained added sugars (see **Table 42**). Similarly, all Kid Cuisine products included whole grains, and some also had vegetables, as main ingredients. However, all Kid Cuisine products also included added sugars and some contained non-nutritive sweeteners. In contrast, just one of the listed Kraft Macaroni & Cheese Blue Box products included whole grains. All listed Lunchables products included 100% fruit juice, but all also contained added sugar in their ingredients. Despite generally healthy NPI scores, most of the products in this category (81%) exceeded the Smart Snacks limits for sodium, and some products also exceeded limits for saturated fat and calories.

Table 41. Meals and entrees: NPI scores and nutrient content per serving for listed products

Company	Brand	Top-50 brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
				Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
ConAgra Foods	Chef Boyardee pasta		11	72	(70-76)	170	(150-200)	7	(6-11)	550	(500-600)	0.5	(0.0-2.0)
ConAgra Foods	Kid Cuisine		9	72	(68-74)	410	(330-440)	9	(5-16)	480	(430-540)	3.5	(1.5-4.5)
The Kraft Heinz Company	Kraft Macaroni & Cheese (Blue Box)	✓	16	68	(66-70)	280	(240-290)	8	(7-9)	565	(470-610)	2.3	(1.0-3.0)
The Kraft Heinz Company	Lunchables (with 100% Juice)	✓	4	67	(64-68)	380	(360-430)	36	(24-37)	580	(570-600)	4.3	(4.0-4.5)
The Kraft Heinz Company	Kraft Macaroni & Cheese (Microwaveable)	✓	7	64	(64-66)	220	(210-220)	6	(3-6)	460	(460-530)	2.0	(1.5-2.0)

Source: Rudd Center nutrition analysis (2017)

Table 42. Meals and entrees: Ingredients and Smart Snacks limits for listed products

Company	Brand	# of products	% of products that contained:				Smart Snacks standards		
			Fruit or vegetable	Whole grain	Added sugar	Non-nutritive sweetener	% of products meeting limits	Nutrients exceeding limits	
ConAgra Foods	Chef Boyardee pasta	11	100%	100%	100%	0%	0%	Sodium	
ConAgra Foods	Kid Cuisine	9	33%	100%	100%	44%	33%	Calories, sodium	
The Kraft Heinz Company	Kraft Macaroni & Cheese (Blue Box)	16	0%	6%	0%	0%	6%	Sodium, sat fat	
The Kraft Heinz Company	Lunchables (with 100% Juice)	4	100%	0%	100%	0%	0%	Calories, sodium	
The Kraft Heinz Company	Kraft Macaroni & Cheese (Microwaveable)	7	0%	0%	29%	0%	71%	Sodium	

Source: Rudd Center nutrition analysis (2017)

Table 43. Meals and entrees: NPI scores and nutrient content per serving for non-listed products

Company	Brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
			Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
ConAgra Foods	Chef Boyardee pasta	33	68	(62-72)	220	(150-290)	8	(2-10)	700	(410-850)	3.0	(0.0-6.0)
ConAgra Foods	Kid Cuisine	2	67	(66-68)	470	(450-490)	22		620	(480-760)	4.3	(3.5-5.0)
The Kraft Heinz Company	Lunchables (Uploaded)	7	66	(64-66)	440	(380-510)	20	(17-25)	750	(660-810)	6.0	(3.5-7.0)
The Kraft Heinz Company	Kraft Macaroni & Cheese (Deluxe)	7	62	(62-66)	310	(270-320)	4	(3-6)	900	(700-980)	3.0	(2.0-3.5)
The Kraft Heinz Company	Lunchables (all other varieties)*	23	46	(22-70)	320	(140-500)	13	(2-32)	620	(370-870)	7.0	(1.5-8.0)

*Nutrition information could not be obtained for two products

Source: Rudd Center nutrition analysis (2017)

CFBAI brands also offered 74 meal and entree products (61% of products in the category) that were not listed as products that may be featured in advertising to children. For all CFBAI brands in this category, non-listed products were generally less nutritious than listed products, with the biggest differences between listed and non-listed Lunchables and Kraft Macaroni and Cheese products (see **Table 43**). All listed products from these brands had healthy NPI scores (≥ 67), while the median NPI score was 46 for non-listed Lunchables and 62 for non-listed Kraft Macaroni and Cheese products. In addition, non-listed Lunchables (including Uploaded products) contained as many as 510 calories.

Breakfast cereals

CFBAI companies listed a total of 31 hot and cold breakfast cereal products from 14 brands that may be featured in child-directed advertising. NPI scores and median nutrient content were calculated individually for top-50 brands, but we combined results for less-advertised brands when nutrient content was similar (labeled as "other *Company* cereals") (see **Table 44**).

The two most nutritious products in this category were offered by two less-advertised brands: Quaker Oats and Kellogg's

Frosted Mini-Wheats had healthy median NPI scores. Although Frosted Mini-Wheats had the highest grams of sugar per serving, the product also weighed more than other cereals. As a result, when compared gram by gram to other cereals, such as Lucky Charms, Frosted Mini-Wheats had 16% less sugar per gram. Of the two listed Cheerios products, Original Cheerios had a healthy NPI score of 70 while Honey Nut Cheerios had an unhealthy score of 46. The nutrient differences between healthy and unhealthy NPI scores in this category were primarily sugar, sodium, and dietary fiber per gram of product.

All Quaker Oats and General Mills cereals contained whole grains as main ingredients, but Quaker Oats products were the only cereals that did not contain added sugars (see **Table 45**). The majority of cereals (87%) met Smart Snacks limits for nutrients of concern, with the exception of General Mills Lucky Charms, Kellogg's Froot Loops, and other Kellogg's cereals that exceeded sugar or sodium limits.

All products from Cinnamon and French Toast Crunch, Cocoa Puffs, Lucky Charms, other General Mills cereals, and other Post Cereal brands were listed as products that may be advertised to children (see **Table 46**). However, 63% of all cereal products

Table 44. Breakfast cereals: NPI scores and nutrient content per serving for listed products

Company	Brand	Top-50 brand	# of products	NPI score	Total calories (kcal)	Total sugar (g)	Sodium (mg)	Sat fat (g)
				Median (Range)	Median (Range)	Median (Range)	Median (Range)	Median (Range)
PepsiCo	Quaker Oats (and Instant Oatmeal)		3	80 (78-80)	150 (100-150)	1 (0-1)	0 (0-75)	0.5 (0.0-0.5)
Kellogg Company	Frosted Mini-Wheats		1	74	190	11	0	0.0
General Mills	Cheerios	✓	2	58 (46-70)	105 (100-110)	5 (1-9)	150 (140-160)	0.3 (0.0-0.5)
PepsiCo	Quaker Life		1	54	120	6	160	0.0
General Mills	Cocoa Puffs	✓	1	48	100	9	100	0.0
Post Foods	Other Post cereals		2	48 (44-52)	125 (120-130)	8 (6-10)	180	0.0
General Mills	Other General Mills cereals		7	46 (38-46)	120 (100-130)	9 (9-10)	150 (120-240)	0.0 (0.0-0.5)
Kellogg Company	Other Kellogg's cereals		3	46 (44-46)	120 (110-130)	9 (4-10)	150 (105-190)	0.0 (0.0-0.5)
Kellogg Company	Froot Loops	✓	2	46 (46-46)	110 (110-110)	10 (10-10)	150 (150-150)	0.5 (0.5-0.5)
General Mills	Lucky Charms	✓	2	45 (42-48)	110 (110-110)	10 (10-10)	160 (150-170)	0.0
General Mills	Cinnamon and French Toast Crunch	✓	2	44 (44-44)	120 (110-130)	9 (9-9)	160 (140-180)	0.3 (0.0-0.5)
Kellogg Company	Frosted Flakes	✓	2	40 (38-42)	110 (110-110)	10 (10-10)	150 (150-150)	0.0
Post Foods	Pebbles	✓	3	30 (28-36)	120 (110-120)	10 (9-10)	170 (140-180)	1.0 (0.0-1.0)

Source: Rudd Center nutrition analysis (2017)

Table 45. Breakfast cereals: Ingredients and Smart Snacks limits for listed products

Company	Brand	% of products that contained:			Smart Snacks standards	
		# of products	Whole grain	Added sugar	products meeting limits	Nutrients exceeding limits
PepsiCo	Quaker Oats (and Instant Oatmeal)	3	100%	0%	100%	
Kellogg Company	Frosted Mini-Wheats	1	100%	100%	100%	
General Mills	Cheerios	2	100%	100%	100%	
PepsiCo	Quaker Life	1	100%	100%	100%	
General Mills	Cocoa Puffs	1	100%	100%	100%	
Post Foods	Other Post cereals	2	50%	100%	100%	
General Mills	Other General Mills cereals	7	100%	100%	100%	
Kellogg Company	Other Kellogg's cereals	3	0%	100%	67%	Sodium
Kellogg Company	Froot Loops	2	0%	100%	50%	Sugar
General Mills	Lucky Charms	2	100%	100%	0%	Sugar
General Mills	Cinnamon and French Toast Crunch	2	100%	100%	100%	
Kellogg Company	Frosted Flakes	2	0%	100%	100%	
Post Foods	Pebbles	3	0%	100%	100%	

Source: Rudd Center nutrition analysis (2017)

Table 46. Breakfast cereals: NPI scores and nutrient content per serving for non-listed products

Company	Brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
			Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
Kellogg Company	Frosted Mini-Wheats	7	74	(54-82)	190	(190-200)	12	(0-12)	0	(0-210)	0.0	(0.0-1.0)
PepsiCo	Quaker Instant Oatmeal and Oats	28	52	(46-82)	160	(100-240)	11	(0-14)	205	(0-290)	0.5	(0.0-2.0)
General Mills	Cheerios	10	51	(46-56)	110	(100-220)	9	(5-17)	123	(105-280)	0.0	(0.0-0.5)
PepsiCo	Quaker Life	3	54	(52-54)	120	(120-120)	6	(6-8)	160	(150-160)	0.0	(0.0)
Kellogg Company	Other Kellogg's cereals	3	38	(36-40)	120	(120-120)	12	(9-12)	130	(110-170)	0.5	(0.0-0.5)
Kellogg Company	Froot Loops	1	40		110		14		115		0.0	
Kellogg Company	Frosted Flakes	2	32	(30-34)	115	(110-120)	12	(12-12)	148	(135-160)	0.5	(0.0-1.0)
Post Foods	Pebbles	1	32		110		13		160		0.0	

Source: Rudd Center nutrition analysis (2017)

($n=55$) from CFBAL brands were not listed, primarily products from Quaker Oats ($n=28$) and Cheerios ($n=10$). On average, non-listed cereal products had lower median NPI scores compared to listed products, but differences varied widely by brand. For example, all listed and non-listed Frosted Mini-Wheats and Quaker Life products had the same NPI scores, while non-listed products were healthier than listed products

for other Kellogg's cereals and Pebbles. In contrast, non-listed Quaker Oats products had median NPI scores that were 28 points lower than scores for listed products. Notably, all non-listed Cheerios products were similar in nutrition content to one listed product (Honey Nut Cheerios), but 19 points lower than the brand's other listed product (regular Cheerios).

Other grain, fruit and vegetable products, and items not in other categories

This CFBAI category includes baked grains, sweet and savory snacks, vegetables, and frozen desserts (in addition to the breakfast cereals analyzed in the previous section). The 50 listed products in this category (excluding breakfast cereals) belonged to a range of food groups (see **Table 47**). The only vegetable on the list was Bolthouse Farms Shakedown Carrot Meets Ranch, which also had the only healthy NPI score in the category. Other products in this category included Betty Crocker Fruit Snacks and Popsicles,⁸ which were high in sugar without any substantial nutritional value. Pepperidge Farm Goldfish had lower sugar and relatively high fiber and protein, but also contained high amounts of saturated fat and

the highest energy density in the category. Eggo waffles and Fruity Pebbles Treats had high concentrations of saturated fat.

When assessing these products against Smart Snacks standards, Bolthouse Farms and Pepperidge Farm Goldfish failed to meet the sodium standard (see **Table 48**). Every Pepperidge Farm Goldfish product listed included whole grains, but one-quarter failed to meet Smart Snacks limits for sugar. Furthermore, just one-third of the Betty Crocker Fruit Snacks listed fruit as a main ingredient, and all failed to meet the sugar limit. Fruity Pebbles Treats had whole grains, but also high concentrations of saturated fat.

Two brands, Bolthouse Farms and Fruity Pebbles Treats, offered and listed only one product. Other brands in this category offered 76 non-listed products (60% of products

Table 47. Other grain, fruit and vegetable products, and items not in other categories: NPI scores and nutrient content per serving for listed products

Company	Brand	Top-50 brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
				Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
Campbell Soup Company	Bolthouse Farms		1	78		25		4		200		0.0	
Unilever	Popsicle		8	63	(62-64)	50	(20-70)	9	(7-11)	0	(0-15)	0.0	(00-0.5)
Kellogg Company	Eggo (Waffles and Bites)		2	51	(46-56)	160	(140-180)	6	(2-10)	275	(190-360)	1.3	(1.0-1.5)
Campbell Soup Company	Pepperidge Farm Goldfish	✓	17	40	(12-48)	140	(120-140)	1	(0-10)	250	(105-290)	1.0	(0.0-1.5)
General Mills	Betty Crocker Fruit Snacks	✓	22	34	(30-42)	80	(40-90)	10	(5-10)	48	(25-50)	0.5	(00-0.5)
Post Foods	Fruity Pebbles Treats		1	24		90		9		75		1.5	

Source: Rudd Center nutrition analysis (2017)

Table 48. Other grain, fruit and vegetable products, and items not in other categories: Ingredients and Smart Snacks limits for listed products

Company	Brand	# of products	% of products that contained:			Smart Snacks standards	
			Fruit or vegetable	Whole grain	Added sugar	% of products meeting limits	Nutrients exceeding limits
Campbell Soup Company	Bolthouse Farms	1	100%	0%	0%	0%	Sodium
Unilever	Popsicle	8	0%	0%	100%	100%	
Kellogg Company	Eggo (Waffles and Bites)	2	0%	0%	50%	100%	
Campbell Soup Company	Pepperidge Farm Goldfish	17	0%	100%	47%	29%	Sodium, sugar
General Mills	Betty Crocker Fruit Snacks	22	36%	0%	100%	0%	Sugar, sodium
Post Foods	Fruity Pebbles Treats	1	0%	0%	100%	0%	Sugar

Source: Rudd Center nutrition analysis (2017)

Table 49. Other grain, fruit and vegetable products, and items not in other categories: NPI scores and nutrient content per serving for non-listed products

Company	Brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
			Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
Unilever	Popsicle	27	64	(58-70)	40	(15-110)	8	(0-17)	0	(0-35)	0.0	(0.0-1.0)
Kellogg Company	Eggo	27	50	(34-68)	180	(140-300)	6	(2-16)	300	(240-550)	2.0	(0.5-3.5)
Campbell Soup Company	Pepperidge Farm Goldfish	13	42	(26-52)	140	(130-150)	0	(0-8)	240	(140-430)	1.0	(0.5-1.0)
General Mills	Betty Crocker Fruit Snacks	9	42	(42-42)	80	(80-80)	10	(10-10)	25	(25-25)	0.0	

Source: Rudd Center nutrition analysis (2017)

within this category) (see **Table 49**). As with listed products, most non-listed products did not have a healthy NPI score. However, median NPI scores of non-listed products were 14 points lower than listed products. In contrast, one Eggo product, NutriGrain Low Fat Waffles, had a higher NPI score (68) than any of the brand's listed products due to lower calories, saturated fat, and sugar, and more fiber, even though these products may not be featured in child-directed advertising. Four non-listed Popsicles had healthy NPI scores (≥ 70), including one product with reduced sugar and three products with no added sugars, but non-nutritive sweeteners.

Other food categories

Three CFBAI listed brands offered 25 products in two additional CFBAI food categories ("cheese and cheese products", "seeds, nuts, and nut butters and spreads"). None of the 25 listed cheese and nut butter products were top-50 brands, and all had unhealthy NPI scores (see **Table 50**). Peter Pan Peanut Butter had relatively high saturated fat and energy-density. Kraft Polly-O string cheese and Kraft Singles were less energy-dense, but high in saturated fat and sodium, provided little or no fiber, and were relatively low in protein.

Table 50. Cheese and peanut butter: NPI scores and nutrient content per serving for listed products

Company	Brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
			Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
ConAgra Foods	Peter Pan Peanut Butter	9	56	(54-66)	210	(150-210)	3	(2-4)	130	(100-150)	3.0	(2.0-3.5)
The Kraft Heinz Company	Kraft/Polly-O	6	34	(30-34)	60	(50-70)	0	(0-1)	145	(140-190)	2.3	(2.0-2.5)
The Kraft Heinz Company	Kraft Singles	10	22	(20-28)	60	(45-60)	2	(1-2)	235	(200-280)	2.5	(1.5-2.5)

Source: Rudd Center nutrition analysis (2017)

Table 51. Cheese and peanut butter: Ingredients and Smart Snacks limits for listed products

Company	Brand	# of products	% of products that contained:		Smart Snacks standards	
			Added sugar	% of products meeting limits	% of products meeting limits	Nutrients exceeding limits
ConAgra Foods	Peter Pan Peanut Butter	9	100%	44%	44%	Calories
The Kraft Heinz Company	Kraft/Polly-O	6	0%	100%	100%	
The Kraft Heinz Company	Kraft Singles	10	0%	40%	40%	Sodium

Source: Rudd Center nutrition analysis (2017)

Table 52. Cheese and peanut butter: NPI scores and nutrient content per serving for non-listed products

Company	Brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
			Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
ConAgra Foods	Peter Pan Peanut Butter	4	35	(28-36)	210	(210-220)	7	(6-8)	115	(100-130)	3.0	(3.0-3.0)
The Kraft Heinz Company	Kraft/Polly-O	10	30	(24-32)	70	(70-80)	0	(0-1)	185	(150-220)	3.0	(2.5-3.5)
The Kraft Heinz Company	Kraft Singles	2	46	(46-46)	25	(25-25)	1	(1-1)	250	(250-250)	0.0	(0.0)

Source: Rudd Center nutrition analysis (2017)

More than half of Peter Pan Peanut Butter products exceeded Smart Snacks limits for calories per serving, and all had added sugars (see **Table 51**). Kraft/Polly-O cheese products met Smart Snacks limits for calories, sugar, and sodium, but 17% did not meet standards for saturated fat. Most Kraft Singles products did not meet the limit for sodium.

These three brands also offered 25 non-listed products. Non-listed Peter Pan Peanut Butter products included its Honey Roast products, which had higher sugar content than listed products. Despite some reduced-fat Kraft/Polly-O listed products, median NPIs for non-listed products were just four points lower than listed products (see **Table 52**). On the other hand, non-listed Kraft Singles Skim products had less saturated fat and calories and higher median NPI scores than listed (regular and 2% fat) products.

Beverages

The CFBAI category-specific uniform nutrition criteria contained one beverage category (juices), which required at least 4 ounces of 100% fruit and/or vegetable juice per serving and no added sugar. However, low-calorie beverages were exempt from these criteria (i.e., products with ≤40 kcal

per 8 oz serving). Capri Sun listed 11 juice products that may be advertised to children (see **Table 53**). Some Capri Sun varieties (Organic, Super V Fruit and Vegetable Juice Drink Blend) consisted of water and 100% fruit juice, thus lowering calorie and sugar concentrations without adding non-nutritive sweeteners. In addition, Kool-Aid and Capri Sun Roarin' Waters brands also listed 39 low-calorie beverages. The added sugar content of these products varied widely, ranging from 0 to 11 grams per serving. Notably, all CFBAI listed brands in the beverage category were offered by The Kraft Heinz Company.

Smart Snacks standards allow 8-ounce containers of 100% juice, but they only allow low-calorie drinks with added sugar and/or non-nutritive sweeteners in high schools (but not elementary or middle schools). All Capri Sun Roarin' Waters products contained both added sugar and non-nutritive sweeteners, while two-thirds of listed Kool-Aid products had added sugar and three-quarters contained non-nutritive sweeteners as shown in **Table 54**.

In addition to 17 listed products, Capri Sun offered 17 non-listed products, including a sports drink and a fruit drink that were not included on the list of products that may be featured

Table 53. Beverages: NPI scores and nutrient content per serving for listed products

Company	Brand	Top-50 brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
				Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
The Kraft Heinz Company	Capri Sun - 100% juice and juice blends*	✓	11	70	(68-76)	70	(70-90)	17	(14-21)	25	(20-30)	0.0	
The Kraft Heinz Company	Kool-Aid	✓	33	70	(68-70)	30	(0-40)	7	(0-11)	0	(0-20)	0.0	
The Kraft Heinz Company	Capri Sun Roarin' Waters	✓	6	68	(68-68)	30	(30-30)	8	(8-8)	15	(15-15)	0.0	

*Includes Capri Sun 100% Juice, Organic Juice, and Super V Fruit & Vegetable Juice Blend

Source: Rudd Center nutrition analysis (2017)

Table 54. Beverages: Ingredients for listed products

Company	Brand	# of products	% of products that contained		
			Fruit or vegetable	Added sugar	Non-nutritive sweetener
The Kraft Heinz Company	Capri Sun - 100% juice and juice blends*	11	100%	0%	0%
The Kraft Heinz Company	Kool-Aid	33	0%	70%	76%
The Kraft Heinz Company	Capri Sun - Roarin' Waters	6	0%	100%	100%

*Includes Capri Sun 100% Juice, Organic Juice, and Super V Fruit & Vegetable Juice Blend

Source: Rudd Center nutrition analysis (2017)

Table 55. Beverages: NPI scores and nutrient content per serving for non-listed products

Company	Brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
			Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
The Kraft Heinz Company	Kool-Aid	39	70	(70-70)	0	(0-20)	0	(0-5)	10	(0-30)	0.0	
The Kraft Heinz Company	Capri Sun Sport	3	68	(68-68)	30	(30-30)	8	(8-8)	85	(85-85)	0.0	
The Kraft Heinz Company	Capri Sun	14	68	(66-68)	50	(50-60)	13	(13-16)	15	(15-25)	0.0	
The Kraft Heinz Company	Kool-Aid Drink Mix	18	68	(68-68)	60	(60-70)	16	(16-17)	0	(0-25)	0.0	

Source: Rudd Center nutrition analysis (2017)

in child-directed advertising (see **Table 55**). Capri Sun fruit drinks had lower calories than its fruit juices, but contained 13 to 16 grams of total sugar per serving and just 5% fruit juice. Capri Sun Sports drinks had both added sugars and non-nutritive sweeteners. Kool-Aid also offered 57 non-listed drink products (63% of products). All Kool-Aid non-listed products were drink mix powders, including some unsweetened products for consumers to add their own sugar.

Evaluation of CFBAI nutrition criteria

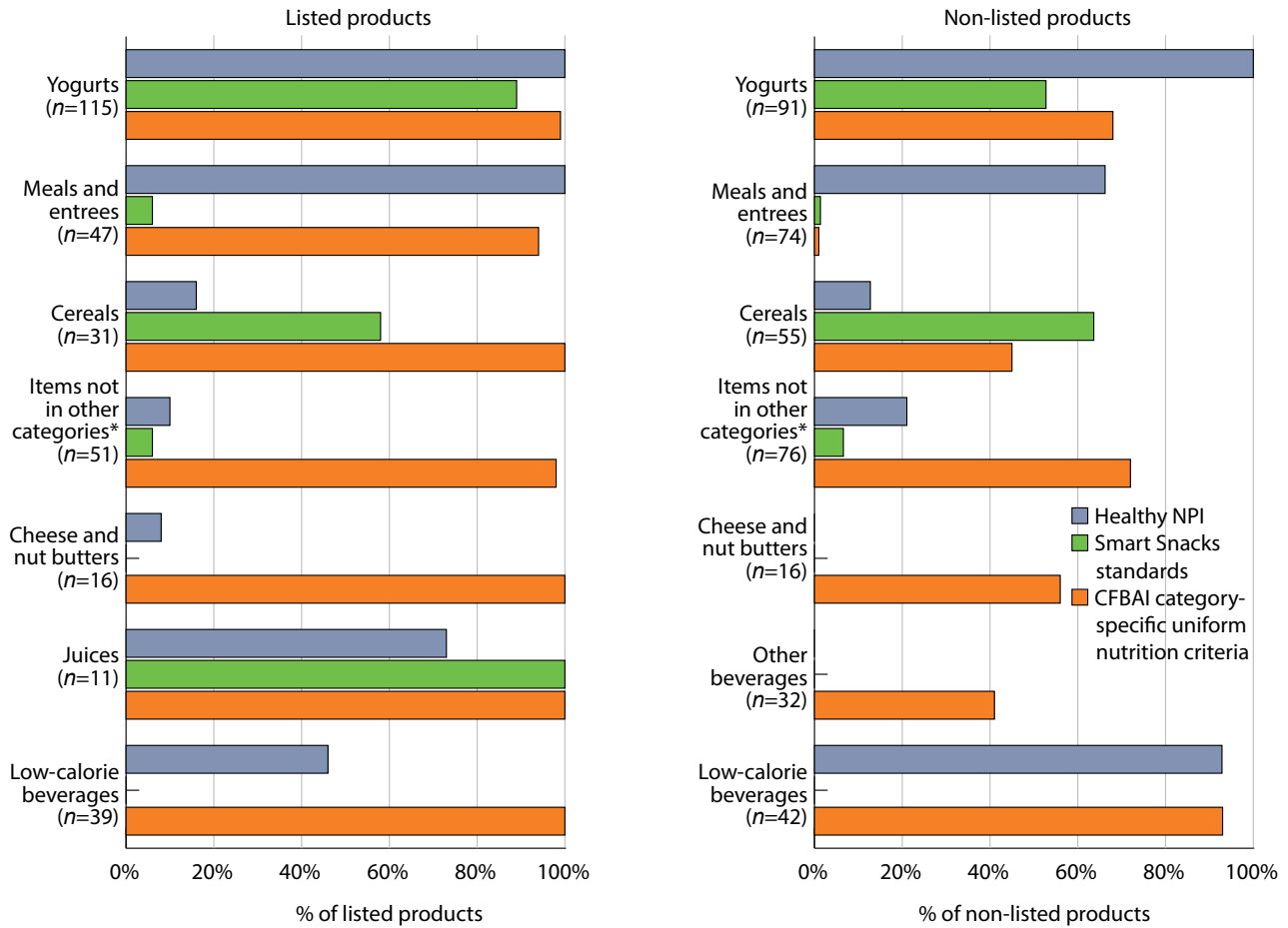
These analyses identify two main concerns about the CFBAI category-specific uniform nutrition criteria. First, there is wide variation between product categories in how well the criteria distinguish nutritious foods that should be marketed to children (as compared to Smart Snacks criteria and NPI scores). The second concern is the difference in nutrition quality of products included on CFBAI lists of products that may be advertised to children compared with non-listed products offered by the same brands that may not be featured in child-directed advertising. **Figure 16** shows the proportion of listed and non-listed products that met each nutrition criteria by category.

The CFBAI nutrition criteria for yogurts conformed with other nutrition standards, with the majority of listed yogurt products meeting Smart Snacks standards and NPI healthy food cut-

offs. Similarly, all listed juice products met Smart Snacks standards, and 77% met NPI healthy beverage cut-offs. In the meals and entrées categories, all listed products had healthy NPI scores, but only 6% met Smart Snacks standards due to high sodium, calories, and/or saturated fat per serving. Notably, many of these products would meet Smart Snacks standards if serving sizes were smaller.

However, listed products in other CFBAI categories were much less likely to meet Smart Snacks standards or qualify as healthy according to NPI scores, even though they met CFBAI category-specific uniform nutrition standards. Over half of listed breakfast cereals and products in other categories (cheese and nut butters) met Smart Snacks standards, but just 16% and 8%, respectively, had overall healthy NPI scores. Slightly less than one-half of low-calorie beverages met the NPI cut-off for healthy beverages, but all products in this category also contained non-nutritive sweeteners and therefore did not meet Smart Snacks standards for elementary schools. Listed products in the CFBAI “grains, vegetables, and items not in other categories” (excluding breakfast cereals) had the worst nutrition profile. This category included one vegetable product, as well as snack foods such as Pepperidge Farm Goldfish, Betty Crocker Fruit Snacks, and Popsicles. Although 98% of these products met CFBAI uniform nutrition criteria for this category, just 6% met Smart Snacks standards and 10% met the minimum NPI score to qualify as a healthy food.

Figure 16. Percent of listed and non-listed products meeting nutrition criteria by category



*Includes items in the CFBAI "Other grains, vegetables and items not in other categories" category, excluding cereals.

Source: Rudd Center nutrition analysis (2017)

The difference in nutritional quality for listed ($n=319$) versus non-listed ($n=386$) products from the same brands supports concerns that CFBAI companies may be promoting brands with primarily unhealthy products in their child-directed advertising. Nearly all listed products (98%) met the CFBAI nutrition criteria, whereas only half (54%) of non-listed products from the same brands met CFBAI standards. This difference was found in all CFBAI categories, but was greatest for the meal and entrée categories, where just 1% of non-listed products in all categories

met CFBAI nutrition criteria for the category. Furthermore, just 29% of non-listed products in all categories met Smart Snacks standards compared with 43% of listed products, and 49% of listed products met the NPI cut-off for healthy products, versus 63% of listed products. As noted previously by public health experts, this practice allows companies to advertise brands with nutritionally poor products directly to children, while still complying with their specific CFBAI pledges.⁹

Table 56. CFBAI top-50 non-listed brands: NPI scores and nutrient content per serving for all products

Company	Brand	# of products	NPI score		Total calories (kcal)		Total sugar (g)		Sodium (mg)		Sat fat (g)	
			Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)	Median	(Range)
General Mills	Yoplait Yogurt	79	68	(46-72)	150	(90-180)	18	(10-28)	95	(60-135)	1.0	(0.0-15)
PepsiCo	Lays	53	40	(20-58)	150	(130-160)	1	(0.6-12)	140	(45-290)	1.5	(0.5-4.5)
Kellogg Company	Pop Tarts	27	38	(32-42)	200	(190-210)	16	(12-19)	180	(160-300)	1.5	(1.5-2.5)

Source: Rudd Center nutrition analysis (2017)

Products from CFBAI company non-listed top-50 brands

In addition to products offered by CFBAI listed brands, we also examined the nutrient content of products offered by CFBAI non-listed brands that ranked in the top-50 brands with the most TV advertising viewed by children. This nutrition analysis did not include two fast food brands (McDonald's and Burger King) that also ranked in the top-50 non-listed brands, or three top-50 candy brands (Hershey's, Kit Kat, and Reese's Peanut Butter Cups), and one soda brand (Coca Cola) that offered only nutritionally poor products.

The three remaining non-listed top-50 brands analyzed offered 159 products. There was wide variation in the nutrition quality of these brands (see **Table 56**). Yoplait Yogurt had a healthy median NPI, with only one product (Yoplait Thick & Creamy Vanilla) that did not qualify as healthy. Lays potato chips were energy-dense (22 calories per gram) and had high concentrations of saturated fat and sodium, especially given the reported serving size of 1 ounce or about 15 chips. Pop Tarts pastries were also energy dense (17 calories per gram), with 32% of those calories from sugar. These pastries were also high in saturated fat and sodium.

Key findings

- As of January 2017, the eleven CFBAI companies with child-directed advertising listed 319 products that met the CFBAI category-specific uniform nutrition criteria and could be advertised to children. One-third of listed products were yogurts, while meals and entrees, fruit-flavored drinks, sweet and savory snacks, and breakfast cereals comprised another 50%. There was only one vegetable and no fruit products on the list (excluding fast food side items).
- The CFBAI category-specific uniform nutrition criteria's agreement with other expert standards to assess nutritional quality (i.e., NPI score and Smart Snacks nutrition standards) differed by CFBAI category. All CFBAI listed yogurts had healthy NPI scores and 89% met Smart Snacks standards for nutrients to limit. Listed meals and entrees had healthy NPI scores, but one-third did not meet Smart Snacks standards due to calories, saturated fat, and/or sodium that exceeded per serving limits. Most breakfast cereals (84%) did not have healthy NPI scores, but approximately 60% met Smart Snacks limits for serving sizes listed on nutrition facts panels. More than 80% of other grains and items not in other categories, cheese, and nut butters did not meet either NPI or Smart Snacks standards.
- The same brands also offered 386 products (55% of products offered by these brands) that were not included on companies' lists of products that may be advertised to children. These products were less likely to meet all three nutrition standards (including the CFBAI nutrition criteria). Categories with fewer listed than non-listed products included meals and entrees, other grains,

vegetables and items not in other categories (including breakfast cereals), and beverages.

Ages of children covered by CFBAI pledges

Public health experts have raised concerns about the age ranges of children covered by CFBAI pledges. The first concern is about advertising to preschool-age children. All participating companies (except McDonald's) have pledged that they will not direct any advertising to children under 6 years old, even for products that meet CFBAI nutrition criteria.¹⁰ However, as shown in the previous sections, preschoolers (ages 2 to 5) viewed on average 5.4 TV ads per day for CFBAI company brands in 2016, just 11% fewer ads compared with children (ages 6 to 11). In addition, public health experts have called on the CFBAI to expand the self-regulatory program to also cover advertising directed to young teens ages 12 to 14, who are still highly vulnerable to the influence of unhealthy food advertising.¹¹ In this section, we examine evidence of the need for CFBAI companies to expand their pledges to more effectively protect both younger and older children.

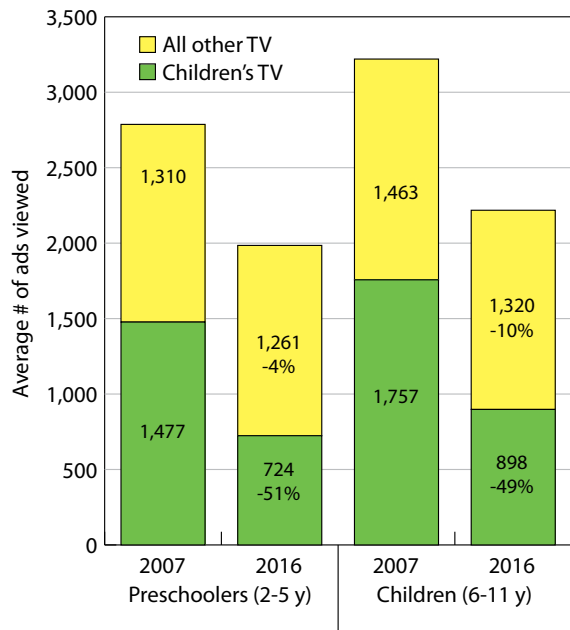
Protecting children under age 6

Not all _____ who have pledged to not advertise directly to children under 6 specify how they define advertising to children under 6. When specified in their pledges, companies have promised to not advertise in media where children ages 2 to 5 comprise 35% or more of the audience.¹² Our analysis of children's exposure to TV advertising on individual networks found just two networks where preschoolers were the primary audience: Sprout and Nickjr. Both networks describe themselves as "preschool" networks.^{13,14} Preschoolers viewed on average 60 food-related ads on these networks in 2016, compared with 15 ads viewed by children. Notably, all of these ads were placed by _____. Therefore, CFBAI companies appear to have complied with their pledges to not advertise in TV programming primarily directed to children under age 6.

Nevertheless, preschoolers watch largely the same TV programming as older children and thus view similar numbers and types of food advertising. A previous analysis of _____ on individual TV networks in 2011 showed that four networks contributed the greatest number of food advertisements viewed by both preschoolers (ages 2-5) and somewhat older children (ages 6-8): Nickelodeon, Cartoon Network, Nick-at-Nite, and ABC Family.¹⁵ However, only programming on Nickelodeon and Cartoon Network qualified as child-directed according to the CFBAI requirement that the program audience consist of 35% or more children under age 12.

Another concern raised by our results is that the difference in number of ads viewed by preschoolers relative to children has narrowed somewhat in recent years. In 2007, preschoolers

Figure 17. Changes in CFBAI company ads viewed on children's and other TV programming



Source: Rudd Center analysis of Nielsen data (2017)

viewed 13% fewer CFBAI company ads than did children compared with 11% fewer in 2016. The decline in CFBAI company TV ads viewed by preschoolers from 2007 to 2016 was also somewhat lower for preschoolers (-29%) than for children (-31%). As noted in the overview section, this discrepancy may be primarily due to somewhat lower declines in total amount of _____ for preschoolers (-15%) compared to children (-20%).

However, we also examined changes in exposure to TV advertising by CFBAI companies on _____ versus _____ (see **Figure 17**). CFBAI company ads viewed on children's TV declined by approximately 50% from 2007 to 2016 for both preschoolers and children. During this time, the difference in ads viewed by preschoolers versus children on children's TV widened; in 2007 preschoolers saw 16% fewer CFBAI company ads on children's TV compared with children, while they saw 19% fewer ads in 2016. In contrast,

this gap narrowed on other TV programming; preschoolers had seen 10% fewer ads in total on other TV in 2007 compared with children, but they saw just 4% fewer ads in 2016. Preschoolers' exposure to advertising by CFBAI companies on other TV programming also decreased by just 4% during this time, while children's exposure declined by 10%. Therefore, CFBAI company reductions in TV advertising on children's TV have benefited children under age 6 somewhat more than for children 6 to 11 years old, while reductions in TV advertising on other TV programming has had less benefit for preschoolers.

In addition, there was variation between companies in the difference between numbers of TV ads viewed by preschoolers and children on children's TV (see **Table 57**). Three of the four CFBAI companies with the most advertising on children's TV in 2016 had comparable ratios of ads viewed by preschoolers versus children: preschoolers saw approximately 15% fewer ads for General Mills, McDonald's, and Kellogg's products than children saw. However, preschoolers saw 28% fewer ads for Kraft Heinz products. Although the number of ads viewed changed dramatically from 2007 to 2016 for all companies – with some companies increasing ads viewed by both age groups (Kraft Heinz and McDonald's) and others decreasing their advertising (e.g., General Mills and Kellogg) – the ratios of ads viewed by preschoolers versus children on children's TV were comparable both years.

There was also considerable variation between companies in the ratio of ads viewed by preschoolers versus children on other types of TV programming. In addition, the number of ads viewed and _____ by preschoolers versus children on other TV programming changed considerably from 2007 to 2016 (see **Table 58**). For the majority of CFBAI companies, preschoolers viewed 4% to 10% fewer ads compared to children in 2016. However, there were some notable exceptions. Preschoolers viewed *more* ads for Campbell Soup, McDonald's, Mondelez, and Unilever products on other TV programming than children viewed, the same number of ads for Ferrero USA and Hershey products, and just 1% and 2% fewer ads for ConAgra Foods and Nestle products, respectively. In contrast, preschoolers viewed 12% fewer ads for Kellogg's products. In addition, for most companies, the difference between ads viewed by preschoolers and children has decreased since 2007.

Table 57. Differences in TV ads viewed by preschoolers and children on children's TV by CFBAI company

Company	2007			2016			Change in ads viewed by preschoolers (2007 to 2016)
	Avg # of ads viewed		Ttgd ratio Preschoolers vs. children	Avg # of ads viewed		Ttgd ratio Preschoolers vs. children	
	Preschoolers (2-5 y)	Children (6-11 y)		Preschoolers (2-5 y)	Children (6-11 y)		
General Mills	446.7	518.1	0.86	262.6	305.4	0.86	-41%
The Kraft Heinz Company	123.4	163.2	0.76	163.0	227.7	0.72	32%
McDonald's	99.1	115.8	0.86	135.2	156.0	0.87	36%
The Kellogg Company	358.7	411.2	0.87	70.7	85.2	0.83	-80%

Source: Rudd Center analysis of Nielsen data (2017)

Table 58. Differences in TV ads viewed by preschoolers and children on other TV programming by CFBAI company*

Company	2007			2016			TV ads viewed by preschoolers (2007 to 2016)
	Avg # of ads viewed		Ttgd ratio Preschoolers vs. children	Avg # of ads viewed		Ttgd ratio Preschoolers vs. children	
	Preschoolers (2-5 y)	Children (6-11 y)		Preschoolers (2-5 y)	Children (6-11 y)		
PepsiCo	152.9	184.7	0.83	186.6	198.8	0.94	22%
The Hershey Company	23.7	29.3	0.81	157.3	156.6	1.00	564%
General Mills	149.4	174.8	0.85	146.9	163.0	0.90	-2%
Mars	110.4	144.8	0.76	100.0	105.6	0.95	-9%
Burger King Corporation	39.0	51.5	0.76	93.6	101.0	0.93	140%
Kellogg Company	112.9	117.1	0.96	87.2	98.9	0.88	-23%
The Kraft Heinz Company	81.8	91.1	0.90	79.8	83.8	0.95	-3%
Nestle USA	142.3	131.9	1.08	76.6	78.2	0.98	-46%
The Coca-Cola Company	29.2	37.5	0.78	52.5	55.7	0.94	79%
Mondelez Global	75.0	88.7	0.84	49.6	45.9	1.08	-34%
McDonald's	138.9	152.1	0.91	48.1	47.2	1.02	-65%
Unilever	16.4	16.2	0.99	43.2	42.4	1.02	163%
The Dannon Company	59.0	55.6	0.94	37.5	40.8	0.92	-23%
Campbell Soup Company	112.4	114.4	0.98	30.2	29.5	1.02	-73%
ConAgra Foods	40.4	44.9	0.90	25.6	25.9	0.99	-37%
Post Foods	17.2	17.6	0.98	24.6	25.5	0.96	43%
Ferrero USA	9.2	10.6	0.87	21.4	21.5	1.00	133%

*Companies with >20 ads viewed by preschoolers on other TV programming

Source: Rudd Center analysis of Nielsen data (2017)

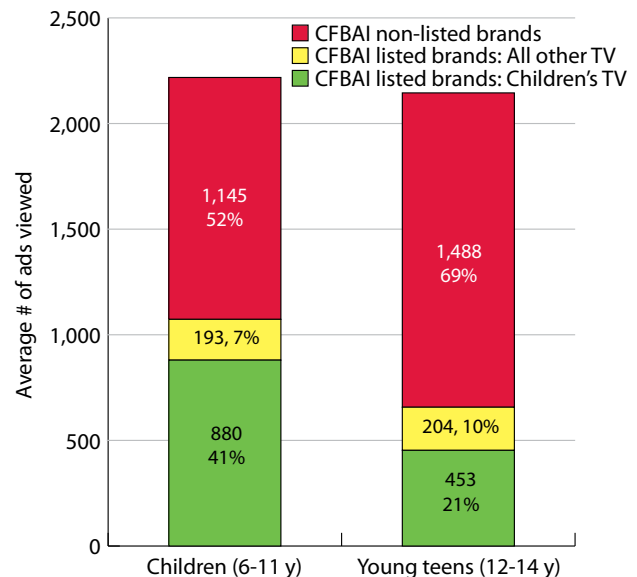
There were also notable increases in ads viewed by preschoolers on other types of TV programming from 2007 to 2016 by companies who pledged to not direct any advertising to children under age 12, including by 564% for Hershey, 133% for Ferrero USA, and 79% for Coca-Cola. Burger King advertising of other products (not Kid's Meal) viewed by preschoolers also increased 140% during this time.

In sum, we found no evidence that CFBAI companies advertised on the two preschool TV channels that accepted commercial advertising. However, we also found no evidence that companies have taken any additional steps to protect children under age 6 from exposure to their advertising. Furthermore, some of the improvements that CFBAI companies have made in advertising directed to children under age 12 have benefited preschoolers less than they have benefited children ages 6 to 11.

Advertising to children ages 12 to 14

Analysis of Nielsen data on CFBAI company TV advertising viewed by young teens (ages 12-14) compared with children (ages 6-11) provides further evidence that protections from exposure to unhealthy food advertising should extend to children up to at least 14 years old. Although young teens viewed 3% fewer CFBAI company TV ads in 2016 than children viewed, the composition of types of CFBAI brands advertised to each age group differed (see **Figure 18**). Approximately four of ten CFBAI company ads viewed by children were for listed brands on children's TV programming, compared with 21% of ads viewed by young teens. On the other hand, 69%

Figure 18. CFBAI company TV ads viewed by children and young teens by type of programming in 2016



Source: Rudd Center analysis of Nielsen data (2017)

of CFBAI company ads that young teens viewed were for products that were not approved for advertising to children, compared with 52% of ads viewed by children. Overall, young teens saw 39% fewer ads for _____ but 30% more ads for _____ compared with children.

Table 59. TV ads viewed for CFBAI non-listed brands that ranked in the top-50 for young teens but not children in 2016*

Company	Brand	Children (6-11 y)		Young teens (12-14 y)		Tgtd ratio
		Avg # TV ads viewed	Ranking in ads viewed	Avg # TV ads viewed	Ranking in ads viewed	Young teens vs. children
PepsiCo	Gatorade	13.9	59	26.8	35	1.59
PepsiCo	Mountain Dew	17.0	51	26.3	36	1.55
The Hershey Company	Ice Breakers	15.7	55	25.8	39	1.64
Mars	M&Ms	16.5	52	23.7	45	1.44
PepsiCo	Doritos	15.0	58	23.6	46	1.63
PepsiCo	Pepsi	16.7	54	23.6	47	1.57
PepsiCo	Cheetos	16.8	53	23.2	48	1.38
Mars	Wrigley's	15.4	57	23.0	49	1.49

*Excludes brands in top-50 ads viewed by children

Source: Rudd Center analysis of Nielsen data (2017)

Much of this difference can be attributed to young teens' lower viewing of children's TV programming. Nevertheless, young teens are exposed to significantly more advertising for CFBAI non-listed brands compared with children just a few years younger. In addition, it appears that some CFBAI brands placed disproportionately more of their advertising in TV programming aimed at young teens as evidenced by eight brands that ranked in the top-50 for TV ads viewed by young teens but not by children (see **Table 59**). These brands included one candy brand from Mars, two brands of breath mints from Mars and Hershey, and three sugary drinks and three snack foods from PepsiCo. For all these brands, young teens saw at least 45% more ads compared with children, with the biggest difference for Gatorade (68%). These differences are notable given that young teens spent 15% less time watching TV compared with children.

Key findings

- CFBAI companies appear to have kept their pledges to not advertise any products in media primarily directed to children under age 6 (i.e., preschool programming).
- However, these pledges do not appear to have led to improvements in advertising viewed by preschoolers relative to children. In 2016, preschoolers viewed just 11% fewer TV ads by CFBAI companies than did children. In 2007, preschoolers had viewed 13% fewer ads than children viewed.
- Furthermore, differences in ads viewed by preschoolers relative to children varied widely by CFBAI company, especially for advertising in other (not children's) TV programming. In 2016, preschoolers saw more ads on non-children's programming for Campbell Soup, McDonald's, Mondelez, and Unilever brands compared with children, equal numbers of Ferrero USA and Hershey ads, and just 1% to 2% fewer ads for ConAgra Foods and Nestle products.
- CFBAI company improvements in advertising to children under 12 have had limited benefit for young teens (ages 12-14), who viewed 39% fewer ads for CFBAI listed brands

than did children (ages 6-11), but 30% more ads for non-listed brands.

- As a result, young teens saw 45% to 68% more TV ads than children saw for candy, sugary drink, and snack food brands from CFBAI companies, as well as 32% more ads for fast food products from CFBAI companies that were not approved for advertising to children. Brands that appeared to target young teens directly as evidenced by the greatest discrepancy between ads viewed by young teens versus children included one candy brand, three sugary drinks, and three snack foods.

CCAI companies

In this section, we analyze companies that participated in the Children's Confection Advertising Initiative (CCAI) in 2016. The CCAI was established in 2016, and participating candy manufacturers have pledged not to advertise their products in media directed to children under age 12.¹⁶

Advertising spending

_____ companies spent just \$18 million combined in total _____ in 2016, down 33% from 2007 (see **Appendix Table A3**). _____ spending represented 60% of CCAI total spending in 2016. Of the eight companies participating in CCAI, three did not advertise in traditional media (Ferrara, RM Palmer, and Wolfgang), and two spent \$70,000 or less in 2016 (see **Table 60**).

Of the three remaining companies, Ghirardelli had the most advertising, spending almost \$14 million in total and \$8 million in English-language TV advertising in 2016. Jelly Belly spent \$4 million in total. Just Born Quality Confections spent \$193,000, but did not advertise on TV in 2016. Notably, the company had significantly more advertising in previous years before the CCAI pledges were implemented, spending \$6.6 million in total and \$4.6 million in English-language TV advertising in 2013. Jelly Belly was the only CCAI company to increase ad spending from 2013 to 2016, more than doubling its spending from 2013 to 2016.

Table 60. Advertising spending by CCAI companies in 2016

Company	Total ad spending (\$ mil)	TV % of total*	Change in total spending from 2007
Ghirardelli Chocolate	\$13.9	58%	-38%
Jelly Belly Candy Company	\$4.2	71%	16%
Just Born Quality Confections	\$0.2	0%	-87%
The Promotion in Motion Companies	\$0.1	0%	0%
Brown & Haley	< \$0.1	0%	-32%

*English-language TV advertising

Source: Rudd Center analysis of Nielsen data (2017)

TV advertising to children

Children also viewed small numbers of TV ads by CCAI companies in all years examined (see **Appendix Table B5**). Furthermore, _____ for CCAI companies declined by

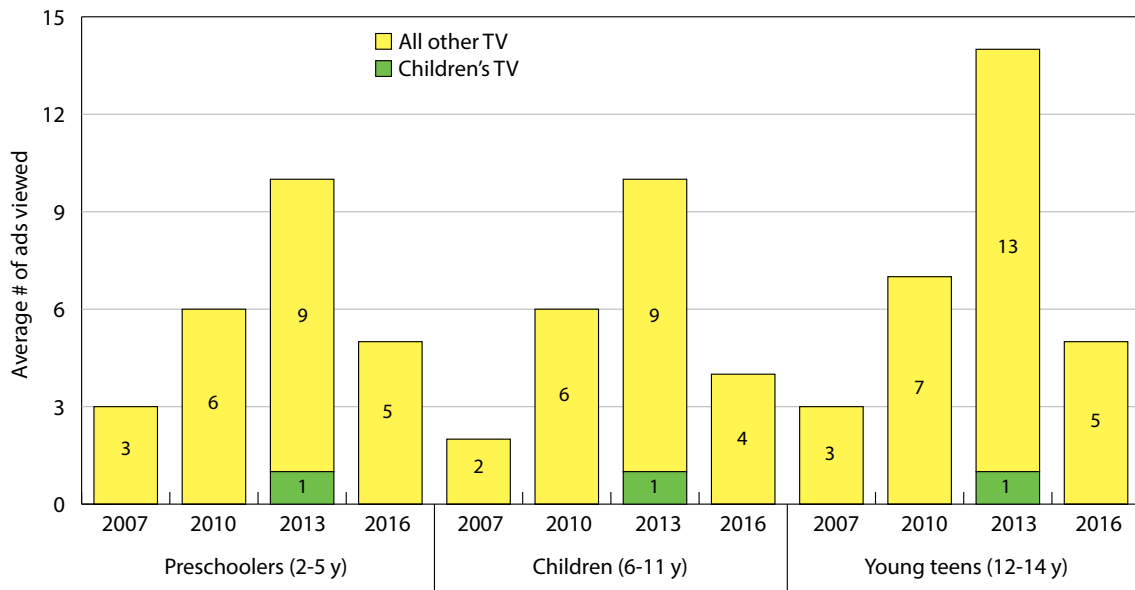
approximately 60% from 2007 to 2016 for preschoolers and young teens, and by almost 50% for children (6-11 years) (see **Figure 19**).

In 2016, only Ghirardelli and Jelly Belly advertised their products on any type of TV programming, but the numbers were very low (see **Table 61**). In all years examined, Just Born was the only CCAI company to advertise on _____ in any year examined (approximately 1 ad viewed in 2013) (see **Appendix Table B6**). However, from 2013 to 2016, the company substantially reduced its total advertising spending and did not advertise on TV at all in 2016.

Digital marketing

The two CCAI companies that advertised on TV in 2016 were also the only companies with _____ on _____ in 2016: Ghirardelli Chocolate and Jelly Belly (see **Table 62**). As with TV advertising, the number of ads appearing on kids' websites for both companies was low. However, Jelly Belly also placed more than 2 million ads on Facebook, which represented 18% of all banner ads for the company.

Figure 19. Changes in TV advertising viewed by children for CCAI companies



Source: Rudd Center analysis of Nielsen data (2017)

Table 61. TV advertising viewed by children for CCAI brands in 2016

Company	Preschoolers (2-5 y)			Children (6-11 y)			Young teens (12-14 y)		
	Avg # of ads viewed	Tgtd ratio vs adults (18-49 y)	Change in ads viewed from 2007	Avg # of ads viewed	Tgtd ratio vs adults (18-49 y)	Change in ads viewed from 2007	Avg # of ads viewed	Tgtd ratio vs adults (18-49 y)	Change in ads viewed from 2007
Ghirardelli Chocolate	3.3	0.42	15%	2.7	0.34	32%	3.4	0.34	4%
Jelly Belly Candy Company	1.7	0.58	**	1.6	0.56	**	1.6	0.56	**

**No ads viewed in 2007

Source: Rudd Center analysis of Nielsen data (2017)

Table 62. Banner ads placed by CCAI companies on kids' and social media websites in 2016

Company	Kids' websites		Social media sites*		
	# of ad impressions (000)	% of brand impressions	# of ad impressions on Facebook (000)	# of ad impressions on YouTube (000)	% of brand impressions
Ghirardelli Chocolate	161	1%	542	348	3%
Jelly Belly Candy Company	21	<1%	2,270	45	18%

*Facebook and YouTube

Source: comScore Ad Metrix Advertiser report (January-December 2016)

Table 63. Youth visitors to CCAI company websites in 2016

Company	Website	Avg monthly unique visitors (000)		% of total unique visitors	
		Children (2-12 y)	Teens (13-17 y)	Children (2-12 y)	Teens (13-17 y)
Ghirardelli	Ghirardelli.com	6.1	2.8	9%	4%
Jelly Belly Candy Company	JellyBelly.com	0.8	5.1	1%	8%

Source: comScore Ad Metrix Advertiser report (January-December 2016)

These same two companies were also the only ones that had _____ with enough child visitors to measure in comScore (see **Table 63**). At Ghirardelli.com, 9% of visitors were ages 2 to 12, which was comparable to the 10% of total visitors to the internet in this age group. In contrast, only 1% of visitors to JellyBelly.com were children, while 8% of its visitors were teens (ages 13 -17). For both websites, the total number of youth visitors (under age 18) averaged 7,000 to 8,000 per month.

In contrast to more _____, CCAI companies were more _____ (see **Table 64**). All eight CCAI companies maintained active _____ in 2016, but only Ghirardelli and Welch's Fruit Snacks (The Promotion in Motion Companies) had more than 1 million _____. Fewer CCAI companies had _____ (n=4) or _____ (n=5). Welch's Fruit Snacks was the most popular and active Twitter account with just 87,000 _____ and 842 _____ in 2016. Both Ghirardelli and Jelly Belly had more than 25,000 _____

Table 64. Popular social media accounts for CCAI companies* in 2016

Company	Brand	Facebook		Twitter		Instagram	
		Fans (000)***	Posts	Followers (000)***	Tweets	Followers (000)***	Posts
Ghirardelli Chocolate	Ghirardelli	1,568	264	16	397	31	244
The Promotion in Motion Companies	Welch's Fruit Snacks	1,112	272	87	842	**	**
Jelly Belly Candy Company	Jelly Belly	675	91			26	56
The Promotion in Motion Companies	Sour Jacks	649	323	**	**	**	**

Company	Account name	YouTube	
		Video views (000)	Videos uploaded
Ghirardelli Chocolate	GhirardelliDigital	5,925	36
The Promotion in Motion Companies	MyWelchsFruitSnacks	1,727	2
Jelly Belly Candy Company	JellyBelly	697	12

*Includes accounts with 500,000 or more fans or followers on any social media platform

**Account active in 2016, but data not available

***As of December 31, 2016

Source: Rudd Center analysis of Unmetric data (January – December 2016)

_____. Three CCAI companies also maintained active YouTube accounts. As with Facebook and Twitter, _____ for Ghirardelli and Welch's Fruit Snacks had the most _____, including almost 6 million views for Ghirardelli Digital.

Key findings

- CCAI companies have kept their pledges not to advertise in media directed to children under 12. In 2016, Ghirardelli Chocolate and Jelly Belly were the only CCAI companies that advertised on any TV or on third-party kids' websites. These companies also attracted the most children to their websites. However, most CCAI companies also had little or no advertising in any media before their pledges were implemented.
- The CCAI appears to have had differing outcomes for the three companies with TV advertising in 2013 (prior to CCAI implementation). From 2013 to 2016, Ghirardelli Chocolate and Just Born substantially reduced their total ad spending and TV advertising viewed by children. Notably, Just Born was the only company that appeared to target children with advertising on children's TV in 2013. On the other hand, Jelly Belly more than doubled its total advertising spending from 2013 to 2016, and the number of TV ads viewed by children increased (although the numbers are small).
- In contrast to their limited presence in traditional media, all CCAI companies maintained at least one active social media account in 2016. Welch's Fruit Snacks, which did not advertise in traditional media in 2016, maintained popular and active social media accounts.

ADVERTISING BY NON-PARTICIPATING COMPANIES

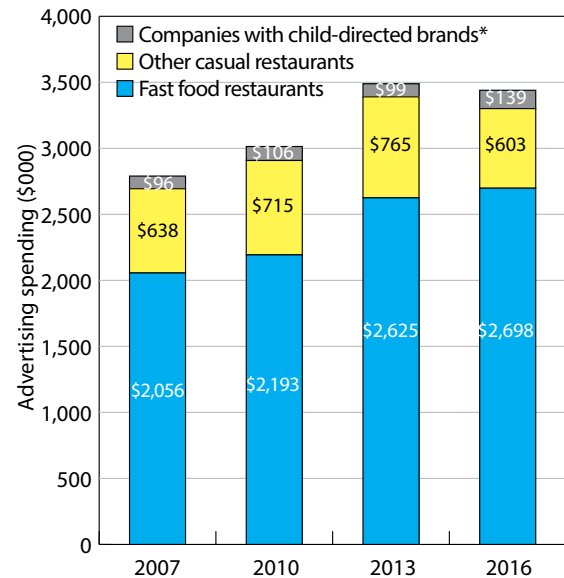
In this section we examine advertising by 24 companies that did not participate in the CFBAI or CCAI, but had brands that ranked among the 50 brands with the most TV advertising viewed by children in 2016. Total advertising spending by non-participating companies with top-50 brands exceeded \$3.4 billion in 2016, one-quarter of all food-related advertising spending. These companies also were responsible for approximately 30% of all food-related TV ads viewed by children in 2016. In this section, we also examine six additional companies that advertised healthy brands to children in 2016.

Companies with top-50 brands

_____ included 12 fast food restaurants, nine casual restaurants, two candy, and one cheese manufacturer (see **Table 65**). Seven of these companies had at least one child-directed brand, as evidenced by advertising on _____ and high _____ by children relative to adults.¹ Sonic and Subway appeared to direct kids' meal advertising to children, but not advertising for their other products.

Fast food restaurants (excluding kids' meals) spent \$2.7 billion on advertising in 2016, 78% of all spending by these companies (see **Figure 20**). _____ for other casual restaurants totaled \$600 million, while companies

Figure 20. Total advertising spending by non-participating top-50 companies



*Totals for companies with child-directed brands include Subway and Sonic kids' meals. Kids' meals were not included in fast food restaurants numbers.

Source: Rudd Center analysis of Nielsen data (2017)

with child-directed brands spent \$139 million (see **Appendix Table A4**). For these companies combined, 87% of their spending was devoted to TV advertising.

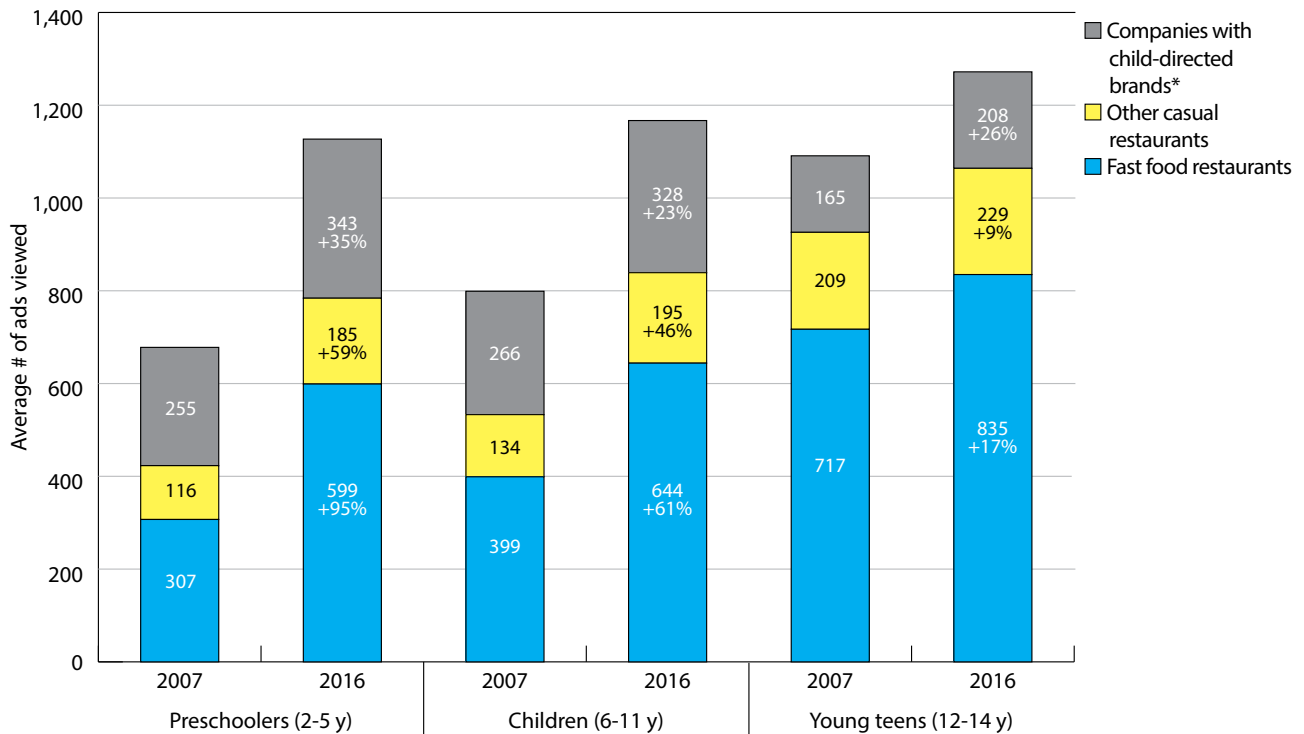
From 2007 to 2016, total advertising spending by fast food restaurants increased by \$640 million, up 31%. Although total spending by companies with child-directed brands was

Table 65. Non-participating companies with top-50 brands

Company	Child-directed brand	Company	Child-directed brand
Fast food restaurants		Other casual restaurants	
Arby's		Applebee's Grill & Bar	
Dairy Queen		Chili's Grill & Bar	
Domino's Pizza		Chuck E. Cheese's	✓
KFC		Dave & Buster's	✓
Little Caesars		Denny's Restaurant	
Papa John's		Golden Corral Restaurant	
Pizza Hut		Olive Garden	
Popeye's		Outback Steakhouse	
Sonic kids' meals	✓	Red Lobster	
Sonic other products			
Subway kids' meals	✓	Food manufacturers	
Subway other products		Perfetti Van Melle (candy)	✓
Taco Bell		The Bel Group (cheese)	✓
Wendy's		The Topps Company (candy)	✓

Source: Rudd Center analysis of Nielsen data (2017)

Figure 21. Changes in TV ads viewed by age group for non-participating companies with top-50 brands



*Totals for companies with child-directed brands include Subway and Sonic kids' meals. Kids meals were not included in fast food restaurants totals.
Source: Rudd Center analysis of Nielsen data (2017)

considerably lower, advertising by companies with child-directed brands showed the greatest percent increase, growing 45% from 2007 to 2016. In contrast, ad spending by other casual restaurants declined by 6% during this time.

Non-participating companies with top-50 brands were responsible for two to three TV _____ per day on average by children in all age groups (see **Figure 21**). Fast food restaurants (excluding kids' meals) represented approximately 55% of ads viewed by preschoolers and children from non-participating companies and two-thirds of ads viewed by young teens. Approximately 30% of ads viewed by preschoolers and children for these companies promoted child-directed brands, although child-directed brands represented just 16% of ads viewed by young teens, who saw somewhat more ads for other casual restaurants.

From 2007 to 2016, exposure to TV advertising by non-participating fast food companies with top-50 brands increased the most for preschoolers and children (95% and 61%, respectively). In contrast, fast food advertising to young teens increased by just 17%. Similarly, despite a decline in advertising spending by other casual restaurants, exposure to TV advertising for these companies increased by 59% and 46% for preschoolers and children, respectively, compared with just 9% for young teens. These trends indicate a potential increased focus by fast food and casual restaurants on advertising to reach a younger audience. TV advertising for companies with child-directed brands also increased substantially for children in all age groups, although at somewhat lower rates.

Companies with child-directed brands

Of the seven _____ in 2016, The Bel Group spent the most, nearly \$50 million, 99.9% of which was devoted to three child-directed brands (see **Table 66**). Two child-directed casual restaurants, Chuck E. Cheese's and Dave & Buster's, spent another \$51 million combined. The two candy companies differed in how much of their advertising was devoted to child-directed brands. The Topps Company spent almost three-quarters of its advertising budget (\$8.1 million) on three child-directed brands, while Perfetti Van Melle spent one-third of its budget (\$6.8 million) on Airheads, its only child-directed brand. Of the two non-participating fast food restaurants with child-directed advertising, Subway spent the most (\$6.8 million) to advertise its kids' meals, which was less than 2% of its total budget, while Sonic spent only \$146,000 to advertise its kids' meals. The majority of companies dedicated more than 80% of 2016 ad dollars for their child-directed brands to English-language TV advertising. However, Subway dedicated 70% of its kids' meal ad spending to Spanish-language TV advertising. Chuck E. Cheese's and Mini Babybel also allocated 28% and 18% of their spending, respectively, to advertising on Spanish-language TV; and Mini Babybel spent 23% of its ad budget on magazine advertising.

All but one child-directed brand increased its total advertising spending from 2007 to 2016. Five brands more than doubled their spending (Mini Babybel, Juicy Drop Candy, Ring Pop, Laughing Cow, and Dave & Buster's), while another three

Table 66. Advertising spending by non-participating company child-directed brands in 2016

Company	Brand	Total ad spending (\$ mil)	TV % of total*	Change in total ad spending from 2007
Chuck E. Cheese's		\$28.0	71%	24%
The Bel Group	Mini Babybel	\$27.2	58%	567%
Dave & Buster's		\$22.8	98%	100%
The Bel Group	Laughing Cow	\$12.1	100%	110%
The Bel Group	Laughing Cow Cheese Dippers Snacks	\$9.4	100%	**
Subway	Kids' meals	\$6.8	30%	-83%
Perfetti Van Melle	Airheads	\$6.8	99%	74%
The Topps Company	Juicy Drop Candy	\$3.8	100%	355%
The Topps Company	Crunchkins	\$2.5	100%	**
The Topps Company	Ring Pop	\$1.7	100%	123%
Sonic	Kids' meals	\$0.1	100%	**

The Bel Group, The Topps Company, and Perfetti Van Melle also allocated ad dollars to brands that were not child-directed and are not listed here.

*English-language TV advertising only

**No spending in 2007

Source: Rudd Center analysis of Nielsen data (2017)

brands with child-directed advertising in 2016 had not advertised in 2007 (Laughing Cow Cheese Dippers Snacks, Crunchkins, and Sonic kids' meals). Subway kids' meals was the only child-directed brand to reduce its total ad spending from 2007 to 2016 (-83%).

Table 67 and **Appendix Table B7** detail the _____ for child-directed brands in 2016. Chuck E. Cheese's aired by far the most TV advertising, with 147 and 109 ads viewed by preschoolers and children, respectively. The three Topps candy brands contributed an additional 70 and 89 ads viewed by children in these age groups. In most

Table 67. TV ads viewed for non-participating company child-directed brands in 2016

Company	Brand	Preschoolers (2-5 y)				Children (6-11 y)				Young teens (12-14 y)			
		Avg # of TV ads viewed (18-49 y)	Tgtd ratio vs adults (18-49 y)	% viewed on children's TV	% Change in ads viewed from 2007	Avg # of TV ads viewed (18-49 y)	Tgtd ratio vs adults (18-49 y)	% viewed on children's TV	% Change in ads viewed from 2007	Avg # of TV ads viewed (18-49 y)	Tgtd ratio vs adults (18-49 y)	% viewed on children's TV	% Change in ads viewed from 2007
Chuck E. Cheese's		147.1	4.42	88%	-17%	108.6	3.26	87%	-36%	58.5	1.76	83%	-32%
The Topps Company	Juicy Drop Candy	37.0	4.22	88%	520%	47.6	5.43	86%	515%	26.0	2.97	83%	528%
Dave & Buster's		20.8	0.79	55%	390%	24.0	0.91	55%	344%	21.8	0.83	31%	56%
Perfetti Van Melle	Airheads	17.4	1.67	64%	-38%	22.7	2.17	61%	-29%	17.7	1.69	42%	0%
The Topps Company	Crunchkins	17.4	3.16	89%	**	21.8	3.95	87%	**	13.3	2.42	76%	**
The Topps Company	Ring Pop	15.8	4.11	99%	172%	20.0	5.21	100%	157%	11.1	2.90	99%	173%
Subway	Kids' meals	11.8	4.70	95%	34%	16.4	6.55	96%	57%	9.2	3.70	95%	-51%
The Bel Group	Laughing Cow	16.5	1.81	71%	**	8.1	0.88	48%	**	5.9	0.65	29%	**
The Bel Group	Mini Babybel	15.1	1.65	69%	727%	7.6	0.83	49%	330%	5.7	0.62	28%	187%
The Bel Group	Laughing Cow Cheese Dippers Snacks	10.6	1.54	65%	**	5.3	0.77	41%	**	4.0	0.58	20%	**
Sonic	Kids' meals	0.8	5.83	99%	**	0.8	5.59	99%	**	0.3	2.33	99%	**

The Bel Group, The Topps Company and Perfetti Van Melle advertised brands that were not child-directed and are not listed here.

**No ad exposure in 2007

Source: Rudd Center analysis of Nielsen data (2017)

Table 68. TV ads viewed for child-directed brands on preschool channels in 2016

Company	Brand	Avg # of ads viewed	
		Preschoolers (2-5 y)	Children (6-11 y)
Chuck E. Cheese's		23.5	5.6
The Bel Group	Laughing Cow Cheese	11.0	2.6
	Laughing Cow Cheese Dippers	6.7	1.7
	Mini Babybel	9.5	2.3

Source: Rudd Center analysis of Nielsen data (2017)

cases, children viewed more ads for child-directed brands than preschoolers viewed, but there were some exceptions. Preschoolers saw more ads than any other age group for Chuck E. Cheese's and the three Bel Group brands. Young teens saw fewer ads for all child-directed brands compared with children. However, compared with preschoolers, young teens viewed approximately the same number of ads for Dave & Buster's and Airheads.

Preschoolers, children, and young teens viewed 276, 254, and 133 ads, respectively, for non-participating companies' child-directed brands on children's TV in 2016, which was approximately 80% of all ads viewed for these brands (see **Appendix Table B8**). However, 86% or more of ads viewed for Chuck E. Cheese's, Subway and Sonic kids' meals, and all Topps brands appeared on children's TV, while a lower proportion of ads viewed for Bel brands, Airheads, and Dave & Buster's appeared on children's TV.

From 2007 to 2016, TV advertising viewed by children increased for the majority of child-directed brands, with some differences between brands by age group. Chuck E. Cheese's ads viewed by children and young teens dropped by 36% and 32%, respectively, compared to a decline of just 17% for preschoolers. Exposure to Airheads ads decreased for preschoolers and children (by 38% and 29%, respectively), but not for young teens. In contrast, young teens viewed fewer ads for Subway kids' meals (-51%) in 2016 than they did in 2007, while ads viewed by preschoolers and children increased.

On children's TV, the number of ads viewed by preschoolers and children for these brands on children's TV increased by 36% and 27%, respectively, from 2007 to 2016. Notably, the majority of brands that advertised on children's TV in 2016 had not advertised there in 2007, including Dave & Buster's, Sonic kids' meals, all Bel brands, and Crunchkins. Topps' Juicy Drop Candy and Ring Pop had a limited presence on children's TV in 2007, but advertising on children's TV for both brands more than doubled by 2016.

Of note, 16% of ads for Chuck E. Cheese's and two-thirds of Bel Group brands' ads were viewed by preschoolers on children's TV _____, including Nickjr. (70% of these ads) and Sprout (30% of these

ads) (see **Table 68**). As would be expected, preschoolers viewed more ads on preschool channels compared with children, while adults viewed on average less than 2 ads each for Chuck E. Cheese's and all Bel Group brands.

Fast food and other casual restaurants

All non-participating top-50 companies that did not have child-directed brands were fast food or casual restaurants (see **Table 69**). In this section, we also include advertising for Subway and Sonic products that were not child-directed (i.e., not kids' meals). Five fast food restaurants accounted for one-half of total advertising spending by these companies in 2016 (Subway, Taco Bell, Domino's Pizza, Sonic, and Wendy's). Another five fast food and two casual restaurants spent more than \$100 million each in total advertising. Only two of these restaurants, Popeye's and Denny's, allocated less than 80% of their total spending to English-language TV advertising. Of note, both devoted 20% of their ad budgets to Spanish-language TV advertising.

From 2007 to 2016, all but three of these fast food restaurants increased their _____. Little Caesars had the biggest increase (\$151 million), while Popeye's advertising increased four-fold and both Domino's Pizza and Dairy Queen advertising almost doubled during this time. Four of the seven casual restaurants also increased their ad spending from 2007 to 2016, but at lower rates. Golden Corral had the biggest increase at 77%.

Table 69. Advertising spending by non-participating fast food and other casual restaurants in 2016

Company	Total ad spending (\$ mil)	TV % of total*	Change in total ad spending from 2007
Subway (excluding kids' meals)	\$457.5	84%	35%
Taco Bell	\$339.5	84%	38%
Domino's Pizza	\$277.1	86%	96%
Sonic (excluding kids' meals)	\$242.0	92%	47%
Wendy's	\$230.7	76%	-22%
KFC	\$204.2	91%	-29%
Pizza Hut	\$203.0	95%	-14%
Papa John's	\$165.2	89%	60%
Little Caesars	\$161.7	83%	1466%
Arby's	\$150.3	96%	18%
Popeye's	\$139.0	77%	293%
Olive Garden	\$130.7	89%	4%
Dairy Queen	\$127.4	99%	93%
Applebee's Grill & Bar	\$122.8	86%	-20%
Chili's Grill & Bar	\$96.1	90%	26%
Red Lobster	\$79.4	99%	-33%
Outback Steakhouse	\$70.0	91%	-18%
Denny's Restaurant	\$61.4	76%	12%
Golden Corral Restaurant	\$42.4	92%	77%

*English-language TV advertising only

Source: Rudd Center analysis of Nielsen data (2017)

Table 70. TV ads viewed for non-participating fast food and other casual restaurants in 2016

Company	Preschoolers (2-5 y)				Children (6-11 y)				Young teens (12-14 y)			
	Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)	% Change viewed on children's TV	% Change in ads viewed from 2007	Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)	% Change viewed on children's TV	% Change in ads viewed from 2007	Avg # of TV ads viewed	Tgtd ratio vs adults (18-49 y)	% Change viewed on children's TV	% Change in ads viewed from 2007
Domino's Pizza	73.5	0.47	0%	206%	78.9	0.50	0%	166%	97.2	0.62	0%	68%
Taco Bell	69.1	0.40	0%	70%	74.8	0.44	0%	30%	110.3	0.65	0%	-4%
Sonic (excluding kids' meals)	59.6	0.47	9%	144%	65.5	0.51	13%	51%	82.9	0.64	6%	1%
Subway (excluding kids meals)	56.7	0.44	2%	45%	64.0	0.51	8%	102%	82.9	0.65	3%	31%
Wendy's	67.9	0.47	12%	91%	73.5	0.50	2%	22%	92.1	0.64	1%	-17%
Little Caesars	54.2	0.43	0%	**	58.4	0.46	0%	**	72.6	0.58	0%	**
Pizza Hut	53.2	0.46	0%	6%	57.9	0.51	0%	1%	75.8	0.66	0%	1%
Applebee's Grill & Bar	36.1	0.42	0%	45%	39.8	0.46	0%	41%	47.8	0.56	0%	21%
Olive Garden	40.2	0.45	0%	43%	40.2	0.45	0%	21%	46.2	0.52	0%	-13%
KFC	36.7	0.41	0%	-32%	38.0	0.42	0%	-44%	52.0	0.57	0%	-54%
Arby's	34.7	0.48	0%	202%	37.9	0.53	0%	150%	52.4	0.73	0%	74%
Dairy Queen	34.2	0.41	0%	120%	34.9	0.42	0%	51%	42.8	0.52	0%	2%
Popeye's	29.9	0.48	0%	1783%	34.0	0.55	0%	1293%	41.3	0.66	0%	789%
Papa John's	29.4	0.48	10%	177%	26.5	0.44	3%	110%	33.0	0.54	1%	37%
Chili's Grill & Bar	23.7	0.43	0%	66%	26.5	0.48	0%	36%	34.3	0.62	0%	-5%
Denny's Restaurant	20.7	0.55	4%	33%	24.4	0.65	4%	29%	28.9	0.76	2%	-2%
Outback Steakhouse	21.6	0.45	0%	223%	23.0	0.47	0%	217%	25.9	0.53	0%	140%
Red Lobster	22.3	0.40	0%	-15%	21.2	0.38	0%	-20%	24.1	0.44	0%	-41%
Golden Corral Restaurant	19.9	0.45	0%	**	20.1	0.45	0%	**	21.4	0.49	0%	**

**No ad exposure in 2007

Source: Rudd Center analysis of Nielsen data (2017)

Although less than 2% of these ads appeared on _____, children in all age groups viewed large numbers of TV ads for _____ on other TV programming (see **Table 70**). Preschoolers and children averaged more than 50 ads viewed each for Domino's, Taco Bell, Sonic, Subway, Wendy's, Little Caesars, and Pizza Hut in 2016, while young teens averaged 73 or more ads viewed for the same fast food restaurants. However, some fast food restaurants did advertise some products that were not kids' meals on children's TV, including Sonic, Subway, Wendy's, and Papa John's. Preschoolers also viewed Papa John's ads on _____ networks. Denny's was the only casual restaurant that did not qualify as child-directed with some advertising on children's TV.

From 2007 to 2016, exposure to TV advertising increased for the majority of non-participating fast food and other casual restaurants, with the greatest increases in ads viewed by preschoolers and children. For these age groups, ad exposure more than doubled for Domino's Pizza, Sonic, Arby's, Papa John's, and Outback Steakhouse. Increases in ad exposure were even greater for preschoolers than for children for nearly all fast food and casual restaurants, including Wendy's (91% vs. 51%) and Dairy Queen (120% vs. 51%). Notable increases in ads viewed by young teens included a seven-fold increase

for Popeye's, and ads viewed for Outback Steakhouse almost doubled. TV advertising for just one fast food and one casual restaurant (KFC and Red Lobster) decreased for preschoolers and children, while young teens viewed fewer ads for seven of the 19 fast food and casual restaurants.

Digital marketing

Non-participating fast food and other casual restaurants were some of the most popular and active companies in marketing to youth online and through social media platforms. By comparison, most child-directed brands had less marketing in digital media.

Banner advertising on third-party websites

Of the 11 child-directed brands analyzed, just four placed ads on _____ in 2016 (see **Table 71**). Chuck E. Cheese's placed more _____ on kids' websites than other child-directed brands (1.5 million), but these brands placed less than 2% of their banner ads on kids' websites. These brands all placed a somewhat higher proportion of their banner ads on _____, led by Chuck E.

Table 71. Banner ads placed by child-directed brands from non-participating companies in 2016

Company	Brand	Kids' websites		Social media sites		
		# of ad impressions (000)	# of ad % of total brand impressions	# of ad impressions on Facebook (000)	impressions on YouTube (000)	% of total brand impressions*
Chuck E. Cheese's		1,523	2%	5,799	1,125	9%
Subway	Kids' meals	102	<1%	2,041	122	6%
The Bel Group	Babybel	34	1%	263	0	6%
Perfetti Van Melle	Airheads	31	<1%	357	78	4%

*Facebook and YouTube

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Cheese's with almost 7 million ads, representing 9% of its total banner ads. Child-directed brands placed more than six times as many ads on Facebook than on YouTube.

On the other hand, 13 of the 19 fast food and other casual restaurants placed banner ads on _____ in 2016 (see **Table 72**). The percent of restaurants' total ads placed on kids' websites was low (2% or less), but three fast food and one casual restaurant placed more than 5 million ads each, including Pizza Hut, Papa John's, and Olive Garden.

Non-participating fast food and other casual restaurants also placed a much higher proportion of their banner ads on social media sites, including 61% of Wendy's ads and more than 30% of ads by Taco Bell, Applebee's, and Papa John's. Some of these restaurants also placed high numbers of ads on social media sites in 2016, including 150 million ads for Papa John's and more than 40 million ads each for Pizza Hut, Applebee's Grill & Bar, and Subway on Facebook. On the other hand, Wendy's and Taco Bell placed the most ads on YouTube (45

million and 39 million, respectively). Notably, non-participating fast food and other casual restaurants placed more banner ads on social media sites compared with all other types of companies in our analysis, and they also placed the highest proportion of their ads on social media (15%).

Non-participating company websites

In 2016, just three child-directed brands from non-participating companies sponsored _____ with enough child visitors (ages 2-12) to obtain exposure data from comScore (see **Table 73**). As found with display ads on third-party websites, Chuck E. Cheese's attracted the most _____, averaging 139,000 visits per month, which was the most visitors for any of the non-participating company sites in our analysis. Notably, 42% of visitors to ChuckE Cheese.com and 30% of visitors to SubwayKids.com were children under age 13.

Table 72. Banner ads placed by non-participating fast food and other casual restaurants in 2016

Company	Kids' websites		Social media sites		
	# of ad impressions (000)	% of total brand impressions	# of ad impressions on Facebook (000)	# of ad impressions on YouTube (000)	% of total brand impressions*
Pizza Hut	11,290	1%	72,005	6,055	9%
Papa John's	8,762	2%	149,971	6,244	31%
Olive Garden	5,047	2%	17,674	3,462	8%
Subway (all products, excluding kids' meals)	4,343	1%	40,893	7,183	7%
Wendy's	1,310	2%	1,268	45,126	61%
Denny's Restaurant	641	1%	3,808	591	5%
KFC	248	<1%	11,445	12,660	11%
Pizza Hut	186	1%	1,056	76	5%
Red Lobster	176	<1%	205	79	1%
Applebee's Grill & Bar	174	<1%	42,159	632	35%
Outback Steakhouse	98	<1%	1,202	5,966	13%
Taco Bell	57	<1%	2,630	38,976	37%
Dairy Queen	33	<1%	522	2,314	22%

*Includes Facebook and YouTube

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Table 73. Youth visitors to websites for non-participating company child-directed brands in 2016

Company	Website	Avg monthly unique visitors (000)		% of total unique visitors	
		Children (2-12 y)	Teens (13-17 y)	Children (2-12 y)	Teens (13-17 y)
Chuck E Cheese's	ChuckE Cheese.com	139.4	16.8	42%	5%
Dave & Buster's	DaveAndBusters.com	7.8	10.1	4%	6%
Subway	SubwayKids.com	6.0	0.8	30%	4%

Source: comScore Media Metrix Key Measures report for children & teens (January - December 2016)

Table 74. Youth visitors to websites for non-participating fast food and other casual restaurants* in 2016

Company	Website	Avg monthly unique visitors (000)		% of total unique visitors	
		Children (2-12 y)	Teens (13-17 y)	Children (2-12 y)	Teens (13-17 y)
Pizza Hut	PizzaHut.com	137.8	134.3	5%	5%
Domino's Pizza	Dominos.com	104.1	136.9	4%	5%
Papa John's	PapaJohns.com	76.7	85.5	4%	4%
Subway	Subway.com	30.3	42.5	3%	4%
Olive Garden	OliveGarden.com	24.8	29.1	3%	4%
Taco Bell	TacoBell.com	23.4	46.3	4%	7%
Applebee's Grill & Bar	Applebees.com	22.1	17.7	4%	3%
Wendy's	Wendys.com	20.0	29.6	4%	6%
Red Lobster	RedLobster.com	17.3	9.0	4%	2%
KFC	KFC.com	13.2	20.2	4%	6%
Chili's Grill & Bar	Chilis.com	12.8	7.8	3%	2%
Popeye's	Popeyes.com	10.8	5.4	5%	3%
Outback Steakhouse	Outback.com	10.3	7.8	2%	2%

*Includes websites that averaged more than 10,000 unique child visitors per month

Source: comScore Media Metrix Key Measures report for children & teens (January - December 2016)

In contrast, all but one of the fast food and other casual restaurants (Arby's) maintained websites with enough child visitors to measure in comScore. Thirteen of these sites averaged more than 10,000 unique child visitors per month in 2016 (**Table 74**). PizzaHut.com and Dominos.com each averaged more than 100,000 child visitors monthly, while PapaJohns.com averaged 77,000. Notably, eleven restaurant websites attracted more child than teen visitors, including PizzaHut.com, Applebees.com, and RedLobster.com.

Social media accounts

With the exception of Subway and Sonic kids' meals, all child-directed brands from non-participating companies maintained _____ on _____, _____, and _____. However, only Airheads and Chuck E. Cheese's had 1 million or more _____ or _____ on any of their accounts (see **Table 75**). Compared with other companies in our analyses, child-directed brands also were less active in social media. However, the majority of these brands _____ approximately 100 times or more on Facebook in 2016, while Chuck E. Cheese's _____ about 18 times per day. Laughing Cow Cheese had

more than 200 _____ in 2016. Five child-directed brands also maintained active YouTube channels in 2016. Chuck E. Cheese's had 41 million video views in 2016 and 46 uploaded videos. Laughing Cow, Airheads, and Babybel also had 1.7 million or more cumulative video views each.

In contrast, 19 non-participating fast food and other casual restaurants in our analysis maintained U.S. social media accounts on Facebook, Twitter, and Instagram. Total Facebook fans exceeded 1 million for all companies except Popeye's and Golden Corral (see **Table 76**). KFC had almost 40 million Facebook fans, followed by Subway with 26 million. Domino's, Taco Bell, and Dairy Queen each had approximately 10 million Facebook fans. Subway, KFC, Domino's, Taco Bell, Pizza Hut, and Wendy's also had approximately 1 million or more Twitter followers. These same companies had 250,000 or more Instagram followers. Many of these restaurants were also quite active on Facebook, with Pizza Hut, Olive Garden, Golden Corral Restaurant, Papa John's, Little Caesars, and Applebee's averaging one post per day in 2016. Applebee's and Taco Bell tweeted over 380 times per day. Olive Garden, Pizza Hut, Domino's, and Applebee's also posted approximately once per day on Instagram in 2016.

Table 75. Social media accounts for non-participating company child-directed brands* in 2016

Company	Brand	Facebook		Twitter		Instagram	
		Fans (000)***	Posts	Followers (000)***	Tweets	Followers (000)***	Posts
Perfetti Van Melle	Airheads	1,134	226	18	1,937	**	**
Chuck E. Cheese's		952	212	21	6,747	**	**
Dave & Buster's		539	126	31	836	11	119
The Bel Group	Laughing Cow Cheese	314	191	10	432	7	208
The Topps Company	Ring Pop	280	97	**	**	**	**
The Bel Group	Babybel	127	79	5	728	**	**

YouTube			
Company	Account name	Video views (000)	Uploaded videos
Chuck E. Cheese's	ChuckE CheeseVideo	40,615	46
The Bel Group	LaughingCowTV	2,556	11
Perfetti Van Melle	therealairheads	1,747	4
The Bel Group	USBabybel	1,676	5
Dave & Buster's	DaveAndBustersFun	**	**

*Includes brands with 100,000+ fans or followers on any social media platform

**Account active in 2016, but data were not available

***As of December 31, 2016

Source: Rudd Center analysis of Unmetric data (January – December 2016)

All fast food and other casual restaurants in this analysis also maintained active _____ channels. Popular accounts on other social media platforms were also popular on YouTube; Domino's, KFC, Wendy's, and Pizza Hut had the most YouTube _____, each exceeded 22 million in 2016. Among casual restaurants, Denny's and Outback Steakhouse led with more

than 10 million views. All restaurants _____ more than 10 videos in 2016, with the majority uploading 40 or more. Wendy's uploaded 141 different videos in 2016, followed by 65 Pizza Hut videos.

Table 76. Social media accounts for non-participating fast food and other casual restaurants in 2016

Company	Facebook		Twitter		Instagram	
	Fans (000)*	Posts	Followers (000)*	Tweets	Followers (000)*	Posts
KFC	39,628	204	1,110	3,293	350	108
Subway	25,795	111	2,420	10,176	349	68
Domino's Pizza	10,380	216	1,127	65,733	479	333
Taco Bell	10,304	98	1,790	140,867	308	127
Dairy Queen	10,239	235	417	11,400	162	159
Wendy's	7,763	265	992	18,477	253	127
Olive Garden	6,469	424	354	30,225	192	373
Applebee's Grill & Bar	5,953	320	595	159,809	154	297
Pizza Hut	5,778	584	1,493	31,228	453	361
Chili's Grill & Bar	4,008	216	348	78,574	103	196
Red Lobster	3,955	175	268	18,562	103	104
Sonic	3,408	194	314	10,078	165	214
Outback Steakhouse	3,109	109	282	3,846	32	94
Little Caesars	2,757	332	172	10,515	**	**
Arby's	2,645	114	709	4,019	71	34
Papa John's	2,402	422	458	6,573	113	168
Denny's Restaurant	1,052	201	337	509	70	126
Popeye's	542	139	79	11,402	44	50
Golden Corral Restaurant	475	387	36	2,971	3	118

Table 76. Social media accounts for non-participating fast food and other casual restaurants in 2016 (continued)

Company	YouTube***		
	Account name	Video views (000)	Uploaded videos
Domino's Pizza	dominosvids	60,130	24
KFC	kfccolonelsanders	46,435	36
Wendy's	wendys	31,547	141
Pizza Hut	pizzahut	22,438	65
Denny's Restaurant	dennys	15,137	52
Subway	subway	11,696	45
Outback Steakhouse	outbacksteakhouse1	10,360	25
Arby's	arbys	7,720	48
Taco Bell	tacobell	5,459	57
Sonic	sonicdrivein	5,151	58
Chili's Grill & Bar	chilis	4,754	13
Olive Garden	olivegarden	4,718	46
Little Caesars	littlecaesarspizza	2,276	29
Papa John's	papajohns	1,705	24
Red Lobster	redlobsterseafood	1,398	26
Applebee's Grill & Bar	applebeeing	1,338	49

*As of December 31, 2016

**Account active in 2016, but data was not available

***Channels with more than 1 million video views in 2016

Source: Rudd Center analysis of Unmetric data (January – December 2016)

Key findings

- The 24 non-participating companies with top-50 brands spent \$3.4 billion to advertise in 2016, one quarter of advertising spending by all food, beverage, and restaurant companies. These companies also were responsible for approximately 30% of TV ads viewed by preschoolers, children, and young teens in 2016, averaging 2 to 3 ads viewed per day for these age groups. As noted earlier, from 2007 to 2016, advertising spending and TV advertising to children by these companies increased substantially, more than offsetting declines by CFBAI companies.
- Seven non-participating companies had top-50 brands that were child-directed brands in 2016, including two fast food restaurants (Subway and Sonic kids' meals), two casual restaurants (Chuck E. Cheese's and Dave & Buster's), two candy companies (Topps and Perfetti Van Melle), and The Bel Group (Laughing Cow and BabyBel cheeses). From 2007 to 2016, these companies increased their advertising spending by 45%, while TV ads viewed by preschoolers and children increased by 35% and 23%, respectively.
- More than 80% of TV ads for companies with top-50 child-directed brands were viewed on children's programming, and from 2007 to 2016 these companies increased the number of ads viewed by preschoolers and children on children's TV by 36% and 27%, respectively.
- Preschoolers and children viewed 147 and 109 TV ads, respectively, for Chuck E. Cheese's in 2016. Topps candy brands were responsible for another 70 ads viewed by preschoolers and 89 ads viewed by children.
- Chuck E. Cheese's had the most advertising to preschoolers (under age 6) of any single brand in our analysis. Both Chuck E. Cheese's and Bel brands advertised on preschool TV channels (Nickjr. and Sprout) in 2016.
- The 12 fast food restaurants in this category (excluding kids' meals) spent \$2.7 billion on advertising in 2016, an increase of \$640 million compared with 2007. Preschoolers and children saw 600 and 644 TV ads from these fast food restaurants in 2016, increases of 95% and 61%, respectively, compared to 2007. Although young teens saw far more ads for these restaurants (835 in 2016) than did younger children, their exposure increased by just 17% from 2007 to 2016.
- Some fast food restaurants advertised products that were not kids' meals on children's TV programming (including Sonic, Subway, Wendy's, and Papa John's). However, 97% of non-participating fast food restaurant ads viewed by preschoolers and children appeared on other types of television.
- Despite a decline in advertising spending by the other casual restaurants in our analysis, from 2007 to 2016 TV advertising viewed by preschoolers and children for these restaurants increased by 59% and 46%, respectively. Nearly all these ads appeared on other types of TV programming; Denny's was the only restaurant in this category to advertise on children's TV.

- Chuck E. Cheese's and five fast food and other casual restaurants placed more than 1 million banner ads each on kids' websites in 2016.
- Chuck E. Cheese's had the most child visitors to its website in 2016 compared with all other non-participating companies. However, two fast food websites (PizzaHut.com and Dominos.com) also averaged more than 100,000 child visitors per month.
- All 19 fast food and other casual restaurants examined maintained social media accounts in all four platforms. Fast food restaurants had the most popular Facebook and Twitter accounts of any type of company in our analysis, including a median 6.8 million Facebook fans per account.

Companies with healthy brands

In this section, we discuss advertising by non-participating companies with brands in the healthier fruit, vegetable, nuts, milk, and yogurt categories. We include information about six companies that averaged at least 10 TV ads viewed by children ages 2 to 11 in 2016. These companies promoted 10 brands with at least two ads viewed by children in 2016. Although the amount of TV advertising for these brands was low, they were notable for advertising products in the healthiest categories directly to children.

Advertising spending

_____ for companies with healthy brands totaled \$290 million in 2016, 68% of which was dedicated to English-language TV advertising (see **Appendix Table A3**). Although total ad spending for these companies increased by 14% from 2007 to 2016, these companies contributed just 2% of all food, beverage, and restaurant ad spending in 2016.

Three brands each spent more than \$40 million in total advertising in 2016: MilkPEP (marketing campaigns funded

by U.S. milk companies, including GotMilk? and Milk Life), Silk almond milk, and Chobani yogurt (see **Table 77**). Three Wonderful brands spent more than \$20 million each (POM Wonderful, Wonderful Pistachios & Almonds, and Wonderful Halos). In addition to English-language TV advertising, five brands devoted approximately 20% or more of their advertising budgets to national magazines in 2016: Silk, Fiji Water, MilkPEP, Wonderful Pistachios & Almonds, and Wonderful Halos. MilkPEP also spent \$6.4 million on Spanish-language TV advertising in 2016.

Nine of these ten brands increased total advertising spending from 2007 to 2016. Notably, six brands had little or no advertising in 2007: MilkPEP, Chobani, Pom Wonderful, Wonderful Pistachios & Almonds, Wonderful Halos, and Dole Fruitocracy. Only Birds Eye reduced its advertising spending from 2007 to 2016. The brand had only advertised its frozen vegetables in 2007, but also advertised frozen entrees in 2016.

TV advertising to children

On average, preschoolers, children and young teens each viewed approximately 110 TV ads in 2016 for the companies with healthy brands in this analysis combined (see **Figure 22**). This exposure included some advertising on _____, ranging from 11% of _____ by young teens to 22% for preschoolers. From 2007 to 2016, TV advertising by these companies increased substantially for all child age groups, including approximately six-fold increases for preschoolers and children (see **Appendix B5**). Increases in ads viewed on children's TV were even greater, although the total number of ads viewed remained low (see **Appendix B6**). Furthermore, the number of TV ads viewed by preschoolers and children (but not young teens) increased each year of the analysis, albeit a small number relative to other categories.

Combined, Wonderful brands had more TV ads viewed by all age groups than any other company with healthy brands in this analysis: averaging more than 30 ads viewed by preschoolers,

Table 77. Advertising spending by non-participating companies with healthy brands in 2016

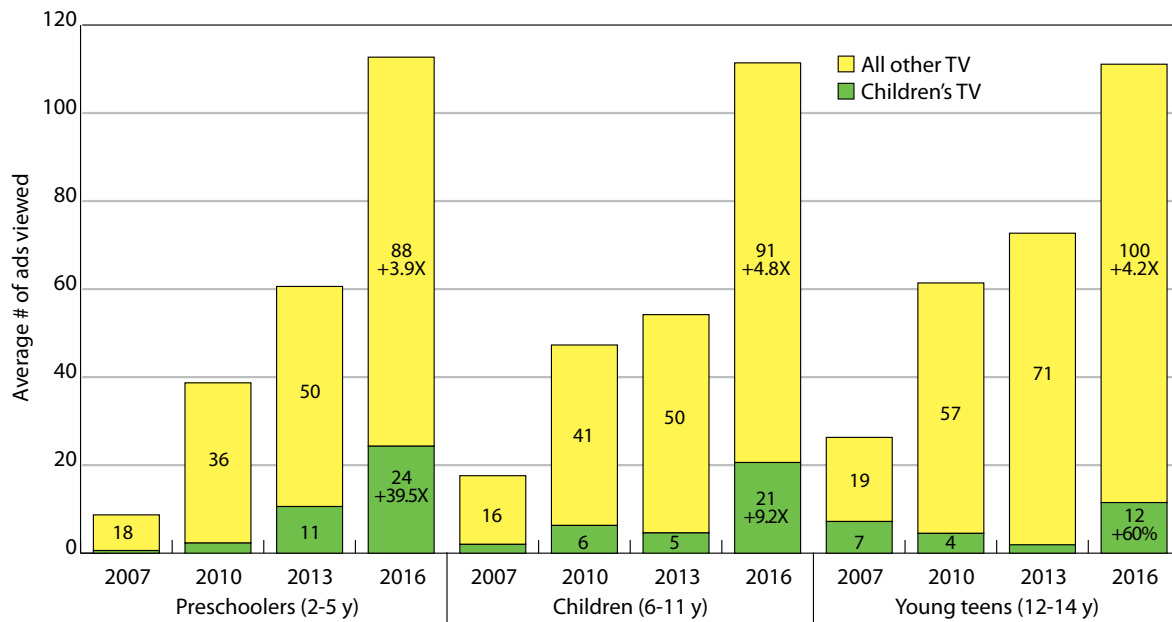
Company	Brand	Total ad spending (\$ mil)	TV % of total*	Change in total spending from 2007
MilkPEP	MilkPEP	\$57.5	62%	**
WhiteWave Foods Co	Silk	\$49.6	46%	118%
Chobani	Chobani	\$42.9	93%	**
The Wonderful Company	POM Wonderful	\$32.0	81%	**
The Wonderful Company	Wonderful Pistachios & Almonds	\$30.8	69%	**
The Wonderful Company	Wonderful Halos	\$23.8	73%	**
The Wonderful Company	Fiji Water	\$9.2	59%	63%
Dole Food Company	Dole Fruit Bowls	\$7.2	95%	118%
Birds Eye	Birds Eye Frozen Vegetables/Entrees	\$4.4	96%	-45%
Dole Food Company	Dole Fruitocracy	\$2.7	85%	**

*English-language TV advertising only

**No ad spending in 2007

Source: Rudd Center analysis of Nielsen data (2017)

Figure 22. Changes in ads viewed for companies* with healthy brands on children's and all other TV



*Company totals for all brands

Increases shown from 2007 to 2016, 38.4X indicates an increase of 38 times.

Source: Rudd Center analysis of Nielsen data (2017)

Table 78. TV ads viewed for non-participating company healthy brands in 2016

Company	Brand	Preschoolers (2-5 y)				Children (6-11 y)				Young teens (12-14 y)			
		Avg # of TV ads viewed (18-49 y)	Tgtd ratio vs adults	% Change viewed on children's TV	% Change in ads viewed from 2007	Avg # of TV ads viewed (18-49 y)	Tgtd ratio vs adults	% Change viewed on children's TV	% Change in ads viewed from 2007	Avg # of TV ads viewed (18-49 y)	Tgtd ratio vs adults	% Change viewed on children's TV	% Change in ads viewed from 2007
MilkPEP		15.9	0.79	12%	**	13.8	0.69	3%	**	12.3	0.61	1%	**
The Wonderful Company	Wonderful Halos	15.2	1.00	31%	**	14.2	0.93	7%	**	10.4	0.68	6%	**
Dole Food Company	Dole Fruitocracy	11.4	3.50	85%	**	15.5	4.73	82%	**	9.5	2.89	78%	**
Chobani		8.5	0.41	0%	**	8.1	0.40	0%	**	10.6	0.52	0%	**
The Wonderful Company	POM Wonderful	8.4	0.37	0%	**	8.1	0.36	0%	**	9.5	0.42	0%	**
Birds Eye	Birds Eye Frozen Vegetables/ Entrees	7.4	0.70	22%	160%	5.0	0.47	11%	122%	5.1	0.49	4%	61%
WhiteWave Foods Co	Silk	7.1	0.42	89%	40%	6.7	0.40	89%	35%	7.6	0.45	44%	1%
The Wonderful Company	Wonderful Pistachios & Almonds	6.4	0.38	0%	**	6.5	0.38	0%	**	7.5	0.44	0%	**
Dole Food Company	Dole Fruit Bowls	4.3	0.53	0%	**	5.2	0.65	0%	**	4.8	0.60	0%	**
The Wonderful Company	Fiji Water	2.8	0.41	0%	**	3.1	0.46	0%	**	4.8	0.71	0%	**

** Fewer than two ads viewed in 2007

Source: Rudd Center analysis of Nielsen data (2017)

Table 79. TV ads viewed on preschool channels for non-participating company healthy brands in 2016

Company	Brand	Avg # of ads viewed	
		Preschoolers (2-5 y)	Children (6-11 y)
Birds Eye	Birds Eye Frozen Vegetables	1.66	0.54
MilkPEP		1.88	0.40
The Wonderful Company	Wonderful Halos	4.73	1.00

Source: Rudd Center analysis of Nielsen data (2017)

children, and young teens in 2016 (see **Table 78**). Among the healthy brands, Wonderful Halos, Dole Fruitocracy, and MilkPEP each had more than 10 ads viewed by preschoolers and children. For young teens, Wonderful Halos, MilkPEP, and Chobani averaged more than 10 ads viewed. From 2007 to 2016, Silk and Birds Eye increased their advertising to all child age groups, while all other brands did not advertise to children until 2010 or 2013.

Several healthy brands appeared to target children with their TV advertising. Dole Fruitocracy had the highest targeted ratios, with children in all age groups viewing three to five times as many ads as adults viewed. Preschoolers and children

also saw relatively more ads for Wonderful Halos compared with adults, with targeted ratios of 1.0 and 0.93, respectively.² More than 80% of TV ads for Silk and Dole Fruitocracy viewed by preschoolers and children in 2016 appeared on children's TV. MilkPEP and Birds Eye also advertised on children's TV. In addition, preschoolers viewed on average 2 ads each for Birdseye Frozen Vegetables, MilkPEP, and Wonderful Halos on _____ (see **Table 79**).

Digital marketing

Dole Food and MilkPEP were the only companies with healthy brands to place _____ on _____ in 2016, although these ads represented just 1% of their total banner ad impressions (See **Table 80**). These two companies advertised somewhat more on Facebook and YouTube. However, the total number of banner ads placed by these companies was low relative to other companies in our analysis.

Dole was the only company with healthy brands that had enough child visitors to its _____, Dole.com, to report in comScore. Just 1% of visitors to Dole.com were between the ages of 2 and 12 (averaging 300 unique child visitors per month) in 2016, and just 2% were ages 12 to 17.

However, these brands were more active in social media. All healthy brands in our analysis maintained _____ on _____ and _____, while only Birds Eye did

Table 80. Banner ads on kids' and social media websites for companies with healthy brands in 2016

Company	Kids' websites		Social media sites		
	# of ad impressions (000)	% of ad impressions	# of ad impressions on Facebook (000)	# of ad impressions on YouTube (000)	% of brand impressions*
MilkPEP	401	1%	1,443	239	6%
Dole Food Company	53	1%	324	414	14%

*Includes Facebook and YouTube

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Table 81. Social media accounts for companies with healthy brands in 2016

Company	Brand	Facebook		Twitter		Instagram	
		Fans (000)*	Posts	Followers (000)*	Tweets	Followers (000)*	Posts
Dole Food Company	Dole	1,919	345	10	1,566	4	330
Chobani		1,162	295	104	3,221	32	296
Birds Eye	Birds Eye Vegetables	843	37	16	470		
The Wonderful Company	Wonderful Pistachios	815	102	41	845	3	27
WhiteWave Foods Co	Silk	704	252	47	1,812	20	246
The Wonderful Company	Wonderful Halos	614	108	10	624	24	65
The Wonderful Company	Fiji Water	563	146	44	5,321	26	119
MilkPEP		475	294	22	603	1	237
The Wonderful Company	POM Wonderful	300	120	15	259	8	105

Table 81. Social media accounts for companies with healthy brands in 2016 (continued)

YouTube**			
Company	Account name	Video views (000)	Uploaded videos
Chobani	chobaniyogurt	25,719	41
Dole Food Company	doletube	6,188	25
MilkPEP	MilkMustacheCampaign	5,907	30
WhiteWave Foods Co	TheSilkChannel	5,026	65
The Wonderful Company	POMWonderful	1,798	2
The Wonderful Company	FIJIWaterCompany	1,030	14

* As of December 31, 2016

**Includes channels with 1,000,000+ views in 2016

Source: Rudd Center analysis of Unmetric data (January – December 2016)

not have an _____ account (see **Table 81**). The Wonderful Company had separate accounts for all its four brands, but Dole had just one account for all brands. Dole and Chobani had more than one million _____, Chobani had the most _____ and _____, and Silk, Fiji Water, and Wonderful Halos had more than 20,000 Instagram followers each. These companies were also quite active on social media. Dole, Chobani, Silk, and MilkPEP averaged more than 200 _____ each in 2016, and Fiji Water and Chobani averaged more than 3,000 _____ per year. Six of the eight brands with Instagram accounts posted more than 100 times in 2016, including 330 _____ on Dolepics.

YouTube was also a popular marketing platform for healthy brands in 2016. Six of the nine brands with active _____ had accumulated more than 1 million _____, including 26 million for Chobani, 6 million for Dole and MilkPEP, and 5 million for Silk. All but three channels also uploaded more than 10 videos in 2016, including 65 videos on TheSilkChannel and 41 on ChobaniYogurt.

Key findings

- The six companies in this analysis with healthy brands represented less than 1% of total food-related advertising spending in 2016 and 3% or less of all TV food advertising viewed by children, averaging approximately 110 TV ads viewed by preschoolers and children for the six companies combined in 2016.
- However, exposure by preschoolers and children to TV advertising for healthy brands increased five-fold or more from 2007 to 2016, and most healthy brands placed some advertising on children's TV.
- In contrast to relatively little advertising in traditional media, most of these companies maintained popular and active social media accounts, averaging 3.9 platforms per account.

In the ten years since the Children's Food and Beverage Advertising Initiative (CFBAI) was implemented, the landscape of food advertising to children has changed, in both positive and negative ways. The analyses in this report show that many CFBAI participating companies have reduced advertising to children, especially on children's TV, but significant increases in children's exposure to advertising by other companies and new forms of marketing in social media are cause for public health concern. Substantial opportunities to improve food marketing to children through industry self-regulatory programs, including the CFBAI, remain.

These analyses confirm that CFBAI participating companies have made significant progress in reducing the number of food-related advertisements viewed by children, especially in media predominantly viewed by children.

- In compliance with their pledges, only CFBAI listed brands (i.e., brands with products included on CFBAI company lists of products that may be advertised to children) appeared to direct their advertising to children under 12, including in advertising on children's TV programming.
- The number of ads for CFBAI companies viewed by preschoolers (ages 2-5), children (ages 6-11), and young teens (ages 12-14) on children's TV programming declined by approximately 50% from 2007 to 2016.
- The number of ads for all CFBAI company brands viewed on other types of TV programming also declined, but at lower rates (by 4% for preschoolers, 18% for children, and 31% for young teens).
- CFBAI companies placed relatively few banner ads on third-party kids' websites, representing just 9% of ads for CFBAI listed brands and 1% of ads for other (i.e., non-listed) brands.
- CFBAI companies have discontinued the majority of their most popular child-directed websites, while the number of child visitors to remaining CFBAI company websites declined dramatically from 2009 to 2016.

These analyses also confirmed that companies participating in the Children's Confection Advertising Initiative (CCAI), launched in 2016, reduced their advertising and complied with their pledges to not direct any advertising to children under 12.

- However, the CCAI has had little effect on children's total exposure to candy advertising as these companies had little advertising before the Initiative was implemented.

Reductions in amount of TV viewing by children in all age groups have also contributed to recent declines in exposure

to food-related ads on other (not children's) TV programming, although these declines have been largely offset by opposing trends.

- From 2013 to 2016, the amount of time spent watching traditional TV declined by 15% for preschoolers, 20% for children, and 30% for young teens.
- However, during the same time, numbers of food ads per hour of TV viewing (for children and young teens) and exposure to TV advertising for non-participating companies on other TV (not children's) programming – especially ads viewed by preschoolers and children – have increased.
- As a result, total exposure to food-related TV ads has declined at a lower rate, by just 4%, 11%, and 14% for preschoolers, children, and young teens, respectively.
- Furthermore, children in all age groups continued to view large numbers of food-related ads, averaging 10 to 11 TV ads viewed per day in 2016.

Opportunities to improve food industry self-regulation

Despite the progress made by companies participating in the CFBAI, this analysis also identifies the continued need for improvements in the CFBAI to reduce the harmful effects of children's exposure to advertising for nutritionally poor food and beverages, including limitations in four main areas that have been previously identified by public health experts:¹⁻³

Improve CFBAI category-specific uniform nutrition criteria

Analyses of the nutritional quality of products that met CFBAI nutrition criteria and could be featured in child-directed advertising (i.e., listed products) demonstrates that the majority of these products do not support a diet that accords with the 2015 Dietary Guidelines for Americans.⁴

- One-third of the listed packaged food and drink products were yogurts, but more than one-third were fruit-flavored drinks, sweet and savory snacks, and sugary breakfast cereals. There was only one vegetable and no fruit on the list (excluding fast food kids' meal side items).
- There was also wide variation by category in how well the CFBAI nutrition criteria corresponded to nutrition standards established by other experts to identify food and drinks that children should be encouraged to consume (i.e., NPI score for products that can be advertised to children in the United Kingdom and Smart Snacks standards for food sold to children in U.S. schools).
- The majority of listed yogurts and meals and entrees met both NPI and Smart Snacks standards. However, the majority of products in other categories did not meet either standard.

- The CFBAI category, “Other grain, fruit and vegetable products, and items not in other categories,” contained products, such as Popsicles and Betty Crocker Fruit Snacks, with little or no nutritional value.
- Furthermore, low-calorie fruit-flavored drinks containing little or no juice, non-nutritive sweeteners, and often added sugar (e.g., Kool-Aid and Capri Sun Roarin’ Waters) were exempt from CFBAI nutrition criteria.

In addition, the majority of brands with products that may be in child-directed advertising also offered numerous products that were not included on their lists of products that may be featured in child-directed advertising, including many that did not meet CFBAI nutrition criteria.

- CFBAI brands with listed products also offered 386 non-listed products, 55% of all products offered by these brands.
- Approximately 50% of these non-listed products met CFBAI nutrition standards for their categories, while just 33% met both Smart Snacks and NPI nutrition criteria.
- CFBAI categories with the highest proportion of non-listed products offered by CFBAI brands included meals and entrees (39% of products were listed); breakfast cereals (36% were listed products); and other grains, vegetables, and items not in other categories (40% were listed).

Expand the ages of children covered

CFBAI companies’ pledges to not advertise in media primarily directed to children under age 6 (i.e., 35% or more of the audience is 2-5 years old) do not adequately protect preschoolers from exposure to advertising for CFBAI brands.

- CFBAI companies appeared to comply with this pledge by not advertising during preschool TV programming (e.g., Nickjr. and Sprout). However, commercial preschool TV comprised a small amount of all television viewed by preschoolers. Preschoolers also watched much of the same children’s TV programming viewed by 6- to 11-year-olds, as well as programming aimed at broader audiences.
- As a result, preschoolers viewed just 11% fewer ads for CFBAI brands than children viewed in 2016, and this gap narrowed from 13% fewer ads in 2007.
- Preschoolers saw even more ads on other TV programming (not children’s TV) than children for some CFBAI companies, including Mondelez, McDonald’s, and Campbell Soup Company, and equal numbers of ads for Hershey and Ferrero brands.

Furthermore, CFBAI company improvements in advertising to children under 12 have had limited benefit for young teens (ages 12-14), who watch relatively little children’s TV programming.

- Young teens viewed 39% fewer ads for CFBAI listed brands (i.e., brands with products that companies included on lists

of products that may be advertised in child-directed media) than did children, but 30% more ads for non-listed brands (i.e., other brands that were not indicated for child-directed advertising).

- As a result, ads for candy, sugary drinks, snack foods, and fast food (excluding kids’ meals) comprised the majority of CFBAI company ads viewed by young teens.

Expand the definition of child-directed advertising

These analyses also provide evidence of limitations in CFBAI companies’ definition of child-directed advertising (i.e., advertising in media where 35% or more of the audience are under age 12).

- Despite compliance with their pledges to only advertise listed products in media that met this definition, more than one-half of TV ads viewed by preschoolers and children placed by CFBAI companies promoted non-listed brands that companies pledged they would not advertise directly to children. In 2016, preschoolers saw 1,384 TV ads and children saw 1,443 ads for CFBAI non-listed brands, averaging approximately 4 ads viewed daily.
- Furthermore, from 2007 to 2016, the number of TV ads viewed by preschoolers and children placed by companies that pledged they would not direct any advertising to children increased by 17% and 5%, respectively.
- Just five of the 10 third-party websites identified by comScore as “kids” websites where CFBAI companies placed the most banner advertising qualified as child-directed, according to the CFBAI definition, although children were approximately two to three times more likely to visit these sites than were adults and their content was primarily aimed at kids.
- In addition, the proportion of child visitors to some CFBAI company websites for listed brands (including FrootLoops.com, LeggoMyEggo.com, and Danimals.com) did not meet the CFBAI definition of child-directed media, while some websites for brands that pledged to not direct any advertising to children were visited by disproportionately more children than adults (including Coca-ColaStore.com).
- CFBAI companies’ high presence on social media, including for listed brands, indicates that company pledges should also address this increasingly important form of marketing.

Increase voluntary participation

The most consequential limitation of the CFBAI is that participation is voluntary, and a small group of non-participating companies have stepped up their advertising – both in children’s TV and other types of media viewed by large numbers of children – which has largely offset reduced advertising by CFBAI participants.

- Seven non-participating companies with top-50 brands targeted advertising to children under 12, including in advertising on children's TV. TV ads viewed by preschoolers and children for these companies increased by 35% and 23%, respectively, from 2007 to 2016.
- Two non-participating companies (Chuck E. Cheese's and Topps candy brands) exceeded all but four CFBAI companies in total advertising viewed on children's TV in 2016. Chuck E. Cheese's also placed 1.5 million banner ads on kids' websites and had the most child visitors to its website in 2016, compared with all other non-participating companies.
- In 2016, preschoolers under age 6 viewed more ads for Chuck E. Cheese's than for any other food, drink, or restaurant brand, including CFBAI brands. Chuck E. Cheese's and Bel Brands also advertised on preschool TV networks (Nickjr. and Sprout).
- Although not targeted primarily to children under 12, preschoolers and children viewed 784 and 839 TV ads, respectively, for 19 non-participating fast food and other (i.e., not child-directed) casual restaurants. Fast food restaurants contributed approximately three-quarters of these ads.
- Furthermore, exposure to TV ads for the non-participating fast food restaurants examined increased by 95% for preschoolers and 61% for children from 2006 to 2017, while exposure to advertising for the other casual restaurants in our analysis increased by 59% and 46%, respectively. Notably, young teens viewed more ads for fast food and casual restaurants than did younger children, but increases in TV ads viewed from 2007 to 2016 were much lower for this age group; 17% for fast food and 9% for other casual restaurants.
- The majority of non-participating fast food and other casual restaurants examined also placed some banner ads on kids' third-party websites in 2016, and many had their own websites that were popular with children. Pizza Hut dominated in online advertising to children with over 11 million banner ads on kids' websites and on average 138,000 child visitors to PizzaHut.com per month in 2016.

The only evidence of increased advertising to children for healthy products that they should be encouraged to consume (including fruit and vegetables, nuts, plain water, and milk) was for a small number of companies that did not participate in the CFBAI.

- In total, six companies with healthy brands increased their TV advertising to preschoolers and children six-fold from 2007 to 2016, including The Wonderful Company, MilkPEP, WhiteWave Foods Co, and Chobani.
- However, these ads represented 3% or less of food-related TV ads viewed by preschoolers, children, and young teens in 2016.

Limitations of these analyses and need for further research

A strength of the analyses in this report is that they utilize publicly available syndicated market research data, including the same data that companies use to measure their own advertising and monitor competitors' marketing activities. However, these data have limitations.

- We utilized data providers' definitions of child-directed media, including children's TV programming identified by Nielsen and kids' websites defined by comScore. These definitions do not conform exactly with CFBAI company definitions of media where children under 12 make up 35% or more of the audience. For example, comScore defines children as ages 2 to 12. However, they do represent a reliable third-party's definition of media aimed primarily at children.
- Available data on banner advertisements viewed on third-party websites (e.g., social media sites) and popularity and activity on food companies' social media accounts does not provide demographic information about who is viewing and engaging with this marketing, including whether they are children, teens, or adults. However, cross-sectional studies have shown that social media platforms, including Facebook, Instagram, and YouTube, are popular with youth, including children under age 13.^{5,6} Therefore, it is important to understand the extent of food-related marketing that occurs on increasingly popular social media platforms.
- In addition, we report all advertising viewed by children, including advertising that may be aimed primarily at a broader audience including teens and/or adults. Although CFBAI companies have not made any promises to limit advertising in media that is not primarily directed to children under age 12, and the CFBAI has stated that it does not consider this advertising to be advertising to children,⁷ it nonetheless affects children. Therefore, this information is important for understanding the food marketing landscape.

These analyses also indicate the need for additional research in several areas to identify further improvements in industry self-regulation.

- Analyses are required to assess the types of TV programming (beyond children's TV) where preschoolers viewed so much food-related advertising, why exposure by preschoolers has not declined as much as exposure by children, and why differences between ads viewed by preschoolers versus children on other TV programming varied so much by company. This information would highlight potential actions to reduce exposure by the youngest children.
- Similarly, analyses of the types of programming where companies placed TV ads for brands viewed by disproportionately more young teens (ages 12-14) than children would help identify opportunities to improve advertising to this somewhat older, but still vulnerable age group.

- Future research must examine the extent that food-related advertising contributes to health disparities that disproportionately affect black and Hispanic youth, including marketing that targets these youth directly and differences due to their greater exposure to media with higher rates of unhealthy food advertising.^{8,9}
- Future research should also examine the messages used in advertising for CFBAI non-listed brands and non-participating companies widely viewed by children, the extent that these ads used messages that appeal to children, and how these messages affect children's attitudes, preferences, and perceived healthfulness for advertised products.
- Research is also needed to measure children's access and engagement with food company accounts on social media platforms, as well as other food-related marketing on social media sites.
- Finally, this analysis did not examine marketing in non-media venues, including in schools, retail locations, product packaging, and sponsorships, or use of licensed characters. As most of these forms of marketing are not covered by CFBAI company pledges, research is required to determine the extent of children's exposure to unhealthy food marketing in these other locations.

Recommendations

As the White House Task Force on Childhood Obesity concluded, "Key actors – from food and beverage companies, to restaurants, food retailers, trade associations, the media, government and others – all have an important role to play in creating a food marketing environment that supports, rather than undermines, the efforts of parents and other caregivers to encourage healthy eating among children and prevent obesity."¹⁰ The analyses in this report identify numerous opportunities for all key actors to improve the food marketing environment surrounding children.

CFBAI companies

As noted in previous assessments of food industry self-regulation, changes in CFBAI company pledges are needed to address limitations that allow participating companies to continue to advertise nutritionally poor food and drink products to children.

- Revise CFBAI category-specific uniform nutrition criteria to support a diet that accords with the 2015 Dietary Guidelines for Americans.¹¹ At a minimum, they should correspond with Smart Snacks standards.
- Only advertise brands in child-directed media when all products offered by brands meet CFBAI nutrition criteria, so that brands consisting of primarily unhealthy products do not continue advertising to children.

- Implement Healthy Eating Research (HER) recommendations¹² to expand the child audience definition to include children up to age 14 and revise definitions of child-directed advertising to include lower child audience shares and marketing messages, techniques, and venues that appeal to children.
- Establish requirements to effectively reduce preschoolers' exposure to advertising beyond restricting advertising on the few preschool channels that accept commercial advertising. For example, companies could lower preschool audience thresholds and/or establish time of day restrictions (e.g., no ads during school-day hours on children's TV).

Non-participating food, beverage, and restaurant companies

A small number of non-participating companies are responsible for the majority of non-CFBAI company food advertising viewed by children. These companies must take actions to reduce children's exposure to their advertising, either through participation in existing self-regulatory initiatives or by establishing their own company policies.

- Non-participating companies that continue to advertise unhealthy products during children's TV programming, including candy, restaurants, and fast food (not kids' meals) must stop taking advantage of a vulnerable audience. Two companies stand out for advertising unhealthy products on children's TV: Chuck E. Cheese's and The Topps Companies.
- Fast food and other casual restaurants should also take actions to reduce children's exposure to their advertising, including on other TV programming. The National Restaurant Association (NRA) could take the lead and establish marketing standards for all member companies to reduce the unhealthy impact of food marketing to children and teens.

Media companies

Given continued advertising of unhealthy products in children's media by some food companies, media companies should take action to improve food advertising shown during their child-directed programming.

- Following the lead of Disney,¹³ other children's TV networks and third-party websites visited by large numbers of children should set nutrition standards for all advertising by food, beverage, and restaurant companies.
- Preschool TV networks (Nickjr. and Sprout) should not accept any advertising during preschool programming.
- Media companies should also provide incentives (such as reduced advertising rates) for advertisements promoting nutritious foods that children generally underconsume (i.e., fruit, vegetables, and whole grains).

Advocates

Child health advocates can help inform parents about the most harmful food marketing practices and mobilize grassroots action to demand improvements from industry and/or policy actions.

- Public health campaigns should raise awareness of the American Academy of Pediatrics (AAP) guidelines to limit preschoolers' screen time to one hour per day and help parents identify high-quality non-commercial programming options for their young children.
- Grassroots campaigns can raise awareness of current food marketing practices and encourage media companies with child-directed programming (led by Viacom and Turner Broadcasting), as well as the companies with the most prevalent unhealthy food advertising to children (e.g., Chuck E. Cheese's and Topps), to stop advertising these products directly to children.
- Advocates should continue to put pressure on current industry self-regulatory programs, such as the CFBAI and the NRA's Kids LiveWell program, to implement public health experts' recommendations for actions to reduce children's exposure to unhealthy food marketing by their members.

Policymakers

The Institute of Medicine (IOM)¹⁴ in 2012 recommended that policymakers at the local, state, and federal levels should consider setting mandatory standards for marketing to youth if "a substantial majority of food, beverage, restaurant, and media companies that market food and beverages to children and adolescents" do not adopt such standards voluntarily. As the evidence in this report demonstrates, the majority of food-related and media companies have not set standards regarding marketing to youth. Therefore, greater regulation and/or legislation may be necessary.

- The Federal Communications Commission (FCC) should maintain current rules that set limits on advertising on children's broadcast television. It should not approve industry proposals to remove restrictions on product placements and host selling (e.g., promoting company websites within children's programming) and allow program-length commercials during children's programming.¹⁵
- The Federal Trade Commission (FTC) should also take action to address unhealthy food marketing embedded in child-directed content in digital media, such as advertising in YouTube Kids, as demanded by a coalition of child health advocates.¹⁶
- Policymakers also have the authority to regulate food marketing to children at the local and state level, such as recently proposed and enacted bills to strengthen restrictions on unhealthy food marketing in schools¹⁷ and require nutrition standards for kids' meals served in fast food restaurants,^{18,19} as well as other forms of child-directed marketing in retail locations, restaurants, schools, and other locations in the community.²⁰

The CFBAI and participating companies should be recognized for actions they have taken to reduce advertising to children, especially on children's TV and the internet. However, these actions have not resulted in the transformation of the unhealthy food marketing environment surrounding children that the IOM called for in 2006. Ten years later, food advertising to children remains far from the goal of supporting healthful diets for children. All key actors, including the public health community, food and media industries, and policymakers, must take meaningful action to ensure that food marketing does not continue to put children's health at risk.

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Overview of food advertising to children: 2007 to 2016

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21. comScore provides data for websites visited by at least 31 panel members per age group in a given quarter.
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Special issues in industry self-regulation

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Advertising by non-participating companies

1. Children (ages 6-11) viewed 26% fewer hours-per-day of TV than adults (18-49 years) viewed in 2016, so a targeted ratio of TV ads viewed by children versus adults higher than .74 indicates that the brand is child-targeted.
2. Given ratios of time spent watching TV compared with adults (ages 18-49) of .94 for preschoolers (ages 2-5) and .74 for children (ages 6-11).

Conclusions

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We used a variety of data sources to assess food advertising to children in 2016, measure improvements and other changes since the Children's Food and Beverage Advertising Initiative (CFBAI) was implemented in 2007, and quantify progress and the continued impact of limitations in industry voluntary pledges to improve food advertising to children.

In this report we measure the extent of children's exposure to food, beverage, and restaurant advertising using syndicated market research data from Nielsen, comScore, and Unmetric. When data were available, we compare 2016 results to 2007 and two intermediary years (2010 and 2013). Furthermore, we compare results for preschoolers (2-5 years), children (6-11 years), and young teens (12-14 years). We also assess the nutritional quality of products offered by CFBAI company brands in 2017. Specific methods are detailed in the sections below.

We did not have access to food industry proprietary documents, including privately commissioned market research, media, and marketing plans or other strategic documents. Therefore, we do not attempt to interpret companies' goals or objectives for their marketing practices. Rather, we provide transparent documentation of food, beverage, and restaurant (i.e., food-related) advertising, including advertising spending in measured media, TV advertising exposure, and marketing in digital media including company websites, display advertising on third-party websites, and social media.

As the purpose of this report is to evaluate industry self-regulation on its stated goal to advertise only healthier dietary choices in child-directed advertising, we do not address other forms of marketing to children, such as in-store promotions, product packaging, in-school marketing, and sponsorships, not currently covered by the CFBAI. However, we do include advertising by food, beverage, and restaurant companies that did not participate in the CFBAI, as well as CFBAI participants, to identify opportunities to broaden participation in the Initiative. Similarly, we evaluate the extent of children's exposure to advertising that may not specifically target children, but that children nevertheless view frequently, including ads on all types of TV programming, children's visits to food company websites, banner advertising on third-party websites, and social media advertising.

Food-related advertising and data sources

Our analyses of food-related advertising include: 1) Advertising spending in all media, including TV advertising, in 2007, 2010, 2013, and 2016; 2) TV advertising exposure by age group, including exposure to ads on children's TV programming, in 2007, 2010, 2013, and 2016; 3) Advertising on third-party websites in 2016, including kids' websites and

social media sites; 4) Child and teen visits to food, beverage and restaurant company websites in 2016; and 5) Popularity and activity on food company-sponsored social media pages in 2016, including Facebook, Twitter, Instagram, and YouTube. These analyses use syndicated market research data from Nielsen (advertising spending and exposure to TV advertising), comScore (visits to company websites and advertising on third-party websites), and Unmetric (food company-sponsored social media pages).

Nielsen data

We licensed Nielsen data to identify all food-related companies with advertising spending in any type of media from 2007 to 2016, including all companies in Nielsen's "Foods & Food Products" (F100), and "Confect., Snacks & Soft Drinks" (F200) product classification codes (PCC). We used Nielsen's "Restaurants, Hotel Dining & Night Clubs" (G330) PCC to identify restaurant companies with advertising spending in the aforementioned time period. Nielsen also provided brand level advertising spending for each brand owned and advertised by the companies of interest. For the same companies, brands, and time periods, we also licensed Nielsen data to quantify the total number of advertisements viewed by different age groups of children and adults.

In most cases, we used the company and brand names reported by Nielsen, with some modifications. For restaurant chains owned by a larger company (e.g., Yum! Brands owns KFC, Pizza Hut, and Taco Bell; DineEquity owns Applebee's and Chili's) we report the restaurant chain as the company. In addition, we define brand as the main marketing unit for each product. Nielsen sometimes reports different varieties of the same brand as separate brands. In those instances, we combined data for the Nielsen brands and report them as one brand. For example, we report General Mills' Cinnamon Toast Crunch and French Toast Crunch together as Cinnamon/French Toast Crunch brand; regular Cheerios and Honey Nut Cheerios are reported as Cheerios brand; Betty Crocker Fruit by the Foot, Fruit Gushers, and Fruit Roll-Ups are reported as Betty Crocker Fruit Snacks; and Post Foods' Cocoa Pebbles and Fruity Pebbles Cereal are reported as Pebbles.

Advertising spending

Nielsen tracks total advertising spending in 17 different media, including national (network, cable, and syndicated) and local (spot) TV, Spanish-language TV, internet, radio, magazines, newspapers, free standing insert coupons (FSIs), and outdoor advertising. **Total advertising spending** includes advertising expenditures in these 17 measured media. We report **English-language TV spending**, which includes spending on all national (network, cable, and syndicated) TV. We also report advertising spending on individual media, including Spanish-language TV, radio, outdoor advertising, and national magazines, if the company or brand spent less than 80% of its total advertising on TV advertising. **Spanish-language TV**

advertising includes advertising placed on Spanish cable and broadcast TV networks (e.g., Univision, Telemundo).

TV viewing times

We licensed TV viewing data from Nielsen to calculate average **TV viewing times** for preschoolers (ages 2-5), children (ages 6-11), young teens (ages 12-14), and adults (ages 18-49). This measure provides the average hours of TV viewed by individuals in each age group, which includes TV programming viewed on broadcast, cable, syndicated, and spot networks. We used TV viewing time data to measure relative TV viewing between youth age groups versus adults. These numbers were calculated by dividing TV viewing time for preschoolers (2-5 years), children (6-11 years), or young teens (12-14 years) by TV viewing time for adults (18-49 years). In 2016, the difference in TV viewing time for preschoolers versus adults was 0.94 (i.e. preschoolers viewed 6% less TV than adults), and 0.74 and 0.63 for children-to-adults and young teens-to-adults, respectively. Differences in TV viewing time between groups are compared to differences in exposure to TV advertising between groups.

TV advertising exposure

To measure exposure to TV advertising, we licensed gross rating points (GRP) data from Nielsen. GRPs measure the total audience delivered by a brand's media schedule, expressed as a percentage of the population that was exposed to each commercial over a specified period of time across all types of TV programming. GRPs are the advertising industry's standard measure to assess audience exposure to advertising campaigns, and Nielsen is the most widely used source for these data.⁴ GRPs, therefore, provide an objective assessment of advertising exposure. In addition, GRPs can be used to measure advertisements delivered to a specific audience, or targeting a specific age group or other demographic trait (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 2016 for children and 1,000 GRPs for adults, then we can conclude that on average children saw twice as many ads for that brand in 2016 compared with adults.

We obtained GRP data from 2007 to 2016, for preschoolers (ages 2-5), children (ages 6-11), young teens (ages 12-14), and adults (ages 18-49). In some analyses, we also examined preschoolers and children (ages 2-11) combined. These data provide total exposure to advertising on national (network, cable, and syndicated) TV. We did not obtain GRP data for local (i.e., spot market) TV as spot market data were not available for all age groups.

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, so we also use GRP data to calculate the following TV advertising measures:

Average number of TV ads viewed is calculated by dividing total GRPs for a specific age group during a specific time period by 100. It provides a measure of ads viewed by individuals in that age group during the time period measured. For example, if Nielsen reports 2,000 GRPs for children for a brand in 2016, we can conclude that on average all children viewed 20 ads for that brand in 2016.

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 youth age groups versus adults. **Targeted ratios** are calculated by dividing GRPs for preschoolers (2-5 years), children (6-11 years), or young teens (12-14 years) by GRPs for adults (18-49 years)

A targeted ratio greater than the difference in TV viewing time between age groups indicates that persons in the group of interest viewed more TV ads for a particular brand than would be expected given differences in amount of TV they watched (i.e., someone who watches more TV would be expected to view more TV ads). For example, a brand with a targeted ratio for children that was higher than the ratio of TV viewing for children versus adults would indicate that the brand may have targeted children by placing its advertising in TV programming that they were more likely to watch (e.g., children's TV).

We also obtained GRP data by TV network distributor for children's programming only. Nielsen classifies **children's TV** as the following program types: child day animation, child day-live, child evening, child multi-weekly, and child news-information. We also identified a subset of children's TV programming for which preschoolers were the primary audience. **Preschool TV** networks included BabyTV, Nickjr., and Sprout. For all brands and companies included in our analysis, we report children's exposure to TV advertising on children's TV separately and as a percentage of total TV ad exposure.

In addition, we used Nielsen GRP data to identify **top-50 brands**, which included the 50 brands with the most TV advertisements viewed by preschoolers and children combined (ages 2-11) in 2016. GRP data for top-50 brands was also obtained for young teens (ages 12-14) and adults (ages 18-49) to examine relative exposure between groups. Top-50 brands from non-CFBAI companies were included in our analysis of non-participating (i.e. non-CFBAI) companies.

comScore data

comScore provided data on food marketing that occurs on the internet, including banner ads placed by food companies on third-party websites and visits to food companies' own websites. comScore captures the internet behavior of a representative panel of about 350,000 users in the United States.⁵ comScore provides data for websites visited on personal computers by at least 30 panel members in a given quarter, but does not provide visits on mobile devices for youth under age 18. It is the nation's largest existing internet

audience measurement panel. The firm collects data at both the household and individual level using Session Assignment Technology, which can identify computer users without requiring them to log in. The company uses these panel data to extrapolate its findings to the total U.S. population. Companies participating with comScore can also have census tags placed on their web content and advertisements to further refine audience estimates.

Banner advertising on third-party websites

Data for exposure to food-related **banner advertisements** on third-party websites (i.e. ads placed on websites sponsored by other companies, such as Nick.com, Facebook.com, and YouTube.com, to attract visitors to the advertiser's own website) were extracted from the comScore Ad Metrix Advertiser Report.⁶ comScore measures image-based banner advertisements embedded in third-party websites that are completely downloaded and viewable on a panel member's web browser. Ad Metrix, therefore, measures individual exposure to banner ads presented in rich media (SWF files) and traditional image-based ads (JPEG and GIF files). It does not capture text, video, or html-based ads. Ad Metrix also identifies the unique user viewing the advertisement, the third-party website on which the advertisement was viewed, and the company sponsoring the advertisement.

Banner ad impressions were collected from Ad Metrix for January through December 2016. The Product Dictionary from comScore was used to determine all banner advertisements placed by the companies in our analysis. comScore provides **banner ad impressions** (i.e., the number of times a banner ad was viewed) for brands, websites, and promotions (e.g., My Coke Rewards) in its dictionary that were viewed at least ten times by comScore panel members on the internet or on a specific third-party site. However, comScore does not provide demographic information about panel members who viewed the ads.

Total banner ad impressions on kids' websites in 2016 was extracted from comScore. We used comScore's definition of **kids' websites** (i.e., sites designated as Family & Youth – Kids). These sites include sites where 70% of the content was for kids. The proportion of ads viewed on kids' websites was calculated by dividing the total banner ad impressions for the company, brand, or promotion on kids' websites by the total banner ad impressions that appeared on all websites from January through December 2016.

Although comScore does not allow us to determine the age of individuals who viewed banner ads, advertising on kids' websites is likely to be aimed at child viewers. We also used the comScore Key Measures Report⁷ to extract the average number of unique visitors to individual third-party kids' websites for January through December 2016. For each website, we calculated the proportion of total unique visitors who were children by dividing the average number of child (2-12 years) visitors⁸ by total unique visitors (2+ years) to the same website.⁹

We also measured the total banner ad impressions on **social media sites** (Facebook and YouTube) in 2016. The proportion of ads viewed on Facebook and YouTube was calculated by dividing total banner ad impressions for the company, brand, or promotion on each social media website by the total banner ad impressions that appeared on all websites from January through December 2016.

Visits to food company websites

To identify **food company websites**, we obtained a list of websites for the companies in our analysis that existed during January through December 2016 from comScore Media Metrix. For the purposes of this analysis, a website is defined as all pages containing the same stem URL. For example, McDonalds.com is the website of interest, while <https://www.mcdonalds.com/us/en-us/deals.html> is an example of a secondary page contained within the site.

We obtained data on visitors to these websites from comScore Media Metrix Key Measures Report, including visits by children (ages 2-12) and teens (ages 13-17).¹⁰ The Media Metrix database provides internet exposure data for any websites that were visited by at least 31 comScore panel members in a given quarter.¹¹ Media Metrix also provides exposure information by visitor age for higher volume websites.

For each quarter during the January through December 2016 period, we used the Media Metrix Key Measures Report to collect total unique visitors for available food company websites. In addition, when enough website traffic was recorded in a given quarter we collected these measures separately for children (2-12 years), teens (13-17 years), and the total internet audience (2+ years). We excluded non-U.S. URLs, websites promoting other types of products (e.g., household cleaners, beauty products), and corporate websites.

For each website in our analysis, we report the **average monthly unique visitors** who were children (2-12 years) or teens (13-17 years). This measure was calculated by adding average total unique visitors per month (reported quarterly by comScore, from January through December 2016) for each age group divided by four (for four quarters). If an individual website did not have comScore data for four quarters, average monthly unique viewers was calculated based on the number of monthly viewers for the quarters provided divided by four.

For each website, we also calculated the **% of total unique visitors** who were children and teens by dividing the average number of unique child (2-12 years) and teen (13-17 years) visitors¹² by total unique visitors (2+ years) to the same website.¹³

Unmetric data

In this analysis, we measured popularity and activity of company-sponsored social media accounts in 2016 using syndicated market research data from Unmetric. Unmetric is a web-based analytic software company that monitors and collects branded

social media content from over 100,000 brands.¹⁴ We examined four social media platforms that are popular with children and teens: Facebook, Twitter, Instagram, and YouTube.¹⁵

Researchers entered the name of all companies and brands analyzed in this report into the Unmetric database to identify all social media accounts that were active on Facebook, Twitter, Instagram, and YouTube during January-December 2016. We then identified the primary U.S. account for each company or brand for analysis, excluding: 1) promotional accounts or accounts created for specific audiences (e.g. “Little Caesars Pizza Kit Fundraising Program” or “General Mills Cereal Coupons”); and 2) social media accounts in a language other than English or based outside the United States, with the exception of worldwide accounts that were the only ones available for the company or brand.

Finally, we conducted additional manual searches of social media platforms using the company and the brand as keywords to check for missing or incomplete data. If they identified an account that was active in 2016 but data were not available from Unmetric, the account name only is reported.

The following measures were obtained from the Unmetric database:

- **Facebook fans.** The number of users who “liked” the company’s or brand’s Facebook page as of December 31, 2016.
- **Facebook posts.** The total number of unique posts that the company or brand shared on its Facebook page in 2016.
- **Twitter followers.** The number of users who “followed” the company or brand on Twitter as of December 31, 2016.
- **Tweets.** The total number of tweets (excluding retweets and replies to users) posted by the company or brand on Twitter in 2016.
- **Instagram followers.** The number of users who “followed” the company or brand on Instagram as of December 31, 2016.
- **Instagram posts.** The total number of unique posts, such as images or videos, that the company or brand shared on its Instagram page in 2016.
- **YouTube video views.** The total number of views for the videos uploaded in 2016. A view is counted after a user has watched a video for approximately 30 seconds.
- **Uploaded YouTube videos.** The total number of new videos uploaded by the company or brand to its YouTube channel in 2016.

If an account was not active for the full-year 2016, the number of Facebook and Instagram posts and tweets were prorated to provide full-year equivalents. In addition, researchers identified all active social media accounts for individual brands and companies, and calculated the mean number of social media platforms per account. Medians and ranges were also calculated for each social media measure.

Companies and brands in the analyses

To evaluate the companies and brands with food-related advertising directed to children, we used the list of all food, beverage, and restaurant companies with advertising spending in 2016 obtained from Nielsen. We first identified **CFBAI companies** that participated in the CFBAI as of July 2016, according to the program website.¹⁶ Within CFBAI companies, we further differentiated between **CFBAI companies with child-directed advertising** – those that have pledged to advertise only healthier dietary choices to children – from **CFBAI companies that did not engage in child-directed advertising** – those that pledged to not engage in child-directed advertising (for any of their products) as of January 2017.¹⁷ We also identified **CCAI companies** that belonged to the Children’s Confection Advertising Initiative (CCAI) as of January 1, 2017 according to the program website.¹⁸

We then identified all brands from CFBAI companies with advertising spending in 2016. Using the CFBAI published list of products that may be in child-directed advertising as of July 2016,¹⁹ we differentiated CFBAI company brands into two categories: 1) **CFBAI listed brands** included brands with at least one individual product that participants indicated may be the subject of child-directed advertising; and 2) **CFBAI non-listed brands** included all other brands from CFBAI companies. There were no products from these brands on the CFBAI published list of products.

We also categorized CFBAI company brands into **CFBAI top-50 brands**, which included brands that ranked among the 50 brands advertised most to children on TV in 2016, and **CFBAI less-advertised brands**, for all other CFBAI company brands with advertising spending in 2016. CFBAI top-50 brands and CFBAI less-advertised brands include both listed and non-listed brands.

Given the large number of food-related companies that did not participate in CFBAI or CCAI, we also identified subsets of **non-participating companies** with food, beverage, or restaurant brands for further analysis. **Non-participating top-50 companies** included all food, beverage, and restaurant companies that did not belong to the CFBAI or CCAI and had at least one top-50 brand in 2016 (i.e., one of the 50 brands with the highest number of TV advertisements viewed by 2- to 11-year-olds). A subset of non-participating top-50 companies was examined, **non-participating companies with child-directed brands**, which included companies with at least one brand that directed advertising to children in 2016, as evidenced by advertising on children’s TV and ratios of ads viewed by children versus adults greater than 0.74 (i.e., the difference in amount of time spent watching TV by children vs. adults).

Finally, we identified a subset of non-participating companies that advertised products in healthier food and beverage categories to children: **non-participating companies with healthy brands**. These companies had at least one brand in

the fruit, vegetable, dairy, plain water, or nut categories, and children (ages 2-11) saw on average 10 or more TV ads for the company in 2016.

Nutrition information

We collected nutrition information for all packaged food and drink products offered by CFBAI listed brands, as well as products offered CFBAI non-listed brands that ranked among the top-50 most advertised to children under 12 in 2016. This analysis excluded fast food kids' meals from McDonald's and Burger King (the two participating fast food restaurants). We compiled a list of all products offered by the selected brands and collected nutrient and ingredient information between May and July 2017.²⁰ Additionally, we identified all products from CFBAI company brands that were included on the list of products that may be advertised to children published by the CFBAI in January 2017.²¹

When information for specific products was not available on company websites, we searched for the products at grocery and convenience stores in the Hartford, Connecticut area. If the products were not available at local stores, we called the companies at least two times to obtain nutrition and ingredient information. Based on these calls, we identified products that had been discontinued as of May 2017. These products are not included in our analysis. In some cases, nutrition information for products not available on company websites was obtained from the CFBAI pledge product information posted on the CFBAI program website.²²

Complete nutrient content and ingredient lists for most products were available on company or brand websites, with the exception of The Kraft Heinz Company brands which were not available online for all products. Kraft representatives on the customer service phone number explained that the company's products are continually modified and the product package is the only reliable source of nutrition information. We were able to collect nutrition information for most Kraft Heinz brands from product packaging in local stores. However, none of the listed Lunchable products were available locally. For those products, colleagues in other states found the products and provided us with the nutrition information.

The nutrition information for packaged food and drinks in these analyses are reported per serving size as stated on products' nutrition facts panels. We also identified specific ingredients and the order they were listed on the nutrition facts panels.

The following nutrition content measures are reported by brand and category:

- **Nutrition information** refers to serving size (g), calories (kcal), total fat (g), saturated fat (g), total sugar (g), sodium (mg), fiber (g), and protein (g) per serving as provided on the product nutrition facts panel. Medians and ranges are reported.

- **Ingredient information** refers to the presence or absence of specific components of a product as indicated on the ingredient list on the nutrition facts panel.

- **Main ingredient** describes any ingredient listed as one of the first five components of a product as indicated on the ingredient list of the nutrition facts panel.

- Products with **added sugars** include products with any type of added sugar listed in the nutrition facts panel, including syrups (agave, corn, cane, brown rice, glucose, and high fructose corn), sugar, dextrose, sucrose, lactose, fructose, and honey. Grams of added sugars are not specified in the nutrition labels, therefore only total sugar content is reported in this analysis.

- Products with **non-nutritive sweeteners** include products with any type of sweetener that does not contribute a significant amount of calories, including acesulfame-K (Sweet One), aspartame (NeutraSweet), sucralose (Splenda), and stevia.

Evaluation of nutritional quality

We used three nutrition standards to evaluate the nutritional quality of the food and drinks included in this report. We compared the nutrients and ingredients in each product to the CFBAI category-specific uniform nutrition criteria, the United States Department of Agriculture (USDA) Smart Snacks nutrition standards, and the Nutrition Profiling Index (NPI) score.²³

The CFBAI category-specific uniform nutrition criteria and Smart Snacks nutrition standards set specific nutrition requirements that differ by food and beverage category. Both establish limits for the amount of energy, saturated fat, sodium, and sugar permitted for products in different categories and also set nutrient requirements or ingredients to encourage (e.g. ½ serving of whole grain, have vegetable as first ingredient). The NPI scoring system uses a nutrient profiling model to provide an overall nutrition score that ranges from 0 to 100. The model evaluates total calories and composition of both nutrients to limit and nutrients and food groups to encourage per 100g of product.

CFBAI category-specific uniform nutrition criteria and Smart Snacks nutrition standards

In 2011, the CFBAI introduced the **CFBAI category-specific uniform nutrition criteria** to identify products that may be in child-directed advertising. These standards were to be fully implemented by 2013.²⁴ The CFBAI conducted a review of the Dietary Guidelines for Americans 2010, third-party nutrition standards, and public health concerns to develop these criteria. Prior to 2011, each participating company had developed its own nutrition criteria for products that may be advertised to children.²⁵ The CFBAI category-specific uniform nutrition criteria classify food and drinks into 10

main product categories, one of which has 4 subcategories, and each category or subcategory has its own nutrition standards. CFBAI nutrition criteria specify four nutrients to limit (calories, saturated fat, sodium, and total sugars) and nutrition components to encourage (e.g. 1 cup of dairy, 10% daily value of any essential nutrient) that vary by product category. Sugar-free mints and gum, fruit products without added sugars, vegetable products without added fats, and low sodium, water, and “low calorie” beverages are exempt from the nutrient criteria.

Smart Snacks nutrition standards were developed as part of the Healthy, Hunger-Free Kids Act passed by Congress in 2010. The USDA was directed to update nutrition standards for competitive foods sold in schools. Competitive foods are defined by the Centers for Disease Control and Prevention (CDC) as “foods sold or available in schools outside of federally reimbursable school meals programs.”²⁶ The Smart Snacks standards apply to foods sold in schools a la carte (in a cafeteria or dining hall), in a school store, and in vending machines during the school day.²⁷ The final regulations, often referred to as “Smart Snacks,” went into effect in the 2014-15 school year.

Existing Smart Snacks standards specify six nutrients to limit: calories, sodium, total fat, saturated fat, trans fat, and total sugar. The standards set limits for total calories and sodium in a serving as packaged for sale, limits on total fat and saturated fat as a maximum percentage of total calories, and limits on sugar as a maximum percentage by weight. To qualify as Smart Snacks, products must contain 0 grams of trans fat (i.e., < 0.5 g per serving). Smart Snacks must also meet at least one of four criteria for nutrients to promote: they must be “whole grain-rich”; the first ingredient must be a fruit or vegetable; they must contain at least ¼ cup of fruit or vegetable; and/or they must contain at least 10% of the daily value of either calcium, potassium, vitamin D, or fiber.²⁸ The Smart Snacks standards also grant exceptions for canned and frozen fruits with no added ingredients and those that are packed in 100% juice, light syrup, or extra light syrup.²⁹ Exceptions to saturated fat and fat limits are also granted for nuts and low-fat cheese products.

Tables A1 and **A2** compare the CFBAI category-specific uniform nutrition criteria to the Smart Snacks standards for specific categories. The Smart Snacks snack item category encompasses four CFBAI food categories (i.e. yogurts; cheese; grain, vegetable products, and items not in other

Table A1. Comparison of CFBAI category-specific uniform nutrition criteria and Smart Snacks nutrition standards for nutrients to limit

CFBAI category-specific uniform nutrition criteria						USDA Smart Snacks nutrition standards					
Food category	Serving size**	Energy (kcal)	Saturated fat (g)	Sodium (mg)	Total sugars (g)	Food category	Energy (kcal)	Saturated fat	Total fat	Sodium (mg)	Sugar
Juices*	LSS	≤ 160	0	≤ 140	No added sugars	Juices*	n/a	n/a	n/a	n/a	n/a
Yogurts and yogurt-type products	6 oz	≤ 170	≤ 2	≤ 140	≤ 23	Snack items	≤ 200 calories	≤ 10% kcal	of total calories	≤ 200	≤35% weight from total sugars in foods
Cheese and cheese products***	LSS	≤ 80	≤ 3	≤ 110	≤ 2						
Grain, fruit and vegetable products, and items not in other categories	LSS	≤ 150	≤ 1.5	≤ 290	≤ 10						
	LSS	>150 - 200	≤ 2	≤ 360	≤ 12						
Seeds, nuts and nut butters and spreads***	1 oz or 2 tbsp	≤ 220	≤ 3.5	≤ 240	≤ 4	Meal items	≤ 350 calories	≤ 10% kcal	≤35% of total calories	≤ 480	≤35% weight from total sugars in foods
Mixed dishes	LSS	≤ 280	≤2.5	≤ 540	≤ 10						
Main dishes and entrées	LSS	≤ 350	≤ 10% kcal	≤ 600	≤ 15						
Small meals	LSS	≤ 450	≤ 10% kcal	≤ 600	≤ 17 / 12						
Meals (entrée) and other items including a beverage	Meal	≤ 600	≤ 10% kcal	≤ 740	≤ 20 / 15						

* Includes 100% fruit juice and fruit juice with water added

** LSS = listed serving size

*** Cheese and nuts are exempt from total fat and saturated fat limits

Source: CFBAI category-specific nutrition criteria³¹ and Smart Snacks nutrition standards³²

Table A2. Comparison of CFBAI uniform category-specific nutrition criteria and Smart Snacks nutrition standards for ingredients to encourage

CFBAI category-specific uniform nutrition criteria			USDA Smart Snacks nutrition standards	
Food category	Serving size**	Requirements	Food category	Requirements
Juices*	LSS	≥ ½ c F/V juices	Juices*	≤ 8 oz
Yogurts and yogurt-type products	6 oz	≥ ½ c dairy and ≥ 10% DV calcium	Snack items	Products must be whole grain-rich; have as the first ingredient a fruit, vegetable, dairy product or protein food; or be a combination food that contains at least 1/4 cup of fruit or vegetable or contain 10% of the Daily Value (DV) of a nutrient of public health concern in the 2010 Dietary Guidelines for Americans (calcium, potassium, vitamin D or dietary fiber)
Cheese and cheese products	LSS	≥ ½ c dairy equivalent (provides ≥ 10% DV calcium)		
Grain, fruit and vegetable products, and items not in other categories	LSS	≥ ½ serving of F/V/D/WG or ≥ 10% DV of any essential nutrient	Meal items	
Seeds, nuts and nut butters and spreads	1 oz or 2 tbsp	≥ 1 oz protein equivalent		
Mixed dishes	LSS	≥ ½ serving of F/V/D/WG or ≥ 10% DV of two essential nutrients		
Main dishes and entrees	LSS	≥ 1 serving of F/V/D/WG or ≥ ½ serving of F/V/D/WG and ≥ 10% DV of two essential nutrients		
Small meals	LSS	≥ 1½ servings of F/V/D/WG or ≥ 1 serving of F/V/D/WG and ≥ 10% DV of three essential nutrients		
Meals (entree) and other items including a beverage	Meal	≥ 2 servings of F/V/D/WG or ≥ 1½ servings of F/V/D/WG and ≥ 10% DV of three essential nutrients		

* Includes 100% fruit juice or vegetable and fruit/vegetable juice with water added

**LSS = listed serving size

Source: CFBAI category-specific nutrition criteria³³ and Smart Snacks nutrition standards³⁴

categories; and nut butters). The Smart Snacks meal item category encompasses four CFBAI food categories (i.e. mixed dishes, main dishes and entrees, small meals and meals).

Applying the CFBAI and Smart Snacks nutrition criteria

To apply the CFBAI nutrition criteria, we first classified products into the appropriate CFBAI food categories, using the notes section of the White Paper on CFBAI's Category-specific Uniform Nutrition Criteria as a guide.³⁰ However, was not readily apparent how to classify products in the "grain, fruit and vegetable products and items not in other categories" into category's two subcategories for different RACC sizes. In addition, correct assignment of products to the mixed dishes, main dishes and entrees, small meals, or meals categories was sometimes difficult to determine. When we could not determine the appropriate CFBAI product category, we looked at the specific company pledges to determine if the company indicated the category. Lastly, if those documents did not provide enough information to classify products, we compared the nutrition information of the listed products to the nutrition standards and assumed that listed products belonged to the category for which they

met the nutrition criteria. Subsequently, we compared the nutrition information from all the products included in this analysis and we determined which products exceeded the CFBAI nutrients to limit. We took a conservative approach and did not exclude any products that did not meet the CFBAI nutrition components to encourage.

In determining advertised products that meet the Smart Snacks standards, we examined the nutrients-to-limit criteria for calories, sodium, total fat, saturated fat, and total sugar. We estimated the nutrients-to-promote using the order of ingredients in the nutrition facts panel. For example, we assumed that products that listed whole grain flour before flour from refined grains would qualify as whole-grain rich. Products granted exemptions to the nutrients-to-limit criteria (e.g., reduced fat cheese, nuts, and some fruit) were also granted exemptions in this report.

The nutrition information for Kraft Macaroni & Cheese products posed a particular issue for the CFBAI and Smart Snacks standards. The nutrition facts panel provided weight and nutrition information for the uncooked macaroni and unprepared cheese sauce mix as well as for the prepared mix. However, preparation instructions for different varieties varied in the amount and type of milk and butter or margarine

specified, and nutrition information for the prepared product did not always match the type of butter or milk specified. For example, one variety prepared using 2 tablespoons of butter and 3 tablespoons of 1% lowfat milk reported that 1 cup contained 13 g of total fat, while another variety prepared with 4 tablespoons of margarine and one-quarter cup of milk (unspecified fat content) also contained 13g of total fat. Therefore, to standardize the preparation of Kraft Macaroni & Cheese Blue Box products, we used the instructions from Blue Box “Cars,” which matched the nutrients listed on Kraft’s CFBAI pledge for one prepared cup of Kraft Macaroni & Cheese.³⁵ The package used 2 tablespoons of margarine and 3 tablespoons of 1% milk to prepare. Based on that product’s nutrition panel, we added 30 calories, 3 grams of fat, 2 grams of saturated fat, 10 milligrams of sodium, 1 gram of total sugar, and 2 grams of protein (i.e., the difference between the unprepared and prepared nutrition information) to the nutrition information reported on the nutrition facts panel for the uncooked macaroni and unprepared cheese sauce for all Blue Box products. The preparation instructions for all Deluxe and Microwaveable varieties did not vary, so we used the reported nutrition information for those products.

NPI score

The **NPI score** is based on the nutrition rating system established by University of Oxford researchers for the Food Standards Agency in the United Kingdom.³⁶ Their Nutrient Profiling model (NPM) is currently used by the U.K. Office of Communications (OFCOM) to identify nutritious foods that can be advertised to children on TV.³⁷ The model also has been approved by Food Standards Australia New Zealand to identify products that are permitted to use health claims in their marketing.³⁸ The NPM provides one score for each product based on total calories and composition of both nutrients to limit (i.e., saturated fat, sugar, and sodium) and nutrients and food groups to encourage (i.e., fiber, protein, and unprocessed fruit, nut, and vegetable content).

The NPM has several advantages over other nutrient profiling systems. Researchers developed the model independently of food industry funding; its development and scoring method is publicly documented and transparent; and it has been validated to reflect the judgment of professional nutritionists.³⁹

The model also produces a continuous score that provides a relative evaluation of products, in contrast to threshold models that classify foods as “healthy” or “unhealthy.” In addition, the model includes only nutrients that are reasonable and well-justified based on existing nutrition science. In particular, the model does not award points for micronutrient fortification, thereby not rewarding vitamins and minerals added to inherently unhealthy products.

However, it is difficult to interpret the original scores produced by the NPM as it is reverse scored (i.e., a higher score indicates a product of worse nutritional quality). Scores range from +34 (worst) to –15 (best), with a score of 3 points or lower identifying healthy foods that can be advertised on children’s TV programs or during programs with a disproportionate number of viewers under 16 years old in the United Kingdom. Therefore, we created a Nutrient Profiling Index (NPI) score using the following formula: $NPI\ score = (-2) * NPM\ score + 70$. For example, a relatively nutritious food with an NPM score of -3 would receive an NPI score of 76 ($-2 * -3 + 70$). This recalculation produces a score from 0 (poorest nutritional quality) to 100 (highest nutritional quality) that is easier to interpret and compare.

We calculated the NPI score for all food and drink products in our analysis. To identify packaged food products with a healthy nutrient composition, we used the cut-offs established by the U.K. OFCOM to identify healthy products.⁴⁰ A NPM score <4 translates to a revised NPI score of 64 or higher to qualify as a healthy food product that can be advertised to children on TV; while a NPM score of <1 translates to a revised NPI score of 70 or higher to qualify as a healthy drink that can be advertised to children on TV.

For nearly all products examined, the nutrition facts panel provided the necessary nutrition information to calculate the NPI score. However, the nutrition facts panel for Kraft Macaroni & Cheese did not list the weight of the prepared serving size. To calculate the weight for the NPI score, we measured and cooked the “Original” flavor for each of the three Kraft Macaroni and Cheese varieties (Blue Box, Deluxe, and Microwaveable) according to package instructions to determine the weight of the cooked macaroni with reconstituted sauce.

COMPANY PROFILES: ALPHABETICAL ORDER

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American Licorice Company

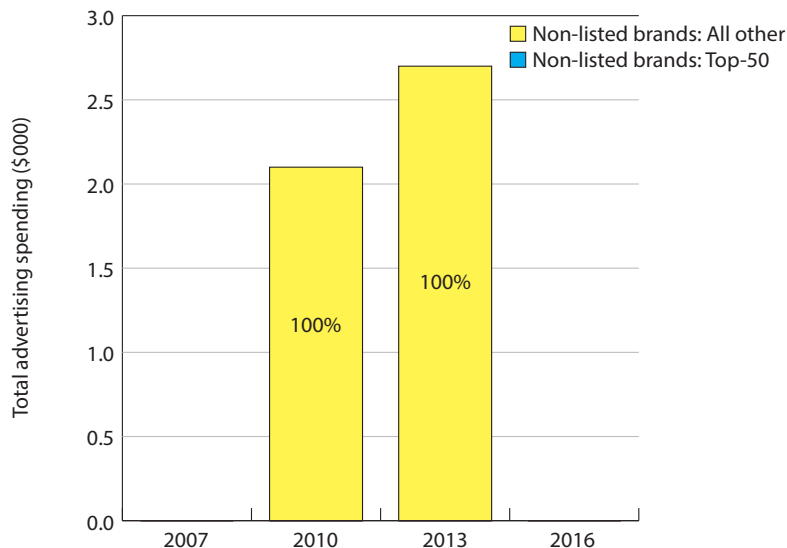
Joined the Children's Food and Beverage Advertising Initiative (CFBAI): May 2015

This company has pledged to not engage in child-directed advertising and did not have any top-50 brands in 2016.



Traditional advertising

Total advertising spending in 2016: \$2,808



Source: Rudd Center analysis of Nielsen data (2017)

This company did not advertise on English-language TV in any of the years examined.

Digital marketing

Social media activity in 2016¹

Top-50 non-listed brands and company accounts

Account name	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
American Licorice Company	431	**		

**Active accounts in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#18
Total advertising spending on CFBAI listed brands	n/a
TV advertising viewed by children ages (2-11)	#18
TV advertising viewed by young teens (12-14)	#18
Child visitors to company websites	n/a
Banner advertising on kids' websites	n/a
Banner advertising on social media sites	n/a
Total Facebook fans for CFBAI listed brands	#17
Total YouTube video views for CFBAI listed brands	n/a

¹Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

Applebee's Grill & Bar

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$123 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	36.1	0.42
Children (6-11 y)	39.8	0.46
Young teens (12-14 y)	47.8	0.56

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Applebee's Grill & Bar	174	<1%	42,791	35%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
Applebees.com	22.1	17.7	4%	3%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Applebee's Grill & Bar	5,953	595	154	1,338

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Arby's

Non-participating company: Top 50-brand

**Traditional advertising**

Total advertising spending in 2016: \$150 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	34.7	0.48
Children (6-11 y)	37.9	0.53
Young teens (12-14 y)	52.4	0.73

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Arby's	2,645	709	71	7,720

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
 Source: Rudd Center analysis of Unmetric data (January - December 2016)

The Bel Group

Non-participating company with top-50 child-directed brands

Child-directed brands



Traditional advertising

Total advertising spending in 2016: \$49 million

Mini Babybel: \$27 million

Laughing Cow: \$12 million

Laughing Cow Cheese Dippers Snacks: \$9 million

TV ads viewed in 2016

	Mini Babybel		Laughing Cow		Laughing Cow Cheese Dippers Snacks	
	Avg # of ads viewed	Child:adult targeted ratio	Avg # of ads viewed	Child:adult targeted ratio	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	15.1	1.65	16.5	1.81	10.6	1.54
Children (6-11 y)	7.6	0.83	8.1	0.88	5.3	0.77
Young teens (12-14 y)	5.7	0.62	5.9	0.65	4.0	0.58

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

Brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
The Bel Group	34	1%	263	6%

Source: comScore Admetrix Advertiser report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
The Bel Group (Laughing Cow Cheese)	314	10	7	2,556
The Bel Group (Babybel)	127	5	**	1,676

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Birds Eye

Non-participating company with a healthy brand



Traditional advertising

Total advertising spending in 2016: \$4 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	7.4	0.67
Children (6-11 y)	5.0	0.36
Young teens (12-14 y)	5.1	0.45

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Birds Eye	843,322	16		**

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Brown & Haley

Joined the Children's Confection Advertising Initiative (CCAI): June 2016

**Traditional advertising**

Total advertising spending in 2016: \$6,700

This company had no TV advertising in 2016

Digital marketing

Active social media accounts in 2016*

	Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
almondroca		6	**		

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views


**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Burger King Corporation

Joined the Children's Food and Beverage Advertising Initiative (CFBAI): September 2007

Top-50 brands¹ in TV advertising viewed by children in 2016

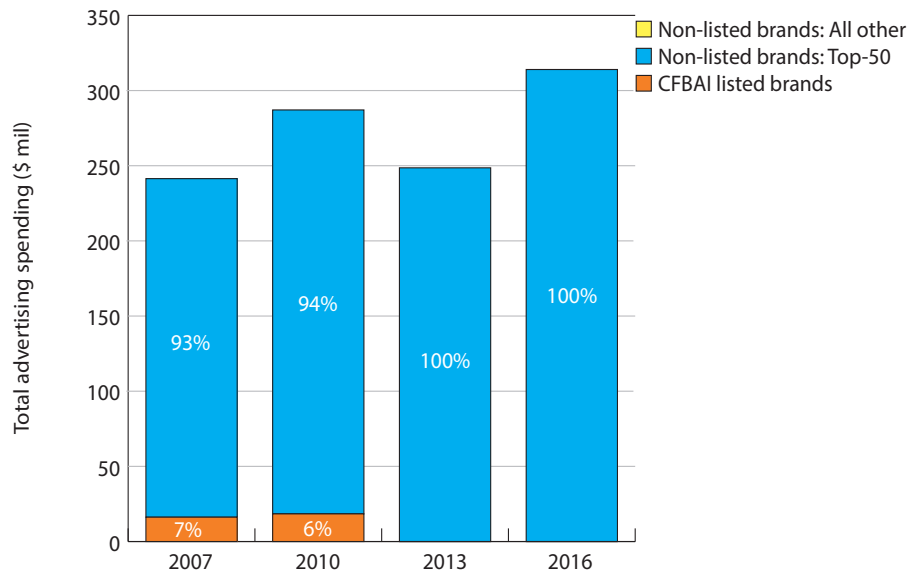
CFBAI listed brands ² that may be in child-directed advertising	Non-listed brands
None	 <p>All other products (not Kids' Meals)</p>

Less-advertised CFBAI listed brands³

Kids' Meals

Traditional advertising

Total advertising spending in 2016: \$314 million, 0% on CFBAI listed brands

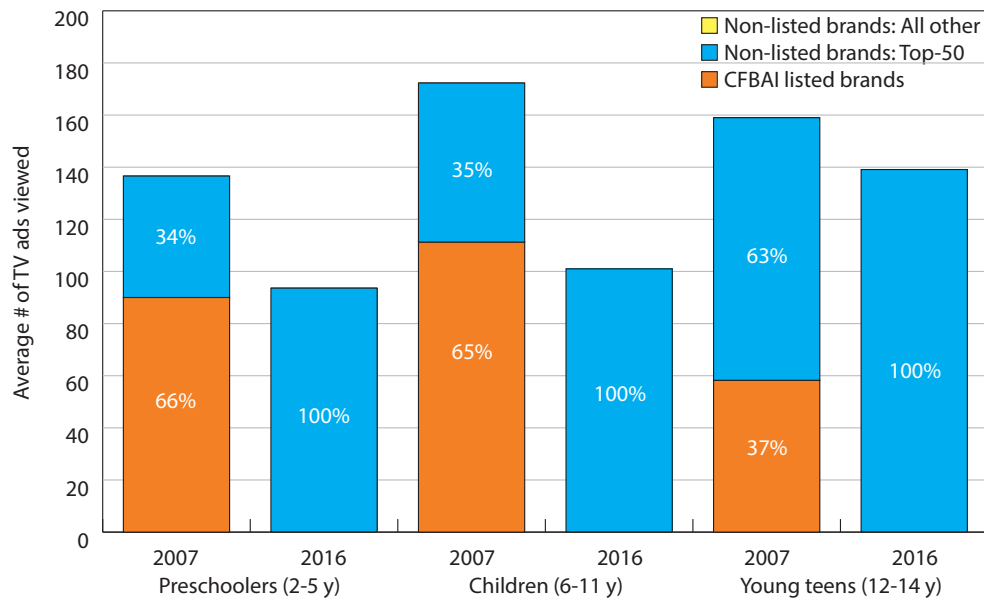


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	CFBAI listed brands			Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio	% of company total	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	0.0		0%	93.6	0.40
Children (6-11 y)	0.0		0%	101.0	0.43
Young teens (12-14 y)	0.0		0%	139.1	0.59

Source: Rudd Center analysis of Nielsen data (2016)



Source: Rudd Center analysis of Nielsen data (2017)

Digital marketing

Social media activity in 2016⁴

Top-50 non-listed brands and company accounts

Account name	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Burger King	7,512	1,454	445	6,688

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#9
Total advertising spending on CFBAI listed brands	n/a
TV advertising viewed by children ages (2-11)	#8
TV advertising viewed by young teens (12-14)	#7
Child visitors to company websites	#10
Banner advertising on kids' websites	n/a
Banner advertising on social media sites	n/a
Total Facebook fans	#7
Total YouTube video views	#9

Nutrition

CFBAI listed kids' meals

Main dish	Side	Drink	Total calories (kcal)	Saturated fat (g)	Total sugar (g)	Sodium (mg)	Exceeds Smart Snack limits	Nutrients of concern
Hamburger	Apple sauce	100% fruit juice	360	3	37	485	✓	Calories, sodium
Hamburger	Apple sauce	Fat free milk	370	3	29	585	✓	Calories, sodium
Chicken nuggets	Apple sauce	Fat free milk	410	3.5	24	845	✓	Calories, sodium

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views


Campbell Soup Company

Joined the Children's Food and Beverage Advertising Initiative (CFBAI): November 2006

Top-50 brands¹ in TV advertising viewed by children in 2016

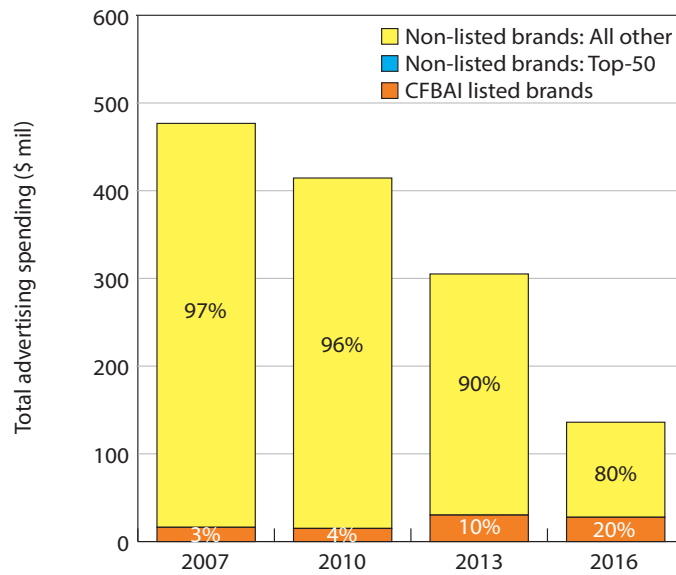
CFBAI listed brands ² that may be in child-directed advertising	Non-listed brands
	None

Less-advertised CFBAI listed brands³



Traditional advertising

Total advertising spending in 2016: \$136 million, 20% on CFBAI listed brands

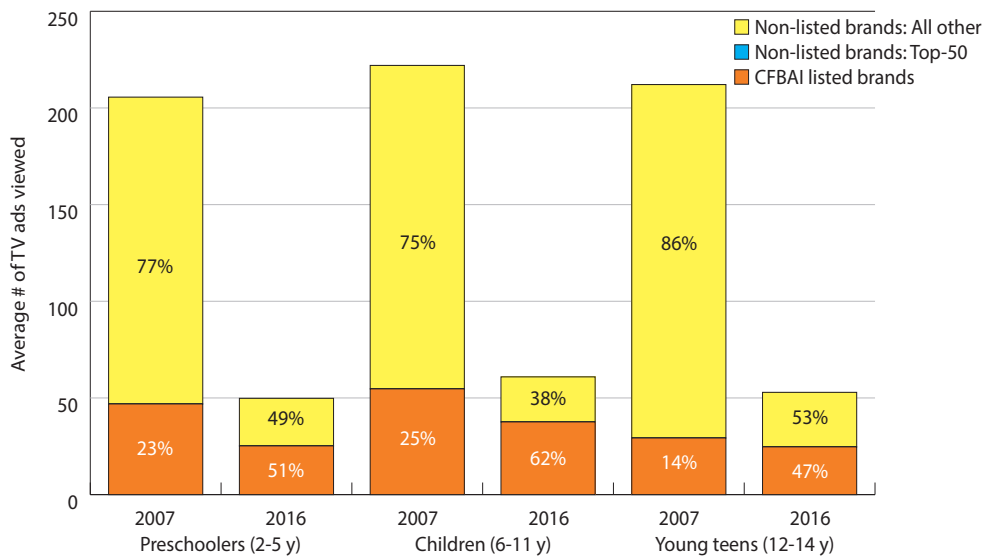


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	CFBAI listed brands			Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio	% of company total	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	25.2	1.84	51%	24.6	0.39
Children (6-11 y)	37.6	2.74	62%	23.3	0.37
Young teens (12-14 y)	24.7	1.80	47%	28.2	0.44

Source: Rudd Center analysis of Nielsen data (2016)



Source: Rudd Center analysis of Nielsen data (2017)

Digital marketing

Social media activity in 2016⁴

CFBAI listed brands

Brand	Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Pepperidge Farm Goldfish	✓	641	33	5	149
Bolthouse Farms		595	17	13	765

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#13
Total advertising spending on CFBAI listed brands	#7
TV advertising viewed by children ages (2-11)	#12
TV advertising viewed by young teens (12-14)	#14
Child visitors to company websites	#13
Banner advertising on kids' websites	n/a
Banner advertising on social media sites	n/a
Total Facebook fans	#12
Total YouTube video views	#11

Nutrition

CFBAI listed brands

Brand	Top-50 brand	Products		Nutrition for listed products	
		# products	% included on CFBAI list of child-directed products ²	NPI score Median (range)	% meeting Smart Snacks standards
Pepperidge Farm Goldfish	✓	30	57%	40 (12-48)	12%
Bolthouse Farms		1	100%	78	0%

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

Chili's Grill & Bar

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$96 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	23.7	0.43
Children (6-11 y)	26.5	0.48
Young teens (12-14 y)	34.3	0.62

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
Chilis.com	12.8	7.8	3%	2%
ChilisToGo.com	8.8	4.1	4%	2%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Chili's Grill & Bar	4,008	348	103	4,754

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Chobani

Non-participating company with a healthy brand



Traditional advertising

Total advertising spending in 2016: \$43 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	8.5	0.41
Children (6-11 y)	8.1	0.40
Young teens (12-14 y)	10.6	0.52

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Chobani	1,162	104	32	25,719

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

Chuck E. Cheese's

Non-participating company: Top-50 child-directed brand

CHUCK E. CHEESE'S®

Traditional advertising

Total advertising spending in 2016: \$28 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	147.1	4.42
Children (6-11 y)	108.6	3.26
Young teens (12-14 y)	58.5	1.76

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Chuck E. Cheese's	1,523	2%	1,125	9%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
ChuckEcheese.com	139.4	16.8	42%	5%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Bold indicates higher percentage of visitors for this website than for the total internet.

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Chuck E. Cheese's	952	21	**	40,615

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

The Coca-Cola Company

Joined the Children's Food and Beverage Advertising Initiative (CFBAI): November 2006

Top-50 brands¹ in TV advertising viewed by children in 2016

This company has pledged to not engage in child-directed advertising

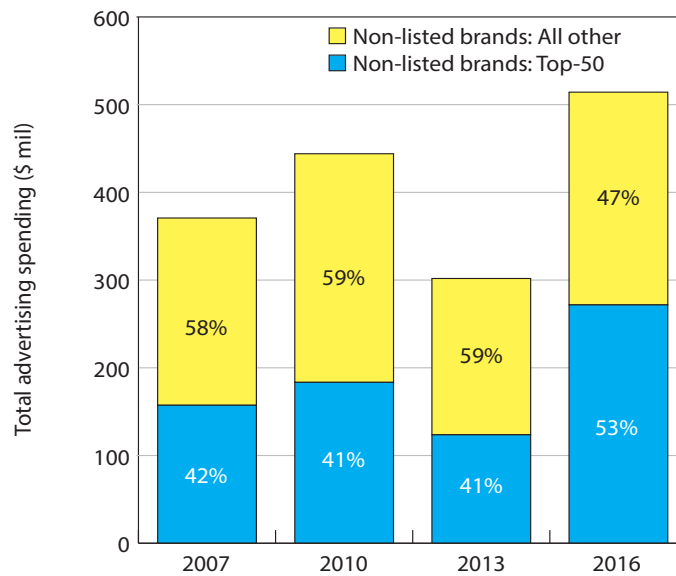
None

Non-listed brands



Traditional advertising

Total advertising spending in 2016: \$514 million

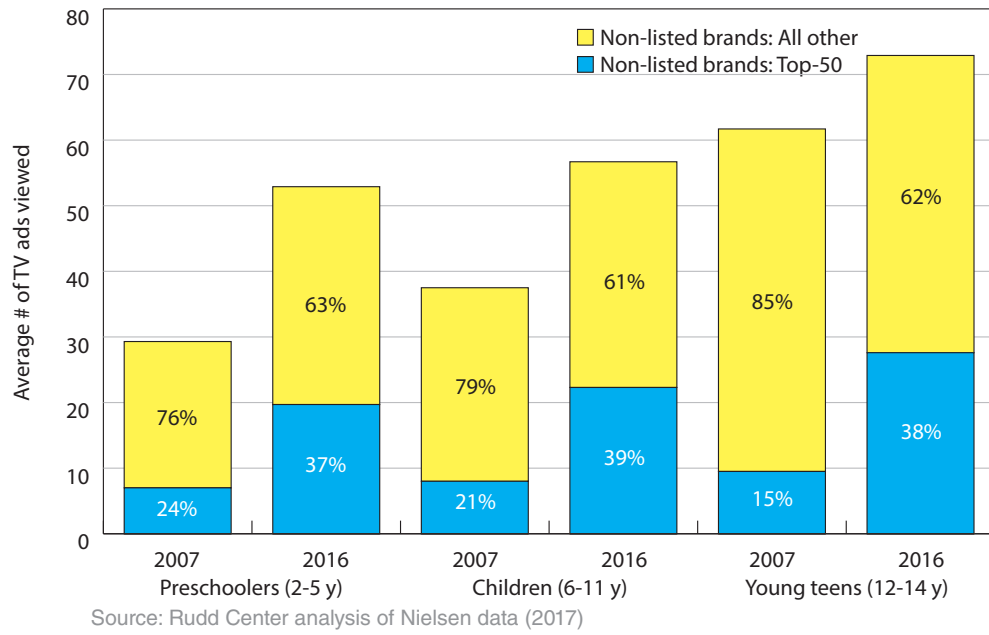


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	52.9	0.44
Children (6-11 y)	56.7	0.48
Young teens (12-14 y)	72.8	0.61

Source: Rudd Center analysis of Nielsen data (2016)



Digital marketing

Banner advertising on third-party websites in 2016⁴

Brand	Top-50 brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
		# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Coca-Cola	✓	10,633	2%	64,592	11%
Fanta		4,197	4%	8,151	7%
Dasani		2,713	3%	10,143	11%
Diet Coke		1,434	3%	1,764	4%
Glaceau		1,390	1%	4,315	2%
Mello Yello		1,340	6%	1,321	6%
Diet Coke Lime		1,337	6%	1,306	6%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016⁵

Website	Top-50 brand	Avg monthly unique visitors (000)		% of total unique visitors ⁶	
		2-12 years	13-17 years	2-12 years	13-17 years
Coca-Cola.com	✓	13.1	9.7	13%	9%
Coca-ColaStore.com	✓	12.7	3.8	30%	9%
MyCokeRewards.com	✓	11.5	13.6	2%	2%
Coca-ColaCompany.com	✓	8.2	6.5	5%	4%
Powerade.com		1.8	1.6	10%	9%
Total Coca-Cola Company sites		39.2	39.4	4%	4%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Social media activity in 2016⁷

Top-50 non-listed brands and company accounts:

Account name	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Coca-Cola	12,651	3,308	775	1,245,322

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#5
Total advertising spending on CFBAI listed brands	n/a
TV advertising viewed by children ages (2-11)	#13
TV advertising viewed by young teens (12-14)	#10
Child visitors to company websites	#7
Banner advertising on kids' websites	#4
Banner advertising on social media sites	#5
Total Facebook fans	#2
Total YouTube video views	#1

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

⁵Includes individual websites for CFBAI listed, non-listed, and top-50 brands that averaged 1,000+ unique child visitors per month in 2016, excluding company-level websites (e.g., GeneralMills.com). Includes individual websites for less-advertised brands that averaged 5,000+ unique child visitors or had audience shares that exceeded the share of child and teen visitors to the total internet in 2016.

⁶Bold indicates higher percentage of visitors for this website than for the total internet

⁷Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

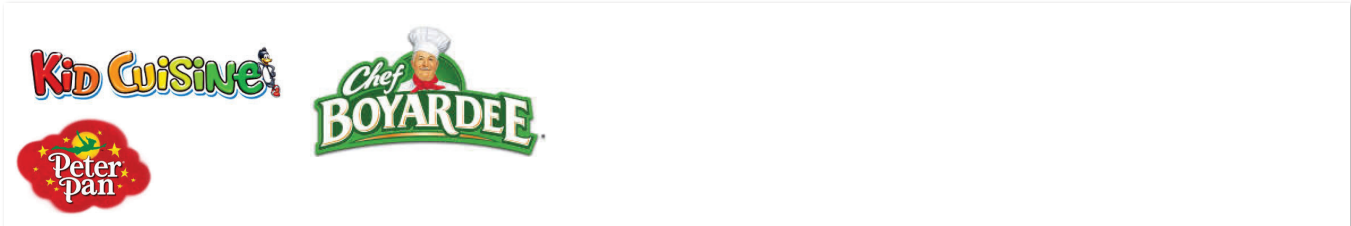
ConAgra Foods

Joined the Children's Food and Beverage Advertising Initiative (CFBAI): October 2007

Top-50 brands¹ in TV advertising viewed by children in 2016

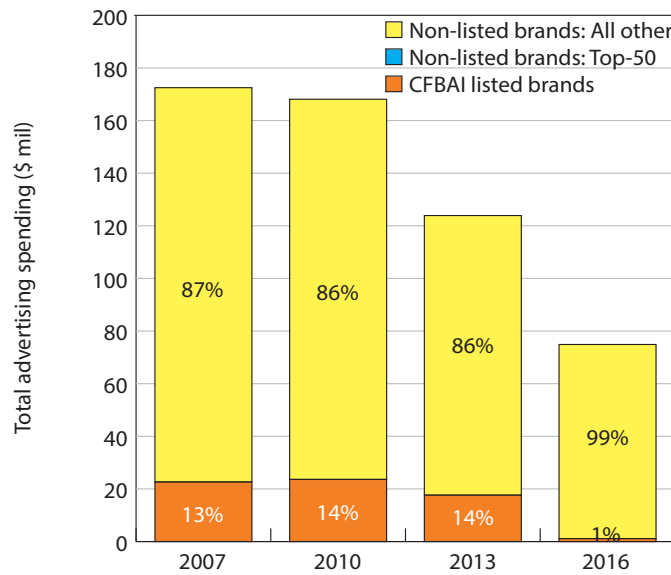
CFBAI listed brands ² that may be in child-directed advertising	Non-listed brands
None	None

Less-advertised CFBAI listed brands³



Traditional advertising

Total advertising spending in 2016: \$75 million, 1% on CFBAI listed brands

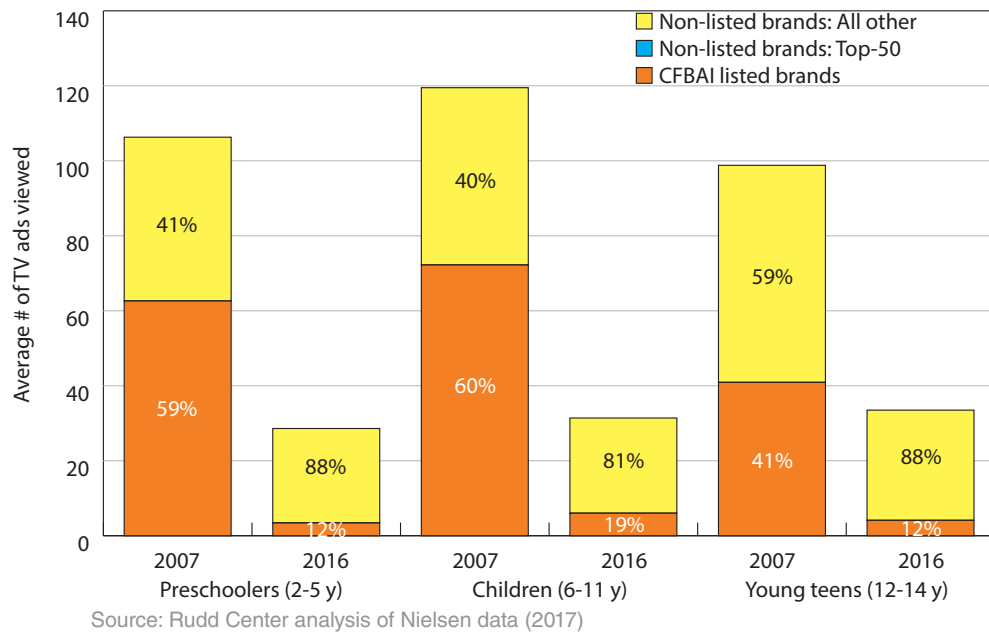


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	CFBAI listed brands			Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio	% of company total	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	3.4	3.81	12%	25.2	0.42
Children (6-11 y)	6.0	6.68	19%	25.4	0.42
Young teens (12-14 y)	4.1	4.58	12%	29.4	0.49

Source: Rudd Center analysis of Nielsen data (2016)



Digital marketing

Banner advertising on third-party websites in 2016⁴

Brand	CFBAI listed brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
		# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Healthy Choice		3,123	4%	6,552	8%
Hebrew National		2,188	2%	4,785	3%
Snack Pack		2,099	2%	8,927	8%
Reddi Wip		1,557	1%	25,037	12%
Banquet Frozen Meals		1,543	1%	6,933	4%
Kid Cuisine	✓	1,460	77%	0	0%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Social media activity in 2016⁵

CFBAI listed brands

Brand	Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Chef Boyardee		460	10	**	907
Peter Pan Peanut Butter		81	**		

**Active accounts in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#16
Total advertising spending on CFBAI listed brands	#9
TV advertising viewed by children ages (2-11)	#16
TV advertising viewed by young teens (12-14)	#16
Child visitors to company websites	#12
Banner advertising on kids' websites	#8
Banner advertising on social media sites	#6
Total Facebook fans	#13
Total YouTube video views	#12

Nutrition

CFBAI listed brands

Brand	Top-50 brand	Products		Nutrition for listed products	
		# products	% included on CFBAI list of child-directed products ⁵	NPI score Median (range)	% meeting Smart Snacks standards
Chef Boyardee		44	25%	72 (70-76)	0%
Kid Cuisine		11	82%	72 (68-74)	33%
Peter Pan		13	69%	56 (54-66)	11%

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

⁵Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook likes or 1 million YouTube views.

⁶As of January 2017

Dairy Queen

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$127 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	34.2	0.41
Children (6-11 y)	34.9	0.42
Young teens (12-14 y)	42.8	0.52

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Dairy Queen	33	<1%	2,836	22%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
DairyQueen.com	6.1	13.6	3%	6%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Dairy Queen	10,239	417	162	470

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

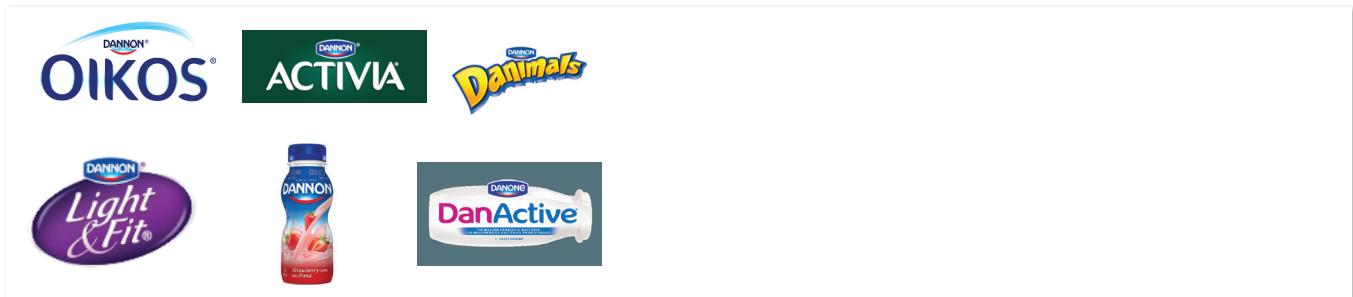
The Dannon Company

Joined the Children's Food and Beverage Advertising Initiative (CFBAI): September 2008

Top-50 brands¹ in TV advertising viewed by children in 2016

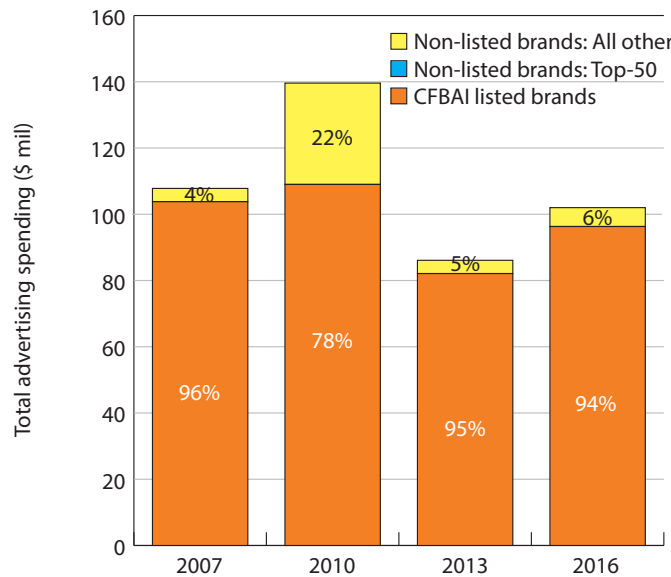
CFBAI listed brands ² that may be in child-directed advertising	Non-listed brands
None	None

Less-advertised CFBAI listed brands³



Traditional advertising

Total advertising spending in 2016: \$102 million, 94% on CFBAI listed brands

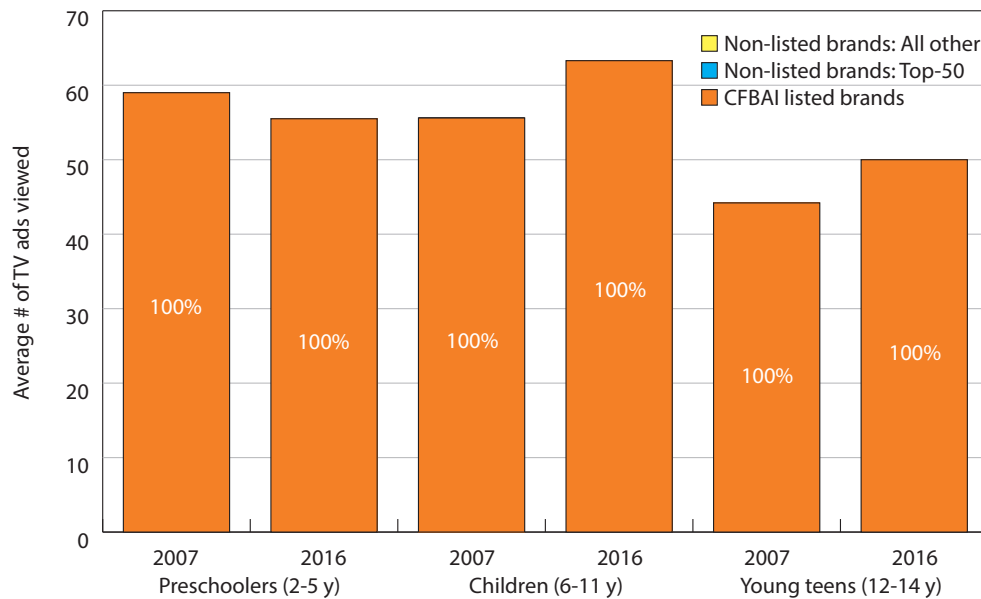


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	CFBAI listed brands			Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio	% of company total	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	55.5	0.67	100%	0.0	0.00
Children (6-11 y)	63.3	0.00	100%	0.0	0.00
Young teens (12-14 y)	50.2	0.00	100%	0.0	0.00

Source: Rudd Center analysis of Nielsen data (2016)



Source: Rudd Center analysis of Nielsen data (2017)

Digital marketing

Banner advertising on third-party websites in 2016⁴

Brand	CFBAI listed brand	Top-50 brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
			# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Dannon, Activia, Light & Fit	✓		1,094	2%	4,238	7%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016⁵

Website	CFBAI listed brand	Top-50 brand	Avg monthly unique visitors (000)		% of total unique visitors ⁶	
			2-12 years	13-17 years	2-12 years	13-17 years
Activia.com	✓		11.6	5.4	23%	13%
Danimals.com	✓		2.2	1.1	18%	9%
Total Dannon company sites			14.8	8	13%	7%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Social media activity in 2016⁷

CFBAI listed brands

Brand	Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Activia		456	6		15,419
Danimals		318			
Light & Fit Yogurt		864		**	**
Oikos Yogurt		571	22	**	16,516

Top-50 non-listed brands and company accounts

Account name	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
The Dannon Company	3			

**Active accounts in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#14
Total advertising spending on CFBAI listed brands	#4
TV advertising viewed by children ages (2-11)	#11
TV advertising viewed by young teens (12-14)	#15
Child visitors to company websites	#11
Banner advertising on kids' websites	#12
Banner advertising on social media sites	#13
Total Facebook fans	#9
Total YouTube video views	#5

Nutrition

CFBAI listed brands

Brand	Top-50 brand	Products		Nutrition for listed products	
		# products	% included on CFBAI list of child-directed products ⁸	NPI score Median (range)	% meeting Smart Snacks standards
Activia		37	57%	72 (68-78)	67%
DanActive and Danimals		19	100%	68 (66-70)	79%
Dannon Yogurt		25	8%	71 (70-72)	100%
Light and Fit Yogurt		68	51%	76 (72-80)	100%
Oikos Yogurt		36	47%	88 (74-88)	100%

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

⁵Includes individual websites for CFBAI listed, non-listed, and top-50 brands that averaged 1,000+ unique child visitors per month in 2016, excluding company-level websites (e.g., GeneralMills.com). Includes individual websites for less-advertised brands that averaged 5,000+ unique child visitors or had audience shares that exceeded the share of child and teen visitors to the total internet in 2016.

⁶Bold indicates higher percentage of visitors for this website than for the total internet

⁷Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

⁸As of January 2017

Dave & Buster's

Non-participating company: Top-50 child-directed brand



Traditional advertising

Total advertising spending in 2016: \$23 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	20.8	0.79
Children (6-11 y)	24.0	0.91
Young teens (12-14 y)	21.8	0.83

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
DaveAndBusters.com	7.8	10.1	4%	6%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Dave & Buster's	539	31	11	**

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Denny's Restaurant

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$61 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	20.7	0.55
Children (6-11 y)	24.4	0.65
Young teens (12-14 y)	28.9	0.76

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Denny's	641	1%	4,399	5%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
Dennys.com	7.0	8.9	5%	6%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Denny's	1,052	337	70	15,137

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

Dole Food Company

Non-participating company with healthy brands



Traditional advertising

Total advertising spending in 2016: \$10 million

TV ads viewed in 2016

	Dole Fruitocracy		Dole Fruit Bowls	
	Avg # of ads viewed	Child:adult targeted ratio	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	11.4	3.50	4.3	0.53
Children (6-11 y)	15.5	4.73	5.2	0.65
Young teens (12-14 y)	9.5	2.89	4.8	0.60

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

Brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Dole	53	1%	738	14%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
	Dole.com	0.3	0.4	1%

Source: comScore Media Metrix Key Measures report (January - December 2016)

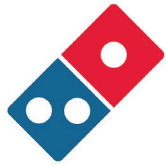
Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Dole	1,919	10	4	6,188

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

Domino's Pizza

Non-participating company: Top-50 brand



Domino's

Traditional advertising

Total advertising spending in 2016: \$277 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	73.5	0.47
Children (6-11 y)	78.9	0.50
Young teens (12-14 y)	97.2	0.62

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
Dominos.com	104.1	136.9	4%	5%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Domino's Pizza	10,380	1,127	479	60,130

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ferrara Candy Company

Joined the Children's Confection Advertising Initiative (CCAI): March 2016



Traditional advertising

This company had no advertising spending in 2016.

Digital marketing

Active social media accounts in 2016*

Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
FerraraCandyCompany	6	5	**	

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ferrero USA

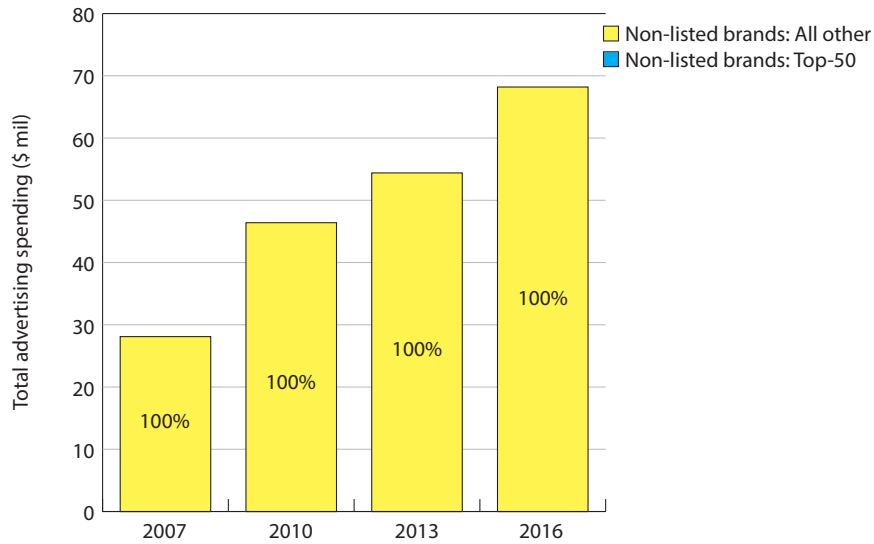
Joined the Children's Food and Beverage Advertising Initiative (CFBAI): September 2013

This company has pledged to not engage in child-directed advertising and did not have any top-50 brands in 2016.



Traditional advertising

Total advertising spending in 2016: \$68 million

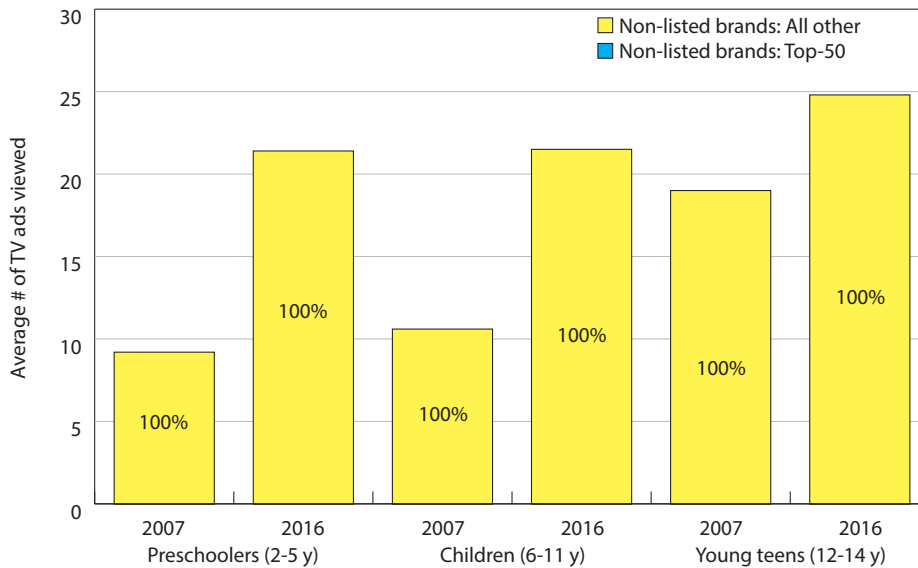


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	21.4	0.45
Children (6-11 y)	21.5	0.45
Young teens (12-14 y)	24.8	0.52

Source: Rudd Center analysis of Nielsen data (2016)



Source: Rudd Center analysis of Nielsen data (2017)

Digital marketing

Social media activity in 2016¹

Brand	Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Ferrero Rocher		1,447	2		**

**Active accounts in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

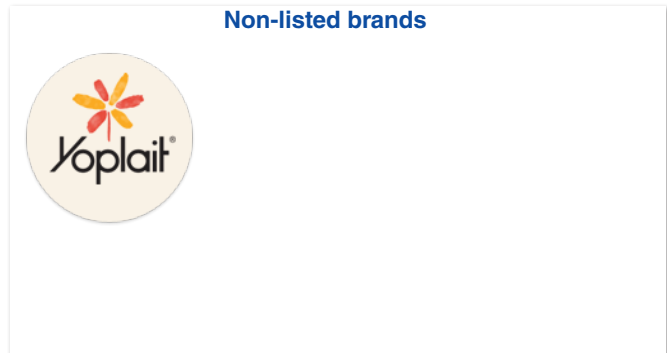
Total advertising spending	#17
Total advertising spending on CFBAI listed brands	n/a
TV advertising viewed by children ages (2-11)	#17
TV advertising viewed by young teens (12-14)	#17
Child visitors to company websites	n/a
Banner advertising on kids' websites	#14
Banner advertising on social media sites	#15
Total Facebook fans	#10
Total YouTube video views	n/a

¹Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

General Mills Inc.

Joined the Children's Food and Beverage Advertising Initiative (CFBAI): November 2006

Top-50 brands¹ in TV advertising viewed by children in 2016

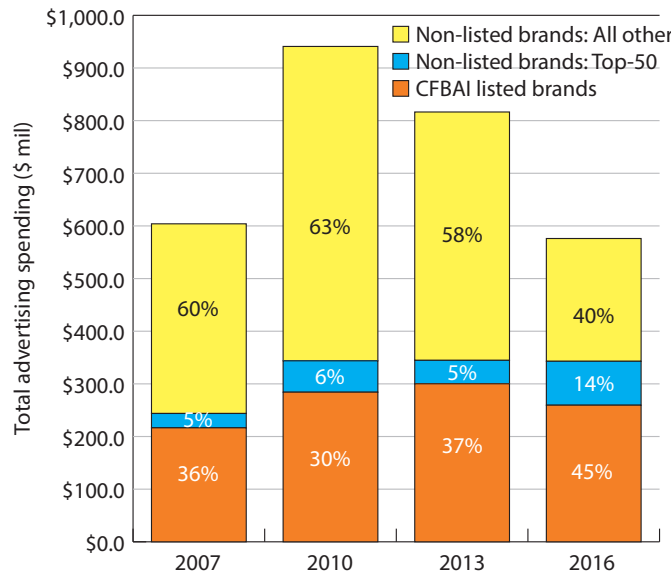


Less-advertised CFBAI listed brands³

Monsters - Boo Berry, Franken Berry, Count Dracula
 Cookie Crisp
 Golden Grahams
 Reeses's Peanut Butter Puffs
 Trix
 Yoplait Trix
 Yoplait Kid Cup

Traditional advertising

Total advertising spending in 2016: \$576 million, 45% on CFBAI listed brands

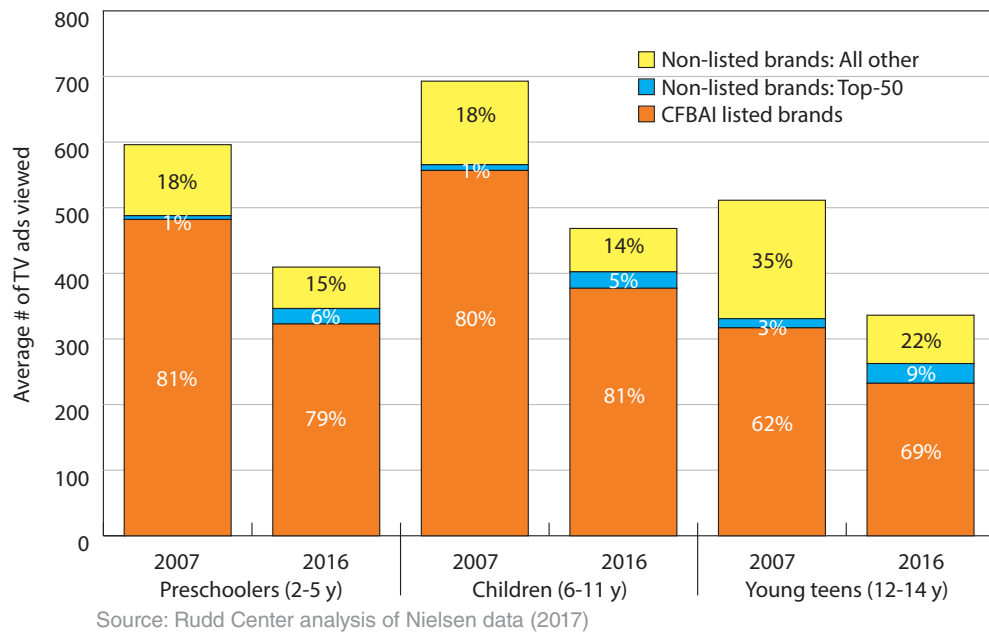


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	CFBAI listed brands			Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio	% of company total	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	322.8	1.88	79%	86.7	0.46
Children (6-11 y)	377.2	2.20	81%	91.2	0.48
Young teens (12-14 y)	232.4	1.35	69%	103.8	0.55

Source: Rudd Center analysis of Nielsen data (2016)



Digital marketing

Banner advertising on third-party websites in 2016⁴

Brand	CFBAI listed brand		Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	CFBAI listed brand	Top-50 brand	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Cinnamon Toast Crunch	✓	✓	3,335	46%	922	13%
Lucky Charms	✓	✓	2,968	5%	3,015	5%
Cheerios	✓	✓	2,623	3%	5,915	6%
Yoplait		✓	1,562	2%	3,143	4%
Go-Gurt	✓	✓	1,331	71%	492	26%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016⁵

Website	CFBAI listed brand		Avg monthly unique visitors (000)		% of total unique visitors ⁶	
	CFBAI listed brand	Top-50 brand	2-12 years	13-17 years	2-12 years	13-17 years
LuckyCharms.com	✓	✓	5.9	2.2	58%	21%
Cheerios.com	✓	✓	1.8	3.5	4%	7%
GoGurt.com	✓	✓	1.4	0.7	45%	22%
Yoplait.com		✓	0.2	1.0	1%	4%
Total General Mills sites			85.7	111.7	2%	3%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Social media activity in 2016⁷

CFBAI listed brands

Brand	Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Cheerios	✓	1,078	75	18	30,928
Cinnamon Toast Crunch	✓	1,267	17	1	26,708
Yoplait Go-Gurt	✓	1			
Lucky Charms	✓	585	17		**
Reeses's Puffs		357	**	**	

Top-50 non-listed brands and company accounts

Account name	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Betty Crocker	3,323	151	93	55,471
General Mills	16	73	7	**
General Mills Cereal	614	**	**	
Yoplait	**	72	2	2,053

**Active accounts in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#3
Total advertising spending on CFBAI listed brands	#1
TV advertising viewed by children ages (2-11)	#1
TV advertising viewed by young teens (12-14)	#1
Child visitors to company websites	#2
Banner advertising on kids' websites	#7
Banner advertising on social media sites	#8
Total Facebook fans	#5
Total YouTube video views	#3

Nutrition

CFBAI listed brands

Brand	Top-50 brand	Products		Nutrition for listed products	
		# products	% included on CFBAI list of child-directed products ⁸	NPI score Median (range)	% meeting Smart Snacks standards
Betty Crock Fruit Snacks	✓	31	71%	34 (30-42)	0%
Cheerios	✓	12	17%	58 (46-70)	100%
Cinnamon/French Toast Crunch	✓	2	100%	44 (44-44)	100%
Cocoa Puffs	✓	1	100%	48	100%
Lucky Charms	✓	2	100%	45 (42-48)	0%
Other General Mills Cereals		7	100%	46 (38-46)	100%
Yoplait Go-Gurt	✓	10	100%	64 (64-66)	100%
Yoplait Kids Cup & Trix		11	100%	66 (66-68)	82%

Top-50 non-listed brands

Brand	# products	Nutrition for listed products	
		NPI score Median (range)	% meeting Smart Snacks standards
Yoplait Yogurt	79	68 (46-72)	92%

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

⁵Includes individual websites for CFBAI listed, non-listed, and top-50 brands that averaged 1,000+ unique child visitors per month in 2016, excluding company-level websites (e.g., GeneralMills.com). Includes individual websites for less-advertised brands that averaged 5,000+ unique child visitors or had audience shares that exceeded the share of child and teen visitors to the total internet in 2016.

⁶Bold indicates higher percentage of visitors for this website than for the total internet

⁷Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

⁸As of January 2017

Ghiradelli Chocolate

Joined the Children's Confection Advertising Initiative (CCAI): March 2016



Traditional advertising

Total advertising spending in 2016: \$13.9 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	3.3	0.42
Children (6-11 y)	2.7	0.34
Young teens (12-14 y)	3.4	0.34

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Ghiradelli Chocolate Company	161	1%	890	3%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
Ghiradelli Chocolate Company	6.1	2.8	9%	4%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Ghiradelli Chocolate Company	1,568	16	31	5,925

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Golden Corral Restaurant

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$42 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	19.9	0.45
Children (6-11 y)	20.1	0.45
Young teens (12-14 y)	21.4	0.49

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
GoldenCorral.com	5.5	3.3	4%	3%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Golden Corral Restaurant	475	36	3	694

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

The Hershey Company

Joined the Children's Food and Beverage Advertising Initiative (CFBAI): November 2006

Top-50 brands¹ in TV advertising viewed by children in 2016

This company has pledged to not engage in child-directed advertising

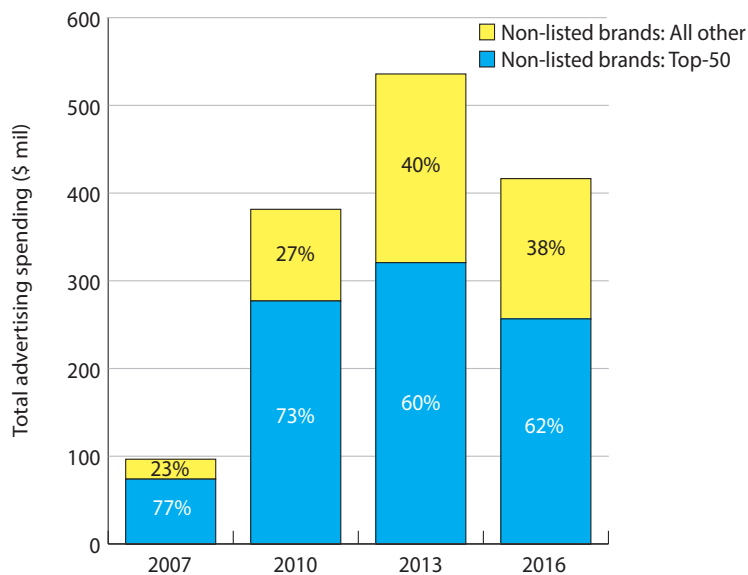
None

Non-listed brands



Traditional advertising

Total advertising spending in 2016: \$417 million

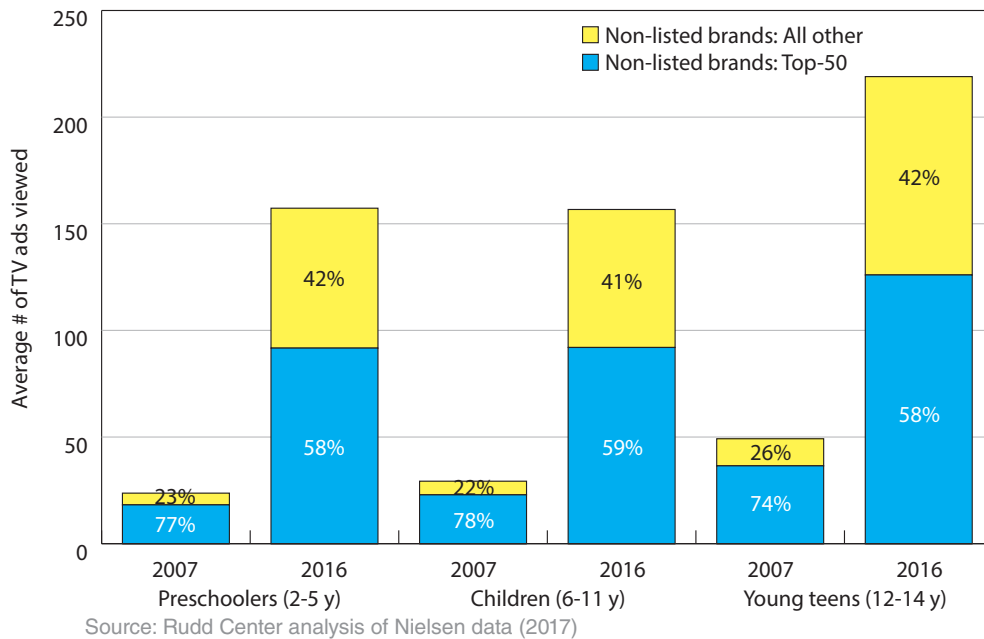


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

Non-listed brands		
	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	157.3	0.42
Children (6-11 y)	156.7	0.42
Young teens (12-14 y)	219.0	0.59

Source: Rudd Center analysis of Nielsen data (2016)



Digital marketing

Website visits in 2016⁴

Website	Top-50 brand	Avg monthly unique visitors (000)		% of total unique visitors ⁵	
		2-12 years	13-17 years	2-12 years	13-17 years
Hersheys.com	✓	3.9	13.5	2%	6%
Total Hershey Company sites		3.7	13.6	2%	6%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Social media activity in 2016⁶

Top-50 non-listed brands and company accounts:

Account name	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Kit Kat	1,066	**		14,027
Reeses's Peanut Butter Cups	11,982	224		3,773
The Hershey Company	6,915	178	64	36,976

**Active accounts in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#7
Total advertising spending on CFBAI listed brands	n/a
TV advertising viewed by children ages (2-11)	#6
TV advertising viewed by young teens (12-14)	#3
Child visitors to company websites	#14
Banner advertising on kids' websites	#13
Banner advertising on social media sites	#11
Total Facebook fans	#1
Total YouTube video views	#4

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes individual websites for CFBAI listed, non-listed, and top-50 brands that averaged 1,000+ unique child visitors per month in 2016, excluding company-level websites (e.g., GeneralMills.com). Includes individual websites for less-advertised brands that averaged 5,000+ unique child visitors or had audience shares that exceeded the share of child and teen visitors to the total internet in 2016.

⁵Bold indicates higher percentage of visitors for this website than for the total internet

⁶Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

Jelly Belly Candy Company

Joined the Children's Confection Advertising Initiative (CCAI): March 2016



Traditional advertising

Total advertising spending in 2016: \$4.2 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	1.7	0.58
Children (6-11 y)	1.6	0.56
Young teens (12-14 y)	1.6	0.56

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Jelly Belly	21	<1%	2,315	18%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
JellyBelly.com	0.8	5.1	1%	8%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Bold indicates higher percentage of visitors for this website than for the total internet.

Active social media accounts in 2016*

Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
JellyBellyUSA	675		26	697

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Just Born Quality Confections

Joined the Children's Confection Advertising Initiative (CCAI): March 2016



Traditional advertising

Total advertising spending in 2016: \$193,000

This company had no TV advertising in 2016

Digital marketing

Active social media accounts in 2016*

Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Justborninc	3	**		

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Kellogg Company

Joined the Children's Food and Beverage Advertising Initiative (CFBAI): November 2006

Top-50 brands¹ in TV advertising viewed by children in 2016

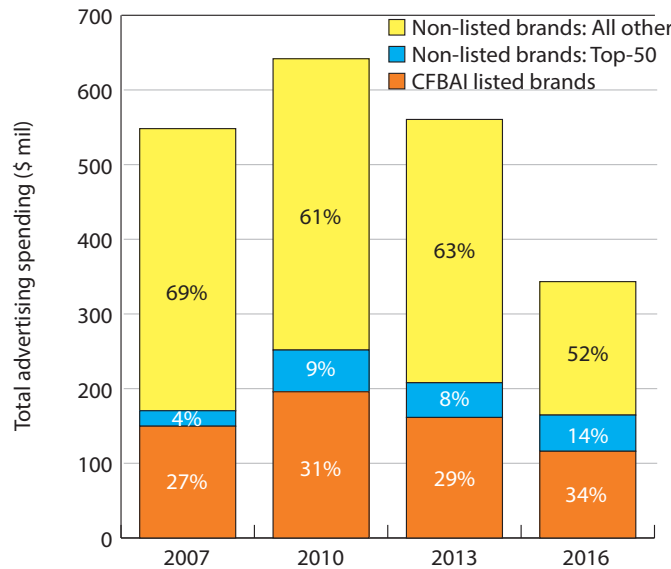
CFBAI listed brands ² that may be in child-directed advertising	Non-listed brands
 	

Less-advertised CFBAI listed brands³

Apple/Cinnamon Jacks
 Corn Pops
 Frosted Mini-Wheats
 Rice Krispies
 Scooby Doo
 Eggo Waffles and Bites

Traditional advertising

Total advertising spending in 2016: \$343 million, 34% on CFBAI listed brands

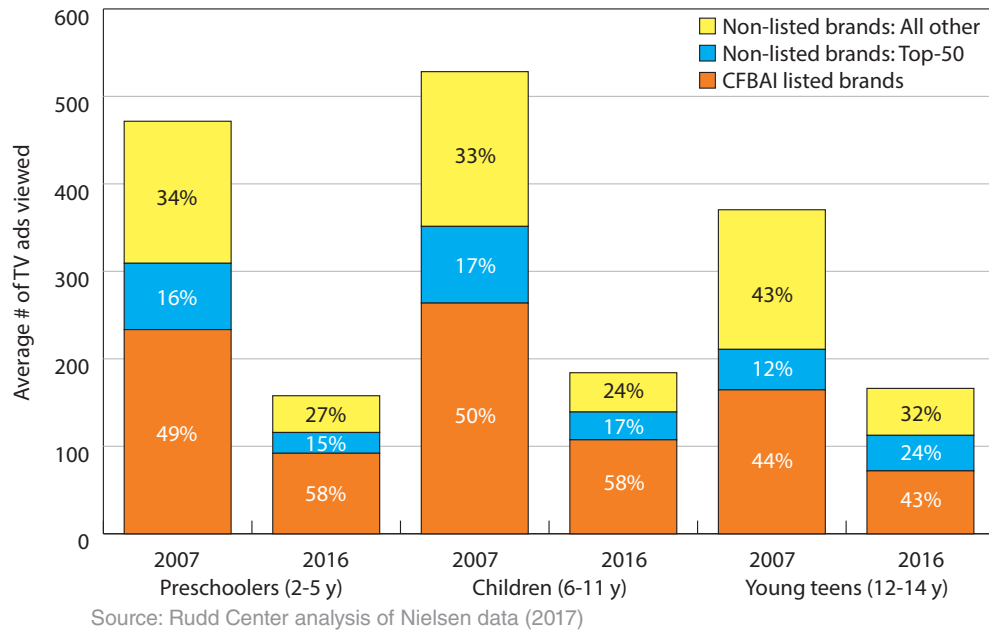


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	CFBAI listed brands			Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio	% of company total	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	92.0	1.34	58%	65.8	0.47
Children (6-11 y)	107.4	1.56	58%	76.6	0.55
Young teens (12-14 y)	71.9	1.05	43%	94.3	0.68

Source: Rudd Center analysis of Nielsen data (2016)



Digital marketing

Banner advertising on third-party websites in 2016⁴

Brand	CFBAI listed brand	Top-50 brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
			# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Froot Loops	✓	✓	37,659	39%	1,795	2%
Frosted Flakes	✓	✓	4,068	6%	657	1%
Eggo	✓		606	0%	3,596	3%
Mini-Wheats	✓		145	0%	1,834	1%
Special K			6,119	1%	16,024	3%
Pringles			3,515	1%	4,488	2%
Cheez-It			3,426	1%	12,753	4%
Kellogg's Raisin Bran			2,558	2%	2,187	2%
Krave			1,343	85%	0	0%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016⁵

Website	CFBAI listed brand	Top-50 brand	Avg monthly unique visitors (000)		% of total unique visitors ⁵	
			2-12 years	13-17 years	2-12 years	13-17 years
PopTarts.com		✓	1.4	2.3	6%	10%
FrootLoops.com	✓	✓	9.2	5.3	22%	13%
LeggoMyEggo.com	✓		3.2	0.9	12%	4%
Total Kellogg Company sites			32.7	35.8	4%	5%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Social media activity in 2016⁷

CFBAI listed brands

Brand	Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Eggo Waffles and Bites		2,006	**		
Frosted Mini-Wheats		1,000	**		
Rice Krispies		861	12		**
Frosted Flakes	✓	1,027			**

Top-50 non-listed brands and company accounts

Account name	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Kelloggs US	546	**	**	**
Pop Tarts	4,494	44	**	7,174

**Active accounts in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#8
Total advertising spending on CFBAI listed brands	#3
TV advertising viewed by children ages (2-11)	#5
TV advertising viewed by young teens (12-14)	#5
Child visitors to company websites	#9
Banner advertising on kids' websites	#2
Banner advertising on social media sites	#9
Total Facebook fans	#4
Total YouTube video views	#8

Nutrition

CFBAI listed brands

Brand	Top-50 brand	Products		Nutrition for listed products	
		# products	% included on CFBAI list of child-directed products ⁸	NPI score Median (range)	% meeting Smart Snacks standards
Froot Loops	✓	3	67%	46 (46-46)	50%
Frosted Flakes	✓	4	50%	40 (38-42)	100%
Eggo Waffles and Bites		29	7%	51 (46-56)	100%
Frosted Mini-Wheats		8	13%	74 (74-74)	100%
Other Kellogg		6	50%	46 (46-46)	67%

Top-50 non-listed brands

Brand	# products	Nutrition for listed products	
		NPI score Median (range)	% meeting Smart Snacks standards
Pop Tarts	27	38 (32-42)	0%

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

⁵Includes individual websites for CFBAI listed, non-listed, and top-50 brands that averaged 1,000+ unique child visitors per month in 2016, excluding company-level websites (e.g., GeneralMills.com). Includes individual websites for less-advertised brands that averaged 5,000+ unique child visitors or had audience shares that exceeded the share of child and teen visitors to the total internet in 2016.

⁶Bold indicates higher percentage of visitors for this website than for the total internet

⁷Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

⁸As of January 2017

KFC

Non-participating company: Top-50 brand

**Traditional advertising**

Total advertising spending in 2016: \$204 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	36.7	0.41
Children (6-11 y)	38.0	0.42
Young teens (12-14 y)	52.0	0.57

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
KFC	248	<1%	24,105	11%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
KFC.com	13.2	20.2	4%	6%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
KFC	39,628	1,110	350	46,435


*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

Source: Rudd Center analysis of Unmetric data (January - December 2016)


The Kraft Heinz Company

Joined the Children's Food and Beverage Advertising Initiative (CFBAI): November 2006

Top-50 brands¹ in TV advertising viewed by children in 2016

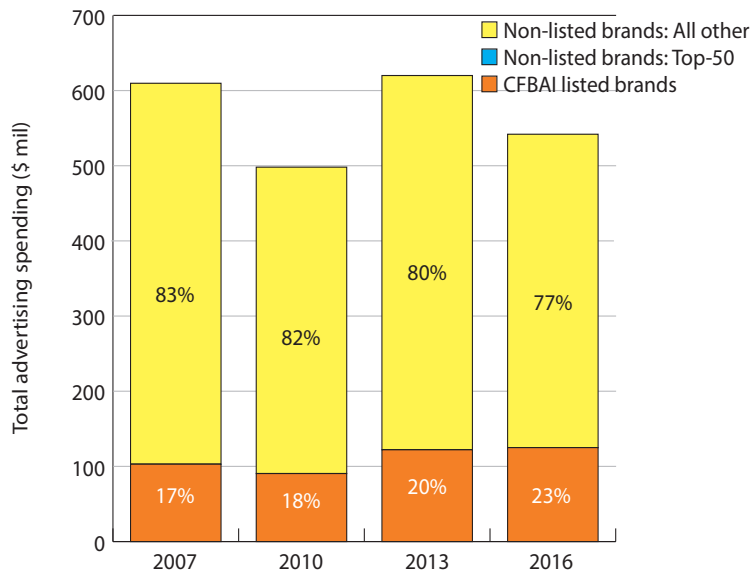
CFBAI listed brands ² that may be in child-directed advertising	Non-listed brands
	None

Less-advertised CFBAI listed brands³



Traditional advertising

Total advertising spending in 2016: \$542 million, 23% on CFBAI listed brands

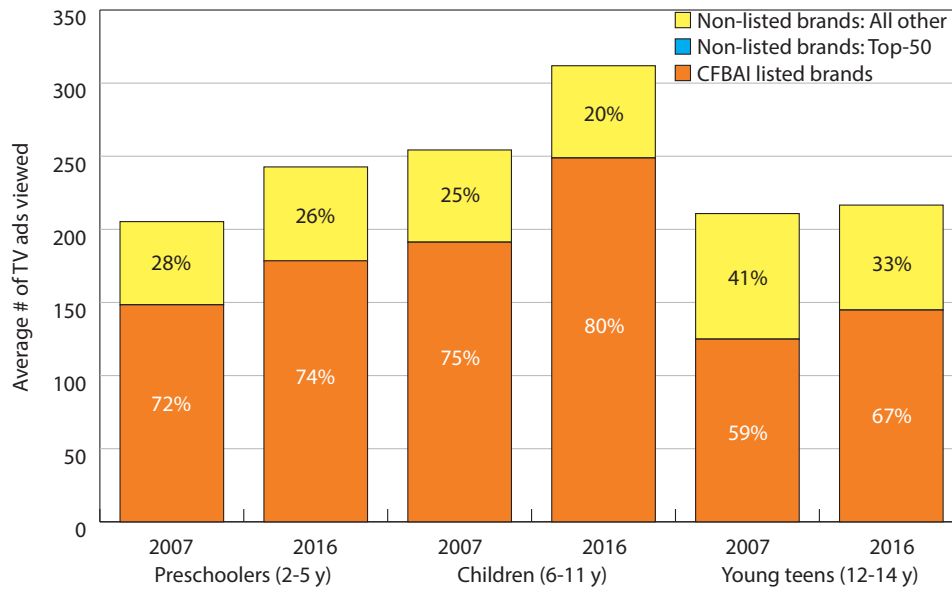


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	CFBAI listed brands			Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio	% of company total	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	178.5	2.81	74%	64.2	0.44
Children (6-11 y)	248.8	3.92	80%	62.8	0.43
Young teens (12-14 y)	144.8	2.28	67%	71.8	0.50

Source: Rudd Center analysis of Nielsen data (2016)



Source: Rudd Center analysis of Nielsen data (2017)

Digital marketing

Banner advertising on third-party websites in 2016⁴

Brand	CFBAI listed brand	Top-50 brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
			# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Lunchables (excluding Uploaded varieties)	✓	✓	165,871	24%	89,246	11%
Capri Sun (including Roarin' Waters)	✓	✓	67,770	16%	10,962	3%
Kool-Aid	✓	✓	18,142	50%	597	2%
Lunchables Uploaded			7,881	7%	21,745	20%
Kraft Macaroni & Cheese	✓	✓	2,031	1%	5,349	2%
Kraft Singles	✓		378	0%	16,548	2%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016⁵

Website	CFBAI listed brand	Top-50 brand	Avg monthly unique visitors (000)		% of total unique visitors ⁶	
			2-12 years	13-17 years	2-12 years	13-17 years
Lunchables.com	✓	✓	44.1	9.6	78%	17%
Planters.com			1.6	5.4	3%	10%
Total Kraft Heinz Company sites			54.1	20.1	15%	5%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Social media activity in 2016⁷

CFBAI listed brands

Brand	Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Capri Sun	✓	1,196	4		4,212
Kool-Aid	✓	2,966			454
Kraft Macaroni & Cheese	✓	1,481	22	2	
Lunchables	✓	918	6		
Kraft Singles		25	2		

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#4
Total advertising spending on CFBAI listed brands	#2
TV advertising viewed by children ages (2-11)	#2
TV advertising viewed by young teens (12-14)	#4
Child visitors to company websites	#3
Banner advertising on kids' websites	#1
Banner advertising on social media sites	#2
Total Facebook fans	#8
Total YouTube video views	#10

Nutrition

CFBAI listed brands

Brand	Top-50 brand	Products		Nutrition for listed products	
		# products	% included on CFBAI list of child-directed products ³	NPI score Median (range)	% meeting Smart Snacks standards
Capri Sun, 100% juice and juice blends	✓	11	100%	70 (68-76)	-
Capri Sun, Roarin' Waters	✓	9	67%	68 (68-68)	-
Capri Sun, other beverages	✓	14	0%	68 (66-68)	-
Kool-Aid, low calorie beverages	✓	72	46%	70 (68-70)	-
Kool-Aid, other beverages	✓	18	0%	68 (68-68)	-
Kraft Macaroni & Cheese (Blue Box)	✓	16	100%	68 (66-70)	6%
Kraft Macaroni & Cheese (Deluxe and Microwavable)	✓	14	50%	64 (64-66)	71%
Lunchables	✓	36	11%	67 (64-68)	0%
Kraft/Polly-O		16	38%	34 (30-34)	0%
Kraft Singles		12	83%	22(20-28)	0%

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

⁵Includes individual websites for CFBAI listed, non-listed, and top-50 brands that averaged 1,000+ unique child visitors per month in 2016, excluding company-level websites (e.g., GeneralMills.com). Includes individual websites for less-advertised brands that averaged 5,000+ unique child visitors or had audience shares that exceeded the share of child and teen visitors to the total internet in 2016.

⁶Bold indicates higher percentage of visitors for this website than for the total internet

⁷Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

⁸As of January 2017

Little Caesar's

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$162 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	54.2	0.43
Children (6-11 y)	58.4	0.46
Young teens (12-14 y)	72.6	0.58

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Little Caesars	2,757	172	**	2,276

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Mars

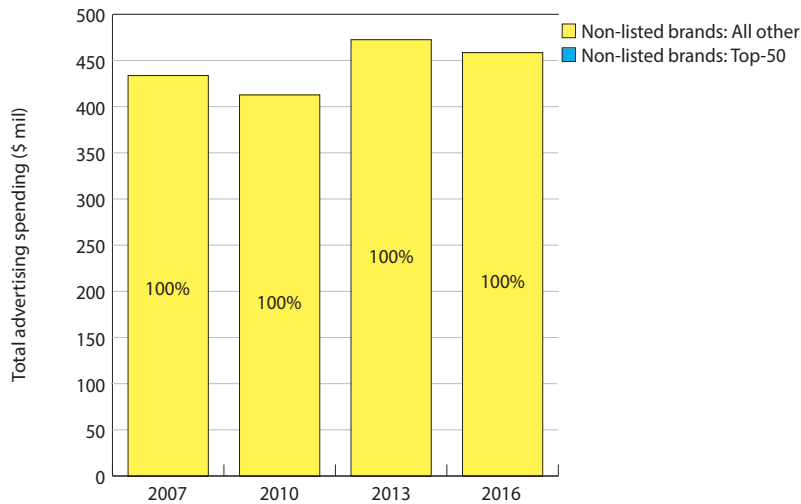
Joined the Children's Food and Beverage Advertising Initiative (CFBAI): January 2007

This company has pledged to not engage in child-directed advertising and did not have any top-50 brands in 2016.

MARS

Traditional advertising

Total advertising spending in 2016: \$459 million

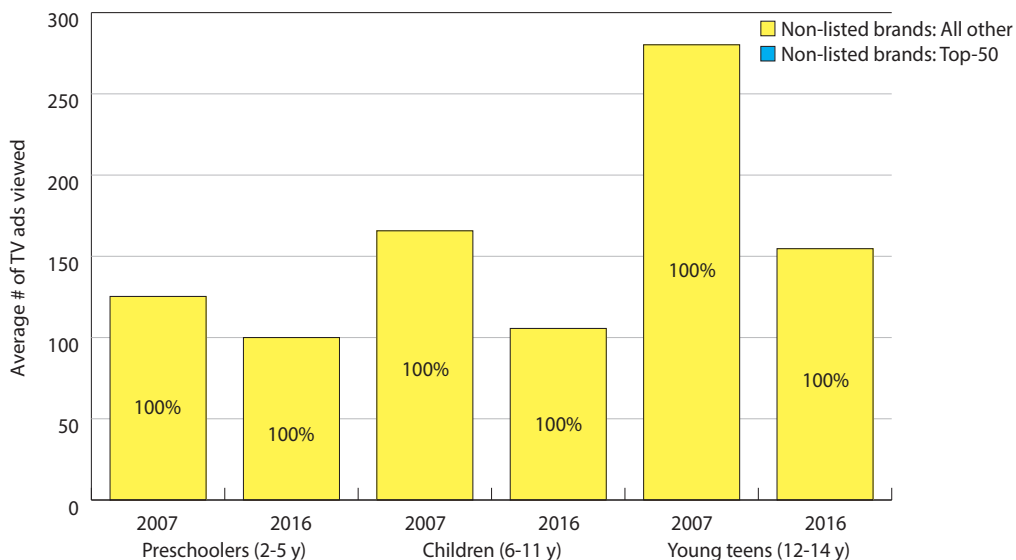


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

Non-listed brands		
	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	100.0	0.39
Children (6-11 y)	105.6	0.41
Young teens (12-14 y)	154.6	0.61

Source: Rudd Center analysis of Nielsen data (2016)



Source: Rudd Center analysis of Nielsen data (2017)

Digital marketing

Banner advertising on third-party websites in 2016⁴

Brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Wrigley	2,567	0%	36,530	5%
Snickers	2,241	2%	7,075	5%
CocoaVia	1,905	2%	10,233	11%
Starburst	1,270	1%	9,548	8%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016⁵

Website	Avg monthly unique visitors (000)		% of total unique visitors ⁶	
	2-12 years	13-17 years	2-12 years	13-17 years
MyMMS.com	3.5	3.0	4%	3%
5Gum.com	3.0	2.6	21%	18%
MMS.com	2.9	4.3	4%	6%
Skittles.com	1.0	1.3	9%	12%
Total Mars sites	34.2	38.6	5%	6%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#6
Total advertising spending on CFBAI listed brands	n/a
TV advertising viewed by children ages (2-11)	#7
TV advertising viewed by young teens (12-14)	#6
Child visitors to company websites	#8
Banner advertising on kids' websites	#10
Banner advertising on social media sites	#4
Total Facebook fans	n/a
Total YouTube video views	n/a

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

⁵Includes individual websites for CFBAI listed, non-listed, and top-50 brands that averaged 1,000+ unique child visitors per month in 2016, excluding company-level websites (e.g., GeneralMills.com). Includes individual websites for less-advertised brands that averaged 5,000+ unique child visitors or had audience shares that exceeded the share of child and teen visitors to the total internet in 2016.

⁶Bold indicates higher percentage of visitors for this website than for the total internet.

McDonald's

Joined the Children's Food and Beverage Advertising Initiative (CFBAI): November 2006

Top-50 brands¹ in TV advertising viewed by children in 2016

CFBAI listed brands² that may be in child-directed advertising



Non-listed brands

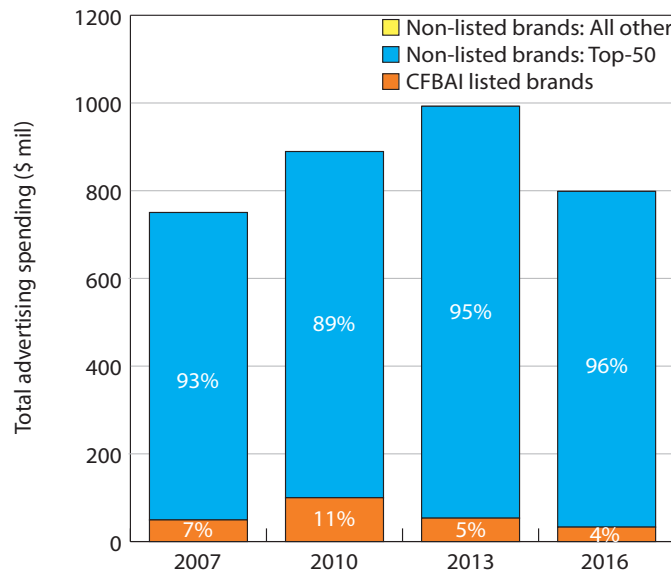
All other products (not Happy Meals)

Less-advertised CFBAI listed brands³

None

Traditional advertising

Total advertising spending in 2016: \$799 million, 4% on CFBAI listed brands

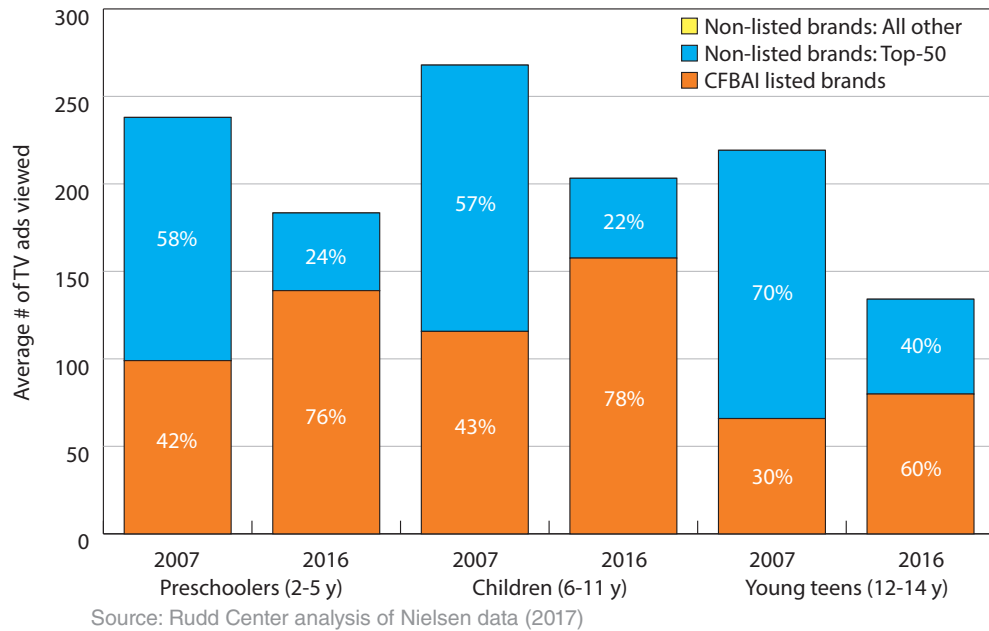


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	CFBAI listed brands			Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio	% of company total	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	139.0	4.41	76%	44.4	0.44
Children (6-11 y)	157.6	5.00	78%	45.6	0.45
Young teens (12-14 y)	79.9	2.53	60%	54.2	0.53

Source: Rudd Center analysis of Nielsen data (2016)



Digital marketing

Banner advertising on third-party websites in 2016⁴

Brand	CFBAI listed brand	Top-50 brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
			# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Happy Meal	✓	✓	5,526	40%	534	4%
McDonald's products (excluding Happy Meal)		✓	10,841	1%	63,236	12%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016⁵

Website	CFBAI listed brand	Top-50 brand	Avg monthly unique visitors (000)		% of total unique visitors ⁶	
			2-12 years	13-17 years	2-12 years	13-17 years
McDonalds.com	✓	✓	85.8	125.5	6%	9%
HappyMeal.com	✓	✓	62.3	20.8	43%	15%
Total McDonald's sites			167.9	182.5	7%	8%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Social media activity in 2016⁷

Top-50 non-listed brands and company accounts

Account name	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
McDonald's	10,534	3,331	970	16,904

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#1
Total advertising spending on CFBAI listed brands	#6
TV advertising viewed by children ages (2-11)	#3
TV advertising viewed by young teens (12-14)	#8
Child visitors to company websites	#1
Banner advertising on kids' websites	#6
Banner advertising on social media sites	#7
Total Facebook fans	#3
Total YouTube video views	#7

Nutrition

CFBAI listed Happy Meals

Main dish	Side	Drink	Total calories (kcal)	Saturated fat (g)	Total sugar (g)	Sodium (mg)	Exceeds Smart Snack limits	Nutrients of concern
Chicken McNuggets	Apples, fries	1% low fat milk	475	5	20	660	✓	Calories, sodium
Chicken McNuggets	Apples, fries	Fat free chocolate milk	505	3.5	30	670	✓	Calories, sodium
Chicken McNuggets	Apples, fries	100% fruit juice	455	3.5	27	550	✓	Calories, sodium
Chicken McNuggets	Apples, yogurt	100% fruit juice	395	2.5	33	520	✓	Calories, sodium
Chicken McNuggets	Mandarin oranges, fries	1% low fat milk	495	5	23	660	✓	Calories, sodium
Chicken McNuggets	Mandarin oranges, fries	Fat free chocolate milk	525	3.5	33	670	✓	Calories, sodium
Chicken McNuggets	Mandarin oranges, fries	100% fruit juice	475	3.5	30	550	✓	Calories, sodium
Hamburger	Apples, fries	Fat free chocolate milk	505	4	31	690	✓	Calories, sodium
Hamburger	Apples, fries	100% fruit juice	455	4	28	570	✓	Calories, sodium
Hamburger	Yogurt, fries	100% fruit juice	490	4	31	605	✓	Calories, sodium
Hamburger	Mandarin oranges, fries	Fat free chocolate milk	525	4	34	690	✓	Calories, sodium
Hamburger	Mandarin oranges, fries	100% fruit juice	475	4	31	570	✓	Calories, sodium

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

⁵Includes individual websites for CFBAI listed, non-listed, and top-50 brands that averaged 1,000+ unique child visitors per month in 2016, excluding company-level websites (e.g., GeneralMills.com). Includes individual websites for less-advertised brands that averaged 5,000+ unique child visitors or had audience shares that exceeded the share of child and teen visitors to the total internet in 2016.

⁶Bold indicates higher percentage of visitors for this website than for the total internet

⁷Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

MilkPEP

Non-participating company with a healthy brand

**Traditional advertising**

Total advertising spending in 2016: \$58 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	15.9	0.79
Children (6-11 y)	13.8	0.69
Young teens (12-14 y)	12.3	0.61

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

Brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
MilkPEP	401	1%	1,682	6%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
MilkPEP	475	22	1	5,907

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
 Source: Rudd Center analysis of Unmetric data (January - December 2016)

Mondelez Global

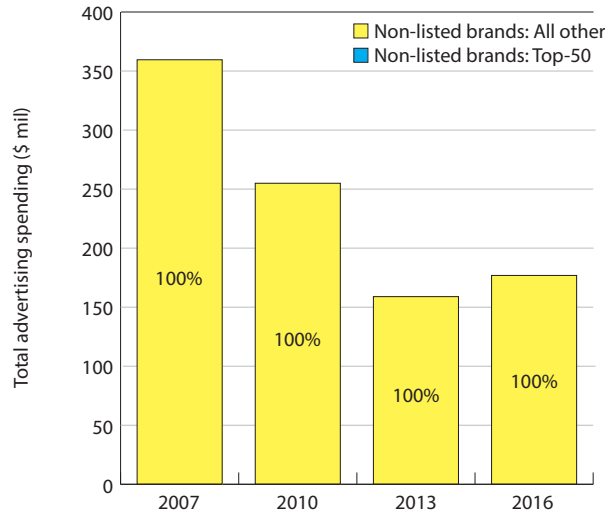
Joined the Children's Food and Beverage Advertising Initiative (CFBAI): February 2013

This company has pledged to not engage in child-directed advertising and did not have any top-50 brands in 2016.



Traditional advertising

Total advertising spending in 2016: \$177 million

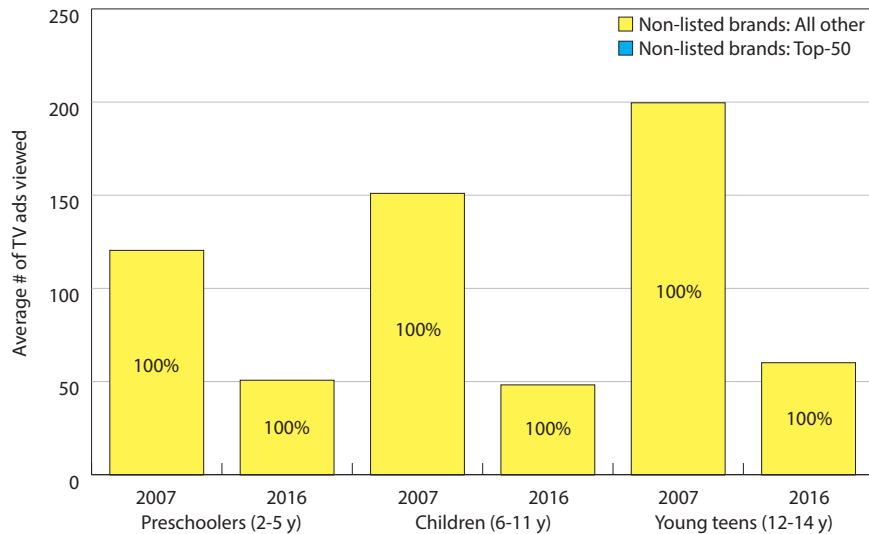


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	50.7	0.42
Children (6-11 y)	48.2	0.40
Young teens (12-14 y)	60.1	0.50

Source: Rudd Center analysis of Nielsen data (2017)



Source: Rudd Center analysis of Nielsen data (2017)

Digital marketing

Social media activity in 2016¹

Brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Mondelez Global	127	14		20,220

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#12
Total advertising spending on CFBAI listed brands	n/a
TV advertising viewed by children ages (2-11)	#15
TV advertising viewed by young teens (12-14)	#11
Child visitors to company websites	#15
Banner advertising on kids' websites	#15
Banner advertising on social media sites	#12
Total Facebook fans	#16
Total YouTube video views	#6

¹Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

Nestle USA

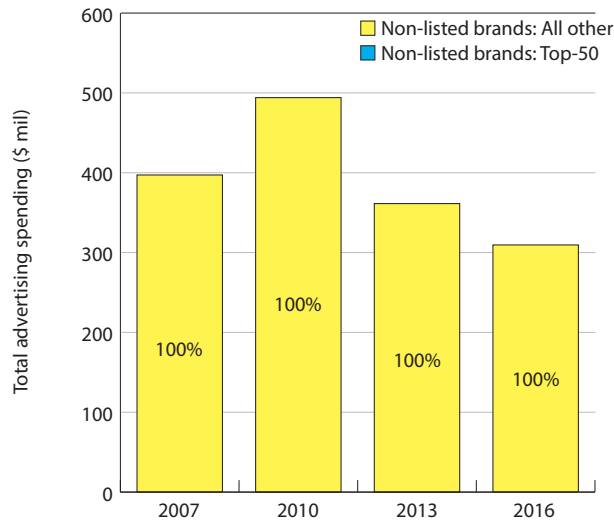
Joined the Children's Food and Beverage Advertising Initiative (CFBAI): July 2008

This company has pledged to not engage in child-directed advertising and did not have any top-50 brands in 2016.



Traditional advertising

Total advertising spending in 2016: \$310 million

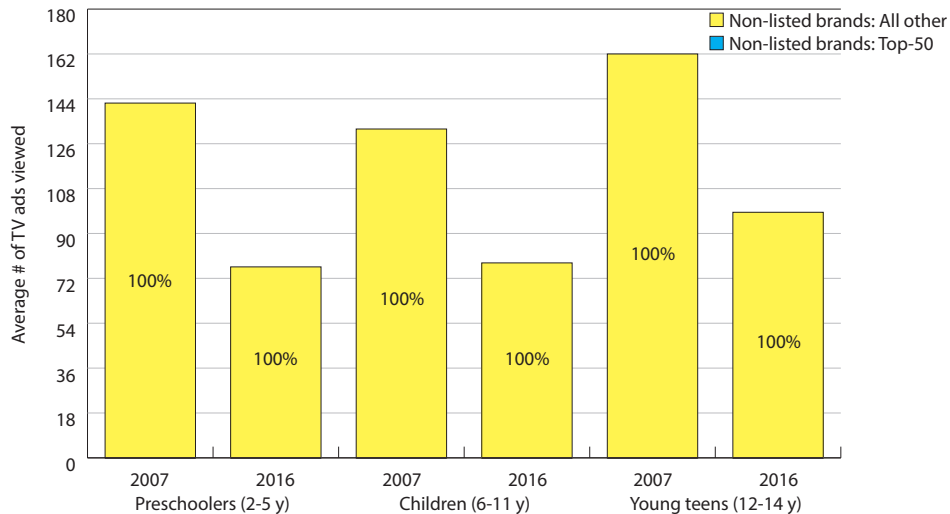


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	76.6	0.42
Children (6-11 y)	78.2	0.43
Young teens (12-14 y)	98.5	0.54

Source: Rudd Center analysis of Nielsen data (2016)



Source: Rudd Center analysis of Nielsen data (2017)

Digital marketing

Banner advertising on third-party websites in 2016¹

Brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Nestlé Waters	25,968	4%	71,104	11%
Nestea	2,284	9%	1,179	7%
Nespresso	1,640	0%	134,634	35%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Social media activity in 2016²

Brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Nestle USA	132	177		349

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#10
Total advertising spending on CFBAI listed brands	n/a
TV advertising viewed by children ages (2-11)	#9
TV advertising viewed by young teens (12-14)	#9
Child visitors to company websites	#5
Banner advertising on kids' websites	#3
Banner advertising on social media sites	#3
Total Facebook fans	#15
Total YouTube video views	#13

¹Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

²Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

Olive Garden

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$131 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	40.2	0.45
Children (6-11 y)	40.2	0.45
Young teens (12-14 y)	46.2	0.52

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Olive Garden	5,047	2%	21,136	8%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
OliveGarden.com	24.8	29.1	3%	4%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Olive Garden	6,469	354	192	4,718

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

Outback Steakhouse

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$70 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	21.6	0.45
Children (6-11 y)	23.0	0.47
Young teens (12-14 y)	25.9	0.53

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Outback Steakhouse	98	<1%	7,168	13%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
Outback.com	10.3	7.8	2%	2%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Outback Steakhouse	3,109	282	32	10,360

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

Papa John's

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$165 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	29.4	0.48
Children (6-11 y)	26.5	0.44
Young teens (12-14 y)	33.0	0.54

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Papa John's	8,762	2%	156,215	31%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
PapaJohns.com	76.7	85.5	4%	4%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Papa John's	2,402	458	113	1,705

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

Source: Rudd Center analysis of Unmetric data (January - December 2016)

PepsiCo


Joined the Children's Food and Beverage Advertising Initiative (CFBAI): November 2006

Top-50 brands¹ in TV advertising viewed by children in 2016



CFBAI listed brands² that may be in child-directed advertising

None

Non-listed brands

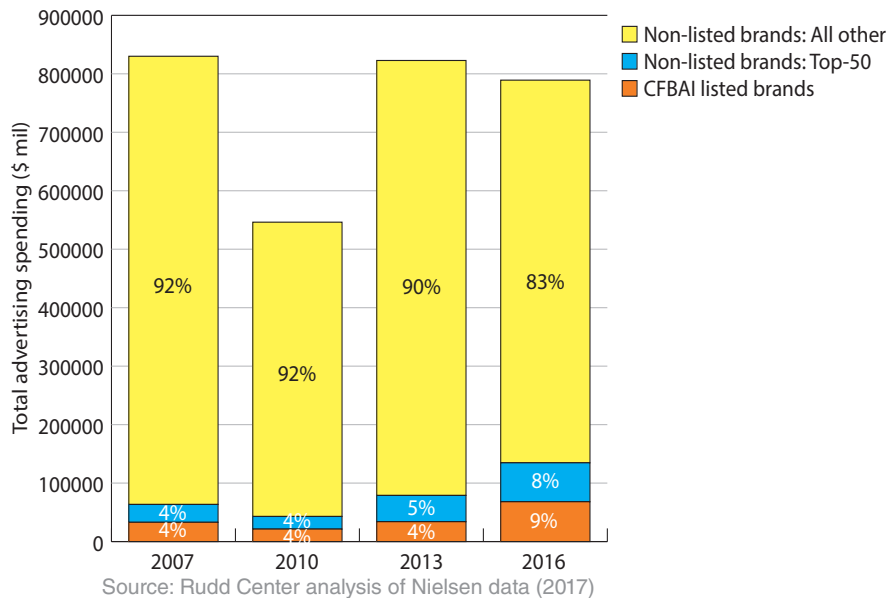


Less-advertised CFBAI listed brands³

Traditional advertising

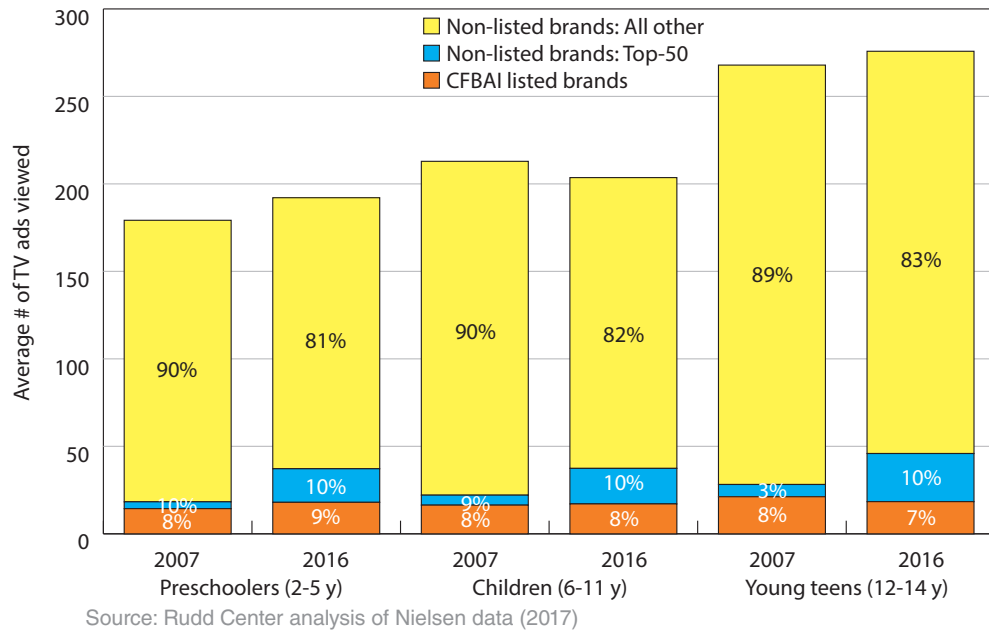
Total advertising spending in 2016: \$790 million, 9% on CFBAI listed brands



TV ads viewed in 2016

	CFBAI listed brands			Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio	% of company total	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	18.0	0.42	9%	174.1	0.42
Children (6-11 y)	17.1	0.40	8%	186.6	0.45
Young teens (12-14 y)	18.4	0.43	7%	257.4	0.62

Source: Rudd Center analysis of Nielsen data (2016)



Digital marketing

Banner advertising on third-party websites in 2016⁴

Brand	CFBAI listed brand	Top-50 brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
			# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Quaker	✓		2,031	0%	33,823	7%
Frito-Lay (excluding Lays)			4,893	0%	1,093,342	51%
Gatorade			3,198	1%	9,595	4%
Lays		✓	2,226	0%	312,209	52%
Mountain Dew			2,213	2%	8,581	7%
Naked Juice			1,257	1%	8,310	3%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016⁵

Website	CFBAI listed brand	Top-50 brand	Avg monthly unique visitors (000)		% of total unique visitors ⁶	
			2-12 years	13-17 years	2-12 years	13-17 years
Pepsi.com			8.3	7.4	7%	7%
Fritolay.com			6.1	6.4	5%	5%
MountainDew.com			4.6	9.3	5%	11%
PepsiCo.com			4.1	3.9	3%	3%
Doritos.com			3.1	2.2	9%	6%
MyPepsiCo.com			2.4	1.1	3%	1%
QuakerOats.com	✓		1.2	2.9	1%	3%
Total PepsiCo sites			46.9	44.9	5%	5%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Social media activity in 2016⁷

CFBAI listed brands

Brand	Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Quaker		1,362	187	**	52,152

Top-50 non-listed brands and company accounts

Account name	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Lays	6,855	426	328	85,243

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#2
Total advertising spending on CFBAI listed brands	#5
TV advertising viewed by children ages (2-11)	#4
TV advertising viewed by young teens (12-14)	#2
Child visitors to company websites	#4
Banner advertising on kids' websites	#5
Banner advertising on social media sites	#1
Total Facebook fans	#6
Total YouTube video views	#2

Nutrition

CFBAI listed brands

Brand	Top-50 brand	Products		Nutrition for listed products	
		# products	% included on CFBAI list of child-directed products ⁸	NPI score Median (range)	% meeting Smart Snacks standards
Quaker Life	✓	4	25%	54 (54-54)	100%
Quaker Oatmeal and Oats	✓	31	10%	80 (78-80)	100%

Top-50 non-listed brands

Brand	# products	Nutrition for all products	
		NPI score Median (range)	% meeting Smart Snacks standards
Lays Potato Chips	8	40 (20-58)	0%

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

⁵Includes individual websites for CFBAI listed, non-listed, and top-50 brands that averaged 1,000+ unique child visitors per month in 2016, excluding company-level websites (e.g., GeneralMills.com). Includes individual websites for less-advertised brands that averaged 5,000+ unique child visitors or had audience shares that exceeded the share of child and teen visitors to the total internet in 2016.

⁶Bold indicates higher percentage of visitors for this website than for the total internet

⁷Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

⁸As of January 2017

Perfetti Van Melle

Non-participating company with a top-50 child-directed brand

Child-directed brands



Traditional advertising

Total advertising spending in 2016: \$22 million

Airheads: \$7 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	17.4	1.67
Children (6-11 y)	22.7	2.17
Young teens (12-14 y)	17.7	1.69

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Airheads	31	<1%	435	4%

Source: comScore Advertiser report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Airheads	1,134	1,937	**	1,747

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Pizza Hut

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$203 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	53.2	0.46
Children (6-11 y)	57.9	0.51
Young teens (12-14 y)	75.8	0.66

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Pizza Hut	11,290	1%	78,060	9%
Pizza Hut	186	1%	1,132	5%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
PizzaHut.com	137.8	134.3	5%	5%
PizzaHutOffers.com	1.2	0.3	7%	2%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Pizza Hut	5,778	1,493	453	22,438

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Popeye's

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$139 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	29.9	0.48
Children (6-11 y)	34.0	0.55
Young teens (12-14 y)	41.3	0.66

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
Popeyes.com	10.8	5.4	5%	3%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Popeye's	542	79	44	97

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

Source: Rudd Center analysis of Unmetric data (January - December 2016)


Post Foods

Joined the Children's Food and Beverage Advertising Initiative (CFBAI): October 2009

Top-50 brands¹ in TV advertising viewed by children in 2016

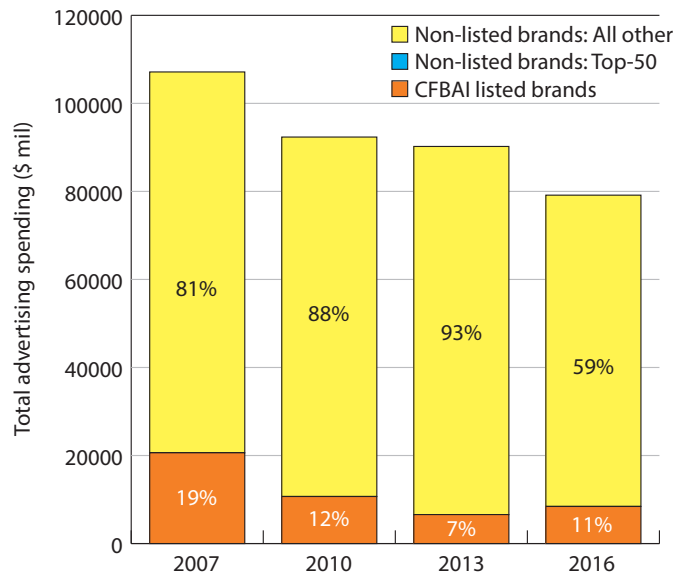
CFBAI listed brands ² that may be in child-directed advertising	Non-listed brands
	None

Less-advertised CFBAI listed brands³



Traditional advertising

Total advertising spending in 2016: \$78 million, 11% on CFBAI listed brands

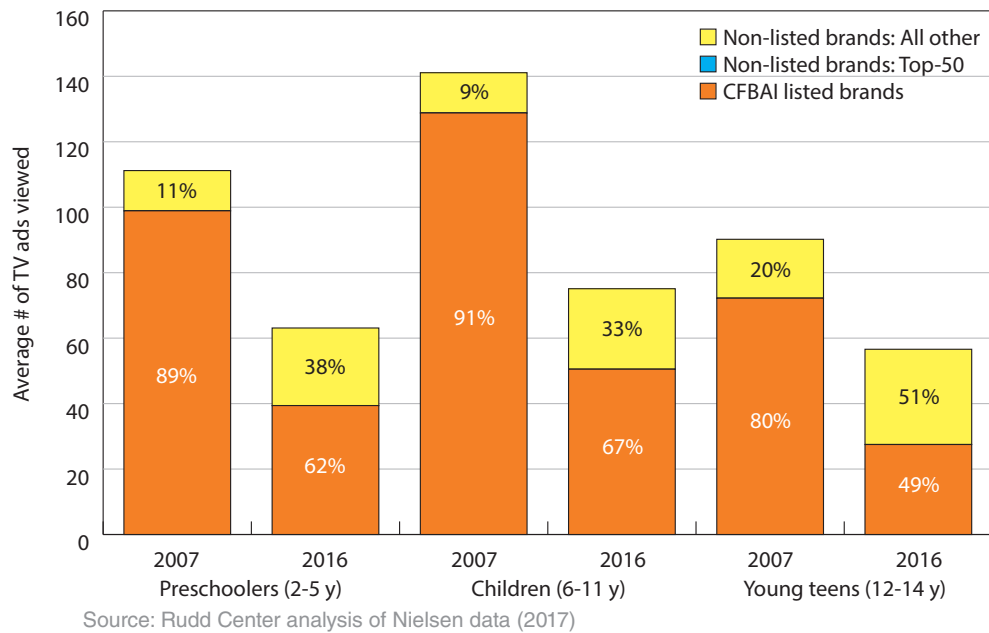


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	CFBAI listed brands			Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio	% of company total	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	39.4	4.36	62%	23.7	0.43
Children (6-11 y)	50.5	5.60	67%	24.6	0.45
Young teens (12-14 y)	27.5	3.04	49%	29.1	0.53

Source: Rudd Center analysis of Nielsen data (2016)



Digital marketing

Banner advertising on third-party websites in 2016⁴

Brand	CFBAI listed brand	Top-50 brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
			# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Post Cereals**	✓	✓	13,287	26%	3,112	6%

Source: comScore Ad Matrix Advertiser report (January - December 2016)

**comScore did not specify a brand, but these ads likely promoted the company's CFBAI listed brands.

Social media activity in 2016⁵

CFBAI listed brands

Brand	Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Fruity/Cocoa Pebbles	✓	157	4	**	
Honey-Comb		61			

**Active accounts in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#15
Total advertising spending on CFBAI listed brands	#8
TV advertising viewed by children ages (2-11)	#10
TV advertising viewed by young teens (12-14)	#12
Child visitors to company websites	n/a
Banner advertising on kids' websites	#9
Banner advertising on social media sites	#14
Total Facebook fans	#14
Total YouTube video views	n/a

Nutrition

CFBAI listed brands

Brand	Top-50 brand	Products		Nutrition for listed products	
		# products	% included on CFBAI list of child-directed products ⁵	NPI score Median (range)	% meeting Smart Snacks standards
Pebbles	✓	4	75%	30 (28-36)	100%
Fruity Pebbles Treats		1	100%	24	0%
Other Post Cereals		2	100%	48 (44-52)	100%

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

⁵Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

⁶As of January 2017

The Promotion in Motion Companies

Joined the Children's Confection Advertising Initiative (CCAI): March 2016



Traditional advertising

Total advertising spending in 2016: \$70,000

This company had no TV advertising in 2016

Digital marketing

Active social media accounts in 2016*

Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
WelchsFruitSnacks	1,112	87	**	1,727
SourJacks	649	**	**	

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Red Lobster

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$79 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	22.3	0.40
Children (6-11 y)	21.2	0.38
Young teens (12-14 y)	24.1	0.44

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Red Lobster	176	<1%	284	1%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
RedLobster.com	17.3	9.0	4%	2%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Red Lobster	3,955	268	103	1,398

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

R.M. Palmer Company

Joined the Children's Confection Advertising Initiative (CCAI): March 2016



Traditional advertising

This company had no advertising spending in 2016.

Digital marketing

Active social media accounts in 2016*

Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
R.M. Palmer Company	92		**	

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Sonic

Non-participating company: Top-50 brand



Sonic kids' meals had child-directed advertising in 2016.

Traditional advertising

Total advertising spending in 2016

Kids' meals: \$146,000

Other products: \$242 million

TV ads viewed in 2016

	Kids' meals		Other products	
	Avg # of ads viewed	Child:adult targeted ratio	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	0.8	5.83	59.6	0.47
Children (6-11 y)	0.8	5.59	65.5	0.51
Young teens (12-14 y)	0.3	2.33	82.9	0.64

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Sonic	3,408	314	165	5,151

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

Subway

Non-participating company: Top-50 brand



Subway kids' meals had child-directed advertising in 2016.

Traditional advertising

Total advertising spending in 2016

Kids' meals: \$7 million

Other products: \$458 million

TV ads viewed in 2016

	Kids' meals		Other products	
	Avg # of ads viewed	Child:adult targeted ratio	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	11.8	4.70	57.7	0.44
Children (6-11 y)	16.4	6.55	64.0	0.51
Young teens (12-14 y)	9.2	3.70	82.9	0.65

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Subway other products	4,343	1%	48,076	7%
Subway kids' meals	102	<1%	2,163	6%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
Subway.com	30.3	42.5	3%	4%
SubwayKids.com	6.0	0.8	30%	4%
MySubwayCard.com	4.3	2.6	4%	2%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Subway	25,795	2,420	349	11,696

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

Taco Bell

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$340 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	69.1	0.40
Children (6-11 y)	74.8	0.44
Young teens (12-14 y)	110.3	0.65

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Taco Bell	57	<1%	41,606	37%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
TacoBell.com	23.4	46.3	4%	7%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Taco Bell	10,304	1,790	308	5,459

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

The Topps Company

Non-participating company with top-50 child-directed brands

Child-directed brands



Traditional advertising

Total advertising spending in 2016: \$11 million

Juicy Drop Candy: \$3.8 million

Crunchkins: \$2.5 million

Ring Pop: \$1.7million

TV ads viewed in 2016

	Juicy Drop Candy		Crunchkins		Ring Pop	
	Avg # of ads viewed	Child:adult targeted ratio	Avg # of ads viewed	Child:adult targeted ratio	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	37.0	4.22	17.4	3.16	15.8	4.11
Children (6-11 y)	47.6	5.43	21.8	3.95	20.0	5.21
Young teens (12-14 y)	26.0	2.97	13.3	2.42	11.1	2.90

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Ring Pop	280	**	**	
Crunchkins	7	**	**	
Juicy Drop Candy	1	**	**	

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Unilever

Joined the Children’s Food and Beverage Advertising Initiative (CFBAI): November 2006

Top-50 brands¹ in TV advertising viewed by children in 2016

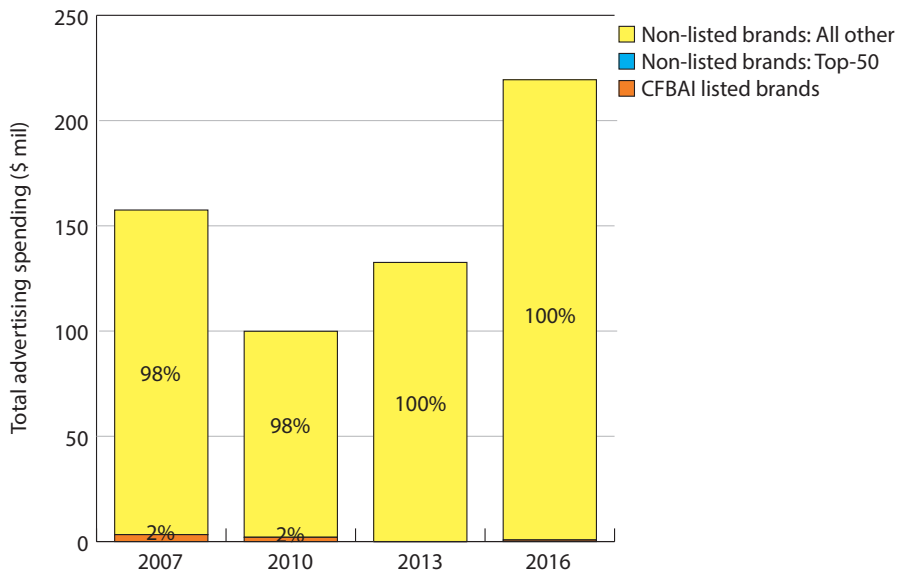
CFBAI listed brands ² that may be in child-directed advertising	Non-listed brands
None	None

Less-advertised CFBAI listed brands³



Traditional advertising

Total advertising spending in 2016: \$219 million, <1% on CFBAI listed brands

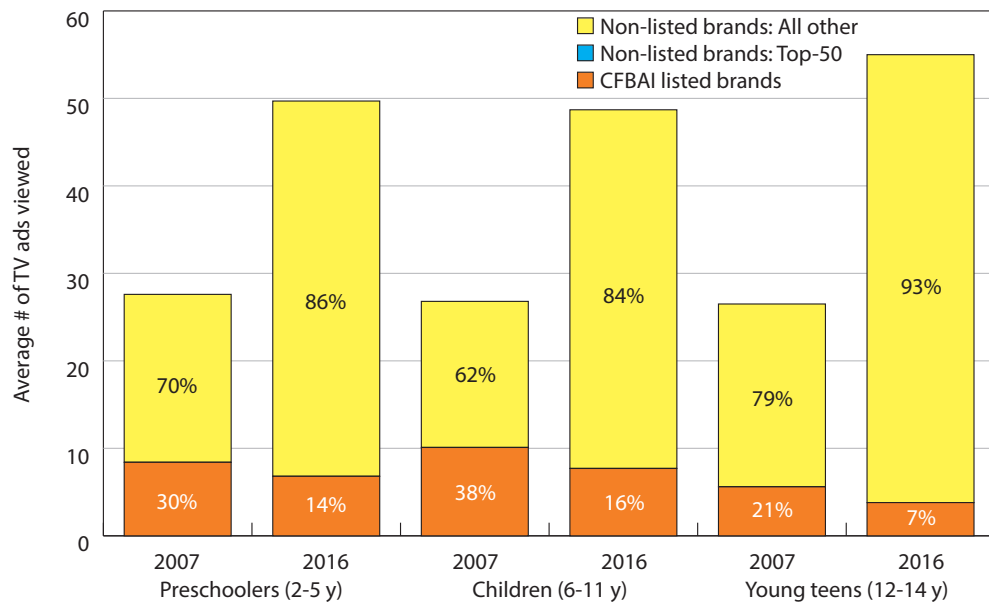


Source: Rudd Center analysis of Nielsen data (2017)

TV ads viewed in 2016

	CFBAI listed brands			Non-listed brands	
	Avg # of ads viewed	Child:adult targeted ratio	% of company total	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	6.8	5.35	14%	42.9	0.40
Children (6-11 y)	7.7	6.07	16%	41.0	0.38
Young teens (12-14 y)	3.8	2.98	7%	51.2	0.48

Source: Rudd Center analysis of Nielsen data (2016)



Source: Rudd Center analysis of Nielsen data (2017)

Digital marketing

Banner advertising on third-party websites in 2016⁴

Brand	CFBAI listed brand	Top-50 brand	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
			# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Ragu			1,701	2%	19,369	23%
Lipton			1,058	1%	8,593	10%
Popsicle	✓		101	6%	0	0%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Social media activity in 2016⁵

CFBAI listed brands

Brand	Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Popsicle		1,243	113		22

Source: Rudd Center analysis of Unmetric data (January - December 2016)

Ranking among 18 CFBAI companies in 2016

Total advertising spending	#11
Total advertising spending on CFBAI listed brands	#10
TV advertising viewed by children ages (2-11)	#14
TV advertising viewed by young teens (12-14)	#13
Child visitors to company websites	#6
Banner advertising on kids' websites	#11
Banner advertising on social media sites	#10
Total Facebook fans	#11
Total YouTube video views	#14

Nutrition

CFBAI listed brands

Brand	Top-50 brand	Products		Nutrition for listed products	
		# products	% included on CFBAI list of child-directed products ⁶	NPI score Median (range)	% meeting Smart Snacks standards
Popsicle		35	23%	63 (62-64)	13%

¹Brands that ranked in the 50 brands advertised most to children on TV in 2016, including brands from CFBAI and non-participating companies

²Brands included on CFBAI list of products that may be advertised to children (July, 2016)

³Brands included on CFBAI list of products that may be advertised to children (July, 2016) that did not rank in the top-50 brands with the most TV advertising to children in 2016

⁴Includes CFBAI listed brands with 100,000 or more banner ads on kids' websites in 2016. Includes CFBAI non-listed brands with 1,000,000 or more banner ads on kids' websites in 2016.

⁵Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views.

⁶As of January 2017

Wendy's

Non-participating company: Top-50 brand



Traditional advertising

Total advertising spending in 2016: \$231 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	67.9	0.47
Children (6-11 y)	73.5	0.50
Young teens (12-14 y)	92.1	0.64

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Banner advertising on third-party websites in 2016

	Banner ads on kids' websites		Banner ads on Facebook and YouTube	
	# of ad impressions (000)	% of total brand impressions	# of ad impressions (000)	% of total brand impressions
Wendy's	1,310	2%	46,394	61%

Source: comScore Ad Metrix Advertiser report (January - December 2016)

Website visits in 2016

	Avg monthly unique visitors (000)		% of total unique visitors	
	2-12 years	13-17 years	2-12 years	13-17 years
	Wendys.com	20.0	29.6	4%

Source: comScore Media Metrix Key Measures report (January - December 2016)

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Wendy's	7,763	992	253	31,547

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

Source: Rudd Center analysis of Unmetric data (January - December 2016)

WhiteWave Foods Co

Non-participating company with a healthy brand



Traditional advertising

Total advertising spending in 2016: \$50 million

TV ads viewed in 2016

	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	7.1	0.42
Children (6-11 y)	6.7	0.40
Young teens (12-14 y)	7.6	0.45

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Silk	704	47	20	5,026

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

Wolfgang Candy Company

Joined the Children's Confection Advertising Initiative (CCAI): June 2016



Traditional advertising

This company had no advertising spending in 2016.

Digital marketing

Active social media accounts in 2016*

Top-50 brand	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Wolfgangcandy	6	**	**	

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views

**Accounts were active in 2016, but data are not available

Source: Rudd Center analysis of Unmetric data (January - December 2016)

The Wonderful Company

Non-participating company with healthy brands



Wonderful
pistachios & almonds™



Traditional advertising

Total advertising spending in 2016: \$96 million

POM Wonderful: \$32 million

Wonderful Pistachios & Almonds: \$30.8 million

Wonderful Halos: \$23.8 million

Fiji Water: \$9.2 million

TV ads viewed in 2016

	POM Wonderful		Wonderful Pistachios & Almonds		Wonderful Halos		Fiji Water	
	Avg # of ads viewed	Child:adult targeted ratio	Avg # of ads viewed	Child:adult targeted ratio	Avg # of ads viewed	Child:adult targeted ratio	Avg # of ads viewed	Child:adult targeted ratio
Preschoolers (2-5 y)	8.4	0.37	6.4	0.38	15.2	1.00	2.8	0.41
Children (6-11 y)	8.1	0.36	6.5	0.38	14.2	0.93	3.1	0.46
Young teens (12-14 y)	9.5	0.42	7.5	0.44	10.4	0.68	4.8	0.71

Source: Rudd Center analysis of Nielsen data (2016)

Digital marketing

Active social media accounts in 2016*

	Facebook fans (000)	Twitter followers (000)	Instagram followers (000)	YouTube views (000)
Wonderful Pistachios & Almonds	815	41	3	208
Wonderful Halos	614	10	24	358
Fiji Water	563	44	26	1,030
POM Wonderful	300	15	8	1,798

*Accounts with activity in 2016 (i.e., posts, tweets, or video uploads) and more than 100,000 Facebook fans or 1 million YouTube views
Source: Rudd Center analysis of Unmetric data (January - December 2016)

Appendix Table A

Table A1. Advertising spending: CFBAI listed brands

		Ad spending											
		2016			2013			2010			2007		
Company	Brand	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)
Total food, beverage and restaurant companies		\$13,541,675.4	\$10,050,827.2	\$3,490,848.2	\$14,350,997.3	\$10,477,055.5	\$3,873,941.8	\$13,863,956.1	\$9,516,292.1	\$4,347,663.9	\$12,603,791.9	\$8,659,850.9	\$3,943,941.0
Total CFBAI companies		\$5,917,884.0	\$4,203,643.6	\$1,714,240.3	\$6,713,339.6	\$4,715,330.7	\$1,998,008.9	\$6,798,316.0	\$4,451,900.6	\$2,346,415.4	\$6,325,092.0	\$4,078,942.8	\$2,246,149.3
Total CFBAI top-50 listed brands		\$482,304.3	\$337,984.4	\$144,319.9	\$535,726.5	\$412,359.3	\$123,367.2	\$539,207.3	\$422,904.8	\$116,302.4	\$388,407.1	\$311,288.0	\$77,119.1
General Mills	Cheerios	\$124,827.8	\$111,126.7	\$13,701.1	\$166,539.1	\$148,428.1	\$18,111.0	\$141,155.8	\$119,420.5	\$21,735.3	\$113,244.4	\$102,138.2	\$11,106.2
General Mills	Big G Cereals	\$79,684.4	\$46,121.4	\$33,563.0	\$15,302.6	\$8,763.7	\$6,538.9	\$33,112.6	\$31,030.5	\$2,082.1	\$21,201.7	\$18,787.1	\$2,414.6
The Kraft Heinz Company	Lunchables	\$61,639.3	\$15,906.3	\$45,733.0	\$37,583.3	\$16,856.7	\$20,726.6	\$22,461.2	\$7,640.9	\$14,820.3	\$30,408.7	\$11,039.9	\$19,368.9
McDonald's	Happy Meal	\$32,927.1	\$27,707.5	\$5,219.6	\$53,395.5	\$42,423.7	\$10,971.9	\$99,851.5	\$82,517.7	\$17,333.8	\$49,270.9	\$45,899.9	\$3,371.0
The Kraft Heinz Company	Capri Sun	\$30,920.6	\$9,314.0	\$21,606.6	\$19,863.1	\$18,482.2	\$1,380.9	\$19,993.6	\$15,978.7	\$4,014.9	\$19,252.4	\$11,884.0	\$7,368.4
The Kraft Heinz Company	Kraft Macaroni & Cheese	\$28,480.0	\$17,577.7	\$10,902.3	\$35,860.7	\$23,140.2	\$12,720.5	\$23,748.3	\$19,340.4	\$4,408.0	\$33,570.8	\$21,076.1	\$12,494.7
Campbell Soup Company	Pepperidge Farm Goldfish	\$27,617.9	\$19,458.7	\$8,159.2	\$29,034.4	\$13,395.8	\$15,638.6	\$14,727.0	\$9,158.9	\$5,568.0	\$16,174.7	\$10,090.6	\$6,084.1
General Mills	Cinnamon/French Toast Crunch	\$24,824.2	\$24,816.5	\$7.7	\$39,686.6	\$28,586.8	\$11,099.8	\$25,763.4	\$16,531.6	\$9,231.9	\$9,261.5	\$8,853.9	\$407.6
Kellogg Company	Frosted Flakes	\$24,484.4	\$24,453.8	\$30.6	\$36,294.2	\$29,203.3	\$7,090.9	\$31,889.0	\$24,437.3	\$7,451.7	\$12,108.9	\$9,105.5	\$3,003.4
General Mills	Yoplait Go-Gurt	\$10,902.7	\$10,127.6	\$775.0	\$16,683.7	\$16,293.0	\$390.8	\$20,337.9	\$16,418.8	\$3,919.1	\$10,498.9	\$10,162.8	\$336.2
General Mills	Lucky Charms Fruity/Cocoa Pebbles	\$9,085.8	\$8,970.8	\$115.1	\$21,036.4	\$19,457.7	\$1,578.7	\$12,003.2	\$10,520.9	\$1,482.3	\$12,058.3	\$11,318.1	\$740.3
Post Foods		\$8,427.0	\$4,193.6	\$4,233.4	\$6,583.4	\$5,039.5	\$1,543.9	\$9,415.2	\$4,678.3	\$4,736.9	\$13,052.7	\$12,451.5	\$601.2
Kellogg Company	Froot Loops	\$5,511.9	\$5,360.4	\$151.5	\$9,296.3	\$7,423.6	\$1,872.8	\$36,285.5	\$28,071.5	\$8,214.0	\$8,862.7	\$8,390.1	\$472.6
General Mills	Betty Crocker Fruit Snacks	\$4,984.9	\$4,981.3	\$3.6	\$12,227.8	\$12,083.3	\$144.6	\$15,521.9	\$14,447.8	\$1,074.1	\$16,867.8	\$15,110.0	\$1,757.8
The Kraft Heinz Company	Kool-Aid	\$4,009.9	\$3,891.6	\$118.3	\$28,754.7	\$15,197.4	\$13,557.4	\$24,273.9	\$14,663.4	\$9,610.5	\$19,701.7	\$12,139.6	\$7,562.1
General Mills	Cocoa Puffs	\$3,976.6	\$3,976.6	\$0.0	\$7,584.3	\$7,584.3	\$0.0	\$8,667.4	\$8,047.9	\$619.5	\$2,870.8	\$2,840.8	\$30.1

Appendix Table A

Table A1. Advertising spending: CFBAI listed brands (continued)

		Ad spending											
		2016			2013			2010			2007		
		Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)
Total CFBAI less-advertised listed brands		\$253,410.5	\$203,711.4	\$49,699.1	\$298,767.9	\$210,597.5	\$88,170.4	\$375,873.9	\$294,678.8	\$81,195.1	\$379,641.6	\$314,544.7	\$65,097.0
Company	Brand												
The Dannon Company	Activia, DanActive, Danimals, Dannon Yogurt, Dannon Dairy Drinks, Light & Fit Yogurt, Light & Fit Yogurt Drinks, Oikos Yogurt	\$96,287.9	\$92,722.3	\$3,565.5	\$82,147.5	\$77,954.2	\$4,193.3	\$108,984.7	\$97,629.6	\$11,355.2	\$103,790.4*	\$97,400.1*	\$6,390.3*
Kellogg Company	Apple/Cinnamon Jacks, Corn Pops, Eggo, Frosted Mini-Wheats, Rice Krispies, Scooby Doo	\$86,071.9	\$59,800.4	\$26,271.4	\$115,812.7	\$72,455.9	\$43,356.8	\$127,647.0	\$104,392.0	\$23,254.9	\$128,752.9	\$99,124.3	\$29,628.6
PepsiCo	Quaker Life, Quaker Oats	\$68,114.0	\$48,365.7	\$19,748.3	\$33,990.6	\$17,744.5	\$16,246.1	\$21,363.5	\$7,442.4	\$13,921.1	\$32,938.9	\$28,283.7	\$4,655.2
General Mills	Kids' cereals: Monsters, Cookie Crisp, Golden Grahams, Reese's Peanut Butter Puffs, Trix	\$1,169.9	\$1,169.9	\$0.0	\$17,244.7	\$16,657.1	\$587.6	\$22,404.3	\$21,124.4	\$1,279.9	\$22,892.6	\$21,435.4	\$1,457.2
ConAgra Foods	Kid Cuisine, Peter Pan Peanut Butter, Chef Boyardee	\$1,071.5	\$987.9	\$83.5	\$17,604.9	\$9,440.7	\$8,164.2	\$23,583.4	\$17,778.3	\$5,805.1	\$22,593.7	\$16,412.8	\$6,180.9
Unilever	Popsicle	\$666.0	\$665.1	\$0.9	\$1.9	\$0.0	\$1.9	\$2,026.2	\$793.0	\$1,233.2	\$3,327.5	\$1,794.0	\$1,533.5
The Kraft Heinz Company	Kraft/Polly-O, Kraft Singles	\$29.3	\$0.0	\$29.3	\$27,014.9	\$12,466.6	\$14,548.3	\$44,682.2	\$21,609.9	\$23,072.3	\$33,915.8	\$19,592.6	\$14,323.3
Post Foods	Honey-Comb	\$0.1	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$1,273.5	\$0.0	\$1,273.5	\$7,566.4	\$7,469.4	\$97.0
Campbell Soup Company	Bolthouse Farms	\$0.0	\$0.0	\$0.0	\$1,072.3	\$0.0	\$1,072.3	\$217.2	\$217.2	\$0.0	\$0.0	\$0.0	\$0.0

Table A1. Advertising spending: CFBAI listed brands (continued)

		Ad spending											
		2016			2013			2010			2007		
		Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)
General Mills	Kids' yogurts: Yoplait Trix, Yoplait Kid Cup	\$0.0	\$0.0	\$0.0	\$3,877.4	\$3,877.4	\$0.0	\$5,268.5	\$5,268.5	\$0.0	\$7,617.2	\$7,107.1	\$510.2
Burger King Corporation	Kids' Meals	\$0.0	\$0.0	\$0.0	\$1.0	\$1.0	\$0.0	\$18,423.4	\$18,423.4	\$0.0	\$16,246.1	\$15,925.4	\$320.7

*Company had not joined CFBAI

Table A2. Advertising spending: CFBAI non-listed brands

	Ad spending												
	2016			2013			2010			2007			
	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	
Total food, beverage and restaurant companies	\$13,541,675.4	\$10,050,827.2	\$3,490,848.2	\$14,350,997.3	\$10,477,055.5	\$3,873,941.8	\$13,863,956.1	\$9,516,292.1	\$4,347,663.9	\$12,603,791.9	\$8,659,850.9	\$3,943,941.0	
Total CFBAI companies	\$5,917,884.0	\$4,203,643.6	\$1,714,240.3	\$6,713,339.6	\$4,715,330.7	\$1,998,008.9	\$6,798,316.0	\$4,451,900.6	\$2,346,415.4	\$6,325,092.0	\$4,078,942.8	\$2,246,149.3	
Total CFBAI top-50 non-listed brands	\$1,796,192.4	\$1,342,374.7	\$453,817.8	\$1,751,555.2	\$1,302,565.8	\$448,989.4	\$1,655,591.6	\$1,123,347.9	\$532,243.7	\$1,235,961.7	\$834,952.2	\$401,009.4	
Company	Brand												
McDonald's	Other (including Mighty Kids Meal)	\$765,548.1	\$552,622.3	\$212,925.8	\$939,154.8	\$657,099.8	\$282,055.1	\$789,465.9	\$524,352.8	\$265,113.1	\$701,030.3	\$490,063.6	\$210,966.7
Burger King Corporation	Other (incl. Big Kids Meal)	\$313,971.3	\$255,175.5	\$58,795.8	\$248,624.1	\$201,591.8	\$47,032.3	\$268,660.1	\$216,377.1	\$52,283.0	\$225,176.4	\$169,159.1	\$56,017.4
The Coca-Cola Company	Coca Cola	\$271,714.5	\$182,842.2	\$88,872.2	\$123,624.7	\$74,491.5	\$49,133.2	\$183,423.8	\$84,814.8	\$98,609.0	\$157,295.1	\$83,241.6	\$74,053.5
The Hershey Company	Hershey's	\$105,244.3	\$85,402.5	\$19,841.8	\$190,637.4	\$156,777.7	\$33,859.7	\$143,760.2	\$94,925.6	\$48,834.6	\$53,149.0	\$21,510.4	\$31,638.6
The Hershey Company	Reese's	\$102,274.4	\$82,959.0	\$19,315.4	\$84,614.9	\$83,758.0	\$856.8	\$93,222.9	\$83,613.3	\$9,609.6	\$19,422.7	\$15,558.1	\$3,864.7
General Mills	Yoplait Yogurt	\$83,424.8	\$78,447.6	\$4,977.2	\$44,533.6	\$40,894.3	\$3,639.3	\$59,604.8	\$47,171.5	\$12,433.3	\$27,283.4	\$17,303.1	\$9,980.4
PepsiCo	Lay's Potato Chips	\$66,581.9	\$37,958.7	\$28,623.2	\$44,913.6	\$28,343.9	\$16,569.8	\$21,573.0	\$9,211.8	\$12,361.2	\$30,545.6	\$21,466.0	\$9,079.5
The Hershey Company	Kit Kat	\$49,087.0	\$37,429.9	\$11,657.1	\$45,446.2	\$37,969.3	\$7,476.8	\$40,019.5	\$38,494.9	\$1,524.5	\$1,325.5	\$0.0	\$1,325.5
Kellogg Company	Pop Tarts	\$38,346.1	\$29,536.9	\$8,809.2	\$30,005.9	\$21,639.4	\$8,366.5	\$55,861.4	\$24,386.1	\$31,475.3	\$20,733.7	\$16,650.5	\$4,083.2

Appendix Table A

Table A2. Advertising spending: CFBAI non-listed brands (continued)

		Ad spending											
		2016			2013			2010			2007		
		Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)
Total CFBAI all other non-listed brands		\$3,111,976.7	\$2,113,190.5	\$998,786.2	\$3,772,741.3	\$2,532,236.4	\$1,240,504.8	\$4,055,356.0	\$2,485,942.1	\$1,569,414.0	\$4,122,349.8	\$2,495,299.2	\$1,627,050.6
Company	Brand												
PepsiCo	All other brands	\$508,245.2	\$397,346.8	\$110,898.3	\$566,387.1	\$420,433.3	\$145,953.8	\$426,242.1	\$295,796.3	\$130,445.8	\$678,701.7	\$473,541.8	\$205,159.9
The Kraft Heinz Company	All other brands	\$416,873.5	\$178,468.2	\$238,405.3	\$497,906.0	\$247,950.0	\$249,956.0	\$407,599.6	\$158,435.6	\$249,164.0	\$506,788.3	\$230,669.1	\$276,119.2
Mars	All other brands	\$367,800.3	\$209,615.5	\$158,184.8	\$338,461.4	\$155,038.6	\$183,422.8	\$334,669.0	\$191,401.9	\$143,267.2	\$339,224.0	\$208,129.0	\$131,095.1
Nestle USA	All brands	\$309,582.3	\$196,868.3	\$112,714.0	\$361,359.2	\$241,959.1	\$119,400.1	\$494,077.7	\$244,009.4	\$250,068.3	\$397,157.4*	\$246,243.5*	\$150,913.9*
The Coca-Cola Company	All other brands	\$242,542.2	\$174,884.1	\$67,658.1	\$178,205.5	\$131,947.9	\$46,257.6	\$260,617.1	\$181,261.0	\$79,356.1	\$213,477.6	\$134,970.9	\$78,506.7
General Mills	All other brands	\$233,183.5	\$202,622.7	\$30,560.7	\$471,694.0	\$408,501.5	\$63,192.5	\$597,053.0	\$478,596.4	\$118,456.6	\$360,156.8	\$269,965.5	\$90,191.3
Unilever	All other brands	\$218,743.0	\$140,415.9	\$78,327.0	\$132,569.7	\$85,137.9	\$47,431.8	\$97,936.3	\$44,363.9	\$53,572.4	\$154,164.2	\$60,118.9	\$94,045.3
Kellogg Company	All other brands	\$178,745.9	\$117,434.1	\$61,311.9	\$352,595.9	\$223,852.9	\$128,743.0	\$390,122.0	\$239,015.3	\$151,106.7	\$377,781.0	\$256,167.8	\$121,613.2
Mondelez Global	All brands	\$176,883.2	\$113,276.9	\$63,606.3	\$158,925.7	\$108,536.1	\$50,389.6	\$254,952.6*	\$171,000.2*	\$83,952.4*	\$359,552.3*	\$188,607.7*	\$170,944.6*
The Hershey Company	All other brands	\$133,006.2	\$110,130.5	\$22,875.6	\$188,550.8	\$166,731.8	\$21,819.1	\$87,308.9	\$84,324.6	\$2,984.3	\$6,299.6	\$3.0	\$6,296.6
Campbell Soup Company	All other brands	\$108,430.9	\$87,023.6	\$21,407.2	\$274,974.5	\$170,444.8	\$104,529.7	\$399,522.0	\$203,380.6	\$196,141.4	\$460,569.3	\$278,083.0	\$182,486.3
ConAgra Foods	All other brands	\$73,778.1	\$63,209.7	\$10,568.4	\$106,331.8	\$70,420.6	\$35,911.3	\$144,485.6	\$92,595.2	\$51,890.5	\$149,898.8	\$92,081.3	\$57,817.6
Post Foods	All other brands	\$70,294.0	\$51,679.0	\$18,614.9	\$83,630.2	\$55,919.0	\$27,711.1	\$81,661.4	\$39,035.3	\$42,626.1	\$86,518.8	\$34,853.6	\$51,665.2
Ferrero USA	All brands	\$68,186.2	\$65,322.0	\$2,864.3	\$54,395.6	\$42,596.9	\$11,798.7	\$46,389.0	\$41,362.2	\$5,026.8	\$28,095.5	\$21,628.3	\$6,467.2
The Dannon Company	All other brands	\$5,679.5	\$4,893.1	\$786.4	\$4,026.0	\$207.6	\$3,818.4	\$30,575.2	\$19,309.8	\$11,265.4	\$3,964.3*	\$235.8*	\$3,728.5
American Licorice Company	All brands	\$2.8	\$0.0	\$2.8	\$2,727.9*	\$2,558.6*	\$169.3*	\$2,144.5*	\$2,054.5*	\$90.0*	\$0.0*	\$0.0*	\$0.0*

*Company had not joined CFBAI

Appendix Table A

Table A3. Advertising spending: CCAI companies and non-participating companies with healthy brands

	Ad spending												
	2016			2013			2010			2007			
	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	
Total food, beverage and restaurant companies	\$13,541,675.4	\$10,050,827.2	\$3,490,848.2	\$14,350,997.3	\$10,477,055.5	\$3,873,941.8	\$13,863,956.1	\$9,516,292.1	\$4,347,663.9	\$12,603,791.9	\$8,659,850.9	\$3,943,941.0	
Total CCAI and non-participating companies with healthy brands	\$309,073.9	\$209,167.6	\$99,836.3	\$254,317.4	\$164,338.1	\$89,979.3	\$143,225.0	\$78,666.5	\$64,558.5	\$98,713.9	\$33,634.4	\$65,079.5	
Total CCAI companies	\$18,363.7	\$10,996.2	\$7,297.5	\$34,091.2	\$24,712.3	\$9,378.9	\$23,443.3	\$15,839.2	\$7,604.0	\$27,473.3	\$12,848.4	\$14,624.9	
Company													
Ghirardelli Chocolate	\$13,872.2	\$7,989.4	\$5,882.8	\$25,478.8	\$19,687.4	\$5,791.4	\$17,040.0	\$15,754.6	\$1,285.4	\$22,351.0	\$12,684.3	\$9,666.7	
Jelly Belly Candy Company	\$4,221.8	\$3,006.8	\$1,215.0	\$1,924.9	\$434.9	\$1,490.0	\$5,141.7	\$84.6	\$5,057.1	\$3,644.6	\$164.1	\$3,480.5	
Just Born Quality Confections	\$193.0	\$0.0	\$193.0	\$6,616.6	\$4,590.0	\$2,026.6	\$1,252.6	\$0.0	\$1,252.6	\$1,468.0	\$0.0	\$1,468.0	
The Promotion in Motion Companies	\$70.0	\$0.0	\$0.0	\$56.0	\$0.0	\$56.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	
Brown & Haley	\$6.7	\$0.0	\$6.7	\$15.0	\$0.0	\$15.0	\$9.0	\$0.0	\$9.0	\$9.8	\$0.0	\$9.8	
Ferrara Candy Company	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	
R.M. Palmer Company	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	
Wolfgang Candy Company	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	
Total non-participating companies with healthy brands	\$290,710.2	\$198,171.4	\$92,538.8	\$220,226.2	\$139,625.8	\$80,600.3	\$119,781.7	\$62,827.3	\$56,954.4	\$71,240.6	\$20,786.0	\$50,454.6	
Company	Brand												
MilkPEP	MilkPEP	\$57,511.7	\$35,895.1	\$21,616.6	\$58,976.8	\$32,002.2	\$26,974.6	\$10.7	\$0.0	\$10.7	\$20.6	\$0.0	\$20.6
WhiteWave Foods Co	Silk	\$49,616.4	\$22,726.9	\$26,889.4	\$35,194.2	\$20,242.2	\$14,951.9	\$36,977.4	\$16,887.7	\$20,089.7	\$22,792.9	\$13,858.8	\$8,934.1
Chobani	Chobani	\$42,875.0	\$39,743.1	\$3,132.0	\$27,223.0	\$17,907.6	\$9,315.4	\$35.0	\$0.0	\$35.0	\$0.0	\$0.0	\$0.0
The Wonderful Company	POM Wonderful	\$32,043.9	\$25,884.7	\$6,159.2	\$3,422.7	\$0.0	\$3,422.7	\$8,696.5	\$8,222.6	\$473.9	\$2,224.4	\$0.0	\$2,224.4
The Wonderful Company	Pistachios & Almonds	\$30,816.3	\$21,121.4	\$9,695.0	\$34,763.4	\$30,902.3	\$3,861.0	\$14,047.8	\$13,328.6	\$719.2	\$0.0	\$0.0	\$0.0
WhiteWave Foods Co	All other brands	\$23,911.0	\$13,519.8	\$10,391.2	\$35,689.4	\$17,594.5	\$18,094.9	\$35,082.6	\$18,079.5	\$17,003.1	\$20,488.1	\$1,154.2	\$19,333.9
The Wonderful Company	Wonderful Halos	\$23,831.6	\$17,452.3	\$6,379.3	\$5,792.5	\$5,519.0	\$273.5	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
The Wonderful Company	Fiji Water	\$9,214.7	\$5,428.6	\$3,786.1	\$587.9	\$0.0	\$587.9	\$624.7	\$0.0	\$624.7	\$5,641.0	\$0.0	\$5,641.0
Dole Food Company	Dole Fruit Bowls	\$7,217.0	\$6,853.8	\$363.1	\$6,173.9	\$6,021.6	\$152.3	\$1,050.2	\$0.0	\$1,050.2	\$3,313.9	\$0.0	\$3,313.9
Birds Eye	Birds Eye Frozen Vegetables/Entrees	\$4,345.6	\$4,180.6	\$165.1	\$9,215.0	\$8,883.2	\$331.8	\$7,158.1	\$2,632.6	\$4,525.5	\$7,928.3	\$5,247.2	\$2,681.1
Dole Food Company	All other brands	\$4,040.3	\$3,107.7	\$932.6	\$2,934.4	\$553.2	\$2,381.3	\$12,620.0	\$3,676.3	\$8,943.7	\$1,989.6	\$525.7	\$1,463.9
Dole Food Company	Dole Fruitocracy	\$2,664.3	\$2,257.3	\$407.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
The Wonderful Company	All other brands	\$2,622.4	\$0.0	\$2,622.4	\$253.0	\$0.0	\$253.0	\$3,478.7	\$0.0	\$3,478.7	\$6,841.6	\$0.0	\$6,841.6

Appendix Table A

Table A4. Advertising spending: non-participating top-50 companies

		Ad spending											
		2016			2013			2010			2007		
		Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)
Total food, beverage and restaurant companies		\$13,541,675.4	\$10,050,827.2	\$3,490,848.2	\$14,350,997.3	\$10,477,055.5	\$3,873,941.8	\$13,863,956.1	\$9,516,292.1	\$4,347,663.9	\$12,603,791.9	\$8,659,850.9	\$3,943,941.0
Total non-participating top-50 companies		\$3,438,969.6	\$2,991,889.5	\$447,080.1	\$3,489,817.7	\$3,103,444.7	\$386,373.0	\$3,013,370.8	\$2,686,956.2	\$326,414.7	\$2,790,185.1	\$2,520,422.4	\$269,762.7
Company	Brand												
Total non-participating companies with top-50 child-directed brands		\$1,068,759.5	\$896,738.3	\$172,021.2	\$1,153,646.5	\$984,977.7	\$168,668.8	\$999,233.6	\$837,724.0	\$161,509.6	\$896,340.7	\$767,087.9	\$129,252.8
Subway	All other	\$457,451.6	\$384,847.3	\$72,604.3	\$553,187.8	\$474,026.5	\$79,161.3	\$474,939.0	\$408,666.1	\$66,273.0	\$339,278.1	\$301,273.2	\$38,004.9
Sonic	All other	\$241,975.5	\$222,901.5	\$19,074.0	\$211,494.1	\$196,147.0	\$15,347.1	\$149,611.2	\$127,220.8	\$22,390.4	\$164,663.9	\$146,423.7	\$18,240.2
Wendy's	All other	\$230,656.7	\$175,432.9	\$55,223.8	\$286,705.7	\$221,837.5	\$64,868.2	\$268,559.9	\$204,604.8	\$63,955.1	\$296,817.5	\$237,980.6	\$58,837.0
Chuck E. Cheese's		\$28,005.7	\$19,886.2	\$8,119.5	\$26,041.1	\$24,659.2	\$1,381.8	\$23,752.2	\$22,552.9	\$1,199.3	\$22,650.4	\$19,074.6	\$3,575.8
Fromageries Bel SA	Mini Babybel	\$27,160.4	\$15,818.5	\$11,342.0	\$15,163.7	\$15,163.7	\$0.0	\$12,587.8	\$12,476.4	\$111.4	\$4,072.7	\$3,702.5	\$370.2
Dave & Busters		\$22,774.5	\$22,259.0	\$515.4	\$18,093.0	\$16,747.2	\$1,345.8	\$18,493.5	\$15,668.8	\$2,824.7	\$11,399.4	\$10,277.0	\$1,122.4
Perfetti Van Melle	Mentos	\$14,624.6	\$14,489.9	\$134.8	\$7,873.1	\$3,429.6	\$4,443.6	\$17,949.6	\$15,867.3	\$2,082.2	\$88.4	\$0.0	\$88.4
Fromageries Bel SA	Laughing Cow	\$12,078.0	\$12,077.9	\$0.0	\$15,509.2	\$15,402.9	\$106.3	\$17,477.3	\$17,340.9	\$136.4	\$5,740.1	\$0.0	\$5,740.1
Fromageries Bel SA	Laughing Cow Cheese Dippers Snacks	\$9,406.2	\$9,406.2	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Subway	Kids' meals	\$6,834.9	\$2,055.4	\$4,779.5	\$4,428.7	\$2,634.9	\$1,793.8	\$243.1	\$198.5	\$44.6	\$41,295.6	\$39,443.6	\$1,852.0
Perfetti Van Melle	Air Heads	\$6,833.0	\$6,770.6	\$62.4	\$4,934.6	\$4,934.1	\$0.5	\$5,379.2	\$5,180.5	\$198.6	\$3,921.7	\$3,899.9	\$21.7
TOPPS	Juicy Drop Candy	\$3,836.3	\$3,836.3	\$0.0	\$2,239.3	\$2,239.3	\$0.0	\$884.2	\$884.2	\$0.0	\$842.5	\$823.8	\$18.6
TOPPS	All other brands	\$2,553.7	\$2,553.7	\$0.0	\$3,509.0	\$3,509.0	\$0.0	\$1,714.4	\$1,691.3	\$23.1	\$3,549.5	\$3,411.3	\$138.1
TOPPS	Crunchkins	\$2,522.5	\$2,522.5	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
TOPPS	Ring Pop	\$1,722.7	\$1,722.7	\$0.0	\$1,255.0	\$1,116.9	\$138.1	\$1,084.7	\$1,052.8	\$31.9	\$773.6	\$773.6	\$0.0
Sonic	Kids' meals	\$146.3	\$146.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Perfetti Van Melle	All other brands	\$135.3	\$0.0	\$135.3	\$0.0	\$0.0	\$0.0	\$0.5	\$0.0	\$0.5	\$190.7	\$0.0	\$190.7
Fromageries Bel SA	All other brands	\$31.4	\$1.2	\$30.2	\$94.6	\$12.2	\$82.4	\$6,557.0	\$4,318.7	\$2,238.3	\$1,054.0	\$1.3	\$1,052.7
Wendy's	Kids' meals	\$10.4	\$10.4	\$0.0	\$3,117.6	\$3,117.6	\$0.0	\$0.0	\$0.0	\$0.0	\$2.7	\$2.7	\$0.0

Appendix Table A

Table A4. Advertising spending: non-participating top-50 companies (continued)

	Ad spending											
	2016			2013			2010			2007		
	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)	Total ad spending (\$000)	TV spending (\$000)	All other spending (\$000)
Non-participating top-50 fast food restaurants	\$1,767,441.8	\$1,558,482.3	\$208,959.5	\$1,570,903.2	\$1,425,365.9	\$145,537.3	\$1,299,391.3	\$1,179,654.4	\$119,736.9	\$1,255,359.3	\$1,165,542.4	\$89,816.9
Taco Bell	\$339,527.2	\$284,220.8	\$55,306.3	\$317,008.3	\$279,745.3	\$37,263.0	\$266,597.9	\$245,901.9	\$20,695.9	\$246,164.2	\$228,277.1	\$17,887.0
Domino's Pizza	\$277,122.8	\$236,999.6	\$40,123.2	\$186,709.7	\$160,893.2	\$25,816.4	\$161,020.4	\$125,484.1	\$35,536.2	\$141,380.5	\$119,597.2	\$21,783.3
KFC	\$204,200.6	\$186,787.8	\$17,412.9	\$263,402.4	\$242,462.4	\$20,940.0	\$227,720.3	\$202,662.1	\$25,058.3	\$289,484.5	\$275,541.2	\$13,943.2
Pizza Hut	\$202,994.2	\$192,326.4	\$10,667.8	\$239,356.4	\$225,955.4	\$13,401.1	\$232,079.2	\$222,518.7	\$9,560.5	\$235,622.3	\$218,267.2	\$17,355.1
Papa John's	\$165,224.0	\$146,543.6	\$18,680.4	\$158,247.9	\$151,781.9	\$6,465.9	\$137,852.2	\$131,821.2	\$6,031.0	\$103,465.0	\$98,528.4	\$4,936.7
Little Caesars	\$161,684.5	\$134,745.9	\$26,938.5	\$109,362.2	\$92,488.7	\$16,873.5	\$20,593.5	\$16,111.4	\$4,482.1	\$10,324.8	\$7,023.8	\$3,301.0
Arby's	\$150,271.3	\$144,524.1	\$5,747.3	\$118,570.8	\$113,984.1	\$4,586.7	\$107,100.3	\$102,506.4	\$4,593.9	\$127,532.6	\$123,691.8	\$3,840.8
Popeye's	\$138,971.6	\$106,513.8	\$32,457.8	\$89,528.5	\$72,081.4	\$17,447.1	\$61,461.1	\$49,142.8	\$12,318.3	\$35,354.2	\$31,058.7	\$4,295.5
Dairy Queen	\$127,445.6	\$125,820.3	\$1,625.3	\$88,717.0	\$85,973.4	\$2,743.5	\$84,966.4	\$83,505.7	\$1,460.7	\$66,031.2	\$63,556.9	\$2,474.4
Non-participating top-50 casual restaurants	\$602,768.3	\$536,668.9	\$66,099.4	\$765,268.0	\$693,101.1	\$72,166.9	\$714,746.0	\$669,577.8	\$45,168.1	\$638,485.1	\$587,792.1	\$50,693.0
Olive Garden	\$130,708.2	\$116,674.3	\$14,034.0	\$161,898.0	\$139,729.6	\$22,168.3	\$156,419.7	\$134,754.6	\$21,665.1	\$125,114.3	\$123,670.5	\$1,443.8
Applebee's	\$122,774.5	\$106,157.1	\$16,617.4	\$149,409.3	\$143,837.5	\$5,571.8	\$131,316.3	\$124,740.3	\$6,576.0	\$154,203.7	\$142,460.6	\$11,743.1
Chili's Grill & Bar	\$96,095.3	\$86,079.5	\$10,015.8	\$93,279.4	\$84,231.8	\$9,047.6	\$104,589.1	\$101,647.8	\$2,941.3	\$76,365.2	\$68,800.7	\$7,564.5
Red Lobster	\$79,439.9	\$78,657.6	\$782.4	\$147,558.4	\$134,658.0	\$12,900.3	\$124,080.4	\$119,631.2	\$4,449.2	\$118,339.4	\$115,631.6	\$2,707.8
Outback Steakhouse	\$69,941.8	\$63,635.4	\$6,306.4	\$97,990.9	\$90,958.2	\$7,032.6	\$92,153.1	\$88,431.7	\$3,721.3	\$85,677.0	\$63,665.6	\$22,011.4
Denny's Restaurant	\$61,378.7	\$46,441.9	\$14,936.8	\$59,320.6	\$47,178.2	\$12,142.4	\$67,287.4	\$64,641.8	\$2,645.6	\$54,763.7	\$51,955.1	\$2,808.6
Golden Corral Restaurant	\$42,429.8	\$39,023.2	\$3,406.6	\$55,811.5	\$52,507.6	\$3,303.9	\$38,899.9	\$35,730.3	\$3,169.6	\$24,021.8	\$21,608.0	\$2,413.8

Table B1. TV advertising exposure: CFBAI listed brands on all TV programming

	Total ads viewed															
	2016				2013				2010				2007			
	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y
Total food, beverage and restaurant companies	3,811.3	4,023.4	4,112.3	6,291.1	4,394.6	4,624.5	5,502.3	6,962.0	4,194.4	4,889.4	5,570.3	6,148.9	3,960.7	4,519.1	4,802.9	4,862.6
Total CFBAI companies	1,984.8	2,218.1	2,145.9	3,094.1	2,652.0	2,792.4	3,067.5	3,661.5	2,645.8	3,153.5	3,298.9	3,347.0	2,786.6	3,219.8	2,982.3	2,691.5
Total CFBAI top-50 listed brands	775.4	957.1	560.7	320.4	972.1	1,040.4	687.9	372.1	939.2	1,117.2	715.0	325.5	746.7	887.9	518.6	197.3
Company	Brand															
McDonald's	Happy Meal															
	139.0	157.6	79.9	31.5	190.8	205.9	122.5	41.5	198.8	233.7	138.0	54.5	99.0	115.7	65.9	23.8
The Kraft Heinz Company	Lunchables															
	68.1	96.8	57.8	22.1	49.1	61.4	51.6	21.7	23.2	29.2	16.2	5.2	35.1	44.4	25.5	6.7
General Mills	Big G Cereals															
	66.6	79.1	48.1	38.6	38.6	37.9	24.7	12.9	36.2	42.8	38.6	28.3	21.4	23.6	16.8	11.4
General Mills	Cinnamon/French Toast Crunch															
	51.8	61.4	37.3	23.0	97.6	95.9	62.5	41.1	56.8	67.4	44.9	20.4	46.2	53.6	28.9	6.4
General Mills	Cheerios															
	51.1	59.3	53.1	68.1	101.4	101.4	87.3	101.8	65.5	77.1	62.8	51.8	63.1	73.5	54.2	40.1
The Kraft Heinz Company	Capri Sun															
	49.1	67.4	37.5	14.7	41.4	50.4	34.1	15.1	47.2	63.5	50.8	25.3	31.3	39.3	26.4	18.1
General Mills	Yoplait Go-Gurt															
	48.9	55.4	29.3	14.7	79.5	77.5	47.0	24.7	44.2	50.0	33.0	18.6	48.0	55.2	30.0	6.7
Kellogg Company	Froot Loops															
	44.9	52.8	27.2	9.5	36.2	42.0	24.7	7.0	48.6	55.5	35.3	21.0	39.3	44.6	23.7	6.1
General Mills	Betty Crocker Fruit Snacks															
	40.2	46.1	23.9	9.8	90.1	89.9	50.8	18.1	104.7	119.0	68.2	16.2	72.1	81.0	43.3	9.8
Post Foods	Fruity/Cocoa Pebbles															
	39.4	50.5	27.5	9.0	44.6	56.4	34.9	9.6	59.7	71.8	38.5	10.1	54.7	72.0	39.9	11.8
General Mills	Lucky Charms															
	34.5	42.0	23.7	11.4	70.7	69.8	43.7	24.6	47.3	55.4	31.5	7.8	57.3	66.3	35.0	8.0
Kellogg Company	Frosted Flakes															
	32.6	40.4	28.0	22.9	26.9	33.2	26.8	18.8	60.5	72.5	43.5	16.6	37.9	40.8	21.9	6.2
The Kraft Heinz Company	Kool-Aid															
	31.1	42.6	22.9	7.4	0.0	0.0	0.0	0.0	30.1	41.8	35.7	20.9	41.0	54.5	35.9	18.0
The Kraft Heinz Company	Kraft Macaroni & Cheese															
	30.2	42.0	26.6	19.2	4.4	5.1	7.5	11.3	35.1	43.5	27.2	15.3	36.6	48.0	30.9	14.3
Campbell Soup Company	Pepperidge Farm Goldfish															
	25.2	37.6	24.7	13.7	43.3	57.6	38.6	14.4	39.8	46.7	24.0	6.8	46.9	54.7	29.3	7.4
General Mills	Cocoa Puffs															
	22.5	26.2	13.2	4.6	57.6	56.0	31.1	9.5	41.6	47.3	26.7	6.6	17.0	20.7	11.0	2.5

Table B1. TV advertising exposure: CFBAI listed brands on all TV programming (continued)

		Total ads viewed															
		2016				2013				2010				2007			
		2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y
Total CFBAI less-advertised listed brands		105.3	116.1	96.9	165.7	296.7	308.8	217.5	182.2	500.7	574.9	382.7	271.0	596.3	688.6	425.3	246.1
Company	Brand																
The Dannon Company	Activia, DanActive, Danimals, Dannon Yogurt, Dannon Dairy Drinks, Light & Fit Yogurt, Light & Fit Yogurt Drinks, Oikos Yogurt	55.5	63.3	50.2	83.3	48.7	52.6	43.9	60.2	91.2	95.3	68.8	91.3	59.0*	55.6*	44.2*	73.0*
PepsiCo	Quaker Life, Quaker Oats	18.0	17.1	18.4	42.5	6.1	5.7	7.4	12.8	2.6	2.7	3.9	6.9	14.4	16.4	21.2	36.6
Kellogg Company	Apple/Cinnamon Jacks, Corn Pops, Eggo, Frosted Mini-Wheats, Rice Krispies, Scooby Doo	14.5	14.3	16.6	36.3	54.1	58.5	54.5	65.0	86.4	102.1	93.5	96.3	156.2	178.3	118.9	69.1
General Mills	Kids' cereals: Monsters, Cookie Crisp, Golden Grahams, Reese's Peanut Butter Puffs, Trix	7.0	7.7	3.7	1.4	127.9	124.7	68.2	21.2	116.1	131.0	73.4	18.2	123.5	143.6	76.6	17.1
Unilever	Popsicle	6.8	7.7	3.8	1.3	0.0	0.0	0.0	0.0	6.1	8.2	4.9	1.2	8.4	10.1	5.6	1.2
ConAgra Foods	Kid Cuisine, Peter Pan Peanut Butter, Chef Boyardee	3.4	6.0	4.1	0.9	18.6	26.0	17.7	8.1	47.5	55.9	32.2	16.6	62.6	72.2	40.9	13.7
Campbell Soup Company	Bolthouse Farms	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
General Mills	Kids' yogurts: Yoplait Trix, Yoplait Kid Cup	0.0	0.0	0.0	0.0	38.4	38.6	21.6	6.4	30.2	34.5	19.5	4.9	33.5	39.4	21.1	4.7
The Kraft Heinz Company	Kraft/Polly-O, Kraft Singles	0.0	0.0	0.0	0.0	3.0	2.9	4.3	8.6	16.0	21.6	20.9	18.4	4.5	4.9	6.3	9.9
Post Foods	Honey-Comb	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	44.2	56.8	32.3	7.4
Burger King Corporation	Kids' Meals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	104.6	123.7	65.7	17.3	90.0	111.2	58.2	13.4

*Company had not joined CFBAI

Table B2. TV advertising exposure: CFBAI listed brands on children's TV

		Ads viewed on children's TV															
		2016				2013				2010				2007			
		2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y
Total food, beverage and restaurant companies		1,194.8	1,281.0	656.1	241.9	1,662.3	1,698.9	1,009.9	305.7	1,875.2	2,022.5	1,119.8	308.1	2,117.7	2,348.3	1,248.5	314.9
Total CFBAI companies		724.3	898.0	464.3	159.7	1,204.2	1,324.3	792.1	268.5	1,336.8	1,542.0	853.8	225.3	1,537.0	1,792.1	959.9	229.8
Total CFBAI top-50 listed brands		675.8	838.0	429.4	146.5	840.1	901.7	524.1	153.6	817.1	951.3	520.3	133.4	669.6	802.5	428.5	96.8
Company	Brand																
McDonald's	Happy Meal	131.7	152.0	77.1	28.3	176.0	191.8	112.0	32.4	180.4	209.3	110.6	29.9	87.7	102.9	54.4	13.1
The Kraft Heinz Company	Lunchables	60.1	85.3	45.9	14.1	38.2	47.7	31.3	9.2	22.3	27.7	14.9	3.9	33.0	42.1	22.8	4.9
General Mills	Big G Cereals	52.2	62.0	30.3	10.6	33.6	32.6	18.1	5.6	25.4	27.6	15.4	4.0	10.8	11.3	6.7	1.4
The Kraft Heinz Company	Capri Sun	46.0	62.3	33.0	10.4	37.5	45.7	27.8	7.8	34.2	42.2	23.2	6.0	24.2	31.7	16.6	3.6
General Mills	Yoplait Go-Gurt	45.1	50.0	24.3	8.9	71.4	70.3	39.0	11.7	39.0	44.6	24.8	6.1	46.4	53.8	29.4	6.5
Kellogg Company	Froot Loops	44.5	51.8	26.5	9.4	34.9	40.7	24.1	6.8	42.1	48.0	26.2	6.9	37.6	42.9	22.7	5.5
General Mills	Cinnamon/French Toast Crunch	43.8	51.7	25.5	9.0	85.1	82.9	46.0	14.2	51.1	58.6	32.3	8.2	44.4	52.1	28.3	6.2
General Mills	Betty Crocker Fruit Snacks	38.3	42.7	20.1	7.4	87.7	87.2	48.0	14.5	104.2	118.2	67.4	16.1	69.9	79.0	42.4	9.5
Post Foods	Fruity/Cocoa Pebbles	38.3	49.3	26.8	8.8	36.5	50.6	32.1	8.4	36.5	44.2	23.4	6.2	51.3	68.2	36.1	8.1
General Mills	Lucky Charms	31.0	37.3	18.1	6.4	63.3	61.8	34.1	10.6	46.9	54.1	30.1	7.6	55.4	64.6	34.3	7.7
The Kraft Heinz Company	Kool-Aid	29.6	40.4	21.4	7.0	0.0	0.0	0.0	0.0	20.2	25.8	14.5	3.6	34.3	46.9	25.1	5.3
The Kraft Heinz Company	Kraft Macaroni & Cheese	27.0	39.3	20.5	6.2	0.0	0.0	0.0	0.0	30.5	37.9	19.9	5.1	31.3	41.7	22.2	4.7
Kellogg Company	Frosted Flakes	24.1	29.8	15.7	5.3	18.7	22.5	14.0	3.8	56.6	67.4	37.9	9.2	35.0	37.5	19.3	4.6
General Mills	Cheerios	22.6	27.9	14.1	5.2	60.9	60.9	35.1	10.7	47.7	53.8	30.6	7.6	47.1	55.1	29.3	6.6
General Mills	Cocoa Puffs	21.8	24.8	12.1	4.4	56.8	55.0	30.5	9.4	41.4	46.5	25.8	6.5	16.6	20.4	10.9	2.4
Campbell Soup Company	Pepperidge Farm Goldfish	19.6	31.4	18.0	5.1	39.5	51.9	32.1	8.7	38.7	45.4	23.3	6.6	44.5	52.3	28.0	6.8

Table B2. TV advertising exposure: CFBAI listed brands on children's TV (continued)

		Ads viewed on children's TV															
		2016				2013				2010				2007			
		2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y
Total CFBAI less-advertised listed brands		34.4	42.0	23.7	7.7	217.0	231.9	134.0	38.6	415.4	475.1	257.3	67.0	455.8	543.0	291.4	66.2
Company	Brand																
The Dannon Company	Activia, DanActive, Danimals, Dannon Yogurt, Dannon Dairy Drinks, Light & Fit Yogurt, Light & Fit Yogurt Drinks, Oikos Yogurt	18.0	22.5	13.5	4.4	23.6	29.5	18.6	5.0	61.1	65.8	35.3	9.8	0.0*	0.0*	0.0*	0.0*
General Mills	Kids' cereals: Monsters, Cookie Crisp, Golden Grahams, Reese's Peanut Butter Puffs, Trix	6.9	7.4	3.5	1.4	109.8	107.3	58.9	18.1	115.6	129.5	71.8	18.0	120.2	140.8	75.5	16.7
Unilever	Popsicle	6.4	6.5	2.9	1.1	0.0	0.0	0.0	0.0	6.1	8.2	4.9	1.2	8.4	10.1	5.6	1.2
ConAgra Foods	Kid Cuisine, Peter Pan Peanut Butter, Chef Boyardee	3.0	5.5	3.8	0.8	16.3	23.2	14.6	3.5	40.9	47.7	24.1	6.6	57.5	65.4	34.9	8.2
Campbell Soup Company	Bolthouse Farms	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
General Mills	Kids' yogurts: Yoplait Trix, Yoplait Kid Cup	0.0	0.0	0.0	0.0	38.1	38.1	21.3	6.3	30.1	33.9	19.0	4.8	0.0	0.0	0.0	0.0
Kellogg Company	Apple/Cinnamon Jacks, Corn Pops, Eggo, Frosted Mini-Wheats, Rice Krispies, Scooby Doo	0.0	0.0	0.0	0.0	29.3	33.8	20.6	5.7	50.7	58.3	32.0	8.3	138.7	161.7	87.4	20.3
The Kraft Heinz Company	Kraft/Polly-O, Kraft Singles	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.8	10.3	5.9	1.4	0.0	0.0	0.0	0.0
PepsiCo	Quaker Life, Quaker Oats	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Post Foods	Honey-Comb	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	42.7	55.3	30.5	6.7
Burger King Corporation	Kids' Meals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	103.1	121.4	64.4	17.0	88.3	109.6	57.4	13.2

*Company had not joined CFBAI

Table B3. TV advertising exposure: CFBAI non-listed brands on all TV programming

	Total ads viewed																			
	2016				2013				2010				2007							
	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y				
Total food, beverage and restaurant companies	3,811.3	4,023.4	4,112.3	6,291.1	4,394.6	4,624.5	5,502.3	6,962.0	4,194.4	4,889.4	5,570.3	6,148.9	3,960.7	4,519.1	4,802.9	4,862.6				
Total CFBAI companies	1,984.8	2,218.1	2,145.9	3,094.1	2,652.0	2,792.4	3,067.5	3,661.5	2,645.8	3,153.5	3,298.9	3,347.0	2,786.6	3,219.8	2,982.3	2,691.5				
Total CFBAI top-50 non-listed brands	316.0	338.1	445.0	732.8	337.2	363.1	582.1	818.1	276.3	340.6	531.0	625.6	296.3	346.5	367.4	323.5				
Company	Brand																			
Burger King Corporation	Other (incl. Big Kids Meal)				93.6	101.0	139.1	235.1	50.8	54.0	96.0	147.1	62.0	74.7	142.4	161.6	46.6	61.1	100.8	101.9
McDonald's	Other (including Mighty Kids Meal)				44.4	45.6	54.2	101.2	75.7	83.2	123.4	179.5	76.3	91.0	127.7	151.6	139.0	152.2	153.3	132.5
The Hershey Company	Hershey's				39.4	38.3	50.9	91.0	104.3	108.7	170.9	250.8	54.4	69.1	95.7	120.0	11.0	14.0	21.2	23.9
The Hershey Company	Reese's				32.1	33.2	45.9	77.8	39.6	43.4	71.9	97.7	34.8	44.4	69.4	80.4	7.2	8.9	15.3	17.5
Kellogg Company	Pop Tarts				23.8	31.8	40.6	42.4	20.4	23.4	38.8	34.4	6.7	7.5	11.5	18.0	75.8	87.7	46.3	12.0
General Mills	Yoplait Yogurt				23.6	25.1	30.1	51.2	8.3	9.5	12.3	16.5	10.0	11.6	16.8	26.0	5.8	8.8	14.0	12.8
The Hershey Company	Kit Kat				20.2	20.5	29.2	49.0	21.6	23.4	39.5	53.6	21.4	28.1	45.2	46.5	0.0	0.0	0.0	0.0
The Coca-Cola Company	Coca Cola				19.7	22.3	27.6	40.1	5.7	6.0	8.9	13.3	8.5	11.1	17.7	16.3	7.0	8.0	9.5	14.2
PepsiCo	Lay's Potato Chips				19.2	20.3	27.5	44.8	10.8	11.4	20.3	25.2	2.1	3.0	4.5	5.3	3.9	5.7	7.0	8.5
Total CFBAI all other non-listed brands	718.2	729.4	929.0	1,710.8	946.6	965.6	1,416.3	2,095.6	895.1	1,078.5	1,599.4	2,035.2	1,111.9	1,252.9	1,588.6	1,838.9				
Company	Brand																			
PepsiCo	All other brands				126.2	134.5	182.8	300.0	97.0	105.9	179.9	244.1	55.1	70.2	125.4	146.5	154.5	181.8	215.5	208.1
Mars	All other brands				84.3	89.1	131.0	215.2	82.3	88.9	169.3	193.7	90.7	119.2	219.8	213.5	101.9	137.3	234.7	204.0
Nestle USA	All brands				76.6	78.2	98.5	183.4	131.1	99.2	138.5	209.7	114.5	122.3	188.0	221.0	142.3*	131.9*	162.0*	189.3*
The Kraft Heinz Company	All other brands				64.2	62.8	71.8	144.6	62.0	62.9	100.2	172.7	47.8	57.8	85.8	123.9	56.9	63.1	85.9	136.3
General Mills	All other brands				63.1	66.1	73.7	138.8	178.7	187.1	236.4	362.4	165.4	206.9	285.7	387.1	108.2	127.3	180.5	219.5
Mondelez Global	All brands				50.7	48.2	60.1	120.4	67.8	84.7	113.9	120.2	76.8*	105.5*	176.2*	161.2*	120.4*	151.0*	199.6*	180.4*
The Hershey Company	All other brands				50.4	49.0	67.2	117.2	92.3	97.3	156.0	222.4	46.6	58.9	84.0	101.4	0.0	0.0	0.0	0.0
Unilever	All other brands				42.9	41.0	51.2	107.4	27.2	27.2	37.6	62.6	15.7	17.6	26.3	42.7	19.2	16.7	20.9	41.1
The Coca-Cola Company	All other brands				33.2	34.4	45.3	79.0	19.4	19.4	33.5	52.5	21.1	25.0	41.5	53.5	22.3	29.5	52.2	57.2
Kellogg Company	All other brands				31.7	31.5	36.0	78.8	79.5	83.2	109.2	184.0	69.9	79.5	103.4	173.2	162.4	176.9	159.6	187.7
ConAgra Foods	All other brands				25.2	25.4	29.4	60.6	24.8	26.3	37.0	66.4	31.6	38.9	52.3	82.7	43.7	47.3	57.9	90.4
Campbell Soup Company	All other brands				24.6	23.3	28.2	63.5	41.8	39.8	53.3	117.6	97.5	114.1	139.3	234.0	158.7	167.3	182.8	273.6
Post Foods	All other brands				23.7	24.6	29.1	54.5	19.8	17.3	22.1	52.6	13.0	15.0	19.3	34.5	12.3	12.3	18.0	30.2
Ferrero USA	All brands				21.4	21.5	24.8	47.4	15.9	16.2	22.7	33.1	16.7	19.9	30.9	37.4	9.2	10.6	19.0	21.2
The Dannon Company	All other brands				0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	22.4	14.6	11.8	20.3	0.0*	0.0*	0.0*	0.0*
American Licorice Company	All brands				0.0	0.0	0.0	0.0	6.9*	10.2*	6.8*	1.6*	10.2*	13.2*	9.6*	2.3*	0.0*	0.0*	0.0*	0.0*

*Company had not joined CFBAI

Table B4. TV advertising exposure: CFBAI non-listed brands on children's TV

		Ads viewed on children's TV															
		2016				2013				2010				2007			
		2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y
Total food, beverage and restaurant companies		1,194.8	1,281.0	656.1	241.9	1,662.3	1,698.9	1,009.9	305.7	1,875.2	2,022.5	1,119.8	308.1	2,117.7	2,348.3	1,248.5	314.9
Total CFBAI companies		724.3	898.0	464.3	159.7	1,204.2	1,324.3	792.1	268.5	1,336.8	1,542.0	853.8	225.3	1,537.0	1,792.1	959.9	229.8
Total CFBAI top-50 non-listed brands		5.9	8.0	4.8	2.5	13.6	16.6	13.0	42.0	28.9	34.4	20.3	5.7	123.6	145.0	80.9	26.9
Company	Brand																
McDonald's	Other (including Mighty Kids Meal)	3.6	3.9	2.0	0.8	10.7	12.5	8.4	40.5	17.0	18.2	10.1	3.3	11.4	13.0	11.6	10.7
Kellogg Company	Pop Tarts	1.4	2.5	1.8	1.2	1.7	2.0	2.3	0.7	0.0	0.1	0.1	0.0	70.6	82.4	43.0	10.3
The Coca-Cola Company	Coca Cola	0.5	0.9	0.7	0.4	0.0	0.0	0.0	0.0	0.1	0.2	0.5	0.1	0.0	0.0	0.0	0.0
General Mills	Yoplait Yogurt	0.4	0.5	0.2	0.1	0.8	1.4	1.6	0.5	11.0	14.4	8.3	2.1	32.4	38.5	20.7	4.5
The Hershey Company	Hershey's	0.0	0.0	0.0	0.0	0.2	0.3	0.2	0.1	0.1	0.3	0.3	0.1	0.0	0.0	0.0	0.0
PepsiCo	Lay's Potato Chips	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Burger King Corporation	Other (incl. Big Kids Meal)	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.4	0.9	0.7	0.1	9.3	11.2	5.7	1.4
The Hershey Company	Kit Kat	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.2	0.0	0.0	0.0	0.0	0.0
The Hershey Company	Reese's	0.0	0.0	0.0	0.0	0.2	0.3	0.3	0.1	0.1	0.2	0.2	0.1	0.0	0.0	0.0	0.0
Total CFBAI all other non-listed brands		7.6	9.0	5.6	2.5	109.2	141.0	99.8	29.2	63.4	66.1	44.6	16.8	181.6	203.5	106.0	26.3
Company	Brand																
PepsiCo	All other brands	5.5	4.8	2.2	0.9	1.0	1.9	2.2	0.6	1.2	1.7	1.6	0.3	26.3	28.2	13.2	3.6
Mondelez Global	All brands	1.1	2.3	1.9	0.8	19.3	29.9	20.6	4.8	2.9*	4.2*	4.7*	0.9*	45.4*	62.2*	34.5*	7.1*
General Mills	All other brands	0.6	1.1	0.9	0.5	23.1	23.8	16.8	5.4	0.5	1.4	3.2	0.6	3.5	2.6	1.4	0.4
The Kraft Heinz Company	All other brands	0.2	0.4	0.4	0.2	0.0	0.1	0.1	0.0	13.5	23.3	14.1	8.4	0.6	0.8	0.5	0.1
Post Foods	All other brands	0.2	0.3	0.2	0.1	0.2	0.3	0.2	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Unilever	All other brands	0.1	0.0	0.0	0.0	3.6	4.1	2.2	0.6	1.1	0.3	0.2	0.1	2.8	0.5	0.2	0.2
ConAgra Foods	All other brands	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.0	1.7	1.8	1.1	0.3	8.3	9.2	4.5	1.1
The Coca-Cola Company	All other brands	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.4	0.1	0.0	0.0	0.1	0.0
American Licorice Company	All brands	0.0	0.0	0.0	0.0	5.6*	8.4*	5.3*	1.1*	9.1*	10.8*	6.2*	1.4*	0.0*	0.0*	0.0*	0.0*
Ferrero USA	All brands	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Nestle USA	All brands	0.0	0.0	0.0	0.0	52.6	68.1	47.5	15.0	22.7	7.0	4.6	2.3	60.4*	35.1*	18.0*	6.3*
Campbell Soup Company	All other brands	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	12.5	18.0	10.0	2.6	48.7	55.3	29.1	7.4
The Dannon Company	All other brands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0*	0.0*	0.0*	0.0*
The Hershey Company	All other brands	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.4	0.5	0.4	0.1	0.0	0.0	0.0	0.0
Kellogg Company	All other brands	0.0	0.0	0.0	0.0	7.1	8.8	5.3	1.3	9.1	10.4	6.0	1.6	76.9	86.7	45.2	11.1
Mars	All other brands	0.0	0.0	0.0	0.0	2.0	3.6	4.6	1.3	0.3	1.2	3.0	0.3	14.4	20.1	11.7	2.5

*Company had not joined CFBAI

Table B5. TV advertising exposure: CCAI companies and non-participating companies with healthy brands on all TV programming

	Total ads viewed															
	2016				2013				2010				2007			
	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y
Total food, beverage and restaurant companies	3,811.3	4,023.4	4,112.3	6,291.1	4,394.6	4,624.5	5,502.3	6,962.0	4,194.4	4,889.4	5,570.3	6,148.9	3,960.7	4,519.1	4,802.9	4,862.6
Total CCAI and non-participating companies with healthy brands	117.7	115.7	116.1	197.7	70.5	64.6	86.1	155.3	44.3	52.8	68.7	111.0	21.7	19.8	29.7	60.8
Total CCAI companies	5.0	4.3	5.0	10.9	9.9	10.3	13.4	20.0	5.5	5.5	7.4	14.0	3.0	2.1	3.4	9.0
Company																
Ghirardelli Chocolate	3.3	2.7	3.4	8.0	5.5	4.8	6.7	15.4	5.4	5.4	7.3	14.0	2.9	2.0	3.3	8.6
Jelly Belly Candy Company	1.7	1.6	1.6	2.9	0.3	0.2	0.3	0.6	0.1	0.1	0.1	0.0	0.1	0.1	0.1	0.4
Brown & Haley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ferrara Candy Company	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Just Born Quality Confections	0.0	0.0	0.0	0.0	4.1	5.3	6.4	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
R.M. Palmer Company	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Promotion in Motion Companies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wolfgang Candy Company	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total non-participating companies with healthy brands	112.7	111.4	111.1	186.9	60.6	54.3	72.7	135.3	38.7	47.3	61.4	97.0	18.7	17.6	26.3	51.8
Company	Brand															
MilkPEP	MilkPEP	15.9	13.8	12.3	20.1	12.1	7.5	9.7	17.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Wonderful Company	Wonderful Halos	15.2	14.2	10.4	15.3	1.9	1.6	1.8	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WhiteWave Foods Co	All other brands	11.7	10.8	11.6	12.3	6.1	5.5	8.1	17.0	10.7	12.9	16.9	24.7	5.7	5.4	8.2
Dole Food Company	Dole Fruitocracy	11.4	15.5	9.5	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Wonderful Company	All other brands	11.2	11.2	14.3	29.5	4.2	3.2	4.4	11.9	14.7	18.3	23.7	34.3	5.1	5.0	7.5
Chobani	Chobani	8.5	8.1	10.6	20.5	2.4	2.6	3.5	6.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Wonderful Company	POM Wonderful	8.4	8.1	9.5	22.7	0.0	0.0	0.0	0.0	1.4	1.5	2.1	5.0	0.0	0.0	0.0
Birds Eye	Birds Eye Frozen Vegetables/Entree	7.4	5.0	5.1	10.5	7.9	6.8	7.7	14.0	1.5	2.0	2.8	4.0	2.8	2.2	3.2
WhiteWave Foods Co	Silk	7.1	6.7	7.6	16.8	14.1	13.8	19.3	36.9	7.0	9.0	11.0	19.0	5.1	5.0	7.5
The Wonderful Company	Wonderful Pistachios & Almonds	6.4	6.5	7.5	16.9	8.1	8.9	13.1	23.0	3.1	3.3	4.4	9.0	0.0	0.0	0.0
Dole Food Company	Dole Fruit Bowls	4.3	5.2	4.8	8.0	3.9	4.3	5.0	7.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Wonderful Company	Fiji Water	2.8	3.1	4.8	6.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dole Food Company	All other brands	2.4	3.2	3.2	4.1	0.0	0.0	0.0	0.0	0.3	0.3	0.5	1.0	0.0	0.0	0.0

Table B6. TV advertising exposure: CCAI companies and non-participating companies with healthy brands on children's TV

	Ads viewed on children's TV															
	2016				2013				2010				2007			
	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y
Total food, beverage and restaurant companies	1,194.8	1,281.0	656.1	241.9	1,662.3	1,698.9	1,009.9	305.7	1,875.2	2,022.5	1,119.8	308.1	2,117.7	2,348.3	1,248.5	314.9
Total CCAI and non-participating companies with healthy brands	25.1	21.8	13.3	2.4	11.9	6.1	2.7	1.1	2.3	6.3	4.5	0.8	0.6	2.0	7.2	0.7
Total CCAI companies	0.0	0.0	0.0	0.0	1.3	1.5	0.7	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Company																
Brown & Haley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ferrara Candy Company	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ghirardelli Chocolate	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Jelly Belly Candy Company	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Just Born Quality Confections	0.0	0.0	0.0	0.0	1.3	1.5	0.7	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
R.M. Palmer Company	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Promotion in Motion Companies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wolfgang Candy Company	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total non-participating companies with healthy brands	25.1	21.8	13.3	2.4	10.6	4.6	1.9	1.0	2.3	6.3	4.5	0.8	0.6	2.0	7.2	0.7
Company	Brand															
Dole Food Company	Dole Fruitocracy	9.7	12.7	7.4	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WhiteWave Foods Co	Silk	6.4	6.0	3.3	0.0	0.0	0.0	0.0	2.3	6.3	4.5	0.8	0.6	2.0	7.2	0.7
The Wonderful Company	Wonderful Halos	4.7	1.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MilkPEP	MilkPEP	1.9	0.4	0.1	0.0	5.8	0.9	0.1	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Birds Eye	Birds Eye Frozen Vegetables/Entrees	1.7	0.5	0.2	0.2	4.8	3.7	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Wonderful Company	All other brands	0.8	1.2	1.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chobani	Chobani	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dole Food Company	Dole Fruit Bowls	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dole Food Company	All other brands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
WhiteWave Foods Co	All other brands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Wonderful Company	Fiji Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Wonderful Company	POM Wonderful	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
The Wonderful Company	Wonderful Pistachios & Almonds	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Table B7. TV advertising exposure: non-participating companies on all TV programming

		Total ads viewed															
		2016				2013				2010				2007			
		2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y
Total food, beverage and restaurant companies		3,811.3	4,023.4	4,112.3	6,291.1	4,394.6	4,624.5	5,502.3	6,962.0	4,194.4	4,889.4	5,570.3	6,148.9	3,960.7	4,519.1	4,802.9	4,862.6
Total other top brands from non-participating companies		1,126.9	1,167.3	1,272.0	1,892.7	1,075.2	1,172.6	1,521.3	1,916.2	854.3	976.7	1,284.6	1,482.0	677.5	798.3	1,091.0	1,138.2
Total non-participating companies with top-50 child-directed brands		527.6	531.0	466.1	539.7	523.2	564.9	592.2	580.7	435.6	471.8	469.9	417.9	354.0	399.4	419.9	330.2
Company	Brand																
Chuck E. Cheese's		147.1	108.6	58.5	33.3	200.8	184.7	112.9	36.2	213.3	200.2	107.2	33.2	176.8	169.4	86.1	25.2
Wendy's	All other	67.9	73.5	92.1	144.9	70.4	80.7	119.4	149.8	49.0	59.1	106.1	118.3	35.4	48.8	91.6	88.6
Sonic	All other	59.6	65.5	82.9	127.8	43.6	50.4	84.3	109.2	16.4	21.9	39.8	42.3	24.4	32.4	63.1	64.4
Subway	All other	56.7	64.0	82.9	129.1	92.9	106.9	159.8	213.9	82.6	105.3	143.7	164.2	39.2	52.4	100.3	102.3
TOPPS	Juicy Drop Candy	37.0	47.6	26.0	8.8	23.9	29.0	18.0	5.1	9.1	10.0	5.3	1.5	6.0	7.7	4.1	1.0
TOPPS	All other brands	25.2	35.2	19.7	5.9	39.3	47.3	28.8	7.9	16.5	18.3	10.1	2.8	23.2	31.1	18.1	3.9
Dave & Busters		20.8	24.0	21.8	26.4	6.9	7.0	14.2	19.2	7.7	9.1	18.5	23.0	4.2	5.4	14.0	14.6
Perfetti Van Melle	Air Heads	17.4	22.7	17.7	10.5	9.4	14.4	16.1	7.7	19.9	25.1	14.7	3.8	28.3	32.1	17.6	5.4
TOPPS	Crunchkins	17.4	21.8	13.3	5.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fromageries Bel SA	Laughing Cow	16.5	8.1	5.9	9.1	4.0	4.1	5.1	9.3	3.0	3.1	4.8	8.8	0.0	0.0	0.0	0.0
TOPPS	Ring Pop	15.8	20.0	11.1	3.8	11.2	13.3	8.3	2.4	10.3	11.4	6.2	1.8	5.8	7.8	4.1	1.0
Fromageries Bel SA	Mini Babybel	15.1	7.6	5.7	9.2	3.8	4.1	5.2	8.9	2.3	2.3	3.8	6.7	1.8	1.8	2.0	4.3
Subway	Kids' meals	11.8	16.4	9.2	2.5	2.8	5.0	4.1	2.4	1.3	1.3	0.6	0.2	8.7	10.5	19.0	19.4
Fromageries Bel SA	Laughing Cow Cheese Dippers Snacks	10.6	5.3	4.0	6.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Perfetti Van Melle	Mentos	7.9	9.8	14.9	15.8	3.9	4.9	8.0	6.2	4.2	4.7	9.0	11.3	0.0	0.0	0.0	0.0
Sonic	Kids' meals	0.8	0.8	0.3	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wendy's	Kids' meals	0.0	0.0	0.0	0.0	10.2	13.1	8.0	2.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Perfetti Van Melle	All other brands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fromageries Bel SA	All other brands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Table B7. TV advertising exposure: non-participating companies on all TV programming (continued)

	Total ads viewed															
	2016				2013				2010				2007			
	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y
Total non-participating top-50 fast food restaurants	414.8	441.2	577.4	937.4	352.7	392.1	616.8	838.8	248.8	308.0	528.4	623.3	207.8	265.3	461.6	490.3
Domino's Pizza	73.5	78.9	97.2	157.3	62.3	75.5	99.1	118.8	48.7	67.6	101.0	99.2	24.0	29.7	57.9	63.8
Taco Bell	69.1	74.8	110.3	171.0	65.2	71.1	134.5	174.2	50.6	60.9	121.9	132.4	40.6	57.7	114.9	113.2
Little Caesars	54.2	58.4	72.6	126.1	33.7	36.4	55.7	80.6	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Pizza Hut	53.2	57.9	75.8	114.4	60.9	66.3	111.2	152.9	50.5	59.1	104.0	136.8	50.3	57.3	75.3	81.5
KFC	36.7	38.0	52.0	90.6	41.3	44.0	72.3	113.5	40.2	47.5	81.6	107.1	53.6	67.3	112.5	132.1
Arby's	34.7	37.9	52.4	71.9	12.7	13.8	21.5	29.5	13.7	16.5	27.6	30.7	11.5	15.1	30.1	26.4
Dairy Queen	34.2	34.9	42.8	83.2	24.7	28.6	43.2	61.0	19.7	25.5	41.5	50.1	15.5	23.1	42.1	38.4
Popeye's	29.9	34.0	41.3	62.2	22.9	28.2	42.9	47.5	10.5	14.0	21.4	23.9	1.6	2.4	4.6	3.9
Papa John's	29.4	26.5	33.0	60.8	29.1	28.3	36.3	60.7	14.9	16.7	29.5	43.0	10.6	12.6	24.1	31.1
Total non-participating top-50 casual restaurants	184.5	195.1	228.5	415.5	199.3	215.6	312.3	496.7	169.9	196.9	286.4	440.8	115.7	133.6	209.5	317.8
Olive Garden	40.2	40.2	46.2	88.6	40.9	41.7	64.1	100.8	41.9	41.8	57.5	85.9	28.2	33.2	52.8	73.6
Applebee's	36.1	39.8	47.8	85.7	42.7	48.6	66.3	99.3	26.7	32.5	48.8	73.4	24.9	28.2	39.4	69.7
Chili's Grill & Bar	23.7	26.5	34.3	55.4	23.4	25.1	39.3	60.9	23.6	29.6	45.6	58.0	14.2	19.5	36.2	35.3
Red Lobster	22.3	21.2	24.1	55.3	29.1	30.5	44.3	81.8	26.2	30.4	43.6	75.0	26.1	26.5	40.7	73.3
Outback Steakhouse	21.6	23.0	25.9	48.5	21.5	22.9	34.1	55.6	18.3	21.6	32.5	54.7	6.7	7.3	10.8	23.0
Denny's Restaurant	20.7	24.4	28.9	37.8	17.9	18.0	27.3	40.8	14.6	17.5	26.0	42.1	15.6	18.9	29.5	42.9
Golden Corral Restaurant	19.9	20.1	21.4	44.2	23.9	28.8	36.8	57.6	18.5	23.5	32.5	51.6	0.0	0.0	0.0	0.0

Table B8. TV advertising exposure: non-participating companies on children's TV

		Ads viewed on children's TV															
		2016				2013				2010				2007			
		2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y
Total food, beverage and restaurant companies		1,194.8	1,281.0	656.1	241.9	1,662.3	1,698.9	1,009.9	305.7	1,875.2	2,022.5	1,119.8	308.1	2,117.7	2,348.3	1,248.5	314.9
Total other top brands from non-participating companies		294.2	272.5	142.4	55.0	305.3	326.0	201.9	57.2	295.8	295.5	160.1	51.3	224.3	223.1	112.8	29.9
Total non-participating companies with top-50 child-directed brands		290.3	270.3	141.5	54.6	290.7	306.2	189.1	53.9	279.9	282.3	150.9	45.6	204.4	201.5	102.6	27.4
Company	Brand																
Chuck E. Cheese's		129.7	94.7	48.4	22.6	188.2	173.3	106.6	33.1	204.4	190.7	101.5	31.1	168.8	161.4	81.4	22.4
TOPPS	Juicy Drop Candy	32.5	41.0	21.7	7.3	21.9	26.8	16.5	4.5	8.6	9.4	4.9	1.3	5.7	7.4	3.8	0.9
TOPPS	All other brands	18.7	26.0	14.1	4.2	36.3	43.4	26.1	6.9	15.5	17.1	9.3	2.4	0.0	0.0	0.0	0.0
TOPPS	Ring Pop	15.6	20.1	11.0	3.7	10.7	12.8	8.0	2.2	9.6	10.5	5.6	1.7	5.6	7.4	3.6	0.8
TOPPS	Crunchkins	15.5	19.0	10.1	3.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fromageries Bel SA	Laughing Cow	11.7	3.9	1.7	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dave & Busters		11.3	13.3	6.7	2.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subway	Kids' meals	11.2	15.7	8.8	2.3	1.8	3.7	2.6	0.4	1.3	1.3	0.6	0.2	1.4	0.6	0.3	0.2
Perfetti Van Melle	Air Heads	11.1	13.8	7.4	2.4	3.4	5.6	4.0	0.7	17.9	21.7	11.3	3.5	21.5	23.9	12.6	3.0
Fromageries Bel SA	Mini Babybel	10.5	3.8	1.6	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wendy's	All other	8.2	9.8	5.4	1.9	11.9	17.0	11.0	2.9	0.1	0.2	0.2	0.1	0.0	0.1	0.2	0.0
Fromageries Bel SA	Laughing Cow Cheese Dippers Snacks	7.0	2.2	0.8	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sonic	All other	5.6	5.0	2.6	1.5	0.1	0.0	0.1	0.0	0.1	0.2	0.1	0.2	0.0	0.0	0.1	0.0
Subway	All other	0.9	1.3	0.8	0.2	11.6	16.8	10.4	2.3	22.4	31.1	17.2	5.2	1.3	0.7	0.7	0.2
Sonic	Kids' meals	0.8	0.8	0.3	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wendy's	Kids' meals	0.0	0.0	0.0	0.0	4.8	6.6	3.7	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Perfetti Van Melle	Mentos	0.0	0.0	0.0	0.0	0.1	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Perfetti Van Melle	All other brands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fromageries Bel SA	All other brands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Table B8. TV advertising exposure: non-participating companies on children's TV (continued)

	Ads viewed on children's TV															
	2016				2013				2010				2007			
	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y	2-5 y	6-11 y	12-14 y	18-49 y
Total non-participating top-50 fast food restaurants	3.1	1.1	0.4	0.3	14.3	19.3	12.3	3.2	5.8	7.8	4.8	3.4	19.9	21.5	10.2	2.5
Papa John's	3.1	0.9	0.3	0.3	5.9	5.4	2.8	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pizza Hut	0.1	0.1	0.0	0.0	0.1	0.1	0.2	0.1	0.0	0.0	0.0	0.0	19.8	21.5	10.2	2.5
Domino's Pizza	0.0	0.1	0.0	0.0	7.9	13.1	8.3	1.9	5.5	7.0	4.1	3.1	0.0	0.0	0.0	0.0
Taco Bell	0.0	0.0	0.0	0.0	0.1	0.1	0.2	0.1	0.1	0.1	0.2	0.1	0.0	0.0	0.0	0.0
Arby's	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Dairy Queen	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.1	0.2	0.4	0.3	0.2	0.0	0.0	0.0	0.0
Little Caesars	0.0	0.0	0.0	0.0	0.1	0.1	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Popeye's	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0
KFC	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Total non-participating top-50 casual restaurants	0.8	1.1	0.5	0.2	0.3	0.5	0.4	0.1	10.1	5.4	4.5	2.2	0.0	0.0	0.0	0.0
Denny's Restaurant	0.7	1.1	0.5	0.2	0.0	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Applebee's	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.4	1.0	1.4	0.4	0.0	0.0	0.0	0.0
Outback Steakhouse	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.1	0.1	0.0	0.0	0.0	0.0
Chili's Grill & Bar	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Olive Garden	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	9.1	3.2	1.7	0.9	0.0	0.0	0.0	0.0
Golden Corral Restaurant	0.0	0.0	0.0	0.0	0.1	0.2	0.1	0.0	0.3	0.7	0.9	0.6	0.0	0.0	0.0	0.0
Red Lobster	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.4	0.3	0.3	0.0	0.0	0.0	0.0

Appendix Table C

Table C1. NPI scores and nutrient content: CFBAI listed products

Top-50 brands		# of products	Serving size (g)		Total calories (kcal)		Total fat (g)		Sat fat (g)		Protein (g)		Total carbohydrate (g)		Total sugar (g)		Dietary fiber (g)		NPI score	
Company	Brand		Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range
Campbell Soup Company	Pepperidge Farm Goldfish	17	26.5 (18-30)	140 (120-140)	5 (2-5)	1 (0-1.5)	3 (1-4)	20 (20-20)	1 (0-10)	1 (0-2)	40 (12-48)									
General Mills	Betty Crocker Fruit Snacks	22	21 (10-25)	80 (40-90)	1 (0-2)	0.5 (0-0.5)	0 (0-0)	17 (9-20)	10 (5-10)	0 (0-0)	34 (30-42)									
General Mills	Cheerios (regular and Honey Nut, Cinnamon and French Toast Crunch)	2	28 (28-28)	105 (100-110)	1.75 (2-2)	0.25 (0-0.5)	2.5 (2-3)	21 (20-22)	5 (1-9)	2.5 (2-3)	58 (46-70)									
General Mills	Cocoa Puffs	1	27 (27-27)	100 (100-100)	1.5 (2-2)	0 (0-0)	1 (1-1)	23 (23-23)	9 (9-9)	1 (1-1)	48 (48-48)									
General Mills	Lucky Charms	2	27.5 (27-28)	110 (110-110)	1.25 (1-2)	0 (0-0)	1.5 (1-2)	23 (22-24)	10 (10-10)	2 (2-2)	45 (42-48)									
General Mills	Yoplait Go-Gurt	10	64 (56-64)	60 (50-60)	0.5 (1-1)	0 (0-0)	2 (2-2)	12 (10-12)	9 (8-9)	0 (0-0)	64 (64-66)									
Kellogg Company	Froot Loops (regular and Froot Loops Bloopers)	2	28.5 (28-29)	110 (110-110)	1 (1-1)	0.5 (0.5-0.5)	1.5 (1-2)	25 (25-25)	10 (10-10)	3 (3-3)	46 (46-46)									
Kellogg Company	Frosted Flakes (regular and Cinnamon Frosted Flakes)	2	29 (29-29)	110 (110-110)	0 (0-0)	0 (0-0)	1 (1-1)	26 (26-26)	10 (10-10)	0.3 (0-0.6)	40 (38-42)									
The Kraft Heinz Company	Capri Sun (100% juice or diluted fruit juice)	11	177 (177-177)	70 (70-90)	0 (0-0)	0 (0-0)	0 (0-0)	19 (16-22)	17 (14-21)	0 (0-0)	70 (68-76)									
The Kraft Heinz Company	Capri Sun (Roarin' Waters)	6	177 (177-177)	30 (30-30)	0 (0-0)	0 (0-0)	0 (0-0)	8 (8-8)	8 (8-8)	0 (0-0)	68 (68-68)									
The Kraft Heinz Company	Kool-Aid (low calorie beverage)	33	237 (177-237)	30 (0-40)	0 (0-0)	0 (0-0)	0 (0-0)	7 (0-11)	7 (0-11)	0 (0-0)	70 (68-70)									
The Kraft Heinz Company	Kraft macaroni & cheese	23	264 (159-264)	280 (210-290)	5 (3-7)	2 (1-3)	10 (6-13)	48 (39-52)	8 (3-9)	2 (0.6-5)	68 (64-70)									
The Kraft Heinz Company	Lunchables (with 100% juice)	4	282 (267-296)	380 (360-430)	11.5 (8-13)	4.25 (4-4.5)	11 (10-13)	60 (50-69)	36 (24-37)	1.3 (0-3)	67 (64-68)									
Post Foods	Pebbles	3	29 (27-30)	120 (110-120)	1 (1-1)	1 (0-1)	1 (1-1)	25 (23-26)	10 (9-10)	0 (0-0)	30 (28-36)									

Table C1. NPI scores and nutrient content: CFBAI listed products (continued)

Less-advertised brands		# of products	Serving size (g)		Total calories (kcal)		Total fat (g)		Sat fat (g)		Protein (g)		Total carbohydrate (g)		Total sugar (g)		Dietary fiber (g)		NPI score	
Company	Brand		Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range
Campbell Soup Company	Bolthouse Farms	1	64 (64-64)	25 (25-25)	0 (0-0)	0 (0-0)	1 (1-1)	6 (6-6)	4 (4-4)	2 (2-2)	78 (78-78)									
ConAgra Foods	Chef Boyardee pasta	11	239 (205-255)	170 (150-200)	2 (1-5)	0.5 (0-2)	7 (5-8)	31 (25-37)	7 (6-11)	3 (3-5)	72 (70-76)									
ConAgra Foods	Kid Cuisine	9	245 (198-301)	410 (330-440)	11 (7-19)	3.5 (1.5-4.5)	13 (12-14)	55 (46-62)	9 (5-16)	6 (4-7)	72 (68-74)									
ConAgra Foods	Peter Pan Peanut Butter	9	32 (24-36)	210 (150-210)	17 (12-17)	3 (2-3.5)	8 (6-8)	6 (5-14)	3 (2-4)	2 (2-2)	56 (54-66)									
The Dannon Company	Co Activia	21	113 (113-113)	90 (60-120)	1.5 (0-2)	1 (0-1)	4 (4-12)	16 (8-19)	13 (6-17)	0 (0-3)	72 (68-78)									
The Dannon Company	DanActive	3	93 (93-93)	70 (70-70)	1 (1-1)	0.5 (0.5-0.5)	3 (3-3)	14 (11-14)	13 (11-13)	0 (0-0)	68 (68-70)									
The Dannon Company	Danimals	16	96 (93-113)	75 (60-80)	0.5 (0-1)	0 (0-1)	3 (2-4)	14 (10-16)	12 (10-14)	0 (0-0)	68 (66-70)									
The Dannon Company	Dannon Yogurt	2	169 (113-225)	100 (80-120)	0 (0-0)	0 (0-0)	7 (4-10)	16.5 (15-18)	13.5 (12-15)	0 (0-0)	71 (70-72)									
The Dannon Company	Light & Fit Yogurt	35	150 (150-255)	80 (70-120)	0 (0-0)	0 (0-0)	12 (5-22)	9 (8-13)	7 (6-9)	0 (0-0)	76 (72-80)									
The Dannon Company	Oikos Yogurt	17	150 (150-150)	120 (80-120)	0 (0-0)	0 (0-0)	15 (12-15)	14 (6-16)	6 (6-14)	6 (0-6)	88 (74-88)									
General Mills	Cookie Crisp	1	26 (26-26)	100 (100-100)	1 (1-1)	0 (0-0)	1 (1-1)	22 (22-22)	9 (9-9)	1 (1-1)	46 (46-46)									
General Mills	Golden Grahams	1	31 (31-31)	120 (120-120)	1 (1-1)	0 (0-0)	2 (2-2)	26 (26-26)	9 (9-9)	2 (2-2)	44 (44-44)									
General Mills	Monsters cereals (Boo Berry, Franken Berry, Count Chocula)	3	33 (27-33)	130 (100-130)	1.75 (2-2)	0 (0-0)	2 (1-2)	28 (23-28)	9 (9-9)	1 (1-1)	46 (46-46)									
General Mills	Reese's Peanut Butter Puffs	1	29 (29-29)	120 (120-120)	3 (3-3)	0.5 (0.5-0.5)	2 (2-2)	22 (22-22)	9 (9-9)	1 (1-1)	38 (38-38)									
General Mills	Trix	1	32 (32-32)	130 (130-130)	1.75 (2-2)	0 (0-0)	1 (1-1)	27 (27-27)	10 (10-10)	1 (1-1)	42 (42-42)									
General Mills	Yoplait Kid Cup	9	113 (85-113)	100 (70-100)	1 (1-3)	0 (0-1.5)	3 (3-3)	20 (12-20)	13 (8-13)	0 (0-0)	66 (66-68)									
General Mills	Yoplait Trix	2	113 (113-113)	100 (100-100)	1 (1-1)	0.5 (0.5-0.5)	3 (3-3)	20 (20-20)	13 (13-13)	0 (0-0)	66 (66-66)									
Kellogg Company	Apple Jacks	1	29 (29-29)	110 (110-110)	1 (1-1)	0.5 (0.5-0.5)	2 (2-2)	25 (25-25)	10 (10-10)	3 (3-3)	46 (46-46)									
Kellogg Company	Corn Pops	1	30 (30-30)	120 (120-120)	0 (0-0)	0 (0-0)	1 (1-1)	27 (27-27)	9 (9-9)	0 (0-0)	44 (44-44)									
Kellogg Company	Eggo Waffles and Bites	2	59 (48-70)	160 (140-180)	4.75 (4-6)	1.25 (1-1.5)	3 (2-4)	25.5 (24-27)	6 (2-10)	0.59 (0.6-0.6)	51 (46-56)									

Table C1. NPI scores and nutrient content: CFBAI listed products (continued)

Less-advertised brands		# of products	Serving size (g)		Total calories (kcal)		Total fat (g)		Sat fat (g)		Protein (g)		Total carbohydrate (g)		Total sugar (g)		Dietary fiber (g)		NPI score	
Company	Brand		Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range
Kellogg Company	Frosted Mini-Wheats (Unfrosted Bite Size Original)	1	54 (54-54)	190 (190-190)	1 (1-1)	0 (0-0)	5 (5-5)	46 (46-46)	11 (11-11)	6 (6-6)	74 (74-74)									
Kellogg Company	Rice Krispies (regular)	1	33 (33-33)	130 (130-130)	0 (0-0)	0 (0-0)	2 (2-2)	29 (29-29)	4 (4-4)	0 (0-0)	46 (46-46)									
The Kraft Heinz Company	Kraft Singles	10	19 (19-21)	60 (45-60)	4 (3-5)	2.5 (1.5-2.5)	4 (3-4)	2 (2-2)	2 (1-2)	0 (0-0)	22 (20-28)									
The Kraft Heinz Company	Kraft/Polly-O	6	21 (21-28)	60 (50-70)	3.75 (3-5)	2.25 (2-2.5)	6 (5-8)	0 (0-1)	0 (0-1)	0 (0-0)	34 (30-34)									
PepsiCo	Quaker Instant Oatmeal	1	28 (28-28)	100 (100-100)	2 (2-2)	0 (0-0)	4 (4-4)	19 (19-19)	0 (0-0)	3 (3-3)	78 (78-78)									
PepsiCo	Quaker Life	1	32 (32-32)	120 (120-120)	1.5 (2-2)	0 (0-0)	3 (3-3)	25 (25-25)	6 (6-6)	2 (2-2)	54 (54-54)									
PepsiCo	Quaker Oats	2	40 (40-40)	150 (150-150)	3 (3-3)	0.5 (0.5-0.5)	5 (5-5)	27 (27-27)	1 (1-1)	4 (4-4)	80 (80-80)									
Post Foods	Alpha-Bits	1	30 (30-30)	120 (120-120)	1.5 (2-2)	0 (0-0)	3 (3-3)	24 (24-24)	6 (6-6)	2 (2-2)	52 (52-52)									
Post Foods	Fruity Pebbles Treats	1	22 (22-22)	90 (90-90)	2 (2-2)	1.5 (1.5-1.5)	1 (1-1)	18 (18-18)	9 (9-9)	0 (0-0)	24 (24-24)									
Post Foods	Honey-Comb	1	33 (33-33)	130 (130-130)	1 (1-1)	0 (0-0)	2 (2-2)	29 (29-29)	10 (10-10)	1 (1-1)	44 (44-44)									
Unilever	Popsicle	8	52.5 (49-86)	50 (20-70)	0 (0-1)	0 (0-0.5)	0 (0-0)	12 (10-17)	8.5 (7-11)	0 (0-0)	63 (62-64)									

Table C2. NPI scores and nutrient content: non-listed products from CFBAI brands with child-directed advertising

Top-50 brands		# of products	Serving size (g)		Total calories (kcal)		Total fat (g)		Sat fat (g)		Protein (g)		Total carbohydrate (g)		Total sugar (g)		Dietary fiber (g)		NPI score	
Company	Brand		Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range
Campbell Soup Company	Pepperidge Farm Goldfish	13	28.6	(21-46)	140	(130-150)	5	(3-6)	1	(0.5-1)	3	(2-4)	20	(20-20)	0	(0-8)	1	(1-2)	42	(26-52)
General Mills	Betty Crocker Fruit Snacks	9	23	(23-23)	80	(80-80)	0	(0-0)	0	(0-0)	0	(0-0)	19	(19-19)	10	(10-10)	0	(0-0)	42	(42-42)
General Mills	Cheerios (all other flavors)	10	28.5	(27-55)	110	(100-220)	1.5	(2-5)	0	(0-0.5)	2.5	(2-7)	23	(21-41)	8.5	(5-17)	2	(2-4)	51	(46-56)
Kellogg Company	Froot Loops (all other flavors)	1	29	(29-29)	110	(110-110)	1	(1-1)	0	(0-0)	1	(1-1)	26	(26-26)	14	(14-14)	1	(1-1)	40	(40-40)
Kellogg Company	Frosted Flakes (all other flavors)	2	29.5	(29-30)	115	(110-120)	0.5	(0-1)	0.5	(0-1)	1	(1-1)	26	(26-26)	12	(12-12)	0	(0-0)	32	(30-34)
The Kraft Heinz Company	Capri Sun (sports drink)	3	177	(177-177)	30	(30-30)	0	(0-0)	0	(0-0)	0	(0-0)	8	(8-8)	8	(8-8)	0	(0-0)	68	(68-68)
The Kraft Heinz Company	Capri Sun (fruit drink)	14	177	(177-177)	50	(50-60)	0	(0-0)	0	(0-0)	0	(0-0)	14	(13-17)	13	(13-16)	0	(0-0)	68	(66-68)
The Kraft Heinz Company	Kool-Aid (low calorie beverage)	39	237	(200-237)	0	(0-20)	0	(0-0)	0	(0-0)	0	(0-0)	0	(0-5)	0	(0-5)	0	(0-0)	70	(70-70)
The Kraft Heinz Company	Kool-Aid (other beverage)	18	237	(237-237)	60	(60-70)	0	(0-0)	0	(0-0)	0	(0-0)	16	(16-17)	16	(16-17)	0	(0-0)	68	(68-68)
The Kraft Heinz Company	Kraft Macaroni & Cheese	7	246	(232-246)	310	(270-320)	10	(5-11)	3	(2-3.5)	11	(10-13)	42	(38-49)	4	(3-6)	1	(1-2)	62	(62-66)
The Kraft Heinz Company	Lunchables (Uploaded)	7	437	(411-454)	440	(380-510)	18	(15-19)	6	(3.5-7)	13	(5-15)	57	(49-71)	20	(17-25)	3	(1-4)	66	(64-66)
The Kraft Heinz Company	Lunchables (without drink)	15	96	(52-124)	277	(140-360)	13	(7-19)	7	(3-8)	11	(6-15)	31	(9-41)	5	(2-21)	0.59	(0-4)	32	(22-66)
The Kraft Heinz Company	Lunchables (with drink)	10	274	(93-310)	330	(280-500)	14	(7-23)	6.5	(1.5-7)	11	(7-15)	42.5	(39-64)	24.5	(18-32)	1.3	(0-4)	61	(38-70)
Post Foods	Pebbles	1	29	(29-29)	110	(110-110)	0.5	(1-1)	0	(0-0)	1	(1-1)	26	(26-26)	13	(13-13)	0	(0-0)	32	(32-32)
Less-advertised brands		# of products	Serving size (g)		Total calories (kcal)		Total fat (g)		Sat fat (g)		Protein (g)		Total carbohydrate (g)		Total sugar (g)		Dietary fiber (g)		NPI score	
Company	Brand		Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range
ConAgra Foods	Chef Boyardee pasta	33	245	(205-260)	220	(150-290)	9	(1-14)	3	(0-6)	8	(5-11)	29	(23-40)	8	(2-10)	3	(2-5)	68	(62-72)
ConAgra Foods	Kid Cuisine	2	230	(211-249)	470	(450-490)	14.5	(14-15)	4.25	(3.5-5)	13.5	(12-15)	68.5	(62-75)	22	(22-22)	6	(6-6)	67	(66-68)
ConAgra Foods	Peter Pan Peanut Butter (Honey Roasted flavors)	4	33.5	(33-34)	210	(210-220)	16	(16-16)	3	(3-3)	7	(7-8)	10	(9-10)	7	(6-8)	2	(2-2)	55	(48-56)
The Dannon Company	Activia	16	113	(113-207)	100	(90-170)	2	(0-3)	1	(0-2)	4	(4-12)	16	(15-28)	13	(12-26)	0	(0-0)	70	(66-72)
The Dannon Company	Dannon Yogurt	23	150	(150-225)	140	(100-150)	4.5	(2-8)	3	(1-5)	5	(5-11)	20	(12-26)	16	(10-22)	0	(0-0)	66	(66-72)
The Dannon Company	Light & Fit (yogurt and yogurt drinks)	33	141	(113-207)	90	(45-130)	0	(0-4)	0	(0-2.5)	9	(5-13)	12	(3-16)	10	(2-12)	0.59	(0-3)	76	(72-82)
The Dannon Company	Oikos Yogurt	19	150	(141-207)	150	(110-180)	4.5	(0-7)	1.5	(0-3)	11	(10-13)	16	(14-25)	13	(11-21)	0	(0-4)	72	(68-78)
Kellogg Company	Eggo Waffles and Bites	27	70	(46-93)	180	(140-300)	7	(3-11)	2	(0.5-3.5)	4	(2-6)	28	(20-45)	6	(2-16)	0.59	(0-3)	50	(34-68)
Kellogg Company	Frosted Mini-Wheats (all other flavors)	7	55	(55-56)	190	(190-200)	1	(1-2)	0	(0-1)	5	(5-6)	47	(45-47)	12	(0-12)	6	(6-8)	74	(54-82)

Table C2. NPI scores and nutrient content: non-listed products from CFBAI brands with child-directed advertising (continued)

Less-advertised brands		# of products	Serving size (g)		Total calories (kcal)		Total fat (g)		Sat fat (g)		Protein (g)		Total carbohydrate (g)		Total sugar (g)		Dietary fiber (g)		NPI score	
Company	Brand		Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range	Median	Range
Kellogg Company	Rice Krispies (all other flavors)	3	30 (30-31)	120 (120-120)	1 (0-1)	0.5 (0-0.5)	1 (1-1)	27 (26-27)	12 (9-12)	0 (0-0.6)	38 (36-40)									
The Kraft Heinz Company	Kraft Singles	2	19 (19-19)	25 (25-25)	0 (0-0)	0 (0-0)	4 (4-4)	1 (1-1)	1 (1-1)	0 (0-0)	46 (46-46)									
The Kraft Heinz Company	Kraft/Polly-O	10	26 (24-28)	70 (70-80)	4.75 (5-6)	3 (2.5-3.5)	6 (6-7)	0 (0-1)	0 (0-1)	0 (0-0)	30 (24-32)									
PepsiCo	Quaker Instant Oatmeal	28	43 (28-62)	160 (100-240)	2 (2-5)	0.5 (0-2)	4 (3-10)	31.5 (19-41)	11 (0-14)	3 (2-10)	52 (46-82)									
PepsiCo	Quaker Life	3	32 (32-32)	120 (120-120)	1.5 (2-2)	0 (0-0)	3 (3-3)	25 (25-25)	6 (6-8)	2 (2-2)	54 (52-54)									
Unilever	Popsicle	27	50 (45-200)	40 (15-110)	0 (0-1)	0 (0-1)	0 (0-0)	10 (4-26)	8 (0-17)	0 (0-6)	64 (58-70)									