



RUDD REPORT

Targeted food and beverage advertising to Black and Hispanic consumers: 2022 update



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Executive Summary

U.S. food companies disproportionately target Black and Hispanic consumers with marketing for high-calorie, low-nutrient products including candy, sugary drinks, snacks, and fast food. The more than one billion spent on this targeted marketing exacerbates inequities in poor diet and diet-related diseases in communities of color, including heart disease, obesity, and diabetes.

This report updates the Rudd Center's previous report on ethnically targeted advertising of packaged foods and beverages that examined 2017 data. Since then, TV viewing habits and advertising trends have changed dramatically. This report examines how these broader viewing and advertising trends have impacted ethnically targeted food advertising is unknown.

METHODS

This report uses the same methods and definitions as our previous targeted marketing reports to identify TV advertising targeted to Black and Hispanic consumers in 2021. Our analyses focus on the 19 food and beverage companies with the highest advertising spending, as well as additional companies that participate in the Children's Food and Beverage Advertising Initiative (CFBAI). Nielsen syndicated market research data measured total TV and targeted TV advertising spending on Spanish-language and Black-targeted TV networks, as well as TV ads viewed by Hispanic and Black children, teens, and adults. We report changes from 2017 to 2021. In addition, we

examined companies' public statements about their targeted marketing campaigns. This report excludes targeted advertising by fast-food and other restaurants, which was previously reported in our Fast Food FACTS 2021 report.

KEY FINDINGS

Changes in food and beverage advertising: 2017 to 2021

Overall positive trends reflect major shifts in TV viewing habits and advertising in the U.S.

- TV food ad spending totaled \$4.0 billion in 2021, a decline of 25% from 2017, while ad spending on Spanish-language and Black-targeted TV declined by 18% and 63%, totaling \$411.5 and \$86 million, respectively, in 2021.
- TV ads viewed by all demographic groups also declined during the same period, including 38% fewer ads viewed by Hispanic teens on Spanish-language TV and 58% to 62% fewer TV ads viewed by children and teens overall.
- Disparities in TV advertising exposure for Black versus White youth also decreased due to greater declines in TV ads viewed by Black youth (66-70%) than by White youth (56-58%).
- These positive trends in TV food ad exposure mirrored declines in amount of time spent watching TV, including by Black and White youth, and do not appear to reflect a change in ethnically targeted marketing strategies by food companies.

Despite overall declines in ad spending and TV ad exposure, food and beverage TV advertising continued to target Black and Hispanic consumers.

- In 2021, Black youth and adults viewed 9% to 21% more food and beverage TV ads compared to their White peers, after accounting for differences in amount of time spent watching TV.
- Companies increased their focus on advertising to Spanish-speaking TV viewers, evidenced by greater ad spending on Spanish-language

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TV as a proportion of total TV ad spending. As a result, reductions in ads viewed by Hispanic youth on Spanish-language TV were lower than reductions in ads viewed by youth on TV overall.

Targeted advertising by company

Amount of ethnically targeted advertising varied widely by company.

- Mars, Hershey, and Keurig Dr Pepper, the companies with the most targeted advertising in 2017, reduced both their Spanish-language and Black-targeted TV advertising spending by 70% or more in 2021.
- Red Bull (+835%), Ferrero (+139%), Kellogg (+63%), and Mondelez (+54) increased total TV advertising spending, as well as TV ads targeting Hispanic and Black consumers, in sharp contrast to overall declines for food and beverage advertising in total.

Targeted advertising by category

Targeted TV ads continued to primarily promote unhealthy food and beverage categories.

- Candy and gum/mints, sugary drinks, savory snacks, cereal, and sweet snacks represented three-quarters of Spanish-language and Black-targeted TV ad spending in 2021, up from approximately one-half of each in 2017.
- There was no advertising for fruits or vegetables on Spanish-language or Black-targeted TV in 2021, and companies spent just \$5,000 in total TV advertising for these categories.
- A small number of brands in healthier categories had ethnically targeted TV ads in 2021, including two nut brands that advertised on Spanish-language TV and two plain water brands on Black-targeted TV programming.
- Black teens no longer viewed disproportionately

more TV ads for sugary drinks or diet drinks compared to White teens in 2021, in contrast with 2017.

Targeted marketing campaigns

Numerous marketing campaigns, including in social media, targeted multicultural youth.

- Many campaigns incorporated hip-hop and Latinx music celebrities and other youth-oriented themes. Others utilized cause-related marketing, such as donations and collaborations with non-profits to benefit communities of color, to foster goodwill for food and beverage brands.
- Coca-Cola and PepsiCo brands were responsible for the majority of marketing campaigns identified that targeted multicultural youth and communities of color.
- Ethnically targeted marketing campaigns almost exclusively promoted unhealthy products.

DISCUSSION

The social, political, and economic context in which we analyze these findings has changed markedly since the Rudd Center's last examination of ethnically targeted marketing. The disproportionate negative impact of the COVID-19 pandemic on communities of color in the U.S. has intensified the need to monitor contributors to health disparities, including the targeted marketing of unhealthy foods to Black and Hispanic consumers.

There have also been major shifts in media viewing habits and TV advertising by U.S. companies across all product categories, not just the food and beverage industry. Young people have increased their media viewing on mobile devices and non-commercial streaming services, which are not measured in these data. As a result, companies have increased the proportion of advertising budgets allocated to digital versus TV advertising.

Targeted marketing designed to appeal specifically to Hispanic and Black consumers acknowledges their value as customers and is not problematic in and of itself. Companies are responsible to their investors to continually increase sales and profits, and it appears that they are attempting to broaden their appeal to an increasingly diverse customer base. Yet nearly all ethnically targeted brands in our analysis consist of primarily unhealthy

Executive Summary

product categories. Therefore, the ethnically targeted marketing to Black and Hispanic consumers identified in this report presents a significant barrier to improved public health and health equity.

Limitations

This research provides an extensive but not exhaustive evaluation of television advertising for packaged foods and beverages targeted to Hispanic and Black consumers. Nielsen data are not available to systematically examine targeting that occurred outside of TV advertising, including digital marketing, sponsorships, and retail promotions. We did not conduct a nutritional analysis of products sold by targeted brands, but previous research has demonstrated the poor nutritional quality of the majority of products in highly targeted categories, including cereals, beverages, and snacks.

Recommendations

Key actors within industry, the public health community, and policy makers must take responsibility for reducing unhealthy marketing that targets and disproportionately impacts Hispanic and Black consumers. Making healthier choices the easiest, most affordable, and most socially acceptable options would advance racial equity and mitigate the harms of structural racism.

- Food and beverage companies should devote their enormous resources to culturally relevant and cause-related marketing campaigns for nutritious products that would contribute positively to public health and reduce preventable diet related chronic disease.

- Media companies that own programming with large audiences of Hispanic and/or Black youth can establish nutrition standards to limit unhealthy food advertising and/or provide incentives to advertise healthier products (e.g., plain water, fruits, and vegetables).
- Public health advocates, researchers, and community and grassroots organizations can increase public awareness and call for improvements to the vast amounts of unhealthy food and beverage marketing that disproportionately targets communities of color.
- Policy makers and advocates can pursue or support legislation or regulation to address unhealthy food and beverage marketing, such as sweetened beverage taxes and restricting marketing in schools.

Conclusion

This report documents that food and beverage companies continue to disproportionately target Black and Hispanic consumers with TV advertising for almost exclusively unhealthy packaged food and beverage categories. Most companies in this analysis have healthier brands in their portfolios, including plain water, low-sugar cereals, yogurt, plain dairy, fruits, and vegetables that could be promoted. Therefore, choosing to disproportionately advertise their least nutritious brands, including sugary drinks, candy, chips, and high-sugar cereals, to Black and Hispanic consumers, must be weighed against the resulting costs to communities.

Introduction

As described in the Rudd Center's previous reports, U.S. food companies disproportionately target Black and Hispanic consumers (i.e., ethnically targeted marketing) with marketing for high-calorie, low-nutrient products, including candy, sugary drinks, snacks, and fast food.^{2, 3}

The billions spent in total to market primarily unhealthy foods and beverages contribute significantly to poor diets and diet-related diseases.⁴ However, targeted marketing of such foods to Black and Hispanic consumers is especially deleterious as it exacerbates the persistent disparities in diet-related disease communities of color experience, including obesity,^{5,6} heart disease⁷ and diabetes.⁸ Researchers, advocates, and Black and Hispanic community members have identified the harms of ethnically targeted marketing, with particular concerns about targeting youth of color.⁹⁻¹²

Thus, the food industry business model, in which company profits derive mainly from the production and marketing of unhealthy foods, including through ethnically targeted marketing, does not align with public health efforts to encourage healthier consumption patterns.¹³ However, food marketers present their ethnically targeted marketing in a positive light. For example, they tout their efforts to recognize and "connect with multicultural consumers."^{14,15} Black celebrities and cultural themes convey a "cool factor," so this marketing has the added benefit of appealing to young consumers more broadly.¹⁶ Ethnically targeted marketing aimed at Black and Hispanic audiences also presents a business

growth opportunity¹⁷⁻¹⁹ due to the buying power of these consumer segments. More recently, companies have begun to promote ethnically targeted marketing, especially sponsorship of cultural events, support of youth-oriented causes in communities of color, and donations to social justice organizations, as their contribution to greater diversity, equity, and inclusion initiatives.²⁰

In 2021, we updated our previous targeted marketing report to document fast-food advertising targeted to Black and Hispanic consumers. This report found that fast-food advertising on Black-targeted TV channels and Spanish-language TV almost exclusively promoted restaurants' least healthy products. Moreover, from 2017 to 2019, there was a 33% increase in fast-food ad spending on Spanish-language TV, and disparities in exposure to ads between Black and White youth persisted.

We last examined ethnically targeted advertising of packaged foods and beverages in 2017, but TV viewing and advertising trends have changed dramatically since then. Viewing habits have shifted from traditional TV programming to streaming services (many of which are ad-free), and time spent on mobile devices has increased, in particular time spent on social media by young people.^{21,22} Moreover, overall TV ad spending in the United States declined in 2020 and 2021, during the COVID-19 pandemic.²³ Yet, the impact of these broader viewing and advertising trends on ethnically targeted food advertising is unknown. In past analyses, reductions in TV viewing were greater among White compared to Black consumers, leading to increased disparities in TV ad exposure for Black versus White youth, and company expenditures on ethnically targeted advertising also increased.^{24,25}

SCOPE OF REPORT

In this report, we present the results for TV advertising of food and beverages targeted to Black and Hispanic consumers in 2021 and compare them to 2017 data from our previous report²⁶ on ethnically targeted advertising. The present report excludes targeted advertising by fast-food and other restaurants, which we previously reported in our Fast Food FACTS 2021 report.²⁷

To determine whether companies continued to target Black and Hispanic consumers, in particular youth, with primarily unhealthy brands and food and beverage categories, we present the following analyses:

Introduction

- **Changes in food and beverage advertising: 2017 vs. 2021** discusses targeted TV advertising in the context of overall changes in food and beverage advertising and TV viewing habits.
- **Targeted advertising by company** presents individual results for the nineteen top food and beverage companies detailed in this report, including total corporate investments in ethnically targeted TV advertising, changes from 2017 to 2021, and individual brands targeted to Hispanic and Black consumers.
- **Targeted advertising by product category** assesses systematic differences in the types of products targeted to Hispanic and Black consumers. It reports categories with the most

targeted brands and TV ad spending and exposure by category for the top food and beverage companies detailed in this report.

- **Targeted marketing campaigns** summarizes press releases and company statements in the marketing press regarding campaigns and other marketing targeted to Hispanic and Black consumers, including multicultural youth.

The **Appendix** includes detailed advertising data by company, category, and brand, including brands with advertising targeted to Hispanic and/or Black consumers (see **Appendix A**) as well as company profiles detailing ethnically targeted marketing for each of the companies analyzed in this report (see **Appendix B**). In addition, we include a list of targeted marketing campaigns (see **Appendix C**) and examples of social media marketing targeted to Black and Hispanic youth (see **Appendix D**).

Definitions

DEFINITIONS OF TARGETED MARKETING INDICATORS

The analyses in this report utilize Nielsen syndicated data to identify TV advertising targeted to Hispanic and/or Black consumers. Analyses were conducted at the company, brand, and product category levels.

Targeted marketing data and indicators	Definition
Food and beverage advertising (food advertising)	Any paid announcement or persuasive message placed in the mass media by a food or beverage company (excludes fast-food and other restaurants).
Children's Food and Beverage Advertising Initiative (CFBAI)	The voluntary industry self-regulatory program through which participating food and beverage companies pledge to only advertise products that meet nutrition criteria in media primarily directed to children under age 12.
Advertising spending	Total amount spent to purchase advertising in all media, including television, digital, print, radio, cinema, and outdoor.
TV advertising spending	Total amount spent to purchase advertising on national (network, cable, and syndicated) and local (spot) TV and on Spanish-language cable and broadcast networks.
TV viewing time	Average time (hrs:min per day) spent watching TV by viewers in a specific age group, including TV programming on broadcast, cable, syndicated, and spot TV. Viewing times do not include time spent watching streaming services (e.g., Netflix, Hulu) or time spent watching TV programming on mobile devices.
Spanish-language TV	TV programming presented on Spanish-language cable and broadcast networks (e.g., Telemundo). Exposure for Spanish-language TV advertising is calculated based on the number of persons living in Hispanic households as projected by Nielsen.
Black-targeted TV	TV networks with an audience consisting of 50% or more Black viewers, including BET, VH1, NBA TV, and TV1, measured by Nielsen in 2017 (as identified in our previous report).

Definitions

Advertising exposure – all persons	The average number of TV advertisements viewed by all preschoolers (2-5 y), children (6-11 y), teens (12-17 y), and adults (18-49 y) on all television programming, measured by Nielsen.
Advertising exposure – Black and White viewers	The average number of TV advertisements viewed by Black and White preschoolers, children, teens, and adults on national TV programming only (data not available for local/spot TV), measured by Nielsen.
Advertising exposure – Hispanic viewers	The average number of TV advertisements viewed by Hispanic preschoolers, children, teens, and adults on Spanish-language TV programming, measured by Nielsen. Exposure to TV advertisements by Hispanic viewers on other types of TV is not available.
Criteria used to identify companies and brands for analysis	
Food and beverage companies	All companies in Nielsen’s “Food and Food Products” and “Confectionary, Snacks and Soft Drinks” categories.
Top food and beverage companies	Companies that spent \$100 million or more in total advertising spending and/or participated in the CFBAI in 2017 (reported in our previous report) and any additional companies that met those criteria in 2021.
Highly advertised brands	Individual brands from the top companies that spent \$500,000 or more in TV advertising in 2021.
Criteria used to identify targeted advertising	
Spanish-language TV advertising allocation	Measures Spanish-language TV advertising spending relative to total TV advertising for a company or brand, calculated by dividing a company/brand’s TV advertising spending on Spanish-language TV by its total TV advertising spending.

Definitions

Hispanic-targeted brands	Brands that spent \$100,000 or more in advertising on Spanish-language TV in 2021.
Black-targeted TV advertising allocation	Measures Black-targeted TV advertising spending relative to total TV advertising for a company or brand, calculated by dividing a company/brand's advertising spending on Black-targeted TV by its total TV advertising spending.
Black:White targeted ratios	Measures ads viewed by Black versus White viewers in the same age group, calculated as ads viewed by Black preschoolers, children, teens, and adults divided by ads viewed by White individuals in the same age group.
Black:White targeted index	Measures disproportionate exposure to TV advertising for Black versus White viewers in the same age group, after accounting for differences in time spent watching TV. Calculated by dividing Black:White targeted ratios by Black:White ratios of TV viewing times for preschoolers, children, teens, and adults.
Black-targeted brands	Brands that spent \$100,000 or more in advertising on Black-targeted TV in 2021 <u>and</u> had Black:White targeted indices > 100 (i.e., Black:White teen-targeted ratios > 1.61 and/or Black:White adult-targeted ratios >1.70).
Youth:adult targeted ratios	Measures ads viewed by preschoolers, children, and teens versus adults, calculated by dividing ads viewed by youth (in each age group) by adults.
Youth-targeted brands	Brands with child:adult targeted ratios > 0.52 and/or teen:adult targeted ratios > 0.40, the ratios of TV viewing times versus adults for these age groups (i.e., a child:adult or teen:adult targeted index > 100).

Results

We present the results for food and beverage advertising targeted to Black and Hispanic consumers in 2021, including ad spending and TV ad exposure, and assess changes versus 2017.

CHANGES IN FOOD AND BEVERAGE ADVERTISING: 2017 TO 2021

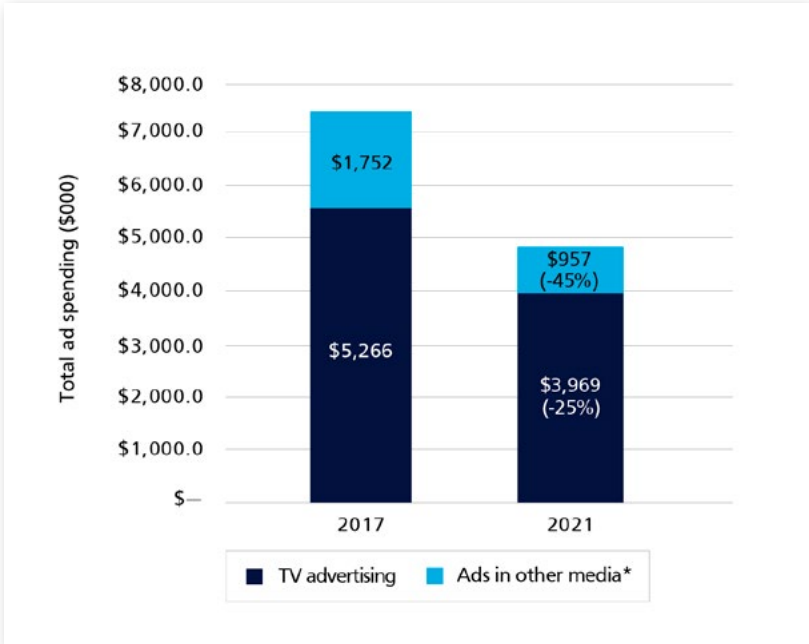
The amount of food and beverage advertising was substantially lower in 2021 compared to 2017. Total advertising spending declined by 30%, from \$7.0 billion in 2017 to \$4.9 billion in 2021. Spending on television advertising also declined, but at a lower rate (down 25%) compared to all other media (down 45%) (see **Figure 1**).^a

Exposure to food and beverage ads on television declined even more. Children and teens viewed approximately 60% fewer ads in 2021 than in 2017, while adults viewed 45% fewer (see **Figure 2**). These declines were nearly identical to reductions in the amount of time that children, teens, and adults spent watching traditional television programming (see **Figure 3**).

Changes in advertising targeted to Hispanic and Black consumers

Total food and beverage advertising spending on targeted TV channels also declined substantially from 2017 to 2021. Spanish-language TV advertising went from \$411.5 million in 2017 to \$336.5 million in 2021. This 18% decline was somewhat less than the 25%

FIGURE 1. CHANGES IN TOTAL FOOD AND BEVERAGE AD SPENDING: 2017 VS. 2021

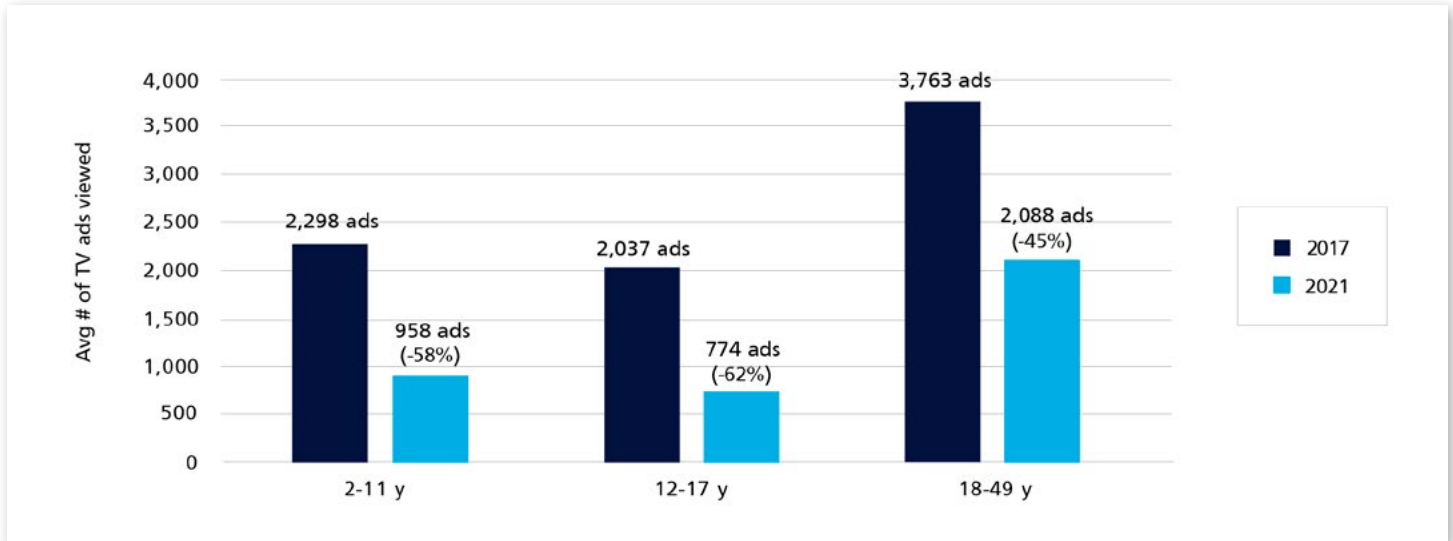


*Ads in other media includes digital, print, radio, cinema, and outdoor
 Source: Analysis of 2017 and 2021 Nielsen data (Nielsen Global Media)

^a In 2020, Nielsen changed its methodology to capture additional forms of digital advertising, so a direct comparison of spending on digital advertising in 2017 vs. 2021 is not available. These total ad spending numbers include \$2.7 million in internet advertising in 2017 and \$654.4 million in digital advertising in 2021. Therefore, these declines in ad spending on other media are likely understated.

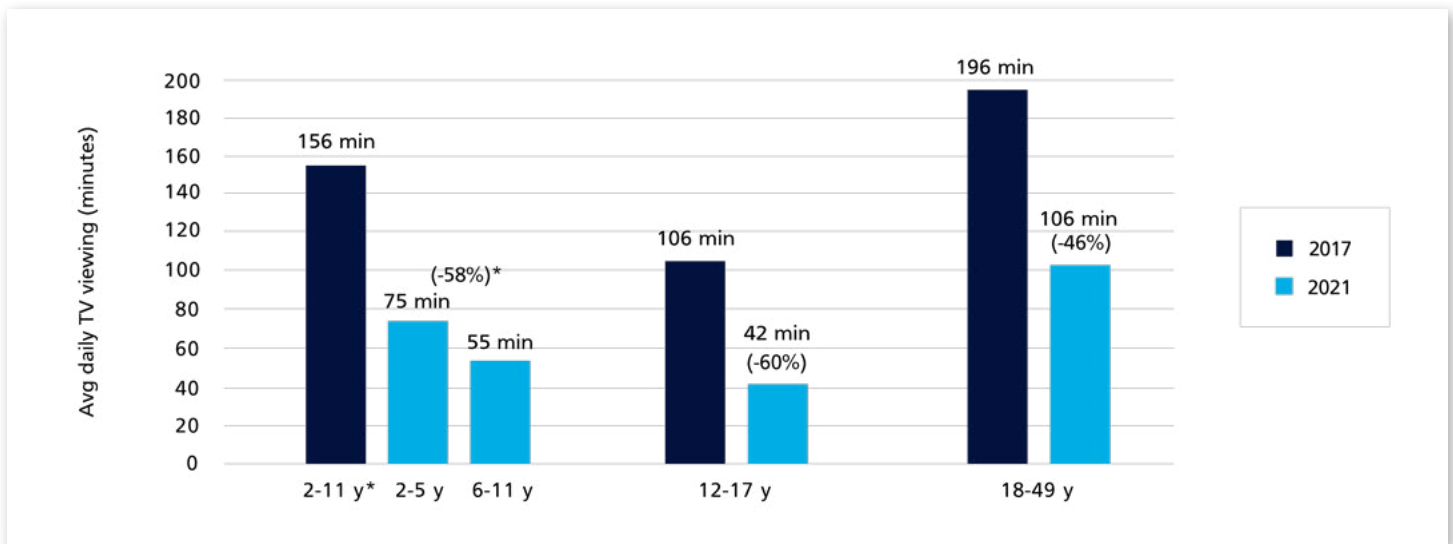
Results

FIGURE 2. CHANGES IN FOOD AND BEVERAGE TV ADS VIEWED BY AGE GROUP: 2017 VS. 2021



Source: Analysis of 2017 and 2021 Nielsen data (Nielsen Global Media)

FIGURE 3. CHANGES IN AVERAGE DAILY TV VIEWING BY AGE GROUP: 2017 VS. 2021



*TV viewing time data not available for 2-5 y and 6-11 y separately in 2017. We averaged TV viewing times for the two age groups in 2021 to calculate 2017 vs. 2021 change.

Source: Analysis of 2017 and 2021 Nielsen data (Nielsen Global Media)

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decline in total TV advertising spending (see [Table 1](#)). As a result, food and beverage companies allocated a higher share of their TV advertising budgets to Spanish-language advertising in 2021 (8.5%) compared to 2017 (7.8%).

In contrast, food and beverage advertising spending on Black-targeted TV declined at a greater rate (-63%) compared to total TV advertising, from \$235.3 million in 2017 to \$86.0 million in 2021. Accordingly, food and beverage companies allocated a lower proportion of their total TV advertising budgets to Black-targeted TV channels in 2021 (2.2%) than in 2017 (4.5%).

Exposure to TV food ads

On Spanish-language TV, food and beverage ads viewed declined by 41% for Hispanic preschoolers and children, 38% for Hispanic teens, and 43% for Hispanic adults (see [Table 2](#)). Consistent with lower rates of decline in ad spending on Spanish-language TV from 2017 to 2021, reductions in ads viewed were also lower than reductions in food ads viewed on other TV programming.

As found in changes in overall exposure to food and beverage TV ads, declines in food ads viewed by Black

and White viewers also mirrored declines in time spent watching TV (see [Figures 4 and 5](#)). Black children and teens viewed 66% to 70% fewer food ads in 2021 than in 2017, and they spent 65% to 68% less time watching TV. Declines in ads viewed by White children and teens were somewhat lower (-56% to -58%), which was also comparable to declines in time spent watching TV (-56% to -57%). As a result, disparities in ads viewed by Black versus White youth declined slightly from 2021 to 2017.

However, Black youth and adults continued to view substantially more food and beverage TV ads compared to their White peers. Ratios of ads viewed by Black versus White viewers in all age groups declined from 2017 to 2021, but differences in TV viewing times declined at approximately equal or greater rates. As a result, targeting indices stayed the same or increased for ads viewed by Black children, teens, and adults relative to White viewers. Black preschoolers were the only age group to experience a decline in ads that was greater than declines in viewing times. In 2021, Black viewers continued to view 9% to 21% more food ads than would be expected after adjusting for differences in time spent watching TV.

TARGETED ADVERTISING BY COMPANY

Nineteen companies are included for additional analyses in this report (see [Table 3](#)). Eighteen had been included in the 2019 report (which analyzed 2017 data), consisting of 16 CFBAI participants and 2 additional companies that spent more than \$100 million in total

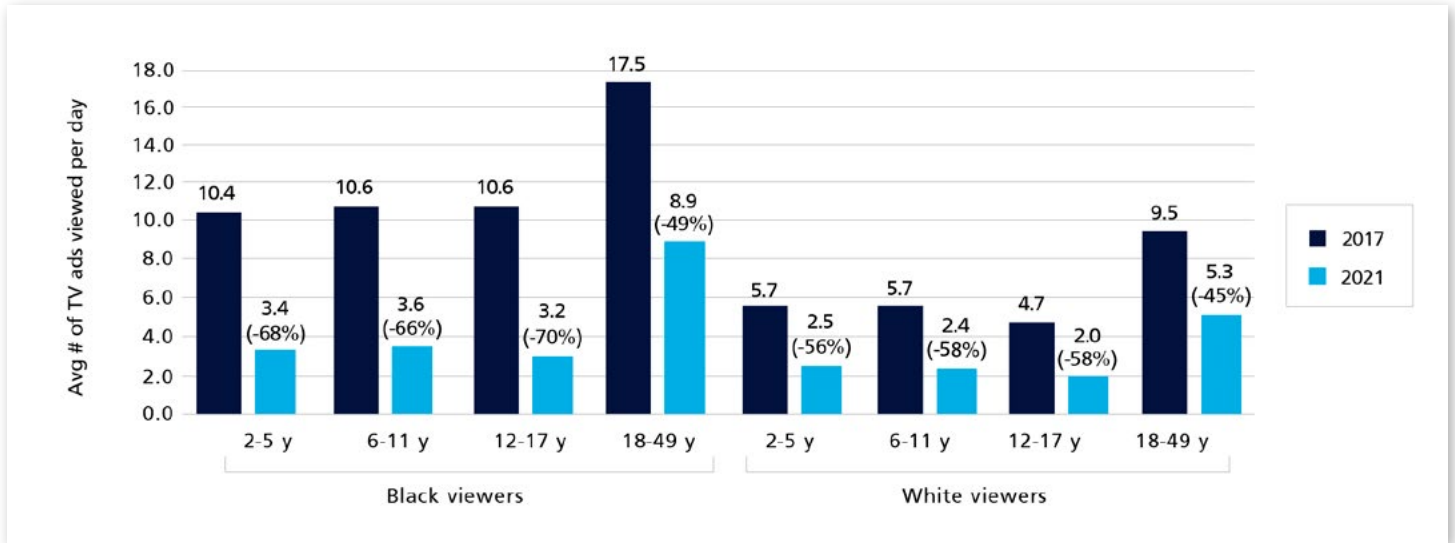
TABLE 1. CHANGES IN KEY MEASURES OF TARGETED FOOD AND BEVERAGE TV ADVERTISING SPENDING: 2017 VS. 2021

Key measures	2017	2021
Spanish-language TV advertising spending	\$411.5 mill	\$336.5 mill
- Proportion of total TV advertising	7.8%	8.5%
Black-targeted TV advertising spending	\$235.3 mill	\$86.0 mill
- Proportion of total TV advertising	4.5%	2.2%

Source: Analysis of 2017 and 2021 Nielsen data (Nielsen Global Media)

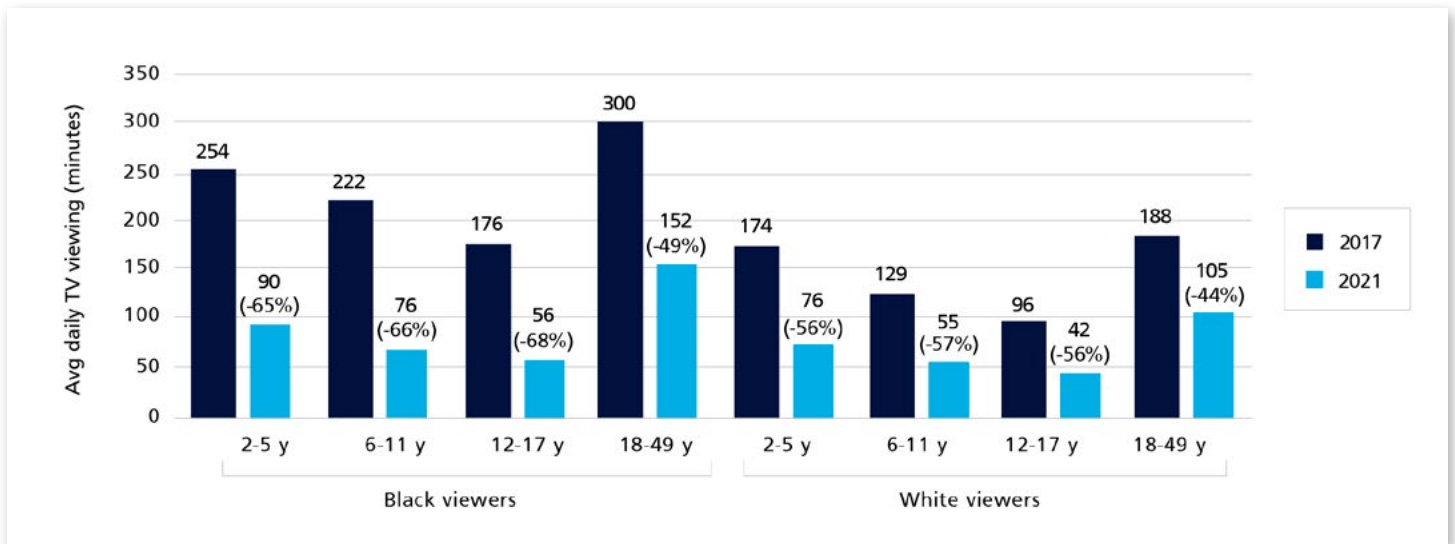
Results

FIGURE 4. CHANGES IN FOOD AND BEVERAGE TV ADS VIEWED BY BLACK AND WHITE VIEWERS: 2017 TO 2021



Source: Analysis of 2017 and 2021 Nielsen data (Nielsen Global Media)

FIGURE 5. CHANGES IN TIME SPENT WATCHING TV BY BLACK AND WHITE VIEWERS: 2017 TO 2021



Source: Analysis of 2017 and 2021 Nielsen data (Nielsen Global Media)

TABLE 2. CHANGES IN KEY MEASURES OF TARGETED FOOD AND BEVERAGE TV ADVERTISING EXPOSURE: 2017 VS. 2021

	2017	2021
<i>Ads viewed on Spanish-language TV by Hispanic viewers</i>		
- Preschoolers (2-5 y)	510.4	344.0
- Children (6-11 y)		256.5
- Teens (12-17 y)	366.5	226.9
- Adults (18-49 y)	794.8	451.2
<i>Ratio of ads viewed (Black:White viewers)</i>		
- Preschoolers (2-5 y)	1.82	1.33
- Children (6-11 y)	1.87	1.51
- Teens (12-17 y)	2.23	1.61
- Adults (18-49 y)	1.84	1.70
<i>Targeting index (ratio of ads viewed/ratio of TV viewing times* for Black:White viewers)</i>		
- Preschoolers (2-5 y)	124	113
- Children (6-11 y)	108	109
- Teens (12-17 y)	121	121
- Adults (18-49 y)	115	118

*Black:White TV viewing ratios = 1.18 (ages 2-5 y), 1.38 (ages 6-11 y), 1.33 (ages 12-17 y), 1.44 (ages 18-49 y)

Source: Analysis of 2017 and 2021 Nielsen data (Nielsen Global Media)

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ad spending 2017. Of note, these two companies (Tyson and Wonderful) spent less than \$100 million in 2021. One company was added to the list (Red Bull) because it spent more than \$100 million in total advertising in 2021. Together, these companies spent \$3.65 billion in total advertising in 2021 and represented 74% of all food and beverage advertising spending.

TV advertising spending by company

TV advertising spending by these 19 companies in 2021 totaled \$2.98 billion, contributing 82% of their total advertising spending in all media. Compared to 2017, these companies' TV advertising declined by 24%, which was comparable to the 25% decline in TV advertising spending by all food and beverage companies (see [Appendix Tables A1](#) and [A2](#)).

However, changes varied widely by company (see [Appendix B](#) for company profiles summarizing each company's ethnically targeted advertising). Four companies increased their total TV advertising, including Red Bull (+835%), Ferrero (+139%), Kellogg (+63%), and Mondelez (+54%), while Campbell Soup and PepsiCo advertising declined at a lower-than-average rate (12-13%). In contrast, TV ad spending declined by 50% or more for four companies: Mars, General Mills, Wonderful, and Conagra.

Spanish-language TV advertising

The companies in our analysis spent a total of \$264.6 million to advertise on Spanish-language TV in 2021, but investments in Spanish-language TV varied widely by company (see [Table 4](#)). Thirteen of these nineteen companies advertised on Spanish-language TV in 2021. On average, these companies allocated 10.1% of their total TV advertising spending to Spanish-language TV. Mondelez invested the highest proportion to Spanish-language TV (23%), followed by Nestle and Kellogg (over 18%). Kellogg also spent more than any other company on Spanish-language TV (almost \$60 million), followed by PepsiCo and Mondelez (each spent more than \$40 million). However, PepsiCo invested a relatively low 8.2% of its TV ads to Spanish-language.

TABLE 3. TOP FOOD AND BEVERAGE COMPANIES AND TOTAL AD SPENDING: 2021

Company	CFBAI participant*	Included in 2019 report (2017 data)	2021 total ad spending (\$000)
PepsiCo	✓	✓	\$581,800
Kellogg Company	✓	✓	\$391,866
The Coca-Cola Company	✓	✓	\$366,034
The Hershey Company	✓	✓	\$302,449
General Mills	✓	✓	\$239,584
Mondelez International	✓	✓	\$199,945
The Kraft Heinz Company	✓	✓	\$276,265
Mars	✓	✓	\$202,853
Ferrero USA	✓	✓	\$151,588
Nestle USA	✓	✓	\$169,699
Keurig Dr Pepper**	✓	✓	\$118,755
Red Bull			\$113,064
Campbell Soup Company	✓	✓	\$116,524
Unilever United States	✓	✓	\$143,540
Tyson Foods		✓	\$125,063
Danone North America	✓	✓	\$52,595
The Wonderful Company		✓	\$67,596
Post Foods	✓	✓	\$29,239
Conagra Brands, Inc.	✓	✓	\$1,967

*American Licorice Company also participated in CFBAI in 2021, but the company had no advertising spending.

**Formerly, Dr Pepper Snapple Group

Source: Analysis of 2021 Nielsen data (Nielsen Global Media)

 Results

TABLE 4. SPANISH-LANGUAGE TV ADVERTISING SPENDING IN 2021 BY COMPANY

Company	2021 Spanish-language TV ad spending (\$000)	% of total TV ad spend	Change vs. 2017	Targeted brands*
Kellogg	\$59,985	18.1%	+71%	Special K, Frosted Flakes , Froot Loops , Eggo Waffles, Pop-Tarts, Sunshine Cheez-It, Pringles Cheddar Cheese
PepsiCo	\$42,834	8.2%	+86%	Lays Potato Chips, Cheetos, Pepsi (regular soda), Rockstar Energy, Tostitos Scoops!, Quaker Oatmeal, Diet Pepsi
Mondelez	\$41,673	22.9%	+355%	Oreo, Ritz Crackers, Trident Gum, Belvita Cookies, Sour Patch Kids, Chips Ahoy!
Coca-Cola	\$26,559	9.1%	-44%	Coca-Cola Classic, Coca-Cola Zero
Nestle	\$26,085	19.7%	-52%	Nescafe, Nido, Coffee-Mate Creamer, Nestle Cream, Hot Pockets, La Lechera, Maggi Foods, Nestle Cocoa
General Mills	\$25,119	12.1%	-25%	Yoplait Yogurt, Cinnamon Toast Crunch Cereal , Lucky Charms , Honey Nut Cheerios, Cheerios Oat Crunch
Mars	\$23,093	14.4%	-72%	M&Ms, Snickers, Wrigley's Extra, Skittles, Twix
Red Bull	\$9,911	9.5%	**	Red Bull
Unilever	\$3,780	4.2%	-80%	Hellmanns Mayonaise
Ferrero	\$3,031	2.1%	**	Nutella, Kinder Joy
Kraft Heinz	\$2,325	1.4%	-79%	Planters Nuts, Philadelphia Cream Cheese, Lunchables
Hershey	\$218	0.1%	-99%	
Wonderful	\$22	0.1%	-12%	

*Excludes company-level ads

**Company did not advertise on Spanish-language TV in 2017

Bold indicates brands targeting children and/or teens

Source: Analysis of 2017 and 2021 Nielsen data (Nielsen Global Media)

Results

In contrast to the overall 29% decline from 2017 to 2021, some companies increased their ad spending on Spanish-language TV. Red Bull and Ferrero advertised on Spanish-language TV in 2021, but not in 2017, and three additional companies (Mondelez, Kellogg, and PepsiCo) increased their Spanish-language TV advertising.

In contrast, five companies with Spanish-language TV ads in 2017 had no Spanish-language ads in 2021 (Keurig Dr Pepper, Post Foods, Campbell Soup, Dannon, and Conagra), and five additional companies reduced their Spanish-language TV advertising by more than 50% (Nestle, Mars, Unilever, Kraft Heinz, and Hershey).

Black-targeted TV advertising

The companies in our analyses spent \$70.6 million to advertise on Black-targeted TV in 2021 (see [Table 5](#)). These companies invested on average just 2.4%

of their TV advertising budgets to Black-targeted channels, but only one company (Conagra) did not advertise at all on Black-targeted channels. Post, Ferrero, and Red Bull each allocated more than 5% of their TV ad budgets to Black-targeted TV, and three additional companies (Dannon, Unilever, and Kellogg) allocated an above-average amount (3.6% or 3.7%). PepsiCo spent the most on Black-targeted TV channels (\$12.1 million), followed by Kellogg (almost \$12 million) and Ferrero (\$8.5 million).

In contrast to the 63% decline in all food and beverage advertising spending on Black-targeted TV, nine companies increased their spending from 2017 to 2021. Red Bull ranked fourth in Black-targeted TV ad spending in 2021 but did not advertise there in 2017, while Dannon's spending increased from \$74,000 to \$1.8 million. Three additional companies more than tripled their Black-targeted ad spending from 2017 to 2021 (Post, Ferrero, and Campbell Soup), and spending by Kellogg, Kraft Heinz, Nestle, and Wonderful also increased. On the other hand, three of the top spenders in 2021 (Mars, Hershey, and Keurig Dr Pepper) reduced their Black-targeted TV ad spending by more than 70%.

TABLE 5. BLACK-TARGETED TV ADVERTISING SPENDING IN 2021 BY COMPANY

Company	2021 Black-targeted TV ad spending (\$000)	% of total TV ad spend	Change vs. 2017	Targeted brands*
PepsiCo	\$12,072	2.3%	-33%	Frito-Lay Snacks, Gatorade, Tostitos Dips, Mtn Dew (regular), Lays, Ruffles Potato Chips, Cheetos Crunch Pop Mix, Naked Juices, Doritos, Cheetos, Lipton Iced Tea, Propel, Pepsi (regular), Diet Mtn Dew, Tropicana Fruit Juices, Gatorade Zero
Kellogg	\$11,788	3.6%	+15%	Rice Krispies Treats, Pop-Tarts, Sunshine Cheez-It, Club Crackers, Tiger Paws, Eggo Waffles, Frosted Flakes , Froot Loops , Pringles Potato Chips, Morningstar Farms, Bear Naked Granola, Special K, Keebler Town House, Nutri-Grain Snack Bars, Apple Jacks
Ferrero	\$8,525	5.8%	+344%	Butterfinger, Crunch, Kinder, Keebler Cookies, Trolli, Nutella, Sweetarts, Famous Amos

*Excludes company-level ads **Company did not advertise on Black-targeted TV in 2017

Bold indicates brands targeting children and/or teens

Continued on next page

Results

TABLE 5. BLACK-TARGETED TV ADVERTISING SPENDING IN 2021 BY COMPANY (CONTINUED)

Company	2021 Black-targeted TV ad spending (\$000)	% of total TV ad spend	Change vs. 2017	Targeted brands*
Red Bull	\$5,339	5.1%	**	Red Bull
General Mills	\$5,028	2.4%	-32%	Pillsbury Dough, Nature Valley Granola Bar, Cinnamon Toast Crunch , Lucky Charms , Old El Paso Taco Shells, Chex Mix, Cheerios Oat Crunch
Hershey	\$4,780	1.8%	-79%	Cadbury
Coca-Cola	\$3,553	1.2%	-32%	Sprite, AHA Bottled Water
Unilever	\$3,196	3.6%	-34%	Hellmanns Mayonnaise, Breyers Ice Cream, Klondike Ice Cream, Lipton Iced Tea, Knorr Rice Sides, Talenti, Pure Life Iced Tea (diet)
Mars	\$3,141	2.0%	-72%	M&Ms, Snickers, Wrigley's Extra, Skittles, Twix
Kraft Heinz	\$2,759	1.7%	+20%	Lunchables , Kraft Macaroni & Cheese
Mondelez	\$1,924	1.1%	-44%	Ritz Crackers, Triscuits, Oreo Thins, Sour Patch Kids
Dannon	\$1,817	3.7%	+2345%	Silk Plant Milk, Evian, Oikos, Two Good Yogurt, Dannon Light & Fit, Activia
Post	\$1,785	6.3%	+501%	Honey Bunches of Oats, Dunkin Cereal, Pebbles
Campbell Soup	\$1,743	1.7%	+287%	Pepperidge Farm Goldfish , Snyder's of Hanover Pretzels
Nestle	\$1,494	1.1%	+33%	Hot Pockets, Stouffers Entrees, Carnation Breakfast, Toll House Chocolate Morsels
Tyson	\$1,299	2.3%	-67%	Jimmy Dean Entrees, Hillshire Farms
Wonderful	\$226	0.8%	**	Fiji Bottled Water
Keurig Dr Pepper	\$163	0.2%	-97%	

*Excludes company-level ads **Company did not advertise on Black-targeted TV in 2017

Bold indicates brands targeting children and/or teens

Source: Analysis of 2017 and 2021 Nielsen data (Nielsen Global Media)

Results

Targeted brands

We identified 228 highly advertised brands in 2021 (i.e., \$500,000 or more in TV advertising) offered by the 19 companies in our analysis. More than one-half of these brands ($n=128$, 56%) targeted Hispanic and/or Black consumers (see [Figure 6](#)). This proportion was lower than in 2017, when two-thirds of highly advertised brands (66%) targeted Hispanic and/or Black consumers. [Appendix Tables A3 to A5](#) provide all data on Hispanic-targeted, Black-targeted, and non-targeted highly advertised brands.

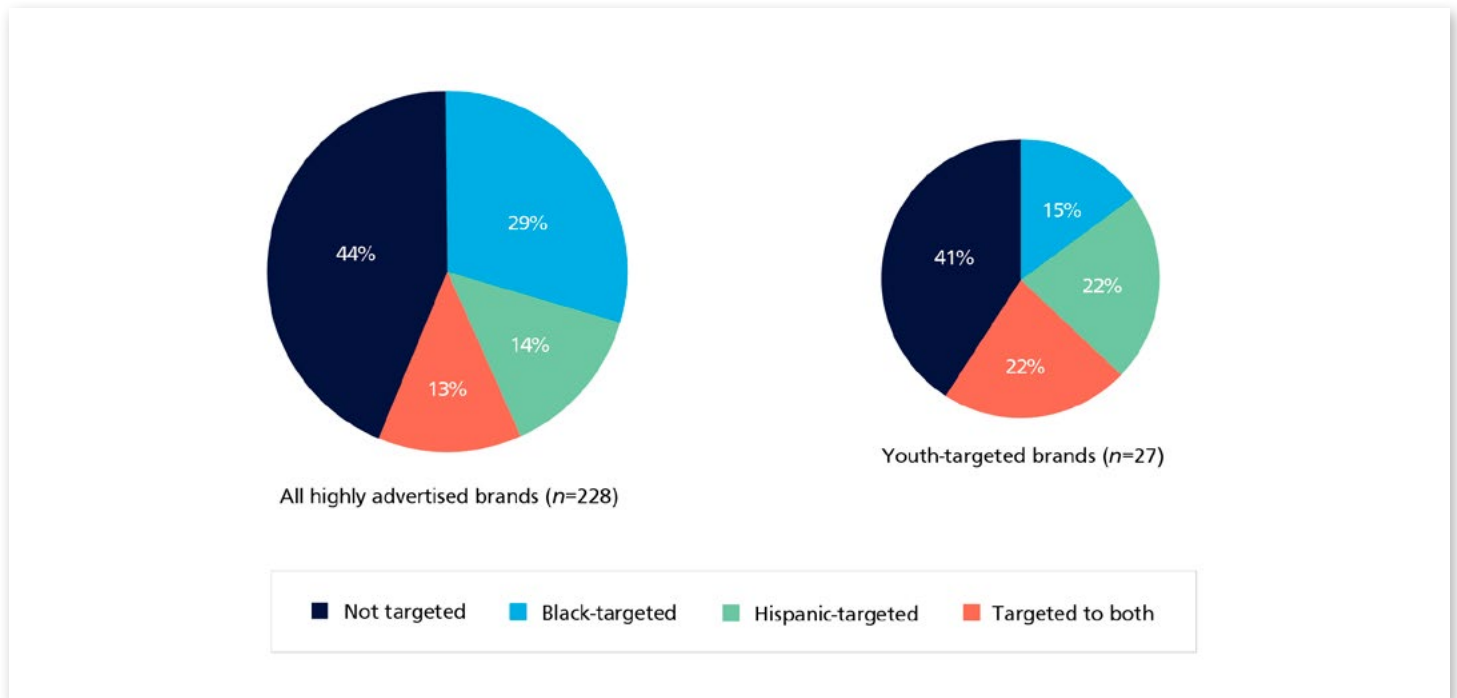
In 2021, 27 highly advertised brands (12%) targeted children and/or teens, which was similar to the proportion of youth-targeted brands in 2017 (14%). Compared to other highly advertised

brands, youth-targeted brands were less likely to target only Black or Hispanic consumers, but more likely to target both. However, in 2021 youth-targeted brands were less likely to target Hispanic and/or Black consumers ($n=16$, 59%) than in 2017 (85%).

Of the 228 highly advertised brands, 61 (27%) targeted Hispanic consumers in 2021 (defined as brands that spent more than \$100,000 on Spanish-language TV advertising in 2021, see [Appendix Table A3](#)). Five brands spent more than \$10 million: Coca-Cola Classic and Coca-Cola Zero, Lays and Cheetos (PepsiCo), and Special K cereal (Kellogg). Five of these brands also targeted children and teens (Frosted Flakes, Froot Loops, Cinnamon Toast Crunch, and Lucky Charms cereals and Lunchables).

In addition, 152 brands spent more than \$100 million in advertising on Black-targeted TV in 2021, including 97 brands (43%) that were highly targeted to Black consumers (included brands with Black:White targeted indices of 100 or higher for teens and/or adults, see

FIGURE 6. TARGETING BY HIGHLY ADVERTISED BRANDS IN 2021: TOTAL AND YOUTH-TARGETED BRANDS



Source: Analysis of 2021 Nielsen data (Nielsen Global Media)

Results

Appendix Table A4). Nine brands spent more than \$1 million in advertising on Black-targeted TV, led by Red Bull (\$5.3 million), Butterfinger candy bar (Mars, \$1.7 million), and Sprite regular soda (Coca-Cola, \$1.6 million). Brands with the highest ratios of ads viewed by Black versus White teens included Pepperidge Farm Goldfish (Campbells, 2.53), Frosted Flakes (Kellogg, 2.33), Evian (Dannon, 2.32), and Froot Loops (Kellogg, 2.26).

TARGETED ADVERTISING BY PRODUCT CATEGORY

This section provides category-level analyses of Hispanic- and Black-targeted advertising by highly advertised brands, as well as targeted TV ad spending and ad exposure. In 2021, as in 2017, targeting varied widely by food and beverage category, but some highly targeted categories changed during this time. **Appendix Table A6** provides all ad spending data by product category.

Highly advertised brands

Table 6 lists the food and beverage categories examined in this report. Due to small numbers and similar targeting strategies, we combined some categories in the highly advertised brand analysis.

More than one-half of highly advertised brands ($n=128$, 55%) belonged to just five categories: savory snacks, candy, cereal, prepared meals, and sweet snacks/desserts, while just 20 highly advertised brands (9%) belonged to the healthiest categories (unsweetened drinks and nuts). There were no highly advertised fruit or vegetable brands in 2021.

As noted previously, 56% of highly advertised brands in 2021 targeted Hispanic and/or Black consumers. Eight categories had a higher-than-average proportion of targeted brands, ranging from 82% of yogurt and sweetened milk drinks (e.g., Nesquik, Carnation breakfast) to 62% of regular soda and energy drinks (see **Figure 7**).

TABLE 6. HIGHLY ADVERTISED BRANDS BY PRODUCT CATEGORY

Combined category	Category	# of highly advertised brands*
Savory snacks	Savory snacks	31
	Candy	25
Candy and gum/mints	Gum/mints	4
	Cereal	25
Prepared meals	Prepared meals	25
Sweet snacks/desserts	Sweet snacks/desserts	20
Diet soda and other diet drinks	Diet soda	7
	Other diet drinks	7
Juice and plain water	Juice	7
	Plain water	7
Condiments/food prep	Condiments/food prep	12
Regular soda and energy drinks	Regular soda	8
	Soda brands	2
	Energy drinks	3
Yogurt and milk drinks	Yogurt	6
	Sweetened milk drinks	5

*Brands with >\$500,000 in TV advertising in 2021

Continued on next page

Results

As in 2017, sweet and savory snack brands and some types of sugary drinks (regular soda and energy drinks) were more likely to target Hispanic and/or Black consumers. However, some of these highly targeted categories in 2021, including cereals, yogurt and sweetened milk drinks, condiments/food prep, and nuts, had been less likely to target them in 2017.

Brands in another seven categories were less likely to target Hispanic and/or Black consumers in 2021, ranging from 29% of juice and plain water brands to 52% of candy and gum/mint brands (see [Figure 8](#)). Some of these categories were also less likely to target these groups in 2017, including juice and plain water and prepared meals.

However, brands in some highly targeted categories in 2017 no longer disproportionately targeted these consumers in 2021. Most notably, 33 of 35 candy and gum/mint brands targeted Black and/or Hispanic consumers in 2017 compared to 15 of 29 brands in 2021. Diet soda and other sugary drink brands (sports drinks and flavored waters) were also less likely to target Black and/or Hispanic consumers in 2021 than in 2017.

TV advertising spending by category

Consistent with overall declines in TV food and beverage advertising spending from 2017 to 2021, spending declined for most categories (see [Table 7](#)). However, candy and gum/mints remained the most highly advertised food category on TV, despite a 31% decline in ad spending.

In contrast to overall declines in TV ad spending, advertising increased for three categories: sugary drinks increased by almost 50%, cereal ad spending more than doubled, and spending on diet drinks more than tripled. These three categories moved up to second, fourth, and fifth in TV ad spending in 2021. TV ad spending on savory snacks declined by 9% from 2017 to 2021, but the category moved up from fourth in spending in 2017 to third in 2021.

TABLE 6. HIGHLY ADVERTISED BRANDS BY PRODUCT CATEGORY (CONTINUED)

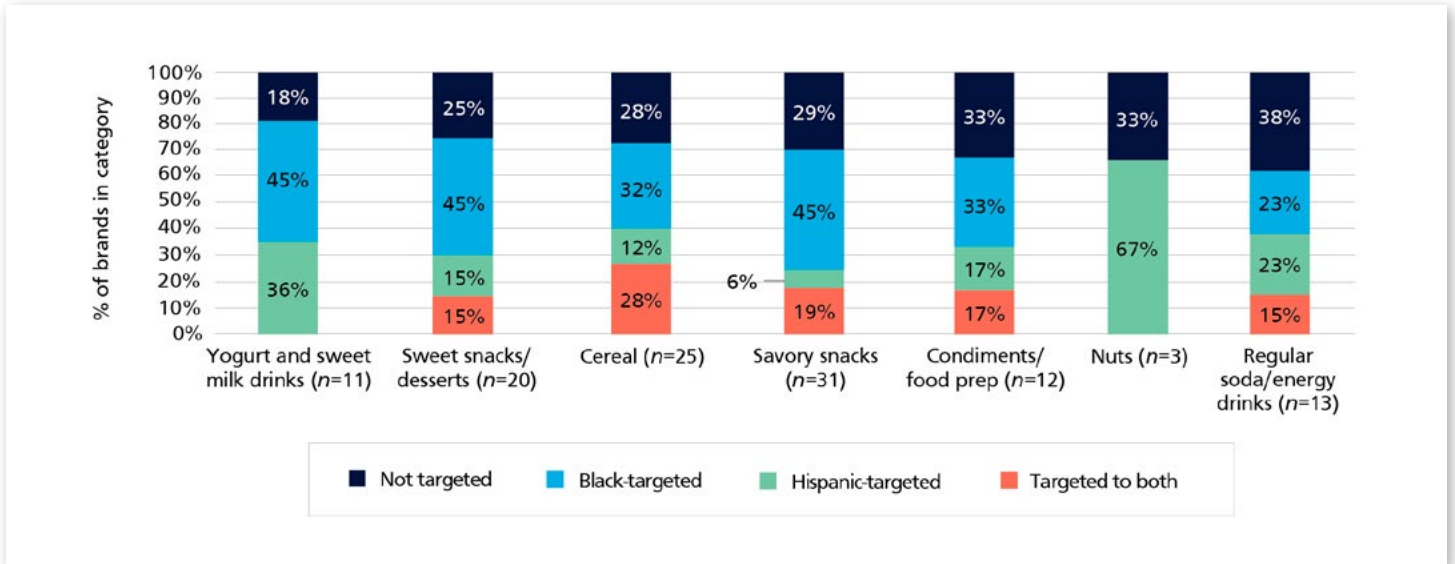
Combined category	Category	# of highly advertised brands*
Other sugary drinks	Other sugary drinks	9
Other dairy	Other dairy	6
Company-level ads	Company-level ads	5
Nuts	Nuts	3
	Meat	7
	Coffee/tea unsweetened	3
All other	Baby food	1

*Brands with >\$500,000 in TV advertising in 2021

Source: Analysis of 2021 Nielsen data (Nielsen Global Media)

Results

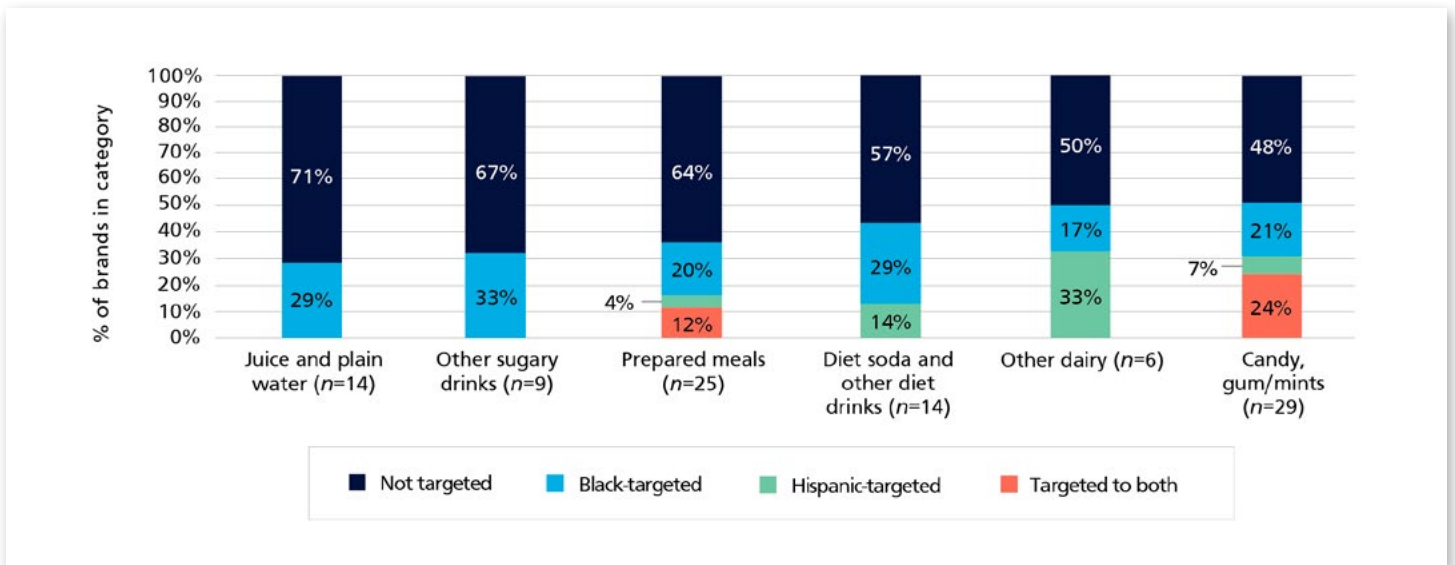
FIGURE 7. CATEGORIES WITH BRANDS* THAT WERE **MORE** LIKELY TO TARGET HISPANIC AND/OR BLACK CONSUMERS



*Includes highly advertised brands

Source: Analysis of 2021 Nielsen data (Nielsen Global Media)

FIGURE 8. CATEGORIES WITH BRANDS* THAT WERE **LESS** LIKELY TO TARGET HISPANIC AND/OR BLACK CONSUMERS



*Includes highly advertised brands

Source: Analysis of 2021 Nielsen data (Nielsen Global Media)

Results

TABLE 7. CHANGES IN FOOD AND BEVERAGE ADVERTISING SPENDING ON TV BY CATEGORY: 2017 TO 2021

Category	Total TV ad spending (\$000)			Spanish-language TV ads (\$000)			Black-targeted TV ads		
	2017*	2021	% change	2017*	2021	% change	2017*	2021	% change
Candy, gum, mints	\$776,533	\$536,822	-31%	\$55,336	\$34,385	-38%	\$21,517	\$14,250	-34%
Sugary drinks	\$332,900	\$490,899	+47%	\$38,854	\$37,807	-3%	\$9,462	\$11,407	+21%
Savory snacks	\$403,446	\$366,027	-9%	\$44,439	\$44,416	0%	\$7,216	\$10,639	+47%
Cereal	\$133,175	\$329,782	+148%	\$9,701	\$50,003	+415%	\$767	\$8,644	+1027%
Diet drinks	\$76,429	\$256,562	+236%	\$14,417	\$10,838	-25%	\$1,059	\$2,058	+94%
Sweet snacks/ desserts	\$457,690	\$254,077	-44%	\$16,099	\$34,706	+116%	\$7,850	\$8,281	+5%
Prepared meals	\$491,440	\$227,552	-54%	\$99,307	\$12,631	-87%	\$14,031	\$4,748	-66%
Yogurt, other dairy, sweet milks	\$205,639	\$156,724	-24%	\$16,137	\$18,221	+13%	\$11,634	\$3,141	-73%
Condiments, food prep	\$392,311	\$137,089	-65%	\$10,466	\$7,840	-25%	\$10,515	\$3,679	-65%
Water, juice	\$101,925	\$85,937	-16%	\$6,773	\$0	-100%	\$3,666	\$2,093	-43%
All other	\$251,362	\$135,255	-46%	\$14,633	\$13,789	-6%	\$9,463	\$1,693	-82%
Total	\$3,622,849	\$2,976,726	-18%	\$326,163	\$264,635	-19%	\$97,180	\$70,633	-27%

*2017 data reported for highly advertised brands only

Source: Analysis of 2021 Nielsen data (Nielsen Global Media)

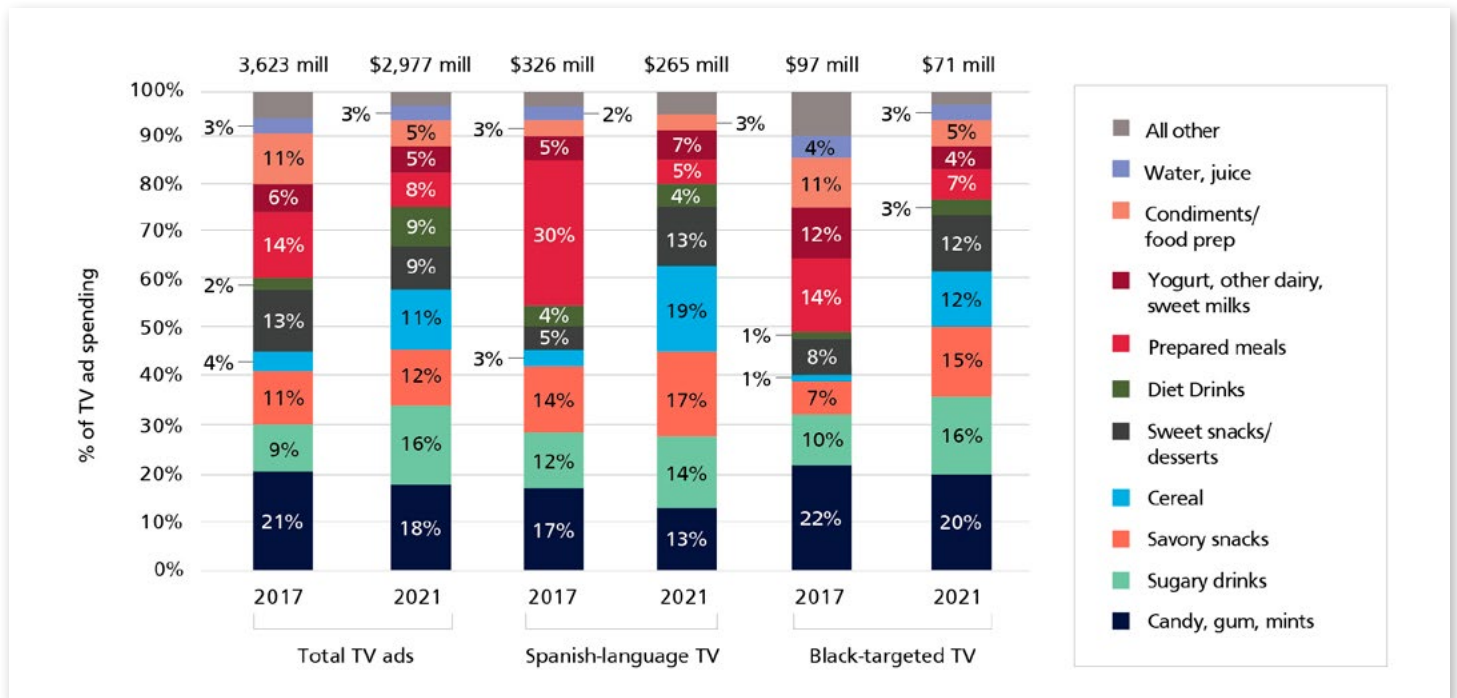
Results

Ad spending on sweet snacks and prepared meals declined by approximately 50%, and these two categories moved down to numbers six and seven in 2021, from two and three in 2017.

In 2021 as in 2017, a small number of categories were responsible for the majority of TV food and beverage advertising spending, including in Spanish-language and Black-targeted TV (see [Figure 9](#)). Candy and gum/mints, sugary drinks, savory snacks, cereal, and sweet snacks contributed 66% of total TV advertising spending in 2021, compared to 58% in 2017. However, these five categories increased from 51% of Spanish-language TV advertising in 2017 to 76% in 2021 and from 48% of Black-targeted TV advertising to 75% in 2021.

Some changes in category-level ad spending on Spanish-language and Black-targeted TV channels were notable. For example, despite large increases in total TV advertising for sugary drinks and diet drinks, ad spending for these categories declined on Spanish-language TV and increased at lower rates on Black-targeted TV. In contrast, some categories with declines in total TV ad spending increased or maintained their spending on Hispanic and/or Black-targeted TV, including savory snacks (no change on Spanish-language TV, 47% increase on Black-targeted TV), sweet snacks (more than double on Spanish-language TV, increased by 5% on Black-targeted TV), and yogurt and sweetened milk (13% increase on Spanish-language TV). Moreover, there was no advertising for juice and plain water on Spanish-language TV in 2021 and Black-targeted TV ads for this category declined at a much greater rate than total TV advertising (82% vs. 16%).

FIGURE 9. PROPORTION OF TV ADVERTISING SPENDING BY CATEGORY: 2021



Source: Analysis of 2021 Nielsen data (Nielsen Global Media)

Results

TV AD EXPOSURE BY CATEGORY

In this section, we examine the categories of foods and beverages in TV ads viewed in 2021 by Hispanic viewers on Spanish-language TV and differences in ads viewed by Black and White viewers. Data are reported by age group, including preschoolers (2-5 y), children (6-11 y), teens (12-17 y), and adults (18-49 y). [Appendix Table A7](#) provides all ad exposure data by category.

Hispanic exposure to TV ads on Spanish-language TV

The distribution of TV food ads viewed by Hispanic youth and adults by category (see [Figure 10](#)) largely mirrored the distribution of Spanish-language TV ad spending by category. Cereals was the most

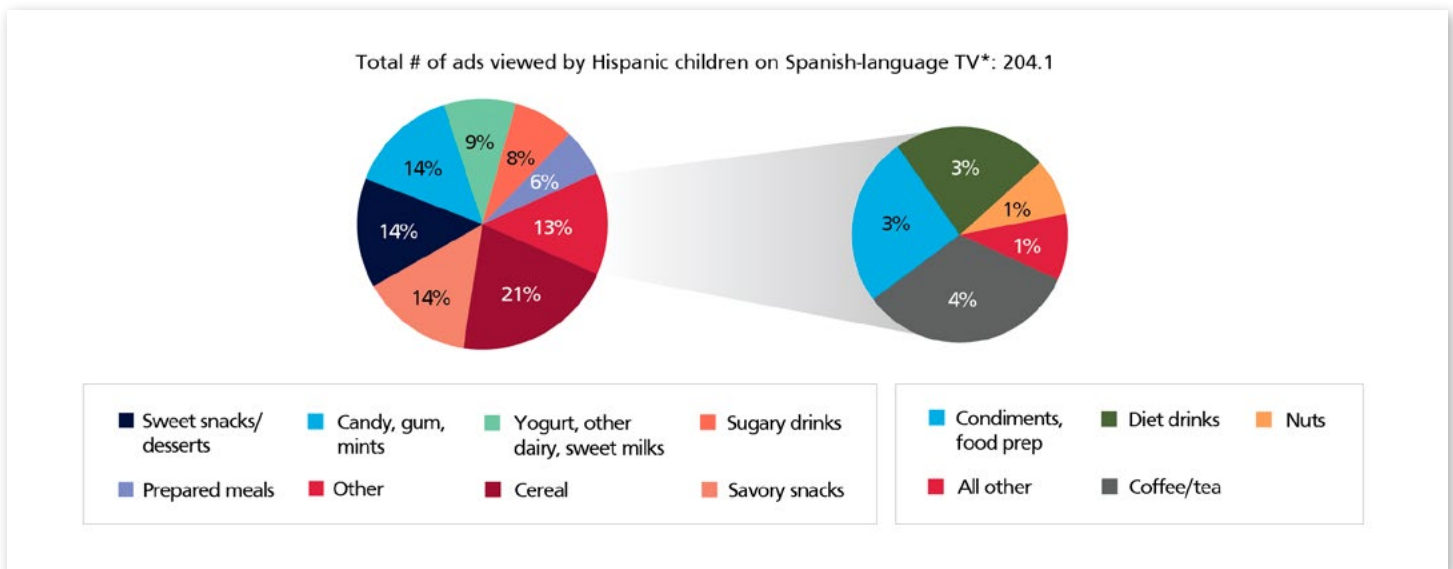
advertised food category, followed by savory snacks, sweet snacks, and candy and gum/mints. Together, these four categories represented 63% of TV food ads viewed by Hispanic viewers in all age groups and 62% of Spanish-language TV food ad spending.

Yogurt, sweetened milks, and other dairy ranked fifth in number of ads viewed by Hispanic individuals in all age groups (9-10% of ads viewed), compared to sixth in ad spending (7% of ad spending). In contrast, sugary drinks represented a smaller proportion of food ads viewed by Hispanic individuals (7-8% for all age groups) compared to its proportion of ad spending on Spanish-language TV (14%).

Exposure to TV ads by Black versus White viewers

Cereal was the most widely viewed food and beverage ad category for Black and White youth in all age groups in 2021, followed by candy and gum/mints, prepared meals, savory snacks, sweet snacks, and

FIGURE 10. PROPORTION OF TV ADS VIEWED BY HISPANIC CHILDREN* ON SPANISH-LANGUAGE TV BY CATEGORY: 2021



*Ads viewed by Hispanic children (6-11 y) on Spanish-language TV only. Proportions of ads viewed did not differ significantly by age group ($\pm 1\%$ or less).

Source: Analysis of 2021 Nielsen data (Nielsen Global Media)

Results

sugary drinks (see **Figure 11**). These six categories contributed approximately 79% of TV ads viewed across all groups.

The proportion of food and beverage ads viewed by category were similar to the proportions of TV ad spending by category, with a few exceptions. Prepared meals ranked third in ads viewed by youth compared to seventh in TV ad spending, whereas sugary drinks ranked second in TV ad spending, but sixth in ads viewed by Black and White youth. Diet drinks also ranked lower than expected in ads viewed by youth (4% of TV food ads viewed) compared to the amount spent to advertise these products (9% of total TV ad spending).

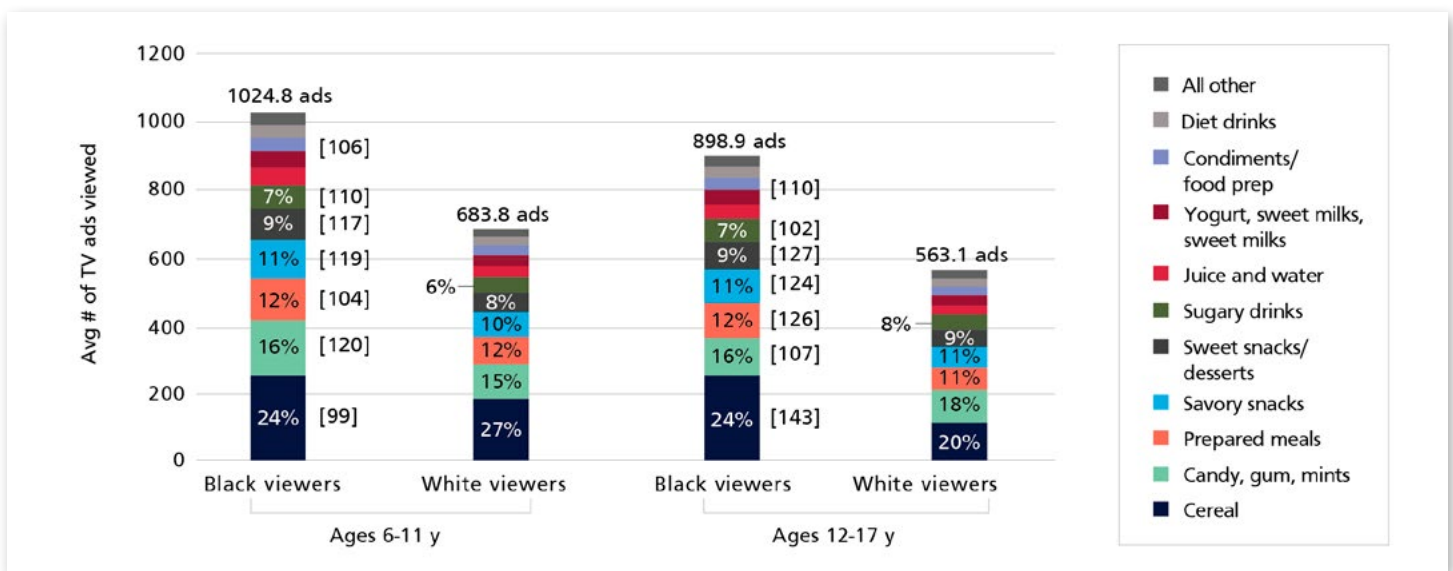
As noted earlier, Black preschoolers, children, and teens continued to view more food and beverage ads than their White peers (32%, 50% and 60% more,

respectively). In addition, these differences were higher than would be expected after accounting for the greater amount of time that Black youth spend watching TV, indicated by Black:White targeted indices of 113, 109, and 121, respectively.

However, differences in ads viewed by Black and White youth varied by category. In 2021, as in 2017, categories with the highest Black:White targeted indices for preschoolers and children included candy and gum/mints, savory snacks, and sweet snacks (targeted indices > 115). Categories that did not appear to disproportionately target Black preschoolers and children in 2021 included cereal, juice and water, and diet drinks (all targeted indices ≤ 103).

In 2021, cereals, savory snacks, and sweet snacks had Black:White targeted indices higher than 120 for teens, similar to differences found in 2017. Black teens also saw disproportionately more ads for juice and plain water and prepared meals in 2021; whereas sugary drinks and diet drinks appeared to no longer target Black teens (targeted indices ≤ 103).

FIGURE 11. ADS VIEWED BY BLACK VS. WHITE YOUTH BY CATEGORY: 2021



*[Numbers in brackets] = targeted indices (ratio of ads viewed/ratio of TV viewing times for Black:White viewers*100)

Source: Analysis of 2021 Nielsen data (Nielsen Global Media)

Results

TARGETED MARKETING CAMPAIGNS

Our review of targeted marketing campaigns (see [Appendix C](#)) identified numerous examples of marketing that appeared to target Hispanic and Black consumers, including multicultural youth. A small number of companies explicitly stated a business opportunity for their ethnically targeted marketing. For example, Mars joined the National Hispanic Corporate Council to “effectively serve the growing Hispanic market.”²⁸ PepsiCo noted that 14% of Rockstar consumers are Hispanic, more than 50% of Cheetos’ sales “are in the Hispanic base,”^{29,30} and that Lipton “has a high skew of African American consumption.”³¹ The company also noted that Pepsi’s all-Black sales force in the Jim Crow South laid the foundation for engaging with the trillion-dollar Black consumer market.³²

Culturally relevant campaigns

Although not stated explicitly, many companies also appeared to follow the guidance of marketing experts that, “The path for growth is towards the multicultural youth.”³³ We found many campaigns designed to appeal to multicultural youth through music, sports, “extreme” flavors, and other youth-oriented themes. Many of these campaigns also appeared to recognize that multicultural youth should not be treated as one homogeneous group. As noted by marketing experts, Black youth have traditionally shaped American pop culture, but are now looking for new ways to celebrate their “African roots,” and Hispanic youth also want to connect with their Latino culture.³⁴

In our analysis, music was the most common technique used by food and beverage brands to appeal to multicultural youth, with campaigns incorporating hip-hop (Gold Peak, VitaminWater, Sprite, Cheez-It, Pepsi, and Lipton) and Latinx (Cheetos, Pepsi, Rockstar, and Red Bull) music celebrities. Mtn Dew/Ruffles, Gatorade, and Tyson also promoted sports-related sponsorships supporting

Black colleges, while LifeWtr sponsored a Black Art Rising Initiative to “immortalize Black protest art.” Notably, Coca-Cola and PepsiCo brands represented two-thirds of the ethnically targeted music and sports campaigns identified.

Many product introductions also exhibited multicultural appeal, including Minute Maid Aguas Frescas, Fanta Dragon Fruit Zero Sugar, Sprite Extra Spice and Hit of Ginger flavors, Cheez-It X Pandora “sonically aged cheese snack using music from iconic hip-hop artists,” Old El Paso Takis Fuegos taco shells, and Rockstar Punched Aguas Frescas flavors. Pop-Tarts and Perrier both offered limited-time Dia de Los Muertos packaging, while Kit Kat packages featured black female music artists, and Sprite introduced a streetwear collection tied to its Hit of Ginger flavor.

A few brands also introduced campaigns to appeal to multicultural women and/or moms, such as Coca-Cola’s partnership with Essence Festival of Culture, Kellogg’s “On Moms’ Tables Aquí y Allá” to “capture bicultural Latina moms’ emotional relationship with cereal brands”, and Special K’s partnership with La La Anthony, a Black health and wellness celebrity, and Black Girls RUN!

Corporate social responsibility initiatives

Companies and brands also promoted numerous cause-related initiatives to support communities of color. Cause-related campaigns often featured youth-oriented giving, such as scholarships to Hispanic and/or Black youth (Mtn Dew/Ruffles, PepsiCo), and support of youth sports (Frosted Flakes), minority youth hiring (Ben & Jerry’s, PepsiCo), and food insecurity causes (Coca Cola company, Old El Paso, Special K). Campaigns also supported Black and Hispanic cultural causes, including the National Museum of the American Latino (Coca-Cola), Memphis Music Initiative (Hershey), Hispanic Heritage Foundation (Perrier), Black Art Rising (LifeWtr), mentorship for Black filmmakers (M&Ms), and the Pepsi Music Lab to support future hip-hop artists.

PepsiCo brands often supported a cause in connection with its youth-oriented promotions. For example, the company established a fund to support Hispanic communities together with its “Deja tu Huella” Cheetos Flamin’ Hot campaign to inspire Latinos to leave their mark on the world, both literally and figuratively” featuring Bad Bunny (Latino music celebrity).³⁵ According to a PepsiCo spokesperson, “By embedding the brand into the Hispanic cultural conversation, Cheetos re-ignited its relationship and effectively reversed penetration erosion.”³⁶

Results

Approximately two-thirds of company and brand corporate responsibility initiatives were campaigns centered on social justice and/or diversity, equity, and inclusion (DEI). These initiatives also represent a form of ethnically targeted marketing. In the wake of increased public attention to issues of DEI, consumers are asking brands to demonstrate their commitment to these values. In a 2021 consumer poll, 75% agreed that they're more likely to purchase from a brand "when people like them are represented in their ads."³⁷ They also considered "diverse imagery" and "inclusive language" to be the most essential components of a marketing message. Inclusivity in advertising increases short-term sales and long-term brand equity, and young people are even more sensitive about the topic.³⁸

A few food and beverage marketing campaigns directly supported social justice causes. For example, Coca-Cola Company sponsored a "Together We Must" Virtual Dinner Series with resources for families to have social justice conversations over the holiday season, challenged state voter suppression laws, and made grants to the NAACP, National Center for Civil and Human Rights, and Equal Justice Initiative. Its Sprite brand also launched a campaign to "Inspire multicultural youth to make their voices heard via inclusive voter education program with help from cultural tastemakers." PepsiCo brands,

Doritos and Bubly, supported "Black Nonprofit Changemakers" and the Center for Black Equity; while Mars' Kind brand partnered with the National Collaborative for Health Equity.

The most common type of corporate responsibility campaign supported DEI in multiple domains. Some specifically focused on diverse representation in media and marketing communications. For example, 20 companies (including Dannon, Ferrara, General Mills, Mars, Nestle, and Tyson) pledged to spend at least 20% of the annual media budgets with Black-owned media companies; Mondelez joined the Unstereotype Alliance to "eradicate harmful stereotypes in media and advertising content"; and Tyson announced that it would utilize Mindshare's Impact Index to "ferret out social media content that is toxic to minority consumers." Pearl Milling Company (formerly Aunt Jemima) and Ben's Original (formerly Uncle Ben) changed their names and brand characters to foster more inclusive brand images; while Kind KIDS promised more diverse and inclusive representation on its product packages.

Companies' DEI campaigns also frequently supported minority-owned suppliers (Mars), Black-owned restaurants (Kraft Heinz, PepsiCo), and retailers and other businesses in multicultural communities (PepsiCo). Describing its Juntos Creemos grants to minority-owned businesses, a Pepsi representative noted, "If your brand is in a position to extend special deeds like offers, discounts or contributions, those actions contribute enormously in ensuring consumers will remember your brand for being there and doing good." Thus, food and beverage companies incorporate cause-related initiatives benefiting communities of color into their ethnically targeted marketing plan. However, as with traditional advertising, few of these brands offer nutritious products that would contribute positively to the health of people of color.

Discussion

The social, political, and economic context in which we analyze these findings has changed markedly since the Rudd Center released its previous report on targeted marketing to Black and Hispanic youth in 2019.³⁹ The disproportionate negative impacts of the COVID-19 pandemic on communities of color in the U.S. has intensified the need to monitor contributors to health disparities, including targeted marketing of unhealthy foods to Black and Hispanic consumers.⁴⁰

There have also been major shifts in media viewing habits and TV advertising by U.S. companies across all product categories, not just the food and beverage industry.⁴¹ In addition, young people have increased their media viewing on mobile devices and non-commercial streaming services, which are not measured in these data.⁴²⁻⁴⁵ As a result, companies have increased the proportion of advertising budgets allocated to digital versus TV advertising.⁴⁶ Market researchers have suggested that the pandemic accelerated viewers' shift from traditional TV viewing to other screens, and predict that ad spending will continue to move to non-traditional media to follow viewers.⁴⁷

Targeted marketing designed to appeal specifically to Hispanic and Black consumers acknowledges their

value as customers and is not problematic in and of itself. Companies are responsible to their investors to continually increase sales and profits. It appears from our analysis of public statements about targeted marketing campaigns that they are trying to appeal to an increasingly diverse customer base, including Hispanic and Black consumers. Hispanic consumers contributed more than one-half of total U.S. population growth from 2010 to 2020 and have a projected \$2.6 trillion in buying power.⁴⁸ Black households represent another estimated \$1.4 trillion in spending, and according to research by Nielsen, "Black consumer choices have a 'cool factor' that has created a halo effect, influencing not just consumers of color but the mainstream as well."⁴⁹ According to 2020 census data, individuals who identify as non-Hispanic White now comprise less than 50% of youth under age 18.⁵⁰

However, nearly all brands targeted to Black and/or Hispanic consumers in this report promote unhealthy products. Underlying food and beverage targeted marketing practices are business models in which companies profit from marketing of nutritionally poor foods and beverages, reinforced by processes and outcomes of structural racism (e.g., residential segregation and income and wealth inequities) that shape the food environment in which people live.⁵¹ This food environment contributes to greater exposure to unhealthy food marketing by Black and Hispanic consumers and the resulting negative health effects. Therefore, the ethnically targeted marketing to Black and Hispanic consumers identified in this report presents a significant barrier to improved public health and health equity.

Advertising spending and TV ad exposure trends

Our findings revealed positive trends in food and beverage advertising as a whole. Food and beverage TV ad spending totaled \$4.0 billion, a decline of 25% from 2017, while ad spending on Spanish-language and Black-targeted TV declined by 18% and 63%, totaling \$411.5 and \$86 million, respectively, in 2021. The number of TV ads viewed by all demographic groups also declined during the same period, including 38% fewer ads viewed by Hispanic teens on Spanish-language TV and 58% to 62% fewer TV ads viewed by children and teens overall. In addition, disparities in TV advertising exposure for Black versus White youth decreased due to greater declines in TV ads viewed by Black

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youth (66-70%) than by White youth (56-58%).

While these food and beverage advertising trends are noteworthy, they cannot not be interpreted as a change in targeted marketing strategies by food companies. For example, declines in TV food ad exposure mirrored declines in amount of time spent watching TV, including by Black and White youth. Thus, they do not represent a reduction in the frequency of food advertising on TV programming nor reduced advertising targeted directly to Black youth.

We also found evidence of continued disparities in exposure for Black compared to White youth and relative increases in advertising targeted to target Hispanic consumers. In 2021, Black youth and adults viewed 9% to 21% more food and beverage TV ads compared to their White peers, after accounting for amount of time spent watching TV. In addition, food and beverage companies increased their focus on advertising to their Spanish-speaking TV audiences, evidenced by greater ad spending on Spanish-language TV as a proportion of total TV ad spending and less of a reduction in ads viewed by Hispanic youth on Spanish-language TV compared to ads viewed by youth on TV overall.

Targeted advertising by company

Consistent with overall declines in food and beverage advertising, a few of the companies with the most targeted advertising in 2017 had big declines in ethnically targeted ads in 2021. Mars, Hershey, and Keurig Dr Pepper reduced both Spanish-language and Black-targeted TV advertising spending by 70% or more. General Mills reduced its spending on Spanish-language and Black-targeted TV ads, but at a lower rate than the approximately 50% decline in its total TV advertising.

In contrast, some companies increased their advertising budgets, including targeted advertising, from 2017 to 2021. Red Bull (+835%), Ferrero (+139%), Kellogg (+63%), and Mondelez (+54%)

increased total TV advertising spending, as well as TV ads targeting Hispanic and Black consumers. PepsiCo reduced its total advertising and Black-targeted TV ad spending but increased Spanish-language advertising; whereas Dannon, Post, Campbell Soup, Nestle, and Kraft Heinz reduced total ad spending and Spanish-language advertising but increased their Black-targeted TV advertising.

Targeted advertising by category

Brands in unhealthy food and beverage categories continued to disproportionately target Hispanic and Black consumers, and some trends worsened from 2017 to 2021. Five categories (candy and gum/mints, sugary drinks, savory snacks, cereal, and sweet snacks) represented three-quarters of Spanish-language and Black-targeted TV ad spending in 2021, up from approximately one-half of each in 2017.

In 2021 as in 2017, highly advertised sweet and savory snack brands and some types of sugary drinks (regular soda and energy drinks) were more likely to target Hispanic and/or Black consumers. Highly advertised brands in the cereal (primarily high-sugar varieties), yogurt, and sweetened milk categories were more likely to target these groups in 2021 than in 2017. Relative to White youth, Black children and teens viewed disproportionately more ads for savory snacks and sweet snacks, Black children viewed more ads for candy and gum/mints, and Black teens viewed more cereal ads.

In contrast, healthier drink brands (100% juice and plain water brands) continued to be less likely to target Hispanic and/or Black consumers. These categories had no Spanish-language TV advertising in 2021, and ad spending declined by 82% on Black-targeted TV (compared to a 16% decline in total TV ads for the category). Moreover, there were no highly advertised fruit or vegetable brands in 2021, compared to just one fruit brand in 2017, and there was no advertising for these categories on Spanish-language or Black-targeted TV.

We did identify some positive findings in targeted advertising spending by category. In 2021, highly advertised brands in the candy and gum/mints, diet soda, and other sugary drink categories (sports drinks, flavored waters) were less likely to target Hispanic and/or Black consumers than in 2017. Brands in the nut category were more likely to target these groups in 2021. Despite large increases in total TV advertising spending for sugary drinks and diet drinks, ad spending for these categories declined on Spanish-language TV and increased at lower rates on Black-targeted TV. Moreover, in total (across all brands) Black teens no longer viewed disproportionately more total TV ads for

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sugary drinks or diet drinks compared to White teens in 2021, as they had in 2017. In addition, although water brands overall were less likely to target Black and Hispanic consumers, two individual unsweetened water brands (Evian and AHA) advertised on Black-targeted TV programming in 2021. This finding contrasts with 2017, when no water brands advertised Black-targeted or Spanish-language TV.

Targeted marketing campaigns

We identified numerous examples of marketing campaigns targeted to multicultural youth incorporating hip-hop and Latinx music celebrities and other youth-oriented themes, as well as cause-related marketing with donations and collaborations with non-profits to benefit communities of color and foster goodwill for food and beverage brands. Notably, Coca-Cola and PepsiCo brands were responsible for the majority of targeted marketing campaigns we identified.

The large number of such marketing campaigns indicates that food and beverage companies recognize the growing importance of these consumers. Although this increased focus on diversity, equity, and inclusion in marketing and cause-related marketing campaigns, demonstrate companies' commitment to benefiting communities of color, these campaigns almost exclusively promoted unhealthy products that may negatively impact the health of young people of color.

LIMITATIONS

This analysis provides a comprehensive picture of TV advertising expenditures and exposure data available from Nielsen, the most widely used industry source to monitor companies' media plans. However, we did not have access to food industry proprietary documents, such as privately commissioned market research, media and marketing plans, and other strategic documents. Therefore, we do not attempt to interpret companies' goals or objectives for their targeted marketing.

Our company and brand-level analyses detail advertising by 19 food and beverage companies, which represented 75% of all food TV advertising spending, 79% of Spanish-language TV ad spending, and 82% of Black-targeted TV ad spending. Moreover, these companies contributed more than 75% of TV ads viewed by all children and teens, as well as by Black children and teens, and approximately 80% of food ads viewed by Hispanic children and teens on Spanish-language TV. Therefore, the companies in our analysis were responsible for the majority of TV advertising for food and beverages, including targeted advertising, in 2021.

A related limitation is that we only analyzed targeted TV advertising. TV represented 81% of food and beverage company advertising expenditures in 2021, but children and teens are watching less TV and increasing their use of other types of media, such as streaming video and mobile devices.^{52,53} In addition, food companies frequently target youth with other types of marketing, including sponsorships, social media, and retail promotions.⁵⁴ We document examples of other types of targeted marketing campaigns in public statements made by company spokespeople (see [Appendix C](#)). Furthermore, we provide social media targeted marketing examples (see [Appendix D](#)) from companies in our analysis.

Finally, we did not conduct a nutrition analysis of products offered by targeted brands. However, previous analyses of the most highly advertised food and beverage categories have demonstrated the poor nutritional quality of the majority of advertised products in the snacks⁵⁵ and cereal⁵⁶ categories. Further, nutrition experts consistently counsel against overconsumption of sugary drinks and candy. Yogurt, milk, and nuts were the only generally healthy categories with any brands targeted to Hispanic and/or Black consumers, although advertised yogurts tend to be high in added sugar and the targeted milk brands were all sweetened products (e.g., Nesquik, Nido, Carnation Breakfast).⁵⁷

RECOMMENDATIONS

This report highlights the need for concerted action to reduce ethnically targeted marketing of unhealthy food and beverages and to encourage companies to promote culturally appealing, healthy foods. Companies with diverse portfolios of both healthy and unhealthy brands continue to disproportionately target Black and Hispanic consumers with ads for unhealthy sweet and savory snacks, regular soda, and energy drinks. Remarkably, out of the 19 companies in this analysis, just one advertised a fruit or vegetable brand in 2021 (Dannon Earthbound Farms salad) and only \$5,000 was spent to advertise it (out of \$3.4 billion in total ad

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spending). Moreover, we found no advertising for fruits or vegetables on Spanish-language or Black-targeted TV.

Key actors within industry, the public health community, and policy makers must take responsibility for reducing unhealthy marketing that targets and disproportionately impacts Hispanic and Black consumers. Making healthier choices the easiest, most affordable, and most socially acceptable options would advance racial equity and mitigate the harms of structural racism.⁵⁸

Industry, including food and beverage manufacturers and media companies, must reduce unhealthy food marketing to children and youth.

Due to greater exposure to media and unhealthy food marketing, improvements in food advertising targeted to all children and teens would have the greatest benefit for Black and Hispanic youth.

- Food and beverage manufacturers have pledged to reduce unhealthy food advertising to children through the CFBAI industry self-regulatory program. However, improvements are needed to address documented loopholes that allow participating companies to continue to advertise nutritionally poor products to children.⁵⁹⁻⁶² For example, CFBAI should cover advertising to children up to age 14, and ideally age 17, and expand the definition of “child-directed marketing” to include the broad range of marketing aimed at children.^{63,64}
- CFBAI participants should strengthen nutrition standards to identify healthier products that may be advertised to children,⁶⁵ including:
 - Utilize standards established by independent experts, such as nutrient profiling systems used to regulate food marketing in the United Kingdom,⁶⁶ Chile,⁶⁷ and Mexico.⁶⁸
 - Replace separate nutrition criteria for 19 different categories with standardized criteria for all foods and all drinks.
 - Increase the number of categories that should not be advertised to children at all, including all drinks sweetened with added sugar and/or non-nutritive sweeteners and sweet snacks.
- Candy and nutritionally poor snack food brands - food categories that have been shown to directly contribute to obesity and other diet-related diseases among youth – should stop targeting advertising to all young people under 18, including multicultural youth.
- Media companies that own programming with large audiences of children and/or teens should take action to improve the nutritional quality of foods advertised during child and tween programming.
 - There is precedent for media companies to take action. The Walt Disney Company sets nutrition standards for products that can be advertised on its child-targeted media that are stricter than the CFBAI food-industry program standards.⁶⁹
 - Other children’s media companies, such as Viacom (Nickelodeon, Nick-at-Nite) and Warner Bros (Cartoon Network), could require that all companies advertising on their children’s programming follow CFBAI nutrition criteria.

Food and beverage and media companies must also address unhealthy food marketing disproportionately targeted to Black and Hispanic consumers.

- Food and beverage companies should demonstrate their commitment to Black and Hispanic communities by devoting their enormous resources to culturally relevant and cause-related marketing campaigns for nutritious products that would contribute positively to public health.
- Industry commitments to increase sales and marketing of healthier products – such as the Partnership for a Healthier America⁷⁰ and the American Beverage Association’s Balance Calories Initiative⁷¹ – should address marketing of nutritionally poor products in Black- and Hispanic targeted media and in communities of color.
- Media companies that own programming with large audiences of Hispanic and/or Black youth should also take action to improve the nutritional quality of foods advertised during targeted programming.
 - For example, companies could establish standards for the amount of healthy versus unhealthy foods advertised or provide

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lower rates to advertise the healthiest products that do not currently advertise there (e.g., fruits and vegetables).

Public health advocates, researchers, and community and grassroots organizations can increase public awareness of the vast amounts of unhealthy food and beverage marketing that disproportionately targets communities of color and call for change.⁷²

- Youth-led initiatives should be encouraged, such as Operation Good Food and Beverages, a campaign by and for Black youth, launched an initiative in July 2022 to promote healthier food and beverage options and counteract widespread unhealthy food marketing. In a petition to the National Restaurant Association, the Initiative encouraged the Association to promote healthier menu options in Black communities.⁷³
- Shareholder organizations can also influence corporate behavior by organizing shareholder actions and participating in shareholder meetings to demand that corporate leadership address targeted marketing practices.^{74,75}
- Countermarketing campaigns to expose corporate motives and undermine ethnically targeted marketing practices of companies can help reduce the demand for unhealthy products and increase corporate accountability.⁷⁶
- Additional monitoring is also needed to examine ethnically targeted marketing in communities and in digital media, which cannot be measured using traditional syndicated market research data.

Policymakers and advocates can pursue or support legislation or regulation to address unhealthy food and beverage marketing for all consumers.⁷⁷

Policy options at the local and state level:

- **Sweetened beverage taxes.** Municipalities, including Albany, Berkeley, Oakland, and San Francisco, CA; Boulder, CO; Philadelphia, PA; and

Seattle, WA have enacted excise taxes on sweetened drinks, which offset manufacturers' and retailers' ability to set low prices for these products and allow tax revenues to be invested in communities disproportionately impacted by sugary drinks.⁷⁸

- **Laws and policies to further restrict marketing of unhealthy products in schools including digital marketing.**^{79,80} California, Maine, and Rhode Island passed laws to further restrict marketing of unhealthy products in schools (going beyond the USDA requirements), and local school districts have implemented stricter requirements through their local wellness policies.
- **Address marketing targeting children.** The 2021 New York State Predatory Marketing Prevention Act expands New York States' definition of misleading or deceptive advertising to include unhealthy food marketed to children.⁸¹

Policy options at the federal level:

- Eliminate unhealthy food and beverage marketing to children as a tax-deductible corporate expense.⁸²
- Require the Federal Trade Commission to publish an updated report on food marketing expenditures aimed at children and adolescents (previously published in 2008 and 2012) and focus on three new priorities: targeted marketing, digital food marketing, and data practices targeting children regardless of platform type.⁸³

CONCLUSION

This report documents that food and beverage companies continue to disproportionately target Black and Hispanic consumers with TV advertising of almost exclusively unhealthy packaged food and beverage categories. Most companies in this analysis have healthier brands in their portfolios, including plain water, low-sugar cereals, yogurt and plain dairy, fruits and vegetables that could be promoted. Therefore, choosing to disproportionately advertise their least nutritious brands, including sugary drinks, candy, chips, and high-sugar cereals, to Black and Hispanic consumers, must be weighed against the resulting costs to communities, especially considering the impact of the COVID-19 pandemic and structural racism that limits access to healthy, affordable, and culturally appealing food in many communities.

Methods

Targeted marketing is the practice of designing marketing programs that appeal specifically to a group of consumers whom a company has identified as particularly attractive for their business,⁸⁴ also known as “culturally-specific” content or marketing.

Methods developed by consumer behavior researchers to identify targeted marketing include measuring differences in the concentration of ad placements across different types of media (e.g., Spanish-language or Black-targeted media) and differences in exposure by viewers in different demographic groups, as well as identification of customized advertising content (e.g., cultural themes, actors).⁸⁵

In this report, we detail marketing by food and beverage companies targeted to Black and Hispanic consumers, focusing on TV advertising spending and TV advertising viewed by preschoolers (2-5 years), children (6-11 years), and teens (12-17 years) in 2021. We utilized the same methods and Nielsen syndicated market research data as our previous targeted advertising report⁸⁶ to examine changes from 2017 to 2021. We also include an examination of company statements about their targeted marketing campaigns.

SCOPE OF ANALYSES

We analyzed Nielsen data for all food and beverage companies listed in Nielsen’s “Food and Food

Products” and “Confectionary, Snacks and Soft Drinks” categories. Restaurants were excluded from this report, as we previously reported results for the category in our Fast Food FACTS 2021 report.⁸⁷

We conducted additional analyses of 19 food and beverage companies that spent \$100 million or more on total advertising in 2021 ($n=15$), as well as members of the Children’s Food and Beverage Advertising Initiative (CFBAI)⁸⁸ that did not meet this spending threshold ($n=3$) and one additional company that was included in our 2019 targeted marketing report.⁸⁹ We also identified highly advertised brands from the above companies that spent \$500,000 or more on television advertising in 2021 ($n=228$) for further analyses.

We assigned all brands to one of the following categories: 1) food products (baby food, candy, cereal, coffee/tea, company, condiments/food preparation, fruits, gum/mints, meat, milk – plant-based, milk-sweetened, nuts, other dairy, prepared meals, savory snacks, sweet snacks/desserts, vegetables, and yogurt); and 2) beverages (diet soda, energy drinks, juice, other diet drinks, other sugary drinks, regular soda, soda brands, and water).

ANALYSES OF SYNDICATED MARKET RESEARCH DATA

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

Measures

The Nielsen data quantified media spending by company and brand, including amount spent to advertise on targeted TV networks (i.e., Spanish-language and Black-targeted TV). Nielsen data also provided the number of TV advertisements viewed (i.e., exposure) by Black,

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White, and all preschoolers, children, teens, and adults; and exposure to advertising on Spanish-language TV by Hispanic preschoolers, children, teens, and adults. All data were collected for advertising in 2021.

Targeted television networks

All advertising on Spanish-language TV was considered to be targeted to Hispanic audiences. Spanish-language TV distributors included Azteca, Discovery en Español, Discovery Familia, ESPN Deportes, Estrella TV, FOX Deportes, Galavisión, Universo, Telemundo, UniMás, Univisión, and Univisión Deportes.

Networks were categorized as Black-targeted TV if more than 50% of a network's audience self-identified as Black according to Nielsen MarketBreaks in 2017. Black-targeted TV distributors included BET, NBA TV, TV One, and VH1.

Advertising spending

Nielsen tracks amount spent to purchase advertising in a variety of media. These data provide a measure of advertising spending. We licensed advertising spending data for all food and beverage categories for 2021 and report these numbers by brand, company, and category. When available, we compare results to 2017 results reported in our previous targeted marketing report.⁹⁰

We report the following advertising spending measures:

- **Total ad spending** includes the amount spent on all media tracked by Nielsen including TV (including Spanish-language TV), digital, radio, magazines, newspaper, and outdoor advertising.
- **Total TV ad spending** includes advertising expenditures on network, cable, syndicated, and spot (local) TV.
- **Spanish-language TV spending** includes advertising expenditures on all Spanish-language TV networks.

- **Black-targeted TV spending** includes advertising expenditures on all Black-targeted TV networks (i.e., those with an audience comprised of more than 50% Black viewers).

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

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

TV viewing times

We licensed TV viewing data from Nielsen to calculate average TV viewing times for preschoolers (ages 2-5), children (ages 6-11), teens (ages 12-17), 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 and between Black and White youth in the same age group. These numbers were calculated by dividing TV viewing time for preschoolers (2-15 years), children (6-11 years), or teens (12-17 years) by TV viewing time for adults (18-49 years); and by dividing TV viewing times for Black preschoolers, children, and teens by TV viewing times for White preschoolers, children, and teens.

TV advertising exposure

To measure exposure to TV advertising, we also licensed gross rating points (GRP) data from Nielsen for the same time period and companies. GRPs measure the total audience delivered by a company or brand's media schedule. It is expressed as a percent of the population that was exposed to each commercial over a specified period of time across all types of TV programming. It is the advertising industry's standard measure to assess audience exposure to advertising campaigns, and Nielsen Global Research is the most widely used source for these data.⁹¹ GRPs, therefore, provide an objective assessment of advertising exposure.

In addition, GRPs can be used to measure advertisements delivered to a specific audience, such as an age or other demographic group (also known as target rating points or TRPs), which provides a per capita measure to examine relative exposure between groups. For

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example, if a brand had 2,000 GRPs in 2021 for 6- to 11-year-olds and 1,000 GRPs for 18- to 49-year-olds, then we can conclude that children saw twice as many ads for that brand in 2021 compared with adults.

In the exposure analyses, we obtained 2021 GRP data by age group and race. We first obtained total GRPs for the following age groups: preschoolers (2-5 years), children (6-11 years), teens (12-17 years), and adults (18-49 years). These data provide total exposure to national (network, cable, and syndicated) and local (spot market) TV combined. We also obtained GRPs for advertising viewed by Black and White viewers in the same age groups on national TV only, as Nielsen does not provide spot market GRPs by race and age group. To assess exposure by Hispanic viewers to Spanish-language advertising, we use GRP data for advertising that occurred on Spanish-language TV.

Nielsen calculates GRPs as the sum of all advertising exposures for all individuals within a demographic group, including multiple exposures for individuals (i.e., gross impressions), divided by the size of the population, and multiplied by 100. GRPs can be difficult to interpret. Therefore, we also use GRP data to calculate the following TV advertising measures:

Average ads viewed is calculated by dividing total GRPs for a demographic group during a specific time period by 100. It provides a measure of the average number of TV ads viewed by all individuals in that demographic group during the time period measured. For example, if Nielsen reports 2,000 GRPs for 6- to 11-year-olds for a brand in 2021, we can conclude that on average all 6- to 11-year-olds viewed 20 ads for that brand in 2021.

We report average number of ads viewed in 2021 for the following groups:

- Preschoolers (2-5) for all viewers ages 2-5 years (combined national and spot TV)
- Children (6-11) for all viewers ages 6-11 years (combined national and spot TV)

- Teens (12-17) for all viewers aged 12-17 years (combined national and spot TV)
- Black preschoolers (2-5) for all Black viewers ages 2-5 years (national cable, network, and syndicated TV)
- Black children (6-11) for all Black viewers ages 6-11 years (national cable, network, and syndicated TV)
- Black teens (12-17) for Black viewers ages 12-17 (national cable, network, and syndicated TV)
- Hispanic preschoolers (2-5) for all Hispanic viewers ages 2-5 years on Spanish-language networks
- Hispanic children (6-11) for all Hispanic viewers ages 6-11 years on Spanish-language networks
- Hispanic teens (12-17) for Hispanic viewers ages 12-17 on Spanish-language networks

Relative advertising exposure

As GRPs provide a per capita measure of advertising exposure for specific demographic groups, we also used GRPs and TV viewing time to measure relative exposure to advertising between different age groups and between Black and White youth within the same age group.

We first calculated targeted GRP ratios as follows:

- Preschoolers:adult targeted ratio = GRPs for preschoolers (2-5) / GRPs for adults (18-49)
- Child:adult targeted ratio = GRPs for children (6-11) / GRPs for adults (18-49)
- Teen:adult targeted ratio = GRPs for teens (12-17) / GRPs for adults (18-49)
- Black:White preschooler targeted ratio = GRPs for Black preschoolers (2-5) / GRPs for White preschoolers (2-5). This measure only uses national GRPs.
- Black:White child targeted ratio = GRPs for Black children (6-11) / GRPs for White children (6-11). This measure only uses national GRPs.
- Black:White teen targeted ratio = GRPs for Black teens (12-17) / GRPs for White teens (12-17). This measure only uses national GRPs.

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A targeted ratio greater than 1.0 indicates that on average persons in the group of interest (i.e., children in the child:adult ratio) viewed more advertisements than persons in the comparison group (i.e., adults). A targeted ratio of less than 1.0 indicates that the person in the group of interest viewed fewer ads. For example, a child:adult targeted ratio of 2.0 indicates that children viewed twice as many ads as adults viewed.

We then compared these targeted ratios to differences in time spent watching TV for the two groups. The average weekly amount of time spent viewing TV in 2021 was obtained from Nielsen Market Breaks for each age and demographic group in the analysis. The resulting targeted indices provide a measure of disproportionate exposure to TV advertising between the two groups, after controlling for TV viewing time.

We report the following targeted indices:

- **Preschooler:adult targeted index** = $[\text{GRPs for all preschoolers (2-5)} / \text{GRPs for all adults (18-49)}] / [\text{TV viewing time for children} / \text{TV viewing time for adults}] * 100$
- **Child:adult targeted index** = $[\text{GRPs for all children (6-11)} / \text{GRPs for all adults (18-49)}] / [\text{TV viewing time for children} / \text{TV viewing time for adults}] * 100$
- **Teen:adult targeted index** = $[\text{GRPs for all teens (12-17)} / \text{GRPs for all adults (18-49)}] / [\text{TV viewing time for teens} / \text{TV viewing time for adults}] * 100$
- **Black:White preschooler targeted index** = $[\text{GRPs for Black preschoolers (2-5)} / \text{GRPs for White children (2-5)}] / [\text{TV viewing time for Black children} / \text{TV viewing time for White children}] * 100$

- **Black:White child targeted index** = $[\text{GRPs for Black children (6-11)} / \text{GRPs for White children (6-11)}] / [\text{TV viewing time for Black children} / \text{TV viewing time for White children}] * 100$
- **Black:White teen targeted index** = $[\text{GRPs for Teens (12-17)} / \text{GRPs for adults (18-49)}] / [\text{TV viewing time for teens} / \text{TV viewing time for adults}] * 100$

A targeted index greater than 100 indicates that on average persons in the group of interest (i.e., children in the child:adult targeted index) viewed more advertisements than persons in the comparison group (i.e., adults) after accounting for differences in TV viewing. A targeted index of less than 100 indicates that the person in the group of interest viewed fewer ads after accounting for differences in TV viewing. For example, a child:adult targeted index of 150 indicates that children viewed 50% more TV ads as adults viewed, after controlling for differences in TV viewing times. If this index is greater than 100, we can conclude that the advertiser likely designed a media plan to reach persons in the group of interest more often than would occur naturally.

Identifying targeted brands

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

The following criteria identified highly advertised brands with TV advertising targeted to Black and/or Hispanic consumers:

- Brands that spent \$100,000 or more to advertise on Spanish-language television were considered to be Hispanic-targeted.
- Brands that spent \$100,000 or more to advertise on Black-targeted networks and had a targeted index^b of 100 or higher for Black versus White teens and/or adults were considered to be Black-targeted.

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

- Brands with a child:adult targeted ratio of .52 or greater and/or

^b On average, in 2021, Black teens watched 61% more hours of television compared with White teens and Black adults watched 70% more television than White adults.

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a teen:adult targeted ratio of 0.40 or greater (i.e., a targeted^c index of 100 or higher) were considered to be youth-targeted.

TARGETED MARKETING CAMPAIGNS

We analyzed company statements about promotional campaigns targeted to Black or Hispanic consumers and/or multicultural youth gathered from press releases on company websites and statements made by corporate representatives in the marketing press from January 2020 to September 2022.

We coded targeted marketing campaigns as follows:

1) Cultural relevance includes references

to unique product offerings or marketing campaigns that aimed to appeal to Black or Hispanic consumers by connecting to their cultures (e.g., through recipes and ethnic product flavors, sports, music); and 2) Corporate social responsibility discusses companies' commitment to social justice and/or diversity and inclusion, and philanthropic efforts to provide support (usually financial) to Black or Hispanic communities (e.g., educational resources, scholarships, food assistance). Examples of marketing campaigns that appeared to target minority consumers included the presence of Black or Hispanic actors/spokespersons and/or use of ethnic cues (cultural symbols and vernacular, support of cultural institutions).⁹²

^c In 2021, children watched 48% fewer hours of television than adults watched and teens watched 60% fewer.

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