

Sugary drink market

Sugary drink market	Definition
Company	The company that produces the product, typically the company listed on the product package or that owns the official website for the product.
Brand	The marketing unit for each beverage. Brands may include products in multiple categories (e.g., Snapple iced teas and Snapple fruit drinks).
Product	Each specific flavor of a brand.
Sugary drink	Any beverage product containing at least one gram of added sugar per 8-ounce serving. In addition to added sugar, sugary drinks may also contain naturally-occurring sugar (e.g., from fruit juice) and/or zero-calorie sweeteners.
Category	The type of beverage (e.g., regular soda, fruit drink). In some cases, products are also classified into subcategories according to sugar content or marketing characteristics (e.g., reduced-sugar drinks, children's drinks).

In this section, we present information about total sales of sugary drinks by category in 2013 and compare them to sales of other categories of drinks that do not contain added sugar. We then describe the companies, brands, and products

included in our analyses of sugary drink and energy drink nutrition and marketing. Our analyses of unhealthy drinks also include diet energy drinks and shots and diet children's drinks that contain artificial sweeteners but no added sugar.

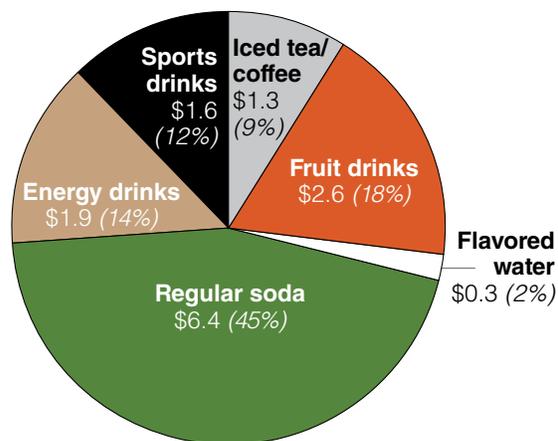
Drink categories	Definition
Regular soda	Carbonated soft drinks that contain two or more grams of added sugar per 8-ounce serving.
Fruit drinks	Fruit-flavored drinks with added sugar that contain no more than 50% fruit juice. These products are also referred to by manufacturers as juice drinks, juice beverages, fruit cocktails, nectars, and fruit-flavored drinks.
Flavored water	Non-carbonated drinks described as "water beverage" on the product packaging, or drinks that include water in the product name. Flavored waters in this analysis all contain added sugar.
Sports drinks	Drinks marketed as intended to accompany physical activity. They contain the phrase "sport drink" on product packaging. Sports drinks in this analysis all contain added sugar.
Iced tea/coffee	Includes ready-to-serve drinks that are primarily described as "iced tea" or "coffee beverage" and typically served cold. Coffee products are new to the 2014 analysis. Iced tea and coffee products in this analysis contain added sugar.
Energy drinks	Caffeinated beverage products labeled by the manufacturer as "energy drink" or "energy supplement." This category includes carbonated, canned varieties, with or without added sugar, as well as concentrated energy shots (sold in 2- to 2.5-ounce containers).
Other drink categories	For comparative purposes in some analyses, we also provide data for drinks that do not contain added sugar, including plain bottled water, 100% juice (including fruit and vegetable juice blends), diet soda and other diet drinks, and light fruit juices.
Diet drinks	Diet drinks contain zero-calorie sweeteners and zero grams of added sugar. These drinks may contain minimal calories from other carbohydrate sources, but most have no calories. Unsweetened zero-calorie products are not included in this category (e.g., flavored seltzer).
Light fruit juices	These drinks contain juice diluted with water, as well as zero-calorie sweeteners, but no added sugar (e.g., V8 Fusion Light, Trop 50). These products are typically advertised as reduced-calorie juice drinks.

Drink subcategories	Definition
Children's drinks	Products that are marketed as intended primarily for children, often sold in 6- to 6.8-ounce drink pouches or boxes. Powdered and liquid children's drink mixes and diet children's products that contain only zero-calorie sweeteners and/or juice as a sweetener, but no added sugar, are also included in this report.
Full-calorie	Full-calorie drinks contain more than 40 calories per 8-ounce serving. Most, if not all, of the sweeteners in these products is added sugar, but they may also contain naturally occurring sugar from fruit juice, as well as zero-calorie sweeteners.
Reduced-sugar	Reduced-sugar drinks are lower-sugar, reduced-calorie drinks with 40 or fewer calories per 8-ounce serving. They often contain zero-calorie sweeteners in addition to added sugar. The drink name may contain the words "light" or "diet," or it may give no indication that the drink is lower in calories.

Beverage sales by category

In 2013, \$14.3 billion of sugary drinks were sold in the United States at supermarkets, convenience stores, drug stores, and mass merchandisers, approximately \$124 spent per household. Regular soda continued to contribute almost one-half of sugary drink sales (see **Figure 1**), followed by fruit drinks, energy drinks, sports drinks, and iced tea/coffee, ranging from 9% to 18% of sugary drink sales. Flavored water made up just 2% of all sugary drink sales.

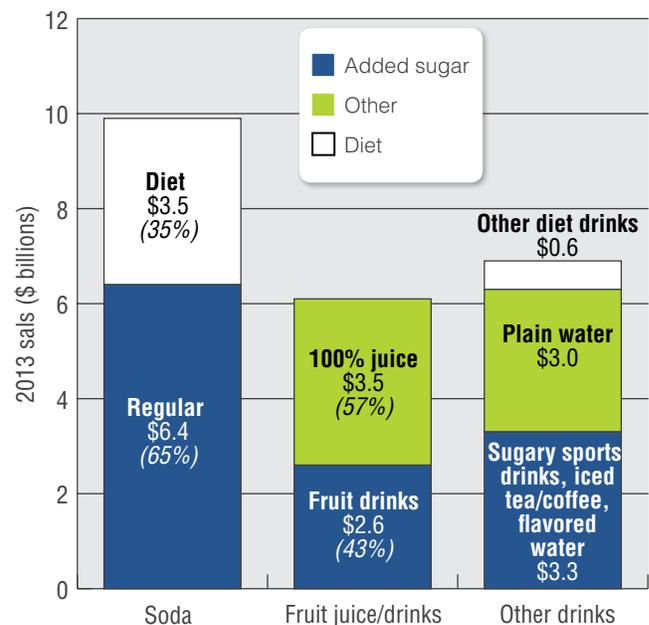
Figure 1. Sugary drink sales in 2013 (\$ billion)



Source: Rudd Center analysis of IRI data (2014)

By comparison, U.S. households spent \$10.7 billion on 100% juice, plain bottled water, diet soda, and other diet drinks in 2013. Soda category sales were split approximately one-third diet versus two-thirds regular soda (see **Figure 2**). This proportion is comparable to the 33% of soda sales for diet products found in 2010.¹ In contrast, dollar sales of 100% juice surpassed fruit drink sales by approximately 35% (although juice also costs more per ounce than fruit drinks). Sales of plain water and diet drinks combined were slightly higher than sales of other non-carbonated sugary drinks (including sports drinks, iced tea/coffee, and flavored water).

Figure 2. Sales of sugary drinks vs. comparison drinks in 2013



Source: Rudd Center analysis of IRI data (2014)

Compared with 2010, total gallons of soda sold (regular and diet combined) declined by 7% in 2013, and gallons of fruit drinks sold went down 3%.² In contrast, gallons sold of other drink categories increased from 2010 to 2013 (for sugary drinks and diet products combined). Flavored water sales increased 7%, sports drinks went up 12%, and ready-to-drink tea and coffee sales increased 21%. Energy drinks had the highest growth, with 41% more gallons sold in 2013 versus 2010. Compared with 2010, gallon sales of bottled water also increased 15%, while fruit juice sales went down 11% in 2013.

Sugary drink products

Our nutrition and marketing analyses examine brands that include sugary drink products, as well as energy drinks and shots and children's products with zero-calorie sweeteners but no added sugar. All brands in these analyses met the following criteria: 1) \$5 million or more in U.S. sales in 2013; 2) children's

drinks with \$1 to \$5 million in U.S. sales in 2013; and/or 3) all brand spending \$250,000 or more on advertising in 2013.

In total, 106 brands and 914 different sugary drink, energy drink, and diet children's drink products from 47 different

companies qualified for our analysis. An overview of companies, brands, products, and 2013 dollar sales by drink category is provided in **Table 3**. Overall, these brands contributed 92% of category sales in 2013, ranging from 83% of fruit drink sales to 99% of flavored water sales.

Table 3. Sugary drink category overview

Category	# of companies with products in category	# of brands	# of products	Average# of products per brand	2013 sales (\$ million)	% of total category sales
Fruit drinks*	30	43	434	10.1	\$2,166.8	83%
Regular soda	10	37	167	4.5	\$5,977.7	93%
Iced tea/coffee	11	16	162	10.1	\$1,261.9	94%
Energy drinks**	11	15	84	5.6	\$1,836.9	95%
Sports drinks	2	2	41	20.5	\$1,601.2	98%
Flavored water*	4	4	26	6.5	\$340.1	99%
Children's drinks**	14	18	162	9.0	\$850.5	34%
Reduced-sugar products	17	26	135	5.2		

*Includes children's drinks

**Includes diet drinks

Source: Product analysis (August, 2014) and Rudd Center analysis of IRI data (2014)

Table 4. Companies with brands in multiple categories*

Company	# of brands	# of products	Regular soda	Fruit drinks	Energy drinks	Iced tea/coffee	Sports drinks	Flavored water
Coca-Cola	22	125	Barq's, Coca-Cola, Fanta, Mello Yello, Pibb Xtra, Seagram's, Sprite	Bright & Early, Calypso, Fuze, Hi-C , Minute Maid, Minute Maid Coolers , Minute Maid Fruit Falls , Simply	Full Throttle, NOS	Fuze, Gold Peak, Honest Tea	Powerade	Vitamin Water
Dr Pepper Snapple Group	18	106	7UP, A&W, Big Red, Cactus Cooler, Canada Dry, Crush, Dr Pepper, IBC, RC Cola, Schweppes, Squirt, Stewart's Fountain Classics, Sundrop, Sunkist, Tahitian Treat, Vernors	Hawaiian Punch , Snapple		Snapple		
PepsiCo	9	106	Manzita Sol, Mtn Dew, Mug, Pepsi, SoBe, Tropicana	SoBe, Tropicana	AMP Energy	Lipton, SoBe	Gatorade	SoBe
Monster Beverage Corporation	5	54		Huberts	Monster, Monster Energy, Java Monster	Peace Tea		
Nestle	4	27		Poland Springs		Nestea, Sweet Leaf, Tradewinds		
Goya	2	6	Malta	Nectars				
Kraft Foods	2	54		Kool-Aid , Capri Sun				Capri Sun
Starbucks	2	38			Starbucks	Starbucks, Tazo		
Arizona	1	43		Arizona		Arizona		Arizona
Johanna Foods	1	9		Ssips		Ssips		
Unilever	1	20		Lipton		Lipton		

*Children's brands noted in bold

Source: Product analysis (August, 2014)

Fruit drinks comprised the largest category with 47% of all products in this analysis ($n=434$) spanning 30 different companies. Sports drinks and flavored water were the smallest categories, with just 4% ($n=41$) and 3% ($n=26$) of all products, respectively. The fruit drink category also had the most brands ($n=44$), while regular soda came in a close second with 37 brands. Sports drinks had the most products per brand, with an average of 20.5, compared to just 4.5 and 6.5 products on average for regular soda and flavored water brands, respectively. Of the products analyzed in this report, 162 (18%) were marketed as specifically intended for children (i.e., children's drinks). The majority of children's drinks (94%) were fruit drinks, while flavored waters contributed the remaining 6%. Fourteen companies offered 17 children's brands.

Eleven companies had brands in more than one drink category (see **Table 4**). They represent 23% of the companies, but 64% of the products ($n=585$) in our analysis. Three companies – Coca-Cola, Dr Pepper Snapple Group, and PepsiCo – were responsible for 46% of brands (22, 18, and 9, respectively) and 37% of the products (125, 106, and 106, respectively) examined. It was not uncommon for brands to offer products in multiple drink categories, such as Arizona (fruit drinks, iced tea, and flavored water), Snapple (fruit drinks and iced tea), and Lipton (fruit drinks and iced tea). However, only Coca-Cola Co. and PepsiCo offered products in every sugary drink category. Notably, Dr Pepper Snapple Group had the most brands ($n=18$), including 16 regular soda brands. Only two other companies had more than 50 products in this analysis: Kraft Foods and Monster Beverage Corporation.

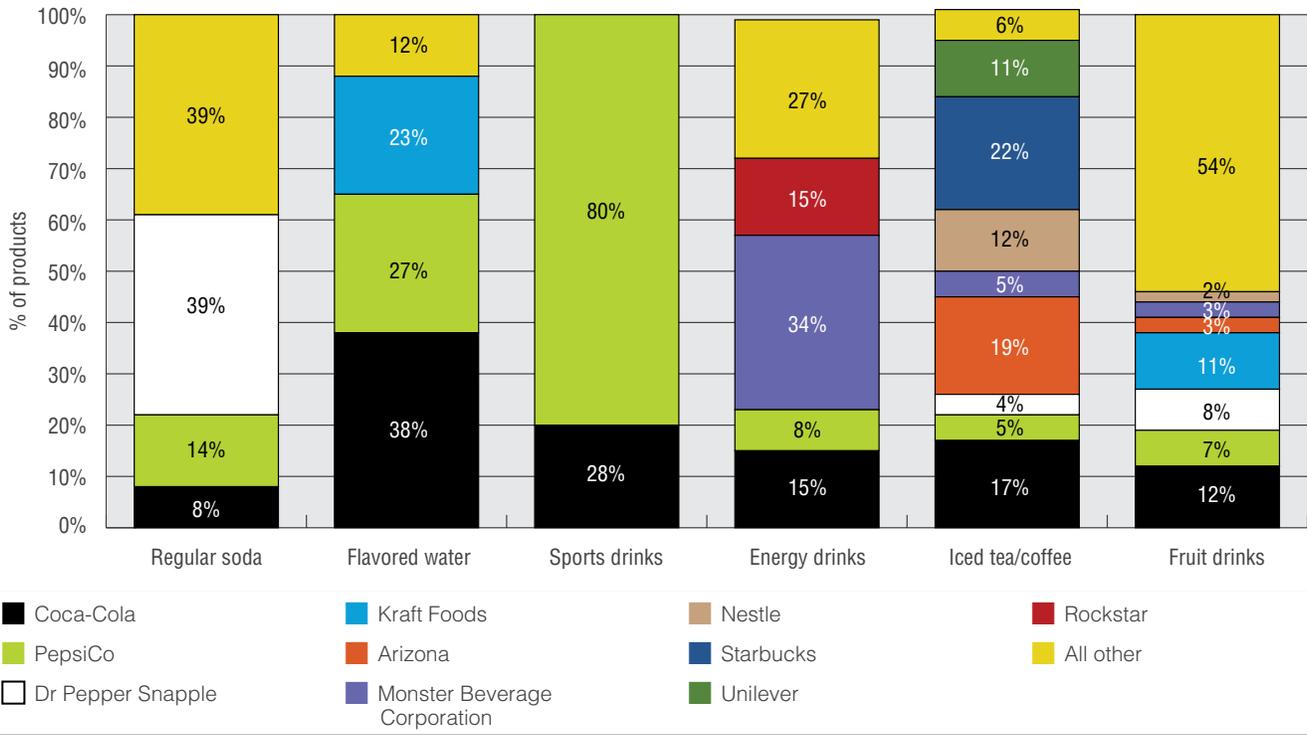
Table 5. Companies with products in one drink category*

Category	Company	Brand	# of products
Regular soda	Jones Soda Co.	Jones	16
Regular soda	Polar Beverages	Polar	15
Regular soda	National Beverage Corp	Faygo, Shasta	14
Regular soda	Reed's	Reed's, Virgil's	13
Regular soda	Novamex	Jarritos	6
Regular soda	Carolina Beverage Corporation	Cheerwine	1
Energy drinks	Rockstar	Rockstar	13
Energy drinks	Innovation Ventures	5-hour Energy	7
Energy drinks	SK Energy Shots	SK Energy	4
Energy drinks	Red Bull	Red Bull	3
Energy drinks	Novartis	NoDoz	2
Energy drinks	NVE Pharmaceuticals	Stacker 2 Xtra	2
Energy drinks	Joseph Co. Intl LLC	West Coast Chill	1
Fruit drinks	Ocean Spray	Ocean Spray	34
Fruit drinks	Langers Juice Company	Langers	30
Fruit drinks	Welch Foods Inc.	Welch's, Welch's Chillers	28
Fruit drinks	Campbell Soup Company	Bolthouse Farms, V8 Fusion, V8 Splash	16
Fruit drinks	Jel Sert Company	Hawaiian Punch (Singles to Go), Mondo Fruit Squeezers	18
Fruit drinks	Sunny Delight Beverages	Sunny D	13
Fruit drinks	Alamance Foods	Happy Drinks	11
Fruit drinks	Houchens Industries	Tampico	10
Fruit drinks	Royal Wessanen	Little Hug Fruit Barrels	10
Fruit drinks	J.M. Smucker Company	RW Knudsen, Santa Cruz Organics	7
Fruit drinks	Jumex Group	Jumex	7
Fruit drinks	BYB Brands, Inc.	Tum E Yummies	5
Fruit drinks	S. Martinelli & Company	Martinelli's	5
Fruit drinks	Turkey Hill Dairy	Turkey Hill	5
Fruit drinks	Vita Coco	Vita Coco Kids	5
Fruit drinks	Newman's Own	Newman's Own	4
Fruit drinks	Stremick's Heritage Foods	Kern's	4
Fruit drinks	Tuscan Dairy Farms	Fruit Rush	4
Fruit drinks	Britvic	Robinsons Fruit Shoot	3
Fruit drinks	Bug Juice	Bug Juice	3
Iced tea/coffee	Karhl Holdings LLC	Two If By Tea	4
Iced tea/coffee	XINGtea	XINGtea	3
Flavored water	Apple & Eve	Apple & Eve Waterfruits	3

*Children's brands noted in bold

Source: Product analysis (August, 2014)

Figure 3. Distribution of products by company within drink category



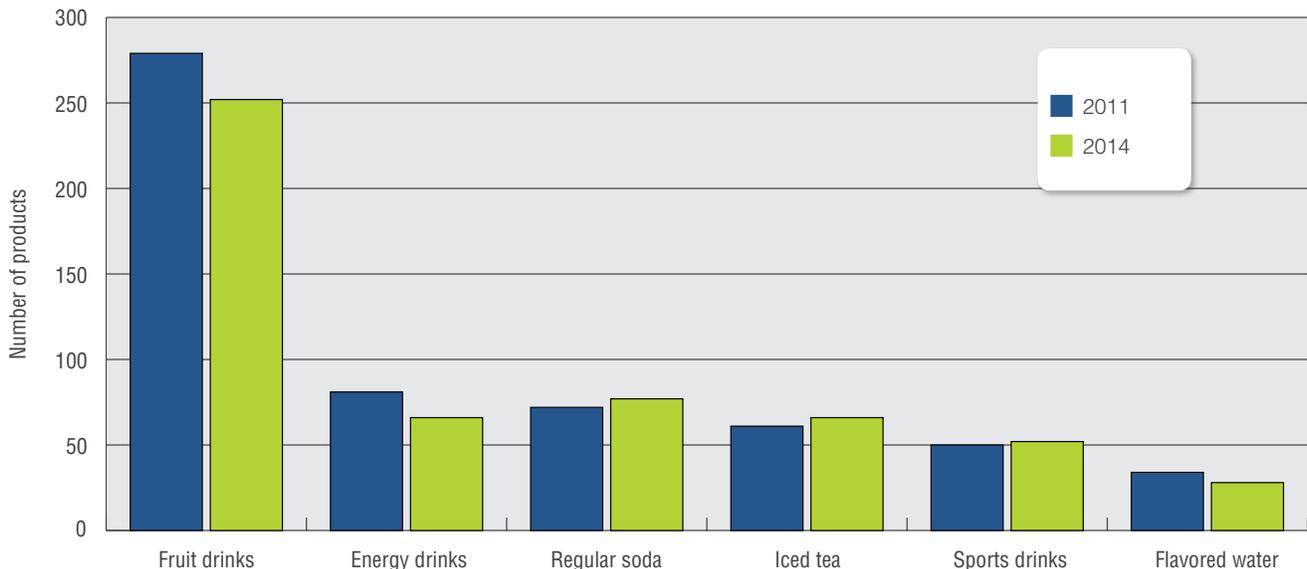
Source: Product analysis (August, 2014)

The remaining 35 companies offered products in just one drink category, including 21 companies with one or more fruit drink brands, seven energy drink companies, six soda companies, two companies with iced tea or coffee brands, and one flavored water company (see **Table 5**). Among these single-category companies, Ocean Spray and Langers Juice Company had the most products (34 and 30 fruit drinks,

respectively). Nearly one-half of the fruit drink brands (11 of 26) from single-category companies were children's brands.

The distribution of products by company within drink category is shown in **Figure 3**. Some categories were dominated by a small number of companies. For example, PepsiCo (Gatorade brand) comprised 80% of products in the sports drink category. In the regular soda and flavored water categories, more than

Figure 4. Number of products per category in 2011 and 2014*



*Includes only brands analyzed in both 2011 and 2014

Source: Product analysis (August, 2014)

50% of products came from just one or two of the three large beverage companies (i.e., Coca-Cola, Dr Pepper Snapple Group, and/or PepsiCo). In contrast, iced tea/coffee and fruit drinks were more diverse categories, with no single company contributing more than one-quarter of products.

From 2011 to 2014, there were few changes in the number of products in each category (see **Figure 4**). Among the companies and brands examined in both years, the number of regular soda, iced tea, and sports drink products increased slightly, while fruit drink, energy drink, and flavored water products declined marginally.

Sugary drink market

Signs of progress

- From 2010 to 2013, gallon sales of soda and fruit drinks (including sugar-sweetened and diet products) declined by 7% and 3%, respectively.
- Gallon sales of bottle water increased by 15% to \$3.0 billion in 2013.

Continued reasons for concern

- Gallon sales of other beverage categories (including both regular and diet products) also increased: flavored water (+7%), sports drinks (+12%), and ready-to-drink tea and coffee (+21%). Sugary drink sales in these categories totaled \$3.3 billion.
- Sugary drinks continued to comprise the majority of sales in most beverage categories. U.S. households spent \$6.4 billion on regular soda in 2013, compared with \$3.5 billion on diet soda, and the proportion of diet versus regular soda sales has not increased since 2010. Spending on sugary sports drinks, flavored water, and iced tea exceeded the amount spent on diet versions of these products by 5.5 times.
- Energy drink sales totaled \$1.9 billion in 2013, and sales continued to climb with a 41% increase in gallons sold versus 2010.

Nutritional content and on-package marketing

In this section, we report sugar, sodium, caffeine, and juice content of sugary drinks and energy drinks and note the inclusion of zero-calorie sweeteners, when information was available. Nutritional content is analyzed by category, brand,

and company. We also examine changes from 2011 to 2014. In addition, we report nutrition-related messages, child features, and promotions appearing on sugary drink packaging.

Obtaining nutrition and ingredient information

Nutritional content	Definition
Nutrition information	Nutrition information analyzed includes calorie, sugar, and sodium content reported on nutrition facts panels. Median and range per serving are reported by brand and category. Nutrition in an 8-ounce serving is reported, unless the product was only available in another size single-serving package (e.g., children's fruit drink pouches, energy shots).
Ingredient information	When available, % juice, caffeine, and zero-calorie sweetener content are reported. This information was obtained from the list of ingredients reported under nutrition facts panels and other information provided by manufacturers on labels and/or websites.
Zero-calorie sweeteners	All nonnutritive sweeteners, including artificial sweeteners (acesulfame potassium, aspartame, sucralose, and neotame), as well as Stevia (also called rebiana or Reb A and described as a natural sweetener).

As in 2011, obtaining nutrition and ingredient information was sometimes difficult and transparency varied greatly by company (see **Table 6**). While all brands examined provided product information on their websites several websites contained no nutrition information. Others gave only basic information such as calories and sugar content, but did not provide ingredient lists, caffeine content, or percent juice information. Further, as in 2011, customer service representatives were often unable or unwilling to provide information over the phone. Thus, the task of gathering

nutrition information was laborious and at times frustrating. Research assistants made numerous calls to companies and several visits to supermarkets, convenience stores, and gas stations to obtain missing information. We also used Gigwalk mobile work marketplace to obtain information on brands that were not available at local stores.

As in 2011, websites for the largest beverage companies contained full nutrition and ingredient information for most of their products. PepsiCo and Coca-Cola maintained

Table 6. Obtaining nutrition information*

Nutrition information obtained easily	
Coca-Cola	Most nutrition information was available on the website.
Dr Pepper Snapple Group	Most nutrition information was available on the website. However, when information was missing, customer service representatives were the most forthright of all companies in providing information over the phone.
PepsiCo	Most nutrition information was available on the website.
Jones Soda Co.	No nutrition information was available on the website, but customer service representatives were very helpful in providing information to researchers.
Alamance Foods (Happy Drinks)	The representative was very helpful, sending nutrition information via e-mail with no questions asked.
Nestle (Nestea)	Most nutrition information was available on the website.
Nutrition information difficult to obtain	
Campbell Soup Company	Nutrition information about V8 products was very difficult to obtain. Ingredient information was not available on the website, and researchers had to make multiple calls for information. Customer service representatives asked many questions about why the information was needed and who needed it. One representative informed us that information should be obtained from the website for liability issues (even though it was not available on the site).
Coca Cola Company (Fanta, Fuze, Minute Maid)	Missing information for these few brands required calls to customer service, where representatives repeatedly told researchers that information was online. Some representatives did check the website themselves, found otherwise, and promised to send questions "to research" for a 7- to 10-day turnaround (but information was never sent). One representative called back insisting all information was online, but could not direct researchers to the appropriate page.
Coca Cola Company (Calypso)	Nutrition information was not available online. Researchers contacted customer service for information, but representatives would only provide information for a few products.
Kraft Foods	Researchers contacted Kraft for information on Kool-Aid and other brands. Representatives stated that product information was not available to them and the best source was the product package itself because formulations may change.
Bug Juice	Nutrition information was not available online. A representative refused to give information over the phone, directing the researcher to three convenience stores in the area. Two stores did not contain the products, and one was no longer in business. A researcher filled out an inquiry form online, but never received the requested information.
Monster Beverage Corporation (Monster Energy)	Comprehensive nutrition and ingredient information was no longer available on the company website (although it had been in 2011). Researchers made many calls to customer service, but representatives were reluctant to share information and made comments such as, "Too much information is being requested" and "Go look at the cans." Representatives also asked researchers many questions, such as who was calling, where from, and why the information was needed.
Rockstar	Comprehensive nutrition and ingredient information was no longer available on the company website (although it had been in 2011). Researchers made various calls to customer service but representatives were difficult to get on the phone. We left messages, yet calls were not returned. Researchers were also told to "check the cans."
National Beverage Corp (Faygo, Shasta)	Representatives insisted that their products were in the stores and would not give information over the phone. However, researchers were unable to find any products during local store visits. This information was eventually obtained for Shasta products by commissioning someone through Gigwalk to visit stores in another state and send pictures of the packages.

* Experiences with specific brands, not the entire company, are denoted in parentheses.

separate nutrition websites with very accessible and detailed information for nearly all products. Dr Pepper Snapple Group customer service representatives were the most forthright in providing information over the phone, a positive change from 2011 when information was requested repeatedly from the company and never provided. However, researchers experienced increased challenges acquiring information about energy drinks. In 2011, Monster Energy and Rockstar had websites that provided complete nutrition and ingredient information about their products. Yet at the time of our analysis in 2014, this information had been removed from their websites. Customer service representatives were largely unhelpful, and information was only gathered after many attempts to speak with different representatives. Further, it was difficult to obtain ingredient information for most fruit drink brands.

Nutritional content by category

In this report, we present nutrition information for 914 drink products (see **Appendix B** for nutrition by product). **Ranking Table 1** provides nutrition information by brand and drink

category. We also analyzed changes in nutritional content for 541 products from brands included in our 2011 analysis, including new products and some products that were not included in our 2014 product list due to low brand sales.

Table 7 summarizes calorie and sweetener content of drinks in each category in 2014. Sugar-sweetened regular soda, fruit drinks, and energy drinks had the highest median calorie content at 100 to 110 calories and 24 to 29 grams of sugar per 8-ounce serving. In contrast, flavored water, sports drinks, and iced tea/coffee products contained a median of 10 to 14 grams of sugar and 40 to 66 calories per serving. In addition to added sugar, a large number of products also contained zero-calorie sweeteners, ranging from 10% of regular soda products to 50% or more of flavored water and sugar-sweetened energy drinks.

Regular soda

Median sugar for the majority of soda brands ranged from 27 to 31 grams. Jones full-calorie sodas had the most sugar of all brands in this report, with a median of 43 grams sugar

Table 7. Sugary drink nutritional content by category in 2014*

Category	# of products	Median calories (kcal)	Median sugar (g)	% reduced-sugar products	% of full-calorie products with 0-calorie sweeteners**
Regular soda	167	110 (30-190)	29 (8-48)	5%	10%
Energy drinks	50	106 (7-148)	23 (1-43)	24%	51%
Fruit drinks	418	100 (5-217)	24 (1-57)	15%	20%
Iced tea/coffee	162	66 (17-169)	14 (2-28)	15%	33%
Sports drinks	41	50 (20-53)	14 (5-14)	29%	0%
Flavored water	26	40 (30-48)	10 (8-13)	62%	0%

*Includes only products with added sugar

**% of products reported by companies

Source: Nutritional content analysis (August, 2014)

(and 165 calories) in an 8-ounce serving. Two additional soda brands had a median sugar content of 42 grams per serving (Virgil's and Cheerwine), and four brands had median sugar of 32 grams per serving or more (Reed's, Tahitian Treat, Big Red, and Fanta). Some full-calorie sodas also contained zero-calorie sweeteners, such as Faygo soda with sucralose plus 23 to 28 grams of sugar per serving.

Jones, Reed's, and PepsiCo also offered reduced-sugar sodas ($n=8$) with 2 to 10 grams of sugar. Two recently introduced PepsiCo products, Pepsi NEXT and Mtn Dew Kickstart, each contained 40 calories per 8-ounce serving. In 2011, Sprite offered a reduced-calorie soda called Sprite Green, which has since been discontinued, and 7UP Plus, a reduced-sugar soda with 1 gram of sugar, was also discontinued. However, Dr Pepper Snapple Group introduced other reduced-calorie sodas after 2011: the company's "Ten" products were 10-calorie versions of popular brands, including 7UP, Dr Pepper, Sunkist, A&W, Canada Dry, and RC Cola. These products were artificially sweetened and contained two grams of sugar per serving. We have classified them as diet products due to their very low sugar content relative to other sugar-sweetened

soda products. Eight soda products in 2014 were also sweetened with 1% to 5% juice.

Nearly all soda brands reported their caffeine content in 2014, and 65% were caffeine-free. Of those containing caffeine, the median was 29 milligrams. Two Mtn Dew products – Mtn Dew Game Fuel Citrus Cherry and Mtn Dew Game Fuel Electrifying Berry – had the highest caffeine in the regular soda category with 49 milligrams per 8-ounce serving. Mtn Dew Kickstart products also had 46 milligrams of caffeine.

Nearly all soda brands (95%) from the companies examined in 2011 remained in distribution in 2014 (see **Table 8**). Just one Coca-Cola brand – Vault, the most-caffeinated soda in the 2011 report – was discontinued. Compared with 2011, calories, sugar, and sodium content of these products remained virtually unchanged. Positively, there was an increase in the percentage of products reporting exact caffeine content, increasing from approximately one-half in 2011 to 95% of products in 2014. The median caffeine in these products dropped from 36 to 28 milligrams, primarily due to the discontinuation of Vault products. One notable subbrand introduced in 2013 was Mtn Dew Kickstart (two products), a combination of reduced-sugar Mtn Dew and 5% juice.

Table 8. Regular soda nutrition*

Company	2011	2014
	# of brands (products)	# of brands (products)
Coca-Cola	5 (16)	4 (11)
Dr Pepper Snapple Group	9 (34)	9 (43)
PepsiCo	5 (19)	5 (23)
Nutrition	% or median (range)	% or median (range)
Reduced-sugar products	1%	4%
Calories	110 (10-133) kcal	110 (40-130) kcal
Sugar	30 (1-35) g	29 (10-35) g
Sodium	37 (17-70) mg	40 (20-70) mg
Caffeine	36 (15-49) mg	28 (6-49) mg
Products reporting that they contain no caffeine	19%	61%
Products reporting that they contain some caffeine (but do not specify amount)	4%	0%
Products reporting specific caffeine content	29%	38%

*Analysis of changes over time for brands that were included in the 2011 report, including new products introduced since 2011 and products that are not necessarily included in our 2014 product list (due to low sales)

Source: Nutritional content analysis (2011, 2014)

Energy drinks and shots

We analyzed three categories of energy drinks: full-calorie ($n=39$), reduced-sugar ($n=11$), and diet drinks ($n=19$); as well as energy shots (which do not contain sugar) ($n=15$). In 2014, Rockstar was the only energy drink company with a median caffeine content greater than 80 milligrams per 8-ounce serving, although the caffeine in energy drink products varied widely. Starbucks Refreshers had the least caffeine with 33 milligrams, while two Rockstar Recover varieties had the most at 160 milligrams. Although energy shots have a smaller serving size (2- to 2.5 oz), they contained as much or more caffeine (up to 200 mg) per container (see **Table 9**).

Although most sugar-sweetened energy drinks contained less sugar than regular soda, some energy drinks contained equivalent amounts. Rockstar also had the highest sugar content of all energy drink brands, with a median of 31 grams per 8 ounces, followed by Full Throttle and AMP Energy with 29 grams per serving. Further, 58% of energy drinks contained zero-calorie sweeteners, as well as sugar. Although this category also had a relatively high proportion of reduced-sugar products, which typically contain zero-calorie sweeteners, many full-calorie energy drinks contained

sweeteners as well. For example, NOS, Java Monster, and Rockstar Super Sours contained zero-calorie sweeteners plus 15 to 33 grams of sugar per serving.

Changes in energy drink nutrition from 2011 and 2014 are summarized in **Table 9**. In 2014, the proportion of reduced-calorie energy drinks increased from 10% to 25%, contributing to the reduction in median sugar and calories for this category. Median caffeine content did not change. A positive change was a notable increase in percentage of products reporting exact caffeine content. In 2011, 57% of products specified caffeine per serving, while the remainder only indicated that they contained caffeine. In contrast, 92% reported exact caffeine content in 2014.

Three brands of energy shots are included in the 2014 analysis: 5-hour Energy, Stacker 2 XTRA, and SK Energy. Introduced since 2011, SK Energy was the most highly caffeinated product in this report with 250 milligrams in a single 2.5-ounce container. However, three of the four companies in our report that sold energy shots in 2011 have since discontinued their energy shot lines in the United States: Red Bull, Rockstar, and Arizona. Only 5-hour Energy was examined in both 2011 and 2014.

Table 9. Energy drinks and shots nutrition*

Company	Energy drinks		Energy shots	
	2011	2014	2011	2014
	# of brands (products)			
Arizona	1 (7)	1 (5)	1 (3)	0
Coca-Cola	2 (10)	2 (10)	0	0
Dr Pepper Snapple Group	1 (4)	1 (4)	0	0
Monster Beverage Corporation+	1 (23)	3 (22)	0	0
Innovation Ventures	0	0	1 (7)	1 (7)
PepsiCo	1 (9)	1 (9)	0	0
Red Bull	1 (4)	1 (2)	1(2)	0
Rockstar	1 (18)	1 (7)	1 (2)	0
Nutrition	% or median (range)			
Diet products	13%	14%	100%	100%
Reduced-sugar products	10%	25%	0%	0%
Products with 0-calorie sweeteners	64%	69%	79%	100%
Calories**	110 (10-144) kcal	105 (7-148) kcal	4 (2-27) kcal	4 (4) kcal
Sugar**	26 (1-35) g	21 (1-31) g	0 (0-6) g	0 (0) g
Sodium	130 (5-340) mg	113 (0-280) mg	18 (0-35) mg	18 (18) mg
Caffeine	81 (71-167) mg	80 (68-160) mg	80 (6-200) mg	200 (6-200) mg
Products reporting that they contain caffeine (but do not specify amount)	41%	8%	57%	0 %
Products reporting specific caffeine content	57%	92%	36%	100%

*Analysis of changes over time for brands that were included in the 2011 report, including new products introduced since 2011 and products that are not necessarily included in our 2014 product list (due to low sales)

**Calories and sugar for sugar-sweetened energy drinks only

+Formerly Hansen Beverage Company

Source: Nutritional content analysis (2011, 2014)

Fruit drinks

Of all products evaluated in this report, one fruit drink had the most calories: Minute Maid Cranberry Juice Cocktail from Coca-Cola with a staggering 57 grams of sugar per serving, nearly twice the category median. Goya Nectars had the highest median sugar content for a brand overall (35 grams per serving), followed by Welch's and Bolthouse Farms, both with 32 grams. More than one-quarter (27%) of all fruit drinks reported zero-calorie sweeteners, although the number may be higher due to the lack of available ingredient information for this category. Ingredient information could not be obtained for 30% of fruit drinks. A large proportion of fruit drinks (35%) were children's drinks (described in the following section).

As with other sugary drink categories, nutrition for non-children's fruit drinks showed little change from 2011 to 2014 (see **Table 10**). However, there was a notable reduction in the number of products providing ingredient information outside of product packages. We were able to obtain this information for 81% of these products in 2011, but only 55% of products in 2014. There was a drop in the percentage of reduced-calorie drinks, from 20% to 7% over the last three years, matched by a decline in the percentage of products reporting that they contained zero-calorie sweeteners.

Other sugary drink categories

Iced tea and coffee products tended to contain less sugar and fewer calories than regular soda or fruit drinks, but there were some exceptions. Of the iced tea brands examined, Snapple and Gold Peak had the highest median sugar content at 31 grams per 8-ounce serving (comparable to most regular sodas). One coffee brand (Starbucks) is also included in this

report. The median calories in Starbucks coffee products was more than twice the median for tea products (112 kcal vs. 50 kcal, respectively), but sugar content was similar. Higher calories for coffee products was due primarily to calories from fat and protein; they were the only drink products in this analysis containing a meaningful amount of macronutrients (i.e., fat, protein) in addition to carbohydrates from sugar. Coffee drinks also had a high median caffeine content of 77 milligrams, exceeded only by energy drinks, while median caffeine in iced tea products was 17 milligrams.

Information for iced tea nutrition over time is shown in **Table 11** (we did not analyze coffee drinks in 2011). As found with the other categories, there were no noteworthy changes in nutrition for products in this category. There was a slight drop in median caffeine content from 15 milligrams to 10 milligrams, and a slight increase in the number of products reporting exact caffeine content.

Sports drinks had the second-lowest median calorie and sugar content, but they were second highest in sodium (110 mg per serving) after energy drinks (113 mg per serving). Nearly one-third of sports drinks were classified as reduced-sugar products due to Gatorade's reduced-calorie G2 subbrand. G2 products contained 5 grams of sugar and 20 calories per serving (as well as the zero-calorie sweeteners sucralose and acesulfame potassium), compared to 14 grams of sugar and 50 calories in regular Gatorade products. Powerade (the other major sports drink brand) did not offer reduced-sugar products, but did offer Powerade Zero (a zero-calorie diet product not included in this analysis). Full-calorie Gatorade and Powerade had equivalent median sugar content, with 14 grams of sugar per 8-ounce serving. As shown in **Table 12**, the nutrition content of products in the sports drink category did not change from 2011 to 2013.

Table 10. Fruit drink nutrition*

Company	2011	2014
	# of brands (products)	# of brands (products)
Arizona	1 (7)	1 (10)
Campbell Soup Company	1 (8)	1 (10)
Coca-Cola	4 (51)	3 (23)
Dr Pepper Snapple Group	3 (32)	2 (32)
Ocean Spray	1 (32)	1 (36)
PepsiCo	3 (34)	2 (33)
Welch Foods Inc.	1 (25)	1 (23)
Nutrition	% or median (range)	% or median (range)
Reduced-sugar products	20%	10%
Products with 0-calorie sweeteners	22%	11%
Calories	110 (5-210) kcal	110 (5-217) kcal
Sugar	27 (1-54) g	26 (1-57) g
Sodium	20 (0-120) mg	20 (0-125) mg
Juice content	10% (1-56)	10% (2-42)

*Analysis of changes over time for brands that were included in the 2011 report, including new products introduced since 2011 and products that are not necessarily included in our 2014 product list (due to low sales)

Children's products are not included in this table.

Source: Nutritional content analysis (2011, 2014)

Table 11. Iced tea nutrition*

Company	2011	2014
	# of brands (products)	# of brands (products)
Arizona	1 (29)	1 (32)
Coca-Cola	1 (3)	1 (9)
Dr Pepper Snapple Group	1 (14)	1 (7)
Unilever	1 (15)	1 (18)
Nutrition	% or median (range)	% or median (range)
Reduced-sugar products	2%	3%
Products with 0-calorie sweeteners	11%	30%
Calories	70 (10-110) kcal	67 (40-110) kcal
Sugar	18 (2-28) g	17 (10-26) g
Sodium	20 (0-80) mg	20 (0-105) mg
Caffeine	15 mg	10 (0-30) mg
Products reporting that they contain no caffeine	0%	6%
Products reporting that they contain some caffeine (but do not specify amount)	69%	0%
Products reporting specific caffeine content	31%	79%

*Analysis of changes over time for brands that were included in the 2011 report, including new products introduced since 2011 and products that are not necessarily included in our 2014 product list (due to low sales)
Source: Nutritional content analysis (2011, 2014)

Two of the flavored water brands in this analysis are children's brands: Apple & Eve Waterfruits and Capri Sun Roarin' Waters. In 2014, Capri Sun Roarin' Waters and SoBe Lifewater contained zero-calorie sweeteners, while Apple & Eve Waterfruits and Vitamin Water did not. The range of calories for all full-calorie flavored waters was relatively small (35-48 kcal per serving), and the majority of flavored waters qualified as reduced-sugar products, with 40 calories or less per 8-ounce serving. However, there was one notable exception. Vitamin Water had the highest median calorie content, with 48 calories and 14 grams of sugar per eight ounces. **Table 13** shows changes over time for the category. Vitamin Water from Coca-Cola continued to dominate the category with ten products. PepsiCo's Propel Zero, with two grams of sugar per serving, was discontinued after 2011.

Summary of nutritional content by category

As in 2011, researchers' experiences collecting nutrition information varied widely by company. In 2014, the large beverage companies (Coca-Cola, Dr Pepper Snapple Group and PepsiCo) maintained websites that generally provided complete and easily accessible nutrition information, including lists of ingredients. In contrast, many other companies did not provide complete nutrition information on their websites, especially ingredient lists, and customer service representative often were unhelpful. Of note, two energy drink companies (Monster Energy and Rockstar) provided comprehensive nutrition information on their websites in 2011, but this information was no longer available when we collected our data in 2014. Positively, nearly all energy drinks and regular soda products did report their exact caffeine

Table 12. Sports drink nutrition*

Company	2011	2014
	# of brands (products)	# of brands (products)
Arizona	1 (3)	1 (2)
Coca-Cola	1 (12)	1 (8)
PepsiCo	1 (35)	1 (42)
Nutrition	% or median (range)	% or median (range)
Reduced-sugar products	24%	23%
Products with 0-calorie sweeteners	26%	23%
Calories	50 (20-67) kcal	50 (20-53) kcal
Sugar	14 (5-15) g	14 (5-14) g

*Analysis of changes over time for brands that were included in the 2011 report, including new products introduced since 2011 and products that are not necessarily included in our 2014 product list (due to low sales)
Source: Nutritional content analysis (2011, 2014)

Table 13. Flavored water nutrition*

Company	2011	2014
	# of brands (products)	# of brands (products)
Arizona	1 (4)	1 (5)
Coca-Cola	1 (12)	1 (10)
PepsiCo	2 (13)	1 (7)
Nutrition	% or median (range)	% or median (range)
Reduced-calorie products	59%	55%
Products with 0-calorie sweeteners	45%	32%
Calories	40 (10-50) kcal	40 (25-48) kcal
Sugar	10 (2-13) g	10 (8-13) g
Sodium	0 (0-30) mg	6 (0-62) mg

*Analysis of changes over time for brands that were included in the 2011 report, including new products introduced since 2011 and products that are not necessarily included in our 2014 product list (due to low sales)

Children's products are not included in this table.

Source: Nutritional content analysis (2011, 2014)

content in 2014, whereas many only reported that caffeine was present in 2011.

Regular soda, fruit drinks, and energy drinks continued to have the highest median sugar content at 24 to 29 grams (totaling 100 to 110 kcal) per 8-ounce serving, while flavored water, sports drinks, and iced tea/coffee had the least sugar at 10 to 14 grams. Minute Maid Cranberry Juice Cocktail had the highest sugar content of all products analyzed with 57 grams per serving. The flavored water category had the most reduced-sugar products (i.e., 40 kcal per serving or less) at 62%, compared with 5% of regular soda products. However, products that did not qualify as reduced-sugar products often contained zero-calorie sweeteners in addition to high levels of sugar, including approximately one-quarter of energy drinks and 15% of fruit drinks and iced teas or coffees.

Notable new products introduced since 2011 include Mtn Dew Kickstart, a reduced-sugar variety of Mtn Dew with 5% juice; Pepsi NEXT reduced-calorie soda; and SK Energy, the most highly caffeinated product in this report (250 mg in a 2.5-oz container).

Children's drinks

In this report, we analyzed 17 children's brands from 14 companies totaling 162 products (see **Table 14**). Nutrition content is reported for an 8-ounce serving, with the exception of seven brands only available in smaller-sized pouches or boxes (6-6.75 g) and four Capri Sun products offered in 11.2-ounce pouches. The median serving size for this category was 8 ounces. We analyzed two children's flavored water brands, but the majority of children's brands (88%) were fruit drinks. There were 60 median calories in children's fruit drinks, versus 30 in children's flavored waters. Median calories per serving for individual brands of sugary drinks ranged from 10 (Little Hug Fruit Barrels) to 130 (Welch's Chillers). It was difficult to obtain ingredient information for products in this category, with seven out of 17 brands not readily providing lists of ingredients.

One in ten children's drinks examined were diet (i.e., contained no added sugar), 29% were reduced-sugar, and 61% were full-calorie. However, six out of ten products for brands reporting ingredients contained zero-calorie sweeteners, including full-calorie Sunny D and Hawaiian Punch products. To our knowledge, Apple & Eve Waterfruits and Vita Coco Kids were the only reduced-sugar children's brands that did not contain zero-calorie sweeteners. Further, many children's product names did not indicate that they were reduced-sugar or diet products. For instance, Tum E Yummies, Little Hug Fruit Barrels, and Mondo Fruit Squeezers all contained 40 or fewer calories per 8-ounce serving, but only disclosed zero-calorie sweeteners on the ingredient list under the nutrition facts panel (and only indicated the sweeteners' chemical name, not the more easily recognized brand name).

Changes over time

Table 15 provides an overview of children's products examined in both 2011 and 2014. As with other sugary drink categories, median calories, sugar, and sodium remained virtually the same. Similarly, the proportion of products with zero-calorie sweeteners did not change: four in ten products reported containing zero-calorie sweeteners in both 2011 and 2014. Notably, the percentage of products reporting juice content increased from 32% to 45%. However, the median and range of juice content in children's products did not change from 2011 to 2014 (5% to 11%).

There were some changes in products offered by popular children's brands. Kool-Aid discontinued its zero-calorie dissolvable drink tablets (Kool-Aid Fun Fizz), but added a diet liquid water enhancer (Kool-Aid Liquid Drink Mix). Capri Sun also added a novel product: an 11.2-ounce Capri Sun "Big Pouch" line aimed at older children. This product was the largest single-serving children's product examined, with 130 calories, 33 grams of sugar, and just 10% juice. Fewer single-serve drink pouches and boxes were offered as a proportion of the category, resulting in an increase in the median serving size from 6.8 to 8 ounces.

Table 14. Nutritional content of children's brands

Brand	Category	Subcategory	# of products	Serving size (oz)	Calories (kcal): median (range)	Sugar (g): median (range)	0-calorie sweeteners (Yes/No)
Welch's Chillers	Fruit drinks	Full-calorie	5	8	130 (120-140)	30 (28-33)	*
Happy Drinks	Fruit drinks	Full-calorie	11	8	120 (120)	27 (27)	N
Robinsons Fruit Shoot	Fruit drinks	Full-calorie	3	8	119 (119)	29 (25-29)	N
Bug Juice	Fruit drinks	Full-calorie	3	8	110 (110-120)	26 (26-29)	N
Minute Maid Coolers	Fruit drinks	Full-calorie	6	6.75	100 (90-100)	25 (24-27)	N
Hi-C	Fruit drinks	Full-calorie	3	6	80 (80-90)	22 (22-23)	N
Capri Sun	Fruit drinks	Full-calorie	18	6-11.2	60 (60-130)	16 (16-33)	N
Hawaiian Punch	Fruit drinks	Full-calorie	15	8	60 (60-110)	15 (13-29)	Y
Kool-Aid (Jammers, Twists, packets)	Fruit drinks	Full-calorie	17	6.75-8	60 (60-80)	16 (16-20)	N
Sunny D	Fruit drinks	Full-calorie	13	8	60 (50-60)	14 (13-15)	Y
Fruit Rush	Fruit drinks	Full-calorie	4	8	60 (60)	14 (14)	*
Apple & Eve Waterfruits	Flavored water	Reduced-calorie	3	6.75	40 (40)	10 (10)	N
Tum E Yummies	Fruit drinks	Reduced-calorie	5	8	40 (40)	10 (10)	Y
Kool-Aid (Bursts, Singles)	Fruit drinks	Reduced-calorie	9	6.75-8	35 (30-35)	9 (7-9)	Y
Vita Coco Kids	Fruit drinks	Reduced-calorie	5	6	35 (35)	8 (8)	N
Capri Sun (Roarin' Waters)	Flavored water	Reduced-calorie	6	6	30 (30)	8 (8)	Y
Mondo Fruit Squeezers	Fruit drinks	Reduced-calorie	8	6.75	20 (20)	4 (4)	Y
Little Hug Fruit Barrels	Fruit drinks	Reduced-calorie	10	8	10 (10)	2 (2)	Y
Hawaiian Punch (Fruit Juicy Red Light)	Fruit drinks	Diet	1	8	10 (10)	2 (2)	Y
Minute Maid (Fruit Falls)	Flavored water	Diet	2	8	6 (6)	1 (1)	Y
Hawaiian Punch (Singles to Go)	Fruit drinks	Diet	10	8	5 (5)	0 (0)	Y
Kool-Aid (Liquid Drink Mix)	Fruit drinks	Diet	4	8	0 (0)	0 (0)	Y

*Information not reported

Source: Nutritional content analysis (2014)

Table 15. Children's drinks in 2011 and 2014*

Company	2011	2014
	# of brands (products)	# of brands (products)
Arizona	1 (2)	1 (2)
Coca-Cola	3 (14)	3 (11)
Dr Pepper Snapple Group	1 (9)	1 (13)
Kraft Foods	3 (59)	2 (54)
Sunny Delight Beverages	1 (11)	1 (13)
Nutrition**	% or median (range)	% or median (range)
Reduced-calorie products	21%	19%
Products with 0-calorie sweeteners	40%	41%
Serving size	6.8 (6-8) oz	8 (6-11.2) oz
Calories	60 (10-120) kcal	60 (10-130) kcal
Sugar	16 (2-29) g	16 (2-33) g
Sodium	15 (0-190) mg	15 (0-170) mg
Products containing juice	32%	45%
Juice content (of those reporting % juice)	5% (5-11%)	5% (5-11%)

*Analysis of changes over time for brands that were included in the 2011 report, including new products introduced since 2011 and products that are not necessarily included in our 2014 product list (due to low sales)

**Excludes diet drinks

Source: Nutritional content analysis (2011, 2014)

Some brands also reduced their sugar content. In 2011, Hawaiian Punch products contained 26 to 29 grams of sugar per serving, with one light product (containing 2 grams of sugar). In 2014, just two Hawaiian Punch products had 29 grams of sugar, while the rest contained 14 to 17 grams (the product with 2 grams of sugar also remained). This reduction was accompanied by the addition of zero-calorie sweeteners to all but two products. Sunny D also decreased the sugar content of its products, from 18 to 20 grams of sugar per serving in 2011 to 13 to 15 grams in 2014. In both 2011 and 2014, all but one Sunny D product contained zero-calorie sweeteners.

Comparison of Children's Fruit Drinks with Other Fruit Drinks

An overview of the 137 children's fruit drinks versus 289 other fruit drinks in our 2014 analysis is provided in **Table 16**. Median calories of children's drinks were 45% lower than other fruit drinks (60 kcal for children's products vs. 110 kcal for other products). However, this difference was accompanied by a higher proportion of children's drinks with zero-calorie sweeteners. More than one-third (36%) of children's fruit drink products reported containing zero-calorie sweeteners, compared to 23% of other fruit drinks. Sodium was very low for all fruit drinks, at 15 to 16 milligrams per serving, with one notable exception. Sunny D children's products contained 130 to 170 milligrams of sodium, and Sunny D Smooth was the highest sodium fruit drink with 170 milligrams per serving. Of note, non-children's drinks were more likely to report containing juice (63% versus 38% of children's fruit drinks), and their median juice content was 12%, compared with 5% for children's products.

Summary of Children's Products Nutritional Content

Fruit drinks made up the majority of children's drinks in this analysis, but the category also included two flavored water brands (Capri Sun Roarin' Waters and Apple & Eve Waterfruits).

Table 16. Children's versus other fruit drinks*

# of products	Children's fruit drinks	Other fruit drinks
	137	285
Nutrition	% or median (range)	% or median (range)
Serving size (oz)	8 (6-11.2) oz	8 (6-8) oz
Calories	60 (6-140) kcal	110 (5-217) kcal
Sugar	20 (1-33) g	26 (1-57) g
Sodium	16 (0-170) mg	15 (0-125) mg
Reduced-sugar products	28%	10%
Products with 0-calorie sweeteners	36%	22%
Products reporting juice content	38%	63%
Juice content (of those reporting % juice)	5% (3-50%)	12% (1-50%)

*Information for sugar-sweetened children's products only
Source: Nutritional content analysis (2014)

Median sugar in these products ranged from 2 grams (Mondo Fruit Squeezers and Little Hug Fruit Barrels) per 8-ounce serving to 30 grams (Welch's Chillers). One recently introduced children's product, Capri Sun Big Pouch, contained 33 grams of sugar and 130 calories in one 11.2-ounce single-serving package. Although median calories in children's fruit drinks was 60, compared with 110 calories in other fruit drinks, 36% of children's products also contained zero-calorie sweeteners (versus 22% of other drinks). Even some full-calorie children's products, such as Sunny D and Hawaiian Punch, contained artificial sweeteners. However, for many products, sweetener information was only available by examining ingredient lists under nutrition facts panels on the product packages. Apple & Eve Waterfruits and Vita Coco Kids were the only reduced-sugar children's drink in our analysis that did not contain zero-calorie sweeteners. Further, just 38% of children's fruit drinks reported containing juice, compared with two-thirds of other fruit drinks, and the median juice content was just 5%.

On-package marketing

On-package marketing	Definition
Nutrition-related messages	All messages about product nutrition appearing on the product package, including claims about ingredients, natural messages, calorie labels, and other health-related messages.
Ingredient claim	Any claim regarding micronutrients (vitamins and minerals), antioxidants, and electrolytes, as well as sugar, artificial flavors, colors, and sweeteners, gluten-free, and caffeine contained in the product.
Natural claim	Any message about natural products or ingredients (including natural flavors or sugar), in addition to real, organic, and GMO references.
Calorie labels	Calorie counts (per serving or per container) indicated on the product package (in addition to the nutrition facts panel).
Other health-related messages	Other messages that imply health-related benefits from consuming the products, including hydration, exercise performance, and energy.
Child feature	Indicates that a product may be intended for children, including cartoon brand and licensed characters and any reference to kids/family, fun, or child-targeted promotions on the package.
Promotion	Reference to a specific event, program, sports team or athlete, celebrity, sweepstakes, or philanthropic organization.

“What’s in a Sprite? It’s perfectly clear. Simple ingredients, no caffeine and natural flavors. Feel good about the choice you’ve made for your family.” Dr Pepper Snapple Group soda brands often featured the natural claim, “naturally flavored with other natural flavors.” Coca-Cola placed calorie labels on most of its soda packages (86%), while Dr Pepper Snapple Group and PepsiCo did so less systematically (appearing on 64% and 40% of packages, respectively).

Fruit drinks. All fruit drinks featured nutrition-related messages on most packaging, with an average of 4.3 messages per package. However, ingredient claims appeared on 100% of children’s fruit drinks. Approximately half of all fruit drinks contained some form of natural claim, while children’s fruit drinks were 50% more likely to include calorie labels.

Five children’s fruit drinks ranked in the top-20 brands for number of nutrition-related messages per package, including Minute Maid Coolers and Fruit Falls (7.0 messages per package), Little Hug Fruit Barrels and Tum E Yummies (6.0 messages each), Hawaiian Punch (5.9), and Hi-C (5.0). The most frequent ingredient claims on these products highlighted vitamin C and other vitamins and minerals. Little Hug Fruit Barrels packaging featured a comparative claim, “33% more fruit drink than leading pouch drinks,” touting its bigger size. Hawaiian Punch packaging for its Fruit Juicy Red Light variety stated that it had “90% fewer calories than leading brands,” while the Mixed Berry Citrus variety claimed, “40% less sugar than leading brands.” Four other varieties of Hawaiian Punch claimed “50% less sugar than leading fruit drinks,” and Kool-Aid multipacks packaging promoted “75% less sugar than other leading soda brands.” Of note, all these products contained artificial sweeteners, but did not provide that information on the product package. Children’s fruit drinks also often carried messages that the drinks did not contain artificial flavors, preservatives, or high fructose corn syrup.



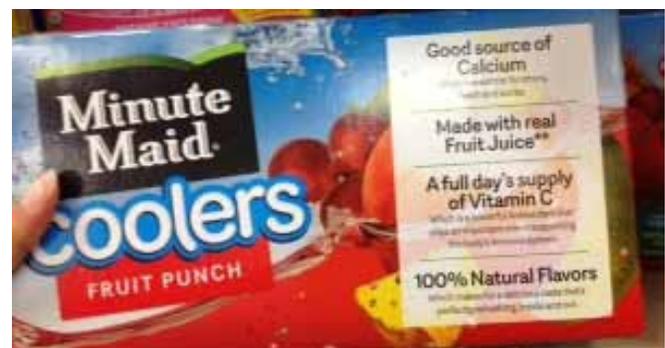
A non-children’s fruit drink, V8 Fusion Refreshers, ranked second in nutrition-related messages, averaging 7.0 statements per package. Langers and V8 Splash also ranked in the top-20, each with 5.4 messages per package. On the other hand, some fruit drink brands featured relatively few nutrition-related messages. Goya had no such messages on its packages. Ocean Spray, Jumex, Mondo Fruit Squeezers, and Santa Cruz Organics packages averaged just two nutrition messages per package.

Sports drinks. Although sports drinks had the lowest proportion of packages with nutrition-related messages, packages that did feature them averaged 4.4 messages, slightly more than the average for all sugary drinks. Sports drink claims most often promoted electrolyte complexes, and one-third featured vitamin and mineral claims. Sports drinks carried natural claims on 61% of packages, most often highlighting “naturally flavored,” “naturally flavored with other natural flavors,” or “naturally and artificially flavored.” In addition, 99% of packages featured other health-related messages, typically promising to improve hydration after physical activity. Nearly all (97%) of sports drinks packages also featured calorie labels, compared with 0% of packages in 2010.

Powerade sports drink ranked third of all brands with 6.7 nutrition-related messages per package, promoting its 4-electrolyte complex in the product name (ION 4), along with a “replenish electrolytes” message on the label. In contrast, the other major sports drink brand (Gatorade), featured half as many nutrition-related messages (averaging 3.6 per package).

Iced tea. Iced tea brands had the second highest number of nutrition-related messages per package (4.7), and nearly all packages contained at least one message. Eight out of ten packages contained at least one statement that the ingredients in the iced tea were natural or real, and low sodium claims were common. Calorie labels on iced tea packages were infrequent, appearing on one-fifth of packages.

Lipton iced tea products were most likely to contain ingredient claims, such as “sodium free,” “no preservatives,” and “no added color,” with an average of 6.1 nutrition-related messages per package. SoBe brands also featured many nutrition-related messages, averaging 6.0 per package. In addition, Honest Tea, Gold Peak, and Fuze (from Coca-Cola)



Nutrition-related messages on children’s fruit drink packages



Nutrition-related claims on children's flavored water packages

and XINGtea ranked in the top-20 brands averaging 5.0 to 5.8 nutrition-related messages per package.

Flavored water. Vitamin C was the most common ingredient claim on flavored water packages, as most drinks contained 100% of the daily value. Every product in the category also featured a claim about natural ingredients, most often describing its natural flavors. In addition, the two children's flavored water brands, Apple & Eve Waterfruits and Capri Sun Roarin' Waters, contained hydration claims.

Apple & Eve Waterfruits was the top ranking brand in number of nutrition-related messages across all product categories, averaging eight messages on all packages. Waterfruits packaging highlighted "more good stuff," such as pure fruit juice and coconut water, and "no bad stuff," such as artificial colors and sweeteners. Capri Sun Roarin' Waters featured an average of 4.8 messages on all products. The two remaining flavored water brands in this analysis also featured nutrition-related messages on 100% of products, averaging 6.4 messages-per-package for Vitamin Water (ranking sixth overall) and 3.6 for SoBe Lifewater.

Child Features and Promotions

Overall, 29% of sugary drink packages included child features, such as cartoon brand characters and references to "kids," and 30% of packages featured promotions, including sweepstakes, giveaways, and tie-ins with promotional partners (see **Table 18**). Not surprisingly, children's fruit drinks and

flavored water (which also included a high proportion of children's products) were most likely to include child features on the package. However, 12% of iced tea packages, 6% of other fruit drink packages, and 3% of regular soda packages also included child features. Of note, children's fruit drinks were more likely to feature promotions, appearing on the majority of product packages (57%). Approximately one-third of iced tea and other fruit drink packages also featured promotions.

Child features. Child features on children's drink packages typically appeared in the form of cartoon drawings and brand characters, such as the fruit characters on Hi-C and the Kool Aid Man on multipack boxes, as well as references to fun, play, and family. Hi-C, Capri Sun, and Kool Aid (Jammers and Bursts) had the most child features (2.0 to 4.0) on their packages. Of note, some children's fruit drink packages included relatively few child features per package, including Tum E Yummies, Little Hug Fruit Barrels, and Hawaiian Punch. Langers drink packages were unusual, typically featuring company stories referencing family and kids. In the flavored water category, child features on packaging ranged from one per package on Apple & Eve Waterfruits to 2.5 on Capri Sun Roarin' Waters. Both brands featured cartoon images of children playing sports and the taglines, "a fun way for kids to hydrate" (Roarin' Waters) or "a delicious way to drink more water" (Waterfruits).

Child features on products that did not qualify as children's products in our analysis were found most often in the regular soda category. Cartoon images, such as fruit or brand characters, appeared on four non-children's soda brands: 7UP,

Table 18. Child features and promotions on product packages by category

Category	# of brands	# of packages	Child features (% of packages)	Promotions (% of packages)
Regular soda	16	73	3%	21%
Children's fruit drinks	8	17	92%	57%
Other fruit drinks	13	39	6%	30%
Sports drinks	3	37	0%	19%
Iced tea	14	30	12%	33%
Flavored water	4	18	61%	22%
Total	58	214	29%	30%

Source: On-package marketing analysis (July 2014)

compared with 2011. Flavored water, iced tea, and children's product packages featured the most nutrition-related messages (4.9, 4.7, and 4.5 per package, respectively), whereas regular soda packages contained the fewest (84% of packages averaging 3.5 messages). Brands with the most on-package nutrition messages included Apple & Eve Waterfruits (children's flavored water) with eight messages per package, and V8 Fusion Refreshers (fruit drink), Minute Maid Coolers, and Fruit Falls (children's fruit drinks), and Sierra Mist regular soda, each averaging seven messages per package.

Child features were present on 29% of sugary drink packages across all categories, and 30% of packages included at

least one promotion. Although children's drinks were most likely to include child features, we also found child-friendly cartoon images on other fruit drink, iced tea, and regular soda packages. Roughly one-third of other fruit drink and iced tea packages and one out of five regular soda, sports drink, and flavored water packages featured promotions. However, packaging for children's products was most likely to include promotions, which appeared on 57% of children's fruit drink packages. Child-oriented promotions also appeared on other sugary drink packages, including a school soccer ball giveaway by Coca-Cola, a Teenage Mutant Ninja Turtles movie promotion on Crush soda, and Let's Play promotions on most Dr Pepper Snapple Group products.

Nutritional Content and on-package marketing

Signs of progress

- The largest beverage companies (Coca-Cola, Dr Pepper Snapple Group, and PepsiCo) have made it easier to obtain nutrition information for most of their products. Both nutrition and ingredient information were generally available on company websites. In addition, exact caffeine and calories per serving were disclosed on the majority of product packages.
- Some sugary drink brands introduced new reduced-sugar products with 40 calories or less per 8-ounce serving, including PepsiCo's Pepsi NEXT and Mtn Dew Kickstart sodas and Dr Pepper Snapple Group's "Ten" products (including 7UP Ten, Dr Pepper Ten, and Sunkist Ten).
- Overall, 62% of flavored water products with added sugar had 40 calories or less, as well as 29% of sugar-sweetened sports drinks and 15% of iced teas.
- Seven of the children's drinks in our analysis also contained 40 calories or less per serving, and some children's fruit drinks reduced their sugar content from 2011 to 2014, including Sunny D and Hawaiian Punch.

Continued reasons for concern

- Obtaining nutrition information became more difficult for some product categories. Fruit drink manufacturers (including Campbell Soup Company [V8 brand products], Ocean Spray, and Welch's) often provided nutrition facts panel information about their products online, but not ingredient lists. They were also less likely to indicate calories per serving on product packages. Major energy drink companies (Monster Energy and Rockstar) did not provide nutrition information on their websites in 2014 at the time of our analysis (although they had in 2011).
- From 2011 to 2014, there were no notable changes in median sugar or calories in regular soda, fruit drinks, sports drinks, iced tea, or flavored water sugary drink products.
- Children's fruit drinks contained a median of 60 calories and 20 grams of sugar per serving. Although other fruit drinks tended to be higher in calories and sugar, children's drinks were more likely to contain zero-calorie sweeteners (36% of products) and less likely to contain juice (38% of products). Some high-sugar children's drinks also contained artificial sweeteners, including Hawaiian Punch and Sunny D. Although lower-sugar claims often appeared on packaging for children's drinks that contained artificial sweeteners, the only indication of these sweeteners was found in the list of ingredients under the nutrition facts panel (listed under their chemical names).
- Children's fruit drinks were also more likely than other fruit drinks to include nutrition-related messages on product packaging (averaging 4.5 messages per package). The majority of children's drinks also featured promotions on the packages, appearing on children's products more often than any other drink category.
- New product introductions since 2011 that raise concerns include Capri Sun Big Pouch fruit drinks with 130 calories and 33 grams of sugar per 11.2-ounce serving; highly caffeinated Mtn Dew products (Game Fuel and Kickstart) with 43 to 46 milligrams of caffeine per 8-ounce serving; and SK Energy with 250 milligrams of caffeine per 2.5-ounce shot.

Traditional media advertising

In this section, we compare traditional advertising by beverage category in 2013 versus 2010. We first present advertising spending in measured media, including TV, magazines,

radio, outdoor, and the internet. We then provide data on child and teen exposure to TV advertising in total and by drink category, as well as advertising that appears to be specifically targeting youth. We also provide data on brand appearances in prime-time television programs.

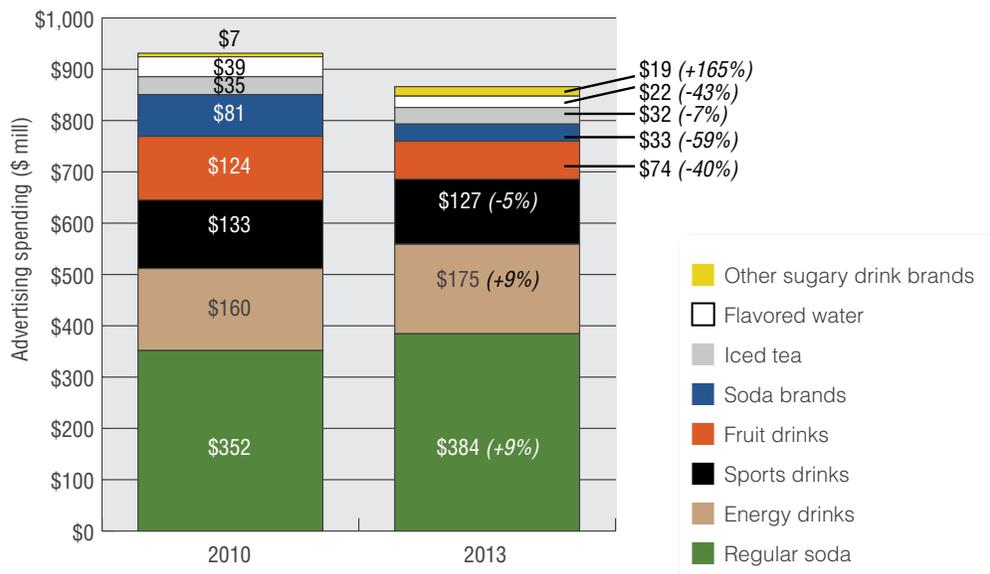
Advertising spending

Advertising spending	Definition
Advertising spending	Amount spent on all advertising in measured media, including TV, magazines, internet, radio, newspapers, free standing insert coupons, and outdoor advertising.
Soda brand advertising	In addition to advertising one specific product, soda brands sometimes advertise both regular and diet versions of the brand in the same advertisement, or they advertise the brand (e.g., Coca-Cola) but not a specific product (e.g., Coca-Cola Classic or Diet Coke). In these instances, Nielsen classifies the category as “soft drink” or “drink products.” In this analysis, we assign these brand-level advertisements to the “soda brand” category as they cannot be classified as either regular or diet soda advertising.
Other sugary drink brand advertising	Brand-level advertising is also used to promote products in other drink categories. For example, some Snapple brand-level advertising is classified by Nielsen as “drink products.” This advertising supports Snapple products in multiple categories, including fruit drinks, regular iced tea, and diet iced tea products. We assign these brand-level advertisements to the “other sugary drink brand” category.
Company advertising	Beverage company ads that do not specify an individual brand are categorized as “drink products” by Nielsen. We assign these to the “company advertising” category.

Advertising spending for sugary drink and energy drink (including energy shots) categories totaled \$814.3 million in 2013, a decline of 3% versus 2010 (see **Figure 5**). As in 2010, almost one-half of this spending was for regular soda, followed by energy drinks (21%), and sports drinks (16%). Fruit drinks, iced tea, and flavored water together represented just 11% of total advertising spending for sugary drinks. Advertising spending for children’s fruit drinks totaled \$44.9

million, representing 60% of total fruit drink category spending. In addition, children’s flavored water (a new category that was not advertised in 2010) represented 27% of 2013 advertising spending on all flavored waters. Companies also spent \$51.8 million on brand-level advertising for soda and other sugary drink brands. Coca-Cola and PepsiCo spent a further \$4.9 and \$1.1 million, respectively, on advertisements promoting their companies.

Figure 5. Advertising spending on sugary drink categories and brands



Source: Rudd Center analysis of Nielsen data (2014)

Table 19. Advertising spending by category and medium in 2013

Category	Advertising spending by medium (\$000)									
	TV		Radio		Outdoor		Internet		Magazines	
	2013	Change vs. 2010	2013	Change vs. 2010	2013	Change vs. 2010	2013	Change vs. 2010	2013	Change vs. 2010
Regular soda	\$321,273	8%	\$21,924	-19%	\$15,022	-55%	\$14,274	-74%	\$9,943	-2%
Energy drinks	\$164,116	13%	\$5,914	134%	\$1,578	-64%	\$954	-86%	\$627	-80%
Sports drinks	\$109,329	21%	\$297	-91%	\$42	-87%	\$462	-95%	\$13,936	-51%
Children's fruit drinks	\$29,231	-35%	\$0	-99%	\$0	*	\$946	100%	\$14,170	35%
Other fruit drinks	\$22,521	-69%	\$61	-97%	\$406	24%	\$40	-63%	\$5,385	-54%
Iced tea	\$22,792	-5%	\$2,103	41%	\$717	40%	\$314	145%	\$5,493	-25%
Children's flavored water	\$5,890	*	\$0	*	\$0	*	\$35	*	\$57	*
Other flavored water	\$15,196	-49%	\$487	51%	\$383	-48%	\$24	-100%	\$0	-100%
Total	\$690,349	-2%	\$30,787	-16%	\$18,147	-54%	\$17,050	-78%	\$49,611	-33%

*Not advertised in 2010

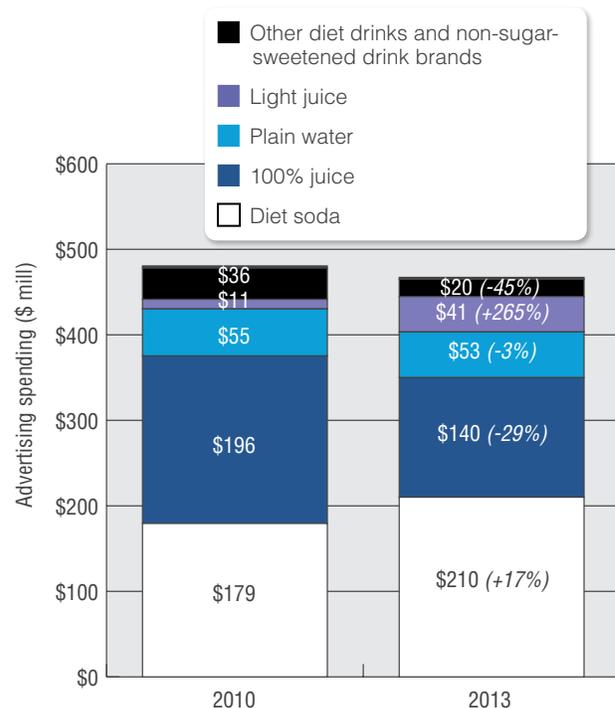
Source: Rudd Center analysis of Nielsen data (2014)

Changes in advertising spending from 2010 to 2013 varied by category. Both regular soda and energy drinks increased spending by 9%. In contrast, advertising for sports drinks and iced tea declined slightly (5% and 7%, respectively), and advertising for fruit drinks and flavored water decreased by more than 40%. Of note, advertising spending for children's fruit drinks declined by 23%, whereas advertising for other fruit drinks declined at a higher rate (by 55%). Excluding children's flavored waters (which were not advertised in 2010), spending on other flavored waters declined by 59%. Brand-level advertising for soda (i.e., ads for soda brands that did not specify a regular or diet soda product) decreased by 59%, but brand-level spending for other sugary drinks (i.e., ads for brands with drinks in multiple categories) saw the biggest percentage increase of 165%.

Table 19 provides the amount spent on different types of advertising by category in 2013 and changes versus 2010. Nearly all spending was allocated to TV advertising (85%) in 2013, compared to 74% of spending in 2010. However, there were differences by category. Energy drinks and flavored water advertised almost exclusively on TV, but regular soda utilized a variety of media, including radio, outdoor, internet, and magazines. Fruit drinks and iced tea both dedicated a higher than average proportion of advertising to magazines, including 11% of sports drink and 26% of fruit drink advertising. Although total spending on TV advertising remained relatively flat in 2013 versus 2010 (-2%), TV spending increased substantially for regular soda, energy drinks, and sports drinks. Of note, TV advertising for children's fruit drinks declined by one-third, but internet advertising for this category doubled and magazine ads increased 35%.

Advertising spending on other beverage categories

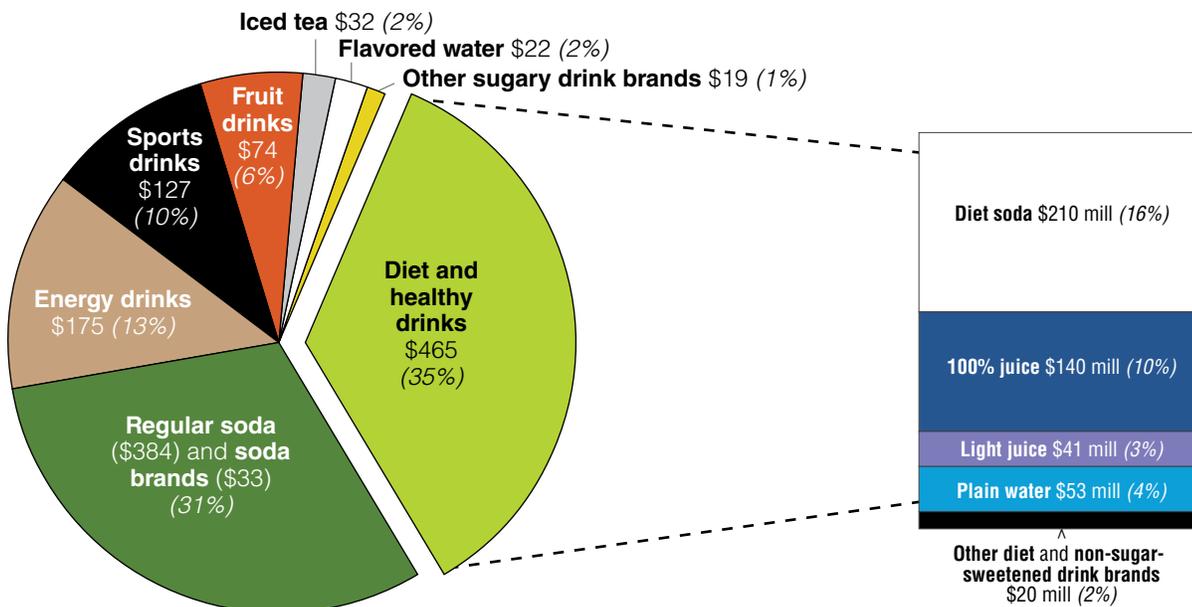
Beverage companies also spent \$465 million in 2013 to advertise non-sugar-sweetened drinks (including diet drinks, 100% juice, and plain water), reflecting a 3% reduction compared with 2010 (see **Figure 6**). Almost one-half of

Figure 6. Advertising spending on other beverage categories

Source: Rudd Center analysis of Nielsen data (2014)

advertising spending for these categories promoted diet soda, followed by 100% juice. Just \$53 million was spent to advertise plain water. A further \$2.3 million was spent on brand-level advertising for drinks without added sugar (primarily juice brands).

There were also notable shifts in spending from 2010 to 2013 for the non-sugary drink categories. Advertising for diet soda increased by 17%, while spending on other diet drinks (e.g., iced tea, sports drinks) decreased by 48%. Spending to advertise 100% juice declined 29%, yet light juice advertising

Figure 7. Advertising spending on all beverage categories in 2013 (\$ million)

Source: Rudd Center analysis of Nielsen data (2014)

increased almost four-fold (up 265%). Plain water advertising spending was flat from year to year at just over \$50 million.

In total, companies spent \$1.3 billion to advertise all categories of non-alcoholic refreshment beverages in 2013 (see **Figure 7**). Two-thirds (65%) of all beverage advertising supported sugary drinks and energy drinks. Companies spent over \$4.20 to advertise these unhealthy drinks for every \$1 they spent advertising 100% juice and plain water.

Advertising spending by company

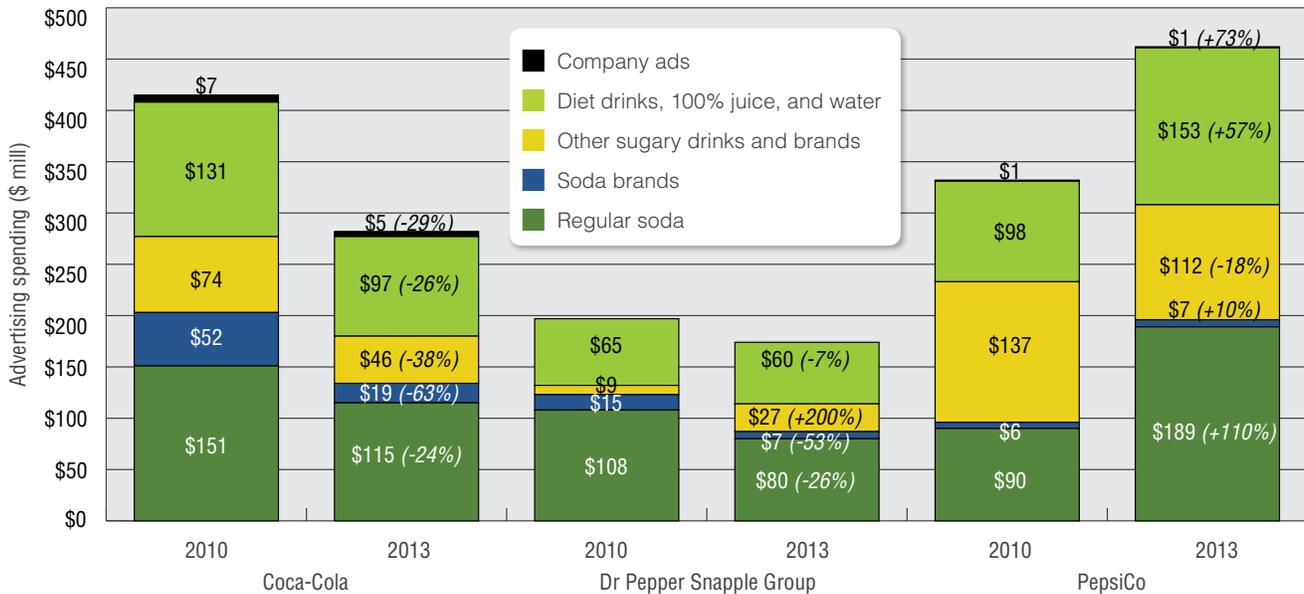
Just 14 of the 47 companies in our analysis advertised in measured media in 2013. Three companies were responsible for 70% of advertising spending on sugary drink and energy drink brands in 2013 (totaling \$609 million): PepsiCo, Coca-Cola, and Dr Pepper Snapple Group (see **Ranking Table 3**). Two energy drink companies (Innovation Ventures [5-hour Energy] and Red Bull) spent another \$147 million, representing 17% of the total.

From 2010 to 2013, changes in total advertising spending on sugary drinks and energy drinks varied widely by company. PepsiCo increased its advertising by 32%, overtaking Coca-Cola Co. as the number one advertiser of sugary drinks. In contrast, Coca-Cola and Dr Pepper Snapple Group reduced sugary drink advertising spending by 35% and 13%, respectively. Three additional companies increased their advertising: Red Bull (+84%), Kraft Foods (+5%), and Campbell Soup Company (from \$.3 million in 2010 to \$5.1 million in 2013), and one new company (SK Energy Shots) spent \$20 million in 2013. In contrast, five companies reduced advertising spending on sugary drinks by 40% or more (Ocean

Spray, Sunny Delight Beverages, Unilever, Welch Foods Inc., and National Beverage Company).

In 2013, Coca-Cola Co. Dr Pepper Snapple Group, and PepsiCo all continued to spend more to advertise their regular soda products than products in any other drink category, ranging from 41% of spending for PepsiCo and Coca-Cola to 46% for Dr Pepper Snapple Group (see **Figure 8**). Coca-Cola and Dr Pepper Snapple Group also dedicated an additional 7% and 4% of advertising budgets to brand-level advertising for soda. In addition, PepsiCo spent 23% of its total beverage advertising budget on sports drinks, and Dr Pepper Snapple Group spent 16% of its budget on other sugary drinks (primarily Snapple). For all three companies, diet drinks, 100% juice, and plain water represented approximately one-third of their beverage advertising spending.

There were notable shifts in spending within the portfolios of the top three companies. From 2010 to 2013, PepsiCo more than doubled advertising spending on its regular soda brands, while advertising for sports drinks (its most advertised category in 2010) declined slightly. PepsiCo increased advertising spending on its brands that do not contain added sugar by even more (+57%). In contrast, Coca-Cola Co. reduced advertising for its regular soda products by 24% and brand-level advertising by 63%, but increased advertising for sports drinks (+19%), energy drinks (+114%), and iced tea (+210%). Coca-Cola also reduced advertising for its drinks without added sugar by 26%. Dr Pepper Snapple Group reduced advertising spending for its regular sodas and non-sugar drinks, but tripled advertising for other sugary drinks.

Figure 8. Total advertising spending by beverage category for the top-three advertisers

Source: Rudd Center analysis of Nielsen data (2014)

Advertising spending by brand

Ranking Table 3 presents total advertising spending as well as spending on TV, magazines, radio, outdoor and internet advertising for all sugary drink and energy drink brands with at least \$1 million in advertising spending in 2013. A total of 58 brands, slightly more than half of the 106 brands in our analysis, advertised at this level. Five brands spent more than \$50 million in advertising: Pepsi regular soda, Gatorade sports drink, Coca-Cola regular soda, 5-hour Energy energy shots, and Dr Pepper regular soda. These five brands accounted for almost 60% of advertising spending for all sugary drinks and energy drinks in 2013. However, from 2010 to 2013, changes in advertising spending varied widely by brand.

Regular soda. Three PepsiCo regular soda brands increased advertising spending in 2013 versus 2010. Pepsi overtook Coca-Cola as the most advertised sugary drink in 2013, spending \$139 million in advertising, almost three times its 2010 spending. Of note, Pepsi NEXT — the reduced-sugar version of the brand — represented 24% of this spending (\$33.1 million). Brand-level advertising for Pepsi also increased 10% to \$5 million. In addition, PepsiCo more than doubled spending on Mtn Dew totaling \$41 million. Just under \$20 million of this spending promoted its new Mtn Dew Kickstart reduced-sugar soda, marketed as an alternative breakfast beverage. PepsiCo spent a further \$2 million to advertise Manzanita Sol, a Hispanic-targeted soda that was not advertised in 2010. In contrast, PepsiCo reduced spending on Sierra Mist by 64%, including brand-level advertising.

Coca-Cola and Dr Pepper ranked second and third in advertising for regular soda brands in 2013 at \$100 million and \$54 million, with declines of 24% and 5%, respectively,

versus 2010. Other top-ten regular soda brands with declines in advertising spending from 2010 to 2013 included 7UP and Canada Dry from Dr Pepper Snapple Group (-58% and -16%, respectively) and Sprite from Coca-Cola (-63%). However, Dr Pepper and 7UP each spent an additional \$1.7 to \$1.9 million in brand-level advertising (which did not specify regular or diet soda). Three additional regular soda brands spent more than \$1 million in advertising in 2010 but not in 2013: Fanta from Coca-Cola (\$6.3 vs. \$0.9 million, -85%); Sunkist from Dr Pepper Snapple Group (\$10.6 million vs. \$0 in 2013); and Shasta from National Beverage Corp (\$1.9 million vs. \$0 in 2013). In contrast, in 2013 Coca-Cola began advertising Seagrams regular soda (\$7.7 million) and Dr Pepper Snapple Group greatly expanded advertising for Sun Drop regular soda (\$4.6 million).

Although most regular soda brands spent 80% or more of their advertising budgets on TV, there were some notable exceptions. Mtn Dew had by far the highest spending on internet advertising at \$11.8 million (29% of its total budget). Pepsi regular soda ranked a distant second on the internet at \$2.1 million. Coca-Cola spent the most in outdoor advertising (\$19.2 million, including \$13.3 million in brand-level advertising and \$5.9 million for Coca-Cola regular soda), followed by Pepsi (\$8.9 million, including \$4.7 million in brand advertising). Other soda brands with more than \$1 million in outdoor advertising included Dr Pepper (regular soda) and 7UP (brand-level ads). Regular soda brands were also the highest spenders in radio advertising, including Pepsi (\$8.4 million), Coca-Cola (\$8.1 million), Sierra Mist (\$2.7 million in brand and regular soda ads), Mtn Dew (\$1.7 million), and Dr Pepper brand-level ads (\$1.4 million). Seagrams was the only soda brand with more than \$1 million in magazine advertising, devoting almost the entirety of its \$7.7 million budget to the medium.

Energy drinks. Four energy drink brands spent more than \$1 million in advertising in 2013. 5-hour Energy (Innovation Ventures) remained the most advertised energy drink product in 2013 at \$98.8 million, although spending declined somewhat (-8%) versus 2010. Red Bull increased its advertising spending by 84% to \$47.8 million in 2013, making it the sixth most advertised product in our analysis. A new energy shot, SK Energy, was introduced in 2011 (as Street King, and rebranded in 2012 as SK Energy) and spent \$20.4 million in 2013, ranking number nine in advertising spending of all products in our analysis. In addition, Coca-Cola increased spending on its NOS energy drink by 152%, totaling \$4.6 million in 2013. On the other hand, two energy drinks from our 2010 analysis ceased virtually all advertising in 2013. AMP Energy from PepsiCo, which spent \$13.6 million in 2010; and Celsius, which spent \$9.7 million. Some energy drinks devoted a relatively high proportion of advertising spending to non-TV media. Notably, SK Energy spent \$3.4 million on radio advertising, and Red Bull spent \$1.1 million in outdoor advertising.

Children's drinks. Three children's brands spent more than \$1 million in advertising in 2013, including two from Kraft Foods (Kool-Aid fruit drink and Capri Sun Roarin' Waters flavored water) and Sunny D fruit drink. Kool-Aid ranked eighth in advertising spending in 2013 at \$28.8 million, an increase of 19% versus 2010. Of note, almost one-half of this budget (\$13.5 million) was spent on magazine advertising. Kraft Foods' Capri Sun Roarin' Waters did not advertise in 2010, but was supported by \$6.0 million in advertising in 2013. In contrast, Kraft Foods spent only \$0.7 million to advertise Capri Sun fruit drinks in 2013, compared with \$9.9 million in 2010. Advertising for Sunny D declined 40% to \$13.8 million in 2013. Little Hug Fruit Barrels fruit drink brand had spent \$1.1 million in advertising in 2010, but spent just \$0.5 million (-58%) in 2013.

Other sugary drink categories. There were substantial changes in advertising spending for fruit drink brands not targeted at children. The most-advertised fruit drink brand in 2010 (Ocean Spray) reduced its spending by 42% to \$18.8 million in 2013. In contrast, three fruit drink brands spent more than \$1 million in 2013 that had very low or no advertising in 2010, including V8 Fusion Refreshers from Campbell Soup Company (\$3.6 million, almost entirely on magazine advertising); Tampico, a Hispanic-targeted product from Houchens Industries (\$3.4 million); and Poland Spring Nature's Blends from Nestle (\$1.5 million). However, five additional fruit drinks with large advertising budgets in 2010 eliminated virtually all advertising in 2013, including three Coca-Cola products: Minute Maid fruit drinks (\$18.5 million in 2010), Simply Lemonade (\$2.7 million), and Fuze fruit drinks (\$2.7 million), as well as Welch's and Old Orchard fruit drinks (\$5.5 million and \$1.7 million, respectively).

As in 2010, Gatorade from PepsiCo remained the second-most advertised sugary drink brand at \$108.2 million, although spending declined slightly (-4%). Gatorade was also the highest spending sugary drink advertiser in magazines at \$13.6 million. Its main competitor in the category (Powerade from Coca-Cola) increased spending by 19% to \$17.8 million.



Red Bull TV ad featuring celebrity athletes including skateboarder Ryan Sheckler

No other sports drink spent more than \$1 million in advertising in 2013. The two other flavored water brands (i.e., not children's products) spent considerably less in 2013 than in 2010. Coca-Cola reduced advertising spending for Vitamin Water by 50% to \$15.6 million, and PepsiCo stopped advertising its SoBe flavored water (the company spent \$7.4 million in 2010).

In contrast, Dr Pepper Snapple Group dramatically increased its advertising for Snapple iced tea (\$11.7 million, +166%) and the Snapple brand (\$15.6 million in 2013, +262%). Of note, the Snapple brand also includes fruit drinks, but the company did not advertise these products separately. In addition, two iced tea brands were advertised in 2013 that had not advertised in 2010: Fuze iced tea (from Coca-Cola) spent \$6.2 million and Lipton Pure Leaf (from PepsiCo) spent \$3.3 million. However, Unilever greatly reduced advertising spending on Lipton iced tea (\$9.2 million, -46%), and Coca-Cola reduced advertising for Gold Peak iced tea by 68%. Two iced tea brands from smaller companies (Swiss Premium and Turkey Hill) eliminated virtually all advertising in 2013 (spending \$6.4 and \$3.9 million, respectively, in 2010). The only iced coffee brand in our analysis (Starbucks) did not advertise in measured media in 2010 or 2013. As with the regular soda category, some iced tea brands spent disproportionately more of their budgets on non-TV advertising. For example, Fuze iced tea devoted 85% of its advertising to magazines (\$5.3 million). In addition,

Table 20. Brands with spending increases of \$5 million or more in 2013 versus 2010*

Company	Brand	Category	Advertising spending (\$000)	
			2010-2013 increase	% change
PepsiCo	Pepsi	Regular soda and soda brand	\$90,214	167%
Red Bull	Red Bull	Energy drink	\$21,799	84%
PepsiCo	Mtn Dew	Regular soda and soda brand	\$21,433	109%
SK Energy Shots	SK Energy	Energy drink	\$20,408	**
Dr Pepper Snapple Group	Snapple	Iced tea and other sugary drink brand	\$18,606	213%
Coca-Cola	Seagrams	Regular soda	\$7,651	**
Coca-Cola	Fuze	Iced tea and other sugary drink brand	\$6,731	4926%

*Also includes brand-level advertising spending when noted

**Not advertised in 2010

Source: Rudd Center analysis of Nielsen data (2014)

Table 21. Brands with spending decreases of \$5 million or more in 2013 versus 2010*

Company	Brand	Category	Advertising spending (\$000)	
			2010-2013 decrease	% change
Coca-Cola	Coca-Cola	Regular soda and soda brand	-\$57,598	-33%
Coca-Cola	Minute Maid	Fruit drink	-\$18,467	-100%
Dr Pepper Snapple Group	7UP	Regular soda and soda brand	-\$17,582	-56%
Coca-Cola	Vitamin Water	Flavored water	-\$15,668	-50%
PepsiCo	Sierra Mist	Regular soda and soda brand	-\$14,334	-64%
Coca-Cola	Sprite	Regular soda and soda brand	-\$14,273	-73%
Ocean Spray	Ocean Spray	Fruit drink and other sugary drink brand	-\$13,680	-42%
PepsiCo	Amp Energy	Energy drink	-\$13,608	-100%
Dr Pepper Snapple Group	Sunkist	Regular soda and soda brand	-\$11,108	-100%
PepsiCo	SoBe	Other sugary drink brand	-\$9,750	-98%
Celsius Holdings**	Celsius	Energy drink	-\$9,705	-99%
Sunny Delight Beverages	Sunny D	Fruit drink	-\$9,062	-40%
Innovation Ventures	5-hour Energy	Energy drink	-\$8,165	-8%
Unilever	Lipton	Iced tea	-\$7,969	-46%
Swiss Premium**	Swiss Premium	Iced tea	-\$6,314	-98%
Coca-Cola	Fanta	Regular soda and soda brand	-\$5,353	-85%
PepsiCo	Gatorade	Sports drink	-\$5,040	-4%

*Also includes brand-level advertising spending when noted

**Companies not included in our 2014 analysis

Source: Rudd Center analysis of Nielsen data (2014)

Snapple spent \$3.0 million in brand-level advertising on radio and \$1.4 million in outdoor ads.

Brands with the greatest change in advertising spending. From 2010 to 2013, just seven brands across all drink categories increased their total advertising spending by \$5 million or more (see **Table 20**). The \$90 million increase in Pepsi spending far surpassed any other brand. Four additional brands increased advertising spending by more than \$15 million, including one other PepsiCo brand (Mtn Dew), two energy drink brands (Red Bull and SK Energy), and Snapple.

In contrast, many more sugary drink brands reduced advertising spending by \$5 million or more (see **Table 21**). Coca-Cola had the biggest reduction of \$58 million, and 7UP and Vitamin Water both reduced their spending by \$15 million or more. In addition, six brands that spent more than \$5 million on advertising in

2010 eliminated virtually all advertising in 2013 (Minute Maid fruit drink, AMP Energy, Sunkist regular soda, SoBe, Celsius energy drink, and Swiss Premium iced tea).

Summary of advertising spending

Beverage companies spent \$814 million to advertise sugary drinks and energy drinks in 2013, a decline of 3% versus 2010. Further, companies spent \$52 million in brand-level advertising for sugary drinks. In contrast, they spent \$465 million to advertise other beverages, including diet drinks, 100% juice, and plain water, 3% less than spent in 2010. Although overall spending declined for sugary drinks as well as non-sugar drinks, there was considerable variation across categories. Spending on both regular soda and energy drink advertising increased 9%, and diet soda spending increased

17%. In addition, advertising for light juices (i.e., juice with water and zero-calorie sweeteners) more than tripled. In contrast, advertising for all other drink categories decreased, ranging from small reductions for plain water (-3%) and sports drinks (-5%) to substantial reductions for 100% juice (-29%), fruit drinks (-40%), and other diet drinks (-48%). Overall, 31% of advertising spending for all drink categories in 2013 promoted regular soda and soda brands and 13% promoted energy drinks, while 35% promoted other non-sugar-sweetened drinks. The healthiest drinks (i.e., 100% juice and plain water) represented just 10% and 4% of total advertising spending, respectively. Excluding brand-level advertising, sugary drinks outspent water and 100% juice by 4.2 to 1.

The three largest beverage companies (Coca-Cola, Dr Pepper Snapple Group, and PepsiCo) were responsible for 70% of advertising spending on sugary drinks in 2013, and two energy drink companies (Innovation Ventures [5-hour Energy]

and Red Bull) were responsible for another 17%. Change in advertising spending from 2010 to 2013 varied greatly by company. Coca-Cola and Dr Pepper Snapple Group both reduced advertising for sugary drinks in 2013 relative to 2010, by 35% and -13%, respectively. In contrast, PepsiCo more than doubled spending on regular soda and overtook Coca-Cola as the company with the most sugary drink advertising spending in 2013.

Four brands dominated advertising spending in 2013: Pepsi (\$139 million, +181%), Gatorade (\$108 million, -4%), Coca-Cola (\$100 million, -24%), and 5-hour Energy (\$99 million, -8%). Snapple advertising (including both iced tea and brand-level advertising) was also notable for a 213% increase in spending over 2010. Kraft Foods' Kool Aid was the only children's product in the advertising spending top-ten brands (\$29 million, +19%), with approximately one-half devoted to magazine advertising.

TV advertising exposure

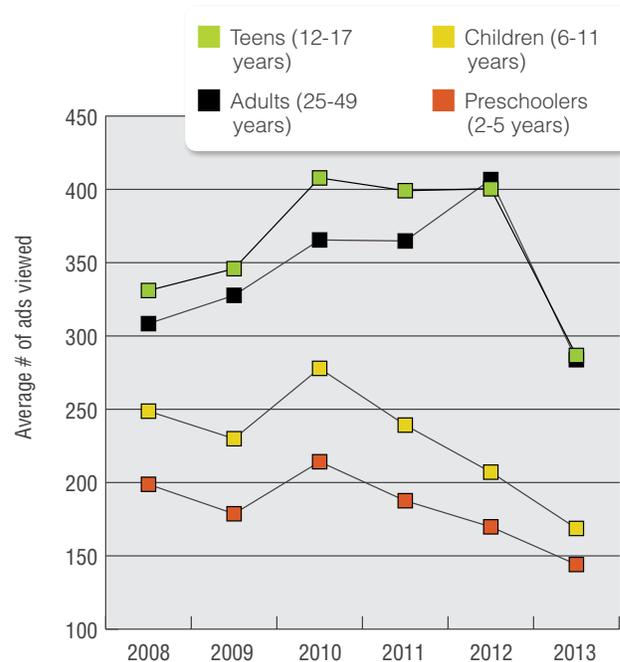
TV advertising exposure Definition

Gross rating points (GRPs)	Measure of the per capita number of TV advertisements viewed by a specific demographic group over a period of time across all types of programming. GRPs for specific demographic groups are also known as targeted rating points (TRPs).
Average advertising exposure	GRPs divided by 100. Provides a measure of the number of ads viewed by individuals in a specific demographic group, on average, during the time period measured.
Targeted ratios: Preschooler to adult Child to adult Teen to adult	A measure of relative exposure by youth versus adults, calculated by dividing GRPs for preschoolers (2-5 years), children (6-11 years), or teens (12-17 years) by GRPs for adults (25-49 years).

From 2010 to 2013, there was a marked decline in TV advertising for sugary drinks (including brand-level advertising) and energy drinks viewed by all age groups. Preschoolers viewed 33% fewer of these ads in 2013 than they had in 2010, children viewed 39% fewer, and teens viewed 30% fewer. TV ads viewed by adults also went down by 22%. However, young people continued to view these ads multiple times per week, ranging from 2.8 and 3.2 ads per week for preschoolers and children on average, to 5.5 ads per week for teens. Of note, in 2010 teens saw 12% more ads for sugary drinks and energy drinks compared to adults (407.8 for teens vs. 365.5 for adults), whereas in 2013 teens and adults had equivalent levels of exposure (286.7 vs. 283.8).

Examination of TV advertising to youth for sugary drinks and energy drinks over the past six years also shows positive long-term trends (see **Figure 9**). For children, TV ads viewed increased from 2008 to 2010, but then declined steadily from 2010 to 2013. Compared with 2008, preschoolers and children viewed 28% and 32% fewer ads, respectively, in 2013. TV ads viewed by teens also grew steadily from 2008 to 2010, but remained at the same level from 2010 to 2012. However, TV advertising to teens then dropped substantially from 2012 to 2013 (-28%). Compared with 2008, teens viewed 13% fewer ads in 2013.

Figure 9. Trends in exposure to TV ads for sugary drinks and energy drinks by age



Source: Rudd Center analysis of Nielsen data (2014)

Table 22. TV advertising exposure for children by sugary drink and energy drink category

Category	Average # of ads viewed						2013 targeted ratios	
	Preschoolers (2-5 years)			Children (6-11 years)			Preschooler: adult	Child: adult
	2010	2013	Change	2010	2013	Change		
Children's drinks	86.3	35.7	-59%	118.8	45.6	-62%	2.0	2.5
Regular soda	48.3	39.0	-19%	62.2	43.0	-31%	0.4	0.4
Energy drinks	45.8	34.5	-25%	55.1	40.1	-27%	0.4	0.5
Sports drinks	10.8	14.1	+31%	14.3	17.6	+23%	0.4	0.5
Iced tea	6.3	7.2	+14%	7.9	8.0	+2%	0.4	0.4
Other fruit drinks	11.1	6.4	-43%	12.9	6.1	-52%	0.3	0.3
Other sugary drink brands	0.3	3.4	1098%	0.3	4.1	1128%	0.4	0.5
Other flavored water	4.8	3.3	-31%	5.6	3.5	-37%	0.5	0.5
Soda brands	0.4	0.5	+17%	0.6	0.6	-10%	0.5	0.5
Total	214.1	144.1	-33%	277.7	168.7	-39%	0.5	0.6

Disproportionately high targeted ratios in bold
Source: Rudd Center analysis of Nielsen data (2014)

TV advertising by drink category

In 2013, children's drinks (including fruit drinks and flavored water) represented approximately one-quarter of TV ads for sugary drinks and energy drinks viewed by preschoolers and children (see **Table 22**). Regular soda and energy drinks each contributed another one-quarter of ads viewed. Of note, preschoolers saw slightly more ads for regular soda than for children's drinks. Sports drinks followed at approximately 10% of ads viewed, and then iced tea and other fruit drinks (5% and 4% of ads viewed, respectively). The remaining 5% of ads viewed consisted of brand-level ads for soda and other sugary drinks and ads for flavored water. Not surprisingly, preschoolers and children saw twice and 2.5 times as many ads for children's drinks compared with adults. In contrast, they viewed half as many (or fewer) ads for all other sugary drink and energy drink categories.

Compared with 2010, preschoolers and children saw fewer ads for most sugary drink and energy drink categories in 2013. The most dramatic decline was for children's drinks, with a reduction of more than half. Ads viewed for other fruit drinks and flavored water (not children's drinks) were reduced by approximately one-third to one-half the amount seen in 2010. Regular soda and energy drink ads also went down, but at a somewhat lower rate (19% to 31%). On the other hand, children saw more TV ads for sports drinks and iced tea in 2013 than in 2010. There was also a large increase in brand-level ads viewed for other sugary drink brands, although these ads accounted for a small (2%) share of sugary drink and energy drink ads viewed overall.

In contrast, children's drinks represented just 10% of ads viewed by teens, whereas energy drinks were the most viewed category (34% of ads viewed), followed by regular soda (30%) (see **Table 23**). Sports drinks contributed 12% of ads viewed, also ahead of children's drinks. All other categories, including brand-level ads, represented 5% or less of ads viewed by

Table 23. TV advertising exposure for teens by sugary drink and energy drink category

	Average # of ads viewed			2013 targeted ratios
	Teens (12-17 years)			Teen:adult
	2010	2013	Change	
Energy drinks	126.3	97.7	-23%	1.2
Regular soda	121.5	85.3	-30%	0.9
Sports drinks	32.5	34.0	+5%	1.0
Children's products	81.4	29.1	-64%	1.6
Iced tea	12.3	14.1	+15%	0.7
Other flavored water	14.9	9.9	-34%	1.4
Other fruit drinks	17.3	8.2	-52%	0.4
Other sugary drink brands	0.5	7.6	+1504%	0.9
Soda brands	1.1	0.8	-32%	0.7
Total	407.7	286.7	-30%	1.0

Disproportionately high targeted ratios in bold
Source: Rudd Center analysis of Nielsen data (2014)

teens. Further, for all categories except iced tea, teens saw disproportionately more of these ads compared with adults. As teens spend 30% less time watching TV than adults do,³ a teen to adult targeted ratio of 0.9 or higher indicates that companies purchased advertising in media viewed more often by teens relative to adults. Of note, teens viewed 20% more energy drink ads compared with adults and 40% more ads for flavored waters (excluding children's products).

From 2010 to 2013, changes in teens' exposure to TV ads for sugary drink categories and energy drinks were similar to changes in children's exposure. Ads for children's drinks and other fruit drinks went down by one-half to two-thirds, while advertising for energy drinks and regular soda declined by 23% and 30%, respectively. On the other hand, ads for sports drinks and iced tea increased, and brand-level ads for other sugary drinks showed a very large increase.

Table 24. TV advertising exposure for other drink categories

Category	Average # of ads viewed									2013 targeted ratios		
	Preschoolers (2-5 years)			Children (6-11 years)			Teens (12-17 years)			Preschooler: adult	Child: adult	Teen: adult
	2010	2013	Change	2010	2013	Change	2010	2013	Change			
100% juice	62.1	50.8	-18%	76.8	54.7	-29%	101.6	63.4	-38%	0.5	0.6	0.7
Diet soda	20.8	27.5	+32%	24.9	28.2	+13%	46.1	56.2	+22%	0.4	0.4	0.7
Light juice	1.6	7.0	+328%	1.8	7.0	+278%	2.4	10.7	+352%	0.3	0.3	0.5
Plain water	4.1	7.9	+93%	4.7	4.4	-6%	6.5	5.4	-17%	0.7	0.4	0.5
Other diet drinks	3.8	0.0	-100%	4.0	0.0	-100%	6.5	0.0	-100%			
Total	92.5	93.2	+1%	112.2	94.3	-16%	163.1	135.8	-17%	0.5	0.5	0.7

Source: Rudd Center analysis of Nielsen data (2014)

TV advertising for other drink categories

In addition to sugary drinks and energy drinks, children saw approximately 1.8 TV ads per week for diet drinks, 100% juice, and plain water, and teens saw 2.6 of these ads per week. Approximately one-half promoted 100% juices, followed by diet soda (see **Table 24**). Plain water was the least advertised drink category. On average, children and teens viewed less than one TV ad for water every month. Notably, children and teens saw 30% or fewer ads for all other drink categories compared with adults. These findings contrast with the high teen to adult targeted ratios for sugary drink and energy drink categories.

Overall declines in TV advertising for diet and healthy drink categories from 2010 to 2013 were lower than declines in sugary drink and energy drink ads. Children and teens viewed 16% to 17% fewer TV ads for these drinks, while preschoolers saw 1% more ads in 2013 than in 2010. Most of this decline was due to fewer ads for 100% juice in 2013, but ads for plain water viewed by children and teens also declined. On the other hand, preschoolers viewed almost twice as many ads for plain water in 2013 compared with 2010. In addition, diet soda ads increased 13% for children and 32% for preschoolers, while ads for light juices increased up to four-fold.

Figure 10 provides the proportion of TV ads viewed by children and teens in 2013 for each drink category (including sugary drinks, energy drinks, and other drink categories). In 2013, preschoolers and children saw more ads for 100% juice than for any other drink category, while children's products (fruit drinks and flavored water) ranked second or third. This finding contrasts sharply with 2010, when children saw 55% more ads for fruit drinks compared with 100% juice. However, the number of soda ads combined (including regular, diet, and brand-level ads) exceeded 100% juice ads viewed by approximately 30%. As a proportion of TV advertising for all drink categories, 100% juice and plain water represented just 25% of ads viewed by preschoolers and 22% of ads viewed by children in 2013. For teens, these drink categories contributed just 16% of all beverage TV ads viewed in 2013. Teens saw more ads for energy drinks (23% of all beverage ads viewed), and ads for soda (including regular, diet, and brand-level ads) represented 34% of beverage ads viewed by teens.

TV advertising by company

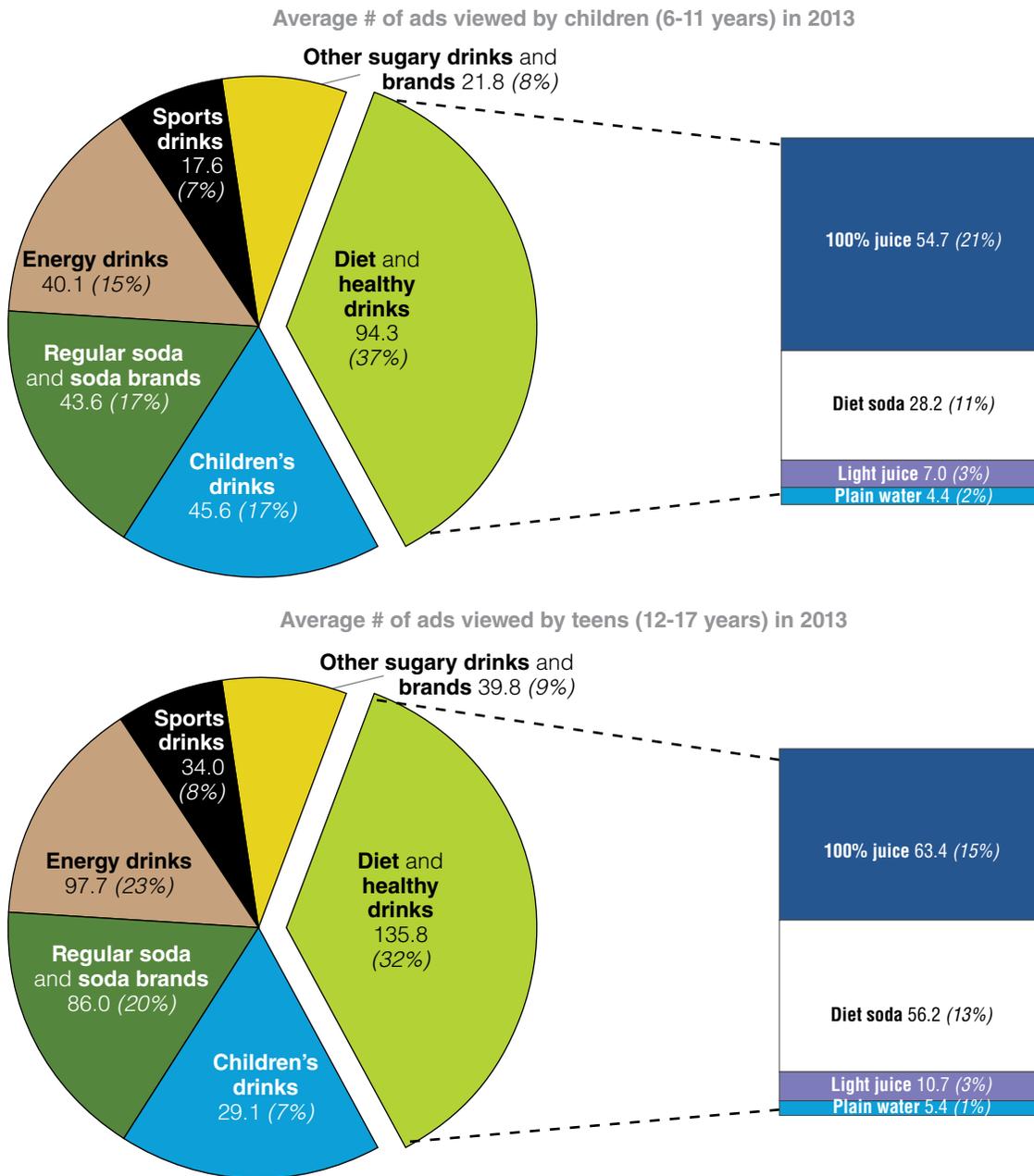
Despite the overall decline in TV advertising for sugary drinks and energy drinks from 2010 to 2013, there was substantial variation by company (see **Figure 11**). For both children and teens, PepsiCo was responsible for more sugary drink advertising than any other company in 2013. The company overtook Kraft Foods, 5-hour Energy, and Dr Pepper Snapple Group, which each advertised more to children in 2010 than did PepsiCo. In total, PepsiCo increased TV advertising viewed by teens by 10% from 2010 to 2013, and advertising to preschoolers and children by 39% and 25%, respectively (see **Ranking Tables 4** and **5**). Red Bull was the only other company to increase TV advertising to youth, with increases in ads viewed of 68% for teens, 59% for children, and 72% for preschoolers.

In contrast, Kraft Foods advertising to youth declined approximately two-thirds from 2010 to 2013 for all age groups. The company had ranked first in advertising to preschoolers and children in 2010, but fell to second in 2013. Most other companies in our analysis reduced sugary drink TV advertising to children and teens by 30% or more. Of note, Coca-Cola Co. advertised approximately 50% less to youth on TV in 2013 than in 2010. Only Unilever's advertising remained relatively stable, showing declines of 3% and 16% in ads viewed by teens and children, respectively.

TV advertising by brand

Ranking Tables 4 and **5** also present children's and teens' exposure to TV advertising for individual drink brands. From 2010 to 2013, there were substantial changes in the brands advertised most to children and teens. Of the 20 brands advertised most in 2013, two were not advertised in 2010 (Capri Sun Roarin' Waters and Sun Drop soda), and another five increased their advertising to children and teens by 25% or more (Gatorade, Pepsi, Red Bull, Mtn Dew, and Snapple). However, the majority of the top brands substantially reduced their TV advertising to children and teens in 2013 versus 2010.

Figure 10. Child and teen exposure to TV advertising for all drink categories



Source: Rudd Center analysis of Nielsen data (2014)

Children's drinks

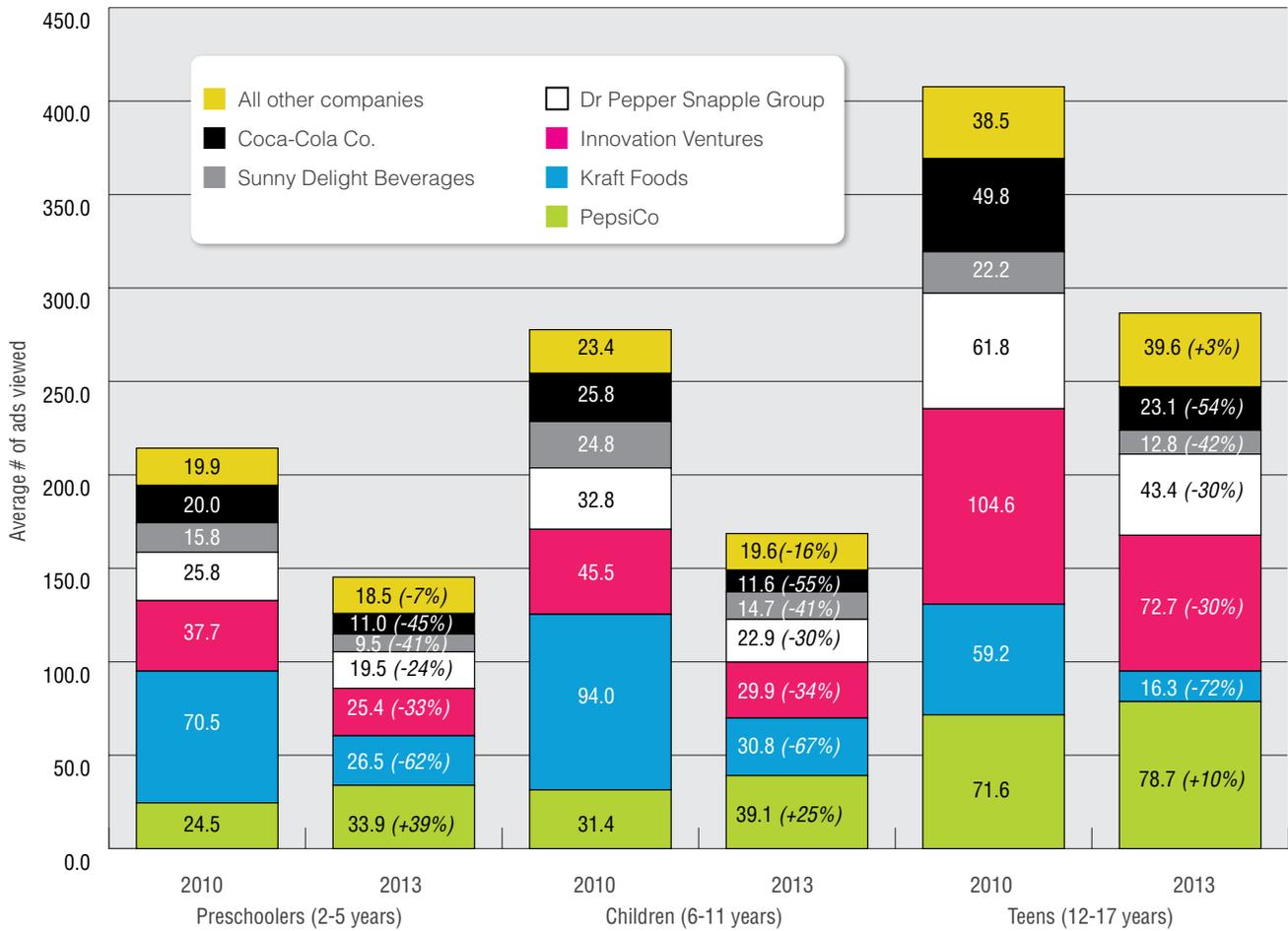
Three children's brands advertised on TV in 2013: Capri Sun and Kool-Aid from Kraft Foods and Sunny D fruit drink. Two children's drinks - Capri Sun Roarin' Waters and Sunny D - ranked second and fourth respectively in advertising exposure for children. On the other hand, Kraft virtually discontinued TV advertising to children for both Kool-Aid and Capri Sun fruit drinks, with declines of more than 90% in ads viewed by children in 2013 versus 2010. Of note, these two brands ranked first and third in TV advertising to children in 2010. Sunny D advertis-

ing also declined over 40% in 2013 versus 2010. In addition, Kraft Foods advertised another Capri Sun product in 2013: Capri Sun Super V 100% juice blend, although children saw 25% fewer ads for Super V relative to Capri Sun Roarin' Waters.

Energy drinks

Two energy drink brands made the top-ten list of brands advertised to both children and teens. In 2013, youth viewed more TV advertising for 5-hour Energy than any other brand in this analysis: preschoolers viewed 25 5-hour Energy ads,

Figure 11. Sugary drink and energy drink TV advertising viewed by youth by company



Source: Rudd Center analysis of Nielsen data (2014)

children viewed 30 ads, and teens viewed 73 ads. 5-hour Energy also ranked number one in ads viewed by teens in 2010, and number two for children. In addition, Red Bull energy drinks made the top-ten list, ranking number six in TV advertising to children and number four for teens. NOS (from Coca-Cola) was the only other energy drink with TV advertising in 2013, but on average children and teens viewed less than one ad for this product. From 2010 to 2013, 5-hour Energy reduced its TV advertising to youth by approximately one-third. However, as noted, Red Bull TV advertising viewed by children and teens increased by approximately two-thirds.

Regular soda

Three regular soda brands ranked in the top-ten brands advertised to both children and teens on TV in 2013: Pepsi, Mtn Dew, and Dr Pepper. Coca-Cola ranked tenth for children and eleventh for teens.

From 2010 to 2013, Pepsi regular soda advertising to children almost tripled, and Pepsi advertising to teens increased by 146%. Further, Mtn Dew (another PepsiCo brand) increased advertising by approximately two-thirds for children and teens. Of note, Pepsi TV advertising in 2013 promoted both Pepsi

and Pepsi NEXT. The reduced-calorie Pepsi NEXT product comprised 46% and 47% of Pepsi ads viewed by children and teens. In addition, two-thirds of Mtn Dew advertising to youth promoted Mtn Dew Kickstart. In contrast, TV advertising for Dr Pepper and Coca-Cola regular soda declined by 24% to 56% for children and teens. Coca-Cola promoted its 9-ounce “mini” cans in 2013, but these ads represented approximately 1% of all Coca-Cola TV ads viewed by youth. TV advertising to children and teens also declined for two lemon-lime regular sodas: Coca-Cola’s Sprite (by approximately 80%) and PepsiCo’s Sierra Mist (by approximately 90%).

There were also some additions and deletions in regular soda brands that advertised on TV in 2013. Sun Drop from Dr Pepper Snapple Group did not advertise in 2010, but ranked ninth in TV advertising to teens in 2013. On the other hand, Dr Pepper Snapple Group did not advertise 7UP or Sunkist on English-language TV in 2013, whereas both products had been in the top-ten in TV advertising in 2010.

Other sugary drinks

PepsiCo’s Gatorade sports drink was also in the top-ten list of brands advertised to children in 2013, while Ocean Spray



A Snapple ad focused on natural ingredients, claiming the best stuff on earth just got better

fruit drinks and Coca-Cola's Vitamin Water were among the top-ten brands advertised to teens. Ocean Spray fruit drinks ranked number nine for children and number 12 for teens, while Coca-Cola's Vitamin Water ranked number 15 for children and number 10 for teens. Of note, Gatorade TV advertising to children increased by 26% from 2010 to 2013, compared to a 6% increase in advertising to teens during the same period. In addition, Gatorade did not advertise its reduced-calorie G2 product on TV in 2013, although it had in 2010. Advertising for

other top-ten brands went down, including Vitamin Water (by 14-24%) and Ocean Spray (by 21-27%).

One additional sugary drink brand – Snapple – dramatically increased its TV advertising from 2010 to 2013. Dr Pepper Snapple Group more than doubled Snapple TV advertising (including both brand-level and iced tea ads) to children and more than tripled advertising to teens. When combined, Snapple brand and iced tea ads ranked seventh in advertising to both children and teens 2013, outranking the company's Dr Pepper regular soda.

Youth-targeted TV advertising. Not surprisingly, children saw many more TV ads for Capri Sun and Sunny D children's products compared with adults (see **Table 25**). Capri Sun fruit drink and Roarin' Waters flavored water had the highest child to adult targeted ratios in our analysis: children saw almost ten times as many ads for Capri Sun fruit drink and seven times as many ads for Capri Sun Roarin' Waters than adults saw, indicating that most of this advertising appeared on children's television. Targeted ratios for Capri Sun Super V (100% juice blend) and Sunny D were lower; children saw 50% to 75% more ads for these products compared with adults. However, Kraft Foods appears to have stopped advertising Kool-Aid directly to children on TV as they saw approximately one-half the number of ads for this product compared with adults.

TV advertising for several sugary drinks and energy drinks also appeared to be targeted to teen viewers, evidenced by high teen to adult targeted ratios. Sun Drop regular soda had the highest teen-targeted ratio for any non-children's product. Teens saw more than twice as many of these ads compared to adults, and children also saw 10% more ads than adults. In addition, teens saw 40% more ads for Vitamin Water compared with adults. Of note, these two products also had higher teen to adult targeted ratios than Capri Sun Super V and Sunny D children's products. Both energy drink brands with high levels

Table 25. Child- and teen-targeted brands

Brand	Category	Preschoolers (2-5 years)		Children (6-11 years)		Teens (12-17 years)	
		Avg # ads viewed in 2013	Targeted ratio (vs adults)	Avg # ads viewed in 2013	Targeted ratio (vs adults)	Avg # ads viewed in 2013	Targeted ratio (vs adults)
Child-targeted							
Capri Sun	Fruit drink	0.5	7.1	0.7	9.6	0.3	3.7
Capri Sun Roarin' Waters	Flavored water	24.0	5.7	28.8	6.9	14.3	3.4
Capri Sun Super V	100% juice	17.3	1.5	21.3	1.9	15.3	1.3
Sunny D	Fruit drink	9.3	1.0	14.7	1.5	12.8	1.3
Teen-targeted							
Sun Drop	Regular soda	3.9	0.8	5.4	1.1	11.3	2.3
Vitamin Water	Flavored water	3.3	0.5	3.5	0.5	9.9	1.4
Red Bull	Energy drink	8.7	0.4	9.7	0.5	24.4	1.3
5-hour Energy	Energy shot	25.4	0.4	29.9	0.5	72.7	1.2
Sprite	Regular soda	0.9	0.4	1.0	0.5	2.6	1.2
Gatorade	Sports drink	13.7	0.4	17.2	0.5	33.4	1.1
Mtn Dew Kickstart	Regular soda	4.0	0.6	4.6	0.4	11.6	1.1

Source: Rudd Center analysis of Nielsen data (2014)



Capri Sun Roarin' Waters child-targeted TV ads

Capri Sun Super V child-targeted TV ads



Mtn Dew Kickstart TV commercials with youth-oriented themes

of TV advertising in 2014 appeared to target their advertising to teens directly: compared with adults, teens saw 20% more ads for 5-hour Energy and 30% more ads for Red Bull. Sprite regular soda and Gatorade sports drink also appeared to target teens with targeted ratios of 1.2 and 1.1, respectively. Of note, Mtn Dew Kickstart ads had a targeted ratio of 1.1, while teens saw 7% fewer regular Mtn Dew ads compared with adults.

However, some of the brands with the most TV ads viewed by children and teens did not appear to purchase advertising targeted to them directly, as adults saw even more of these ads. For example, adults saw twice as many ads for Pepsi, Dr Pepper, and Coca-Cola regular sodas than did teens, and more than three times as many ads for Ocean Spray fruit drinks.

Summary of TV advertising exposure

In 2013, there was a notable decline in total youth exposure to TV advertising for sugary drinks and energy drinks; teens viewed 30% fewer of these ads relative to 2010 and children

viewed 39% fewer. However, preschoolers, children, and teens continued to see 144, 169, and 287 ads, respectively, for unhealthy drinks.

Exposure to advertising for children's drinks decreased the most, by approximately 60% for all age groups. Exposure also fell for regular soda, energy drinks, other fruit drinks, and flavored water advertising, as well as ads for 100% juice, plain water, and other diet drinks (not diet soda). However, relative to 2010, youth exposure to ads for sports drinks and iced tea increased. Young people also saw more TV advertising for diet soda and light juice in 2013 than in 2010. Of all drink types, the most viewed category was 100% juice for preschoolers and children (approximately one out of five ads viewed). However, sugary drinks and energy drinks contributed approximately two-thirds of all beverage ads viewed by children. For teens, energy drinks followed by regular sodas were the most viewed categories, while 100% juice and plain water contributed just 16% of total beverage ad exposure.

Among sugary drink and energy drink brands, 5-hour Energy was the most advertised product to all age groups on TV, and Gatorade and Pepsi ranked in the top-five. Capri Sun Roarin' Waters and Sunny D also ranked in the top-five for preschoolers and children, while Red Bull and Mtn Dew rounded out the top-five sugary drink brands viewed by teens. Notably, PepsiCo and Red Bull were the only companies to increase sugary drink advertising to children and teens in 2013 versus 2010. On TV, PepsiCo increased its sugary drink advertising to preschoolers and children by 39% and 25%, respectively, and Red Bull increased advertising to all youth by 59% or more.

Not surprisingly, advertising for two children's brands (Capri Sun and Sunny D) appeared to target children, as children viewed at least 50% more of these ads than adults viewed. However, several products also appeared to be targeted to teens, including Sun Drop, Sprite, and Mtn Dew Kickstart sodas, Red Bull and 5-hour Energy drinks, Vitamin Water, and Gatorade. Of note, one juice product (Capri Sun Super V) also was targeted to children. However, for diet drinks, 100% juice, and plain water, children and teens saw 30% to 70% fewer ads compared with adults.

Brand appearances on prime-time TV

TV brand appearances	Definition
Brand appearance	An occasion when a brand or product is conveyed, visually and/or audibly, during the entertainment content of a TV program. To be counted, 50% or more of a brand logo or product name must be visible. Only prime-time TV programming is included in these analyses. Most brand appearances are product placements, but some appearances may not be the result of paid efforts by advertisers.
Number of telecasts	The number of individual telecasts featuring any appearance for a particular company, brand, or product.
Total screen time	The cumulative amount of time a brand appeared on prime-time TV.
Average length per telecast	Calculated by dividing the total screen time by the number of telecasts. Provides the average length of time given to brand appearances for each telecast.
Gross rating points (GRPs)	Measure of the per capita number of prime-time brand appearances viewed by a specific demographic group over a period of time.
Appearances viewed	GRPs divided by 100. Provides a measure of the number of appearances viewed by individuals in a specific demographic group, on average, during the time period measured.

In addition to traditional TV advertising, sugary drink brands and energy drinks appeared in 2,102 different prime-time TV telecasts in 2013, up 33% from 2010. The average length of brand appearances was 25.7 seconds per telecast in 2013, more than double the average length in 2010 (12.1 seconds) and comparable to a 30-second commercial. In total, there were 900 minutes of sugary drink and energy

drink appearances on prime-time TV in 2013, representing an increase of 182% from 319 minutes in 2010.

As in 2010, regular soda and soda brands predominated accounting for 70% of telecasts with sugary drink appearances (see **Table 26**). From 2010 to 2013, the number of telecasts featuring energy drinks almost doubled, accounting for 13% of telecasts with brand appearances in 2013. Sports drinks

Table 26. Brand appearances on prime-time TV in 2010 and 2013 by drink category

Category	Number of telecasts			Average duration per telecast (sec)		
	2010	2013	Change	2010	2013	Change
Regular soda and soda brands	1080	1462	+35%	14.9	21.9	+47%
Other sugary drinks and brands*	326	365	+12%	5.9	51.7	+776%
Energy drinks	147	264	+80%	5.5	11.8	+113%
Flavored waters	25	11	-56%	14.0	8.7	-38%
Total sugary drinks and energy drinks	1578	2102	+33%	12.1	25.7	+112%
Diet soda	189	227	+20%	5.8	35.9	+522%
Plain water	369	363	-2%	16.1	20.3	+26%
100% juice	88	19	-78%	5.5	6.9	+26%
Total other drink categories	646	609	-6%	11.6	25.7	+121%

*Other sugary drinks and brands include sports drinks, iced teas, fruit drinks, and brands with products in these categories
Source: Rudd Center analysis of Nielsen data (2014)

Table 27. Beverage brand appearances viewed by children and teens in 2010 and 2013

Category	Average # of appearances viewed					
	Children (2-11 years)			Teens (12-17 years)		
	2010	2013	Change	2010	2013	Change
Regular soda and soda brands	18.3	12.5	-32%	24.4	20.1	-18%
Other sugary drinks and brands*	1.2	7.4	+517%	2.0	10.5	+411%
Energy drinks	0.5	1.0	+116%	0.8	2.6	+216%
Flavored water	1.7	0.0	-98%	2.4	0.1	-98%
Total sugary drinks and energy drinks	21.7	21.0	-3%	29.6	33.2	+12%
Diet soda	0.5	2.5	+395%	1.0	3.4	+230%
Plain water	2.5	1.9	-23%	3.7	5.5	+50%
100% juice	0.1	0.1	-55%	0.2	0.1	-43%
Total other drink categories	3.1	4.4	+44%	4.9	9.1	+84%

*Other sugary drinks and brands include sports drinks, iced teas, fruit drinks, and brands with products in these categories

Source: Rudd Center analysis of Nielsen data (2014)

and fruit drinks accounted for 5% and 6% of telecasts, respectively. Telecasts featuring flavored water or iced tea/coffee declined from 2010, each accounting for less than 1% of sugary drink appearances viewed in 2013. Finally, other sugary drink brands (e.g., Snapple and SoBe with products in multiple drink categories) made up the remaining 13% of telecasts with sugary drink appearances.

In addition to those featuring sugary drinks, 609 prime-time telecasts featured appearances by beverages in other drink categories (including diet soda, plain water, and 100% juice) totaling 260.9 minutes of prime-time viewing. Diet soda was the prominent other drink category accounting for 52% of screen time, and plain (including mineral) water contributed another 47%. Fruit juice made up less than 1% of screen time. However, regular soda brands alone were featured in over twice the amount of screen time as all non-sugar-sweetened drink categories combined, and sugary drinks and energy drinks as a whole eclipsed other drinks by a factor of 3.5 to 1.

Children (2-11 years) viewed on average 21 sugary drink appearances in 2013, reflecting a 3% decrease from 2010 (see **Table 27**). On the other hand, teens (12-17 years) viewed 33 appearances, up 12% from 2010. As in 2010, children and teens viewed the most appearances for regular soda and soda brands in 2013, comprising almost half of all beverage appearances viewed. However, there was a reduction in appearances viewed for the soda category, whereas appearances viewed for other drink categories increased substantially. For example, children and teens viewed 12 to 15 times the number of appearances for other categories of sugary drinks (e.g., sports drinks, iced tea) in 2013 versus 2010. These drinks achieved roughly half the amount of appearances viewed as regular soda despite less than one-tenth the number of telecasts. Energy drinks also showed substantial increases in brand appearances viewed. Children saw twice as many appearances for energy drinks in 2013 versus 2010, while teens' exposure tripled. For the remaining beverage categories (sports drinks, fruit drinks,

flavored water, and iced tea/coffee), children and teens saw less than one appearance each.

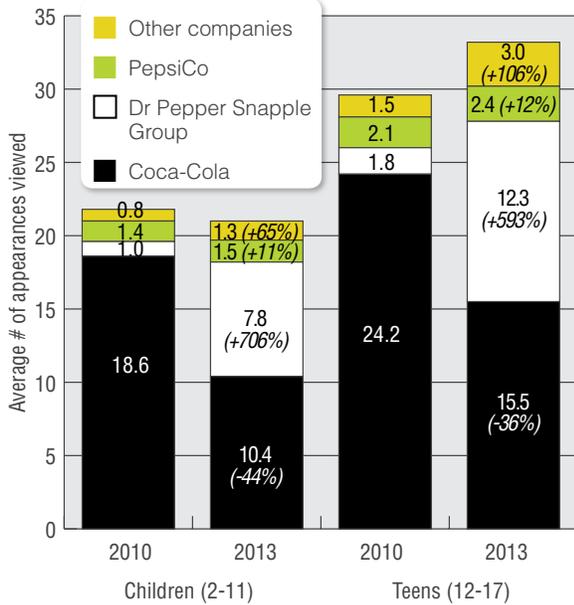
Diet soda and plain water also had relatively high numbers of appearances viewed by children and teens; both exceeded energy drink appearances viewed. Of note, children viewed more appearances for diet soda than water, while teens viewed more water appearances. Further, appearances viewed for diet soda more than tripled from 2010 to 2013 for children and teens, while plain water appearances increased by 50% for teens, but declined for children.

Beverage appearances by company

Thirty-seven brands from 12 companies appeared on prime-time TV in 2013; approximately one-third of the brands in our analysis (see **Ranking Table 6**). In 2010, Coca-Cola brand led in drink appearances on prime-time TV, with 61% of screen time and over 70% of appearances viewed by children and teens. However, brand appearances in 2013 were distributed across several companies and brands.

At the company level, Coca-Cola continued to rank first, totaling 401.6 minutes of prime-time TV in 2013, an increase of 92% over 2010. However, these appearances resulted in just 10 and 16 appearances viewed by children and teens respectively, a reduction of approximately 40% versus 2010 (see **Figure 12**). This decline in the number of appearances viewed was due to fewer youth viewers of programs where Coca-Cola appeared (primarily American Idol). Notably, Dr Pepper Snapple Group moved up to second place at 393.6 minutes of prime-time appearances in 2013, an eleven-fold increase over 2010. Children and teens viewed 8 and 12 of these appearances for Dr Pepper Snapple Group products in 2013, six and eight times as many appearances viewed in 2010. PepsiCo accounted for 6% of total screen time and approximately 2 appearances viewed by children and teens, a small increase of just over 10%. Monster Beverage Corporation, Kraft Foods, and Red Bull ranked fourth through

Figure 12. Brand appearances viewed by children and teens in 2010 and 2013 by company



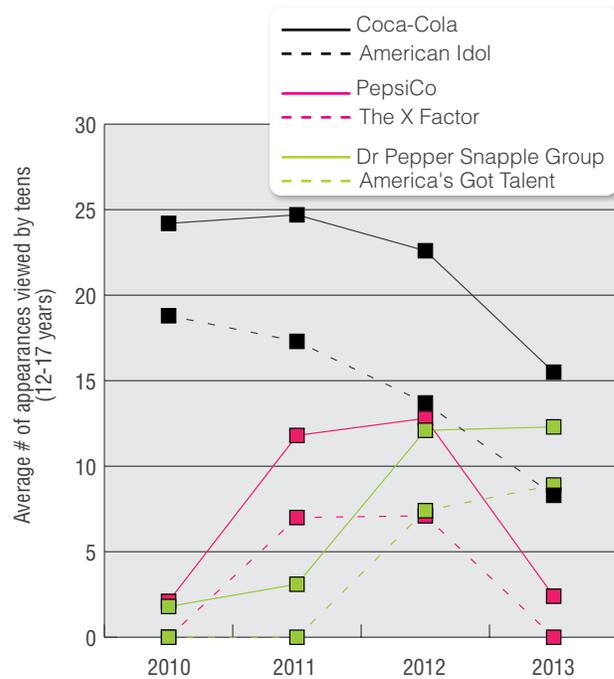
Source: Rudd Center analysis of Nielsen data (2014)

sixth in screen time and brand appearances viewed, but each accounted for less than 4% of total screen time. In 2013, teens viewed slightly more than one for Monster Energy, and less than one appearance each for the remaining companies.

Beverage appearances by brand

In comparing appearances for individual brands, Snapple had the most screen time, totaling 299.1 minutes of prime-time viewing with an average of over 2.5 minutes per telecast. The increased dominance of Snapple was reflected in a 78% increase in the number of telecasts from 2010 and a 1367% increase in the average duration per telecast from 10.8 to 158.8 seconds, equivalent to more than five 30-second TV commercials. Children and teens saw 7 and 9 appearances for Snapple, respectively in 2013, an increase of 16 and 14 times the number of appearances viewed in 2010. Coca-Cola brand dropped to number two in screen time in 2013. However, children and teens still saw 9 and 11 Coca-Cola brand appearances in 2013, slightly more than for Snapple. Another Coca-Cola brand, Sprite, ranked third in screen time and appearances viewed, followed by 7UP (Dr Pepper

Figure 13. Sugary drink appearances viewed for companies from 2010 to 2013, with proportion of appearances from top programs



Source: Rudd Center analysis of Nielsen data (2014)

Snapple Group) and Pepsi regular soda. On average, teens also saw more than one appearance for Monster Energy and Dr Pepper soda in 2013.

Analysis of the programs where sugary drink brands appeared revealed that reality shows were the major vehicle for appearances viewed by youth. Appearances on American Idol (Coca-Cola), America's Got Talent (Snapple), and The X Factor (Pepsi) accounted for more than half of each company's prime-time brand appearances viewed by teens (see **Figure 13**), as well as by children. In 2013, 54% of Coca-Cola appearances viewed by teens occurred on American Idol, down from 78% in 2010. Dr Pepper Snapple Group's substantial increase in brand appearances was largely attributable to Snapple placements on America's Got Talent, representing 72% of Snapple appearances viewed by teens in 2013. In 2011 and 2012, Pepsi had significant placements viewed on The X Factor, but teen viewers for this program appeared to decline in 2013. In 2013, appearances



Brand appearances on America's Got Talent, American Idol, and The X Factor

on American Idol and America's Got Talent made up 65% of all sugary drink appearances viewed by children and 52% of appearances viewed by teens.

The sitcom, The Big Bang Theory, also contributed a significant number of appearances viewed in 2013. Children and teens saw an average of 3 and 9 appearances for sugary drinks on this one program, which made up a substantial proportion of appearances for several top-ten brands. In 2013, Sprite totaled 2 and 4 appearances viewed for children and teens, and 7UP had almost one and two, respectively. For these two soda brands, The Big Bang Theory made up from 81% to 92% of the appearances viewed. In addition, 99% of Monster Energy appearances viewed by children and teens occurred on The Big Bang Theory. Roughly one-third of appearances viewed for Red Bull energy drinks were also from this program. Appearances for all sugary drink and energy drink brands on the Big Bang Theory made up 15% of appearances viewed by children and 28% of appearances viewed by teens.

Summary of brand appearances on prime-time TV

One-third of the beverage brands included in this report had prime-time TV appearances in 2013, totaling 2,102 appearances and 900 minutes of screen time. Children and teens viewed 21 and 33 of these appearances, respectively. Although the number of appearances viewed by children declined slightly from 2010 to 2013, appearances viewed by teens increased 12%. Sugary drink and energy drink appearances greatly outnumbered appearances for diet soda, 100% juice, and water. As in 2010, regular soda and soda brands were the most prominent drink category. Teens did see 50% more appearances for plain water in 2013 than in 2010, although children saw fewer. Snapple and Coca-Cola together accounting for 73% of appearances viewed by children and 60% of those viewed by teens in 2013 for the sugary drink brands in our analysis. The primary venues in 2013 for sugary drink appearances viewed by children and teens were product placements on talent shows (American Idol and America's Got Talent, as well as The X Factor from 2011 to 2012) and The Big Bang Theory. These programs accounted for over three quarters of all appearances viewed by children and teens.

Traditional advertising

Signs of progress

- From 2010 to 2013, there was a 7% reduction in advertising spending devoted to sugary drinks and energy drinks (including brand-level spending), and an even greater decline in TV advertising to youth. Preschoolers, children, and teens saw 33%, 39%, and 30% fewer of these ads in 2013 than in 2010. For all age groups, advertising exposure also declined versus 2008.
- Especially notable was the decline in exposure to TV advertising for children's drinks (including fruit drinks and flavored water). Compared with 2010, preschoolers and children saw approximately 60% fewer ads for these products, including reductions for the three children's drinks advertised most in 2010 – Capri Sun fruit drink (-99%), Kool-Aid (-97%), and Sunny D (-41%). Of note, Kraft Foods also advertised its Capri Sun Super V fruit and vegetable juice blend to children, the only child-targeted 100% juice product in 2013.
- Two of the largest beverage companies substantially reduced advertising for their sugary drink products in 2013 versus 2010. Coca-Cola's sugary drink advertising spending declined by 35%, a reduction of \$100 million, and children and teens saw 41% and 53% fewer of these ads on TV in 2013. Coca-Cola brands with the greatest declines in TV advertising to youth included Coca-Cola and Sprite regular sodas and Vitamin Water. Dr Pepper Snapple Group also reduced advertising spending for sugary drinks by 13% in 2013 compared with 2010, and youth exposure to TV advertising for Dr Pepper regular soda declined by approximately one-third.
- Compared with 2013, youth exposure to diet drinks, 100% juice, and plain water ads on TV remained flat or declined. As a result, the proportion of beverage ads viewed by children on TV devoted to sugary drinks and energy drinks declined from approximately 70% in 2010 to 62% for children in 2013. In 2013, preschoolers and children saw more ads for 100% juice than for any other drink category (approximately one in five beverage ads viewed), while children's fruit drinks were the most-viewed category in 2010. Preschoolers also saw almost twice as many ads for plain water in 2013.

Continued reasons for concern

- Despite overall declines in advertising of sugary drinks and energy drinks from 2010 to 2013, there were exceptions. Most notably, in contrast with its main competitors, PepsiCo increased advertising spending by 32% for its sugary drink brands, spending \$90 million more to advertise Pepsi sugar-sweetened sodas (including regular Pepsi and Pepsi NEXT) alone in 2013 compared with 2010. Youth exposure to TV advertising for Pepsi more than tripled for children and increased 146% for teens. Children's and teens' exposure to TV advertising for Mtn Dew regular soda (including Kickstart) also increased by 44% or more, and children's exposure to Gatorade advertising increased by 26%. Gatorade and Pepsi ranked among the five brands advertised most to children and teens, and Mtn Dew also ranked fifth in advertising to teens.

Continued reasons for concern (continued)

- Advertising of energy drinks to youth also remained a significant concern. Children and teens saw more TV advertising for 5-hour Energy than any other single brand. Red Bull also ranked highly with 9 ads viewed by preschoolers and 24 viewed by teens. While 5-hour Energy reduced its advertising in 2013 versus 2010, Red Bull increased advertising spending by 84% and TV advertising to youth by 59% or more. Further, both companies appeared to target their TV advertising to a teen audience, as teens saw 20% to 30% more of these ads compared with adults. Although not advertised on English-language TV, SK Energy, a recently introduced energy shot, ranked ninth in advertising spending in 2013 at \$20 million, including \$3 million on radio.
- Three additional sugary drink brands notably increased their TV advertising to children and teens. Dr Pepper Snapple Group tripled advertising support for its Snapple brand (including iced tea and brand-level advertising) in 2013 versus 2010 (+\$19 million in spending), and Snapple TV advertising to youth increased four-fold. The company also relaunched its Sun Drop regular soda, specifically targeting teens, who saw more than twice as many of these ads compared with adults. In addition, Capri Sun Roarin' Waters, a reduced-sugar flavored water that also contains artificial sweeteners, was the most advertised children's drink, ranking second in TV advertising to children (behind 5-hour Energy).

Continued reasons for concern (continued)

- TV advertising to youth for 100% juice declined from 2010 to 2013, by 18% to 38%. Although preschoolers saw 93% more ads for plain water in 2013 than in 2010, children and teens saw from 6% to 17% fewer of these ads. In contrast, youth viewed 13% to 32% more ads for diet soda and three times as many ads for light juice.
- In 2013, Snapple and Pepsi also featured significant numbers of brand appearances in prime-time TV programming, whereas Coca-Cola was the primary sugary drink in this medium in 2010. Brand appearances for all sugary drinks and energy drinks increased by 33% from 2010 to 2013 and total screen time almost tripled. On average, children viewed 21 of these appearances in 2013 and teens viewed 33. Popular talent shows (American Idol and America's Got Talent) and one sitcom, The Big Bang Theory, were responsible for three-quarters of all appearances viewed by children and teens.

Digital media marketing

In this section, we examine four types of marketing used to promote sugary drinks and energy drinks in digital media: websites sponsored by beverage companies, display advertising on third-party websites, social media marketing,

and marketing on mobile devices. We evaluated digital marketing practices of the 102 sugary drink brands in our analysis, as well as four brands of energy shots.

Beverage company websites

Website exposure	Definition
Average monthly unique visitors	Average number of different individuals visiting the website each month. Data are reported for the following age groups: youth (2-17 years), children (2-11/12 years), and teens (12/13-17 years).*
Average visits per month	Average number of times each unique visitor visits the website each month.
Average pages per visit	Average number of pages viewed during each visit by each visitor to the website.
Average minutes per visit	Average number of minutes each visitor spends on the website each time he or she visits.
Targeted index by age	The percent of visitors to the website that are children or teens divided by the percent of child or teen visitors to the internet in total. A targeted index greater than 100 indicates that children or teens are more likely to visit the website compared to other websites.

*comScore changed its age breaks for children and teens in July 2013. From Jan-June 2013, 12-year-olds were classified as teens, but they were classified as children for the period July-Dec 2013.

In 2013, 12 of the companies in our analysis sponsored 50 different websites with enough youth visitors (ages 2-17 years) to obtain exposure data from comScore (see **Ranking Table 7**). At the company level, Innovation Ventures' one website (5HourEnergy.com) attracted the most youth visitors (averaging 128,000 per month). Coca-Cola Co. (with a total of 16 websites in our analysis) and PepsiCo (11 websites) followed with over 120,000 youth visitors monthly to the companies' multiple websites. Among companies, Red Bull's six websites combined ranked fourth, averaging more than 60,000 visitors per month under age 18, and Dr Pepper Snapple Group websites ranked fifth (28,000 youth per month). Coca-Cola websites combined continued to attract the most children under age 12, approximately 19,000 per month. In examining youth visitors to individual websites, three companies were responsible for 13 of the 20 websites with the most unique youth visitors in 2013: Coca-Cola (7 websites), PepsiCo (4 websites), and Red Bull (2 websites).

The number of youth visitors declined by 20% or more for more than half of the websites evaluated in both 2010 and 2013 (19 of 31). In addition, five of the websites on the top-20 list in 2010 were discontinued or did not have enough youth visitors to measure in 2013, including KraftBrands.com/CapriSun, KraftBrands.com/KoolAid, and PepsiCo's RefreshEverything.com, SoBe.com, and DEWmocracy.com. In general, child visitors to websites declined at a greater rate than teen visitors. In 2010, nine different beverage company websites averaged 5,000 or more child visitors per month, compared with just two websites in 2013 (MyCokeRewards.com and 5HourEnergy.com). However, youth visitors to eight websites increased by 20% or more from 2010 to 2013, and five of the top-20 websites in 2013 were new or did not have enough visitors in 2010 to measure.

Comparisons by brand

As noted, the most-visited individual website in 2013 was 5HourEnergy.com. MyCokeRewards.com ranked second in 2013 with 72,000 youth visitors per month. Of note, the site had 171,000 youth visitors per month in 2010 and was the most-visited site that year. Four additional websites averaged 20,000 or more youth visitors per month in 2013 – RedBull.com, Pepsi.com, RedBullUSA.com, and Gatorade.com. Additional websites in the 20 sites visited most often by youth included sites promoting energy drink brands (MonsterEnergy.com, RockstarMayhemFest.com, DrinkNOS.com), regular soda brands (DrPepper.com, MountainDew.com, Coca-Cola.com), other sugary drink brands (Gatorade.com, VitaminWater.com, Snapple.com, OceanSpray.com, Welchs.com), and company-level websites from Coca-Cola and PepsiCo (PepsiCo.com, Coca-ColaCompany.com, Coca-ColaScholars.org, ICoke.com). MyCokeRewards.com and Coca-ColaScholars.com had the highest engagement with youth visitors, averaging seven minutes or more per visit, up from just over five minutes in 2010.

The number of youth visitors to several websites grew substantially from 2010 to 2013. Visitors to 5HourEnergy.com increased almost nine-fold, contributing to its rise from number 15 in 2010 to number one in 2013. Of note, 5HourEnergy.com attracted 260,000 unique youth visitors per month in the third quarter of 2013 alone. Visitors to RedBull.com almost tripled from 2010 to 2013, and visitors to Pepsi.com more than doubled. RedBull.com attracted over 54,000 unique teen visitors per month in the fourth quarter alone, almost double its visitors in other 2013 quarters. In addition, visitors to DrinkNOS.com increased 18-fold, while some top-20 sites in 2013 did not exist or did not have enough youth visitors to measure in 2010, including RedBullUSA.com (#5 in 2013), Coca-ColaCompany.com (#10), VitaminWater.com (#12), RockstarMayhemFest.com (#14), and ICoke.com (#19).

In contrast, child visitors to MyCokeRewards.com declined by over 70% and teen visitors declined 54% in 2013 compared to 2010. Other sites with notable declines in youth visitors included DrPepper.com (-58%), MonsterEnergy.com (-33%), and MountainDew.com (-31%).

Child visitors to websites

As in 2010, MyCokeRewards.com continued to attract the most child visitors in 2013 (12,600 children aged 2-11/12 per month). All Coca-Cola websites combined attracted 19,000 child visitors per month. 5HourEnergy.com ranked a close second

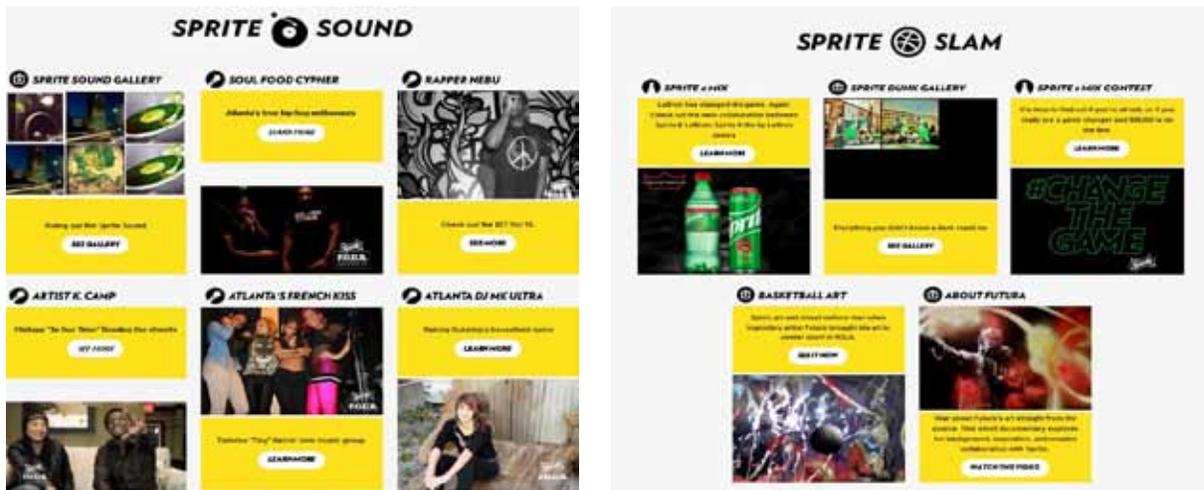
to MyCokeRewards.com with 11,400 child visitors per month. However, just six additional sites averaged 1,000 or more child visitors per month in 2013 (PepsiCo.com, Pepsi.com, RedBullUSA.com, DrPepper.com, RedBull.com, and Sprite.com). Of note, child visitors to PepsiCo.com tripled from 2010 to 2013, and child visitors to RedBull.com increased by 41%.

Compared with older internet visitors, relatively few children visited the websites in our analysis, with one exception. Children were equally likely to visit TumEYummies.com compared with all websites (see **Table 28**). This children's fruit drink website included a "For kids" advergaming section with links to "Char-

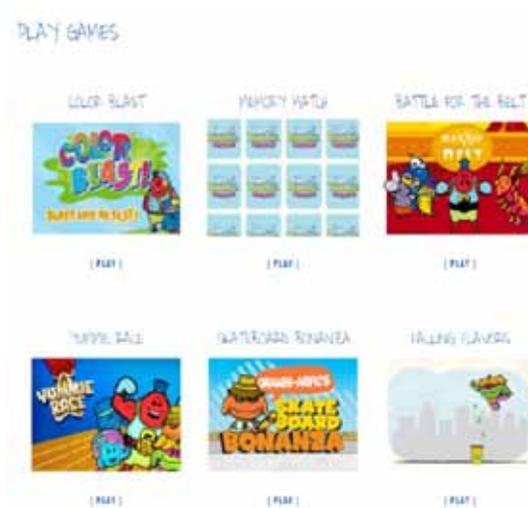
Table 28. Websites with the highest compositions of child visitors (2-11/12 years)

Rank	Company	Website	Average unique child visitors per month (000)	Targeted index
1	BYB Brands, Inc.	TumEYummies.com	0.7	97
2	Coca-Cola	Sprite.com	1.0	58
3	Arizona	DrinkArizona.com	0.6	35

Source: comScore Media Metrix Key Measures Report (2-11 years for January-June 2013 and 2-12 years for July-December 2013)



Sprite Sound and Sprite Slam on Sprite.com



Tum E Yummies "For kids" advergaming website

acters, games, and downloads.” Advergames are computer games designed to promote a brand. Children could download pictures to color or save them as desktop wallpaper. Sprite.com had the second highest child targeted index, although children were approximately half as likely to visit the site compared with all websites. This site included youth-oriented messages promoting music, style, and “slam” (i.e., basketball). All other websites had low child-targeted indices of 35 or less.

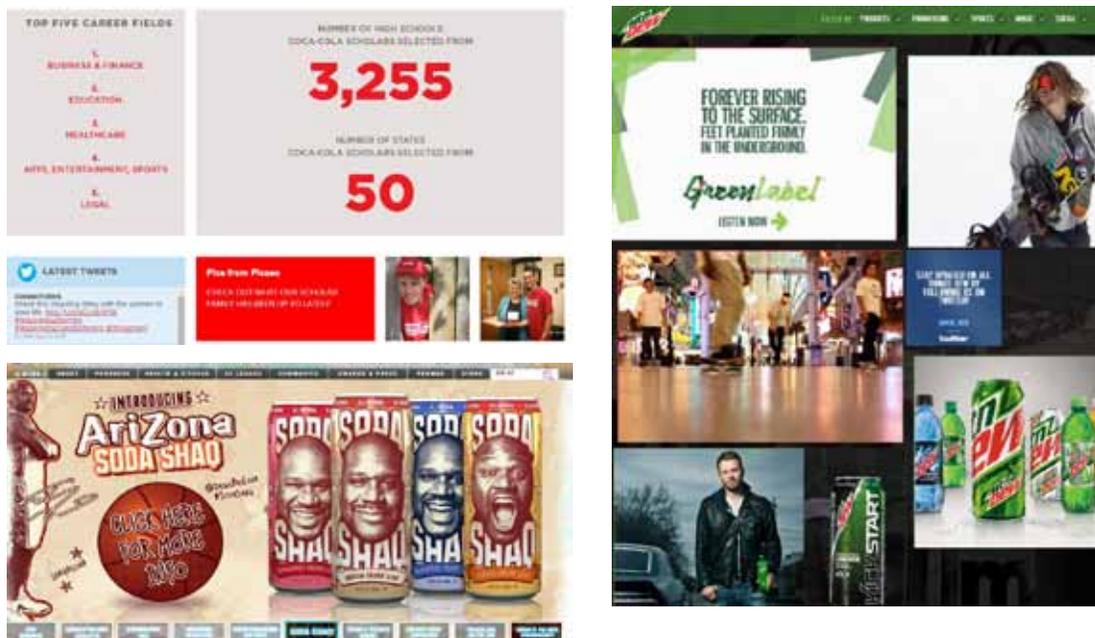
Teen visitors to websites

In contrast to children, teens made up a relatively high proportion of visitors to 20 of the 50 websites in our analysis, particularly those from Coca-Cola, PepsiCo, and Dr Pepper Snapple Group (see **Table 29**). Teens were more than three times as likely to visit Coca-ColaScholars.org and almost three times as likely to visit CrushSoda.com compared with the internet overall. They were also 75% or more likely to

Table 29. Websites with the highest compositions of teen visitors (12/13-17 years)

Rank	Company	Website	Average monthly unique teen visitors (000)	Targeted index
1	Coca-Cola	Coca-ColaScholars.org	10.3	325
2	Dr. Pepper Snapple Group	CrushSoda.com	1.1	257
3	PepsiCo	MountainDewGameFuel.com	0.2	186
4	Arizona Iced Tea	DrinkArizona.com	2.5	179
5	PepsiCo	GreenLabelArt.com	0.1	175
6	Coca-Cola	DrinkNOS.com	6.5	173
7	Coca-Cola	MyCoke.com	2.0	171
8	Coca-Cola	VitaminWater.com	9.3	169
9	Coca-Cola	Fanta.com	0.7	162
10	Innovation Venture	5HourEnergy.com	116.8	162
11	PepsiCo	Gatorade.com	21.6	159
12	Coca-Cola	ICoke.com	4.0	159
13	Red Bull	RedBullUSA.com	23.2	146
14	Dr. Pepper Snapple Group	DrPepper.com	16.1	135
15	Coca-Cola	Powerade.com	1.1	130
16	Monster Beverage Corporation	MonsterEnergy.com	15.5	127
17	PepsiCo	GreenLabelSound.com	0.4	122
18	Coca-Cola	Sprite.com	1.8	122
19	PepsiCo	AMPEnergy.com	0.7	121
20	Novamex	Jarritos.com	1.5	119

Source: comScore Media Metrix Key Measures Report (12-17 years for January-June 2013 and 13-17 years for July-December 2013)



Youth-oriented messages on websites visited relatively more often by youth under 18

visit MountainDewGameFuel.com, DrinkArizona.com, and GreenLabelArt.com (another Mtn Dew website).

Further, teens were 20% to 60% more likely to visit five energy drink websites compared with all websites (DrinkNOS.com, 5HourEnergy.com, RedBullUSA.com, MonsterEnergy.com, and AmpEnergy.com). Additional soda websites visited disproportionately more often by teens included Fanta.com, ICoke.com, DrPepper.com, GreenLabelSound.com (Mtn Dew), Sprite.com, and Jarritos.com (a Mexican soda brand). Two sports drink websites (Gatorade.com and Powerade.com) and VitaminWater.com completed the list.

Beverage website content

Table 30 describes the 20 websites with the most youth visitors in 2013. In addition to product information, these sites commonly featured entertainment, event sponsorships and other promotions, and content from social media, including YouTube videos and Facebook and Twitter feeds. A few sites also provided nutrition information and store locators.

The most-viewed energy drink websites featured content with special appeal to young males. Most were devoted to athletic events and endorsements, posting pictures of motorsports, mountain biking, surfing, skateboarding, and other adventurous activities. Links at the bottom of the pages also connected visitors to social media, including Facebook, Twitter, Google+, and YouTube. The most-visited site, 5HourEnergy.com, featured contests to win concert tickets and references to product

usage, such as “At college? At home? At work? Where do you take your 5-hour Energy shot most often?”

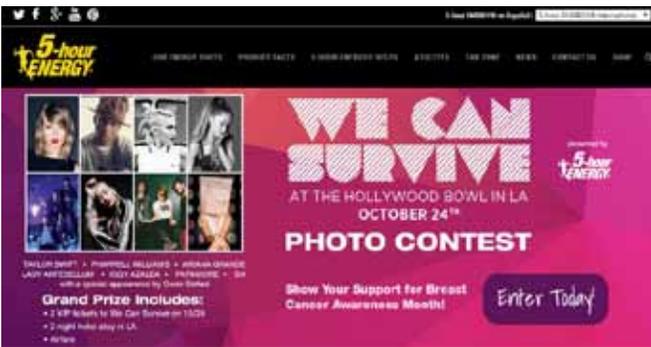
On the most popular Coca-Cola site, MyCokeRewards.com, consumers could enter codes from Coca-Cola products to accumulate virtual points and earn prizes. Nearly every link on the page connected visitors to ways to use their points, including “Sweepstakes,” “Instant Win,” “Spend Points on Promotions,” or “Support a Good Cause.” For example, visitors could redeem points for a “1-Month Club Pogo Subscription” and access “100+ games online.”

Dr Pepper, Pepsi, Gatorade, and Vitamin Water also provided opportunities for youth engagement on their websites. DrPepper.com encouraged visitors to design and order a personalized Dr Pepper t-shirt, featuring young people striking poses while wearing Dr Pepper apparel. Pepsi.com consisted of a mosaic of continuously rotating pictures. Each picture linked to promotional videos, articles, or specific Instagram posts. Most photos portrayed young people holding a Pepsi, with friends, in an exotic location, or making an amusing face. Gatorade.com engaged youth by highlighting its celebrity athlete endorsements. Consumers could also watch videos, enter contests, purchase Gatorade-sponsored Xbox games, and virtually “tour” professional locker rooms. These sites all included links to YouTube, Twitter, Facebook, and other social media pages. VitaminWater.com featured nutrition information as well as social media platforms. The site also included a section, “Hydrate the Hustle,” which invited visitors to view and share live performance videos.

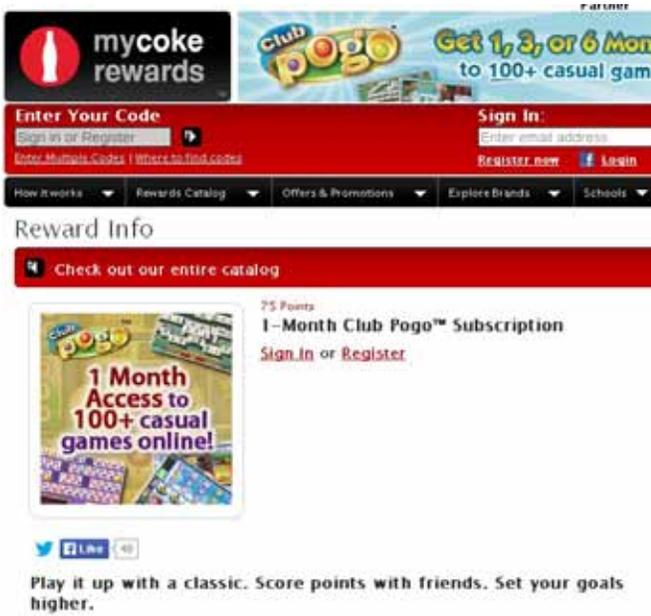
Table 30. Content of beverage company websites with the most youth visitors

Rank	Company	Website	Type	Content
1	Innovation Ventures	5HourEnergy.com	Lifestyle	Nutrition, online ordering, store locator, entertainment, social media
2	Coca-Cola	MyCokeRewards.com	Lifestyle	Promotion, advergaming, social media
3	Red Bull	RedBull.com	Events	Entertainment, social media
4	PepsiCo	Pepsi.com	Lifestyle	Promotion, online order, social media
5	Red Bull	RedBullUSA.com	Events	Social media
6	PepsiCo	Gatorade.com	Product	Nutrition, online ordering, store locator, social media
7	Dr. Pepper Snapple Group	DrPepper.com	Lifestyle	Promotion, entertainment, social media
8	Monster Beverage Corporation	MonsterEnergy.com	Events	Promotion, entertainment, social media
9	PepsiCo	PepsiCo.com	Company	Corporate information
10	Coca-Cola	Coca-ColaCompany.com	Company	Corporate information
11	Coca-Cola	Coca-ColaScholars.org	Lifestyle	Social media
12	Coca-Cola	VitaminWater.com	Product	Nutrition, social media
13	PepsiCo	MountainDew.com	Lifestyle	Promotion, social media
14	Rockstar	RockstarMayhemFest.com	Event	Social media
15	Coca-Cola	DrinkNOS.com	Product	Nutrition, store locator, social media
16	Coca-Cola	Coca-Cola.com	Company	Promotion, social media, link to other Coca-Cola sites
17	Ocean Spray	OceanSpray.com	Product	Nutrition, promotion, online order, store locator, social media
18	Dr. Pepper Snapple Group	Snapple.com	Product	Nutrition, promotion, social media
19	Coca-Cola	ICoke.com		Not available in 2014
20	Welch Foods Inc.	Welchs.com	Product	Nutrition, promotion, social media

Source: comScore Media Metrix Key Measures Report (January-December 2013)



Youth-oriented pages from 5HourEnergy.com, RedBull.com, and MonsterEnergy.com



Promotion on MyCokeRewards.com

Summary of beverage company websites

From 2010 to 2013, there was a notable decline in the number of youth visitors to approximately 60% of the websites evaluated both years, and four of the top-20 websites in 2010 were discontinued or did not have enough youth visitors to

report in 2013. In general, child visitors to websites declined at a greater rate than teen visitors. However, youth visitors to eight sites increased by 20% or more from 2010 to 2013, and five of the top-20 websites in 2013 were new or did not have enough visitors to measure in 2010. Websites with the greatest increase in youth visitors from 2010 to 2013 included 5HourEnergy.com (+113,000 child and teen visitors per month), RedBullUSA.com (+25,000 youth visitors), RedBull.com (+23,000 youth visitors), and Pepsi.com (+18,000 youth visitors). Although youth visitors to MyCokeRewards.com declined by 58% from 2010 to 2013, the site continued to attract the most child visitors (almost 13,000 per month in 2013). MyCokeRewards.com and Coca-ColaScholars.com also had the highest youth engagement, averaging seven minutes or more per visit.

Twenty of the 50 websites in this analysis attracted a disproportionately high number of teens compared with the internet overall, including six energy drink sites and six Coca-Cola Co. sites, and much of their content appeared to be aimed at a youth audience. TumYummies.com was the only website to offer content designed specifically for children. However, the most popular energy drink, soda, and other sugary drink websites featured extreme sports, popular entertainment, promotions, and other content (e.g., scholarships) with youth appeal. In addition, most websites featured social media content (e.g., Facebook and Twitter posts, YouTube videos) and links to brands' social media pages, including Facebook, Twitter, Google+, and YouTube.

Display advertising on third-party websites

Display advertising exposure	Definition
Third-party websites	Websites from other companies where sugary drink and energy drink brands place their advertising.
Display advertising	Comparable to "banner advertising" (reported in the 2010 analysis), these ads appear on third-party websites as rich media (SWF) files and traditional image-based ads (JPEG and GIF files). They are usually placed in a sidebar or "banner" at the top of a web page. On Facebook, these ads appear on the side of the screen, next to the newsfeed. Text, video, and html-based ads are not included.
Children's websites	Third-party websites with over 20% of visitors who are children (2-11/12 years)* (i.e., twice the percentage of all visitors to the internet who are children). Children's websites with over 1 million display ads for sugary drinks are included in the analysis.
Youth websites	Third-party websites defined by comScore as "Family & Youth" sites for teens, as well as websites with a percent of youth visitors (2-17 years) that exceeds the percent of youth visitors to the total internet during the same time period.
Unique visitors per month	Average number of unique visitors exposed to a brand's display advertisements each month.
Ads viewed per visitor per month	Average number of display advertisements viewed per unique visitor each month.
Total number of ads viewed on children's and youth websites	Total number of display advertisements viewed on each type of website (children's or youth) per year.
Average monthly ads viewed on children's and youth websites	Average number of display advertisements viewed on each type of website (children's or youth) per month.

*comScore changed its age breaks for children and teens in July 2013.

We obtained 2013 data from comScore to measure display ads on third-party websites placed by the companies in our analysis. **Ranking Table 8** presents average number of display ads placed monthly on youth websites by brand, noting the product(s) and/or promotional campaigns featured in the ads.

On average, 26.8 million sugary drink and energy drink ads appeared on youth websites per month in 2013. This number represents a decline of 72% for the brands that were also included in our 2010 analysis. On average, 5% of all sugary drink ads were placed on third-party youth sites in 2013, down from 11% of ads in 2010. Almost one-half (44%) of ads placed on youth websites (11.8 million per month) appeared on children's websites. An additional 152 million display ads for these brands appeared on YouTube and Facebook monthly in 2013.

Table 31 compares the average number of display ads per month on youth websites by drink category in 2010 versus 2013. Despite the overall decrease in display ads on youth websites, the number of energy drink ads did not change. In addition, the number of ads placed on youth websites increased substantially for children's drinks. Although the numbers were relatively small, fruit drink ads on youth websites increased more than 800%, the largest increase for any drink category. Conversely, ads for soda (including regular soda and brand-level ads), sports drinks, and flavored water declined 50% or more. The decrease in soda brand

Table 31. Monthly display ads on youth websites by category

Category	Average # of banner ads viewed per month on youth websites (000)		
	2010	2013	Change
Children's drinks	8,927.2	10,246.6	+15%
Soda brands*	50,683.6	6,408.5	-87%
Regular soda	23,011.2	4,679.2	-80%
Sports drinks	4,750.5	2,187.6	-54%
Energy drinks	1,790.6	1,811.8	+1%
Iced tea/coffee	0	1,088.9	
Fruit drinks**	31.6	290.0	+818%
Flavored water**	5,479.6	62.3	-99%
Total	94,674.2	26,774.9	-72%

*Includes only ads for soda brands that did not specify a regular or diet product

**Excludes children's drinks

Source: comScore Admetrix Advertiser report (January - December 2013)

ads was primarily due to a substantial reduction in ads for My Coke Rewards. In 2010, on average, 40 million ads for My Coke Rewards were placed on youth websites monthly (more than 75% of ads for soda brands), compared to just 23,000 per month in 2013.

In comparing companies (see **Ranking Table 8**), Kraft Foods and Coca-Cola advertised the most on third-party youth websites; both averaged over 9.5 million ads viewed per

month for all their sugary drink brands. In 2013, Kraft Foods increased its advertising on youth websites by 8% versus 2010 and placed 20% of its total display advertising on these sites. On the other hand, Coca-Cola advertising on youth websites went down by 85% from 2010 to 2013 and represented just 5% of its total display advertising on third-party websites. In addition, Novamex (Jarritos brand), Dr Pepper Snapple Group, and PepsiCo each placed 1.2 to 2.0 million display ads on youth websites in 2013, declines of 73% to 88% from 2010. Of the large beverage companies, PepsiCo placed the highest proportion of its ads on youth websites in 2013 (7%).

Display advertising by brand

Comparing individual brands, Capri Sun (including both Capri Sun Roarin' Waters and Capri Sun fruit drink) and Coca-Cola placed the most ads on youth websites in 2013, averaging 9.0 million and 6.4 million ads viewed per month, respectively (see **Ranking Table 8**). Two brands, Powerade and Jarritos soda, placed more than 1 million ads on youth websites per month, and four additional soda brands placed 800,000 ads or more per month (Dr Pepper, Crush, Pepsi NEXT, and Mtn Dew). This was a decrease from 2010, when nine brands or campaigns placed 1.5 million to 40 million display ads per month on third-party youth websites. Three of the top campaigns in 2010 did not advertise at all on youth websites in 2013 (Live Positively Coca-Cola, DEWmocracy, and Fanta Sabor Irresistible).

Another eight brands reduced display ads on youth websites by over 80% in 2013 versus 2010: Coca-Cola, Dr Pepper, Mtn Dew, Kool-Aid, Sprite, Gatorade, Vitamin Water, and AMP Energy. The proportion of total display ads appearing on youth websites also decreased for these brands. Although Coca-Cola remained one of the top sugary drink advertisers to young people online (#1 in 2010 and #2 in 2013), the brand's advertising on youth websites declined by 87%, from 50.7 million average monthly ads viewed in 2010 to 6.4



Powerade ads often appeared on youth websites

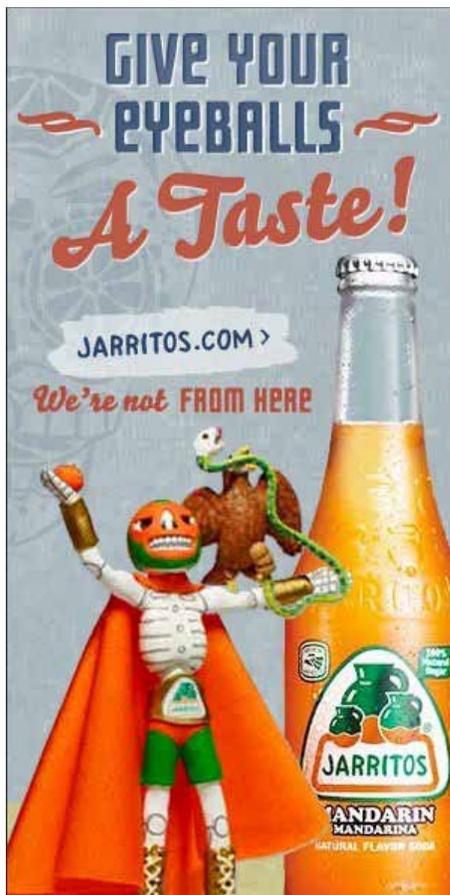
million in 2013. When excluding ads for My Coke Rewards, the proportion of total Coca-Cola ads on youth websites increased slightly from 3% in 2010 to 4% in 2013.

However, not all brands reduced their display advertising. Ads viewed on youth websites for Capri Sun products more than doubled from 2010 to 2013 (4.4 in 2010 to 9.0 million in 2013). On average, 9.4 million internet visitors saw 3.7 ads for Capri Sun per month in 2013. Yet the proportion of Capri Sun ads appearing on youth websites decreased from 47% to 23%. Red Bull ads viewed on youth websites more than tripled from 2010 to 2013 (to 863,000 in 2013), but just 1.5% of their total ads appeared on youth websites. Further, four brands advertised on youth websites in 2013 that had not advertised on these sites in 2010: Fuze, Hawaiian Punch, Snapple, and 7UP.

Of note, three brands increased their display ads on youth websites and increased the proportion of their ads placed on youth websites between 2010 and 2013. For Powerade, the number of ads on youth websites more than tripled to 2.1 million ads per month in 2013, and the proportion of ads on youth websites increased from 4% in 2010 to 12% in 2013. Similarly, the number of display ads for Crush soda on youth websites more than doubled, from 390,000 in 2010 to 847,000 in 2013, and the proportion of ads on youth websites increased from 23% to 27% (the fourth highest proportion in our analysis). Ocean Spray also increased average monthly ads displayed on youth websites by 345%, from 32,000 in 2010 to 141,000 in 2013, and the proportion of ads on youth websites increased from less than 1% to almost 5%. Additional brands with a high proportion of display ads placed on youth websites included Tum E Yummies (50%), Hawaiian Punch (45%), Jarritos (34%), and Tampico fruit drinks (11%).



Youth-oriented Red Bull banner ad



Jarritos ad with cartoon action figure

Display advertising targeted to children

Although just 2.4% of display ads for the brands in our analysis appeared on children's websites in 2013, on average 11.8 million ads viewed per month or 142 million ads per year, appeared on ten children's websites (see **Table 32**). Children between the ages of 2 and 11 or 12 make up approximately 10% of the total internet audience, but these sites averaged at least twice that rate during the quarters examined.

Table 33 presents the number of ads viewed on children's websites in 2013 by brand. Capri Sun ads appeared on children's sites more often than ads for any other sugary drink. Of note, Capri Sun was the only brand advertising on the internet approved by the CFBAI for advertising to children.⁴ Tum E Yummies also placed 50% of its ads on children's sites in 2013, and Hawaiian Punch (from Dr Pepper Snapple Group) placed about 170,000 ads on children's sites.

However, four of the seven brands with more than 1 million ads on children's websites in 2013 were not children's brands. Coca-Cola Co. placed 38 million display ads for products or promotions that were not approved for advertising to children on children's websites, including Coca-Cola, Powerade, NOS Energy, and Fuze iced tea. Of note, 4% of Powerade's display

Table 32. Children's websites with the most sugary drink display ads

Children's websites	Total sugary drink ads viewed in 2013 (000)	Proportion of total unique visitors	
		Youth (2-17 years)	Children (2-11/12 years)*
Nickelodeon Kids And Family	30,903.0	49%	32%
Roblox.COM	28,127.6	35%	21%
Disney Online	25,882.0	34%	22%
Cartoon Network Online	19,616.1	61%	46%
Spil Games	11,261.4	51%	33%
MiniClip.com	10,198.9	46%	29%
CoolMath-Games.com	9,959.3	49%	35%
Ganz sites	3,245.6	53%	37%
TotallyHer – Kids	1,918.9	46%	25%
Woozworld.com	1,018.2	57%	31%

* In July of 2013 comScore extended the children's age range to 2-12 years (versus 2-11 years prior).

Source: Source: comScore AdMetrix & Key Measures for children & youth exposure to websites (January - December 2013). comScore Key Measures for total audience exposure to youth sites (February 2013 - January 2014). comScore Key Measures for total audience exposure to youth sites and total audience exposure to social media sites (March 2013 - February 2014).

Table 33. Sugary drink display ads viewed on children's websites

Company	Brand	2013 yearly ads viewed on children's websites (000)	Proportion of ads viewed on children's websites
Kraft Foods	Capri Sun	84,912.3	18%
Coca-Cola	Coca-Cola	28,179.2	2%
Coca-Cola	Powerade	7,351.9	4%
Kraft Foods	Kool-Aid	6,434.4	6%
BYB Brands	Tum E Yummies	4,598.4	50%
PepsiCo	Pepsi NEXT	2,074.4	1%
Coca-Cola	NOS Energy Drink	1,177.0	1%
Ocean Spray	Ocean Spray	979.0	3%
Coca-Cola	Fuze	645.3	1%
Houchens Industries	Tampico	253.9	2%
Coca-Cola	My Coke Rewards	199.4	1%
Dr Pepper Snapple Group	Hawaiian Punch	169.4	3%
PepsiCo	AMP Energy	101.3	1%

Highlighting indicates children's product

Source: comScore Admetrix Advertiser report (January - December 2013)

ads appeared on children's websites (the highest percentage for any non-children's brand). PepsiCo also placed 2 million display ads for its Pepsi NEXT reduced-calorie soda on children's websites.



Child-directed display ads for Hawaiian Punch, Tum E Yummies, Kool-Aid, and Capri Sun

Display advertising targeted to youth

We also analyzed other third-party websites where display ads for sugary drinks and energy drinks commonly appeared. In 2013, almost 50 million display ads were placed on six additional youth websites (excluding children's sites) (see **Table 34**). However, in 2013 these ads appeared most often on Facebook and YouTube: almost 2 billion ads, or 31% of all ads in our analysis.

As noted earlier, several sugary drink brands placed a higher-than-average proportion of display ads on youth websites, including Jarritos (34%), Crush (27%), Powerade (12%), Starbucks (9%), and Fuze (8%), indicating that these brands likely targeted their marketing towards a youth audience. An additional 82.3 million sugary drink and energy drink ads appeared on YouTube per month, or 17% of all display ads in 2013, and 70 million sugary drink ads per month appeared on Facebook, or 14% of display ads in 2013. Although Facebook and YouTube were not classified as youth websites according to the proportion of youth visiting the sites, they are very popular with young visitors. Facebook averaged over 14 million monthly visitors ages 2-17, or approximately 10% of its audience in 2013.⁵ Monthly average youth visitors to YouTube was even greater, reaching 19 million, approximately 15% of its audience in 2013.

Table 34. Third-party youth and other websites with the most display ads in 2013

Third-party websites	Total sugary drink ads viewed in 2013 (000)	Youth (2-17 years) proportion of total unique visitors
YouTube.com	987,712	15%
Facebook.com	838,874	10%
Wikia Sites	16,629	20%
Fanpop.com	11,678	22%
DeviantART.com	8,024	23%
FanFiction.net	5,099	26%
Gamefront.com	4,558	21%
Twitch Interactive Inc.	3,235	21%

Source: comScore AdMetrix & Key Measures for youth exposure to websites (January - December 2013). comScore Key Measures for total audience exposure to youth sites (February 2013 - January 2014). comScore Key Measures for total audience exposure to youth sites and total audience exposure to social media sites (March 2013 - February 2014).

Table 35 shows display ads viewed for sugary drink products with more than 1 million average monthly ads viewed on either Facebook or YouTube. As found with youth websites, Coca-Cola and Capri Sun were also the most advertised brands on Facebook. However, both Gatorade and Sunkist

Table 35. Brands with the most display ads on Facebook and YouTube in 2013

Brand	Average monthly ads viewed (000)			Proportion of total ads viewed		
	Facebook	YouTube	Youth websites	Facebook	YouTube	Youth websites
Coca-Cola	25,557.6	5,476.1	6,409.0	18%	4%	4%
Capri Sun	9,426.2	555.7	8,968.1	24%	1%	23%
Dr Pepper	3,981.0	4,416.8	853.9	9%	10%	2%
Red Bull	3,653.8	9,767.5	863.0	9%	24%	2%
Gatorade	3,154.5	145.5	66.4	59%	3%	1%
Kool-Aid	2,957.1	39.7	657.0	32%	0%	7%
NOS energy drink	2,931.0	200.7	289.7	42%	3%	4%
Mtn Dew	2,541.2	4,491.6	800.3	14%	25%	4%
5-hour Energy	2,440.1	52,351.2	630.0	3%	73%	1%
Pepsi NEXT	2,185.1	1,218.6	819.6	10%	6%	4%
Sunkist	1,831.4	0.0	0.0	82%	0%	0%
Fuze	1,080.0	795.0	611.0	16%	12%	8%
Powerade	778.0	1,075.8	2,121.2	4%	6%	12%

Source: comScore Admetrix Advertiser report (January - December 2013).

soda advertised extensively on Facebook, but not on youth websites. More than one-quarter of display ads for Gatorade, NOS Energy, Kool-Aid, and Sunkist soda appeared on Facebook. In addition, five brands advertised more often on YouTube than on any other website. On average, more than 52 million ads for 5-hour Energy appeared on this one website alone (73% of the brand's display ads), followed by Mtn Dew (4.5 million, 25% of display ads), and Dr Pepper (4.4 million, 10% of display ads). Powerade and Red Bull also advertised more often on YouTube than on Facebook or youth websites.

Summary of display advertising on third-party websites

From 2010 to 2013, the number of sugary drink and energy drink display ads viewed on third-party youth websites declined by 72% (94.7 million per month in 2010 vs. 26.8 million in 2013). Ads for regular soda and soda brands, sports drinks, and flavored water declined more than 50%, and My Coke Rewards eliminated virtually all ads on youth websites (compared with 40 million ads per month in 2010). The proportion of ads placed on youth websites also declined from 11% in 2010 to 5% in 2013. Despite this overall decline, children's brands such as Capri Sun, Hawaiian Punch, and

Tum E Yummies increased ad placements on youth websites by 15%, with 18% of ads for Capri Sun and 50% of Tum E Yummies ads appearing on children's websites. Further, CFBAI companies placed more than 46 million ads for sugary drinks that were not approved for advertising to children on children's websites in 2013, including Coca-Cola, Powerade, Pepsi NEXT, and NOS energy drink. Other brands placing a high proportion of their ads on websites visited relatively more often by youth under 18 included Hawaiian Punch (45%), Jarritos (34%), Crush (27%), and Powerade (12%).

In addition, advertising on social media sites YouTube and Facebook appears to have replaced much of the advertising on youth websites, representing 31% of all display ads for the sugary drink and energy drink brands in our analysis. Although young people visit these websites at similar rates as adults, they are among the most popular sites for youth. 5-hour Energy, Coca-Cola, and Capri Sun placed the most ads on these sites (55 million, 31 million, and 10 million, respectively). Gatorade and Sunkist also had a particularly strong presence on Facebook, with over 50% of their monthly ad views on this one site, and 5-hour Energy placed 73% of its display ads on YouTube.

Social media marketing

Social media marketing Definition

Facebook	Brands maintain Facebook pages where they post information about their promotions and products, share links to other sites, and upload photos and videos. A typical brand Facebook page contains multiple tabs with a variety of content (e.g. notes, messages, polls, photos, videos, applications).
Facebook likes	Facebook users can “like” a brand and incorporate it into their network of friends (formerly called “fans”). Thumbnail photos of these individuals appear on the brand’s Facebook page in the “people who like this” section. When the brand posts new content, a notification may appear on the “newsfeed” (i.e., Facebook home page) of individuals who like the brand. The brand also shows up on these individuals’ Facebook pages as something that they “like.”
Facebook post	A message that a brand posts to its Facebook “timeline.” These messages typically incorporate images, videos, polls, links to other pages within Facebook, and links to other websites. Posts also may appear on the “newsfeed” of individuals who like the brand for their friends to see. Individuals may also share brand posts, and they will appear on their friends’ newsfeeds.
Twitter	Brands maintain Twitter accounts where they publish 140-character messages called “tweets” that are posted on their own profile pages. Individuals can “follow” brands. “Followers” receive copies of brands’ tweets on their own Twitter home pages. Followers may also receive tweets on their mobile devices, through text messages, third-party Twitter applications, or Twitter’s own mobile platform.
YouTube	YouTube enables brands to upload and share videos for the public to view. Brands maintain their own YouTube channels with playlists of videos available for viewing. Any internet user can watch the videos, but users can also “subscribe” to a channel and receive alerts whenever the brand posts a new video. YouTube reports the number of views of uploaded videos. ⁶ Since 2011, YouTube changed the way it calculates views, including removing views of deleted videos and creating a mechanism to prevent hacking that artificially increases video view counts. ⁷
Instagram	Instagram is an online mobile social networking service that enables brands to share pictures and videos and invite users to post their own brand content. From the “home” tab, Instagram users can view photos from brands they follow in a format similar to Facebook’s newsfeed, where they can also “like” and comment on photos.
Vine	Vine is a mobile application that enables brands to record and share an unlimited number of short, looping video clips with a maximum length of six seconds. From the “home” tab, Vine users can view videos from brands they follow in a format similar to that of Instagram’s newsfeed. On their newsfeeds, brands can share any video on Facebook or Twitter or embed videos on their websites.
Hashtag	The hashtag (#) symbol is used to mark keywords or topics on social media platforms, including Twitter, Facebook, Instagram, and Vine. Users place a # before a relevant keyword or phrase in their posts to categorize posts and help identify these posts more easily in a search. Clicking on a hashtagged phrase in any message shows the viewer all other messages (including pictures and videos) marked with that keyword or phrase.

In 2014, virtually all brands in this report had a presence on some form of social media. For our analyses we examined Facebook, Twitter, and YouTube accounts that actively engaged with users through posts, tweets, or video uploads from January 2013 through June 2014 and had 10,000 or more likes, followers, or views. We included account pages that were dedicated to a specific sugary drink or energy drink brand, as well as accounts that featured these drinks on pages with drinks in other categories (e.g. Minute Maid featured both fruit drinks and 100% fruit juice on its social media pages). These brand pages that did not exclusively promote a sugary drink or energy drink are categorized as “sugary drink brand.” We also included social media pages from brands in our analysis that featured promotional activities (e.g., Red Bull X-Fighters, Mtn Dew Green Label) and/or the company (e.g., Coca-Cola Company).

A total of 31 companies sponsored 80 Facebook pages, 68 Twitter accounts, and 44 YouTube channels that met these criteria. These social media pages totaled 307 million Facebook likes, 11 million Twitter followers, and 1.8 billion views on YouTube, including brand, promotional, and company pages.

We also evaluate changes in popularity of social media accounts by brand and company from July 2011 to June 2014. In addition, we analyze the amount and content of activity on Twitter accounts from January through June 2014, as well as the average number of views per video on YouTube as of October 2014. Brands’ marketing activity on popular new social media platforms, Instagram and Vine, is also discussed.

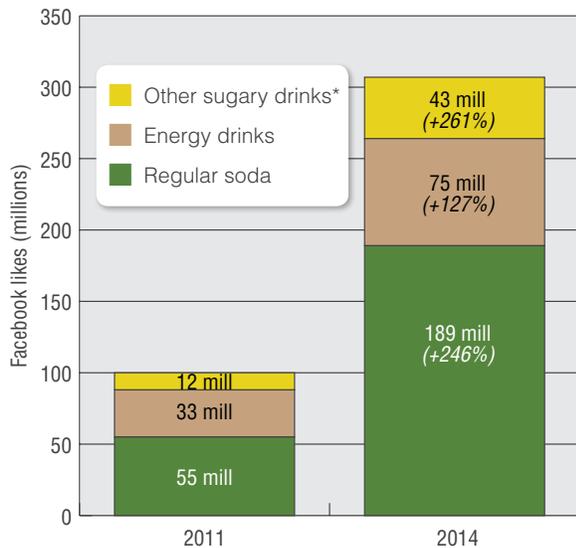
By June 2014, the social media presence for sugary drinks and energy drinks increased dramatically, with 69 brands having a

total of 192 accounts (including brand, promotional and company pages) on Facebook, Twitter, and YouTube. **Ranking Table 9** includes all pages with 100,000 or more likes on Facebook or followers on Twitter in 2014 and active YouTube accounts.

Facebook

In 2014, we identified 80 Facebook pages totaling over 300 million likes. Of these total Facebook likes, over 60% were for soda brands and 24% were for energy drinks (see **Figure 14**). The remaining categories of flavored water, fruit drinks, iced tea/coffee, and sports drinks, as well as brand pages (not exclusively promoting sugary drinks or energy drinks) and company-level accounts made up the balance (approximately 14%). From 2011 to 2014, the number of Facebook likes for all drink categories at least doubled, while likes for soda brands more than tripled from 55 million fans in 2011 to 189 million likes in 2014.

Figure 14. Facebook likes by category in 2011 and 2014

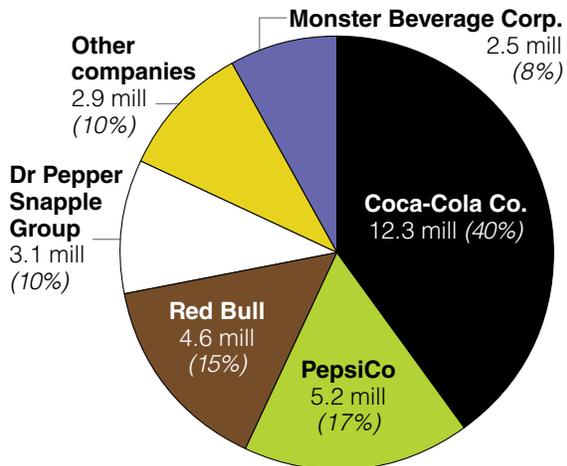


*Includes followers of brand- and company-level pages
Source: Rudd Center analysis of Facebook followers (June, 2014)

Coca-Cola Co. dominated likes on Facebook. The company's Facebook pages totaled over 123 million likes and made up 40% of all likes in this analysis. Four additional companies made up another 50% of likes on Facebook in 2014: PepsiCo, Red Bull, Dr Pepper Snapple Group, and Monster Beverage Corporation (see **Figure 15**). From 2011 to 2014, the number of Facebook likes for these five companies' brands more than doubled. PepsiCo's likes increased almost four-fold, the highest growth for any company in our analysis. Unilever (Lipton brands) ranked number six with 7.1 million Facebook likes in 2014, eight times the number of likes in 2011. Four additional companies completed the top-ten list of Facebook likes (Nestle, Kraft Foods, Arizona, and Rockstar), with 2.7 to 4.8 million Facebook likes each.

Differences by brand. As in 2011, regular soda and energy drink brands filled the top-ten brand rankings for Facebook

Figure 15. Facebook likes by company in 2014



Source: Rudd Center analysis of Facebook followers (June, 2014)

likes in 2014, with one sports drink (Gatorade) ranking ninth and one iced tea (Lipton) tenth. The top-ten brands in 2011 remained in the top-ten for 2014 with two exceptions: Vitamin Water fell to thirteenth in 2014 and Fanta entered the top-ten in seventh place. There were some other notable shifts. In 2014, Coca-Cola regular soda replaced Red Bull as the most popular drink brand on Facebook with more than 80 million likes. Red Bull dropped to second place with over 46 million likes. In addition, Pepsi replaced Monster Energy in the number-three slot with 32 million likes. Sprite, Dr Pepper, and Fanta totaled 14 to 16.8 million likes each, while Mtn Dew, Gatorade, and Lipton had 5 to 8.7 million likes.

The popularity of most Facebook accounts grew dramatically from 2011 to 2014. Among the top-20, Dr Pepper, Mtn Dew, Vitamin Water, Arizona, and Brisk had a relatively modest growth of just 50% to 66%. However, many brands more than doubled their likes in 2014 versus 2011. Notable increases included Pepsi, Snapple, 7UP, Tropicana, and Fuze (7- to 8-fold increases), while Sunkist and Sierra Mist increased by more than 30 times. Of the brands examined in 2011, only AMP Energy decreased in number of likes (-87%). In addition to Fanta (noted above), Lipton, Nestea, Sun Drop, and Jarritos were new to the top-20 brands in 2014 with 2.5 to 5.8 million likes.

Several child- and teen-targeted brands identified in the TV and internet exposure analyses also appeared among the top-20 Facebook brands. For example, Sun Drop soda totaled 3.5 million Facebook likes, ranking number 14; Kool-Aid ranked eighteenth with 3.1 million likes; and Jarritos soda ranked number 19 with 2.5 million likes.

Examples of popular promotional pages on Facebook included the My Coke Rewards page, which offered ways for users to enter the codes on Coca-Cola products and redeem them for rewards and other prizes, and the Coca-Cola Freestyle page, which helped users locate "Freestyle" machines, announced

events, and asked for users' comments. Red Bull, Rockstar, and Mtn Dew had promotional pages for their music and arts events (Red Bull Music Academy, Rockstar Mayhem Festival, Rockstar Uproar Festival, and Mtn Dew Green Label). Red Bull also maintained pages that focused on extreme sports and provided links to its videos displaying adrenaline-producing feats performed at Red Bull sponsored events or by Red Bull sponsored athletes (Red Bull X-Fighters, Red Bull Air Race, and Red Bull Flugtag). Red Bull X-Fighters was the most popular promotional page in our analysis with over 1.9 million followers, followed by My Coke Rewards, Rockstar Mayhem Festival, Red Bull Air Race, Red Bull Music Academy, and Coca-Cola Freestyle with 200,000 to 400,000 followers. Of note, we excluded non-U.S. pages that some brands also added since 2011.

Engagement devices in Facebook posts. As in 2011, Facebook pages continued to encourage users to engage with the brands in diverse and creative ways. The most salient change from 2011 was Facebook's new "timeline" layout. This format provided a more dynamic and visually appealing page well-suited for advertising. With the timeline layout, brands regularly posted videos, promotions, and news updates for users to like, comment, and share. This feature also facilitated integration with other social media sites (e.g., links to Instagram, YouTube, Twitter, and Vine). In addition, some brands' Facebook pages provided links to mobile game apps for users to download. Users did not have to seek out a brand's page to interact with content. If a user liked a brand, brand content might also appear in the user's own timeline.

In 2014, Facebook posts were highly engaging, with many posts linking to brands' Twitter sites and hashtags related to specific campaigns. For example, Coca-Cola's Facebook posts included



Dr Pepper Facebook post directing users to enter a tuition giveaway



Pepsi Facebook posts with music celebrities popular with teens

#ShareACoke and Sprite's included #SpriteFilmsChallenge. Some Facebook pages also had embedded videos with links to brands' YouTube pages or a brand website URL. For example, Coca-Cola released a video in March asking consumers to create



Coca-Cola Facebook post inviting users to create their own TV commercial



Kool-Aid Facebook posts targeting youth and parents

their own Coke TV commercial. Competitions, sweepstakes, and giveaways were other ways brands engaged with followers, directing them to a brand website or asking them to "like" a page to enter the contest. For example, Dr Pepper promoted a tuition giveaway, directing users to its website to enter the contest. Links to celebrities were another way that brands engaged with users, such as Pepsi's posts featuring celebrity endorsements, concert ticket contests, links to behind-the-scenes videos, and interviews with musicians and celebrities popular with teens, including Usher and Ariana Grande.

Although Facebook's terms of agreement do not allow children under 13 to maintain accounts, younger children often visit the site. In 2012, at least 7.5 million Facebook users were under the age of 13.⁸ One Kool-Aid post on Facebook appeared to appeal directly to tweens, linking them to the Kool-Aid Instagram page and offering to "like them back." Children's brands with Facebook pages also focused their posts and content on parents. For example, Minute Maid had a Dadvice campaign, and Kool-Aid promoted their pouches as a way for parents to help their kids "make friends this year."

Twitter

We identified over 60 different Twitter profiles for sugary drinks and energy drinks from 26 companies in our analyses. There was also tremendous growth in Twitter followers over the past three years, reaching almost 11 million in 2014, up from

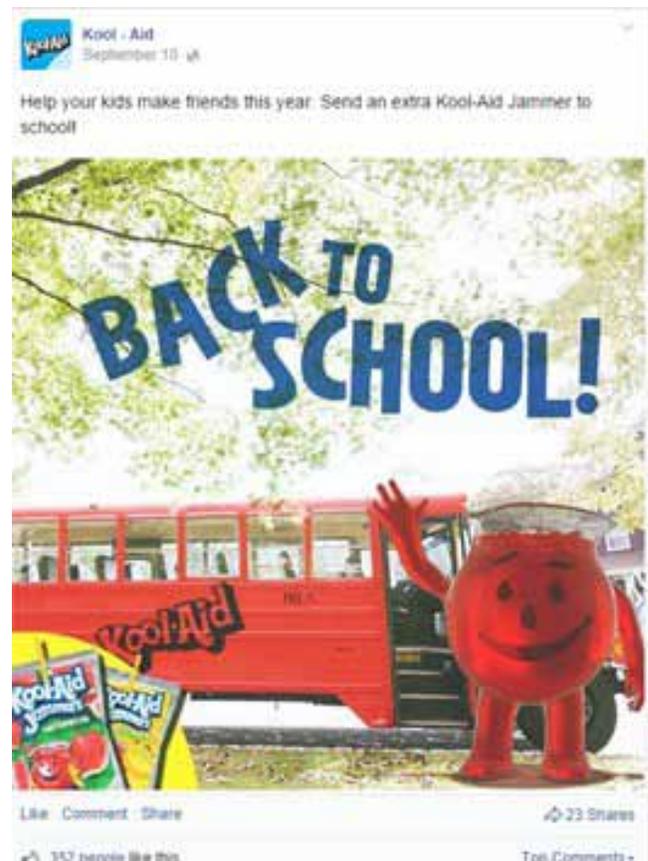
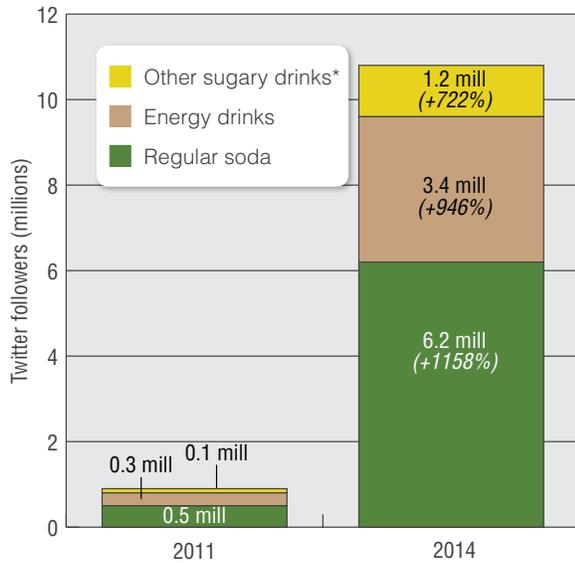


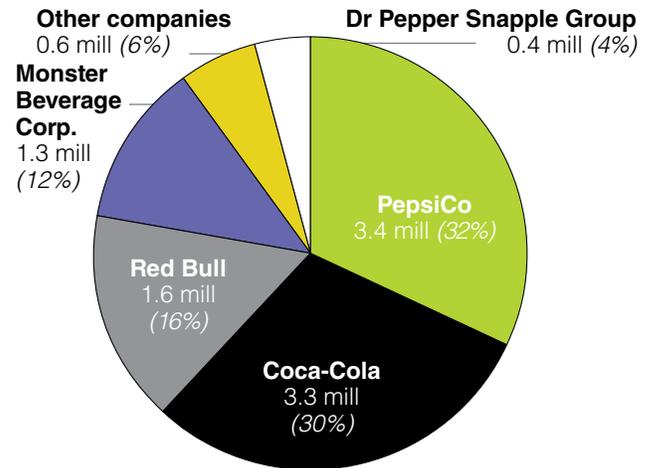
Figure 16. Twitter followers by category in 2011 and 2014

*Includes followers of brand- and company-level pages
Source: Rudd Center analysis of Twitter followers (June, 2014)

less than 1 million in 2011. As with Facebook, regular soda brands dominated with over 6 million Twitter followers in 2014 (57% of followers). Energy drink followers made up another 3.4 million (29%), while the balance (1.2 million) consisted of accounts for various brands, companies, and other sugary drink categories (see **Figure 16**).

In contrast to Facebook, fewer companies in our analysis appeared to focus on social media marketing in Twitter. Coca-Cola Co. and PepsiCo dominated in this medium, with nearly 7 million followers combined, representing 62% of Twitter followers for the brands in our analysis (see **Figure 17**). Red Bull and Monster Energy Corporation made up another 3 million followers (28% of the total). Just one additional company had more than 400,000 Twitter followers in 2014: Dr Pepper Snapple Group. The remaining 21 companies with Twitter accounts contributed just 6% of followers in our analysis. While all companies at least doubled their followers from 2011 to 2014, PepsiCo showed the largest increase (19-fold). Monster Energy and Rockstar followers also increased by approximately 17 times.

Differences by brand. Four individual Twitter accounts dominated in 2014: @Pepsi had the most followers with approximately 2.6 million, closely followed by @CocaCola with just over 2.5 million. @RedBull and @MonsterEnergy had 1.5 and 1.3 million followers, respectively. Most of these top brands added new Twitter promotional pages since 2011 that boosted their total followers. Rockstar ranked considerably lower in followers on Twitter (total of 329,000), but also added new accounts that focused on its music sponsorships (Rockstar Mayhem and Uproar Festivals). Of note, most of these additional Twitter pages (for example @mycokerewards and @redbullairrace) utilized the same names as the brands' new promotional Facebook pages, enabling followers of one page to locate these promotional pages across platforms.

Figure 17. Twitter followers by company in 2014

Source: Rudd Center analysis of Twitter followers (June, 2014)

Of the Twitter brand pages with over 1 million followers in 2014, @Pepsi increased 29-fold, @MonsterEnergy grew 17-fold, and @CocaCola and @RedBull showed increases of seven to eight times. Of the brands with 200,000 to 400,000 Twitter followers, Mtn Dew, Dr Pepper, Gatorade, and Rockstar had 6- to 13-fold increases. The 20 most-followed Twitter pages in 2014 also included three new promotional pages: @RBMA (Red Bull Music Academy) with over 88,000 followers, and @mycokerewards and @MayhemFest (Rockstar) with over 60,000 followers, as well as one company page: @COCACOLACO (224,000 followers).

Twitter engagement. We examined the most recent 3,200 tweets over five months (Jan. 1 to June 18, 2014) and calculated average tweets per day. **Table 36** presents measures of engagement for the ten Twitter accounts with the most followers in 2014. Three of the top-ten individual pages were also the most active. @CocaCola, @redbull, and @mtn_dew each averaged 20 to 60 tweets per day. However, pages with the most Twitter followers were not necessarily the most active. For example, two of the most popular accounts, @pepsi and @MonsterEnergy, averaged just 4.1 and 4.6 tweets per day, respectively. In contrast, eight of the most active Twitter accounts (averaging 10+ tweets per day) had fewer than 100,000 followers, including @bolthousefarms, @sunnydelight, @RBMA (Red Bull Music Academy), @honesttea, @jonessodaco, @Snapple, @Vitacoco, and @mycokerewards.

Some sugary drink and energy drink brands appeared to focus their activity on direct interactions with Twitter followers by consistently replying to users who tweeted them about their products. For @CocaCola and @mtn_dew, 99% and 93% of tweets were direct replies to users. However, there was considerable variation in using replies as an engagement technique. For other accounts, replies ranged from 7% of tweets by @MonsterEnergy to 89% of @Gatorade tweets.

Retweeting is another indicator of engagement and highly desirable as it exponentially increases the reach of a

Table 36. Measures of engagement for the top-ten Twitter accounts

Company	Brand	Category	Handle	Average # of tweets per day	Followers	Total tweets analyzed*	Proportion of tweets		
							Replies to other users	Retweeted by other users	Favorited by other users
PepsiCo	Pepsi	Regular soda	@pepsi	4.1	2,588,202	681	33%	81%	80%
Coca-Cola	Coca-Cola	Regular soda	@CocaCola	60.4	2,517,586	3,200	99%	45%	36%
Red Bull	Red Bull	Energy drink	@redbull	45.7	1,538,597	3,200	69%	66%	74%
Monster Beverage Corporation	Monster Energy	Energy drink	@monsterenergy	4.6	1,315,717	775	7%	67%	68%
PepsiCo	Pepsi	Regular soda	@mtn_dew	19.9	360,434	3,200	93%	46%	64%
Dr Pepper Snapple Group	Dr Pepper	Regular soda	@drpepper	11.3	267,022	1,897	76%	57%	75%
PepsiCo	Gatorade	Sports drink	@Gatorade	13.6	260,600	2,281	89%	53%	65%
Rockstar	Rockstar	Energy drink	@rockstarenergy	7.8	235,851	1,311	50%	62%	74%
Coca-Cola	Coca-Cola Company	Company	@COCACOLACO	8.6	224,034	1,436	36%	70%	76%
Coca-Cola	Powerade	Sports drink	@POWERADE	1.1	133,915	179	17%	84%	85%

Source: Twitonomy⁹ (*Jan-June, 2014)

company's Twitter activity. Twitter users can also mark tweets as "favorites." A user's favorites can be viewed by other users, and favoriting a tweet indicates that users find the tweet of interest or value. Our analysis also showed variation between accounts in rates of retweets and favorites, but most top-ten Twitter accounts frequently retweeted and had a high percent of their tweets favorited by others. @POWERADE had a high level of engagement with 85% of its tweets favorited and 84% retweeted. @Pepsi also had high engagement, with 80% of tweets favorited and 81% retweeted. @CocaCola had the lowest rates of favorited and retweeted tweets (36% and 45%, respectively), though this lower number likely reflects the high proportion of @CocaCola tweets that were replies. Although not a top-ten Twitter account, Rockstar's @MayhemFest had the highest engagement rate of all Twitter accounts analyzed, with a 93% retweet rate and 94% favorited. To increase engagement, brands also asked followers directly to retweet. For example, Dr Pepper referenced football in a tweet with "RT if you're hoping for a one of kind season." Vita Coco Kids asked users to retweet to win coupons, prizes, and samples.

The most popular tweets for the four top Twitter accounts in our analysis involved events, sports, and popular social media celebrities. For example, @Pepsi's most popular tweet, with over 30,000 favorites and 23,600 retweets, was a retweet of Bruno Mars' Superbowl tweet: "GAME TIME!" For @CocaCola, a tweet picturing the 2014 World Cup Happiness Flag received more than 7,200 favorites and 8,700 retweets. @RedBull's most popular tweet was a retweet of computer game professional Nadeshot's announcement that he made the finals of the Major League Gaming tournament, where Red Bull followed him behind the scenes. This retweet received over 8,800 favorites and 5,200 retweets. Monster's most popular tweet was a mid-air picture of BMX rider Pat Casey, which received over 3,800 favorites and 6,800 retweets.

YouTube

Thirty-nine of the sugary drink and energy drink brands in our analysis maintained 44 different YouTube channels. Energy drink brands dominated on YouTube with over 1 billion video views (59% of the total). Soda accounted for 645 million views (36%), while various other sugary drinks made up the balance. Among the brands in this analysis, Red Bull dominated with over 840 million views as of June 2014, followed by Coca-Cola (340 million views), Pepsi (196 million views), 5-hour Energy (129 million views), and Monster Energy (82 million views). All other YouTube channels had fewer than 50 million views.

Due to a change in YouTube's methods for counting views, we were unable to directly compare number of views in 2011 versus 2014. However, there were some notable changes in YouTube channel rankings. Sprite and Fanta did not have a presence in the 2011 analysis, but these brands ranked sixth and seventh in number of views, respectively, in 2014. One iced tea brand, Lipton, also made the top-ten most viewed sugary drink and energy drink YouTube channels in 2014. In addition, Mtn Dew, Red Bull, and Rockstar added promotional YouTube channels for their music and arts sponsorships that were not found in 2011. Three of these channels ranked among the top-20 for video views: Mtn Dew Green Label (14 million views), Red Bull Music Academy (7 million views), and Rockstar Mayhem Festival (4 million views).

Table 37 presents average views per YouTube video for the ten most-viewed sugary drink and energy drink channels in 2014. On just these ten channels, there were 11,000 different videos available totaling nearly 2 billion views. However, number of available videos and average views per video varied widely. For example, Red Bull had over 4,000 videos available averaging 215,000 views each. In contrast, 5-hour Energy had just 94 videos available, but the highest average views per video at over

Table 37. Ten most-viewed YouTube channels in 2014

Main channel	# of videos available*	Average views per video	Total views (mill)*
Red Bull	4,215	215,157	906,885
Coca-Cola	3,385	122,671	415,240
Pepsi	924	230,171	212,678
5-hour Energy	94	1,430,898	134,504
Monster Energy	782	112,021	87,601
Sprite	701	73,192	51,308
Fanta	503	91,208	45,878
Lipton (Brisk)	54	455,738	24,610
Mtn Dew	215	102,257	21,985
Lipton	53	351,930	18,652

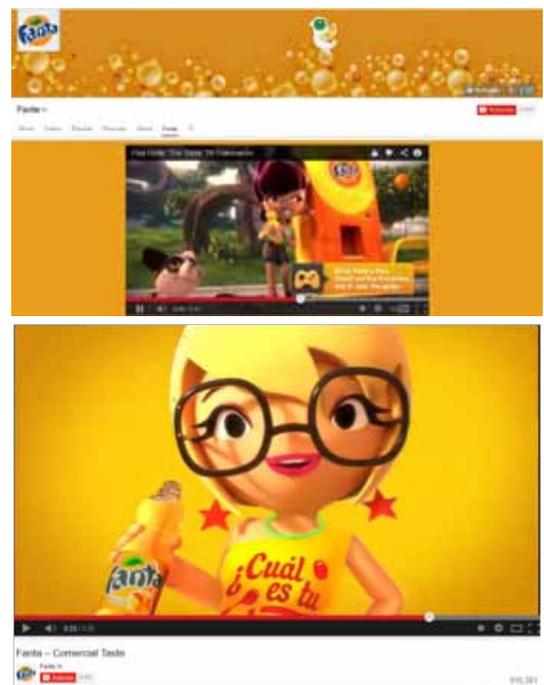
*Data collected October, 2014.
Source: Social Baker (2014)¹⁰

1.4 million each. One 5-hour Energy video had the most views for a single video. This video showed how the energy drink helps increase focus – depicting a cross-section of people engaged in a variety of activities, such as playing chess, giving a speech, rock climbing, and playing football – and was viewed over 46 million times. Lipton (Brisk) with just 54 videos, averaged over 455,000 views per video. Most of the brand's videos uploaded in 2014 showed episodes of Brisk's Bodega chats. These English-language videos took place in Latino neighborhoods and celebrated Latino artists, music, and culture.

YouTube video content. Energy drink companies' YouTube videos often depicted extreme sporting events and athletes. For example, Monster Energy videos featured Adam Kun, a BMX flatland world champion. Red Bull's videos also focused on risky sporting events. One of its most famous videos (over 35 million views) showed Red Bull-sponsored Felix



Pepsi's humorous YouTube video of "tween dynamo" Charlyze interviewing NFL player Asa Watson



Fanta YouTube videos, including Spanish-language versions, with child-targeted features



YouTube video of Muppets showing that Lipton iced tea makes a meal less boring than one with water



YouTube video of LeBron James selecting his favorite Sprite flavor



Red Bull YouTube videos of sponsored sporting events

Baumgartner's parachute descent from 128,100 feet to set a new world record. 5-hour Energy videos featured sponsored athletes, such as a world-famous Italian water skier and racecar driver Clint Bowyer. The brand also utilized humor in many videos, including a "Yummification" contest asking users to enter videos with recipes to mix 5-hour Energy with other drinks to make it more palatable. The winning videos were available to viewers.

Videos on other sugary drink YouTube channels also featured content that appealed to families and youth. Coca-Cola's channel had many videos in different languages, often depicting happy families. Pepsi videos showcased its NFL sponsorship, with a series of videos utilizing "tween dynamos" Charliize and Max interviewing NFL rookies. Fanta's opening YouTube page featured a cartoon video with child-like characters and included Spanish-language videos (one received over 900,000 views). Lipton also had videos appealing to children with the Muppets making their boring meal served with water more exciting with iced tea. Celebrity endorsements were also popular, including LeBron James for Sprite, Kristen Bell for Lipton, and Eminem for Brisk. Monster Energy, Pepsi, and Sprite YouTube channels also offered music playlists with behind-the-scenes interviews and music videos.

Newer social media platforms

Sugary drink and energy drink brands have also become active marketers on newer social media platforms, including Instagram and Vine. Although marketing on these platforms is more difficult to track and analyze systematically, they

provide a substantial opportunity for brands to expand the reach of their marketing to younger audiences. These newer social media platforms are popular among teens, with 30% of teens reporting Instagram as their preferred social network in 2014.¹¹

Instagram. Companies use Instagram for marketing by soliciting users' photos and videos for contests or posting them to promote sponsorships, new products, and other promotions. Companies can "regram," which is posting others' content that reflects well on the brand. Regrams acknowledge the source of the original Instagram post by crediting the source's Instagram handle.

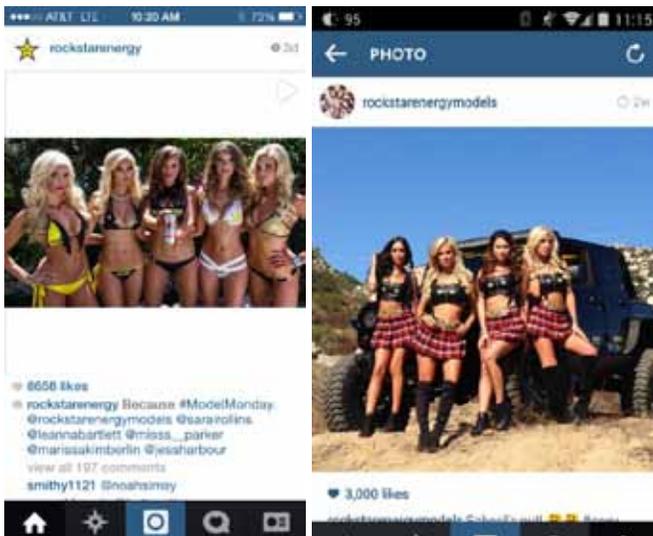
There were 53 Instagram pages for the brands in our analysis, but just six brand pages had more than 100,000 followers (see **Table 38**). Three energy drinks had the most Instagram followers: Red Bull dominated with 1.4 million followers, Monster Energy had over 900,000, and Rockstar followed with over 230,000. Gatorade ranked a close fourth with 225,000 Instagram followers. Coca-Cola and Arizona came in fifth and sixth with over 100,000 thousand followers. Rockstar Energy Drink Models, Mtn Dew, Red Bull X-Fighters, and Peace Tea each had 36,400 to 64,000 followers.

Energy drink brands often integrated their Instagram content with their content on Facebook, YouTube, and Twitter, showing daring youth-oriented extreme sports videos and pictures. Rockstar also included many posts of sporting activities, as well as posts of Rockstar models in bikinis. Of note, when a user "follows" an Instagram account a list of additional suggested accounts for the user to follow is often presented. Rockstar suggested another Rockstar Instagram account: RockstarEnergyModels. Dedicated to the models who promote the brand, this account had over 74,000 followers (ranking seventh).

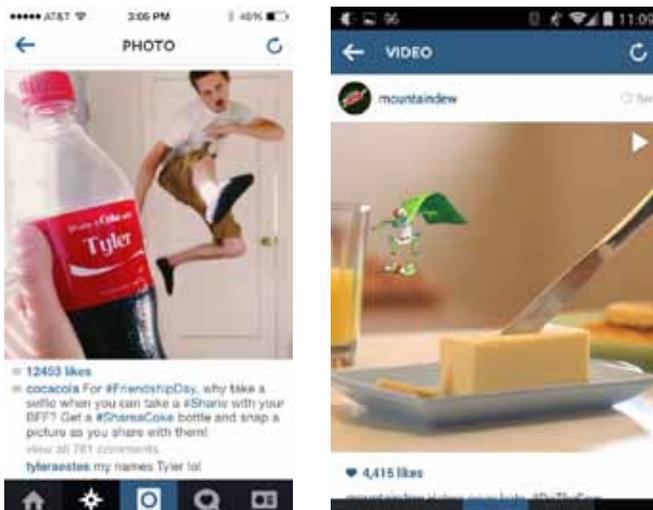
Table 38. Followers for the top-ten Instagram accounts

Rank	Company	Brand	Category	Instagram followers
1	Red Bull	Red Bull	Energy drink	1,408,701
2	Monster Beverage Corporation	Monster Energy	Energy drink	906,992
3	Rockstar	Rockstar	Energy drink	232,022
4	PepsiCo	Gatorade	Sports drink	225,323
5	Coca-Cola	Coca-Cola	Regular soda	168,659
6	Arizona	Arizona	Other sugary drink brand	128,228
7	Rockstar	Rockstar Energy Drink Models	Energy drink	74,483
8	PepsiCo	Mtn Dew	Regular soda	64,094
9	Red Bull	Red Bull X-Fighters	Promotion	46,389
10	Monster Beverage Corporation	Peace Tea	Iced tea/coffee	36,411

Source: Rudd Center analysis of Instagram (June, 2014)



Instagram posts of Rockstar models



Instagram post for Coke #ShareACoke campaign

Instagram post for Mtn Dew with animated superhero at a breakfast table

Some brands used celebrity sports figures in their Instagram posts. For example, Derek Jeter appeared in a Gatorade post and Shaquille O'Neal in an Arizona post (promoting the new Arizona 'Shaq' cream soda line with his face on every 23.5 ounce can). The #ShareACoke campaign featured prominently in Coca-Cola's posts. One post with over 12,000 likes asked users to take a photo when presenting a #ShareACoke bottle to a friend. Mtn Dew posts promoted its skateboarding Dew Tour and included short videos of an animated character being launched from a toaster or posing on a breakfast table. Pepsi's Instagram posts focused on music sponsorships and ticket giveaways. Both Arizona and Dr Pepper suggested Taco Bell, and Coca-Cola suggested McDonald's and Starbucks, as additional Instagram accounts to follow.

Vine. Similar to Instagram, companies use Vine for marketing by soliciting users' videos for contests or posting videos

Table 39. Followers for the top-ten Vine accounts

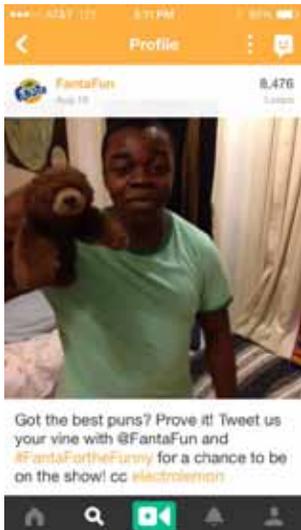
Rank	Company	Brand	Category	Vine followers
1	PepsiCo	Pepsi	Regular soda	93,857
2	Red Bull	Red Bull	Energy drink	88,459
3	Coca-Cola	Coca-Cola	Regular soda	65,250
4	PepsiCo	Mtn Dew	Regular soda	26,780
5	Coca-Cola	Coca-Cola Freestyle	Promotion	23,533
6	Rockstar	Rockstar	Energy drink	10,142
7	Dr Pepper Snapple Group	Dr Pepper	Regular soda	8,386
8	Coca-Cola	Vitamin Water	Flavored water	6,886
9	Red Bull	Red Bull Music Academy	Sponsorship	4,355
10	Coca-Cola	Fanta	Regular soda	4,137

Source: Rudd Center analysis of Vine accounts (October, 2014)

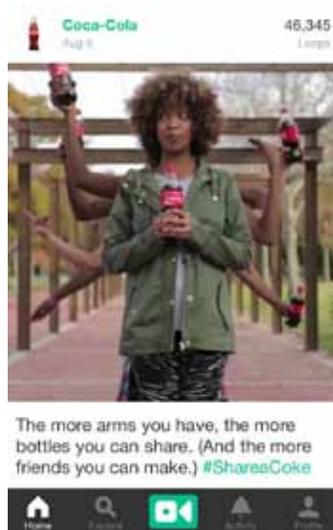
to promote their sponsorships, new products, and other promotions. Companies can also "revine," which is posting others' content that reflects well on the brand. As with regrams, revines acknowledge the source of the original Vine post by crediting the source's Vine handle.

This newest social media platform in our analysis had more limited usage by sugary drink and energy drink brands, with just 21 brands active on Vine. However, three of those brands also had additional promotional accounts: Coca-Cola Freestyle, Red Bull Music Academy, and Red Bull X-Fighters. Of the top-ten most followed Vine accounts in our analysis, nine were for soda and energy drink brands (see **Table 39**). Pepsi had over 93,000 followers, and Red Bull followed closely at over 88,000. Coca-Cola ranked third with over 65,000, and Mtn Dew and Coca-Cola Freestyle each had over 23,000. Rockstar, Dr Pepper, Vitamin Water, Red Bull Music Academy, and Fanta all had 10,000 or fewer followers.

The content of brands' 6-second looping videos on Vine was similar to content on other social media accounts, and much of it appeared targeted to a youth audience. Pepsi promoted both Pepsi and Pizza Hut with humorous videos. Coca-Cola's posts continued its #ShareACoke campaign appearing in other social media. Mtn Dew's Vine posts with its animated character were similar to the brand's short videos on Instagram. Of note, Fanta's Vine posts focused on teen engagement. In August 2014, the brand partnered with a team of young, popular multicultural digital influencers to co-create an all-Vine comedy show for teens. A Fanta executive explained, "'Fanta For The Funny' unites teens around their shared desire for fame and their shared passion for humor, while allowing them to be themselves and to connect their way."¹² Fanta Vine posts asked users to, "Tweet us your vine with @FantaFun and #FantaForTheFunny for a chance to be on the show."



#FantaForTheFunny series
Vine posts



Vine post of youth for
#ShareACoke campaign

Summary of social media marketing

In 2014, energy drinks and regular soda brands dominated social media marketing. Regular soda and energy drink brands represented 84% of the 300 million Facebook likes for brands in our analysis, 89% of 11 million Twitter followers, and 95% of 1.8 billion YouTube views. As in 2011, Red Bull, and Coca-Cola were the leaders in social media marketing

in 2014. Pepsi also ranked among the top-three brands on Facebook, Twitter, and YouTube in 2014 due to an increase of 600% on Facebook, a 30-fold increase on Twitter, and 196 million video views on YouTube. Two additional energy drink brands – Monster Energy and Rockstar – ranked among the most active brands on all social media platforms, and 5-hour Energy ranked fourth in YouTube video views at 129 million. Coca-Cola, Red Bull, and Pepsi also were the top-three sugary drink brands on Instagram, and Coca-Cola and Red Bull ranked in the top-five sugary drink brands on Vine.

Overall, the popularity of energy drinks and regular soda brands on social media increased exponentially since 2011. Total Facebook followers tripled for regular soda and doubled for energy drinks, and Twitter followers increased by over 90% for both categories. Individual brands increased their presence on social media in different ways. They added 53 new Instagram accounts and 21 active Vine accounts since 2011. Coca-Cola, Red Bull, Mtn Dew, and Rockstar also expanded by creating new social media accounts for sponsored music, sports, and arts activities, and established new accounts for these promotions on Facebook, Twitter, and YouTube, and even Vine and Instagram.

Another trend across many brands was the use of celebrities in social media. Pepsi, Sprite, Gatorade, Lipton, Arizona, and Brisk utilized well-known music and sports celebrities, while Fanta and Red Bull used young digital-media celebrities. Brands also engaged users to virally increase their social



Red Bull racing games with cartoon graphics and in-app purchases

media reach, with retweets, regrams, and revines, as well as teen-targeted contests inviting users to post videos and photos on various platforms. Both Coca-Cola and 5-hour Energy conducted contests encouraging users to create video commercials for their products. Brands tended to use consistent messaging across platforms, with similar content on their Facebook, Twitter, Instagram, and Vine posts. In addition, links within posts commonly directed users to other social media platforms or the brand's website, introducing users to new platforms as they become popular.

Smartphone applications

We identified 39 smartphone applications (apps) available for US-based iPhone users offered by nine of the companies in our analysis. Smartphone applications are computer programs designed to run on a smartphone or other mobile device. These apps promoted 14 different sugary drink brands (see **Table 40**). The majority of apps were for gaming ($n=16$) or entertainment ($n=7$) purposes. One-third ($n=13$) had child-targeted elements, such as cartoon-style graphics, child characters, or simple game play appropriate for children. However, many more of these mobile applications were likely aimed at teens, featuring games with more realistic graphics. As noted in our previous report, as much as 41% of users of similarly realistic apps from Red Bull were 12

to 17 years of age.¹³ Most of the apps ($n=36$) were free to download, although eight featured in-app purchases. Red Bull Racers and Red Bull Kart Fighter 3 both had child-targeted elements and in-app purchases of up to \$39.99 and \$29.99, respectively. Users were also encouraged to earn coins in Kart Fighter by viewing ads, primarily for other apps that have further expensive in-app purchases.

As in 2010, Red Bull had the most mobile applications with 15. Seven of these were highly engaging and immersive games based around topics with youth appeal, including breakdancing, extreme sports, and freestyle soccer. PepsiCo and Coca-Cola Co. offered eight and seven apps, respectively, with the largest category again being games. Coca-Cola was notable for its promotion of Fanta through child-targeted advergaming applications, including Fanta Fruit Slam, in which the player throws fruit at young cartoon characters. These characters were also integrated into another app styled on graphic novels, in which the young protagonists must save the world from becoming “playless gray” zombies; vitality and color is restored to the “playless” through play, music, and Fanta. PepsiCo's Mtn Dew picked up on the extreme sports trend with the game Baja or Bust, which featured cartoon “big-headed” motocross riders racing across stereotypically Mexican landscapes to promote Mtn Dew's Baja Blast flavor. Unilever's Lipton brand also sponsored an apparently child-targeted advergaming with cartoon ice-cube characters.



Fanta Save the Source mobile app

Table 40 Smartphone applications for sugary drink and energy drink brands

Company	Brand	Application name	Application type	Price	In-app purchases	Child-targeted features	Description
Coca-Cola	Coca-Cola	(THRED)	Games	Free	Yes		Game with proceeds to AIDS (one in-app purchase of \$209.99) Pilot an orb through sci-fi surroundings
Coca-Cola	Coca-Cola	Coca-Cola Freestyle	Food and drink	Free			Find nearest location for Coke Freestyle machines, integrated with Facebook
Coca-Cola	Fanta	Fanta Fruit Slam 2 - Food fight game	Games	Free		Youthful cartoon characters throwing fruit around	Dodgeball with fruit
Coca-Cola	Fanta	Fanta Fun Tap	Games	Free		Simplistic gameplay, young cartoon characters	Tap the Fanta bottles to win the game
Coca-Cola	Coca-Cola	MCR	Lifestyle	Free			My Coke Rewards, exclusive rewards and deals with the app
Coca-Cola	Fanta	Play Fanta: Saving the Source	Books	Free		Youthful characters, anime style, references to play and fun	Graphic novel
Coca-Cola	Coca-Cola	World of Coca-Cola Explorer	Travel	Free			Accompaniment to visiting the World of Coca-Cola, Atlanta
Dr Pepper Snapple Group	Snapple	Spiny Lobsters in Snaplantis	Games	Free		Underwater cartoon characters and lobsters, stylistically like Spongebob Squarepants	Coordinate a lobster conga line, based on classic 'snake' game
Kraft	Capri Sun	Capri-Sun Tattoo	Entertainment	Free		Kids Choice Awards, multicolored cat mascot	Augmented reality app, scan Capri Sun to win Kids' Choice Awards content
Kraft	Kool-Aid	Kool-Aid	Entertainment	Free		Kool-Aid Man	Have the Kool-Aid Man photo-bomb your pictures and share them
Monster Beverage Corporation	Monster Energy	Energy Monster Supercross	Entertainment	Free			Event notifications and results for the supercross
Monster Beverage Corporation	Monster Energy	Ricky Carmichael's Motocross Matchup Pro	Games	\$0.99	Yes		Motocross racing game. In-app purchases up to \$49.99, highly developed graphics and many game options for riders, tracks, and race modes
Novamex	Jarritos	Club Jarritos	Food and drink	Free			Register and redeem Jarritos codes
PepsiCo	Mtn Dew	Baja or Bust	Games	Free		Cartoon 'big-head' motocross riders	Dirt bike racing game, exchange points for prize draws
PepsiCo	Gatorade	Gatorade: Break a Sweat Record	Games	Free			Set goals to beat personal records
PepsiCo	Mtn Dew	Mdew Scan	Entertainment	Free			Scan special X-Men Mtn Dew cans to unlock content for the latest X-Men movie
PepsiCo	Pepsi	Pepsi Goal	Games	Free			Play a city-wide penalty shootout match
PepsiCo	Pepsi	Pepsi Gulf Coast Jam	Entertainment	Free			Pepsi Gulf Coast Jam, country music festival
PepsiCo	Pepsi	Pepsi International Soccer Cup	Sports	\$1.99		App for youth soccer participants	Official app for parents, coaches, and teams in Pepsi International Youth Soccer
PepsiCo	Pepsi	Pepsi MTV Indies	Music	Free			Discover Indian indie music
PepsiCo	Sierra Mist	Sierra Mist Must Haves	Entertainment	Free		Cartoon games	Holiday-themed games

continued

Table 40 Smartphone applications for sugary drink and energy drink brands (cont'd)

Company	Brand	Application name	Application type	Price	In-app purchases	Child-targeted features	Description
Red Bull	Red Bull	RBMA Radio	Music	Free			Stream exclusive interviews, mixes, and live recordings
Red Bull	Red Bull	Red Bull Focus	Games	Free			Audiovisual game
Red Bull	Red Bull	Red Bull Illume 2010	Photo and video	Free			Action and adventure sports images
Red Bull	Red Bull	Red Bull Illume 2013	Photo and video	Free			Action and adventure sports images
Red Bull	Red Bull	Red Bull Kart Fighter 3 - Unbeaten Tracks	Games	Free	Yes	Cartoon characters and Go Kart racing	Kart racing game, in-app purchases up to \$29.99
Red Bull	Red Bull	Red Bull Kart Fighter World Tour	Games	Free		Go-kart racing cartoon game play	Race kart game
Red Bull	Red Bull	Red Bull Racers	Games	Free	Yes	Slot car racing game	Racing game with advanced graphics and multiple game modes, in-app purchases up to \$39.99
Red Bull	Red Bull	Red Bull Signature Series	Sports	Free			Companion to the extreme sports TV series
Red Bull	Red Bull	Red Bull TV	Entertainment	Free			Red Bull curated content featuring "action, adventure and excitement" for the iPad
Red Bull	Red Bull	Red Bull Urban Futbol	Games	Free	Yes		Street football game with advanced graphics and urban themes
Red Bull	Red Bull	Red Bull X-Fighters 2012	Games	\$0.99	Yes		Dirt bike game with advanced graphics and multiple game modes
Red Bull	Red Bull	Red Bull X-Fighters 2012 Free	Games	Free	Yes		Dirt bike game with advanced graphics and multiple game modes
Red Bull	Red Bull	RedBull.com	News	Free			Connects users with stories, images, news, and behind-the-scenes content
Red Bull	Red Bull	The Red Bulletin - ePaper	Lifestyle	Free			Monthly updates on sports, travel, art, and music
Red Bull	Red Bull	The Red Bulletin US	Lifestyle	Free	Yes		Global magazine
Rockstar	Rockstar	Official Rockstar Energy Drink Mayhem Festival	Music	Free			Updates and info on hard rock/heavy metal music festival
Rockstar	Rockstar	Rockstar Energy King of Wake	Sports	Free			Behind-the-scenes of pro wakeboarding series
Unilever	Lipton	COOL CUBES	Games	Free		Cartoon ice-cube character	Guide an ice cube through different tracks

Source: Rudd Center analysis of iPhone apps (July, 2014)



Capri Sun augmented reality tattoo app

Kraft Foods offered mobile apps for its children's products, including an augmented reality child-targeted app for Capri Sun in which children were encouraged to wear temporary Capri Sun tattoos that could be scanned to produce effects on their phones related to the 2014 Kids' Choice Awards. This tattoo app also featured videos of popular Nickelodeon stars, such as Daniella Monet of Victorious. The company also offered a Kool-Aid app that allowed users to have the Kool-Aid

man photo-bomb their pictures.

Two additional energy drink companies (Monster Energy and Rockstar) also offered two apps each. Dr Pepper Snapple Group offered just one app promoting its Snapple brand, which appeared to be child-targeted, featuring a game with animated underwater sea characters. In addition, a Club Jarritos app provided rewards and discounts to users.

Digital marketing

Signs of progress

- From 2010 to 2013, youth visitors to approximately 60% of the websites evaluated both years declined by 20% or more, and four of the top-20 websites in 2010 were discontinued or did not have enough youth visitors to report in 2013. In general, child visitors declined at a greater rate than teens.
- Total number of display ads for sugary drinks and energy drinks placed on third-party youth websites declined by 72%, from 94.7 million ads per month in 2010 to 26.8 million in 2013. Ads for regular soda and soda brands, sports drinks, and flavored water declined by over 50%. My Coke Rewards eliminated virtually all ads on youth websites (compared with 40 million ads per month in 2010). In 2013, 5% of sugary drink display ads were placed on youth websites, down from 11% in 2010.

Continued reasons for concern

- From 2010 to 2013, youth visitors to eight websites evaluated both years increased by 20% or more, and five of the top-20 websites in 2013 were new or did not have enough visitors to measure in 2010. Three energy drink websites had the highest growth in youth visitors – monthly unique visitors under age 18 increased by 113,000 for 5HourEnergy.com, 25,000 for RedBullUSA.com, and 23,000 for RedBull.com. Monthly youth visitors to Pepsi.com increased by 18,000.
- Although youth visitors to MyCokeRewards.com declined, the site continued to attract more children than any other site in our analysis (almost 13,000 per month). MyCokeRewards.com and Coca-ColaScholars.com also had the highest youth engagement, averaging seven minutes or more per visit.
- Twenty of the 50 websites analyzed attracted a disproportionately high number of teens compared with all internet sites, including six energy drink sites and six sites from Coca-Cola Co. Teens were more than three times as likely to visit Coca-ColaScholars.org and almost three times as likely to visit CrushSoda.com compared with other internet sites.
- Although TumEYummies.com was the only website to offer content designed specifically for children, most of the popular energy drink, soda, and other sugary drink websites featured content with high youth appeal, as well as links to the brands' social media content.
- The number of ads for children's drinks on youth websites increased by 15% from 2010 to 2013. Capri Sun placed more than 7 million ads on children's websites, such as Roblox.com and other Nickelodeon and Disney sites, more than double the number of 2010 ads. Tum E Yummies also placed 50% of its ads on children's sites.
- CFBAI companies placed more than 46 million ads for sugary drinks that are not approved for advertising to children on children's websites in 2013, including Coca-Cola, Powerade, Pepsi NEXT, and NOS energy drink.
- Other brands placing a high proportion of their ads on websites visited disproportionately more often by youth under 18 included Hawaiian Punch (45%), Jarritos (34%), Crush (27%), and Powerade (11%). Further, the number of energy drink display ads appearing on youth websites did not change from 2010 to 2013.
- Almost one-third of display ads for sugary drink and energy drink brands in our analysis appeared on Facebook and YouTube in 2013; advertising on these social media sites appeared to substantially replace much of the advertising on youth websites. 5-hour Energy, Coca-Cola, and Capri Sun placed the most ads on these sites (55 million, 31 million, and 10 million, respectively), while Gatorade and Sunkist placed more than 50% of all their display ads on Facebook, and 5-hour Energy placed 73% of its ads on YouTube.
- Social media marketing grew exponentially from 2011 to 2014: Facebook likes tripled to over 300 million, Twitter followers increased 11 times to 11 million, and over 40 YouTube channels had 1.8 billion video views. Regular soda and energy drink brands represented 84% of these Facebook likes, 86% of Twitter followers, and 95% of YouTube views.

- As in 2011, Red Bull and Coca-Cola were the leaders in social media marketing. Pepsi also ranked in the top-three brands on Facebook, Twitter, and YouTube in 2014 due to an increase of 600% on Facebook, a 30-fold increase on Twitter, and 196 million video views on YouTube. Two additional energy drink brands – Monster Energy and Rockstar – ranked among the most active brands on all social media platforms, and 5-hour Energy ranked fourth in YouTube video views at 129 million.
- Sugary drinks were early adopters of new social media platforms. Red Bull, Monster Energy, Rockstar, and Gatorade had over 200,000 Instagram followers, while Pepsi, Red Bull, Coca-Cola, and Mtn Dew had more than 25,000 followers on Vine.
- Promotions with high youth appeal were common across all social media platforms. For example, Coca-Cola, Red Bull, Mtn Dew, and Rockstar maintained separate accounts for their sponsored music, sports, and arts activities on all social media platforms (including Instagram and Vine). The use of celebrities popular with youth was also common, as well as teen-targeted contests and frequent reposting of followers' tweets, grams, and vines, to increase engagement
- Kraft Foods offered mobile advergaming apps for its Capri Sun and Kool-Aid children's products. Other sugary drink brands offering mobile apps with child-friendly graphics and games included Fanta, Snapple, Mtn Dew, Lipton, and Sierra Mist. Red Bull offered 15 different mobile apps, including youth-oriented games.

Marketing to Hispanic and black youth

This section documents Hispanic and black youth exposure to sugary drink advertising and compares it to exposure for other youth. We first examine Hispanic-targeted advertising on Spanish-language TV and then examine exposure to TV advertising for

black children and teens and their white peers. We also examine website exposure for black and Hispanic youth compared with all youth. Finally, we discuss sugary drink marketing to multicultural youth through local events and sponsorships.

Advertising on Spanish-language TV

TV advertising to Hispanic youth

Definition

Spanish-language TV TV programming presented on Spanish cable and broadcast networks (e.g., Univision, Telemundo). GRPs for Spanish-language TV advertising are calculated based on the number of Hispanic persons in Nielsen's viewer panel.

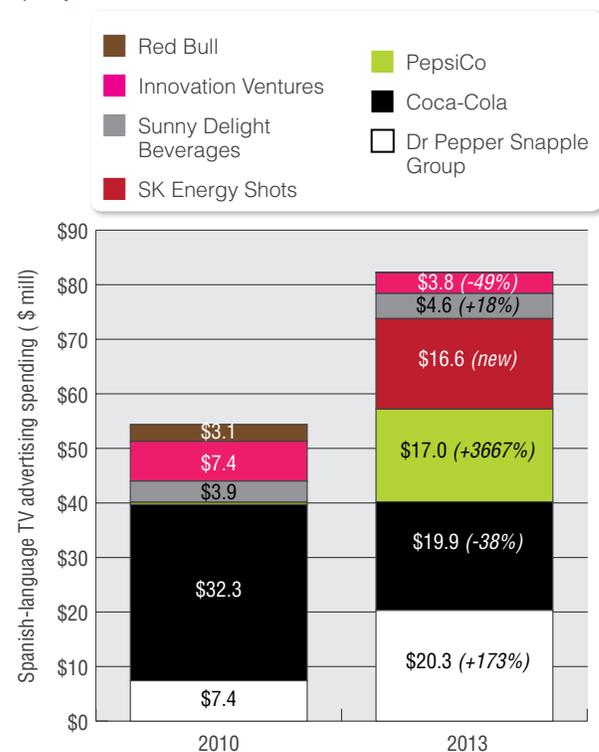
Seven companies advertised sugary drinks and energy shots on Spanish-language TV in 2013 (see **Figure 18**). Spanish-language advertising for these products totaled \$82 million, on average 14% of companies' TV advertising budgets. The three largest beverage companies (Coca-Cola Co., Dr Pepper Snapple Group, and PepsiCo) were responsible for 70% of Spanish-language advertising spending, followed by SK Energy Shots (a company that did not advertise in 2010). These four companies each spent \$16 to \$20 million to advertise their products to Hispanic audiences. Sunny Delight Beverages and Innovation Ventures (5-hour Energy) each spent approximately \$4 to \$5 million each.

Compared with 2010, spending on Spanish-language TV advertising for sugary drinks and energy shots increased 44%. Two of the large beverage companies substantially increased their Spanish-language advertising: PepsiCo had advertised minimally on Spanish-language TV in 2010 but spent \$17 million in 2013, and Dr Pepper Snapple Group almost tripled its Spanish-language advertising, overtaking Coca-Cola Co. as the beverage company with the most spending in this medium. Sunny Delight also increased its Spanish-language advertising by 18%. In contrast, Coca-Cola reduced its spending by 38%. Innovation Ventures also substantially reduced spending, while Kraft Foods and Red Bull eliminated virtually all Spanish-language advertising.

In contrast, Spanish-language TV advertising for diet drinks and 100% juice totaled just \$9.1 million dollars in 2013, approximately 10% of all beverage advertising on Spanish-language TV. PepsiCo spent the most to advertise these other drink categories on Spanish-language TV, including \$2.4 million to promote Tropicana juices and \$1.2 million for Diet Pepsi. Campbell Soup Company also spent \$2.4 million to promote V8 Fusion 100% juice on Spanish-language TV.

Differences by brand. **Table 41** presents total advertising spending on Spanish-language TV for individual brands. In 2013, SK Energy led in advertising for a single brand at \$16.6 million, closely followed by Pepsi and Coca-Cola regular sodas. Of note, Coca-Cola regular soda spending went down 30% versus 2010. In contrast, neither SK Energy nor Pepsi advertised on Spanish-language TV in 2010. Two Dr Pepper

Figure 18. Advertising spending on Spanish-language TV by company



Source: Rudd Center analysis of Nielsen data (2014)

Snapple Group regular soda brands (7UP and Dr Pepper) ranked fourth and fifth in Spanish-language advertising and both substantially increased advertising versus 2010. Sunny D was the only children's drink that advertised on Spanish-language TV in 2013, whereas Kraft Foods also advertised Kool-Aid in Spanish in 2010. Both 5-hour Energy and Powerade spent \$3 to \$4 million in Spanish-language advertising in 2013, declines of almost 50% versus 2010. Coca-Cola also advertised its Fanta brand on Spanish TV in 2010, but not in 2013.

Most of the brands that advertised on Spanish-language TV in 2013 also advertised extensively on English TV, but there were some notable exceptions. Three brands dedicated

Table 41. Advertising spending on Spanish-language TV by brand

Company	Brand	Category	Spanish-language TV advertising			% of total TV advertising spending in 2013
			2010 (\$000)	2013 (\$000)	Change	
SK Energy Shots	SK Energy	Energy shot	\$0	\$16,570	new	97%
PepsiCo	Pepsi	Regular soda	\$0	\$16,462	new	13%
Coca-Cola	Coca-Cola	Regular soda	\$22,664	\$15,793	-30%	19%
Dr Pepper Snapple Group	7UP	Regular soda	\$6,691	\$10,705	60%	100%
Dr Pepper Snapple Group	Dr Pepper	Regular soda	\$752	\$9,625	1181%	19%
Sunny Delight Beverages	Sunny D	Fruit drink	\$3,929	\$4,643	18%	34%
Innovation Ventures	5-Hour Energy	Energy shot	\$7,327	\$3,836	-48%	4%
Coca-Cola	Powerade	Sports drink	\$6,030	\$3,244	-46%	19%
Coca-Cola	Fuze	Iced tea	\$0	\$900	new	100%
PepsiCo	Mtn Dew	Regular soda	\$0	\$539	new	2%
Coca-Cola	Vitamin Water	Flavored water	\$0	\$240	new	2%
Red Bull	Red Bull	Energy drink	\$3,063	\$84	-97%	0%

Highlighting indicates children's product
 Source: Nielsen 2010-2013 ad spending analysis

virtually all their TV advertising budgets to Spanish-language programming: SK Energy, 7UP, and Fuze iced tea. In addition, Sunny D spent one-third of its TV budget on Spanish-language TV. Spanish-language TV also accounted for a relatively high proportion of Dr Pepper Snapple Group's total TV budget for all sugary drink brands in 2013 (36%), compared to 16% for Coca-Cola Co. and 7% for PepsiCo.

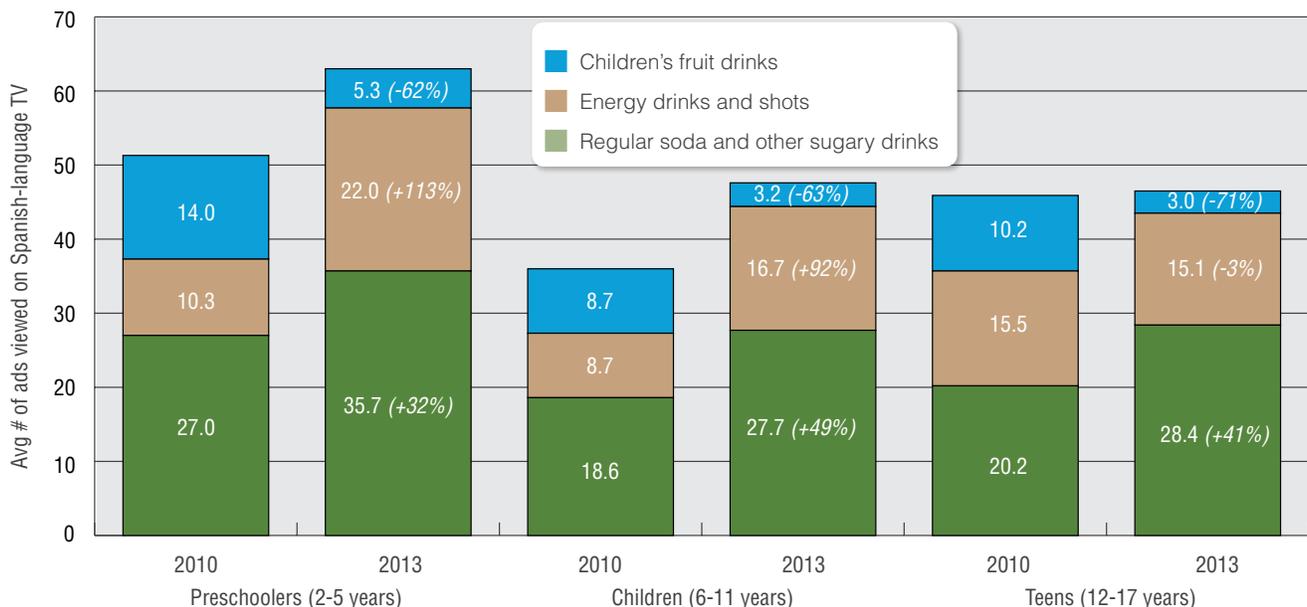
Hispanic youth exposure to Spanish-language TV advertising

From 2010 to 2013, exposure to TV ads for sugary drinks and energy shots on Spanish-language TV increased by 23% and

32% for Hispanic preschoolers and children, respectively. Consistent with 2010 results, Hispanic preschoolers saw one-third more of these ads (63.0 ads on average) compared with Hispanic children (47.6 ads). However, Hispanic teens' exposure did not increase from 2010 to 2013. As a result, in 2013 Hispanic children viewed slightly more Spanish-language TV ads than did Hispanic teens (46.5 ads). In contrast, teens saw 27% more ads than children saw in 2010.

The composition of TV ads viewed by youth on Spanish-language TV also changed from 2010 to 2013 (see **Figure 19**). For all age groups, ads viewed for children's drinks declined by more than 60%, while exposure to regular soda and other sugary drinks increased by 32% to 49%. Of note, Hispanic

Figure 19. Ads viewed on Spanish-language TV by category and age



Source: Rudd Center analysis of Nielsen data (2014)



Spanish-language TV ad depicting Spanish actress Claudia Molina. Translation: "A better source of energy"

preschoolers and children saw approximately twice as many ads for energy drinks and shots in 2013 versus 2010, while teens' exposure declined slightly by 3%. Hispanic preschoolers also saw more ads for energy drinks and regular soda on Spanish-language TV compared with both Hispanic children and teens.

Ranking Table 10 presents ads viewed by Hispanic youth on Spanish-language TV in 2013 for individual brands, including changes versus 2010. SK Energy was responsible for

approximately one-quarter of ads for unhealthy drinks viewed on Spanish-language TV by Hispanic youth of all ages. This finding contrasts with 2010 when more than one-third of ads viewed by Hispanic youth promoted Coca-Cola Co. brands (primarily Coca-Cola regular soda). In 2013, Pepsi and Dr Pepper regular sodas also surpassed Coca-Cola in advertising to Hispanic youth. 5-hour Energy and Sunny D ranked fifth and sixth in ads viewed by Hispanic children and teens, but this order was reversed for preschoolers who saw more ads for Sunny D than for 5-hour Energy. Of note, Kraft Foods' Kool-Aid ranked third in advertising to Hispanic youth in 2010, but was not advertised on Spanish-language TV in 2013.



Spanish-language Pepsi TV ad featuring Latino pop DJ trio 3BallMTY



Spanish-language Dr Pepper TV ad featuring Pitbull and highlighting the brand's 23 flavors

Exposure to TV advertising by black youth

TV advertising to black youth

Definition

Targeted ratio: Black to white children	GRPs for black children (2-11 years) divided by GRPs for white children (2-11 years). Provides a measure of relative exposure to TV advertising for black versus white children.
Targeted ratio: Black to white teens	GRPs for black teens (12-17 years) divided by GRPs for white teens (12-17 years). Provides a measure of relative exposure to TV advertising for black versus white teens.

In 2013, black children saw on average 271 TV ads for sugary drinks and energy drinks, and black teens saw 486 ads. Black youth in both age groups viewed more than twice the number of ads viewed by white children and teens (127 and 235 ads, respectively). As with all youth, black youth saw fewer of these ads in 2013 than in 2010. Exposure for black children declined 32%, and black teens saw 27% fewer ads. However, there were

slightly greater declines for white children and teens, who saw 42% and 33% fewer ads in 2013 than in 2010. Therefore, the disparity in exposure between black and white youth increased.

Differences between ads viewed by black and white youth can be explained partially by differences in amount of TV viewing. On average, black children watch 42% more TV compared with white children, while black teens watch 68%

Table 42. Black youth exposure to TV advertising by drink category in 2013

Category	Black children (2-11 years)		Black teens (12-17 years)	
	Average # of ads viewed	Black:white targeted ratio	Average # of ads viewed	Black:white targeted ratio
Flavored water	44.3	1.7	43.3	2.3
Energy drinks	79.6	2.6	180.3	2.2
Iced tea	15.2	2.3	25.5	2.1
Regular soda	72.6	2.1	143.3	2.0
Fruit drinks	30.0	1.8	35.7	1.9
Sports drinks	29.3	2.1	57.6	1.9
Total unhealthy drinks	271.0	2.1	485.6	2.1
Other diet drinks	2.3	2.0	3.4	1.8
Plain water	6.4	1.5	5.8	1.7
Diet soda	46.2	1.8	85.3	1.6
100% juice	77.0	1.6	90.7	1.5
Light juice	10.7	1.5	14.5	1.3
Total other drink categories	142.8	1.7	199.7	1.6

Bold numbers indicate a high black:white targeted ratio
Source: Rudd Center analysis of Nielsen data (2014)

more TV than white teens.¹⁴ Given the viewing habits of black children and teens, brands with a targeted ratio of 1.9 or higher (i.e., black youth saw 90% more ads compared with white youth) suggests that companies purchased advertising during programming that was disproportionately viewed by black youth and could indicate advertising targeted to this audience. In 2013, every unhealthy drink category had a black to white teen targeted ratio of 1.9 or higher (see **Table 42**). Black children and teens saw more than twice as many ads for energy drinks, iced tea, and regular soda compared

with white children and teens. Black teens also saw 130% more ads for flavored water than white teens saw.

In contrast, targeted ratios for diet drinks, 100% juice, and water were lower than targeted ratios for unhealthy drink categories. Of note, differences in exposure to 100% juice and diet soda TV ads for black versus white youth were comparable to differences in amount of TV viewing.

Differences by company and brand. **Ranking Table 11** presents the number of ads viewed by black youth in 2010

Table 43. Brands with the highest black to white targeted ratios in 2013

Company	Brand	Category	Black children (2-11 years)		Black teens (12-17 years)	
			Average # of ads viewed	Targeted ratio vs. white children	Average # of ads viewed	Targeted ratio vs. white teens
Coca-Cola	Gold Peak	Iced tea	0.8	53.7	1.0	33.6
Coca-Cola	Simply	Fruit drink	0.2	23.3	0.4	19.4
Coca-Cola	Sprite	Regular soda	3.0	5.8	6.6	4.1
Coca-Cola	Coca-Cola	Regular soda	12.2	3.0	20.2	3.2
Coca-Cola	Vitamin Water	Flavored water	8.7	3.8	19.6	2.5
Dr Pepper Snapple Group	Sun Drop	Regular soda	10.4	3.2	21.8	2.5
Dr Pepper Snapple Group	Snapple	Iced tea/brand	7.3	2.4	12.3	2.3
Innovation Ventures	5-hour Energy	Energy drink	60.4	2.7	137.8	2.2
Sunny Delight Beverages	Sunny D	Fruit drink	19.5	1.9	23.3	2.2
Red Bull	Red Bull	Energy drink	18.8	2.6	42.2	2.1
Kraft Foods	Capri Sun Roarin' Waters	Flavored water	35.7	1.5	23.7	2.1
PepsiCo	Mtn Dew	Regular soda	13.5	2.4	30.6	2.0
PepsiCo	Gatorade	Sports drink	28.8	2.1	56.6	1.9
Unilever	Lipton	Iced tea	6.7	2.2	11.6	1.8
Ocean Spray	Ocean Spray	Fruit drink	9.5	1.9	11.6	1.6

Bold numbers indicate a high black:white targeted ratio
Highlighting indicates children's drinks
Source: Rudd Center analysis of Nielsen data (2014)



5-hour Energy ads appealed to youth through humor



Gatorade TV ad featuring NBA players Kevin Durant and Dwayne Wade

and 2013 by brand and company, including targeted ratios. Overall, brand rankings for number of ads viewed by black youth were similar to those reported for all youth. 5-hour Energy was responsible for the most ads viewed on average for all children and teens, followed by Capri Sun Roarin' Waters for all children and Gatorade for all teens. Company rankings also were similar. PepsiCo advertised the most to all youth with one exception: black teens saw the most ads for 5-hour Energy. Dr Pepper Snapple Group ranked third in companies advertising sugary drinks to black youth, similar to its third and fourth ranking in TV advertising to all teens and children.

Five Coca-Cola Co. brands had the highest targeted ratios of ads viewed by black versus white youth, including Sprite – black children and teens saw four to six times as many ads for

this brand compared with white children and teens – as well as Coca-Cola and Vitamin Water (see **Table 43**). Sun Drop, a Dr Pepper Snapple Group regular soda, and Snapple iced tea, also appeared to target black youth who saw 2.3 times or more ads for these brands compared to white youth. Two PepsiCo brands – Mtn Dew and Gatorade – also had relatively high targeted ratios of black to white youth.

In addition, energy drink companies advertised relatively more to black youth than to white youth. 5-hour Energy accounted for 22% of all ads viewed by black children and 28% of ads viewed by black teens, with targeted ratios of 2.7 and 2.2, respectively. Further, black children and teens were 2.6 and 2.1 times more likely to see ads for Red Bull, compared with white children and teens.

Targeted marketing on the internet

Internet targeted marketing

Definitions

Hispanic youth targeted index

The percent of Hispanic youth (2/6-17 years)* visiting the website divided by the percent of all youth (2/6-17 years) visiting. For example, a Hispanic youth targeted index of 200 indicates that Hispanic youth are twice as likely to visit the website compared with all youth.

Black youth targeted index

The percent of black youth (2/6-17 years)* visiting the website divided by the percent of all youth (2/6-17 years) visiting.

*comScore changed its age breaks for black youth in 2013. From Jan-June 2013 the demographic group included 6- to 17-year-olds, but it included 2- to 17-year-olds from July-Dec 2013.

To identify potential targeted marketing on the internet, we quantify exposure by black and Hispanic youth to beverage company websites and identify the sites they visited disproportionately more often compared with all youth.

Hispanic youth exposure to beverage company websites

Table 44 presents exposure data for the 19 websites in our analysis that averaged 1,000 or more unique Hispanic youth visitors monthly in 2013, including targeted indices. On average, Hispanic youth were 93% more likely to visit these websites compared with all youth.

Ten of the sites with the most Hispanic youth visitors also were visited relatively more often by Hispanic compared with all youth. 5HourEnergy.com ranked first in both Hispanic and all youth visitors, but Hispanic youth were 60% more likely to visit the site compared with all youth. 7UP.com and Sprite.com had the highest Hispanic targeted indices; Hispanic youth were approximately six times more likely to visit these websites compared to all youth. Of note, these two sites ranked numbers 22 and 39 in visits by all youth, but 7 and 18 for Hispanic youth. Hispanic youth also were two to four times more likely to visit DrinkNOS.com, ICoke.com, TumEYummies.com, and RedBull.tv.

Table 44. Hispanic youth visitors to beverage company websites

Company	Website	Average monthly Hispanic youth (2/6-17 years) unique visitors (000)	Targeted index
Innovation Ventures	5HourEnergy.com	31.1	160
Coca-Cola	MyCokeRewards.com	7.3	67
PepsiCo	Pepsi.com	6.0	111
Red Bull	RedBullUSA.com	3.6	93
PepsiCo	Gatorade.com	3.4	102
Red Bull	RedBull.com	2.7	50
Coca-Cola	Sprite.com	2.5	572
Coca-Cola	DrinkNOS.com	2.2	204
Coca-Cola	Coca-ColaScholars.org	2.1	132
Coca-Cola	ICoke.com	1.5	237
PepsiCo	PepsiCo.com	1.4	69
BYB Brands	TumEYummies.com	1.4	360
Monster Energy	MonsterEnergy.com	1.4	57
Dr Pepper Snapple Group	DrPepper.com	1.3	49
Coca-Cola	VitaminWater.com	1.3	90
Rockstar	RockstarMayhemFest.com	1.2	73
Coca-Cola	Coca-ColaCompany.com	1.1	68
Dr Pepper Snapple Group	7UP.com	1.1	601
Red Bull	RedBull.tv	1.0	204

Bold numbers indicate a high targeted index for Hispanic youth of 110 or more

Highlighting indicates children's drinks

Source: comScore Media Metrix Key Measures Report (2-17 years for January-June, 2013 and 6-17 years for July-December 2013)



Spanish-language pages from 5HourEnergy.com and 7UP.com

In contrast, nine websites on the top-20 list of websites visited most often by all youth were visited relatively less often by Hispanic youth, including VitaminWater.com (with a targeted index of 90), RockstarMayhemFest.com (73 targeted index), Snapple.com (39 targeted index), and MountainDew.com (31 targeted index).

Black youth exposure to beverage company websites

Table 45 presents exposure data for the 13 websites in our analysis that averaged 1,000 or more unique black youth visitors monthly in 2013, including targeted indices. On average, black youth were 34% more likely to visit beverage company websites compared with all youth.

As with all youth, 5HourEnergy.com and MyCokeRewards.com attracted the most black youth visitors. Black youth were similarly like to visit 5HourEnergy.com, but 25% less likely to visit MyCokeRewards.com, compared with all youth. Welch's.com had the highest targeted index: black youth were 2.5 times more likely to visit the site compared with all youth. Black youth also were more likely to visit Gatorade.com (which ranked third in number of black youth visitors compared with sixth for all youth), MountainDew.com, and OceanSpray.com. However, black youth visited other sites that were popular with all youth relatively less often, including RockstarMayhemFest.com (with a targeted index of 9), DrinkNOS.com (59 targeted index), Snapple.com (65 targeted index), and ICoke.com (86 targeted index).

Table 45. Black youth visitors to beverage company websites

Company	Website	Average monthly black youth (2/6-17 years) unique visitors (000)	Targeted index
Innovation Ventures	5HourEnergy.com	16.7	98
Coca-Cola	MyCokeRewards.com	7.1	75
PepsiCo	Gatorade.com	4.8	162
PepsiCo	Pepsi.com	4.2	90
Red Bull	RedBull.com	3.8	80
Dr Pepper Snapple Group	DrPepper.com	2.3	94
PepsiCo	PepsiCo.com	1.9	101
Red Bull	RedBullUSA.com	1.8	53
PepsiCo	MountainDew.com	1.4	123
Coca-Cola	Coca-ColaCompany.com	1.4	98
Coca-Cola	Coca-ColaScholars.org	1.3	97
Welch Foods Inc.	Welchs.com	1.1	248
Ocean Spray	OceanSpray.com	1.0	142

Bold numbers indicate a high targeted index for black youth of 110 or more

Source: comScore Media Metrix Key Measures Report (2-17 years for January-June 2013 and 6-17 years for July-December 2013)

Summary of marketing to Hispanic and black youth on TV and the internet

Seven companies spent \$83 million to advertise sugary drinks and energy shots on Spanish-language TV in 2013, an increase of 44% versus 2010 and on average 14% of their total TV advertising budgets. By comparison, companies spent just \$9 million in total to advertise diet drinks, 100% juice, and water. Both PepsiCo and Dr Pepper Snapple Group substantially increased their Spanish-language advertising spending for sugary drinks by \$17 million and \$13 million, respectively. A new product, SK Energy, also spent \$17 million in 2013. Of note, SK Energy and 7UP only advertised on Spanish-language TV, while Dr Pepper Snapple Group and Sunny D devoted a relatively high one-third of their total TV advertising budgets to Spanish TV. In contrast, Coca-Cola Co. reduced its Spanish-language TV advertising by 38% (although the company still ranked second in spending), while Red Bull and Kraft Foods virtually eliminated their Spanish-language TV advertising.

Hispanic preschoolers and children saw 23% and 32% more Spanish-language TV ads for unhealthy drinks in 2013 than in 2010. As in 2010, Hispanic preschoolers saw more of these ads than either Hispanic children or teens saw. However, Hispanic teens' exposure did not increase from 2010 to 2013. As a result, in 2013 Hispanic children saw more Spanish-language ads for sugary drinks and energy shots than Hispanic teens saw.

Black children and teens saw more than twice as many TV ads for sugary drinks and energy drinks compared with white children and teens in 2013. Compared with 2010, this gap increased as advertising to white youth declined at a greater

rate than advertising to black youth. Although black children and teens also watch more television than their white peers, this difference does not explain the entire difference in number of ads viewed. Brands with relatively high ratios of ads viewed by black compared with white youth included Vitamin Water (2.5), 5-hour Energy (2.2), and Red Bull (2.1). In the regular soda category, black teens saw four times as many ads for Sprite and three times as many Coca-Cola ads, compared with white teens. In contrast, black teens saw just 70% more ads for plain water, 60% more diet soda ads, and 50% more ads for 100% juice. These differences were comparable to differences in amount of TV viewing between black and white teens.

As found in our analysis of all youth visitors to beverage company websites, 5HourEnergy.com and MyCokeRewards.com attracted the most Hispanic and black youth visitors. However, some websites also attracted disproportionately high numbers of Hispanic or black youth visitors. For example, 7UP.com and Sprite.com had the highest Hispanic targeted indices; Hispanic youth were approximately six times as likely to visit these sites compared with all youth. In addition, Welchs.com had a high targeted index for black youth, who were 2.5 times as likely to visit the site compared with all internet visitors, and black youth were 62% more likely to visit Gatorade.com. Overall, Hispanic youth were 93% more likely to visit the beverage company websites in our analysis compared with all youth, and black youth were 34% more likely to visit.

Multicultural events and sponsorships

Beverage companies spend more to promote events and sponsorships specifically aimed at youth than companies in any other food category.¹⁵ The three largest beverage companies (PepsiCo, Coca-Cola, Dr Pepper Snapple Group) also have publicly commented on their strategies to appeal to multicultural youth.¹⁶ For example, Coca-Cola estimates that 86% of its growth through 2020 will come from multicultural youth. PepsiCo and Dr Pepper Snapple Group have noted their focus on sponsorships and events to attract multicultural youth and the “crossover” appeal of this strategy in reinforcing the “coolness” of their products.¹⁷ Although we could not comprehensively track these typically locally based marketing efforts, examination of the business press highlights many examples of events and sponsorships that appear to be aimed specifically at Hispanic and black youth, primarily for the companies' regular soda brands.

coca-cola

Coca-Cola Co. has highlighted its strategy to appeal to all consumers in a changing America¹⁸ and has stated that its focus on multicultural youth – Hispanic consumers in particular – is vital to the company's future growth.¹⁹ To this end, the company sponsors the Hispanic Scholarship Fund,²⁰ which provides higher education support for Latino students, and NAACP Project HELP,²¹ a health education program to improve quality of life for African-Americans. For over 30 years in Mexico and 10



Coca-Cola sponsorship of “Balon Rojo” youth soccer

years in the US, Coca-Cola has sponsored the Mexican National Team (soccer).^{22,23} In its Never Stop Believing campaign, this sponsorship was highlighted in TV ads, billboards, and a youth soccer workshop. Coca-Cola has also partnered with FIFA World Cup²⁴ and sponsors Club Balon Rojo, which is a soccer workshop intended to motivate Latino teens to exercise.

Coca-Cola also uses promotions to appeal to black teens. For example, the company sponsored shows on Black Entertainment Television (BET), such as Wild Out Wednesday, where performers compete in R&B, hip hop, and step dance competitions, and the Viewer’s Choice Awards for music and entertainment.²⁵ In 2012, the company’s Pay It Forward campaign offered 16- to 19-year-olds the chance to win workshops with Essence president Michelle Ebanks, GRAMMY-winner/philanthropist Ne-Yo, and fashion designer Tracy Reese in honor of Black History Month. Entrants were required to sign up on MyCokeRewards.com.²⁶

Dr Pepper Snapple Group

Dr Pepper’s crossover strategy features Pitbull as the brand’s ambassador. The Cuban-American rapper and Latin GRAMMY winner has strong young, urban Hispanic appeal. His song Vida 23 was written to advertise the brand’s 23 flavors.²⁷ Dr Pepper also sponsors soccer events, such as the Dr. Pepper Fair Play tournament²⁸ and the Dr Pepper Dallas Cup (since 2006), a youth club soccer tournament where the company donates

\$5,000 in sports gear to each of the eight winning teams.²⁹

Another Latino-targeted brand, 7UP, has been an official sponsor of the Latin GRAMMYs since 2010. In 2013, its Live it UP contest awarded seven Enrique Iglesias fans with a private concert.³⁰ In its more recent 2014 7x7Up campaign, the brand sponsored seven shows with seven popular electronic dance music artists, and kicked off events in Chile and Miami³¹ to reach Latino youth.³² 7UP was also the official soft drink of the 2013 CONCACAF Gold Cup (Confederation of North, Central American and Caribbean Association Football soccer championship). To promote the Gold Cup, 7UP used “consumer promotions, retail merchandising, ticket giveaways, premium offers, in-game advertising, product sampling and inclusion in promotional marketing materials, among other activities.”³³ The brand also sponsors Alianza de Futbol, an amateur Hispanic soccer organization in the United States, with logos appearing on players’ shirts and 7UP tents at games.³⁴

Pepsico

Pepsi has also commented on its strategy to reach a broad range of young consumers through marketing with crossover appeal.^{35,36} For example, the brand has sponsored black artists such as Nicki Minaj (a rap artist and winner of multiple BET awards), including providing a branded livestream to her free New York City concert.³⁷ Its partnership with Beyonce is another example of a celebrity spokesperson with crossover



7UP soccer sponsorship and logo on a young player’s jersey



Celebrities with crossover appeal in Pepsi ads

appeal.^{38 39} In 2013, Pepsi sponsored concert tours for major Latino musicians and partnered with Tr3s, a music television network for young Hispanics, to promote its Viva Hoy (Live for Now) campaign.⁴⁰ The brand also used Latino actor, William

Levy, to endorse Pepsi NEXT. He filmed several humorous videos in both Spanish and English, and supported the campaign on social media platforms.

Marketing to Hispanic and black youth

Signs of progress

- On Spanish-language TV, Kraft Foods and Red Bull eliminated virtually all advertising (both companies had spent approximately \$3 million in 2010). Coca-Cola also reduced its advertising spending on Spanish-language TV by 38% and advertising for 5-hour Energy went down 50%.
- Black children and teens saw 32% and 27% fewer TV ads for sugary drinks and energy drinks in 2013 compared with 2010, although this decrease was smaller than the decline in ads viewed by white youth.

Continued reasons for concern

- Seven beverage companies spent \$83 million to advertise sugary drinks and energy shots on Spanish-language TV in 2013, 44% more than was spent in 2010. Dr Pepper Snapple Group almost tripled its Spanish-language advertising to become the largest beverage advertiser in this medium, and Sunny D increased its advertising by 18%. PepsiCo and SK Energy did not advertise in 2010, but each spent \$17 million in 2013.
- Overall, companies allocated 14% of their TV advertising budgets to Spanish-language TV in 2013. However, Dr Pepper Snapple and Sunny D devoted a relatively high one-third of all TV advertising spending to Spanish TV, while three brands advertised exclusively on Spanish TV: SK Energy, 7UP, and Fuze iced tea. Further, just 10% of beverage companies' Spanish-language TV advertising budgets promoted diet drinks, 100% juice, and water.
- Hispanic preschoolers and children saw 23% and 32% more unhealthy drink ads on Spanish-language TV in 2013 than in 2010. Hispanic preschoolers saw approximately one-third more of these ads than either Hispanic children or teens saw, while children saw somewhat more ads than teens saw.
- Overall, black youth saw more than twice as many TV ads for sugary drinks and energy drinks compared with white youth, and this disparity increased in 2013 versus 2010. Black teens saw four times as many Sprite ads and three times as many Coca-Cola ads than white teens saw. Other brands with high black to white targeted ratios for teens included Vitamin Water, Sun Drop, Snapple, 5-hour Energy, and Red Bull. In contrast, black teens saw 50% to 70% more TV ads for plain water, diet soda, and 100% juice, comparable to differences in amount of TV viewing for the two groups.

Continued reasons for concern (continued)

- In 2013, Hispanic youth were 93% more likely to visit all beverage company websites compared with all youth, and black youth were 34% more likely to visit these websites. Websites that attracted disproportionately high numbers of Hispanic youth included 7UP.com and Sprite.com, and websites that were relatively more popular with black youth included Welch.com and Gatorade.com. As with all youth, 5HourEnergy.com and MyCokeRewards.com attracted the most Hispanic and black youth visitors.
- Coca-Cola, Dr Pepper, 7UP, and Pepsi promoted numerous youth-oriented music and sports events and sponsorships to appeal to multicultural youth.