

The restaurant industry, including quickserve or fast food restaurants, has said it wants to be part of the solution to the childhood obesity crisis.¹

Two of the largest fast food advertisers, McDonald's and Burger King, have joined the Children's Food and Beverage Advertising Initiative (CFBAI) and pledged to advertise only "better-for-you" choices to children.² The majority of restaurants have introduced more nutritious options to their menus for both children and adults.³ Most fast food restaurants also post detailed nutrition information about menu items on their websites. According to the National Restaurant Association, these efforts are part of an industry initiative to address "consumers' interest in more healthful food options."⁴ But one critical question remains: Will these industry promises reverse the unhealthy defaults in the current fast food marketing environment that make it too easy for people to consume the least healthy options?

The data in this report about what young people order at fast food restaurants and what parents order for their children demonstrate that restaurants have a long way to go before a visit to a fast food restaurant ceases to harm young people's health. Children consumed up to 200 excess calories (above recommended calorie limits for lunch and dinner meals) during the average visit to nine of the twelve restaurant chains in our analysis. Teens consumed between 100 and 700 excess calories at ten restaurants. In addition, 30% or more of all fast food calories came from sugar and saturated fat, two nutrients that young people already consume in excess.⁵ Sodium consumed at fast food restaurants also exceeded maximum recommended intake for a lunch or dinner meal: by 1,000 mg at Subway, Pizza Hut, KFC, and Domino's for children and teens, and at Burger King, Wendy's, and Taco Bell for teens. Excess calories and sodium consumed by African American youth were generally higher than those consumed by white youth at most fast food restaurants.

If visiting fast food restaurants was an occasional occurrence or reserved for a special treat, this picture of what young people consume at fast food restaurants would not be problematic. However, research demonstrates that fast food has become a staple of young people's diet. Every day, one-third of young people (2-17 years) consume fast food.⁶ In 2003-2004, 59% of adolescents consumed fast food in the past two days and fast food contributed 16% to 17% of adolescents' total caloric intake.⁷

Fast food marketing

While all this consumption is good for fast food companies' bottom line, it is terrible for young people's health. If the restaurants are sincere about wanting to do what they can to prevent obesity, they must transform their marketing practices with substantial improvements to all components of their marketing plans, including menu composition,

external advertising, and marketing inside the restaurants, to substantially reduce the unhealthy impact of fast food on young people's diet and health.

Menu composition

Of the almost 2,900 different items on the regular menus of the twelve restaurants in our analysis, just 17% qualified as healthful choices (i.e., received good NPI scores for overall nutritional quality) and did not exceed recommended calories and sodium for the average moderately active teen. However, the menu items that met these three nutrition criteria were predominantly beverages. In contrast, 12% of lunch/dinner sides qualified as healthy, and 5% or less of lunch/dinner main dishes, snacks, and breakfast items met the criteria. Of 3,000 possible kids' meal combinations examined (including main dishes, sides, and beverages), 15 (0.5%) met the three nutrition criteria for elementary school-age children and 12 met the criteria for preschool-age children. Just two restaurants, Subway and Burger King, offered a main dish kids' meal option with an NPI score that qualifies as healthy and would be allowed to be shown on children's television in the United Kingdom. Overall, 91% of kids' meal combinations at the twelve restaurants exceeded the recommended maximum calories for lunch or dinner for a preschool-age child.

Although the majority of items on restaurants' regular and kids' menus did not qualify as nutritious choices, most restaurants offered some healthy options. For example, at most restaurants, customers could order a chicken salad or grilled chicken sandwich, each with 700 or fewer calories and healthy NPI scores. Eight restaurants promoted on their websites a healthy menu with an average of two dozen lower-calorie items. These items were also more likely to meet healthful NPI scores compared to items on the restaurants' regular menus. In addition, most restaurants (except KFC, Taco Bell, and Dairy Queen) offered a fruit or vegetable side and plain milk and/or 100% juice with their kids' meals.

Some restaurants also appear to have responded to concerns that have been raised by the public health community about pricing that favors unhealthy foods, serving sizes, and healthy food availability.⁸ For example, lower-priced healthy items were available on many restaurant menus. Items on most value-priced dollar menus had smaller average serving sizes and fewer calories when compared to other items on restaurants' menus. Several restaurants offered side salads, low-fat chicken sandwiches, and fruit for about \$1. In addition, pricing for healthier and less healthy versions of sandwiches was often similar (e.g., grilled and fried chicken sandwiches, egg white and regular egg breakfast sandwiches).

However, most restaurants continued to offer large and extra-large sizes of burgers, soft drinks, and french fries. According to NPD, these three categories were the most common menu items ordered at fast food restaurants. Five restaurants sold an extra-large burger with at least 800 calories for less than \$4.50

(McDonald's, Burger King, Taco Bell, Sonic, and Dairy Queen), and Wendy's sold a 1,300-calorie burger for \$7.00. Compared to 2006, McDonald's remained the only restaurant to have eliminated its extra-large (i.e., supersized) soft drinks and fries.⁹ Five restaurants (Subway, Burger King, Taco Bell, KFC, and Sonic) sold fountain drinks in sizes of 40 oz. or more, the equivalent of five servings. Burger King, Wendy's, and Dairy Queen sold french fries in a serving of more than 180 grams, totaling 500 calories or more. The names that restaurants assign to portion sizes also make it difficult for consumers to know how much food they are consuming. For example, Burger King and Wendy's renamed their "small" french fries to a "value" size that was the same size as McDonald's "small." Their new "small" became the same size as the "medium" at McDonald's, Wendy's, and Sonic. The medium-sized french fries packages at McDonald's and Burger King looked nearly identical, but Burger King's contained 25 additional grams of food. Wendy's was the only restaurant to provide nutrition information about their beverages "with ice." As a result, they sold a "medium" soft drink in a 32 oz. cup, but only reported calories and other nutrients for a 20 oz. serving.

The marketing is relentless

Fast food advertisers spend a staggering amount on media to draw customers into their restaurants to consume this primarily unhealthy fare: more than \$4.2 billion in the United States in 2009. The majority of the money (86% or \$3.6 billion) supported TV advertising, although restaurants also spent more than \$200 million on radio advertising and more than \$150 million on outdoor advertising (e.g., billboards, transit signs). As a result, young people viewed enormous amounts of fast food advertising. *Every day*, the average preschooler saw 2.8 fast food ads on television, the average child saw 3.5, and the average teen saw 4.7. Teens listened to approximately one radio ad per day. Children were exposed to more than 1,200 traditional fast food ads per year while teens saw and heard more than 2,000. Although it is difficult to measure exposure to signs placed outside restaurants, fast food restaurants used this strategy extensively to encourage visits by potential customers passing by. The average fast food restaurant had 3.8 outdoor signs per location, and seven restaurants averaged four or more outdoor signs per location.

Increasingly, fast food restaurants have expanded into newer forms of marketing that are relatively inexpensive and more difficult to quantify. We identified 55 different websites sponsored by the twelve restaurants in our analysis, including main restaurant sites, child-targeted sites, and special interest sites (e.g., charity and scholarship, entertainment, racial or ethnic sites). Several websites had as many as 200,000 unique child and teen visitors every month. Young people spent seven minutes or more per month interacting with some of the most engaging sites. The twelve restaurants in our analysis also placed banner ads with special promotions, ads for menu items, and links to their own websites on other company (i.e., third-

party) websites, including on many sites visited primarily by children and teens. Banner ads from these restaurants reached up to 70 million unique viewers every month. The use of social and viral media by fast food restaurants has also expanded exponentially. As of July 2010, nine fast food restaurants each had more than one million fans on their Facebook pages, most restaurants had thousands of Twitter followers, and four restaurants accrued more than one million viewers of their videos on YouTube. The use of mobile marketing by fast food restaurants is in its early stages, but most restaurants placed banner ads on third-party mobile websites, eight have introduced downloadable iPhone applications, and a few have begun to conduct text message advertising to customers who opt-in to this feature. Fast food marketing is becoming ever more ubiquitous and strategically targeted.

Fast food advertising is highly concentrated among just a few restaurants. McDonald's alone spent \$900 million in media in 2009, an increase of \$100 million from 2008. YUM! Brands restaurants combined (KFC, Taco Bell, and Pizza Hut) spent more than \$700 million in 2009; and Subway, Burger King, and Wendy's each spent more than \$280 million. Together, these seven restaurants accounted for more than 60% of fast food media spending and three-quarters of fast food TV ads viewed by children and teens. These restaurants also purchased more than two-thirds of fast food radio and outdoor media. McDonald's and Burger King dominated marketing on the internet as well with twelve of the forty websites visited most often by young people. More than 659,000 unique children and teens visited McDonald's websites every month. Several restaurants with relatively small marketing budgets also had a substantial presence on the internet. For example, Dominos.com and PizzaHut.com had more young visitors than the other fast food websites in our study. These two restaurants also placed the most banner ads on third-party websites. KFC.com and Starbucks.com also appeared in the top 10 most frequently visited fast food websites in our study. In spite of its low \$29 million advertising budget, Starbucks dominated fast food social media across all platforms. With 11 million fans in 2010, Starbucks reportedly had more fans on Facebook than any other marketer.¹⁰

In spite of the vast amounts spent by fast food marketers, we found surprisingly little variation in their marketing messages and the products they promoted. Restaurants appeared to compete primarily by introducing new menu items and promoting the "value" of their foods. A few restaurants (notably Subway and Wendy's) promoted the quality of their food. Messages about good value or cheap food were used in almost one-half of TV ads targeting a general audience, followed by new or improved (36%) and quality food (30%). Similarly, 30% of ads viewed by children and 44% of those viewed by teens promoted individual lunch and dinner menu items, and 15% to 22% promoted restaurants' dollar/value menus and/or combo meals. Banner advertising and social media marketing also predominantly emphasized special

offers, and value/cheap and new/improved messages; and promoted new menu item introductions, dollar/value menus, and combo meals. In contrast, just 5% of general audience TV ads promoted foods as low-fat or low-calorie. Healthy menu items comprised 3% to 4% of TV ads viewed by children and teens. Main restaurant websites were the only form of marketing with any noticeable messages about health and nutrition; these appeared on 32% of main restaurant website pages.

In addition to significant amounts of marketing designed to reach a broad audience (including children and teens), we also identified a number of marketing practices used more selectively by some restaurants to reach a specific target market. We used the following three criteria to identify marketing that was targeted to children, teens, and African American and Hispanic youth:¹¹ 1) It was placed to reach one demographic group disproportionately more than another (i.e., children and teens compared to adults, African American compared to white youth). 2) Creative executions featured main character actors of the same age, race, and/or ethnicity as one of the targeted groups, addressed the groups directly (e.g., messages to kids to “ask their parents” or Spanish-language advertising), or promoted products specifically for these groups (e.g., kids’ meals). 3) It used techniques that appealed disproportionately to one of these targeted groups (e.g., licensed characters for children, social media for teens).

Marketing targeted to children

Although eight restaurants offered kids’ meals designed for children, just four used marketing to address children directly outside the restaurant: McDonald’s, Burger King, Subway, and Dairy Queen (see **Table 58**). The four restaurants had websites designed specifically for children; three had child-

targeted ads on TV (McDonald’s, Burger King, and Subway); and three used banner ads with child-targeted content on third-party websites (McDonald’s, Burger King, and Dairy Queen).

Among the four restaurants with child-targeted marketing, the two CFBAI participants (McDonald’s and Burger King) had by far the most advertising targeted to children. Children viewed approximately one child-targeted ad per day for these two restaurants (in addition to ads for other products not exclusively targeted to children). Since 2007, McDonald’s and Burger King have increased their TV advertising to children (6-11 years) by 26% and 10%, respectively. In addition, two McDonald’s child-targeted websites were among the most frequently visited advergaming sites on the internet. Every month, 100,000 to 200,000 different children visited these two McDonald’s sites. Children spent on average eleven minutes per month on HappyMeal.com. McDonald’s also sponsored a website targeted to preschoolers with games to teach them numbers and letters (Ronald.com). All child-targeted websites contained numerous engaging and interactive devices to entertain children and keep them on the website. They included virtual worlds, advergaming, videos, points accumulation to purchase virtual items, and tie-ins with movies, TV shows, and other promotions. McDonald’s and Burger King also prominently featured their child-targeted website URLs on kids’ meal packages to encourage further website visits.

Dairy Queen was the only restaurant on its child-targeted websites to blatantly promote unhealthy foods, including burgers, french fries, and Dilly and Blizzard ice cream treats. McDonald’s, Burger King and Subway featured their healthy sides and beverages and their healthiest main dish options in all forms of child-targeted marketing. However, perhaps most surprising about McDonald’s and Burger King’s child-

Table 58. Restaurants with child-targeted marketing in 2009*

	TV ads viewed in 2009			Websites: Average unique visitors per month	Banner ads: Average views per month
	CFBAI participant	Preschoolers (2-5 years)	Children (2-11 years)	Children (2-11 years) (000)	Placed on youth websites (000)
McDonald’s	X	230	262		16,366
HappyMeal.com				189.3	
McWorld.com				100.9	
Ronald.com					
Burger King	X	102	125		13,464
ClubBK.com				35.2	
Subway		25	32		
SubwayKids.com				1.4	
Dairy Queen					11,200
DeeQs.com				3.4	
BlizzardFanClub.com				4.4	

Source: The Nielsen Company; comScore Inc.

targeted marketing was how frequently they did not picture or mention specific foods in their child-targeted marketing. The McDonald's Happy Meal box (with its smiling golden arch) was prominent in all forms of child-targeted marketing. However, when McDonald's "better-for-you" foods such as apple dippers and milk appeared, they were usually presented briefly and/or in the background. One-quarter of children's exposure to child-targeted McDonald's ads promoted the brand only and did not feature any food products, including Happy Meals. This approach contrasted with general audience ads, one-quarter of which prominently featured food onscreen more than half the time. Child-targeted Burger King ads did not focus on the food either. Instead, approximately half featured a kids' meal tie-in with movies, TV shows and video games. Nearly all used humor and/or a fun/cool message that appealed to children's emotions. Using licensed characters to promote unhealthy foods has been shown to increase how much preschoolers like the taste of those foods.¹² It is not surprising then that children reported liking foods presented in a McDonald's wrapper more than the same foods in a plain wrapper.¹³

These child-targeted ads are also likely to influence parents directly and increase their likelihood to take their children to fast food restaurants. Research by Grier and colleagues demonstrated that higher exposure to fast food advertising by parents was associated with increased frequency of taking their children to these restaurants because the advertising influenced their beliefs about how often other parents took their children.¹⁴ The fact that restaurants now market healthier options for children also likely helps to alleviate parents' concerns about the nutritional quality of fast food.

Children were also exposed to significant amounts of advertising not targeted to them specifically. In fact, just one-third of the fast food ads that children viewed on TV were for kids' meals and promotions. They also viewed every day at least two fast food ads that promoted unhealthy menu items and used the value/cheap and new/improved messages designed to reach a broader general audience. Children were also frequent visitors to many restaurants' main websites including PizzaHut.com (195,000 unique under-12 viewers per month), Dominos.com (176,000 unique child viewers), BurgerKing.com (42,000 child viewers), and KFC.com, Starbucks.com, and Wendy's.com (34,000-35,000 child viewers each).

Targeting teens

With few exceptions, adolescents viewed the same number of or more fast food ads that adults viewed. On television and the internet, many fast food ads used humor, celebrities, entertainment tie-ins, and other techniques that appeal specifically to this age group. Lower fast food prices are related to higher BMI for adolescents, but not adults.¹⁵ Therefore, the value and special pricing messages that commonly appear are also likely to negatively affect young people more than adults. In addition, most restaurants used

social media extensively, a venue that most teens frequent. It can be argued, therefore, that the majority of fast food advertising is targeted to teens.

However, we did find several instances of restaurants and products that were advertised considerably more often to teens than to adults and had content designed specifically to appeal to this age group. Teens viewed more TV ads for Taco Bell and Burger King overall than adults viewed, and teens were also exposed to more Taco Bell radio ads. In addition, compared to adults, teens were exposed to more TV ads that promoted snack items from Dairy Queen, Sonic, and Domino's, and lunch/dinner items from Sonic and Subway. Content analyses of these ads highlighted frequent use of juvenile humor and movie and other entertainment tie-ins. Taco Bell, Sonic, and Burger King also promoted their late-night snack menus in several ads; and Domino's pushed its online ordering application.

On the internet, teens visited Dominos.com, PizzaHut.com, and McDonalds.com most frequently; each site averaged 160,000 or more unique teen visitors every month. In addition, banner ads for Domino's, Sonic, and Pizza Hut; as well as Taco Bell's Fruitista Freeze, Volcano menu and value menu; KFC grilled chicken (Unthink campaign); McDonald's McCafe beverages; and Wendy's hamburgers/sandwiches were placed disproportionately on youth websites. Social media also commonly promoted snack items (e.g., Wendy's Frosty and Dairy Queen Blizzard) and pricing and other food promotions.

Targeting African American and Hispanic youth

African American children and teens viewed approximately 50% more television compared to white children and teens; therefore, they were also exposed to approximately 50% more fast food ads on television. On average, African American children saw 4.1 fast food TV ads every day in 2009 and African American teens saw 5.2. In addition, African American children appeared to watch relatively more general audience television (versus children's television) than white children. Consequently, they viewed twice as many ads targeted to a general audience for nearly twenty different restaurant product categories. Hispanic children and teens were exposed to approximately one ad per day on Spanish-language television in addition to ads they viewed on English-language television. With the exception of four McDonald's child-targeted ads, the Spanish-language ads were targeted to a general audience.

McDonald's and KFC advertised disproportionately more often to African American teens who viewed 75% more advertising for both restaurants compared to white teens. Ads with higher than expected numbers of young African American viewers included ads for McDonald's lunch/dinner items, branding only, value/combo meals and breakfast, and KFC healthy options. Content analysis of general audience TV

ads confirmed that McDonald's used African American main characters in the highest proportion of its ads (23%) compared to other restaurants. KFC also used black characters to promote its under-400 calorie meal. In addition, Dairy Queen used African American characters in 19% of TV ads promoting its Blizzard ice cream treat and ice cream cake, and Subway featured African Americans in 10% of ads, including two with celebrity athletes. While we recognize the value of advertising that reflects a multicultural society, the poor nutritional quality of products sold at fast food restaurants may be even more dangerous for African American youth who face higher risk for obesity and obesity-related diseases compared to white youth.¹⁶

Nine fast food restaurants advertised on Spanish-language TV, but McDonald's was the most frequent advertiser, accounting for one-quarter of youth exposure to Spanish-language fast food ads. Products that were advertised relatively more frequently on Spanish-language TV compared to English-language TV included lunch/dinner items from Domino's, Burger King, McDonald's, and Sonic; value/combo meals and coffee drinks from McDonald's; and snack items from Sonic. We found few differences in the overall messages used to promote these products in Spanish, although several restaurants were more likely to use physical activity, low-fat/low-calorie, and helping the community messages in their Spanish-language ads.

As with TV advertising, African American youth were also exposed to disproportionately more fast food advertising on the internet that was not targeted to them directly. McDonald's was the only restaurant with websites specifically targeted to African American (McDonald's 365Black.com) and Hispanic (MeEncanta.com) consumers. KFC.com also featured two African American-targeted subsites, accessible through its main website, including one devoted to its Pride 360 campaign to support Historic Black Colleges and Universities (HBCU) and KFCHitmaker.com, a website that celebrated African American heritage and music. We also found 20 websites (out of 39 with data available on African American youth visitors) that were visited relatively more often by African American youth than by all youth. They included four child-targeted sites (SubwayKids.com, DeeQs.com, ClubBK.com, and BlizzardFanClub.com) and four McDonald's and three Wendy's sites. Although restaurants also target African American communities with advertising through local event sponsorships and charitable donations (e.g., see events listed on McDonald's www.365Black.com website), we do not have data to quantify these locally-targeted efforts.¹⁷

Fast food marketing works

According to our survey of parents of 2- to 11-year-olds, 84% reported taking their child to at least one fast food restaurant in the past week and 39% took them to more than one. An astonishing 66% of parents reported taking their

child to McDonald's for lunch or dinner during the past week. According to parents, fast food restaurants fill a need for convenient and low-cost options to feed their children. More than half their fast food orders were placed at a drive-thru window and consumed in the car or at home. Less than 5% of parents who visited McDonald's, Burger King, and Wendy's reported that the main reason was the restaurants' healthy options. In contrast, one-third of parents visited Subway because of its healthy food.

Children also played a major role in parents' decision to visit these fast food restaurants: More than half of parents reported that their child had asked them to go to McDonald's, Burger King, Wendy's, Subway, and Pizza Hut, and 39% reported that the main reason they chose the restaurant was because their child likes it there. McDonald's marketing targeted specifically to children as young as 2 years old has captured the loyalty of millions of young children: 47% of parents reported that the main reason they took their child to McDonald's was because their child likes it there. This rate was 50% higher than the percentage who took their child to Burger King primarily because their child likes it and three times higher than the rate for parents who took their child to Subway or Wendy's.

In addition, 41% of parents reported that their child asked them to go to McDonald's at least once a week; and 15% of parents of preschoolers reported that their child asked them to go to McDonald's *every day*. When children view one ad for McDonald's every day, it is not surprising that many children ask their parents to take them there at least once per week. It also helps explain why they ask to go to McDonald's much more often than to other fast food restaurants. Burger King, the second most frequent advertiser to children, came in far behind McDonald's in number of requests by children to visit, but ahead of the restaurants that did not market to children directly. Although 15% to 19% of parents who went to McDonald's and Burger King reported that their child wanted the restaurant's toy, approximately half indicated that their child's main motivation was that he or she likes the food.

As African American youth were exposed to significantly more fast food marketing than white youth, it is also not surprising that African American parents were more likely than white parents to report that their child asked to visit McDonald's, Burger King, Domino's, and KFC. African American parents also were more likely to take their children to McDonald's, Burger King, KFC, Wendy's, and Pizza Hut. We found few significant differences in number of visits by Hispanic parents and youth compared to their white peers.

Unhealthy defaults in the restaurants

Once fast food restaurants have succeeded in drawing young people in, marketing inside the restaurants could be used to encourage customers to purchase the more nutritious options

on restaurant menus: Signs could promote their healthy menus and lower calorie options. Price promotions and special offers could encourage trial and repeat purchase of healthier items. Restaurant employees could suggest healthier options when customers place their orders. In our audit of more than 1,000 restaurants across the country, we found almost no evidence that restaurants engage in any marketing practices to improve the nutritional quality of the menu items that customers select.

Restaurants used signs extensively inside the restaurants to promote individual menu items and special deals. They averaged 14.6 signs per restaurant and placed more than one-third of signs at the counter so customers could view them as they waited in line. In addition, one in five of these signs featured price and other promotions to encourage sales of specific menu items. However, restaurants rarely used signs to encourage the purchase of healthier menu items. Items on restaurants' healthy menus appeared on just 4% of signs, and messages about health and nutrition appeared on 2%. Although signs about kids' meals tended to promote healthier side and beverage options, these signs appeared in fewer than 5% of restaurants. Just Subway and Taco Bell promoted health and nutrition messages in more than 5% of their menu item signs. Restaurants also frequently used value messages and short-term price promotions to encourage sales of high-calorie, poor quality foods. Many restaurants also prominently featured signs for sweet snacks in the dining areas, the ideal place to promote impulse purchases after the meal.

The results of our examination of sales practices at five restaurants demonstrated that the overwhelming default at nearly all restaurants examined was to provide french fries and a soft drink automatically whenever a kids' meal or combo meal was ordered. Subway was the only restaurant to offer healthy sides and beverages as the default in its kids' meals. Although McDonald's and Burger King pictured their healthy kids' meal options in child-targeted marketing, their employees mentioned the healthy side options in 8% of orders and the healthy beverage options in approximately one-quarter. They offered customers a healthy side or beverage with combo meals even less often. In addition, in 90% of combo meal orders at Taco Bell and in 30% of orders at all five restaurants, employees suggested a larger-sized meal.

At most fast food restaurants that we analyzed, it was possible to purchase a more nutritious meal for a reasonable price. As mentioned, many dollar/value menu items are smaller-sized than other menu items and most restaurants include a few nutritious options on these menus. In addition, healthier versions of sandwiches tended to be the same or even lower-priced than the least healthy versions (as most were also smaller-sized). However, at all the restaurants in our pricing analysis, the chicken salad tended to be the most expensive main dish item examined, priced even higher than the "mega" burgers offered at many restaurants. In addition, restaurants rarely promoted the value of their lower-calorie, more nutritious items in any form of marketing.

Therefore, at most of the restaurants in our analysis, it was possible to obtain a meal consisting of healthful items that did not exceed recommended calories for most teens and adults, and a kids' meal with a healthy side and beverage that did not exceed recommended calories for most elementary school-age children. Unfortunately, the marketing that occurred inside the restaurants did little to encourage purchases of these more nutritious options. Only the most determined parents and other customers who have studied the restaurants' menus and nutrition facts before visiting are likely to have the information and fortitude needed to purchase these options when they arrive at the restaurant.

Nutritional quality of food purchased at fast food restaurants

Not surprisingly then, young people and their parents overwhelmingly purchased the high-calorie, poor nutritional quality items at fast food restaurants. At three of the restaurants included in our survey (McDonald's, Burger King, and Wendy's), approximately two-thirds of parents who ordered a kids' meal for their child ordered french fries instead of the fruit side option. One-third to one-half ordered a soft drink. Parents of younger children were somewhat more likely to order the healthy sides and beverages. However, across all fast food restaurants, parents of young children ordered french fries 4.5 times more often than they ordered fruit.¹⁸ In contrast, two-thirds of parents in our survey who took their child to Subway ordered fruit or yogurt and 100% ordered juice or plain milk when purchasing a kids' meal. The most popular kids' meal main dish choice for children was chicken nuggets. Interestingly, 30% of parents in our survey believed that McDonald's chicken nuggets were somewhat to very healthy, more than twice as many who believed the hamburger to be healthy. However, both menu items receive low NPI scores (48-50) and have similar calorie, fat and sodium content.

The number of calories in the average kids' meal (616) is appropriate for elementary-school children, but too high for most preschoolers. However, in three of four restaurants in our parent survey, parents of preschoolers were more likely to order a kids' meal for their child than were parents of elementary school-age children. Across all fast food restaurant visits, approximately one-third of parents ordered a kids' meal for their child under 6, and 21% ordered one for their 6- to 12-year-old.¹⁹ Parents were more likely to order combo meals and items from the dollar/value menus for their elementary school-age child, including in 84% of visits to Subway. Across all restaurants, parents ordered these value-priced items for their older children (6-12 years) in 27% of visits.²⁰ Almost one-half of burgers ordered for older children were larger sized options such as McDonald's Quarter Pounder or Burger King's Whopper.²¹ Pizza was also more likely to be ordered by parents for their children than by older patrons.

In addition, teens often ordered many of the highest-calorie, nutrient-poor items available at fast food restaurants.²² For

example, teens ordered a large or extra-large size of french fries and soft drinks one-quarter of the time. More than 75% of burgers ordered by teens were larger sized options. Teens also purchased breads and sweets (including desserts and sweet breads) during 20% of visits, more often than any other age group, and coffee drinks (including iced and frozen coffees) at 9% of visits. Similarly, 26% of teen visits to fast food restaurants were for an afternoon or evening snack, compared to 21% of young adult and 17% of adult visits. Teens were also frequent patrons of dollar/value menus and combo meals, ordering these value-priced options during 39% of all fast food restaurant visits and two-thirds of visits to burger restaurants. In contrast, teens ordered healthier options, including grilled chicken sandwiches and main dish salads, in less than 5% of visits to fast food restaurants.

Compared to white and Hispanic youth, African American youth ordered more food items when they visited fast food restaurants, including more of the least healthy items on restaurant menus, such as breakfast items, desserts, breads and sweet breads, large-sized burgers, and fried chicken.²³ They were somewhat less likely to order sugar-sweetened carbonated beverages, but more likely to order juice and other sugar-sweetened beverages. African American parents were more likely to purchase dollar/value menu items for their children in place of kids' meals, and African American youth were more likely to purchase combo meals and large or extra-large beverages and french fries. African American youth consumed at least 10% more calories at McDonald's and Burger King, and at least 15% more sodium at McDonald's, Burger King, and Wendy's.

The role of marketing in young people's product choices

Fast food restaurants must take some responsibility for the influence of marketing on the products that young people and their parents choose to purchase. For example, children's "second-hand" exposure to advertising designed to reach a broad audience of consumers likely has a significant influence on what children want to eat and expect to eat at fast food restaurants. The predominance of messages about dollar/value menus and combo meals could help explain why older children are more likely to order these items at some restaurants. Similarly, when the majority of ads that children see are for less healthy menu items, it is not surprising that they prefer french fries and soft drinks over apples and plain milk. The sheer volume of fast food advertising designed to encourage customers to visit these restaurants is also likely to affect how frequently children want to consume fast food.

It is important to note that many fast food restaurants advertised their snack items to teens and that this age group purchased more afternoon and evening snacks at restaurants than other age groups. Unfortunately, snack items are among the least healthy and highest calorie options available at most fast food restaurants. With the exception of KFC's online

Unthink grilled chicken campaign, we found no evidence that fast food restaurants have made any attempt to promote their healthier options to teens.

The differences found in sales practices at some restaurants also demonstrate how much restaurants can do to influence consumers' choices of healthy, lower-calorie options. For example, Subway offered or automatically provided healthy side and beverage options to customers who ordered a kids' meal. Seventy-three percent of parents in our survey reported ordering a healthy side for their child at Subway, and two-thirds ordered plain milk or juice. In contrast, employees at McDonald's and Burger King rarely offered a healthy kids' meal side or beverage. Accordingly, just 28% of parents who went to McDonald's and 37% of those who went to Burger King ordered the healthy side for their child's kids' meal; and 35% ordered juice or plain milk for their child at McDonald's and 40% at Burger King. Wendy's provided another interesting point of comparison to McDonald's and Burger King. Wendy's employees offered customers a choice of beverage two-thirds of the time, and suggested flavored milk first in 18% of orders. Wendy's also featured flavored milk on some restaurant signs. As a result, 41% of parents who took their child to Wendy's reported choosing flavored milk with their kids' meals, compared to 25% at McDonald's and 13% at Burger King. Most parents in our survey also reported that their child would consume the healthy options but just preferred the french fries and soft drinks. This finding indicates that if healthy options were the default choice, most parents would buy them.

Recommendations

Young people must consume less of the calorie-dense nutrient-poor foods served at fast food restaurants. Parents and schools can do more to teach children how to make healthy choices and consume fewer calories, and why it is important to do so. Parents can research fast food menus online. They can use the information on our website (www.fastfoodmarketing.org) to learn about healthy calorie and sodium consumption for their children and to find the best options available at restaurants. But such education will be for naught unless fast food restaurants also drastically change their current marketing practices. Children and teens should not receive continuous reminders every day about the great tasting food served by these restaurants that severely damages their health. In addition, when young people visit, the restaurants should do much more to encourage the purchase of more healthful options.

Fast food restaurants must establish meaningful standards for child-targeted marketing

- These standards should apply to all fast food restaurants, not just the two restaurants who have volunteered to participate in the CFBAI.

- The nutrition criteria for foods presented in child-targeted marketing must apply to kids' meals served, not just the items pictured in marketing.
- Child-targeted marketing must do more to persuade children to want the healthy options available, not just to encourage them to ask their parents to visit the restaurants.
- Restaurants must redefine "child-targeted" marketing to include TV ads and other forms of marketing viewed by large numbers of children, but not exclusively targeted to them.
- Restaurants must expand the definition of "advertising" to include all forms of marketing viewed by children.
- McDonald's must stop marketing directly to preschoolers.

Fast food restaurants must do more to develop and promote lower-calorie and more nutritious menu items

- The focus in all forms of marketing must be reversed to emphasize the healthier options instead of the high-calorie poor quality items now promoted most extensively.
- Marketing that reaches a high proportion of teens must meet even higher nutritional standards than other forms of marketing.
- Restaurants must increase the relative number of lower-calorie, more nutritious items on their menus.
- Popular items should be reformulated to decrease the saturated fat, sodium, and calories in the average entrée.
- Kids' meal options must be developed to meet the needs of both the preschoolers and older children who consume them. Lower-calorie kids' meal options appropriate for preschoolers are needed at most restaurants. Subway and Burger King provide healthy kids' meal main dishes, but these items may not have enough calories for older children. Subway, for example, could offer a kids' meal with a 6-inch turkey and/or veggie sandwich, apples or yogurt, and plain milk or 100% juice to encourage more parents to purchase these healthy options for their older children.

Fast food restaurants must do more to push their lower-calorie and more nutritious menu items inside the restaurants when young people and parents make their final purchase decisions

- Healthier sides and beverages must be the default option when ordering kids' meals. Parents can request the french fries and soft drink if they want, but they (not the restaurant) must make that decision. A McDonald's Hamburger Happy Meal with apple dippers (no caramel sauce) and plain milk or 100% juice contains 385 calories; the same meal with french fries and a sugar-sweetened beverage contains 600. McDonald's reports that it sells "millions" of Happy Meals every year.²⁴ This one change would reduce children's consumption by billions of calories every year.
- The smallest size and most healthy version should be the default option provided for all menu items.
- Portions of menu items that come in different sizes (e.g., small, medium, and large) should be consistent across restaurants. The current situation confuses customers and is potentially misleading.
- Restaurants must promote their more nutritious items on signs inside the restaurant, and use price and other promotions to encourage customers to purchase them.

All those responsible must take action to ensure that young people visit fast food restaurants less often and, when they do visit, that they consume less of the primarily calorie-dense nutrient-poor foods typically purchased. The restaurant industry can rightly claim that parents should make decisions about what to feed their children and that teens must learn how to make healthy choices. But it is disingenuous for the industry to imply that it is only responsible for making more healthful food options available for consumers who are interested in them.²⁵ According to the data in this report, fast food restaurants spend billions of dollars in marketing every year to increase the number of times that customers visit their restaurants, encourage visits for new eating occasions and purchases of specific menu items (rarely the healthy options), and create lifelong, loyal customers. By creating more healthful items and marketing them more effectively, fast food restaurants could attract lifelong customers who will also live longer, healthier lives.

Executive Summary

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