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EXECUTIVE SUMMARY

he high rates of childhood obesity in the United States¹ put children's health at risk.

Restaurant foods are the largest category of food marketed to children²₃ and play a critical role in children's diets. More than one half of food expenditures in the United States are spent outside of the home⁴ and children get an average of 25 percent of their calories from restaurant foods and beverages.⁵

While both food and beverage offerings on children's menus impact children's health, this report focuses on beverages on children's menus at the top 50 chain restaurants in the United States. Sugary beverages contribute to the obesity epidemic and are a top source of calories in children's diets^{6,7} and do not typically provide any positive nutritional value.

The Center for Science in the Public Interest previously analyzed the nutritional quality of children's meals at the top restaurant chains in 2008 and 2012.^{8,9} Here, we examine how the beverage offerings have changed over the last eight years.

Of the top 50 chain restaurant chains, 38 had designated children's menus that included beverages. Of those, 74 percent included sugary drinks (soda, lemonade, sugar sweetened juice drinks, and other beverages with added sugars) on their kids' menus, 65 percent included juice (50 percent or higher real juice without added sugars), 69 percent offered low-fat milk (fat free and 1%, including flavored milk), 40 percent high-fat milk (2% and whole milk, including flavored milk), and 13 percent bottled water or seltzer.

Overall, the mix of beverages available on restaurant children's menus has improved over the last eight years. The availability of sugary drinks on children's menus decreased from 93 percent of top chains with children's menus in 2008, to 83 percent in 2012, to 74 percent in 2016 (see Figure 1).

Sugary beverages contribute to the obesity epidemic and are a top source of calories in children's diets^{6,7} and do not typically provide any positive nutritional value.

The availability of high-fat milk on children's menus at the top chain restaurants also decreased from 50 percent in 2008, to 42 percent in 2012, to 40 percent in 2016, while the availability of low-fat milk increased from 36 percent of children's menus in 2008 to 40 percent in 2012 to 69 percent in 2016. Bottled water was not available in 2008. It was available on 2 percent of children's menus in 2012, and 13 percent of children's menus in 2016.

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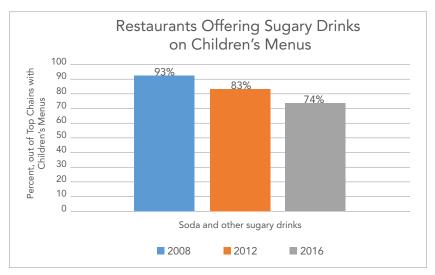


Figure 1. Percentage of Top Restaurants Offering Sugary Drinks on Children's Menus

beverage offerings to children, and thus children's health, more restaurants should remove sugary drinks from children's menus, including soda, lemonade, and other fruit-flavored sugary drinks.

To further improve beverage offerings to children, and thus children's health, more restaurants should remove sugary drinks from children's menus, including soda, lemonade, and other fruit-flavored sugary drinks. Restaurants should:

- Change default beverages to healthy options for children's meals, ¹⁰
- Ensure that all beverages—and foods—on the children's menu meet the National Restaurant Association's nutrition guidelines through its Kids LiveWell program, ¹¹ and participate in the program; and
- Only advertise and market to children if all of the beverages and foods included on the children's menu are healthy through all marketing approaches including, television, websites, in-store promotions, toy giveaways, and school-based marketing.¹²

Introduction

Americans eat out more today than 50 years ago, with half (50.1 percent) of food expenditures spent away from home (restaurants, cafeterias, vending machines, entertainment venues, etc.) in 2014, up from 26 percent in 1970 (see Figure 2). 4.13 Many restaurants offer menu items especially for, and marketed to, children. Given that in 2011–2012, 34.3 percent of U.S. children and adolescents consumed fast food on a given day, 14.15 and children eat almost twice as many calories from a typical restaurant meal compared to a typical meal from home, 16 assessing restaurant food and beverage options is of nutritional importance.

Eating out by children is associated with higher consumption of calories, sugary drinks, saturated fat, and total sugars and with lower intakes of fruits, vegetables, and whole grains. ^{17,18} Eating fast

food is associated with children eating 126 more calories a day, while eating at a full-service restaurant increases children's calorie intake by 160 calories a day on average. The Fast-food and full-service restaurant meal combinations are both associated with increased calorie intake for children. The Fast-food are calorie intake for children.

Children's meals are a form of food marketing to children²⁰, and restaurant foods are the top food category marketed to children.^{2,3} Familiarity leads to preference²¹ and children's meals expose children to specific foods which creates a continued preference for them. In addition, bundling beverages into children's meals may affect the number of children who get a caloric beverage, as families may stick with the default (to get a beverage) and to get their money's worth (part of the price paid and value of the meal includes the beverage).²² Children's meals are also marketed directly to children via in-store promotions, toy giveaways, television, websites, and school-based marketing.³ Companies also use discount pricing to market children's meals.

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Beverages, including soda and other sugary drinks, are often included with children's meals or on children's menus. Yet, sugary drinks are a top source of calories in children's diets^{6,7} and provide half of added sugars in Americans' diets.⁶ Sugary drinks contribute to overweight and obesity, heart disease, type 2 diabetes, and dental disease.^{7,23}

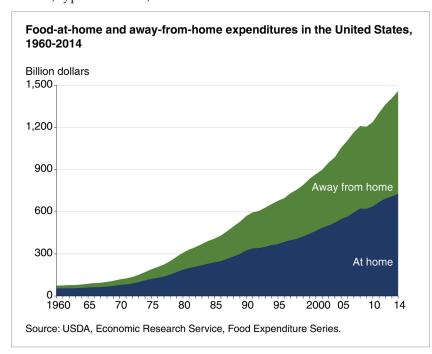


Figure 2. Food-At-Home and Away-From-Home Expenditures in the United States, 1960–2014

In 2013, McDonald's became the first major restaurant company to announce it would remove sugary drinks from its children's menu.24 Since then, Wendy's, Burger King, Dairy Queen, Applebee's, and Jack in the Box have also committed to removing sugary drinks from their children's menus. 25-29 Given these developments, we assessed the overall progress of restaurants in improving beverages promoted to children via children's menus.

Healthier children's meals—with beverage offerings such as water, seltzer, and low-fat milk support families' efforts

to feed their children well and help children form healthy eating habits. This report investigated the beverage offerings on the children's menus at the top 50 chain restaurants in 2016. It also assessed

Children's meals are a form of food marketing to children,²⁰ and restaurant foods are the top food category marketed to children.^{2,3} the changes in beverage offerings to children over time by comparing the results to our previous studies in 2008 and 2012. 8.9 The results can be used by parents, health professionals, and policy makers to understand the current state of beverage offerings promoted to children by chain restaurants and consider options for improving restaurant food environments for children.

Methods

In May and June 2016, we examined beverage offerings found on the children's sections of menus at the 50 largest (according to 2015 United States ³⁰ We compared the results of this study to two previous

sales data) restaurants in the United States.³⁰ We compared the results of this study to two previous studies (in 2008 and 2012) conducted using the same methods described below.^{8,9}

The first step was to determine if the chain offered children's meals or menus. Of the top 50 restaurants and other food service establishments, 11 did not have dedicated children's menu items or meals: Taco Bell, Dunkin' Donuts, Pizza Hut, Domino's, Little Caesars Pizza, Papa John's Pizza, 7-Eleven, Jimmy John's Gourmet Sandwiches, Golden Corral, Wawa, and Five Guys Burgers and Fries. The remaining restaurant chains included beverages either bundled in children's meal combinations (where the beverage was included as a part of the meal) or a la carte (where there was an additional charge for the beverage). One restaurant, Panera, had children's meals, but did not offer children's beverages, and was not included in the analysis. Starbucks was the only restaurant chain that had beverage options for children but no child-targeted food options. Thus, the final sample size for children's menu beverages analyzed for this report was 38. The sample size of restaurants with children's menu beverages was 36 in 2008, and 41 in 2012. We performed a Pearson chi-square test on the data from 2008 and 2016, except for water, for which a Fisher exact test was performed.

We characterized the beverage offerings by type. The categories were: low-fat milk (fat-free or 1% milk, including flavored milk), high-fat milk (2% or whole milk, including flavored milk), juice (50 percent or higher juice, without added caloric sweeteners), bottled water or seltzer (without added caloric sweeteners), and sugary drinks (soda, lemonade, sugar-sweetened juice drinks, sports drinks, coffee/tea with added caloric sweetener, or other beverages with added sugars). We

categorized restaurants as specifically offering water or seltzer when they listed water or seltzer as menu options (rather than just making tap or filtered water available upon request). In general, restaurants that offered full-calorie soda also offered diet soda. We did not characterize diet soda as either healthy or unhealthy since diet drinks can play a positive role in reducing calories,³¹ yet often contain artificial sweeteners of questionable safety.³² Also, because the ingredients were not clear for many drinks at Starbucks and we could not determine the amount of milk in them, several of their beverage offerings were categorized as sugary drinks, rather than milk.

We analyzed menus on each restaurant's website (n = 18) and, when not available, called the restaurant's customer relations (n=3). If neither method yielded the needed information, we placed orders through the restaurants' websites using five different locations across the country (n=3) or called five U.S. locations to ask what beverages were listed

Healthier children's meals—with beverage offerings such as water, seltzer, and lowfat milk—support families' efforts to feed their children well and help children form healthy eating habits.

on their children's menus or menu boards (n=14). Five outlets were assessed to determine if there were regional variations among outlets of the chain. Restaurants that had variations in one or more beverage category between locations included Olive Garden, IHOP, Outback Steakhouse, Popeyes Louisiana Kitchen, Hardee's, TGI Fridays, Carl's Jr., Red Robin Gourmet Burgers and Brews, and Steak and Shake. For those chains where the beverage options were inconsistent (fewer than 80 percent of restaurant outlets we called offered or did not offer a particular beverage option), that chain was not included in the analysis for that beverage category. For example, we called five Red Robin locations, and they offered high-fat milk in some locations and low-fat milk in others, so we did not include Red Robin in the analysis of the types of milk offered.

Results

Of the 38 top restaurant chains that had beverages on children's menus, 32 bundled the beverage as part of children's meals, including it in the price of the meal; five sold the beverages on the children's menu a la carte; and one restaurant, Starbucks, offered child sized beverages but not child-specific food items.

Many Top Restaurant Chains Continue to Offer an Unhealthy Mix of Beverages to Children

Of the 38 top restaurant chains that have children's menus that included beverages, 74 percent offered sugary drinks (see Table 1). Forty percent offered high-fat milk, 69 percent offered low-fat milk, 65 percent offered juice, 13 percent offered bottled water or seltzer, and 59 percent offered diet soda or other diet drinks (see Figure 3).

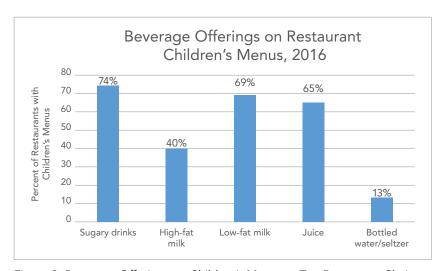


Figure 3. Beverage Offerings on Children's Menus at Top Restaurant Chains, 2016

Chains without Sugary Beverages on Children's Menu	Chains with Sugary Beverages on Children's Menu
McDonald's (1)	Starbucks (2)
Subway (3)	Chick-fil-A (8)*
Burger King (4)*	KFC (12)
Wendy's (5)*	Chipotle Mexican Grill (14)
Applebee's (10)*	Sonic Drive-In (15)*
Panera Bread (11)**	Olive Garden (16)
Dairy Queen (20)*	Chili's Grill & Bar (17)*
Jack in the Box (21)	Buffalo Wild Wings (19)
IHOP (23)*	Arby's (22)*
Longhorn Steakhouse (39)	Denny's (25)*
	Outback Steakhouse (26)*
	Popeyes Louisiana Kitchen (27)
	Red Lobster (28)
	Panda Express (29)
	Cracker Barrel Old Country Store (30)
	Hardee's (32)
	Texas Roadhouse (33)
	Whataburger (34)
	The Cheesecake Factory (35)
	TGI Fridays (36)
	Carl's Jr. (40)
	Red Robin Gourmet Burgers and Brews (41)*
	Zaxby's (42)
	Ruby Tuesday (45)
	Waffle House (46)
	Culver's (47)
	Bojangles' Famous Chicken 'n Biscuits (48)
	Bob Evans (49)*
	Steak 'n Shake (50)
*Indicates restaurant chain is a member of the National Restaurant Association's Kids LiveWell	

^{*}Indicates restaurant chain is a member of the National Restaurant Association's Kids LiveWell program. $^{\rm 33}$

Table 1. Top 50 Restaurant Chains with Children's Menu Categorized by Offerings, 2016 (Rank by Sales)

We also tallied the number of outlets for each of the 38 restaurant chains that have beverages on their children's menus. Out of a total of 112,201 locations, 57 percent (64,382 outlets) belong to chains that do not offer sugary beverages on their children's menus. While 26 percent of the chains (nine of the 38) have agreed to remove sugary beverages from their children's menus, more than half of restaurant outlets among the top chains have children's menus free of sugary drinks. Some of the chains that have pledged to remove sugary drinks from their children's menus are large chains, including McDonald's (14,350 outlets), Subway (26,530 outlets), Burger King (7,129 outlets), and Wendy's (5,750 outlets). Wendy's (5,750 outlets).

^{**}Panera's children's menu does not include beverages.

ⁱ The top 50 restaurants in this study were ranked by revenue not number of outlets or meals served.

The proportion of restaurants with sugary drinks on their children's menus has declined significantly since 2008 (p<0.05) (see Figure 4). In 2008, 93 percent of the top restaurants with children's menus offered sugary drinks compared to 74 percent in 2016.

Progress on Children's Meal Beverages, 2008-2016

The proportion of restaurants with sugary drinks on their children's menus has declined significantly since 2008 (p<0.05)(see Figure 4). In 2008, 93 percent of the top restaurants with children's menus offered sugary drinks compared to 74 percent in 2016. Low-fat milk was offered at significantly more restaurants between 2008 and 2016 (p<0.05); 36 percent in 2008, and 69 percent in 2016. While not statistically significant, high-fat milk offerings trended downward, from 50 percent in 2008 to 40 percent in 2016, and juice offerings increased from 54 percent in 2008 to 65 percent in 2016. In 2008, bottled water was not on the children's menu at any of the top 50 restaurants, but was offered on 13 percent of menus in 2016 (not statistically significant).

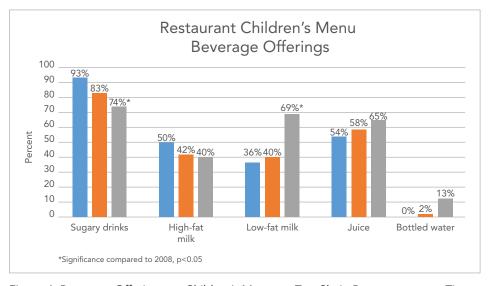


Figure 4. Beverage Offerings on Children's Menus at Top Chain Restaurants over Time

Discussion and Recommendations

Since 2008, when we first assessed the beverages available on children's menus, the restaurant industry has made progress. The percentage of the top 50 restaurants with sugary drinks on the children's menu steadily decreased between 2008 and 2016. However, there is still work to be done. The majority of the top chain restaurants—where millions of children eat every day—still offer sugary drinks on children's menus.

ii Our 2012 report concluded that 78 percent of restaurants with children's menus offered soda. Two restaurants at that time offered lemonade but not soda. When those sugary drinks are included, the percentage of restaurants with sugary drinks on their kids' menu in 2012 rises to 83 percent.

Since our 2012 study, McDonald's, Wendy's, Burger King, Dairy Queen, Applebee's, IHOP, and Jack in the Box have all committed to removing soda and other sugary drinks from their children's menus. They join Subway, which never offered sugary beverages on its children's menu, and Panera, which does not bundle any drinks with children's meals. We also found that LongHorn Steakhouse now has a children's menu free from sugary beverages; it offered soda in 2012.

The progress on children's menu beverages may, in part, be attributable to passage of local policies and to the work of organizations advocating for children's meal improvements. In 2010, San Francisco³⁵ and Santa Clara County,³⁶ California passed healthier children's meals laws, which set nutrition standards for meals that are sold with toys, including that those meals do not include sugary beverages. Additionally, since 2012, Stockton,³⁷ Davis,³⁸ and Perris,³⁹ California have passed laws requiring that restaurants in their communities offer only healthier beverages as the defaults with children's meals.

Advocacy groups have supported legislation, such as the local ordinances listed above, and have also urged restaurants to make improvements to restaurant children's meals. Several organizations, joined by parents, health professionals, and progressive stockholders, have asked restaurants for

changes through petitions, emails, letters, in-person meetings, and shareholder actions.

However, restaurants need to make further improvements to children's menu offerings. More

restaurants should remove sugary drinks from children's menus, including soda, lemonade, and other sugary fruit-flavored drinks. The commitments made to date by more than a half dozen large restaurant chains show that this is feasible. Restaurants also should improve their children's menus through the following actions:

1. Change default beverages to healthy options for children's meals.¹⁰

Defaults are the option people automatically receive if they do not choose something else. Evidence from a wide range of fields (including retirement plans, organ donation, health care, and food/nutrition) shows that people tend to stick with defaults and that setting beneficial defaults has high rates of acceptability.²²

The commitments made to date by more than a half dozen large restaurant chains show that removing sugary drinks from children's menus is feasible.

According to an independent verification firm, "McDonald's USA sold 21 million more low-fat and fat-free milk jugs and 100% apple juice boxes in the first 11 months in Happy Meals and a la carte after removing the listing of sodas on the Happy Meal section of menu boards compared to the same period a year earlier (July 2014 to May 2015)."⁴⁰ Another study found that when McDonald's changed the default sides for its children's meals by reducing the size of the fries and adding apple slices automatically, the calories in the average children's meal purchased decreased by 19 percent.⁴¹

Sales of healthier entrées, fruit and vegetable sides, and milk increased and sales of french fries and soda decreased after a regional chain restaurant implemented a healthier children's menu.⁴² Children's meals with healthier defaults at Walt Disney theme parks resulted

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in 19 percent fewer calories compared to meals with unhealthy defaults.⁴³ Parents stuck with healthy side dishes 48 percent of the time and healthier beverages 66 percent of the time, even though trips to theme parks are typically special occasions and more indulgent options were available.⁴³ Changing the defaults from unhealthy options to healthier ones support healthy eating by children.

2. Ensure that all items on children's menus meet the National Restaurant Association's Kids LiveWell program nutrition guidelines, and participate in the program.

The National Restaurant Association manages the Kids LiveWell program, ¹¹ which requires participating restaurants to offer at least one children's meal and one other individual item that meet the program standards, display or make available upon request the nutrition profile of the healthier menu options, and promote and identify the Kids LiveWell menu options. Currently, no qualifying Kids LiveWell meals include sugary beverages. However, a number of restaurants that belong to Kids LiveWell continue to list sugary drinks on their children's menu, including Chick-fil-A, Sonic Drive-In, Chili's Grill and Bar, and Arby's (see Table 1).

The results of this study show that the Kids LiveWell program, as currently run, does not prevent participating restaurants from promoting sugary drinks to children. The Kids LiveWell nutrition standards should instead be applicable to all the meals and menu options, including beverages, on children's menus, instead of only applying to one meal and item. Although some of the top 50 restaurants already participate in this program, we recommend that more restaurants join the Kids LiveWell program as a step towards improving their offerings for children.

3. Only advertise and market to children if all of the beverages and foods included on the children's menu are healthy through all marketing approaches including, television, websites, in-store promotions, toy giveaways, and school-based marketing.

Many restaurant advertisements focus on the kids' meal brand generally (e.g., Happy Meals), rather than specific menu items⁴⁴ making the ads thematic brand ads, rather than a clear promotion of a specific meal or menu item. McDonald's for example, commits to highlight healthier meals in its advertisements to children, but children viewing these ads only recall the promotional theme or tie in, not the meal.⁴⁵ For this reason, a restaurant should only market to children if all of the items on the children's menu meet nutrition standards.¹²

Children's meals are marketing in and of themselves. Labeling meals as "kids' meals" and including specific food and beverage formulations and combinations help to set norms and cultivate habits in children. Studies show that repeated exposure to fast food and soda, through advertising, marketing, and consumption, cultivates a pattern for future consumption and a preference for those and similar foods. 46 Preschool-aged children recognize and prefer fast-food and soda brands that are extensively marketed to them. 46 Restaurant foods are the top category of food marketed to children and many meals are marketed specifically to children via in-store promotions, toy giveaways, television, websites, and school-based marketing. 23 Food and beverage marketing influences children's food preferences, food choices, diets, and health. 47

Increasingly, parents and caregivers are relying on restaurants to feed themselves and their families. While restaurants have made some progress improving children's menus, progress has been too modest and slow. Restaurants should do more to support healthy eating by children and parents' efforts to feed children well.

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