



Fast Food f.a.c.t.s.

Food Advertising to Children and Teens Score

2013



Measuring Progress in Nutrition and Marketing to Children and Teens



YALE RUDD CENTER
FOR FOOD POLICY & OBESITY

BACKGROUND

In 2010, researchers at the Yale Rudd Center for Food Policy & Obesity issued Fast Food FACTS.¹ The report examined the nutritional quality of fast food menus, advertising on TV and the internet, and marketing practices inside restaurants.

Since 2010, fast food restaurants have introduced healthier kids' meal options and regular menu items. At the same time, they have introduced high-calorie, nutritionally poor menu items, often supported by sophisticated marketing campaigns.

Objective and transparent data are necessary to evaluate restaurants' progress in addressing the harmful effects of fast food consumption on the diets of young people. Three years after our first report – using the same methods as the original Fast Food FACTS – this report quantifies changes in the nutritional quality of fast food and how it is marketed to children and teens.

FAST FOOD CONSUMED BY CHILDREN AND TEENS

- Every day, 33% of children and 41% of teens consume fast food.²
- Most children *do not* consume kids' meals when they visit fast food restaurants. At burger restaurants, only 44% of children under 6 and 31% of older children receive a kids' meal.³
- Since 2007, visits to fast food restaurants that included a kids' meal purchase have declined,⁴ with a 5% drop from 2010 to 2011.⁵
- On days they eat fast food, children consume 126 additional calories and teens consume 310 more calories. Intake of sugary drinks, total sugar, saturated fat, and sodium also increases.⁶



NUTRITION*

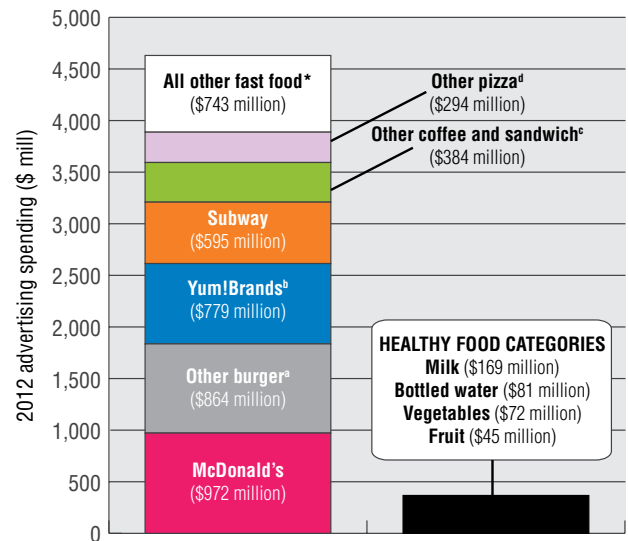
The nutritional quality of individual items offered with kids' meals improved.

- Most restaurants offered at least one healthy side option and three-quarters increased healthy beverage options.
- McDonald's changed Happy Meal sides to automatically include half-portions of french fries and apples.

But less than 1% of all kids' meal combinations – 33 out of 5,427 possible meals – met recommended nutrition standards.⁷

- The number of possible kids' meal combinations increased 54%, but there was no change in the percent of combinations that qualified as healthy meals for children.⁷
- Only Subway, Burger King, Taco Bell, Arby's, and Jack in the Box offered main dish options that were not too high in calories, sodium, or saturated fat.

Fast food restaurants spent 12.4 times as much to advertise their products compared with all advertisers for four healthy food categories combined.



Source: Nielsen (2012)

Fast Food FACTS 2013 analyzes 18 restaurants:

McDonald's	Burger King ^a	Little Caesars ^d
Subway	Domino's ^d	Dairy Queen ^a
Taco Bell ^b	Sonic ^a	Starbucks ^c
Wendy's ^a	Arby's ^c	Panera Bread ^c
KFC ^b	Dunkin' Donuts ^c	Chick-fil-A ^c
Pizza Hut ^b	Jack in the Box ^a	Cici's Pizza ^d

^{*}266 different fast food restaurants advertised in 2012



- Only 3% of kids' meal combinations met the food industry's own revised CFBAI nutrition standards⁸ or the National Restaurant Association's Kids LiveWell standards.⁹

The number of regular menu items offered also increased dramatically, but the proportion of healthy versus unhealthy menu items remained the same.

- Menu items offered by McDonald's, Subway, Burger King, and Taco Bell increased 35%.
- Less than one-quarter of restaurants' regular menu items qualified as nutritious options for teens.
- Restaurants continued to offer large or extra-large soft drinks (350-850 calories) and large french fries (470-610 calories).

^{*}Nutrition data were collected in February 2013.

MARKETING TO CHILDREN AND TEENS*

Older children's total exposure to fast food TV and internet advertising declined.

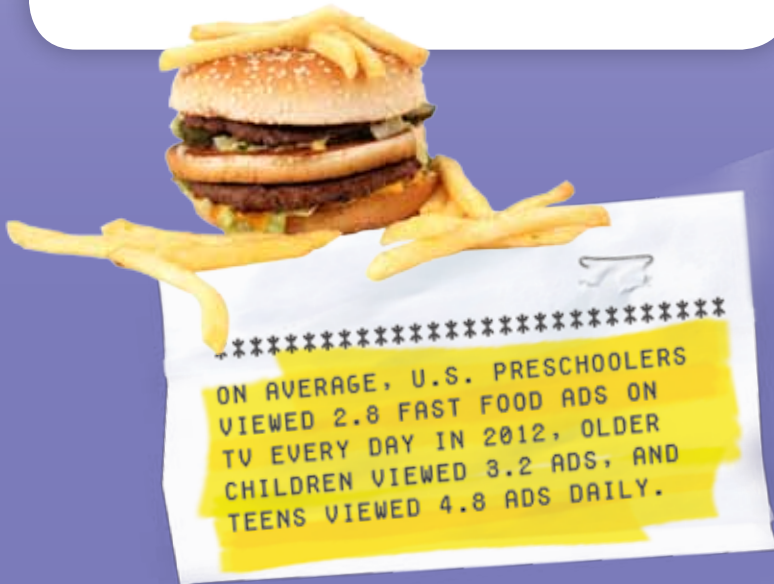
- TV advertising viewed by children ages 6 to 11 declined by 10%. McDonald's and Burger King reduced TV advertising to children by 13% and 50%, respectively.
- Popular child-targeted websites from McDonald's, Burger King, and Dairy Queen were discontinued.
- HappyMeal.com was the only child-targeted website with over 100,000 monthly unique child visitors in 2012, compared with four sites in 2009.

Most fast food restaurants stepped up advertising to children, and preschoolers' exposure to TV advertising did not change.

- Three-fifths of fast food restaurants increased TV advertising to older children. Domino's and Wendy's advertising went up 44% and 13%, respectively.
- McDonald's continued to advertise more to children than to teens or adults on TV – the only restaurant to do so.
- McDonald's display ads for Happy Meals increased 63% to 31 million ads monthly. Three-quarters appeared on kids' websites, such as Nick.com, Roblox.com, and CartoonNetwork.com.
- Child-targeted advergames (i.e., branded games) have gone mobile with McDonald's "McPlay" and Wendy's "Pet Play Games" mobile apps.

Just one-quarter of fast food ads viewed by children on TV were for kids' meals.

- McDonald's Happy Meals were advertised most frequently, followed by Domino's pizza, Subway sandwiches, Wendy's lunch/dinner items, and Pizza Hut pizza.
- Subway placed ads with a primary focus on the brand (not the food) on children's networks, and Burger King ads focused primarily on child-targeted promotions.
- Wendy's and Subway advertised Frostys, Baconator burgers, and Footlong sandwiches on children's TV, including Nickelodeon and Cartoon Network.
- McDonald's advertised Filet-o-fish sandwiches and other regular menu items on kids' websites, including Nick.com and Roblox.com.



There were some positive trends in fast food marketing to teens.

- The number of TV ads viewed by teens did not change, but average calories per ad viewed declined by 16%. Percent of calories from sugar and saturated fat also went down.
- Display ads on youth websites declined by more than half, from 470 million monthly ad views per month in 2009 to 210 million in 2012.

Restaurants continued to target teens with TV and internet advertising for primarily unhealthy products.

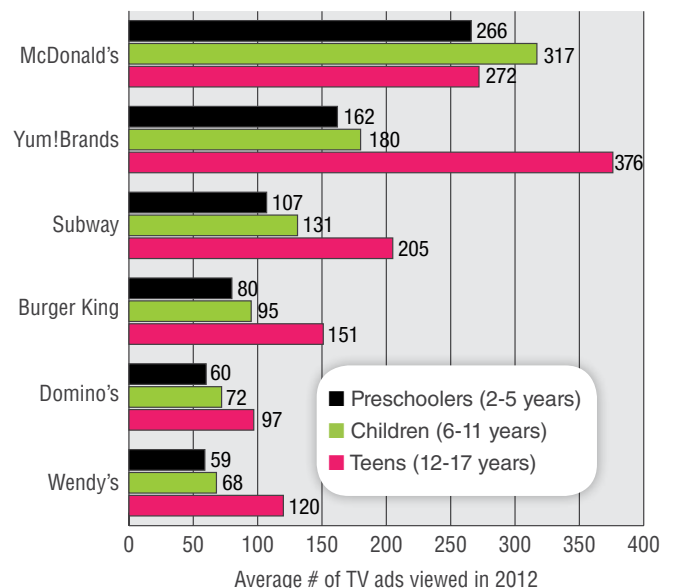
- Teens were more likely to see more TV ads for Taco Bell, Sonic, and Starbucks compared with adults.
- Burger King Smoothies were the only nutritious regular menu item frequently advertised to teens.
- KFC, Subway, and Starbucks more than doubled display advertising on youth websites. Teen visitors to Subway.com, Starbucks.com, and McDonalds.com increased by 75% or more.
- PizzaHut.com, McDonalds.com, and Dominos.com averaged 270,000 or more unique teen visitors per month.

Fast food marketing via mobile devices and social media popular with teens has grown exponentially.

- Six billion fast food ads appeared on Facebook – 19% of all fast food display advertising – including more than half of Dunkin' Donuts' and Wendy's ads.
- Starbucks, McDonald's, and Subway rank in the top-12 of all brands on Facebook, with 23+ million Facebook likes. They are also popular on Twitter with 1.4+ million followers.
- Taco Bell's YouTube videos were viewed nearly 14 million times.
- Smartphone apps offer interactive features such as order functions and special offers. Papa John's and Pizza Hut mobile pizza ordering apps averaged 700,000+ monthly unique visitors.

*Most marketing analyses examine changes from 2009 to 2012.

Six companies were responsible for over 70% of fast food TV ads viewed by children and teens.



Source: Nielsen (2012)

TARGETED MARKETING

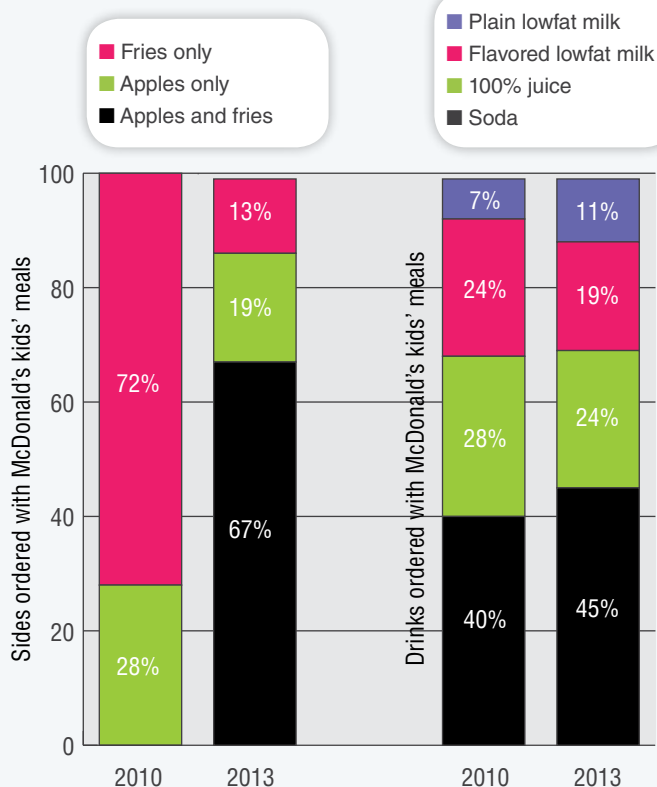
Fast food restaurants continued to target black and Hispanic youth, who face higher risk for obesity and related diseases.

- Advertising spending on Spanish-language TV increased 8%. KFC and Burger King increased their spending by 35% or more while reducing English-language advertising.
- Hispanic preschoolers viewed almost one fast food ad on Spanish-language TV every day, a 16% increase over three years earlier. Hispanic preschoolers saw 100 more ads than did older Hispanic children or teens.
- Just 5% of Spanish-language ads viewed by Hispanic children promoted kids' meals.
- Black children and teens continued to see approximately 60% more fast food ads than white youth. Starbucks, Popeyes, and Papa John's placed advertising during programming watched relatively more often by black youth.
- Black and Hispanic youth were more likely than other youth to visit one-third or more of all fast food websites. Hispanic youth were 30% more likely to visit HappyMeal.com, and black youth were 44% more likely to visit the site.

HEALTHY SIDES AND DRINKS IN KIDS' MEALS

With McDonald's new apples and french fries default side options, the proportion of children getting apples has increased three-fold.

There were no significant changes in healthy beverages ordered.



Source: Survey of 449 parents who took their 2- to 11-year-old child to McDonald's in the past week (July 2013).¹¹



RECOMMENDATIONS

Over the last three years, there have been some improvements. However, the pace is slow and unlikely to reduce young people's overconsumption of high-calorie, nutritionally poor fast food.

Fast food restaurants should do more to improve the nutritional quality of kids' meals and regular menu items.

- Apply industry standards for healthy kids' meals to the majority of kids' meal combinations available for purchase – not a mere 3%.
- Automatically provide healthy sides and beverages as the defaults in kids' meals.
- Increase the proportion of lower-calorie, healthy items on regular menus and make them available at a reasonable price.

Fast food restaurants should stop marketing directly to children and teens to encourage consumption of unhealthy fast food.

- Limit advertising on children's TV networks and third-party kids' websites to healthy kids' meals only.
- Stop unfair marketing targeted to children, including ads that focus on promotions, not food; mobile advergame apps; and online ads that link to advergame sites.
- Ensure that preschoolers are not exposed to fast food advertising, especially advertising on Spanish-language TV.
- Stop targeting middle school children (ages 12-14) with marketing for unhealthy fast food that can damage their health.
- Establish age limits on marketing to youth via social media and mobile devices, marketing that takes advantage of their susceptibility to peer influence and impulsive actions.

¹ www.fastfoodmarketing.org. ² Powell LM, Nguyen BT & Han E (2012). *American Journal of Preventive Medicine*. ³ The NPD Group/Crest©/1 Year Ending December 2012. ⁴ York EB (2012, Apr 10). *Articles.chicagotribune.com*. ⁵ The NPD Group/Crest©/1 Year Ending December 2012. ⁶ Powell LM & Nguyen BT (2013). *JAMA Pediatrics*. ⁷ Criteria based on the Institute of Medicine standards for maximum calories and sodium in school meals and a nutritional profile index to measure overall product nutrition based on regulations for food advertising to children in the United Kingdom. See fastfoodmarketing.org/methods for a detailed description. ⁸ www.bbb.org/us/childrens-food-and-beverage-advertising-initiative/ ⁹ www.restaurant.org/Industry-Impact/Food-Healthy-Living/Kids-LiveWell-Program ¹⁰ Grier SA & Kumanyika S (2010). *Annual Review of Public Health*. ¹¹ Schwartz MB (2013). Paper presentation at the American Public Health Association Annual Meeting, Boston, MA. www.fastfoodmarketing.org. ¹² Burnett S, Sebastian C, Kadosh KC & Blakemore SJ (2011). *Neuroscience and Biobehavioral Reviews*; Albert D, Chain J & Steinberg L (2013). *Current Directions in Psychological Science*.

Support for this research was provided by a grant from the Robert Wood Johnson Foundation.