

Soda *Still* on the Menu:

Progress, but More to Do to Get Soda
off Restaurant Children's Menus



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Acknowledgments

Peter Lurie, Julia McCarthy, Andrea McGowan, Laura MacCleery, Darya Minovi, and Jillian Morgan provided valuable suggestions and review of the report, for which we are grateful.

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July 2019

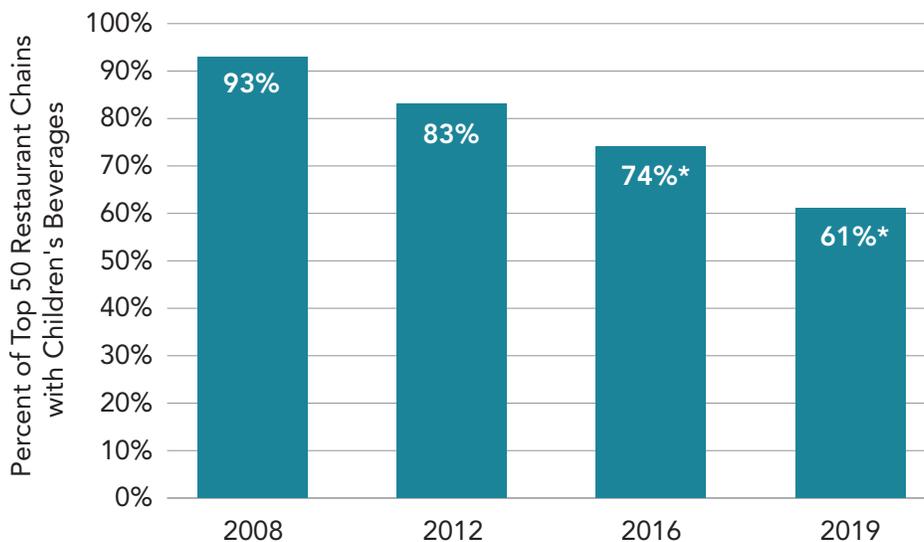
Executive Summary

Americans are eating out more frequently than in the past. Half of all food expenditures are now for restaurant and other away-from-home food.¹ Eating out has nutrition and health consequences for adults, but children are especially vulnerable. When children eat out, they typically consume more calories, added sugars, and sugary drinks and fewer fruits, vegetables, and whole grains than when they eat at home.² Children get a quarter of their calories, on average, from restaurant food and beverages.³

The Center for Science in the Public Interest previously analyzed the nutritional quality of children’s meals at the top 50 restaurant chains in 2008,⁴ 2012,⁵ and 2016.⁶ In this report, we examine how the children’s menu beverage offerings at the top 50 restaurant chains have changed over the last decade.

The availability of sugary beverages like soda, lemonade, sweetened fruit-flavored drinks, and other beverages with added sugars on children’s menus at the top 50 chains decreased from 93 percent in 2008, to 83 percent in 2012, to 74 percent in 2016,⁷ to 61 percent in 2019.

Figure 1: Top 50 Restaurant Chains Offering Sugary Drinks on Children’s Menus



* significance compared to 2008 using chi-square test, $p < 0.05$

Eating out has nutrition and health consequences for adults, but children are especially vulnerable. When children eat out, they typically consume more calories, added sugars, and sugary drinks and fewer fruits, vegetables, and whole grains than when they eat at home.²

This report also expands upon those previous studies to include the top 200 restaurant chains (ranked by revenue), giving a broader assessment of the restaurant landscape. Of the top 200 restaurant chains, 135 had designated children's menus that included beverages. Of those, 83 percent included soda and other sugary drinks on their kids' menus, 72 percent included juice (100% juice or juice diluted with water with no added sweetener), 43 percent offered low-fat milk (fat free or 1%, including flavored milk), 43 percent had high-fat milk (2% or whole milk, including flavored milk), and 9 percent included bottled water or seltzer.



Denny's makes their soda, fruit punch, and other drink offerings more appealing to children using bacon and sausage characters on its Grand Slam Cups.

We found greater progress in providing healthier default beverages to children by larger chains. Sixty-one percent of the top 50 chains had sugary drinks on the children's menu, compared to 92 percent of restaurant chains ranking from 51 to 200 having sugary drinks on the children's menu. The progress is greatest among the top 10 restaurant chains; only 2 of the top 10 chains listed sugary drinks on the children's menu compared to 84 percent (108 of 128) of the restaurant chains ranked from 11 to 200.

There has been steady progress in the reduction of sugary drinks on the menu at the top 50 chain restaurants over the last decade. These improvements are the result of hard work by advocates, email-writing campaigns and social media engagement by parents and supporters of children's health, shareholders' actions, and media campaigns that have resulted in voluntary commitments from restaurants and the beverage industry (Table 1). Additionally, since 2010, advocates have worked with policymakers to pass almost 20 state and local healthy kids' meal policies.⁸

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It is time for all restaurants, with the support of the National Restaurant Association, The Coca-Cola Company, PepsiCo, and the American Beverage Association, to remove soda, lemonade, and all sugary drinks from children's menus. Given that more than 80 percent of the top 200 restaurant chains still have sugary drinks on children's menus, states and localities should pass healthy kids' meal policies. 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 healthier eating habits. While there has been progress, there is still much more to do to get soda and other sugary beverages off restaurant children's menus.

Table 1: Top 200 Restaurant Chains with and without Sugary Drinks on the Children's Menu

Top 200 Restaurant Chains (Ranked by Revenue ⁹) with Children's Meals			
No Sugary Drinks on Children's Menu	Sugary Drinks ¹ on Children's Menu		
McDonald's (1)	Starbucks (2)	Perkins Restaurant & Bakery (78)	Fuddruckers (138)
Subway (3)	Chick-fil-A (8)*	Logan's Roadhouse (80)	Bar Louie (139)
Burger King (5)*	Sonic Drive-In (12)*	Boston Market (81)*	Romano's Macaroni Grill (141)
Wendy's (6)*	<i>Applebee's Neighborhood Grill + Bar</i> (14)*	McAlister's Deli (83)	Old Chicago Pizza and Taproom (142)
Panera Bread (12)	Chili's Grill & Bar (22)*	Noodles & Company (85)*	Uno Pizzeria & Grill (143)
KFC (13)~	Cracker Barrel Old Country Store (25)	Captain D's (90)*	Braum's (147)
Olive Garden (15)	Panda Express (26)	Yard House (91)	BRIO Tuscan Grille (148)
Chipotle Mexican Grill (16)	Popeyes Louisiana Kitchen (27)	Long John Silver's (93)	Luby's (150)
Buffalo Wild Wings (17)	Denny's (28)*	O'Charley's (94)	Mimi's Café (153)
Arby's (18)	Outback Steakhouse (29)*	Round Table Pizza (97)	Legal Sea Foods (156)
Dairy Queen (20)*	Texas Roadhouse (32)	Dickey's Barbecue Pit (100)	Huddle House (158)
Jack in the Box (21)	Hardee's (33)	Famous Dave's of America (102)	Fazoli's (160)
IHOP (23)*	Whataburger (34)	Maggiano's Little Italy (103)	Johnny Rockets (161)
Red Lobster (31)~	The Cheesecake Factory (36)	Pollo Tropical (104)	First Watch (163)*
Carl's Jr. (41)	Zaxby's (39)	Corner Bakery Cafe (108)*	Rubio's Coastal Grill (164)
QDOBA Mexican Eats (62)	LongHorn Steakhouse (40)*	Miller's Ale House (109)	Taco Bueno (165)
Sheetz (70)*	Red Robin Gourmet Burgers and Breads (42)*	Joe's Crab Shack (110)	Bubba Gump Shrimp Co. (166)
Jason's Deli (75)	TGI Fridays (44)	Pei Wei Asian Diner (111)	Bahama Breeze (168)
Jamba (86)	Culver's (45)	Taco John's (112)	Hard Rock Cafe (169)*
Potbelly Sandwich Shop (99)	Waffle House (46)	Charleys Philly Steaks (113)	Newk's Eatery (170)
Zoës Kitchen (136)**	Bojangles' Famous Chicken 'n Biscuits (47)	Frisch's Big Boy (114)*	Black Bear Diner (171)
Sonny's BBQ (146)	Steak 'n Shake (48)	On the Border Mexican Grill & Cantina (115)*	Beef 'O' Brady's (172)
A&W Restaurants (167)~	BJ's Restaurant & Brewhouse (49)	Village Inn (118)	The Melting Pot (176)
	Dave & Buster's (50)	Freddy's Frozen Custard & Steakburgers (119)	Penn Station (178)
	Ruby Tuesday (51)	Smashburger (120)	Which Wich (179)
	P.F. Chang's China Bistro (55)	Smoothie King (121)*	Quiznos (180)
	Chuck E. Cheese (56)	Schlotzsky's (122)*	Rainforest Cafe (182)*
	Bob Evans (58)*	Peet's Coffee (123)	Cafe Rio Mexican Grill (183)
	Jersey Mike's Subs (60)	Chuy's (124)	McCormick & Schmick's (184)
	El Pollo Loco (64)*	Taco Cabana (125)	Donatos Pizza (185)
	Del Taco (68)	Tropical Smoothie Cafe (126)	Cooper's Hawk Winery & Restaurants (186)
	Cheddar's Scratch Kitchen (69)	Friendly's (128)*	Bertucci's (189)
	Carrabba's Italian Grill (71)*	Ninety Nine Restaurant & Pub (129)	Smokey Bones Bar & Fire Grill (190)
	Moe's Southwest Grill (72)*	Benihana (130)	Claim Jumper Restaurant & Saloon (193)
	Firehouse Subs (73)	The Habit Burger Grill (131)	Shari's Cafe and Pies (196)*
	California Pizza Kitchen (75)*	Fleming's Prime Steakhouse & Wine Bar (133)	Kona Grill (197)
	Ruth's Chris Steak House (76)	Caribou Coffee Company (134)	
	Raising Cane's (77)	Saltgrass Steak House (135)	

¹ Sugary drinks include soda, lemonade, sweetened fruit-flavored drinks, sweetened coffee drinks, and other beverages with added sugars. It does not include flavored milk.

* Indicates restaurant chain was member of National Restaurant Association's Kids LiveWell Program as of August 2018¹⁰

** Children's menu does not include beverages

~ Improvements to default beverage offerings announced but not yet implemented at time of this study

Bolding indicates that the restaurant chain only offers sugary beverages (and no healthier alternative) on their children's menu.

Italics indicates that some locations had sugary beverages while others did not.

Introduction

Soda, lemonade, fruit-flavored drinks, and other sugary beverages are a top source of calories for children^{11,12} and provide half of added sugars in Americans' diets.¹³ They contribute to overweight and obesity, heart disease, type 2 diabetes, and dental disease.^{14,15,16} For each additional serving of soda or sweetened fruit-flavored beverage a child consumes per day, the child's chance of becoming overweight increases by 44 percent.¹⁷ Replacing sugary drinks with non-caloric beverages results in reduced weight gain and reduced fat accumulation in normal-weight children.¹⁸

Americans eat out more today than 50 years ago, with half of food expenditures spent away from home (restaurants, cafeterias, vending machines, entertainment venues, etc.) in 2014, up from 26 percent in 1970.^{19,20} Children 2 to 19 years old consume, on average, one-quarter of their calories from restaurants and other food-service establishments.²¹ A third of children eat food or beverages from fast-food restaurants and 12 percent from full-service restaurants on a typical day.²² Forty-six percent of parents of children ages 6 to 11 report ordering only a kids' meal (i.e., no additional menu items) for their children at their last visit.²³ The proportion for children under age 6 is higher, at 64 percent.²⁴

Eating out by children is associated with higher consumption of calories, sugary drinks, saturated fat, and total sugars and with lower diet quality compared to meals eaten at home.^{25,26} On the days children eat fast food, they consume 126 more calories a day, on average, while eating at a full-service restaurant is associated with an extra 160 calories a day.²⁷

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Defaults are the options people are given automatically if they do not specifically ask for something else. Evidence from a wide range of fields (including healthcare, retirement savings, organ donation, and food choices) demonstrates that people tend to stick with defaults.²⁸ Providing sugary drinks as a default option is a form of marketing and increases the likelihood of consumption.^{29,30} When a restaurant offers only healthy defaults, a child is more likely to receive a healthier beverage.³¹

Since 2013, several restaurants have voluntarily removed soda, lemonade, and other sugary drinks from their children's menus and almost 20 states and localities have passed healthy kids' meal policies. Given these developments, we assessed the overall progress of chain restaurants in improving beverages promoted to children via kids' menus.

This report investigates the beverage offerings on the children's menus at the top 200 chain restaurants in 2019. It also assesses the changes in beverage offerings to children over time by comparing the results for the top 50 chains to our previous studies in 2008,³² 2012,³³ and 2016.³⁴ The results can be used by parents, health professionals, policy makers, beverage companies, and restaurants to understand the current state of beverage offerings promoted to children by chain restaurants and to consider options for improving restaurant food environments for children.

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Methods

In March and April 2019, we examined beverage offerings on children's menus of the top 200 restaurants, as ranked by 2017 revenue data.³⁵ We used the same methodology as in our 2008,³⁶ 2012,³⁷ and 2016³⁸ studies, and were able to make comparisons over time for the top 50 chains. The purpose of this series of studies was to provide a landscape analysis of top restaurant chains in each given year. There is some variation in which restaurants fall within the top 50, as ranked by revenue, over the years. Forty out of the 50 top restaurant chains in the current study have been ranked in the top 50 restaurants across all four studies.

We analyzed menus on each restaurant's website and, when not available, called restaurants' customer relations departments. If neither method yielded the necessary information, we called five U.S. locations to ask what beverages their children's menus or menu boards listed. We did not include a restaurant chain in our analysis of a beverage category if fewer than four (less than 80 percent) of the five restaurant outlets we called differed in whether they offered a particular beverage option. For example, we called five Chili's Grill & Bar locations, and two offered low-fat milk and three did not, so we did not include Chili's Bar & Grill in the analysis of low-fat milk. Many of the customer relations calls and restaurant-specific calls took place in June and July 2018.

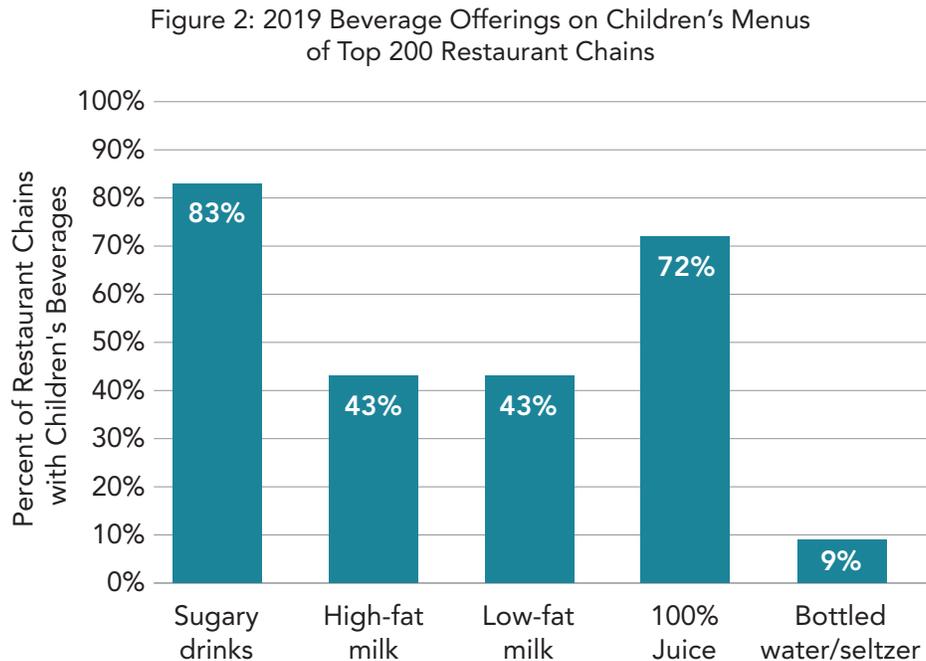
Of the top 200 restaurant chains, 135 had beverage offerings specifically for children. Of those, 129 had beverages that were part of a larger children's menu that included food. Of the restaurants with children's beverages (n=135), 85 percent (n=114) bundled them as a part of children's meals, 10 percent (n=14) offered children's beverage options a la carte, 4 percent (n=5; Starbucks, Jamba, Smoothie King, Caribou Coffee Company, and Chuck E. Cheese) served child-sized drinks without child-specific food, and 1 percent varied by location (n=1; McCormick & Schmick's either served them bundled or a la carte, depending on location). We did not include locations that offered child-specific foods without child-specific beverages (e.g. Zoës Kitchen) in our analysis.

We characterized beverage offerings by type: low-fat milk (fat-free or 1%, including flavored milk); high-fat milk (2% or whole milk, including flavored milk); juice (100% juice or juice diluted with water with no added sweetener); bottled water or seltzer (with no

added caloric sweetener); and sugary drinks (soda, lemonade, sugar-sweetened fruit-flavored drinks, sports drinks, coffee and tea with added caloric sweetener, and other beverages with added sugars).ⁱ We did not characterize diet soda as either healthy or unhealthy since diet drinks can play a positive role in reducing calories,³⁹ yet often contain artificial sweeteners of questionable safety.⁴⁰

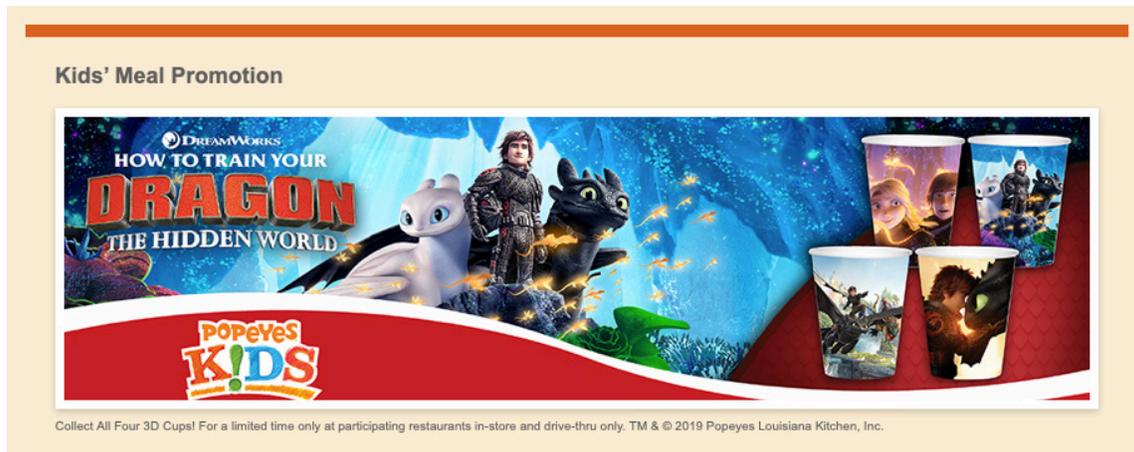
Results

Current state of children’s meal beverages: In 2019, 135 of the top 200 restaurant chains (ranked by revenue) had children’s meals or children’s beverages. Eighty-three percent of those 135 chains offered sugary drinks on the children’s menu. Forty-three percent included high-fat milk, 43 percent offered low-fat milk, 72 percent included juice, and 9 percent included bottled water or seltzer (Figure 2).



ⁱ Since we could not determine the amount of milk in the kids’ beverages at Starbucks, the milkfat percentage is at the customer’s discretion, and whipped cream and syrup are included in the ingredients list, several of their beverage offerings were categorized as sugary drinks, rather than milk.

Of the restaurant chains that offered sugary beverages (n=111) in 2019, 6 offered only sugary beverages without any other beverage options on the children's menu. These chains included Popeyes Louisiana Kitchen, Smoothie King, Tropical Smoothie Cafe, Huddle House, Penn Station, and Donatos Pizza.

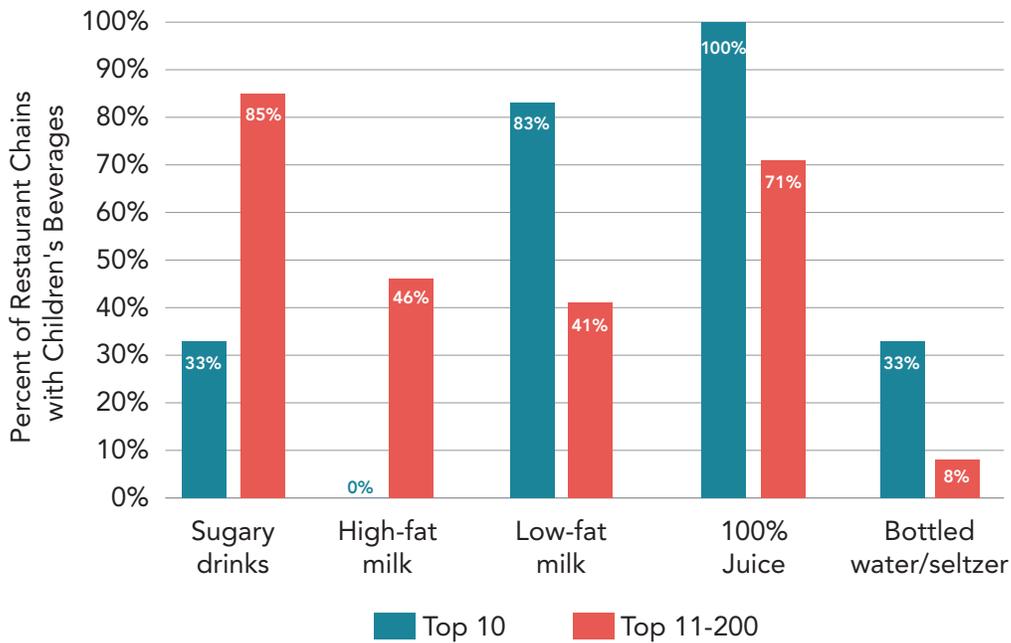


Popeyes Louisiana Kitchen was one of only six of the top restaurant chains to offer only soda and other sugary drink (and not healthier alternative) options with kids' meals. Its unhealthy kids' meal beverages also were promoted with a tie in to How to Train Your Dragon.

We found the largest of the top chains offered healthier beverages to children more than smaller chains did. We compared beverage offerings at the 6 restaurant chains within the top 10 with children's meals or children's beverages to the 128 restaurant chains in the top 11-200 with children's meals or children's beverages (Figure 3). Six of the top 10 chain restaurants offered child-sized beverages (McDonald's, Starbucks, Subway, Burger King, Wendy's, and Chick-fil-A). Only two (Starbucks and Chick-fil-A) of those 6 listed sugary drinks on the children's menu. In contrast, 84 percent (108 of 128) of the restaurant chains ranked from 11 to 200 offered sugary drinks on their children's menus.

All top 10 restaurant chains with child-sized beverages offered 100 percent juice. Eighty-three percent offered low-fat milk, 33 percent offered bottled water or seltzer, and none served high-fat milk on their children’s menu. In comparison, 41 percent of restaurant chains ranked 11 to 200 with children’s menus offered low-fat milk, 46 percent had high-fat milk, 71 percent offered 100 percent juice, and 8 percent offered bottled water or seltzer.

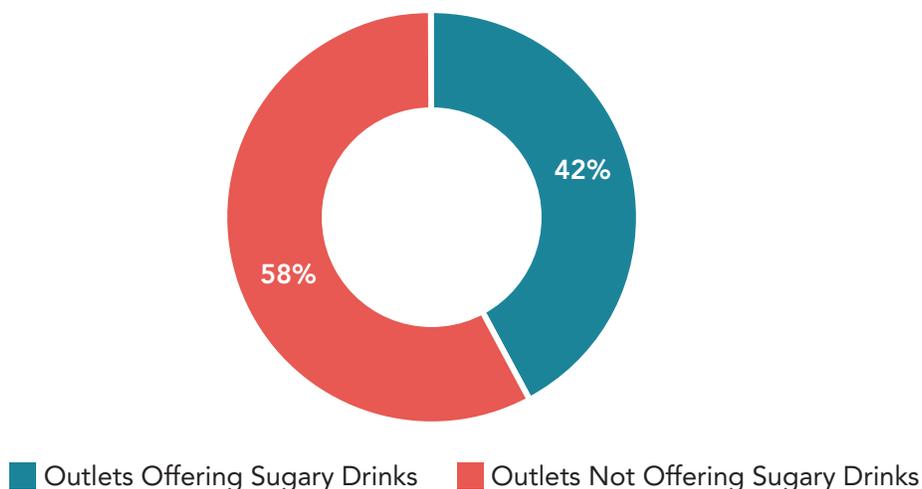
Figure 3: Children’s Menu Beverage Offerings in Top 10 vs. Top 11-200 Restaurants



A number of the largest restaurant chains, which operate a larger number of outlets, have pledged to stop promoting sugary drinks on children’s menus.

A number of the largest restaurant chains, which operate a larger number of outlets, have pledged to stop promoting sugary drinks on children's menus.⁴¹ The top 10 restaurant chains make up nearly half (n=69,051) of the total number of restaurant outlets of the top 200 restaurant outlets that offer child-sized beverages (n=142,747). Out of 142,747 total restaurant outlets with child-sized beverages, 42 percent offer sugary drinks (n=59,674) and 58 percent do not (n=83,073) (Figure 4).

Figure 4: Top 200 Restaurant Outlets with Sugary Beverages on the Children's Menu



Restaurants among the top 10 chains that do not offer sugary drinks for children (McDonald's (14,155 outlets), Subway (26,744 outlets), Burger King (7,156 outlets), and Wendy's (5,739 outlets)) made up 65 percent of the restaurant outlets not offering sugary drinks on the children's menu.

We observed a steady decrease in the percent of restaurant chains with sugary drinks on the children's menu (Figure 1). In 2008, 93 percent of top 50 chains with children's menus had sugary drinks for children compared to 61 percent in 2019.⁴²

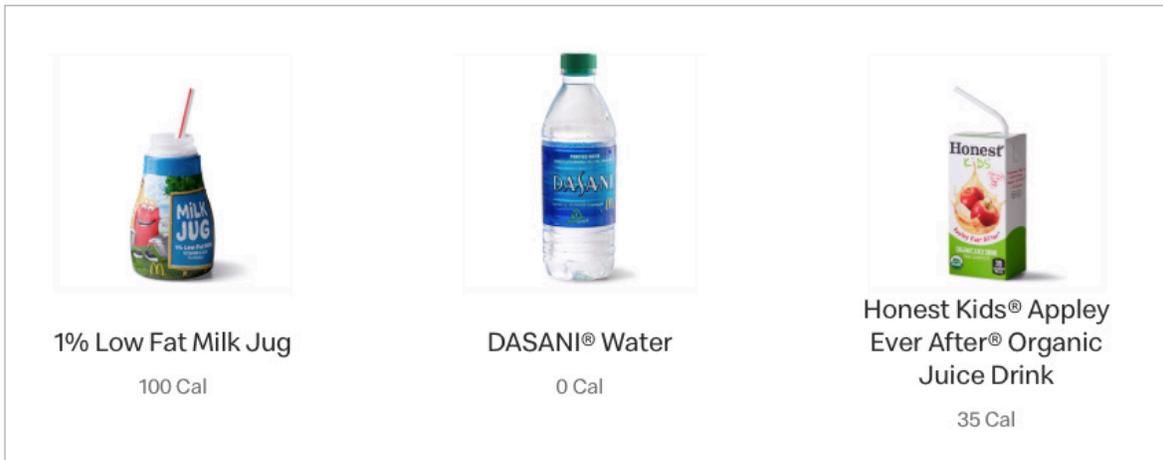
Changes over time: Our previous children's meal studies assessed the top 50 restaurant chains, and so we were able to look at trends over time for top chains. We observed a steady decrease in the percent of restaurant chains with sugary drinks on the children's menu (Figure 1). In 2008, 93 percent of top 50 chains with children's menus had sugary drinks for children compared to 61 percent in 2019.⁴²

Of the restaurant chains that were ranked within the top 50 in both 2008 and 2019 (n=40), 21 out of 22 with children's menus had sugary beverages on the kids' menu in 2008 (Subway did not). By 2019, 11 chains had dropped sugary beverages, leaving 50 percent (n=11) of the chains with sugary beverages on their children's menus. Other changes among the top 50 since 2008 include, Taco Bell eliminating its children's menu, Carl's Jr. adding a children's menu with sugary beverages and later dropping the sugary beverages, and The Cheesecake Factory adding a children's menu with sugary beverages.

Discussion and Recommendations

Since the Center for Science in the Public Interest's first study in 2008, the restaurant industry has made progress in removing sugary drinks from children's menus. Our analysis suggests that there has been progress towards healthier default beverages for children, especially among the largest chains.

Two-thirds of the top 10 restaurants do not have sugary drinks on their children's menus, but only 15 percent of other top chains do not. All 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 restaurants (Table 1), as well as beverage industry support for healthy default beverages at restaurants,^{43,44} show that such commitments are feasible.



Since McDonald's removed soda from its children's menus, the percentage of Happy Meals sold with soda has decreased from 63 percent to 48 percent from 2013 to 2018 in the United States.⁴⁸

In addition to working to improve beverages, restaurants should improve their food offerings for children, which are often dominated by unhealthy options such as deep-fried chicken nuggets, cheeseburgers, and macaroni and cheese. Restaurants also should commit to healthy default side items, such as fruits and vegetables, with children's meals, in place of common sides like french fries. Restaurants can formally commit to improving their food offerings by joining the National Restaurant Association's Kids LiveWell program, which establishes nutrition standards for a portion of a restaurant's children's menu offerings.

The progress on restaurant children's menus is the result of hard work by advocates, email campaigns and social media engagement by parents and supporters of healthy children, media campaigns, corporate engagement, restaurant voluntary commitments, and state and local kids' meal policies. For example, the American Beverage Association and its members, The Coca-Cola Company, Keurig Dr Pepper, and PepsiCo, adopted voluntary guidelines for healthier default beverages for children and have committed to work with their restaurant customers to adopt them.⁴⁵

Currently, 69 percent (n=93) of restaurant chains in the top 200 with children's beverages offer Coca-Cola products, while 28 percent (n=38) offer Pepsi products (3 percent offer neither; n=4). Of the 93 restaurant chains that offer Coca-Cola products, 83 percent (n=77) offer sugary beverages on their children's menu. Of the

38 restaurant chains that offer Pepsi products, 82 percent (n=31) offer sugary beverages on their children's menu. The Coca-Cola Company and PepsiCo should urge all restaurants with which they have beverage contracts to remove sugary beverages from children's menus.

Given that most restaurant chains still have soda and other sugary drinks on children's menus, states and communities are passing policies to protect children's health and improve child nutrition. There is a growing movement of healthy kids' meal policies, including laws passed in the states of California, Delaware, and Hawaii; New York City; Baltimore, MD; Louisville, KY; Lafayette, CO; and a dozen more localities.⁴⁶ Many more states and localities are working toward policies. The majority of passed policies require healthier default beverages with children's meals. Some under consideration would improve the nutritional quality for all items on children's menus (both foods and beverages). Jurisdictions interested in reducing harms from sugary drinks could address all beverages sold at restaurants by setting healthier portion sizes and making the defaults that come with value meals healthier.

A combination of actions has led to more restaurant chains offering healthier default beverages with children's meals. There has been significant progress, but there is more to do to get soda and other sugary drinks off restaurant children's menus.

Restaurant chains and the National Restaurant Association, alongside beverage companies and the American Beverage Association, should do more to improve the healthfulness of the beverages on the adult menu to make it easier for all restaurant guests to make healthier choices. They could decrease beverage portion sizes, including by repurposing their "kid-sized cups" as the new "small" on the adult menu, and shifting the rest of the beverage sizes accordingly, eliminating the largest size. Taco Bell eliminated its extra-large drink size without consumer pushback

or a negative financial impact.⁴⁷ Given the link between soda and obesity, other chains should do the same.

In addition, restaurants should add more no-, low-, and mid-calorie beverages to their adult offerings. They could also encourage and provide suggestions for ways to make low-calorie options more appealing through the Coca-Cola Freestyle or Pepsi Spire machines. Finally, with technology innovations in restaurants, including kiosk ordering, electronic menu boards, and updated beverage fountains, restaurants should present healthy options first and in the most prominent place on menus, and encourage their selection through promotion and pricing.

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