Important Reader Note: This report is interactive. We recommend opening it in Adobe Acrobat Reader to enable all interactive and accessibility features. Most other PDF viewers and browsers will enable some of those features, but not all. If you have trouble with the interactive features, you can access a fully non-interactive version of the report here.
Reader Guide and Recommendations

This report includes a variety of media and interactive features. To understand and enhance the viewing experience, we suggest the following:

1) Open the document in the latest version of Adobe Acrobat Reader, downloadable for free here.

2) Set the zoom to “page level”.

3) Use the interactive features for navigation, rather than scrolling:
   A) Click the gray tabs to see additional content.
   B) Navigate to any part of the report by clicking on the Navigation Menu in the top right corner.
   C) Navigate to the next or previous section using buttons at the bottom of each slide.

4) Click text boxes with underlining to see any definitions.

5) To enable the videos and animations in Acrobat Reader, go to Edit > Preferences > 3D & Multimedia and make sure the boxes for “Use Flash Player for playing 3D and multimedia content” and “Enable playing of 3D Content” are checked and click OK. Then to enable the Flash Player click on the box to the right and OK when prompted.
Background

In 2018, McDonald’s announced five ambitious Global Happy Meal Goals to be achieved by the end of 2022.

Goal 1: Offer Balanced Meals

Ensure 50% or more of Happy Meal Bundle Offerings listed on menus in each market meet McDonald’s Global Happy Meal Nutrition Criteria.

Goal 2: Simplify Ingredients

Remove artificial flavors and added colors from artificial sources from all Happy Meal Bundle Offerings. Reduce artificial preservatives in Happy Meal Bundle Offerings where feasible without sacrificing the safety, taste, quality, or value of food.

Goal 3: Be Transparent with Happy Meal Nutrition Information

Make nutrition information available for all Happy Meal Bundle Offerings on McDonald’s owned websites and mobile apps used for ordering where they exist.

Goal 4: Market Responsibly

All bundles advertised to children will meet McDonald’s Global Happy Meal Nutrition Criteria and will continue to meet existing applicable local/regional advertising pledges with respect to marketing to children.

Goal 5: Increase Purchase of Items Containing Recommended Food Groups

Leverage innovative marketing to help increase purchase of foods and beverages that contain recommended food groups in Happy Meals.
**Scope**

By the end of 2022, McDonald’s aims to achieve the five Happy Meal Goals in all markets globally, with independent measurement and reporting of progress among 20 major markets representing nearly 85% of Happy Meal sales. 1

**PARTICIPATING MARKETS**

1 It is important to note that McDonald’s global system consists of both Company-owned and franchised restaurants. The franchised restaurants are operated by conventional Franchisees, developmental licensees (i.e., a Franchisee that operates most or all of the McDonald’s-branded restaurants in a specific market) or pursuant to other licensing arrangements, and make up the majority of McDonald’s-branded restaurants around the world. McDonald’s Franchisees make independent decisions for their own business organizations, subject to their obligations under the operative franchise or other license agreements and core standards required for the McDonald’s brand. McDonald’s does not prescribe all business requirements for their Franchisees, but rather they work in collaboration with them to raise awareness and provide tools and opportunities to assist them as part of the brand’s food journey. McDonald’s also works with Franchisees to mutually set objectives and targets and to help monitor their related progress. As a result, while McDonald’s will encourage Franchisees to participate in the important goals outlined in this document, McDonald’s cannot guarantee their compliance. However, McDonald’s can drive change in Company-owned restaurants so much of this work will start with Company-owned restaurants, with a plan to demonstrate success and expand measurement, and that will ultimately help to support independent Franchisees that choose to join McDonald’s on this journey.
Photos from 665 secret shopper restaurant visits were used to confirm the Happy Meal Bundle Offerings in each market.

Ingredient lists for each Happy Meal menu item showed which contained artificial flavors, added colors from artificial sources, or artificial preservatives.

Sales data were used to show the sales trends of Happy Meal items containing recommended food groups.

Ad placement data verified that the only ads shown to children were the ones that were designed to meet McDonald’s advertising pledges.

Global Sales Data

Quarterly website and mobile app audits verified whether complete nutrition information for all Happy Meal Bundle Offerings was available.

Global Sales Data

Website and Mobile App Audits

Ingredient Lists

Video and Image Files

Independent Restaurant Surveys

Definitions

See the Appendix for Detailed Methodology

McDonald’s committed to participate in independent verification and progress reporting of the 2018 Global Happy Meal Goals every two years. This process includes the collection of data reported directly by the 20 major McDonald’s market teams as well as independent data collection. This interim public report details the progress that the 20 major markets have made through early 2020.
McDonald’s committed to participate in independent verification and progress reporting of the 2018 Global Happy Meal Goals every two years. This process includes the collection of data reported directly by the 20 major McDonald’s market teams as well as independent data collection. This interim public report details the progress that the 20 major markets have made through early 2020.

**Data Sources & Definitions**

Data Sources & Definitions

Happy Meal Bundle: The complete meal (main, side(s), beverage) offered under the Happy Meal Brand.

Happy Meal Bundle Offering (All Goals): A Happy Meal Bundle that includes only menu items that are listed in the Happy Meal section of Menu Boards posted in restaurants and drive thrus. Happy Meal Bundles that include menu items that do not appear on the Happy Meal section of the Menu Board, but are still available for purchase upon customer request (e.g. soft drinks), are not considered to be Happy Meal Bundle Offerings.

Menu Board (Goal 1): In-store and drive-thru Menu Boards that are used by customers to select items when placing an order as well as menus in system-owned digital tools used for ordering. Price list boards required by local law are not considered to be Menu Boards. “Secondary menus” that are accessed through an “other” button in the Happy Meal ordering flow on system-owned mobile apps and self-ordering kiosks are also not considered Happy Meal Menu Boards.

Global Happy Meal Nutrition Criteria (Goals 1 and 4): Happy Meal Bundles that meet the Criteria must have less than or equal to: 600 calories, 10% of calories from saturated fat, 10% of calories from added sugar, and 650 milligrams of sodium.

Complete Nutrition Information (Goal 3) includes calories, fat, saturated fat, total sugar, sodium, carbohydrates, and protein.

Advertising Directed to Children (Goal 4): If a local food pledge commitment exists, the “directed to children” definition in that food pledge applies. In countries without a local food pledge commitment, for measured media, this definition includes media purchased for any program or website where the expected audience generally consists of 35% or more of children under the age of 12 years. In unmeasured media, other factors, such as the overall impression of the advertising, the target demographic based on the media plan and whether age screening applies are used to determine whether it is directed to children. External advertising vehicles covered are: national TV, radio, third party paid print (e.g., kids’ magazines), computer games, and paid advertising on third party digital platforms. In-store advertising vehicles covered are: national in-store merchandising (POP), including posters and graphics.

Recommended Food Groups (Goal 5) include fruit, vegetables, low-fat dairy, whole grains, lean protein and/or water.
An average of 43% of Happy Meal Bundle Offerings met the Nutrition Criteria across the 20 major markets in 2019.

The top 20 major markets provided complete nutrition information for an average of 88% of Happy Meal menu items on their websites and 87% on qualifying mobile ordering apps in mid-2020.

93% of Happy Meal menu items had no artificial flavors, added colors from artificial sources, or artificial preservatives that could be feasibly reduced in early 2020.

83% of all Happy Meal Bundles shown in children’s ads met the Nutrition Criteria in 2019, on average.

2.5+ billion Happy Meal items sold in 2018 and 2019 in the 20 major markets contained recommended food groups (fruit, vegetable, low-fat dairy, water, lean protein, and/or whole grain).
Goal 1: Offer Balanced Meals

Ensure 50% or more of Happy Meal Bundle Offerings listed on menus in each market meet McDonald’s Global Happy Meal Nutrition Criteria.

Key Data Points

8 of the 20 major markets met the 2022 goal in 2019, up from 3 markets in 2018.

An average of 43% of Happy Meal Bundles met the Nutrition Criteria across the 20 major markets in 2019.

Average percentage of Happy Meal Bundle Offerings that met the Nutrition Criteria in 2018 and 2019

Data Highlights

Average nutritional profile of Happy Meal Bundle Offerings shown on menu boards across the 20 major markets (2018 vs. 2019)

- Grams of Saturated Fat: 4.9 (2018), 4.3 (2019)
- Grams of Added Sugar: 7.3 (2018), 5.9 (2019)
Goal 1: Offer Balanced Meals

Ensure 50% or more of Happy Meal Bundle Offerings listed on menus in each market meet McDonald’s Global Happy Meal Nutrition Criteria.

Key Data Points

8 of the 20 major markets met the 2022 goal in 2019, up from 3 markets in 2018.

An average of 43% of Happy Meal Bundles met the Nutrition Criteria across the 20 major markets in 2019.

Average percentage of Happy Meal Bundle Offerings that met the Nutrition Criteria in 2018 and 2019

11 percentage points

32% 43%

2018 2019

Examples of actions markets have taken to meet Goal 1:

Sweden  China  Canada

In January 2019, Sweden introduced a 4-piece Falafel entrée which was its first vegan entrée in the Happy Meal. This helped increase the share of bundles meeting the criteria by an average of 7.7 percentage points during the 11 months that it was offered.
China revamped its Happy Meal Bundle offering in 2019. This new offering automatically includes a fruit or vegetable as a second side in addition to Kids Fries or Corn Cup as a first side. The Kids Fish Filet Burger, specially designed for children, was also introduced as a protein option. Overall, the revamp increased the share of Happy Meal Bundle Offerings in China meeting the Criteria from 28% to 70%.

Key Data Points

- 8 of the 20 major markets met the 2022 goal in 2019, up from 3 markets in 2018.
- An average of 43% of Happy Meal Bundles met the Nutrition Criteria across the 20 major markets in 2019.

Average percentage of Happy Meal Bundle Offerings that met the Nutrition Criteria in 2018 and 2019

Examples of actions markets have taken to meet Goal 1:

- Sweden
- China
- Canada

China revamped its Happy Meal Bundle offering in 2019. This new offering automatically includes a fruit or vegetable as a second side in addition to Kids Fries or Corn Cup as a first side. The Kids Fish Filet Burger, specially designed for children, was also introduced as a protein option. Overall, the revamp increased the share of Happy Meal Bundle Offerings in China meeting the Criteria from 28% to 70%.
Goal 1: Offer Balanced Meals

Ensure 50% or more of Happy Meal Bundle Offerings listed on menus in each market meet McDonald’s Global Happy Meal Nutrition Criteria.

Key Data Points

8 of the 20 major markets met the 2022 goal in 2019, up from 3 markets in 2018.

An average of 43% of Happy Meal Bundles met the Nutrition Criteria across the 20 major markets in 2019.

Average percentage of Happy Meal Bundle Offerings that met the Nutrition Criteria in 2018 and 2019

Canada introduced new Grilled Chicken and Crispy Chicken Snack Wraps with improved nutritional profiles in October 2019. These two entrées increased the percentage of bundles meeting the Criteria by 7.1 percentage points. The nutritional profiles changed as follows:

<table>
<thead>
<tr>
<th>Nutrient</th>
<th>Grilled Chicken Snack Wrap</th>
<th>Crispy Chicken Snack Wrap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calories</td>
<td>-6%</td>
<td>-</td>
</tr>
<tr>
<td>Total Fat (g)</td>
<td>-13%</td>
<td>-</td>
</tr>
<tr>
<td>Saturated Fat (g)</td>
<td>-33%</td>
<td>-29%</td>
</tr>
<tr>
<td>Total Sugar (g)</td>
<td>-50%</td>
<td>-50%</td>
</tr>
<tr>
<td>Added Sugar (g)</td>
<td>-50%</td>
<td>-50%</td>
</tr>
<tr>
<td>Sodium (mg)</td>
<td>-31%</td>
<td>-41%</td>
</tr>
<tr>
<td>Cholesterol</td>
<td>-10%</td>
<td>-</td>
</tr>
</tbody>
</table>
Goal 2: Simplify Ingredients

Remove artificial flavors and added colors from artificial sources from all Happy Meal Bundle Offerings. Reduce artificial preservatives in Happy Meal Bundle Offerings where feasible without sacrificing the safety, taste, quality, or value of food.

Key Data Points

12 of the 20 major markets met the 2022 goal in early 2020.

18 of the 20 major markets have no artificial flavors in any Happy Meal Bundle Offerings.

17 of the 20 major markets have no added colors from artificial sources in any Happy Meal Bundle Offerings.

13 of the 20 major markets have reduced or removed artificial preservatives where feasible in all Happy Meal Bundle Offerings. ²

Footnotes
² The Goal is to reduce artificial preservatives where it is feasible without sacrificing the safety, taste, quality or value of McDonald's food.
Many markets have replaced ingredients in order to meet Goal 2. In March 2019, Australia removed the artificial flavor and added color from artificial sources from the spray cooking oil used in its Grilled Chicken Snack Wrap and Grilled Chicken Bites. After this change was made to the oil, no Happy Meal menu items in Australia contained artificial flavors or added colors from artificial sources.

Example of actions markets have taken to meet Goal 2:

- **Australia**
- **Poland**
- **Austria**

Many markets have replaced ingredients in order to meet Goal 2. In March 2019, Australia removed the artificial flavor and added color from artificial sources from the spray cooking oil used in its Grilled Chicken Snack Wrap and Grilled Chicken Bites. After this change was made to the oil, no Happy Meal menu items in Australia contained artificial flavors or added colors from artificial sources.

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2 The Goal is to reduce artificial preservatives where it is feasible without sacrificing the safety, taste, quality or value of McDonald’s food.
Goal 2: Simplify Ingredients

Remove artificial flavors and added colors from artificial sources from all Happy Meal Bundle Offerings. Reduce artificial preservatives in Happy Meal Bundle Offerings where feasible without sacrificing the safety, taste, quality, or value of food.

Key Data Points

- **12** of the 20 major markets met the 2022 goal in early 2020.
- **18** of the 20 major markets have no artificial flavors in any Happy Meal Bundle Offerings.
- **17** of the 20 major markets have no added colors from artificial sources in any Happy Meal Bundle Offerings.
- **13** of the 20 major markets have reduced or removed artificial preservatives where feasible in all Happy Meal Bundle Offerings. ²

Data Highlights

Examples of actions markets have taken to meet Goal 2:

- Australia
- Poland
- Austria

Many markets have introduced new Happy Meal menu items that do not contain artificial ingredients. Poland added carrot sticks and a new mousse (puree) from fruits and carrots to its Happy Meal Menu in January 2019. Neither of these items contain artificial flavors, added colors from artificial sources, or artificial preservatives.

² The Goal is to reduce artificial preservatives where it is feasible without sacrificing the safety, taste, quality or value of McDonald’s food.
In their annual sustainability report, Austria highlighted that it has no artificial flavors or added colors from artificial sources in any of its Happy Meal Bundle Offerings. Austria accomplished this by removing items that contained such ingredients from its Happy Meal menu and by adding rotating seasonal items that met Goal 2.

**Goal 2: Simplify Ingredients**

Remove artificial flavors and added colors from artificial sources from all Happy Meal Bundle Offerings. Reduce artificial preservatives in Happy Meal Bundle Offerings where feasible without sacrificing the safety, taste, quality, or value of food.

**Key Data Points**

- **12** of the 20 major markets met the 2022 goal in early 2020.
- **18** of the 20 major markets have no artificial flavors in any Happy Meal Bundle Offerings.
- **17** of the 20 major markets have no added colors from artificial sources in any Happy Meal Bundle Offerings.
- **13** of the 20 major markets have reduced or removed artificial preservatives where feasible in all Happy Meal Bundle Offerings.  

In their annual sustainability report, Austria highlighted that it has no artificial flavors or added colors from artificial sources in any of its Happy Meal Bundle Offerings. Austria accomplished this by removing items that contained such ingredients from its Happy Meal menu and by adding rotating seasonal items that met Goal 2.

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2 The Goal is to reduce artificial preservatives where it is feasible without sacrificing the safety, taste, quality or value of McDonald’s food.
Goal 3: Be Transparent with Happy Meal Nutrition Information

Make nutrition information available for all Happy Meal Bundle Offerings on McDonald’s-owned websites and mobile apps used for ordering where they exist.

**Key Data Points**

12 of the 20 major markets met the 2022 goal in Q2 2020, up from 6 markets in Q1 2019.  

12 of the 20 major markets provided complete nutrition information for all Happy Meal Bundle Offerings on their websites.

7 of the 10 major markets that have qualifying mobile apps provided complete nutrition information for all Happy Meal Bundle Offerings on their apps.

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3 Japan is exempted from including saturated fat and total sugar information based on local regulatory standards.
Goal 3: Be Transparent with Happy Meal Nutrition Information

Make nutrition information available for all Happy Meal Bundle Offerings on McDonald’s-owned websites and mobile apps used for ordering where they exist.

Key Data Points

12 of the 20 major markets met the 2022 goal in Q2 2020, up from 6 markets in Q1 2019.³

12 of the 20 major markets provided complete nutrition information for all Happy Meal Bundle Offerings on their websites.

7 of the 10 major markets that have qualifying mobile apps provided complete nutrition information for all Happy Meal Bundle Offerings on their apps.

Examples of actions markets have taken to meet Goal 3:

On the McDonald’s Russia website, users can click the “i” next to each Happy Meal item to view complete nutrition information for that item.

³ Japan is exempted from including saturated fat and total sugar information based on local regulatory standards.
Goal 3: Be Transparent with Happy Meal Nutrition Information

Make nutrition information available for all Happy Meal Bundle Offerings on McDonald’s-owned websites and mobile apps used for ordering where they exist.

Key Data Points

12 of the 20 major markets met the 2022 goal in Q2 2020, up from 6 markets in Q1 2019.

12 of the 20 major markets provided complete nutrition information for all Happy Meal Bundle Offerings on their websites.

7 of the 10 major markets that have qualifying mobile apps provided complete nutrition information for all Happy Meal Bundle Offerings on their apps.

Examples of actions markets have taken to meet Goal 3:

- Russia
- France

The McDonald’s France mobile app allows users to access nutrition information for Happy Meal items within the ordering sequence with just one tap.

Footnotes

3 Japan is exempted from including saturated fat and total sugar information based on local regulatory standards.
Goal 4: Market Responsibly

All Happy Meal Bundles advertised to children will meet McDonald’s Global Happy Meal Nutrition Criteria and will continue to meet existing applicable local/regional advertising pledges with respect to marketing to children.

Key Data Points

16 of the 20 major markets met the 2022 goal in 2019.

An average of 83% of all Happy Meal Bundles shown in children’s ads across the 20 major markets met the Nutrition Criteria in 2019.

100% of ads shown to children across the 20 major markets that showed Happy Meal menu items featured water, milk, or juice as a beverage and fruit, vegetables, or dairy as a side.

Data Highlights

Beverages
Average share of unique children’s advertisements with Happy Meal Bundles that featured water, milk, or juice.

- Water
- Milk
- Juice
- Multiple water, milk, or juice beverages

Sides
Average share of unique children’s advertisements with Happy Meal Bundles that featured a fruit, vegetable, or dairy side.

- Vegetables
- Dairy
- Fruit
- Multiple fruit, vegetable, or dairy sides
Goal 4: Market Responsibly
All Happy Meal Bundles advertised to children will meet McDonald’s Global Happy Meal Nutrition Criteria and will continue to meet existing applicable local/regional advertising pledges with respect to marketing to children.

Key Data Points

16 of the 20 major markets met the 2022 goal in 2019.

An average of 83% of all Happy Meal Bundles shown in children’s ads across the 20 major markets met the Nutrition Criteria in 2019.

100% of ads shown to children across the 20 major markets that showed Happy Meal menu items featured water, milk, or juice as a beverage and fruit, vegetables, or dairy as a side.

Examples of actions markets have taken to meet Goal 4:

USA

Netherlands

The Happy Meal Bundle featured in all children’s advertisements in the United States included 4 piece Chicken McNuggets, Kids Fries, Milk and Apple Slices. This, like all other Happy Meal Bundles shown in children’s advertisements in the U.S., met the Nutrition Criteria and the CFBAI (Children’s Food and Beverage Advertising Initiative) pledge.  

Footnotes
4 The Children’s Food and Beverage Advertising Initiative (CFBAI) is a voluntary commitment to advertise only products that meet CFBAI’s Uniform Nutrition Criteria.
Goal 4: Market Responsibly

All Happy Meal Bundles advertised to children will meet McDonald’s Global Happy Meal Nutrition Criteria and will continue to meet existing applicable local/regional advertising pledges with respect to marketing to children.

Key Data Points

16 of the 20 major markets met the 2022 goal in 2019.

An average of 83% of all Happy Meal Bundles shown in children’s ads across the 20 major markets met the Nutrition Criteria in 2019.

100% of ads shown to children across the 20 major markets that showed Happy Meal menu items featured water, milk, or juice as a beverage and fruit, vegetables, or dairy as a side.

Examples of actions markets have taken to meet Goal 4:

USA

Netherlands

The Happy Meal Bundle featured in most children’s advertisements in the Netherlands included 4 piece Chicken McNuggets, Small Fries, Water, and Cherry Tomatoes. This, like all other Happy Meal Bundles shown in children’s advertisements in the Netherlands, met the Nutrition Criteria and the EU pledge. 

Footnotes

5 The EU pledge is a voluntary initiative to use commercial communications to support parents in making the right diet and lifestyle choices for their children.
Goal 5: Increase Purchase of Items Containing Recommended Food Groups

Leverage innovative marketing to help increase purchase of foods and beverages that contain recommended food groups in Happy Meals.

Key Data Points

16 of the 20 major markets sold an increased share of Happy Meal items containing recommended food groups in 2019 versus 2018.

2.5+ billion
Happy Meal items sold in 2018 and 2019 in the 20 major markets contained recommended food groups (fruit, vegetable, low-fat dairy, water, lean protein, and/or whole grain).

50%
of all beverages sold in Happy Meals in 2019 were water, milk, or juice.

Examples of actions markets have taken to meet Goal 5:

Spain  Switzerland  Other Global Examples

In August 2019, during its Secret Life of Pets 2 promotion, McDonald’s Spain offered Melon Slices in Secret Life of Pets-themed packaging. Restaurants also displayed themed kiosks and menu boards that highlighted fruit and vegetable side options, including Melon Slices. The number of customers selecting Melon Slices as their dessert increased by 29% compared to August 2018.
Goal 5: Increase Purchase of Items Containing Recommended Food Groups
Leverage innovative marketing to help increase purchase of foods and beverages that contain recommended food groups in Happy Meals.

Key Data Points

16
of the 20 major markets sold an increased share of Happy Meal items containing recommended food groups in 2019 versus 2018.

2.5+ billion
Happy Meal items sold in 2018 and 2019 in the 20 major markets contained recommended food groups (fruit, vegetable, low-fat dairy, water, lean protein, and/or whole grain).

50%
of all beverages sold in Happy Meals in 2019 were water, milk, or juice.

Market Examples

Examples of actions markets have taken to meet Goal 5:

Spain
Switzerland
Other Global Examples

Throughout 2019, McDonald’s Switzerland consistently communicated and advertised its Happy Meal food and beverage options that contain recommended food groups (such as a 100% fruit pouch, carrots, water, and juice). From 2018 to 2019, they saw a 6% increase in sales of items containing recommended food groups.
Goal 5: Increase Purchase of Items Containing Recommended Food Groups

Leverage innovative marketing to help increase purchase of foods and beverages that contain recommended food groups in Happy Meals.

Key Data Points

- **16** of the 20 major markets sold an increased share of Happy Meal items containing recommended food groups in 2019 versus 2018.

- **2.5+ billion** Happy Meal items sold in 2018 and 2019 in the 20 major markets contained recommended food groups (fruit, vegetable, low-fat dairy, water, lean protein, and/or whole grain).

- **50%** of all beverages sold in Happy Meals in 2019 were water, milk, or juice.

Many other markets used creative marketing innovations to encourage the purchase of fruits, vegetables, and other items containing recommended food groups with Happy Meals.
Methodology

Because each of the five McDonald’s Global Happy Meal Goals is unique, the methodologies used to measure and verify their implementation is different for each. However, the methodologies all rely on a mix of information and data provided by the 20 McDonald’s market teams and independent data.

**Goal:** Ensure 50% or more of Happy Meal Bundle Offerings listed on menus in each market meet McDonald’s Global Happy Meal Nutrition Criteria.

**Data collection:** Each McDonald’s market provided a list of all Happy Meal menu items offered in 2018 and 2019 in Happy Meal Bundle Offerings, including the dates they were offered and their nutrition information. To independently confirm that these lists matched the Happy Meal menus in restaurants, secret shopper surveys were conducted at 665 randomly selected restaurants in late 2019 – 95 in the U.S. and 30 in each other market. Surveyors took photos of the Happy Meal sections of in-store and drive-thru Menu Boards and the complete Happy Meal ordering sequence of kiosks.

**Data analysis:** The menu items listed or pictured in the photos were recorded and compared against the information provided by McDonald’s. The menu items observed in the quarterly web and mobile audits used to measure Goal 3 and the sales data used for Goal 5 were also compared with the lists provided by the market teams. After correcting any inconsistencies in the menu item lists to align the lists with audit findings and market sales data, all possible Happy Meal Bundle combinations were identified. Nutrition information for each item was then used to determine which Happy Meal Bundles did and did not meet the Nutrition Criteria.

**Calculation:** To determine the annual average number of Happy Meal Bundle Offerings that met the Nutrition Criteria in each market, the percentage of Bundle Offerings meeting the Nutrition Criteria in each month was first calculated. Monthly percentages were then averaged to determine each market’s annual percentage. This helps account for variations in menu offerings over the course of a year. The global average is the simple average of all 20 markets’ annual percentages.
Methodology

Because each of the five McDonald’s Global Happy Meal Goals is unique, the methodologies used to measure and verify their implementation is different for each. However, the methodologies all rely on a mix of information and data provided by the 20 McDonald’s market teams and independent data.

<table>
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<tr>
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<th>Goal 2</th>
<th>Goal 3</th>
<th>Goal 4</th>
<th>Goal 5</th>
</tr>
</thead>
</table>

**Goal**: Remove artificial flavors and added colors from artificial sources from all Happy Meal Bundle Offerings. Reduce artificial preservatives in Happy Meal Bundle Offerings where feasible without sacrificing the safety, taste, quality, or value of food.

**Data collection**: McDonald’s ingredient roadmaps were collected for each market. These roadmaps identified all Happy Meal items and components of Happy Meal items (e.g., hamburger bun) and indicated whether they contained artificial flavors, added colors from artificial sources, or artificial preservatives in early 2020. The roadmaps then identified whether and when these ingredients were or will be removed or reduced. In cases where artificial preservatives could not be reduced without sacrificing the safety, taste, quality, or value of food, the roadmaps provided the reason(s) for this.

**Data analysis**: The roadmaps were reviewed to determine how many Happy Meal items, if any, contained artificial flavors, added colors from artificial sources, or artificial preservatives in each market.

**Note**: This goal is different than the other goals in that market teams, rather than the audit team, were responsible for verifying the accuracy of the information in their roadmaps and accounting for local variations in regulations/laws.
Methodology

Because each of the five McDonald’s Global Happy Meal Goals is unique, the methodologies used to measure and verify their implementation is different for each. However, the methodologies all rely on a mix of information and data provided by the 20 McDonald’s market teams and independent data.

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</tr>
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</table>

**Goal:** Make nutrition information available for all Happy Meal Bundle Offerings on McDonald’s-owned websites and mobile apps used for ordering where they exist.

**Data collection:** McDonald’s websites in all markets and mobile ordering apps in all markets that have them were reviewed on a quarterly basis in 2019 and 2020. The review checked whether the required nutrition information was or was not available on the websites and apps.

**Data analysis:** Menu items were categorized as being featured with full nutrition information, with partial nutrition information, with no nutrition information, or not being featured at all. Only the markets that featured full nutrition information for every Happy Meal menu item were marked as having met the goal.

**Exceptions:** Mobile apps that did not offer in-app ordering capabilities were not included in this analysis. Links to third party platforms (i.e., Uber Eats) were not considered in-app. In total, 10 apps are included in the Goal 3 results in this report.
Methodology

Because each of the five McDonald’s Global Happy Meal Goals is unique, the methodologies used to measure and verify their implementation is different for each. However, the methodologies all rely on a mix of information and data provided by the 20 McDonald’s market teams and independent data.

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<th>Goal 5</th>
</tr>
</thead>
</table>

**Goal:** All Happy Meal Bundles advertised to children will meet McDonald’s Global Happy Meal Nutrition Criteria and will continue to meet existing applicable local/regional advertising pledges with respect to marketing to children.

**Data collection:** Video and image files of all advertisements directed to kids were collected from market teams. McDonald’s ad agency of record in each market provided complete ad placement data for media where there were ads directed to children.

**Data analysis:** The Happy Meal Bundles shown in all advertisements directed to children were recorded and the complete nutrition information for those Happy Meal Bundles was calculated. They were then compared against the Global Happy Meal Nutrition Criteria to determine the share of Happy Meal Bundles shown that met the Global Happy Meal Nutrition Criteria. The ads were also reviewed to ensure that they met the requirements of other voluntary children’s advertising pledges made by McDonald’s (e.g., Children’s Food and Beverage Advertising Initiative, the EU Pledge). The ad placement data was used to ensure that (1) all ads directed to children had been reviewed and (2) no other ads (i.e., ads designed for adults) were being regularly shown to children. Ads that were shown between 9pm and 6am were automatically deemed to be not directed to children and were excluded from the analysis. Additionally, ads with low GRP (Gross Rating Point) measures – below 0.1 or 1 depending on the market – were deemed to have insufficiently reliable audience data. Often a low percentage (0%-5%) of the remaining ads that qualified as directed to children were adult ads that were not intended for children. If adult ads represented more than 2% of the ads shown to a child audience, then the audit team reviewed the content of the programs and channels where these adult ads were shown to verify that they were not kid’s programs.

**Ads included in the assessment:** External advertising vehicles covered are national TV, radio, third party paid print (e.g., kids’ magazines), computer games and paid advertising on third party digital platforms. In-store advertising vehicles such as national in-store merchandising (POP), including posters and graphics, are also included in this goal, but not for the verification. Previous store surveys showed that very few posters or graphics had Happy Meal bundles (<2% of surveyed restaurants in 2018). As a result, it was decided that these vehicles would not be reviewed for this round of verification.
Because each of the five McDonald’s Global Happy Meal Goals is unique, the methodologies used to measure and verify their implementation is different for each. However, the methodologies all rely on a mix of information and data provided by the 20 McDonald’s market teams and independent data.

**Methodology**

**Goal:** Leverage innovative marketing to help increase purchase of foods and beverages that contain recommended food groups in Happy Meals.

**Data collection:** Monthly sales data for 2018 and 2019 were collected from each market. The data included unit sales totals for all items served as part of the Happy Meal. Market teams were also asked to provide details of any innovative marketing initiatives undertaken in 2019 that may have helped to promote the sales of menu items containing recommended food groups.

**Data analysis:** Sales data were first assessed for consistency and completeness, and fixes were requested and implemented where appropriate. After the quality assurance process, trends in sales volumes and take rates were assessed to observe notable changes and the potential influence of the marketing strategies identified by each market team. The collective sales of all Happy Meal menu items were then summed for each market and year in order to compare 2019 versus the 2018 baseline year. In addition, a series of case studies showing lessons learned from the implementation of strategies aimed at increasing the sales and take rates of items containing recommended food groups are being developed and shared internally in order to foster learning and best practices across markets.