

McDonald's Global Happy Meal Goals

2020 Progress Report



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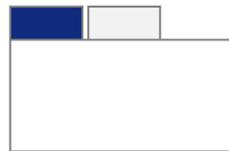


Reader Guide and Recommendations

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- 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.

Text text text



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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



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



Goal 5: Increase Purchase of Items Containing Recommended Food Groups



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.



Data Sources & Definitions

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.



Independent Restaurant Surveys

Photos from 665 secret shopper restaurant visits were used to confirm the Happy Meal Bundle Offerings in each market.



Ingredient Lists

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



Website and Mobile App Audits

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



Video and Image Files



Ad Placement Data

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



Data Sources & Definitions

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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 low-fat dairy, fruit, vegetables, lean protein, water, and/or whole grains.



Global Happy Meal Goal Highlights



Goal 1: Offer Balanced Meals

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



Goal 2: Simplify Ingredients

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.



Goal 4: Market Responsibly

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



Goal 3: Be Transparent with Happy Meal Nutrition Information

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.



Goal 5: Increase Purchase of Items Containing Recommended Food Groups

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

Key Data Points



8

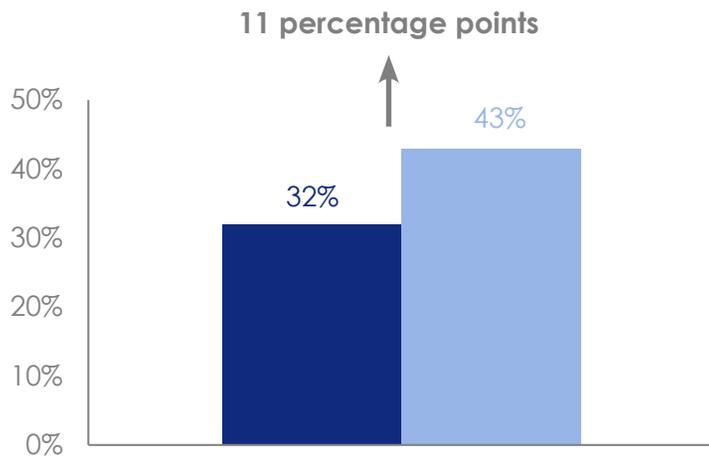
of the 20 major markets met the 2022 goal in 2019, up from 3 markets in 2018.



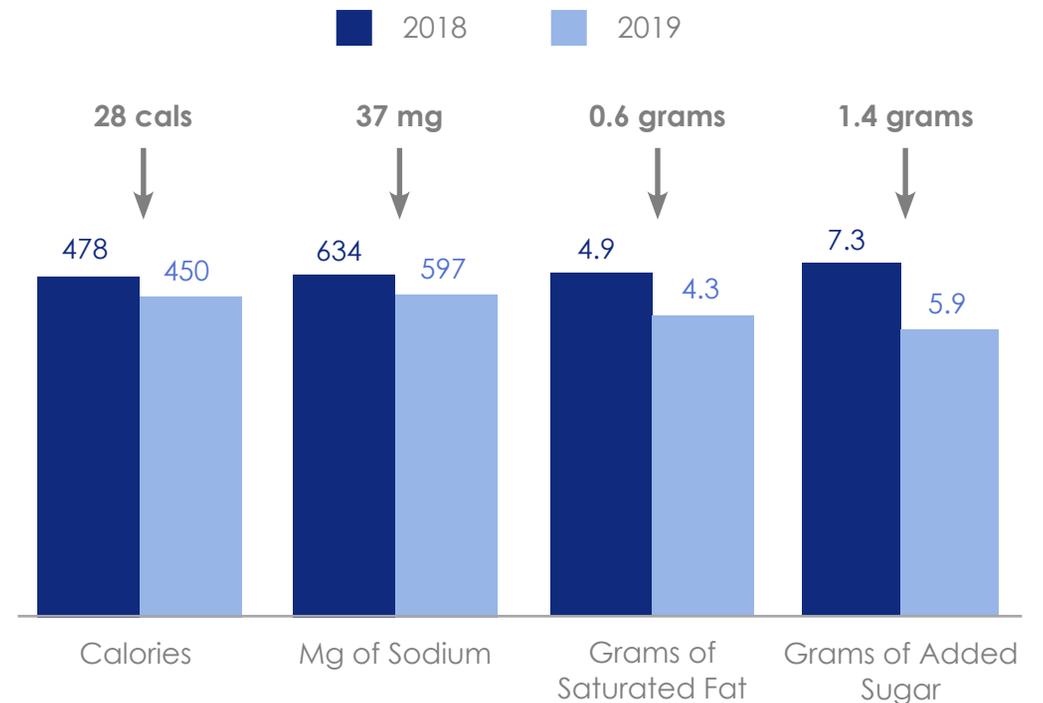
An average of **43%**

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



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



Goal 1: Offer Balanced Meals

Key Data Points



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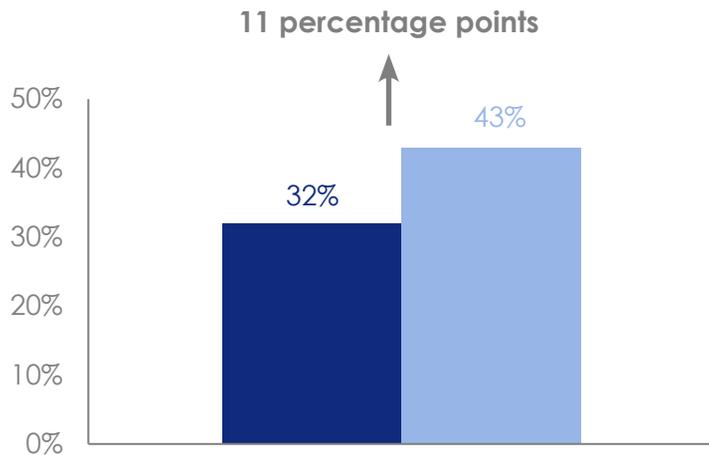
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Examples of actions markets have taken to meet Goal 1:



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.



Goal 1: Offer Balanced Meals

Key Data Points



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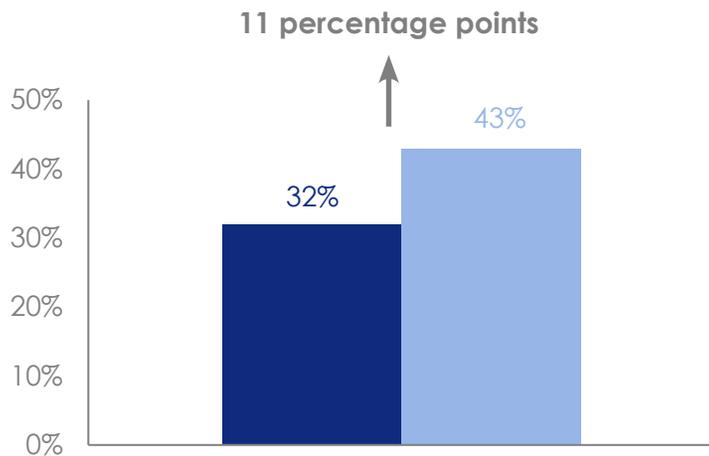
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Average percentage of Happy Meal Bundle Offerings that met the Nutrition Criteria in 2018 and 2019



Examples of actions markets have taken to meet Goal 1:



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

Key Data Points



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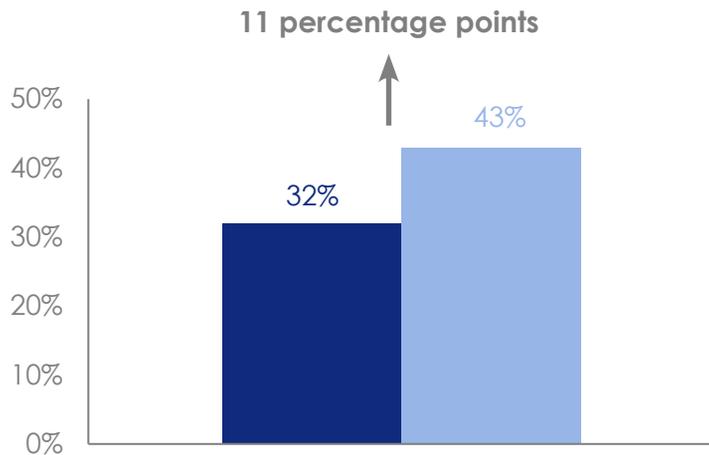
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Examples of actions markets have taken to meet Goal 1:



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:

Nutrient	Change	
	Grilled Chicken Snack Wrap	Crispy Chicken Snack Wrap
Calories	-8%	-
Total Fat (g)	-13%	-
Saturated Fat (g)	-33%	-29%
Total Sugar (g)	-50%	-50%
Added Sugar (g)	-50%	-50%
Sodium (mg)	-31%	-41%
Cholesterol	-10%	-



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.



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



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

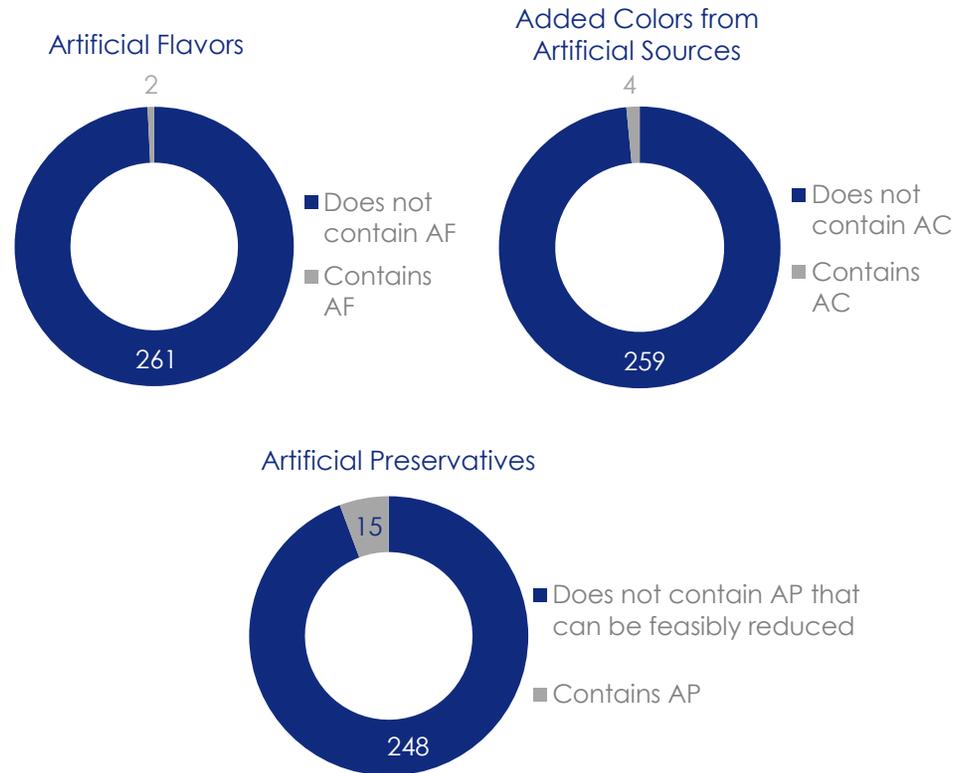


13

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

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

Happy Meal menu items across the 20 major markets that do or do not contain artificial flavors (AF), added colors from artificial sources (AC), and artificial preservatives (AP) as of early 2020.



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Examples of actions markets have taken to meet Goal 2:



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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Examples of actions markets have taken to meet Goal 2:



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.



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

Examples of actions markets have taken to meet Goal 2:



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 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.

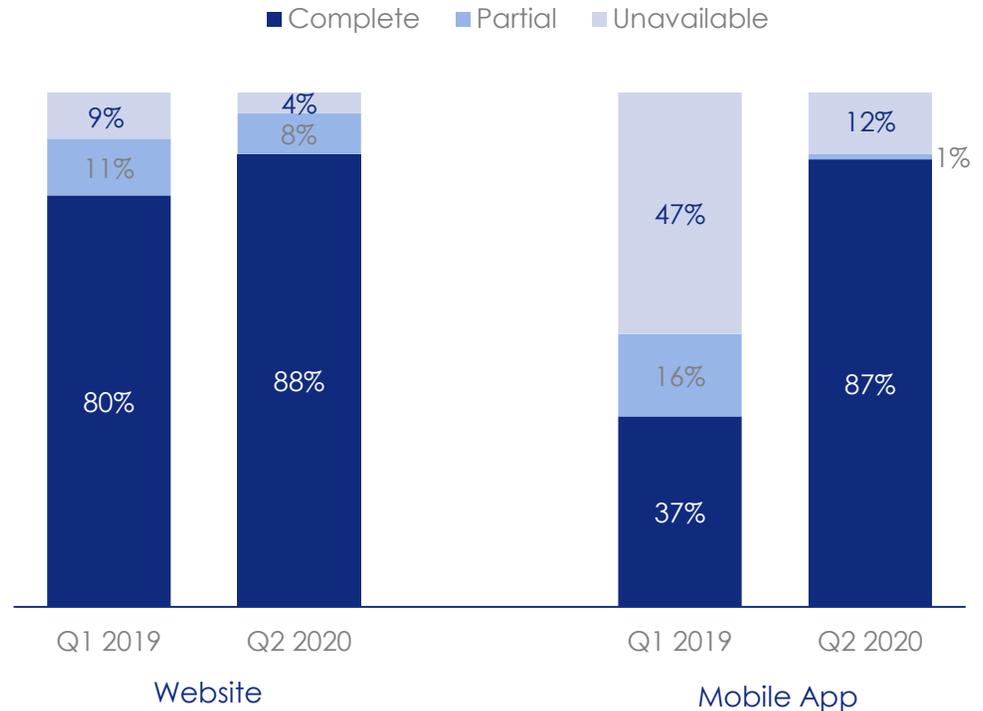


7

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

³ Japan is exempted from including saturated fat and total sugar information based on local regulatory standards.

Average share of Happy Meal menu items with complete, partial, or unavailable nutrient information in Q1 2019 and Q2 2020.



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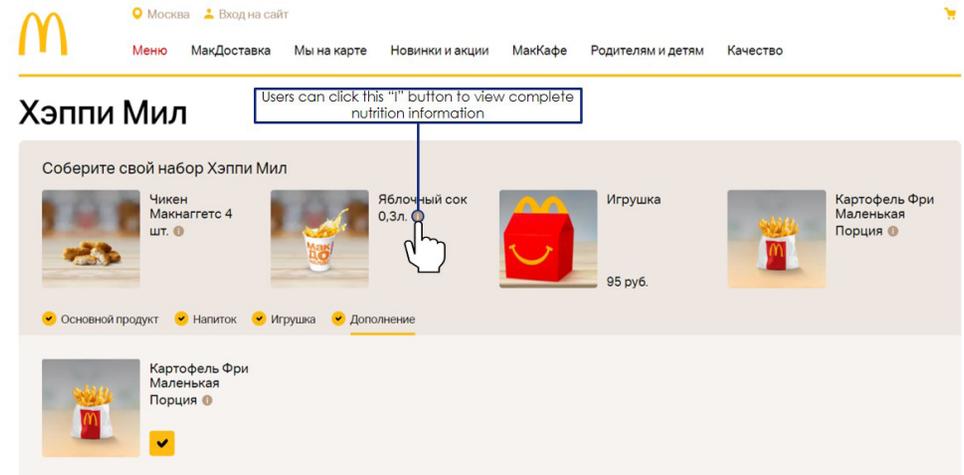


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Examples of actions markets have taken to meet Goal 3:



Стоимость: 179 руб.

Стоимость продукта может меняться. Актуальную стоимость продукта уточняйте в каждом конкретном предприятии «Макдоналдс»

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.



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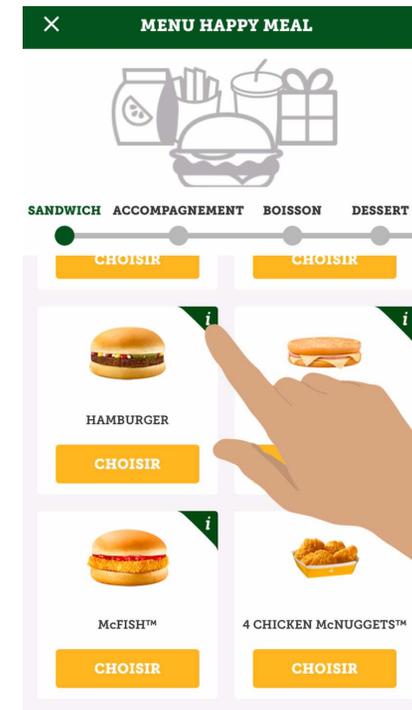


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Examples of actions markets have taken to meet Goal 3:



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



Goal 4: Market Responsibly

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.



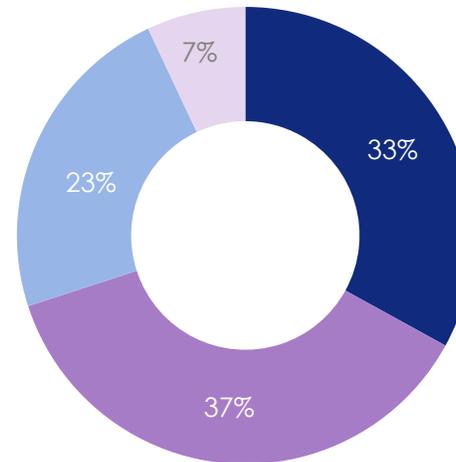
100%

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.

Beverages

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

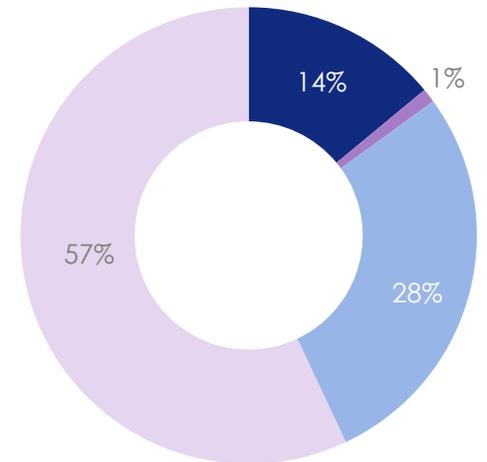
- Water
- Milk
- Juice
- Multiple water, milk, or juice beverages



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

Key Data Points



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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.

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.

Examples of actions markets have taken to meet Goal 4:



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. ⁴



Goal 4: Market Responsibly

Key Data Points



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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.

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.

Examples of actions markets have taken to meet Goal 4:



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. ⁵



Goal 5: Increase Purchase of Items Containing Recommended Food Groups

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:



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

Key Data Points



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Market Examples

Examples of actions markets have taken to meet Goal 5:



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

Key Data Points



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Market Examples

Examples of actions markets have taken to meet Goal 5:

Poland



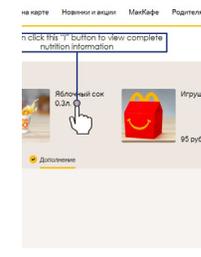
Sweden



Netherlands



Russia



United Kingdom



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.



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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: 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.



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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.



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