
ROBINSON & JAMES RESEARCH

GP quantitative results
May 2006

**Robinson & James
Research Pty Ltd**

Level 1, Bridgepoint
3 Brady Street
MOSMAN NSW 2092

PH: (02) 9953-4355
FAX: (02) 9969-6991
info@rjresearch.com.au

Prepared for:
Meat & Livestock Australia - May 2006

RESEARCH METHODOLOGY

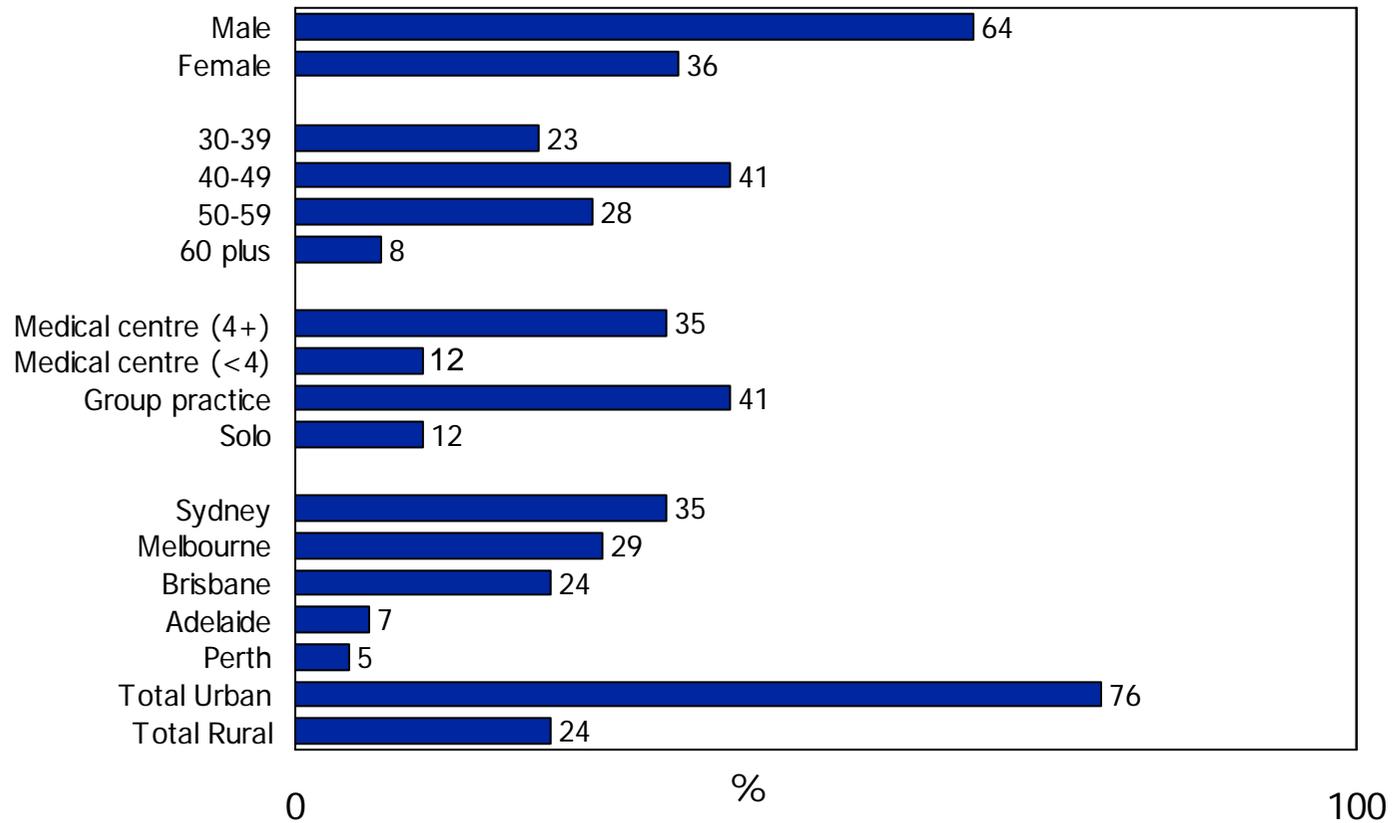
- ❑ For market research in both 2005 and 2006, GPs were interviewed via an web based structured quantitative questionnaire (research in previous years has employed telephone interviewing).

- ❑ A total of n=250 GPs were interviewed.

- ❑ GPs were selected at random, from a full national sample

- ❑ Interviewing took place between May 8 and May 24, 2006.

SAMPLE STRUCTURE



Base: All GPs, n=250

KPIs

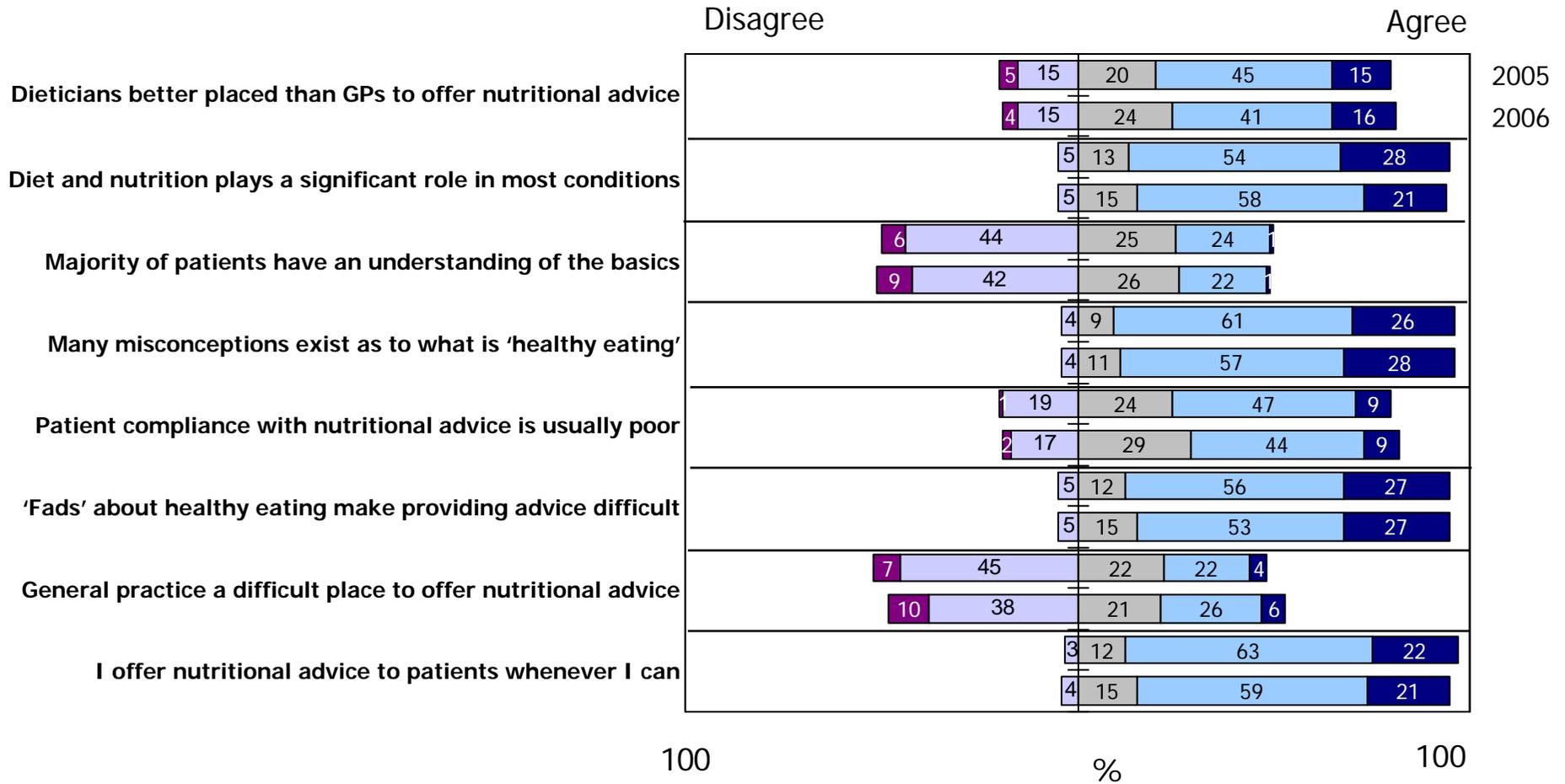
	May 2002	May 2003	May 2004	May 2005	July 2005	May 2006
	%	%	%	%	%	%
GPs recommending red meat 3-4 times / week	45	63	46	69	64	71
GPs recommending red meat 3-4 times / week for high cholesterol	42	52	39	48	47	46
GPs recommending red meat 3-4 times / week for obese patients	40	43	42	50	47	49
The nutrients in lean red meat make it an essential part of a balanced, healthy diet	90	84	86	83	83	81
Because it is high in protein, lean red meat satisfies the appetite and should be part of obesity management	75	70	71	62	73	65
For optimal vitality and performance, red meat should be eaten 3-4 times per week	73	69	67	70	71	68

Base: All GPs

NOTE: 2002, 2003, 2004 EMPLOYED TELEPHONE METHODOLOGY

SEGMENTATION ANALYSIS

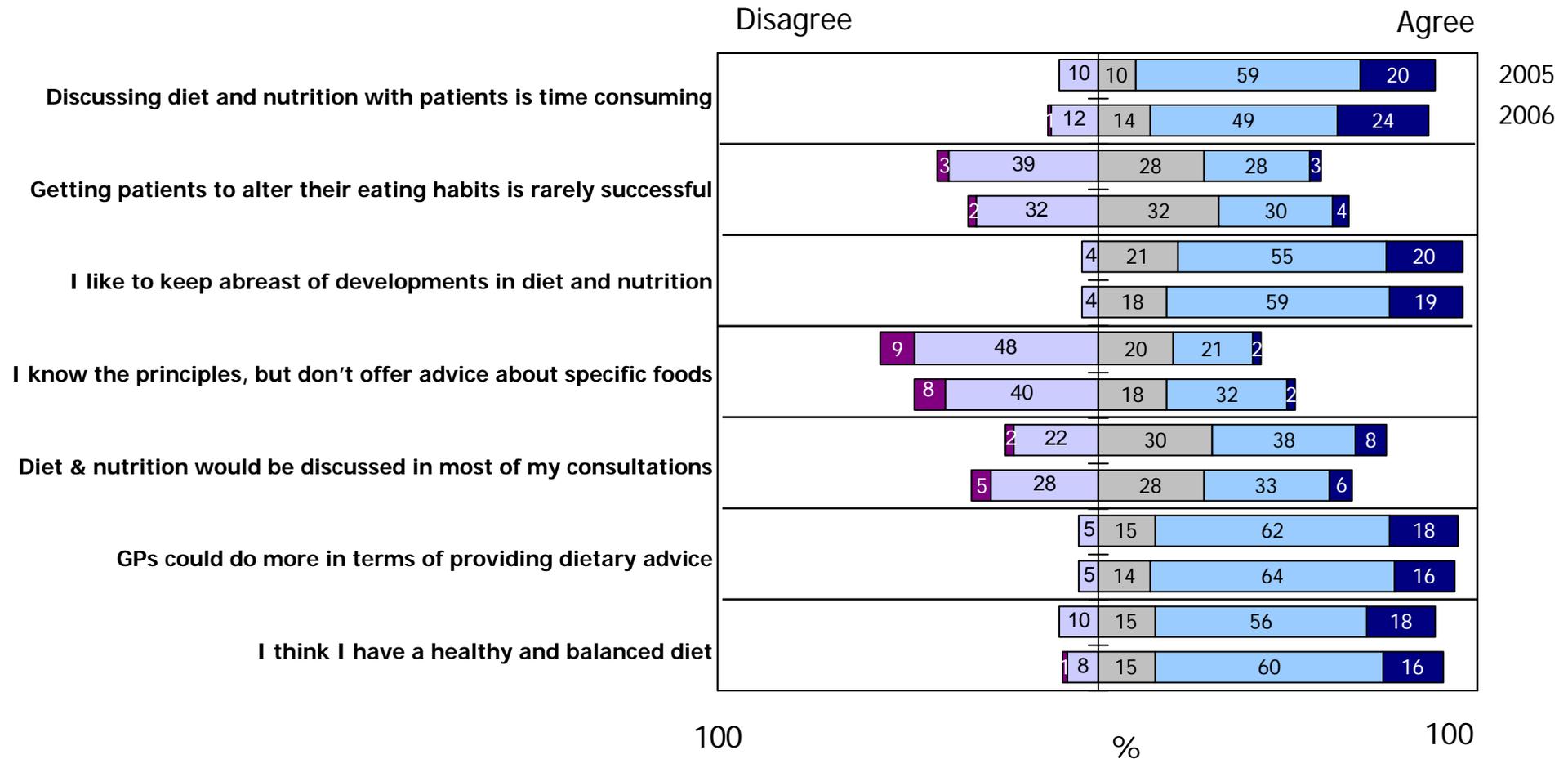
ATTITUDES TOWARDS NUTRITION



Base: All GPs



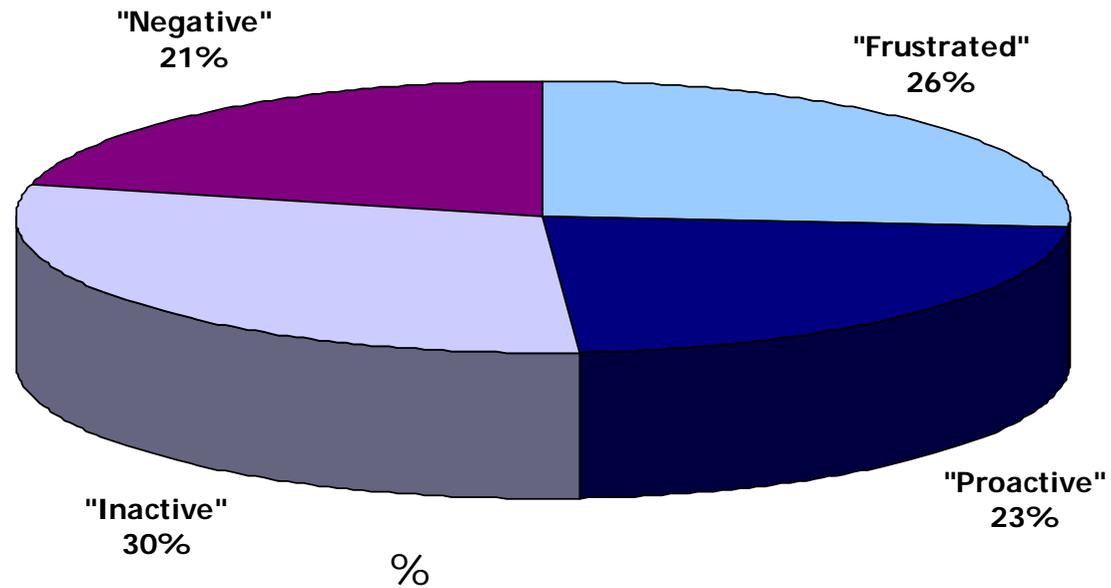
ATTITUDES TOWARDS NUTRITION



Base: All GPs



GP SEGMENTS



Base: All GPs

GP SEGMENTS

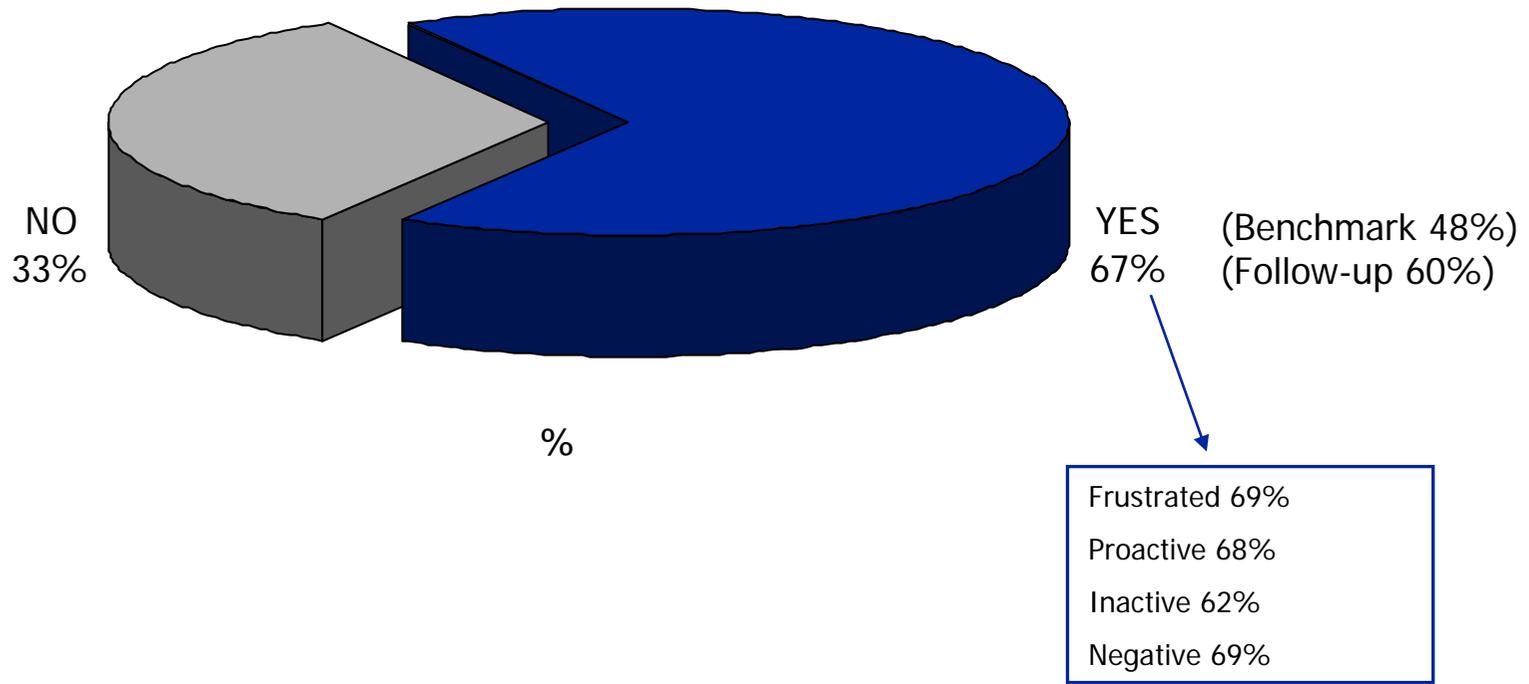
- ❑ *“Frustrated”* (26%)
 - Believe that getting patients to alter their eating habits is rarely successful and difficult, and that dieticians are better placed than GPs to offer nutritional advice. However they do it when they can, but are pushed for time.
- ❑ *“Proactive”* (23%)
 - Discuss diet and nutrition regularly, believe they can be successful and see it as suitable for general practice.
- ❑ *“Inactive”* (30%)
 - Believe they can be successful, but that patients have a reasonable understanding, consider it the domain of dieticians. Do not discuss diet or nutrition in most consultations.
- ❑ *“Negative”* (21%)
 - Very negative group: Believe that getting patients to alter their eating habits is unsuccessful; less likely to discuss diet and nutrition in consultations; do not tend to offer nutritional advice to patients wherever possible; less likely to offer specific advice.

DETAILED FINDINGS

THE COMPETITIVE LANDSCAPE

ADVERTISING RECALL

"Do you recall having seen any advertising recently in medical journals or medical newspapers about dietary, food or nutritional advice recommended to be given to patients "



Base: All GPs, n=250

ADVERTISING RECALL

“Can you please write in everything that you remember about the last advertisement you saw in medical journals or newspapers for dietary, food or nutritional advice ?”

	Benchmark	Follow-up	May 2006
	%	%	%
Nett: Dairy	48	27	32
Have dairy 3 times / day	13	6	5
Dairy healthy	11	4	2
Dairy good source calcium	11	8	5
Dairy can help weight loss	10	7	4
Dairy prevents osteoporosis	8	4	9
Ad for dairy NFI	8	4	5
Dairy good for healthy bones	-	-	6
Dairy good for cardiovascular system	3	3	4
Dairy good for bone development in children	3	1	1
Nett: Meat	13	48	37
Lean / red meat cuts / trays of meat with price tags	-	20	8
Serve children / eat red meat 3-4 times a week	-	12	8
Lean / red meat healthy / good for you / health benefits	-	11	5
Inghams / chicken don't contain hormones	6	1	5
Red meat good for iron / good iron content	3	8	11
Eat meat / red meat / encourage red meat consumption	3	8	8

ADVERTISING RECALL (cont.)

"Can you please write in everything that you remember about the last advertisement you saw in medical journals or newspapers for dietary, food or nutritional advice?"

	Benchmark	Follow-up	May 2006
	%	%	%
Nett: nutrients	20	13	30
Ad for vitamins / multivitamins	8	8	9
Showing calcium requirements	7	8	4
Ad for Centrum	-	-	6
Use of vitamins in pregnancy	-	-	7
Nett: Eggs	6	1	3
Eggs are healthy / part of healthy diet	3	-	2
Eggs not bad for cholesterol	3	1	1
Ads for weight loss	9	3	3
Increase fruit and vegetable intake	3	2	4
Other	12	16	14

Base: GPs recalling advertising

FOOD AND NUTRITIONAL ADVICE GIVEN

“What food & nutritional recommendations do you regularly give to patients to encourage healthy eating?”

	2001	2003	2004	Benchmark	Follow-up	May 2006
	%	%	%	%	%	%
Low in fats / oils	58	21	27 	58	51	54
High in / include fruit and vegetables	49	57	50	52	55	48
High in / fibre	30	39	26	32	21	29
Good variety / well balanced diet	25	13	21	28	29	24
Small amounts / low sugar	18	24	9	18	13	18
Include fish	14	27	14	18	20 	12
Low in saturated fats / animal fats	42	31	33 	16 	13	10
Carbohydrates / complex carbohydrates	17	21	14	14	16	6
Plenty / adequate water	9	21	10	12	12	10
Don't skip meals	-	-	- 	12 	17	10
Calcium supplements	1	9	6	11	8	15
Low GI foods	-	1	5	11	12	12
Include some protein / protein sources	13	12	7	10	14	9

Base: All GPs

FOOD AND NUTRITIONAL ADVICE GIVEN (cont.)

“What food and nutritional recommendations do you regularly give to patients to encourage healthy eating?”

	2001	2003	2004	Benchmark	Follow-up	May 2006
	%	%	%	%	%	%
Include low fat dairy products	20	12	19	9	6	6
Low in calories	-	-	-	9	5	3
Include lean red meat	21	27	12	8	21	16
Include dairy products	7	11	9	8	10	6
Low salt	11	21	9	8	7	12
Moderate alcohol	8	6	7	8	10	8
Less processed / packaged foods	-	-	-	8	18	8
Base on nutrition / food pyramid	17	19	14	7	6	6
Low junk foods / takeaways	13	6	7	7	6	13
Low in cholesterol / fats containing chol	7	5	2	6	4	7
Include vitamins / minerals	5	3	5	6	6	7
Smaller, more frequent meals	-	3	1	6	-	-
Include poultry / white meat	15	17	19	3	5	1
TOTAL MENTIONS	4.1	4.6	4.1	3.4	4.5	4.1

Frustrated 14%
Proactive 25%
Inactive 18%
Negative 6%

Base: All GPs

FOOD AND NUTRITIONAL ADVICE GIVEN

Patients with high cholesterol

“What food and nutritional recommendations do you regularly give to patients with high cholesterol?”

	Benchmark	Follow-up	May 2006
	%	%	%
Low in fats / oils	61	57	40
High in / include fruit and vegetables	26	35	19
Include fish	21	21	19
Low in animal fats	20	19	26
Low in saturated fat	17	16	23
High in / fibre	17	19	17
Include low fat dairy products	14	9	13
Low in cholesterol / fats containing cholesterol	10	11	10
Carbohydrates / complex carbohydrates	10	11	2
Low junk foods / takeaways	9	8	22
Small amounts / low sugar	8	9	4
Include lean red meat	7	13	13
Eat less dairy	7	11	17
Less processed / packaged foods	7	5	3
Less meat/ Low in red meat	9	8	10
Lose weight / weight loss advice	6	7	5
Include fish oil / omega 3 supplements	6	4	9

Frustrated 5%
Proactive 16%
Inactive 21%
Negative 6%

Base: All GPs

DIET AND COLORECTAL CANCER

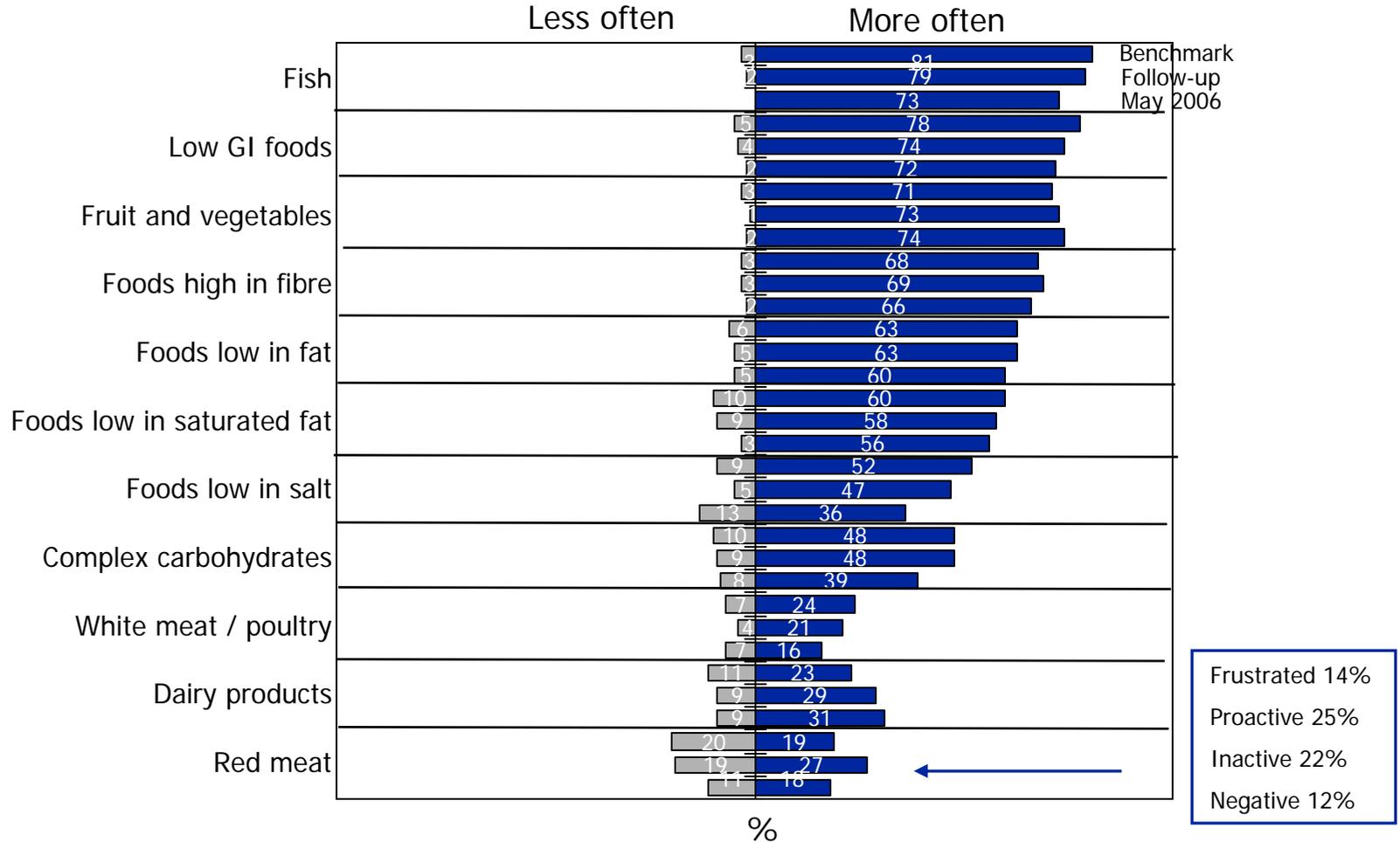
"In your opinion, what dietary factors do at risk patients need to consider to help prevent colorectal or bowel cancer?"

	Benchmark	Follow-up	May 2006	
	%	%	%	
Encourage high fibre diet	79	75	77	
Low fat diet	35	38	33	
Increase intake fresh fruit and vegetables	26	36	20	
Reduce meat / red meat intake	18	29	24	Frustrated 25% Proactive 26% Inactive 28% Negative 15%
Avoid burnt or charcoal foods	7	7	10	
Increase water / fluid consumption	6	7	8	
Encourage regular bowel habits	4	3	4	
Lower or cease consumption of alcohol	3	7	5	
Decrease processed foods	2	14	6	
Increase fish intake	2	3	-	
Encourage use of aspirin	2	-	1	
Cease smoking	2	3	4	
Other	14	12	11	

Base: All GPs, n=250

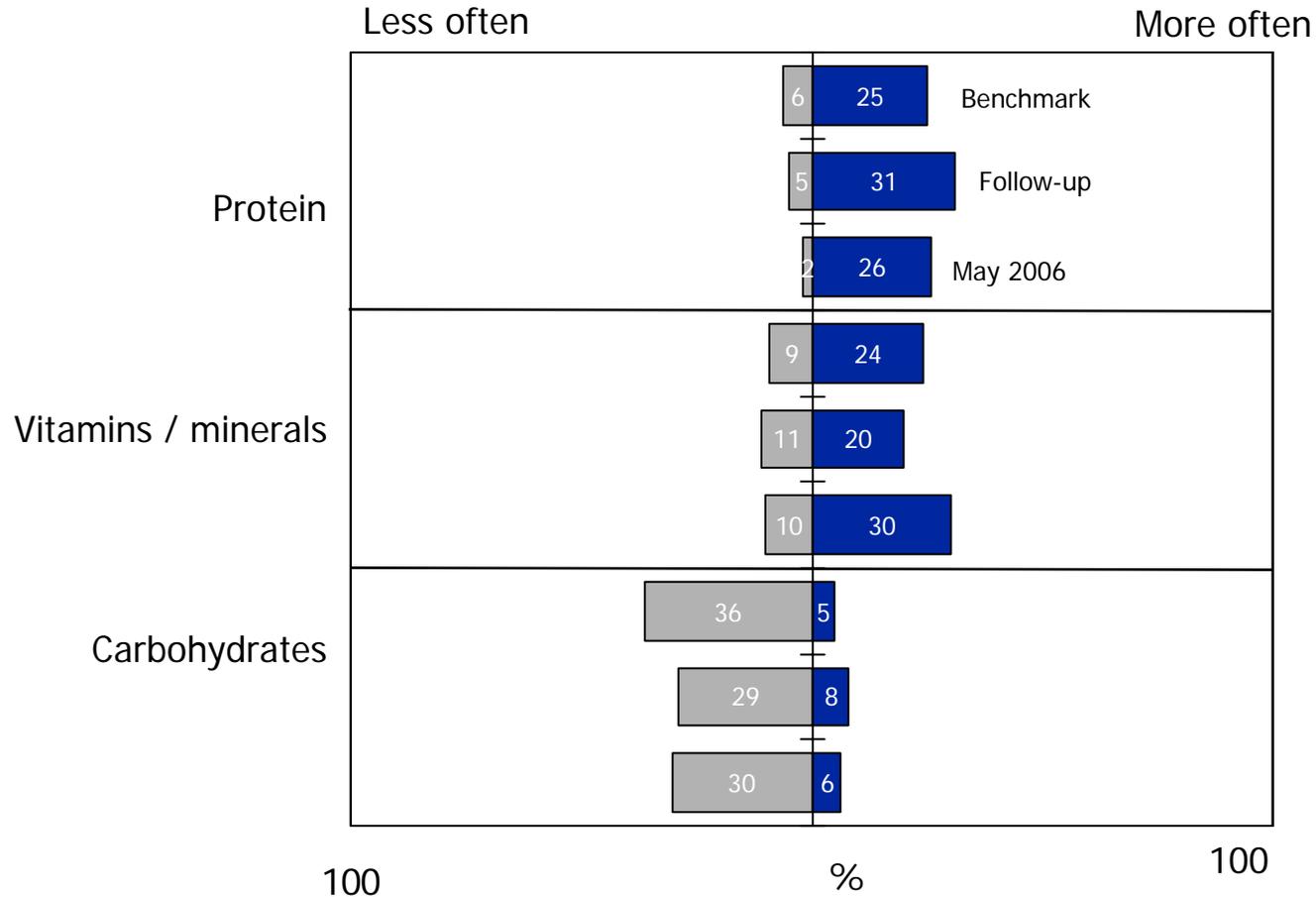
CHANGES IN RECOMMENDATION BEHAVIOUR

“For each of the following foods, please indicate whether you are recommending them to patients more often, less often, or with the same frequency as in the past?”



CHANGES IN RECOMMENDATION BEHAVIOUR

"For each of the following foods, please indicate whether you are recommending them to patients more often, less often, or with the same frequency as in the past?"



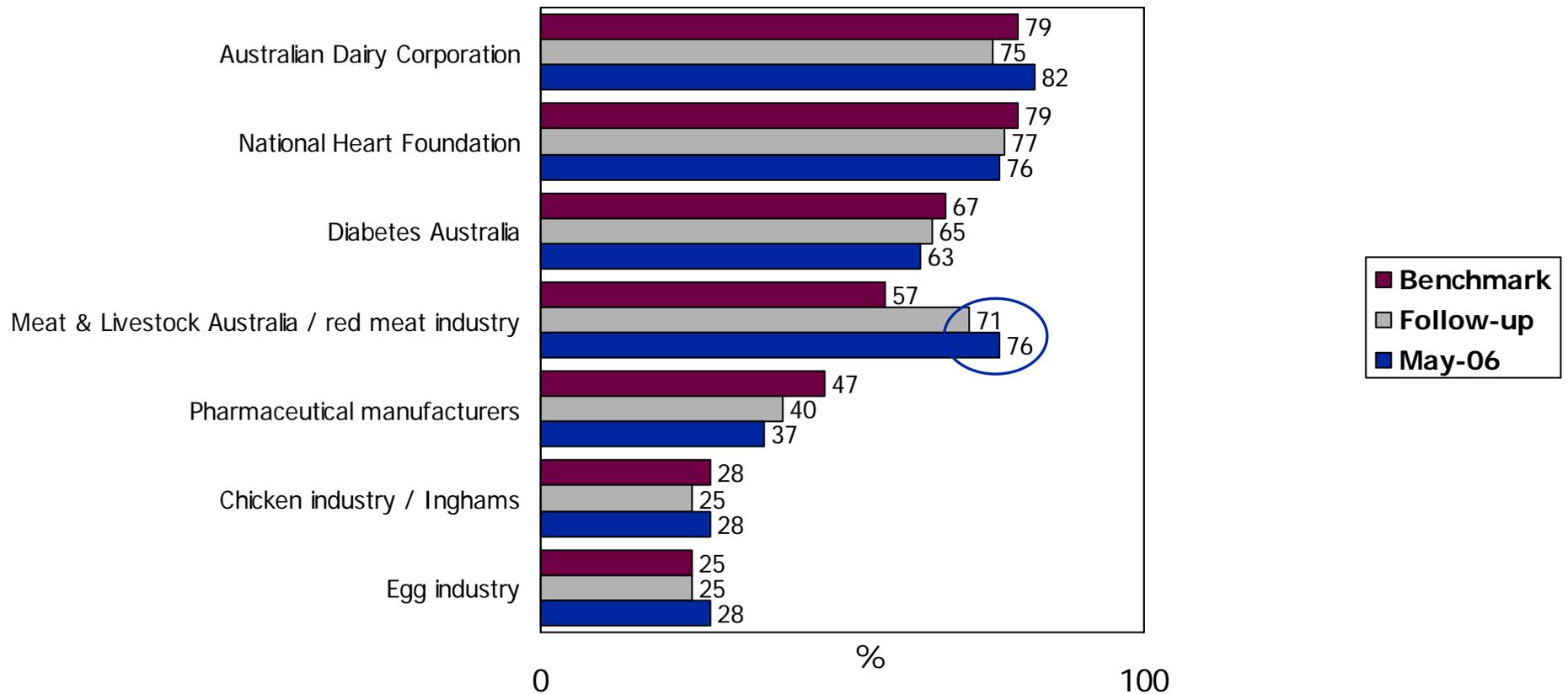
Base: All GPs, n=250

Less often More often

ORGANISATIONS

ORGANISATIONS

“From which of the following organisations do you recall having read or received information on diet and nutrition?”



Base: All GPs

INFORMATION FROM MLA

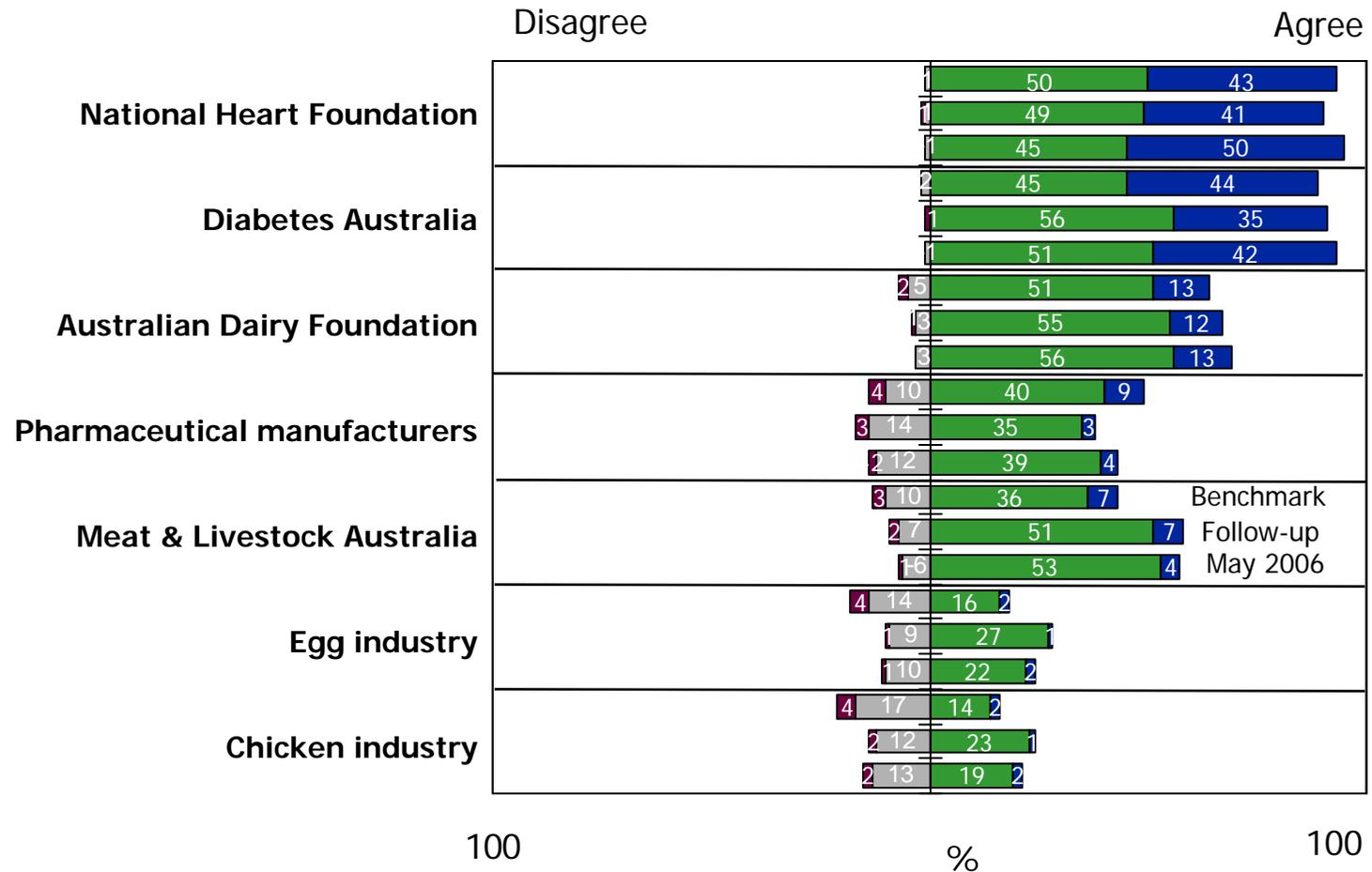
“What information do you recall having read or received from Meat & Livestock Australia or the red meat industry? What nutritional advice was it recommending you give to your patients?”

	Benchmark	Follow-up	May 2006
	%	%	%
Lean / red meat good for iron / good iron content	49	35	50
Lean / red meat is healthy / nutritious	25	20	14
Lean red meat is not high in fat	21	12	15
Eat more lean / red meat / include in diet	20	33	26
Eat red meat 3-4 times / week	15	18	30
Lean / red meat low in cholesterol / helps lower cholesterol	10	7	2
Lean / red meat is good source of protein	7	8	8
Lean / red meat good in moderation / small servings good	7	2	6
Lean / red meat is good source of vitamins	7	11	14
Recipes / best ways to cook red meat	6	6	1
Females should eat more lean / red meat	5	3	1
Lean / red meat is a good source of zinc	4	6	6
Include lean / red meat as part of balanced diet	4	2	6
Lean / red meat has more iron than spinach / green veges	3	1	1
Lean / red meat is good source vitamin B group	2	5	7
Other	2	14	7

Base: GPs receiving info from MLA

ORGANISATIONS

"they provide useful information and materials on diet and nutrition"



Base: All receiving information from each organisation



RED MEAT

FOODS FOR PROTEIN

“If you are recommending to a patient that they increase their protein intake, which specific foods, if any, do you recommend?”

	Benchmark	Follow-up	May 2006
	%	%	%
Fish	55	50	52
Lean meat (NFI)	38	44	46
Chicken / poultry	28	28	24
Lean red meat	25	31	26
Eggs / egg whites	22	18	23
Beans / chickpeas / legumes / lentils	18	19	19
Dairy / low fat dairy	16	10	11
Lean white meat	10	9	5
Nuts / cereals	9	12	12
Soy products	8	9	8
Do not recommend increase in protein	7	4	6
Vegetables	2	4	2
Protein supplements	2	3	2
Other	2	1	3

Frustrated 23%
Proactive 30%
Inactive 26%
Negative 23%

Base: All GPs

BENEFITS OF RED MEAT

“What do you believe are the main benefits to be derived from having red meat in the diet?”

	2003	2004	Benchmark	Follow-up	May 2006
	%	%	%	%	%
Iron/easily absorbed iron/ best source	93	84	93	87	89
Protein/good source of protein	71	67	50	61	50
Source of B ₁₂ vitamin	32	15	11	12	14
Source of vitamins	15	10	6	14	10
Minerals/zinc/magnesium	19	10	7	14	11
Tastes good/makes diet more palatable	9	8	6	5	3
Easy to prepare/can serve many ways	-	3	1	-	-
Omega-3 fatty acids	1	2	3	1	4
Filling/satiating macronutrient/helps control hunger	3	5	-	7	8
Good for energy levels/ source of energy	3	5	7	6	4
Low cholesterol/low in fat/ provides polyunsaturated fats	-	3	4	2	-
Other	9	4	2	5	6

Base: All GPs

DISADVANTAGES OF RED MEAT

“What do you believe are the main disadvantages or possible concerns of having red meat in the diet?”

	2004	Benchmark	Follow-up	May 2006
	%	%	%	%
Fatty or high in saturated fat	33	58	56	59
High cholesterol	-	22	27	22
Can be faddish / over represented / too much is unhealthy	18	-	-	-
Associated with bowel / breast cancer	9	20	25	29
Fatty if not trimmed	-	14	1	-
Depends on way it is cooked	-	11	10	6
Can lead to gout	9	3	1	3
Can contribute to overweight / obesity	4	2	3	4
May displace other nutrients / foods	2	8	7	-
Too many calories	1	2	1	5
Low in fibre	-	4	3	4
Cardiovascular conditions / hypertension	-	3	2	4
Cost	-	1	3	2
Nothing: no disadvantages	16	3	5	6

Base: All GPs

ATTITUDINAL STATEMENTS

	May 2002	May 2003	May 2004	Benchmark	Follow-up	May 2006
	%	%	%	%	%	%
High protein low fat diet worth considering for overweight	-	73	76	77	83	79
Nutrients in lean red meat make it essential part of a balanced healthy diet	90	84	86	83	83	81
Red meat a source of protein, iron, zinc, vitamin B ₁₂	92	89	95	86	92	92
Red meat should be eaten 3-4 times per week	73	69	67	70	71	68
Lean red meat should be included for cholesterol patients	71	76	75	70	78	73
Lean red meat satiates, should be part of obesity management	75	70	71	62	73	65
Evidence indicates that CRC is not linked to red meat	39	43	41	36	36	36
Red meat cuts are not a major source of fat, or cholesterol	45	38	35	38	44	36
Most of the meat we buy in Australia today is lean	31	29	38	29	43	29

Base: All GPs

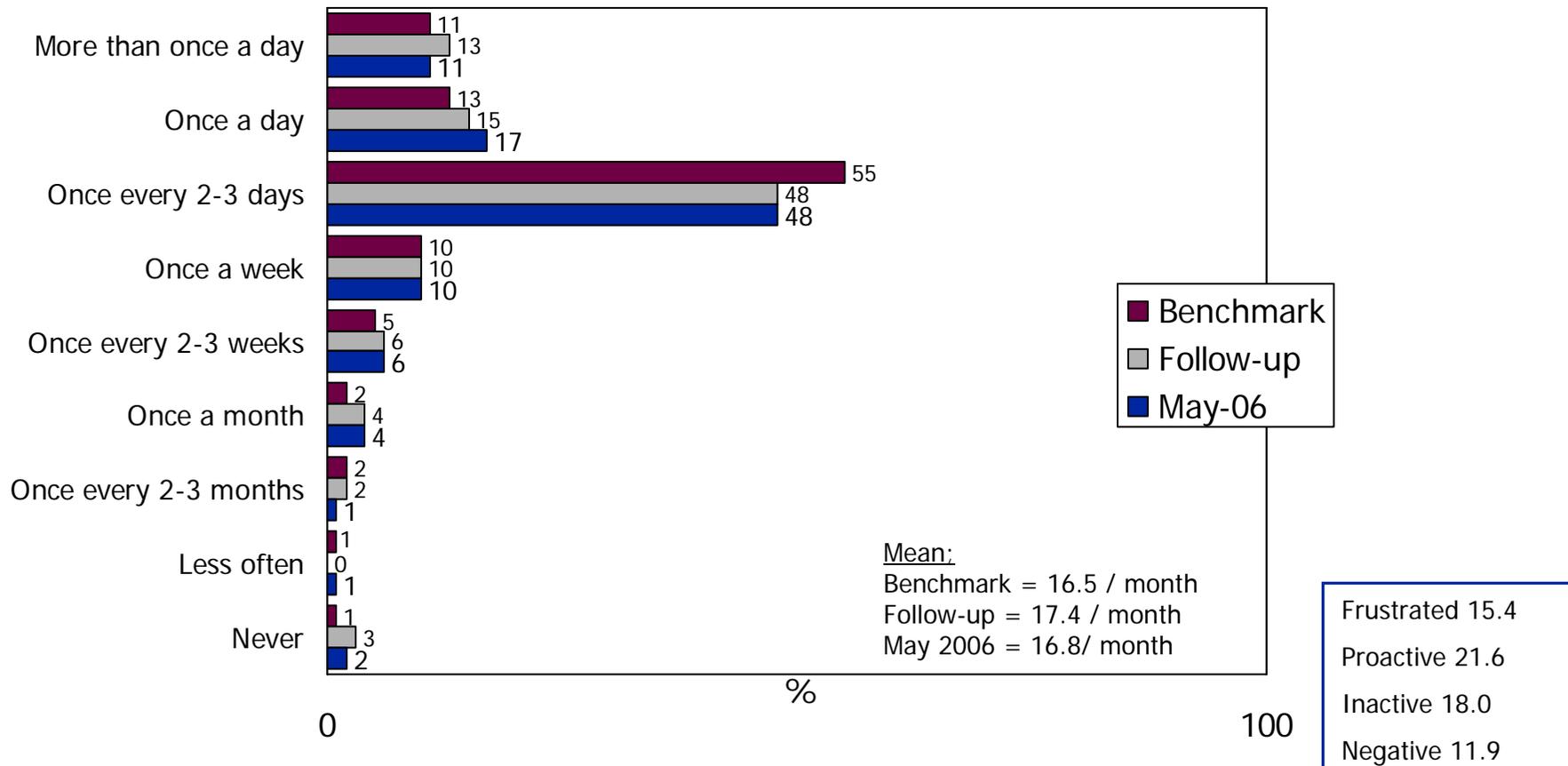
ATTITUDINAL STATEMENTS

	May 2006
	%
Lean red meat helps reduce the urge to overeat	60
Lean red meat should be included in the diet of Type II diabetics	82
Red meat played a key role in the evolution of humans	58
Red meat is essential for a healthy mind	57

Base: All GPs

FREQUENCY OF GPs MAKING RECOMMENDATIONS

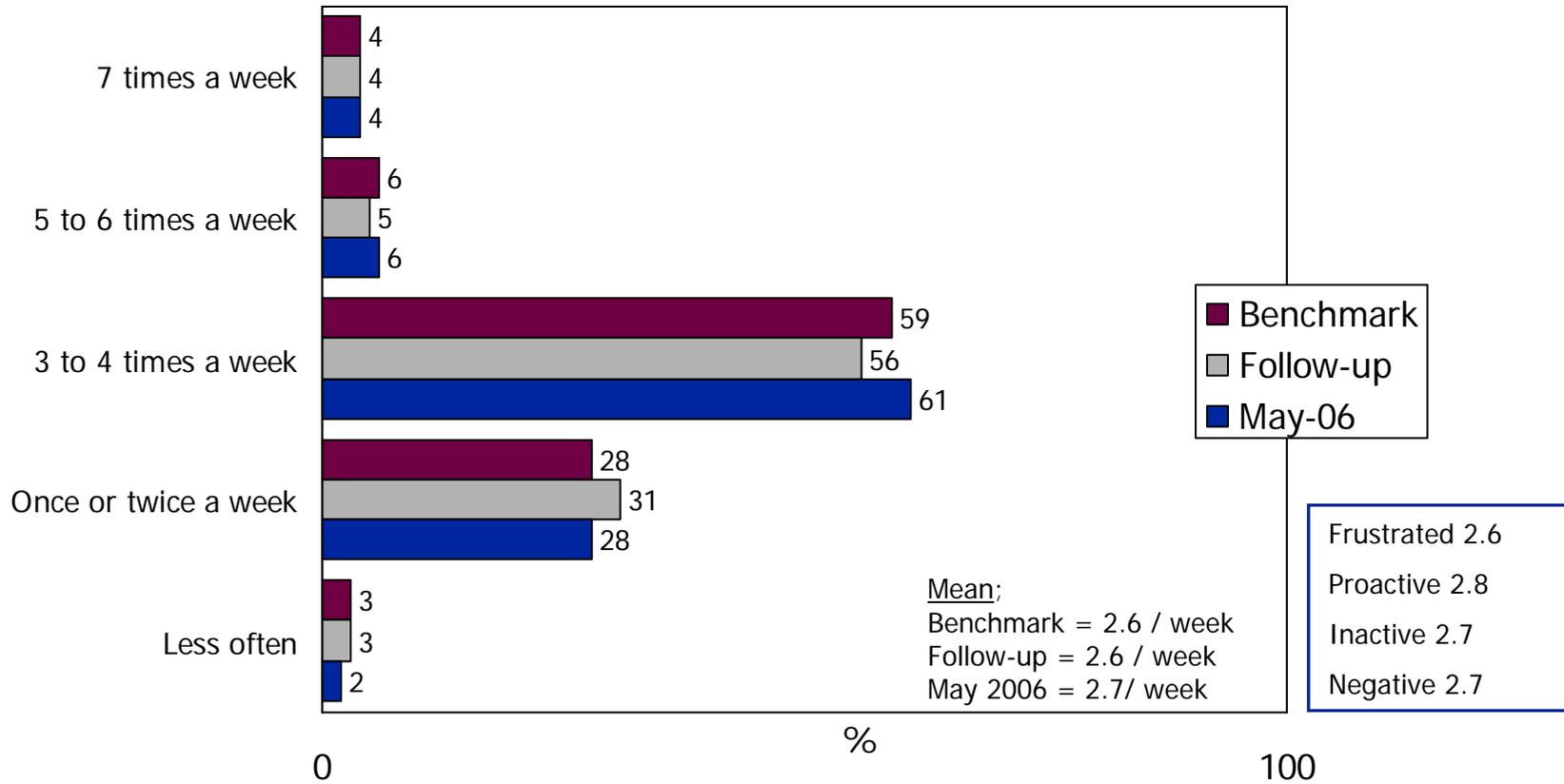
“How often do you make recommendations to a healthy adult patient about the amount or type of red meat that should be in their diet?”



Base: All GPs

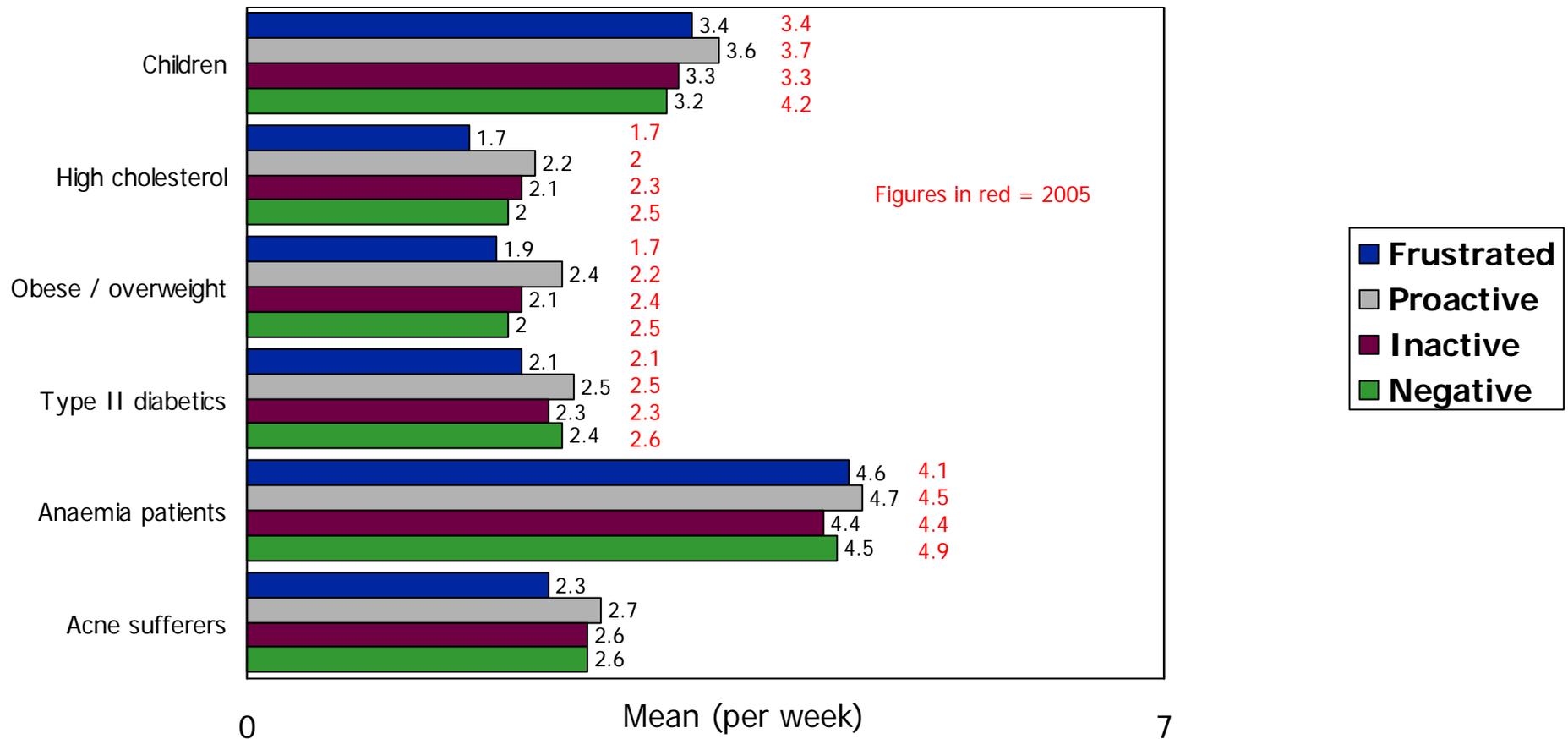
FREQUENCY OF EATING

“How often do you recommend healthy adults should eat red meat?”



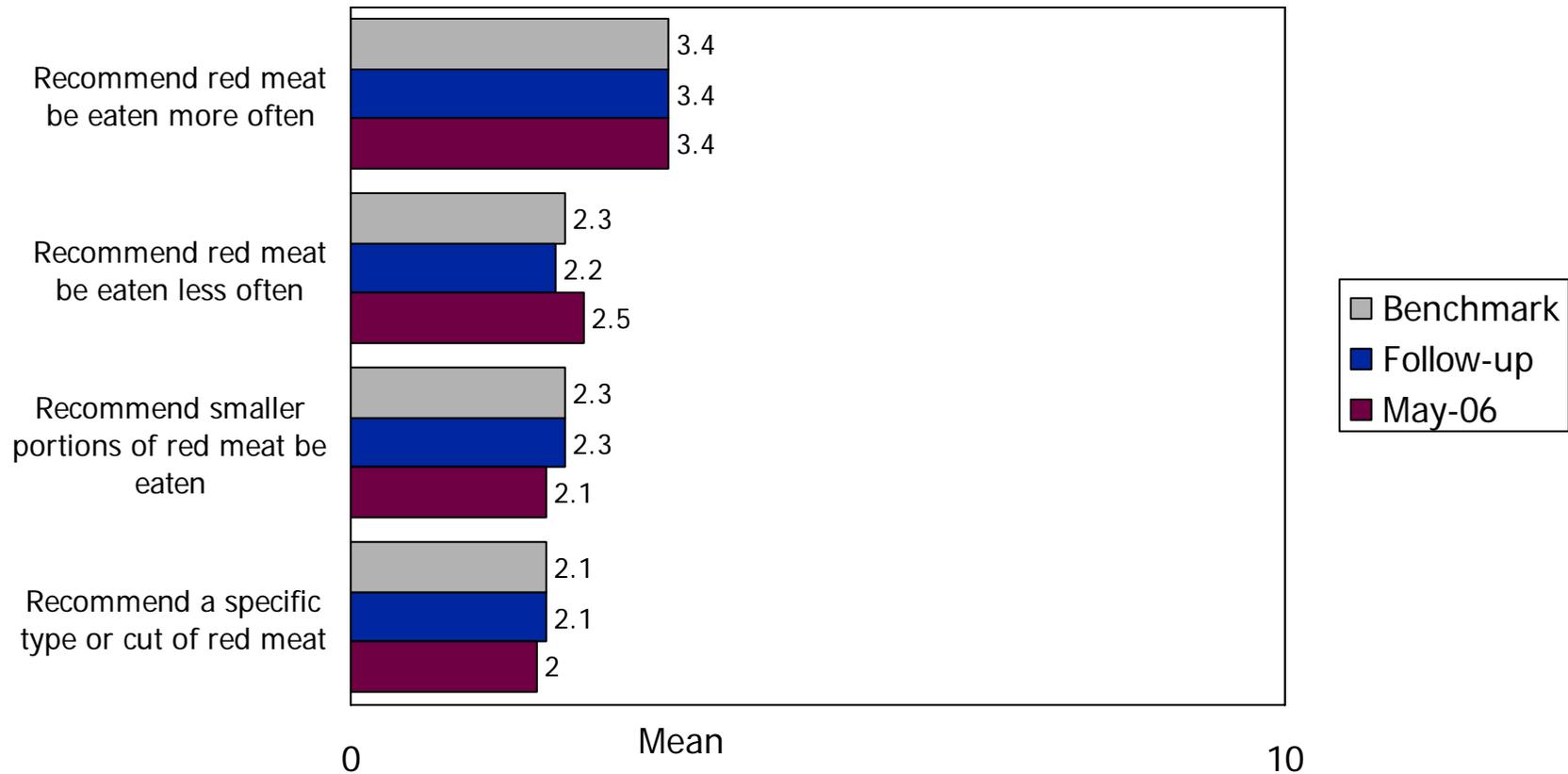
FREQUENCY OF EATING

"How often do you recommend red meat be eaten by the following patient groups?"



NATURE OF RED MEAT RECOMMENDATION

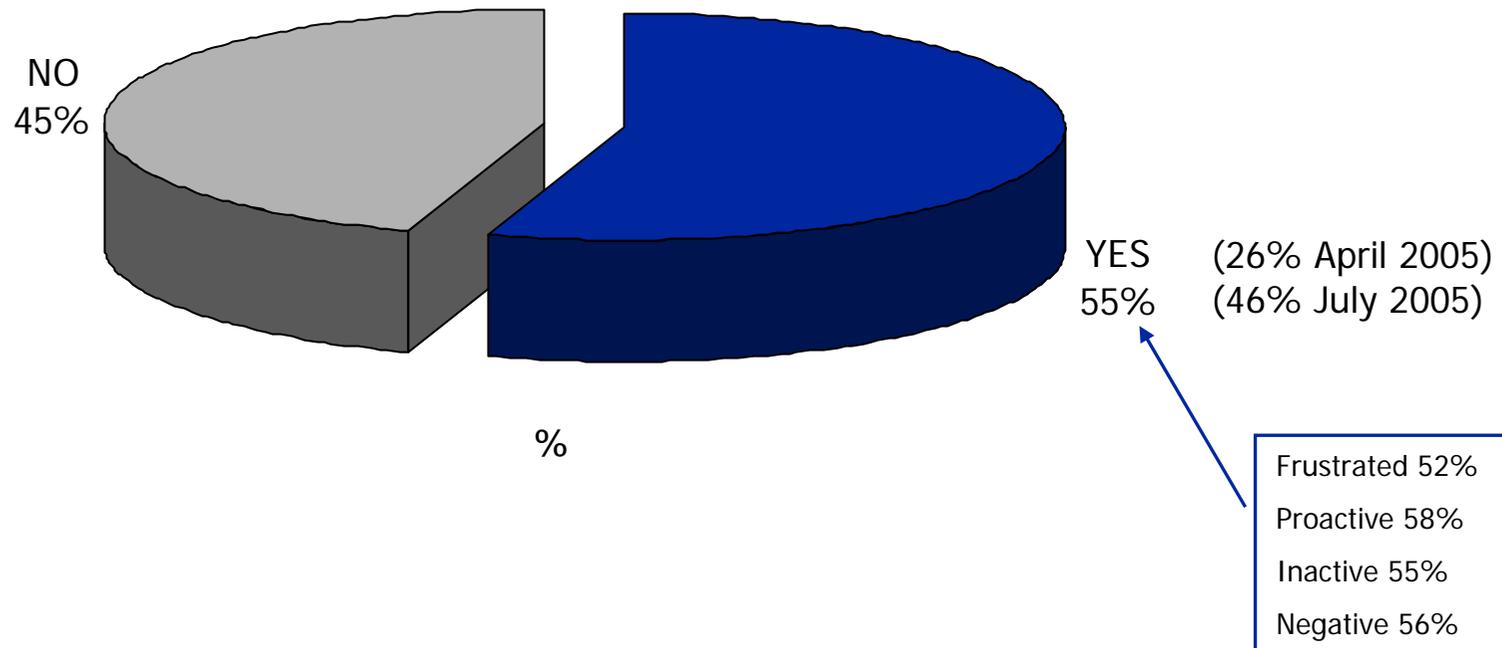
“Out of the last, say, 10 occasions where you have made recommendations to a patient about their intake of red meat, on how many of those 10 occasions did you do each of the following?”



ADVERTISING

RED MEAT ADVERTISING RECALL

"Do you recall having seen any advertising recently in medical journals or medical newspapers about red meat?"



Base: All GPs

READ MEAT ADVERTISING RECALL

“Can you please write in everything that you remember about the last advertisement you saw in medical journals or newspapers for red meat?”

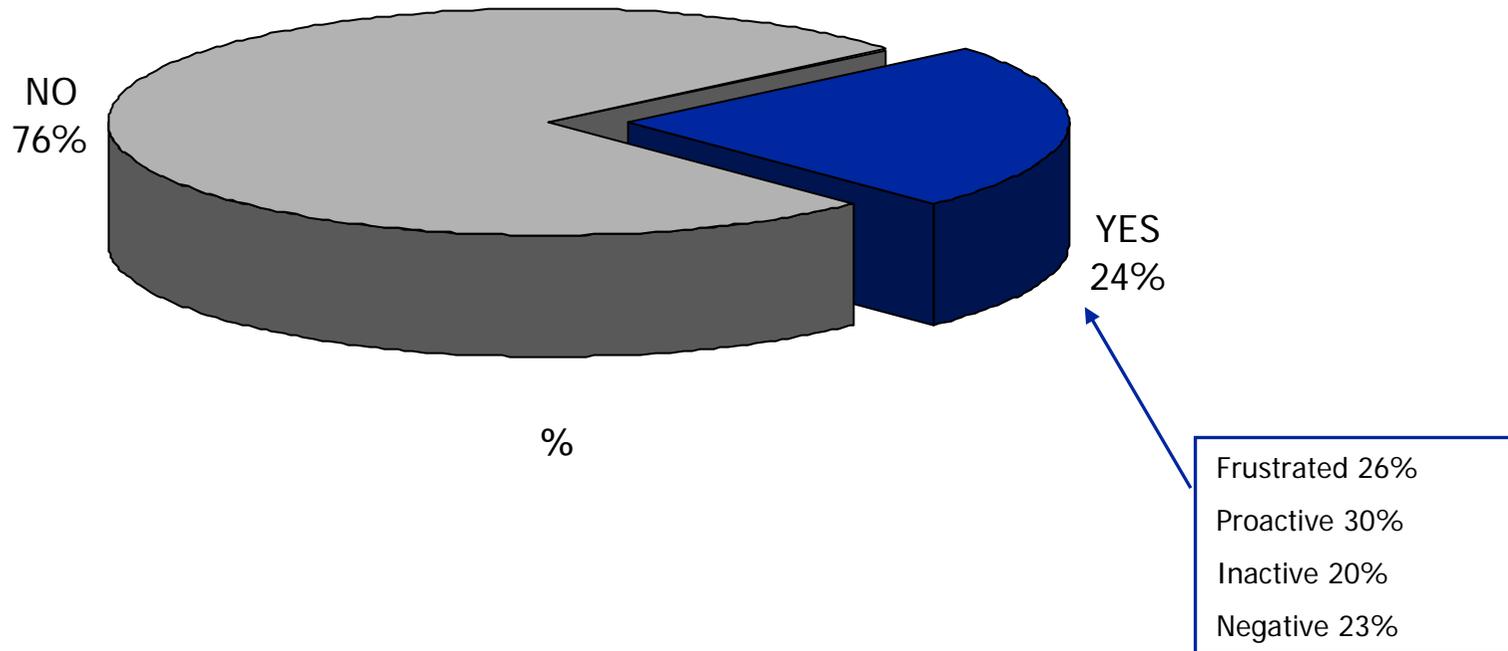
	Benchmark (n=65)	Follow-up (n=115)	May 2006 (n=138)
	%	%	%
Good for iron / high iron content in red meat	31	28	28
Lean cuts are low in fat / healthy	-	19	12
Red meat healthy / good for you	20	14	11
Small piece of red meat on a white plate	17	7	4
Good source protein / lean protein	-	7	7
Pictures of red meat	-	9	12
Red meat is low in fat	15	6	5
Eat more red meat	14	1	5
Butchers dancing / leaping for joy	11	4	3
Red meat good source of vitamins / minerals	8	19	9
Red meat should be part of a balanced diet	-	-	7
Eat red meat 3-4 times / week	6	14	13
Red meat low in cholesterol	6	3	4
Red meat gives you energy	5	3	4

Base: GPs recalling red meat advertising

AD RECOGNITION

Meat Skewer

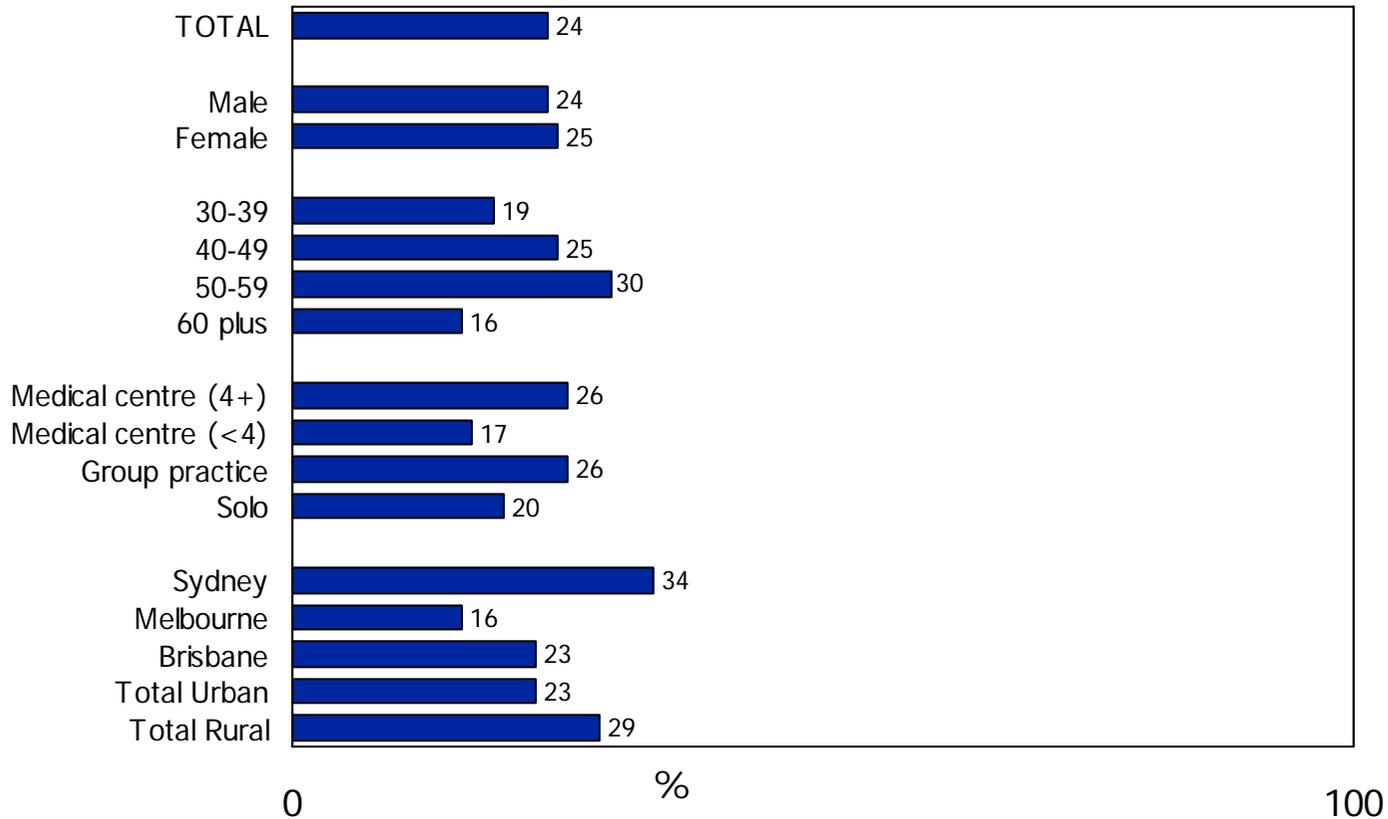
"Do you recall having seen this advertisement?"



Base: All GPs, n=250

AD RECOGNITION

Meat Skewer

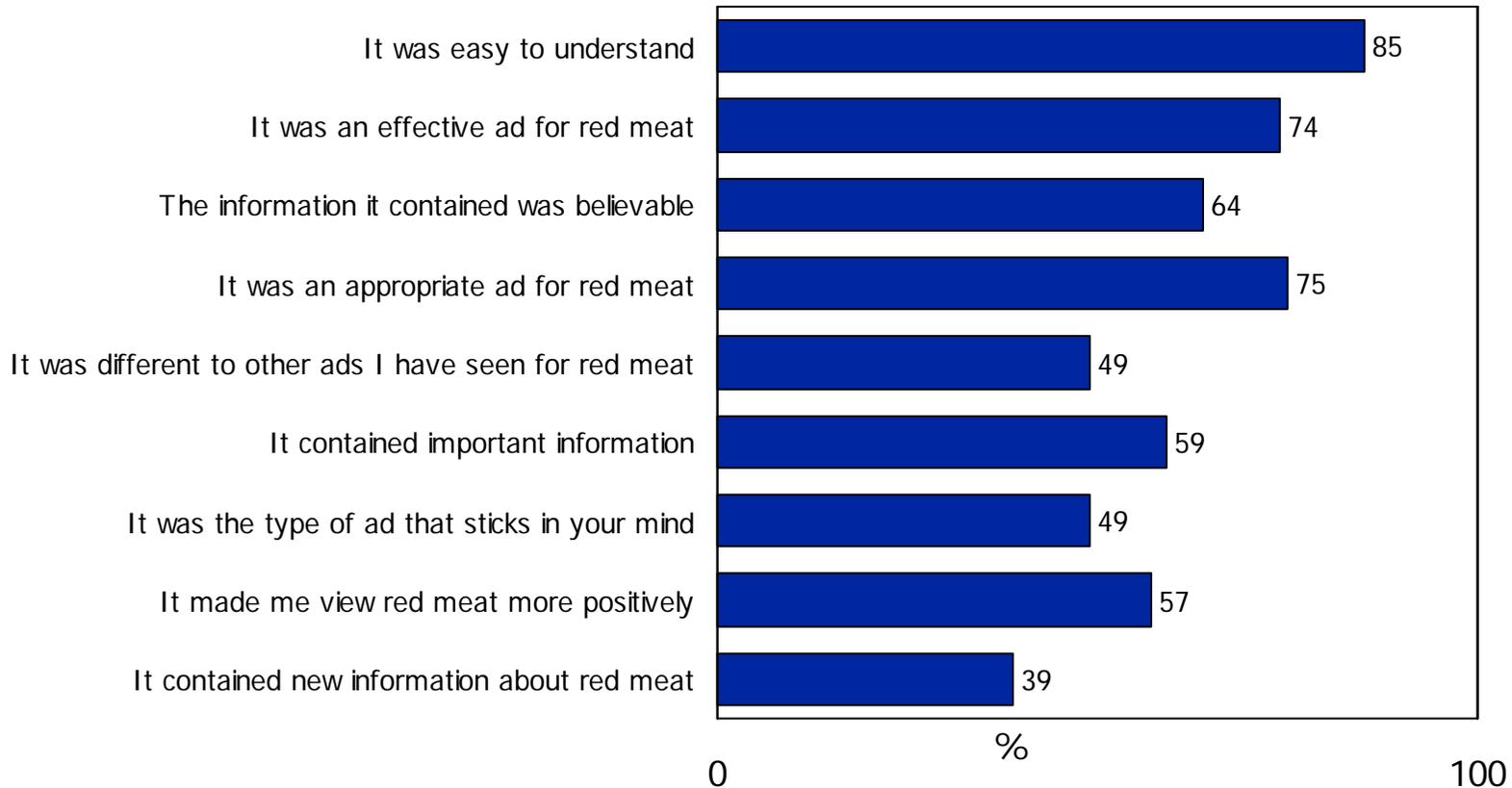


Base: All GPs, n=250

ADVERTISING DIAGNOSTICS

Meat Skewer

“Which of the following statements do you believe apply to this advertisement?”

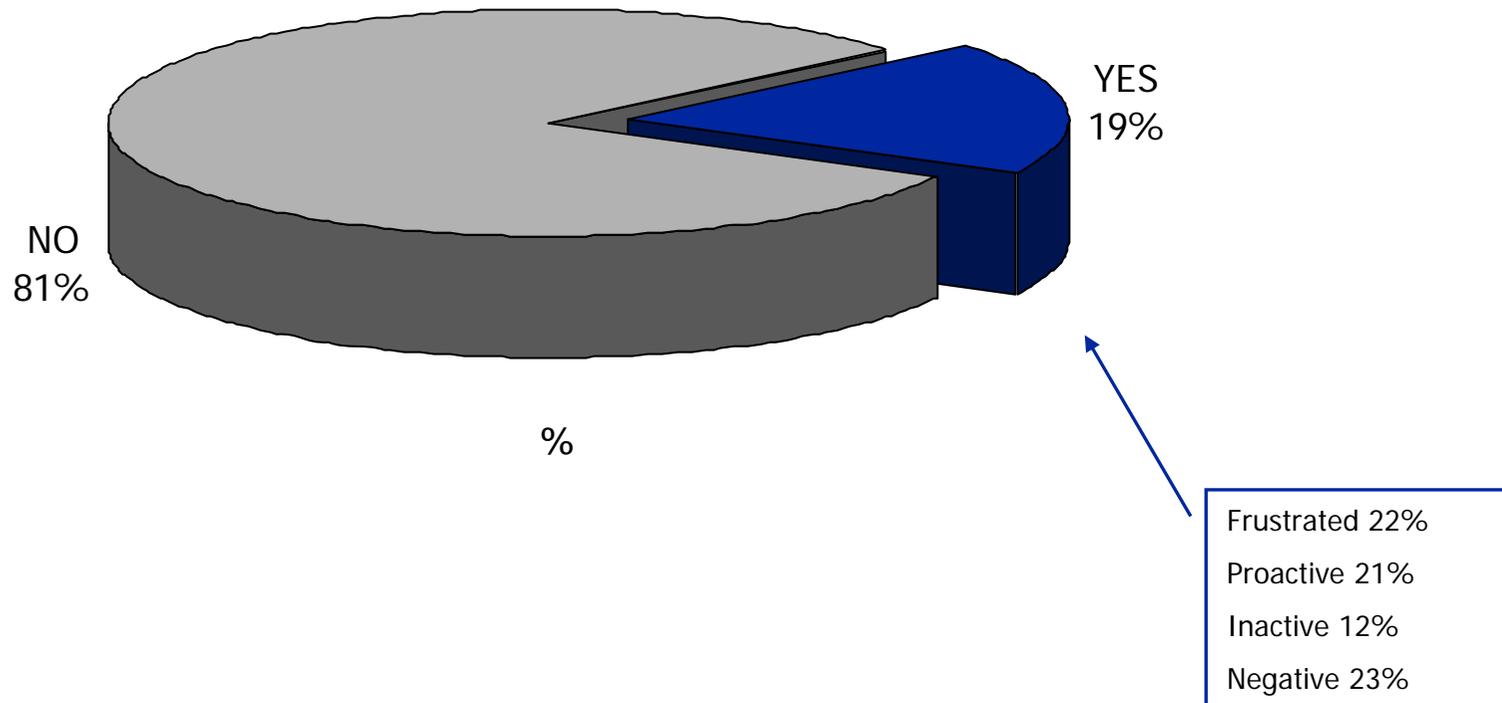


Base: All GPs recognising Meat Skewer ad, n=61

AD RECOGNITION

Patch

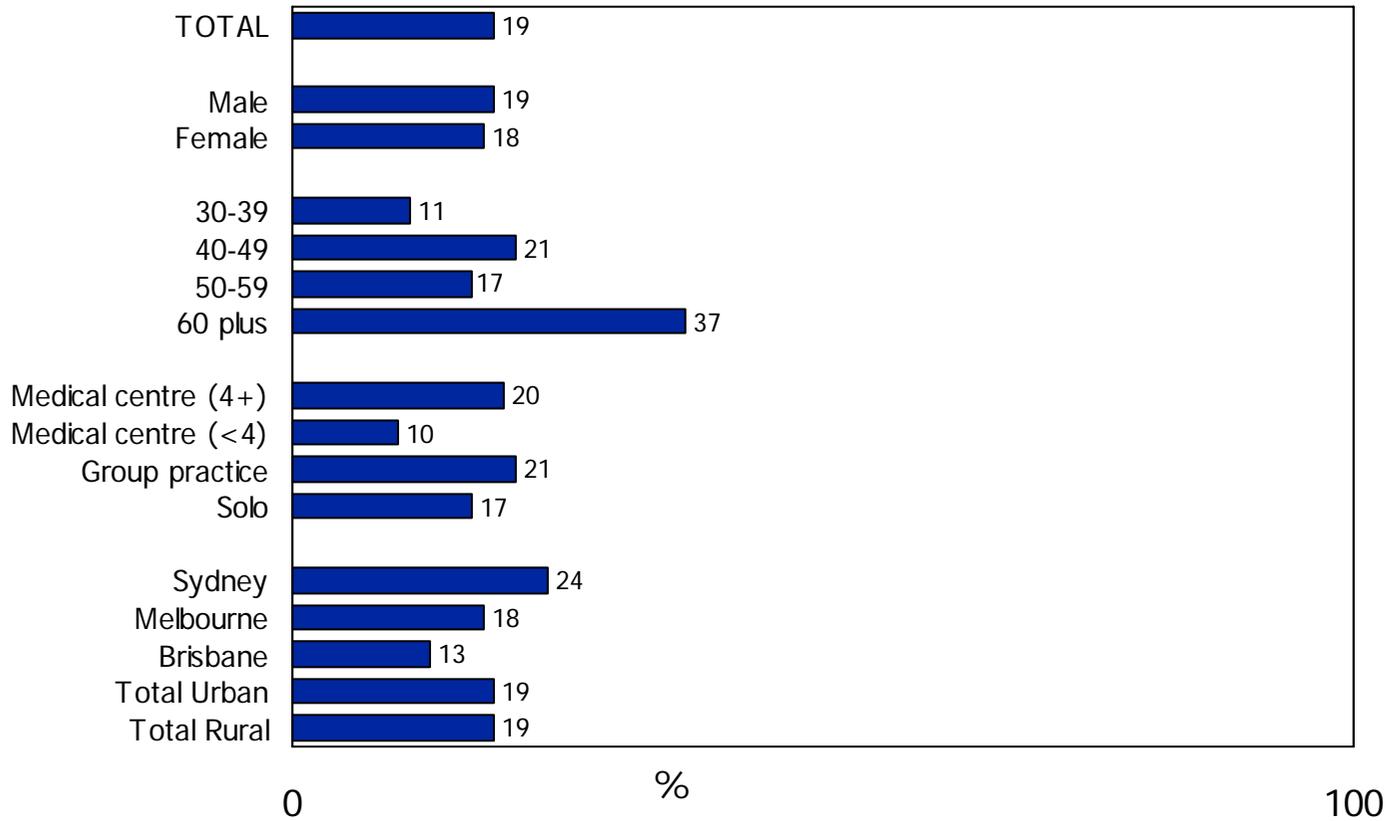
"Do you recall having seen this advertisement?"



Base: All GPs, n=250

AD RECOGNITION

Patch



Base: All GPs, n=250

MAIN MESSAGE RECALL

Patch

“What was the main thing this advertisement was trying to tell you about red meat?”

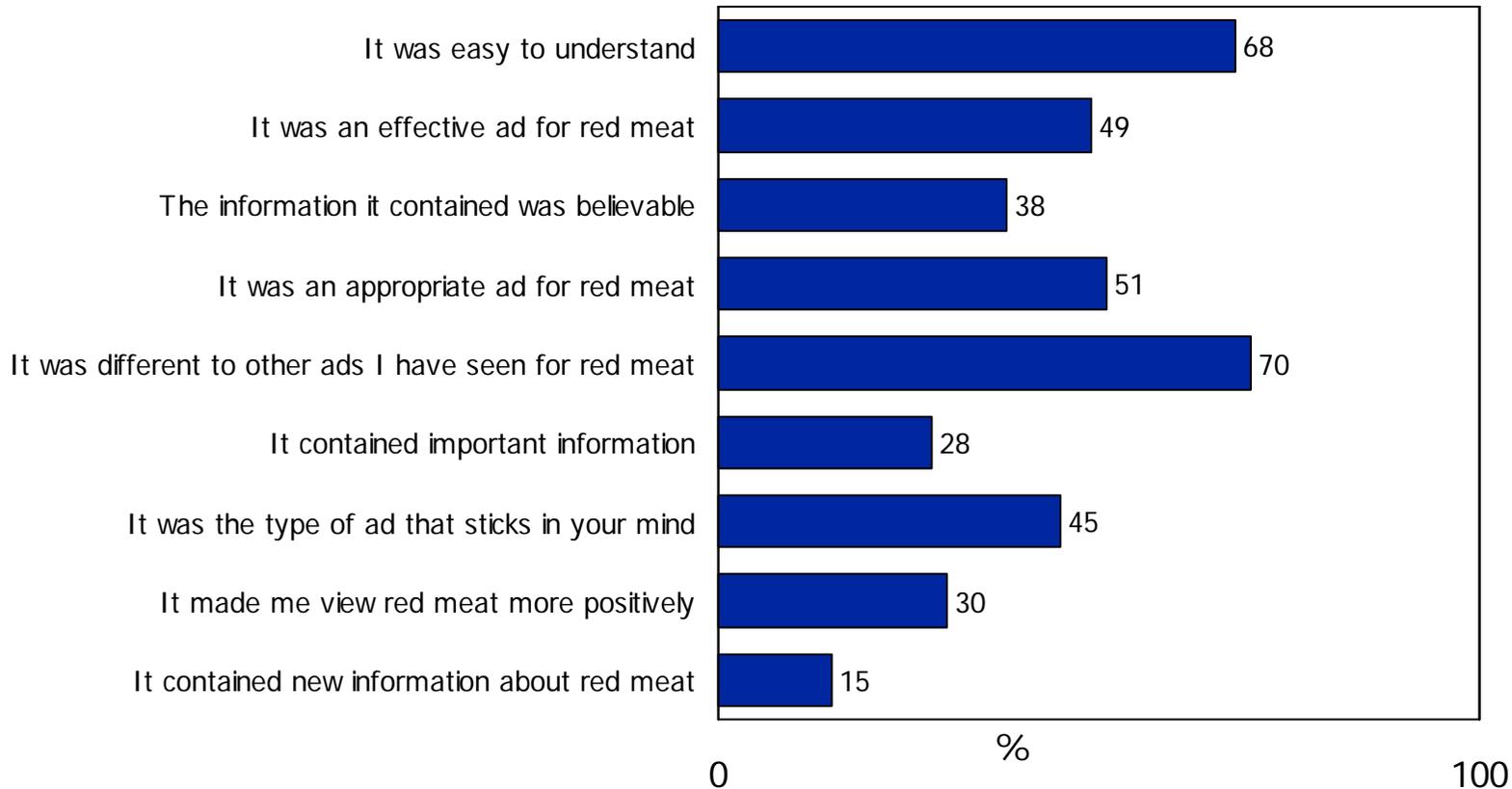
	Recognising Patch
	%
Meat is very satisfying/ reduces the urge to overeat	23
Keeps you in good health	21
Good to eat 2-4 times per week	19
Red meat helps with weight loss	17
Eat 150g of meat	15
Good nutritional value	9
Good source of iron	9
Good to eat in moderation	6
Other	4
Don't know	9

Base: All recognising Patch ad, n=47

ADVERTISING DIAGNOSTICS

Patch

“Which of the following statements do you believe apply to this advertisement?”

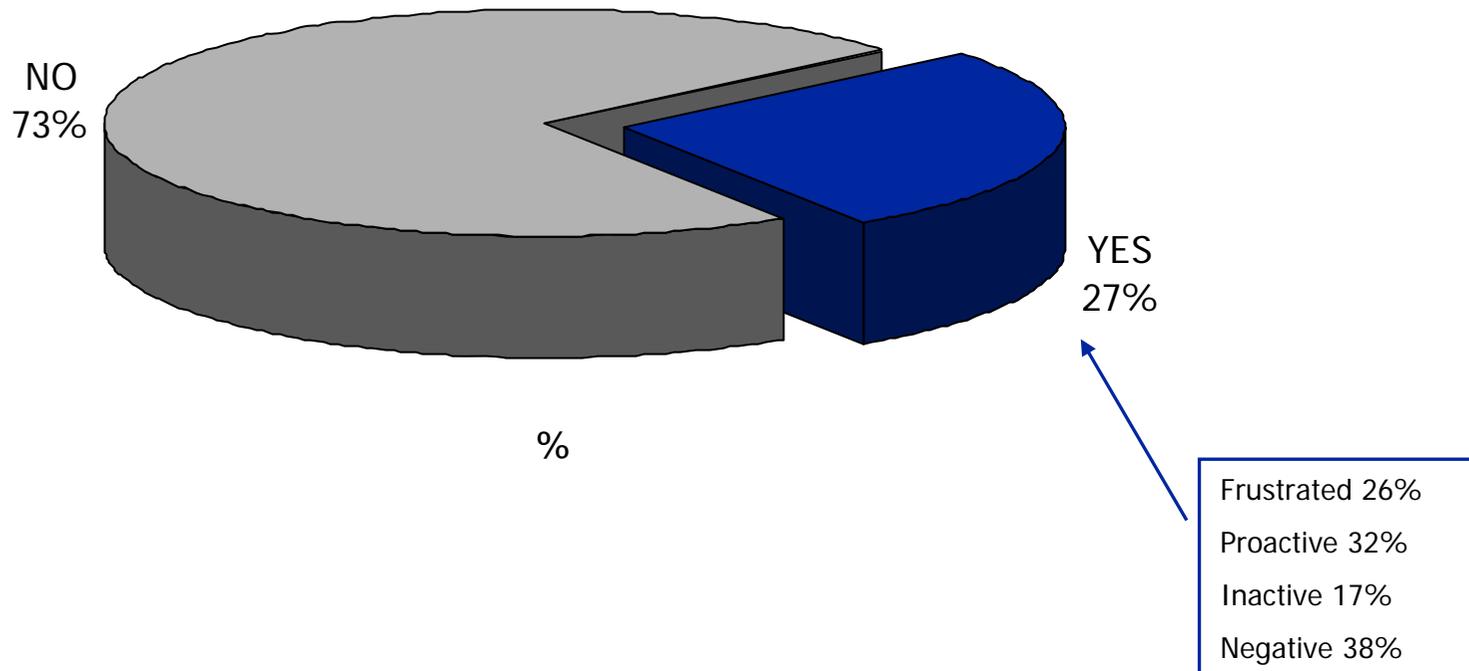


Base: All GPs recognising ad, n=47

AD RECOGNITION

Cave 1 (Instincts)

"Do you recall having seen this advertisement?"

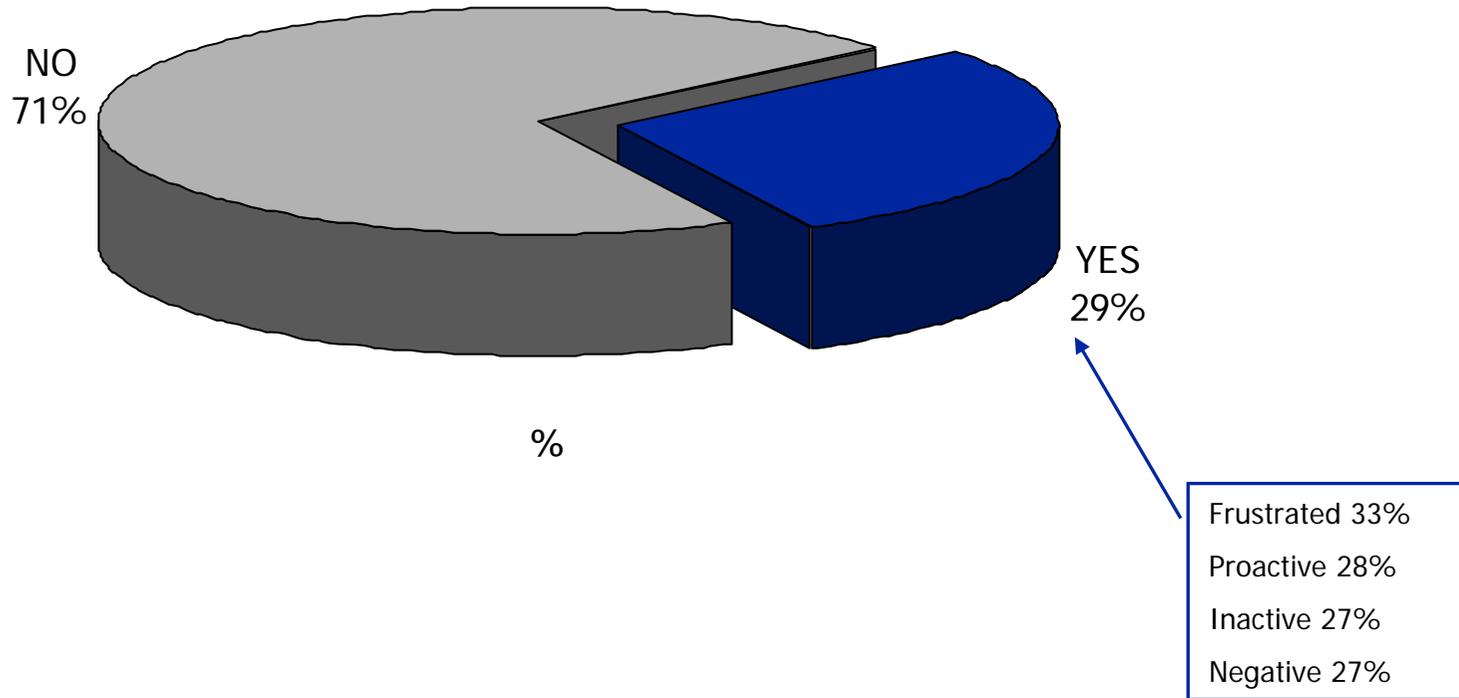


Base: All GPs in sample A, n=73

AD RECOGNITION

Cave 2 (Before carbs)

"Do you recall having seen this advertisement?"

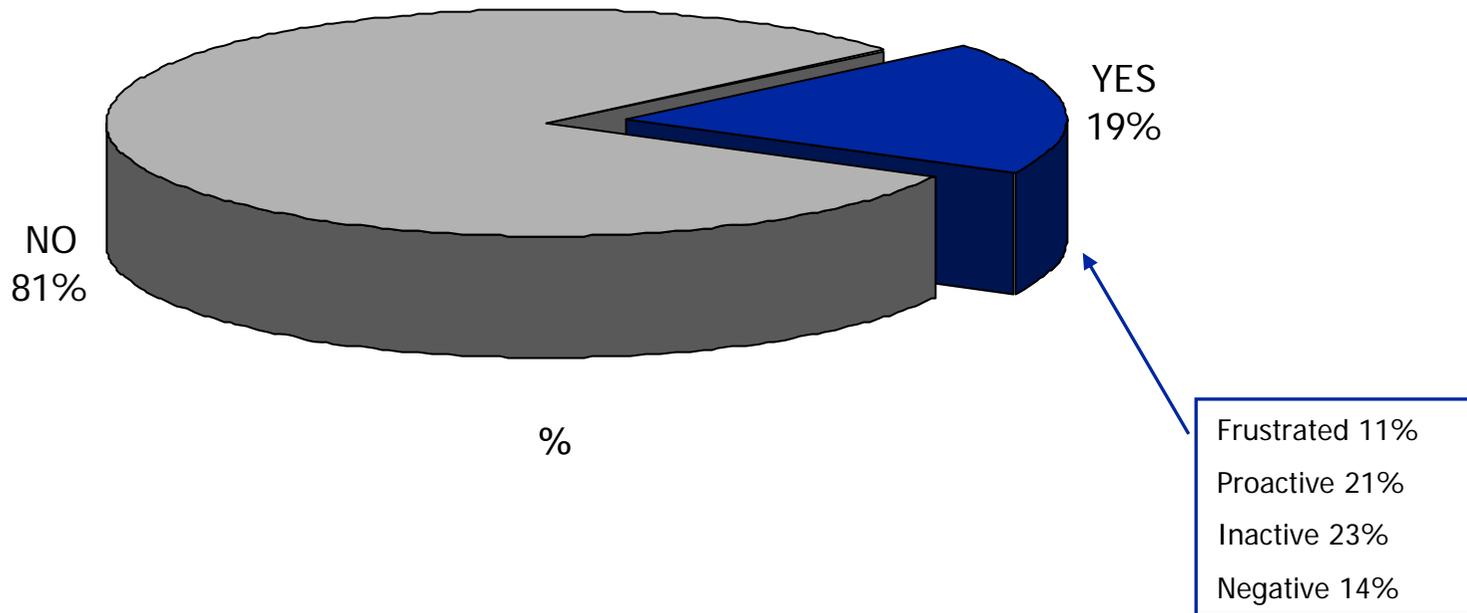


Base: All GPs in sample B, n=73

AD RECOGNITION

Cave 3 (Hands)

"Do you recall having seen this advertisement?"



Base: All GPs in sample C, n=73

MAIN MESSAGE RECALL

Cave Ads

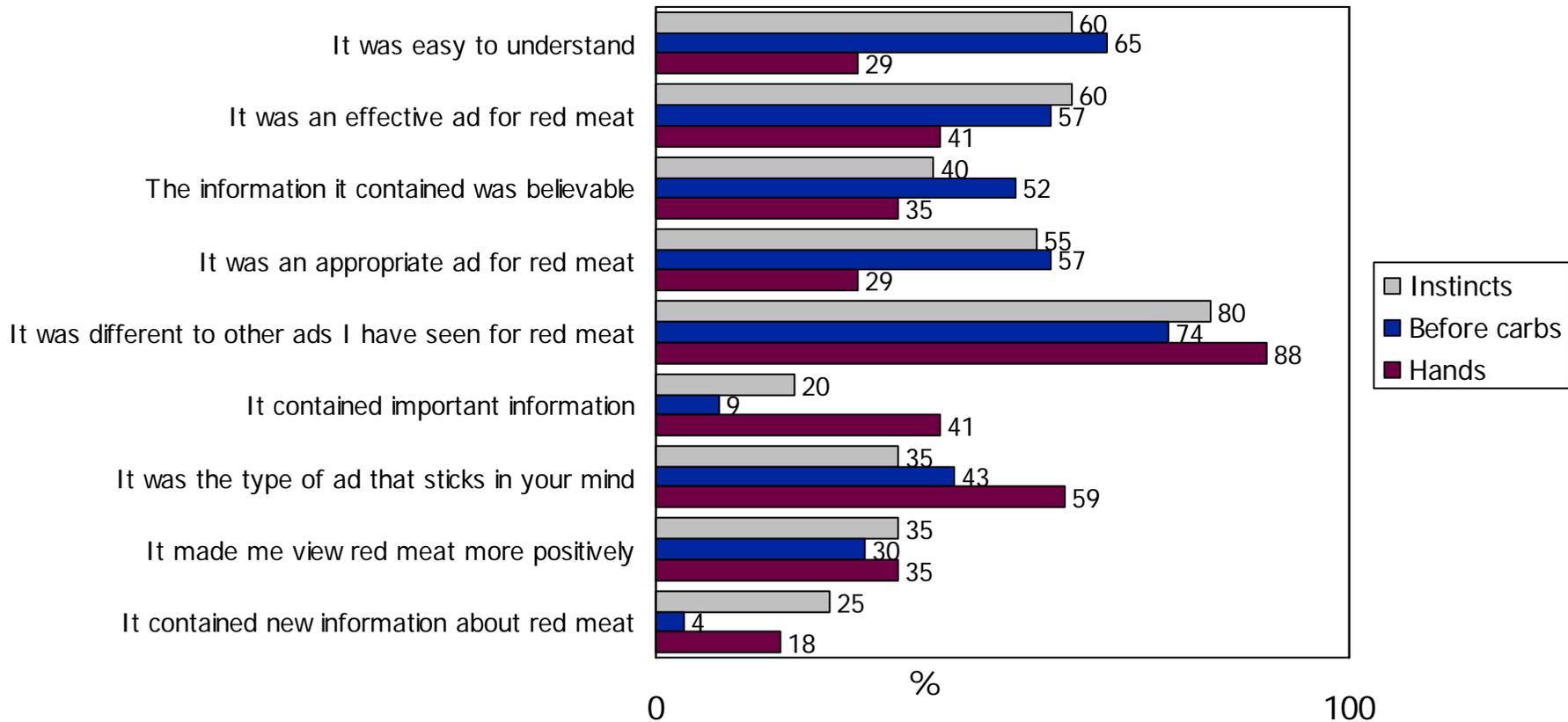
“What was the main thing this advertisement was trying to tell you about red meat?”

	Recognising Cave 1 (Instincts)	Recognising Cave 2 (Before carbs)	Recognising cave 3 (Hands)
	(n=20) %	(n=23) %	(n=17) %
Red meat eaten throughout history	50	57	24
Red meat is main food source/ staple diet	30	17	-
Normal/ natural to eat red meat	25	17	6
Good for you/ keep you in good health	25	9	-
Red meat helped us evolve	20	17	29
Good to eat 3-4 times per week	10	-	-
Good source of omega 3	10	-	-
Good source of iron	10	-	-
Important for brain development	-	9	41
Children need red meat for development	-	-	18
Red meat helps with weight loss	-	13	-
Don't know	-	4	6

ADVERTISING DIAGNOSTICS

Cave Ads

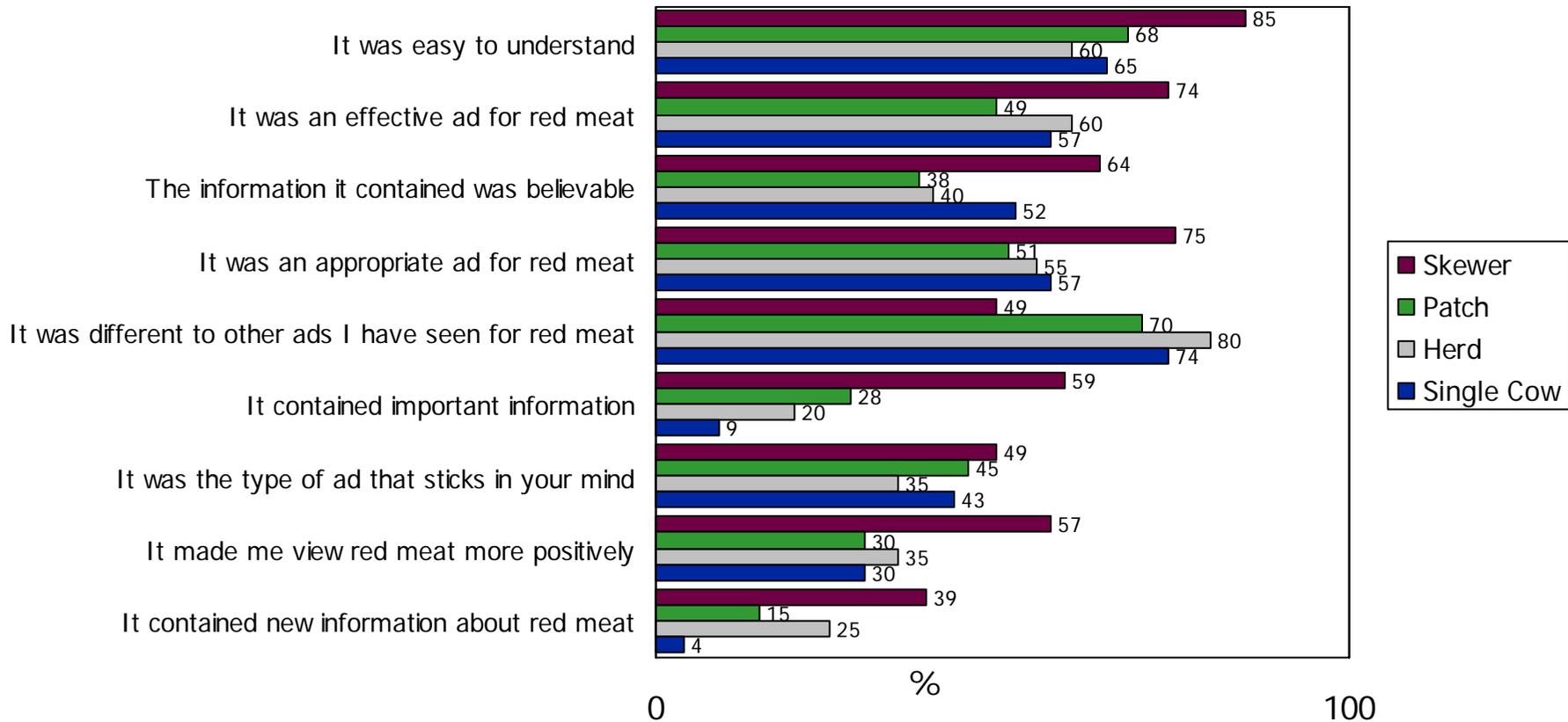
"Which of the following statements do you believe apply to this advertisement?"



Base: Herd n=20, Single Cow n=23, Hands, n=17

ADVERTISING DIAGNOSTICS

“Which of the following statements do you believe apply to this advertisement?”



Base: Herd n=20, Single Cow n=23, Hands, n=17

SUMMARY OF FINDINGS

SUMMARY OF FINDINGS

- ❑ Spontaneous advertising recall for dietary / nutritional advice has increased over the last year – though most of this increase is due to unaided recall of nutrient advertising, with a slight decrease in spontaneous recall for meat advertising

- ❑ Further, there has been a decrease (21% to 16%) in the proportion of GPs spontaneously playing back “include red meat” as advice they provide to healthy adults. The same advice given to patients with high cholesterol has remained stable (at 13%).

- ❑ As was the case in 2005, fish continues to be the most frequently nominated food when an increase in protein is required.

- ❑ The suspected association between red meat and bowel cancer has eased marginally (not significantly) from that recorded in July 2005.

SUMMARY OF FINDINGS

- ❑ Messages recalled from MLA communication have strengthened with regards to mentions of eating red meat 3-4 times per week and red meat being a good source of vitamins and continue to outweigh mentions of iron benefits (though salience of this message has increased).
- ❑ Attitudinally, GPs are largely unchanged since the Follow-up research in 2005
- ❑ Though some of the gains that were seen in July have declined slightly with GPs now less likely to feel that most of the meat we buy in Australia is lean and slightly more likely to believe that red meat cuts are a major source of fat/ cholesterol.
- ❑ We have not observed any shifts in behaviour over the last year. GPs make recommendations about red meat with broadly the same frequency as they did in April 2005. Further, there have not been any notable increases in children, the overweight or those with high cholesterol.

SUMMARY OF FINDINGS

- ❑ The proportion of GPs who recall seeing advertising in medical journals about red meat recently has continued to increase and now stands at 55% (from 46%)

- ❑ Though not by any significant margin, the 'Cave' campaign and, more specifically, the 'Herd' and 'Single Cow' executions appears to have had the highest cut-through (27% and 29% respectively).

- ❑ However, it is the 'Skewer' ad, with 24% recall, that performs best on all the diagnostic measures bar 'it is different to other ads I have seen for red meat'.

- ❑ "Patch" has a low level of recall (19%)