

evaluationseries |

2.2 Enhancing the
nutritional reputation
of red meat



Red meat nutrition marketing

The industry impact

PROMISE

Sustain domestic demand for red meat; research the impact of red meat diets on health and wellbeing.

DEFINITIONS

Red meat Beef, lamb and mutton.

Public health outcome Effect of research that addresses priority public health conditions.

Health care professionals (HCPs) General practitioners and dietitians.

Higher protein diet Low fat, protein-plus diet (25 per cent of dietary energy from protein).

CSIRO Total Wellbeing Diet (TWD) Evidence-based, higher protein, low fat eating plan developed by CSIRO (partially funded by MLA R&D).

Dietitians Association of Australia (DAA) Leading nutrition organisation in Australia representing the dietetic profession.

Heart Foundation Australian charity; funds cardiovascular research and provides heart health information.

Human Nutrition Research Advisory Committee Committee comprising industry and academic representatives.

Key opinion leaders Experts, health and nutrition organisations.

BACKGROUND

Meat & Livestock Australia (MLA), as the service provider to the Australian red meat industry, strives to build demand, improve access to global markets, develop a competitive advantage from 'paddock to plate' and, by partnering with industry, build capability.

Remaining accountable to stakeholders and providing quantifiable returns on government and industry investment are central to demonstrating performance against these goals.

In 2005 MLA engaged the Centre for International Economics (CIE) to conduct an independent review, and to develop an effective evaluation framework* for assessing the impact of its programs and their compliance with government priorities.

The framework provides independent estimates of the net benefits of MLA programs – including achievements relative to targets and industry benefits relative to a situation where the MLA program did not exist.

It also provides for interactions between the meat and livestock sectors and wider Australian economy, allowing national benefits to be measured. These benefits are not only economic, but also environmental and social, thereby supporting a rigorous triple bottom line evaluation of MLA initiatives.

* MLA's evaluation framework is explained in full in the booklet, *Why does MLA need a framework for independent evaluation?*, that accompanies the MLA program evaluation series.

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Where we started

Red meat misconceptions, particularly surrounding its health proposition, were rife throughout Australia in the 1980s and 1990s, undermining community and industry confidence which resulted in a steady decline in consumer demand and market share.

Despite Australian Meat and Live-stock Corporation's (AMLC) 'Iron' campaign in the early 1990s, market research indicated that between 1997 and 1999, negative attitudes towards red meat had risen again from 43 to 56 per cent, restraining consumption frequency and demand.¹

A further study in 2000 showed that 62 per cent of female meal providers believed they should limit red meat consumption to avoid potential health issues.²

A strategic response

Developed in partnership with nutrition experts and industry peak councils – the Australian Lot Feeders' Association, the Cattle Council of Australia, the Sheepmeat Council of Australia and the Australian Meat Industry Council, MLA's Nutrition program responded by integrating scientific research; consulting with key opinion leaders and industry to ensure message accuracy and support; and developing effective communications to drive attitudinal change and shift consumption behaviour.

SCIENCE

- Foundations of evidence-based information

OPINION LEADERS

- Effective consultation to achieve consistency and support in public health messages

HEALTH CARE PROFESSIONALS

- Communication to support public health policy

CONSUMERS

- Communication to strengthen perception of the importance of red meat in a healthy diet

¹ Dangar Tracking Study 1997 & 1999, *Red Meat Consumer Impression Points Summary*

² Sweeney Research 2000, on behalf of the Australian Dairy Corporation

³ CIE 2008

PROGRESS

Increased demand for red meat; increased domestic consumer expenditure; increased knowledge of health benefits associated with including red meat in the diet.

PERFORMANCE

The \$43 million invested by MLA's Nutrition program (2001-07) maintained consumer and HCP confidence in red meat despite ongoing challenges, and is likely to have contributed substantially to increasing demand for beef and lamb.

What we did

Science

Using producer levy funds matched by the Australian Government, MLA funded 39 research projects which confirmed and supported red meat's role in a healthy diet – including higher protein diets' capacity to assist in the dietary management of chronic diseases, and contributed to the development of the *CSIRO Total Wellbeing Diet* (TWD). These studies were consolidated in two major evidence-based reports commissioned by MLA on the role of red meat in a healthy diet and published in peer-reviewed journals.

Opinion Leaders

MLA collaborated with peak professional bodies and government to inform an updated nutrient composition database, science-based dietary recommendations, education resources and industry programs. MLA formed long-term relationships with the Dietitians Association of Australia (DAA) and the Heart Foundation.

Health Care Professionals

The results of MLA-funded research were reported in medical journals and presented at conferences, while targeted communications included symposiums, continuing professional development programs, patient education materials, advertisements in medical publications, newsletters and specialist websites.

Consumers

The targeted 'Red Meat. Feel Good' media campaign promoted red meat consumption 'three to four times a week', while the second phase, 'Foundation Food', communicated red meat's pivotal role in human evolution. Using its science base, MLA undertook a pro-active Issues Management program to ensure that public debate on meat's nutritional contribution is fact based.



Misconceptions about the role of red meat in a healthy, balanced diet were addressed by MLA's Nutrition program.

What we've achieved

An independent review by CIE showed that the evidence-based nutrition campaign convinced health care professionals (HCPs) to consider red meat as an important part of a healthy diet, with an increasing number recommending red meat three to four times per week in line with the Australian Dietary Guidelines.

The consumer campaign, launched in February 2002, has arrested weakening consumer sentiment, sustaining an average 85 per cent positive disposition towards red meat.

During the seven-year life of the MLA campaign, both lamb and beef demand increased by 22.3 per cent, while domestic consumer expenditure on red meat increased by about 70 per cent from \$6 billion in 2000-01 to \$9 billion in 2006-07.¹

The CIE reasons it is likely that the Nutrition program has supported an increase in demand and expenditure, however it was unable to calculate the value of the program's contribution to this change.¹

Inputs

- \$43 million (approx) 6-year investment.

Impacts

- Increased HCP knowledge of chronic disease dietary management.
- More than 540,000 Australians have lost weight on the TWD.
- HCPs have potentially contributed to social health benefits by recommending red meat three to four times per week.
- Consumers have a greater understanding of, and confidence in, red meat's role in a healthy balanced diet.

Benefits

- Likely contribution to 22 per cent beef/lamb demand increase.
- Contribution to \$3 billion per year consumer expenditure increase.
- Improved knowledge and management of chronic diseases that cost Australia \$6 billion annually.

Lessons learned

- 1 Red meat operates in a continuously challenging environment, and maintaining consumer and HCP confidence requires long-term consistent, strategic communications.
- 2 The Nutrition program is built on a strong foundation of science which ensures communication integrity and community relevance by aligning research to public health priorities.
- 3 Consultation with key health and nutrition organisations and experts is essential to increasing the volume and consistency of red meat health recommendations.
- 4 Credibility of communication with consumers is critical and messages must be delivered in an emotionally engaging manner to ensure effectiveness.
- 5 Program evaluation must be improved by employing more sensitive market research tracking measures.

¹ CIE 2008

Research snapshot

PARTNER	PROJECT	FINDINGS	INVESTMENT
CSIRO	Weight management in men and women	Higher protein diet is effective and safe for management of chronic diseases	\$316k
University of Otago	Optimising micronutrients in toddlers	Increased red meat intake prevented the decline in toddler iron stores	\$247k
University of South Australia	Contribution of red meat to polyunsaturated fatty acid intakes	Red meat contributes 28% of long chain omega 3s in the Australian diet	\$30k
University of Wollongong	Nutrient composition of retail red meat	Updated nutrient composition data consistent with butchering and consumer trimming practices	\$380k
RMIT	Diet effect on Acne Vulgaris	Higher protein, low carb diet improved acne symptoms	\$108k

Gathering the evidence

Maintaining the integrity of MLA's Nutrition program, and contributing to public health and industry understanding, are dependent on credible research that:

- a) increases knowledge of red meat's role in a healthy diet; and
- b) addresses health concerns that call for reduced red meat consumption.

Evaluation has shown that nutrition research has helped to improve knowledge of dietary management of chronic diseases and provided the foundation for evidence-based communications.

Tracing the impacts

Nutrition R&D investment

The \$6 million investment in research, including matching funds from the Australian Government, was built around three strategic objectives:

1. Establish red meat's role in a healthy diet
2. Investigate the efficacy of red meat diets in chronic disease management (eg obesity, type 2 diabetes)
3. Address concerns about red meat's nutritional integrity and safety.

Inputs to outputs

Between 1998 and 2007, MLA funded 39 red meat and nutrition research projects in consultation with a Research Advisory Committee comprising industry and academic representatives.

Study findings confirmed higher-protein red meat diets could assist in the dietary management of chronic conditions. Results were presented at nutrition and medical conferences, and published in peer-reviewed journals including the *American and European Journal of Clinical Nutrition* and the *Australian Nutrition and Dietetics Journal*.

MLA funded important research which contributed to the development of the TWD. Launched initially with MLA marketing support, this has had a significant impact on Australians' awareness of healthy eating, with approximately 10 per cent of Australian households implementing the diet.¹

Effective consultation ensures that information delivered under MLA's Nutrition program is based on sound scientific evidence.



Nutrition R&D outcomes

INDUSTRY

Nutrition research has improved industry knowledge through the release of up-to-date information detailing red meat's nutrient content and health value. This information has enabled the industry to develop accurate and innovative point-of-sale (POS) material highlighting the nutritional value of red meat. The nutrient composition data will be incorporated into Food Standards Australia New Zealand (FSANZ) food composition databases, providing up-to-date and consistent nutrient information.

SOCIAL

By funding research that explores the connection between red meat and nutrition, MLA has contributed to a growing body of evidence which suggests higher protein, low fat diets may help to prevent and manage important public health concerns such as obesity and diabetes.

Publication and presentation of research findings updates professional knowledge of chronic disease dietary control. For example, diet and acne research supported by MLA was translated into practical resources in collaboration with the College of Dermatologists and DAA.

Nutrition R&D impacts

INDUSTRY

Misconceptions about the role of red meat in heart health were addressed by MLA's 'Tick in Butchers' program. An initiative of MLA, the Heart Foundation and industry, the program makes compliance with the Heart Foundation Tick easier for butchers – and choosing leaner meat easier for consumers.

SOCIAL

- MLA-funded research has contributed to increased knowledge of chronic disease dietary management, and facilitated health professionals' adoption through education programs and dissemination of resource materials.

- More than 540,000 Australians (3 per cent of the population) have lost weight on the TWD partially funded by MLA.¹

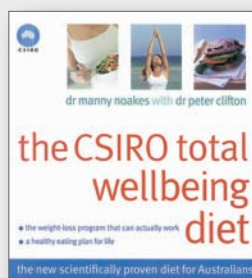
Nutrition R&D benefits

MLA-funded red meat and nutrition research, communication and promotion have contributed to consumer wellbeing measured by the number of Australians who have implemented, and benefit from, the TWD. Adoption of R&D findings is expected to contribute to improved clinical management of chronic diet-related conditions that currently cost the nation more than \$6 billion annually.

¹ Inside Story Knowledge Management, November 2006, *Awareness, Usage and Attitude Study for the CSIRO Total Wellbeing Diet*

- HCP prescription of red meat three to four times per week potentially contributes to health benefits.

- Industry application of nutritional data on product labels potentially generates higher red meat sales.



“We’re excited by these findings that demonstrate in a scientific manner that the higher protein, low fat approach offers an effective weight loss alternative.”

– Dr Manny Noakes, CSIRO Senior Research Dietitian and
The CSIRO Total Wellbeing Diet co-author

Effective consultation achieves public health outcomes

Consultation with Australian government and industry organisations, health professionals and eminent research institutions ensures that information delivered under MLA’s Nutrition program is based on sound scientific evidence.

Consultation is facilitated by MLA and involves gathering scientific evidence, conferring with key opinion leaders, alerting health professionals to new information and engaging consumers.

Tracing the impacts

Consultation investment

Consultation expenditure falls under MLA’s \$5.7 million research investment between 2001 and 2007. It relates specifically to monitoring government and non-government organisations’ nutrition and health policies; engaging in partnerships; and building and maintaining positive relationships with key opinion leaders to ensure message accuracy and consistency.

Inputs to outputs

In 1999 MLA convened a Human Nutrition Research Advisory Committee to review evidence on the role of Australian red meat in a healthy diet.

Collaborative relationships developed through MLA-research programs with FSANZ, the CSIRO, DAA and the Heart Foundation have generated the following outputs:

- An updated nutrient composition database that recognises changes in red meat’s supply chain over the past decade
- Dietary recommendations that recognise red meat’s contribution to meeting nutritional requirements (iron bioavailability) in the Australian diet
- Input into the use of higher protein diets, including red meat consumption three to four times a week, to manage weight and chronic disease
- MLA information and education resources on the DAA website
- Development of the ‘Tick in Butchers’ program which identifies lean red meat cuts that meet Heart Foundation standards.

Consultation outcomes

The Research Advisory Committee Report, *The Role of Red Meat in Healthy Australian Diets*, addressed misconceptions about red meat consumption (‘makes you fat’, ‘causes heart disease’).

The landmark 2001 report, Australia’s first comprehensive review of evidence around red meat’s role in a healthy diet, was updated in 2007 based on subsequent research.

The report’s credibility has facilitated relationships with key peak professional bodies and Government organisations. DAA and the Heart Foundation said they supported the report, which was prepared by high level nutrition experts, because it provides stakeholders and health professionals including dietitians and GPs with evidence-based information.

Consultation impacts

Consultation with experts, scientific and professional organisations has ensured consistency of health-based red meat consumption recommendations within the community.

Changes attributed to MLA’s consultation efforts include:

- HCPs have potentially contributed to health benefits by prescribing a lean red meat intake three to four times per week in line with dietary recommendations
- Industry representatives have potentially contributed to higher red meat sales through promotion of nutrition messages, application of up-to-date nutritional data on product labels and participation in programs such as the ‘Tick in Butchers’ initiative.

Consultation benefits

MLA’s consultative efforts have contributed to updated HCP knowledge and acceptance of red meat’s nutritional value. This should improve management of chronic diet-related conditions that cost the nation more than \$6 billion annually.¹

CSIRO study promotes wellbeing

Launched in 2005, the TWD was based on CSIRO research including an MLA-supported study that demonstrated a higher protein, low fat approach to weight loss was effective.

Research tested the effectiveness of diets in overweight women prone to metabolic syndrome – a disorder that more than half of the Australian population is at risk of developing which increases the threat of type 2 diabetes and cardiovascular disease.

A comparative trial showed that a higher protein, low fat diet was more effective than a high carbohydrate, low fat diet in obese women with high blood triglyceride levels.²

A 12-month evaluation confirmed that a significant proportion of women who combined a protein enriched eating plan with exercise could maintain long-term weight loss.

Launched initially by MLA in *The Australian Womens Weekly*, publication of *The CSIRO Total Wellbeing Diet* in book form sold more than one million copies and approximately 547,000 Australians (3 per cent of the population) have lost weight on the TWD.³

¹ CIE 2008

² Noakes, M et al. 2005, *American Journal of Clinical Nutrition*, Vol. 81, pp1298-1306

³ Inside Story Knowledge Management, November 2006, *Awareness, Usage and Attitude Study for the CSIRO Total Wellbeing Diet*

- The number of surveyed dietitians prescribing red meat three to four times a week increased 31 per cent (2001–07).
- The number of surveyed GPs prescribing red meat three to four times a week increased 16 per cent (2001–07).



Targeted communications developed in consultation with health organisations helped to cement MLA's status as a reputable provider of evidence-based information.

Prescribing red meat 3 to 4 times a week

The health care professional (HCP) program was developed in consultation with key experts and health organisations to ensure consistency with the latest evidence-based public health recommendations. MLA implemented targeted professional and patient communications designed to support public health policy, including professional education updates and resource materials to aid dietary management of conditions such as obesity and heart disease.

Tracking research showed that before the HCP campaign launch in 2001, up to 40 per cent of GPs were recommending a red meat intake of one to two servings per week – significantly less than the Australian Government Guidelines recommendation.¹

Tracing the impacts

HCP communication investment

MLA invested about \$4.9 million in communication with HCPs between 2001 and 2007, including issues management expenditure of about \$1.4 million.

Inputs to outputs

MLA implemented a clinically relevant GP communications campaign and targeted dietitian communications that linked with important public nutrition issues.

Communication mediums tailored specifically to the HCP market included:

- Continuing professional education symposiums and workshops in conjunction with professional health organisations
- Professional and patient education resource materials
- Core advertisements and advertorials in medical journals and weeklies
- *Vital*, a quarterly newsletter distributed to 4,000 dietitians and nutritionists
- The www.redmeatandnutrition.com.au website
- CD-ROMs and recipe booklets
- Trade conference exhibits.

MLA-funded research findings were published in peer-reviewed journals; presented at medical and nutrition conferences; applied in health care practice recommendations; and published in professional education and patient resources used by HCPs. Resource materials were based on strong evidence and developed in consultation with health organisations, which supported MLA to disseminate the information to HCPs and their patients.

HCP communication outcomes

The HCP communications effort helped cement MLA's status as a reputable provider of evidence-based information. Educational material such as the Research Advisory Committee's report² conclusions were supported by independent health and professional organisations such as the Heart Foundation and DAA. Surveys of HCPs commissioned by MLA between 2001 and 2007 confirmed major behavioural shifts and increased knowledge of red meat's role in healthy eating and clinical dietary management.

Six out of 10 (61 per cent) GPs surveyed now recommend red meat three to four times a week to their patients for health and wellbeing, compared to 45 per cent in 2001, while almost half (45 per cent) recommend red meat three to four times a week to overweight or obese patients, up from only 11 per cent in 2001.

The number of dietitians surveyed who rated red meat as an essential part of healthy eating increased by 19 per cent to 86 per cent between 2001 and 2007.

Nearly nine out of 10 (86 per cent) dietitians surveyed now recommend red meat three to four times a week for health and wellbeing, compared to 55 per cent in 2001. The number who recognise red meat's value in obesity management increased by 17 per cent.

HCP communication impacts

The key message that a healthy diet should contain three to four serves of red meat a week was well received by dietitians surveyed, with the number prescribing the frequency increasing by 31 per cent between 2001 and 2007, while the proportion of surveyed GPs prescribing the recommended intake increased by 16 per cent to 61 per cent.³

It is probable that MLA's targeted communications influenced these impacts, particularly as most of the HCP attitudinal and behavioural changes coincided with initial campaign activities, although the extent of this influence cannot be determined.⁴

HCP communication benefits

MLA's communication efforts with HCPs have addressed public health priorities by improving knowledge, professional education and resource dissemination to support implementation of evidence-based dietary management of chronic diseases that currently cost Australians \$6 billion annually.

¹ MLA 2003; CIE 2008

² MLA 2001, *The Role of Red Meat in Healthy Australian Diets*

³ MLA commissioned research by Wendy Bloom Research and Robinson & James Research

⁴ CIE 2008

- Consumer communication has contributed to increased demand for lamb and beef (2001–07).
- Consumer communication has contributed to increased domestic expenditure on red meat (2001–07).

“More than 80 per cent of the mothers surveyed concurred that ‘red meat is an essential part of a healthy diet’, while more than 70 per cent agreed it is ‘essential for a healthy mind’ and that humans ‘were meant to eat red meat’.”

– Millward Brown on behalf of MLA, June 2006 to July 2007; CIE 2008

Changing consumer behaviour

Red meat is a mature consumer product that enjoys a high level of household familiarity; more than 80 per cent of Australian households have a positive disposition towards red meat. To broaden and strengthen this perception of nutritional value, MLA launched the first phase of its consumer nutrition campaign, ‘Red Meat. Feel Good.’ in 2002, followed by ‘Foundation Food’ in 2006.

Tracing the impacts

Consumer communication investment

MLA invested about \$33 million in consumer communication between 2001 and 2007.

Inputs to outputs

The ‘Red Meat. Feel Good.’ campaign aimed to increase perceptions that red meat is a healthy source of nutrition, vitality and wellbeing. Spearheaded with the message that a nutritious diet contains three to four serves of lean red meat each week, the campaign targeted mothers of children and teenagers. The second phase, ‘Foundation Food’, was based on attitudinal market research and used the catchphrase ‘Red Meat. We were meant to eat it.’ to position red meat as a ‘must have’ food essential to human evolution. Both phases were launched by a series of television advertisements supported with print and point-of-sale (POS) promotion and public relations. Commercials were aired during key tactical times to take advantage of events such as the Commonwealth Games and periods of heightened consumer interest in health such as the ‘back to school’ period.

Consumer communication outcomes

MLA-sponsored nutrition research, consultation with experts, relationship development and market research generated a two-phase consumer campaign and identified four consumer attitudinal and behaviour segments:

- Appreciators (enjoy red meat; value dietary importance)
- Acceptors (like red meat; regularly incorporate in diet)
- Resisters (eat some red meat but do not believe it is important for health)
- Rejecters (rarely eat red meat).

While red meat consumption is determined by many factors, price is substantial and the major red meat price rise between 2001 and 2007 would normally temper any demand increase. However, red meat’s resilience to rising prices is evident in self-reported consumption for all meats, which shows the red meat market share has been constant over the period. Consumers seem willing to absorb the rise and have increased overall expenditure, with tracker data (2004 to 2008) showing the consumer communications investment may have contributed to consistently optimistic views about red meat’s nutritional value.

CONTINUED OVER



Mum’s the word on red meat nutrition

The ‘Red meat. We were meant to eat it.’ campaign, starring famous actor Sam Neill, was credited with shifting target consumer attitudes by highlighting humans’ instinctive desire for red meat.

Relaunched in 2006 as ‘Foundation Food’, the second phase of MLA’s ‘Red Meat. Feel Good.’ campaign repositioned red meat as a central part of healthy eating.

The campaign directly targeted mothers with children aged five to 17 who indicated they deliberately limited the amount of red meat consumed by the household to avoid health problems.

A tracking survey conducted by Millward Brown for MLA and annual data collected by Dairy Australia conclusively revealed that mums’ confidence in red meat’s nutritional value had improved markedly: the proportion of mothers limiting consumption in 2005 (38 per cent) was well below the 2001 level of 57 per cent and since 2006 this trend has remained flat.

The ‘Red meat. We were meant to eat it.’ campaign starring actor Sam Neill was credited with shifting consumer attitudes.

“The ‘Red Meat. Feel Good.’ campaign has changed the way we and our customers think about red meat. Our staff feel professional pride in communicating the red meat message. We’re great supporters of the campaign as it assists our customers and our business.”

– Frank Russo, CEO, Rainbow Meats



Tracing the impacts

Consumer communication outcomes

The proportion of mothers with children aged five to 17 who limited red meat consumption to avoid health problems was 38 per cent in 2005 – below the 2001 level of 57 per cent¹. The reduction coincided with the ‘Red Meat. Feel Good.’ campaign, but the trend remained flat throughout and beyond the ‘Foundation Food’ campaign.

Consumer perceptions have remained strong, with 80 to 90 per cent of consumers holding a high regard for red meat.¹ The overall campaign has also helped to activate a fundamental rethink of red meat by the trade, supported and sustained by improving quality and rising retail standards.

Chart 1 shows that the largest drop in the ‘appreciator’ segment coincides with a period where there was no advertising activity (April to December 2005). This indicates that in the absence of advertising, attitudes and behaviours may not be sustained.²

There has been an apparent positive change in the proportions of appreciators, acceptors, resisters and rejecters as well as a reduction in the proportion of mums constraining red meat consumption in their households due to health concerns. However, developments in survey methodology limit statistical verification of these changes.

Consumer communication impacts

Promotion is a core part of most company and industry activity, acting as an insurance policy that helps to moderate exposure to risk. It is probable that the MLA campaign contributed to a

22 per cent demand increase for lamb and beef recorded on MLA’s demand index between 2001 and 2007, although it is difficult to put a value on this contribution due to changes in consumer research methodology over the period.¹

Consumer communication benefits

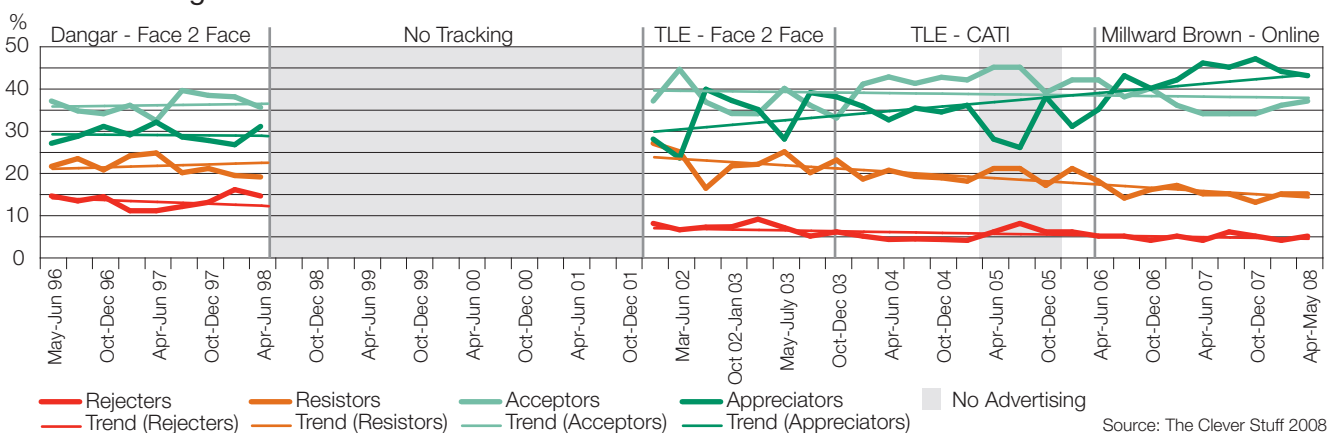
It is also likely that consumer communications have contributed substantially to a \$3 billion increase in domestic expenditure on red meat between 2001-02 and 2006-07. Estimates by noted marketing evaluation expert Dr Victoria Hodgson suggest this contribution may be as high as \$1.2b in 2007². Maintaining consumer confidence in red meat, and support for red meat’s nutritional qualities, is expected to contribute to overall community wellbeing. A break-even analysis suggests that the nutrition campaign would have had to account for about 15 per cent of this growth in order to pay back the investment, which is significantly less than the observed demand increase.

‘Red Meat. Feel Good.’ catalyst for industry development

The ‘Red Meat. Feel Good.’ campaign has been the catalyst for industry change, stimulating implementation of red meat product innovation in functional foods such as omega-3 enriched smallgoods under the ‘Healthy Living Range’ label.

Many butchers such as Victorian retailer ‘Rainbow Meats, the Healthy Choice’ and NSW chain ‘Bush’s Meats’ have reinvested in their product and presentation. They have experienced sales growth attributed to better red meat quality, consistent branding and nutritional information delivered under ‘Red Meat. Feel Good’.

Chart 1: Changes in red meat attitudes and behaviour



¹ CIE 2008

² The Clever Stuff 2008, *Changes in red meat attitudes and behaviours over time*

Level 1, 165 Walker St,
North Sydney NSW 2060
AUSTRALIA
Tel +61 2 9463 9333
Fax +61 2 9463 9393
www.mla.com.au

