

Re

 food



frame

How Australians define food that is '*better for you*' has dramatically shifted as modern aspirations for a '*better life*' have broadened.

This presents a huge opportunity for brands to step up to the plate and deliver to evolving consumer aspirations.



We are indisputably in an age of striving to *live better*

This desire for self improvement is universal. Even those most content with their lives, are still looking to better themselves in some area.

Source: TRA Reframe Food,
Q: Are any of the following areas in your life important for you to 'better'?
Base: Nat Rep Australia, n=1666



94%

Of Australians say they are **actively trying to improve** themselves in some way.



Cultural shifts are lifting the expectations and aspirations of Australians



Tracking Progress

Wearable devices are normalising **personal tracking**. There's a growing trend towards putting more health related decisions in the hands of individuals, giving them a sense of autonomy.



Growth Mindsets

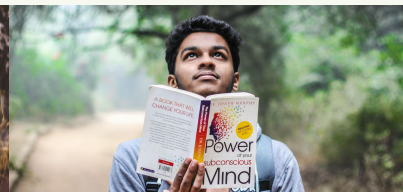
94% of millennials report making **personal improvement commitments** and say they'd be willing to spend nearly \$300 a month on self-improvement.

-Market watch 2023



Reassessing Priorities

The impact of lockdowns and economic instability have had clear impacts on both wellbeing and priorities. People are looking for **solutions to connect** more meaningfully to themselves, the people around them, and their environment and culture.



Self-help boom

The **self-help industry** is estimated to be worth \$20 billion worldwide growing by 5.6% each year. Australians are spending US\$84.4 billion annually in the **self-care economy**.

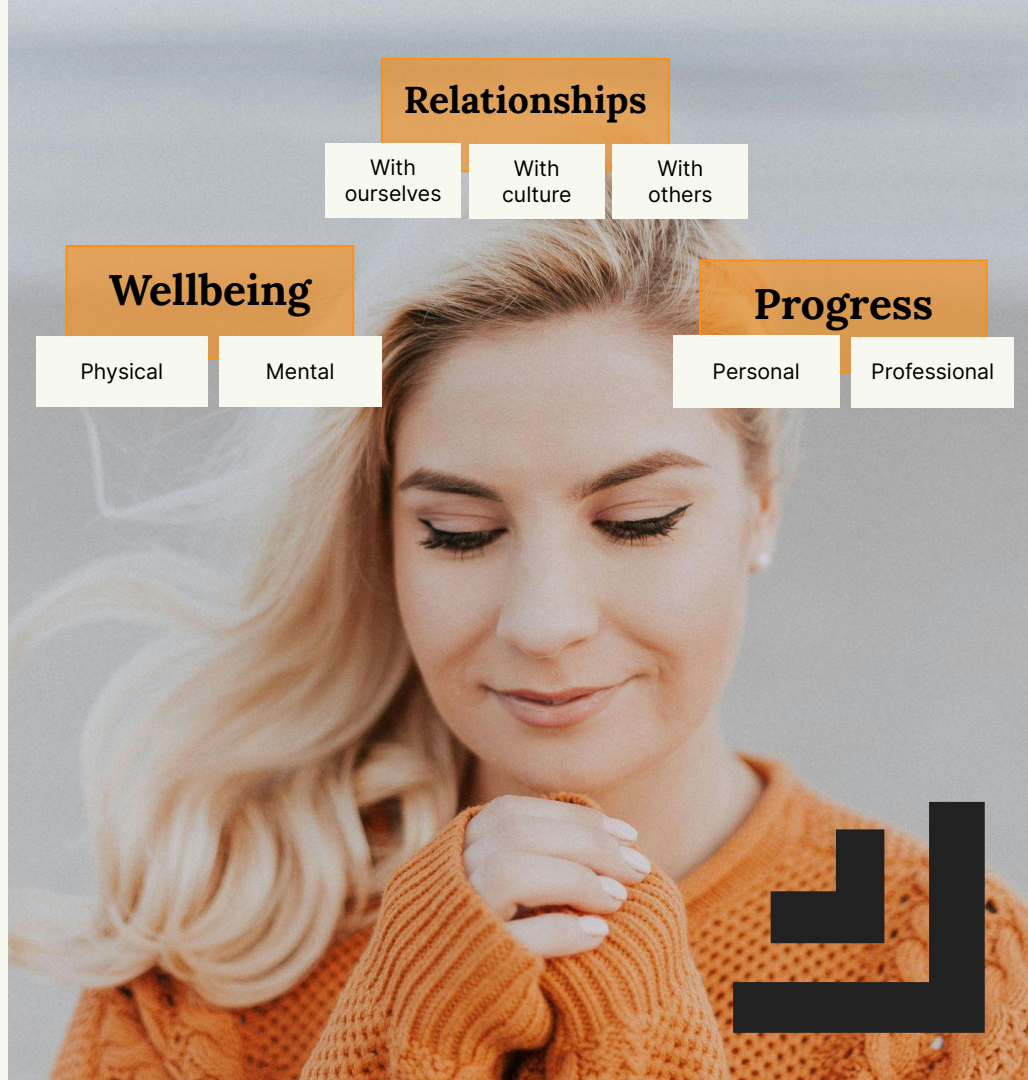
-Global Wellness Institute (GWI) and AFR

Today, when people think of 'better' it encompasses many aspirations in life

People's understanding of better is multi-faceted, spanning physical and emotional wellbeing, improving their relationships and connections and different areas of progress.

On average, Australians are looking to better **at least 3 of these 7** areas at any given time.

Source: TRA Reframe Food,
Q: Are any of the following areas in your life important for you to 'better'?
Base: Nat Rep Australia, n=1666



Food currently delivers to a *narrow convention* of 'better for you'.

'Better for you' food has mainly focused on health, positioning itself as a better alternative by reducing or removing bad ingredients and supercharging the good.

Whilst this remains a key role for food to play, there is huge potential to play a more expansive role by improving other parts of consumers lives.





90%

Of Australians believe that **food can** play a role across better areas.

There is an opportunity for food *to step up to the plate* and impact beyond traditional health roles

Embracing this evolved and broader understanding of 'better', opens opportunities for brands across more categories, with more consumers, and on more occasions.

Source: TRA Reframe Food
Q: What currently helps or enables you to better [INSERT BETTER AREA]?
Base: Nat Rep Australia, n=1561



There are 5 better for you roles that food can play



Food for Fuel

65% of Australians are actively seeking this

Fuelling and energising people to achieve their goals, everyday.

- It helps me perform physically
- It helps me perform mentally
- It's fuel or energy to keep on going



Food for Happiness

56% of Australians are actively seeking this

Boosting their mood and helping people take care of themselves.

- Makes me feel good / improves my mood
- Makes me feel good physically



Food for Connecting

45% of Australians are actively seeking this

Reinforcing existing bonds and forming new ones.

- A way to connect with other people
- A way to connect with my heritage
- A way to connect with other cultures



Food for Challenge

38% of Australians are actively seeking this

Challenging themselves, building skills and expanding their horizons.

- I can learn something new
- An outlet for creativity



Food for Expression

35% of Australians are actively seeking this

Enabling people to express themselves through the food they cook, eat and serve.

- I can express myself
- An outlet for my passion



Food for Fuel

Fuelling and energising people to achieve their goals, everyday

Food helps people to feel in control, focused and provides the energy needed for maximum performance. Predominantly functional, it's about giving people the energy and nutrients needed for maximum wellbeing and performance. But it's not all physical, food also provides a sense of control and focus.

How to deliver Food for Fuel

65% of Australians actively seeking this



Core Target



Food as fuel has **relevance to all age and genders**, providing a wide scope of opportunity for brands.

Key Occasions



Target **weekday dinners** (40%) and **breakfasts** (37%) as the moment for fueling up for better.

Weekday lunch is an occasion to fuel professional development (42%).

Locations

- 64% - **Meals at home**
- 36% - Eating out

Source: TRA Reframe Food
Base: n=1561



What

Consumers are seeking **quick** and easy, **nutritional** and **functional boosts** to fuel themselves, whilst still delivering on **taste**.

Needs

- It helps me perform physically
- It helps me perform mentally
- It's fuel or energy to keep on going

Categories

- 46% - Home-cooked meals
- 45% - **Fruits and vegetables**
- 30% - **Health foods**
- 30% - Functional foods
- 28% - Superfoods
- 26% - **Food designed for long lasting fuel**

Benefits

- 46% - Tastes good
- 45% - **Healthier option**
- 41% - **Improves physical health**
- 32% - **Quick to prepare**
- 30% - High quality ingredients

Bold = significantly above average



Food for Fuel

The rules of engagement

Inspire healthier choices and foster purposeful decision making

Source: TRA Reframe Food
Base: n=1561



Make people feel...

Fuelled and ready

Enables people to feel ready to take action towards achieving their goals.

In control, composed

Give people a feeling of control, by utilising food consciously and deliberately, as an enabler.

Focused, efficient

Power moments of productivity and empower individuals with clarity and precision.



Key messaging

Empower Nutritional Choices

- Prioritise clear communication about the benefits and ingredient transparency of products, underscoring their role in boosting energy and focus.
- Enhance with educational content that connects the dots between nutrition, performance, and achieving personal goals.

Motivate and Inspire Outcomes

- Leverage testimonials and motivational messaging to inspire your audience.
- Enable consumers to optimise their food choices based on their goals, whether it's sustained energy, mental focus, or physical performance.



Content Needs

- 34% - **Healthy eating tips**
- 28% - Recipe inspiration
- 21% - Cooking hacks
- 19% - Inspiration in shops/ supermarkets

Bold = significantly above average



Food for

Happiness

Boosting their mood and helping people take care of themselves

Food that delivers enjoyment, lifts the mood and makes both mind and bodies feel good. This can occur through both healthy foods that are aiding physical well-being and feeling good about what you have done, as well as comfort foods that can support and boost emotionally.

How to deliver Food for Happiness

56% of Australians actively seeking this



Core Target

Food as happiness has broad appeal but specifically for **men**. Both men and women in the **55-70 age** demographic and **migrants to Australia**



Key Occasions

Weekends are the key occasion to explore food as happiness, both at **dinner** (43%) and **lunch** (33%). **Weekday dinner** (42%) also has a strong role to play as a midweek pick me up.

Locations

- 63% - **Meals at home**
- 39% - Eating out
- 39% - Entertaining at home

Source: TRA Reframe Food
Base: n=1561



What

Consumers are seeking **nourishing healthy foods** to make them feel like they are doing good, as well as **comfort foods** and **nostalgic tastes** that can provide an emotional boost when needed.

Needs

- Makes me feel good / improves my mood
- Makes me feel good physically

Categories

- 50% - Home-cooked meals
- 44% - **Fruits and vegetables**
- 30% - Functional foods
- 28% - Health Foods
- 26% - **Comfort Foods**

Benefits

- 54% - **Tastes good**
- 43% - Healthier option
- 40% - **Improves physical health**
- 35% - **Improves mental health**
- 35% - Right nutrients
- 31% - **Quick to prepare**
- 29% - Eaten with other people

Bold = significantly above average



Food for Happiness

The rules of engagement

Cultivate joy and emotional uplift through food choices.

Source: TRA Reframe Food
Base: n=1561

Make people feel...

Cheerful, vibrant

Food as a mood improver enabling feelings of joy and happiness.

Calm, relaxed, safe

Food is comforting and soothing to aid in reducing stress, and as an evocative reminder of home.

Confident and positive

Feeling healthy and good in your body has a direct link to happiness and mental wellbeing.

Key messaging

Nourish Joyful Well-Being

- Highlight the connection between feeling good physically and emotional happiness.
- Showcase the dual power of food where enjoyment and health coexist.

Feel good Foods

- Craft messaging that spotlights the joy and emotional uplift food can bring into daily life.
- Position food as a mood enhancer, by emphasizing how certain nutrients or positive choices can affect mood and self-assurance.

Celebrate Comfort

- Celebrate emotional food connections from the past. Remind people of cherished family recipes and comforting flavors.
- Evoke nostalgia by recreating classic dishes or using familiar ingredients.

Content Needs



- 33% - Healthy eating tips
- 28% - Recipe inspiration
- 21% - Cooking hacks
- 18% - Inspiration in shops/ supermarkets

Bold = significantly above average



Food for Connection

Reinforcing existing bonds and forming new ones.

Food has the power to unify, creates a vehicle to connect and provides shared experiences. Food creates common ground through shared meal occasions and entertaining. Food is an entry-point to connecting with cultures, both your own heritage and different cultures.

How to deliver Food for Connection

45% of Australians actively seeking this



Core Target

Appeals most strongly to the **18-24 demographic** and men in this age-bracket in particular.

Also most relevant with **migrants to Australia**.



Key Occasions

Weekend dinners (39%), special occasions (36%) and **entertaining (35%)** are the strongest to enable food moments for connection.

Locations

The home is a core place for connection

- 57% - **Meals at home**
- 47% - **Entertaining at home**
- 47% - **Eating out**

Source: TRA Reframe Food
Base: n=1561



What

Consumers are looking for **quality** foods that demonstrate care by **nourishing the body and mind**, foods that are **loved by all** create a common ground to connect and deliver **easily shareable experiences**

Needs

- A way to connect with other people
- A way to connect with heritage
- A way to connect with other cultures

Categories

- 43% - Home-cooked meals
- 33% - Fruits and vegetables
- 25% - Health Foods
- 25% - Superfoods
- 22% - **Sweets and desserts**
- 18% - **Snacks**
- 17% - **Alcohol/ beverages**

Benefits

- 50% - Tastes good
- 39% - **Improves mental health**
- 37% - **Improves physical health**
- 37% - High quality ingredients
- 30% - **Familiar Flavours**
- 29% - **Eaten with other people**
- 28% - **Fun or interesting to prepare**
- 26% - **New or exciting**

Bold = significantly above average



Food for Connection

The rules of engagement

Create shared moments that bring us closer together

Source: TRA Reframe Food
Base: n=1561



Make people feel...

Cheerful, vibrant

The positive emotional impact and outcome people want to feel when connecting with others

Togetherness, connected

Feeling a bond, closeness and understanding of people, cultures or places

Calm and knowledgeable

Upskilling and reducing stress, allows people to relax into and enjoy moments of connection



Key messaging

Food as common ground

- Highlighting how shared food experiences and memories can strengthen bonds, and overcome social barriers
- Promoting meals, flavours and tastes that can unify and bring people to the table, offer ideas and inspiration for hosting

Facilitating Conversations

- Leverage digital platforms to create communities centered around food and its power to connect.
- Showcase how your brand supports healthy, confident social interactions, whether it's through facilitating a dinner party or a casual meet-up over coffee.

Pride in heritage

- Encourage pride and a deeper understanding diverse culinary heritages.
- Use storytelling to highlight the role of food in cultural heritage, and as a bridge to experiencing new cultures.



Content Needs

- 29% - Recipe inspiration
- 26% - Healthy eating tips
- 24% - Cooking hacks
- 22% - **Cultural background of recipes**
- 19% - Culinary/skill development
- 17% - **Food pairings**



Food for

Challenge

*Challenging themselves, building skills and
expanding their horizons*

Food is a vehicle for self improvement and skills development. A fun and pleasurable way to get outside of your comfort zone by discovering new tastes, learning new skills and expanding your palate through food. Food also can provide an outlet for experimentation and creativity.

How to deliver Food for Challenge

38% of Australians actively seeking this



Core Target

Strongest relevance with **females** either **younger (18-34 year olds)** and **older (55-70 year olds)**, before and after the big responsibilities in life tend to occur i.e. career, children etc.



Key Occasions

Weekend dinners (41%) and **special occasions (36%)** allow for time to be spent to explore and experiment.

Locations

The **home** provides a safe space for challenge and exploration

- 61% - **Meals at home**
- 47% - **Entertaining at home**

Source: TRA Reframe Food
Base: n=1561



What

Consumers are looking for **something new**, more **exotic** or **gourmet foods** that offer a **fun challenge** to expand their palettes and skills in the kitchen.

Needs

- Learn something new, personal development
- An outlet for creativity
- A way to connect with other cultures

Categories

- 45% - Home-cooked meals
- 36% - Fruits and vegetables
- 28% - Health Foods
- 22% - **Cultural/ Ethnic foods**
- 22% - **Food designed for long lasting fuel**
- 12% - **Artisanal or gourmet foods**

Benefits

- 46% - Tastes good
- 42% - Healthier options
- 36% - **High quality ingredients**
- 31% - **Whole foods/ less processed**
- 28% - **Eaten with other people**
- 28% - **Fun or interesting to prepare**
- 26% - **New or exciting**

Bold = significantly above average



Food for Challenge

The rules of engagement

Facilitate discovery, learning and development to unlock achievement.



Make people feel...

Proud, Accomplished

Developing new skills in cooking and trying new tastes, unlocks a sense of achievement and pride.

Relaxed, Cheerful

Food is a pleasurable and lower-stakes way to challenge yourself, providing a more relaxed and fun path to personal growth.

Confident and in control

Energised to push yourself further and get outside of your comfort zone.



Key messaging

Celebrate Skill-Building

- Highlight how mastering new cooking skills can lead to personal growth and a sense of achievement, inspiring consumers to continuously push their boundaries in the kitchen.
- Showcase stories, tools and techniques that encourage consumers to challenge themselves, enhance their abilities.
- Celebrate every milestone, no matter how small.

Invite exploration

- Encourage consumers to explore the world through their palate by introducing them to global cuisines and unfamiliar ingredients
- Share stories, recipes, and cooking tips that celebrate the diversity of global food cultures.
- Share your restaurant, brand, ingredient or cultural stories, to fuel excitement but also build knowledge and learning



Content Needs

- 29% - Healthy eating tips
- 29% - Recipe inspiration
- 26% - **Cooking hacks**
- 20% - **Culinary/skill development**
- 19% - Seasonally focused recipes
- 15% - **Food sharing opportunities in the local community/ online community**



Food for

Expression

Enable people to express themselves through the food they cook, eat and serve.

Food is a vehicle to express and share with others, acting as a representation of interests, culture, passions and skill. Food offers an easy and empowering way for people to feel confident exploring and expressing themselves, through the dishes they make, eat and serve.

How to deliver Food for Expression

35% of Australians actively seeking this



Core Target



Food as expression has relevance to **all age and genders**, providing a wide scope of opportunity for brands.

There is a slight increase in relevance among **men aged 18-34**.

Key Occasions



Occasions that provide more time, such as **weekend dinner (42%)**, **special occasions (39%)** and **when entertaining (37%)**.

Locations

Location can be anywhere, as long as it's with others

- 59% - **Meals at home**
- 50% - **Entertaining at home**
- 48% - **Eating out**

Source: TRA Reframe Food
Base: n=1561

What



Consumers are looking for **foods they can share with others, that say something about themselves**, demonstrating their knowledge, skill or expressing who they are.

Needs

- A way to express myself
- An outlet for passions

Categories

- 44% - Home-cooked meals
- 31% - Fruits and vegetables
- 28% - Functional foods
- 26% - **Cultural/ Ethnic foods**
- 26% - **Comfort foods**
- 23% - **Sweets/ desserts**
- 23% - **Alcohol**

Benefits

- 51% - Tastes good
- 45% - Healthier options
- 39% - High quality ingredients
- 29% - **Eaten with other people**
- 29% - **Fun or interesting to prepare**
- 28% - **New or exciting**
- 24% - **Exploration of culture**
- 15% - **Plant based food**

Bold = significantly above average



Food for Expression

The rules of engagement

Celebrating food as a multifaceted tool for expression

Source: TRA Reframe Food
Base: n=1561



Make people feel...

Vibrant, Cheerful

Using food to express yourself should be a fun and joyful experience.

Creative

Food provides an accessible and tactile outlet for creative expression and experimentation..

Confident and connected

Food offers a more tangible expression, creating a physical representation that can be understood by others.



Key messaging

Food as a vibrant playground

- Inspire people to see food as a vibrant playground for self-expression and experimentation.
- Highlight stories and ideas that encourage fun and creativity

Provide platforms for expression

- Offer platforms and opportunities to feature consumer stories and showcase their culinary creations with wider audiences, building confidence through recognition and appreciation

Provide platforms for expression

- Develop tools or services that allow consumers to customise to their taste preferences or dietary needs. Personalisation enhances the consumer's ability to express themselves through the food choices they make.

Bold = significantly above average



Content Needs

- 28% - Recipe inspiration
- 26% - Healthy eating tips
- 25% - Cooking hacks
- 24% - **Knowledge of cultural background of recipes**
- 21% - **Culinary/skill development**
- 15% - **Emerging food trends**

Re

A silver fork with an ornate handle is shown from a side-on perspective, holding a portion of spaghetti. The spaghetti is coated in a light-colored sauce and garnished with black pepper. An orange rectangular box is superimposed over the spaghetti, containing the word "food" in a black, cursive script font.

food



frame