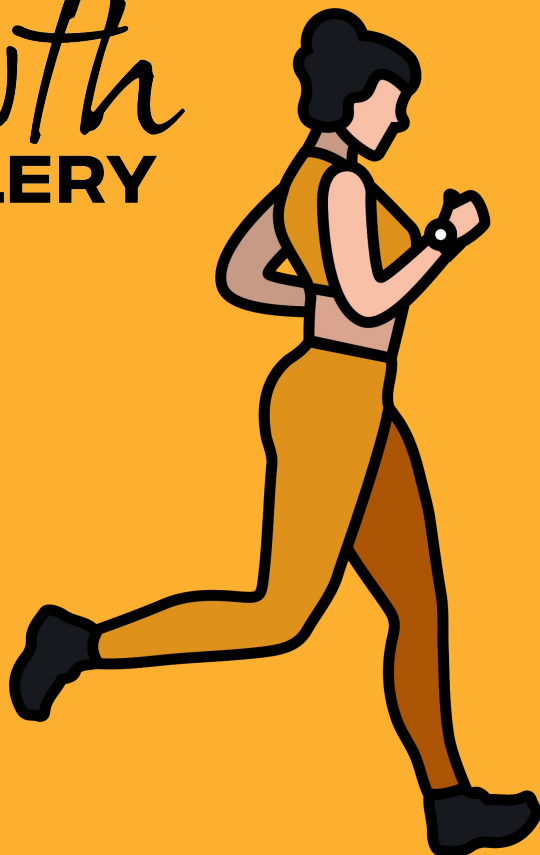


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Top H&W aspirations

- #1** To be happy - 67%
- #2** Staying healthy as I age - 62%
- #3** To enable me to have a good quality of life - 51%
- #4** Feeling good today and in the future - 50%

Aussies are **being kind** to themselves

Increasingly health is more about positivity than problem solving, with a continuing increase in self compassion and self care.

Aussies are taking a more holistic and kinder approach to Health and Wellbeing, with top aspirations revolving around happiness, quality of life and feeling good. A continuous shift away from from problem focused solutions like losing weight.

When it comes to information, Aussie's want **experts not influencers**

Australians are seeking trustworthy and credible information from experts. They are also less willing to compromise on receiving advice from health professionals than from general & digital sources, opting for experts over influencers.

After the advice of friends and family, professional or expert advice from healthcare practitioners (doctors, nutritionists, therapists, etc.) is the top source of information. More popular a source than any social media site and almost 3x more important than influencers.



Health is wealth, but the costs weigh heavy

The Cost of Living crisis may have an enduring negative impact on the wellbeing of those most affected.

Rising expenses and cost of living are taking a toll on our health. Many Aussies are facing financial constraints, but those hit hardest by economic challenges are putting their health and wellness on the back burner compared to a year ago.



1 in 3

whose budgets have been impacted by COL say that they are **doing less for their H&W** than they were 12 months ago

55%

Of those doing less say **affordability** is the key reason/ barrier

Those in a worse position are more likely to have a **short-term orientation**, focusing on managing what's on their plate today rather than planning for their future



Spending time outdoors is an increasingly essential component of health and wellbeing

When it comes to making choices that enhance health and wellbeing, outdoor activities like exercise and relaxation take precedence over digital behaviors such as tracking or content consumption. Even organized indoor endeavors like yoga, sports, and gym sessions are more open to compromise than spending time in outdoor environments.

This shift is likely due to a post-COVID era "halo effect" on outdoor experiences, turning them into daily highlights that provide a vital positive boost. The result? A nation leaning into nature for the ultimate health and happiness upgrade.

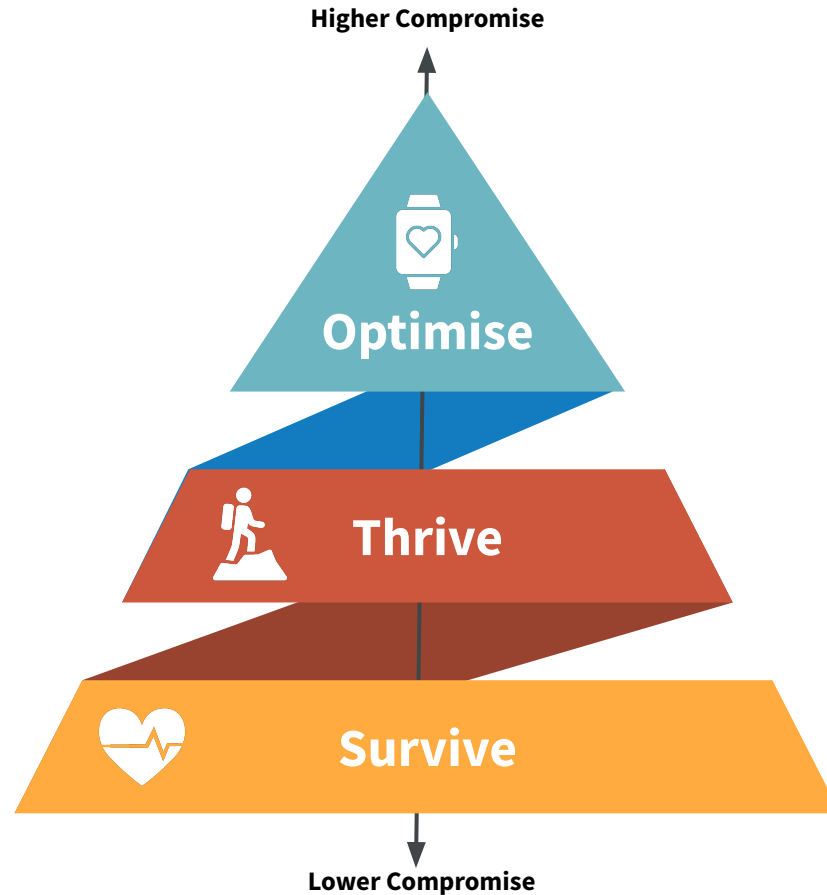
Resource constraints are forcing Aussies to rationalise their health & wellbeing spend and choices

As people re-evaluate their spend, we see varying levels of resilience across different health and wellbeing categories and behaviours. More resilient categories are less vulnerable to trade offs, trade downs and trade-outs.



What and how Australians are prioritising can be understood through 'The Resilience Paradigm'

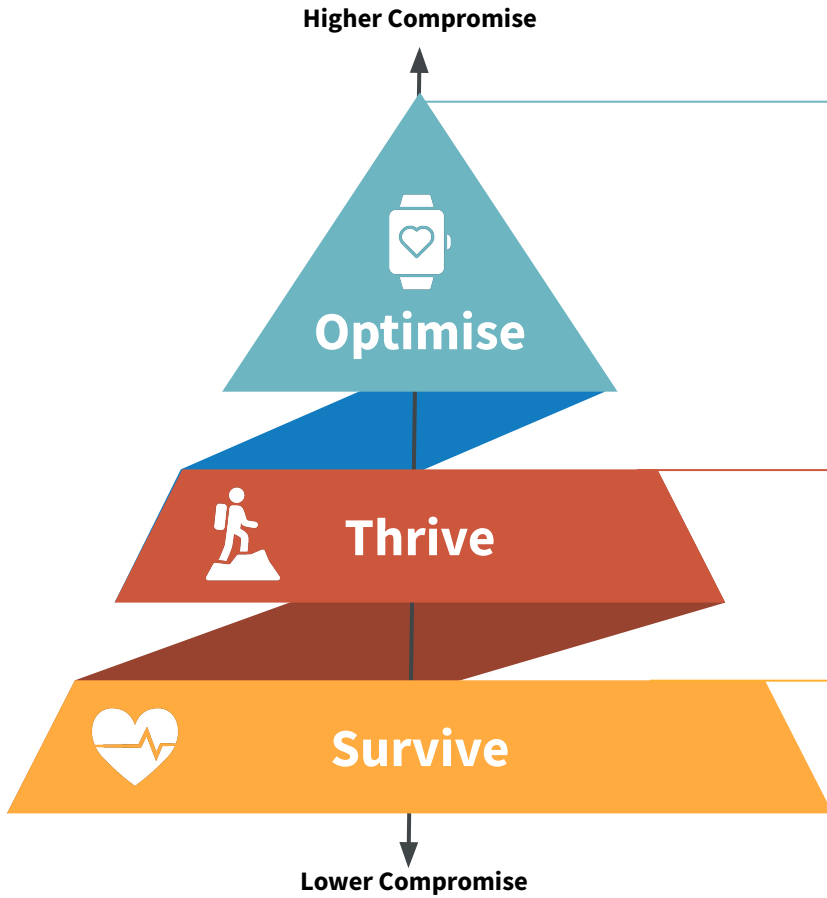
The extent to which an action or product is seen to help people Survive, Thrive, or Optimise, determines the level of resilience and with it the compromise.



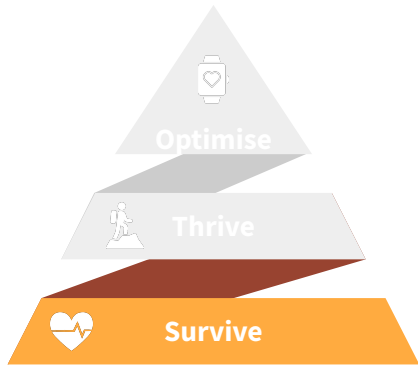
03 Elements of H&W that allow us to **'level-up'** and **supercharge** our pursuits

02 Elements of H&W that make us **feel good** and **flourish**

01 Elements of H&W that are most **fundamental** to our survival



03	<p>Behaviours</p> <p>Health Tracking, Meditation, Indoor Exercise, H&W Content, General Advice, Non-Alcoholic Drinks, Organised Sport, Doing Yoga</p>	<p>Categories</p> <p>Weight Reduction, Dieticians / Nutritionists, Spas, Alternative Therapies, Personal Trainers, Cosmetic Surgery, Sports Clubs, Meditation Services, Ready to Go Meals, Wearables and Virtual Trainers, Gym Memberships, Fitness Classes, Sport Equipment/ Bikes, golf etc</p>	<p>Trade Offs</p> <p>Trading Out and Discontinuing, Looking for DIY Options, Scaling Back Frequency, Lower cost alternatives</p>
02	<p>Behaviours</p> <p>Spend Time Outdoors, Relaxing Activities, Advice from Health Professionals, Outdoor Exercise</p>	<p>Categories</p> <p>Skincare, Personal Care Products, Psychologists, Health Foods, Supplements, Telehealth</p>	<p>Trade Offs</p> <p>Wallet friendly substitutes – e.g., Generic and Unbranded Versions, Items on Special, Scaling Back Frequency</p>
01	<p>Behaviours</p> <p>Sleep Quality & Quantity, Eating Healthy, Managing Stress, Work-Life Balance</p>	<p>Categories</p> <p>Glasses or Optical, Pharmaceuticals, Sleep Aids or Products, Dental, GP / Private Hospitals, Health Insurance</p>	<p>Trade Offs</p> <p>None at all, Lower cost alternatives</p>



Survive categories and behaviours are most resilient, as foundational elements to support everyday H&W

“I will keep health insurance but remove the extras.”

Female, Young Family

“Look for a dentist that does Afterpay or payment plans.”

Female, DINK

BEHAVIOURS

These H&W behaviours **maintain foundational health**, often seen as **critical everyday essentials**.

The most resilient behaviours and ones that Aussies are least willing to compromise. Doing the same amount or more of compared to 12 months ago.

- Sleep Quality & Quantity Eating Healthy
- Managing Stress
- Work-Life Balance

CATEGORIES

These products or services are for everyday usage (such as glasses, sleep aids) or ‘as you need’ (such as GPs and dental).

These products tend to be more **difficult to replace**, and harder for people to find suitable compromises for.

- Glasses or Optical, Pharmaceuticals,
- Sleep Aids or Products,
- Dental,
- GP / Private Hospitals,
- Health Insurance

TRADE OFFS

These are products people have a **low willingness to compromise** given their perceived essentialness.

People are willing to **trade down to lower cost alternatives**, such as bulk billing or payment plans, or stripping back to the basics for health insurance.



Thrive categories and behaviours that support and boost overall Health and wellbeing making people feel good

“I have altered my skin care purchases from brand names to supermarket brands.”
Male, SINK

“Still participate in therapy but go less frequently, so every fortnight instead of weekly.”

Female, SINK

BEHAVIOURS

These behaviours have **strong emotional impact**, helping to **recharge** or **reassure** individuals.

Things Aussies are doing the same amount or more of compared 12 months ago and are only willing to compromise on to some extent.

- Spend Time Outdoors,
- Relaxing Activities (e.g. gardening, reading)
- Advice from Health Professionals
- Outdoor Exercise

CATEGORIES

These are products services with added emotional benefits that people value.

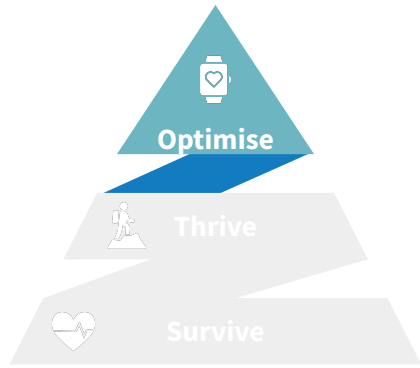
These include **supportive services** that give access to professionals, everyday facilitators of **self care**, as well as **health boosters**.

- Skincare
- Personal Care Products
- Health Foods
- Supplements
- Psychologists
- Telehealth

TRADE OFFS

Australians are not willing to eliminate these products from their lives, so look for **simple, wallet-friendly substitutes** and **trade-offs** instead.

The most common ways they are doing this is by **purchasing generic or unbranded versions** or items only **on special** (particularly for skincare & supplements), or moderately **scaling back their frequency** of usage



Optimise discretionary categories and behaviours that help people to supercharge H&W pursuits, but are most vulnerable to compromise

“Use park free exercise equipment and walk daily around the area instead of gym membership.”

Male, Empty Nester

“Reflexology activity can be done by myself by reading relevant books.”

Female, SINK

BEHAVIOURS

Behaviours that help people ‘level-up’ and supercharge pursuits. These are the most **discretionary** and include **lifestyle choices**, digital content and **organised activities**. Things Aussies are typically doing a similar amount or less of compared to 12 months ago and have a higher willingness to compromise.

- Health Tracking
- Meditation
- H&W Content, General Advice
- Non-Alcoholic Drinks
- Organised Sport
- Indoor Exercise
- Doing Yoga

CATEGORIES

The Optimise categories are typically more **expensive, high-cost investments** and **most elastic**. Tend to be more focused on **wellness** or **physical fitness** and **training**.

- Weight Reduction
- Dieticians and Nutritionists
- Spas or Wellness services
- Alternative Therapies
- Cosmetic/ Aesthetic Surgery
- Meditation Services,
- Ready to Go Meals
- Personal Trainers
- Sports Club Fees
- Wearables
- Virtual Trainers
- Gym Memberships
- Fitness Classes
- Pilates/ yoga Classes
- Sport Equipment
- Fitness Apparel

TRADE OFFS

These are categories people have a **higher willingness to compromise** on, and are easier to **replace, reduce** or **substitute** than other categories

People are willing to **trade out** and **discontinue** activities in favour of **lower cost or free alternatives** (e.g., cancelling gym memberships in favour of outdoor exercise), opting for **DIY alternatives**, or **scaling back considerably** their frequency of use, or size of plan.

Implications for brands

01

How can you be part of the happiness aspirations?

02

How can you move down the pyramid and become a more essential/valuable part of their world?

03

What are your trade down solutions, rather than trade outs?

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