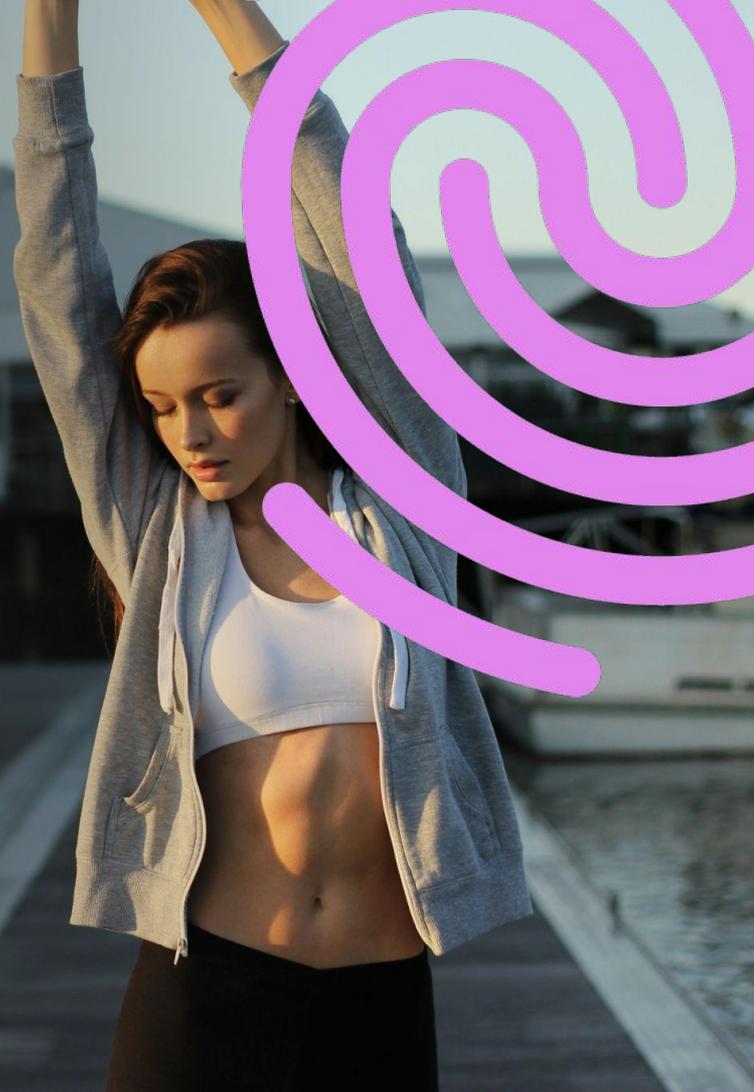




SIGNALS OF INTENT

Health & Wellness



Health & Wellness

Signals of Intent

The first work in this series unpacked travel, decoding the behavioural and psychological markers that reveal genuine purchase intent.

This was built on close to **half a million real-world travel transactions** from Australians over the past two years, combined with **onsite behaviour from more than 13 million Australians** engaging with travel content.

We now bring this same proven approach & framework into **health & wellness**. To do so, we conducted primary research with 3,000+ Australians, including a deeply profiled subset with linked transactional data, allowing us to connect behaviour, motivation & real-world action.



The modern marketing dilemma.

- 1 Marketing effectiveness is stalling despite advanced methods to measure consumer behaviour.
- 2 The abundance of data sources creates noise and complexity in finding new customers.
- 3 First-party data alone is not enough to identify consumer motivations that drive real intent.
- 4 Marketers are struggling to identify clear signals for consumer purchasing and conversion.



While marketers face increasing complexity, consumers haven't pulled back in health & wellness. Instead, **they are diving in.**

The health & wellness category has experienced sustained, outsized growth over the past five years, and is expected to double in size to over \$200 billion USD by 2033.





Consumers enter the health & wellness market with one of three distinct health outcomes in mind.

1. Fixers

Fix a specific health concern

16% of Health & Wellness consumers are fixers.

Driven primarily by medical necessity, they act when something needs addressing.

2. Sustainers

Maintain current health

65% of Health & Wellness customers are sustainers.

Driven by gentle improvement or condition management, they want to keep the status quo and manage life.

3. Enhancers

Enhance performance or boost health

18% of Health & Wellness customers are enhancers.

Driven by performance, aesthetics and optimisation, they want to optimise and reach a best self.



Sustainers provide *volume* + Enhancers deliver *value* = biggest commercial gain.

- **Enhancers:** smallest group but highest spenders (\$795), buy 3.9 categories usually gym memberships, wearables, fitness app, premium vitamin supplements.
- **Sustainers:** moderate spend (\$609), but huge scale across 65% of the consumers, buy 2.2 categories.
- **Fixers:** lowest spend (\$492), reactive and often non-discretionary e.g. insurance, buy 1.7 categories.



While health goal highlights the opportunity and determines basket, it doesn't guarantee conversion.

We need to understand the “**activator**” that moves a consumer from simple intent to rapid purchase and increased spend.



The activator

Agency is the strongest predictor of high value purchase intent.

Higher agency leads to:

50% greater spend.

2x basket size

Higher probability to transact.

What is Agency?

Agency is the invisible engine behind every purchase. It is the belief that “my actions make a difference”. Individuals can be either high or low agency.

It starts as mindset (a sense of personal control) and manifests in behaviour (how actively people manage their health and wellness).

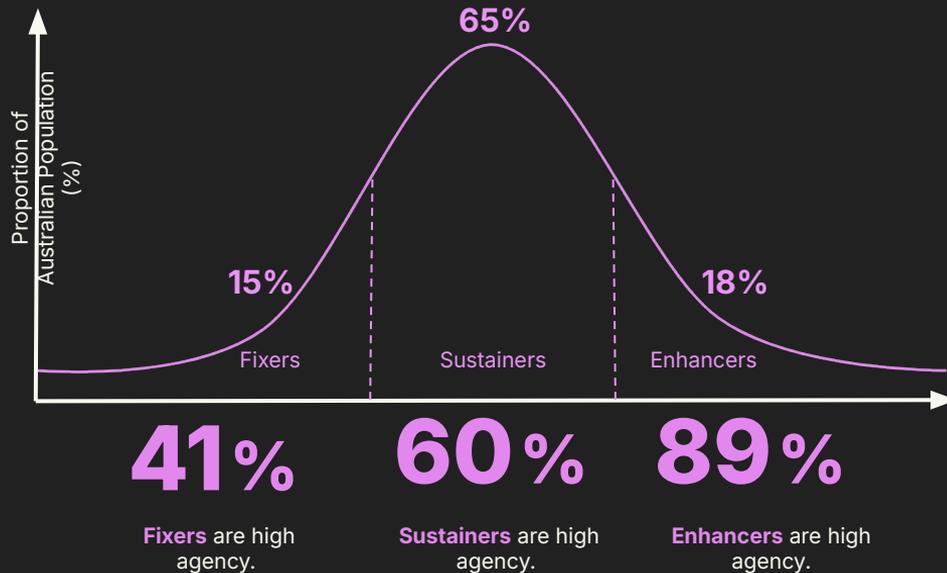
High-agency individuals are:

- **3×** more likely to see wellness as top-of-mind
- **2×** more confident in navigating choices and decisions

Agency outperforms other traditional predictors of intent.



High Agency can be found across all health goals, but it is more commonly found in Sustainer and Enhancer cohorts.



This hierarchy matters commercially:

Health goal shapes the context (what to buy), agency determines conversion (when/if to act). High agency, means consumers are more likely to transact & spend more.

So being able to identify more high agency consumers is an incredible tool for brands.

In a crowded market, disproportionate returns come from focussing on the two highest value customer segments:

High-Agency Sustainers & Enhancers.

They bring the greatest opportunity and ROI, altogether representing 55% of the total health & wellness market.



1.5x

High-Agency Sustainers spend 1.5 more than low

\$825

High-Agency Enhancers' average spend, \$300 more vs low agency counterpart

Now that we know who to target, the next challenge is identifying these high agency consumers.

To do this we must identify the behaviours signals that clearly distinguish high-agency individuals from low-agency ones.

We've identified the behavioural signals and decision-making patterns that reveal the markers of high agency, and thereby, high intent to purchase and greater spend in health & wellness.

The 3 core signals of high agency intent in health & wellness.



1

Analytical Search Behaviour

High-agency consumers begin with comparative, evidence-seeking search.



2

Depth of Editorial Engagement

High-agency consumers actively use premium health editorial as decision support, consuming more content and relying on it to validate choices.



3

Verification and Follow-Through

High-agency consumers validate decisions through reviews and trusted environments, then move decisively to action.

1.

Analytical search behaviour

High-agency consumers start with a selection mindset, using search to compare, and eliminate options rather than to just explore broadly.

51% of High-agency sustainers use search throughout their health & wellness purchase journey, this intensifies to 67% for High-agency enhancers.

High-agency consumers are:

23%

more likely to search for *"Best options for [specific need] near me"*

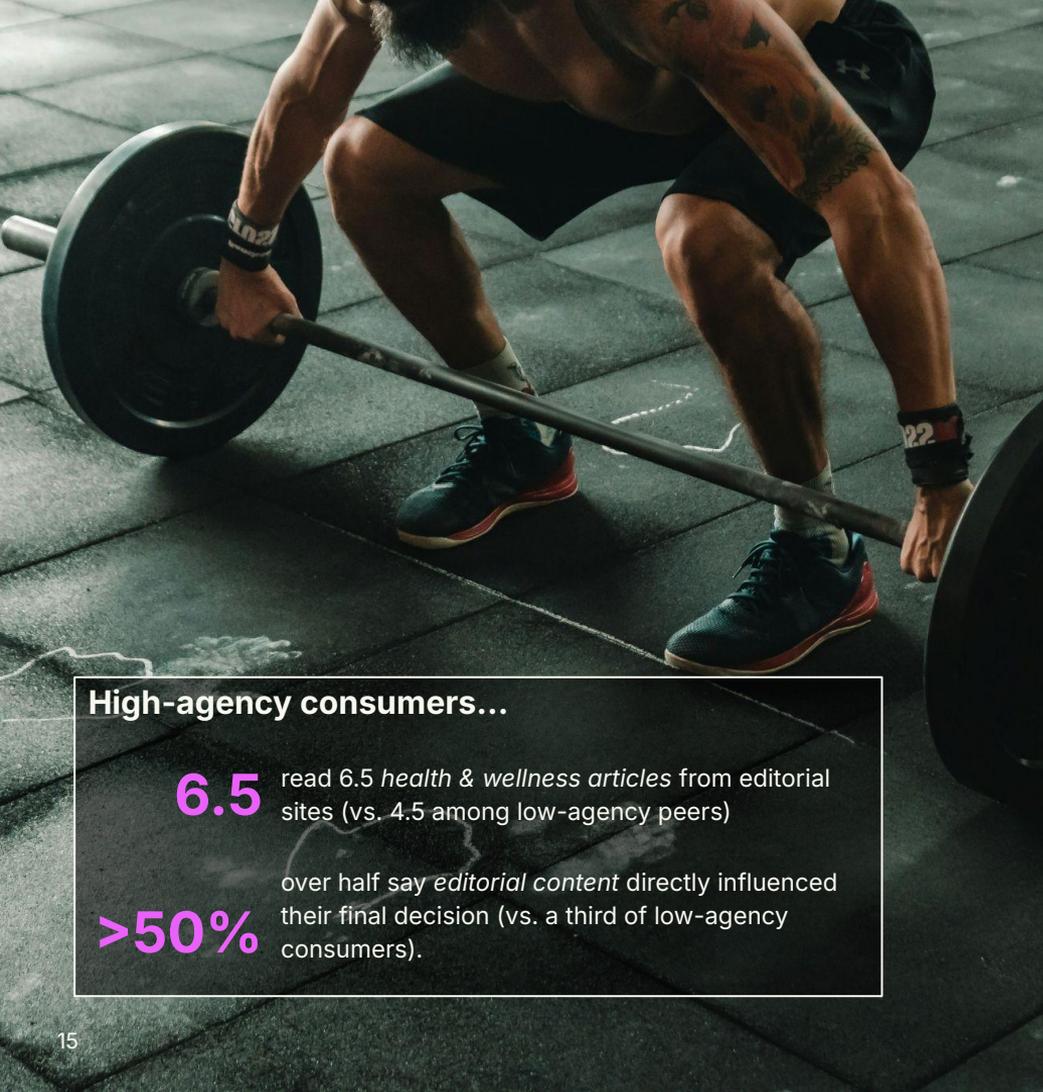
20%

more likely to search for *evidence-based advice for [health goals]*

16%

more likely to search for *"Product A vs product B"*





2.

Depth of editorial engagement

High-agency consumers build confidence through editorial content.

They consume a **higher volume of health content per journey**, with a strong reliance on specialist and trusted editorial environments.

High-agency consumers...

6.5 read 6.5 *health & wellness articles* from editorial sites (vs. 4.5 among low-agency peers)

>50% over half say *editorial content* directly influenced their final decision (vs. a third of low-agency consumers).

3.

Verification and follow-through

High-agency consumers validate their purchase decisions, then move quickly with confidence.

These behaviours show up through their:

- Strong trust transfer from editorial to brand.
- Greater likelihood to request quotes or contact providers.
- Higher use of reviews and third-party validation.



High-agency consumers are:

54%

more likely to *trust brands that appear in specialist health & wellness news websites*

1.5x

more likely to *request a quote or contact a health & wellness provider to inquire*

1.4x

more likely to deem *endorsement by a trusted expert or a credible source as important in decision*

So what?

Agency = intent

Agency is the strongest predictor of purchase spend in health & wellness. But it becomes commercially useful only when it shows up in behaviour.

These 3 signals are where agency becomes visible, targetable, and influenceable:

- Analytical search reveals *readiness*
- Editorial engagement builds *confidence*
- Verification confirms *commitment*

Together, these signals track consumer readiness, confidence and commitment... or put simply: their intent to purchase.



We now know that *high-agency sustainers* are a critical cohort to target. But what about the **26% who are low-agency?**

Can we shift them to high-agency, and in doing so increase their value?

Yes.
And the pay off for
doing so is tremendous.

50%

Greater spend from high
agency sustainers vs low





So how can we do it?

In order to shift low-agency sustainers to high, we must shift them from *lifestyle triggers* to *information triggers*.

The key to doing this is **urgency**.



Why *traditional urgency* fails for low-agency sustainers.

Traditional urgency cues ("don't wait", "act now") assume consumers already believe:

- Their actions will make a difference
- The outcome is controllable
- The effort will pay off

But low-agency sustainers *do not uphold these beliefs strongly.*

The result of this is that urgency framed as pressure creates:

- Deferral ("I'll get to it later")
- Passive consideration without action
- Short-term engagement with no follow-through



Creating *urgency* to activate low-agency sustainers.

Urgency is not an inherent trait. In health & wellness, it is created *when the right narrative activates a sense of control (agency) within the right context.*

What the data shows for sustainers:

- Low-agency sustainers lack urgency, not interest.
- High-agency sustainers respond to three Health & Wellness narratives that reinforce:
 - *Personal control*
 - *Long-term impact*
 - *Ownership over future outcomes*



Time is Now

“Future health is shaped by today’s choices”

Creates *temporal urgency* and answers the question: why should I act now?

This is the *strongest urgency lever* for Sustainers because it reframes outcomes as preventative and cumulative. Sustainers don’t act because something is wrong, they act because delay has a cost.

How urgency shows up:

- Moves behaviour from “someday” to “start now”
- Creates momentum without requiring a health scare

Where it works best:

- Food & nutrition
- Fitness & movement
- Supplements and daily wellness habits





Owning It

“My health outcomes are something I actively shape”

Converts motivation into *accountability* and answers the question: who is responsible for making this happen?

Ownership shifts Sustainers from *passive maintenance* to *personal responsibility*. This is where agency becomes self-driven.

How urgency shows up:

- Action is framed as a choice, not a chore
- Responsibility moves from experts to one's self

Where it works best:

- Programs, plans and subscriptions
- Habit-based categories
- Any product requiring consistency or commitment
-





Maximise & Optimise

“I can get more out of my health if I use the right tools”

Turns belief into *confident action* and answers the question: how do I act in a way that actually works?

This is the urgency narrative that *gives sustainers permission to act with confidence*. It removes friction by making action feel smart, not risky. Note emphasis on: *better return on effort*.

How urgency shows up:

- Delay feels like missed upside
- Action feels efficient, informed and justified
-

Where it works best:

- Wearables
- Fitness apps
- Premium supplements and performance oriented wellness products and services



Urgency translates into commercial value.

When urgency narratives reinforce *temporal urgency*, *accountability* and *confident action*, Sustainers behave different and spend way more.

Across all narratives, the pattern is consistent: ~2x spend uplift among high-agency vs. low-agency.

For Sustainers, activating agency through urgency directly translates into increased commercial value.



1.8x



Spend uplift for Time is Now narratives.

2.1x



Spend uplift for Owning It narratives

1.9x



Spend uplift for Maximise & Optimise narratives



If nothing else...

Agency is the critical factor in determining high value intent.

- There are 2 groups to focus on: high-agency sustainers and enhancers who both spend significantly more.
- Urgency allows you to shift low-agency sustainers to high agency, thereby increasing their intent & spend.

Three core signals to help identify high-agency consumers:

1. Analytics search behaviour
2. Deep editorial engagement
3. Verification & follow through

To create urgency for low agency sustainers (and shift them to high agency) lean into Time Is Now, Owing It, Maximise & Optimise health & wellness narratives.



3

no regret actions
you should take





Target agency, as well as interest.

Expand on interest-based targeting: Demographics and stated interests provide useful reach, but layering in behavioural signals can more accurately capture real commercial intent.

Identify signals of agency: Look for analytical search, deep content engagement and verification behaviours which strongly predict readiness to purchase

For volume prioritise spend-ready Sustainers: Within the largest cohort, focus on those showing high agency, where intent converts into higher spend.



Create urgency through narratives.

Reinforce personal control: Use messaging that positions health outcomes as something individuals can actively influence.

Emphasise long-term impact: Frame decisions around future benefits, not short-term fixes or crisis moments.

Anchor ownership of outcomes: Show how action today leads to better outcomes tomorrow, increasing confidence to act now.



Use editorial as an accelerator.

Reduce uncertainty through context: Integrate additional options for consideration at various stages.

Support evaluation, not just persuasion: Use content formats that help audiences validate choices rather than pushing immediate conversion.

Align with moments of consideration: Reach consumers when they are actively thinking, researching and weighing options.



Want to know more?

Ready to unlock the growth potential of your brand? Good, so are we. **The Growth Distillery** pulls marketers out of chaos and cuts through the clutter, providing the 'need to know' of consumer behaviour.

www.thegrowthdistillery.com.au

