

APRIL 2026: HEALTH OF THE NATION RESEARCH

THE
growth
DISTILLERY

THE NEW AUSTRALIAN HEALTH NARRATIVE

THE COMPOUND INTEREST OF LIVING WELL

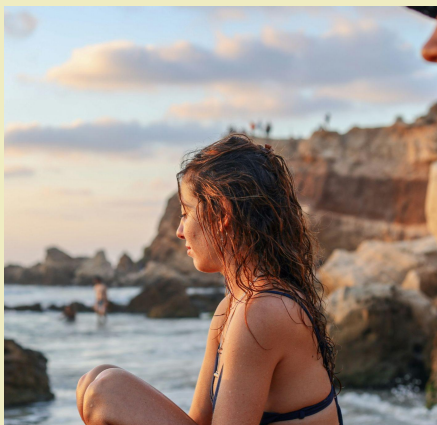
WHAT WE WILL DISCUSS

[01] **THE BIG SHIFT: THE
GREAT RECALIBRATION**

[02] **THE FOUR RS OF THE
NEW REALITY**

[03] **THE SUSTAINER GAP**

THE BIG SHIFT IS: COMPOUND INTEREST

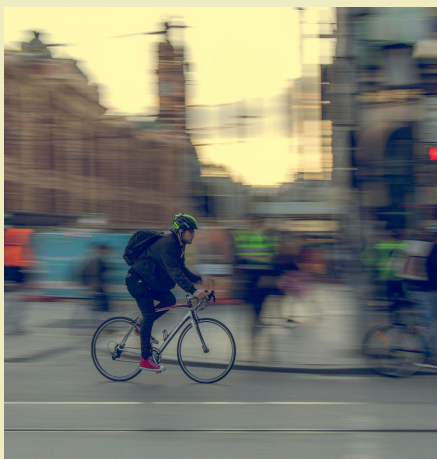


IN 2026, THE AUSTRALIAN HEALTH STORY IS MOVING AWAY FROM THE ERA OF PEAK PERFORMANCE AND TOWARD A GROUNDED REALITY OF INTENTIONAL MAINTENANCE.

WE ARE WITNESSING A QUIET REVOLUTION WHERE AUSTRALIANS ARE NO LONGER CHASING RADICAL TRANSFORMATIONS BUT ARE INSTEAD FOCUSING ON THE **COMPOUND INTEREST** OF EVERYDAY HEALTH HABITS.

THESE ARE THE SMALL, LOW-FRICTION ACTIONS THAT STACK UP OVER YEARS RATHER THAN WEEKS.

THE BIG SHIFT **NEEDS:** FUNCTIONAL INFRASTRUCTURE



THIS SHIFT DOESN'T HIGHLIGHT A LACK OF AMBITION BUT RATHER A NEWFOUND AUTONOMY AND REALISM.

AUSTRALIANS ARE PARING BACK THE NOISE OF COMPLEX, EXPENSIVE INTERVENTIONS AND **RETURNING TO FUNCTIONAL INFRASTRUCTURE:** FOOD, BREATH, AND MOVEMENT THAT FITS THEIR BUDGET.

IMPORTANTLY, THIS RECALIBRATION IS NOT HAPPENING DUE TO A LACK INTENT OR KNOWLEDGE. IT'S HAPPENING BECAUSE THE COGNITIVE AND EMOTIONAL LOAD OF CONSTANT OPTIMISATION HAS **BECOME UNSUSTAINABLE.** FOR BRANDS, THAT MEANS **SUPPORTING CONSISTENCY OVER PERFECTION.**



AS THE ERA OF MAXIMISATION GIVES WAY TO A DELIBERATE STRIPPING BACK, WE ARE SEEING THE EMERGENCE OF THE 4 R'S OF THE NEW REALITY. FOUR FOUNDATIONAL SHIFTS THAT DEFINE HOW AUSTRALIANS ARE NOW CHOOSING TO LIVE.

4 R'S OF THE NEW REALITY:

1

REDEFINING SUCCESS:
FROM EXTERNAL METRICS
TO INTERNAL HAPPINESS.

2

RECLAIMING AUTONOMY:
FROM FOLLOWING RULES
TO LEADING YOURSELF.

3

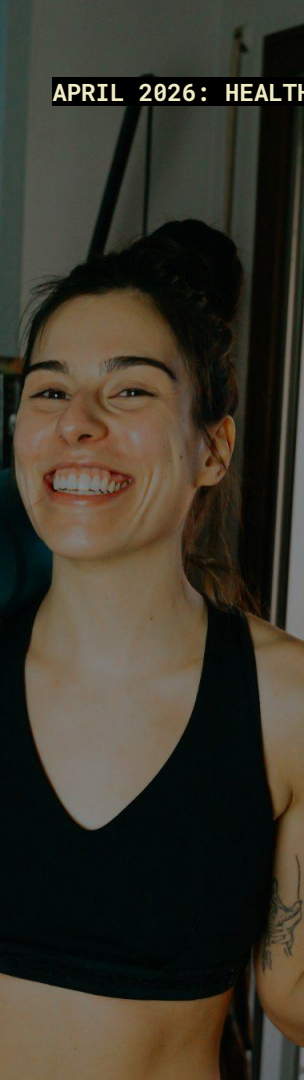
REGROUNDING FOUNDATIONS
FROM LIFESTYLE TRENDS TO
FOUNDATIONAL TOOLS.

4

REDESIGNING ACTIONS:
FROM EXPENSIVE HABITS
TO SUSTAINABLE RITUALS.

#1. RECENTERING SUCCESS

Aussies are getting real about their health, and rediscovering what is **really** important, and what is **really** good enough.



HAPPINESS IS THE NORTH STAR

"TO BE HAPPY" IS NOW THE #1 HEALTH ASPIRATION (54%), OUTRANKING WEIGHT LOSS (39%).



#1 TO BE HAPPY (54%)



#2 HEALTHY AGING (50%)



#3 HEALTHY EATING (42%)



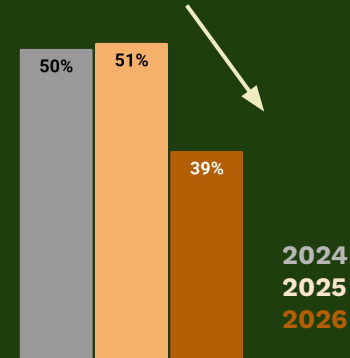
#4 REDUCE STRESS (40%)



#5 LOSE WEIGHT (39%)

AND WE NOW CARE LESS ABOUT PERFORMANCE.

MOTIVATION FROM "TANGIBLE RESULTS" DROPPED TO 39% (A -12% DECLINE).



SEEING TANGIBLE RESULTS



WE ARE SEEING THE RISE OF CONTENTMENT,

57% of Australians
are content to simply maintain
their current status quo.



AND A 'GOOD ENOUGH' MINDSET.

32% of people now feel they
are in "good to great" shape (up from
29%), as the psychological barriers to
health, like "lack of motivation," and
"difficulty maintaining routines" fall
significantly.

THIS MATTERS BECAUSE...

Brands that shift from selling transformation to validating everyday satisfaction can unlock a vast, underserved market.

The opportunity is to position products and services as partners in wellbeing, not performance benchmarks.

#2. RECLAIMING AUTONOMY

A thirst for knowledge is driving Australians to take ownership over their own health, and the result is greater confidence, understanding and independence when it comes to increasing their health.

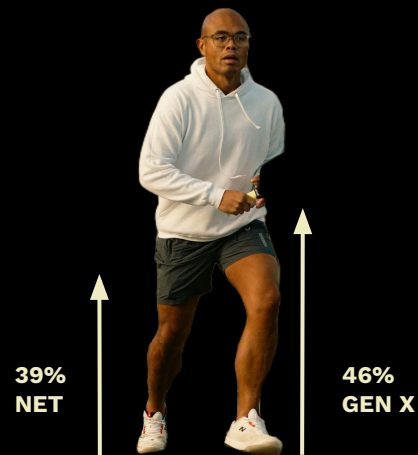
HEALTHY HABITS ARE SUSTAINED BY KNOWLEDGE, NOT INSTRUCTION.

PERSONAL RESEARCH (35%) IS NOW THE #1 INFLUENCE FOR **CONTINUING A HEALTH PRACTICE**, OUTRANKING ADVICE FROM HEALTH PROFESSIONALS (28%) AND FRIENDS (25%).



IN TURN, PERSONAL AGENCY IS RISING:

ALMOST 4 IN 10 AGREE THAT THEY INFLUENCE THEIR OWN HEALTH OPINIONS OR NO ONE INFLUENCES THEM, (ESPECIALLY FOR GEN XERS AT 46%). HIGHER THAN HEALTHCARE PROFESSIONALS (29%).



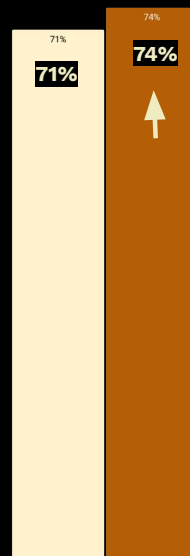
AS AGENCY BUILDS, CONFIDENCE SURGES.

NOW

3 IN 4

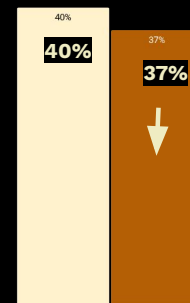
AUSTRALIANS SAY THEY FEEL **KNOWLEDGEABLE** ABOUT THEIR HEALTH AND WELLBEING (+3% YOY).

WE HAVE ALSO SEEN A DROP IN THOSE WHO WOULD LIKE TO DO MORE *BUT DON'T KNOW HOW* (-3% YOY TO 37%).



MORE KNOWLEDGEABLE

QA1. TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS? (ALL AGREE)



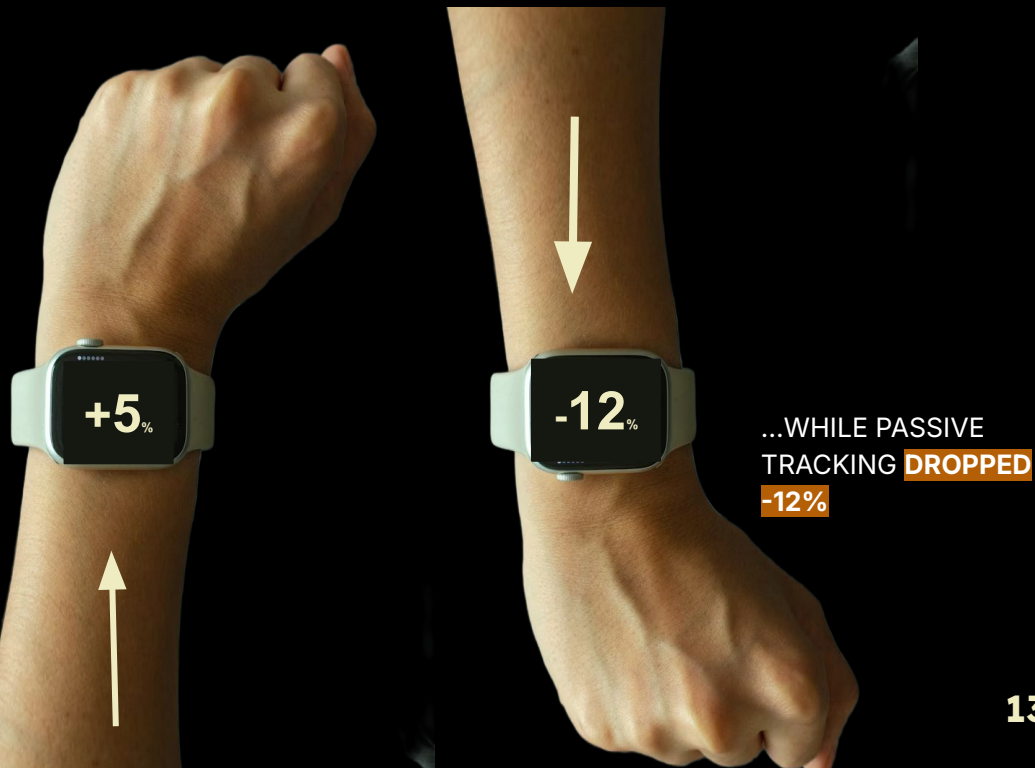
DON'T KNOW HOW

2025
2026

AND TECH SUPPORTS US TO BE MORE ACTIVE AND LESS PASSIVE.

AUSSIES ARE TAKING CONTROL OF HOW THEY USE AND OPTIMISE APPS ON THEIR HEALTH JOURNEY.

WE HAVE SEEN AN INCREASED USAGE IN PERSONALISED COACHING BY **+5%**.....



THIS MATTERS BECAUSE..

Brands that position themselves as the authority risk friction, while those that provide tools, transparency and guidance will earn trust.

The opportunity is to enable informed choice, helping consumers navigate their own health journey rather than dictating it.

#3. REGROUNDING FOUNDATIONS

Australians are intentionally simplifying their health, and paring back to what genuinely helps them feel well day to day. Favouring simpler signals, quieter practices and actions that are easy to sustain.



**THE LAST YEAR HAS SEEN A SIGNIFICANT INCREASE
IN AUSSIES ACKNOWLEDGING THE POWER OF FOOD
IN THE QUALITY OF THEIR HEALTH.**

3 IN 4

**(74%) AGREE THEIR HEALTH
WOULD BENEFIT FROM EATING
BETTER.**

**AND THIS HAS SEEN A
SKYROCKETING INCREASE OF...**

+22%

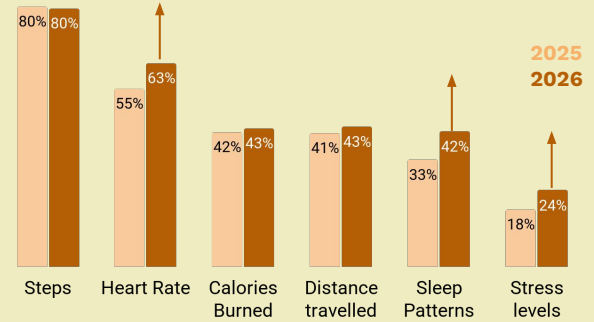
IN THE LAST YEAR ALONE.



FUNCTIONAL EATING IS NOW FAVOURED.

68%

ARE EATING FOR
SPECIFIC FUNCTIONAL
REASONS LIKE GUT
HEALTH OR ENERGY
RATHER THAN
WEIGHT LOSS.



WE ARE GROUNDING VIA INTERNAL SIGNALS.

TRACKING FOR INTERNAL METRICS
LIKE HEART RATE (63%) AND STRESS
(24%) HAS SURGED OVER OUTWARD
PERFORMANCE METRICS LIKE STEPS
OR DISTANCE.

AND GOING INWARD IS MORE THAN JUST MANAGING SYMPTOMS, IT'S MENTAL STRATEGY.

MEDITATION AND MINDFULNESS IS THE #1 HEALTH/WELLBEING PRACTICE AUSSIES ARE DOING AHEAD OF EVEN MASSAGE OR YOGA.

BUT IT'S NOT JUST A RITUAL, ITS STRATEGY, THE #1 COPING STRATEGY FOR STRESS AT

38%

1 IN 2 LIST THAT THEY ARE REGULARLY DOING SOME SORT OF HEALTH AND WELLBEING RITUALS.

1 IN 4 PRACTICE MEDITATION AND/OR BREATHWORK REGULARLY.



THIS MATTERS BECAUSE..

...In an overcrowded wellness market, brands often stack claims to justify premiums, increasing consumer mental load.

The opportunity is to strip back the noise and **own the high ROI basics** like gut health, sleep, energy and stress, becoming the foundations of wellbeing, and an easy choice for consumers.

#4. REDESIGNING ACTIONS

Cost hasn't killed health activities, but it has driven a redesign. We are modifying, not disqualifying, and seeking more every-day exercise, for everyone.



**WE DON'T QUIT,
WE RECALIBRATE.**

MORE THAN

1 IN 3

(38%) HAVE MODIFIED THEIR FITNESS HABITS TO BE **CHEAPER OR FREE**. RISING TO ONE IN TWO FOR GEN Z AND MILLENIALS.

**AND WE ARE DOING
SO THROUGH A
LOW-COST PIVOT:**

OF THOSE WHO HAVE MADE CHANGES...

67% HAVE STARTED RUNNING/ WALKING

37% HAVE STARTED HOME WORKOUTS

26% USE FREE ONLINE VIDEOS/ CLASSES

FREQUENCY IS IN, INTENSITY IS OUT.

DESPITE COST PRESSURES,
EXERCISE FREQUENCY INCREASED.
THOSE EXERCISING 4+ DAYS PER
WEEK ROSE BY

+5%.

LOW IMPACT IS KING. WALKING
REMAINS THE MOST POPULAR
ACTIVITY, WHILST ACTIVITIES LIKE
YOGA, PILATES AND STRETCHING
HAVE SEEN AN INCREASE

AND OLDER AUSSIES ARE LEADING THE CHARGE

OLDER AUSTRALIANS
ARE **THE MOST**
ACTIVE, WITH 1 IN 5
(18%) BOOMERS
EXERCISING DAILY
COMPARED TO ONLY
7% OF GEN Z.

BUILDING
STRENGTH,
FLEXIBILITY AND
LONGEVITY ARE
THEIR CORE
FITNESS
MOTIVATIONS



THIS MATTERS BECAUSE..

...A budget-driven pivot shouldn't be a permanent brand exit.

Brands who can offer a way to downscale and meet them with flexibility are the ones that turn a temporary cost-cut into lifelong loyalty and long term value.

THE CORE AUDIENCE OPPORTUNITY

The "Sustainer" Gap

THE INDUSTRY IS CURRENTLY
SUFFERING FROM A STRATEGIC
MISMATCH. WE ARE OVER-SERVICING
THE "EDGES" WHILE **NEGLECTING THE
MOST RESILIENT SEGMENT.**

FIXERS

16% of Health & Wellness
consumers.

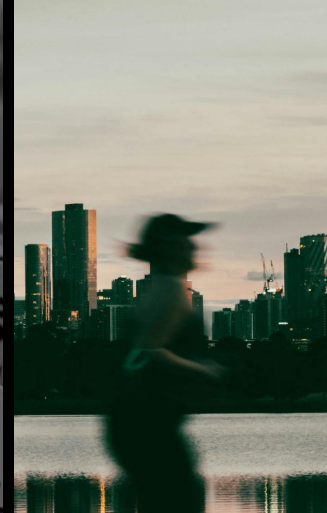


REACTIVE

Driven by medical needs or
problems to solve, making
them high-churn and
episodic consumers.

SUSTAINERS

65% of Health & Wellness
consumers.



THE CORE

Driven by maintaining
everyday wellbeing. Their
steady, preventative behaviour
creates consistent demand
but is often overlooked by
brands chasing urgency or
optimisation.

ENHANCERS

18% of Health & Wellness
consumers.



ASPIRATIONAL

Driven by optimisation,
seeking premium products
that promise performance
gains and visible progress.

WHY **SUSTAINERS** ARE THE OPPORTUNITY



THE INDUSTRY OFTEN CHASES THE HIGH-SPENDING ENHANCER OR THE SPIKES OF DEMAND FROM FIXERS, BUT MOST HEALTH BEHAVIOURS IS EVERYDAY.

SUSTAINER SHOW UP CONSISTENTLY, BUILD HABITS OVER TIME. THEY ARE THE ONES **REWRITING THE SCRIPT BY MOVING RESPONSIBILITY AWAY FROM EXPERTS AND INTO THEIR OWN DAILY ROUTINES.**

IN A WORLD OF FEWER SHARED RULES AND RISING SELF-DIRECTION, REASSURANCE IS THE NEW SUPPORT. PEOPLE DON'T NEED A BEST VERSION OF THEMSELVES, **THEY NEED CONFIRMATION THAT THEIR "BEST FOR NOW" IS ENOUGH.**



WHY SUSTAINERS MATTER



They represent the **most resilient and scalable audience** with predictable and repeat demand.



They believe in **compound interest and longevity**, offering high lifetime value.



They want confirmation that *"what I'm doing is enough."*

THEIR UNMET NEEDS:

Validation

Despite growing autonomy, Sustainers still seek validation from trusted professionals, using expert guidance as reassurance.

Support

Practical guidance that fits into everyday routines, helping them stay consistent rather than pushing constant optimisation.

Tools for steady-state wellbeing.

Simple tools that support consistency, helping them maintain healthy habits, track progress, and stay confident in their everyday approach.

THE STRATEGIC REFRAME.



AUSTRALIANS DON'T WANT TO BE THE *BEST* VERSION OF THEMSELVES. THEY **WANT PERMISSION, AND SUPPORT, TO BE WELL ENOUGH, CONSISTENTLY.**

WINNING BRANDS WILL:

1. **CHAMPION MAINTENANCE** OVER TRANSFORMATION
2. **ENABLE AUTONOMY** OVER AUTHORITY
3. DESIGN FOR **LOW-FRICTION HABITS**
4. MEASURE **SUCCESS IN CONSISTENCY AND HAPPINESS,**
NOT INTENSITY AND METRICS

METHODOLOGY



IN OCT 2025 WE CONDUCTED THE HEALTH OF THE NATION SURVEY WITH **3,078 AUSTRALIANS**, OF ALL AGES, ACROSS AUSTRALIA. THE DATA HAS BEEN WEIGHTED AND IS THEREFORE NATIONALLY REPRESENTATIVE. THIS IS THE THIRD YEAR RUNNING OF THIS RESEARCH.

WE SPOKE TO AUSSIES ABOUT A RANGE OF HEALTH RELATED TOPICS, SUCH AS GENERAL HEALTH, FITNESS, NUTRITION, MENTAL HEALTH, MENOPAUSE, ALCOHOL AND SMOKING.

THIS REPORT AIMS TO EDUCATE AND EMPOWER BRANDS, MARKETERS AND AUSSIES ON CHANGING HEALTH BEHAVIOUR (OUR 4 NEW REALITIES), A REFRAMING OF AUDIENCES AND MOST IMPORTANTLY **OFFER A GUIDE ON HOW TO ADAPT AND COMMUNICATE THROUGH THESE NEW REALITIES.**

THERE IS **SO MUCH MORE** IN THIS DATA, SO DISCOVER HOW IT MIGHT BE MORE RELEVANT TO YOU - REACH OUT TO YOUR NEWSCORP REPRESENTATIVE.



THANK YOU