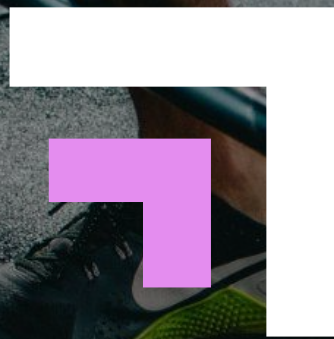




Re
frame
health



THE *growth*
DISTILLERY × TRA

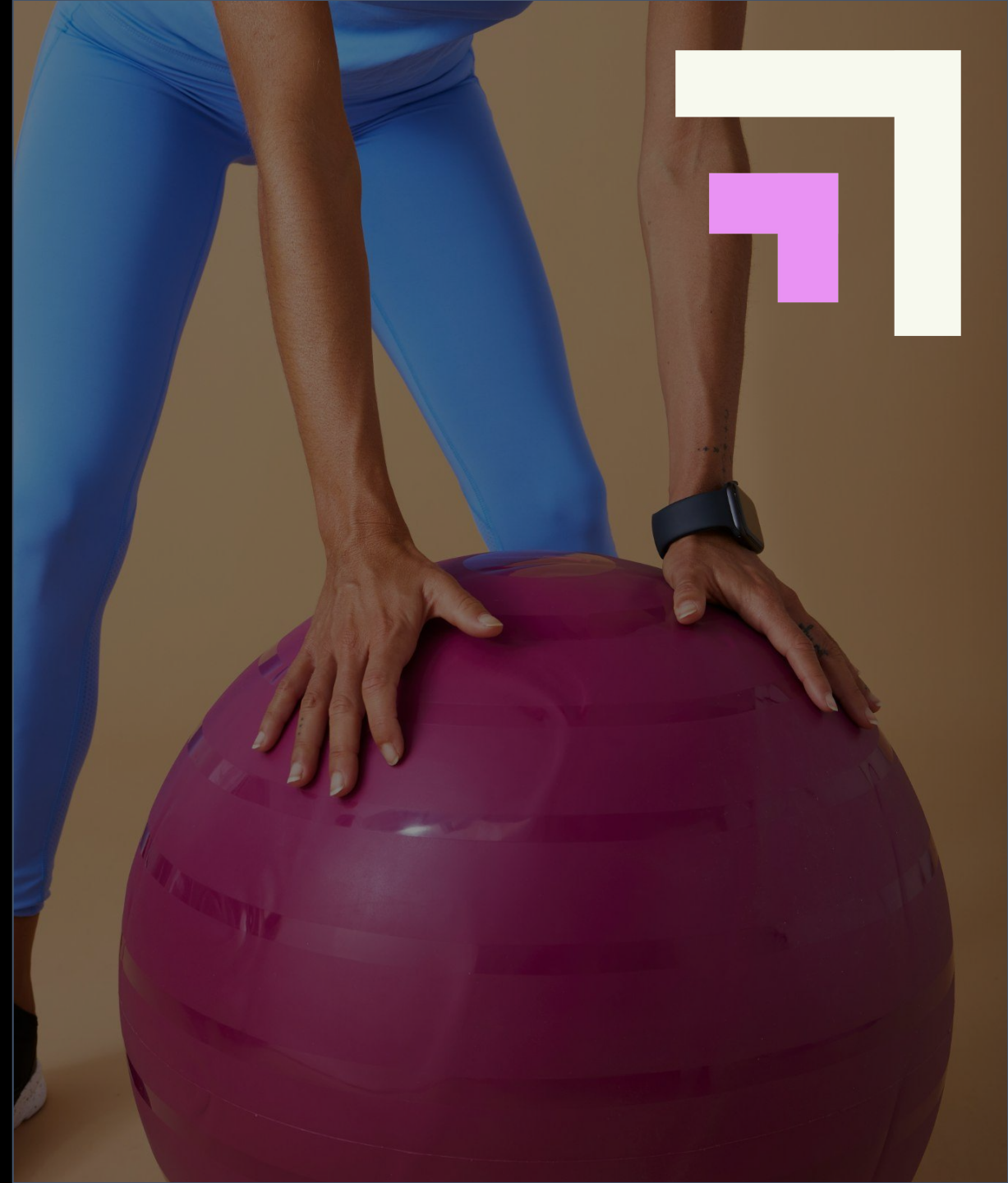
The State of the Health & Wellness Sector in 2025

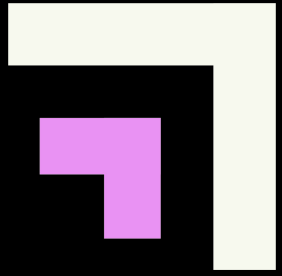
43% of Aussies are overwhelmed with choice within the sector...

46% are sceptical about health & wellness products and services...

66% believe **big H&W companies** prioritise profits over people...

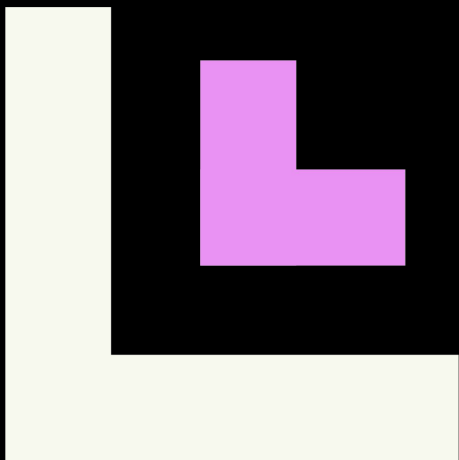
Despite this, Aussies are prioritising health & wellness more than ever.





How do you navigate and grow in 2025?

Building Confidence is key...



Why confidence...?

68%

of health consumers
only buy products they
have confidence in...

63%

are unlikely to switch
from products they
feel confident in...

Consumers are

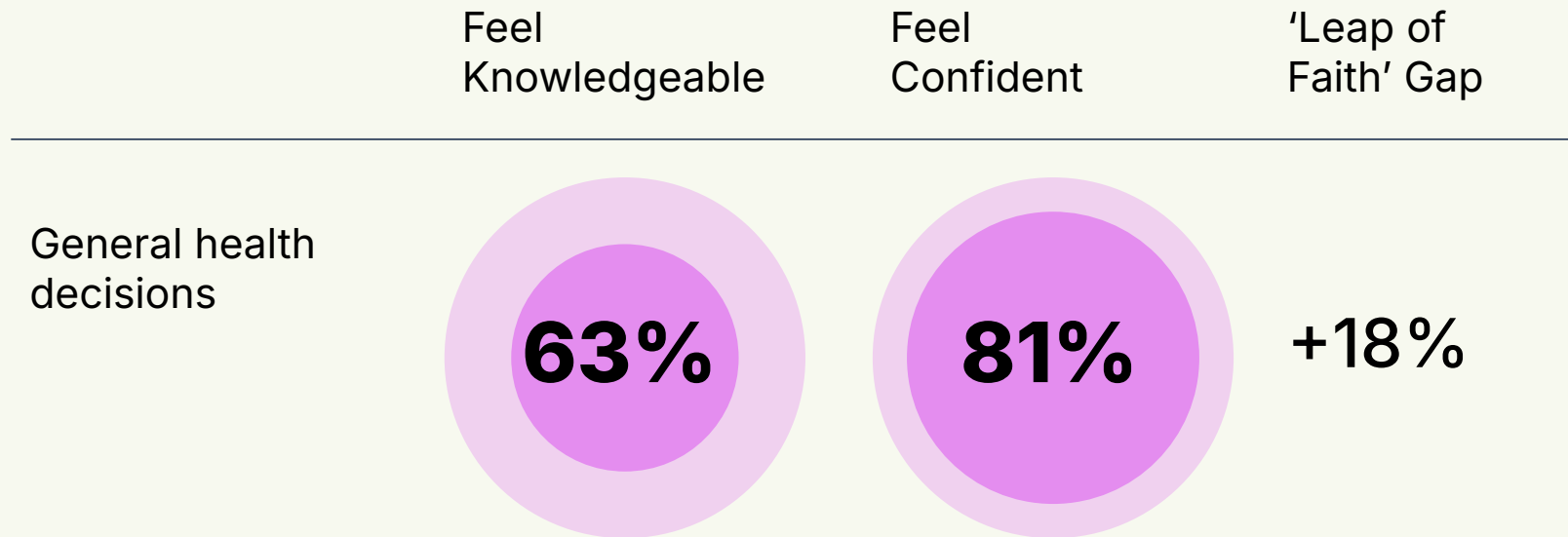
3.5x

more likely to recommend
products they have
confidence in...

Confidence helps in standing out, establishing trust and loyalty...but how do you build it?

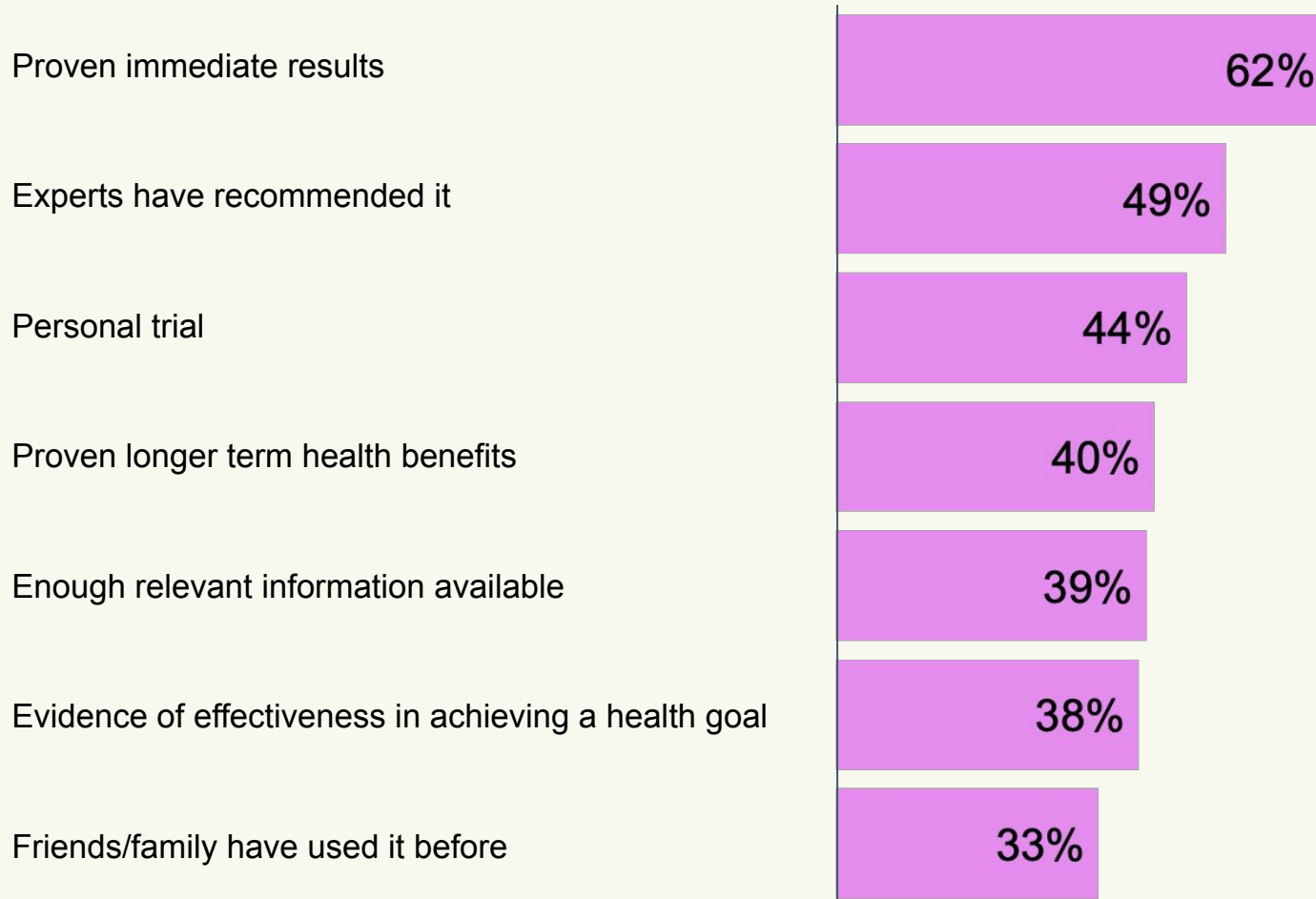
Confidence is more than just knowledge...

Interestingly, more Australians will feel **'confident'** about a decision related to their health than **'knowledgeable'**, indicating that there is more to confidence than simply knowledge.



So what builds confidence?

The top factors that make people feel confident in a health brand/product/service...



Therefore the formula of '**what builds confidence**' could be;

Confidence =
Knowledge + Credibility, Expertise
& Personal Recommendations

So now you understand the 'what', you now need to know the 'how'...

The Remedy

'How' to speak to consumers to
build confidence

With a saturated market of available products, people are seeking clarity by approaching their health along a spectrum of control to intuition

Preferred approach to using health products

Control

35%

Control

over our health is smarter and easier than ever. We have the resources, tools and knowledge to track, optimise and gamify our health.

46%

Balanced Approach

19%

Intuition

is listening to your body, taking guidance from inside rather than outside. Holistic health rather than biohacked optimisation. It can be an antidote to over-optimisation through control.

Intuition

And they are turning to what feels *personal* to drive confidence

With people's confidence on unsteady ground, they are turning to what feels closest to home, the voices that feel most familiar and trusted, to find clarity and safety.

Guidance on health is coming from the sources that feel most like us - that *are* us, or that we see ourselves in. Brands have an opportunity to leverage these voices either through real testimonials or the tone of voice in which they reach consumers.

Ourselves

We are our own best test subjects and guides. We trust our gut and experience – sometimes more so than the experts.

"I feel most equipped and confident about all the products that I currently use. This is because I have first hand experience on using these products or brands."

Female, 35-44, Older Family

Friends and family

Peers and loved ones, with shared experiences and similar contexts. The people that feel like extensions of ourselves.

"I had heard about the brand many times before and never really thought much about it. That changed when a co-worker gave it a brilliant review one day at work and then sent me a link for the free gift with purchase. That was about 2 years ago now and I've been buying the Clinique products ever since!"

Female, 26-34, Young Family

Real people

Social media and public figures that we see ourselves in, that look and feel like us. The parasocial connections.

"When I was looking to buy a sports watch I did lots of research into what was the best one for running and I got millions of results with no clear distinction. I jumped on strava and saw Macauley Jones running with a Garmin Fenix 7 and decided that was the one for me because if it's good enough for him then it's good enough for me."

Male, 26-34, Young Family

The opportunity for brands is to play this personal role, and to do so in a way that anchors into the spectrum

Brands need to play the personal roles currently held by friends, peers, influencers to have the biggest impact.

To speak to people where and how it counts.

Along the spectrum of control to intuition, these pathways range from **Disciplinarian** to **Companion**.

The **Disciplinarian** is strict, rigid, with high standards and an emphasis on accountability. This role is about continually pushing people past their limits.

The **Companion** is an equal, on the same journey and with the same imperfections. This role is about supporting people, providing a safe space for them to fail and learn.

Control
Discipline
Pathway

Companion
Pathway
Intuition

There are four pathways brands can adopt along the control to intuition spectrum

The strategies of each pathway helps build confidence in your brand and product – and ultimately drive purchase.

Control
Discipline Pathway

Intuition
Companion Pathway

1.

Driven Discipline

A firm hand with strict rules and consequences to help you go harder, faster.

2.

Approachable Authority

Expert, pragmatic support that has your best interests at heart. Authority communicated with compassion.

3.

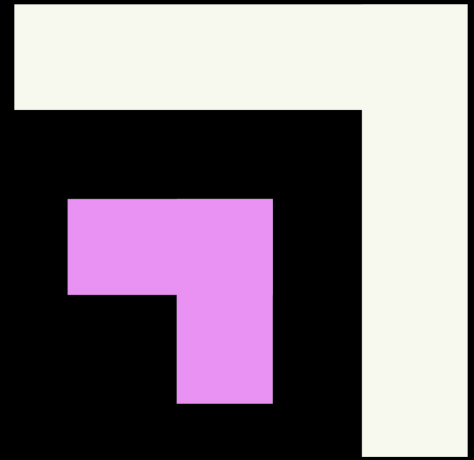
Wise Warmth

A friendly figure who's older and more experienced. They've lived through it, and have valuable lessons to share. Like a teacher and a friend.

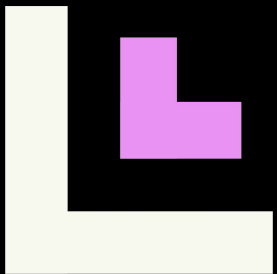
4.

Kindred Connection

Your equal who gets you, with similar struggles and goals. Supporting, uplifting and encouraging - they're on the journey with you.



How do we unlock these pathways?



Pick a pathway and drive action by using the confidence building blocks

In a context of uncertainty and mistrust, people are leaning on cognitive shortcuts to feel safe and assured.

These are confidence building blocks. Brands can leverage these to empower and drive action. The building blocks show up differently for each pathway.

Initiate

Feeling active and in control.
What's going to drive action?

Inspire

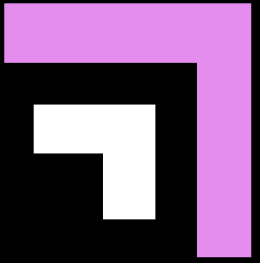
Modelling the best, the goal.
What does the journey and end result look like?

Influence

Social proof, the in-group. Who holds sway and influence?

Integrity

Build credibility by showing what you stand for and who you are.



Bringing it all together for brands

The confidence building blocks can be flexed and adapted based on the pathway you take.

Control

Driven Discipline

A firm hand with strict rules and consequences to help you go harder, faster.

Approachable Authority

Expert, pragmatic support that has your best interests at heart. Authority communicated with compassion.

Wise Warmth

A friendly figure who's older, more experienced. They've lived through it, and have valuable lessons to share. Like a teacher and a friend.

Intuition

Kindred Connection

Your equal who gets you, with similar struggles and goals. Supporting, uplifting and encouraging - they're on the journey with you.

Discipline Pathway

Initiate: Provide strictly designed plans with ambitious benchmarks that keep pushing the limit.

Inspire: Show aspirational images of success. The peak of what can be achieved.

Influence: Create a space to impress, to publicly share and compare successes.

Integrity: Prove that you're better than the competition.

Initiate: Leverage expertise to provide guidance and lower the barrier to action.

Inspire: Demonstrate authority through expertise and credentials.

Influence: Create a personal connection without compromising on authority. Practice deep listening.

Integrity: Showcase your credentials, back up your promises with evidence.

Initiate: Provide real-life, lived experience to inspire action and advice from someone who's gone through it.

Inspire: Showcase holistic, long-term lifestyle benefits. Focus on the big picture rather than short-term gains.

Influence: Create a sense of family and friendship via warmth and relatability.

Integrity: Make it clear that you stand for something bigger, communicate your mission.

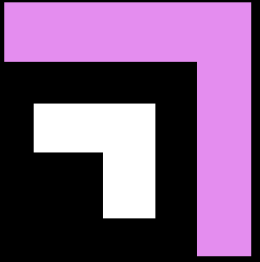
Companion Pathway

Initiate: Use personal case studies and provide the 'full picture', including pros and cons.

Inspire: Use relatable images and stories, showcase imperfections and struggles.

Influence: Create and tap into supportive communities of like-minded people.

Integrity: Show the people behind the scenes, the human stories and personal values.



Which narrative fits best with your category?

Control

Driven Discipline

A firm hand with strict rules and consequences to help you go harder, faster.

Approachable Authority

Expert, pragmatic support that has your best interests at heart. Authority communicated with compassion.

Wise Warmth

A friendly figure who's older, more experienced. They've lived through it, and have valuable lessons to share. Like a teacher and a friend.

Intuition

Kindred Connection

Your equal who gets you, with similar struggles and goals. Supporting, uplifting and encouraging - they're on the journey with you.

Discipline Pathway

- 54% Fitness products
- 53% Wellness products
- 51% Vitamins
- 44% Health insurance
- 44% Beauty/cosmetics
- 40% Medical products/services
- 37% Skin care

- 70% Wellness products
- 69% Vitamins
- 68% Health insurance
- 67% Fitness products
- 60% Beauty/cosmetics
- 57% Medical products/services
- 57% Skin care

- 70% Wellness products
- 63% Fitness products
- 62% Health insurance
- 53% Vitamins
- 52% Medical products/services
- 51% Beauty/cosmetics
- 50% Skin care

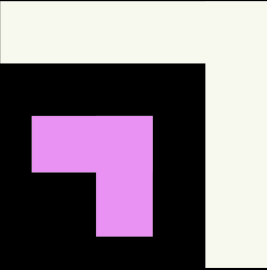
Companion Pathway

- 74% Fitness products
- 71% Wellness products
- 67% Health insurance
- 66% Vitamins
- 61% Beauty/cosmetics
- 58% Skin care
- 55% Medical products/services

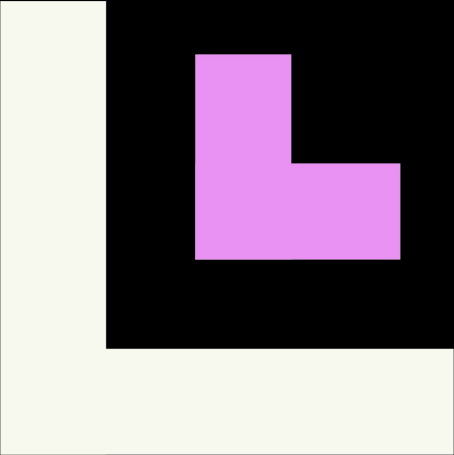
The Health Plan

A prescription for brands to
cross the confidence line





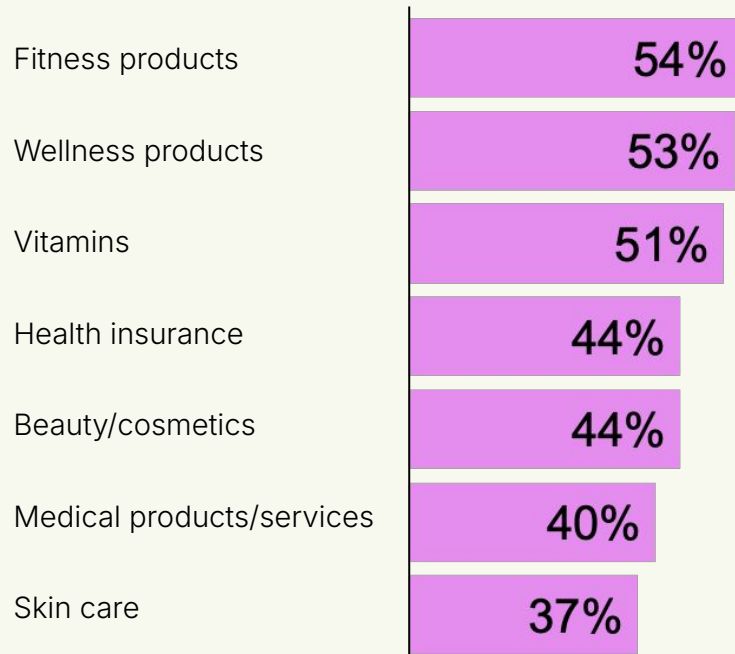
Driven Discipline



Driven Discipline

Telling it like it is

What is the category's right to play?



Source: GIC x TRA Reframe Health
Base: n= 1,795

Looks like

Aspiration

Show aspirational examples and models of health and wellness, the best of what can be achieved.

But keep it grounded. Mirror your target audience. Show people an idealised version of themselves – them but better.

Focus on the best-of-the-best in products and services – top-of-the-line gear, latest models and early-adopters.

Model pride, confidence, without condescension.

Sounds like

Motivation, personalisation, accountability, aspiration, honesty

Use language like:

- Holds me accountable
- Points and rewards for hitting my goals
- Keeps me on a positive tangent
- Reminds me that they're always there
- Tells me to speed it up
- Keeps me on track
- Motivate me and drive me
- Guidance I wouldn't be anywhere without
- Not afraid to tell you how it is
- Personal best

Feels like

Accountability

Highly driven, focus on achievement, dips in performance will be noticed and addressed. Don't allow letting things slip.

Rational and clear-sighted. Always tells it like it is.

The fitter-than-thou friend. A health model or goal that is just out of reach, just out-running you – but still offering the potential to catch-up.

Pushing people to go further, reach a new PB.

Shadow sides

Disordered discipline

Accountability that's focused on the wrong goals, that creates or enables an unhealthy mindset of hyper-focus on metrics over health.

Alienating aspiration

Aspirational images that go too far, that seem unrealistic and unachievable, that demotivate and alienate.

Driving *discipline* through the confidence building blocks

Initiate

- Develop targeted health plans personalised to individual needs and goals.
- Set clear and ambitious benchmarks to encourage progression.
- Gamify the experience by introducing rewards for achievements and 'punishments' for setbacks.

Inspire

- Showcase aspirational images and personalities to model what can be achieved.
- Provide tools and data to enable people to track and measure their progress and monitor daily health metrics.

Influence

- Use before and after pictures to bring to life the transformation process.
- Enable comparison by creating public forums and platforms for people to share their health achievements and track the achievements of others (i.e. Strava).

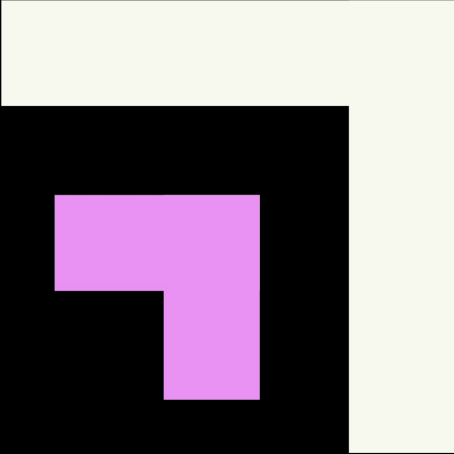
Integrity

- Be bold about being better than the competition, communicate how you're the best of the best.
- Position yourself as ahead of the curve, pioneering and geared towards early adopters.
- Provide proof of how you help people go further, be better. Demonstrate what people can achieve, showcase smashed targets, PBs, high-achievement.

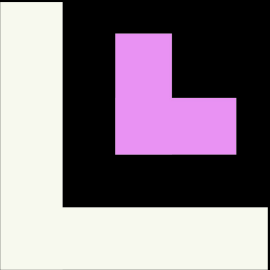
"For me, I really love my Apple watch and consider it an essential part of my journey. I like the fact that I can see what activity I've done each day, my trends in exercise, my heart rate, etc.

For me I enjoy being held accountable in this sense - being able to view my activity on the app linked to my phone so I can see where I've dropped off on the exercise front/periods where I've maintained healthy habits and routines."

Female, 18-25, DINK



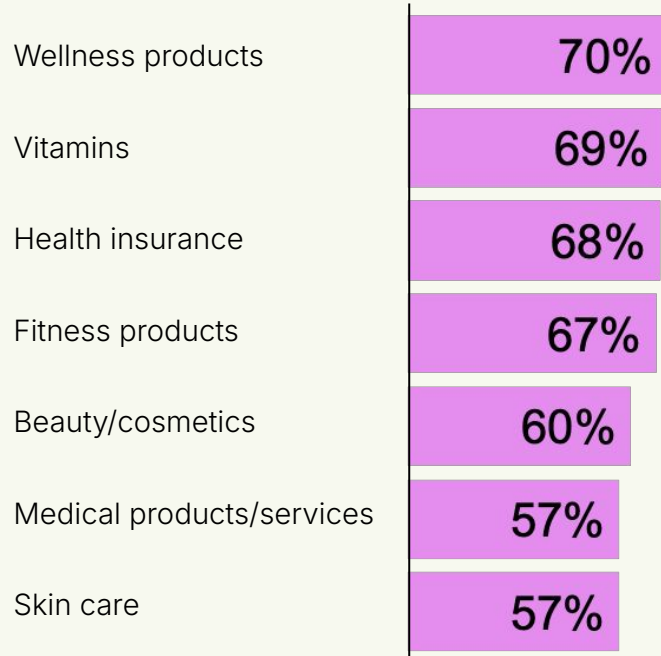
Approachable Authority



Approachable Authority

Guidance with care at the core

What is the category's right to play?



Source: GIC x TRA Reframe Health
Base: n= 1,795

Looks like

Expert care

Authoritative health and medical figures, expert guidance.

Showcase expertise and authority through skills and expertise, new ways of thinking. Not about demographics, but about achievements.

Provide thought-leadership - books, articles, podcasts. Publications and appearances add credibility.

Communicate accomplishment without showiness or flashiness.

Sounds like

Dependability, adaptability, mentorship, reliable, resilient

Use language like:

- Teaching me to use my body correctly
- Look after my health and wellbeing
- Genuinely believe in what they do
- Depend a lot on them
- Watchful eyes
- Dedicated
- Work overtime for me
- Mentor
- Calm, dispassionate
- Compassionate
- Challenging

Feels like

A pragmatic push

Disciplined, but not pushing people past their limits. Calm, grounded guidance.

A focus on sensible achievement, not setting goals for the sake of it but focusing on goals with tangible, healthy rationales.

Caring for others as the core motivation. Wanting to use their expertise to help others. Have your best interests at heart.

Focus on the feeling of learning, discovery, tips and tricks. Being guided by experts to a goal.

Shadow sides

Disconnected Doctor

Expert who doesn't care about you and disregards or devalues your experiences and needs. Thinks that they know more than you, and takes a one-size-fits all approach to health rather than personalised plans that centre your wellbeing.

Driving *authority* through the confidence building blocks

Initiate

- Provide expert guidance backed by relevant scientific rigour. Share context and meaning for health goals and actions.
- Share actionable and accessible tips and tricks to create a low barrier to entry for action.
- Leverage expertise to design easy access points for people to learn about a product or service i.e. online quizzes.

Inspire

- Showcase expertise and credentials. Provide proof for why and how you are an authority.
- Express passion about your area of expertise. Make it clear that it's something cared about, not just known about.

Influence

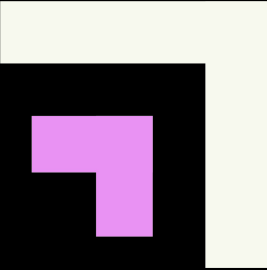
- Create a personal connection while remaining in a position of authority. Connect with your audience on an emotional level.
- Demonstrate deep listening and understanding for individual needs and stories.

Integrity

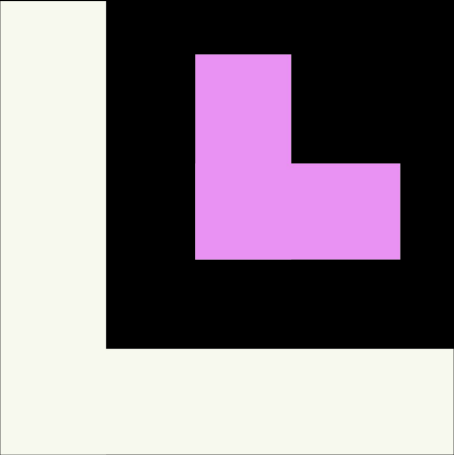
- Showcase formal expertise and credentials.
- Demonstrate rigour by being independently verified, scientifically backed.
- Communicate with clarity - formal expertise doesn't mean jargon. Show how you're backed by science, but make it easy to understand. Be accessible, not impenetrable.

"They are continuously educating themselves and are up to speed with latest research and practice. I trust them totally. They genuinely take interest in every individual and I value that the most. I am not just somebody that pays money for their services - they want me to be healthy and well."

Female, 70+, Empty Nester



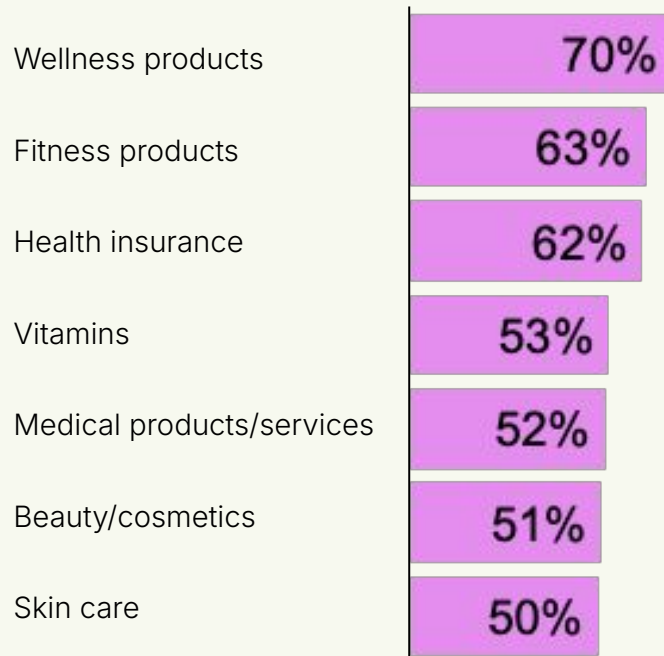
Wise Warmth



Wise Warmth

Like a teacher and a friend

What is the category's right to play?



Source: GIC x TRA Reframe Health
Base: n= 1,795

Looks like

Equal with experience

A peer with lived experience.

Older, wiser, but down to earth. Relatable. Wisdom with humour.

Casual and approachable, worn-in. Tried and tested. A focus on quality and comfort rather than style and flashiness.

Sounds like

Practical, nurturing, inspiring, warm.

Use language like:

- Can always rely on them
- Learn valuable life lessons
- Warm and kind, relaxed and casual
- Giving a great big hug and a warm delicious meal
- Teaching
- Straightforward advice
- Articulate and compassionate
- Ideas on how to cope in an ever-changing world
- Knows from experience
- Walks the talk

Feels like

Space to grow

An equal rather than an authority figure, but one that is further along in their health journey.

It's experience not expertise. They're not an expert, but they've been through things and come out the other side with learnings to share.

Low pressure, lots to learn.

Providing insight and letting people decide on their own rather than telling them what to do.

Affectionate, warm, comforting, kind.

Shadow sides

Pyramid scheme

Using 'lived' evidence to sell products that don't deliver. Fabricated personal journeys with products and services and predatory mentorship that's designed to exploit rather than help grow.

Driving *wisdom* through the confidence building blocks

Initiate

- Provide tangible examples of real-life/lived experience with health issues and actions.
- Demonstrate how you live or have lived what you are recommending, and the impact of this.

Inspire

- Showcase the long-term outcomes of health actions and behaviours. Demonstrate holistic lifestyle benefits rather than immediate, short-term gains.
- Express a clear life philosophy, communicate a set of values and what you stand for.

Influence

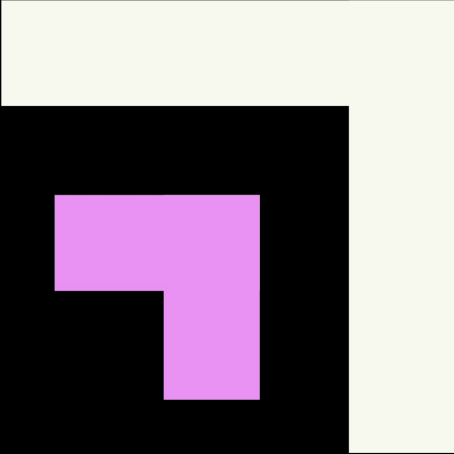
- Create a sense of family, friendship and connection through warmth, humour, relatability. Mirror people's journeys, while bringing a fresh, outside perspective having gone through something similar.

Integrity

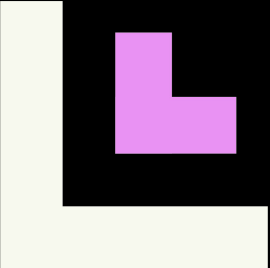
- Put your mission statement front and centre, communicate your philosophies and make it clear you stand for something bigger.
- Build authority through lived experience. Show how expertise is earned through first-hand experience.

"An older lady maybe like a grandmother, who is wise, older in age, has discovered so many healthy habits and tricks that help you live with purpose and a healthier version of you."

Female, 70+, Empty Nester



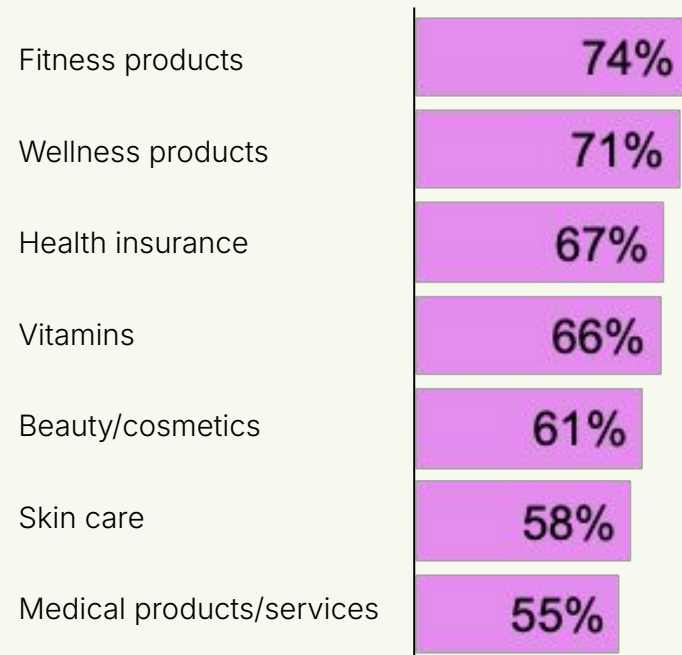
Kindred Connection



Kindred Connection

Someone who gets you

What is the category's right to play?



Source: GIC x TRA Reframe Health
Base: n= 1,795

Looks like

You, but (slightly) better

Show people that look like your target audience, in contexts similar to theirs.

Showcase imperfections, the rough edges as well as the beauty.

Bring out the sense of humanity, the vulnerabilities and the ways they're 'just like me'.

Make it real. Can still be aspirational, idealised, but needs to be grounded in a feeling of authenticity.

Sounds like

Optimistic realism. Authenticity, balance, connection, normalise, relatable, genuine

Use language like:

- Empowering me
- Positive and encouraging on my journey
- Not here to make things prettier than they are
- Feels real and genuine, not manufactured or fake
- Writes straight from her brain
- Relatable and conversational
- Balance exists between being healthy and having fun
- Always by my side, highly dependable
- Not striving for perfection, just healthier habits with time and consistency
- Helps normalise tribulations and triumphs along the journey
- Funny, light

Feels like

Real and raw

A safe space that people can show up to as themselves, not having to live up to a certain standard.

Ease and relaxation. Setting down your burdens and letting it all hang out.

Humour, fun, relatability.

Showcase a set of shared values and share relatable struggles and goals. Foster a sense of understanding.

Avoid seeming pretentious or putting on an act. It's about connection, not performance.

Shadow sides

Inauthentic influencer

Giving health advice without building credibility or trust. Spruiking products or services just to make money, not because they actually use them or believe them.

Misleading people or faking what they do. Presenting a 'perfect' life that doesn't show what actually happens behind the scenes.

Driving connection through the confidence building blocks

Initiate

- Use first-hand, personal case studies with real-life examples of benefits and side-effects.
- Focus on the good *and* the bad to enable people to feel in control of their decision-making.
- Ensure alignment with personal brands - if coming from a person, a product or service needs to align with their values and behaviours.

Inspire

- Include imperfections in imagery. Focus on what looks 'natural' rather than 'fake'.
- Focus on achievability and balance more than aspiration.
- Provide insight into personal lives beyond the product or service. Spotlight the human story.

Influence

- Create communities of like-minded peers on a shared journey. Lean into forming connections.
- Tap into platforms with established, close-knit communities i.e. social media, podcasts.
- Showcase roots in and contributions to local spaces and communities.

Integrity

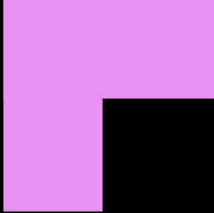
- Put a human face on the brand. Make the 'why' of a brand or product personal and emotional - tell a story.
- Build trust by showing what happens behind the scenes, make people feel like they have insider access and the full picture.
- Live your values - don't just tell people what you stand for, demonstrate how these show up in real life.

"Kayla Itsines co-founder of the Sweat App. I love what she represents and I follow her posts on Facebook. She is now a mother of two, and aside from watching her beautiful family grow, she has a realness about her. I feel like by seeing her go through the rollercoaster of parenthood, seeing her cooking with her family (sometimes chaotic cooking with a toddler), or when she admits that she's been struck down with illness going through her household and also asks her Followers for advice, that she is living the mum life and she is real and personable."

Female, 35-44, Older Family

"Beau Miles has a particular way to motivate you but remind you that a hybrid solution exists at the same time. He is fit, healthy and very determined (borderline ADHD) but reminds you that you can still have a beer, have a coffee or have some maccas every now and again. "Rome wasn't built in a day, they took lunch breaks". When I watch Beau Miles it reminds me that a balance exists between being healthy, being serious, having a good time with your mates and being a good person all at once."

Male, 26-34, Young Family



Thank You

