

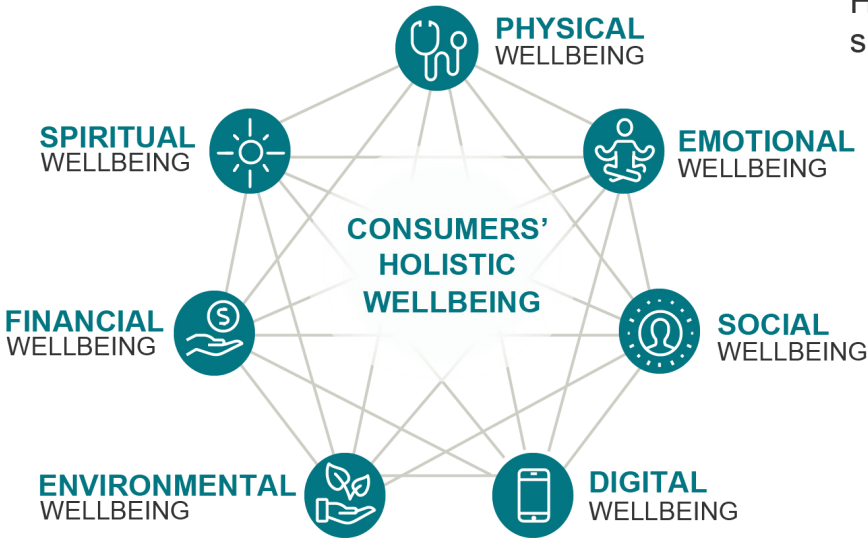
Health, Rewired

Consumer wellbeing is at an inflection point: Americans are more empowered and engaged in their health than ever, but they are navigating that responsibility in a context of strained trust, rising costs and fragmented support. As a result, consumers are taking health into their own hands.

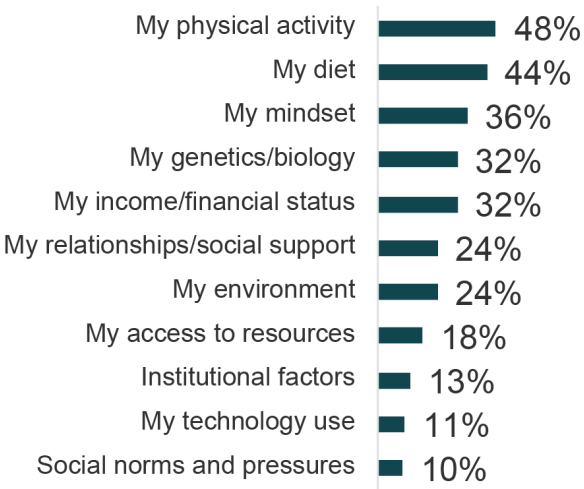
For consumers, wellbeing is more important, more urgent and viewed more holistically...



I am concerned that my unhealthy habits will soon catch up with me



Has Greatest impact, positive or negative, on shaping personal health wellbeing outcomes

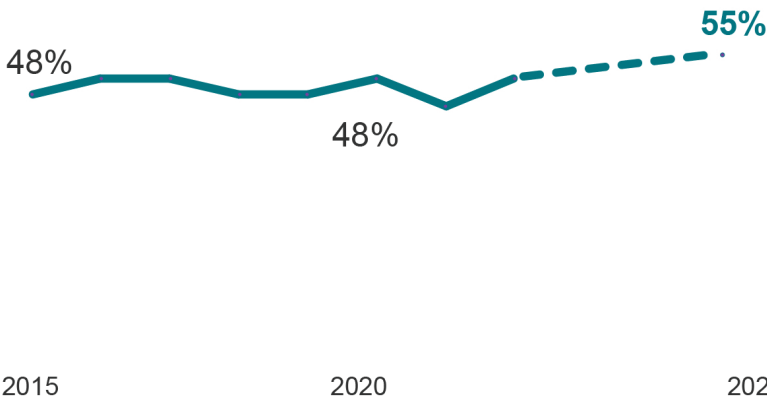


...But the broader system feels unreliable, unaffordable and misaligned to their needs



Health industry trust gap*—the 2nd highest gap of any industry measured

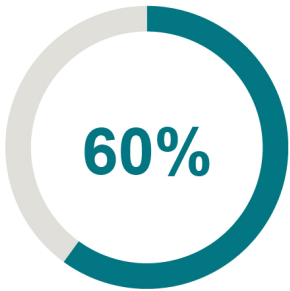
Very/fairly worried about the cost of healthcare



58% of Gen Zers and 49% of Millennials say doctors have downplayed or ignored their health concerns—compared to just 28% of older generations

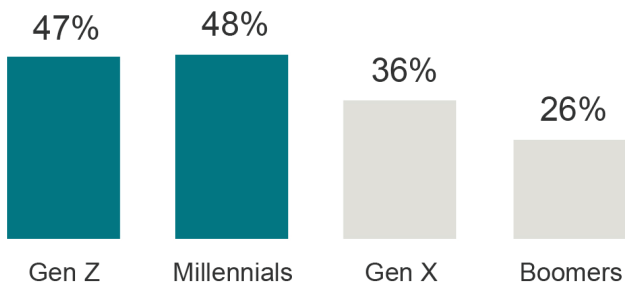
Out of this tension, a clear response has emerged—people are taking health into their own hands

Consumers are increasingly assembling their own wellbeing ecosystems by drawing on new inputs, tools, mindsets and practices that allow them to tailor health management to their individual needs.



Of Americans say when it comes to their wellbeing, they tend to **trust their instincts** vs. experts—up from 52% in 2024

AI-driven wellbeing recommendations are as trustworthy as advice from a human doctor



*calculated as (I have a lot/some trust in brands in this industry)—(Trust is extremely/very important when engaging with this industry).

Source:
Kantar. (2025). *Kantar U.S. MONITOR*, 2025 (Q4). Kantar.