

Health & Well-being in a Changing World

A GlobeScan Shared Research Initiative

October 2026



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Background and Approach

Foreword

This report presents select findings from GlobeScan's Health & Well-being Shared Research Initiative, a collaborative effort involving a group of companies with a shared interest in understanding how people think about health and well-being today, the factors that influence their everyday experiences, and the role that different institutions can play in supporting healthier lives. The participating organizations represent a range of sectors with different connections to health and well-being, coming together to explore a common set of questions through shared research.

Health and well-being are shaped by many aspects of daily life. Alongside physical and mental health, people's experiences are influenced by access to care, products and services, the affordability of healthy choices, food and nutrition, the information available to them, and environmental and climate-related conditions. They are also shaped by everyday choices, routines, and circumstances that can either support or hinder the ability to maintain health and well-being.

The initiative was created to provide an evidence-based understanding of how people experience these influences in their daily lives. To explore these questions, GlobeScan surveyed 10,000 people across ten global markets, examining the factors that have the greatest impact on health and well-being, the barriers people face in maintaining it, the relationship between food and health,

the impacts associated with environmental and climate-related issues, and the sources they trust for health information.

The report highlights five key findings from the research. Together, they provide insights into how people are experiencing health and well-being today, the priorities and barriers that shape their decisions and behaviors, and the factors that influence their everyday health and well-being.

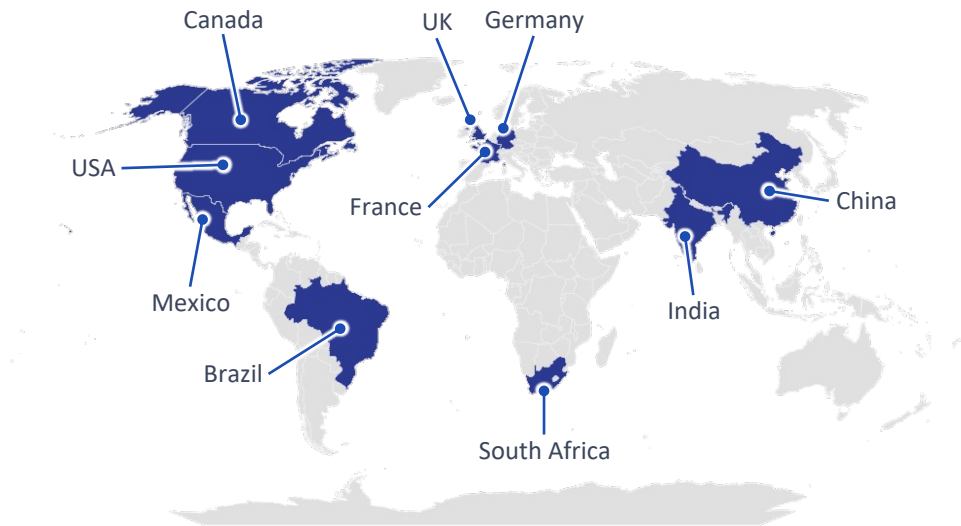
We thank the companies below for their collaboration and support of this shared research initiative.

- | | |
|----------|-----------|
| • Haleon | • PepsiCo |
| • Kenvue | • Reckitt |

About the Research

Online Survey

- Online survey of $n=10,000$ general public respondents across ten global markets (Brazil, Canada, China, France, Germany, India, Mexico, South Africa, USA, UK)
- Respondents were recruited from online panels, and the survey was available in Portuguese, Spanish, French, Mandarin, and German.
- Sample was designed and weighted to be nationally representative.
- In field June 11–21, 2026





Executive Summary

Executive Summary: Five Key Findings on Health and Well-being

- 1. Sleep is the biggest lever, and the one thing everyone agrees on.** Good sleep tops the list of influences on day-to-day health (51%) and well-being (49%), and ranks first across markets, age groups, and genders.
- 2. Most people want to improve their health, but barriers often get in the way.** Nearly nine in ten people want to take better care of their health and well-being, but fewer (73%) feel confident managing everyday health issues on their own. Tiredness, stress, time, responsibilities, and cost are common barriers.
- 3. "Eating well" means fresh, not perfect.** Almost nine in ten people connect what they eat and drink to their health and well-being. Consumers take a broad and practical view of healthy eating, centered on fresh foods, key nutrients, and a balanced mix of foods.
- 4. Climate change is becoming a personal health issue.** Extreme heat (34%) and air pollution (29%) are among the most commonly reported climate-related impacts on health and well-being, and many people report changing behaviours and expectations in response: 37% now avoid going outside at certain times, and 45% expect health costs to rise as conditions worsen. The impacts vary considerably across markets.
- 5. Health professionals are the most trusted sources.** Doctors/nurses (85%), pharmacists (79%), and other health care professionals (78%) are the most trusted sources of health information, well ahead of other actors and institutions. While government and global health organizations are trusted by many, people are often more likely to seek information from pharmacists, friends, and family. Younger generations are also more likely to trust and use people they know online and find digital health tools useful, especially when comparing Gen Z with Baby Boomers.



Finding 1:

**Sleep is the most
universally
important driver of
health and well-
being**

Most adults rate their health as good or very good.

Most adults start from a positive base. Seventy-four percent rate their current health as good or very good, and self-rated well-being follows closely behind at 69 percent.

The small difference between the two measures suggests that people see health and well-being as intertwined rather than distinct aspects of their lives.

WHAT IT MEANS

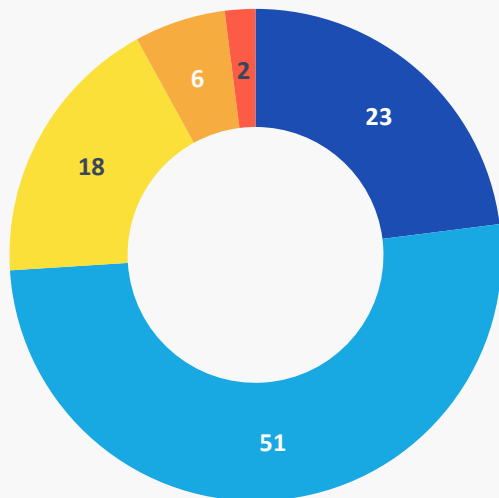
The close relationship between health and well-being suggests that people experience them as part of the same overall picture rather than as separate concerns. As the findings on the next page show, everyday routines and behaviors are likely to influence both, making them important levers for improving people's quality of life.

Perceived Rating of Health and Well-being

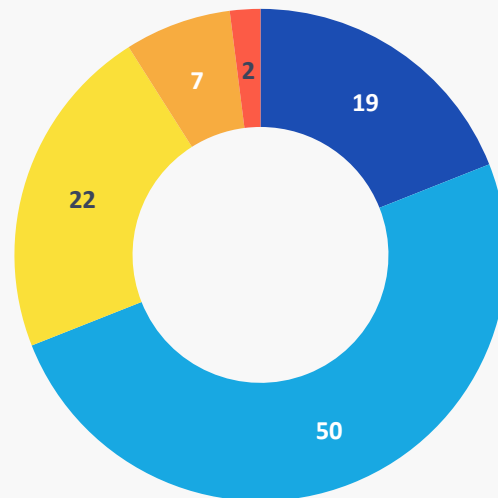
Total, 2026

Very good Good Neither good nor poor Poor Very poor

Health



Well-being



Q1.1. Overall, how would you rate your current health, would you say it is very good, good, neither good nor poor, poor, or very poor?

Sleep, emotional well-being, and physical activities are top influences on daily health and well-being.

Sleep is the biggest single factor affecting health and well-being. Good sleep or rest tops the list of influences on day-to-day health (51%) and on well-being (49%), and ranks first in every one of the ten markets surveyed.

WHO SEES IT DIFFERENTLY?

There are no gender or age differences for this finding. Sleep ranks first for women (51% for health / 49% for well-being) and men (52% for health / 50% for well-being), and in every age group from 18–24 to 65+ (ranging from 47%–53% citing it as the top mention for both health and well-being).

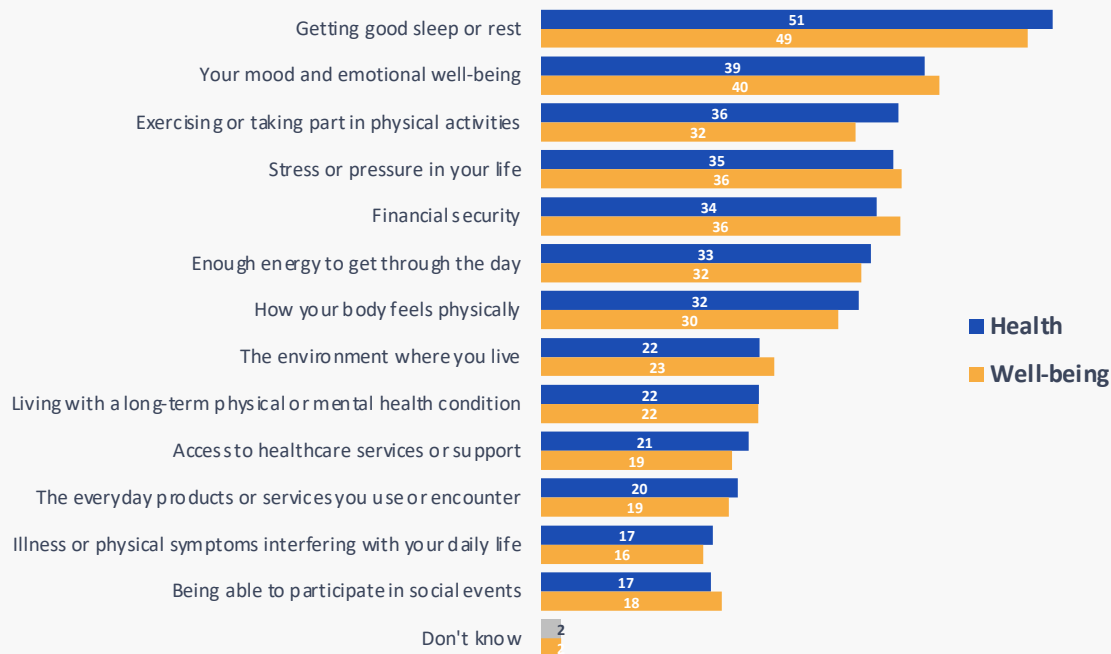
Other factors, such as stress, energy levels, and physical health concerns, tend to vary in importance across different groups. Sleep is different: it ranks first across age and gender groups, making it one of the few truly universal drivers of health and well-being.

WHAT IT MEANS

Sleep, emotional well-being, and physical activity emerge as closely linked and consistent drivers of health and well-being. This suggests that efforts to support healthier daily routines may have benefits that extend across multiple aspects of people's lives.

Biggest Impacts on Day-to-day Health and Well-being

Total, Select Up to Three, 2026



Q1.2. Which, if any, of the following have the biggest impact on your day-to-day **health**?
 Q1.4. Which, if any, of the following have the biggest impact on your sense of **well-being**?

Given their dominant impact on health and well-being, it is not surprising that sleep and physical activity lead everyday well-being routines.

People do not just feel the effects of sleep; they recognize the need to manage it. Rest and sleep is named the most important everyday routine for maintaining health and well-being, ahead of physical activity and diet.

WHO SEES IT DIFFERENTLY?

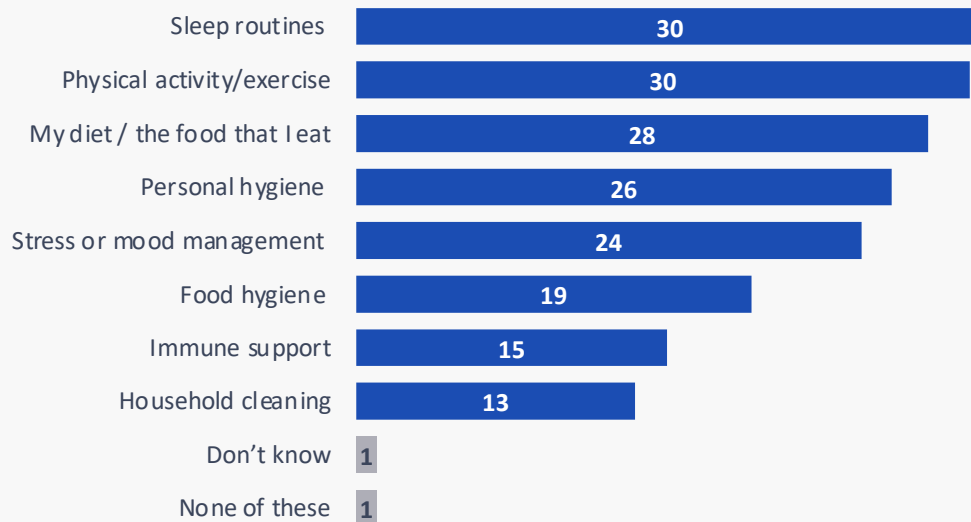
There are relatively few demographic differences in the routines people consider important for maintaining health and well-being. Across most groups, sleep, physical activity, and diet consistently emerge as the leading routines, suggesting broad agreement on the foundations of a healthy life.

WHAT IT MEANS

While people may differ in their health circumstances and challenges, there is remarkable consistency in the routines they believe support health and well-being. Sleep, physical activity, and diet are widely recognized as the cornerstones of maintaining good health.

Most Important Everyday Routines

Total, 2026



Q2.1. Which everyday routines are most important to maintaining your health and well-being?



Finding 2:

Most people want to improve their health, but barriers often get in the way

Intent to improve health is near-universal, but confidence to act on it trails.

Almost everyone wants to take better care of their health and well-being: 89 percent agree they would like to do more. While a majority (73%) also feel some level of confidence managing everyday health and well-being issues on their own, confidence does not fully match people's aspirations, suggesting there is room for additional support, information, and resources.

WHAT IT MEANS

Most people feel some confidence in managing their everyday health and well-being, but confidence does not quite match the near-universal desire to do more. The gap suggests that while people are willing to take responsibility for their health, many would benefit from additional support, information, and resources to help them act on that intent.

For businesses and institutions, the opportunity is less about motivating people to care about their health and well-being and more about helping them overcome practical barriers and making healthy choices easier to maintain in everyday life.

Agreement with Statements about Everyday Health

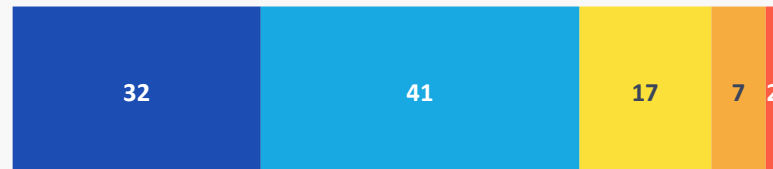
Total, 2026

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree

I want to take better care of my health and well-being



I feel confident managing common health and well-being issues on my own



Q2.5. To what extent do you agree or disagree with the following statements about your everyday health?

Confidence to act on health intent follows income and location.

Intent is universal; confidence is not, and it is unevenly distributed. Seventy-nine percent of higher-income respondents feel confident managing everyday health issues against 67 percent of those with lower incomes, and 77 percent of urban adults against 66 percent in rural areas.

WHAT IT MEANS

As people continue to take an active role in managing their well-being, not everyone starts from the same position. Higher-income and urban respondents appear better equipped to navigate everyday health needs, while lower-income and rural populations may face greater challenges. That is an important nuance in the debate about personal responsibility: empowerment is only meaningful when people have the resources, access, and support to act. The challenge is to build confidence and capability across all communities rather than risking widening the gap.

Confidence Managing Everyday Health, by Income and Location

Total, “Strongly” + “Somewhat Agree,” 2026



Lower income

67%

Higher income

79%



Rural

66%

Urban

77%

Q2.5. To what extent do you agree or disagree with the following statements about your everyday health? – I feel confident managing common health and well-being issues on my own

Tiredness and stress are the leading barriers to taking care of health and well-being.

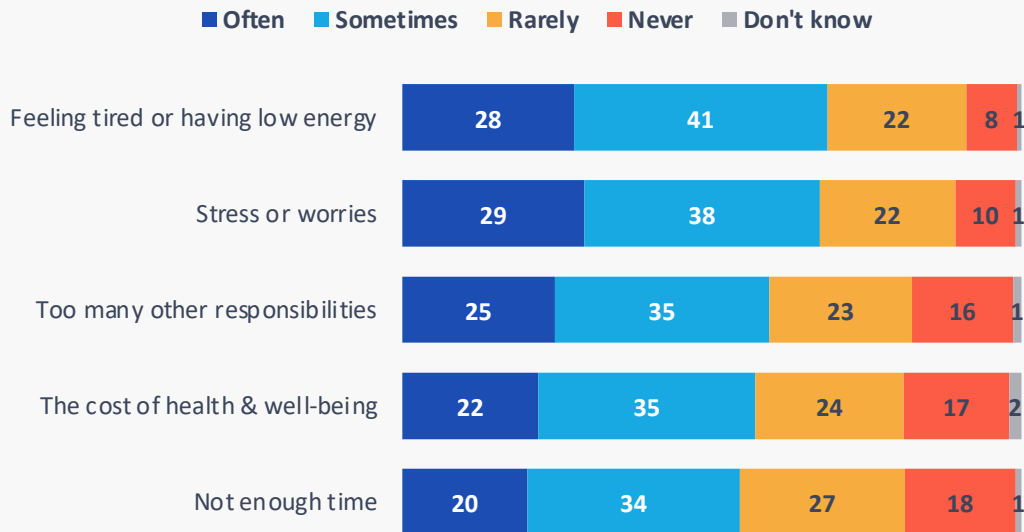
A range of everyday pressures can make it difficult for people to take care of their health and well-being. Feeling tired or low on energy (69%) and stress or worry (67%) are the most commonly cited barriers, but many also point to competing responsibilities (60%), the cost of health and well-being (57%), and lack of time (54%).

WHAT IT MEANS

People are generally motivated to take better care of their health and well-being, but everyday pressures can make it difficult to put good intentions into practice. Tiredness and stress are the most common challenges, yet practical factors such as responsibilities, time, and cost also affect a majority of people. Creating healthier lives is therefore not only about awareness, but also about helping people overcome the barriers that make healthy choices harder to maintain.

How Often Each Factor Makes Self-care Challenging

Total, 2026



Q2.4. How often does each of the following make it challenging to take care of your health?

Self-care barriers are felt more strongly by younger adults and women.

The challenges associated with looking after health and well-being are not felt equally across groups. Women are more likely than men to report stress and worry, tiredness, and cost as barriers to self-care. Younger adults aged 18-24 also report these barriers more often than adults aged 65+, particularly stress, low energy, and the cost of maintaining health and well-being.

WHAT IT MEANS

Most people want to take better care of their health and well-being, but some groups face more obstacles than others in doing so. Younger adults and women are consistently more likely to report stress, tiredness, and cost as barriers, suggesting they may need additional support to turn good intentions into sustained healthy behaviors.

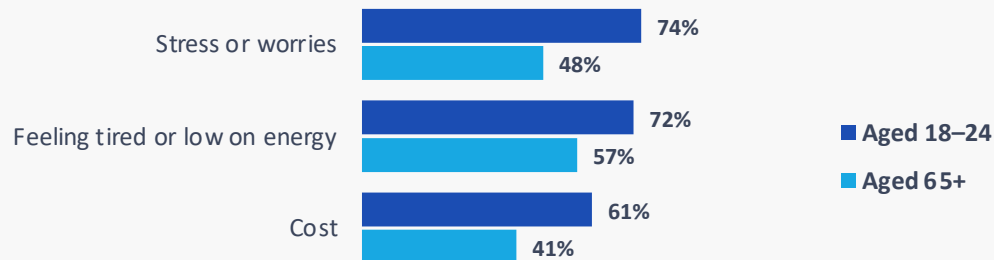
These findings reinforce the importance of addressing practical and emotional barriers alongside health education. Helping people manage stress, improve recovery, and navigate the cost of healthy living may be just as important as encouraging healthier behaviors in the first place.

Barriers to Self-care, by Age and by Gender

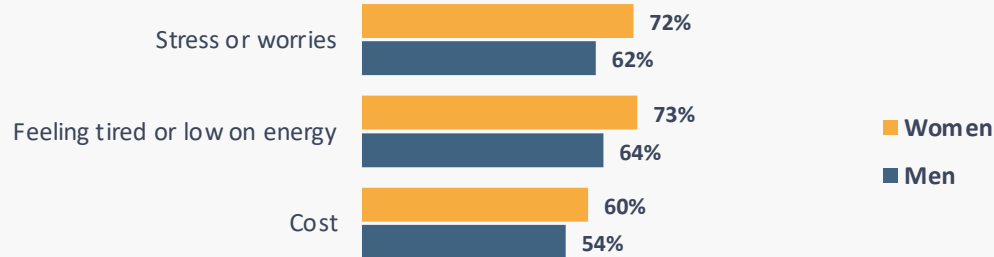
Total, "Often" + "Sometimes," 2026



Age gap



Gender gap



Q2.4. How often does each of the following make it challenging to take care of your health? Analysis by age and by gender.

Cost is a much more frequent barrier to self-care in emerging markets.

The cost of maintaining health and well-being is a challenge in every market, but the extent of that challenge varies considerably. In India (73%), Brazil (69%), South Africa (66%), and Mexico (60%), a majority say cost often or sometimes makes it difficult to take care of their health and well-being. While cost is less frequently cited in OECD markets, it still affects around half of adults in countries such as Canada (49%), the UK (47%), and Germany (46%).

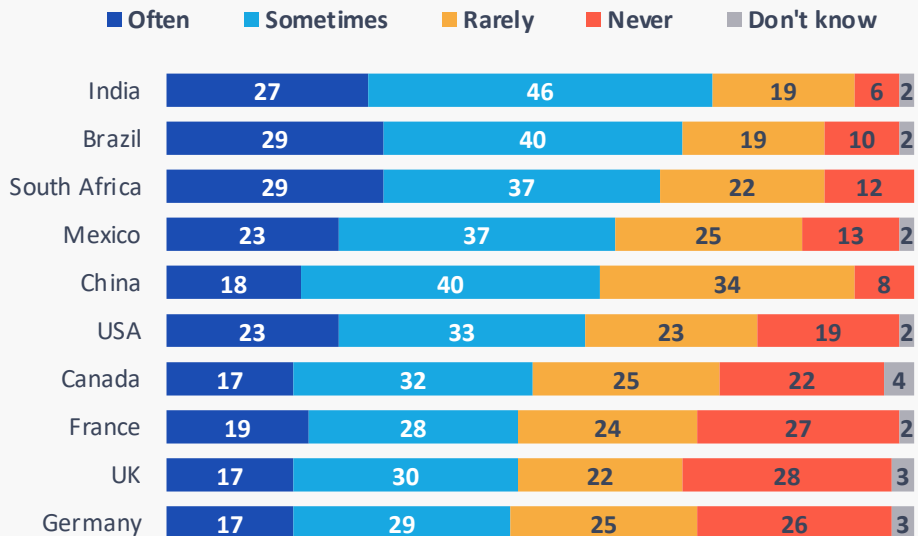
WHAT IT MEANS

Cost is the self-care barrier that shows the clearest divide between markets. While people around the world share many of the same health aspirations, the affordability of health and well-being options appears to be a much greater challenge in emerging markets.

For businesses, healthcare providers, and policymakers, this highlights the importance of considering affordability alongside access. Products, services, and programs that support health and well-being are likely to have the greatest impact when they are both available and affordable for the people who need them most.

How Often Cost Makes Self-care Challenging

Total and by Market, 2026



Q2.4. How often does each of the following make it challenging to take care of your health? –The cost of health and well-being options or services



Finding 3:

"Eating well"
means fresh, not
perfect.

Most people see a strong connection between what they eat and how they feel.

The connection between food and health is nearly universal. Close to nine in ten people connect what they eat and drink to their health and well-being, making it one of the strongest and most consistent findings in the study. This relationship is evident across markets, with a clear majority in every country seeing food as an important contributor to health and well-being.

There is broad agreement across markets that food and drink play an important role in health and well-being. While the strength of that connection varies somewhat between countries, the overall pattern is remarkably consistent.

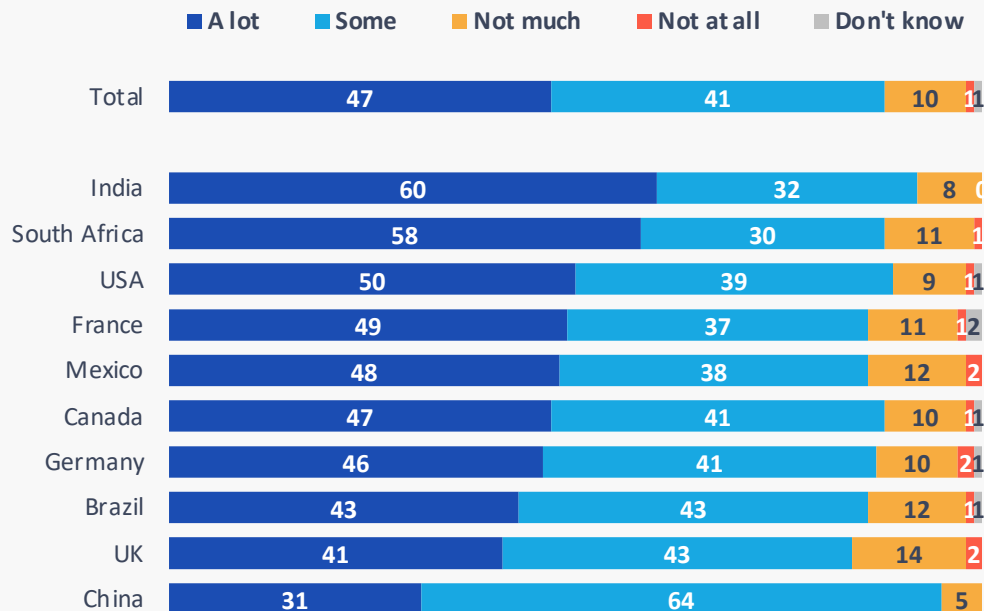
WHAT IT MEANS

People view food choices as health choices. Unlike some health topics where views vary considerably, there is broad consensus that what people eat and drink impacts their health and well-being.

The challenge is therefore less about convincing people that food matters and more about helping people make food choices that support their health and fit their preferences, circumstances, and budgets.

Connection between Food and Health and Well-being

Total and by Market, 2026



Q8.1. People think about food in different ways. When you think about your health and well-being, how much do you connect it to what you eat and drink overall (including both everyday meals and treats)?

Fresh foods and key nutrients are central to how people define “eating well.”

People have a broad and practical view of what it means to eat well. Fresh or minimally processed foods (47%) and getting key nutrients (47%) are the most commonly cited characteristics, followed by eating a balanced mix of foods (43%). Managing health conditions, managing weight, eating within a budget, and enjoying food in moderation are also important parts of the picture for many consumers.

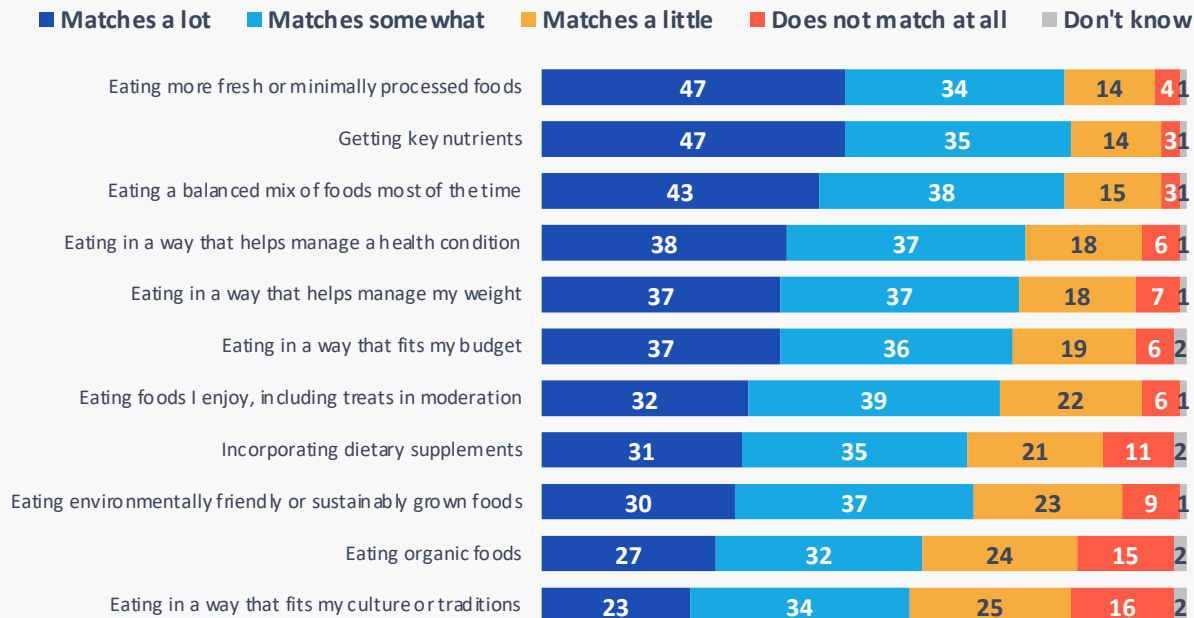
WHAT IT MEANS

Consumers take a holistic view of eating well. It is not defined by a single health goal, but by a combination of food quality, nutrition, balance, affordability, and personal needs.

This suggests that successful health and nutrition strategies should reflect the realities of everyday life, recognizing that people want food that supports their health while also fitting their tastes, budgets, and lifestyles.

What “Eating Well” Means to People

Total, 2026



Q8.2. People have different views on what “eating well” means. How much, if at all, do the following statements match what “eating well” means to you? Please think about what feels realistic for your life (this can include enjoyment and treats).



Finding 4:

**Climate change is
becoming a
personal health
issue**

Climate change is becoming a personal health issue.

Extreme heat and poor air quality are the climate-related health impacts people report experiencing most often. Around three in four people report at least one health or well-being impact linked to climate or environmental change, and many have made changes in response. More than a third have avoided going outside at certain times because of extreme weather, while others report changes to hygiene routines, how they manage heat at home, or the products they use to protect their health.

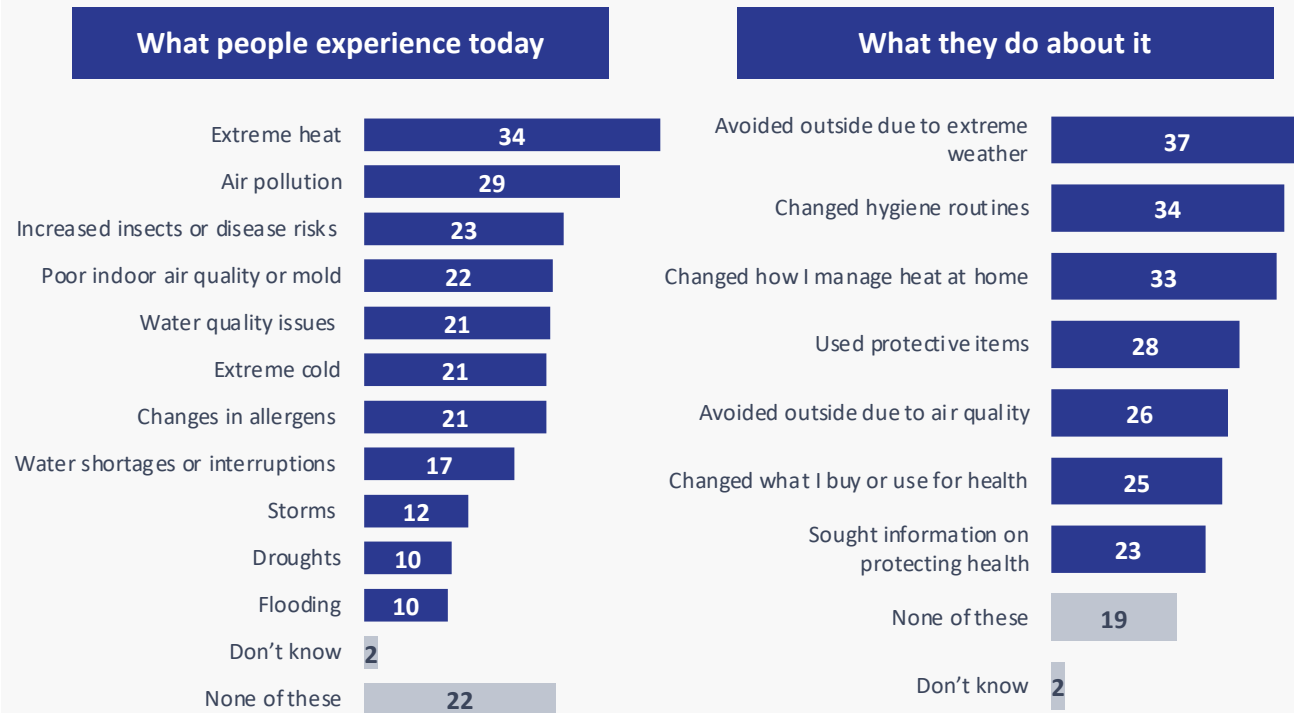
WHAT IT MEANS

The findings suggest that climate and environmental changes are already influencing how people look after their health and well-being. Rather than being viewed only as environmental issues, many people report experiencing direct health impacts and making adjustments in response.

This likely creates interest in information, products, and services that help people manage challenges such as extreme heat, poor air quality, and other environmental impacts on health.

How Current Climate Impacts Translate into Everyday Behavior Change

Total, 2026



Q7.1. In the past 12 months, have any of the following affected your health or well-being, even a little? Q7.2. Have you made any changes because of environmental or climate-related issues affecting your health or well-being?

Climate-related risks to health and well-being vary across different countries.

India and Mexico top the table for different reasons. India reports relatively high levels across a range of climate-related health impacts, while Mexico stands out primarily for extreme heat. South Africa stands apart on water, the only market where water quality problems and water shortages are equally cited. The USA leads the table on just one risk: changes in allergens. At the other end, the UK and Germany are the outliers, with far fewer people reporting impacts.

WHAT IT MEANS

The health effects associated with climate and environmental change are not the same everywhere. Extreme heat, air quality, water challenges, allergens, and other risks vary substantially across markets, suggesting that responses should be tailored to local conditions rather than assumed to be universal.

For businesses, healthcare providers, and policymakers, understanding which climate-related health issues matter most in each market will be important when designing products, services, and public health responses.

Which Climate Impacts Affect Health and Well-being in Each Market

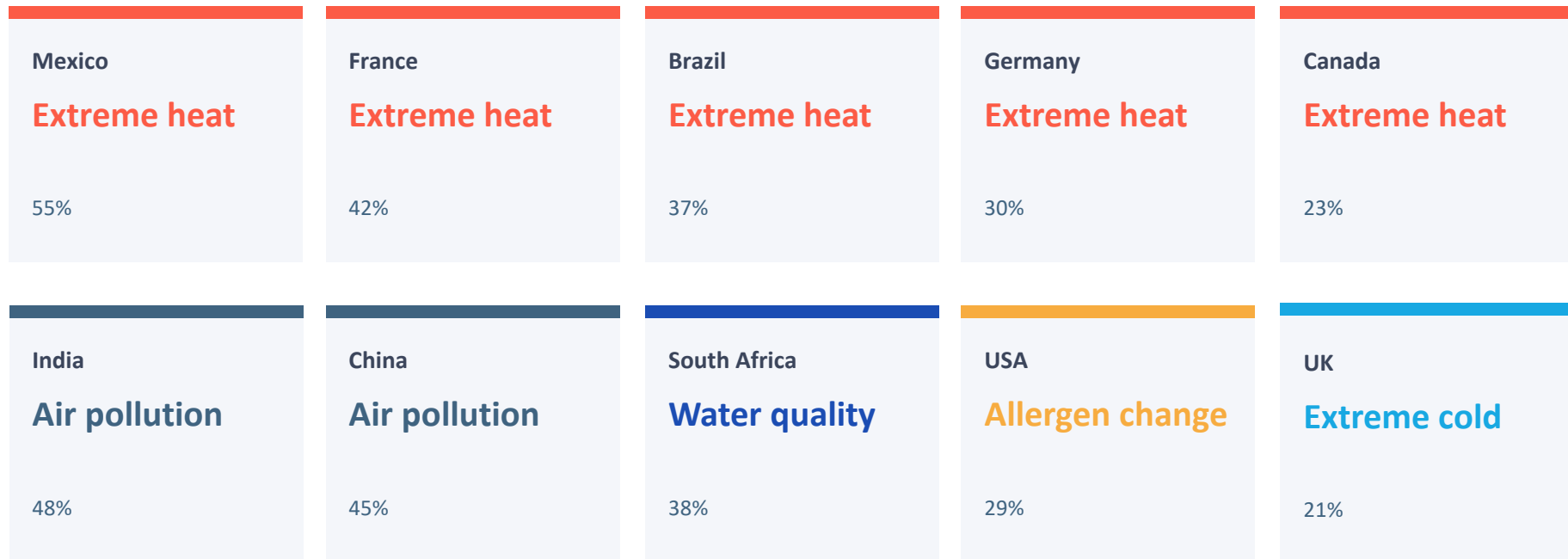
By Market, 2026

	What people experience today									
	Brazil	Canada	China	France	Germany	India	Mexico	S. Africa	USA	UK
Extreme heat	37	23	32	42	30	44	55	36	26	16
Extreme cold	19	21	13	14	14	32	13	38	23	21
Air pollution or poor air quality	35	22	45	19	17	48	37	32	25	14
Changes in allergens	14	23	24	16	20	27	18	22	29	17
Water quality issues	18	10	33	10	11	40	26	38	17	10
Water shortages	15	8	20	6	9	33	23	38	12	7
Increased insects or disease risks	35	15	27	15	13	37	36	26	18	8
None of these	17	33	13	28	35	3	8	11	29	43

Q7.1. In the past 12 months, have any of the following affected your health or well-being, even a little?

And where people live decides which risk comes first

The single most widely reported climate or environmental impact on health and well-being in each market, and the share reporting it



Q7.1. In the past 12 months, have any of the following affected your health or well-being, even a little?

Rising costs are a shared concern, while younger and older generations anticipate different health impacts.

Higher costs for everyday items that support health and well-being are a concern across all generations. Beyond this shared concern, younger adults are more likely to expect greater stress and difficulty maintaining healthy routines because of climate and environmental change, while older adults are more likely to anticipate heat-related health problems and increased pressure on healthcare services.

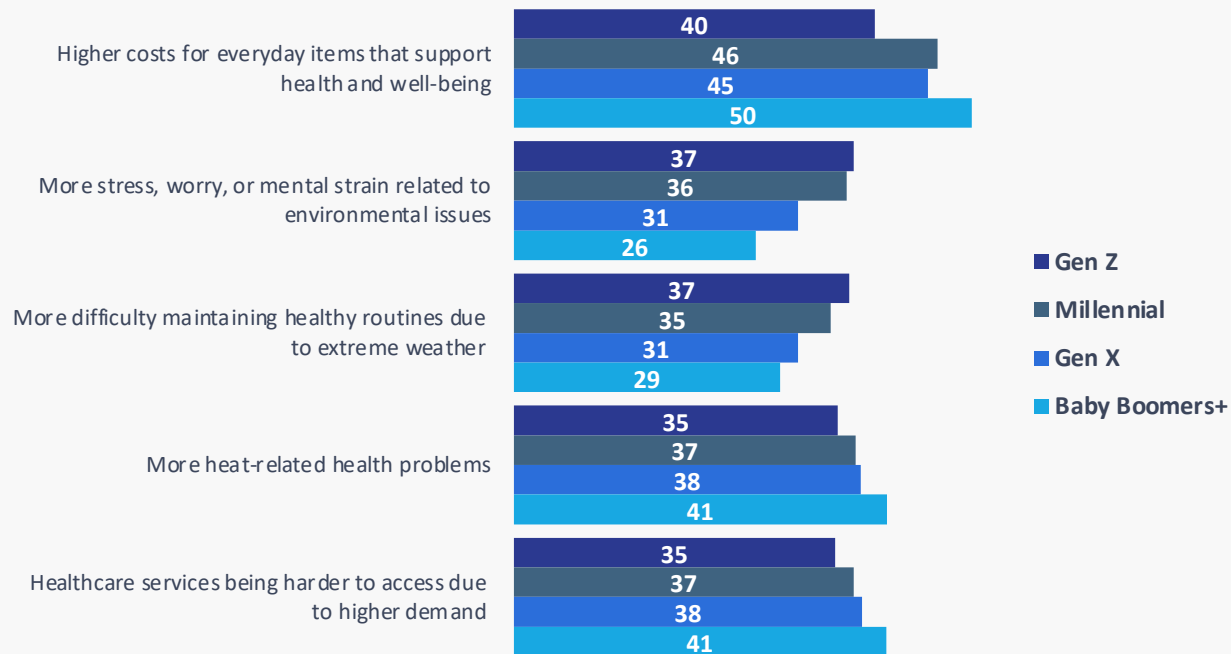
WHAT IT MEANS

The health effects people associate with climate and environmental change extend beyond physical impacts alone. While rising costs are a common concern across generations, younger adults are more likely to emphasize stress and disruption to everyday routines, whereas older adults are more focused on direct health impacts and access to care.

These findings suggest that responses to climate-related health challenges may need to account for both shared concerns and different life-stage experiences, rather than assuming the issue will be felt the same way by everyone.

Impacts Expected to be More Common in the Next Five Years Because of Climate/Environmental Changes

By Generation, 2026



Q7.3. Thinking about the next five years, which of the following impacts, if any, do you expect climate change or environmental changes to make more common in your daily life? Please select all that apply.



Finding 5:

**Healthcare
professionals are
the most trusted
sources of health
information**

Healthcare professionals are the most trusted sources of health information.

Trust in health information follows a clear hierarchy. Doctors or nurses (85%), pharmacists (79%), and other healthcare professionals (78%) are the most trusted sources. Global health organizations (66%) and government or public health authorities (58%) form a second tier of trusted institutional sources.

People respondents know personally (57%) occupy a distinct position, trusted at similar levels to government and non-profits, and more than online influencers/creators (32%) or news media (44%).

Trust in business varies depending on proximity to health. Health and personal care brands (60%) and over-the-counter medicine companies (59%) are trusted more than food and beverage companies (44%) and supermarkets (43%).

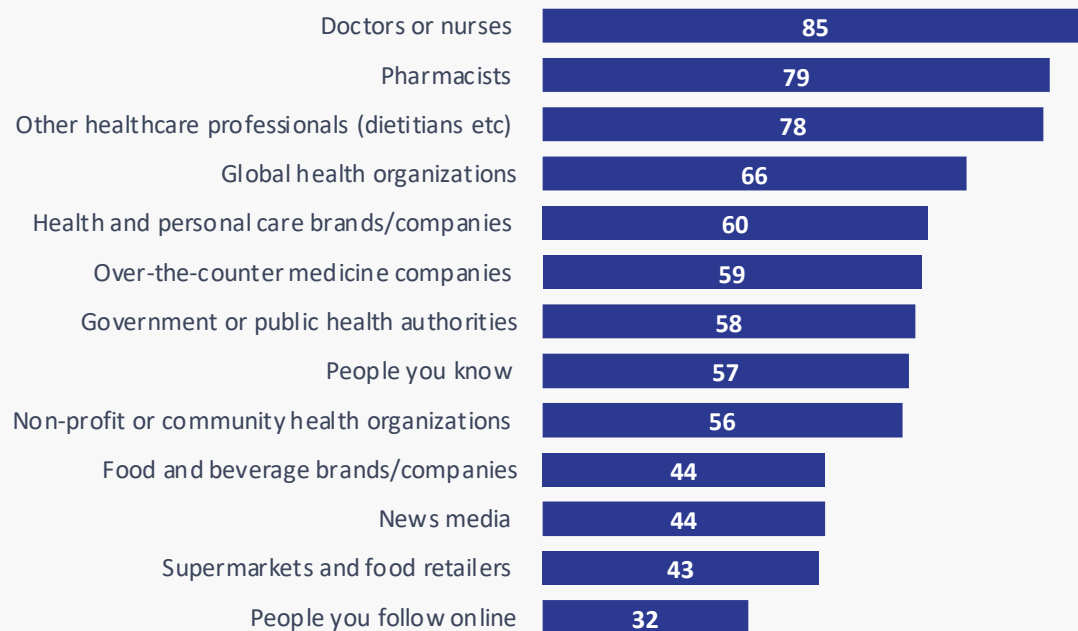
WHAT IT MEANS

Credibility matters in health communication. Healthcare professionals and health-focused institutions are trusted more than commercial or promotional sources, suggesting that who delivers information can be as important as the information itself.

For less-trusted sources, being able to partner or collaborate with more trusted sources will be critical.

Trust in Health Information by Source

Total, "A Great Deal" + A Fair Amount," 2026



Q3.1. How much do you trust each of the following sources for health information?

People turn first to healthcare professionals, but personal networks also play an important role.

Healthcare professionals are the sources people use most often when seeking health information. Doctors or nurses (62%), pharmacists (46%), and other healthcare professionals (35%) are the most frequently consulted sources.

People respondents know personally (27%) are also commonly used, ahead of government authorities (23%) and global health organizations (22%), despite being trusted at similar levels.

Use of companies varies depending on their connection to health. Health and personal care brands (23%) and over-the-counter medicine companies (20%) are used more frequently than food and beverage companies (13%) and supermarkets (12%). Online influencers/creators are among the least-used sources (12%).

WHAT IT MEANS

The sources people use most often broadly reflect the sources they trust most. Healthcare professionals occupy a central role, while personal networks remain an important source of information alongside more formal institutions.

The findings suggest that people draw on a combination of professional expertise, institutional sources, and personal relationships when seeking health information, rather than relying on a single source alone.

Most-used Sources for Health Info

Total, 2026



Q3.1a. When you want to find out information about health and well-being topics or issues, which, if any of the following, do you use most of the time?

Digital health tools are viewed more positively in some markets than others.

Most people view digital health tools as helpful, but the strength of that sentiment varies across markets. India (48%), South Africa (44%), Mexico (39%), and Brazil (35%) are most likely to describe digital tools as very helpful. In contrast, respondents in Germany (14%), Canada (14%), France (15%), and the UK (17%) are less likely to express the same level of enthusiasm, although many still describe these tools as somewhat helpful.

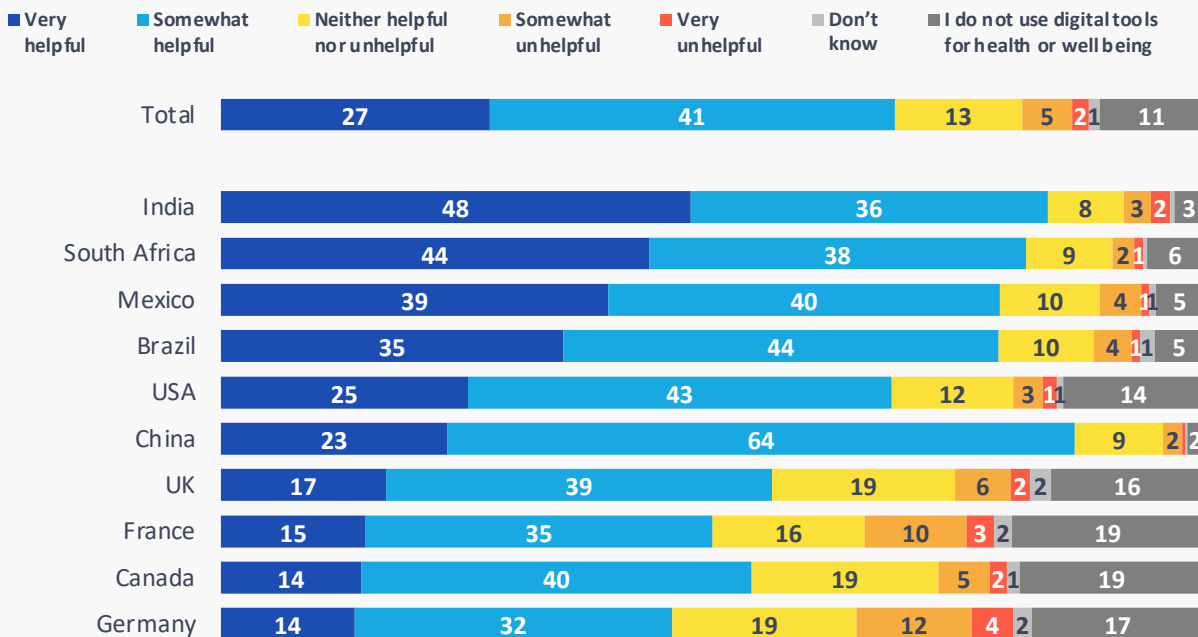
WHAT IT MEANS

Digital health tools are viewed positively across many markets, but enthusiasm is not uniform. The findings suggest that attitudes toward digital health tools are shaped by local context, with some markets reporting substantially higher levels of perceived usefulness than others.

For organizations investing in digital health solutions, the results highlight the importance of understanding local needs, expectations, and attitudes rather than assuming a one-size-fits-all approach.

Helpfulness of Digital Tools

Total and by Market, 2026



Q2.9. How helpful do you find each of the following digital health tools?

Younger generations are more likely to trust online sources and find digital health tools helpful.

Generational differences are particularly pronounced when it comes to digital and online health resources. Gen Z are three times more likely than Baby Boomers to trust people they follow online for health information (42% vs 14%). They are also considerably more likely to find digital health tools helpful (79% vs 46%).

While digital tools are viewed positively across generations, younger adults are substantially more receptive to both digital health support and online sources of health information.

WHAT IT MEANS

The findings suggest that attitudes toward health information and support are shaped in part by generation. Younger adults are more open to online sources and digital health tools, while older adults are less likely to trust or rely on these resources.

This highlights the importance of recognizing that people seek and engage with health information in different ways. Approaches that resonate with younger audiences may not necessarily resonate to the same extent with older generations.

Generational Divide in Health Information

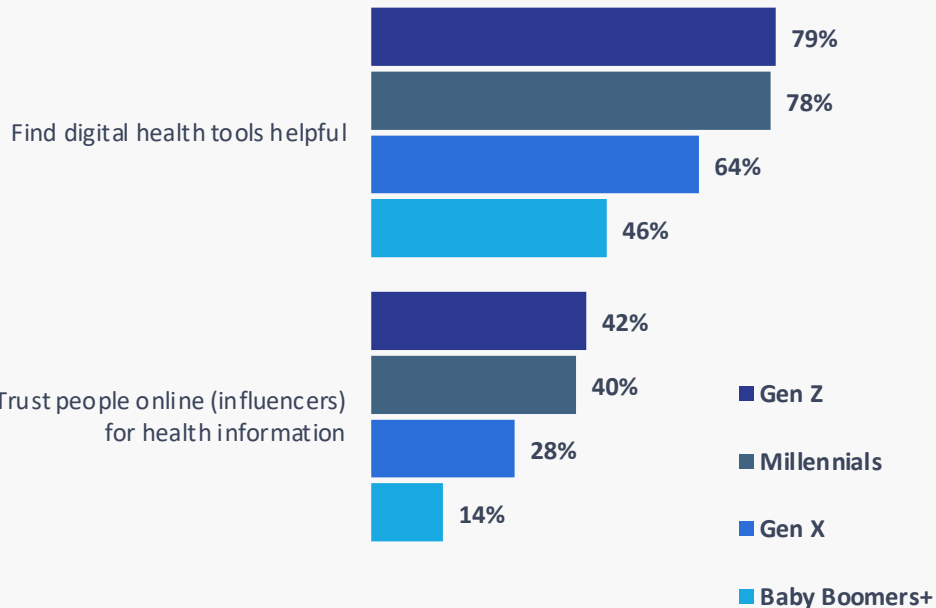
By Generation, 2026



Helpfulness of digital tools
("Very" + "Somewhat helpful")



Trust in people you follow online
("A great deal" + "A fair amount")



Q3.1. If you see, read, or hear health and well-being information from each of the following, how much, if at all, do you trust it?
Q2.9. Overall, how helpful or unhelpful do you find digital tools (such as apps, online services, or connected devices like smart watches) for supporting your everyday health and well-being?



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