

GLOBAL PUBLIC CONFIDENCE STUDY 2025

Health Care Confidence Report



IRIS NETWORK
GLOBAL PUBLIC CONFIDENCE
STUDY REPORT 2025



Introduction

- ▶ The 2025 IRIS Global Confidence Study provides a multi-country view of public sentiment on the most important issues of the day: economic confidence, health attitudes, climate concerns, and artificial intelligence.
- ▶ This report presents the health care results – exploring system confidence, personal health status, weight perception, and health behaviors across 20 countries and nearly 15,000 respondents. Separate reports address the other three themes.

Methodology

	2023	2024	2025
Sample	17 777 resp.	14 096 resp.	14 742 resp.
Countries	26	21	20
Fieldwork	Q1 2023	Q2 2024	Q4 2025
Method	Mixed (online, F2F, CATI)		
Sample per country	500–1,000 adults		

Participating Countries

Western Europe

Austria, Finland, Germany, Ireland, Italy, Spain, Switzerland

Central & Eastern Europe

Bulgaria, Greece, Poland, Romania, Türkiye

Asia-Pacific

Australia, Indonesia, Japan, Malaysia, South Korea

Americas

Canada, Dominican Republic, USA

Note: Country coverage changed between waves – Bulgaria, Canada, Dominican Republic, Germany, and Ireland are new to 2025, replacing France, Kenya, Mexico, Nigeria, and Panama from 2024. The Netherlands, Lithuania, India, Brazil, Colombia, and the UK participated in 2023 but not in the following waves.

Participating Countries



To learn more about IRIS and its member companies: <https://www.irisnetwork.org/network>

CONTENTS

- 1. Executive Summary**
- 2. Health Care System Confidence**
- 3. Personal Health**
- 4. Weight Perception & Impact**

1. EXECUTIVE SUMMARY

Key Findings at a Glance

**System confidence
remains stable**

44%

Rate their HC system as good
or excellent
(vs 42% in 2023, 41% in 2024)

**Governance, not
resources**

63%

see inefficient management – not
lack of funding – as the root
cause of health care problems

**Self-rated health Good
or better**

71%

Yet only 36% report no
health conditions

**Weight is a
widespread reality**

46%

Consider themselves overweight,
with 14% significantly so

**Both ends of the weight
spectrum are affected**

Underweight people face
comparable daily challenges – a
group often absent from health
interventions.

Conditions compound

88%→37%

Good+ drops with each
additional health condition

What It Means for Business

Self-assessed "well" is not the same as healthy

64% manage at least one condition despite feeling well. Health products and services targeting self-reported needs alone may miss a significant share of the population that has adapted to living with ongoing conditions.

Weight perception is culturally defined

What people consider "suitable weight" varies widely across countries. Screening thresholds, communication strategies, and product positioning that work in one market may not translate to another without local calibration.

Weight management is a two-sided conversation

Both overweight (46%) and underweight (12%) report daily challenges, yet most programmes focus exclusively on overweight. The underweight segment represents an underserved space for health and nutrition providers.

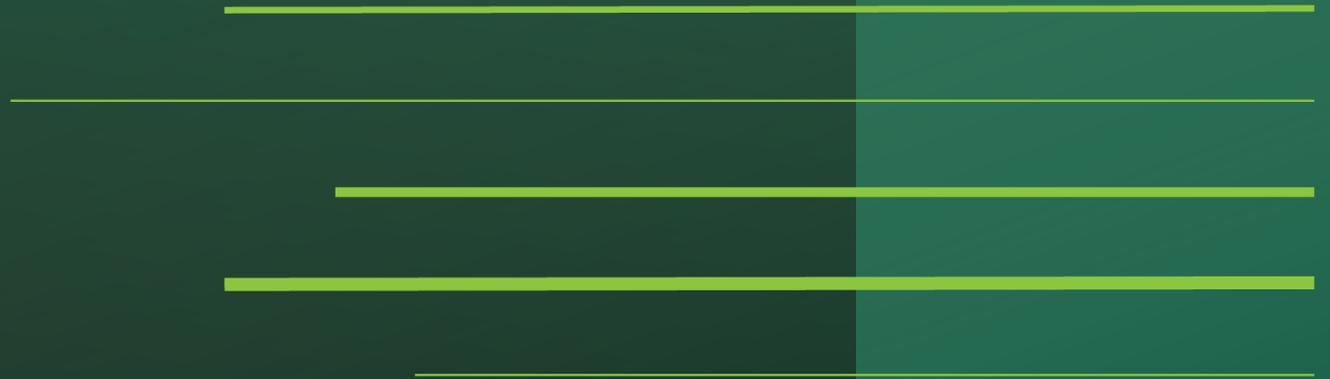
Health conditions compound – and so should solutions

When overweight, chronic illness and mental health coexist, wellbeing drops to 27% Good+. Programmes that address weight, physical and mental health together are better positioned to serve these populations than those tackling each issue in isolation.

System confidence shapes personal well-being

Countries with higher trust in their health care system also report better self-rated health. For health care providers and insurers, the environment in which they operate affects not just policy but how populations perceive and manage their own health.

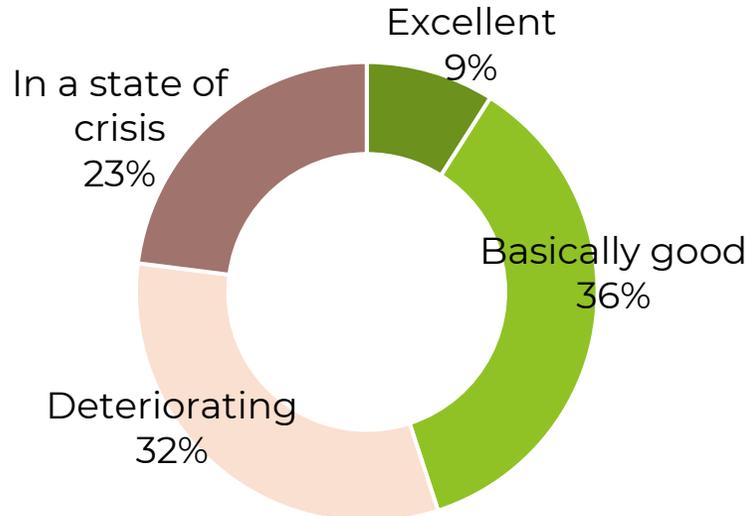
2. HEALTH CARE SYSTEM CONFIDENCE



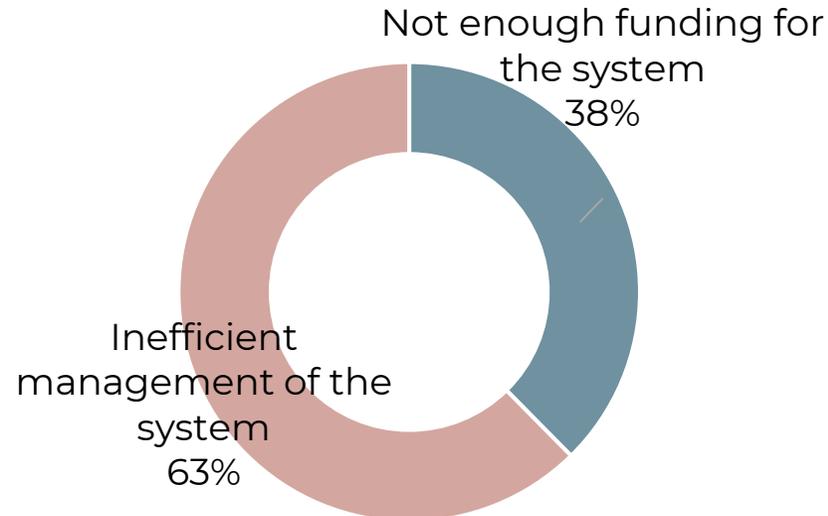
Health Care System Assessment

Prevailing attitudes across the 20 markets surveyed suggest health care systems are seen as underperforming (55%), with governments held accountable. 63% disapprove of how health care is managed, closely mirroring the share blaming inefficient management over lack of funding. The picture that emerges is one of a governance gap rather than a resource gap: the public's message is not "spend more" but "spend better."

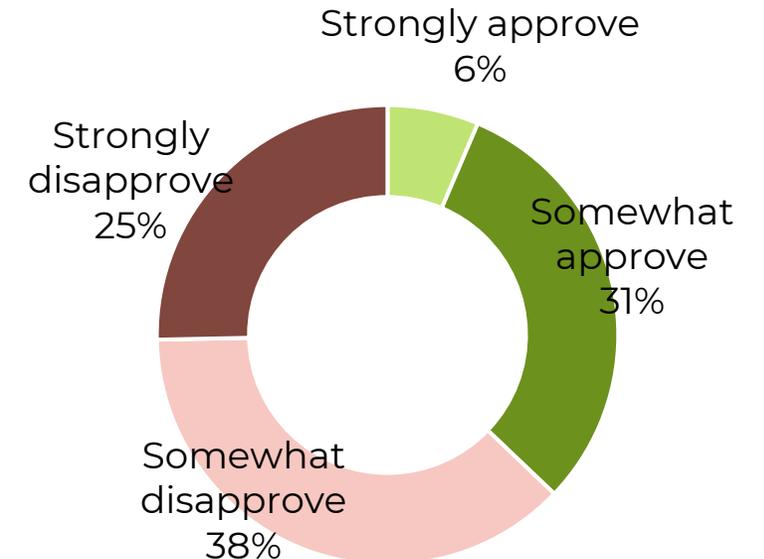
Health Care System Assessment



Cause of Problems



Approval of the government's handling of health care



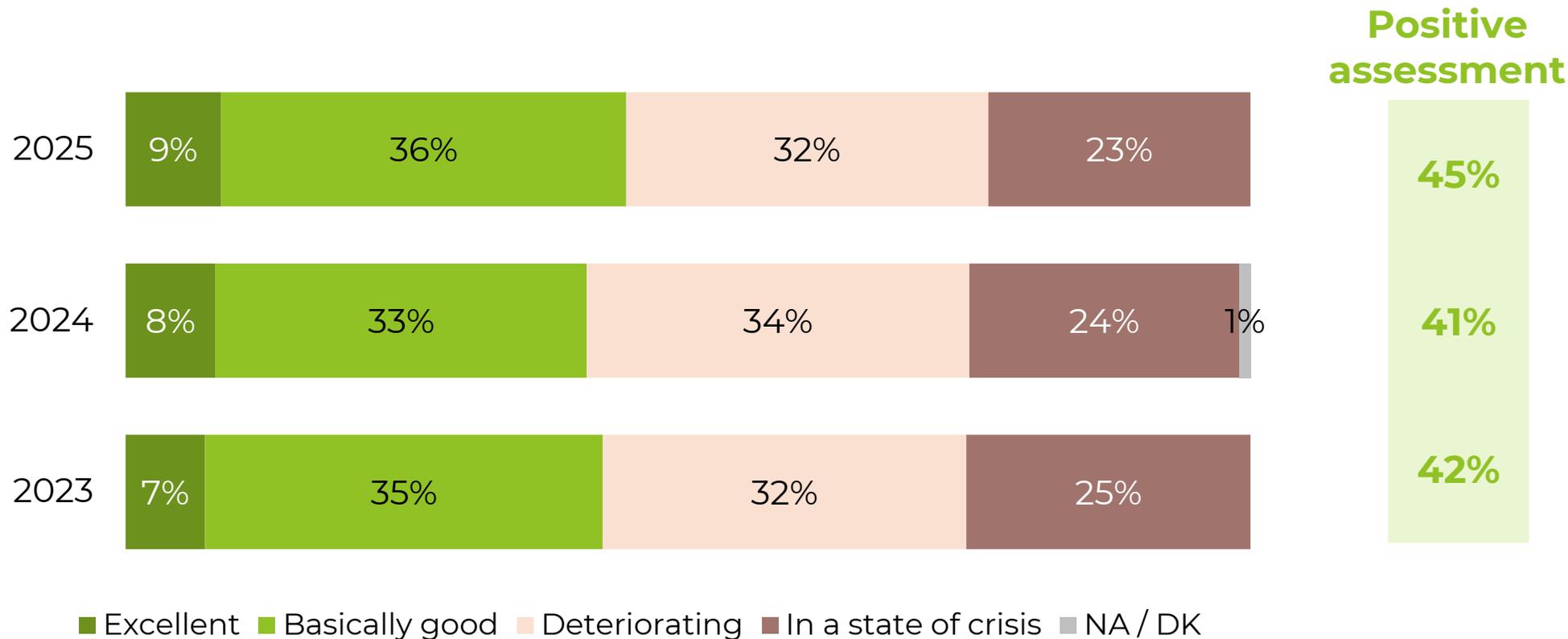
Q. Which ONE of the following is closer to your point of view regarding the healthcare system in your country?

Q. Which ONE is MORE responsible for the problems in the health care system in your country – funding or management?

Q. Do you approve or disapprove of the way [country`s] national government is handling the issue of health care?

Health Care Confidence: Stability

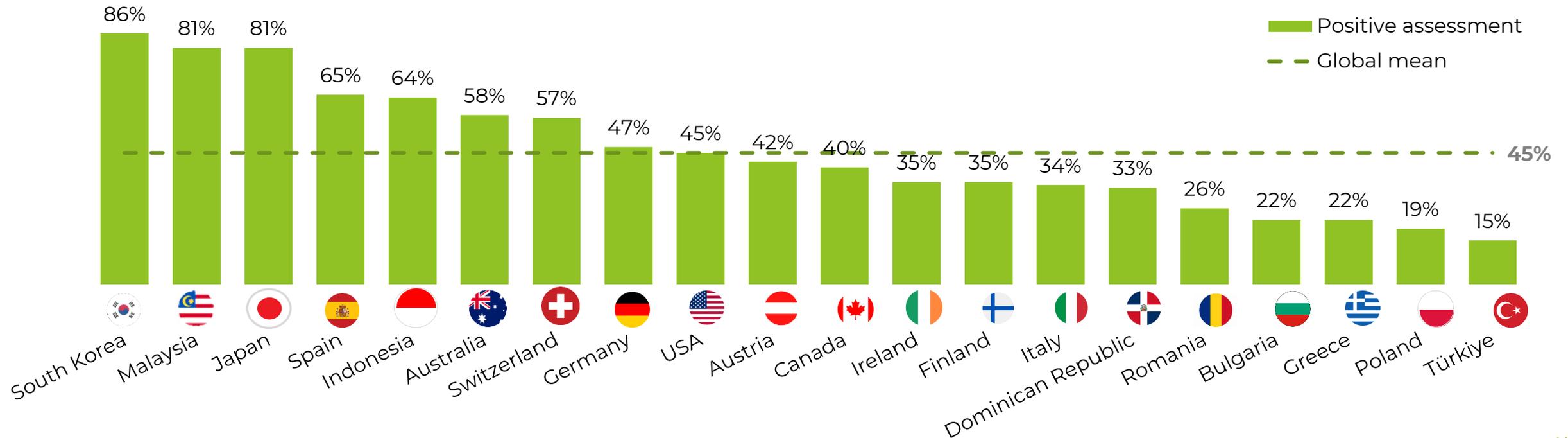
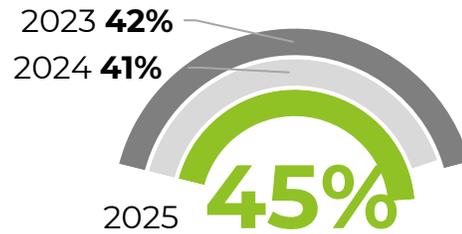
Public confidence in health care systems remains stable across three waves. The modest uptick in 2025 partly reflects changes in country composition between waves. Despite post-pandemic pressures, inflation, and workforce shortages, public perception has barely moved in three years. This suggests deeply entrenched views that are unlikely to shift without systemic reform.



Q. Which ONE of the following is closer to your point of view regarding the healthcare system in your country?

Health Care Confidence by Country

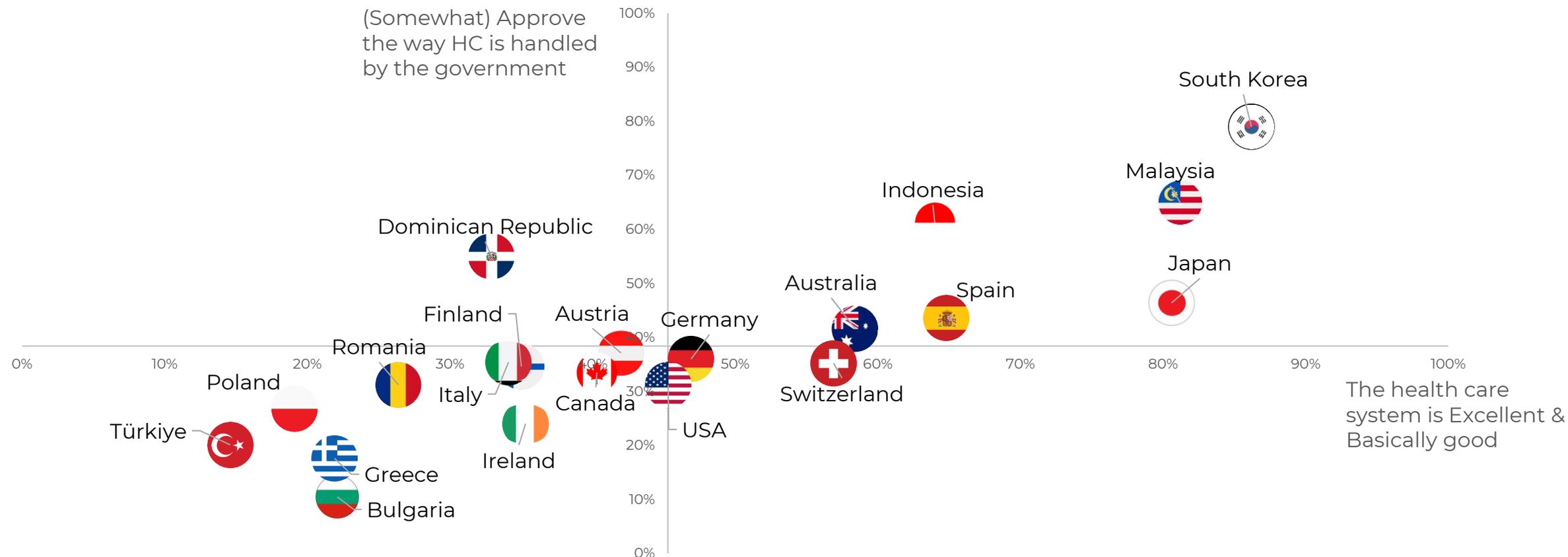
Confidence levels follow a clear regional pattern, with Asia-Pacific markets consistently leading, reflecting well-established universal health care systems. At the other end, Central and Eastern Europe remains the most critical region, where structural challenges continue to hold scores low. Western Europe and the Americas fall in between, though with notable variation within each group.



Q. Which ONE is closer to your point of view about the health care system in your country? – Excellent + basically good

System Confidence & Government Approval

In most markets, system confidence and approval of the government's handling of health care move together – countries that rate their system well also tend to credit their government, and vice versa. Japan stands apart with uniquely high system confidence (81%) but moderate government approval (46%), a gap that may partly reflect the timing of fieldwork shortly after a change in national leadership.

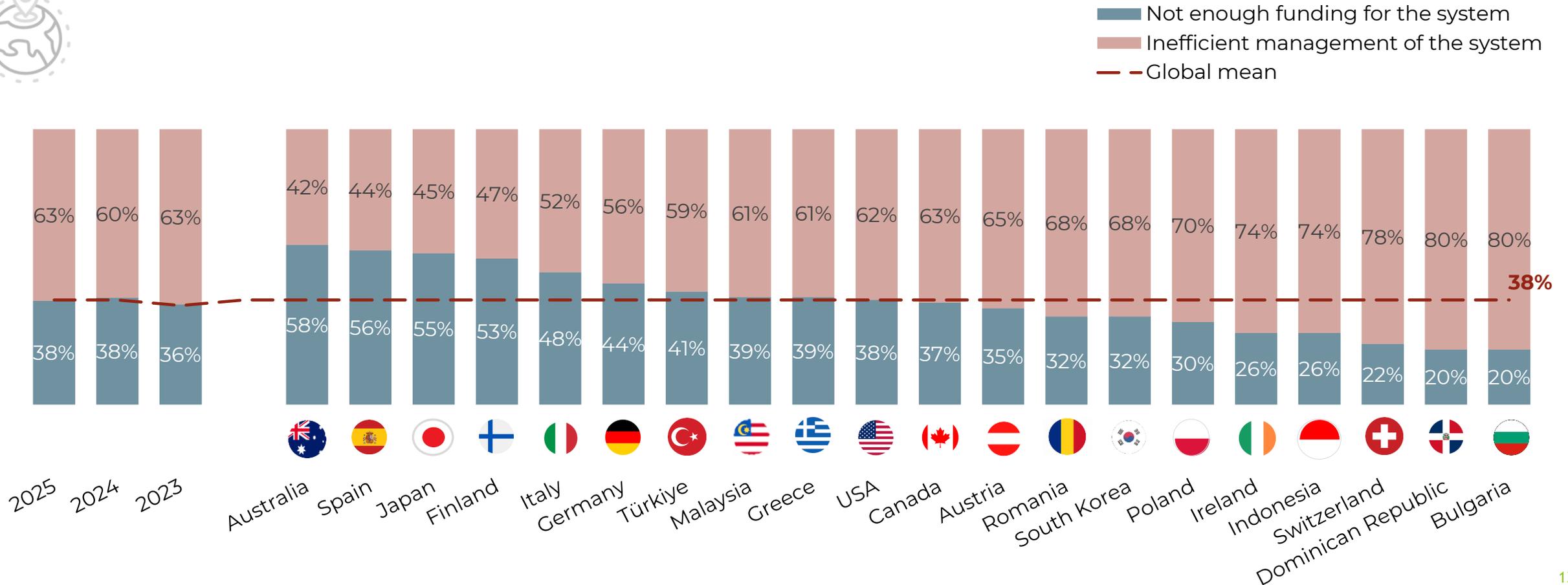


Q. Which ONE of the following is closer to your point of view regarding the healthcare system in your country?

Q. Do you approve or disapprove of the way [country`s] national government is handling the issue of health care?

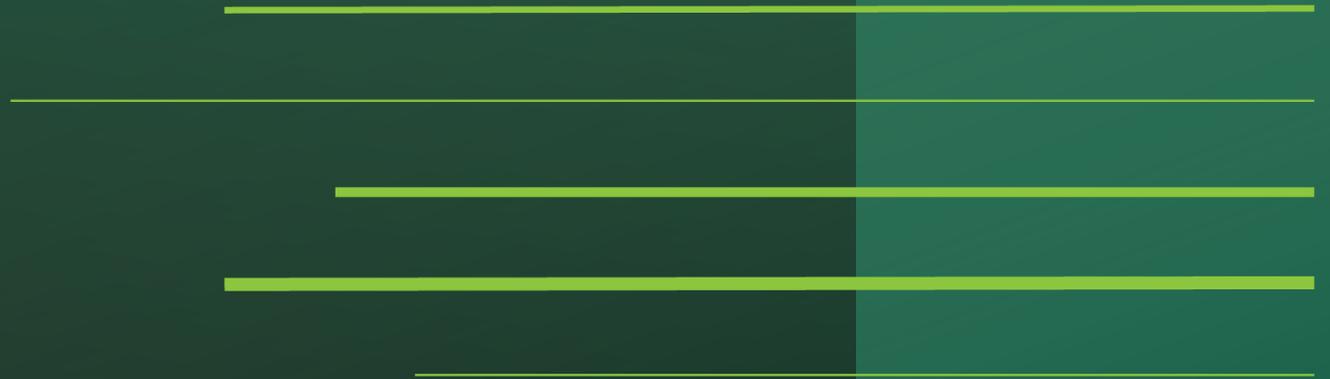
Root Causes: Funding or Management

Globally, the split has held steady at approximately 60:40 across all three waves; a consistent majority identifies inefficient management as the root cause. A small group of countries stands apart: in Australia, Spain, Japan, and Finland, funding is seen as the primary issue. In the majority of markets, the emphasis falls firmly on management, with no clear regional pattern – this divide appears to reflect country-specific perceptions rather than broader trends.



Q. Which ONE is MORE responsible for the problems in the health care system in your country – funding or management?

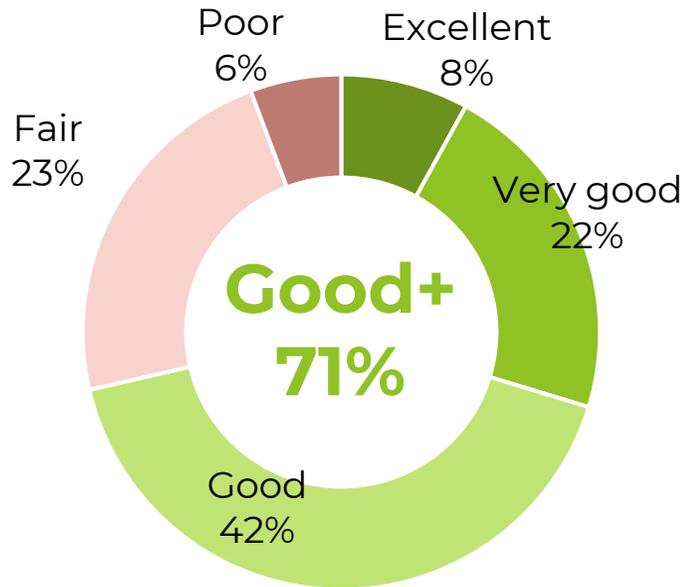
3. PERSONAL HEALTH



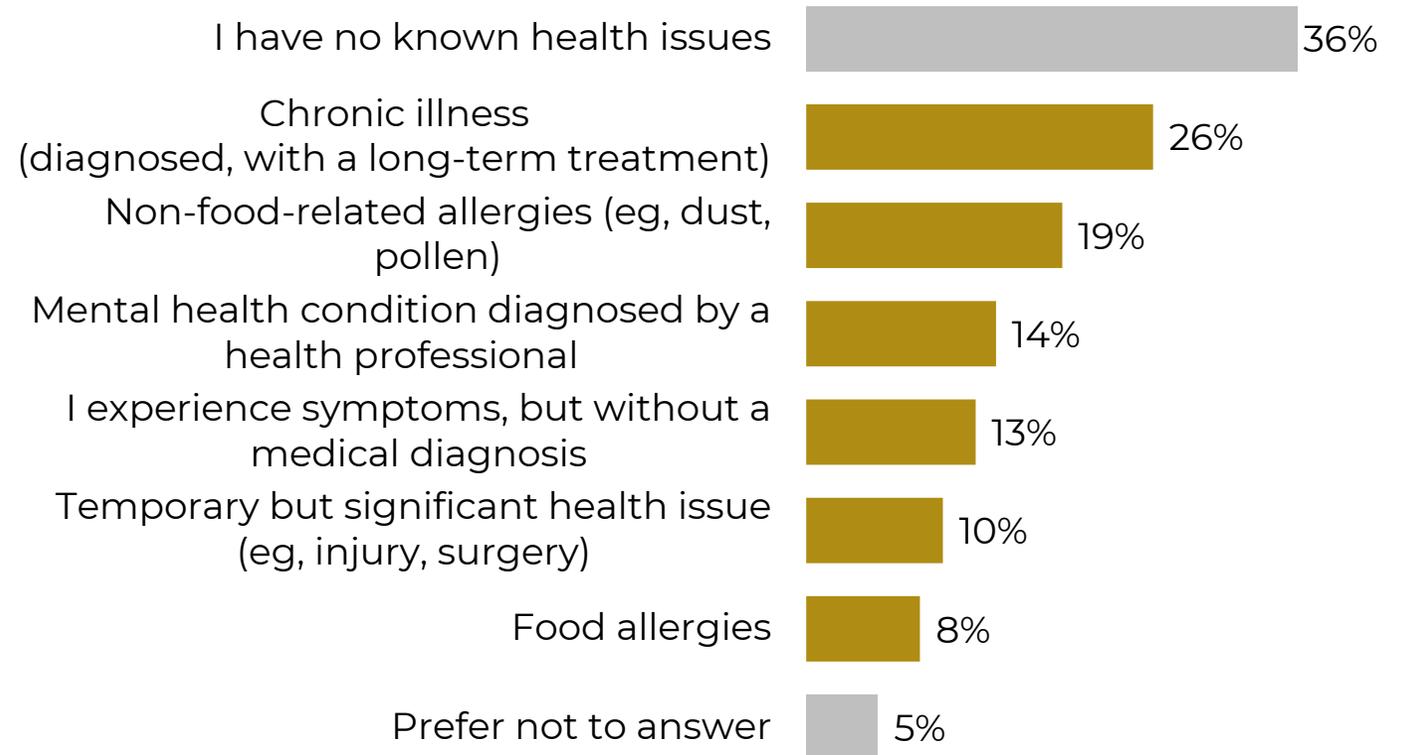
Self-Rated Health

Most people rate their health positively (71% Good or better), yet only 36% report no known health conditions. Part of the gap reflects conditions with limited everyday impact, such as allergies. But chronic illness (26%) and mental health conditions (14%) weigh considerably more. For health care providers, the distinction matters: a broadly "well" population is not the same as a healthy one.

Personal health self-assessment



Health status



Q. How would you rate your overall health status?

Q. What health situations apply to you?

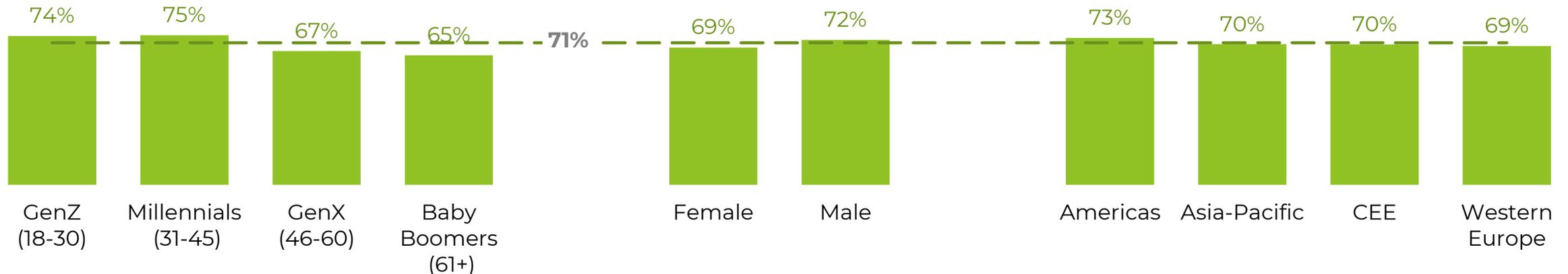
Self-Rated Health by Demographics

The 71% global average holds relatively steady across genders and regions, with no substantial differences. The one meaningful divide is generational: a 10pp gap separates younger cohorts (GenZ and Millennials, ~75%) from older ones (GenX and Boomers, ~65%), largely reflecting the natural accumulation of chronic health conditions after mid-life.

Good+ Score: share of respondents rating their health as **Good + Very good + Excellent** – the primary wellbeing measure used throughout this report.



■ Self-Rated Health - Good+
- - - Global mean



Q. How would you rate your overall health status?

Self-Rated Health by Country

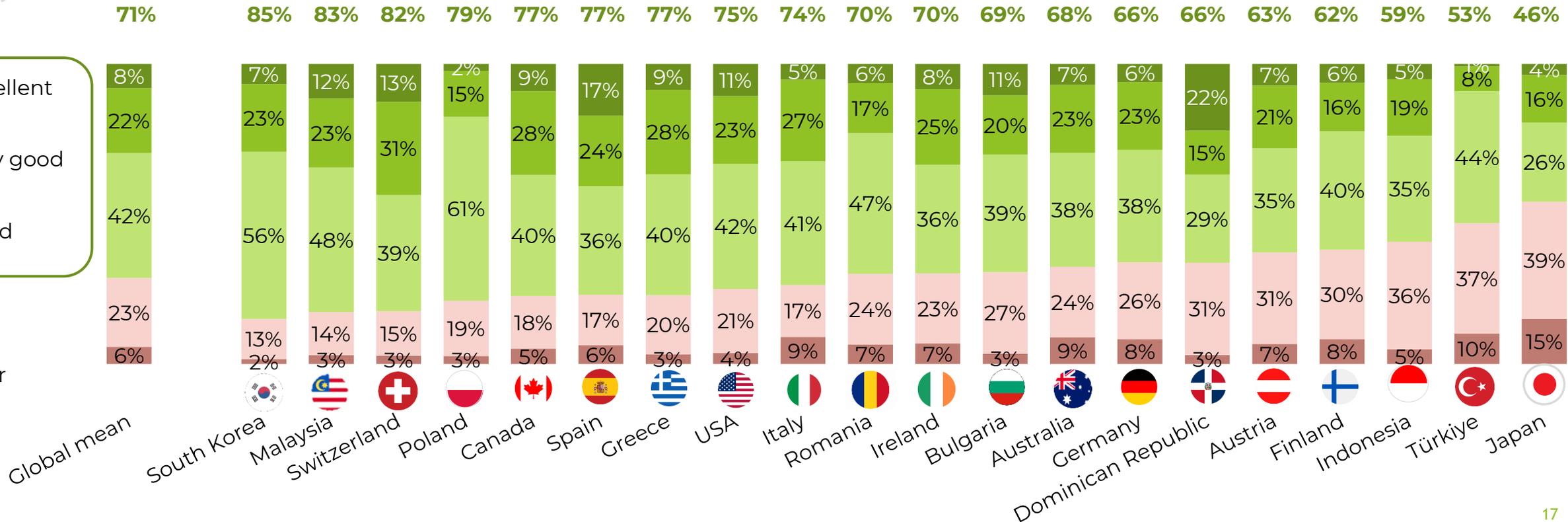
Country-level self-rated health ranges from 85% Good+ in South Korea to 46% in Japan – yet this spread does not reflect the actual health burden. Countries with the lowest self-assessment often report among the highest shares of respondents with no health issues. The pattern reflects cultural attitudes toward self-evaluation more than underlying health status – an important consideration when comparing health data across markets.



Good+ Score



Good+ Scores



Q. How would you rate your overall health status?

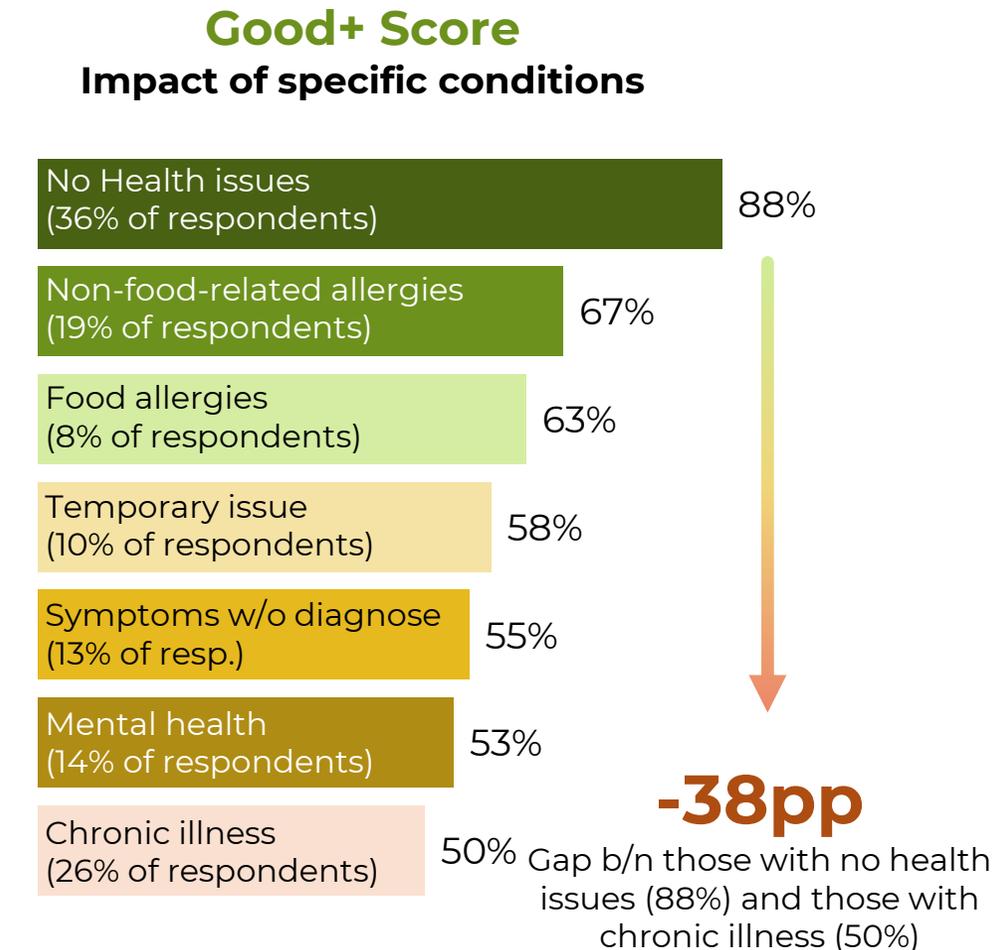
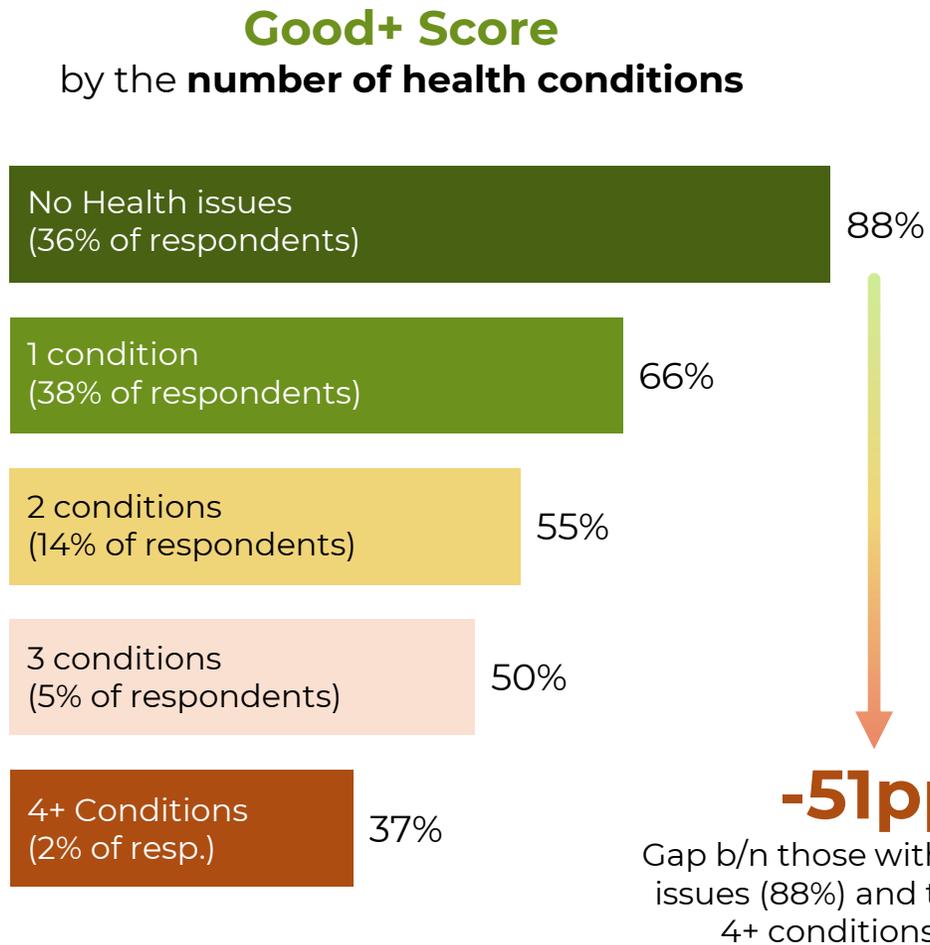
Health Conditions & Self-Rated Health: The Cumulative Effect

Each additional health condition progressively lowers self-rated health – from 88% Good+ among those with no issues to 37% among those managing four or more. Not all conditions carry equal weight: chronic illness and mental health have the strongest individual impact, while allergies affect self-assessment only marginally.

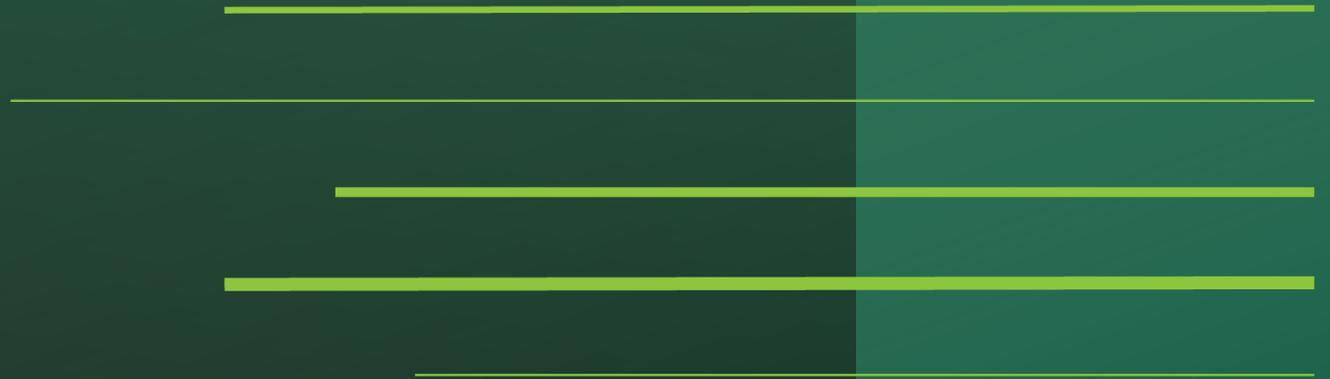
How to read:

36% of respondents report **no health issues**.

Among them, **88%** rate their health as **Good+** (Good, Very good, or Excellent).



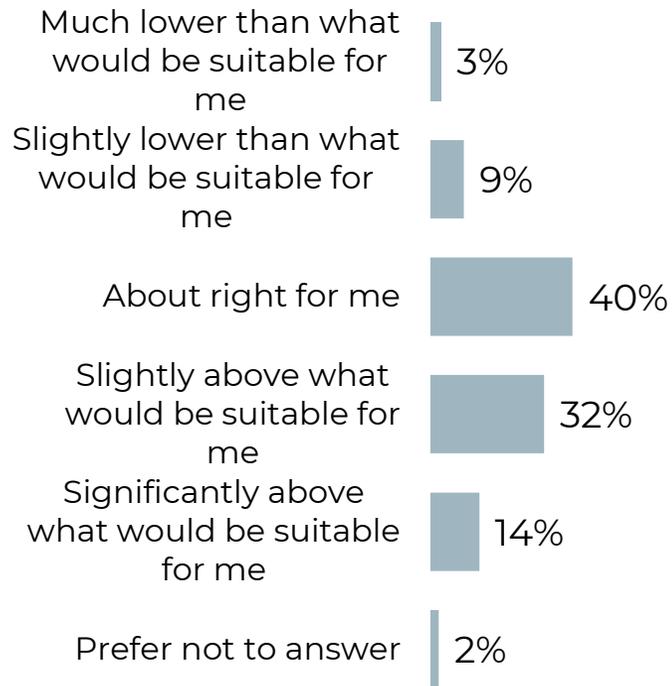
4. WEIGHT PERCEPTION & IMPACT



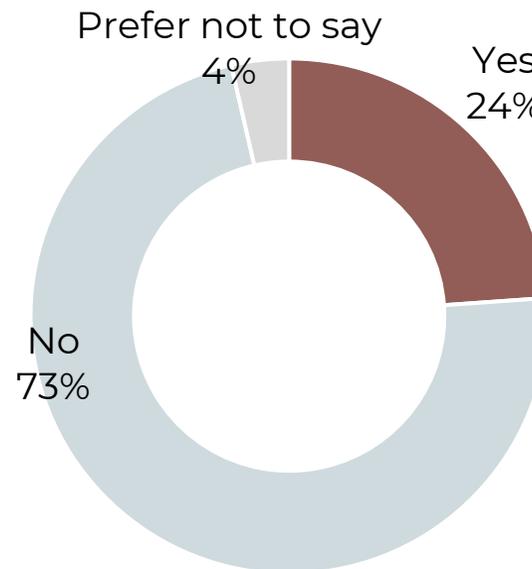
Weight & Health: Beyond the Overweight Focus

Weight management is commonly framed around overweight, and the data confirms its scale: 46% self-assess their weight as above suitable. Yet 12% perceive theirs as below, a group often absent from health policy despite reporting comparable daily challenges. When it comes to action, most people across all weight groups are making an effort – healthier eating (52%) and physical activity (43%) are the most common steps taken.

Weight self-perception

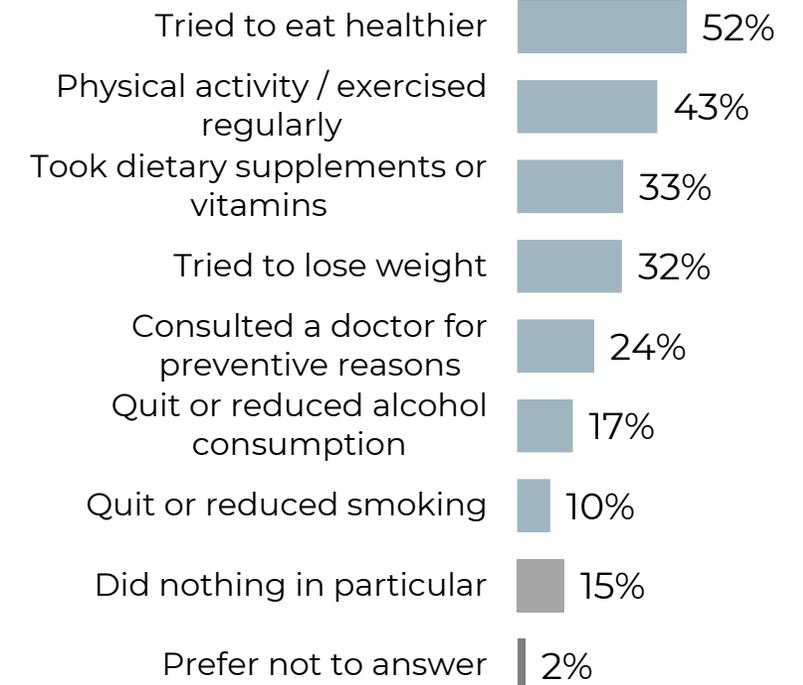


Weight-Related Challenges



Health Actions Taken

On average: 2 actions



Q. How do you feel your current weight fits with your height?

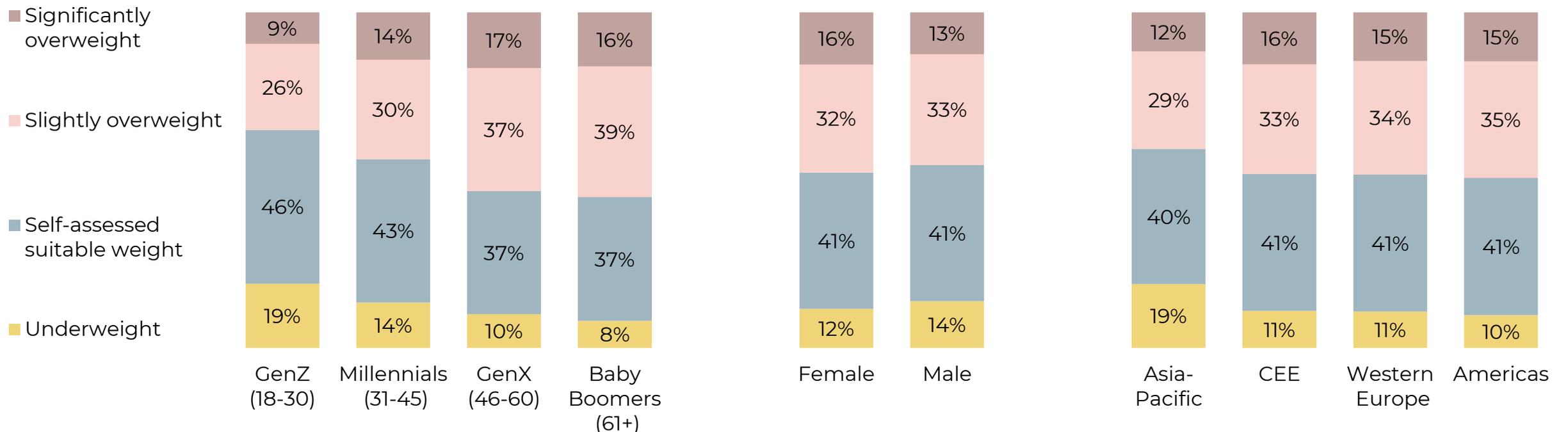
Q. In the past 12 months, have you experienced any challenges in your daily life that you associate with your weight?

Q. In the past 12 months, have you personally done any of the following to improve your health or prevent illness?

Weight Self-Perception by Demographics



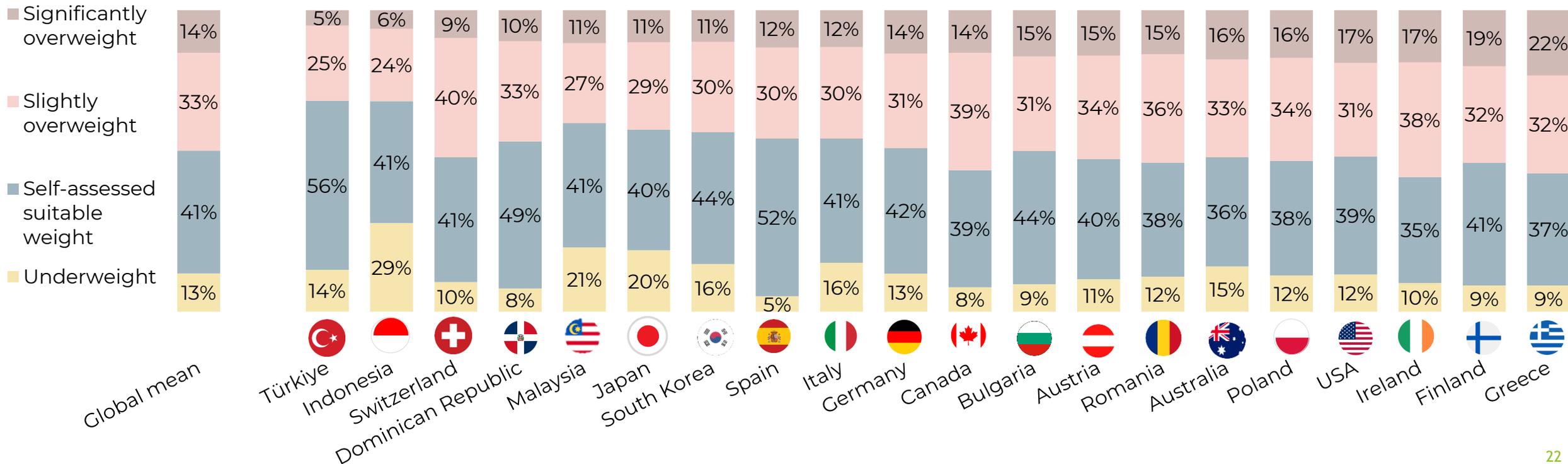
Perceived overweight increases steadily with age – from 35% among GenZ to 55% among Baby Boomers – a pattern consistent with prevailing weight trends across life stages. Gender and regional differences are modest, with all groups falling within a narrow range. Asia-Pacific stands out only in having the highest share of self-perceived underweight (19%), consistent with different cultural body norms.



Q. How do you feel your current weight fits with your height?

Weight Self-Perception by Country

Country-level differences are substantial – self-perceived overweight ranges from 30% in Türkiye to 54% in Greece and Finland, while underweight is concentrated in Asia-Pacific (Indonesia, Malaysia, Japan). This variation reflects differing cultural body norms and self-assessment standards. Understanding how each population defines "suitable weight" is essential for designing meaningful measures for improving health.



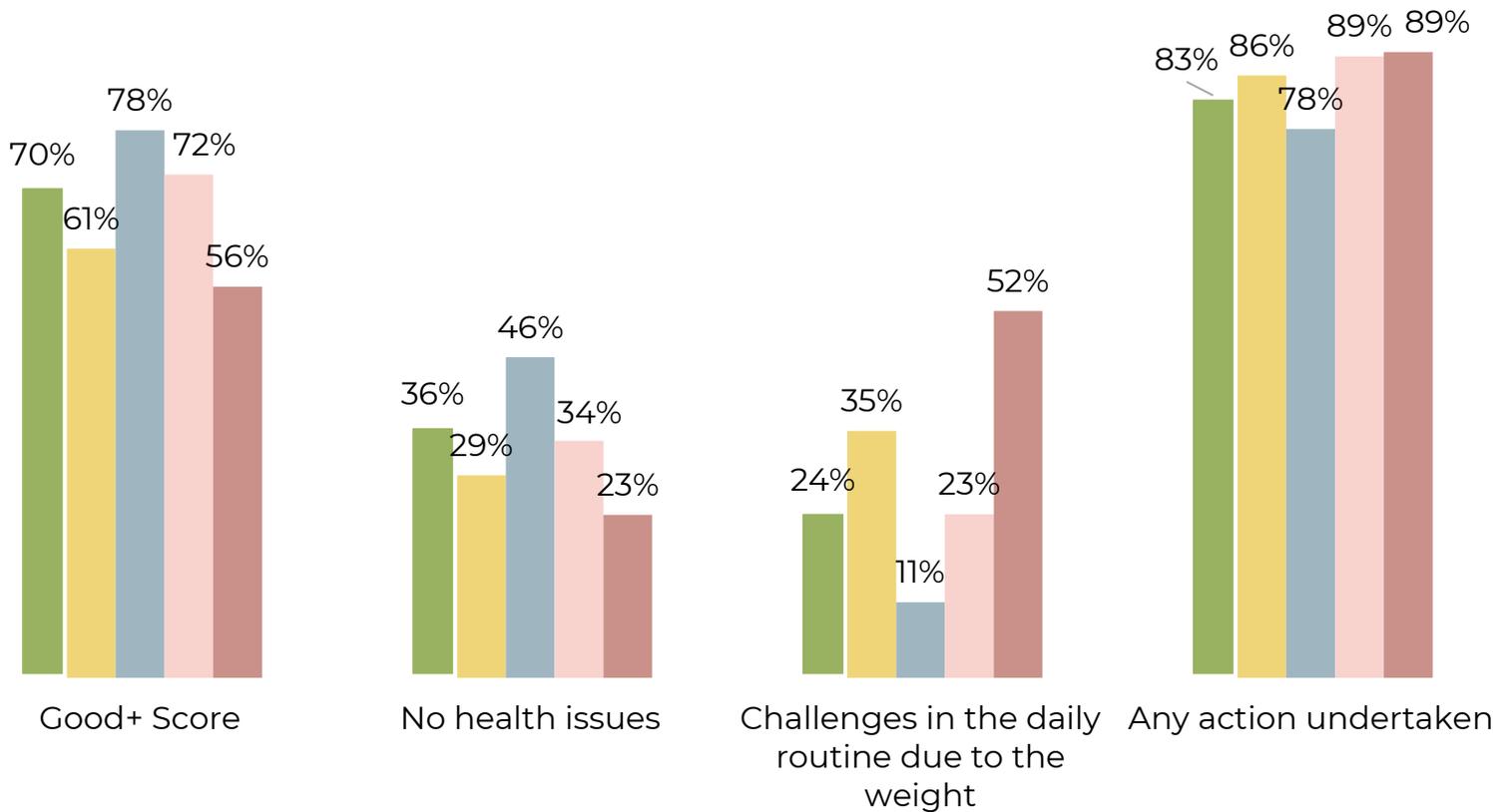
Q. How do you feel your current weight fits with your height?

Weight Status: Wellbeing & Response Patterns

Daily challenges associated with weight are not confined to overweight groups. More than a third of underweight respondents (35%) report daily difficulties – higher than slightly overweight (23%) and second only to significantly overweight (52%). The underweight group also shares a similar mental health burden with significantly overweight respondents (19% vs 22%). The pattern suggests that weight-related health interventions should address both ends of the spectrum, not only overweight.



- Global
- Underweight
- Self-assessed suitable weight
- Slightly overweight
- Significantly overweight



Key differences in actions taken concerning weight

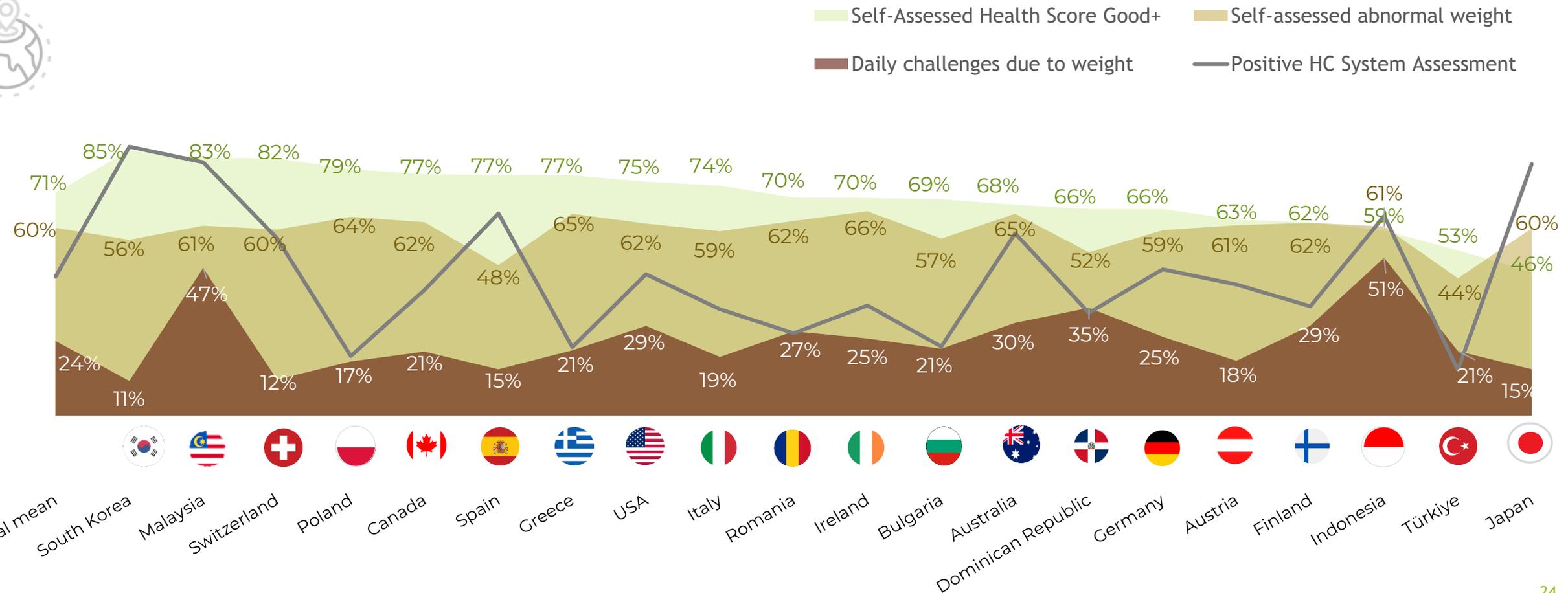
Underweight: health-focused – supplements (37%), quit alcohol (18%), doctor (25%)

Slightly overweight: balanced – eat (57%), exercise (48%), lose weight (49%)

Significantly overweight: weight-focused – lose weight (62%), but less exercise (40%)

Health Confidence: Personal vs Systemic

Countries with higher system confidence tend to report better self-rated health, suggesting that trust in the system shapes personal well-being. The CEE region exhibits the opposite pattern, with low system confidence and lower self-assessment reflecting a broader socioeconomic context. Southeast Asia presents a distinct case: high system trust coexists with elevated daily challenges, likely due to lower physiological thresholds at which weight affects health.



Thank you.



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