

The Confidence Gap

01 THE SHIFT

Women have taken the wheel on their own health.

64%

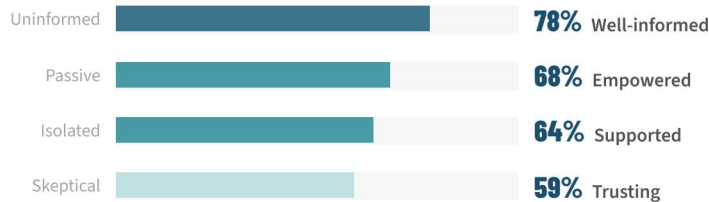
More self-directed than five years ago



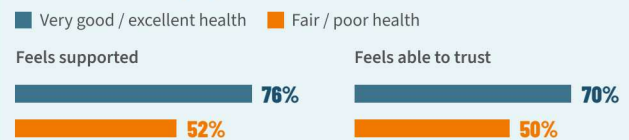
More self-directed health means a different role for brands: help her feel informed, confident and empowered to make her own choices.

02 AND HOW SHE FEELS TODAY

Sure of what she knows. Less sure anyone is behind her.



The women carrying the most feel it the least.



The opportunity is not more information. It is giving women greater confidence in what they already know.

03 HER DOCTOR

She still relies on her doctor for health guidance — though many have felt dismissed by one.

TOP TRUSTED SOURCES FOR HEALTH GUIDANCE



NEXT MOST TRUSTED SOURCES



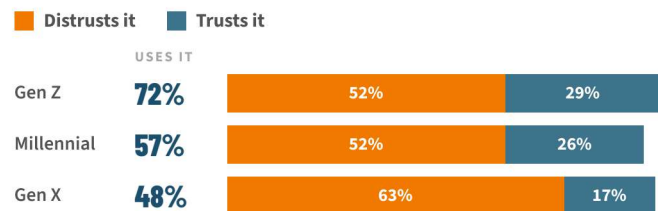
42% have felt dismissed by a healthcare provider

The doctor remains the authority. Brands have more to gain by reinforcing that trust than trying to replace it.

04 WHERE SHE LOOKS

Social media is widely consumed — but with a grain of salt.

Women use social media for health information far more than they trust it. Distrust runs especially deep even among the generations using it most.



1 in 5 women use AI for health information, but the verdict on trust is still forming.

Social media can win attention without winning trust. Exposure alone does not confer credibility.

05 WHAT BRANDS ARE MISSING

She'll pay more, but needs help figuring out what deserves her dollars.



101

84%

spend out of pocket on their health every month — a third of them more than \$100

To win more of her spend, brands need to speak with the authenticity of people she trusts — not the polish of marketing.



WHAT THIS MEANS

Women are taking more control of their health, but confidence has not kept pace — especially among those in poorer health, with less financial room, and among younger women. Her doctor remains the most trusted voice. **That leaves a clear role for brands: not to replace that authority, but to help her act with greater confidence through credible proof and trusted human voices.**