CATEGORY STUDY · HEALTH & WELLNESS · INDIA

A PRODUCT BY

In Indian wellness, emotion sells where evidence does not

1,218 Indian consumers, psychographically profiled across five wellness behaviours. What they believe, what they will actually pay for, and whose word they take.

1,218	142	5	8
verified respondents	cities across 31 states	behaviours mapped	psychographic archetypes

One driver never moved. Across every age group, city tier and psychographic type, **43.3% of this panel buys wellness for peace of mind.**

HOW IT WORKS

Five questions on how Indian consumers define, buy and evaluate wellness. 1,218 completions across 31 states and 142 cities, each respondent mapped to one of 8 psychographic types used across all MindLink studies.

HOW TO READ THIS

Stated attitudes, not sales data. Almost half of located respondents are in Maharashtra: concentrated, not nationally representative. Regular buyers are the 10.0% who buy regularly; the active group in Finding 05 adds occasional buyers.

WHY PSYCHOGRAPHIC PROFILING

Every respondent carries a full profile against the same eight archetypes used across 30+ MindLink categories, profiled ahead of Finding 07, so the same people stay readable by mindset, not only by market.

FINDING 01

They are paying for calm, not for health

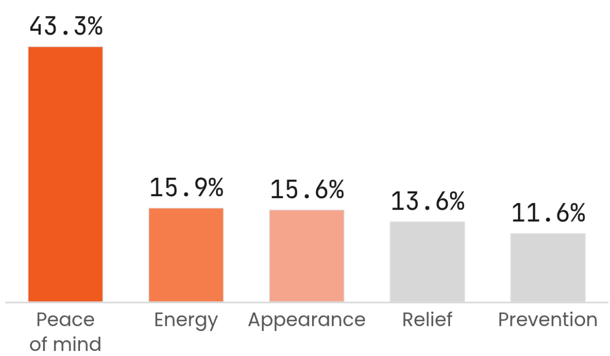
43.3%

spend on wellness for peace of mind, almost three times the next reason. Appearance reaches only 15.6%.

- **Prevention is the smallest motive at 11.6%,** and the only one that predicts a buying habit.
- **Beauty framing addresses a sixth of the market,** and the least valuable sixth at that.

> WHAT WE WOULD DO
>
> Sell reassurance and price it accordingly. This is an emotional category wearing a functional label.

What wellness spending is for



FINDING 02

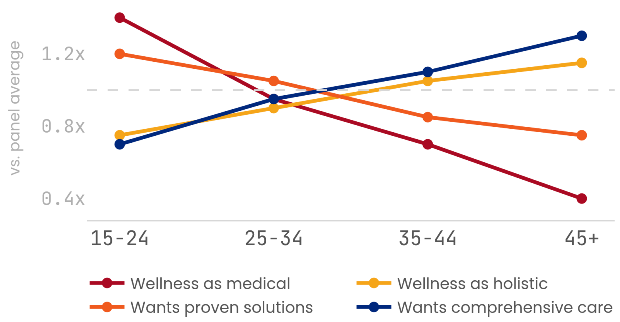
Gen Z treats wellness as clinical, and wants it proven

1.4× vs 0.4×

medical framing of wellness at 15–24 against 45-plus

- **Under-25s are the most clinically-oriented cohort.** They frame wellness as medical and are most likely to want proven solutions, at 1.2x.
- **Lifestyle messaging is the older buyer's mode.** 44% of this panel is under 25. Entry-level wellness communication may be pointing in the wrong direction.

Relative preference by age band · lines above the dashed line mark a cohort that over-indexes



FINDING 03

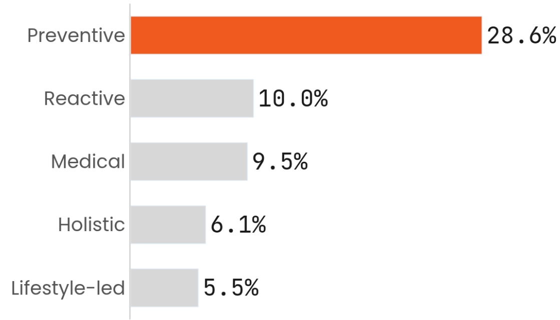
Only one belief converts

28.6%

of those who see wellness as preventive buy regularly, against 5.5% of the lifestyle-led group. That group is the largest in the study.

- **The biggest belief converts worst.** Lifestyle-led is 44.6% of the market and almost none of its regular buying.
- **Preventive believers are 14.9% of the market** and 42.6% of everyone who buys regularly.

Share of each belief group that buys regularly



WHAT WE WOULD DO

Recruit people into the preventive frame rather than the lifestyle one. It is the only belief here that arrives with a purchase habit attached.

FINDING 04

The older wellness buyer is won by what's on the label, not what's in the ad

1.8× vs **0.6×**

how 45-plus buyers index on holistic, preventive and comprehensive wellness, against brand messaging

- **Certification and ingredient transparency** build purchase confidence in this segment.

- Two segments stand in front of the same shelf and read completely different things. The natural seeker reads the brand; the older buyer reads the label.

Two different briefs, one shelf. Natural seekers trust a brand they recognise; 45-plus buyers trust a label they can verify.

FINDING 05

A third of this market is ready to buy wellness, and product complexity is the only thing in the way

34.7%	37.2%	28.1%
Absent from category · 423	Buys only on a trigger · 453	Buys actively · 342

- **423 panel members are category-ready on belief and motivation.** Their definition of wellness aligns exactly with that of active buyers.
- **Complexity is the barrier.** Simple, energy-first formats are what would convert them. The category's current offer is too involved for their needs.
- **The largest single opportunity in the data:** a third of the market that already believes, and just needs the right product format to begin buying.
- **This is a product brief, not a media brief.** The conversion lever is format simplicity, not more reach or frequency.

FINDING 06

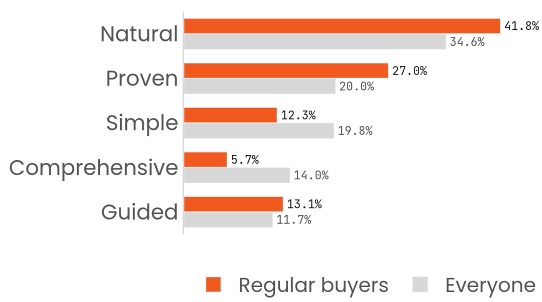
Buyers want natural and proven

68.8%

of regular buyers want a solution that is natural or clinically proven, against 54.6% of the market as a whole.

- **"Simple" collapses among buyers,** from 19.8% to 12.3%, and comprehensive from 14.0% to 5.7%.
- **Wanting it easy signals low engagement,** not a product requirement.

What kind of solution people want, regular buyers against everyone



THE EIGHT MINDLINK ARCHETYPES · the psychographic type every respondent is assigned to

Trailblazer 18.6%
Curious early adopter, balances novelty with pragmatism.

Ambitious 8.1%
Treats work, health and social progress as one unified project.

Believer 6.6%
Tradition-first; security in routine and trusted circles.

Geek 20.3%
Stability-seeking tech enthusiast, comfort over ambition.

Free-Spirited 12.1%
Values authentic connection over wealth or status.

Explorer 19.5%
Balances steady routine with genuine openness to the new.

Reformer 12.3%
Achievement through hard work and conventional norms.

Mediator 2.5%
Steadiness-first peacekeeper; stability over quick wins.

FINDING 07

Shoppers who want "natural" are won by the brand behind it

1.8×

brand trust index among non-metro natural solution seekers

- **Natural leads every other solution preference at 34.6%.** Non-metro natural seekers alone make up 21% of the panel.
- **A familiar brand name closes the sale.** Certification marks and lab claims do not earn trust in this group.
- **Free-Spirited types concentrate here at 1.7x.** They buy for relief and energy, not prevention.

What builds trust fastest, by archetype · darker cells indicate stronger pull

	Ambitious	Reformer	Geek	Explorer	Trailblazer	Mediator	Free-Spirited	Believer
Reviews	33	41	36	34	32	29	24	20
Certification	36	17	13	19	15	23	19	15
Ingredients	11	16	23	22	19	16	13	12
Doctor	12	10	15	15	15	5	15	26

- Across the trust heatmap, brand credibility outperforms product-level signals almost everywhere. The brand is the product.

WHAT THIS GIVES A BRAND

In this category the growth is not in more believers, it is in moving believers into the preventive frame. That group buys five times as often, and wants ingredients and evidence rather than ease.

Why this only works at panel scale

12.5pp

separate Explorers and Reformers on wanting natural solutions, at 37.8% against 25.3%. Metro and non-metro differ by about a point on every question here.

34.7%

are absent from the category, yet every one of them holds a firm view on what wellness is and whose word they would take. No sales file contains this group.

142 cities

1,218 consumers profiled across 31 states in seven weeks, with no new panel build and no field team. Widening this cell needs more of the same, not something different.

Base: 1,218 profiled consumers from 1,685 reached. Fielded 16 March to 7 May 2026 across 142 Indian cities in 31 states. Sourced from the MindLink panel of 70,000+ verified consumers across 30+ categories. Margin of error ±2.8 percentage points at 95% confidence. All figures are from directly observed responses. Multipliers show a segment's share of a response against the total panel.