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Voice of the Consumer 2026: India perspective

From wellness routines to connected care

October 2026

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Health and wellness are playing a more prominent role in how Indian consumers make everyday choices, extending beyond healthcare into food, fitness, personal care, technology, financial protection, and apparel. Rising wellness ambitions, greater digital engagement, and growing interest in preventive and clinically guided solutions are also changing what consumers value and expect from businesses. This year's report therefore uses a health lens to examine how these shifts are influencing consumer behaviour and creating opportunities across industries.

To explore these shifts, our Voice of the Consumer 2026 surveyed 21,808 adults across 27 countries and territories in February and March 2026, including 1,005 consumers across 15 states and two union territories in India. The survey examined consumers' health and wellness behaviours and goals, their engagement with technology and AI, their use of GLP-1 therapies, and their interest in health- and wellness-related products and services.



Key takeaways

01 Indian consumers demonstrate strong engagement with everyday wellness, but sustaining healthy behaviours remains a challenge. While 42% exercise daily, compared with 19% globally, 67% identify stress and fatigue—and an equal proportion, competing priorities—as barriers, underscoring the need for solutions that make healthy choices easier to maintain.

02 Digital health is already mainstream in India: Around 90% of consumers use health apps or wearables, compared with around 80% globally. The next frontier is translating digital engagement into useful insights and better health outcomes.

03 Clinical credibility is emerging as a key differentiator in connected health, with 81% of Indian consumers willing to pay more for wearable data trusted by healthcare professionals, compared with 65% globally. This creates an opportunity to connect self-tracking with expert guidance and more proactive, personalised care.

04 GLP-1 therapies are emerging as a catalyst for broader lifestyle change. Current use in India is nearly twice the global level (18% versus 10%), while future consideration among non-users is also higher (34% versus 28%). Further, 80% of Indian users report paying greater attention to nutrition, compared with 61% globally, signalling demand for integrated support beyond medication.

01 Executive summary

India's health consumer is moving beyond treatment-led care towards more proactive, preventive, and personalised health management. Food, fitness, sleep, mental wellbeing, and preventive care are increasingly being considered as connected parts of everyday health, expanding the opportunities for businesses to engage consumers beyond the point of illness.

This shift is particularly visible in India's adoption of health technology. In our Voice of the Consumer 2026, 42% of Indian consumers report exercising daily (vs 19% globally), while 90% use health apps or wearables (vs 80% globally). More than 90% are comfortable allowing AI to support at least one health-related activity, and 81% would pay more for wearable data that can be reviewed and trusted by healthcare professionals. India has therefore moved beyond early digital adoption; the next source of value will come from translating engagement and data into credible insights, better decisions, and improved health outcomes.

Yet India's health journey will not become exclusively digital. Family and community influence, trusted local chemists, affordability, and clear product information continue to shape consumer decisions. Businesses will need to combine digital convenience with human reassurance, transparent communication, and accessible delivery, enabling consumers to move more seamlessly between everyday wellness, digital support, and professional care.

Consumers are also expanding their view of wellbeing across physical activity, mental wellness, nutrition, and preventive health. At the same time, interest in clinically guided solutions such as GLP-1 therapies points to growing demand for measurable outcomes and ongoing support. Increasingly, consumers are seeking not only products and services, but also solutions that can help deliver meaningful health outcomes and support long-term behaviour change.

However, strong ambitions do not always translate into sustained action. Stress, competing priorities, and information overload can make healthy behaviours difficult to maintain over time, creating opportunities for businesses that can simplify decision-making, reduce friction, and provide guidance that fits naturally into consumers' lives.

These expectations are not uniform. Indian consumers differ in the outcomes, experiences, and forms of value they seek—from measurable progress and financial benefits to community participation, everyday integration, and simplicity. Understanding these distinct demand pools will be critical for businesses deciding which consumers to prioritise, how to tailor propositions, and where to pursue adjacent growth opportunities.

India's health and wellness market is therefore entering a new phase. Consumer intent and digital engagement and openness to innovation are already strong, but leadership will increasingly depend on helping consumers achieve meaningful outcomes, sustain healthier behaviours, and navigate an increasingly diverse set of health and wellness choices. Businesses that combine clinically credible insights, accessible delivery, and propositions tailored to distinct consumer needs will be best placed to shape the next stage of growth.

02 The shifts reshaping consumer health in India

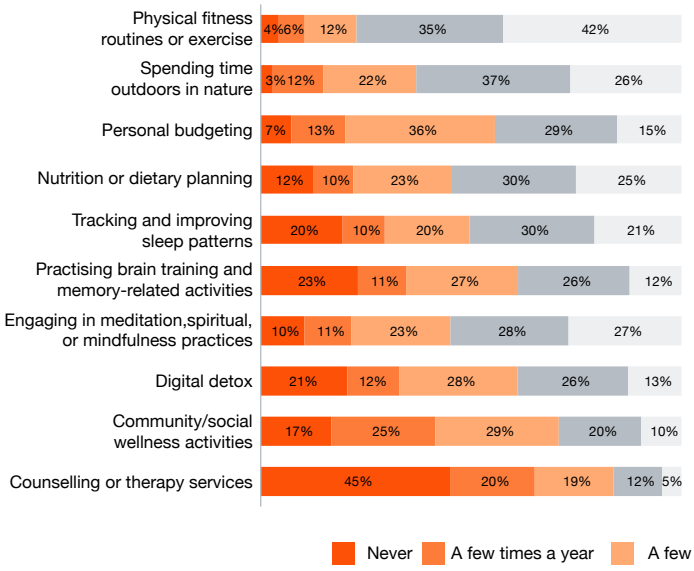
(1) Health and wellness are becoming embedded in everyday life

Health and wellness are increasingly becoming a part of everyday life in India. Consumers are expanding their view of health beyond treatment and illness to encompass the routines, relationships, and choices that shape wellbeing every day.

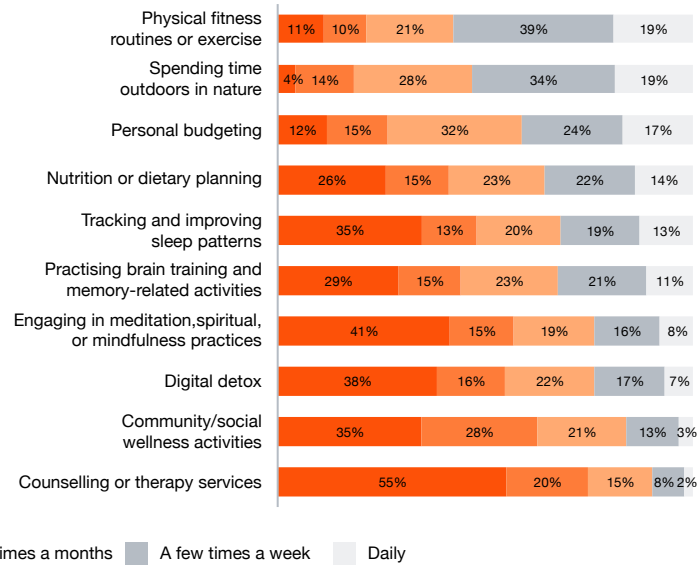
Daily fitness is part of the routine for many Indian consumers

How often, on average, do you practice the following health and wellness activities?

Indian consumers
Base: 1,005



Global consumers
Base: 21,808



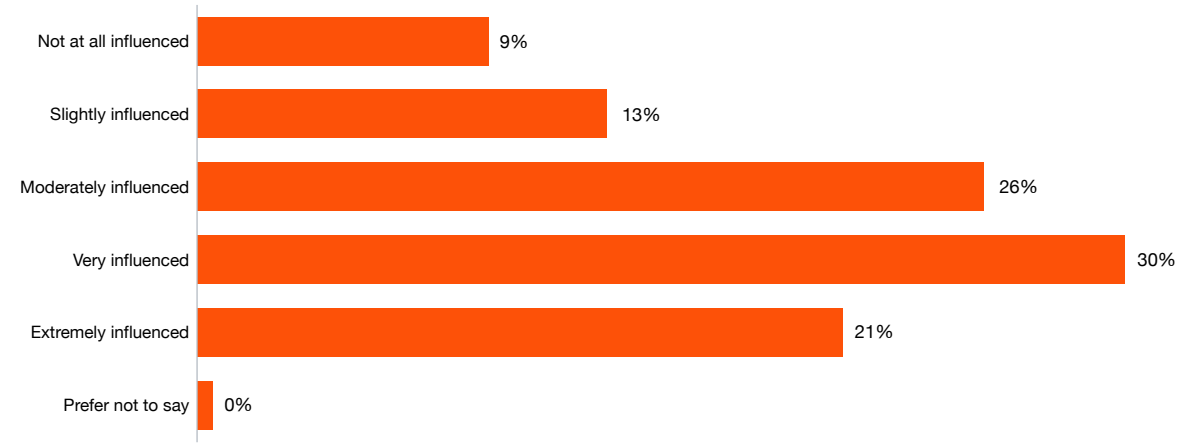
Source: PwC's Voice of the Consumer Survey 2026

Fitness and mindfulness are becoming established parts of everyday wellness routines, signalling a shift from reactive healthcare towards continuous self-management. Across the survey, 97% of the consumers report a strong focus on longer-term health and wellbeing, with longevity, stress reduction, and better sleep among their leading priorities. Nutrition is becoming a more prominent part of everyday wellness, with consumers paying closer attention to food quality, nutritional intake, and broader food-safety and environmental considerations.



Family and community continue to influence health decisions

To what extent do family traditions or community practices influence your health and wellness decisions?



Base: India respondents (n=1,005)

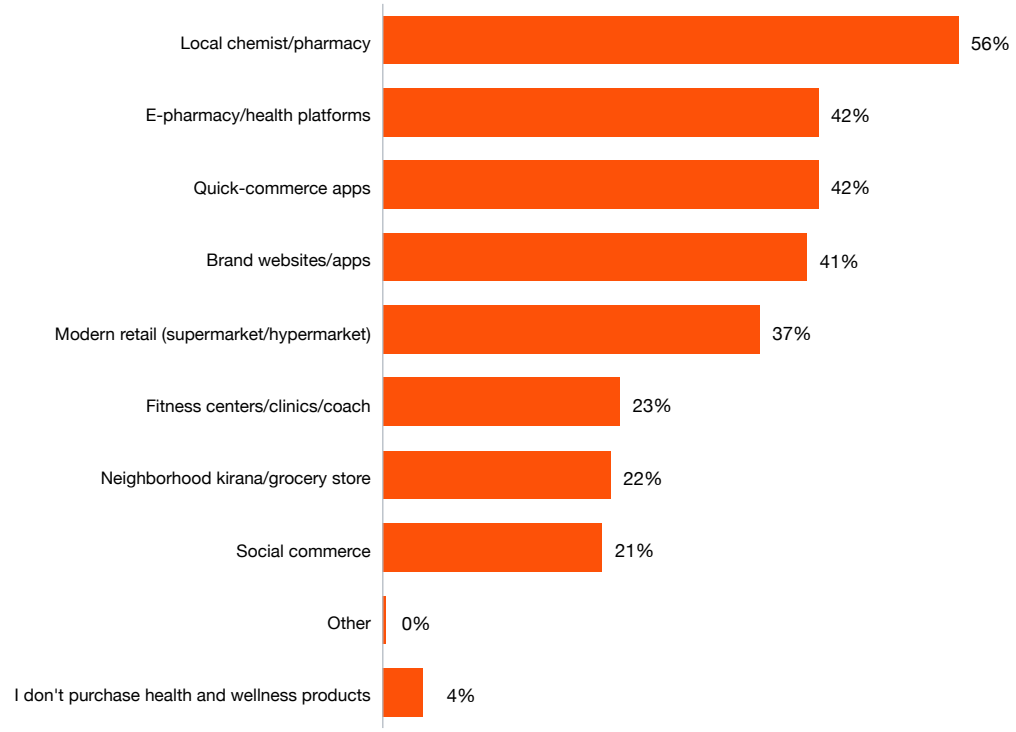
Source: PwC's Voice of the Consumer Survey 2026

Some businesses have developed offerings that reflect the role of family, culture, and community in health and wellness decisions. For example, MedPlus Advantage provides membership-based access to selected diagnostic and consultation services, with health-check packages available for families,[1] while MediBuddy vHealth[2] offers healthcare membership plans combining consultations, health check-ups, and related benefits. Further, Amway India's Nutrilite Ayurveda range illustrates how contemporary products can be positioned within established Indian wellness traditions, supported by information on ingredients, sourcing, quality testing and intended use.[3] Together, these examples demonstrate how businesses can respond to household needs and established wellness practices without assuming that one approach will suit every consumer. They also highlight the importance of clearly communicating a product or service's purpose, benefits, and intended use, helping consumers assess its relevance within their family and cultural contexts.

1 Health Centre, MedPlus Membership Benefits: Is It Really Worth It? (accessed as of 28 September 2026)
2 MediBuddy vHealth (accessed as of 7 October 2026)
3 Amway, Nutrilite Ayurveda (accessed as of 28 September 2026)

Local chemists remain important as digital purchasing grows

Where do you typically purchase health and wellness products/services?



Base: India respondents (n=1,005); multiple responses allowed

Source: PwC's Voice of the Consumer Survey 2026

Local chemists or pharmacies remain the most widely used channel for health and wellness purchases, alongside e-pharmacies and health platforms, and quick-commerce apps. This signals the emergence of hybrid purchasing journeys rather than the replacement of traditional channels by digital alternatives.

Each channel can play a distinct role in the consumer journey. Digital channels can provide convenience, product discovery, reminders, and repeat purchasing, while local chemists offer accessibility, familiarity, and human reassurance. Brands should deliver consistent product availability, information, and service across channels while recognising the differentiated sources of value and trust that each provides. Together, these channels are creating more flexible and personalised health journeys, allowing consumers to move between convenience, trust, and professional support as their needs evolve.

From everyday wellness to preventive health

Indian consumers are already demonstrating strong commitment to health and wellness. The next opportunity is to help consumers build on these behaviours through guidance, support, and preventive-health solutions that fit naturally into their routines. Stress, fatigue, and competing priorities can make it difficult for consumers to sustain healthy behaviours over time. Businesses therefore need to reduce the effort required to act by offering clear guidance, manageable interventions, and continuing support that fits into everyday routines.

Everyday wellness habits provide a strong foundation for preventive health and create opportunities to extend consumer engagement into earlier risk identification, personalised intervention, and longitudinal care. Together, these shifts are contributing to the evolution of a new healthcare model that places greater emphasis on prevention, personalisation, and action before disease becomes symptomatic. The goal changes from the traditional focus on increasing lifespan to increasing health span—i.e. years spent in good physical and mental health. This requires screening and diagnostics to identify risk early, clinically validated interpretation to guide intervention, and longitudinal follow-up to support measurable outcomes. Fitness and mindfulness can reinforce the preventive-health journey, while family networks, trusted local channels, and digital platforms can support education, participation, and continuity when integrated with qualified clinical care and appropriate safeguards. Examples of this shift include Apollo Hospitals' ProHealth programme, which combines screening, predictive risk assessment, specialist interpretation, and personalised follow-up;[4] India's Ayushman Bharat Health and Wellness Centre model, which links community risk assessment and population-based non-communicable diseases (NCD) screening with medical confirmation, intervention, referral, and follow-up;[5] and Fitterfly's India-based diabetes digital-therapeutics model, which translates continuous biomarker monitoring into personalised nutrition, exercise, and behavioural interventions supported by multidisciplinary coaching.[6] Together, these examples illustrate different approaches to extending preventive health beyond one-off interventions towards ongoing risk management and longitudinal support.

What this means for consumers and businesses

The boundaries between wellness, healthcare, and prevention are becoming increasingly blurred. For consumers, this creates more opportunities to access products, services, and guidance that support health throughout everyday life. For businesses, the opportunity lies in connecting trusted experiences, accessible channels, and preventive-health solutions into a more seamless consumer journey.

4 Apollo Hospitals, Health of the Nation 2025 (accessed as of 28 September 2026)

5 National Health Authority, Ayushman Bharat Digital Mission (accessed as of 29 September 2026)

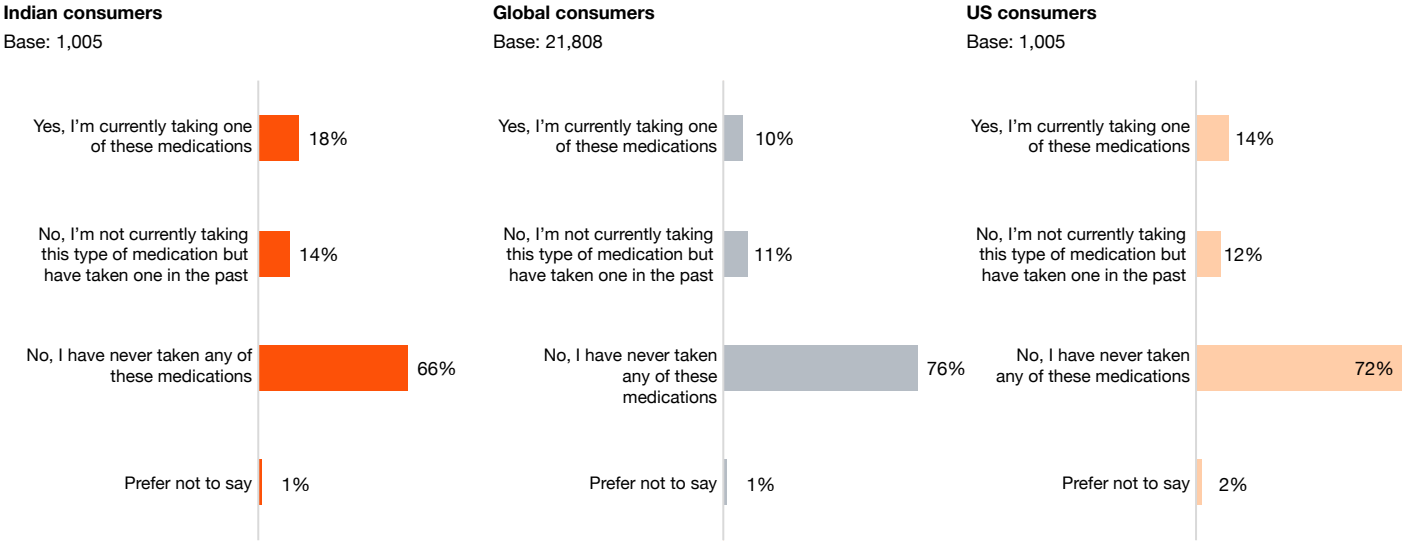
6 Fitterfly (accessed as of 7 October 2026)

(2) GLP-1 therapies in India are emerging as a notable part of weight and metabolic-health management

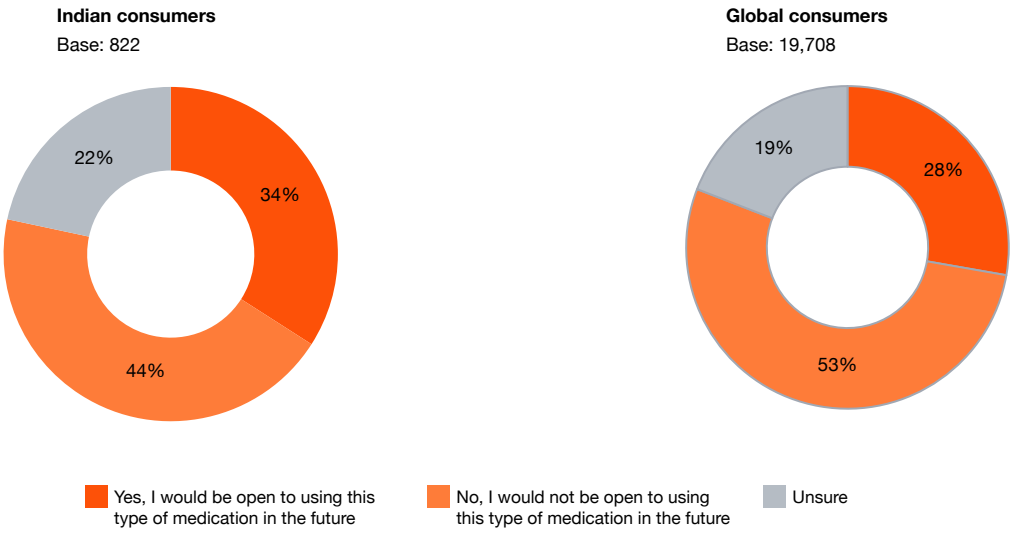
As Indian consumers take a more proactive approach to managing their health, interest is growing in clinically guided solutions that deliver measurable outcomes. GLP-1 therapies are emerging as one such category, sitting at the intersection of weight management, metabolic health, and broader lifestyle transformation.

Consumer receptivity signals the next phase of India's GLP-1 market

Do you currently take a GLP-1 prescription medication for type 2 diabetes and/or weight loss? (e.g. Ozempic, Mounjaro, Wegovy, Zepbound)?



Would you be open to taking a GLP-1 prescription medication for type 2 diabetes and/or weight loss in the future?



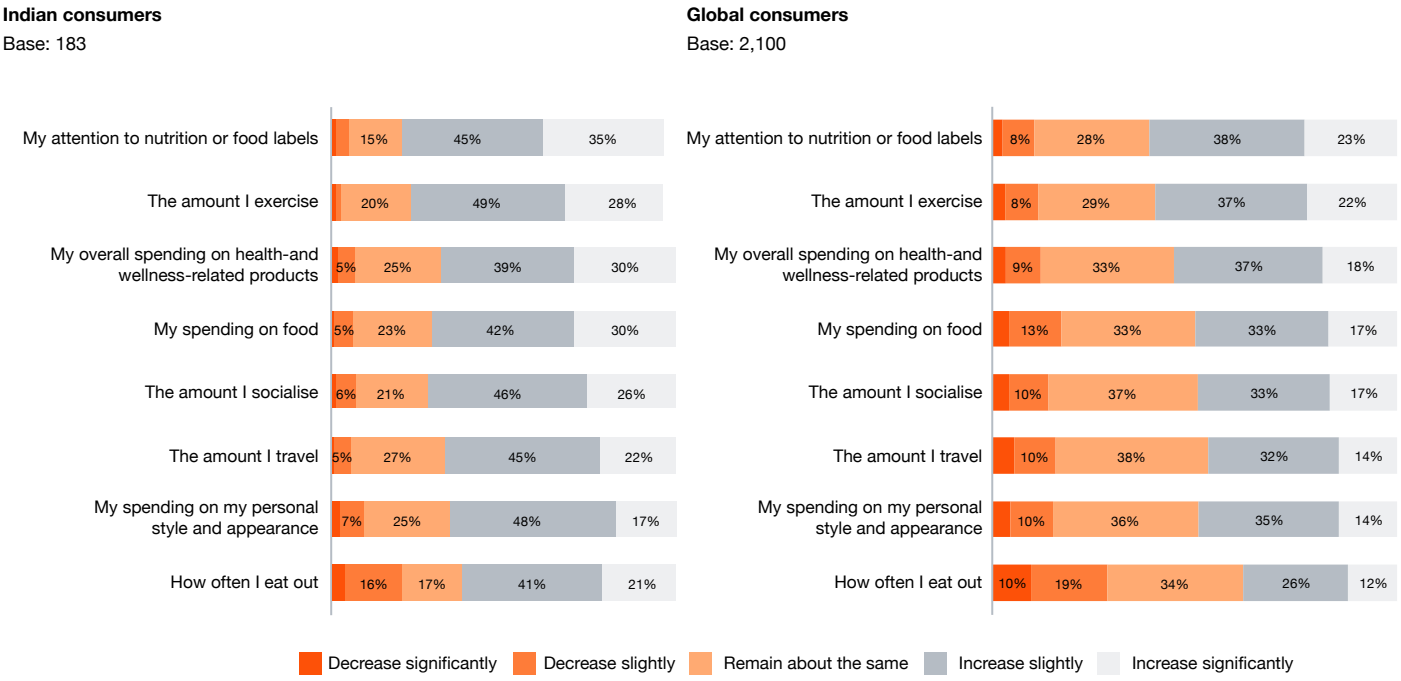
Base: Respondents who have not taken GLP-1 prescription medication

Source: PwC's Voice of the Consumer Survey 2026

The launch of semaglutide-based therapies by companies such as Sun Pharmaceutical Industries Ltd (Noveltreat, Sematrinity),[7] Alkem Laboratories Ltd (Semasize, Obesema and Hepaglide),[8] and Zydus Lifesciences Ltd (Semaglyn$_{TM}$, Mashema$_{TM}$ and Alterme$_{TM}$)[9] following semaglutide's patent expiry marks a transition from scarcity-led to ecosystem-led competition in India's GLP-1 market. Programmes from companies such as Healthify,[10] GOQii,[11] and BeatO[12] illustrate how value is shifting beyond medication towards connected care models that combine GLP-1 therapy with nutrition, behavioural support, and continuous monitoring. Consumer openness suggests that the next phase of growth may be driven not only by current users, but also by a wider group of consumers actively considering clinically guided weight-management and metabolic-health solutions. The opportunity is therefore moving from enabling weight loss to delivering sustained metabolic-health outcomes.

GLP-1 users in India report broader lifestyle changes

Since using these weight-loss prescription medications, how, if at all, have each of the following behaviours or activities changed for you?



Base: Respondents who have taken GLP-1 prescription medication

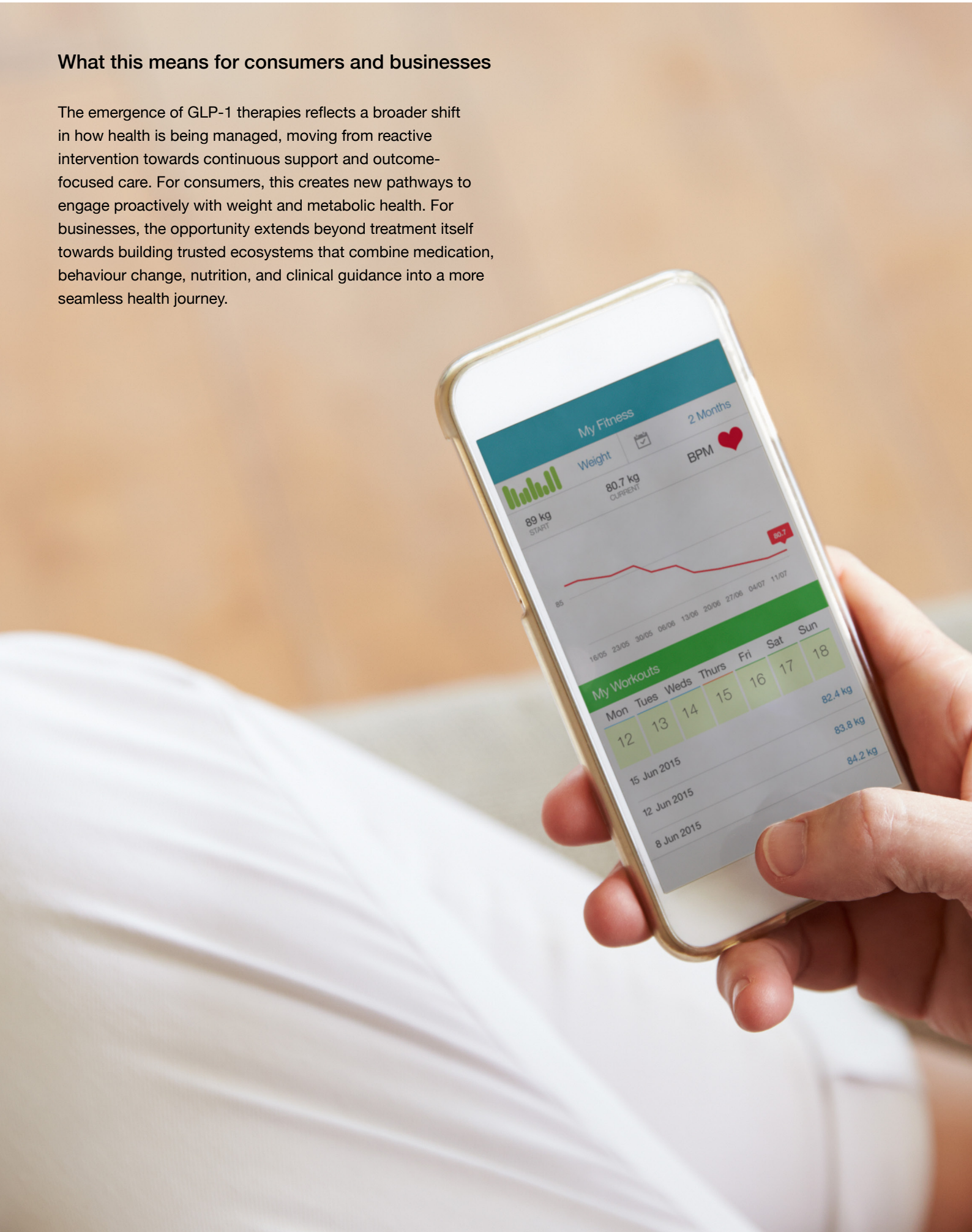
Source: PwC's Voice of the Consumer Survey 2026

Indian GLP-1 users demonstrate greater engagement with health than their global peers, with behavioural changes extending beyond treatment into nutrition, fitness, and wider lifestyle choices. This suggests that GLP-1 therapies may catalyse wider behaviour change and serve as an entry point into integrated care models combining medication, lifestyle support, and clinical guidance. As a result, demand may increasingly shift from standalone treatment towards continuous, outcome-focused care.

7 Sun Pharma, Sun Pharma launches its semaglutide injection under the brand names, Noveltreat and Sematrinity in India (accessed as of 28 September 2026)
8 Alkem, Alkem Laboratories launches semaglutide injection in India at weekly therapy cost starting INR 450 (accessed as of 29 September 2026)
9 Zydus, Zydus launches Semaglutide Injection in an innovative, reusable multi-dose pen device in India (accessed as of 29 September 2026)
10 HealthifyRx, Lose weight with medication. Keep it off with HealthifyRx (accessed as of 30 September 2026)
11 GOQii SmartRx, Smarter Weight Loss with Medical Experts & Holistic Support. (accessed as of 30 September 2026)
12 BeatO, How this GLP-1 Based Program Works (accessed as of 30 September 2026)

What this means for consumers and businesses

The emergence of GLP-1 therapies reflects a broader shift in how health is being managed, moving from reactive intervention towards continuous support and outcome-focused care. For consumers, this creates new pathways to engage proactively with weight and metabolic health. For businesses, the opportunity extends beyond treatment itself towards building trusted ecosystems that combine medication, behaviour change, nutrition, and clinical guidance into a more seamless health journey.

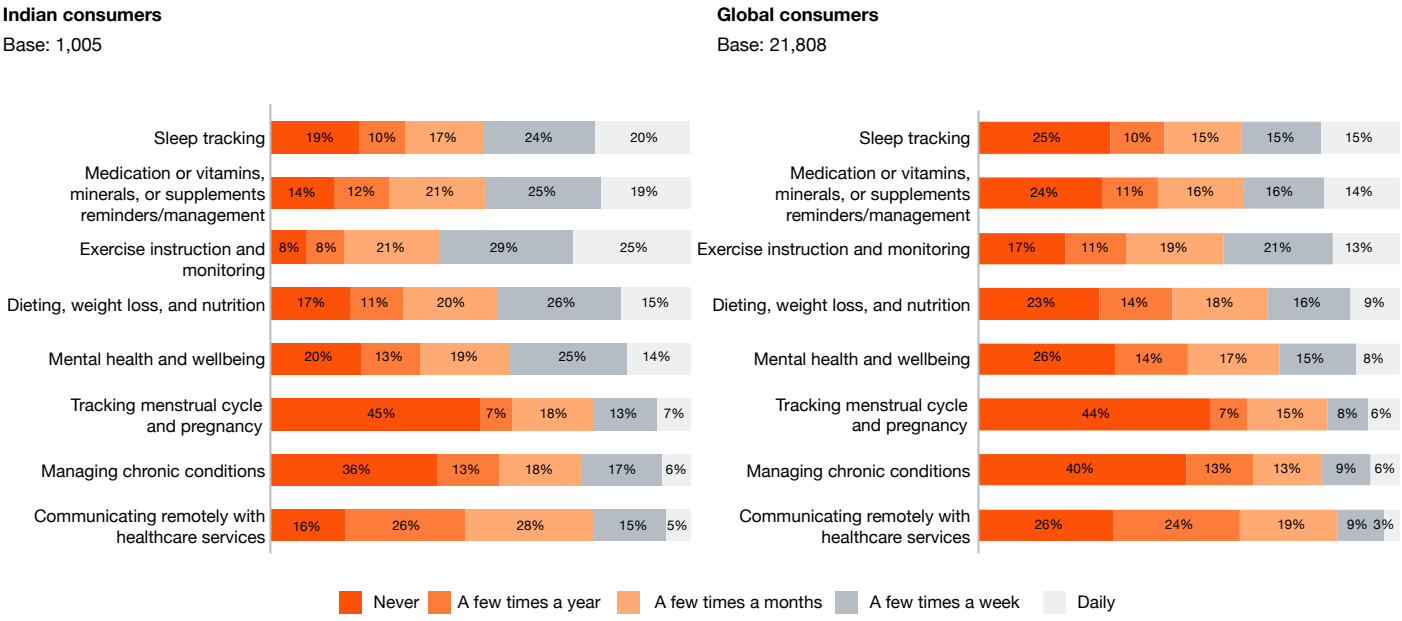


(3) Digital readiness is reshaping India's health journey, but trust will determine adoption

India's digitally engaged consumers have already integrated technology into many aspects of the health journey, from wellness and prevention to care management. The opportunity now lies in moving beyond digital engagement alone towards solutions that can translate consumer engagement into better decisions, earlier interventions, and improved health outcomes.

Health apps and wearables are becoming embedded in India's health journey

To what extent do you currently use health apps or wearable devices (e.g. fitness trackers or smartwatches) for the following purposes?



Source: PwC's Voice of the Consumer Survey 2026

Health apps and wearables are increasingly becoming a gateway to health management in India, supporting a wide range of activities spanning fitness, nutrition, sleep, medication management, and wellbeing. The next source of value is likely to come not from data collection alone, but from the ability to translate engagement into actionable insights that support better health decisions and outcomes. For example, Ultrahuman[13] combines metabolic and recovery tracking, Apollo 24|7[14] connects digital engagement with healthcare services, and HealthifyMe Private Limited[15] provides technology-enabled nutrition and wellness support. These three cases illustrate how digital health tools are becoming integrated into broader care pathways. As adoption matures, competitive advantage is likely to come from combining personalisation and convenience with clinical validation and professional oversight.

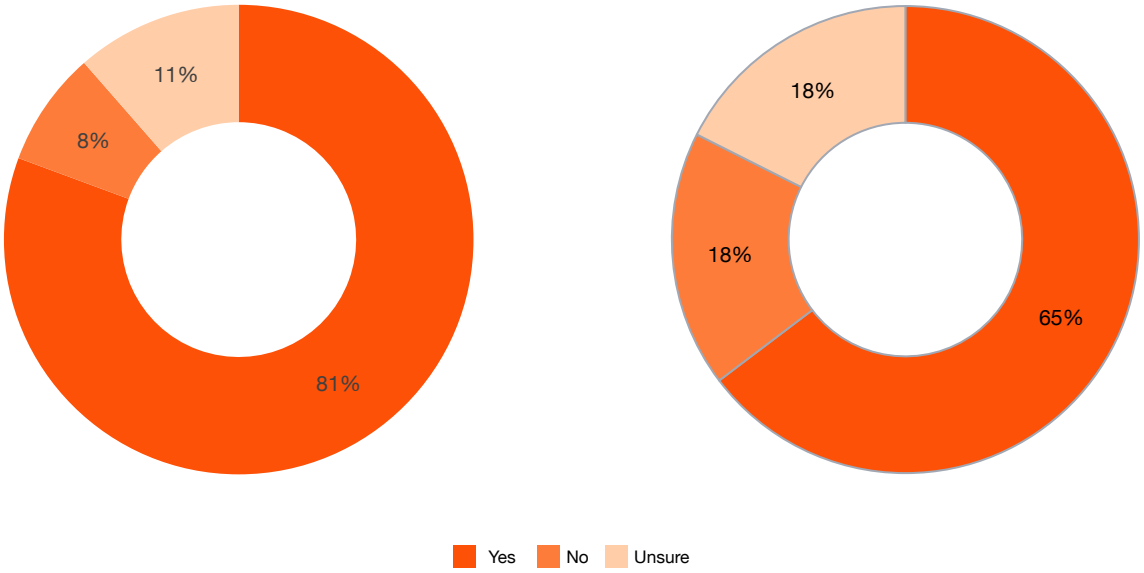
13 Ultrahuman (accessed as of 29 September 2026)
14 Apollo 24|7 (accessed as of 29 September 2026)
15 Healthify, Meet Healthify. Health Made Easy With AI (accessed as of 7 October 2026)

Clinical validation emerges as a key driver of wearable monetisation in India

Would you be willing to pay more for a wearable device whose data is trusted by healthcare professionals and can be reviewed by them to support your health and wellness care?

Indian consumers
Base: 909

Global consumers
Base: 17,503



Base: Respondents who use health apps or wearable device

Source: PwC's Voice of the Consumer Survey 2026

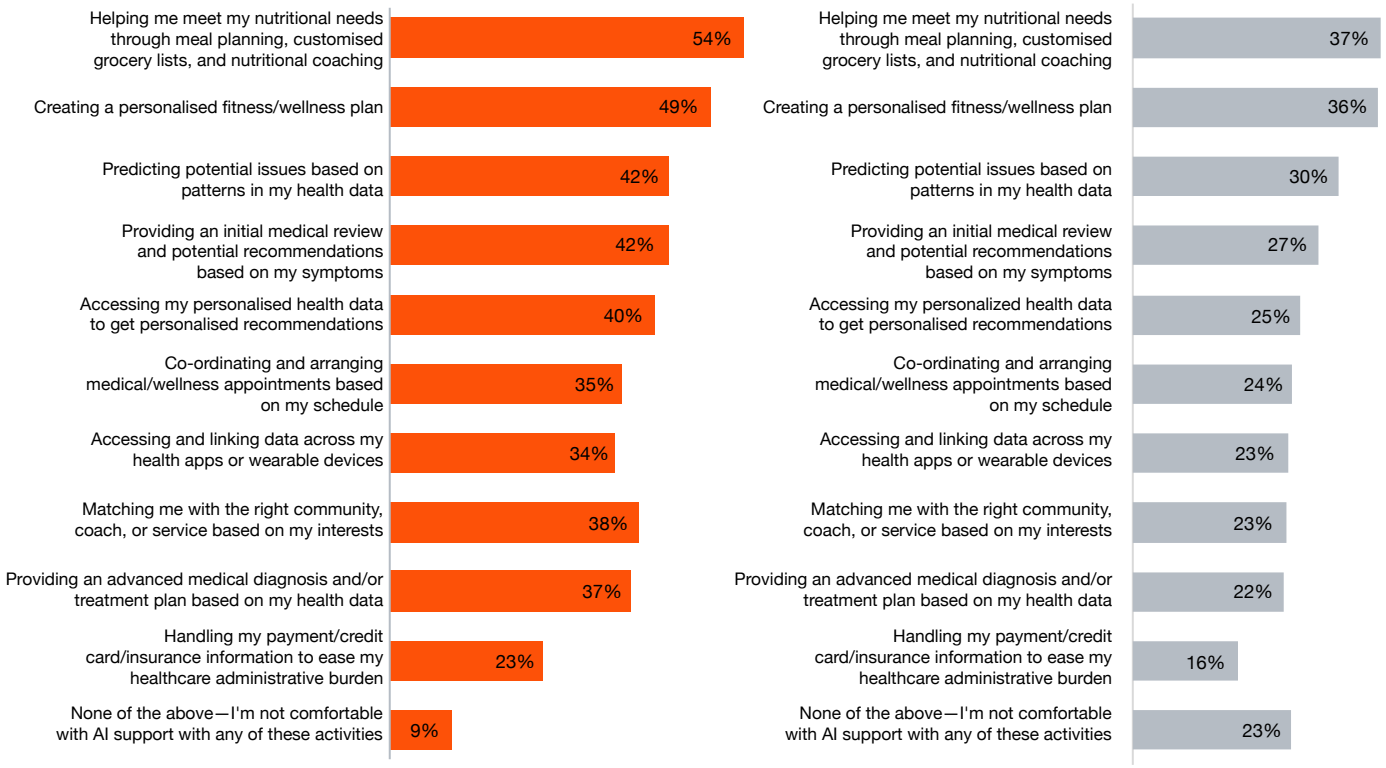
As wearables become more widely adopted in India, the source of differentiation is likely to shift from devices themselves to the credibility of the insights they generate. The strategic opportunity lies in connecting consumer-generated data with clinical expertise, enabling wearables to evolve from lifestyle tools into platforms that support more proactive, personalised, and outcome-oriented health management. Examples such as Ultrahuman[16] and Apple Watch[17] illustrate how premium wearable propositions are increasingly competing on the quality of health insights they deliver rather than on hardware alone. This reflects a broader shift from tracking activity to supporting outcomes, with value increasingly determined by the relevance and usefulness of the insights generated.

16 Ultrahuman (accessed as of 29 September 2026)

17 Apple Inc., Apple Watch (accessed as of 29 September 2026)

Indian consumers are more comfortable using AI for health support

Which of the following health and wellness tasks, if any, would you be comfortable allowing AI to perform?



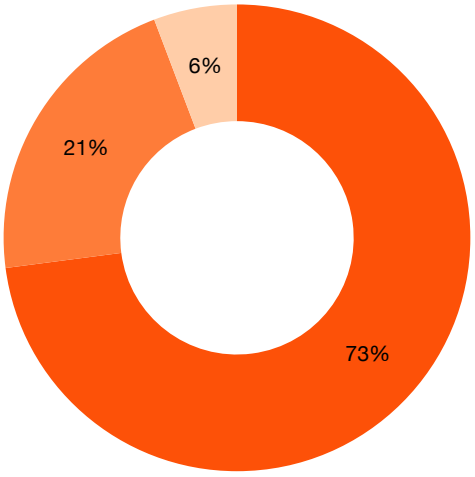
Source: PwC's Voice of the Consumer Survey 2026

AI is becoming an important gateway to health information in India, influencing consumer decision-making. Consumer openness extends beyond wellness and lifestyle applications into areas such as nutrition support, care navigation, and selected clinical use cases, reflecting a growing willingness to engage with AI across the health journey. However, long-term value will depend not on automation alone, but on the ability to combine AI-driven convenience with transparency, clinical validation, and professional oversight. Organisations that can position AI as a trusted complement to healthcare, rather than a substitute for it, are likely to be best placed to drive adoption and improve outcomes.

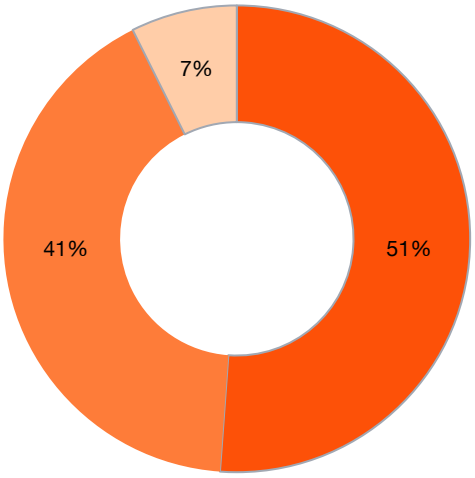
AI is becoming an early source of health information in India

When you first have a health or wellness question or concern, do you use AI tools to find information?

Indian consumers
Base: 1,005



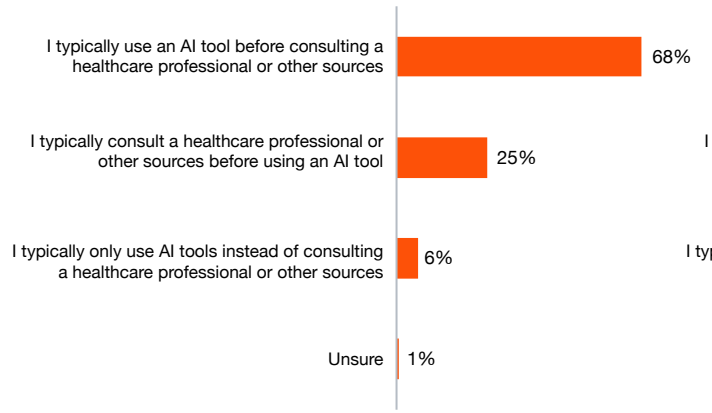
Global consumers
Base: 21,808



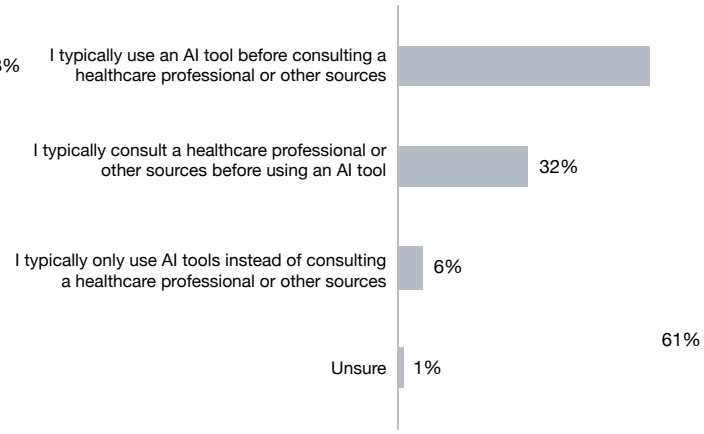
Yes No Unsure

At what point do you typically use AI tools when searching for information about a health or wellness question or concern?

Indian consumers
Base: 733



Global consumers
Base: 11,155



Base: Respondents who have used AI tools for health or wellness questions or concerns

Source: PwC's Voice of the Consumer Survey 2026



Around 73% of Indian respondents use AI when they first encounter a health or wellness question. Among consumers who already use AI for health-related queries, 68% consult AI before a healthcare professional, while 25% consult a healthcare professional first and 6% rely entirely on AI. Younger consumers are generally more receptive to digital health services and often combine online health resources with traditional healthcare interactions. Digital platforms, social media, and connected technologies are increasingly part of Gen Z's broader health and wellness journey even as professional advice continues to play an important role.[18]

India's national telemedicine platform, eSanjeevani, illustrates how AI can complement professional healthcare at scale. Its Clinical Decision Support System enables consistent and structured capturing of patient information and provides AI-based differential diagnosis recommendations, supporting, rather than replacing, clinician decision-making.[19] Similar principles are increasingly evident across India's digital health ecosystem. Platforms such as MediBuddy,[20] Practo,[21] and Apollo 24|7[22] use digital tools to improve healthcare access, patient engagement, and care coordination while maintaining professional oversight.

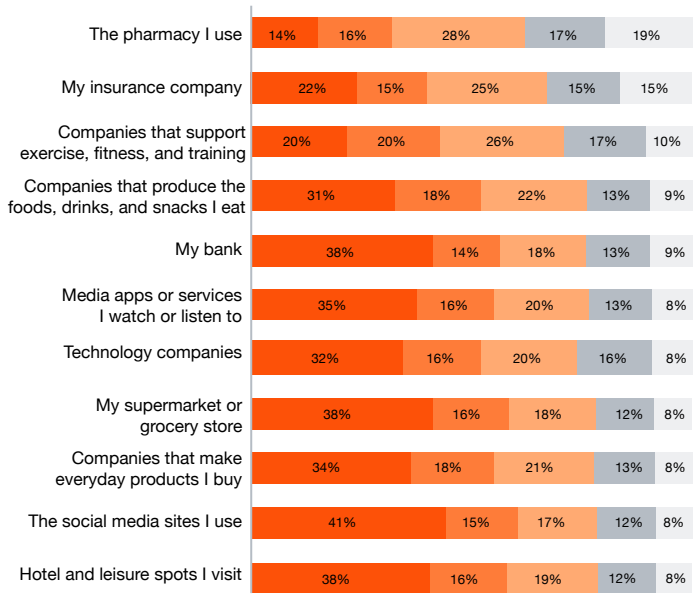
These examples suggest that consumers are embracing AI-enabled health experiences not as a substitute for professional care, but as a means of improving access, convenience, and informed decision making. AI is beginning to reshape how consumers access, navigate, and engage with healthcare, extending support beyond traditional points of interaction. The long-term opportunity lies not simply in expanding access to information, but in improving care navigation, clinical decision-making, and ultimately health outcomes.

18 The Economic Times, Health, hustle and hashtags: What keeps Gen Z ticking (accessed as of 8 October 2026)
19 Ministry Of Health And Family Welfare, National Ai-Driven Health Initiatives (accessed as of 29 September 2026); PIB release (accessed as of 29 September 2026)
20 MediBuddy (accessed as of 29 September 2026)
21 Practo (accessed as of 29 September 2026)
22 Apollo 24|7 (accessed as of 29 September 2026)

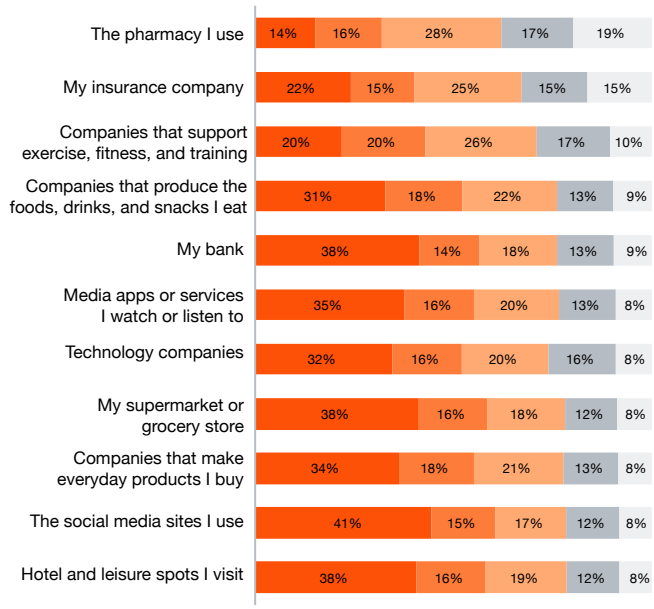
Consumers are more willing to share health data with organisations they trust

Please select the level of health data you would be comfortable sharing with the following types of product/service providers, if they were able to use the data to give you more personalised products/services."

Indian consumers
Base: 1,005



Global consumers
Base: 21,808





Source: PwC's Voice of the Consumer Survey 2026

Indian consumers show a willingness to share health data with a broad range of organisations when doing so could enable more personalised products and services. However, willingness varies significantly by organisation type. When it comes to pharmacies, insurers, and companies that support exercise, fitness, and training, consumers have the highest levels of comfort with sharing detailed or biometric health information. This suggests that consumers are more receptive when organisations have a clear and credible connection to health and wellbeing. Clearly, opportunities for more personalised health propositions exist, provided consumers understand how their data will be used and the value they will receive in return.

Comfort levels are lower for organisations perceived to be further removed from health-related activities, including supermarkets, everyday consumer-goods companies, and social media platforms. This suggests that consumers distinguish between organisations they view as legitimate users of health information and those they perceive as less directly connected to their health and wellbeing.

The findings indicate that the opportunity to develop personalised health experiences will depend not only on data capabilities, but also on an organisation's ability to demonstrate relevance and value. Organisations that can translate data into meaningful consumer benefits will be better positioned to deepen engagement and unlock the benefits of personalisation.

What this means for consumers and businesses

The opportunity in digital health is no longer defined by adoption alone. As technology becomes embedded across the consumer health journey in India, the challenge is increasingly one of trust, credibility, and meaningful outcomes. Consumers continue to place a premium on trusted data, clinically validated insights, and organisations they perceive as legitimate stewards of health information.

For healthcare providers, insurers, wearable manufacturers, and digital-health platforms, the opportunity lies in translating digital engagement into better decisions, earlier interventions, and more connected models of care. Organisations that can combine technology, health insights, and healthcare delivery into a seamless experience will be best positioned to create long-term value and improve health outcomes.

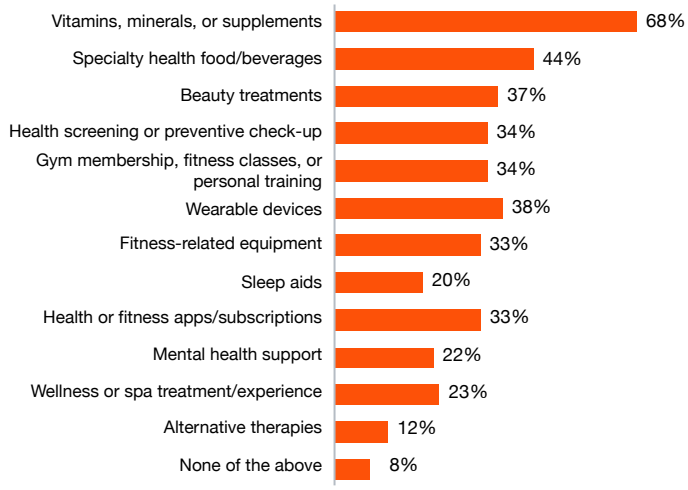
(4) India's wellness ambitions are testing the industry's ability to deliver

Indian consumers demonstrate strong health and wellness ambitions, reflected in both their spending patterns and broader wellbeing goals. The opportunity now lies in helping consumers translate those ambitions into sustained behaviours. This is increasing demand for products, services, and experiences that make healthy choices easier to understand, access, and maintain over time.

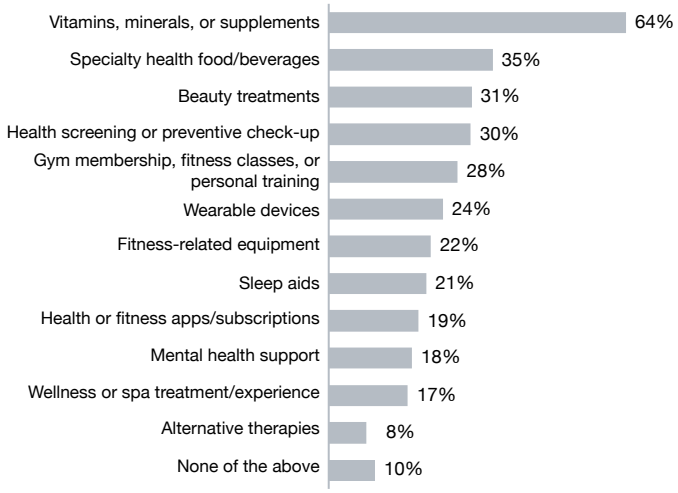
Wellness ambitions are translating into spending across categories

Thinking about the last 12 months, which of the following discretionary purchases have you made to support your personal health and wellbeing?

Indian consumers
Base: 1,005



Global consumers
Base: 21,808



Source: PwC's Voice of the Consumer Survey 2026

Consumer spending reflects a growing willingness to invest in health and wellness across a broad range of products and services. Demand is expanding across technology-enabled solutions, everyday nutrition, and preventive-health categories, creating opportunities for businesses to engage consumers throughout their wellness journey. As consumers seek to translate wellness goals into everyday behaviours, growth is likely to favour propositions that make healthy choices easier to access, understand, and sustain.

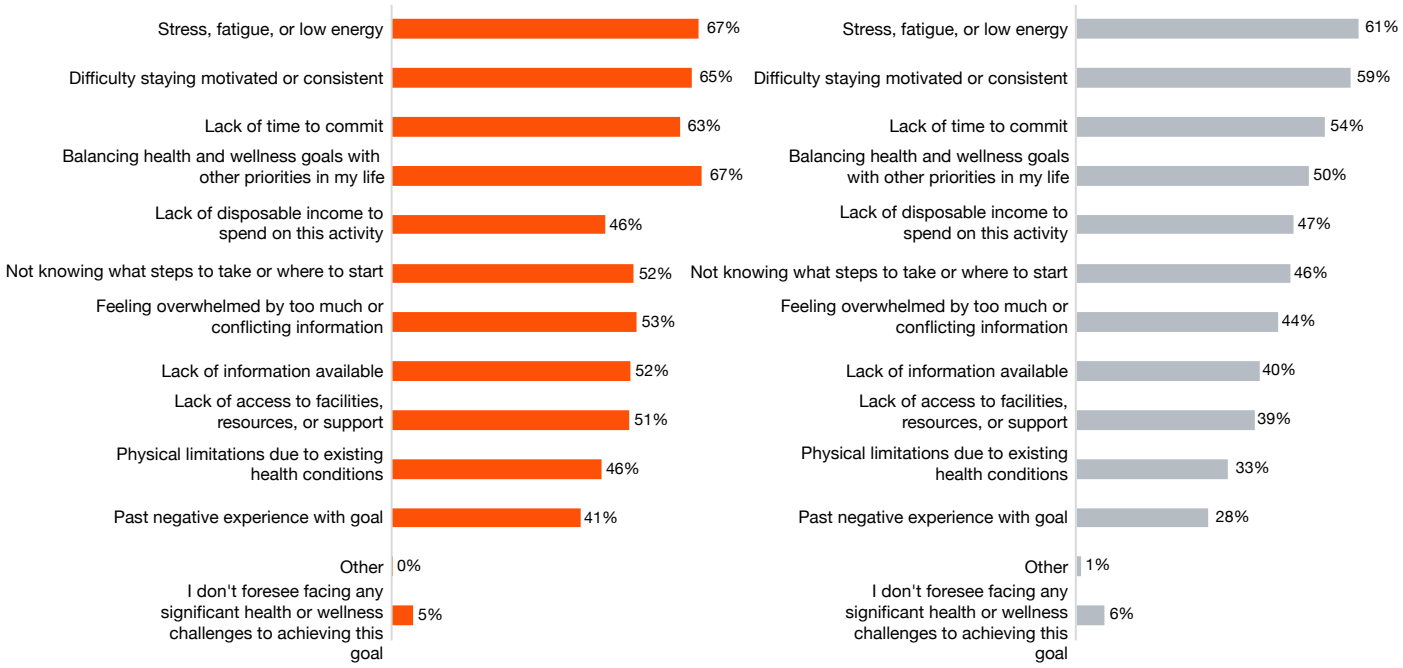
Wellness spending is moving into everyday consumption occasions

Consumer demand is extending beyond supplements and formal wellness services into everyday food and beverage choices. Convenient breakfast formats, functional beverages, and healthier snack options are making it easier for consumers to incorporate wellness into daily routines. Growth in categories such as low- and no-sugar beverages suggests increasing interest in products that combine convenience with perceived health benefits, although many categories remain at an early stage of development.[23]

Quick commerce is also emerging as an important channel for these everyday wellness occasions. The growth of breakfast and healthy snack categories on quick-commerce platforms suggests that consumers are increasingly seeking convenient ways to access nutrition-focused products. This trend is expanding the reach of functional and wellness-oriented products beyond major metropolitan markets and helping integrate wellness into everyday consumption habits.[24]

Wellness ambitions are widespread, but consumers face barriers to sustained action

Thinking about your health and wellness goals, which of the following challenges, if any, do you face in achieving each of them?



Base: Respondents who have a health and wellness goal

Source: PwC's Voice of the Consumer Survey 2026

Indian consumers demonstrate strong health and wellness ambitions, creating opportunities for products and services that help translate goals into everyday action. However, stress, fatigue, competing priorities, and information overload can make healthy behaviours difficult to sustain. Businesses that simplify decision-making and provide clear, credible, and actionable guidance will be better positioned to turn wellness aspirations into long-term engagement.

23 Times Now, Zero-Sugar Boom: Why India's Rs 60,000-Crore Sweet Drink Market Is Getting a Health Reset (accessed as of 29 September 2026)

24 Lapaas Voice, Quick Commerce food retail is changing how India eats (accessed as of 8 October 2026);
Outlook India, Consumer Trends Shaping India's Healthy Snack Category (accessed as of 8 October 2026)

Wellness spending is extending from products to paid guidance and ongoing support

Indian consumers are beginning to invest beyond standalone products in paid guidance and ongoing support. India-based platforms now offer membership and coaching models that combine fitness, nutrition, habit tracking, and expert support. FITTR[25] and Habuild[26] illustrate the emergence of service-led wellness propositions that combine content, coaching, and continuous engagement. While these examples do not indicate the size of India's paid wellness market, they highlight a broader shift towards connected, outcome-oriented wellness models that support consumers beyond the point of purchase.

Value for money and clear product information are central to wellness purchases

Value and transparency remain central to health and wellness purchasing decisions. Consumers increasingly expect clear product information, credible claims, and reassurance around sustainability, data security, and support. Brands that treat these attributes as part of the core value proposition, rather than supplementary features, will be better positioned to build trust and encourage longer-term engagement.

What this means for consumers and businesses

Brands must reduce the friction between strong wellness aspirations and consumers' ability to act on them consistently. Value-led portfolios, clear product information, and convenient functional formats can make wellness easier to understand, afford, and sustain. Credible sustainability practices, data safeguards, and accessible support will also be important in building trust and longer-term engagement.



25 FITTR, Introducing Healthcare 3.0 (accessed as of 29 September 2026)

26 Habuild, The Easiest Way to Start a Healthier Life (accessed as of 29 September 2026)

(5) Different expectations of value are shaping India's health demand

Our survey provides another lens on India's health and wellness market. Based on a cluster analysis of global consumers' behaviours, attitudes, and interest in future-oriented wellness offerings, five proprietary archetypes were identified and applied to Indian consumers. Together, these archetypes reveal distinct sources of demand and different pathways for growth across the sector.

The archetypes reveal that while Indian consumers value health, they differ on how they expect value to be created and delivered. Some seek measurable outcomes and expert-backed guidance, while others prioritise value, community participation, or simplicity.

1. **Data-driven optimisers (29%[27]):** They are performance-driven consumers who seek to measure, track, and optimise their health through data, technology, and expert-backed solutions. Their interest is considerably higher than the global average across categories such as nutrition, diagnostics, wearables, and behaviour-change programmes (e.g. 73% qualified buyers for nutrition vs global average of 57%; 55% for wearables versus global average of 25%). As a result, they display a greater preference for technology-enabled health management and visible outcomes.
2. **Value-seeking optimisers (21%):** This archetype includes pragmatic consumers who engage in wellness when they see a clear financial or functional return on investment. Their particularly strong interest in incentives, insurance, and financial programmes (55% qualified buyers vs global average of 18%) reflects their focus on tangible value. They also show comparatively higher interest in wellness experiences, health insights, and diagnostics, especially when the benefits are clear.
3. **Social wellness seekers (19%):** They are community-oriented, experience-led consumers who view wellness as a shared journey shaped by connection, culture, and belonging. Their strong demand for social, community, and personal-growth offerings (53% qualified buyers vs global average of 21%), as well as experience, retreats, and travel (38% vs 20%), reflect this preference. Lower interest in wearables suggests that individual tracking may be less compelling unless it enables shared experiences, community participation, or peer support.
4. **Holistic harmonisers (13%):** This group consists of consumers who prioritise balance, their environment, and emotional wellbeing through lifestyle and sensory wellness. Their greater demand for lifestyle, environmental, and sensory tools (65% qualified buyers vs global average of 29%), as well as devices and smart environments (48% vs 30%), reflects an inclination towards solutions embedded in everyday surroundings rather than structured coaching or experiential wellness journeys.
5. **Low-engagement consumers (19%):** They are consumers who prioritise simplicity, affordability, and trust, and are cautious of emerging wellness trends and technologies. This group skews towards older consumers who are less financially secure. They are also less willing to share personal health data.

The first four archetypes tend to include younger, more financially secure consumers who are more engaged with health technology, more willing to share data for personalisation, and more concerned about external influences on their wellbeing. Nutrition, supplements, and personal care attract a high share of qualified buyers across these archetypes.

27 PwC, Voice of the Consumer 2026, Consumer Archetypes (percentage of Indian respondents)

The practical value of the archetypes is that they help businesses identify where growth may come from, whether by finding new customers for existing products, extending into adjacent services, or building partnerships around emerging wellness behaviours. HealthifyMe,[28] an Indian health and wellness platform, illustrates this route through a proposition built around nutrition coaching and measurable improvement. Its core customer is likely to be the data-driven optimiser, someone who values nutrition guidance, coaching, tracking, and visible progress. The same platform can stretch towards value-seeking optimisers by offering clearly differentiated plans and demonstrating what each option delivers.

A similar expansion opportunity exists in smart wearables. Ultrahuman's[29] focus on sleep, recovery, and metabolic metrics aligns closely with data-driven optimisers. More accessibly priced smartwatch brands such as boAt[30] and Noise[31] can also reach value-seeking optimisers when they connect affordable devices with useful fitness insights.

The lens is equally useful beyond technology. In the food and beverage segment, Dabur India[32] can appeal to holistic harmonisers through Ayurvedic and natural products that fit routine-based wellness, while familiar products, access, and clear benefits can attract value-seeking optimisers. In personal care, Hindustan Unilever[33] can use its range across price points to address value-seeking optimisers while linking daily care to wider wellbeing for holistic harmonisers. L'Oréal India[34] can engage data-driven optimisers through evidence of measurable beauty outcomes and extend towards holistic harmonisers by connecting beauty routines with broader wellbeing.

The same logic applies to GLP-1 therapies. Eli Lilly's Mounjaro[35] and Novo Nordisk's Ozempic[36] would be more relevant to data-driven optimisers when clinician-led care is supported by trackable outcomes, while clear pathways and benefits can strengthen relevance for value-seeking optimisers. Generic semaglutide development by Dr. Reddy's Laboratories Ltd. (under the brand name Obeda)[37] illustrates how affordability and access may broaden the market, with evidence and regular progress tracking helping retain the confidence of data-driven consumers.

The archetypes show that India's health and wellness market is not one market, but a set of distinct demand pools. Competitive advantage will come from choosing which consumers to serve, tailoring how value is delivered, and expanding selectively into adjacent opportunities.

28 Healthify, Meet Healthify. Health Made Easy With AI.(accessed as of 29 September 2026)
29 Ultrahuman (accessed as of 29 September 2026)
30 Boat, Smartwatches (accessed as of 29 September 2026)
31 Noise, Smart-watches (accessed as of 29 September 2026)
32 Dabur, Our Global Brand Portfolio (accessed as of 29 September 2026)
33 Hindustan Unilever Limited, Brands (accessed as of 29 September 2026)
34 L'Oréal, India (accessed as of 29 September 2026)
35 Eli Lilly, Mounjaro® (accessed as of 7 October 2026)
36 Novo Nordisk, Ozempic® - semaglutide (accessed as of 29 September 2026)
37 Dr. Reddy's.API, About Semaglutide API (accessed as of 29 September 2026);
JM Financial, Dr Reddy's launches Obeda® (semaglutide) in India for Type 2 Diabetes (accessed as of 29 September 2026)

03 Opportunities for your business

We asked consumers which products and services they would consider purchasing in the future to support their health and wellness goals. The findings point to demand forming across nutrition and supplements, personalised insights and diagnostics, behaviour-change support, smart health devices, and wellness experiences. This chapter translates these signals into a sector-specific view, highlighting where food and beverage companies, personal care businesses, health industry, and apparel industry players can credibly innovate, partner, and compete, and the no-regret moves they can make now to capture emerging growth.

Food and beverage companies

Indian consumers are showing interest in nutrition products linked to clearer outcomes. Our survey shows interest among Indian consumers is stronger than the global average in longevity-focused foods such as high-protein and gut-health propositions as well as nutrition supporting skin, hair, cognition, and mood.

Functional nutrition is moving from niche wellness propositions into everyday food and beverage categories. Competitive advantage will depend on reformulating trusted products, substantiating claims and making targeted benefits easy to understand.

Public-health initiatives such as Eat Right India[38] and digital channels are helping make healthier choices more visible and accessible. However, long-term growth will depend on embedding improved nutrition into familiar, affordable formats that fit everyday occasions.



Growth opportunities in food and beverage

Reinvent everyday products for functional benefits:

- Improve nutritional profiles through reformulation and portion choices.
- Add protein, fibre, and micronutrients—or reduce sugar—in familiar categories.
- Support functional benefits with clear, substantiated claims.

Extend products into connected nutrition services

- Link selected products with personalised guidance, meal planning, and progress tracking.
- Use partnerships to add nutrition, behaviour change, and digital capabilities.

38 FSSAI, Eat Right India (accessed as of 29 September 2026)

Win priority occasions and channels:

- Target high-frequency occasions such as breakfast, workday nutrition, and healthier snacking.
- Test propositions through e-commerce and quick commerce before expanding distribution.
- Use channel data to refine pricing, formats, and assortment.

No-regret moves:

- Create cross-functional governance to validate nutritional benefits, claims, and consumer communication before launch.
- Build rapid test-and-learn capabilities that connect product development, channel data, and repeat-purchase evidence.
- Define which nutrition, digital, and behaviour-change capabilities to build internally and where partnerships can accelerate scale.

Personal care

India's beauty market is shifting towards efficacy, ingredient transparency, and solutions tailored to specific needs.[39] Science-led brands such as Minimalist, Justhuman, and Kama Ayurveda illustrate the commercial potential of this positioning.[40] Indian consumers' greater comfort than the global average with AI-enabled guidance and data sharing creates a further opportunity: trusted, personalised beauty experiences built on explicit consent, clear purpose, and appropriate safeguards.

The next phase of growth will come from the convergence of beauty and wellbeing. Indian consumers show stronger purchase interest than the global average in beauty-from-within products, advanced skincare, and scalp-diagnostic solutions. For personal care businesses, this creates scope to move beyond standalone products towards evidence-led routines that combine formulations, guidance, and selected services.



Growth opportunities in personal care

Science-backed and personalised beauty:

- Target advanced skincare, healthy ageing, and diagnostic-led scalp care.
- Use consented data to enable relevant AI-supported recommendations.

Clean-label beauty rooted in Indian wellness:

- Lead with transparent ingredients, clear labelling, and substantiated claims.
- Blend Indian wellness traditions, including Ayurveda, with modern formulation science.
- Design for local skin, hair, climate, and affordability needs.

39 MSN, The State of Clean Beauty in India and What's Still Missing (accessed as of 8 October 2026)

40 Minimalist, About us (accessed as of 29 September 2026);
Justhuman, Clean beauty (accessed as of 8 October 2026);
Kama Ayurveda, About us (accessed as of 8 October 2026)

Beauty integrated with broader wellbeing:

- Build beauty-from-within propositions around nutrition and healthy ageing.
- Explore sleep- and stress-related beauty needs as emerging adjacencies.
- Extend products into guided routines and selected services.

No-regret moves:

- Treat daily beauty routines as connected journeys across products, advice, and follow-up, not isolated purchase occasions.
- Use skin and scalp diagnostics with AI-enabled guidance to provide clear recommendations without adding friction or unnecessary complexity.
- Test propositions, formats, and channels before scaling, with substantiated claims, explicit consent, and safeguards built in from the outset.

Health industries

India's consumer-facing innovation has been led largely by specialist platforms in fitness, nutrition, mental wellness, and at-home diagnostics rather than integrated provider systems. Although hospitals and private providers are building digital pathways, uneven adoption of common standards leaves many consumers navigating disconnected wellness, diagnostic, and clinical services. The opportunity is to turn this digital readiness into clinically useful, actionable care.

The Ayushman Bharat Digital Mission (ABDM)[41] provides a route to greater integration through an open, interoperable ecosystem for accessing and sharing health records. Capturing value will depend on embedding ABDM's interoperability and health-data exchange standards into clinical workflows and enabling secure information sharing across providers, diagnostics, insurers, and wellness platforms. This can help improve care coordination and continuity by making relevant health information more accessible across the ecosystem.



Growth opportunities in health industries

Make fragmented health data actionable:

- Convert wearable, app, diagnostic, and screening data into prioritised insights for consumers and clinicians.
- Validate insights for reliability, explainability, and appropriate use.

Orchestrate AI-enabled care journeys:

- Use AI for navigation, triage, education, and follow-up, with professional oversight.
- Create seamless routes from digital enquiry to virtual or in-person care.

41 National Health Authority, Ayushman Bharat Digital Mission (accessed as of 29 September 2026)

Extend prevention beyond hospital systems:

- Combine screening, home-based testing, monitoring, and guidance around priority risks.
- Build connected pathways across clinical providers and independent wellness platforms.

No-regret moves:

- Prioritise journeys where integration can measurably improve access, outcomes, or continuity.
- Define consent, accountability, and escalation rules before launch.
- Establish the data standards, workflows, and partnerships required for delivery across the health ecosystem.

Apparel industry

A growing focus on health, wellness, and preventive living is beginning to influence how Indian consumers think about appearance, confidence, and self-expression. Rising interest in weight management, improved nutrition, and healthier lifestyles, including increasing adoption of GLP-1 therapies, is creating new opportunities for apparel retailers to engage consumers whose preferences and needs may evolve over time. Indian GLP-1 users already report increased spending on personal appearance, while broader wellness trends are contributing to continued growth in activewear and lifestyle-oriented apparel categories.

Although apparel-specific effects of GLP-1 adoption are still emerging in India, evidence from more mature markets suggests that weight-loss interventions can influence wardrobe refresh cycles, fit preferences, and clothing purchases. For Indian retailers, the opportunity is not simply to respond to changing size requirements, but to recognise that health and wellness journeys increasingly shape how consumers present themselves and the products they choose to buy. As wellness becomes a more prominent part of consumer identity, apparel brands can play a broader role in supporting confidence, lifestyle aspirations, and self-expression.



Growth opportunities in the apparel industry

Align assortments with evolving consumer lifestyles:

- Increase focus on categories linked to wellness, fitness, comfort, and active living.
- Monitor how evolving health and wellness behaviours influence product preferences, purchasing occasions, and wardrobe needs.

Clean-label beauty rooted in Indian wellness:

- Position products around confidence, mobility, self-expression, and personal wellbeing.
- Connect apparel offerings to broader lifestyle aspirations rather than fashion trends alone.

Strengthen personalisation and customer experiences:

- Use customer insights and digital engagement tools to anticipate evolving wardrobe needs.
- Enhance fit guidance, styling support, and personalised recommendations across channels.

Build ecosystems around health and wellbeing:

- Explore partnerships with fitness, wellness, and lifestyle brands to create integrated consumer experiences.
- Develop loyalty and engagement programmes that reinforce long-term customer relationships.

No-regret moves:

- Build greater flexibility into merchandising and inventory planning processes.
- Invest in customer data and personalisation capabilities to identify evolving lifestyle and purchasing patterns.
- Develop propositions that connect apparel with broader wellness, confidence, and self-improvement goals.



04 About the study

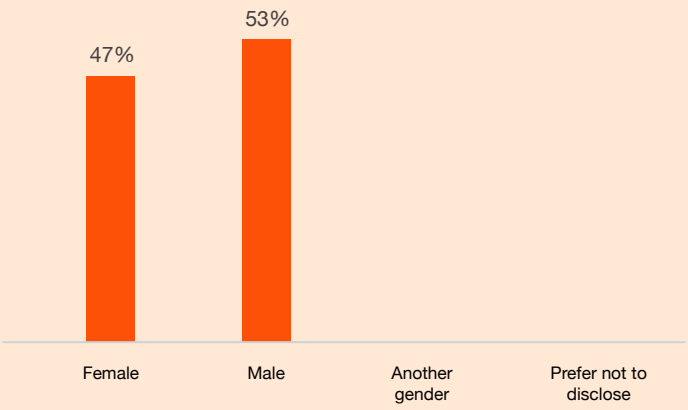
In February and March 2026, PwC surveyed 21,808 consumers across 27 countries and territories: Australia; Brazil; China; Egypt; France; Germany; Hong Kong, SAR; Hungary; India; Indonesia; Ireland; Malaysia; Mexico; the Netherlands; the Philippines; Poland; Qatar; Romania; Saudi Arabia; Singapore; Spain; Thailand; the United Arab Emirates; Ukraine; the United Kingdom; the United States; and Vietnam. The respondents were at least 18 years old and were asked about a range of topics relating to consumer health and wellness, including their behaviours and habits, tech/AI engagement, GLP-1 usage, health goals, and wellness-related products.

Interviews with industry executives took place in April and May 2026.

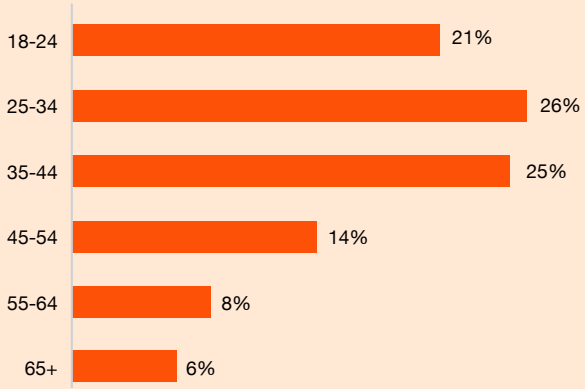
The survey of 1,005 Indian consumers included different age groups and represented working and non-working populations.

Representation across key demographic (Source: PwC's Voice of the Consumer Survey 2026)

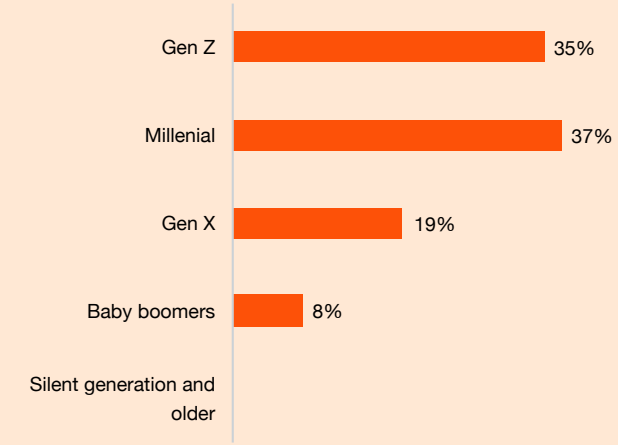
Gender
(Base: 1,005)



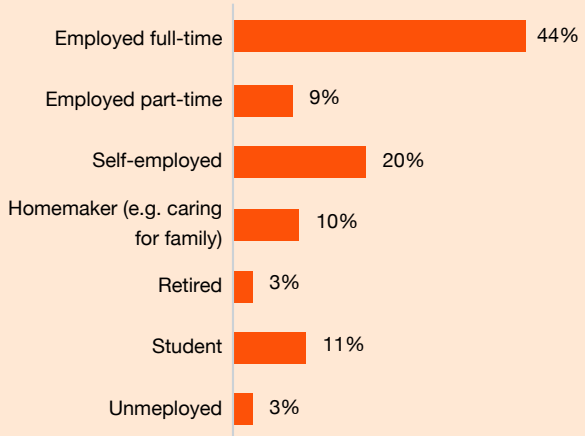
Age
(Base: 1,005)



Generation
(Base: 1,005)



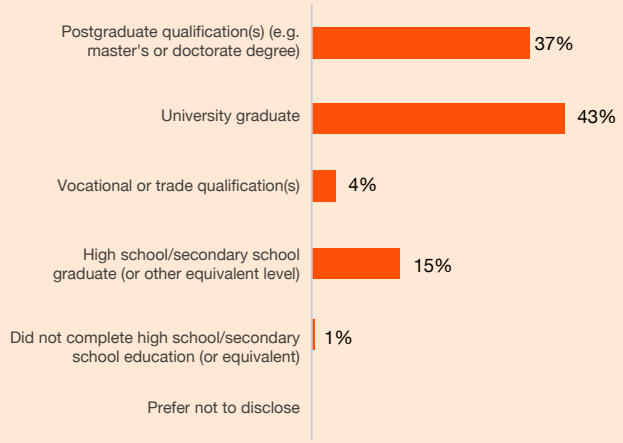
Employment
(Base: 1,005)



Educational and financial profile

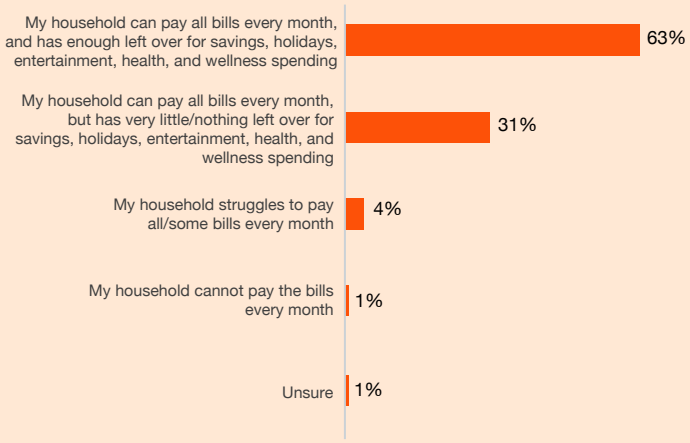
Educational profile

(Base: 1,005)



Financial profile

(Base: 1,005)



1,005 consumer responses from all over India covering 15 states and 2 union territories

Agartala 2	Kolkata 105
Ahmedabad 27	Meerut 4
Bengaluru 131	Mumbai 166
Bhubaneshwar 13	Bhubaneshwar 13
Chandigarh 18	Nagpur 14
Chennai 42	Patna 22
Delhi NCR 201	Pune 48
Dhanbad 5	Rajkot 1
Guwahati 32	Ranchi 19
Hyderabad 64	Salem 1
Imphal 3	Shillong 4
Jaipur 25	Siliguri 3
Jalandhar 7	Udaipur 5
Kochi 28	Visakhapatnam 11
Kolhapur 4	



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