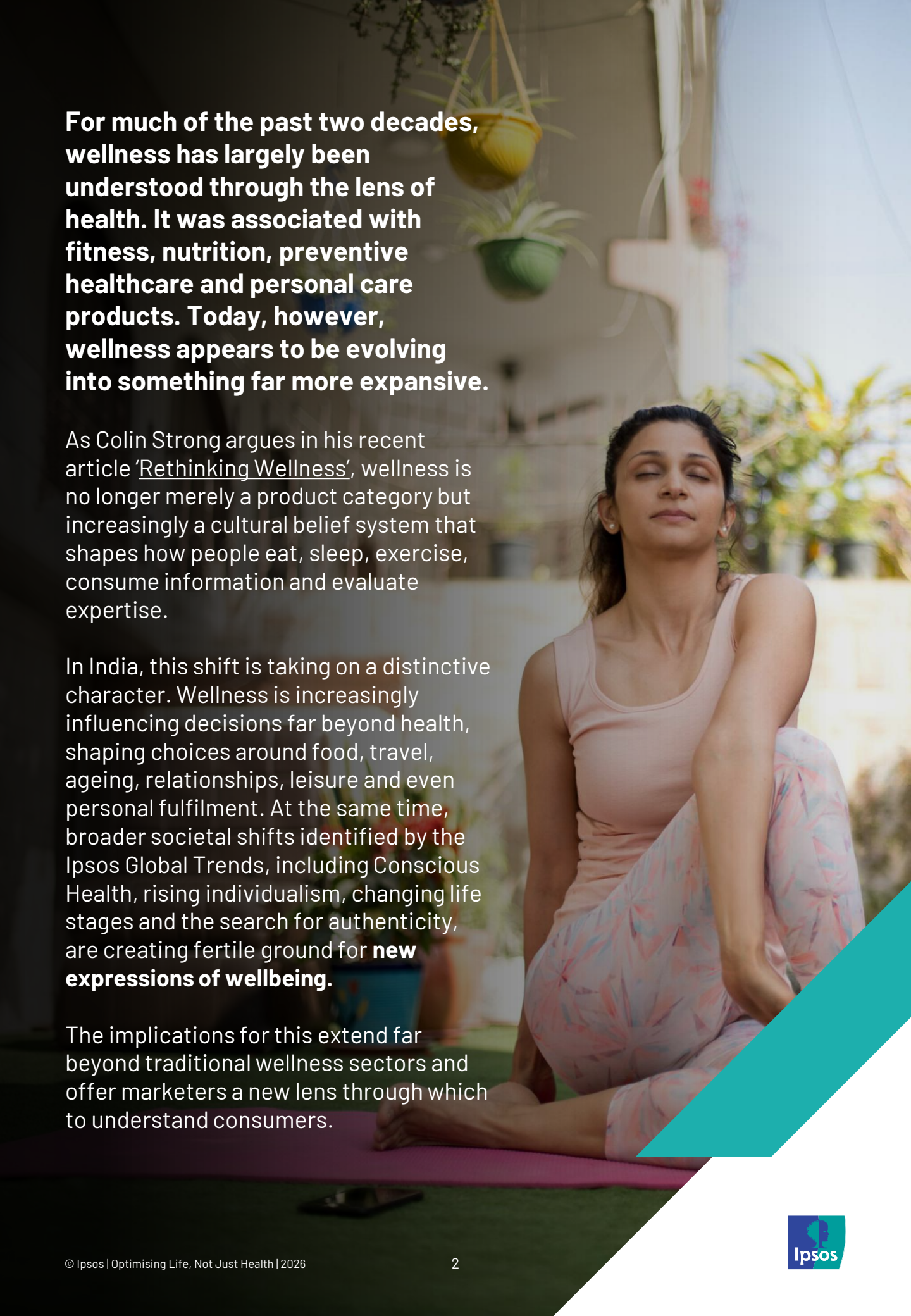
OPTIMISING LIFE, NOT JUST HEALTH

Why brands in India are increasingly competing on life outcomes, not product benefits.



November 2026

© Ipsos | Optimising Life, Not Just Health | 2026



For much of the past two decades, wellness has largely been understood through the lens of health. It was associated with fitness, nutrition, preventive healthcare and personal care products. Today, however, wellness appears to be evolving into something far more expansive.

As Colin Strong argues in his recent article 'Rethinking Wellness', wellness is no longer merely a product category but increasingly a cultural belief system that shapes how people eat, sleep, exercise, consume information and evaluate expertise.

In India, this shift is taking on a distinctive character. Wellness is increasingly influencing decisions far beyond health, shaping choices around food, travel, ageing, relationships, leisure and even personal fulfilment. At the same time, broader societal shifts identified by the Ipsos Global Trends, including Conscious Health, rising individualism, changing life stages and the search for authenticity, are creating fertile ground for **new expressions of wellbeing.**

The implications for this extend far beyond traditional wellness sectors and offer marketers a new lens through which to understand consumers.

Wellness is Expanding from Prevention to Optimisation

The evolution of wellness can be understood through three broad stages.

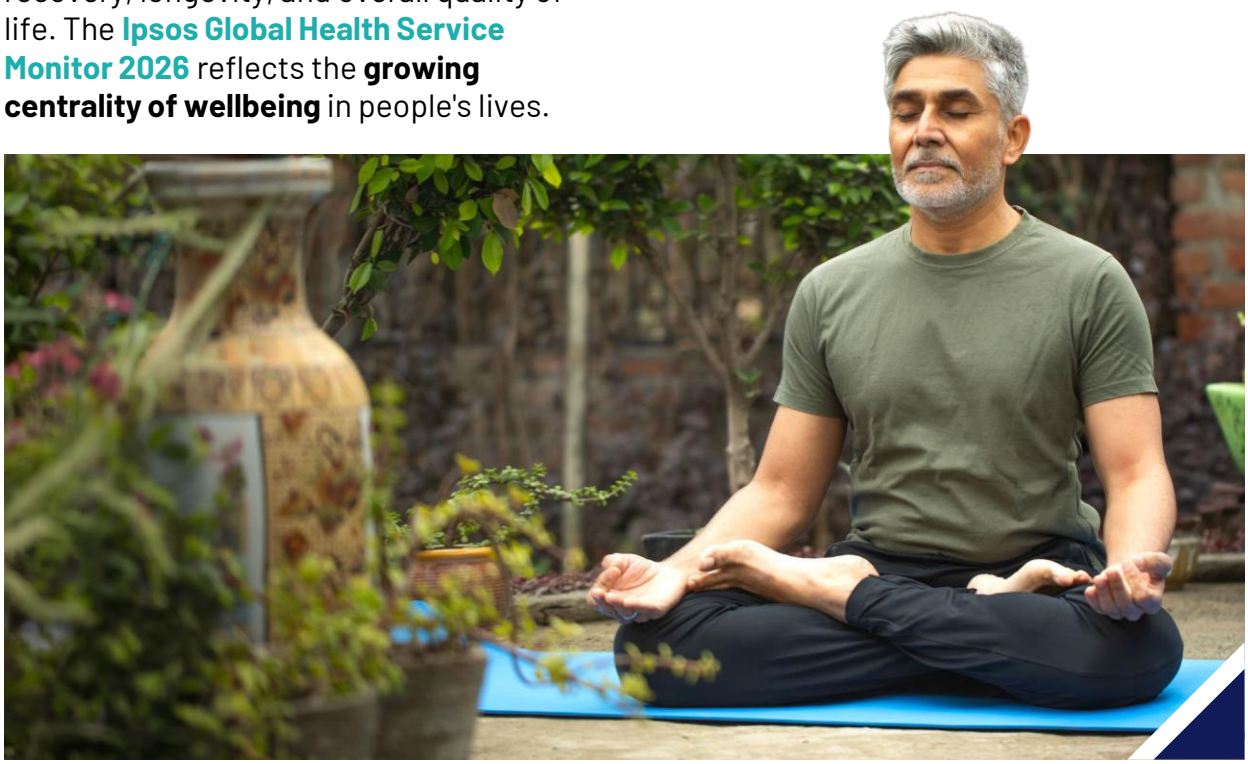
For a very long time, health was primarily curative. Consumers engaged with healthcare when something went wrong. The next phase was preventive, which got a boost during and post-COVID, when people started adopting healthier lifestyles to avoid future illness.

Now, a third stage is emerging: **optimisation.**

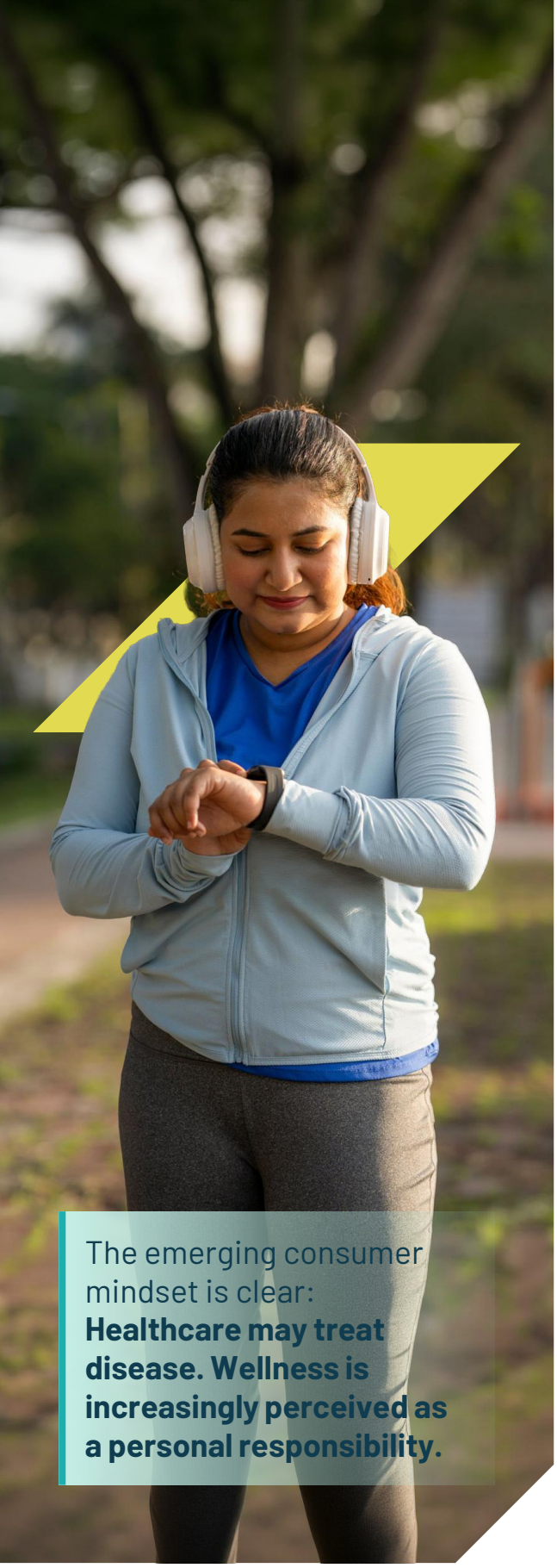
Consumers' goals are increasingly shifting towards maximising energy, resilience, recovery, longevity, and overall quality of life. The **Ipsos Global Health Service Monitor 2026** reflects the **growing centrality of wellbeing** in people's lives.

Eight in ten urban Indians (81%) say they frequently think about their physical wellbeing, while 76% say they frequently think about their mental wellbeing.

This shift aligns closely with **Conscious Health**, one of the strongest and most enduring trends identified in Ipsos Global Trends. What started as a focus on prevention is increasingly evolving into a quest for optimisation. As per the trend, wellbeing becomes a continuous pursuit rather than a reactive response to illness. As a result, the wellness horizon itself is expanding to encompass sleep quality, healthy ageing, cognitive performance, metabolic health, emotional resilience and vitality.



> The question is no longer simply, "How do I stay healthy?" Increasingly, it is, *"How do I get more out of life?"*



The emerging consumer mindset is clear: **Healthcare may treat disease. Wellness is increasingly perceived as a personal responsibility.**

Wellness is Becoming a Personal Responsibility

If optimisation is the new goal, personal responsibility is increasingly seen as the route to achieving it.

The Ipsos Health Service Monitor reveals that 70% of urban Indians agree that people often make health decisions independently rather than consulting a doctor, while 66% agree that information about looking after one's health is readily available when needed.

More importantly, these findings point to a shift in **agency.** Consumers increasingly see themselves not simply as patients, but as active participants in their own wellbeing. They are drawing on digital health platforms, wellness communities, creators, trackers, wearables and online experts alongside traditional healthcare systems.

This mirrors observations in Colin Strong's work, which highlights wellness culture's growing emphasis on personal control and sovereignty over health decisions. Globally, 78% of people say they want greater control over their health decisions. This is not necessarily a rejection of medical expertise. Rather, it reflects a growing belief that wellbeing requires a broader, more continuous effort than healthcare systems alone can provide.

Brands such as **Ultrahuman, HealthifyMe** and **GOQii** are thriving because they enable consumers to monitor, personalise and optimise wellbeing rather than simply manage illness.

Wellness is Becoming Deeply Personal

One of the defining characteristics of the emerging wellness landscape is personalisation.

Ipsos' PoV 'The Shift and the Stretch' highlights how life stages are becoming less standardised. Marriage and parenthood are occurring later, careers are taking precedence for longer, and consumers are spending extended periods focused on self-development and personal aspirations.

As life paths diversify, so too do wellness journeys.

Consumers increasingly have the time and opportunity to construct highly personalised approaches to wellbeing based on their own priorities, aspirations and life circumstances.

Within the same household:

- One individual may focus on fitness and performance.
- Another may prioritise sleep.
- A third may pursue healthy ageing.
- Someone else may focus on mindfulness, recovery or nutrition.

The traditional notion of a shared approach to health is giving way to multiple individual wellness journeys. This reflects a broader movement towards personal agency and self-expression, identified as **Escape to Individualism**, the second trend evident in the wellness space for urban Indians in the Ipsos Global Trends. Wellness is becoming less prescriptive and more self-authored.

> The future of wellness may not be defined by one ideal model of healthy living, but by millions of personalised versions of what it means to live well.



Wellness is Rediscovering Old Wisdom Through a Modern Lens

One of the most intriguing aspects of today's wellness culture is that innovation is not always pointing consumers towards something new. Often, it is leading them back to something familiar.

Across categories, many are rediscovering practices that previous generations often regarded as common sense:



Sleeping earlier



Eating local and seasonal foods



Walking regularly



Consuming traditional ingredients



Following natural eating rhythms



Incorporating mindful routines

What has changed is the **framing.** Practices once viewed as tradition are increasingly being validated through modern science. Research on circadian rhythms is renewing interest in sleep timing, reinforcing wisdom that has long existed within Indian traditions around aligning daily routines with natural rhythms. Microbiome science is fuelling conversations around fermented foods, such as yoghurt, kanji, fermented rice water and other products prepared in households across India. Interest in minimally processed nutrition is prompting consumers to revisit ingredients such as ghee and traditional grains straight from the farm, with some brands offering 'unpolished' staples such as lentils and rice.

This creates an interesting paradox: while consumers have access to unprecedented technology and information, many are looking backwards as much as forwards for wellbeing solutions.

> Increasingly, the future of wellness appears to be as much about rediscovery as reinvention.



Wellness, now an Identity and Self-Expression

Wellness is increasingly extending beyond functional health benefits to encompass lifestyle signals.

The Ipsos report, Gen Z and the Plant-Powered Plate: Trends and Insights, highlights how food is no longer simply nourishment but a lifestyle signal shaped by health aspirations, sustainability concerns, ethical values, and digital influence. The report further notes that health has become a lifestyle commitment, while protein has emerged as a "lifestyle currency" for many younger consumers.

For younger consumers in particular, wellness increasingly functions as a form of self-expression, allowing them to communicate not only how they want to live, but who they aspire to be. Food choices increasingly signal beliefs about:

- **Health**
- **Sustainability**
- **Authenticity**
- **Responsibility**

Similarly, the growing visibility of running clubs, HYROX, cycling communities, pickleball groups, wellness retreats and active travel experiences suggests that wellbeing is becoming intertwined with social belonging and identity.

People are not simply adopting healthier habits but are increasingly **expressing values** through them.

Brands such as **The Whole Truth, Yoga Bar** and emerging plant-based players are responding by positioning around transparency, ingredient integrity and values-led consumption rather than nutrition alone.



Wellness is Escaping Wellness Categories

Perhaps the strongest evidence that wellness is becoming a broader cultural force is its growing influence across categories traditionally unrelated to health.

Consumers increasingly evaluate products and services through a wellbeing lens.

As a result, brands are shifting from selling features to enabling life outcomes.

The Westin ad (launched in Aug 2026) about sleep currently running across OTT and digital platforms is titled "Own Your Mornings". The film contrasts soft visuals of everyday morning routines with a hard-hitting voiceover, presenting otherwise ordinary moments as feats powered by a good night's sleep (check out more here).

A similar pattern is visible elsewhere:



Beauty brands increasingly talk about skin health rather than appearance alone.



Financial institutions discuss financial wellbeing and peace of mind.



Travel providers are creating restorative and wellness-focused experiences.



Food brands are emphasising transparency, functionality and ingredient quality.

Across categories, many are increasingly asking not only:
"What does this product do?"

but also:
"How does this help me live better?"

What This Means for Marketers

The emerging challenge for marketers is that there is no longer a single wellness consumer. Different consumers are pursuing different outcomes, drawing on different sources of information and defining wellbeing in different ways.

The opportunity lies not in targeting "wellness" broadly, but in understanding the specific role a brand can play within an increasingly individualised wellness landscape.

The Ipsos Individualised Wellness Framework

As wellbeing becomes more personal, consumers are constructing wellness systems around five broad needs:



OPTIMISE

Help me become better.

Consumers seek energy, performance, resilience, longevity and recovery.
Examples: Ultrahuman, HealthifyMe, Fast&Up.



PERSONALISE

Help me do it my way.

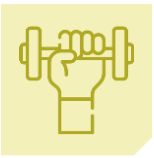
Consumers seek choice, self-direction, personal control and tailored solutions.
Examples: GOQii, personalised wellness and nutrition platforms.



RECONNECT

Help me return to what matters.

Consumers seek authenticity, better sleep, balance, nature and simpler routines.
Examples: Westin Hotels, Ananda in the Himalayas, Atmantan Wellness Centre.



EXPRESS

Help me show who I am.

Consumers seek identity, values, community and self-expression.
Examples: The Whole Truth, Yoga Bar, plant-based brands, and brands which built communities.



FLOURISH

Help me live better.

Consumers seek quality of life, fulfilment, confidence and peace of mind.
Examples: wellness tourism brands, financial wellbeing propositions and lifestyle platforms.



Three Questions Every Marketer Should Ask

1. Which wellness outcome do we enable?

Consumers increasingly buy outcomes, not products.
The most compelling brands help consumers sleep better, age better, recover better, feel better or live better.

2. Which wellness territory do we own?

Few brands can credibly address every wellness need.
The opportunity lies in identifying whether your brand helps consumers Optimise, Personalise, Reconnect, Express or Flourish, and then building a clear proposition around that role.

3. Are we simplifying or adding complexity?

Consumers face an overwhelming volume of information from healthcare professionals, influencers, communities, platforms and AI-powered tools.
Brands that act as guides, helping consumers navigate choices with greater confidence, may ultimately earn more trust than those that simply make claims.

A Future that Makes us Think Beyond Simply Wellness

Perhaps the most important implication of this shift is that wellness is no longer confined to wellness categories. When consumers begin evaluating choices through the lens of better sleep, greater vitality, stronger relationships, peace of mind or healthy ageing, every category becomes part of the wellbeing ecosystem.

The implication is profound: the next wave of competition may not be between brands offering similar products, but between brands helping consumers achieve similar life outcomes.

For marketers, the challenge is no longer to understand whether consumers care about wellness. It is to understand which version of wellness they are pursuing, and the role their brand can play in helping them achieve it.

> The future of wellness may not be about helping consumers live longer. It may be about helping them live better.



How Ipsos Can Help

As wellness expands beyond health and into broader questions of lifestyle, identity and quality of life, understanding consumer motivations requires more than traditional category research.

At Ipsos, we combine proprietary data, cultural intelligence and behavioural expertise to help organisations understand:

- How definitions of wellness are evolving across consumer segments
- Which wellness territories their brands can credibly own
- Emerging opportunities in innovation, portfolio development and brand positioning
- The role of life stages, aspirations and cultural shifts in shaping wellbeing behaviours
- How evolving wellness expectations are changing decision-making across categories

Whether you are building a wellness proposition, identifying future growth opportunities, or understanding how wellbeing is reshaping your category, our experts can help uncover the tensions, motivations and emerging needs that will define the next wave of consumer growth.

To discuss what wellness means for your category, get in touch with your Ipsos account lead or write to the author directly.

Author:

Pallavi Mathur Lal

Marketing and Knowledge Lead

Ipsos India

Pallavi.MathurLal@ipsos.com

References



Ipsos Health Services Report 2026

https://www.ipsos.com/en-in/ipsos-health-service-report-2026



Ipsos Global Trends 2026

https://www.ipsos.com/en/ipsos-global-trends-10th-edition



The Shift and the Stretch

https://www.ipsos.com/en-in/shift-and-stretch



Rethinking Wellness

https://www.ipsos.com/en-vn/rethinking-wellness-product-category-cultural-belief-system



Westin ad

https://www.marketing-interactive.com/westin-turns-a-good-nights-sleep-into-a-power-move

© Ipsos | Optimising Life, Not Just Health | 2026