



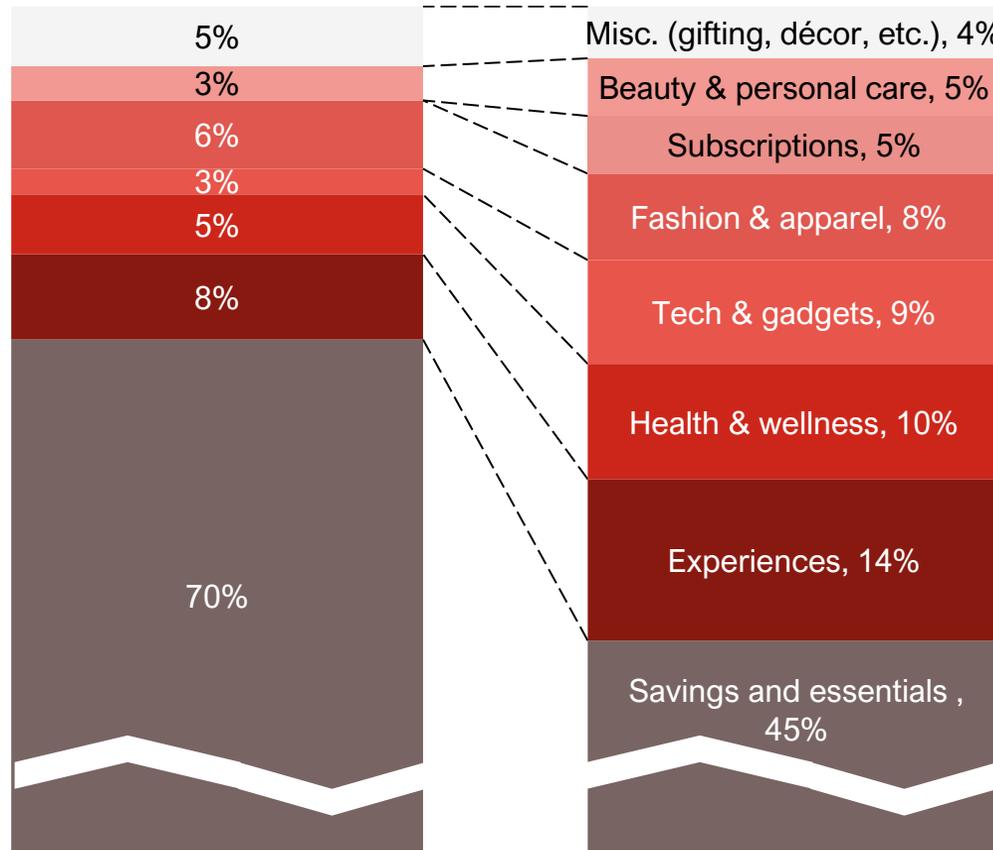
# Consumer Health & Lifestyle: Personalization, Performance & Purpose

Post panel report



# We saw how consumerism in India is evolving...

Shift in spending across generations  
(%, FY25)



## What is evolving?

- Misc spends-**gifting, décor, and small indulgences**-are rising among consumers
- Ingredient-led **skincare and authentic brands** are driving beauty choices
- Subscriptions across **entertainment and work/learning tools** are growing fast
- Driven by **trend-led, occasion-based**, and fast-turnover purchases
- **Adoption of smart devices, wearables, and emerging tech (VR, smart glasses)** is accelerating, led by younger cohorts
- **Preventive health is rising**, led by a growing focus on mental well-being and stress management
- **Rising spend on dining, travel, and events** is split by mindset - Millennials plan, Gen Z acts spontaneously
- Share of spend on savings, investments, rent, utilities, etc. has reduced, as **younger cohorts reallocate toward lifestyle and experiences**

Gen X

Gen Z and millennials

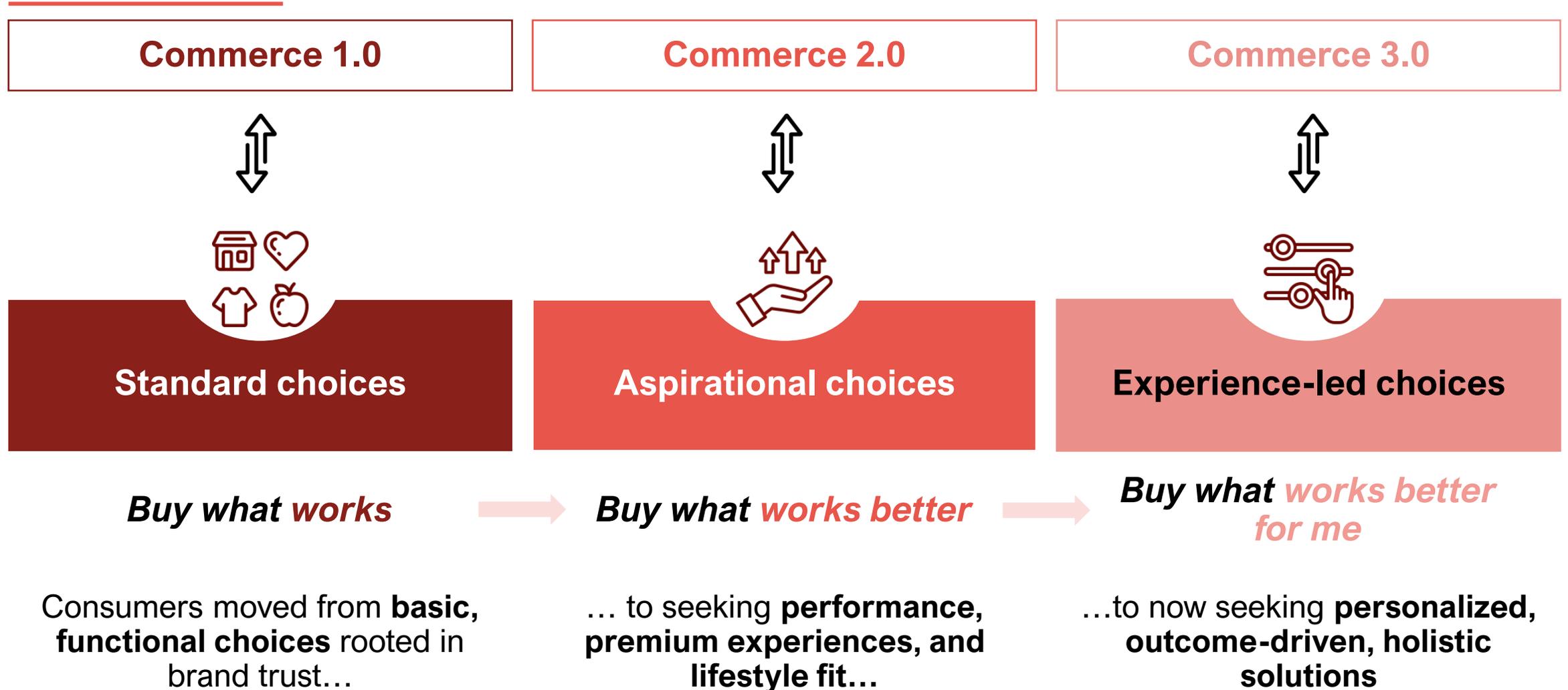
Note(s): Experiences include travel, dining, concerts, etc., Savings and essentials include investments, rent, utilities, etc., Miscellaneous expenses include gifting, education and upskilling, décor, etc.  
Source(s): Gen Z and millennial conversations, Praxis analysis

# Welcome Millennials and Gen Z: Drivers of this sentiment shift!

	 <b>Baby boomers</b> (1946 – 64)	 <b>Gen X</b> (1965 – 80)	 <b>Millennials</b> (1981 – 96)	 <b>Gen Z</b> (1997 – 2009)	 <b>Gen Alpha</b> (2010 – 25)	 <b>Gen Beta</b> (2026 onwards)
Age group	60+	45 – 60	29 – 44	16 – 28	<16	
India's context at early age	<ul style="list-style-type: none"> <li>Independence &amp; socialism, one-brand world</li> </ul>	<ul style="list-style-type: none"> <li>Doordarshan era, limited choices</li> </ul>	<ul style="list-style-type: none"> <li>Liberalization, mall boom, brand explosion</li> </ul>	<ul style="list-style-type: none"> <li>Social media age, choice overload</li> </ul>	<ul style="list-style-type: none"> <li>Pandemic-born, curated brand exposure</li> </ul>	
Belief system	<ul style="list-style-type: none"> <li>Duty-first</li> </ul>	<ul style="list-style-type: none"> <li>Low-key grounded</li> </ul>	<ul style="list-style-type: none"> <li>Do-your-own thing</li> </ul>	<ul style="list-style-type: none"> <li>Purpose-driven and self-expressive</li> </ul>		
Traits	<ul style="list-style-type: none"> <li>Disciplined &amp; conservative</li> </ul>	<ul style="list-style-type: none"> <li>Resilient &amp; practical</li> </ul>	<ul style="list-style-type: none"> <li>Adaptive &amp; self-reliant</li> </ul>	<ul style="list-style-type: none"> <li>Hyper-aware &amp; main character vibe</li> </ul>	<ul style="list-style-type: none"> <li>Fast, fearless, curious</li> </ul>	
Tech exposure	<ul style="list-style-type: none"> <li>Minimal, analog systems</li> </ul>	<ul style="list-style-type: none"> <li>Early tech adopters, PCs, TV</li> </ul>	<ul style="list-style-type: none"> <li>Digital transition, internet &amp; mobile</li> </ul>	<ul style="list-style-type: none"> <li>AI-aware, social media, apps, automation</li> </ul>	<ul style="list-style-type: none"> <li>AI-native, AR/VR, smart tech, robotics</li> </ul>	
Global exposure	<ul style="list-style-type: none"> <li>Limited, news-based</li> </ul>	<ul style="list-style-type: none"> <li>News based, brand aspirations</li> </ul>	<ul style="list-style-type: none"> <li>Global brands via internet</li> </ul>	<ul style="list-style-type: none"> <li>Social media-driven global brands connection</li> </ul>		

**To be born yet**

# With the onset of Commerce 3.0, underlying sentiments are also changing



# Re-defining India's consumer needs: 3Ps for the next generation of experience-led consumers



1

## Personalization

**Self-expression through brands**

*Consumers seek brands that **reflect their being** - using inclusivity to express authenticity, pride, and accomplishment*



2

## Performance

**Result-driven products, not pricey picks**

*Consumers today make every **rupee count** - prioritizing performance-led functional products that deliver value*



3

## Purpose

**Micro-activism (Buying with a cause)**

*Conscious consumerism is shaping choices, with shoppers favoring brands and products that **embody their values***

# Key takeaways

---

- 1 Strategic personalization from operational scale to clinical precision**  
Brands must enable efficient, scalable personalization for consumer products, while clinical categories require hyper-individualized interventions powered by real-time biometric data
- 2 Performance benchmarking anchored in dual success metrics**  
Measuring success now requires both hard quantitative outcomes (e.g., HbA1c reduction) and qualitative signals like confidence, emotional resonance, and purpose-led affinity that deepen loyalty and drive organic advocacy
- 3 Market penetration strengthened through vernacular and hyper-local relevance**  
Meaningful penetration beyond Tier 1 demands regionalized communication, localized product narratives, and formats that match cultural and functional expectations across diverse consumer segments
- 4 Product strategy that harmonizes instant utility with long-term benefits**  
Long-cycle categories must offer immediate functional or sensory value to boost early engagement while delivering deeper, long-term benefits that sustain adherence and therapeutic or functional outcomes
- 5 Financial steering centered on LTV-driven growth and retention quality**  
High-value subscription and repeat-purchase categories depend on maximizing LTV, strengthening retention cohorts, and using repurchase behavior as a key indicator of operational excellence

# 1 Strategic personalization from operational scale to clinical precision (evolving from mass functional products to hyper-personalization)



**Mass functional products**  
*Before 2005*

**Benefit-led performance products**  
*2005-2020*

**Hyper-personalized products**  
*2021 onwards*

**Standardized, one-size-fits-all product offerings** that deliver basic functional benefits

Growth of enhanced products delivering **targeted problem-solving** benefits like anti-dandruff, acne-control, etc.

Customized regimens built around **individual biology and clinical formulations**

## Sample brands



**Himalaya**  
SINCE 1930

**BOROLINE**  
PRODUCTS Since 1929



**Dove**

**head & shoulders**

**BIOTIQUE**  
ADVANCED AYURVEDA

**SKINKRAFT**  
LABORATORIES

**indē wild**  
**Minimalist**

<sup>BE</sup> Bodywise

**LUX**

**Pears**

**OLAY**

**GARNIER**

**FLOUT**

**WishCare**  
You Wish, We Care

**Chemist at Play**

# 2 Performance benchmarking anchored in dual success metrics (quantitative benchmarks and qualitative outcomes)

Quantitative benchmarks

## Biomarker-driven validation

Efficacy is now anchored to **measurable biomarkers**, shifting marketing toward proof-backed outcomes

Clinically Proven for best results

- 100% fell asleep within 15 mins
- 94% slept longer and deeper
- 190% increase in skin glow
- 93% reduction in stress

**Elevate Wellness, Amplify Life**

- 92% Reported enhanced energy levels in just 40 days\*
- 79% Increase in IMMUNE STRENGTH in 12 weeks\*\*
- 68% Experienced enhanced JOINT & EYE HEALTH 12 weeks\*\*
- 87% Improved VITAMIN AND MINERAL uptake by 12 weeks\*\*

\*Based on Clinical Trials by Independent Health Experts  
\*\*Based on Self-Reported User Experience Surveys

## Protocol & adherence tracking

**Adherence and behaviour tracking** (dosage, routines, consultation, etc.) allows brands to show real progress and build trust

Your order includes **FREE Consultation + Diet Plan!**

	<b>Chocolate / Results Pack</b> Pack of 1 (2lbs/907g)	MRP: ₹2,979 <b>₹2,699</b>
	<b>1 Month Consultation</b>	MRP: ₹999 <b>FREE</b>
	<b>Personalised Diet Plan</b>	MRP: ₹500 <b>FREE</b>

## Ingredient & formula efficacy benchmarks

**Active ingredients** are marketed with clinical benchmarks on concentration, purity, and validated performance

Ingredients that make it **unique.**

- Pure Niacinamide**  
Proven active that reduce excess oil & improve skin's barrier function.
- Matrimine**  
Reduces oil & appearance of enlarged pores.
- Zinc**  
Has anti-bacterial property that helps prevent acne.
- Acetyl Glucosamine**  
Even skin tone in combination with niacinamide.

**Skincare Infused with Ceramides**

Qualitative outcomes

## Emotional wellbeing & self-confidence uplift

Promoting **confidence, comfort, and emotional positivity** enables brands to communicate deeper impact

**BETTER SLEEP QUALITY WAKE UP FRESH**

BETTER MENTAL CLARITY & FOCUS FOR IMPROVED PRODUCTIVITY

**FROM TIRED TO FOCUSED**

- Improves Focus
- Boosts Stamina
- Protects Immunity

Clinically Proven  
Capsules in Canada Technology

Trusted by Thousands of Men  
888-5-5142 4943948

## Lifestyle enablement & activity readiness

Benefits that enable everyday activity shifts brands from **"problem solvers"** to **"life enablers"**

One Life... One Body... One Chance...  
Make your body Lean & Fit.

**WOMEN'S PROTEIN**

**Stay Strong Live Better**

Energy, Joints, Bones, Immune System, Muscles

**Alpha Labs VITAMIN B12 SUPPLEMENT**

## Value-based perception

Aligning with **consumer values** like sustainability, cruelty-free practices, and transparency builds purpose-led loyalty

We are & have always been a **cruelty-free brand!**

We do not test our final products or the ingredients on animals for hire a third party agency to do it to evaluate their safety & efficacy.

**What does Cruelty-Free mean?**

Although there's no legal definition for this term; at its core, cruelty-free means that the products are not tested on animals at any stage of their product development process.

**FORWARD THINKING SKINCARE + HAIRCARE**

Natural | Sustainable | Upcycled

DISCOVER OUR RANGE

Join over 600,000 happy customers!

VEGAN, ECOFY, CRUELTY-FREE, PLASTIC NEUTRAL

Source(s): Praxis analysis

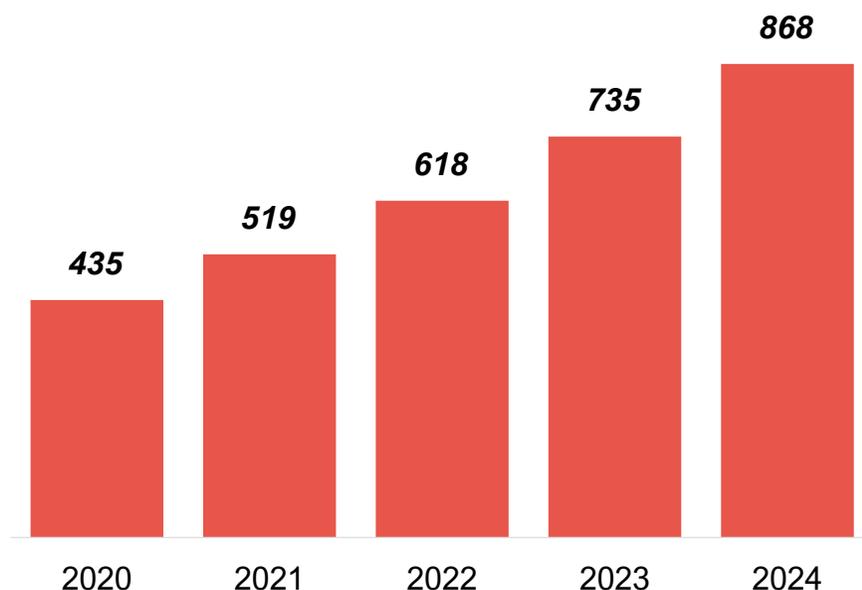
## Market penetration strengthened through vernacular and hyper-local relevance

868M users accessed internet in vernacular languages in 2024, growing at 19% CAGR in 2020-2024

Vernacular language internet users  
(#M, 2020-2024)

CAGR  
2020-2024

19%



Stronger engagement and increasing usage levels are observed across social platforms in vernacular user segments



1.5-2x

Higher engagement in regional content

amazon

60%

New users from vernacular segments\*



30%

Higher reel completion rates in regional languages

YouTube

95%

Content consumed in regional languages

Google

43%

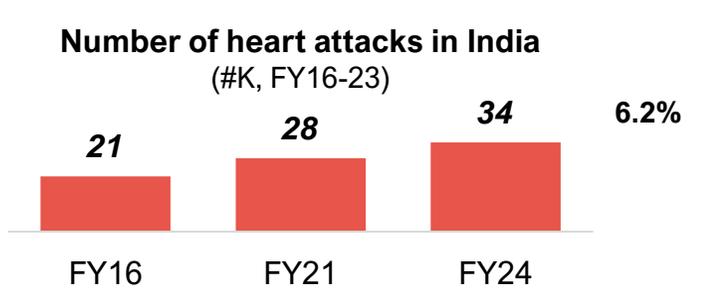
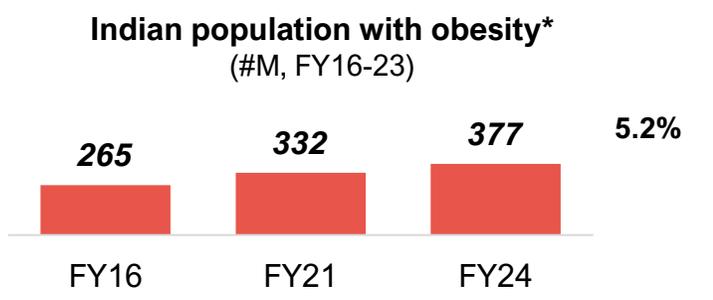
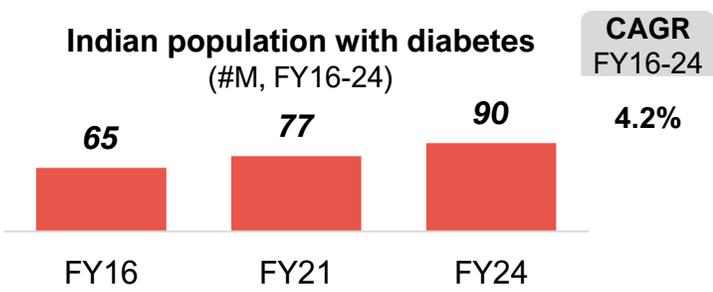
Increased user adoption in remote parts enabled by vernacular-first learning for children (Google's Read Along)

**With vernacular internet usage surging and social media engagement rapidly increasing for content in vernacular languages, brands must adapt their communication to match these evolving consumer preferences**

# Product strategy that harmonizes instant utility with long-term benefits

## Chronic conditions are rising across India...

<b>Vital organ health concerns</b>
Diabetes
Heart related concerns
BP related problems
Liver related conditions
<b>Weight management</b>
Obesity
Weight loss related disorders
<b>Dermatological</b>
Acne
Hemorrhoid
Fungal infections
Itching and cold sore problems
Scalp related problems - head lice, hairfall, etc.
Feminine intimate care
Eczema and psoriasis
<b>Others (vitamins / minerals deficiency etc.)</b>
Eye health – age related macular degeneration
Vitamin deficiency
Cognitive health problems
Menopause related problems (vaginal dryness, weight gain)
Joint health
Bone health



## ...calling for products that provide instant relief and build long-term adherence

**Instant relief**  
*Immediate comfort that earns trust*

Visible benefits within hours or days  
(Melatonin gummies for better sleep, anti-anxiety medicines)



**Consistent use**  
*Reliability creates routine*

Recurring small wins builds habit  
(Daily supplements, exercise routines)



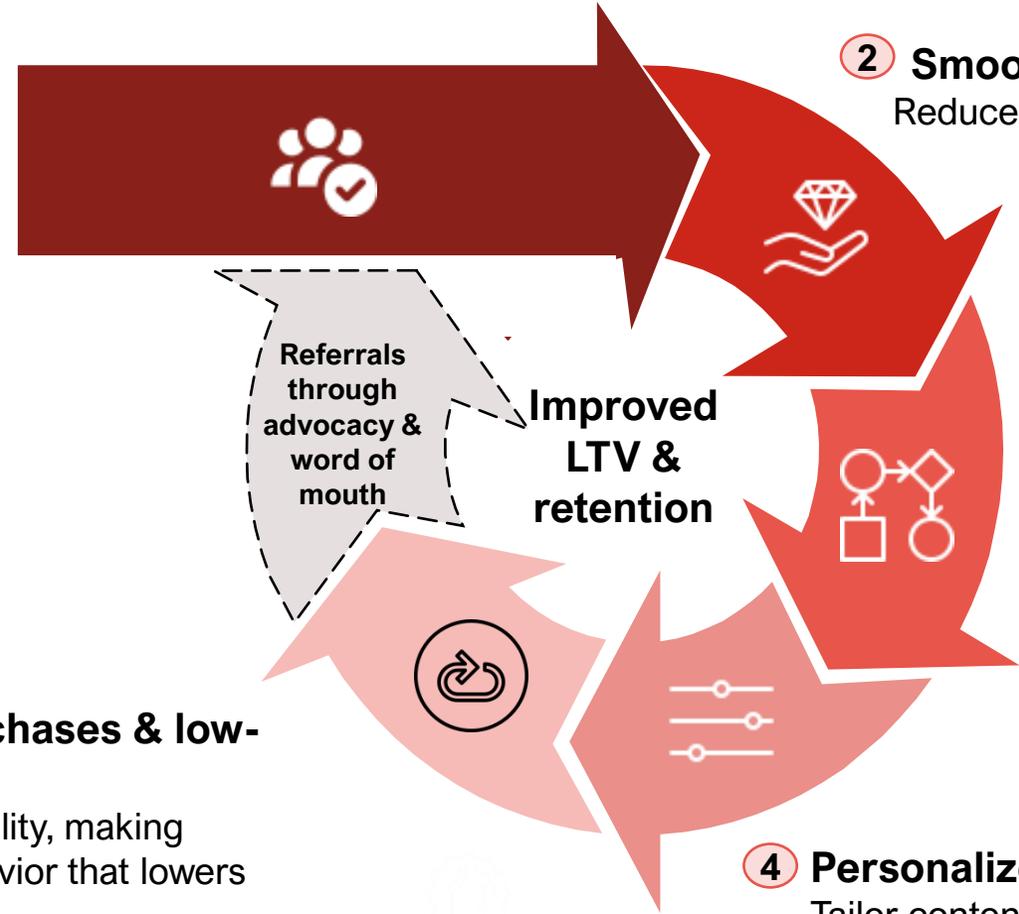
**Long-term adherence**  
*Routine leads to long-term protection*

Supports chronic prevention  
(Better sleep cycles, long-term weight management)

Note(s): \*Including overweight concerns  
Source(s): Praxis analysis

# 5 Financial steering centered on LTV-driven growth through better retention and customer endorsement

**1 High-quality acquisition**  
Acquire high-propensity, high-LTV cohorts through improved segment targeting targeting and efficient CAC



**2 Smooth onboarding & early value unlock**  
Reduce friction and help users experience their first meaningful benefit quickly

**3 First-cycle habit establishment**  
Reinforce routine usage through nudges, guidance, and small “wins” that build confidence

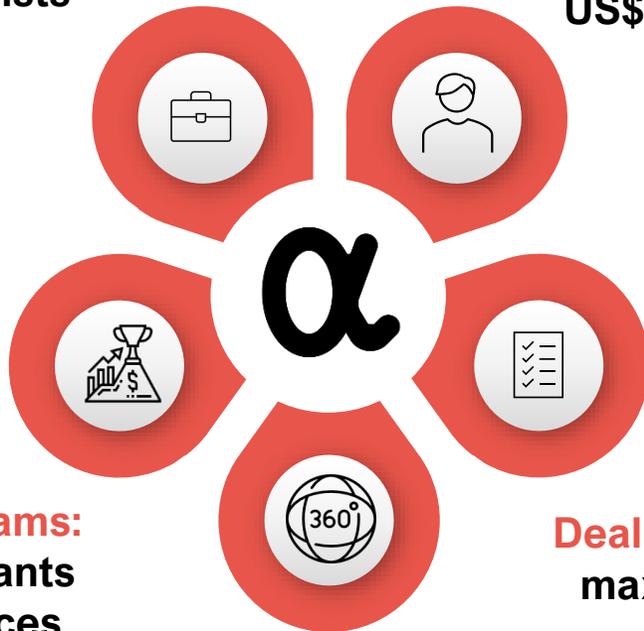
**5 Autonomous repeat purchases & low-churn cohorts**  
Increase product indispensability, making repeat buying a user-led behavior that lowers churn

**4 Personalized engagement & contextual journeys**  
Tailor content, reminders, and interventions to user needs that help them keep progressing

# Praxis: Leading management consulting firm helping financial sponsors maximize IRR and manage risk

## We help generate 'Alpha'

**Sector specialists**, not generalists



**Deal experience:**  
1,500+ deals,  
US\$ 65B worth

**PE-trained teams:**  
150+ consultants  
across 4 offices

**Deal to Exit:** IRR  
maximization

**Data advantage:** 'On  
ground' research

## The Praxis Edge

Investor mindset...

...with Operator  
eyes



**Analytical  
Rigor**

### What we do

Pre-deal: Sector  
scans

Deal: CDD / ODD /  
Tech / IDD

Exit: VDD, IPO  
readiness

**Alpha Generator™: Portfolio value creation**

**DealsAI™: Fund strategy and administration**

# Overview of Consumer practice at Praxis Global Alliance

## How we work with Consumer companies...

100+

Deals

US\$ 5B+

Capital raised



Transform through AI



GrowRevenue

Accelerate revenue growth

GrowPerformance

Build capability that drives better performance

GrowValue

Deliver superior returns for shareholders

## Industries we work in...

Apparel, fashion & beauty

Consumer health & tech

Home and durables

Travel & hospitality

Omnichannel retail, D2C

Consumer services and others

Fund strategy

Vendor Due Diligence (VDD)

## How we work with Consumer investors...

Commercial Due Diligence (CDD)

- Market growth sustainability
- Competitive defensibility (brand IP, distribution reach, scale, etc.)
- Business model evaluation
- Voice of stakeholders (consumers, e-commerce marketplaces, distributors, etc.)
- Unit economics and sustainability of cash flows (consumers, retailers, etc.)

Post acquisition value creation

- 100-day plan
- Revenue acceleration
- Margin expansion
- Inorganic growth



**THANK YOU**

***#BuildTogetherWinTogether***