

World Yoga Day 2025

June 2025

Research Design

Target Group

- Location : Pan India
- Age group 21 to 60 years,
- Should be a health insurance policy holder/ influencer

Methodology

- Surveys will be collected through
- The in-house panel of Hansa Research Group
- Structured questionnaire to be approved by the client
- Interviews will be conducted in English. LOI of the interviews will be up to 12 minutes.
- This will be a blind study; respondents will not be informed that study is being conducted on behalf on Hansa Research

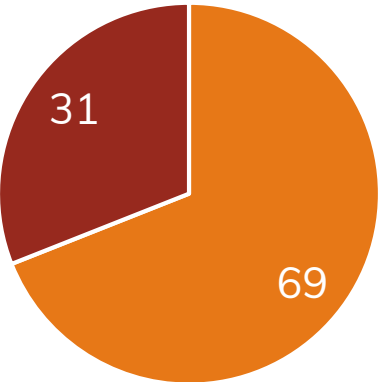
Sample Plan

Zones	Sample Achieved
East	203
North	212
South	230
West	215
Total	860

Age group	Sample Achieved	Age gen	Sample Achieved
21-35 years	350	Gen Z	112
36-45 years	280	Millennials	496
46-60 years	230	Gen X	252
Total	860	Total	860

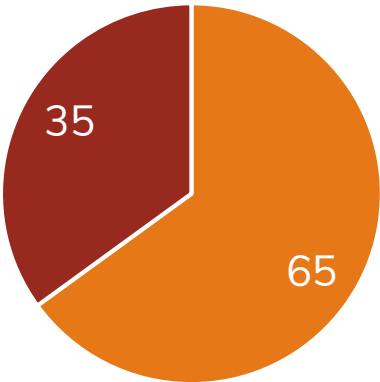
Demographic representation

Town class



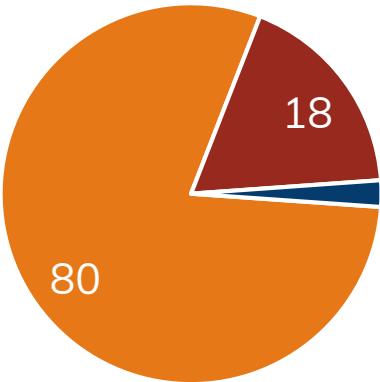
■ Metro ■ Non metro

Gender



■ Male ■ Female

SEC



■ SEC A ■ SEC B ■ SEC C

Findings

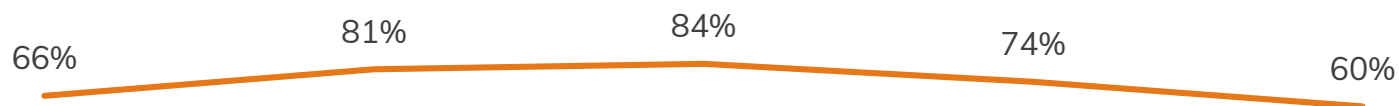
A. Lifestyle changes

Positive changes in the last 5 years

Millennials have made the most positive changes in the last 5 years



Slightly higher proportion of males making positive changes (74%) compared to females (69%)



21 – 25 years

26- 30 years

31-35 years

36- 45 year

46-60 years

The proportion of changes made increases with age, peaks at the middle age (84% among 31-35 years) and then starts to taper off as age increases.

72%
customers have made some positive change in their life in the last 5 years

Influencers of lifestyle changes

- Family recommendation is the highest influencer for Gen Z (61%) while personal goals matter the most when it comes to Millennials (63%) and Gen X (62%)
- Social media has a higher influence on Gen Z (56%) and Millennials (55%) while only 41% Gen X are influenced by this medium.
- Media and advertising is a good influencer for Millennials (41%) but lesser for Gen Z (33%) and Gen X (29%)
- Healthcare / professional advice matters most to Gen Z (44%) but not as much for Millennials (36%) and Gen Z (36%)
- No major differences among genders, except Social media is a higher influencer for females (58%) compared to males (48%)

	Total	GenZ	Millennials	Gen X	Male	Female
Personal health goals	62	59	63	62	61	64
Family recommendation	54	61	54	49	54	52
Societal/ peer influence	33	32	36	27	34	31
Had a health scare/ incident	37	34	39	35	39	34
Self-realization without incident	44	43	43	47	45	43
Workplace culture	43	45	44	38	41	45
Media and advertising	37	33	41	29	35	40
Social media influence	51	56	55	41	48	58
Healthcare professional advice	37	44	36	36	36	40

Practices adopted to improve mental & physical health

Daily walks, balanced diet and yoga are the most popular to improve mental and physical health, both more popular among Gen X customers and males more than females.

Gym workouts a popular choice among Gen Z. Removal of harmful habits not a big concern here (probably due to low exposure in the first place)

#1

Daily walks

#2

Balanced diet

#3

Yoga



Age Generation			Gender	
GenZ	Millennials	Gen X	Male	Female
69	69	70	71	67
68	66	72	69	67
60	68	71	69	65
58	61	68	64	58
72	60	57	60	61
56	60	51	57	57
51	50	58	55	47
38	53	56	59	38
34	36	32	33	37

How important are these practices?

Extreme importance given to a balanced diet, maximum among millennials. Gen Z give maximum importance to curtailing bad habits. Regular exercise/ gym is also a highly important practice, mainly among Millennials and Gen Z. Yoga popular among Gen X

Practices	Total	Age generation			Gender	
		Gen Z	Millennials	Gen X	Male	Female
Daily walks		48%	57%	53%	56%	53%
Balanced diet		64%	77%	67%	73%	71%
Yoga		60%	62%	66%	65%	60%
Reduced intake of junk food		56%	60%	59%	62%	53%
Regular exercise/ Gym workouts		67%	70%	61%	67%	68%
Improved sleep hygiene		51%	65%	59%	60%	66%
Mindfulness or meditation		52%	62%	61%	61%	58%
Reduced / removed harmful habits like Alcohol, smoking etc.		73%	63%	64%	66%	60%
Preventive health & medical care like check ups, vaccinations etc.		57%	54%	58%	56%	54%

Qn: For each practice you've adopted, please rate its importance in achieving your health goals

■ Not at all important
 ■ Not so important
 ■ Neutral
 ■ Very important
 ■ Extremely important

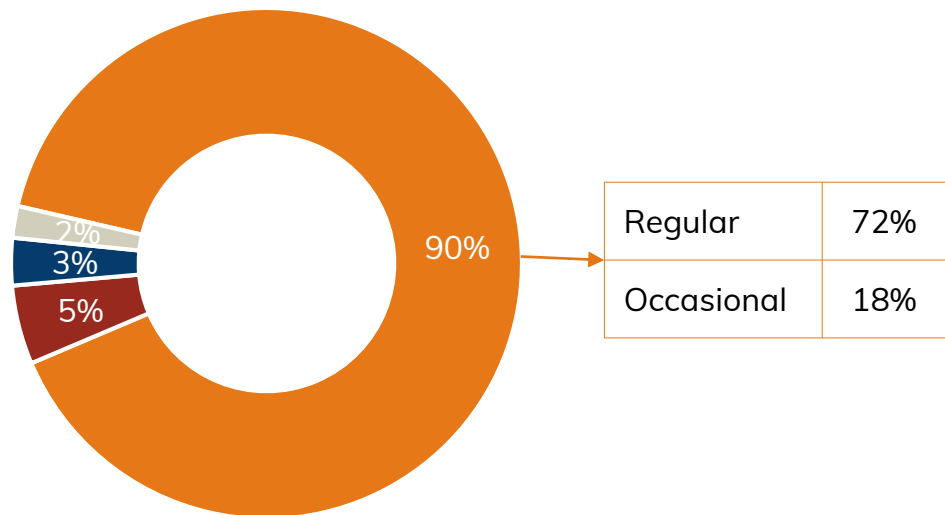
% Extremely important shown in the table above

Findings

B. Yoga uptake & benefits

Engagement with yoga

Penetration of yoga



Yoga has only 3% rejecters

- Regular practice of yoga more common among Millennials (74%) followed by Gen X (70%) but lesser among Gen Z (68%)
- Gen Z however, are more inclined to practice Yoga occasionally (28%) which is least among Gen X customers (14%).
- No major difference in yoga adoption among males and females.
- Yoga is least popular among unmarried people (65%) compared to 70%+ at other life stages.

Regularly practice yoga (more than once a week) + Occasionally practice yoga (about 2-4 times a month)
Not tried but consider starting
Tried but discontinued
Never tried or considering trying

- Adopters
- Considerers
- Rejectors
- Non-considerers

In-person classes at yoga studios or wellness centers	45%	Maximum preference among Millennials (51%)
Online classes or live-streamed sessions	28%	Similar preference
Pre-recorded videos or mobile applications	13%	Maximum preference among Gen Z (21%)

Where do you practice yoga?

Benefits of yoga | Awareness & Experienced



Aware
Experienced

66%

52%

Reduces stress and anxiety



64%

55%

Improves sleep quality



58%

51%

Improves flexibility and balance



58%

50%

Better physical appearance



56%

48%

Improves concentration and focus



55%

45%

Enhances heart health



Aware
Experienced

55%

48%

Boosts immune system¹



55%

48%

Enhances mood and emotional stability



52%

42%

Helps lose weight



52%

50%

Relieves body aches/pain



47%

42%

Boosts self esteem



21%

13%

Develops social connections

Qn: Which of the following benefits associated with yoga are you aware of

Qn: Which of these have you experienced since starting yoga

Benefits of yoga | Awareness & Experienced

Yoga benefits	Age generation						Gender			
	GenZ		Millennials		Gen X		Male		Female	
	Aware	Experienced	Aware	Experienced	Aware	Experienced	Aware	Experienced	Aware	Experienced
Reduces stress and anxiety	61%	49%	63%	51%	75%	56%	69%	52%	61%	51%
Improves sleep quality	65%	50%	60%	55%	70%	56%	65%	55%	62%	53%
Improves flexibility and balance	56%	50%	57%	50%	62%	52%	63%	52%	51%	48%
Better physical appearance	56%	49%	57%	49%	58%	52%	58%	52%	57%	44%
Improves concentration and focus	54%	46%	53%	47%	65%	50%	59%	50%	51%	44%
Enhances heart health	56%	51%	53%	43%	60%	47%	61%	49%	46%	39%
Boosts immune system	53%	49%	53%	47%	60%	50%	59%	49%	48%	46%
Enhances mood and emotional stability	49%	50%	53%	49%	60%	45%	59%	49%	47%	46%
Helps lose weight	51%	31%	51%	44%	55%	43%	51%	41%	53%	43%
Relieves body aches/ pain	53%	50%	50%	48%	56%	53%	52%	52%	51%	45%
Boosts self esteem	52%	52%	47%	41%	47%	38%	51%	42%	41%	42%
Develops social connections	24%	16%	18%	13%	26%	11%	25%	13%	14%	12%

Gap between awareness and experience is 10% or more

Uses and effectiveness of yoga

Only 64% workplaces offer any yoga-related wellness programs

27% respondents feel that yoga alone is not sufficient to achieve health and wellness goals

The lowest is offered by workplaces attended by Gen X (50%)

What do they complement yoga with?	Regularly or occasionally
Meditation or mindfulness practices	98%
Balanced diet/nutrition planning	94%
Regular medical check-ups	86%
Cardiovascular exercises (e.g., running, cycling, swimming)	79%
Strength training	73%
Alternative therapies (e.g., Ayurveda, Homeopathy)	73%
Self-defence lessons	53%
Dance or other form of movement	52%

Qn: Does your workplace offer any yoga-related wellness programs

Qn: Do you believe that yoga alone is sufficient to help achieve your health and wellness goals

Qn: What other practices do you complement yoga with to achieve your health and wellness goals?

World Yoga Day

High awareness of World Yoga Day among respondents across demographics

96% awareness



Sources of information	%
Social media	80%
Newspaper	64%
Friends/ Family	50%
Colleagues/ Workplace	46%
Magazine	42%

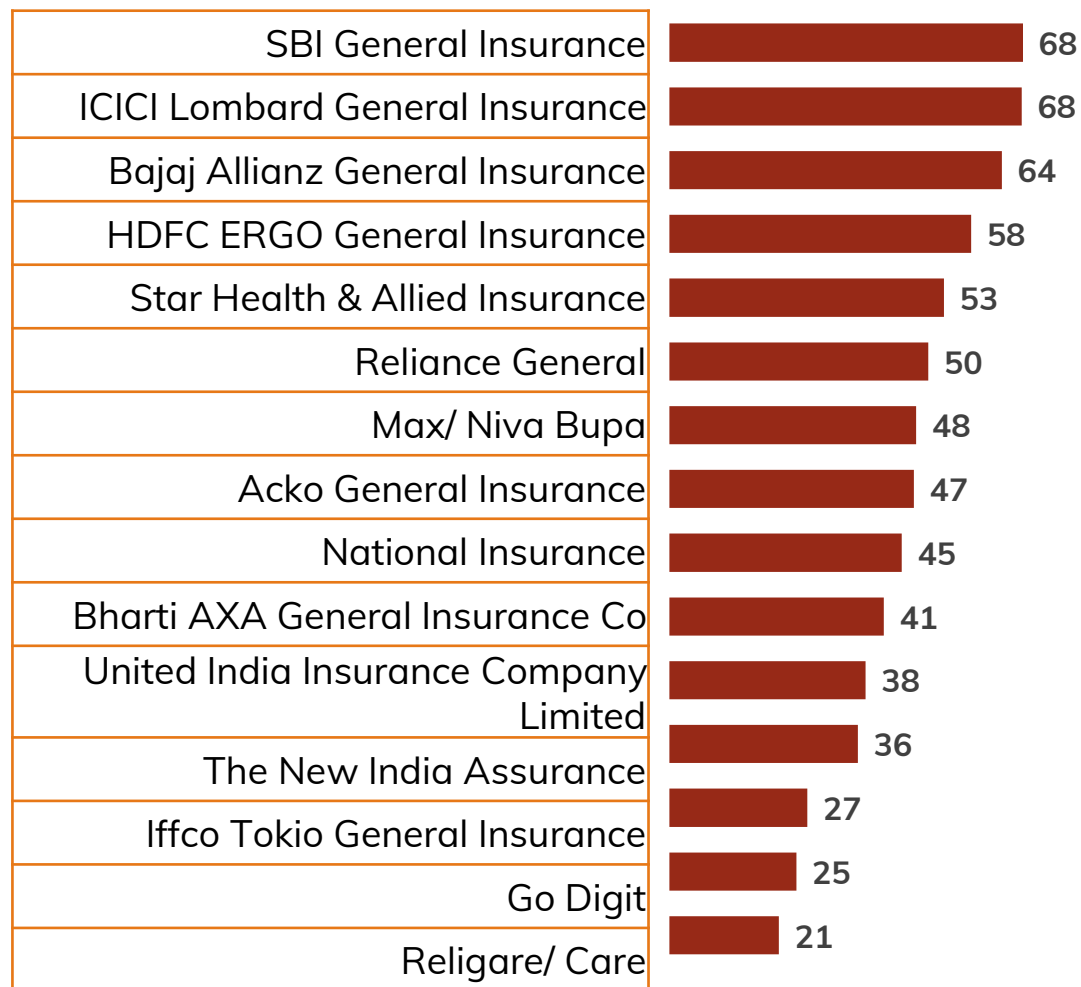
- Newspaper is a bigger source of learning about World Yoga Day among Millennials (66%) and Gen X (67%)
- Social media is the largest source of information among Millennials (85%)
- Across age generations, the awareness for Yoga day is similar (96%) – the main source of information for Gen Z is Social media (73%) followed by colleagues/ workplace (51%)

3 in 4 have participated in a yoga-related event in the past
9 in 10 will be interested in joining in online or offline sessions organized around Yoga Day.

Findings

C: Health & Wellness providers

Player awareness in the HI space

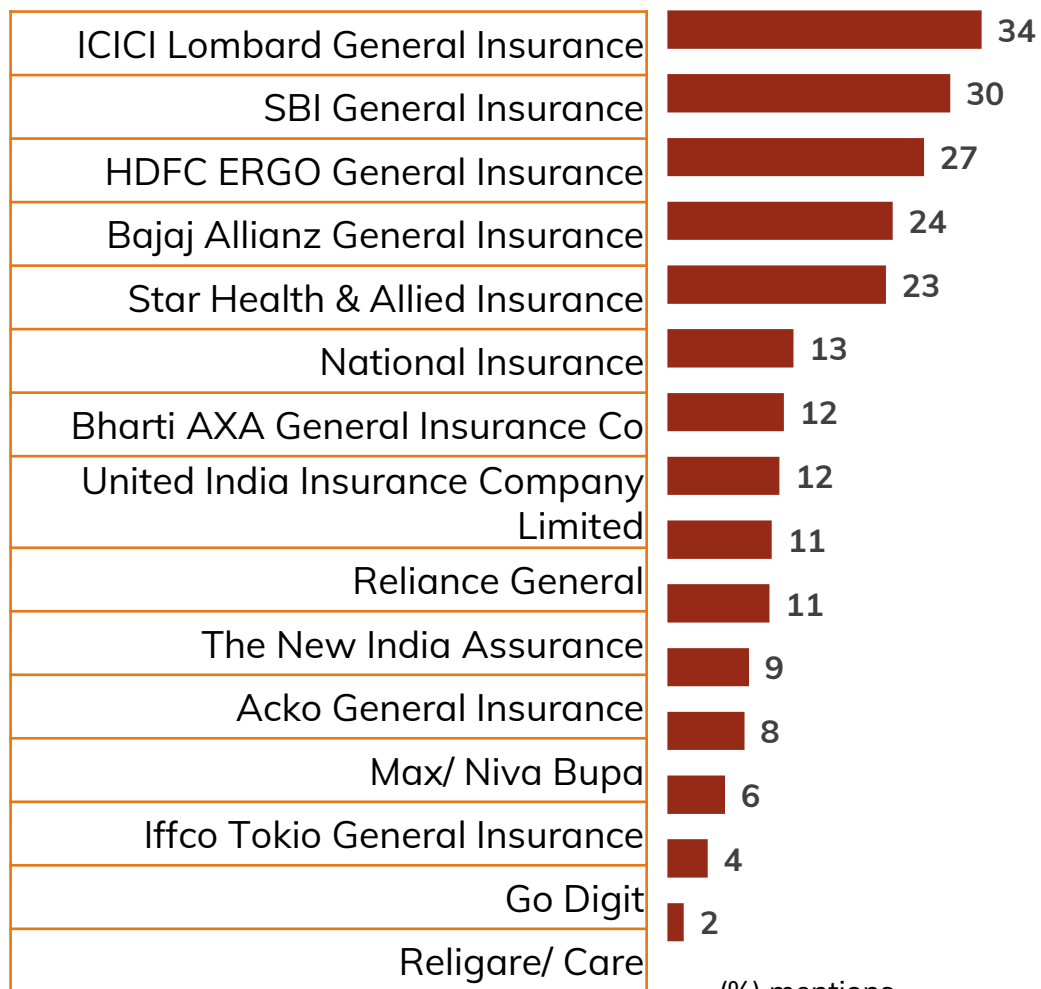


(%) mentions

GenZ	Millennials	Gen X	Male	Female
68	67	71	70	65
59	66	77	68	67
54	62	73	67	58
59	57	60	59	57
44	53	58	51	57
44	46	61	54	43
38	46	55	51	42
38	49	47	49	43
45	38	58	47	41
22	43	48	39	46
32	33	51	39	36
24	34	47	39	32
19	27	29	28	24
20	26	23	26	21
17	17	31	23	18

Among Gen X, the awareness is highest for ICICI Lombard. Even among Millennials, ICICI Lombard is a close second to SBI

Policy ownership in HI space



(%) mentions

Most preferred (%)	GenZ	Millennials	Gen X	Male	Female
25%	27	35	33	35	31
15%	34	31	27	30	31
13%	29	32	18	28	27
12%	25	26	20	25	23
11%	21	23	25	21	28
5%	16	13	13	13	14
3%	12	13	11	11	16
2%	13	13	10	12	12
3%	13	12	9	12	10
2%	8	13	9	12	9
3%	11	9	7	9	9
4%	13	7	9	10	6
1%	7	6	6	7	5
1%	7	5	2	4	4
0.2%	6	1	2	2	1

Though awareness of SBI General is the highest, ICICI Lombard has the highest purchasers, only lower among Gen Z customers where maximum hold SBI policy (despite lower awareness)

Qn: Which of these do you have an active health insurance policy with

Qn: Which of these policy providers do you most prefer

Reasons for preference across players

	ICICI Lombard	HDFC Ergo	Bajaj Allianz	SBI General	Star Health	Max Bupa	National
Covers more number of diseases	51	29	35	42	39	50	43
Company who is always ahead in introducing new products, services, schemes	51	31	31	34	29	29	43
Company that has access to more hospitals across the country	48	33	36	33	41	34	53
Provides very good benefits at the time of renewal	47	32	40	28	29	50	43
Company that offers flexible premium payment	47	34	33	38	36	63	53
The company representatives/ agents are professional	46	35	32	29	27	39	70
Encourages me to look after my health	45	41	38	35	28	58	45
Offers competitive price for a health insurance product	45	30	35	31	37	47	35
Convenient and hassle-free purchase processes with minimum paper work	45	35	32	30	30	50	53
Has a customer friendly renewal process	44	35	37	34	37	47	45
Recommended by friends/family/Colleagues	44	35	33	26	35	39	48
Has knowledgeable and well informed agents	43	38	34	29	23	50	60
Has a good network of agents/offices across the country	43	36	37	40	29	61	43
Has a wide range of products to suit my family needs	43	42	35	30	38	45	40
Has customer friendly website for easy purchase/renewals online	42	40	34	27	27	34	53
Offers attractive wellness benefits like membership of gym/ sports complex etc.	42	39	32	29	20	42	38
Company I can trust for securing an insurance cover	41	37	38	37	35	58	43
Company which has appealing/attractive advertising	41	34	31	25	23	58	50
Provides fastest cashless claim settlements	41	34	37	33	38	45	50
Has friendly and responsive service	40	31	32	29	30	50	28
Provides attractive benefit programs on 'no claim bonus'	40	31	37	31	24	45	48
Have heard a lot of good things about this company recently	37	34	36	31	29	47	38
Company that always stays in touch with me	36	37	29	28	33	47	45
Offers policies that are affordable	13	12	13	13	15	24	5

Qn: prefer the most because

Only players with base > 30 have been reported

Reasons for preference for ICICI Lombard

	ICICI Lombard	Age generation			Gender	
		GenZ	Millennials	Gen X	Male	Female
Covers more number of diseases	51	45	47	63	55	44
Company who is always ahead in introducing new products, services, schemes	51	55	51	51	51	52
Company that has access to more hospitals across the country	48	60	40	63	51	40
Provides very good benefits at the time of renewal	47	50	41	61	51	37
Company that offers flexible premium payment	47	45	41	59	50	39
The company representatives/ agents are professional	46	35	42	59	49	39
Encourages me to look after my health	45	55	41	53	47	40
Offers competitive price for a health insurance product	45	55	41	51	49	35
Convenient and hassle-free purchase processes with minimum paper work	45	55	44	44	49	37
Has a customer friendly renewal process	44	30	41	56	47	39
Recommended by friends/family/Colleagues	44	50	38	56	45	40
Has knowledgeable and well informed agents	43	50	37	54	46	35
Has a good network of agents/offices across the country	43	50	41	46	45	37
Has a wide range of products to suit my family needs	43	40	39	54	44	40
Has customer friendly website for easy purchase/renewals online	42	40	35	59	42	42
Offers attractive wellness benefits like membership of gym/ sports complex etc.	42	25	40	51	45	34
Company I can trust for securing an insurance cover	41	50	37	47	41	40
Company which has appealing/attractive advertising	41	25	39	51	44	34
Provides fastest cashless claim settlements	41	30	39	47	41	40
Has friendly and responsive service	40	50	37	44	43	34
Provides attractive benefit programs on 'no claim bonus'	40	45	41	37	41	37
Have heard a lot of good things about this company recently	37	30	36	44	38	35
Company that always stays in touch with me	36	40	33	42	39	31
Offers policies that are affordable	13	35	9	14	13	13

Findings

D. Health & Wellness features

Awareness of features among policy holders for ICICI Lombard



Even among customers who own an ICICI Lombard policy, maximum awareness is for Undergoing health check-up (64%) and getting points for achieving monthly steps (62%). Considering these are policy owners, awareness needs to be created around policy inclusions and exclusions.

Features of health and wellness policies

Most importance given to Undergoing health check-up and Health risk assessment (highest among millennials)
 Least importance for participation in professional sporting events and face scans.

Features	Total	Total	Age generation			Gender	
			Gen Z	Millennials	Gen X	Male	Female
Alternative therapy coverage (e.g., Ayurveda, Homeopathy)	<div><div>2%</div><div>14%</div><div>31%</div><div>52%</div></div>	83%	81%	85%	78%	83%	82%
Health Risk Assessment	<div><div>9%</div><div>37%</div><div>53%</div></div>	90%	86%	92%	89%	92%	87%
Undergoing Health Check-Up & uploading the reports	<div><div>8%</div><div>40%</div><div>51%</div></div>	91%	88%	92%	90%	91%	91%
Face scan once a quarter	<div><div>8%</div><div>20%</div><div>36%</div><div>33%</div></div>	69%	71%	73%	60%	68%	71%
Chat feature usage of Health Expert/ Health Coach Service	<div><div>4%</div><div>15%</div><div>41%</div><div>39%</div></div>	80%	77%	83%	77%	82%	77%
Participation in company initiated health Contest/ health quiz	<div><div>6%</div><div>17%</div><div>37%</div><div>37%</div></div>	74%	75%	77%	66%	75%	72%
Participation in company initiated Webinar	<div><div>7%</div><div>20%</div><div>37%</div><div>33%</div></div>	70%	71%	74%	62%	70%	69%
Achieving targeted steps per month (by getting points/ day on completed steps)	<div><div>4%</div><div>14%</div><div>42%</div><div>38%</div></div>	80%	84%	84%	71%	79%	82%
Participation and successful completion of fitness challenge in the company App	<div><div>4%</div><div>15%</div><div>42%</div><div>37%</div></div>	79%	82%	82%	72%	79%	80%
Participation in Professional sporting events like Marathon/Cyclathon/ Swimathon etc	<div><div>8%</div><div>20%</div><div>32%</div><div>37%</div></div>	69%	78%	73%	57%	68%	71%

■ Not at all important

■ Neutral

■ Extremely important

■ Not so important

■ Very important

Qn: Rate each of these health and wellness features on how important they are to you when it comes to purchasing a policy

Key Highlights

Key highlights

Close to 3 in 4 customers have made some positive change in their life in the last 5 years, maximum among millennials and least Gen X.



Balanced diet is seen as extremely important among 72% customers followed by regular exercise/ gym at 67%



Family recommendation is the highest influencer for Gen Z (61%) while personal goals matter the most when it comes to Millennials (63%) and Gen X (62%)



9 in 10 people have an engagement with yoga either regularly or occasionally.



Daily walks, balanced diet and yoga are the most popular to improve mental and physical health.



Reduces stress and anxiety
Improves sleep quality
Improves flexibility and balance are the top 3 reasons for incorporating yoga in life



Key highlights

27% respondents feel that yoga alone is not sufficient to achieve health and wellness goals complementing it with meditation/ mindfulness, diet and regular check-ups



96% awareness of World Yoga Day, maximum through social media (80%) followed by newspapers (64%)



IL's leadership in Awareness, Preference and Wellness Features

- **High Brand Awareness:**

2 in 3 consumers are aware of ICICI Lombard (IL) Health Insurance, with the highest awareness among older generations and millennials

- **Strong Policy Ownership:**

About one-third of customers currently own an IL health insurance policy, with Millennials showing the highest ownership.

- **Top Brand Preference:**

IL continues to be the most preferred brand among Millennials and male audience

- **IL perceived as a leader for innovation and coverage:**

- Millennials see IL as a leader in launching new products and services, contributing to its top preference ranking
- Both Gen Z and older generations believe IL offers access to a wider hospital network across the country, whereas older generations perceive that IL addresses their primary concern i.e. covering a broader range of diseases in its health plans

- **High Awareness of Wellness Features Among Policyholders:**

- Nearly 2 in 3 IL policyholders are aware of wellness benefits such as doing health check-ups and uploading reports via the company app
- 3 in 5 are also familiar with earning points through monthly step goals, completing fitness challenges, and conducting health risk assessments via the mobile app

Thank You!