

Building a gentle, non-clinical digital companion that helps young professionals build emotional resilience - Market Context and Research Plan for Building the MVP

Market Outlook

India mental-health market expected to grow from US\$ 6.89 billion in 2023 to US\$ **62.86 billion** by 2032 (CAGR: **28.16%**) with digital mental health solution segment currently holding **29%** share.



About **197 million** Indians are suffering from mental health issues.



Leading mental health apps have recently seen an increase of **45%** in download



Key Growth Drivers: Rising awareness towards mental health, expanding digital infrastructure, rapid internet penetration, and supportive government policies.



Key Players: Calm, Headspace, Sleep cycle, Wysa, Your Dost.

Source: [Yahoo Finance](#)

What is Mental Health?

Mental health is your emotional, psychological, and social well-being. It affects how you think, feel, act, handle stress, and relate to others.

It ranges from:

- **Self-care needs** (e.g., mindfulness, sleep) – no medical help needed.
- **Mild issues** (e.g., stress, anxiety) – may need some support.
- **Serious conditions** (e.g., depression, PTSD) – require professional treatment.

What are Mental Health Apps?

Mental health or well-being apps are digital tools designed to support emotional and psychological health. They help users manage stress, anxiety, mood, sleep, focus, and overall mental wellness.

Common Features: Mood tracking, Meditation & mindfulness exercises, sleep tracking, journal writing & gratitude logs, self-help content (videos, articles, exercises), therapy or counseling access

Objective

To build a **gentle, non-clinical digital companion** that helps **young professionals** build **emotional resilience**. To understand underlying user needs & motivations and identify white spaces in the market landscape, we conducted User Research including Primary Research and Secondary Research. The detail methodology is as follows:

Primary Research

Formulation of Hypothesis

Translate Hypotheses into Research Questions

Conduct Survey and User Interview

Analyze Responses

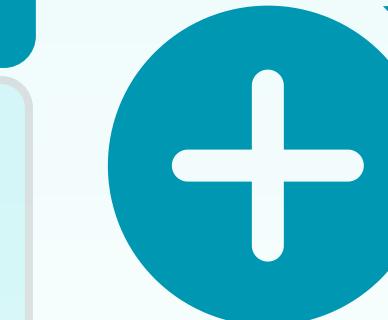
Validate/Invalidate hypotheses

Convert Findings into Product Decision

Secondary Research

Competitor Analysis across product categories, business model, pricing, market share and distribution channels.

Developing understanding of key user behaviour trends of the target user segment



Secondary Research - Analysis reveals an untapped opportunity for peer support with light professional coaching in early mental well-being space

Market Landscape

As per a [research article](#), there are over 10,000 mental health and wellness apps on the market. However, only a few of them hold majority of market share.

App	Market Share	Downloads in millions	RpD* in USD
Calm	36%	100+	3.88
Headspace	18%	50+	4.63
Pokemon	8%	10+	8.05
Sleep Cycle	9%	50+	2
BetterSleep	5%	50+	1.06
Fabulous	5%	20+	1.09

Source: [App Magic](#) [Business of Apps](#)

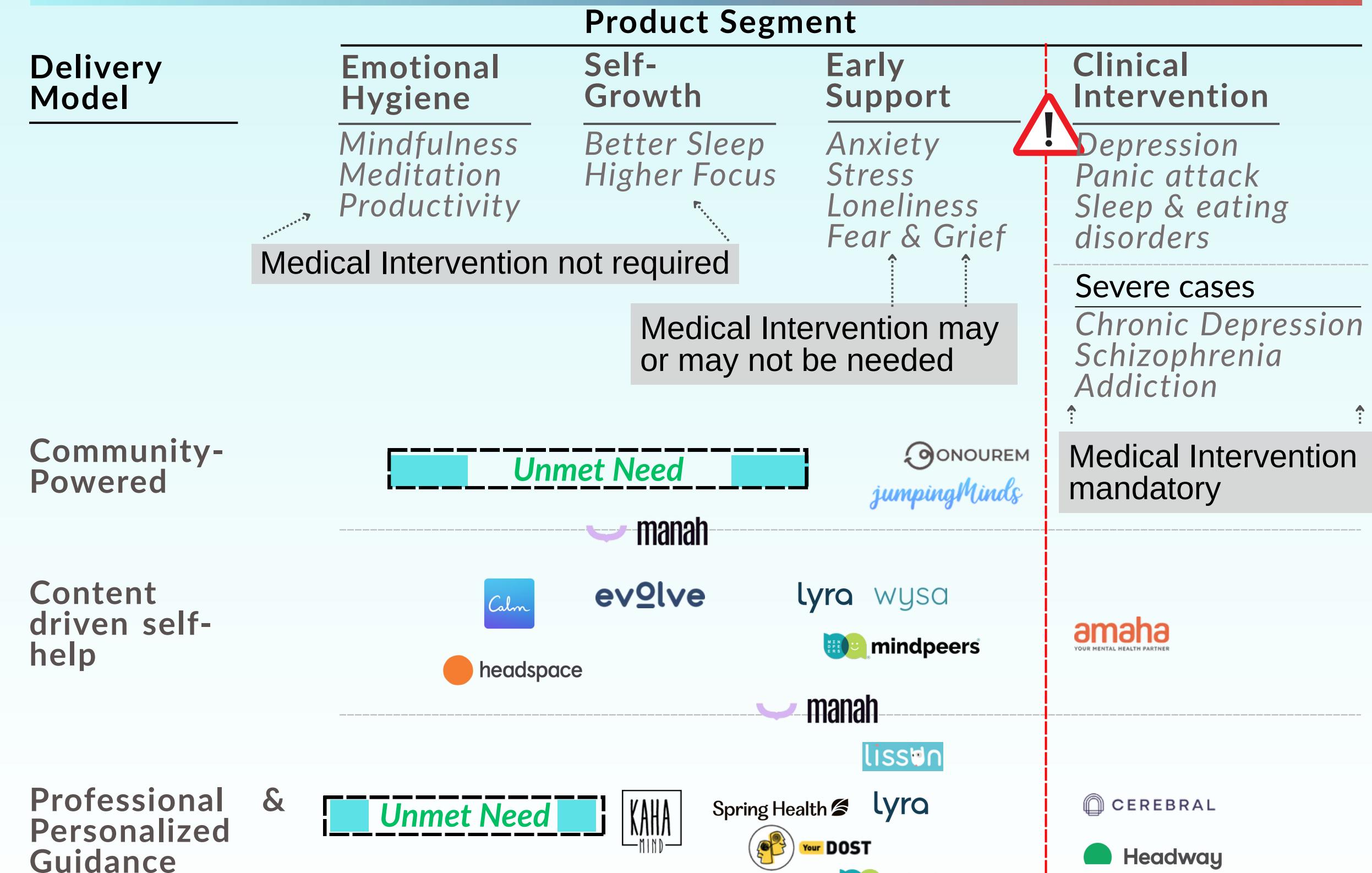
Key User Trends

Young adults (21-45) are more willing to discuss mental health, fueled by social media and celebrity advocacy. Young adults trust peers and social channels.

Users choose affordable app-based tools over therapy but often churn quickly.

Competitor Analysis

Delivery Model



*RpD - Revenue per Download over cumulative lifetime of app

⚠ Crisis Point

Source: Blume Ventures

Primary Research - Survey shows young professionals face widespread emotional strain and demand quick, private, personalized, stigma-free digital support

Problem Hypothesis

Hypothesis

A clear majority* of young professionals/ target users regularly feel emotional strain



Majority** of the target users find current coping methods ineffective



Behaviour Hypothesis

Majority of target users avoid therapy, believing their issues aren't serious enough



Majority target users drop off from the apps that are long, judgmental, or over-notify



Motivation Hypothesis

Significant no.*** of users would like an emotional check-in app if it feels safe, supportive, and quick



A clear majority want private, safe tools without judgemental tone or tracking



Majority Users value quick, low-effort tools for emotional reflection



Personalized human-language insights make majority users feel more supported and engaged



Survey Overview

- Total no. of respondents = 33, 91% of the respondents are aged between 24-32.
- 82% are salaried professionals with 64% having desk based roles. 64% of the respondents are from metro or tier 1 cities.

Key Findings of the Survey

Insights

97% of respondents feel emotional drag weekly; 18% experience it \geq four times a week.

Widespread emotional strain

56% don't feel the need of professional help.

Demand for stigma-free solutions

61% find current coping method helpful, 32% very helpful; yet 42% report unmet needs.

Coping Methods offer limited relief

42% are comfortable using such an app, and 39% said may be comfortable.

Openness to Digital Solutions

64% might drop off if sessions are long, 52% due to generic or judgmental experience, and 71% if notifications are too frequent.

Clear drop off risks

71% highly value privacy, ad-free content, and a non-judgmental tone.

Privacy and Experience preferences are paramount

51% prioritize low-effort input to adopt the app.

Value of Personalization

At least 61% say personalized, human-toned insights help them feel emotionally supported.

*Clear Majority ~ >65% | **Majority ~ >50 % | ***Significant no ~ >30%.

● Hypothesis validated by survey findings

● Hypothesis invalidated post survey

Primary Research - User interviews reveal a need for personalized, private, and community-driven emotional support.

Overview of User Interview (n=5): A total of 5 participants coming from diverse backgrounds (mode of recruitment -acquaintances and social media) were interviewed for 1 to 1 user interview.

What Participants said

Ayushi, 28 F
Product Manager

Umang, 29 M
MBA Graduate

Swapnil, 31 M
HR Manager

Mayank, 28 F
Entrepreneur

Swapnil, 31 M
HR Manager

“
I'd drop off if the app spammed me with notifications or felt generic.

“
One of the most powerful things is community: knowing you're not alone, seeing others who have gone through the same issues and come out the other side

“
Scheduled notifications respect my routine; timely nudges make the intervention effective without being intrusive.

“
Emojis feel too restrictive; natural language is best for honest expression.

“
I don't want the app mining my entries for recommendations; just give me a quick, friendly check-in.

Key Insights



Avoid generic content and notification spam



Community based shared experiences can foster support and reduce user loneliness



User want more control in app interactions



Users want freedom in emotional expression.



Simplicity and data privacy are pivotal

Target User Segment

Young and tech savvy professionals (aged 24-32) with persistent feeling of emotional strain who want to recognize, regulate and reflect their mental health in a trustworthy, non-clinical, and stigma free environment.



Astha, 27 F
Product Designer,
Bengaluru

“
I want something that listens to me without labeling me.

User Persona 1

Lives alone. Quite active on social media, watches self help content. Gets overwhelmed during work stress.
Goals: Understand her emotions better, have a safe space to vent without being “judged”.

Pain-points: Unsure about how to handle emotional strains, doesn't want to bother loved ones with frequent emotional check ins. Therapy feels intimidating but fears being judged by others. Self help content feels too generic.



Rohan, 30 M
Business Analyst,
Mumbai

“
I'd use an app if it felt smart, non-judgmental, and fit into my routine.

User Persona 2

Lives with flatmates. Works long hours. Believes in self-improvement. Uses fitness apps to track health.
Goals: Be more aware of emotional triggers, improve focus and reduce stress, wants emotional support

Pain-points: Feels burnout but suppresses it to “keep performing”, has used self-help apps before but finds their too many notifications annoying, feels unsure about sharing personal sensitive data with anyone.

Understanding the Problem: Why Young Professionals Need Better Emotional Support



What is the true problem?

Young professionals face persistent emotional strain but lack accessible, safe, stigma-free, personalized, non-clinical and community driven support to manage their mental well-being before it escalates to a crisis. They avoid therapy (believing their issues aren't serious enough). generic content. Existing self help tools are often generic and provide limited relief.



Who is facing the problem?

Young and tech savvy salaried professionals (aged 24-32) with persistent feeling of emotional strain who want to recognize, regulate and reflect their mental health in a trustworthy, non-clinical, and stigma free environment.



How do we know that it is a real problem?

Primary and Secondary research validates the problem.

- 97% of the survey respondents feel emotional drag weekly; 56% avoid therapy, 42% indicated unmet needs.
- User interviews reveal that users seek personalization, community or shared experience based support, and non-intrusive, stigma-free tools.
- Secondary research shows a clear gap between self-help apps and clinical therapy.



What is the value generated by solving this problem?

For Target Users

- Proactive mental health management without stigma.
- Safe space for emotional check and reflection.
- Builds emotional resilience early on, before problems escalate.
- Reduces loneliness via peer support.
- Improves focus, productivity, and well-being.

For Business

- Taps into a massive underserved market: India's digital mental health market is growing at **28.16% CAGR**; **197 million Indians** face mental health issues.
- Higher user engagement and retention via personalization and peer-driven models.
- Potential to monetize via premium emotional check-ins, and community-based features.



Why should we solve this problem now?

- **Market Momentum:** India's digital mental health space is growing rapidly; app downloads have increased by 45%.
- **Social Readiness:** Young adults are now more open to discussing mental health due to social media advocacy.
- **Competitor Gap:** Most apps focus on therapy access or generic content; few address early, emotional hygiene support. Community based support is almost absent.
- **Cost of Delay:** Emotional strain is widespread and unmanaged stress today could snowball into clinical crises tomorrow.
- **Behavioral Shift:** Current generation expects human-toned, intelligent digital companions for wellness, creating demand for a new product category.

Mapping Business Outcomes to Product Outcomes and Exploring Opportunities for MVP

Key Business Outcomes

Rapid User Acquisition

1 Priority Outcomes

Strong Stickiness and Retention

2

Brand Trust & Advocacy

Long term business goals

Monetization

BO 1 → Product Outcomes

Rapid User Acquisition

no. of new sign-ups/week

App visits/ week

Organic Traffic

Paid-Ad Traffic

Landing Page CVR

Conversion Rate (CVR)

Referral CVR

Organic Traffic & Conversion Rates

Session frequency & notification click through rate

Underlying Opportunities

Leverage “*quick, low-effort check-ins*” to attract time-pressed professionals

“*Scheduled, respectful nudges*” that fit routines without spamming

“*Private, stigma-free*” experience with no generic/ judgmental content

BO 2 → Product Outcomes

Strong Stickiness

DAU/ MAU Ratio

Daily Active Users

Monthly Active Users

Day 1 Retention

30 days churn rate

Day 7 Retention

Session frequency/ user

Average Session Length

Push Notification Click through rate

Re-engagement email CTR

Solution Prioritization

Key Solution Ideas

Natural Language (NL) Powered Micro Check-Ins

- 1–2 sentence “How are you feeling?” in free text, with flexibility for one tap interactions using emojis or keywords
- Instant, human-toned response focusing on reflection (“It sounds like ...; what might help?”)
- Data never mined for ads; all on-device encryption

Routine-Respecting Nudge Scheduler

- User-defined “quiet windows” and preferred check-in times
- Smart delays if user is busy (calendar integration)

Peer Circles (“Light Community”)

- Opt-in groups of 5–8 peers with shared profiles (anonymized name + one line “I’m here for...”)
- Weekly “experience share” thread, moderated by light AI coach
- No public posting—only within your circle for safety

Lite Coaching Boost (Premium Add-On)

- Bi-weekly 5-minute audio/text session with certified coaches
- Goal-based check-ins (e.g. stress reduction plan)

Solution Prioritization

Feature	Reach (users/month)	Impact (0–3)	Confidence (%)	Effort (person-weeks)	Net Score
NL-Micro Check-Ins	10,000	3	80	4	6000
Nudge Scheduler	8,000	2	90	3	4800
Peer Circles	6,000	2	70	6	1400
Lite Coaching (Premium Add-On)	3,000	1.5	60	8	337.5

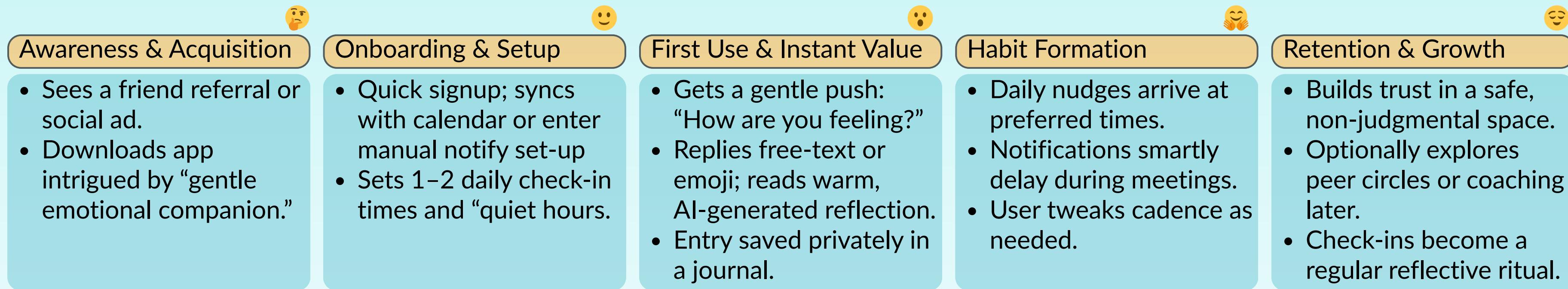
MVP Feature Selection

Based on the result of the solution prioritization exercise, following feature will be the part of Minimum Viable Product (MVP):

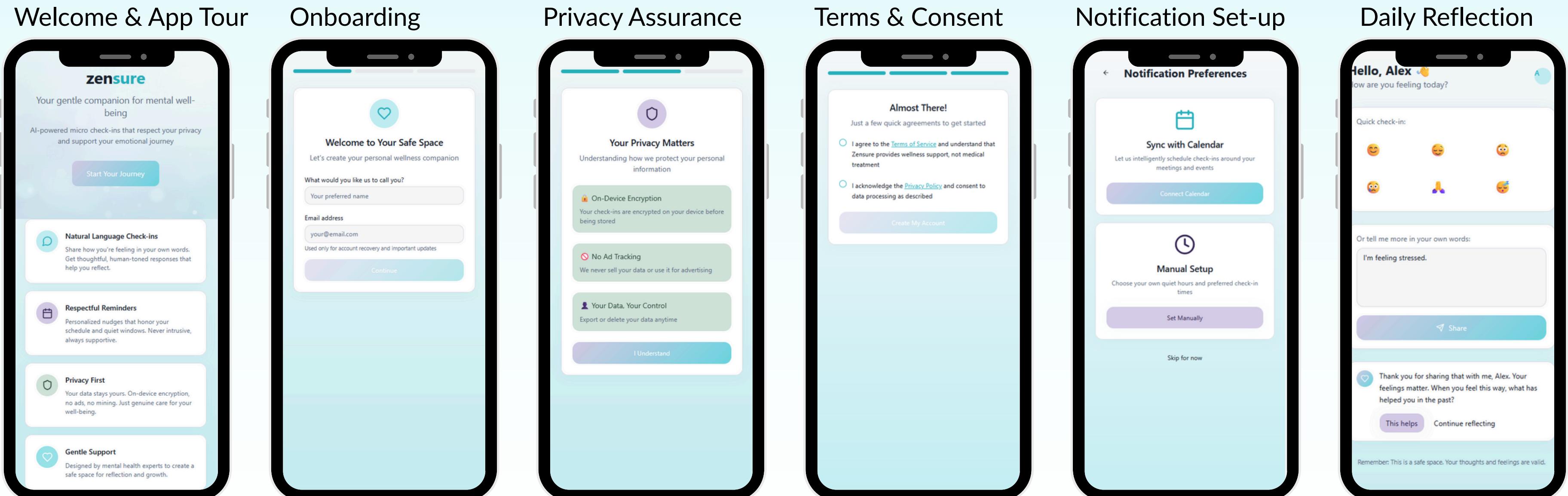
- NL-Micro Check-Ins (RICE 6,000): Core AI-driven reflection, adaptive prompts & journaling in one flow.
- Nudge Scheduler (RICE 4,800): Personalized, low-frequency reminders that respect users’ routines.

They form a simple habit loop—private check-ins plus timely nudges—for high impact with low effort.

User Experience Journey

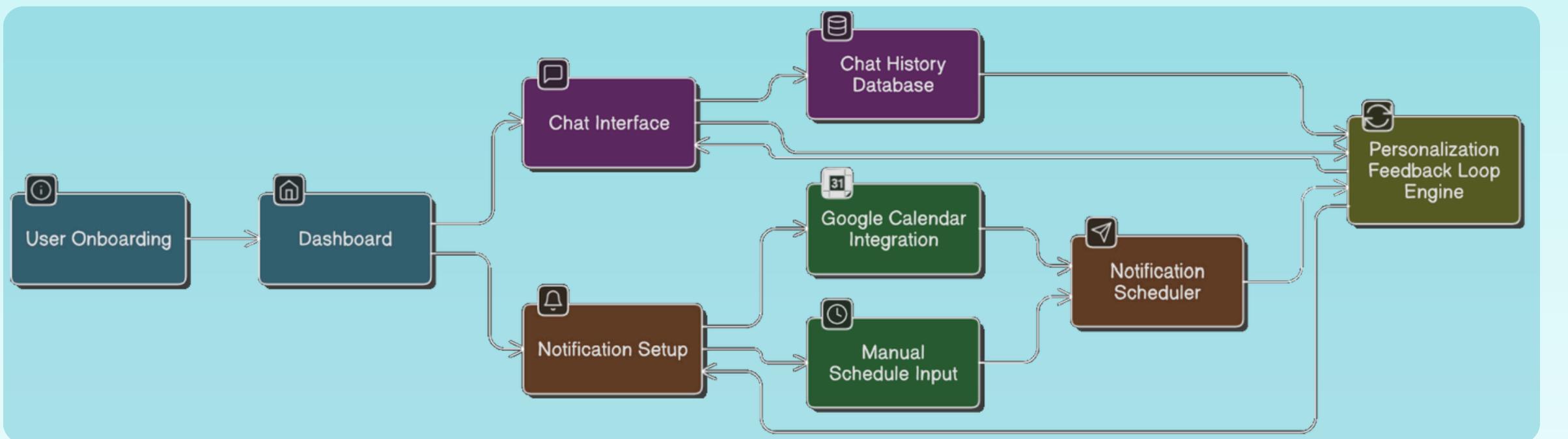


Wire-frames - How will the app look



Please find the link to the prototype [here](#)

System Design



Monetization Plan

Revenue Model	Offer	Risk	Mitigation
Freemium Core (MVP & post MVP)	Micro check-ins & smart nudges	High churn	2 min check-ins, multiple interaction options
Peer Circles (post MVP)	Small-group subscription (₹149–199/mon)	Privacy concerns	On-device encryption, no ads
Lite Coaching Boost (post MVP)	Bi-weekly coach check-ins (₹399–499/mon)	Competitive noise	Focus on micro check-ins + peer circles
À-la-carte (Later expansion)	15 min session credits (₹299–349)	AI inaccuracies	In-app feedback, model retraining
Corporate Wellness (Later expansion)	Enterprise license (₹999–1,499/emp/yr)	Low willingness to pay	Launch low-cost peer tier, test à-la-carte sessions

Success Metrics for the MVP

Leading Metrics	Leading Metrics
<ul style="list-style-type: none"> New sign-ups/week App visits/week Landing & referral CVR 	<ul style="list-style-type: none"> Organic vs. paid split Install→active conversion rate
<ul style="list-style-type: none"> Day 1 & Day 7 retention Session length & frequency Notification CTR 	<ul style="list-style-type: none"> DAU/MAU ratio 30-day churn Avg. session length

Distribution Model

Channel	Activation Strategy
App Store Optimization	Target “stress relief” & “resilience” keywords; seed 5★ reviews from beta users; PR outreach
In-app referral	“Give 2 friends a free bonus nudge” unlocks extra check-ins for both referrer and friend
Social Media	Partner with 5–10 niche wellness creators for 48-hr resilience challenges and exclusive codes