

FIRST SIX-MONTH READING · ARTIFICIAL INTELLIGENCE

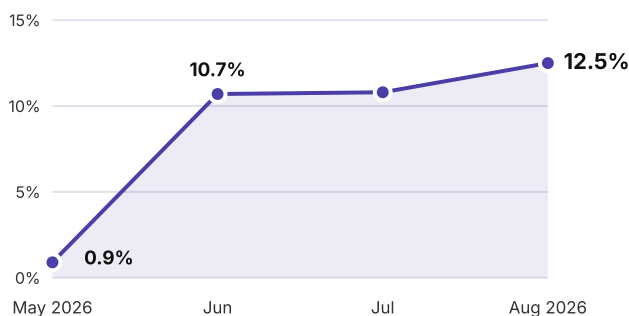
Indian AI brands account for 96% of AI brand responses

Task-specific Indian AI brands hold higher Buying Intent than global general-purpose AI brands. AI entered the Buying Intent Index as a category in May 2026, when under 1% of the monthly urban panel named an AI brand unprompted. By August, 12.5% did.

12.5% of respondents named an AI brand unprompted in August, from 0.9% in May	96% of AI brand mentions go to four Indian brands, in August and across the six months	Top 18% of all categories on Category Buying Intent in August, from the 65th percentile in May	29.1% of the AI category's Buying Intent is held by Murf AI, the leader in June, July and August
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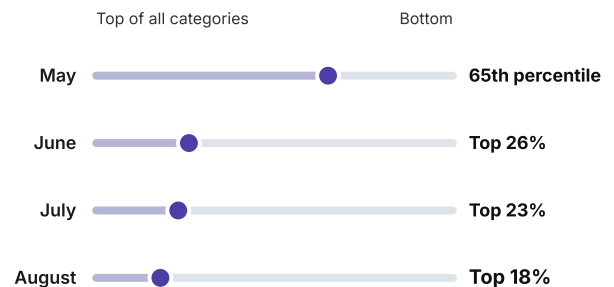
RESPONDENTS NAMING AN AI BRAND

Share of the monthly urban panel naming at least one AI brand, unprompted



WHERE AI STANDS AMONG ALL CATEGORIES

Position on Category Buying Intent; further left is stronger



WHAT THE SIX MONTHS SHOW

- **A category that arrived in one step.** Naming of AI brands went from 0.9% of respondents in May to 10.7% in June, then held and edged up to 12.5% by August. The number of AI brands named more than doubled over the period.
- **Specific jobs, not general assistants.** Voice generation, video creation, a mental-health chatbot and an Indian AI platform are what respondents name. ChatGPT and Google Gemini together hold under 4% of six-month AI mentions.
- **A clear leader, a close second.** Murf AI has led the category every month since June. In August its margin over Gan AI is relatively narrow.
- **Trusted for sincerity, wanted for standing.** Sincerity is the one trait that scores high each month. Emotional warmth is where AI brands are weakest.

“Analyzing 6-month Buying Intent data of AI category, the surprise is what people do not trust it for. The trust comes from the brands feeling easy to approach and from meaning what they say; sincerity is the one trait which scores high each month. On the desire side, people want AI as a way of staying current and socially capable. Emotional warmth is where these brands are weakest.”

Buying Intent Index, on the first six-month reading of the AI category

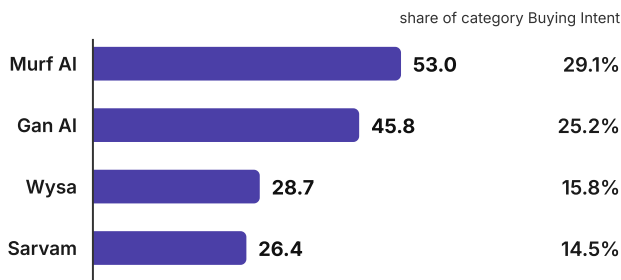
THE BRANDS

Four Indian brands carry the category

Murf AI led the AI category in August with a Buying Intent Index of 53.0, followed by Gan AI at 45.8, Wysa at 28.7 and Sarvam at 26.4. Between them the four hold 84.6% of the category's Buying Intent; five further brands (Google Gemini, Anthropic, ChatGPT, Kint and Meta AI) share the remaining 15.4% and sit far below the four.

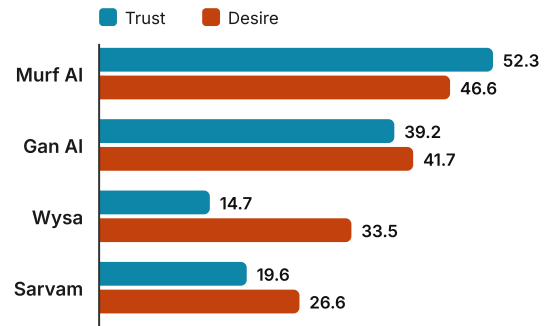
BRAND BUYING INTENT, AUGUST 2026

Brand index scale, with each brand's share of AI category Buying Intent



TRUST AND DESIRE BEHIND THE INTENT

Brand index scale, August 2026



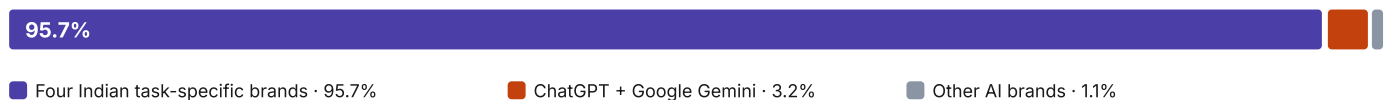
CATEGORY ORDER BY MONTH

	JUNE	JULY	AUGUST
1	Murf AI	Murf AI	Murf AI
2	Gan AI	Sarvam	Gan AI
3	Wysa	Gan AI · Wysa (level)	Wysa
4	Sarvam		Sarvam

READING THE TWO CHARTS

Murf AI is the most evenly built of the four, with Trust and Desire close together. Gan AI is similarly balanced, a step behind. Wysa and Sarvam are Desire-led: people want them more than they yet trust them, the usual shape of a young brand with a clear promise.

WHO GETS NAMED: SHARE OF ALL AI BRAND MENTIONS, MARCH TO AUGUST 2026



THE FOUR BRANDS

Murf AI

VOICE GENERATION

Category leader for three straight months. Trust 52.3 and Desire 46.6 in August, the strongest on both.

Gan AI

VIDEO CREATION

Second in August at 45.8 and the closest challenger, with 25.2% of category Buying Intent.

Wysa

MENTAL-HEALTH CHATBOT

Third at 28.7. Desire (33.5) runs well ahead of Trust (14.7).

Sarvam

AI PLATFORM

Fourth at 26.4 in August after placing second in July. Desire 26.6, Trust 19.6.

WHAT IT MEANS FOR MARKETERS

Task beats breadth

Respondents name AI brands that do one job well. A specific promise is what earns a place in the consideration set.

Sincerity is the asset

It is the one trait that scores high every month. Protect it before building anything else.

Competence has to be shown

It ranks behind closeness as a source of trust in AI, so it must be demonstrated, not claimed.

Emotion is open ground

Emotional connection is the weakest pull in the category. No brand has yet taken it.

HOW AI BRANDS ARE SEEN

Trusted for sincerity, wanted for standing

The Buying Intent Index reads every brand on 22 behaviours, ten that build Trust and twelve that build Desire, grouped into three Trust and four Desire families. Pooling every AI brand mention from March to August gives the category's own profile.

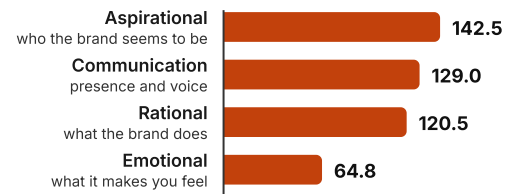
WHAT BUILDS TRUST IN AI BRANDS

Trust families, six months pooled, brand index scale



WHAT BUILDS DESIRE FOR AI BRANDS

Desire families, six months pooled, brand index scale



THE CATEGORY'S IDENTITY, SIX-MONTH READ

Aspirational Insider

In the Trust and Desire framework a brand's identity is set by its leading Trust family and its leading Desire family. For AI those are ease and closeness (163.3) and aspirational appeal (142.5): a brand that invites you to be your better self through closeness.

Trust anchor: Display of Empathy. **Desire pull:** Social Maturity. People relate to AI brands as an easy, familiar presence, not an authority, and want them as a mark of being current. A first read of a young category; it will firm up as the category grows.

Trusted the way a friend is trusted; wanted as a way of being on the inside of what comes next.

The twelve identities: leading Trust family (rows) by leading Desire family (columns)

	EMOTIONAL	RATIONAL	ASPIRATIONAL	COMMUNICATION
EASE AND CLOSNESS	Empathic Friend	Practical Partner	Aspirational Insider	Voice of the People
POSITIVE INTENT	Sincere Healer	Conscious Steward	Moral Champion	Authentic Storyteller
COMPETENCE	Trusted Companion	Industry Standard	Heritage Authority	Confident Communicator

THE SEVEN LEADING BEHAVIOURS, AND HOW AI DIFFERS FROM THE REST OF TECHNOLOGY

The strongest behaviour in each family, six months pooled. Technology at large leans on competence and winning attributes; AI on responsibility, sincerity and social maturity.

FAMILY	AI CATEGORY LEADS WITH	REST OF TECHNOLOGY
● Ease and closeness	Display of Empathy Seems to care, listen and relate	Shared Interests
● Positive intent	Demonstrated Sincerity Visibly principled; a lead trait each month	Corporate Altruism
● Competence	Accepting Responsibility Owns its outcomes and decisions	Perceived Competence
● Emotional	Feeds Hope Gives people something to hope for	Emotional Maturity
● Rational	Conscious Efforts Works visibly hard; rigour and effort	Conscious Efforts · shared
● Aspirational	Social Maturity Humble, dignified, mature in conduct	Winner's Attributes
● Communication	Believability Inspires trust as a desirable trait	Oration

ABOUT THIS READING

The Buying Intent Index by TRA Research is a monthly measure of consumers' keenness to buy, covering more than 2,000 brands. It combines Trust and Desire into a forward-looking view of buying propensity. The survey is conducted face-to-face with peer influencers across 16 Indian cities, who name brands unprompted against the 22 behaviours. Buying Intent measures keenness to buy; it does not measure transactions.

Brand figures are on the brand index scale (brand universe, April 2025 = 100). Category standing compares AI with every category tracked that month. The behaviour profile pools all AI brand mentions from March to August 2026. Media queries: www.buyingintent.in.