

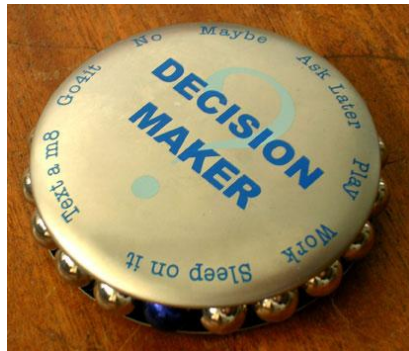
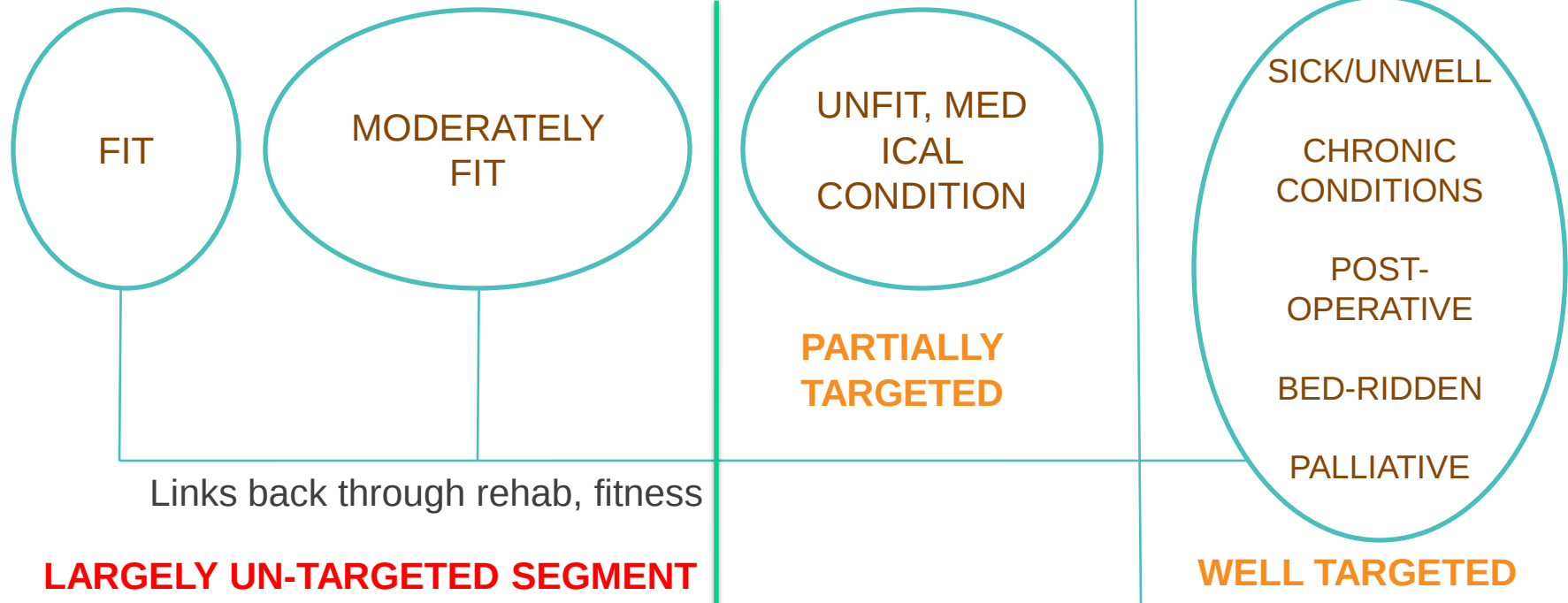


PORTEA
HEAL AT HOME

A Study on market feasibility for Wellness in Home healthcare setting

Introduction (1/3)

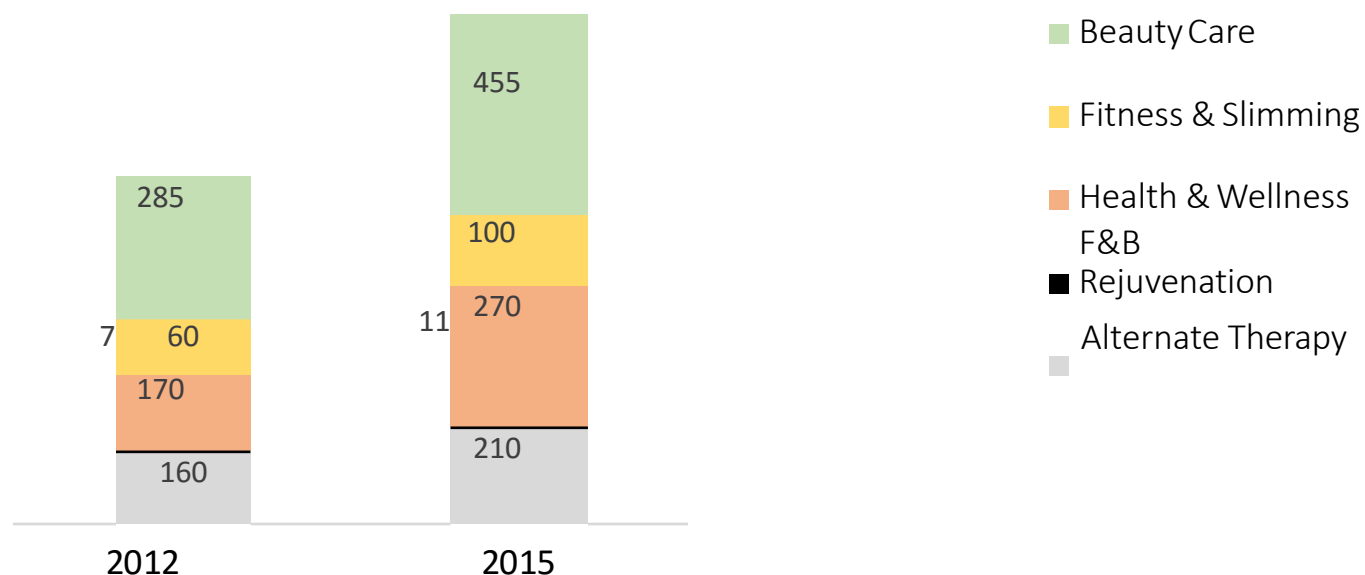
HEALTH STAGES



The decision maker while purchasing a Portea offering also largely belongs to the first category, meaning we don't offer a great deal of targeted, long-term services to him/her

Introduction (2/3)

Market Size of Wellness (2012-15, India, INR bn)



1. **Fitness accounts for 67%** in Fitness & Slimming
2. Estimated CAGR of 23%
3. Currently **highly fragmented segment** with unorganized fitness center, niche segment (food, fitness, tech) providers and aggregators

Introduction (3/3)

Covers a **broader base of customers**

Has a customer to coach ratio of **300:1**



Technology based product back-bone making it easy to scale, monitor and execute

Possibly the segment which fast tracks Portea's **90k to 9 lac** customer acquisition story

Completes Portea's offerings to **create a consumer-centered healthcare brand**

Research overview

The research is divided into three verticals –

1. General awareness about wellness- Diet and Activity Tracking
2. Self Health Monitoring
3. Disease Management

Research Objectives

- 1) To explore the consumer insights and perception across all three verticals
- 2) To analyze the current trend across all three verticals
- 3) To understand the factors that can affect the frequency of exercising or activity to ensure fitness.
- 4) To evaluate pros and cons of different approaches available in market for tracking health and activity.

Methodology

Study Type –The study type is cross sectional descriptive.

Sampling method – *Convenient sampling*. With the sample size of 100 in each city, a survey was conducted to understand the consumer insights across all three verticals

Study Participants: The research has been conducted in Bangalore, Mumbai and Delhi. Respondents were in the age group of late 20s to 50s, both males and females, from urban background. People from various professional and corporate backgrounds were also interviewed to gather insights.

Study Technique – Administration of primary questionnaire with few common questions and three subsets catering to the three verticals. In depth interview of 15 people for 25-30 minutes each, to understand the factors that can affect the frequency of exercising /activity to ensure fitness)

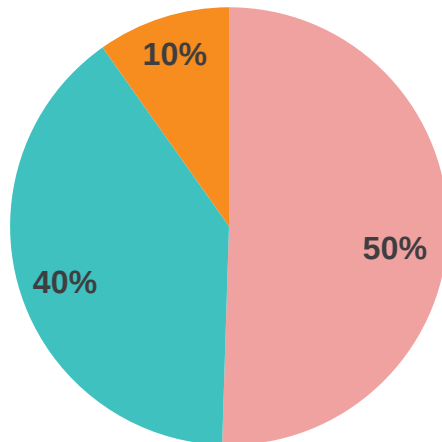
Data analysis – Done with the aid of MS-Excel sheets. The data was entered in sheets and then analyzed with the help of graphs.

Data Analysis

General Awareness about Healthy lifestyle: Diet and activity tracking

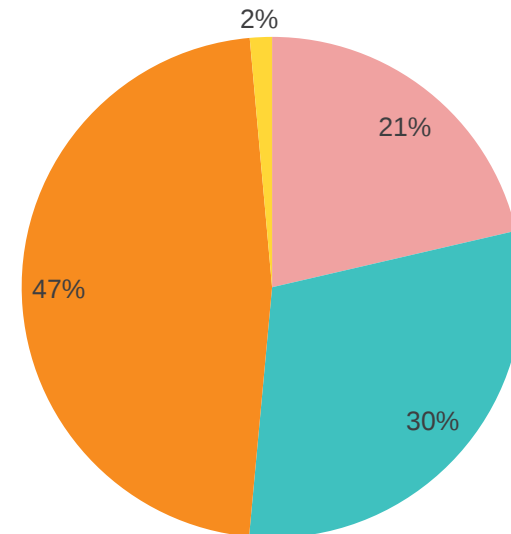
What will contribute most to you leading a long and healthy life?

- Eating the right food/diet
- Regular Exercise
- Regular Health Monitoring



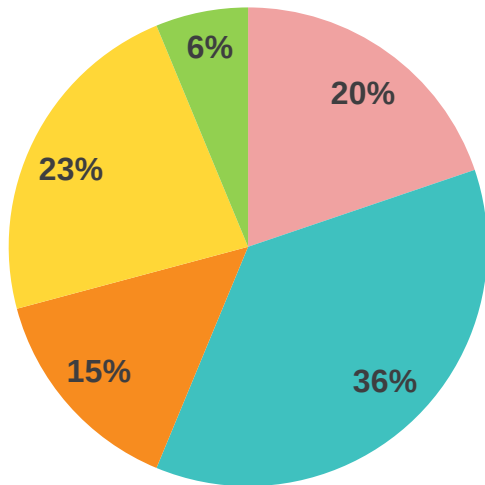
Best way to keep track of daily activities and diet

- Technology Devices
- Mobile Applications
- Personal Consultation
- Other



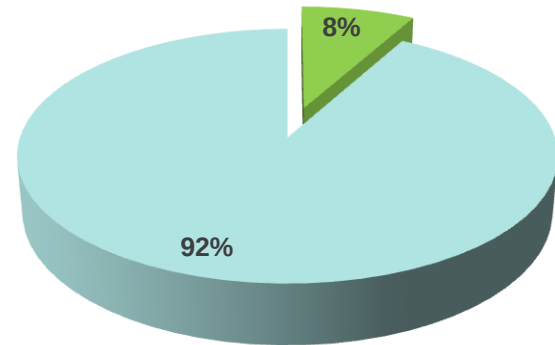
Best way to avoid Health Issues

- Regular checkups
- Quick Diagnosis
- Health Insurance
- Eating Healthy Food
- Exercising/Fitness Work

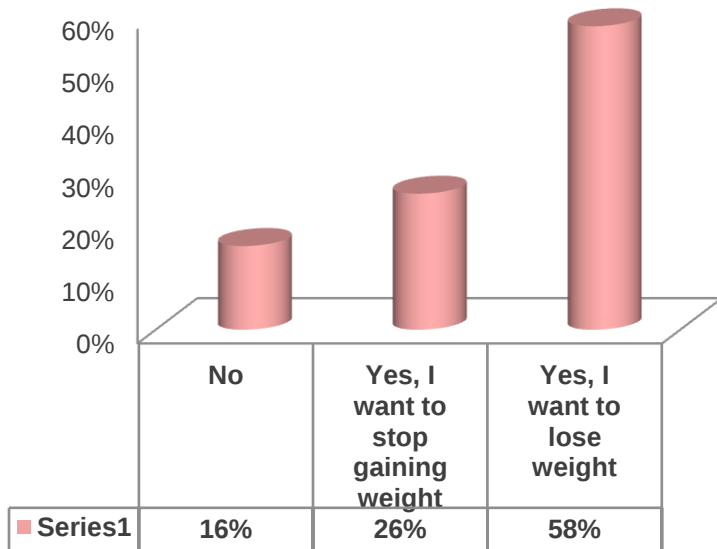


Are you following a special Diet to be healthy?

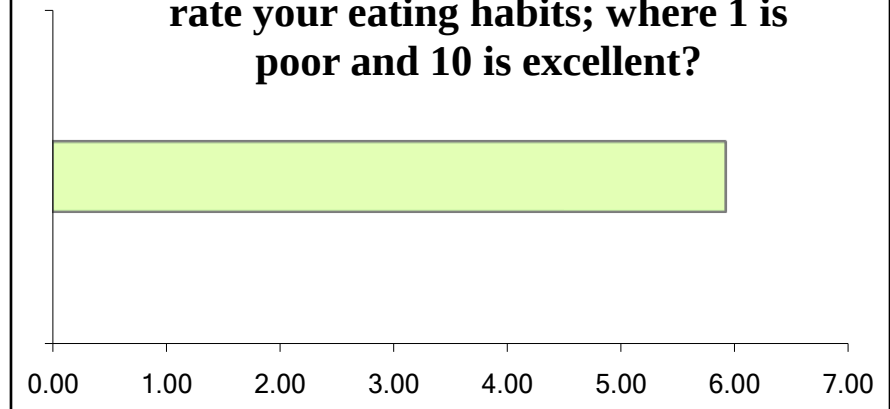
- Yes
- No



Do you want to lose weight?

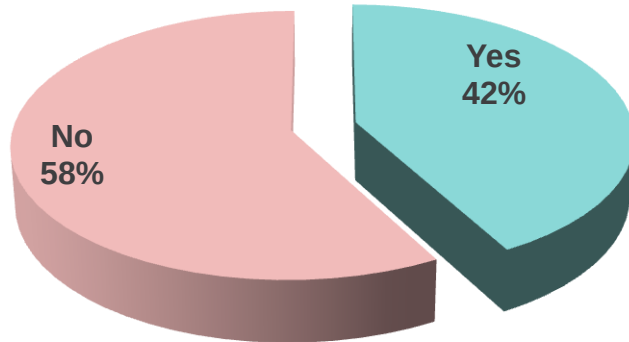


On a scale of 1 to 10, how would you rate your eating habits; where 1 is poor and 10 is excellent?

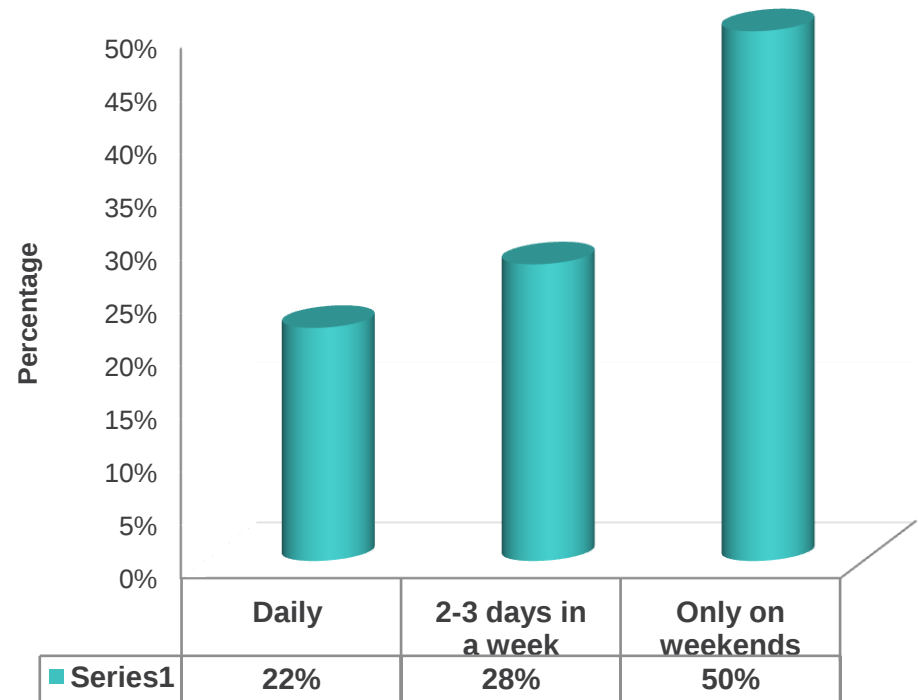


Inference: Maximum respondents rated their eating habits as 5 or 6 when asked on a scale of 1-10. The mean score therefore was calculated as **5.92**.

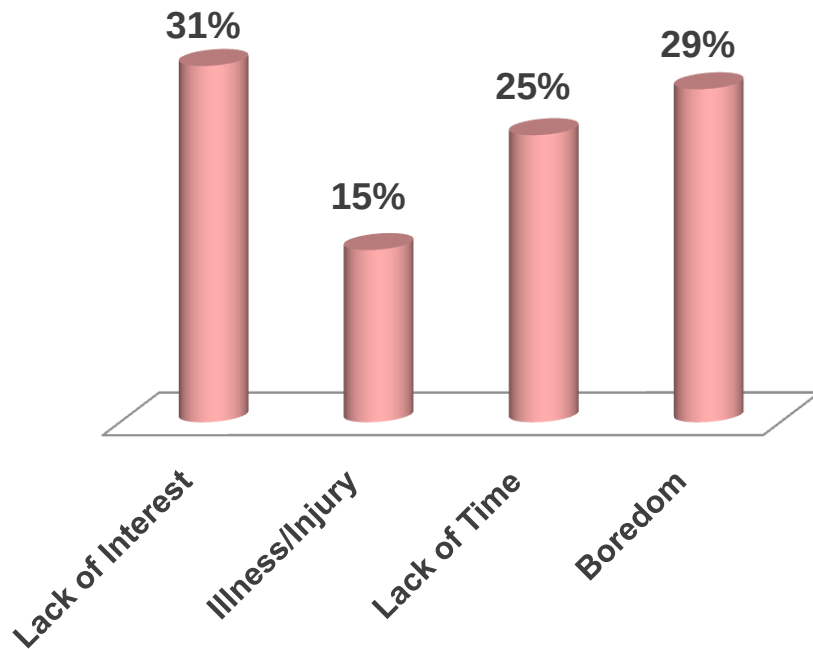
Do you currently Exercise?



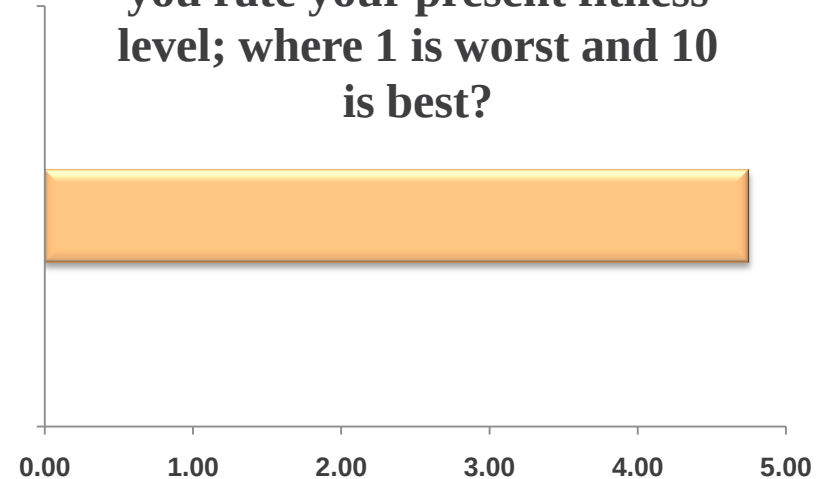
How frequently do you exercise?



Reasons of not exercising frequently



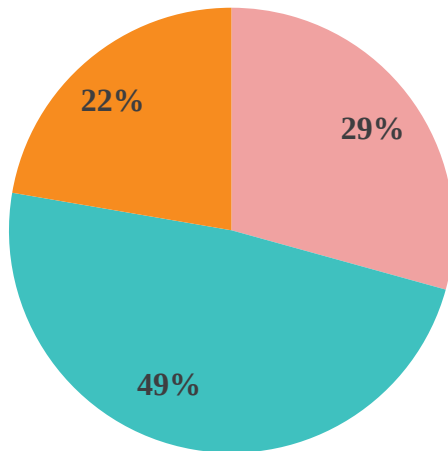
On a scale of 1-10, how would you rate your present fitness level; where 1 is worst and 10 is best?



Inference: Maximum respondents rated their fitness habits as 4 or 5 when asked on a scale of 1-10. The mean score therefore was calculated as 4.45

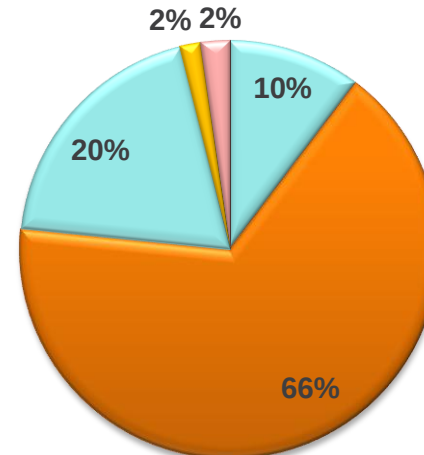
Health Monitoring Tendencies

- Regular Checkup
- Only on Doctor's Advice
- Only when seriously ill



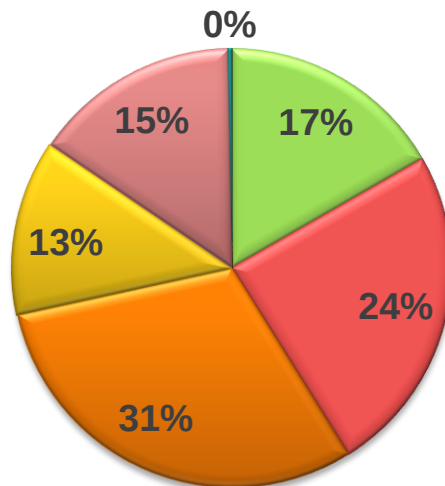
Openness Towards Using healthcare technology/apps for Health monitoring

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree



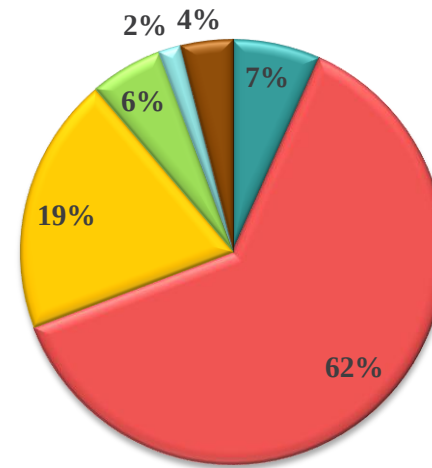
Concerns Regarding use of technology in Self-health monitoring

- Intrusive
- Accurancy
- Costs
- Complicated to use
- Portability
- Other



Credibility Factors for using healthcare technology for Disease Management

- Family/Friend's Recommendation
- Doctor's Recommendation
- Certifications
- Device's Manufacturer
- Online Reviews/Media Reviews
- Other



Qualitative analysis: Participants



Sporty & Athletic The Fit Category

20-45 yrs

Students &
Professionals

Extremely Self-
Disciplined



Health & Fitness Oriented The Moderately Fit

25-50 yrs

Mid-to-senior level
professionals, housewiv
es, business community

Health conscious and
have a strong desire to
maintain balance in life



Pressured The Unfit Category

30-55 yrs

Unused to exercise and
staying fit doesn't come
naturally

Stamina
problems, possible
disease conditions

What is the approach to fitness? (1/2)

Men	FIT	MODERATELY FIT	UNFIT
MOTIVATION	1. Not working out makes me feel dull	1. Feeling good about myself 2. Can work all day without tiring	1. Feeling good about myself
TRIGGER	1. Guilt from eating unhealthy and work pressure	1. Guilt from eating unhealthy	1. Guilt from eating unhealthy 2. Feeling depressed or lonely
BENEFIT	1. Having fun with the activity and appreciation by peers	1. Having fun with that activity 2. Being able to wear the latest fashion trends	1. Having fun with that activity 2. Looking great and feeling confident
HEALTH GOALS	1. Higher stamina 2. Body strength 3. Higher immunity	1. Higher stamina 2. Body strength 3. Higher immunity	1. Higher stamina 2. Body strength 3. Weight loss
BARRIERS	1. Erratic schedules 2. Boredom 3. Eating/drinking->unfit->demotivated cycle	1. Erratic schedules 2. Eating/drinking->unfit->demotivated cycle 3. Laziness	1. Eating/drinking->unfit->demotivated cycle 2. Erratic schedules 3. Laziness
SUPPORT GROUP	1. To meet new people 2. To discuss fitness hacks/progress	1. For motivation to perform better 2. For the company during the actual activity	1. For the company during the actual activity 2. For motivation to perform better
DIET	1. Health supplements 2. Healthier alternatives	1. Incorporate nutrients into diet 2. Eat light (soups/salads)	1. Addicted to taste 2. Try to regulate meal portions

What is the approach to fitness? (2/2)

[Go Back](#)

Women	FIT		MODERATELY FIT		UNFIT	
MOTIVATION	1.	Feeling and staying attractive	1.	Feeling less insecure about my body	1.	Feeling good about myself
			2.	Can work all day without tiring		
TRIGGER	1.	Guilt from eating unhealthy	1.	Guilt from eating unhealthy	1.	Guilt from eating unhealthy
			2.	Feeling depressed or lonely	2.	Feeling depressed or lonely
BENEFIT	1.	Being able to wear the latest fashion trends	1.	Looking great and feeling confident	1.	Looking great and feeling confident
			2.	Having fun with that activity	2.	Having fun with that activity
HEALTH GOALS	1.	Weight loss	1.	Higher stamina	1.	Higher stamina
	2.	Agility	2.	Higher immunity	2.	Weight loss
			3.	Weight loss	3.	Higher immunity
BARRIERS	1.	Erratic schedules	1.	Laziness	1.	Erratic schedules
	2.	Travelling job	2.	Erratic schedules	2.	Laziness
			3.	Eating/drinking->unfit->demotivated cycle	3.	Eating/drinking->unfit->demotivated cycle
SUPPORT GROUP	1.	For the company during the actual activity	1.	For motivation to perform better	1.	For motivation to perform better
	2.	To meet new people	2.	For the company during the actual activity	2.	For the company during the actual activity
DIET	1.	Stay off fatty and processed products	1.	Incorporate nutrients into diet	1.	Addicted to taste
			2.	Eat multiple smaller meals	2.	Try to regulate meal portions

Analysis - fitbit

Pros

- It is considered very cool and sporty, so people want to wear it all the time
- It has long battery life so no hassles of charging every now and then
- The analysis reports helps users keep a track of their health and also evokes a sense of realization if the reports are not as per their expectations
- People really like the look and design of Fitbit especially in the black colour

Cons

- The device helps in realization but users do not understand what should be the remedial measures to see effective results at the earliest
- A lot of users do not really care about wellness but wear it because Fitbit is more of a style quotient in India and considered upmarket
- Due to its high price, a lot of duplicate copies have found a space in the market

Core Insight

Users like to wear a device like Fitbit as it not only looks good but helps them in keeping a track of their health status. But they stop wearing it after a while because they do not know the remedial measures and they try and exercise by themselves but considerable results are not visible

Analysis - CLASSVERSE

Pros

- It follows a very unique business model where the user pays a monthly fee to Classserve and can take a class their different partner centers everyday. These partners include gyms, kick boxing, zumba, aerobics etc
- People find this idea really attractive because it gives them autonomy and control over the trial options available
- The company ties up with these centers and in exchange of driving customers to their stores they demand limited free trials per user

Cons

- People are looking for a trial but just for a fortnight or a month so the customer life cycle is really short and after a month or two they join one of the center and Classserve's revenue from that user stops

Core Insight

This concept is a blue ocean in the industry but the sustainability of the business is still in doubt. The trial feature for different options is a good way to attract people to try the services but then the services should be offered by the company itself so that the customer revenue can be made long lasting

Analysis - trackmybeat

Pros

- It is a good mix of product and service offering where the product is dominant and is really effective in monitoring daily activity, the service is a minor part though which includes some basic consultation
- The reports and data analytics given by the device is relevant to the user and gives out key information which can help the user keep a track of fitness levels

Cons

- There devices are very old fashioned and look like the traditional pedometers which does not catch much attraction towards youth
- It provides lots of relevant data but the next step post that which is mentoring is not that great, the consultation is very basic and there is no regular tracking to ensure maintenance of fitness levels

Core Insight

A service like trackmybeat can be really effective in creating demand as the data provided is relevant but it lacks a few things which people are looking for, actionable time to time guidance/coaching with regular tracking to ensure fitness levels are maintained and a user-friendly and appealing design of the device

Pros

- The service allows user to set their fitness goal, track and measure daily progress and get constant guidance from experts through mails and phone
- It has a unique feature where on the app users can just enter the food item they ate and specify the portions, it will provide the calories intake
- Also, the users can enter the exercise they did and the duration, the app will automatically subtract the calories burnt from the calorie meter
- Users really like the fact that they can monitor their daily calorie count and get guidance

Cons

- According to users, one thing this service lacks is a physical device to track progress. They believe that a mobile app might not give the best results as compared to a wearable device which is attached to the body all the time

Core Insight

People are looking for a service exactly like this where they can understand data in the way they understand, calories intake and burnt, but they also do not want to enter so much details and especially details about their exercise because there are chances of human error and a scientific device can avoid that

Analysis -



Pros

- It is a great mix of fitness tracking and implementation, what every consumer is looking for, and has both the device and coaching services available
- A new concept of Karma Points which the user earns on achieving targets
- It is building a community of fitness enthusiasts in order to build an ecosystem
- It has good corporate tie ups which are a source of bulk institutional revenues

Cons

- It has virtual training only and no in home services which a lot of customers are looking for as they feel they need constant supervision
- The coaching involves just tips and Do's and Don'ts over phone and mail but an option for proper exercise training is still missing

Core Insight

People are looking for a device and coaching along with it because here promotion is not enough, education has to go hand in hand with it. Also, having the right product and service like Goqii is not enough, delivering the service as per user's unarticulated needs is important (Eg: pre recorded animated workout sessions with music beats)

Analysis - UrbanPro

Pros

- Companies like these are market aggregators and provide all sorts of fitness trainers at the user's convenience
- People who do not want to travel to the gym and are looking for personal training as they believe they need individual supervision are generally their target market
- It is hassle free, the user can just book an appointment on a click
- The users can switch the trainer if they are not comfortable or satisfied

Cons

- Personal trainers once hired fix up a daily time for their visit, the lack of flexibility of rescheduling becomes an issue and users end up on cancelling a lot of sessions
- Personal trainers are really expensive as compared to fitness trainers, also the user has to invest money in buying the all sorts of equipment needed

Core Insight

People do really prefer personal in home training but are looking for inexpensive options. Also, people are looking for a service which is flexible and the time is not fixed for the month so that they can reschedule

Gaps and what works well in the market?

	THE FIT	MODERATELY FIT	THE UNFIT
What works well	Working out with someone at a higher fitness level motivates them to do better Learning new sports provides a new challenge	Learning new tricks like self-defence, salsa Fitness apps that help in disciplining diet/exercise Good groups and fun factor	Personal trainer for those with no prior love for exercise Watching old people working out boosts confidence Rude shock routines to jolt you out of the unfit cycle
Gaps that exist	Don't always find motivated and adequately pro-level partners to exercise with Activities get boring and variety is lacking Work pressure reduces motivation to exercise	Space constraints mean cycling, running etc. is impossible Mismatch of schedules Need guides for new activities (eg. trekking/marathon) Reach a plateau with exercise routines	Most apps are self-motivated and they feel that their small wins are not celebrated Flexibility is less and a custom approach is preferred Diet fads don't seem to have much impact
Go to	10%	60%	25%

Conclusion

- Based on the results and findings of the research, it can be iterated that consumers are fully aware of the benefits achieved by practicing healthy lifestyle and are indulged in some activities like diet tracking or exercising to stay fit and healthy.
- The study also stated that with home care currently focusing only on certain health conditions that include respiratory therapy, home infusion therapy, rehabilitation services, tele-health, etc; a *wellness initiative* is required that focuses on preventing chronic diseases within the eases of our home.
- With the similar view point the researcher evaluated different approaches currently available in the market to track health and activity that can help to build an end to end Wellness offering in context to preventive health care.

Recommendations

An end to end, community – led Wellness product offering:

Product overview:

1. Technology based product back-bone making it easy to scale, monitor and execute
2. Covers a broader base of customers as according to the study results, 70% of the consumer's lies in fit to moderately fit health category.
3. Completes Portea's offerings to create a consumer-centered healthcare brand
4. Possibly the segment which fast tracks Portea's consumer acquisition story

Consumer Psychological Profiling

FIT

Boredom

Exercise habit

Pro-level partners

Euphoria

High stamina

Challenge

Convenience

Skill building

Flexible

New-age

Fun

Weight plateau

Fashion-conscious

**MODERATELY
FIT**

Positioning

[Go to](#)

Wearables and Apps

GoQii

FitBit

TrackMyBeat

GetActive

Community-led, End-to-end, personalized wellness

**PORTEA
ACTIV**

Diet Plan focused

FitHo

HealthifyMe

Marketplace/Aggregators

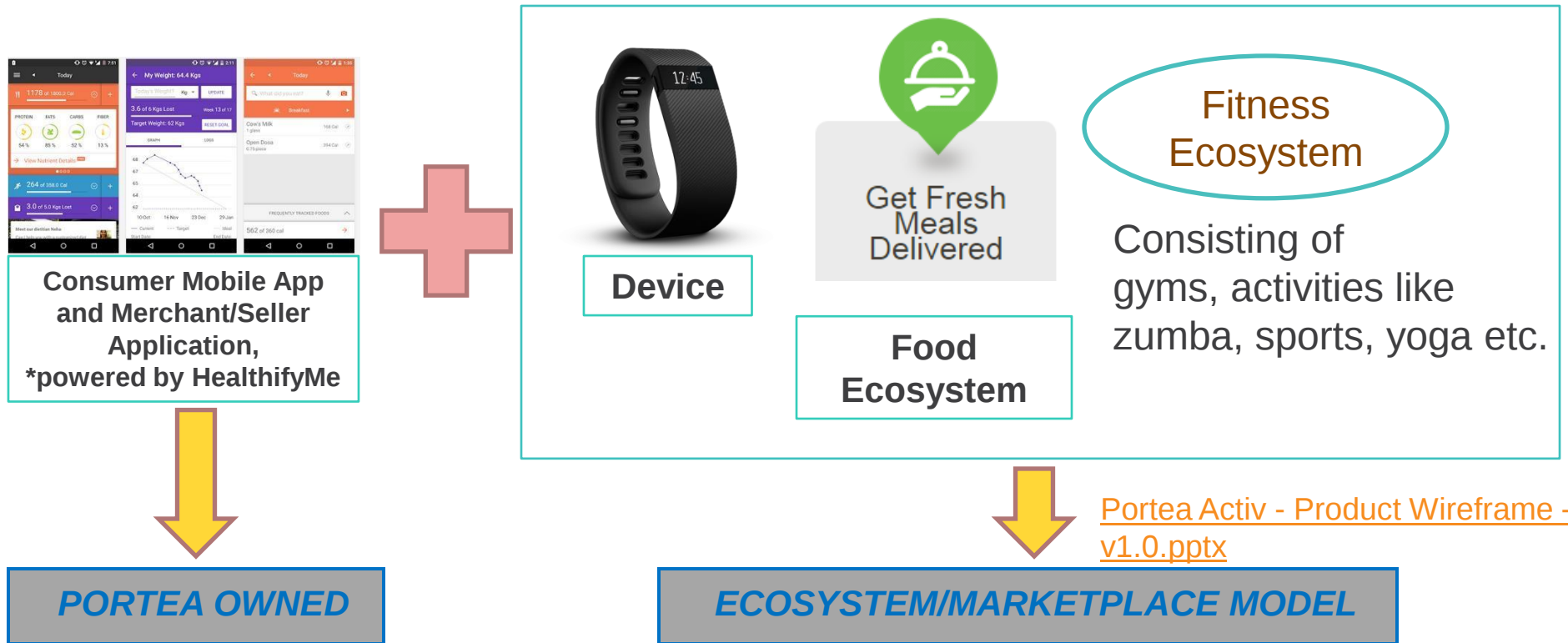
Orobind

Urban Pro

ClassVerse

LocalOye

PORTEA-ACTIV – Concept and Working



Drivers

Convenience

Community

Zero Boredom

End-to-end

Personalization

Continued Engagement

Different

PORTEA-ACTIV – Differentiators

1

Key Differentiators

- **End-to-End** Offering
- **Unbundling** of Services Offered (Pay per use), ex: iTunes
- **Community-driven** approach driving engagement
- More options/alternatives (**Aggregator/Marketplace** model)

Advantage:

- The model offers a great opportunity to **connect businesses within Growth Story**

2

Is PORTEA-ACTIV difficult to replicate?

- Need a strong customer base to **build a strong workable ecosystem/marketplace**
- Creating **completeness** of offering is difficult
- Getting **customer** signups through **B2B channel** is challenging for a new entrant



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Thank you