

# Emoha Elder Care

Re-Imagining Elder Care



Elder App



Events



Activities



Convenience



Safety



Emergency



Health



Nurses



Doctors



Physio



India Elder Population  
(2019 – 2050)

**110 m - 320 m**

% of population **8% - 19 %**

Life Expectancy  
(1990-2019)

**68-78y**

Male / Female  
Life Expectancy

**66y/70y**

Urban Elder  
Population

**36 m**

Elders Living  
Independently

**15 m**

Dementia  
Cases

**4 m**

Elders needing  
specialized care

**27 m**

**56%**

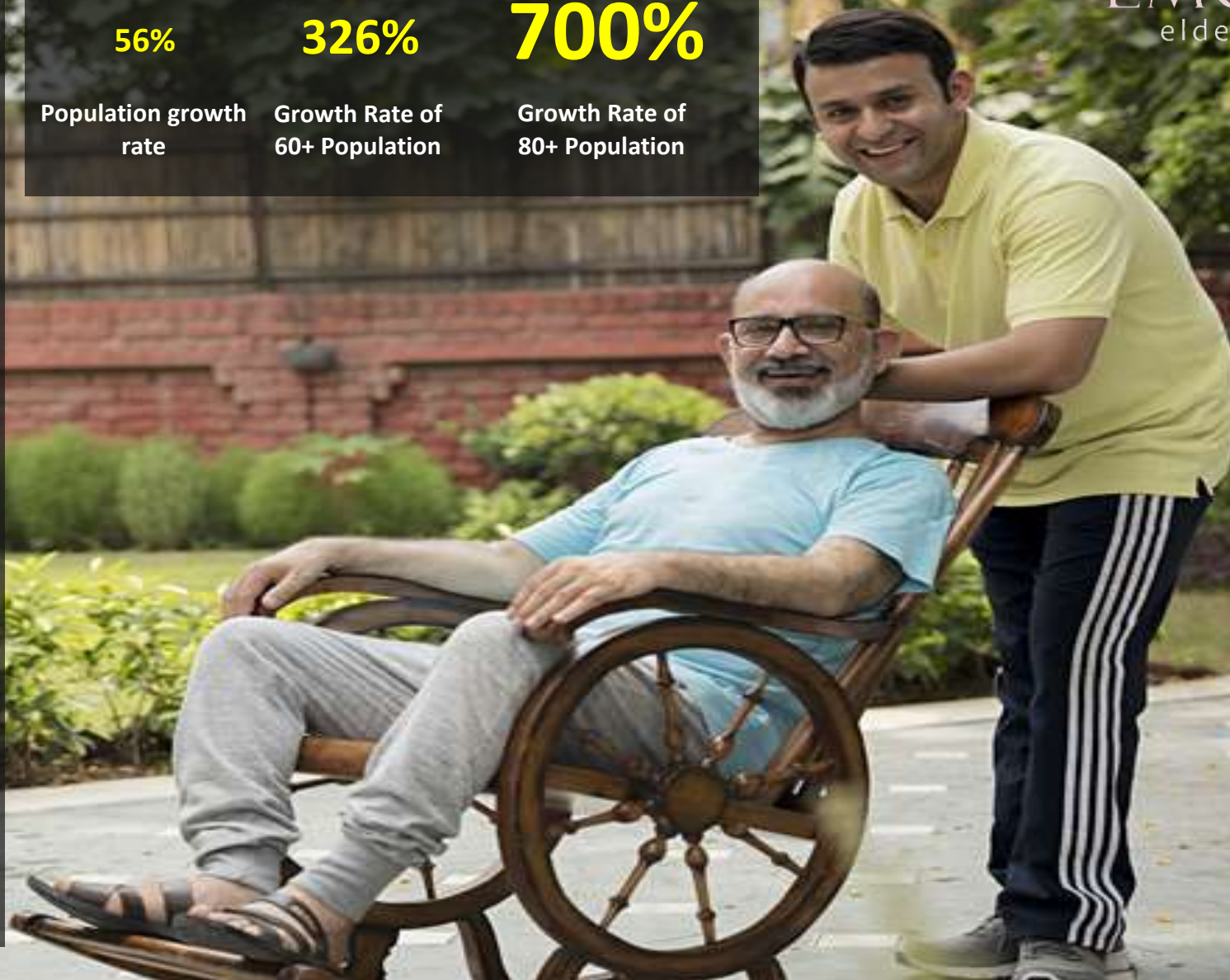
Population growth  
rate

**326%**

Growth Rate of  
60+ Population

**700%**

Growth Rate of  
80+ Population





# ELDER'S LIFE TODAY: DAILY HASSLES | DISCONNECTED LIFE

In India alone **110 million elders** are leading a **vulnerable & disconnected** life

## EMERGENCY

**1** No Emergency  
Response System



No 911 emergency  
response system  
No online medical records  
Late detection due to  
elders staying alone

## HEALTH

**2** Poor Health  
Monitoring



Transactional approach to  
health monitoring  
Multiple comorbidities  
Rise of chronic conditions

## SAFETY

**3** Concerns About  
Safety



High exposure to crime  
and hazards  
Absence of home safety  
systems  
Homes and cities not  
designed for elders

## ENGAGEMENT

**4** Loneliness  
Epidemic



Dwindling social support  
systems & nuclear families  
Lack of elder friendly  
spaces  
No support groups

## HASSLES

**5** No Trusted  
Support System



Increasingly complex  
hassles of daily life  
Lack of trusted service  
providers  
Fast changing technology

**Urgent need to have an integrated *elder care operating system* enabling elders to age comfortably**

## INDIA LANDSCAPE: Rs. 26,000 Cr MARKET SEGMENT – GROWING AND DISCONNECTED

Fragmented & Unregulated

Limited Technology

Lack of Elder Care Expertise

Majorly Real Estate

### MOVE IN – SENIOR LIVING

4000 elders, INR 1500 Cr



Move-In (1-2%)

### STAY IN – HOME ELDER CARE

350,000 elders, INR 7500 Cr



Stay at home

### STAY IN – HOME HEALTH

350,000 elders, INR 15,000 Cr



Other Chronic Care (20%)

### MOVE IN – AL / MC CARE

18,000 elders, INR 2000 Cr



Assisted / Memory Care (12%)

Emoha Focus

Offering elders and their children long-term **assurance** for seamless **continuity of care** as conditions evolve..

## **TEAM – VISION - PHILOSOPHY**

## FOUNDING TEAM: ELDERPRENEURS | THINKERS | SONS & DAUGHTERS..

A founding team of entrepreneurs with deep elder care expertise across functions..

But most importantly, sons and daughters..

with a shared dream and a common passion..

“Elders”



### SAUMYAJIT ROY

CEO & CO-FOUNDER

DESIGN. DOMAIN. TECH.

Ex-JLL, Antara, SPA, Indian School of Business  
Co-Chair & Founder CII Task Force on Senior Care



### CAPT. (IN) HARSH SINGH (Retd)

COO – HOME HEALTHCARE

OPERATIONS. SKILLING. SYSTEMS

Indian Navy, Elder Care Entrepreneur



### SAMA BÉG

CHIEF PRODUCT & QUALITY OFFICER

PRODUCT. PROCESSES. QUALITY. LEARNING.

Ex-Brooks Rehab., US; University of North Florida



### VIBHOR MAGO

CHIEF OF STRATEGY

STRATEGY. M&A. GROWTH. FINANCE

Lumis Partners, Ex-EY. University of Exeter.



### NEHA SINHA

HEAD – EPOCH ELDER CARE

MEMORY CARE. ASSISTED LIVING

Epoch Elder Care. Dementia Specialist  
Partner - Swedish Care International



### Dr MANREET KAHLON

CHIEF - CUSTOMER RELATIONSHIPS

CLINICAL CARE. CARE ENGINE

Dentist, Elder Care Entrepreneur



### HEMAL BHATT

CHIEF GROWTH OFFICER

ALLIANCES, PARTNERSHIPS, GROWTH

Indian Army, Ex Founder Affordplan, OLA,  
TaxiForSure, IL&FS, IIM Indore



### RICHA CHANDRA

HEAD – HUMAN CAPITAL

TEAM DEVELOPMENT, HR

Mahindra, Max Bupa, Healthcare at Home,  
MBA HRM

## FOUNDING PHILOSOPHY: PLATFORM DESIGN PRINCIPLES

### Platform Design Principles

We are not transactional – **we own the elder's home**

We are not “operations shy” – seamlessly **blend physical and digital**

We understand elders – serve across the **continuum of care**

We enable active aging – balancing **clinical and social needs**

Eldersfirst approach & Care  
Ethos

Technology and  
Analytics

Deep Domain  
Leadership

Globally  
Benchmarked

Foundation Blocks





**EMOH-A | A-HOME**

## — VISION —

**To be the India's largest community-based care continuum for elders**

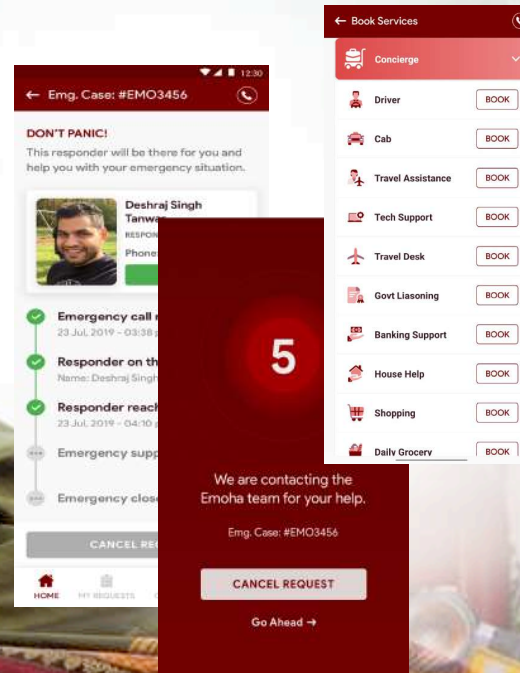
## — MISSION —

**Create the most comprehensive elder care platform**

## — GOAL 2025 —

**1,000,000 elders**





## **PRODUCT AND BUSINESS MODEL**

# CONTINUUM OF CARE: PRODUCTS COMPUTING AND READY TO SCALE

**Independent Elders**  
(INR 1,000 p.m.)

**Mid-care Elders**  
(INR 6 – 50k p.m.)

**Specialised Needs Elders**  
(INR 1,10,000 p.m.)

**empower**<sup>TM</sup>  
care plan

**Monthly subscription** to essential services needed for a safe and comfortable life.  
(POC Launched Feb 2020)

- 24x7 Paramedic Emergency Response
- Daily check-in calls
- Access to lively activities
- Offers and Discounts



Events



Activities



Safety



Emergency



Elder App



Convenience



Health



Nurses



Doctors



Physio

**assure**<sup>TM</sup>  
care plan

**Monthly subscription** to high quality support and services  
(Product Launched Oct'2019)

- Empower Care plan offerings plus..
- 4-Hours of Support for Errands
- Regular calls by a dietician
- Annual full body check-up
- Monthly visits by a doctor, nurse & physiotherapist
- Add on Care Partner / Care Angel (nurse) support
- Add on specialised health consultation support

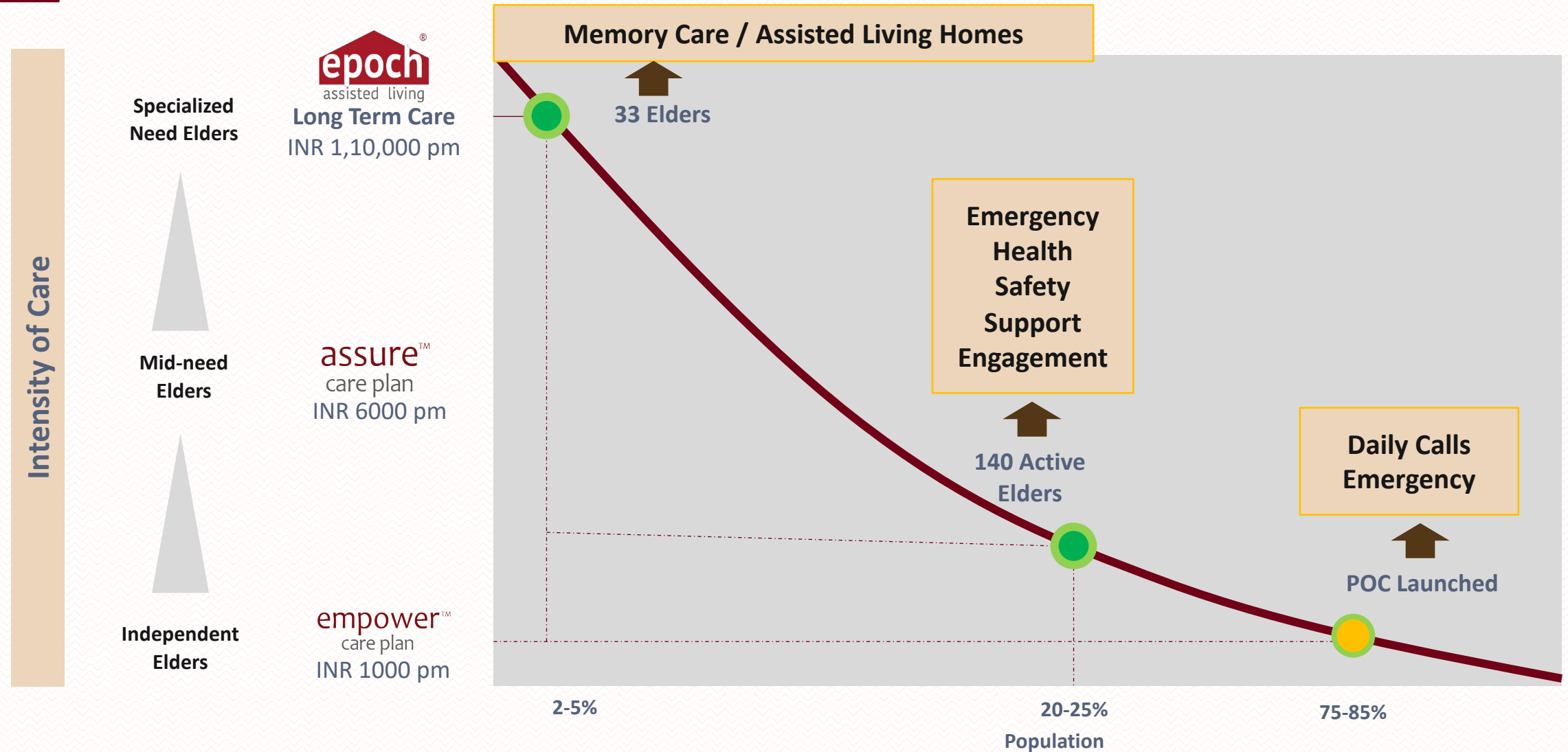
**epoch**<sup>®</sup>  
assisted living

Premier Assisted Living Homes providing person-centered care to elderly. Founded in 2012

- 4 homes across Gurgaon and Pune
- 24x7 assistance with Activities of Daily Living, Medication Administration
- Specialized care for individuals with Dementia and other chronic conditions
- Palliative and end-of-life care
- Care supervised by senior nurses
- Evidence based events & activities



# EMOHA PRODUCT SPECTRUM: ACROSS CONTINUUM OF CARE



# MARKET SIZE: UNTAPPED | UNDERSERVED | SCALABLE MARKET

*Maximising  
care choices  
for elders and  
family  
members*

*Solutions that  
enable an  
elder to live  
comfortably at  
home*



assure<sup>TM</sup>  
care plan

empower<sup>TM</sup>  
care plan

100k pm

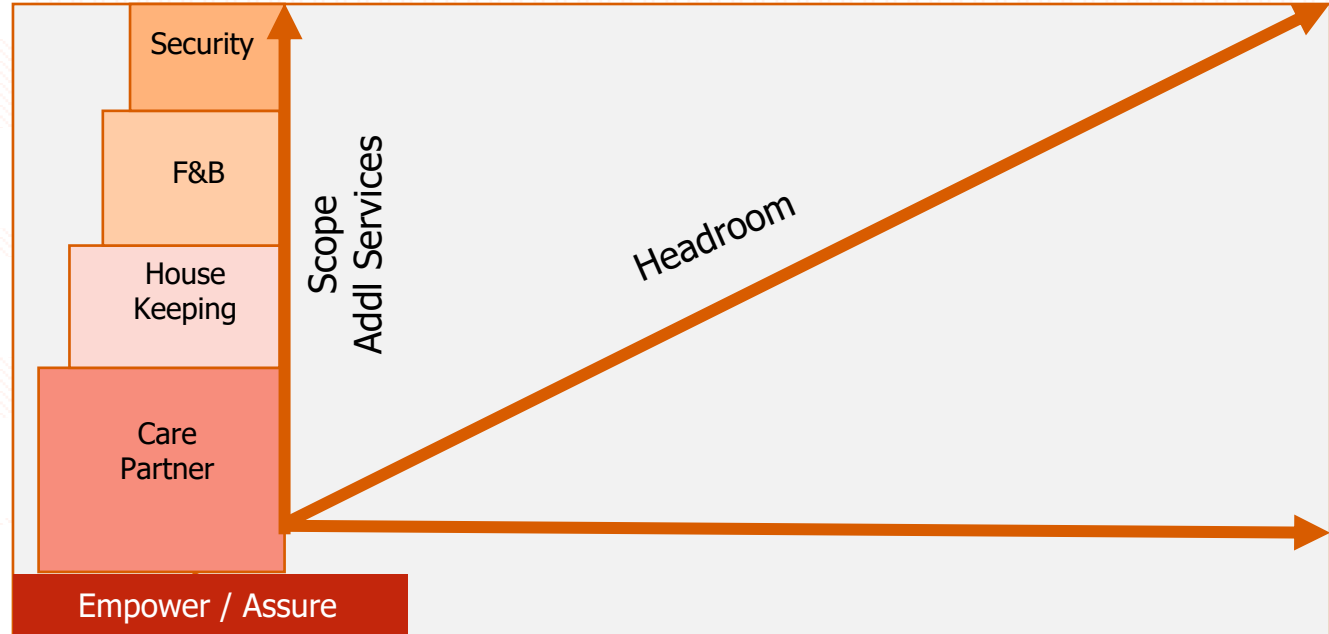
45k pm

30k pm

20k pm

6k pm

1k pm



Current Market  
Size 25,000 Cr

One Elder  
Home



300,000  
Elder  
Homes

Source: VII Pay Commission report, Capitaline, Goldman Sachs Global Investment Research, Emoha Research & Business Projections

Opportunity to dominate the **eldercare category** with carefully thought through **tech enabled** care offerings



Emoha  
founded  
Feb 2019

Team &  
Tech Buildout  
Mar – Oct 19

Product  
Launch  
Nov 2019

**200+** Elders  
on network

**33**  
Elder  
Emergencies

**2420 Days**  
Care delivered

**85**  
Doctor Visits

**7892**  
Care Calls

**105**

Dietician  
Consults

**5000**  
Engagement  
Calls

**35**  
Engagement  
Events

Fully operational in Gurgaon | South Delhi | Dwarka |  
Noida.. Soon in rest of NCR Delhi

**Deshraj**

Emergency Responder  
Retd Ex Defence force  
Personnel

**Aaram**

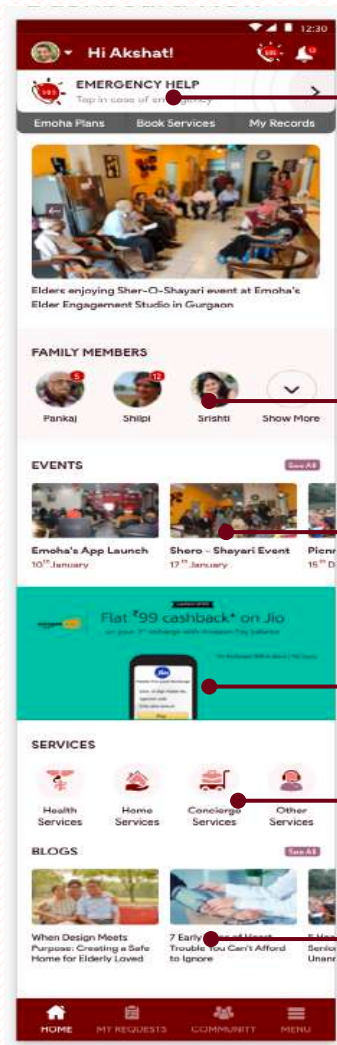
Paramedic Nurse  
Emergency Expertise



*Secure.. and then Energize Life.. Every second counts..*



# EMOHA APP: A COMPREHENSIVE ELDER CARE GATEWAY



## Emergency Services

Request Emergency Support  
Activate emergency from sensors at home

Updates on Family  
Notifications & Alerts

## Engagement Services

Community | Events | Learning |  
Travel |

Special Offers & special discounts for elders

## Health Services

Book Home Services  
Book Concierge Services

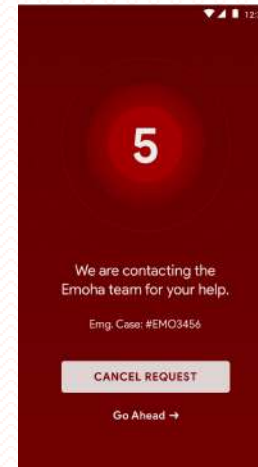
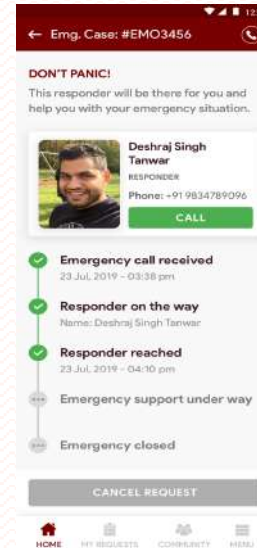
Explore and discover  
resources and elder  
focused information

Access a world of  
services at the  
touch of a button



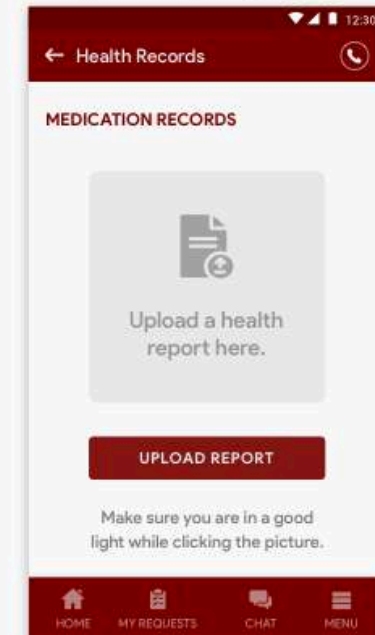
# EMERGENCY SERVICES: INDIA'S FIRST RESPONDER FOR ELDERERS

- ❑ 24x7 Care & Coordination Center activated through Emoha App or Sensors or call to toll-free number
- ❑ Paramedic-Defense Emergency Responders trained in BLS & First Aid equipped to respond to medical and non-medical emergencies
- ❑ Sensor Kit with panic buttons, fall detectors, motion sensors, smoke detectors
- ❑ Hardware agnostic integration with Apple iWatch, FitBit



# HEALTH SERVICES: ELDER CARE EXPERTISE

- ❑ Gateway to connect elders with verified & certified Nurses, Attendants & Physical Therapists
- ❑ Family Doctor – Dietitian – Physiotherapist combination provides a holistic approach to care
- ❑ Guided by globally benchmarked evidence-based systems and protocols
- ❑ Electronic Health Records give elders seamless access to their records and to monitor vital signs





# ENGAGEMENT SERVICES: CREATING A COMMUNITY OF ELDERS

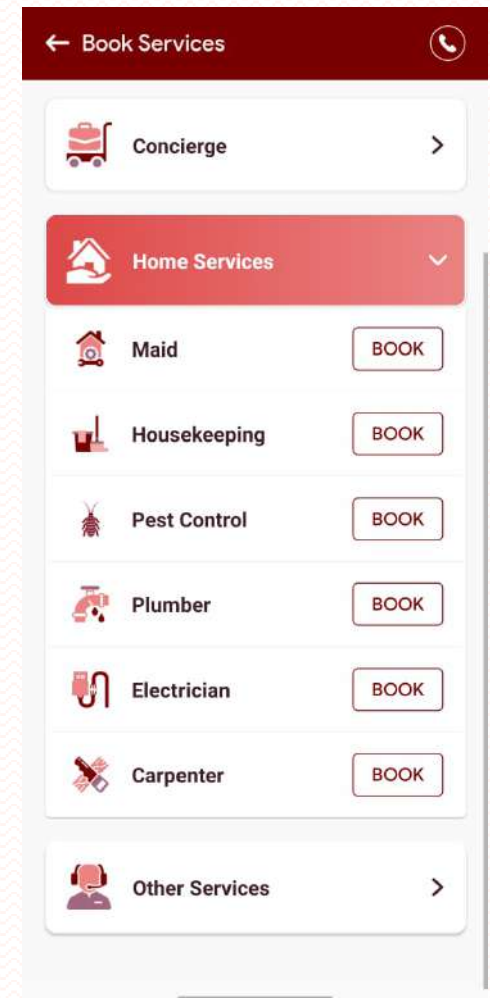
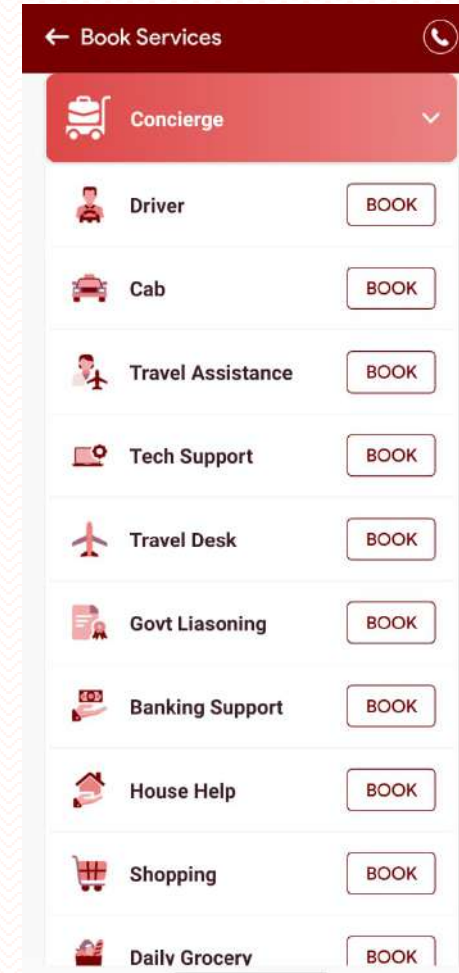
- ❑ Creating a community of elders linked by common interests
- ❑ Connecting elders with opportunities to earn or volunteer
- ❑ Elder-centric events help stimulate mind, body & soul
- ❑ Daily check-in calls aimed at engaging with elders on a regular basis to help combat loneliness

**LONELINESS IS A GLOBAL PANDEMIC**



## SUPPORT SERVICES: ONE-STOP CONCIERGE

- ❑ Trained Ex-Defense Force personnel deployed to provide companionship and support for errands, hospital visits, booking appointments
- ❑ 24x7 Concierge help desk to assist elders with all of their needs
- ❑ Connecting elders with verified service providers to facilitate travel bookings, household repairs, pest control, doctor/nurse home visit booking, etc.



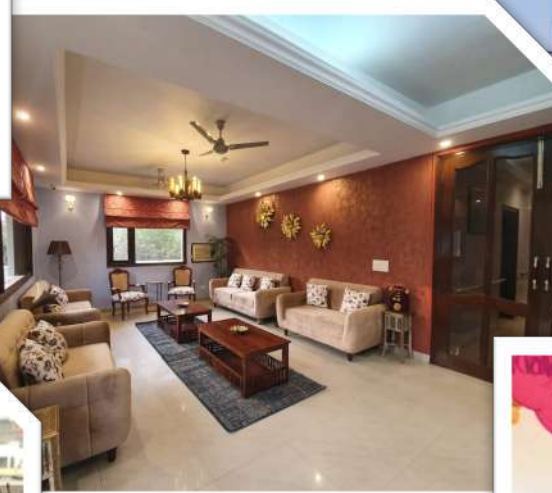


# CONTINUUM OF CARE: COMPREHENSIVE | HOLISTIC | CONNECTED

Emergency  
Responders &  
Paramedics



Home Doctor Visit



Epoch  
Home

Daily  
Calls



Airport  
Companion  
Support

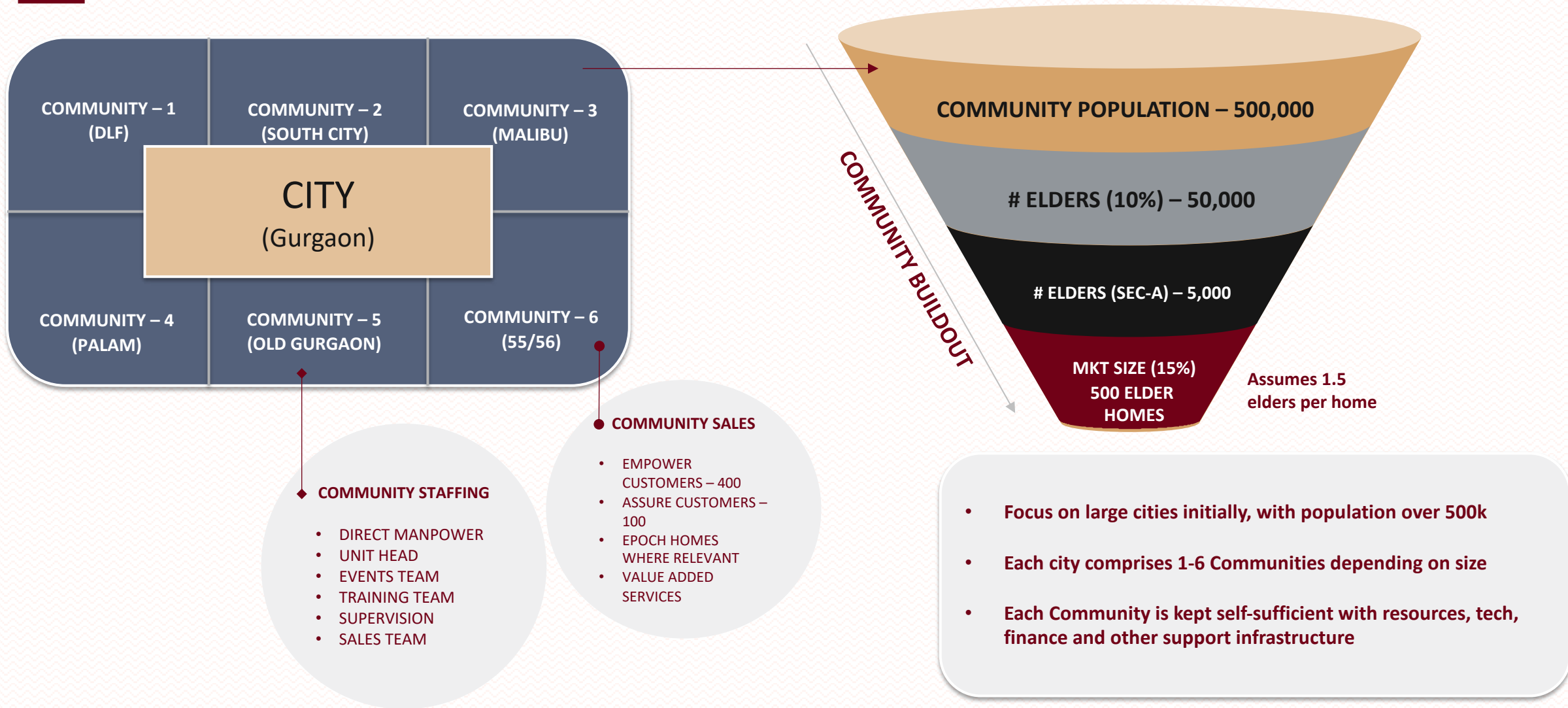


Engagement /  
Picnic

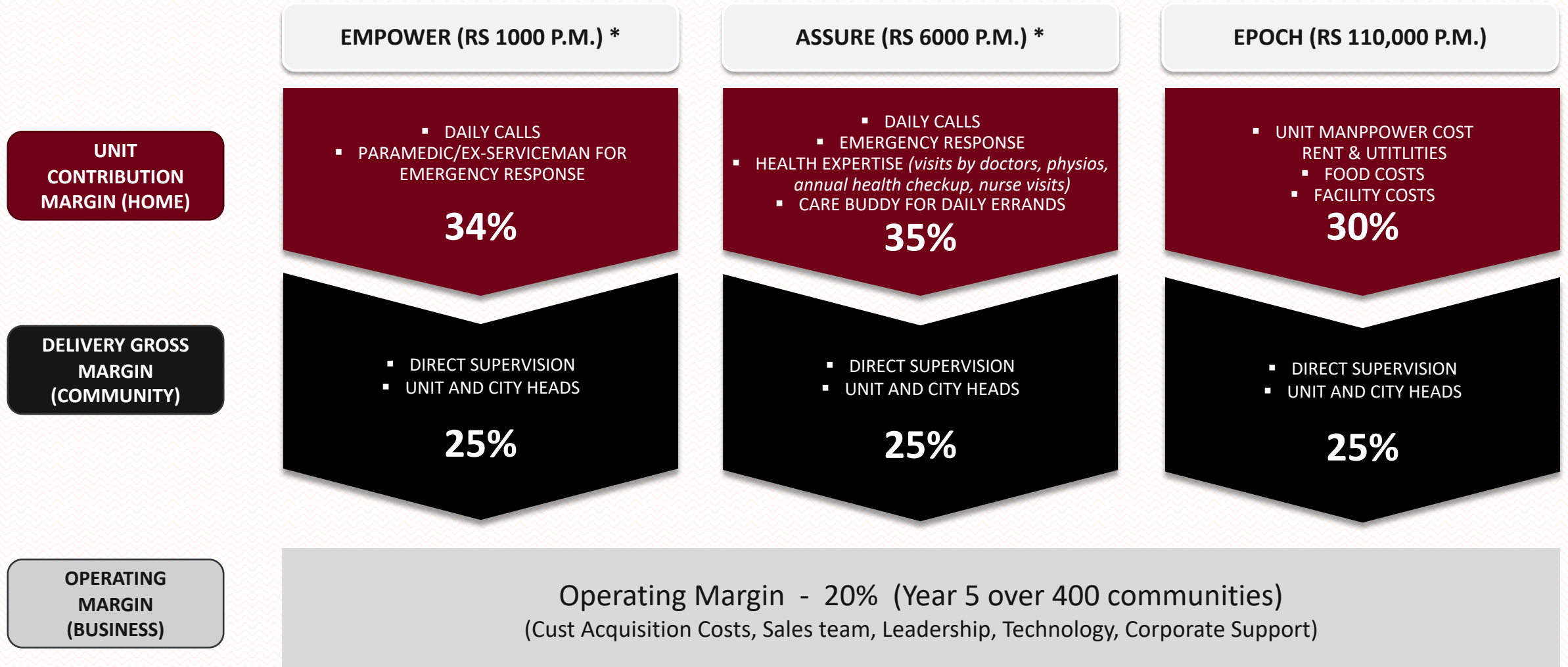




# FINANCIAL MODEL: LINKED TO “COMMUNITY” OF 500 POPULATION



## BUSINESS ECONOMICS: ACROSS PRODUCT LINES



\* Unit computations done at Price of INR 500 pm and INR 4500 pm respectively for retail / distribution channel spreads

# GLOBAL MARKET: TRENDS

**Care.com**  
EV US\$415m  
Series E: US\$50m

**honor**  
US\$100m Revenue  
US\$115m fund raise  
US\$50m Series C (2018)

**aPlaceforMom.**  
US\$55m Revenue

**Lifesprk**  
Whole Person Senior Care  
Rev: US\$15m

**Caring.com**  
Rev: US\$15m

**Home Instead**  
SENIOR CARE  
To us, it's personal.  
Over US\$1b Revenue

**Right at Home**  
Rev: US\$20m

**SENIOR  
Helpers**  
US\$15m Revenue

## USA

- Brookdale (1978) - \$4 Bn
- Amedisys (1982) - \$1.6 Bn
- Kindred (1985) - \$6 Bn
- Ensign Group (1999) - \$2 Bn

46  
mn

## Europe

- Sunrise (1989) - \$0.6 Bn
- Korian (2001) - \$2.6 Bn
- Attendo AB(1985) - \$1.1 Bn
- Orpea (1989) - \$3.7 Bn

176  
mn

## India

120  
mn

## Japan

- Benesse(1967) - \$5 Bn
- Tsukui (1969) - \$0.7 Bn
- Nichi Gakkan(1972) - \$4 Bn

126  
mn

Decadal  
growth rate of  
**35% for 60+**  
Vs 17% for the  
rest

■ Mature  
■ Developing

India presents one of the largest opportunities in elder care - Indian economics with global best practices



# EMOHA™

eldercare

