



# Pet Care Market Landscape In India



The Indian pet care market size is valued at **₹74,000 crore** in **2022** and is expected to reach **₹2.1 trillion** by **2032** with **19% CAGR**. [🔗](#)



**Gen-Z** drove the **first-time** pet-parent pool with over **48%** of pet adoption being led by Gen-Zs followed by **millennials** at **44%** in the last two years. [🔗](#)



**Demand** for veterinary professionals has increased by at least **10-15 percent** in the first half of 2023 as compared to the same period 2022. [🔗](#)



Only **16 %** of pet parents in India **avail** of **online veterinary consultations** at the moment. This number is set to rise in the future as **51%** of pet parents from **Tier I** cities, along with **33 %** of pet parents from **Tier 2 and 3 cities**. [🔗](#)

## Hypothesis

A pet care platform that helps first time pet parents know when their pets are sick by using **AI** and **Image recognition technology**. Detection of possible symptoms, initial **diagnosis information** generated by AI and **approved by veterinarian** would provide a **timely care**. Also the platform helps pawrents to choose whether a **home consultation** or **online consultation** of veterinarian checkup needed from **nearby best rated** vet doctors. Additionally services like **behavioral training** for pets, find a pet near me for pet lovers who are looking to **adopt** helps supporting growing community. **Goal** is to address **hassle of travel**, **seamless** online vet consultations, **Less anxiety** on providing right timely care and **not worrying** about availability of **near by clinics** and finding **right veterinarian** for the pet.



## Market Players

- **Kuddle**: Reach 100K+
- Strength: Behavioral Training
- Weakness: Grooming services, Vet experience

- **Supertails**: Reach 500K+
- Strength: One stop solution for pet superstore and care
- Weakness: Customer support, delivery issues.

- **Zigly**: Reach 500K+
- Strength: Experience centers
- Weakness: Bugs, not able to place vet tele consultation

- **Vetic**: Reach 10K+
- Strength: clinic experience
- Weakness: vet service app unresponsive, bugs



# Hypothesis Validation: Discoveries from Surveys and Interviews

## Insights from Survey [What Pet parents say \(14 Responses\)](#)

### [Hassle of Travel](#)

**58%** respondents face challenges while **travelling** to vet clinic.

**63%** respondents says they need **one more person** to **accompany** while travelling to vet clinic.

### [Choosing a vet and clinic](#)

**79%** respondents says they would prefer **qualified** veterinarian **visit home** to address pet's health.

**79%** respondents says when choosing a clinic they would factor in **reputation**, staff treatment, **is it near my location**.

### [Electronic health record](#)

**79%** respondents prefer maintaining pet's health record online when if it is not that **much of hassle**. Currently maintained over **pen & paper** and **clinic chart sheet**.

[Secondary research](#) also suggests that,

- To make pet-parenting journey easier, **72%** Gen-Z pawrents believe that **online vet consultations** should be made available.
- **38 per cent of Indian pet parents** are **not satisfied** with the current **veterinary consultations** and are continuously looking for **alternative choices** to provide **better care** for their fur babies.
- Data insights reveal that a notable **51 per cent** of pets encounter **skin and fur issues**.

## Insights from User Interviews [What Dog parents say \(4 Interviewed\)](#)

### [Challenges faced and concerns](#)

**3/4** pawrents not able to **find pet friendly cabs, autos**. They had **long wait time** with **minimal options** to choose from for a ride.

**3/4** pawrents can see that their **dogs get anxiety** or **panic** whenever they go to **clinics**, sees **other dogs** their.

**3/4** pawrents are majorly concerned about **skin allergies, rashes, dietary**.

### [Observations on behaviour of dog](#)

**4/4** pawrents feel when their **pet is sick**, they **do not know** exactly what might be **problem/cause**.

**4/4** pawrents feels they can tell **something is wrong** by the way **dog behaves**.

### [Preference of consultation](#)

**4/4** pawrents for majority of time prefers a **vet coming home** and want to go to **clinic** for **emergency situations alone**, since **size of the dog** has to be considered and with busy **work schedule**.

**3/4** pawrents prefers to use **online vet consultations** for **minor health** concerns and have some **initial diagnosis done**.

### [Behavioural training need](#)

**4/4** pawrents extremely **emphasize** on **behavioral training** of **young pet** especially who have **family with them**.

Please use this [link](#) for insights of what non-pet parents say ?





## Problem Breakdown

### What is the true problem ?

Pet parents heavily rely on **veterinarian advice** for **pets health** but not able to find **seamless online consultation, near by vets, with hassle in travel**. Also, India boasts just **1 vet per 5350 animals** to be cared for, veterinarian ecosystem still needs revamping and Improvement in India.

### How do we know it is a real problem ?

User research suggests that 75 % pet parents seeks better online consultation and hassle free solution for health concerns.

-  • The Indian Veterinarian battles enormous odds everyday to provide medical care to our dogs and cats
-  • 30 per cent of pet parents complained about facing challenges with the accessibility of veterinary services in their respective areas.

### Who are we solving this problem for ?

**For pet** - Better right **timely care**, **For pawrents** - **seamless, hassle free** online consultation with **convenience**, **For vets** - **Improved ecosystem** and **better accessibility** with **tech enabled** care support.

### Why are we solving this problem now ?

Prioritising **proactive care**, **Gen Z** is contributing to the well-being and longevity of their pets while **driving growth** in the pet **industry**.

India's pet care industry is set to touch **₹10,000 crore by 2025**. The **growth** is led by **factors** such as **rising incomes, nuclear families**, and changing **attitudes** toward pets and pet parents.



## User Segment and User Persona

### User Segment

**Dog parents from Tier 1 and Tier 2 cities** 90% Respondents

This segment is mostly are working professional who have pets for more than 1 year and are in age group of 20-44. They seek hassle free online or home visit consultation from veterinarian. Seeks validation for minor healthcare details with the vets who are well reputed and trusted by the community.



### User Persona **Arun 32 | Auditor | Pune**

- A caring, attentive dog parent whose top priority is health and happiness of his dog.
- He is tech savvy to find out different pet apps, services that helps him to provide best care.

**Need:** Constantly seeks easier, convenient better **online** consultation for **minor** health concerns and **faster diagnosis** to provide care. Prefers **home visits** from **trusted, certified** vets.

**Pain Points:** Face challenges while **travelling** to vet, feels **anxious** while waiting to get **diagnosis** from vet.

### Jobs To Be Done:

**When** I want to **address** my dog **health concerns**, I seek veterinarian **But** I find **no easier, better** options for **online consultation** and diagnosis

**Help me** with **seamless online care** from trusted vets **So that** I can provide **best care** to my **beloved dog**.



# Potential solutions and feature prioritization



## Moscow Framework

### Must-Have

**Health Detector:** What is it ?

- An **AI enabled image recognition** technology that helps pawrents **seamlessly diagnose** pets health and provide **possible causes approved by vets**.
- Prompts to **conveniently** book a call with vets for **online/home consultation** based on **severity of diagnosis**. Thus addressing the **timely** right care for pet.

*Part of MVP*

### Should-Have

**Health Record:** What is it ?

- **Store pet health record** of all the **scans consulted** via app.
- Show **verified and licensed** practitioner.
- Veterinarian will **receive image and diagnosis details** and **approves** with comments as needed.
- For **MVP**, **scan checks** will only be **available for skin and fur issues**.

*Capability to scan other body parts will be post MVP. Part of MVP*

### Could-Have

**Health Record:** What is it ?

- Functionality to capture **vaccination details, dietary plans** and **generate alerts** for the same.
- **AI Chat bot** functionality for **general health, nutrition** queries.
- After prescription, get **delivery of medicines** at doorstep.

*Post MVP*

### Won't-Have

**Behavioral Training Programs & Find a pet near me:** What is it ?

- **Certified trainers** helps pawrents train pet through **personalized** training sessions at their **home**.
- **Adopt pet** via **online** by having search listing features like near by pet, pet and agency details.

*Post MVP*

## MVP value proposition and riskiest hypothesis

### Value Proposition



#### **PawVitality Healthcare**

Presenting **PawVitality Healthcare** that enables both **pet parents** and **vets** to come together to provide **right timely care** for the **pet**.

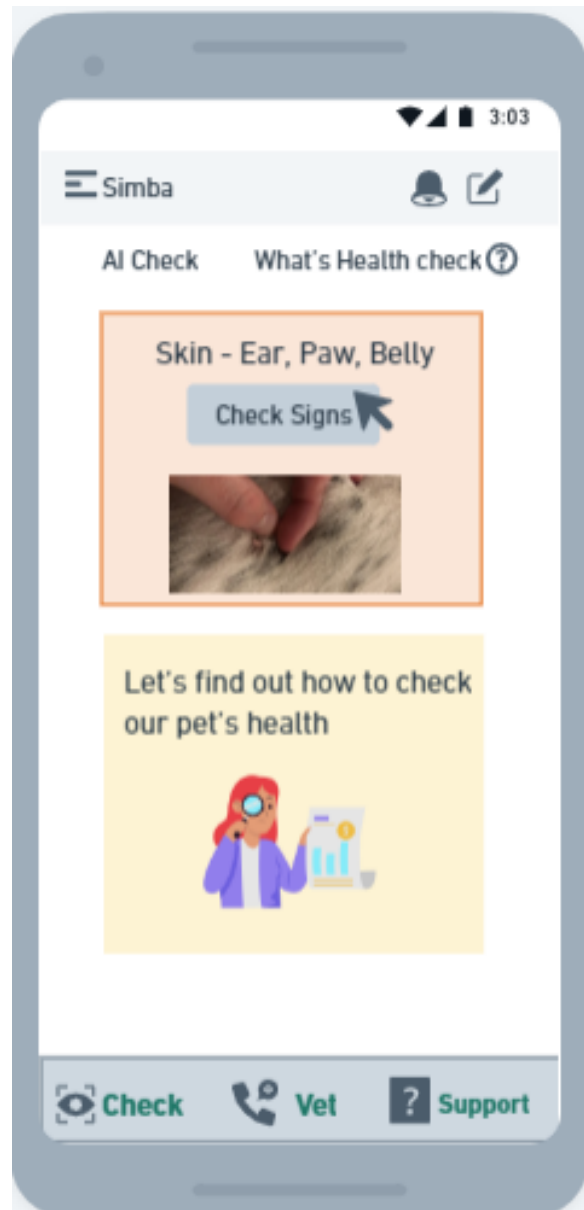
- **AI enabled** predicted diagnosis **verified** and **approved** by vets.
- **Convenience** of consultation at **home or online**.
- Reduce **unnecessary travel**, hassle of **finding a vet**.



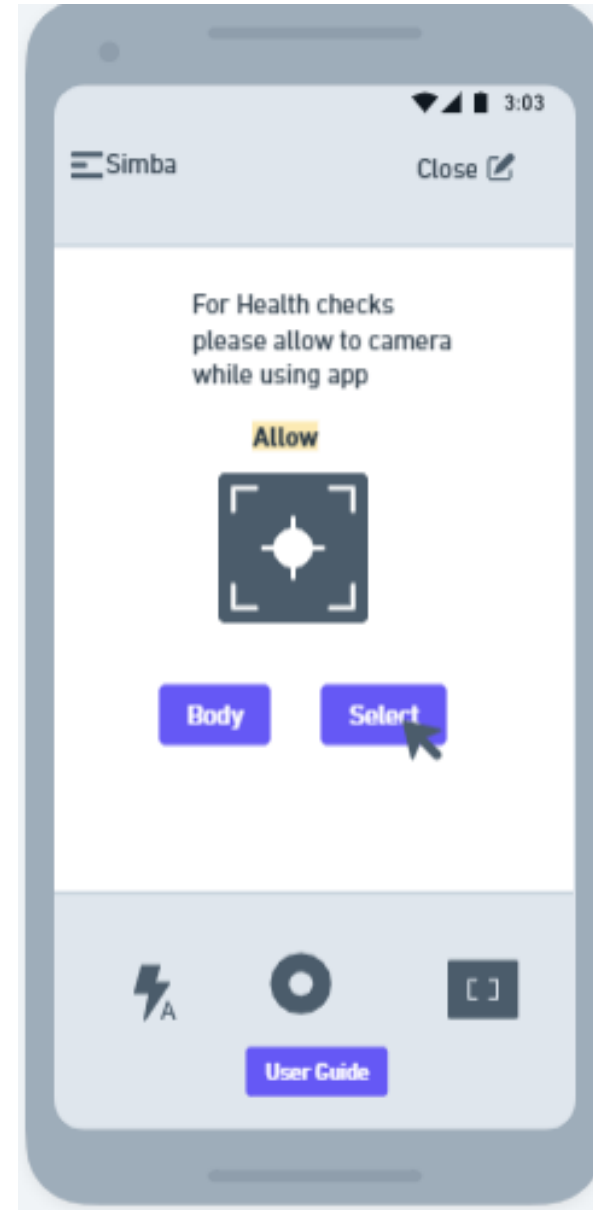
### Riskiest Hypothesis

- Will **enough users** use it?
- Will users still find it **overwhelming**?
- Will users **trust our technology** and share their **pets concerns**
- Will **veterinarian** find it **easy** to provide **better care**

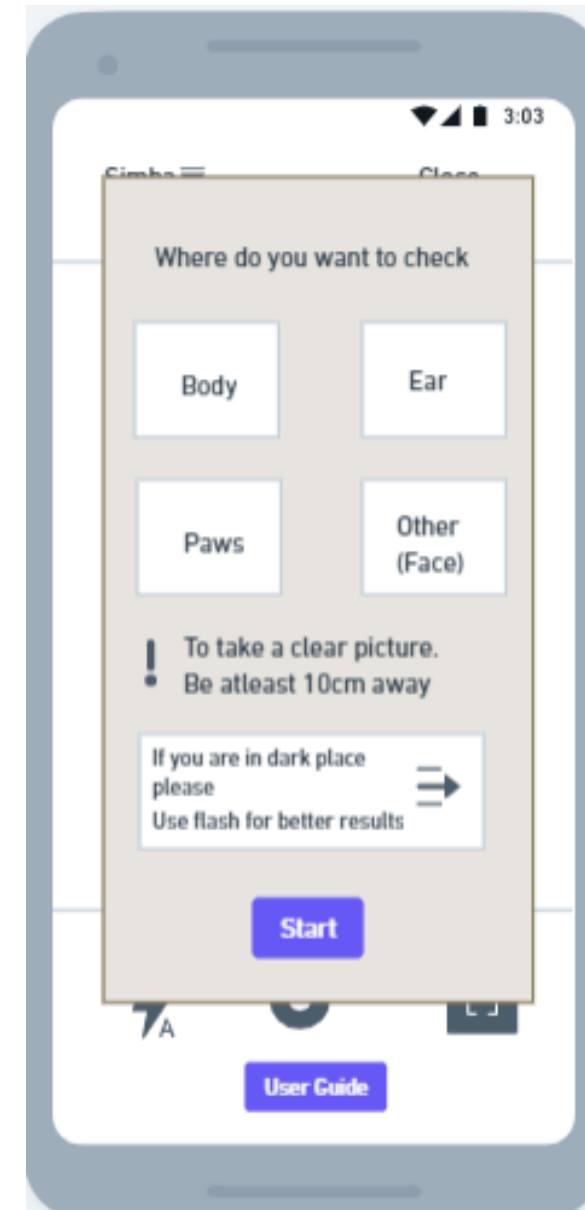
## AI Check home screen



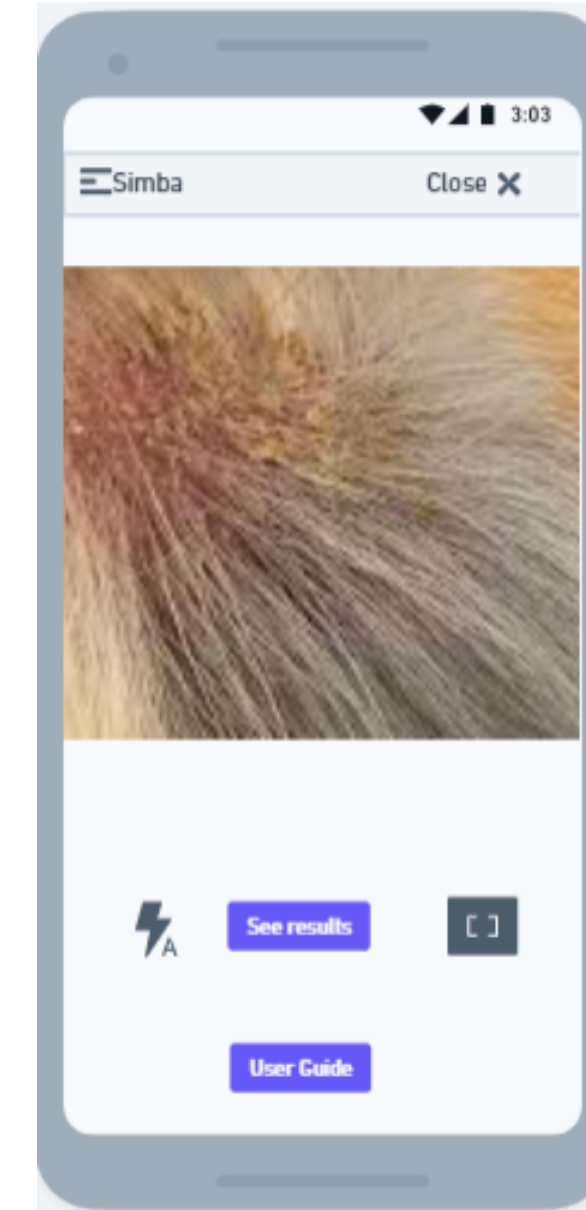
## Image permission screen



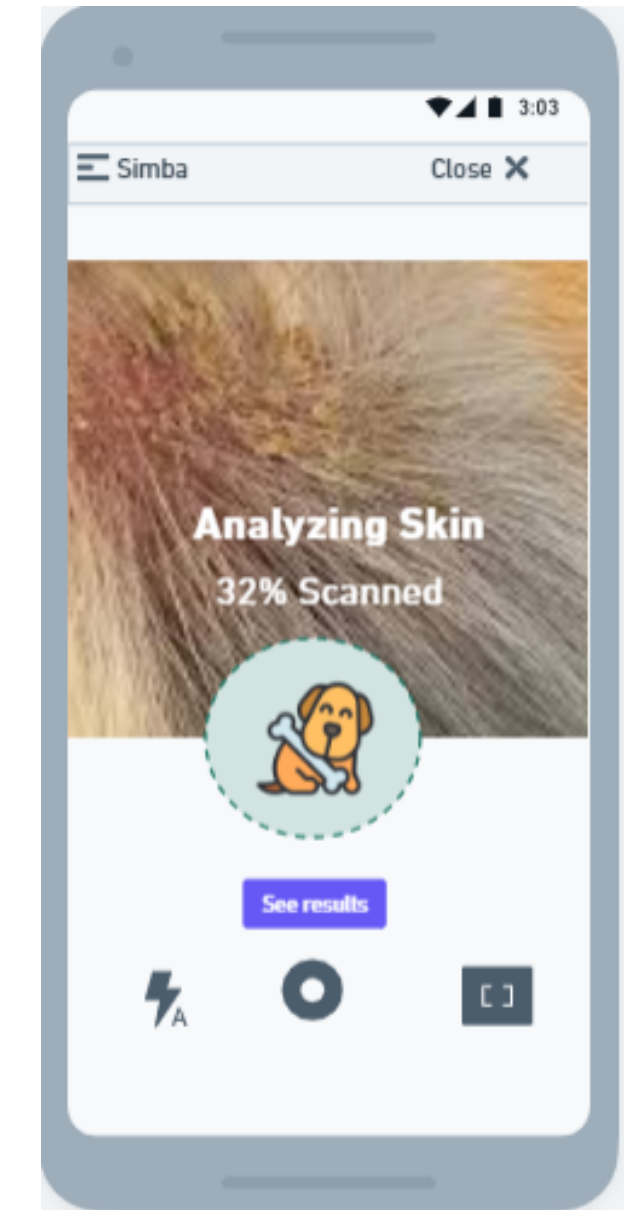
## Image setup screen



## Image display screen



## AI Analysis screen



- User guide is prompted to help pawrents navigate scanning skin check for first time
- Call option to vet, scan check history, support features are available.



- Prompt to ask for camera permission
- Initial Body scan is set default
- Select option enables to choose type of body part to scan.



- List of option to choose what to scan
- Clear Instructions are provided to ensure camera position, coverage, light are good.



- Once image is taken, a preview will be displayed.
- Select see results to run AI Analysis and get the diagnosis of possible symptom.

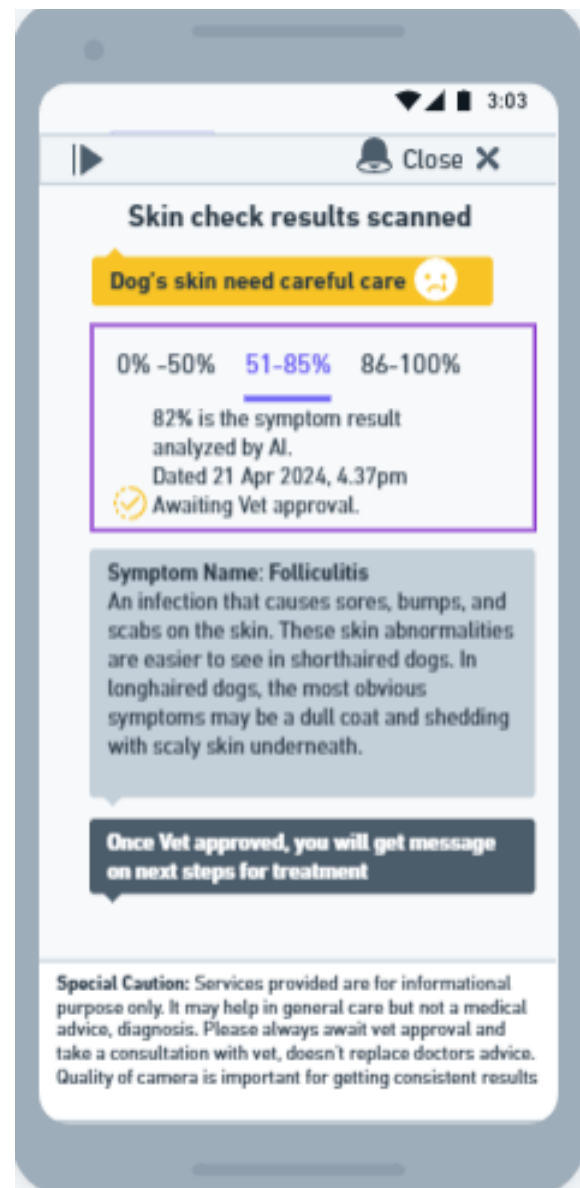


- Clicking see results will initiate the AI analysis of scanning 1000s of labelled data images
- To recognize and retrieve best match and provide possible diagnosis results.

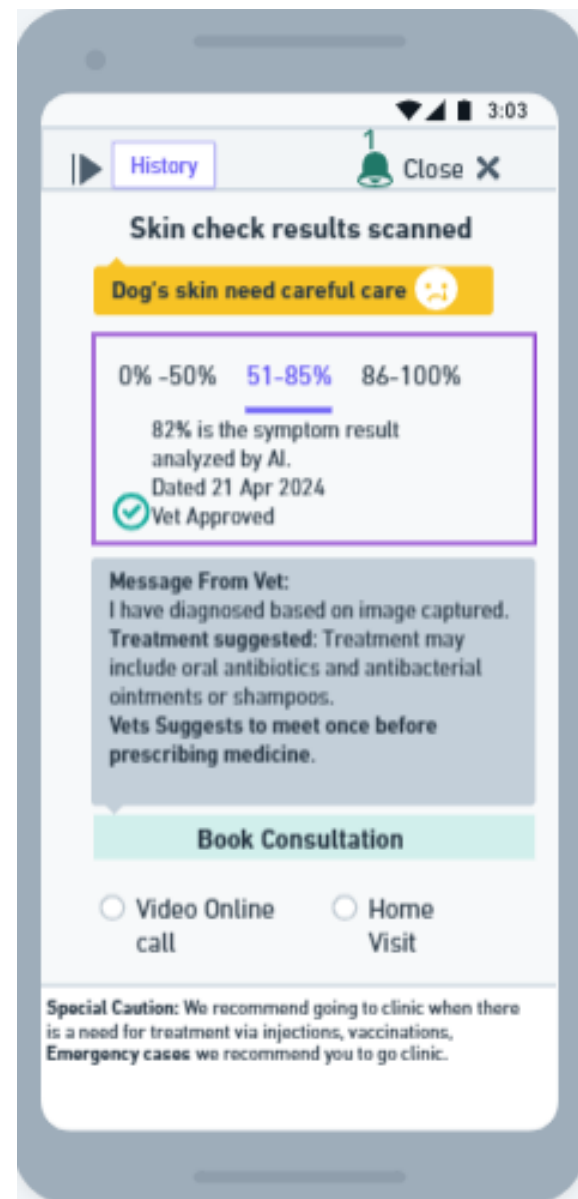




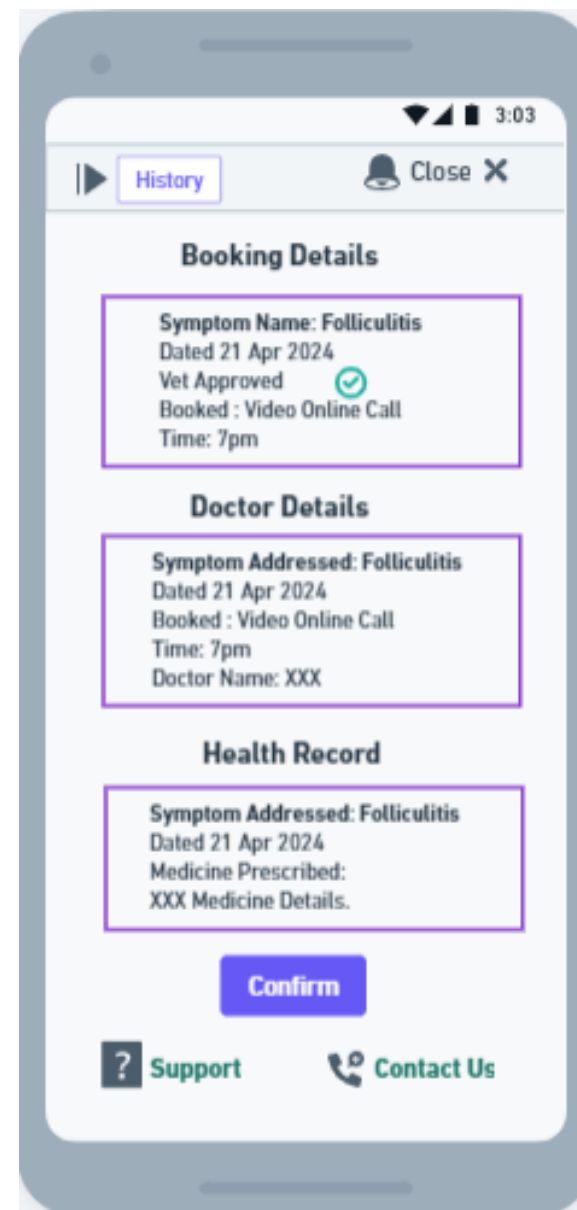
## AI Check results screen



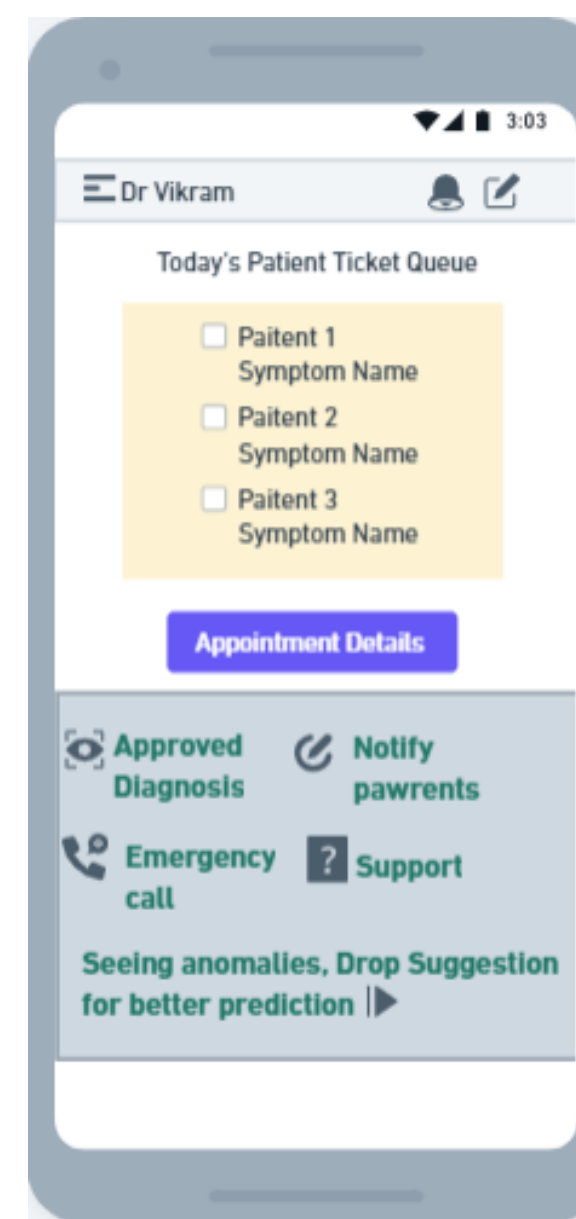
## Consultation screen



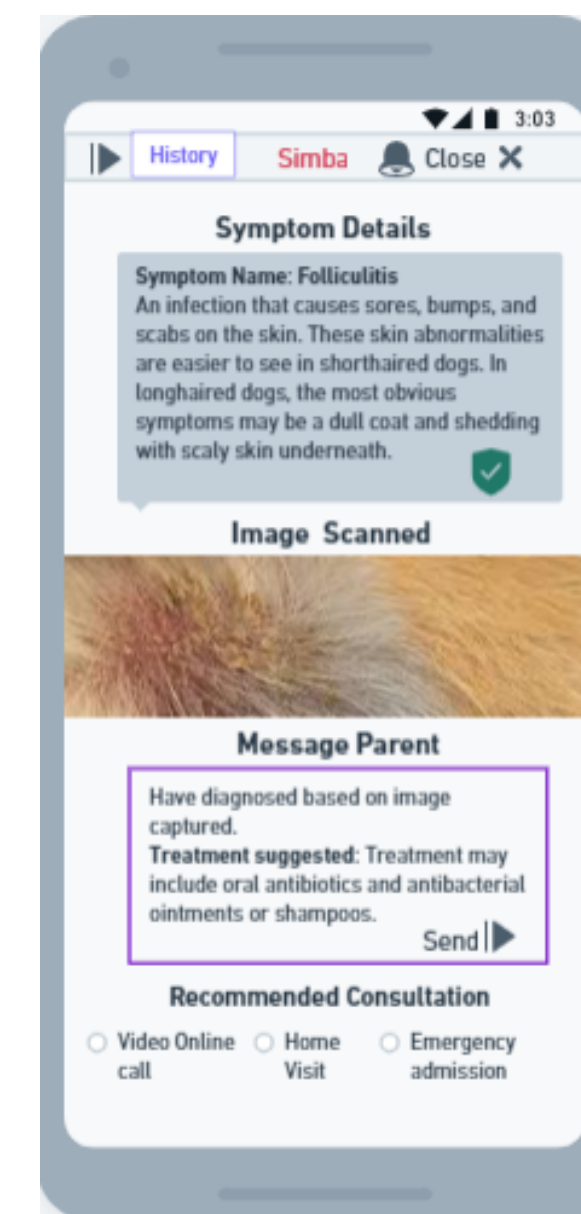
## Booked details screen



## Vet Home screen



## Vet diagnosis screen



### User Journey

- AI Provides insights into symptoms details, vet approval status, next steps.
- AI also indicates the % of matching symptom, displays emoticon based on % value.



- After vet approved diagnosis, personal message is sent by vet
- Mode of consultation option to choose for pawrents is displayed.
- Caution message is notified.



- Booking details.
- Doctor details.
- Health record details.
- Support or contact us options are enabled.
- Confirm booking.



- Vet profile, list of patients details to approve diagnosis are displayed.
- Single click for notifying pawrents, simple access to support or anomaly concern can be raised.

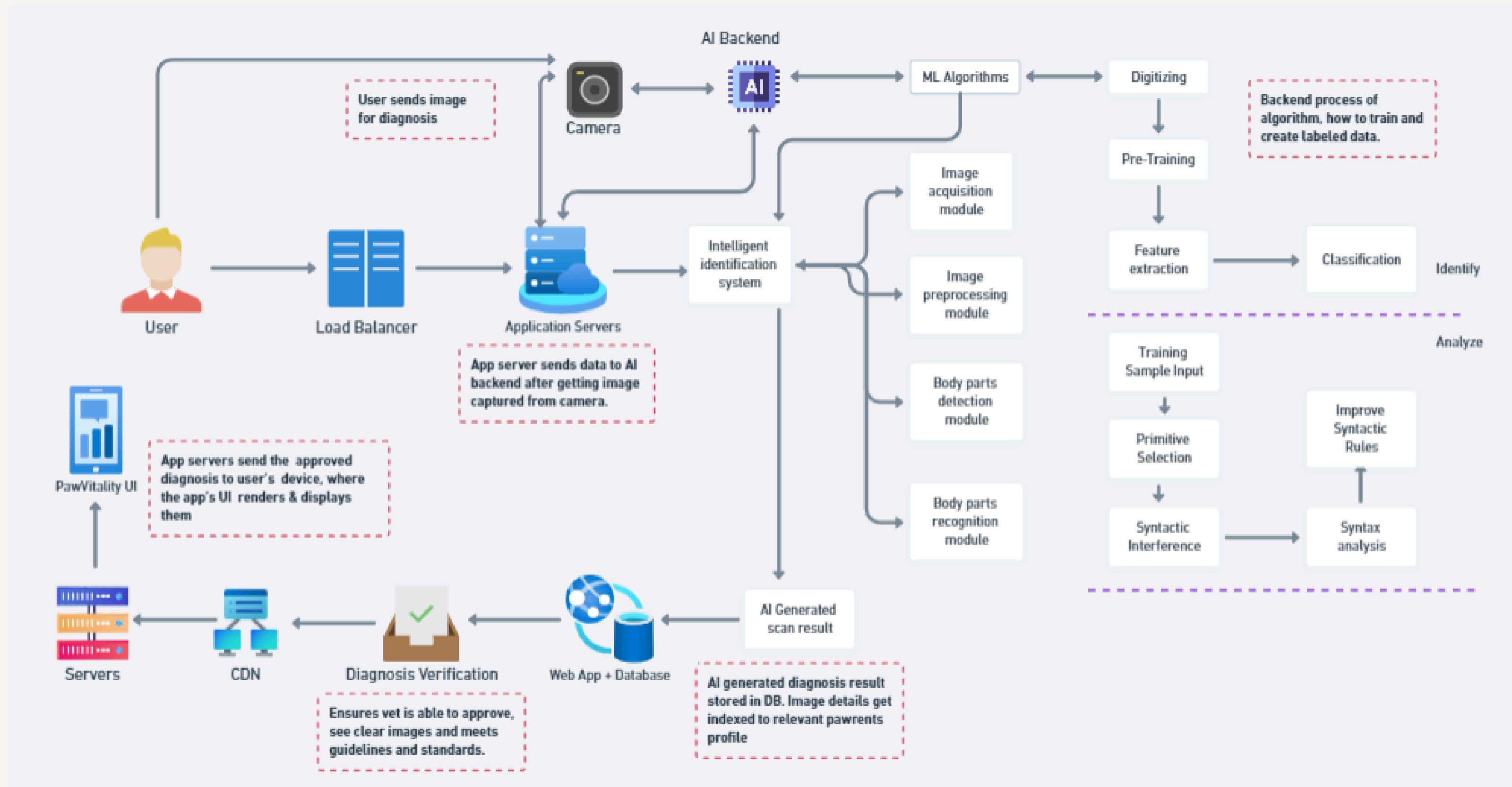


- Vet can easily diagnose and approve symptoms, can see the diagnosis summary for approval and scanned image. Message can be sent to pawrents.
- Emergency option is enabled for vet to decide the consultation mode.





# System Design for MVP



Illustrates the end-to-end flow of the AI-powered Image recognition health detector process, encompassing user interactions, backend AI processing, diagnosis verification, and storage.

[Link to Design](#)

## Success Metrics

**Our Goal** is to provide **seamless online** consultation for pawrents, **hassle free** diagnosis and provide **timely care**, thus:

**North Star Metric: User Adoption Rate**

User Adoption Rate = Number of users who **scan checks for diagnosis** / Total number of Users

**Retention Metric: % user renewing subscription**

User Retention Rate = **Current** number of users/ Total number of users

**Product Usage Metric: User Session on all module**

**L1** - % of users who have opted in but **dropped of at D7, D14, D21**.

**L1** - % of users who used **guidance page** for image scan/ total number of user **who scanned image**

**L2:** Avg page per session, Session Duration per user, **Engaged Session** per user (**Heat Maps**)

**Supporting Metric:** Number of users subscribed for **monthly, annual plans**

**Satisfaction Metric: Review of CSAT**

**Product Health Metric: Diagnostic Accuracy, General Support**

**L1:** Number of **vet approved diagnosis** / Total Number of diagnosis scanned

**L2:** No of Support Queries with **error scenarios raised and resolved**

**Business Outcome Metric:**

- **% in market share**
- **Total revenue generated**

## Go to Market Strategy

**Phase 1:** Initial pilot launch in **Tier 1 cities** like Bengaluru, Mumbai, Delhi, Pune

**Phase 2:** Post pilot launch in **Tier 1 cities** like Chennai, Hyderabad, Ahmedabad and **Tier 2 cities**.

### Awareness

- Showcasing our product on **India's biggest pet event "Pet fed festival"**
- **Partnerships** with **vets** and **clinic** hospitals.
- **Promoting** successful **user stories** of the **product** in **social media**.



## Monetisation plan

### Free Plan

- Users can try out all features of the product for **first 3 scan** checks.
- **Unlimited Pets profile** scans offered in this so that a broader set of user base can be attracted.

### Usage Based Plan

- Users can try out all features of the product. Users can **limit the checks** they want to **use and pay** for usage.
- Priced **299 for 6 Scan** checks for the starting usage plan.

### Subscription Plan

- Users can try out all features of the product via monthly or annual subscription. Unlimited Scan Checks, Storage.
- Priced at **499 per month** and **3999 yearly**.
- This plan will act as **recurring source of revenue**.

## Possible Risk and Mitigation: What makes this idea fail ?

### • **Risk: Accuracy Concerns**

- Image recognition algorithms may not always **accurately Interpret** the **content of the images**, especially if the quality of the image is poor or if the condition being assessed is **complex**.
- This could lead to **misdiagnosis** or incomplete assessments.

### • **Mitigation:**

- **Regularly assess and validate** the **accuracy** and **performance** of image recognition algorithms. **continuous improvement** based on **feedback** and **real-world data**.

### • **Risk: Regulatory Compliance**

- India's regulations governing healthcare services, **data privacy, data security**, and telemedicine guidelines need to be considered.
- Storing and transmitting images of **sensitive health information** carries inherent risks.

### • **Mitigation:**

- Ensure **compliance** with **relevant laws, regulations, and professional guidelines** to **avoid legal** and regulatory risks.
- Adhering to **data protection laws** and implementing **robust security measures**.

### • **Risk: Tech limitations**

- such as internet connectivity issues, **software glitches, hardware malfunctions** could disrupt the platform.

### • **Mitigation:**

- Provide **technical support and troubleshooting assistance** to Pawrents.