

FEMTECH

Digital Revolution in Women's Health

GLOBAL TRANSFORMATIONAL HEALTH TEAM AT FROST & SULLIVAN



Digitizing Women's Health

FEMTECH

Software, diagnostics, products, and services that use technology to improve Women's Health comprises Femtech, also referred to as Female Technology.

Femtech involves

the use of digital health to motivate patients to access and use applications for managing health issues.



Reproductive **Health**



- Fertility solutions Period & fertility tracking
- At-home fertility monitoring

Nursing Care

Pregnancy &



- Prenatal screening
- Post natal care and maternal health including breast feeding
- Pregnancy related conditions

Healthcare

Pelvic & Uterine



- Uterine health
- Urogenital health Menstrual health

& Wellness

General Healthcare



screening Nutrition and fitness

Diagnostic tests and

- Mental health
- Chronic disease management
- Homecare and elderly care
- Sexual wellness

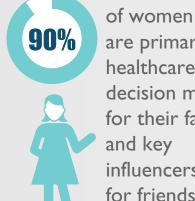
of global

With the rise of **she-conomy**, women are increasingly playing an

Women in Healthcare —The Movers and Shakers

influential role across the healthcare continuum as consumers, decision makers, healthcare professionals & caregivers

of the household



are primary healthcare decision makers for their family and key influencers for friends

of healthcare



80%

healthcare spending is done by women. Working-age females spend 29% more per capita on healthcare compared to males in the same age group



healthcare customers are women and they are the primary caregivers for the elderly and children



professionals are women. Most are nurses, and <40% are in executive or managerial positions



66%

users look online for healthcare information. Women are 75% more likely to use digital tools for healthcare than men

of women internet



of CEOs & 21% of Board Members at Fortune 500 healthcare companies are women and this is expected to increase

Trends & Projections - Femtech is Set to Disrupt Women's Health Market

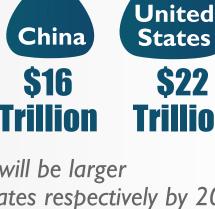
Market Potential of \$50 Billion by 2025

Total Global Earnings of Women* GDP (nominal) in 2020





China



Global Investments in Femtech New Age Applications

The first mobile application for contraception 227 Digital received **CE** approval as a Class 2 Medical **Health Deals**

of \$11.5B

Source: Frost & Sullivan's research study "The Next Frontier of Growth + Women as Corporate Customers" 2017

in 2017, with an overall funding



Personalized Wellness is a top 5 investment area; Femtech raised funding of

~\$1B since 2014

The first patient-to-clinician mobile application for tracking gestational diabetes was approved by NHS in 2017 to be part of

A mobile colposcope that uses smart phones

for cervical cancer screening received FDA

Device for first time in 2017.

NHS Digital Tools Library.

approval in 2016.



Frost & Sullivan can provide end-to-end consulting and research services for developing a Femtech market strategy

Opportunity Assessment and

Competitive Insights

Femtech applications, their intensity of use and

Analyze applications essential to support healthcare professionals everyday work with women patients

Evaluate the decision making process towards

the selection of a Femtech application/company

Assess the unmet needs and preferences of

women patients across the care continuum

Stakeholder Mapping and

Consumer Research

- Identify current and future drivers and motivating factors for patients and healthcare professionals to use Femtech
- Segmenting the market based on the lifestyle and behavioural patterns of a women consumer to better position personalised products and
- services in the future Frost & Sullivan has expertise in the key women's health application areas

Identify addressable gaps in the market that companies focusing on Femtech can cater to and the differences across regions/application areas

Assess the current state of awareness of

purpose, as well as evolution in the future

conventional medical devices. bio-pharmaceuticals and clinical diagnostic companies to tap into the Femtech market

Femtech applications are offered either by or

Analyze business models through which

in association with healthcare providers

Perform opportunity assessment for

and can serve as growth partners in identifying opportunities in Femtech

Femtech – Time for a Digital Revolution in the Women's Health Maternal and Infant Digital Solutions

 Interventional Oncology Solutions in Breast Care Women's Healthcare

Breast Imaging Systems – Technologies and Software

Women's Cardiology Diagnostics

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Women's Urology Diagnostics

Women's Oncology Diagnostics

Women's Reproductive Health Diagnostics

Prenatal Diagnostics

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ww https://ww2.frost.com/frost-perspectives/femtechtime-digital-revolution-womens-health-market/

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emerging economies?

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