



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	Pregnancy & Nursing Care	Pelvic & Uterine Healthcare	General Healthcare & Wellness
<ul style="list-style-type: none"> Fertility solutions Period & fertility tracking At-home fertility monitoring 	<ul style="list-style-type: none"> Prenatal screening Post natal care and maternal health including breast feeding Pregnancy related conditions 	<ul style="list-style-type: none"> Pelvic wellness Uterine health Urogenital health Menstrual health 	<ul style="list-style-type: none"> Diagnostic tests and screening Nutrition and fitness Mental health Chronic disease management Homecare and elderly care Sexual wellness

Women in Healthcare —The Movers and Shakers

With the rise of **she-economy**, women are increasingly playing an influential role across the healthcare continuum as consumers, decision makers, healthcare professionals & caregivers

<p>90% of women are primary healthcare decision makers for their family and key influencers for friends</p>	<p>80% of the household healthcare spending is done by women. Working-age females spend 29% more per capita on healthcare compared to males in the same age group</p>	<p>50% of global healthcare customers are women and they are the primary caregivers for the elderly and children</p>
<p>80% of healthcare professionals are women. Most are nurses, and <40% are in executive or managerial positions</p>	<p>66% of women internet users look online for healthcare information. Women are 75% more likely to use digital tools for healthcare than men</p>	<p>4% of CEOs & 21% of Board Members at Fortune 500 healthcare companies are women and this is expected to increase</p>

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
<p>2014: \$18 Trillion</p> <p>2020: \$24 Trillion</p>	<p>China: \$16 Trillion</p> <p>United States: \$22 Trillion</p>

Economic contribution of women will be larger than the economy of China and the United States respectively by 2020

* Money obtained in return for labour or services
Source: Frost & Sullivan's research study "The Next Frontier of Growth + Women as Corporate Customers" 2017

Global Investments in Femtech	New Age Applications
<p>\$11.5 Billion</p> <p>227 Digital Health Deals in 2017, with an overall funding of \$11.5B</p> <p>Personalized Wellness is a top 5 investment area; Femtech raised funding of ~\$1B since 2014</p>	<ul style="list-style-type: none"> The first mobile application for contraception received CE approval as a Class 2 Medical Device for first time in 2017. The first patient-to-clinician mobile application for tracking gestational diabetes was approved by NHS in 2017 to be part of NHS Digital Tools Library. A mobile colposcope that uses smart phones for cervical cancer screening received FDA approval in 2016.

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

Stakeholder Mapping and Consumer Research	Opportunity Assessment and Competitive Insights
<ul style="list-style-type: none"> Assess the unmet needs and preferences of women patients across the care continuum 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 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 	<ul style="list-style-type: none"> Assess the current state of awareness of Femtech applications, their intensity of use and purpose, as well as evolution in the future Identify addressable gaps in the market that companies focusing on Femtech can cater to and the differences across regions/application areas Perform opportunity assessment for conventional medical devices, bio-pharmaceuticals and clinical diagnostic companies to tap into the Femtech market Analyze business models through which Femtech applications are offered either by or in association with healthcare providers

Frost & Sullivan has expertise in the key women's health application areas and can serve as growth partners in identifying opportunities in Femtech

<ul style="list-style-type: none"> Femtech – Time for a Digital Revolution in the Women's Health Maternal and Infant Digital Solutions Prenatal Diagnostics Breast Imaging Systems – Technologies and Software Interventional Oncology Solutions in Breast Care Women's Healthcare Women's Urology Diagnostics Women's Reproductive Health Diagnostics Women's Oncology Diagnostics Women's Cardiology Diagnostics 	
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