

# *Future of Femtech and Growth Opportunities in the New Normal*

Session #205, August 12, 2021

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**HIMSS** **21**

F R O S T  S U L L I V A N

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*Welcome*



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# *Conflict of Interest*

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## **Chandni Mathur**

Senior Industry Analyst, Digital  
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Has no real or apparent conflicts of interest to report.

# Agenda



What is the potential opportunity



Covid 19's co-creation of another Pandemic on Women



Digital Health and/versus Femtech?



Business Models and Strategies to Succeed



Growth Opportunities and Strategic Imperatives



## *Learning Objectives*

- Examine what is working and not working for female technology to become mainstream
- Design strategies to tap on the potential to monetize the growth opportunities
- Analyze the impact of loss from women's health issues in terms of workplace productivity and to the health systems
- Describe what strategies are required to make femtech mainstream
- Recommend investment opportunities to the venture capital and private equity community

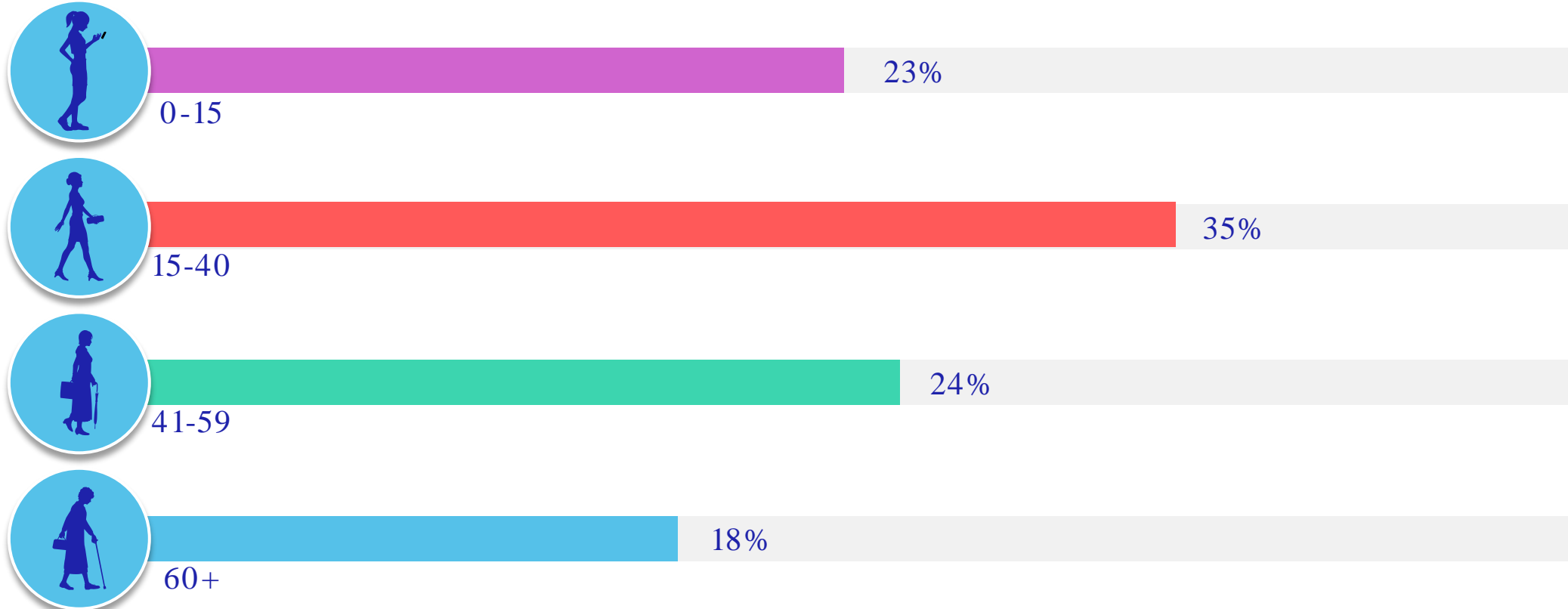




*Of the 4.2 billion women in 2030, 1.49 billion will be in the Spring of life and almost the same number (over 1 billion) will be in the Autumn stage*



### Female Population Split by Age, 2030

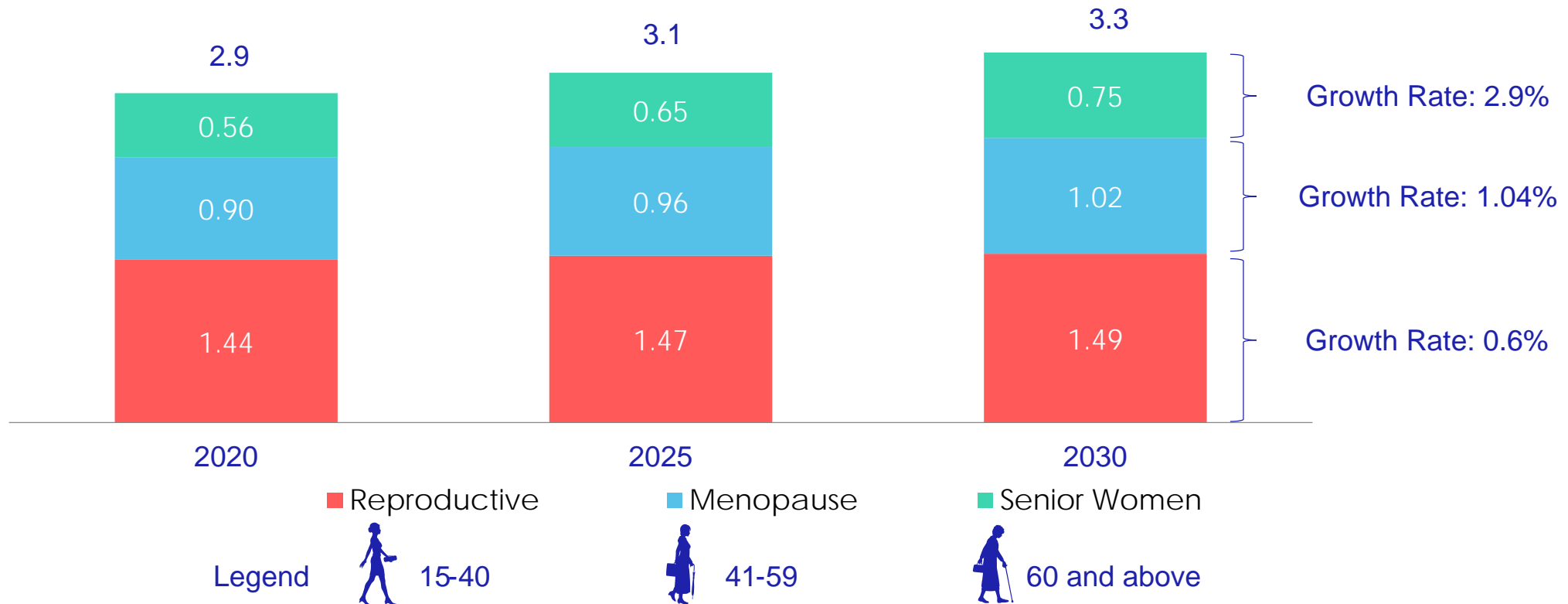


Source: OECD Frost & Sullivan

# The Growth Rate for Senior Women Will Also be Nearly 5X that of Women in the Age Group of 15-40

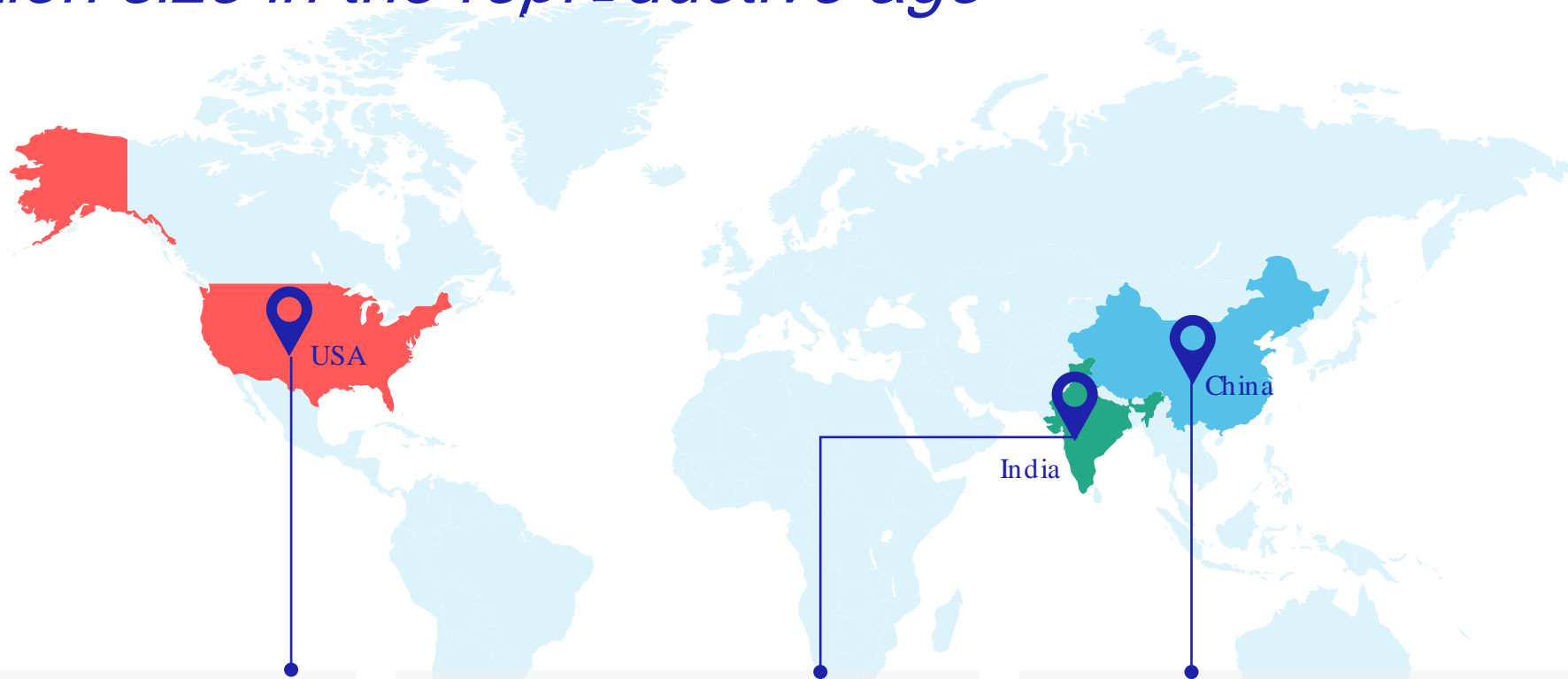


Female Population Growth Forecast (15 years+), 2020-2030 (Billion)



Source: OECD Frost & Sullivan

*In 2030, over 40% of the female population over 60 years will come from China while India boosts the largest population size in the reproductive age*



In the United States in 2030, **52%** of the female population will be 40+ and **31%** of the population will be in the reproductive category – 80% of the market will be ripe for Femtech solutions

Women in the reproductive age group will hold a majority of the female population in India – **40% in 2030**  
This represents a strong growth area for menstrual, fertility and pregnancy solutions.

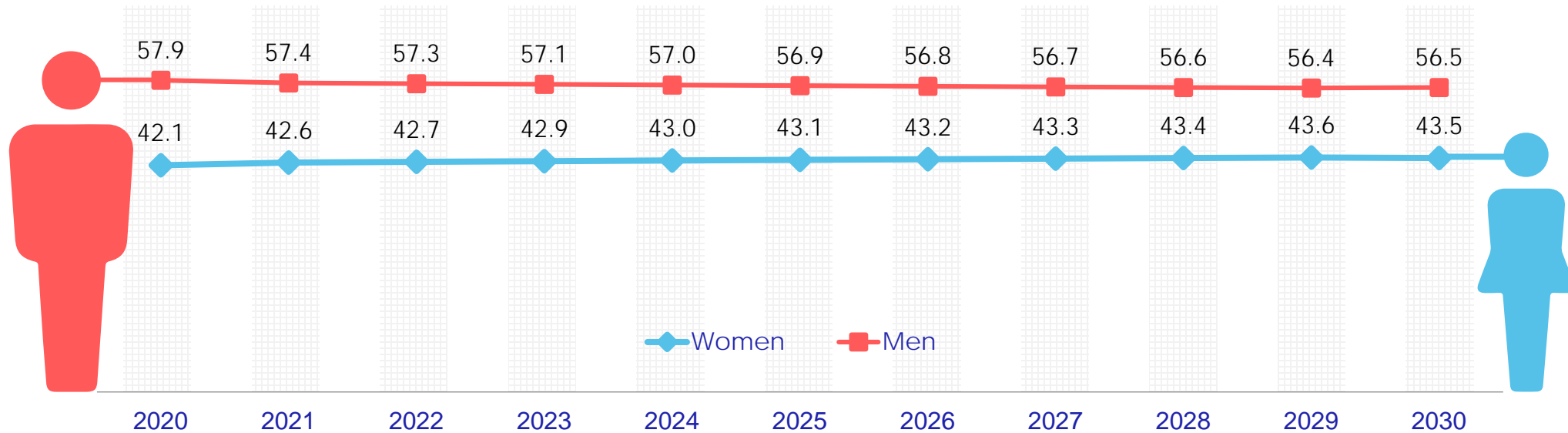
Nearly half (47%) of the female population in China is 60 years and above rendering it heavily burdened by **senior care**



# Equipping Women With The Right Tools Can Enable Increased Global Economic Growth



Contribution of Women & Men towards Global GDP (%), 2020-30



In 2020, only about **50%** of women participate in the labor force, compared with **80%** of men



The losses to an economy from economic disempowerment of women were estimated to range from **10-30%** of GDP

\*Includes analysis of top 25 countries with GDP more than \$500 billion.

Source: IMF, World Bank, UN, Frost & Sullivan

# Women Are Highly Marginalized Today



## At Home



Spend **4.1 hours/day** on domestic work compared to 1.7 hours/day in case of men



Women are **8X** more likely than men to look after sick children /elderly or manage their children's schedules



## At Work

Working women spend **29% more** per capita on healthcare as compared to men



## For Health

Healthcare has been designed and developed by men for men.

Women are under-represented in clinical trials (1/3<sup>rd</sup> the trial population)



Men's health issues such as erectile dysfunction **get 5 X the research grants** as compared to women's health issues like pre menstrual syndrome (90% occurrence)

Source: UN Women, HIT Consultant, Forbes, NCBI, Frost & Sullivan

# The Pandemic Is Deepening Pre-existing Gaps, Exposing Vulnerabilities...



Women were adversely affected by the pandemic in different realms of day to day life



## At Home



**1 in 3 women** have experienced physical/sexual violence



Lockdown increased burden of care on women



## At Work



In 2020, women lost 64 million jobs translating to **\$800 billion** in earnings



40-50% of senior level executives and mothers were burnt out at work



## For Health



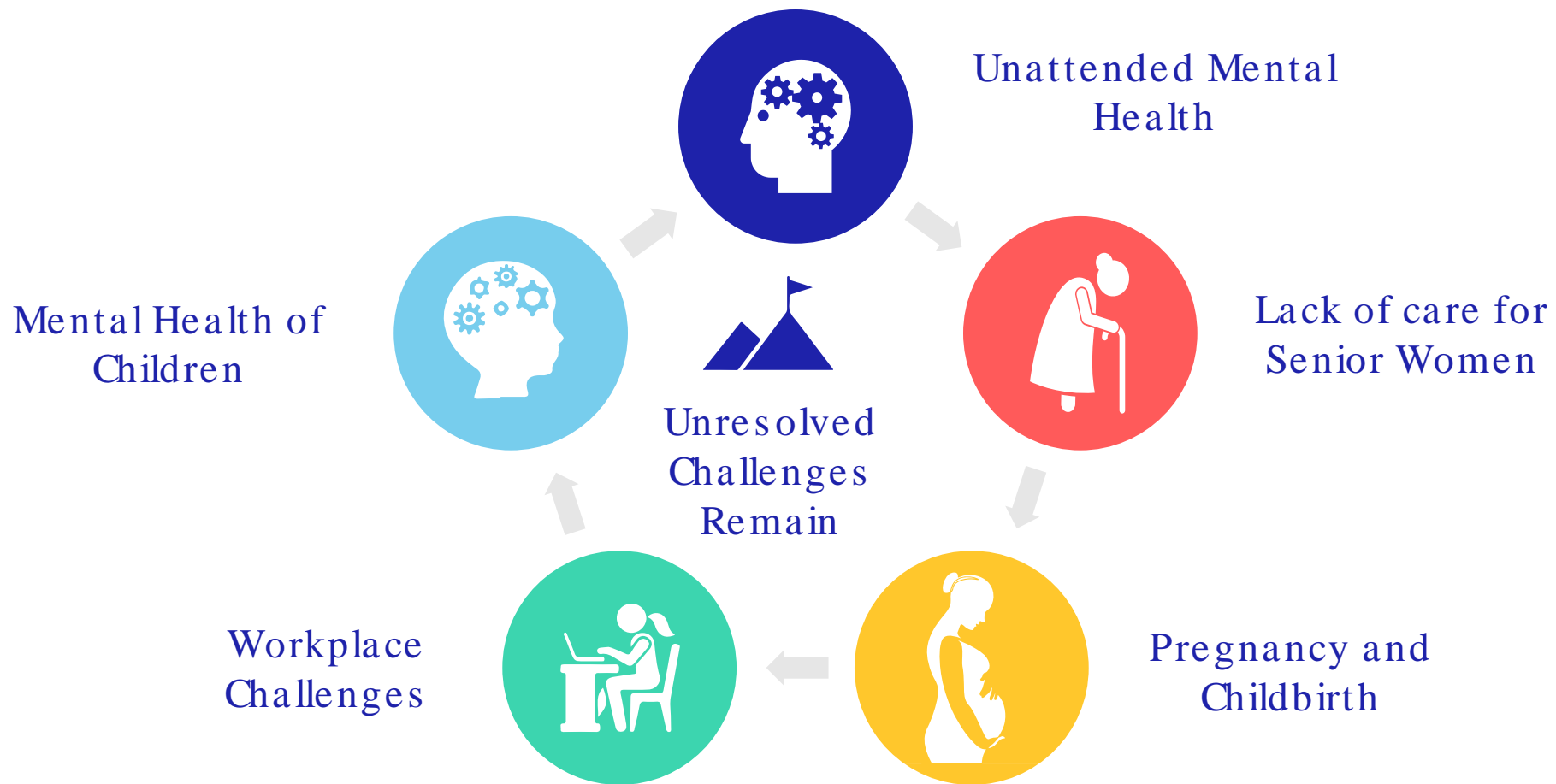
There could be **7 million** unintended pregnancies – leading to maternal mortalities



Over **70%** of women reported clinically significant anxiety or depression

Source: CNBC, UNFPA, JAMA Network, Frost & Sullivan

# ...And Unresolved Challenges Remain



Source: CNBC, UNFPA, JAMA Network, Frost & Sullivan

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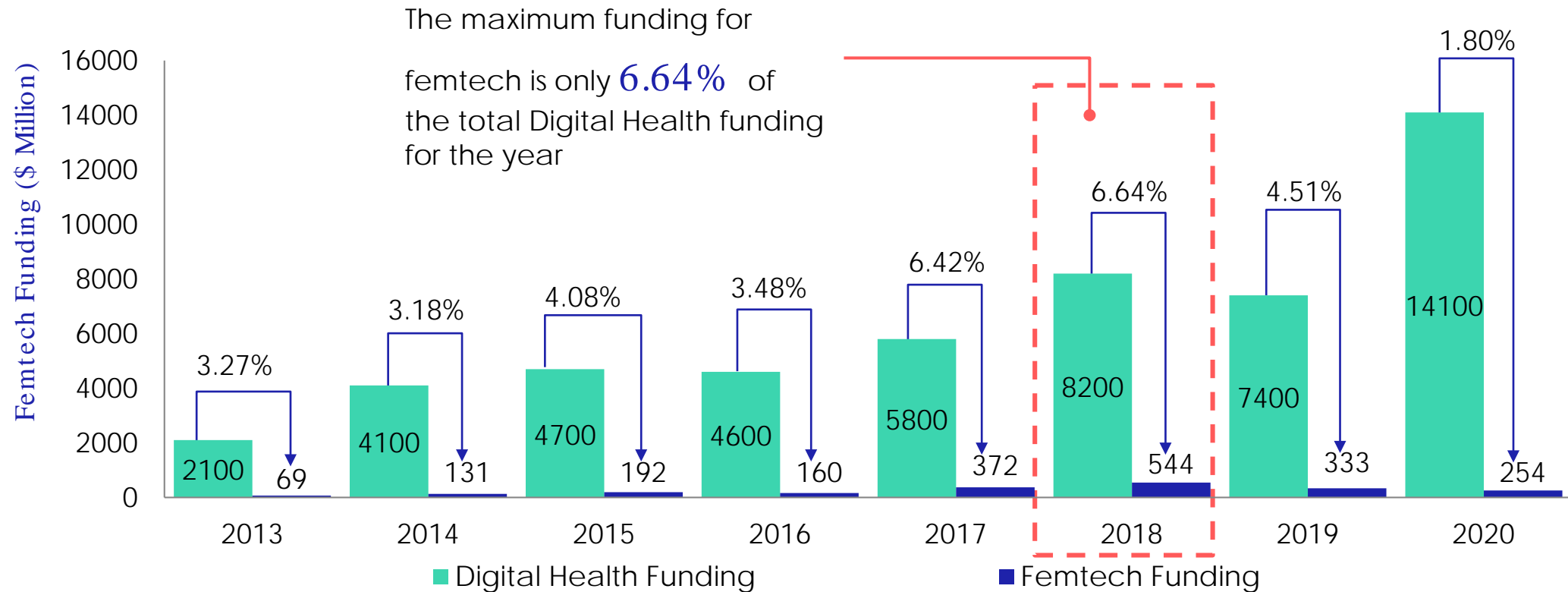
*Are we moving in  
the right direction  
to support these  
women in 2030?*

*We are not...*

# Femtech Still Continues To Be The Step Child For Digital Health...



## Digital Health vs. Femtech Funding: Global, 2013 – 2020



Source: Rock Health (for Digital Health Funding), Frost & Sullivan



# ...With Several Barriers To Realize Its Full Potential



## Barriers for Funding



Lack of women as VCs and accelerators



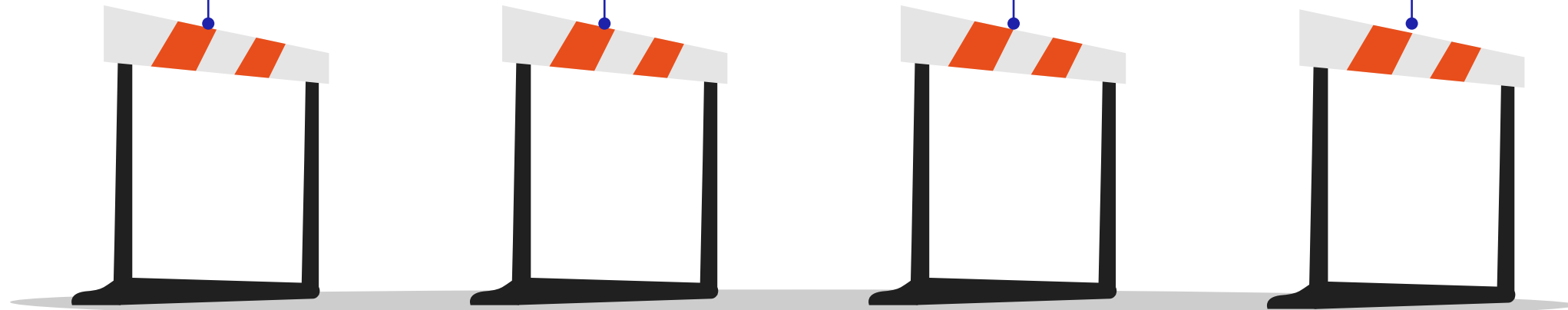
Femtech apps are sometimes created by men



Pitching to male investors still remains a hurdle



Societal taboos

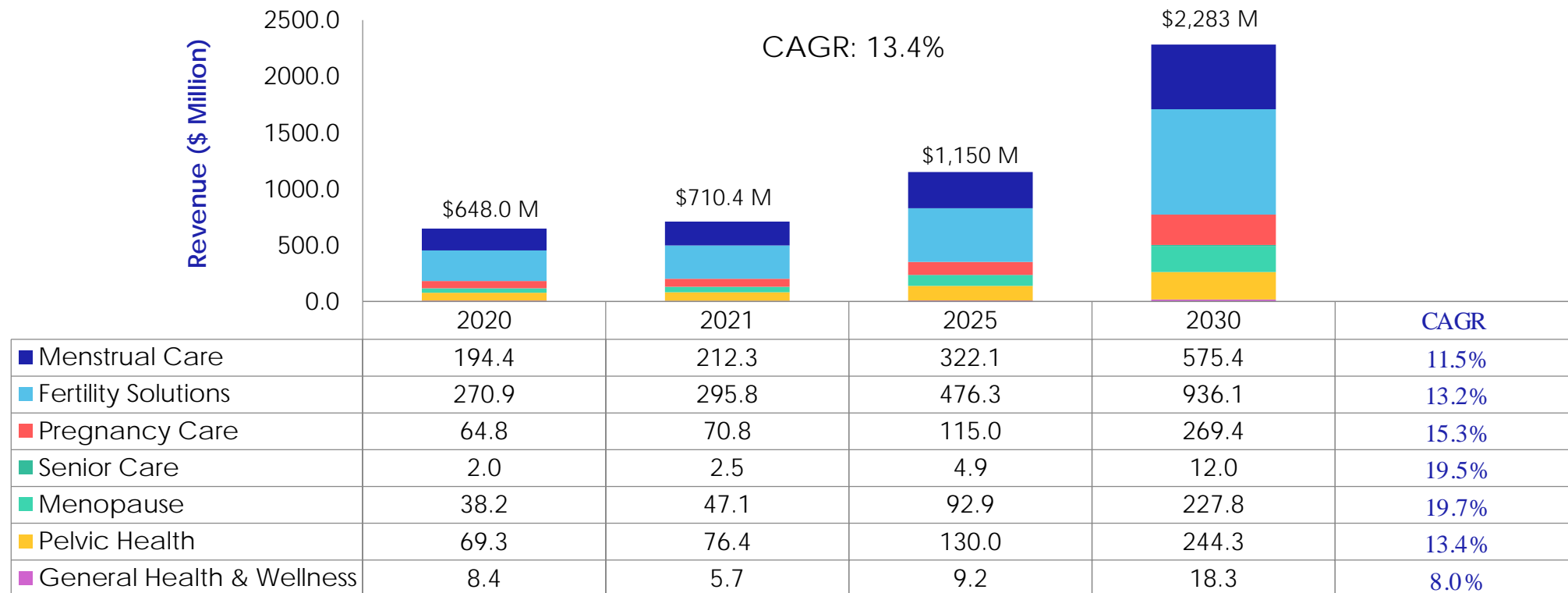


Source: Frost & Sullivan

# While Reproductive Health Solutions Will Continue To Hold 78% of the Market, Menopause And Senior Care Segments Will Witness The Fastest Growth of Over 19%



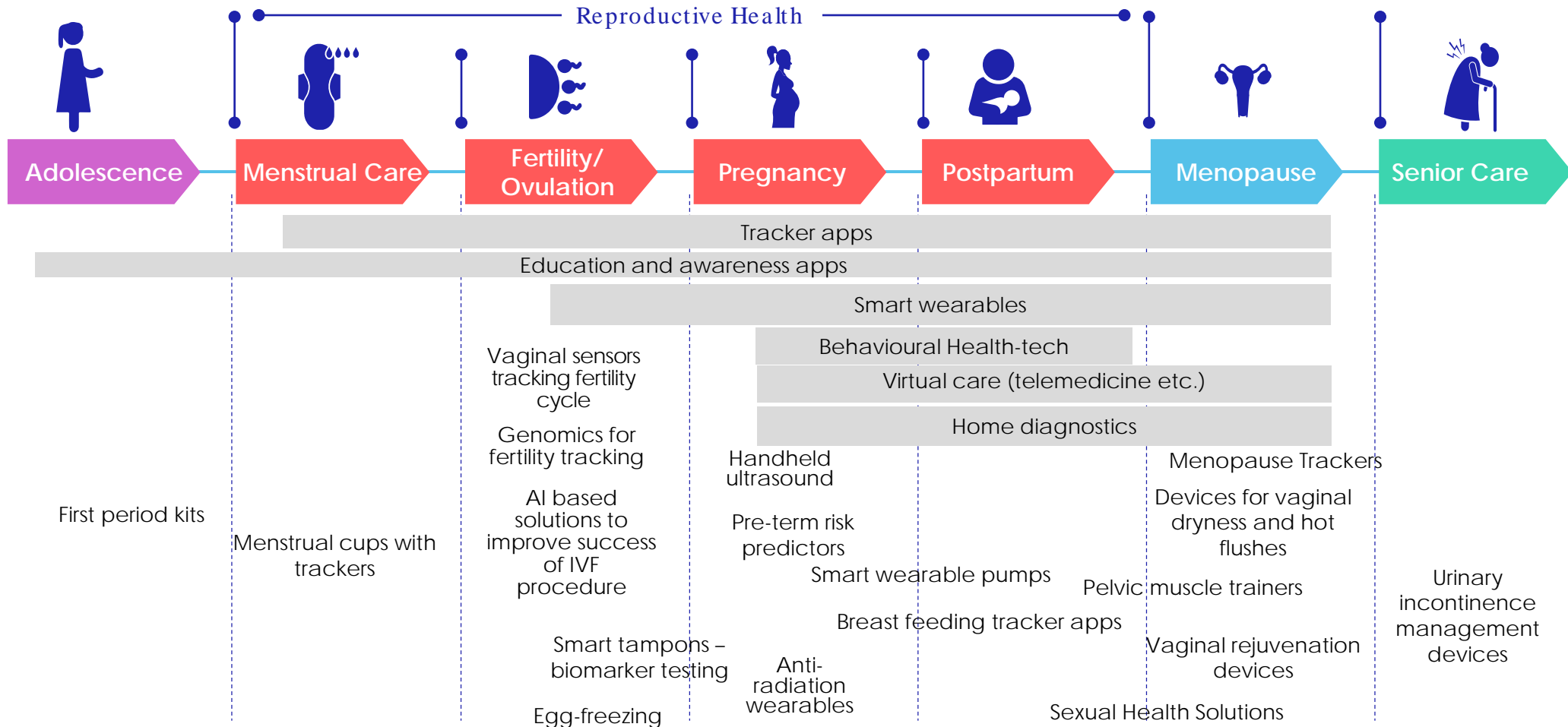
## Femtech Solutions Market: Revenue Forecast, Global, 2020-2030



\* Includes only digitally enabled solutions

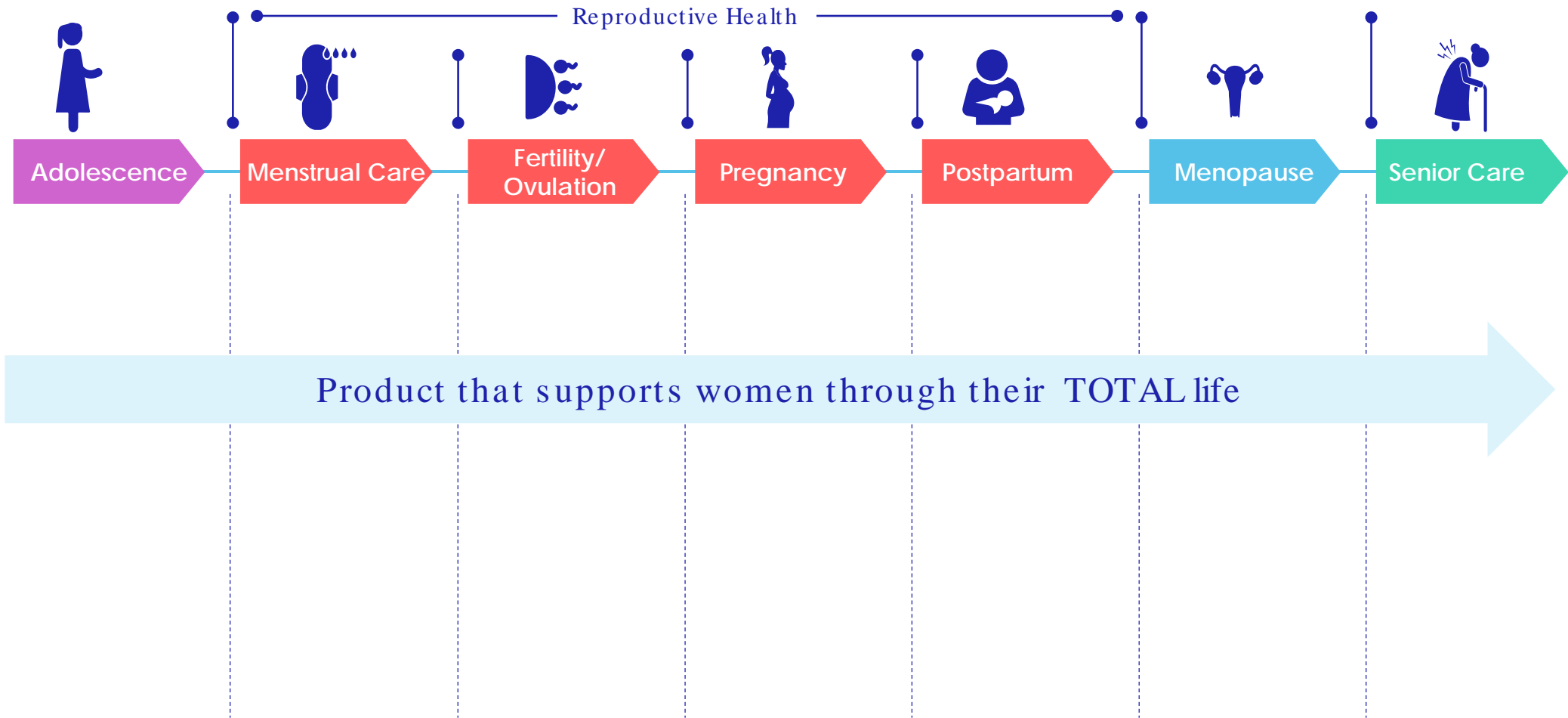
Source: Frost & Sullivan

# The Current Solutions in the Space include...



Source: Frost & Sullivan

# Fast Forward to 2030 –the Focus will Shift to an All-Inclusive Solution



Source: Frost & Sullivan



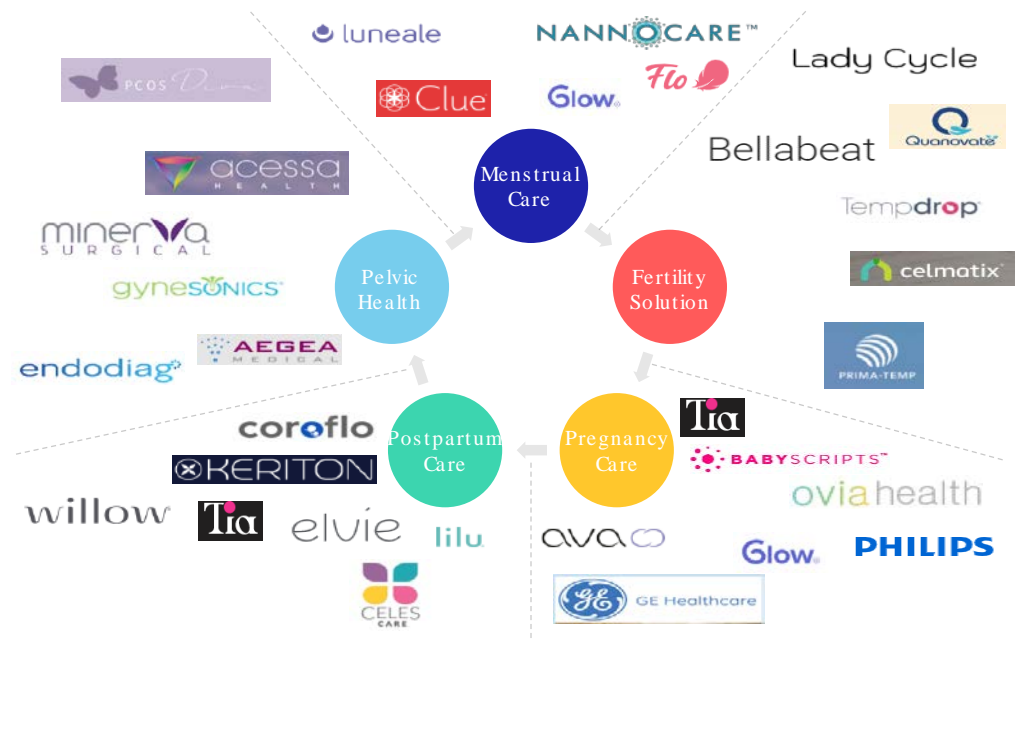
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# *Market Landscape*



# Reproductive Health – Growth Opportunities

Competitive differentiation has been the prime focus in this segment as they are already saturated.



What will be needed in 2030

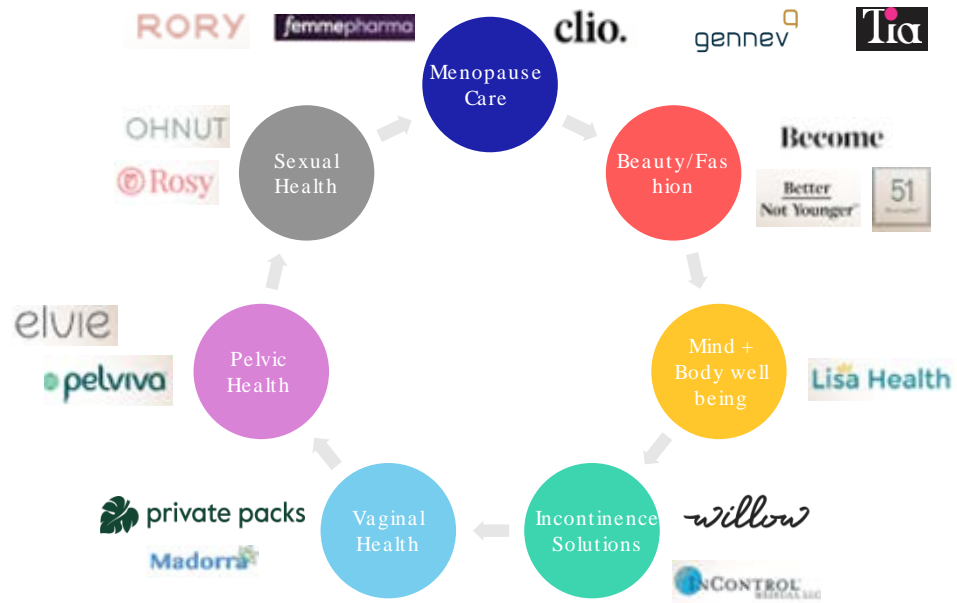
- Integrated, on the go solutions

Source: OECD, Frost & Sullivan



# Menopause Care – Growth Opportunities

Services dominate the menopausal care solutions space.



What will be needed in 2030

- Continuous monitoring of health and wellness

Source: OECD, Frost & Sullivan

# Senior Care– Growth Opportunities

Glaring gap with very few solutions in the market currently





## What will be needed in 2030

- Tech enabled senior care homes
- Need for easy-to-use solutions

Source: OECD, Frost & Sullivan

# Reproductive vs Menopause & Senior Care—the War for Dollars

	 <b>Reproductive Health (15-40 years)</b>	 <b>Menopause and Senior Care (40+ years)</b>
Percentage of Population (2020)	37%	38%
Median Income (US)	\$29,000	\$47,500
Number of Solutions	Over 100	~20

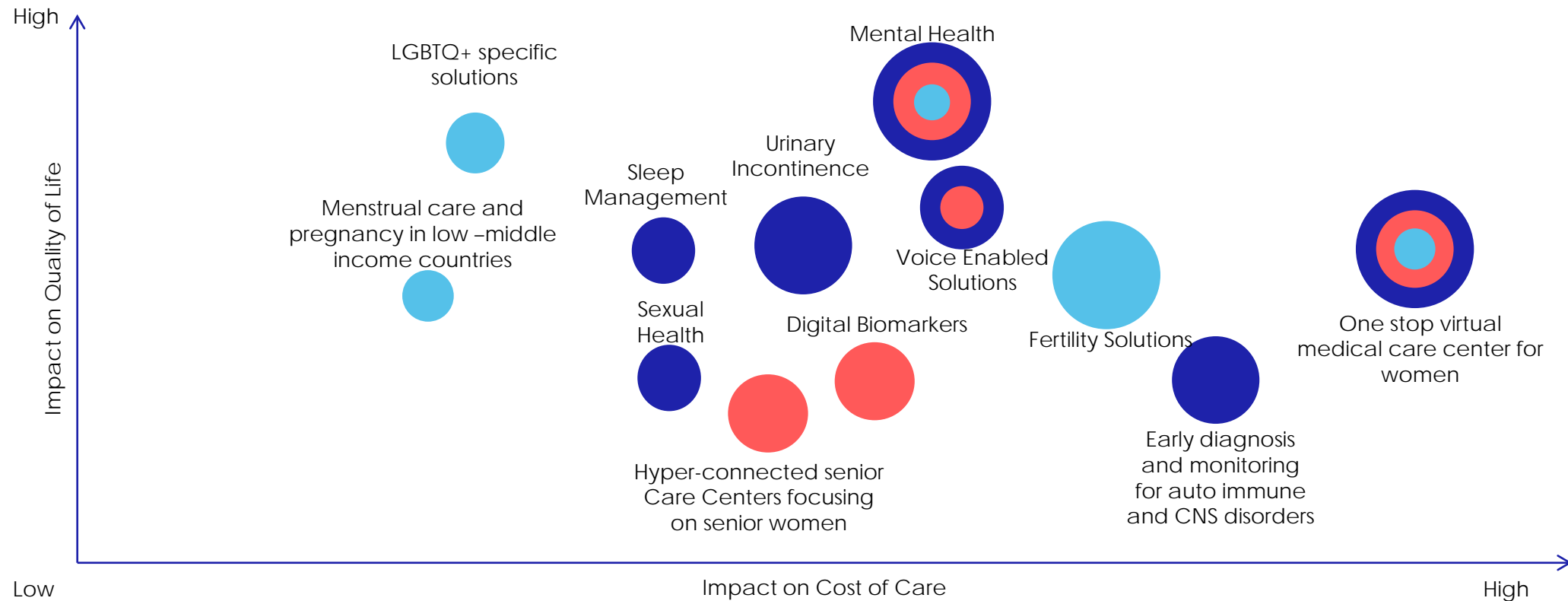
Source: OECD, Frost & Sullivan

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# *Growth Opportunities*



# Top 12 Growth Opportunities in 2030



Reproductive



Menopausal



Senior Care

Size of bubble represents opportunity size in 2030

Source: Frost & Sullivan

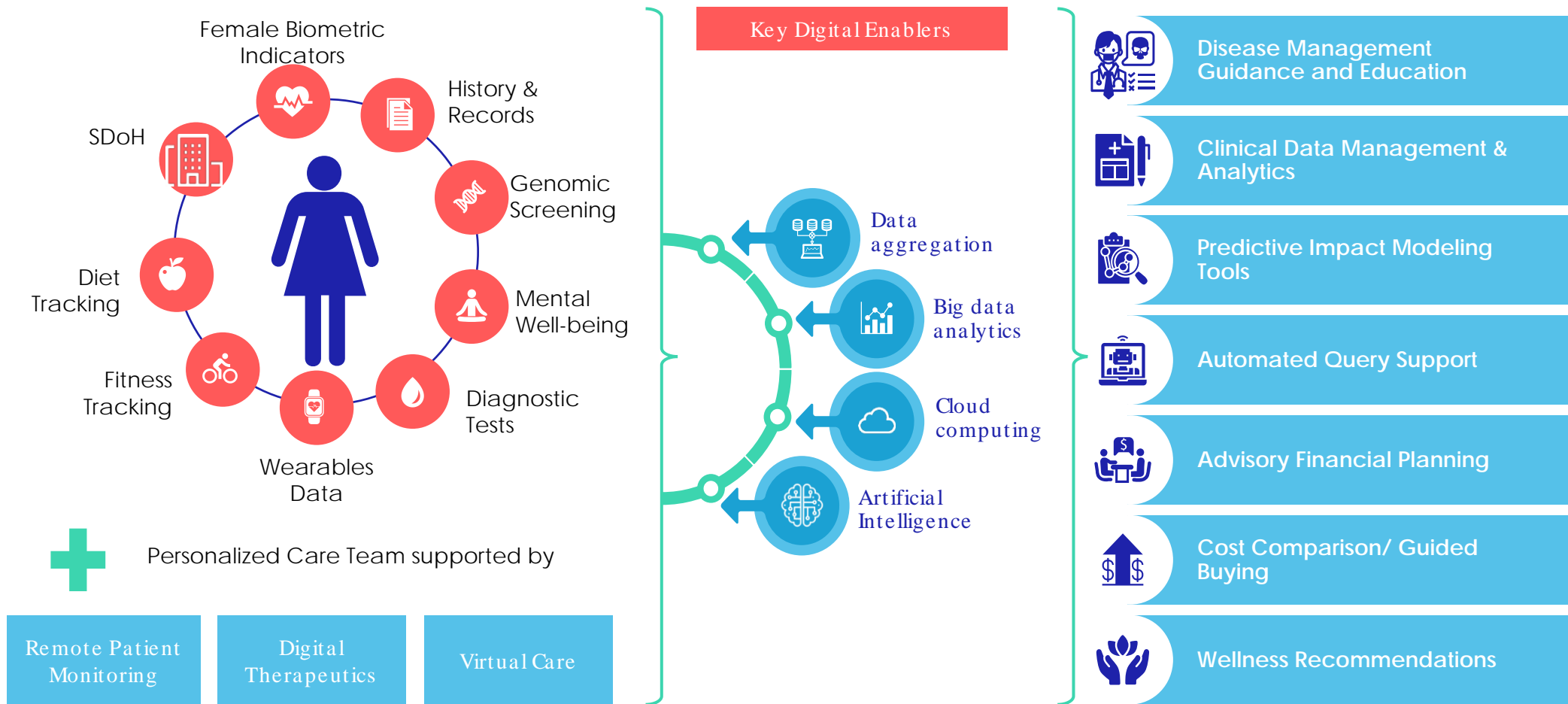


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*The next big transformation in women's health is the creation of a women-centered digital twin.*

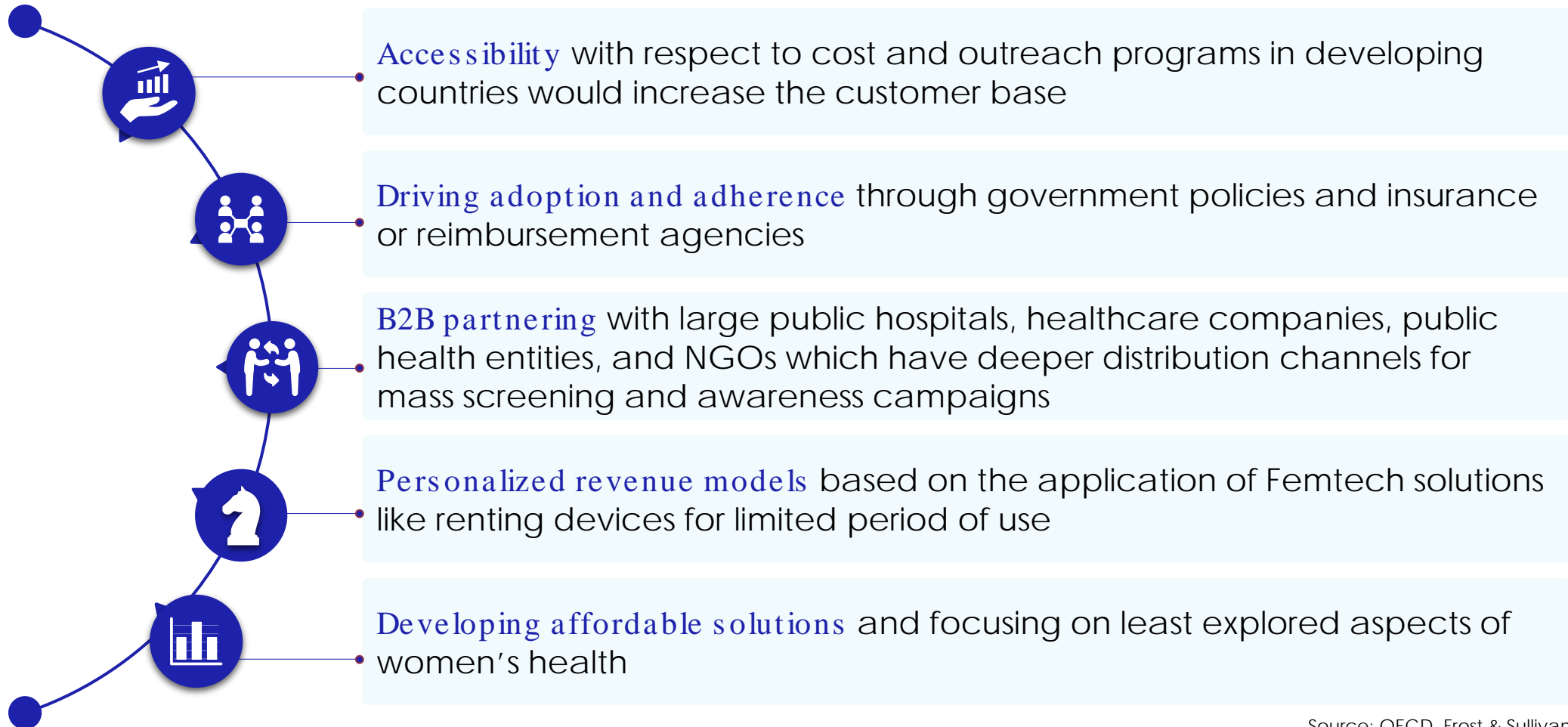


# A Quantified Woman will Form the Center of Holistic Womens Health Model



Source: Frost & Sullivan

# Strategic Imperatives for Success: The Urgency To Become Mainstream



Source: OECD, Frost & Sullivan

## *Future Strategic Directions*

- The future is in **gender specific** health and wellness
- Healthcare is not a product. It is sum of a women's genetics, way of life, our daily experiences and events, **"Our zip code is the single largest predictor of health"**
- Our definition of Healthcare needs to change. Health is more than the absence of disease. Focusing on diseases will not be profitable or sustainable long term to create healthy communities and countries.
- The future lies in **building communities** around health-enlisting businesses, medical providers, government and nonprofits to work together.



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# *Questions*



*Thank you!*



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