



FemTech in the UK

Industry Landscape Q3 2022

October 2022

www.femtech.health

FemTech in the UK Industry Landscape Q3 2022

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Introduction

The '**FemTech in the UK Industry Landscape Q3 2022**' report aims to showcase recent developments, current state, and short-term projections of the emerging national market.

Based on the assembled and analysed information, the report introduces key features, trends, industry innovations, technologies, market segmentation, and perspectives. The report also includes information on 100+ FemTech personalities in the country and their contribution to the development of the FemTech space.

The analytical part is based on information about **310+ organisations** related to the **UK FemTech market**, including **145+ companies**, **5+ hubs and communities**, and **155+ investors** considered by sectors. The report covers UK companies with a direct and indirect focus to advance women's well-being. Selected companies are addressing the following specific FemTech sectors: Reproductive Health & Contraception, Pregnancy & Nursing, Menopause Care, Menstrual Health, General Healthcare, Sexual Health, Pelvic & Uterine Healthcare, Women's Wellness, Longevity, and Mental Health.

Interviews with UK influencers are included to showcase the local market features, challenges, and opportunities in FemTech.

Report Methodology and Approach

Company

We consider a **company** to be FemTech if

- female health technologies is the core for company operations/production;
- the company's activity description includes a clear and straightforward affiliation to the FemTech Industry;
- the company develops FemTech-focused products/services/projects;
- at least one self-sufficient department or direction of activity work in the FemTech Industry;
- the organisation has a subsidiary that works in the FemTech Industry.

Investor

We consider an **investor** as FemTech-focused if

- the organisation is a venture fund investing in high-growth companies that significantly improve access, care, and outcomes in women's health;
- the organisation focuses on emerging technologies, products, and services improving women's health and wellness for all age categories.

We acknowledge that scope and priorities may change as the industry grows. We continuously improve the methodology as the industry progresses.

Technologies Used in Our Research



Data Aggregation and Analysis

Supervised and unsupervised Machine Learning

Deep neural networks

Natural language processing

Data parsing

GARCH model



Clusterisation and Competitor Analysis

Brownian motion modeling for stock market forecasts

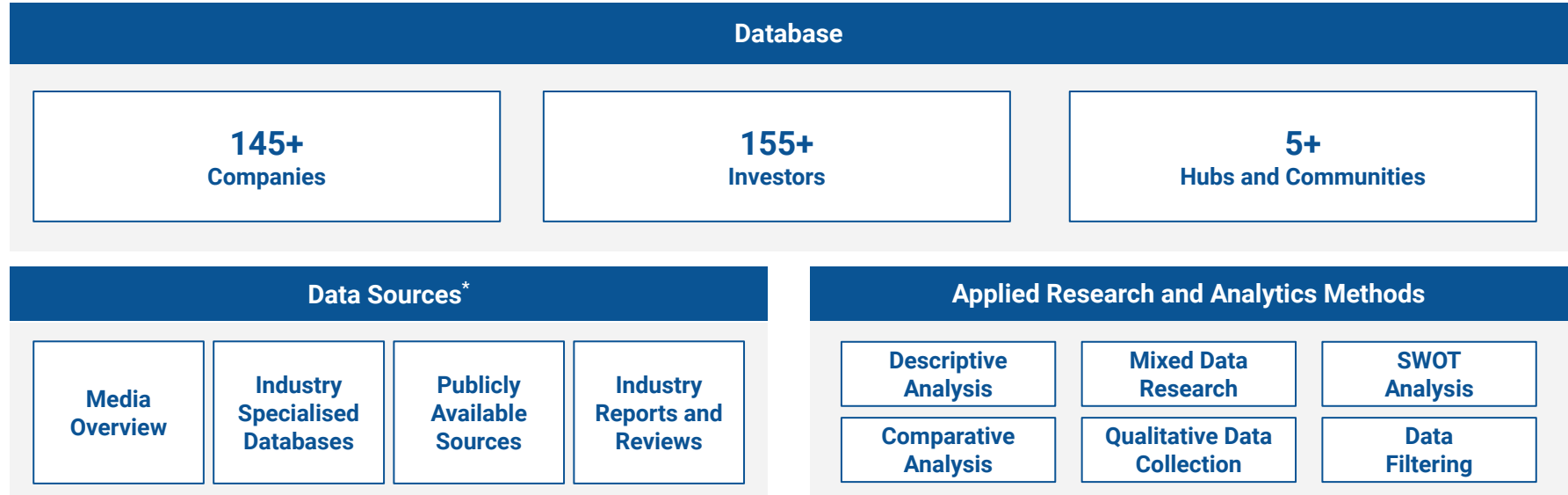
Real option analysis, scenario planning

K-means algorithm for companies clusterisation

Calculation of the distance between companies in multidimensional space

Using tag clouds to categorise companies

Report Methodology and Approach



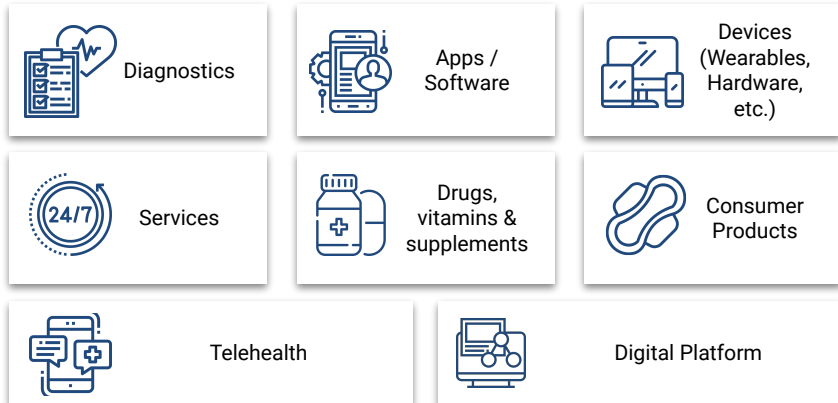
Containing a comprehensive overview of the FemTech Industry, the report relies on various research methods and analytics techniques. Although there are varying views on the definition of FemTech, our definition on p. 5 is based on industry research, ecosystem feedback, and expert advice. This definition guides the research of this report. FemTech Analytics is not responsible for the quality of the secondary data presented herein; however, we do our best to minimise possible risks by cross-checking data and using different analytics techniques. Please note that we did not deliberately exclude certain companies from our analysis due to the data-filtering method used or difficulties encountered. In fact, the main reason for their non inclusion was incomplete or missing information in the available sources.

FemTech Market Definition

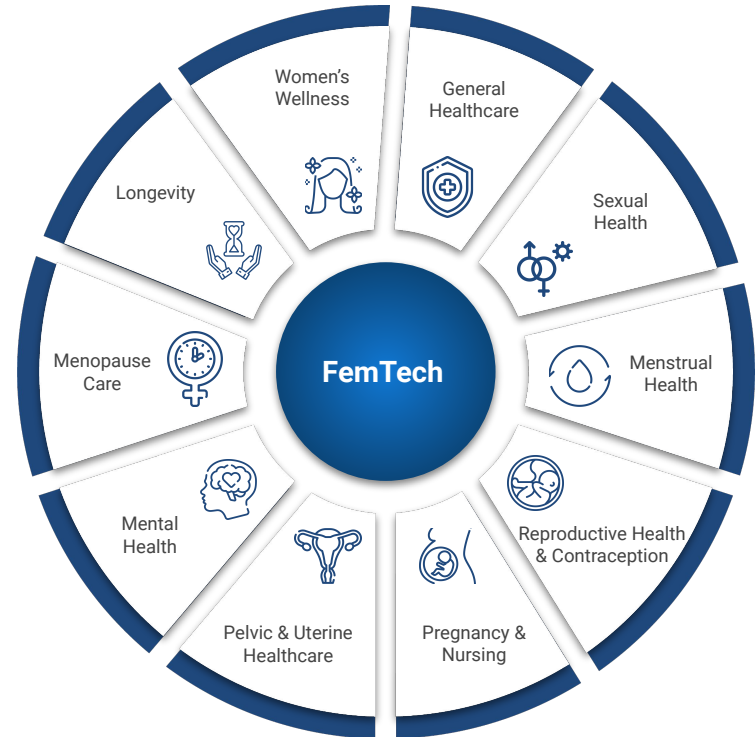
FemTech Definition

FemTech (Female Technology) is technology empowering women's health and well-being. This term is often applied to products, services, applications and software, medical devices, telehealth, wearables, hardware, therapeutic drugs, vitamins and supplements, digital platforms, and consumer products designed to improve or support women's health, including but not limited to those who identify as cisgender women and gender or sexual minority women.

Product Types



Subsectors*



FemTech Market Definition



Reproductive Health and Contraception includes fertility solutions and tracking, contraception, at-home fertility monitoring, ovulation and pregnancy testing, products and services for Polycystic Ovary Syndrome (PCOS) patients addressing infertility, software and applications to improve women's reproductive health and fertility knowledge.



Pregnancy and Nursing include a variety of solutions on maternal, fetal, neonatal health to assist throughout the pregnancy and postnatal period and help to be connected to healthcare professionals. The category includes solutions addressing the decrease of maternal and child mortality, preterm births; prenatal genetic screening and carrier testing; physical and mental female wellness during pregnancy, postpartum and parenting; education on pregnancy and lactation, tracking of feeding time and health of the child.



Longevity includes technologies and software to advance women's healthspan and increase Longevity. The Longevity category includes solutions for detection, monitoring, and treatment of chronic diseases, and biometrics and lifestyle solutions.



Pelvic and Uterine Healthcare includes solutions to improve pelvic organs as it plays an important role in complete physical, mental, social, and sexual well-being. The subsector includes preventive care, treatment, diagnostics, testing and screening of pelvic organs (uterus, cervix, ovaries). Conditions are, but not limited to: prolapse or sagging of the organs, problems with bladder and bowel function, weakening of pelvic muscles and connective tissues, cancers, endometriosis, incontinence, and other affecting the proper function of a woman's pelvic organs.



Menstrual Health includes products, services and initiatives that address issues of those who menstruate through the four phases of the menstrual cycle (menstruation, the follicular phase, ovulation, and the luteal phase) to achieve the complete physical, mental, and social well-being. This category also considers femcare products such as innovative, natural, and sustainable hygienic pads, tampons, cups, period-proof underwear, etc.

FemTech Market Definition



Menopause Care: FemTech start-ups address the symptoms of menopause in innovative ways to improve life for those who are experiencing menopause later in life, as well as better predict when it is likely to hit the menopause phases, how menopause could be affected due to experiences in other life phases (menstruation, fertility, pregnancy, etc.) and better community support for those who are experiencing menopause.



Women's Wellness includes innovative femcare (except products for menstruation) products, nutrition and fitness solutions, and products and companies that encourage a holistic approach to wellness. Nutrition & Fitness comprises solutions specific for women with a focus on body positivity, fitness apps that adjust workouts to health phases, and nutritional programmes/apps specific to women's health realities. Some examples could include an app that provides workouts as it adapts to the phase of a menstrual cycle or an app that assists with nutrition for those who have PCOS and endometriosis.



Sexual Health companies focus on the physical, emotional, mental, and social well-being related to sexuality and sex and intimate hygiene. Sexual health is another area continuing to emerge with new mobile app solutions to help women obtain contraception, innovative hardware to achieve orgasms, prevent, test, and treat STDs and access sex education tools and resources.



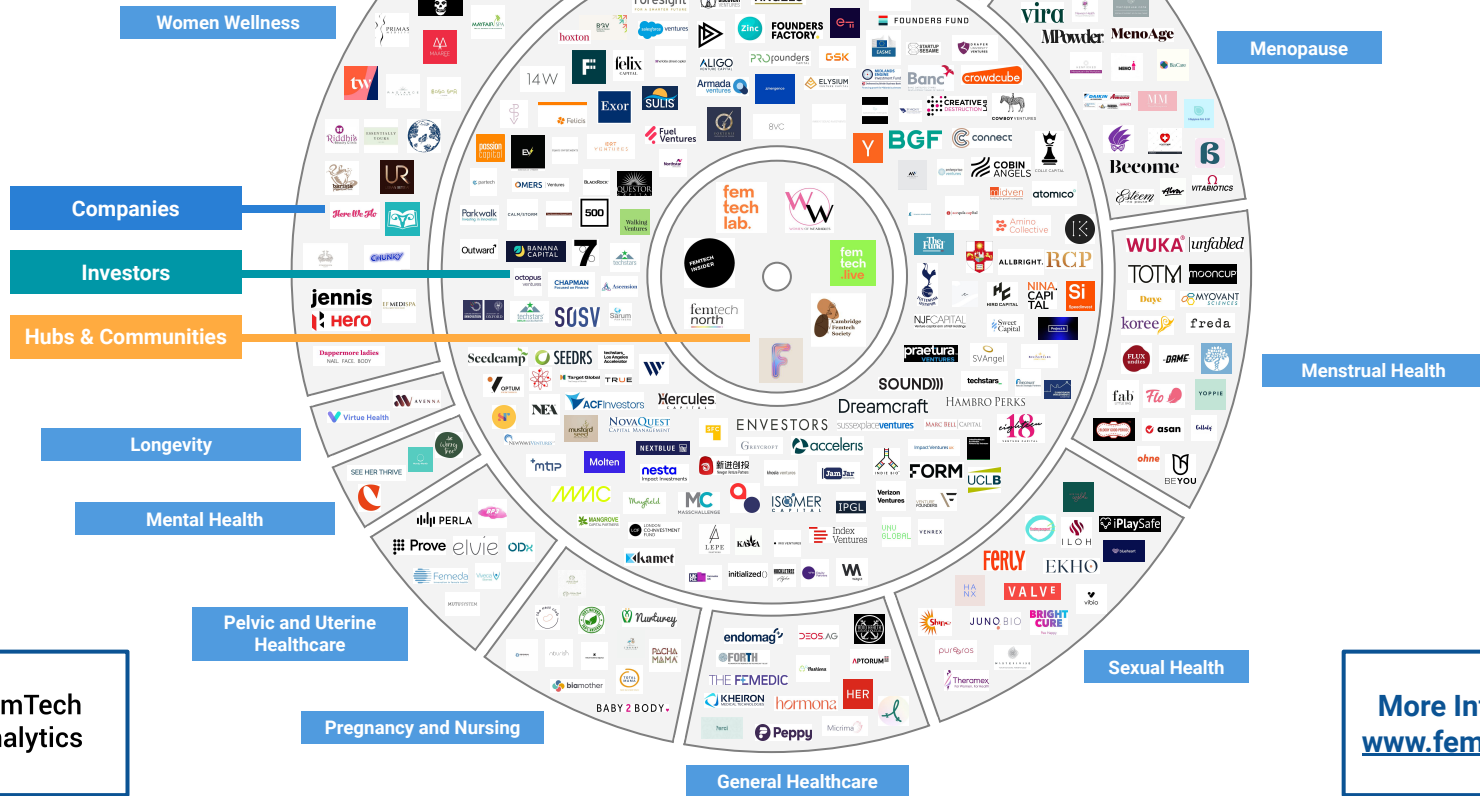
Mental Health includes technologies and software to improve emotional, psychological, and social well-being. It affects how women's think, feel, and act. These companies also help determine how women handle stress, relate to others, and make choices, as well as empowerment solutions.



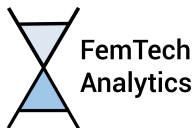
General Healthcare includes health promotion, preventive care (immunisation, general health screening), hormonal health, treatment of acute and chronic illness, autoimmune diseases, breast cancer, and appropriate referral for more specialised needs where required. Also this subsector includes testing through the women's healthspan. Some examples, but not limited to, are osteoporosis testing, breast cancer testing, infectious disease testing, ultrasound tests. The category embraces any health conditions, not included in other specific subsector.

FemTech Industry in the UK Landscape Q3 2022

Companies – 145
Investors – 155
Hubs & Communities – 7



More Information:
www.femtech.health



Executive Summary

The FemTech market is underestimated in the UK, which results in missing data sets and a lack of understanding, diagnosis, and treatment of many gynaecological conditions that impact women's health. FemTech Analytics researched and analysed 145+ companies related to FemTech in the UK. Wearables, mobile apps, home testing devices, or kits drive the development of the UK FemTech market. In addition, the market is beginning to change, with the emergence of companies beginning to collect large amounts of new data, conduct subsequent research studies, and develop new means of treatment.

Selected companies are addressing the following specific FemTech sectors: Reproductive Health & Contraception, Pregnancy & Nursing, Menopause Care, Menstrual Health, General Healthcare, Sexual Health, Pelvic & Uterine Healthcare, Women's Wellness, Longevity, and Mental Health.

FemTech companies work based on the following technologies: Application Software, Apps B2C Information platform, Therapeutics/Wearable devices, Preventive Medicine, AI and ML solutions.

UK FemTech is a burgeoning, upstart industry with a rapidly growing public profile, increasingly diverse applications, heightened investor attention, set to have an increasing share of the capital directed at healthcare.

Key Figures and Facts: FemTech in the UK

145+

Companies

155+

Investors

5+

Hubs and
Communities

10

Subsectors

57%

of FemTech
companies offer
Diagnostics,
Consumer products,
Devices & Software

24%

of FemTech
companies address
Reproductive Health &
Contraception, and
Pregnancy & Nursing

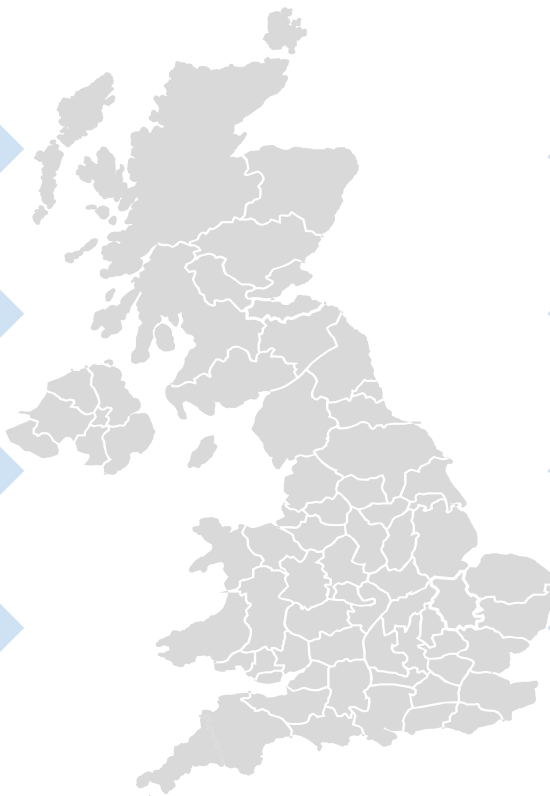
Why UK?

The FemTech market is expected to expand in Europe. The recent elimination of a tampon tax in the UK and free female sanitary products initiative in Ireland are examples of this.

At the end of 2020, an accelerator FemTech Lab was founded in London to support more innovative companies in establishing their presence in the FemTech Industry.

Apps offering fertility support and websites targeting menstrual health are just a few of the tech innovations available to women in the UK nowadays.

One in three women in the UK will suffer from a reproductive or gynaecological diseases. However, it is not just reproductive health – indeed there is a high predominance of chronic health problems among women.



The term 'FemTech' was created only a few years ago, but the industry is expected to be worth \$60 billion by 2027.

In the UK, the signs of upcoming consolidations and M&A deals in FemTech emerge, so there will be more public companies that will integrate various subdomains.

In the UK, more products will appear for the audiences whose needs are underrepresented today, such as women in menopause.

In the UK's FemTech Industry, there will be a large market growth on top of the funnel as founders and VCs will see more success stories in the industry.

FemTech in the UK: Market Overview

FemTech in the UK at a Glance

145+
Companies

155+
Investors

5+ Hubs and
Communities

Over **50%**
covered by top three
product types

10
Subsectors

10%
of companies are UK
based

60%
covered by top four
subsectors

100+
FemTech Leaders

The FemTech Industry can be divided into **10 subsectors** covering all aspects of women's health, ranging from Reproductive Health and Contraception to **Longevity and Mental Health**. The report covers **149 companies** and **157 investors**. **Women's Wellness, Reproductive Health & Contraception, Menopause Care, and Menstrual Health** are the **largest subsectors**, accounting more than **60% of the entire industry**.

Women's Health Strategy for the UK

The Women's Health Strategy for the UK will establish **an ambitious and positive new plan for women's health**, with women's voices at the forefront. There is an absolute proof of the **need for increased focus on women's health** and to acknowledge and work on the inequalities.

Background Facts

In the UK, women live longer than men, with life expectancy at birth in 2017 to 2019 being 83.1 for women and 79.4 years for men. However, women in the UK spend a larger part of their lives in illnesses and disability.

Women spend nearly more than a quarter of their lives in illnesses or disability, compared with one fifth for men. Furthermore, in recent years, healthy life expectancy has decreased for women but has remained the same for men.

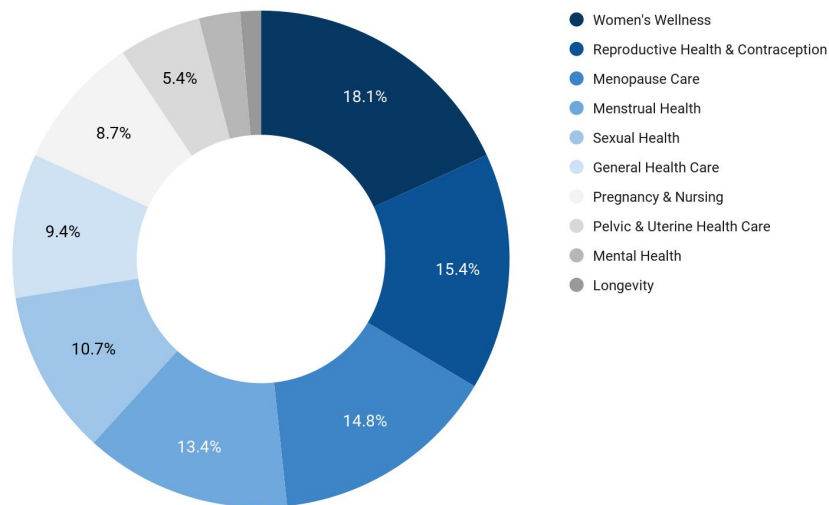
The government has ambitious targets to tackle health inequalities and broader determinants of health and to better understand the specific demands and areas of inequalities faced by women.

Six Core Themes

- 1. Placing women's voices at the centre of their health and care**
The government aims to understand more about women's experiences through communication about their health and where improvements can be made to assure they are heard.
- 2. Improving the quality and accessibility of information and education on women's health**
Women struggle to access trustworthy information about many aspects of women's health, such as treatment and support.
- 3. Ensuring the health and care system is responsive to women's health and care needs across the life course**
There are serious inequalities between women groups regarding availability of services, experience of services, and health outcomes.
- 4. Maximising women's health in the workplace**
Female-specific illnesses such as heavy menstrual bleeding, endometriosis, pregnancy-related issues and menopause can influence women's workforce participation, productivity, and outcomes.
- 5. Ensuring research, evidence, and data support improvements in women's health**
Women with disabilities, ethnic minorities, older women, women of child-bearing age, and LGBT+ have been underrepresented in research.
- 6. Dealing with the impacts of COVID-19 on women's health**
One of the COVID-19 impact example is that gender gap in childcare has grown over the pandemic, creating an additional difficulty for working mothers.

Distribution of FemTech Companies by Subsector

Share of FemTech Companies by Subsector, Q3 2022¹



Women's Wellness is the biggest subsector of the UK FemTech in 2022 that has significantly increased over the last few years. Some 3.5 million women in the UK left workforce in 2021. One in four women is dissatisfied with her own wellness.

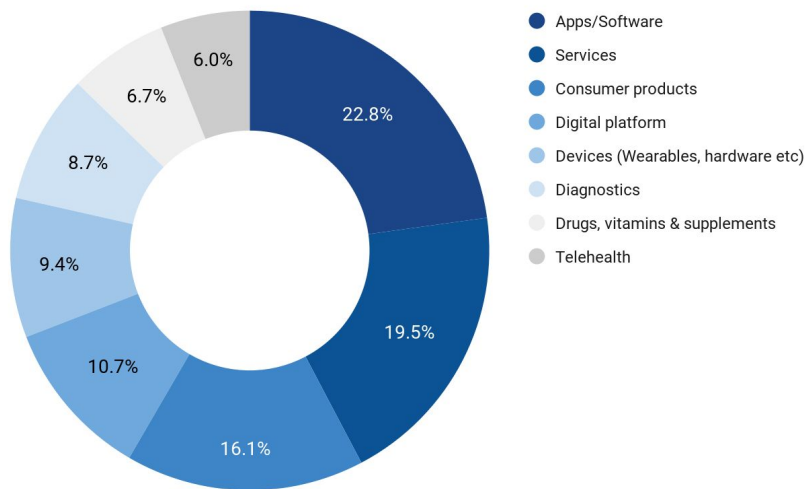
More than 15% of FemTech companies in the UK are addressing **Reproductive Health & Contraception**. With the evolution of society, women in the UK, as in other countries, tend to have children later and later in life, which raises associated risks and healthcare costs. Provisional data suggests that the number of births fell by 3.9% in 2020 and the first quarter of 2021, which puts the fertility rate at an all-time low.

Menopause Care is the third largest group of the FemTech market in the UK (15%), with the majority of companies being launched over the last 3 years. Official figures show there are 4,445,000 working women aged 50-64 in the UK². Hot flushes, memory loss, joint aches, and anxiety are just some of the menopause symptoms costing the UK economy 14 million working days every year³. The UK can be definitely called one of the leading countries in menopause science and technology.

There is great potential for development in the above mentioned categories, and even more in other subsectors of female health based on the high demand and limited amount of players.

Distribution of FemTech Companies by Product Type

Share of FemTech Companies by Product Type, Q3 2022



Apps/Software and Services comprise 42% of all FemTech companies by product type

Apps/Software and **Services** for women's health are the most common product types on the UK's FemTech market (42%). Most of them are solutions dedicated to Pregnancy and Nursing, Menopause Care, and General Healthcare.

Showing a considerable and growing innovation potential in general, the UK also extends the FemTech market developing innovative **Consumer products** for women. The majority of them are associated with menstrual health and solve issues arising during the menstrual cycle, relieve symptoms of the menopause, and promote the improvement of sexual health.

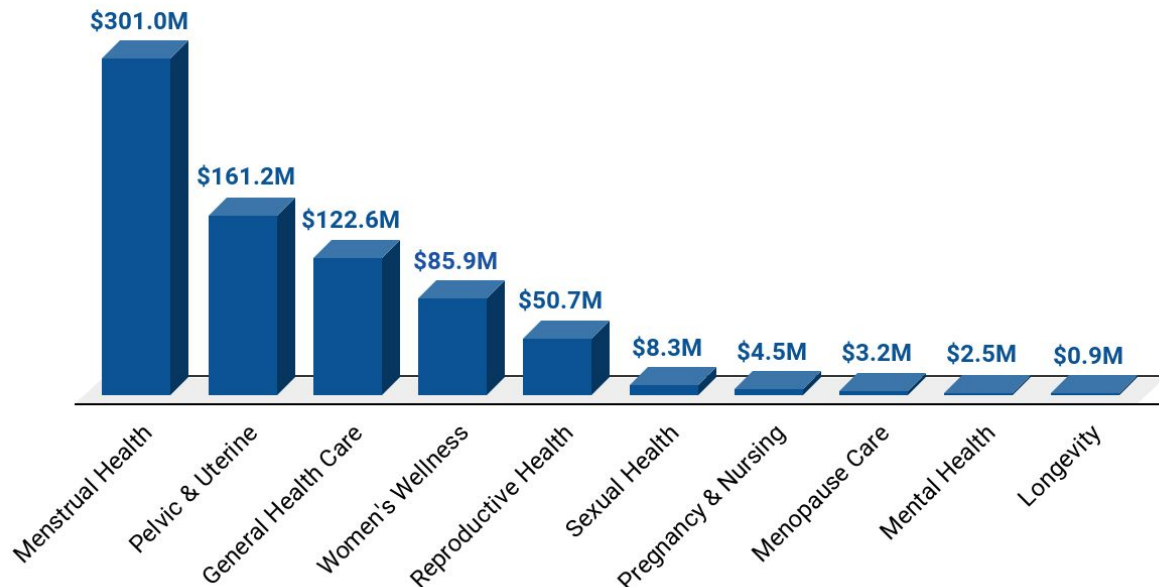
Digital platforms are represented by educational and community platforms with expert-led content and professional advice that address sexual health issues, pregnancy and parenting, fertility, pelvic organs healthcare, mental health, and others.

Some 10% of the **Diagnostics** companies develop innovations that are mostly associated with reproductive health and women's cancers. In general, the diagnostics solutions in the UK are developed for at-home usage and in the most convenient way.

In the UK, FemTech **Telehealth** appears a small category compared with other product types. It includes reproductive health-, pregnancy-, and menopause-related support for women from the experts and community members.

Total Funding Amount by Subsectors

Total Funding by Subsector, Q3 2022*



As of September 2022, the total funding to the FemTech sector in the UK was over \$740 million.

The Menstrual Health subsector leads the market by total funding standing at over \$300 million.

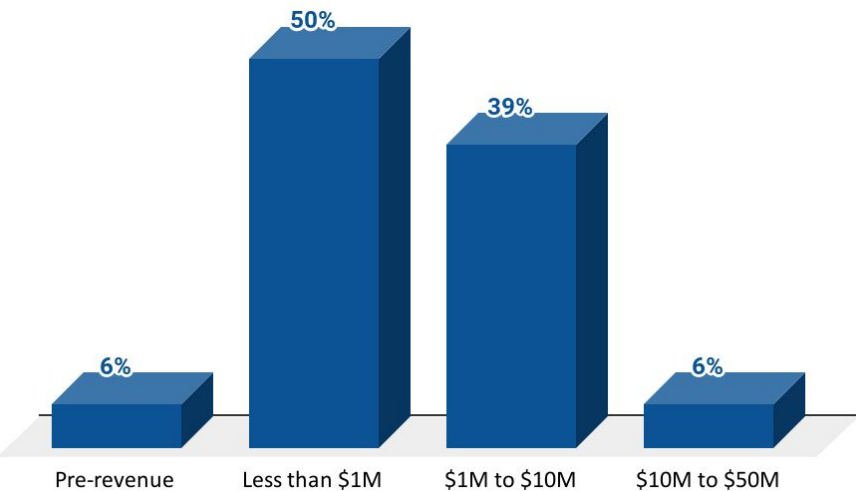
Two other largest subsectors by funding are Pelvic & Uterine Healthcare (\$161.2 million) and General Healthcare (\$122.6 million).

The top 10 most funded UK FemTech companies are:

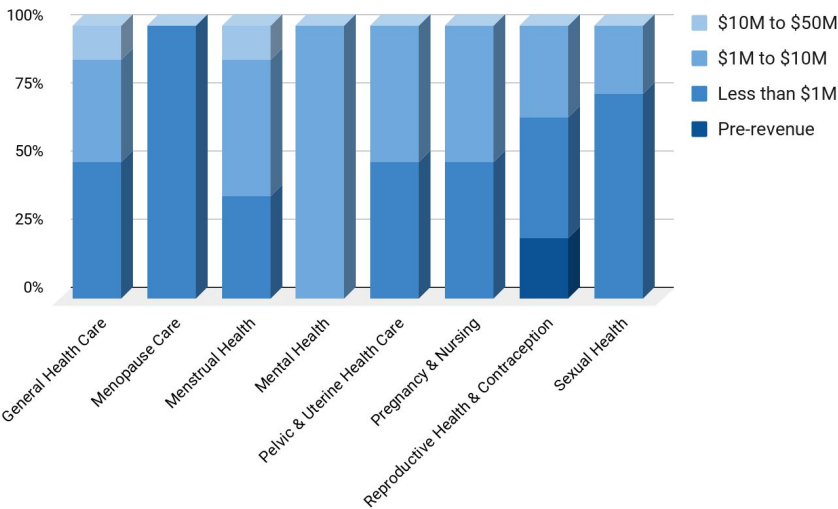
- Myovant Sciences
- Elvie
- Treatwell
- Flo Health
- Endomag
- Kheiron Medical Technologies
- Aptorum Group
- Micrima
- Peanut
- Callaly

Revenue Breakdown by Subsectors

Share of FemTech Companies by Estimated Revenue, Q3 2022



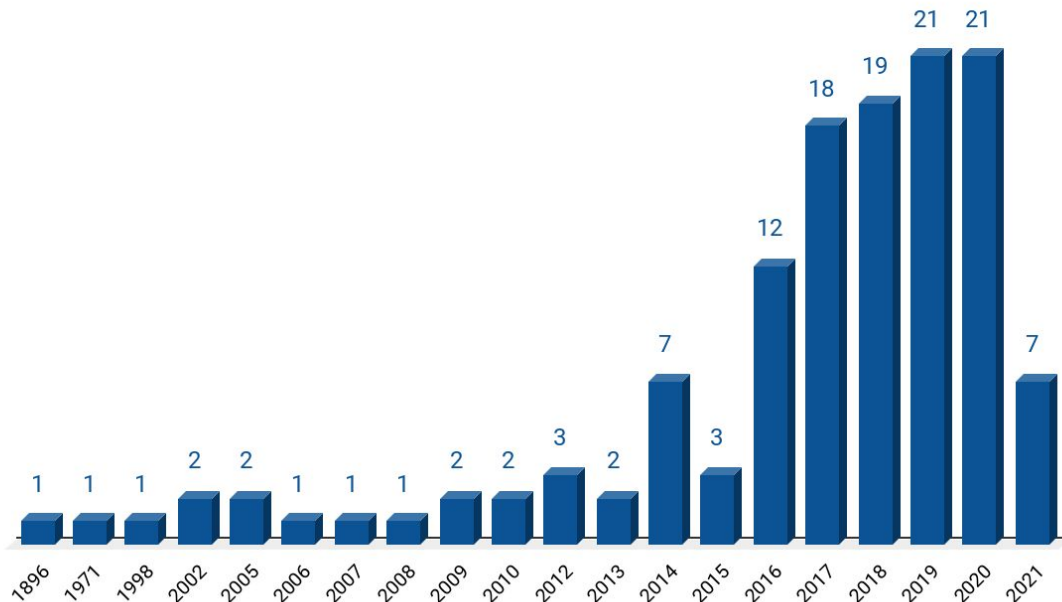
FemTech Subsectors by Estimated Revenue, Q3 2022



The FemTech Industry in the UK is a diverse and rapidly growing market that includes early-stage start-ups, middle-market companies, and publicly traded companies. However, **half of all UK FemTech companies generate less than \$1 million in annual revenue** each. There are examples in General Healthcare and Menstrual Health that have revenue from \$10 million to \$50 million.

Number Companies by Year of Founding (Cumulative)

Number of Companies by Year of Founding*



The FemTech sector is still very new. It expands rapidly and is still predominantly underfunded. According to projections, the FemTech sector will double in size in order to cover additional areas of women's healthcare and technology.

With social media and the changing world, more women are speaking about their experiences, so body issues and topics that were once considered taboo have become now a new norm in public discussions.

Investment Landscape

4%¹
of tech investment in
life science target
FemTech

\$14B
Total reported
funding by sector

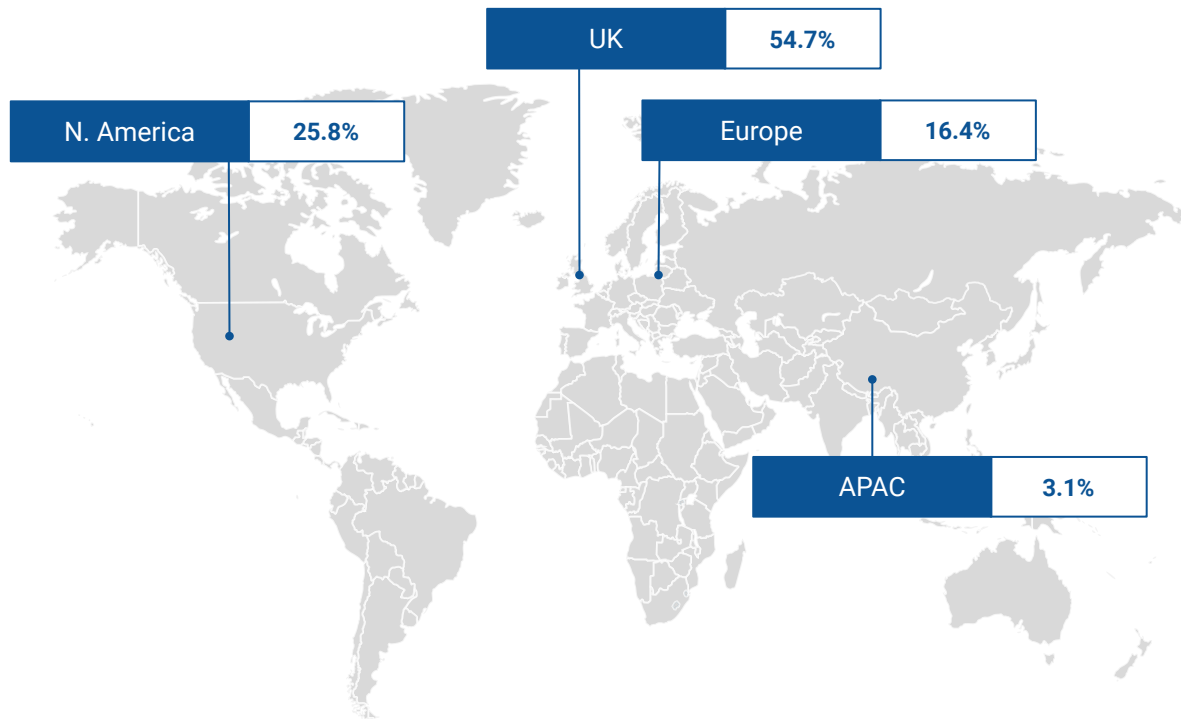
\$560M
Tech investment in
FemTech

\$740M+*
Total funding to the
FemTech in the UK

There is a growing interest in the FemTech companies in 2022. However, women's health still takes up a small percentage of all tech investments in life science. It only makes up 4% of global funding. More than half of all FemTech companies are seed-stage and have revenue of less than \$10 million.

FemTech Investors in the UK

Investors: Regional Proportion

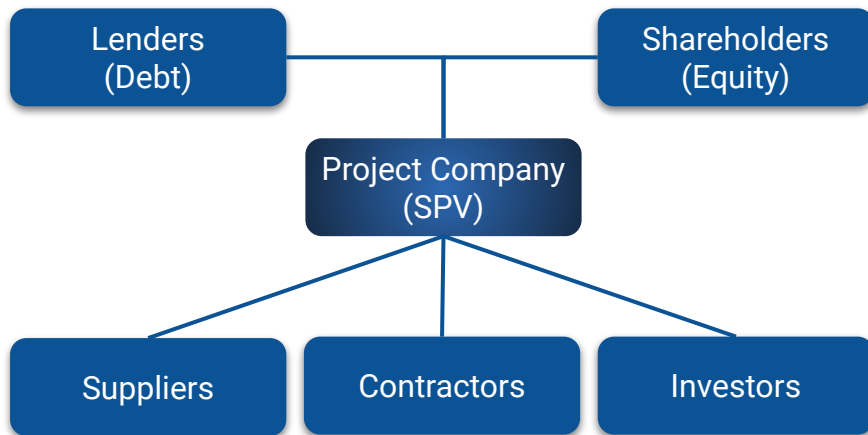


As with the most sectors of the UK economy, the FemTech sectors show the inherent prevalence of the UK investors' share in terms of investor representation. Currently, approximately 54.7% of investment into the UK FemTech companies comes from the UK-based investors.

Two other significant regions that house the investors are North America and Europe (excluding the UK) and hold second and third place, with 25.8% and 16.4% share of investors, respectively. In North America, the most prevalent country of origin of the investors is the USA while, in Europe, the majority of investors come from Germany and Spain.

The rest of the investment comes from the Asia and Pacific (APAC) region. The APAC region shows the 3.1% share of investors.

Investment Opportunities



In 2021, over \$1 billion of VC capital was invested into FemTech globally. However, investors who want to participate in the FemTech Industry face several barriers, which a special purpose vehicle (SPV) structure can solve. Relatively new and complex, FemTech is an industry that can be difficult to understand. Identifying investment targets backed by an established company makes it easier to evaluate and participate in the investment process.

An SPV could be utilised to reduce the credit risk for the stakeholders. The shareholding of the SPV remains separate from the shareholding of the parent company, and it remains undiluted throughout the SPV lifetime. The credit rating of the SPV remains to be favourable, and it encourages new investors to invest in such companies.

One of the most recent cases of SPV usage in the FemTech Industry is an SPV formed by Westerly Winds and Hiro Capital. It has come together to invest in Elvie, the revolutionary health and lifestyle brand, which develops iconic products for women, as part of the firm's \$97 million Series C funding round.

Top 5 Investment Deals in 2021-2022

1

elvie

Elvie, the global health and lifestyle brand developing iconic products for women, announced an extension of its Series C funding with a further **\$17.5 million** investment. This investment is an extension to the initial Series C funding announced in July 2021 and brings Elvie's total Series C funding to **\$97 million**.

2

vira

Vira Health, the company behind menopause app, Stella, has announced **\$12 million** in new funding to continue their mission of improving women's long-term health. The latest financing builds on a previous **\$2 million** funding round that drew investment from LocalGlobe, MMC, Amino Collective, among others.

3

 apricity

Apricity, a virtual fertility clinic, combines medical care with new technologies, applying AI to increase chances of conception. The start-up has raised **€6 million** in a Series A round from AXA's Kamet Ventures, bringing the total raised by the start-up to **€8.8 million**.

4



Hertility Health, the new women's health start-up revolutionising the world of hormone and reproductive health, announced the closing of a **£4.2 million**. The funds will help Hertility Health expand its current product offering of fertility and hormone testing, menopause, miscarriage, postnatal care, polycystic ovarian syndrome (PCOS), and endometriosis testing.

5

 the Lowdown.

The Lowdown is the UK's leading sexual and reproductive health platform, visited by 70,000 women every month. The Lowdown has closed a **\$2.5 million** seed round to supercharge its community-centred female health platform.

Key Trends and Innovations

Key Trends to Watch

MENSTRUAL HEALTH

The UK's FemTech companies in the Menstrual Health subsector mostly deal with the **sustainable, eco-friendly period products**, which are also comfortable to use in women's everyday life. There is also a trend to manufacture products which relieve pain (**painkillers**) **during periods**.

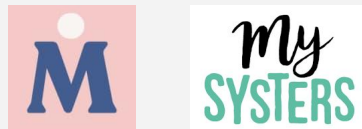
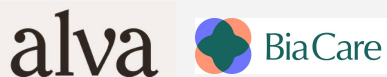
D A M E.



MENOPAUSE CARE

There is a clear trend in the UK to physically and mentally **support women through menopause**. Companies establish communities and virtual professional support where menopausal women can communicate with experts and share experiences with each other.

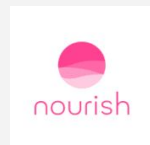
vira



PREGNANCY

The companies in the Pregnancy subsector aim to **support and educate pregnant women**. Therefore, they are represented in the form of **communities, online platforms** where future mothers can communicate with each other and purchase learning material.

BABY 2 BODY ♥



SEXUAL HEALTH

The sexual health is now in the focus of the large part of FemTech companies in the UK. They strive to manufacture **products delivering women's pleasure** in the convenient and secure way. **Eco-friendly products** are also popular in this subsector.

M Y S T E R Y V I B E



Key Trends to Watch

MENOPAUSE CARE

Some 2 years ago, the **FemTech community** brought great attention to how underserved **the menopause market** was in the **UK**, and now we are seeing great leaps forwards for solutions and services for **menopausal women**. The most common treatment is HRT; however further solutions have been offered to treat symptoms of menopause such as hot flashes, vaginal dryness, sleeplessness, weight gain, etc. Further research is being conducted to see if there is a connection between how women experience menstruation and **menopause**.

MPowder

GRACE

alva

Become

SEXUAL HEALTH

Sexual health saw a boom in the past year as many people in the UK were in lockdown and became interested in exploring a deeper education of their bodies and sexual preferences. **SexTech** became more accessible than ever, and along with it, an education of sexual health. AI, partnered long-distance devices, and gender nonconforming SexTech will continue to drive **sexual health** forwards and encourage women to find empowerment and a sense of identity through exploring their bodies.

ILOH



FERLY

BRIGHT
CURE
Pee Happy

FERTILITY

Fertility solutions have been trending in **FemTech** as older women are ready to embark on starting a family in the **UK**. In the previous couple of years, there were concerns about how the pandemic and vaccine would affect children and pregnancy, but now that more solutions are available, women are looking to **FemTech for fertility solutions**. As **fertility** can be a difficult journey, women are recognising the importance of finding a community in **FemTech**, while finding the right solution for maximising their chances of conceiving.



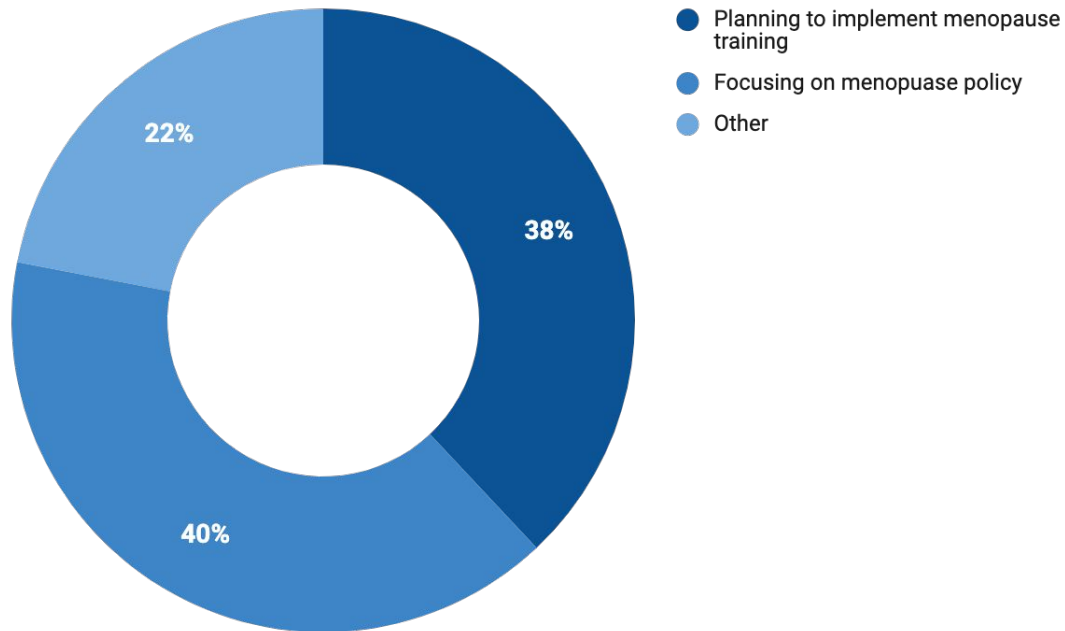
béa
fertility



Aura

Key Trends to Watch: Menopause

Menopause is becoming a key topic for UK employers



Menopause is one of the hot areas in FemTech, and with good reason: By **2025**, there will be over **1 billion women experiencing menopause** in the world.

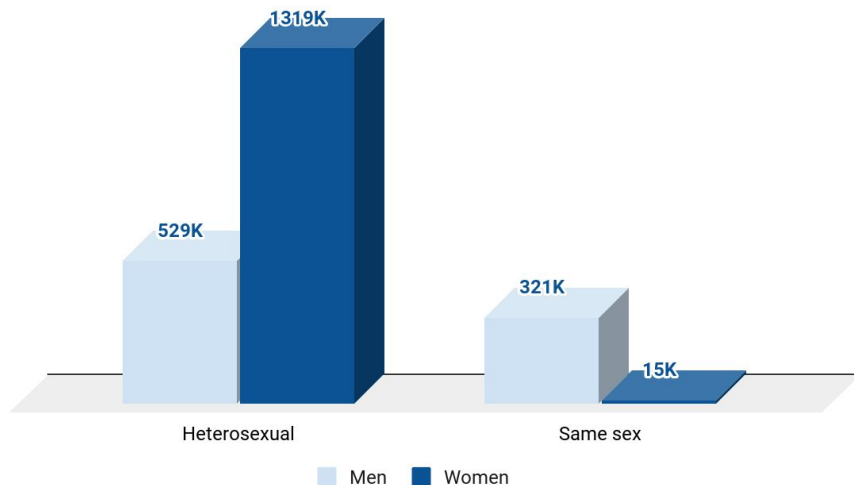
British corporate brands are developing policies to support employees going through menopause. These policies also aim to educate their entire workforce on issues surrounding menopause.

UK employers see women's health as a key priority in their health and well-being strategies, with nearly three quarters of employers reporting women's health as a concern.

Employers view menopause training and policies as their biggest aim for health benefits next year.

Key Trends to Watch: Sexual Health

Specialist sexual health services' attendance in England.
Women are more likely to care about sexual health.



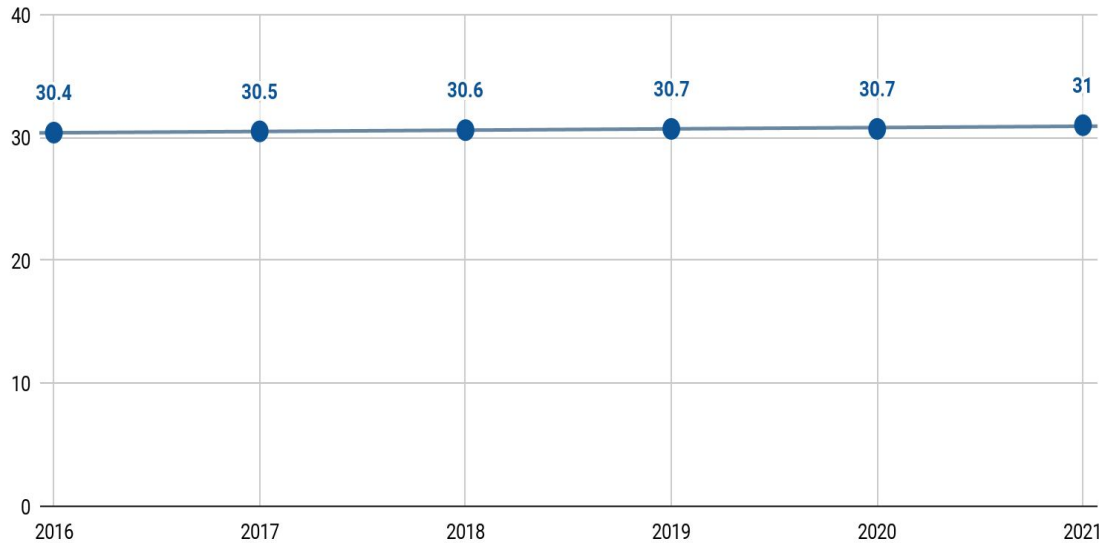
ILOH is the UK's first by-women, for-women sexual health and well-being retailer. The company is empowering all women to take ownership of being a woman and take control of sexual wellness.

Healthy Pleasure Group is the only global outfit dedicated to the **Sexual Health and Technology industry**. Their ecosystem is powered by five businesses that meet every need to propel investment, education, and innovation in Sexual Health and Technology: Healthy Pleasure Agency, Healthy Pleasure Lab, Amboy Street Ventures, and Healthy Pleasure Demand. The company was founded in the United Kingdom.

Ferly is an audio content app that encourages LGBTQ community to discover what exactly sex means to them – how they feel about it and how they have it. Its mission is to empower every person to lead a life that is pleasurable, confident, and healthy.

Key FemTech Trends in the UK: Fertility

Average age of mothers at childbirth in the UK



The UK fertility market is worth around \$370 million annually and has enjoyed steady growth over recent years. The current trend among women is to become pregnant at a later age, owing to an increased focus on careers and late marriage.

Many factors, such as older women's age and environmental factors, contribute to the increasing number of women experiencing health issues before, during, or after pregnancy; therefore, **the demand for FemTech solutions for reproductive health is expected to grow.**

Innovations

Elvie Stride



The noiseless, wearable electric breast pump created to discreetly slip inside woman's bra. That way, women can easily collect breast milk where other motherpumpers dare not go. Coordinated through a smartphone, Elvie Stride is wire-free, hands-free, and hassle-free.

The Fertility Predictor



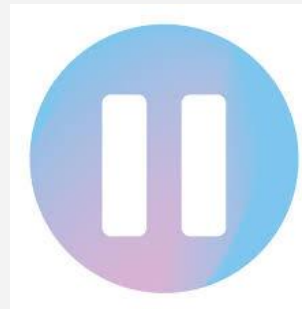
The Natural Fertility Predictor works by determining a perfect fertility potential and illustrating how lifestyle can influence this ideal potential. It's a way to define the likelihood of getting pregnant at the user's age if she has no fertility complications and leads a healthy lifestyle.

Renude Skincare



Renude connects skincare science and data science to provide customers with easier and more effective ways to find skincare products that satisfy them. The London-based company offers a skincare membership, connecting customers with personal licensed professionals.

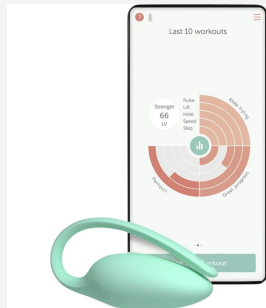
coolZen



coolZEN is an innovative medical device for women in menopause complaining about hot flashes, which functions by reacting to the onset of a hot flash episode and boosts a natural human physiological response to bring relaxation, and repeats this procedure every time when needed.

Innovations

Elvie Trainer



Elvie Trainer helps women of all ages to gain greater bladder control. Designed to prevent pelvic floor problems, it helps to fight incontinence and pain during sex. It is one small device to break the global taboos and strengthen the muscles of the pelvis.

Pelviva



Pelviva is a Pelvic Floor trainer that sends neuromuscular electrical stimulation to women's pelvic floor muscles. It is the first of its kind to provide one combined treatment for both stress and urinary continence. It offers women a effective, safe, and discrete treatment for bladder leakage.

Kheiron Medical Technologies



Kheiron's mission is to help breast cancer patients live longer, better lives through earlier detection. They combine new Kheiron's Deep Learning technology, data science, and radiology insights to help doctors find malignancies in mammograms.

OvuSense

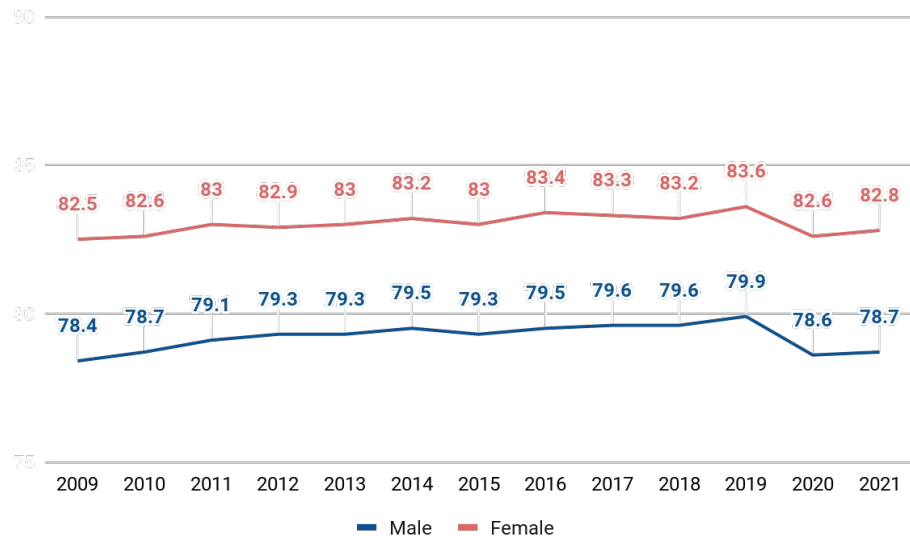


OvuSense is the only fertility and ovulation monitor available that predicts the ovulation in real time using current cycle data and confirms a woman's ovulation with 99% accuracy. The sensor uses patented Ovucore core body temperature technology.

FemTech and Longevity

FemTech Longevity in the UK

Life Expectancy at Birth in the UK, by Gender



Given the low number of FemTech companies focused on a core Longevity component in the UK, the sector is not developed well. Due to an increasing interest of the government in solving particularly women's health issues, the women's life expectancy will be also taken into consideration. Thus, the sector is going to expand, and we predict a rise in the number of FemTech companies focused on Longevity in the UK.

The UK FemTech companies focused on Longevity develop innovative products that combine science, technology, and design to treat and prevent long-term health conditions. In the focus are such areas of women's health as menopause, dementia, palliative care, etc. The FemTech companies strive to empower women with the digital tools they need to take control of their health.

Longevity Trends in the UK

Being an essential part of the FemTech Industry, FemTech Longevity focuses on technologies, services, and research related to extending women's healthy lifespan. FemTech Longevity companies are engaged in research, treatment, and diagnosis of age-related diseases and research in the field of regenerative medicine. Menopause Care and Mental Health solutions are also contributing significantly to improving women's Longevity.

By focusing exclusively on female health, this tech sector will inevitably acquire special significance for areas inextricably linked to the aging process (e.g. effects of menopause and lifestyle biomarkers). Hence, FemTech has formed a synergetic connection with the Longevity Industry. The FemTech Longevity sector was popularised after creating the Centre for Female Reproductive Longevity and Equality at the Buck Institute for Research on Aging – a centre for FemTech in all but name.

In 2015-2021, women's life expectancy averaged 83.1 years globally.

Globally, women on average live longer than men.

Men's life expectancy is almost 7% (or about 8 years) less than women's.

The difference in life expectancy between women and men may seem to be explained only by biological reasons. However, women face a lot more difficulties on their way to Longevity. The high mortality rate among mothers is reason enough for men to be seriously concerned. Women's health is also strongly affected by social background (employment, income level, family responsibilities) and environmental conditions.

Longevity in FemTech

LONGEVITY

Longevity represents an emerging field focused on healthy aging, including technologies and software to improve women's healthspan and lifespan.

The Longevity Industry presents solutions for the detection, monitoring, and treatment of chronic diseases, along with biometrics and lifestyle solutions.

Evanna develops fast-track diagnostic tools and treatment for those vulnerable to CIDs and aIDs. The focus is on precision healthcare technologies for chronic inflammatory bowel, brain, and skin diseases.

Virtue Health is a digital therapeutics company developing new approaches to treat and prevent age-related diseases.

MENTAL HEALTH

In general, women do not experience more emotional disorders than men. At the same time, they are more susceptible to anxiety and depression. FemTech contributes to the intersectional lens and can help deepen understanding of identity, lived experience, and mental health, as well as improve mental health for minority women.

According to the World Health Organization, about 10% of pregnant women and about 13% of postpartum women experience mental health problems and depression.

Unfortunately, few women today are aware of companies that can help them deal with mental health challenges. Moody Month and Clementine App are only two examples from the long list of such companies.

MENOPAUSE SOLUTIONS

It is a well-known fact that menopause can cause an increase in the accumulation of abdominal adipose tissue. Aging can also trigger weight gain, increasing the risk of developing serious diseases such as cancer, hypertension, Type 2 diabetes, stroke, and osteoarthritis.

In the past two decades, evidence of the benefits of calorie restriction for Longevity in women has begun to emerge. It has been found that calorie restriction without malnutrition can improve the situation with markers of aging and age-associated diseases such as Type 2 diabetes, cardiovascular diseases, cancers, and neurological disorders. A great example of menopause care is mySysters. mySysters is a social and self-care mobile app to help women manage perimenopause and menopause.

FemTech Personalities in the UK

FemTech Personalities in the UK

General Healthcare



Amy Thomson
Founder of Moody



Peter Kecskemethy
Co-Founder and CEO of
Kheiron Medical



Hadeel Ayoub
Founder and CTO of
BrightSign



Karolina Löfqvist
Founder and CEO of
Hormona



Elin Haf Davies
Founder and CEO of
Aparito



Elena Rueda Carrasco
Co-Founder and CEO of
Dama Health



Mari Thomas
Founder of MAAREE



Eva Galant
Founder and CEO of
Hashiona



**Farah Dehmouni
Jashanmal**
Founder of IAMENO



Lydia Yarlott
Co-Founder of
Pando Health



Dr Fatima Ahmed
Clinical Lead at
ORCHA



Mary Kerr
Biotech CEO of NeRRe
Therapeutics



Jenny Thomas
Programme Director of
DigitalHealth



Dr Stephanie Kuku
Advisor at Hardian
Health

FemTech Personalities in the UK

Menstrual Health



Dmitry Gurski
Co-Founder and CEO of Flo Health



Tracy Wogman
Founder and CEO of Create Better Days



Alexis Abayomi
Founder of UCycleSync



Lucy Lettice
Co-Founder of &SISTERS



Ann Roberts
Chief People Officer at Flo Health Inc.



Laura Robson
Facilitator at The Body Literacy



Claire Lettice
Co-Founder of &SISTERS



Max Scrobov
Co-Founder and CPO of Flo Health

Menopause Care



Helen Normoyle
Co-Founder of My Menopause Centre



Dee Murray
Founder and CEO of Menopause Experts Group



Louise Newson
Founder of Newson Health Menopause & Wellbeing Centre



Val McDonald
Founder of Happee Un Ltd



Gaele Lalahy
COO of balance-app

FemTech Personalities in the UK

Business Support Services



Bérénice Magistretti
FemTech investor



Rhiannon Jones
Founder of Ultra Violet
Agency



Rebekah Louise
Freelance Health
Writer



Petra Rabely
Product Designer at
VMLY&R



Hannah Wrathall
Founder of Wrapp
Consulting



Kim Palmer
Co-Founder of
Clementine App



Sara Campin
Founder and CEO of The
Nourish App



Anna Butterworth
Founder of Ultra Violet
Agency



Amanda Hargreaves
HealthTech Manager



Irina Groysman
Business Consulting
Manager at ZS



Peta Bush
Consultant of
Healthwear



Louise Stevenson
Founder of WorryTree and
WorkHere



Nuala Murphy
Founder and CEO of
Moment Health

Mental Health

FemTech Personalities in the UK

Hubs & Communities



Marija Butkovic
Founder and CEO of
Women of Wearables



Katia Lang
Co-Founder of
FemTech Lab



Emily Otterbeck
Co-Founder of
Cambridge FemTech
Society



Jessica Platt
Associate Insights
Researcher at
Cambridge Design
Partnership



Arianna Radji Lee
Founder of Pachamama



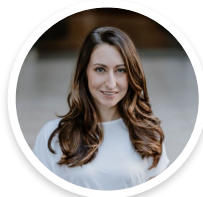
Wendy Powell
Founder and CEO of
MUTU System



Christiane Gross
Business Development
Lead at LactApp



Karina Vazirova
Co-Founder of FemTech
Lab



Kathrin Folkendt
Founder & CEO
Femtech Insider



Kate Afanasyeva
Business Mentor at
FemTech Lab



**Lesley Farrah
Dowling-Carter**
Co-Founder of Cambridge
FemTech Society



Michelle Kennedy
Founder and CEO of
Peanut



Tushar Srivastava
Founder and CEO of
Nurturey

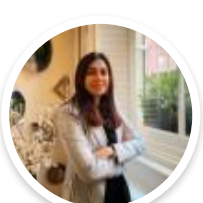
Pregnancy & Nursing

FemTech Personalities in the UK

Investors / Accelerators



Triin Linamagi
Co-Founder of Sie Ventures



Deepali Nangia
Co-Founder of Alma Angels



Victoria Kennard
Advisor at FemTech Lab



Pamela Walker
Partner at Gate One



Billie Quinlan
Co-Founder and CEO of Ferly



Dr Anna Hushlak
Co-Founder and CSO of Ferly



Francine Sharrocks
Founder of findmysexpert



Fiona Pathiraja
Managing Partner at Crista Galli Ventures



Sarah Drinkwater
Angel investor



Taryn Barker
Commercial Solutions Director at Women's Health and FemTech



Fabienne Cauli
Chief Commercial Officer of AXA



Farah Kabir
Co-Founder of HANX



Stephanie Alys
Co-Founder of MysteryVibe



Virginia Sofia Cerrone
Co-Founder and CMO of pureeros

Sexual Health

FemTech Personalities in the UK

Reproductive Health & Contraception



Abi Hannah
Co-Founder and CEO of
Fertility Circle



Dr Belinda Coker
Executive Medical
Director and Medical
Doctor



Nicole Leeds
Head of Marketing
Strategy at Clue



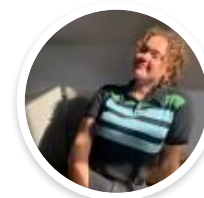
Leighton Turner
Co-Founder and CTO of
Juno Bio



Lala Ireland
Founder of Feminine
Vitae



Karen Hanson
Co-Founder and CCO of
Fertility Circle



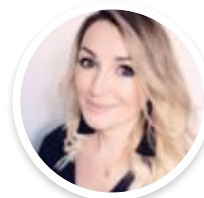
Laura Pennycook
Team Leader at CERT



Jo Living
Co-founder and COO of
Fertility Circle



Ghislaine Colella
Chief Growth Officer at
Apricity



Catherine Hendy
Co-Founder of ELANZA
Wellness



Lina Chan
Co-Founder of Parla



Hana Janebdar
Co-Founder and CEO of
JunoBio



Julie Morgan
Founder of All About
Infertility



Nelli Morgulchiki
Strategy Associate at Hertility
Health

FemTech Personalities in the UK

Women's Wellness



Tania Boler
Founder and CEO
of Elvie



Thang Vo-Ta
CEO and Co-Founder of
Callaly



Aoife Nally
CMO of Elvie



Daniella Peri
Founder and CEO of
Yoppie



Nadiya Siddique
Founder of Stealthy
Woman



Ruth Handcock
CEO of Octopus
Investments



Wan Tseng
Founder of Wisp



Gabby Edlin
CEO and Founder of
Bloody Good Period



Ruby Raut
CEO and Co-Founder of
Wuka Wear



Olivia Ahn
Founder of Planera



Afsaneh Parvizi-Wayne
Founder of Freda



Andrea Zitna
Founder of Stealthy
Woman



Bella Trang Ngo
CEO and Co-Founder of
Brarista



Hannah Samanoi
Founder at Unfabled

Interviews With FemTech Leaders

TOTM



Aura

hormona

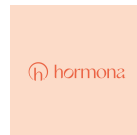
LactApp

femtech
north

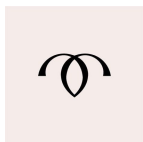
Report Contributors



FemTech North is covering topics and issues that impact women and determine what - and how - entrepreneurs, innovators and researchers of every gender are using tech to help women live their lives the way they want to.



Hormona is a science-backed, personalised solution helping women to finally manage their hormones on their own terms. The combined expert knowledge and research behind Hormona ensures that women's hormonal health is in safe hands.



Hertility Health is a women's health start-up shaping the future of reproductive healthcare by pioneering unique diagnostic testing that provides data-driven and advanced insights into reproductive health, fertility decline, and the onset of menopause.



LactApp is the leading mobile app giving personalised, evidence-based expert support to mothers on infant feeding and maternity. LactApp leverages its 13M+ real-world consultations to create proprietary AI that will reduce costs in the healthcare system.



Aura Fertility partners with fertility clinics to deliver pioneering whole-person care for every IVF cycle. Its patient-facing app and clinical dashboard provide a personalised 24/7 wraparound support companion for the IVF journey, improving psychosocial health, patient experience, and fertility outcomes.



TOTM delivers planet-friendly period care, with a vision of inspiring better, more sustainable ways to manage periods. Its task is to drive powerful period change by busting taboos, supporting period dignity, and championing menstrual well-being.

Report Contributors



Claire Robinson

Claire is Founder at FemTech North. She helps companies connect with organizations to innovate. Currently working at the National Innovation Centre for Ageing she is passionate about all innovation that can help us. This is one of the key drivers behind setting up Femtech North.



Terri Harris

Terri Harris is Education and Communication Manager at Bloody Good Period. She is a menstrual, sexual health, and reproductive health specialist with international experience developing a portfolio of educational and capacity-building programmes.



Dr Helen O'Neill

Dr Helen O'Neill is Founder and CEO of Hertility Health, a UK women's health start-up shaping the future of reproductive health by enabling women to understand and manage their fertility and hormonal health from menstruation to menopause.



Christiane Gross

Christiane Gross is International Business Development Lead at LactApp. She is engaged in increasing the reach of technology to support human lactation.



Abi Hannah

Abi is Co-Founder and CEO of Aura Fertility. Aura partners with fertility clinics to deliver pioneering care for the IVF cycle. Motivated by her own experience of trying for a baby, she wondered why there was so little to support people in this emotional quest, and so the idea for Aura was born.



Sally Tuhami

Sally Tuhami is COO / CFO at TOTM Limited. She is a dedicated FCA with over 19 years of experience working in leadership roles, with a wealth of experience in scaling companies.



Jasmine Tagesson

Jasmine Tagesson is COO and Co-Founder of Hormona. Her aim is to truly make a difference to women's lives by using data and innovative solutions to reshape the future of women's health, contributing advances that lead to better health for all women.



1

What is unique about FemTech in the UK?



What is unique about FemTech in the UK?



Dr Helen O'Neill

Founder and CEO of Hertility Health

'Women's health has long been underserved by healthcare systems worldwide, and the UK is no exception. Even worse, the UK has the largest gender health gap among G20 countries. FemTech start-ups are putting women's health on the map. They are helping to uncover gaps in care – from pain dismissal in the primary care setting to the disparity in medical treatment compared to men for different conditions such as dementia. What differentiates UK FemTech start-ups from their counterparts in other geographies is how closely they work with policymakers while also growing their businesses in the private sector to pave the way for changes in how women are cared for in the public sector. The great news is that the UK government welcomes assistance and guidance from women's health leaders and experts.'



Claire Robinson

Founder at FemTech North

'I am not so sure there is anything 'Unique' about FemTech in the UK, however I do think we are at the crest of a perfect wave. Women in the UK are now aware of various gender gaps that have distorted our health provision and outlooks, they are wanting to be better informed and to support their family friends and colleagues.'



Christiane Gross

International Business Dev Lead at LactApp

'There is a great local network of FemTech enthusiasts in London, maybe the third biggest worldwide after US hubs like New York and San Francisco. The unique thing is that the gender health gap is bigger than everybody who lives here thinks – there really is a lot of potential for improvement and for catching up even in comparison with other developed nations. Many topics of women's health are a big taboo in the UK, even more than in other developed countries.'

What is unique about FemTech in the UK?



Abi Hannah

CEO & Co-Founder of Aura Fertility

'There's opportunity for FemTech innovation across sectors including personal healthcare, private healthcare, and the NHS. This means that new solutions can be tested by consumers and early adopters in different environments and across more diverse communities.'



Jasmine Tagesson

COO & Co-Founder of Hormona

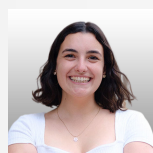
'I think the FemTech scene is booming in the UK and we feel super-excited to be part of it. I think what is unique about FemTech in the UK is that there are actually quite a few of us and there is a rise in support for women in FemTech with initiatives such as FemTech Lab and WoW.'



Sally Tuhami

COO / CFO at TOTM Limited

'FemTech in the UK is a rapidly evolving space with emerging brands and start-ups exploding on the scene with fresh ideas and innovations. With VC funding recognising the potential of FemTech, we are seeing the building of an industry which is, and will continue to, change women's lives for the better.'



Terri Harris

Education & Communication Manager at Bloody Good Period

'We're at an amazing point for FemTech in the UK right now. Women's Health is finally getting the recognition it deserves as the UK Government launches its Women's Health Strategy, and the pandemic has also pushed British society to think about innovation in healthcare. FemTech is right at the centre of these two major trends!'



2

What FemTech innovations are going to be crucial for the UK in the coming years?

What FemTech innovations are going to be crucial for the UK in the coming years?



Sally Tuhami

COO / CFO of TOTM Limited

'FemTech innovation is needed for people who have periods worldwide, not just in the UK. Digital services are now far more commonplace than ever before and can serve as a real platform for moving to more commonplace use of digital services that offer on-demand health-focused support, from mental health to the menopause.'



Claire Robinson

Founder at FemTech North

'In the short term menopause, periods, contraception and fertility life enhancing products - there seems to be an app for everything but a migraine app literally changed my life in the long term pelvic floors, wearables and better ways of monitoring/diagnosing health issues. Also getting rid of shadow banning to inform women and men of issues correctly and those that discuss sexuality/freedoms/pleasure. This is crucial I feel to the growth of the Femtech sector.'



Abi Hannah

CEO & Co-Founder of Aura Fertility

'It's important that FemTech innovation offers support across the board to provide both consumers and the healthcare industry with access to new and improved innovations in FemTech. We also have a huge need for innovation in areas that were previously more taboo, such as sexual wellness, testing, pelvic floor, and menopause.'



Christiane Gross

International Business Dev Lead at LactApp

'The opportunity is huge, because the gap in solutions for the patient is huge. I see innovations thriving in all aspects of women's health. Currently the moment has arrived for menopause care technology to go viral and mainstream and other technology and solutions will follow soon.'

What FemTech innovations are going to be crucial for the UK in the coming years?



Jasmine Tagesson

COO & Co-Founder of Hormona

'I think there will be many FemTech innovations in the coming years that will be crucial, especially seeing as there are so many health issues that are exclusive to, or more prominent in women. There is still a lot more to do in this sector. Data is desperately needed to improve women's health and the more attention, funding, and focus this sector gets the quicker we can close the data gap in women's health and improve health outcomes for all women.'



Dr Helen O'Neill

Founder & CEO of Hertility Health

'The most crucial FemTech innovations in the coming years will be those that allow women to feel more in control of their health and answer their questions, through personalised medicine and tracking. This is why monitoring reproductive health through minimally invasive accessible diagnostic tools and digital solutions will be the key to helping women understand the black box that is currently their reproductive health.'



Terri Harris

Education & Communication Manager at Bloody Good Period

'It's really exciting to see the sector growing, redefining what women's health means, and finally expanding well beyond reproductive health. I'm excited to see the breadth of issues FemTech can reach into in women's lives over the next few years. I'm also excited to see how DeepTech can be better integrated into FemTech solutions. Companies such as Micrima and DEOS are really paving the way in this respect.'

The background features a light blue and white color scheme with geometric hexagonal patterns. A large, solid blue hexagon with a white center containing the number '3' is positioned in the upper right. Below it, a series of concentric, thin blue hexagonal outlines are visible. In the lower right, there are overlapping light grey and light blue hexagonal shapes.

3

How can FemTech be better integrated with the NHS?

How can FemTech be better integrated with the NHS?



Jasmine Tagesson

COO & Co-Founder of Hormona

'I think the ideal way for FemTech and FemTech solutions to be better integrated with the NHS would be for the NHS to get involved with the companies and solutions much earlier. Through partnerships or even accelerator schemes and the like, with the NHS as a key figure, the NHS will learn about possible solutions early on and can also help guide the start-up on how to build their solution in way so that it is easily integrated with the NHS.'



Sally Tuhami

COO / CFO of TOTM Limited

'Due to the overwhelming demand for these services, there's an opportunity to integrate FemTech solutions to support women throughout the UK. Screening services and testing for example could be offered as a solution to speed up diagnosis of minor and common illnesses.'



Dr Helen O'Neill

Founder & CEO of Hertility Health

'Sadly, we have heard many stories at Hertility about how the NHS has not provided adequate support for our customers. Using additional training to ensure that NHS clinicians understand the importance of women's reproductive health and how its effects go beyond fertility can be the first step to helping the NHS improve healthcare for women.'



Claire Robinson

Founder of FemTech North

'Funding and campaigns led by government and associations are needed, but funding is key, as is reducing barriers to get products in to the NHS when they are needed. So perhaps more collaboration workshops between NHS buyers/users and patients would be useful.'

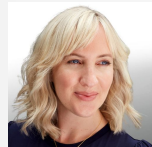
How can FemTech be better integrated with the NHS?



Christiane Gross

International Business Dev Lead at LactApp

'Through a willingness of NHS key decision-makers to really commit to the NHS long-term plan and put a budget where their intentions are. A specific budget for pilots with FemTech solutions would be a great start. FemTech companies are very confident about the extent to which they can improve health outcomes; the problem is they need to get a chance to be tested in an NHS environment first, to prove its impact. Many FemTech founders lack networks with key decision-makers, and even just having an app included in the NHS app library is an opaque and maze-like process with no clear criteria to follow.'



Abi Hannah

CEO & Co-Founder of Aura Fertility

'Early adopter sites and clinical champions are required for better integration with the NHS. These early adopter sites can then be test beds for innovation and data can be collected to determine outcomes and return on investment. This allows for a clear case to be built for wider adoption in the NHS.'



Terri Harris

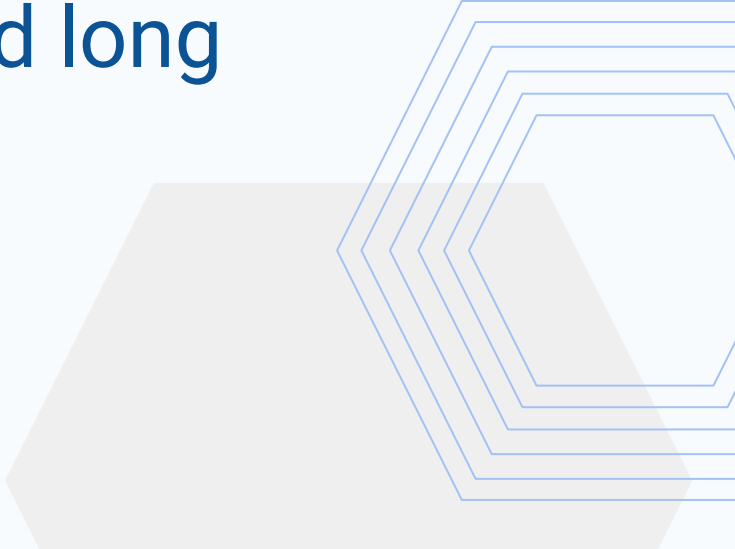
Education & Communication Manager at
Bloody Good Period

*'1. Understand the NHS's priorities and operation strategy when adopting innovation. The Academic Health Science Network is a great starting point for founders.
2. Get healthcare professionals on board; they will be invaluable to helping you navigate NHS structures.
3. You really need a compelling and evidence-based business case. Providing a clear narrative that can demonstrate what benefit your company has for patients, staff, and the healthcare system will be absolutely key!'*



4

How will FemTech innovations affect
British women in the short and long
term?



How will FemTech innovations affect British women in the short and long term?



Sally Tuhami

COO / CFO of TOTM Limited

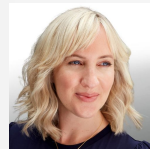
'FemTech innovations give British women an opportunity to access better solutions that will have a positive impact on their day-to-day lives. In the short term, this means access to products and services designed for them; in the long term, as these innovations mature and are widely adopted, women can have more control over what they're using and how they're accessing information, and they can have more knowledge to make ever-more informed decisions.'



Claire Robinson

Founder at FemTech North

'Generally through better awareness, but also through inclusion at work and the removal of barriers. They will lead, in the long term, to the removal of taboos and stigma against anything different and, in the very long term, to better health and longer, more fulfilling lives.'



Abi Hannah

CEO & Co-founder at Aura Fertility

'Short term: Women will have access to a myriad of previously unavailable solutions which will not only solve problems but be delivered in a way that is more accessible for women (e.g., via TeleHealth or virtually).

Long term: The availability and accessibility of large data sets relating to FemTech will drive more systemic change and enable researchers, academics, clinicians, and FemTech innovators to work together to deliver change.'

How will FemTech innovations affect British women in the short and long term?



Christiane Gross

International Business Dev Lead at LactApp

'In the short term I have already seen lives improved through menopause solutions, for example, and many more women will be helped. In the long term women's health will be improved if key decision-makers at top levels wake up to its potential.'



Jasmine Tagesson

COO & Co-Founder at Hormona

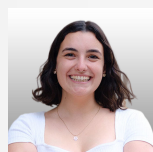
'I believe FemTech innovations will have a massive impact on not just British women, but all women. I think the sheer fact that these issues or conditions that FemTech is addressing are finally being recognised will empower women to demand appropriate help and treatment. FemTech innovations will save millions of women the pain and suffering they currently experience and will have a huge impact on the well-being and quality of life of 50% of the world's population.'



Dr Helen O'Neill

Founder & CEO of Hertility Health

'While changing people's behaviour and attitudes to health is challenging in the short term, FemTech innovations can give proactive people an opportunity to get the answers they seek. These products can empower women to understand their bodies better and make more informed decisions regarding their health.'



Terri Harris

Education & Communication Manager at Bloody Good Period

'In the short term, FemTech innovations will increase women's knowledge of their bodies across their lifecycle, reduce the gender data gap in the medical sciences and biosciences, and provide comfort and community for women with female-specific conditions. In the long term, innovations will improve and equalise health access, create new solutions for long-term chronic conditions, and reduce the shame and stigma associated with certain conditions.'



5

What can UK FemTech do to better serve the global ecosystem?

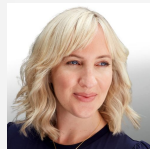
What can UK FemTech do to better serve the global ecosystem?



Terri Harris

Education & Communication Manager at Bloody Good Period

'Give back to emerging markets wherever possible! Whether through mentorship, better access, or even funding, offering FemTech start-ups in emerging markets the opportunity to improve women's health is really key. FemTech is a global revolution! Emerging markets and developing countries are the worst hit by women's health issues and have higher rates of mortality. FemTech could be a really great way to equalise the global divide. However, we need to ensure that start-ups within those emerging markets, who know their consumers and the culture best, are able to build the solutions to fit. Only then will we truly have a FemTech ecosystem.'



Abi Hannah

CEO & Co-Founder of Aura Fertility

'Partner more effectively. There are lots of companies and innovators doing great things across the globe and opportunities for partnership and collaboration that can allow UK FemTech solutions to scale more quickly. Collaboration over competition is key!'



Sally Tuhami

COO / CFO of TOTM Limited

'To better serve the global ecosystem, adaptability is crucial to ensure innovative products and services are sensitive to the needs of different markets and cultures. It's also important for affordability to be part of the FemTech evolution, otherwise this industry will fail to address the broader need of consumers on a global scale.'

What can UK FemTech do to better serve the global ecosystem?



Christiane Gross

International Business Dev Lead at LactApp

'Recognise that the UK FemTech ecosystem could learn from solutions and innovations in other countries (and not only from the US) as they can sometimes be ahead of what has been created nationally.'



Claire Robinson

Founder at FemTech North

'Join it! Step up and participate and share knowledge in an easy to understand format. We want better trials that include women then we need women to be encouraged to step up to participate. Women are busy give us reasons we can understand and the benefits of joining in for our families. Also there needs to be a real focus on different groups of women (regardless of age, gender or sexual preference, religion and culture) as well and ensuring all unmet needs are considered and where possible met.'



Dr Helen O'Neill

Founder and CEO of Hertility Health

'UK FemTech start-ups should ensure that their solutions are scalable and address problems that women across the globe experience. To grow and scale most efficiently to reach women across geographies, it is also essential to foster and grow cross-border collaborations between leaders and experts in women's health internationally. Finally, it is essential to remember that FemTech is "not just a women's issue", and men's perspectives and experiences can help make the products more inclusive and serve the international community best.'

Key FemTech Hubs, Media Platforms, and Events in the UK

FemTech Hubs & Communities in the UK

1



Women of Wearables (WoW) is a global organisation aiming to inspire, connect, and support women and allies in emerging technologies such as wearable tech, IoT, HealthTech, and everything in between. With more than 20,000 members, WoW has become a global movement that supports its growing community through events, mentorship, educational programmes, and collaboration.

2



FemTech Lab is a global ecosystem of start-ups, experts, and investors in women's health and wellness. It targets early-stage FemTech companies on a mission to make the world a better place by empowering women. Based in London, the 12-week accelerator programme guides FemTech entrepreneurs and start-up founders from across the world.

3



FemTech.Live is a media platform pulling together the latest news and opinions from technology, science, investment, and leadership. FemTech.Live aims to educate and inspire people to join the FemTech movement. It is powered by FemTech Lab.

4



FemTech Insider is a source for all things FemTech worldwide and is known for its industry-leading newsletter. The detailed brief has information on deals, company and product launches, interviews, and FemTech and HealthTech industry insights. It also shares new jobs, research, and resources on a weekly basis.

5



FemTech North is a knowledge-sharing platform created to promote the FemTech Industry and support developments and increased awareness of women's health. The company has a focus on the UK and has links with FemTech organisations, companies, stakeholders, and investors worldwide.

6



Cambridge FemTech Society aims to connect motivated students and alumni with FemTech entrepreneurs, investors, and researchers by organising talks, panel discussions, and networking events.

7



Femstreet started as a newsletter for women in start-ups and venture capitals. It has since evolved into a global community with 15,000 subscribers, events in the US and Europe, and a premium Slack community.

Key FemTech Hubs and Media Platforms

1

Women'sHealth

Women's Health is a smart, inspiring, and trusted online resource about health, beauty, food, fitness, and sport wearables for women.

2

 **The Well** ^{HQ}

The Well HQ is an online community for women that offers monthly courses, consultations, access to expert information, connections to peers, and experts in the areas of women's health and sport topics.

3



Bupa Women's Health Hub explores key health concerns for women, from expert advice about particular conditions to screening information and guides for the workplace.

4



Women's Health Matters is a promotional online resource to support healthcare professionals involved in the area of Women's Health. It provides meetings, webinars, online learning, and other products.

5



Women's Health Concern (WHC) is the patient arm of the British Menopause Society (BMS). They provide a confidential, independent service to advise, reassure, and educate women of all ages about their gynaecological and sexual health, well-being, and lifestyle concerns.

6



Tommy's Pregnancy Hub is an organisation that carries out research into the causes of miscarriage, stillbirth, and premature birth. They support women throughout their entire pregnancy journey from conception to postpartum recovery.

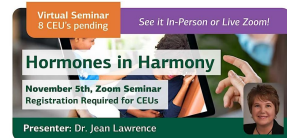
Upcoming FemTech Events



Future Dreams Breast Health Masterclass
2 November 2022



Women's Wellness Wednesdays: Antenatal Health and Well-Being
2 November 2022



Hormones in Harmony
5 November 2022



Women's Wellness Wednesdays - preconception and IVF nutrition
9 November 2022



Modernizing Women's Health: Elevating Quality Care
9-10 November 2022



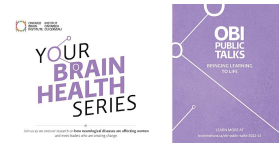
FemTech Hub Open Day
15 November 2022



Women of Silicon Roundabout
22 November 2022



Digital Healthcare World Congress
29-30 November 2022



Your Brain Health Series: Women's Brain Health
7 December 2022

Opportunities and Challenges

Opportunities & Challenges in the UK

Opportunities

Massive Market Opportunity

FemTech is growing at an incredible pace. In 2018, UK FemTech start-ups raised around \$93 million. In 2019, the FemTech space surpassed \$200 million in funding, rising to almost \$700 million in 2021.

Wide Selection of Products

With a wide range of innovative FemTech products focused on menstrual health, breast cancer, sexual health, and contraception, healthcare is becoming more diverse and affordable to women.

FemTech in the UK is Attractive to Investors

The top applications that have recently gained the most funding and attracted the largest number of users are innovative solutions mainly concerning fertility, reproductive health, period tracking, and sexual health testing.

Challenges

Lack of Clinical Trials

Studies have predominantly been carried out on male test subjects, including at animal and even cell testing stages, without considering that drugs and medical conditions can affect the female body differently.

Raising Capital for Female-Led Start-Ups

One of the key issues is the challenge for female-led start-ups of raising capital. Given that most investors are men, the lack of understanding of female healthcare needs makes them reluctant to invest in female-specific products.

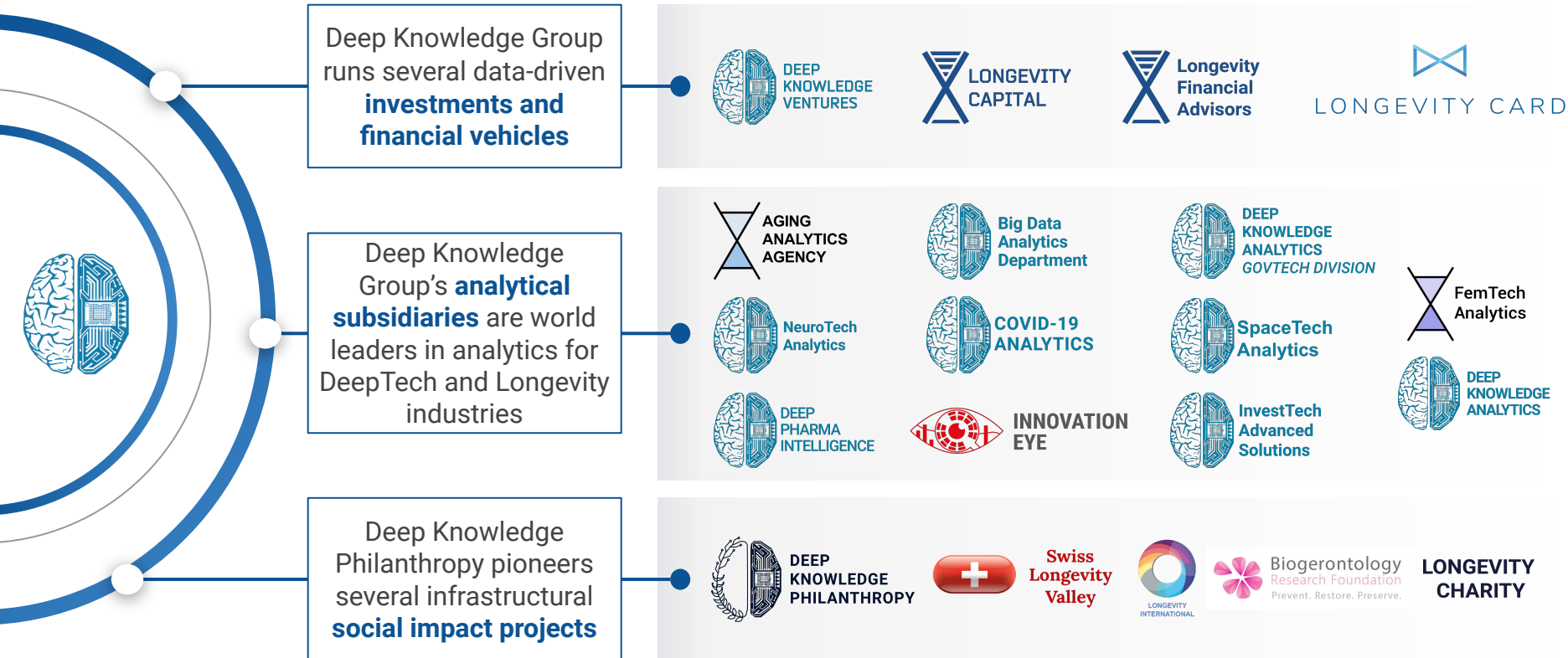
Lack of Diagnostics of Health Issues Specific to Women

Menstruation, menopause, and pregnancy have traditionally been treated as taboo topics and, as a result, have been overlooked and under-researched. Consequently, women with such conditions are poorly diagnosed.

Key Takeaways

- **The United Kingdom represents an opportunity for the further development of the FemTech Industry.** With more than 145+ FemTech companies and 155+ investors, it offers growth opportunities for FemTech companies. New and upcoming companies can expect to receive funding not just from private investors but also from several nonprofit organisations.
- **The UK market is highly developed in both its technological and structural aspects.** It admits entry for the newer participants, allowing the realisation of their potential. With the overall high involvement of the UK in the healthcare sector and the interconnections between healthcare and FemTech, the attractiveness of the country's market to the FemTech companies keeps increasing, which heightens the number of participants.
- **A number of UK companies and start-ups involved in the FemTech Industry have attracted the attention of increasing numbers of users across the world.** The services of companies such as Elvie, Vira Health, Apricity, and Flo are used by tens of thousands of women globally every day.
- **The UK FemTech sector benefits from the country's strong involvement in fields of research and development generally, regardless of industry.** Because of this, the FemTech sector boasts a number of R&D hubs in the country, and both private and governmental entities are involved in funding and growing start-ups in the industry.
- **Overall, the FemTech Industry has a lot of potential to keep growing in United Kingdom.** The number of FemTech companies is expected to keep rising and, in general, the industry is expected to flourish in the country.

About Deep Knowledge Group



About FemTech Analytics

FemTech Analytics (FTA), an analytical subsidiary of **Deep Knowledge Group**, is a strategic analytics agency focused on the emerging FemTech sector. FTA offers a range of services including research and in-depth analysis on the FemTech industry; profiling of companies and government agencies according to their innovation potential and business activity; and consulting and analytical services to advance the FemTech sector as a whole.

FemTech is Focusing on Three Key Activities:

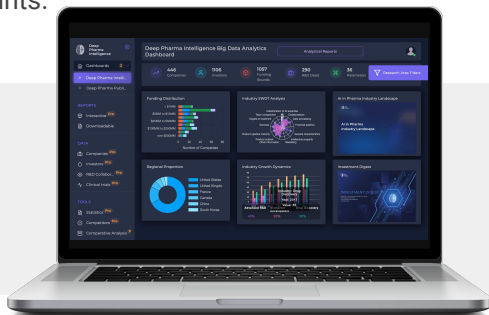
Market Intelligence

Producing regular **open-access and proprietary reports** on the emerging topics and trends in the FemCare industry. All reports are supported by our back-end analytics systems and tools that allow to receive fresh insights and updates about opportunities and risks.



Big Data Analytical System & Dashboard

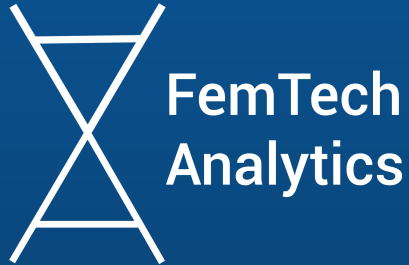
Building a comprehensive **Big Data Analytical System & Dashboard** (SaaS) as a one-stop-platform for all market and business intelligence operations our customers may need, including profiling thousands of companies, market signals and trends based on tens of millions of constantly updated data points.



Virtual Events and Webinars

Organizing **virtual conferences** featuring a FemTech influencers, including founders & CEOs of startups and established companies, investors, scientists and other key players in the Women's Health industry.





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