

FemTech and the Femaging Opportunity

The Trend, the Gap, the Collaboration Opportunity

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ABOUT

THE FEMAGING PROJECT

www.femaging.com

WHAT IS

THE FEMAGING PROJECT

The FemAging Project delivers, research, education and insights to health and tech industry leaders, and investors, to help drive global innovation focused on the unique health and wellness needs of women ages 40+. FemAging Project Priorities



FOUNDERS

THE FEMAGING PROJECT



Denise Pines

Long-time community health advocate

Top 150 FemTech Leaders List

Founder: WisePause Wellness: The Menopause Authority

Board of Directors, Federation of State Medical Boards

Former President: California Medical Board



Fard Johnmar

Digital health futurist and innovation strategist

Co-author of the #1 global bestseller: ePatient 2015: 15 Surprising Trends Changing Healthcare

Founder: Enspektos, LLC Innovation Fellow, HITLAB

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THE CURRENT FEMTECH LANDSCAPE

WHAT IS

FEMTECH

FemTech consists of services, and products that improve women, females, and girls' health and wellness. This includes addressing challenges that solely, disproportionately, or differently affect them.



FEMTECH

CATEGORIES

Source: FemTech Landscape, FemTech Focus, 2021

FEMTECH INCLUDES

SEXUAL

Dyspareunia

Hygiene

Pleasure





REPRODUCTIVE MENSTRUAL

Contraception Pre & Post Natal Care Pregnancy & Nursing

PMS Endometriosis Fibroids









Osteoporosis Carpal Tunnel Life in Remission Scoliosis

BRAIN Mental health Alzheimer's Migraines

Rheumatoid arthritis Lupus

HEART Heart Attack Stroke Arrhythmias

PRODUCTS TYPICALLY FALL INTO ONE OF THESE CATEGORIES





PELVIC FLOOR VAGINAL Fecal Incontinence

Laxity / Atrophy Dryness Microbiome





Urinary Incontinence

Prolapse





FEMTECH PRODUCT FOCUS AREAS :

CPG AND MENSTRATION/ **SEXUAL WELLNESS**

ANALYSIS OF FEMTECH PRODUCT TYPES

25%

enstruction

25%

20%

Companies 12%

Total FemTech

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Percentage

10%

5%

0%

The most common product type in FemTech is consumer product goods (CPG). Menstrual Hygiene and Sexual Wellness contribute to CPGs the most with 38% and 18% of the total count, respectively. Digital Health products are dominated by fertility (24%) and maternal health (19%) apps for aspiring and current mothers. The majority of marketplace products are for maternal health. Logistics encompasses services such as breast 13.5% milk storage and transportation, lactation suites, and menstrual product dispensers in public restrooms. Consumer digital products include products such as subscription based video tutorials for pelvic 10.7% floor training or lactation classes. Apparel does not include all female clothing but rather specific garments that address a female-specific 7.3% health condition. 6.5% 4.3% 4.1% 2.7% 2.3% 2.2% 2% 2% 1.8% 3% Educational Postorm Medical Device THEOREMEDING Heatincale saturate consumer Digital modulet Holid Health Diognostic Morkelphoce SUPPlements Digital Community Wedden Procedure Apporei Insurec

MOST FEMTECH EXITS ARE:

IN THE AREA OF MATERNAL HEALTH

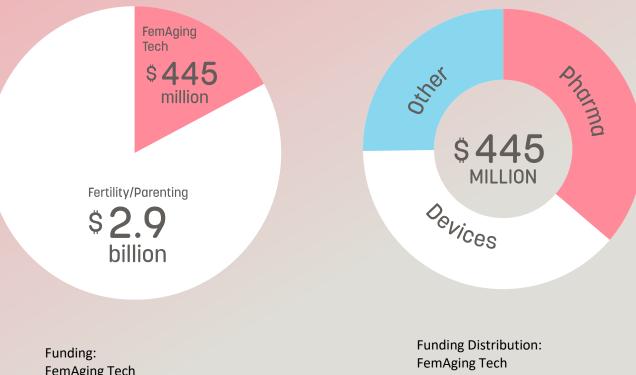


Source: FemTech Landscape, FemTech Focus, 2021

FUNDING LEVELS ALSO INDICATE

Global Funding: FemAging Tech vs. Parenting/Fertility Innovations

MARKET IS VERY **MUCH FOCUSED ON MATERNAL HEALTH**



FemAging Tech vs. Fertility/Parenting

THE UNMET NEED

THE MISSING **OPPORTUNITY IN FEMTECH**

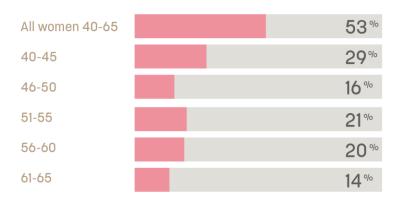
U.S Population: Women of Childbearing vs. Late/Non-Childbearing Age

US Female Population Ages 15-65



Ages 40-65 Late/Non Childbearing Age MILLION

U.S Women Ages 40 to 65 with Annual Income Above \$75,000



POPULATION DATA SOURCE: STATISTA 2019

SOURCE: FEMAGING INDEX 2020

THE MISSING PIECE:

100% FOCUS ON OLDER WOMEN'S NEEDS

There is a need for increased and sustained work in the area of health among women age 40+ in menopause and beyond – because their needs, wants and desires are unique and underappreciated.

The Demographic Opportunity

The global population of women ages 40-60 is growing daily and an estimated 1.1 billion women will be in this age segment by 2025.

UNDERSTANDING THE GAP

OLDER WOMEN'S HEALTH AND WELLBEING NEEDS

FEMAGING PROJECT RESEARCH



FEMAGING 2020

THE FEMAGING INDEX

A nationally representative survey of 1,000 U.S. women ages 40 to 65 providing unique data about women's most critical health and wellness needs as well as the features they want most from products and services.



FEMAGING 2020

THE FEMAGING CENSUS



The Vast, Yet Virtually Untapped Opportunity in FemAging Tech Today

WHAT IS

FEMAGING TECH

FemAging Tech includes innovations such as software, diagnostics, devices, nutraceuticals, wearables, pharmaceuticals, clothing and other products and services developed specifically for women ages 40+.



FEMAGING INDEX

SIGNIFICANT HEALTH CONCERNS

Women 40 to 65 who say they have significant or very high concern about staying active, healthy and independent as they age.



FEMAGING INDEX

WOC ARE EVEN MORE CONCERNED

African American, Hispanic and Asian Women 40-65 who say they have significant or very high concern about staying active, healthy and independent as they age.

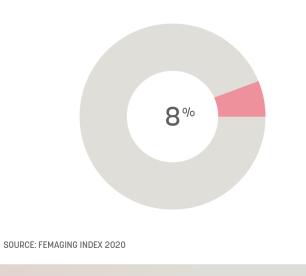
CAUCASIAN	52 %
AFRICAN AMERICAN	66 %
HISPANIC	62 °/°
ASIAN	52 %

FEMAGING INDEX

THE MENOPAUSE TREATMENT GAP

Few Older Women are Receiving Menopause Care

Women 40-65 Receiving Menopause Care (Who are Currently Experiencing Symptoms)



But, Older Women of Color are Even Less likely to Receive Menopause Care

Women of Color olor 40 to 65 Receiving Menopause Care (Who are Currently Experiencing Symptoms)

AFRICAN AMERICAN	5 %
HISPANIC	4 °/o
ASIAN	5 %
SOURCE: FEMAGING INDEX 2020	

THE INNOVATION OPPORTUNITY

NEEDS VS. AVAILABLE INNOVATIONS

Few FemAging Tech Products Focus on Older Women's
Most Important Health NeedsFatigueThinning Hair47 %30 %5 %3%

45%

8 %

35%

11 %

Stress/Anxiety

Mood Swings

Forgetfulness

	30) %
	2	º/o
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Bone Health

17	º/o
6	º/o

VS

% of Women who say issue is important to Manage*

% of FemAging Tech Products Focusing on Issue

Source: FemTech Index, Femaging Tech Census 2020

THE INNOVATION OPPORTUNITY

NEEDS VS. AVAILABLE INNOVATIONS

Women Want Most Healthy Aging Support At-Home Lab Tests **54**[%] 34% 18% 1 % Access to Physicians Menopause Tracking 43% 31 % **9** % 10 % **Stress Management Tools** Sexual Health Tools 36% 28% 7 % 19 % % of FemAging % of Women

Many FemAging Tech Products are Missing Features

Source: FemTech Index, Femaging Tech Census 2020

% of WomenInterested inProduct Feature



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DEFINING THE FEMAGING TECH LANDSCAPE

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FemAging Tech 20

KEY HEALTH/WELLNESS CATEGORIES AND INNOVATIONS IN FEMAGING TECH



Innovators Developing Solutions Well Aligned With Older Women's Most Critical Health, Wellness and Well-being Needs

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FEMAGING PROJECT AREAS OF FOCUS

FEMAGING PROJECT

SCOPE OF ACTIVITIES



October 7, 202 9am to 11am PT

www.femaging.com

VIRTUAL EXCHANGE

THE FemAging ERA

Advancing Women's <u>HealthTech</u> Innovation and Investment

Discussion and Pitch Event



Research

FemAging Tech Census 2020

The Vast, Yet Virtually <u>Untapped</u> Opportunity in FemAging Tech Today

Premium Insights: Newsletter and Peer-to-Peer Engagement

Events and Pitch Competitions

COVID-19 and the Mental Health Solutions Gap



WHAT'S NEXT

COLLABORATION AND ENGAGEMENT OPPORTUNITIES

www.femaging.com

Events and Education

Helping us engage with and educate other investors, health industry stakeholders

Innovation Acceleration

Participating in events to vet and consider funding FemAging Tech innovations

Research and Analysis

Helping to make new FemAging research and analysis possible; and receive quarterly private briefings on insights to help investors understand and identify opportunities

Other Activities

FemAging Intelligence newsletter January 15, 2022 FemAging Event & Pitch Competition April 21, 2022