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Procurement and Supply Management



Market Landscape Review of Fertility Awareness-based Apps in LMICs

October 18, 2023

Why are fertility awareness-based apps important for global health supply chains?

- **Explosion of smartphones around the world.** In 2022, smartphone adoption reached 50% in sub-Saharan Africa. Smartphone connections are anticipated to reach 600 million in 2024, pushing smartphone adoption to 61% in the region by 2025.
- **Increased desire for non-hormonal contraceptive options.**
- **Popularity of FAM apps could affect demand for FP commodities moving forward.** Important to better understand how women are using apps to inform contraceptive decision-making and the role that FAM apps play in ensuring contraceptive security.



Data vendor



42matters is a mobile data intelligence company that offers app intelligence from millions of mobile apps and publishers and has previous experience with USAID projects.







- **Data Depth:** Granular data by mobile application and country, app downloads, monthly active users, ratings, and sentiment analysis.
- **Coverage:** 63% of USAID FP/RH priority countries.

Countries covered by 42matters

USAID FP/RH priority
(26/41)

- | | | |
|------------------|----------------|-----------------|
| 1. Bangladesh | 9. Haiti | 18. Philippines |
| 2. Benin | 10. India | 19. Rwanda |
| 3. Burkina Faso | 11. Kenya | 20. Senegal |
| 4. Cambodia | 12. Mali | 21. Tanzania |
| 5. Cameroon | 13. Mozambique | 22. Togo |
| 6. Cote d'Ivoire | 14. Nepal | 23. Uganda |
| 7. Egypt | 15. Niger | 24. Yemen |
| 8. Ghana | 16. Nigeria | 25. Zambia |
| | 17. Pakistan | 26. Zimbabwe |

Top apps with highest monthly active users (MAU)

		Total Downloads in the past 12 months	MAU
	Flo Ovulation & Period Tracker	5,486,233	2,860,463
	Period Calendar Period Tracker	1,999,742	1,954,298
	Mylo Pregnancy & Parenting App	3,118,511	1,356,117
	My Calendar - Period Tracker	823,585	945,590
	MeetYou - Period Tracker	10,008,841	809,440
	Clue Period Tracker & Calendar	562,738	469,869
	Ovulation & Period Tracker	1,032,880	467,010
	Ovulation Calendar & Fertility	312,635	369,617
	Wocute - Period Calendar	2,550,021	177,999

These 9 apps generated:

- 82% or 26 million out of 32 million total downloads for one year (July 25, 2022 – July 24, 2023) in PRH supported countries
- 90% or 11 million out of 12.2 million total MAUs for one month (June 25 – July 24, 2023) in PRH supported countries

The data on the left is sorted by MAU which can be an indicator of retention and engagements rates. However, more in-depth research is required to determine engagement or retention rates.

Flo – #1 period and ovulation app worldwide



Available on



According to Flo, more than 250 million people around the globe use Flo as their ovulation and period tracker app, fertility calendar, and pregnancy assistant.

Features

- 1) Tracking including predictive ovulation calculators
- 2) Education: evidence-based articles created by doctors and health experts
- 3) Help Center to speak with experts on demand
- 4) Basic version is free

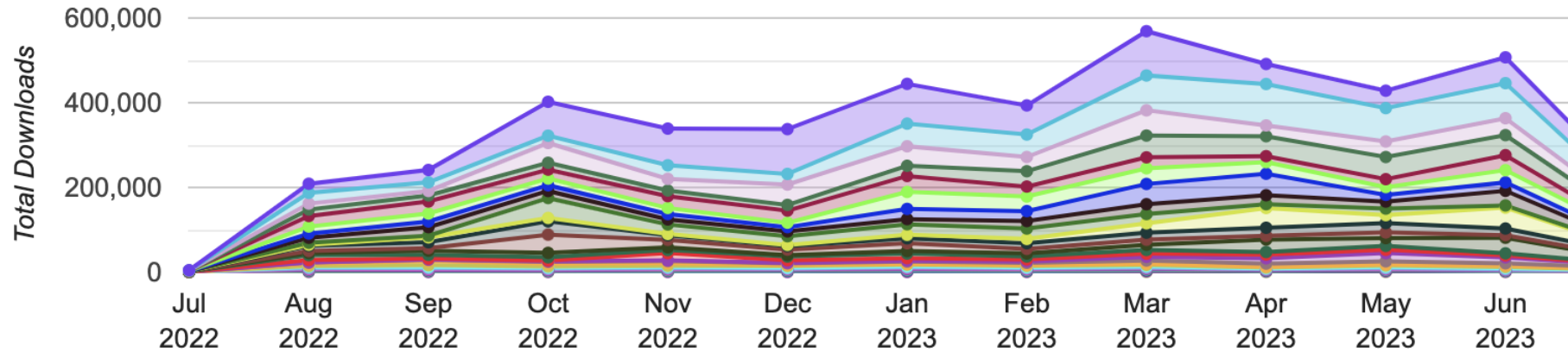
4.73 ★★★★★
3,108,993 reviews globally

Ads Detected No

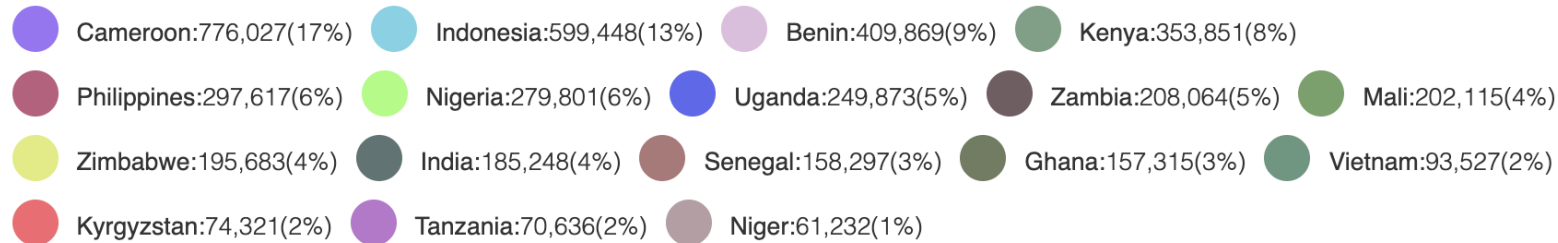
In-App Purchases Yes (\$7.99 - \$39.99 per item)



Flo – country downloads



Downloads in selected period 4,587,348



The number of downloads is trending upwards (July 2022 and July 2023 data not included).

Period Tracker Period Calendar – #2 app



Available on  



Features

- 1) Focus is on period racking, including predictive ovulation calculators and reminders
- 2) No educational content claims
- 3) Free

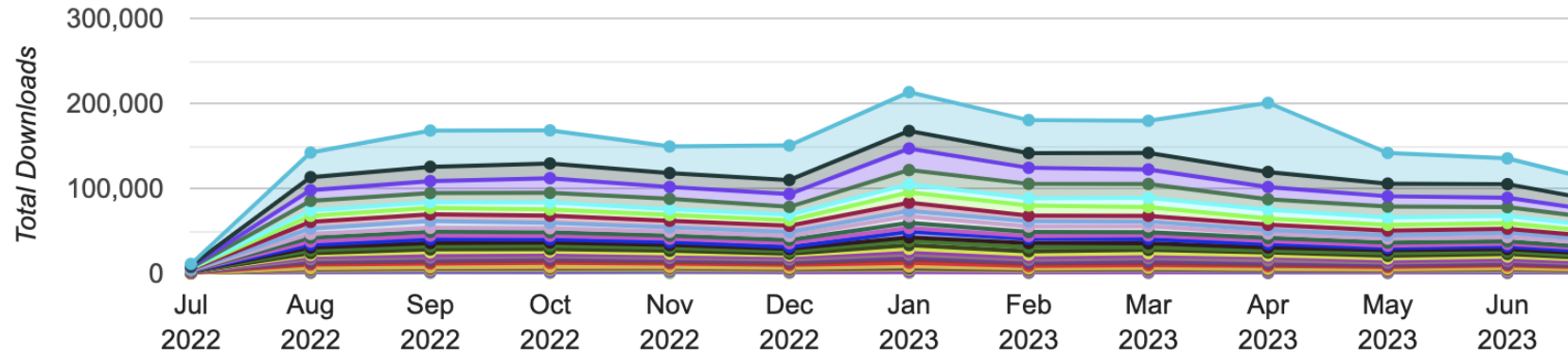
4.93 

6,022,388 reviews globally

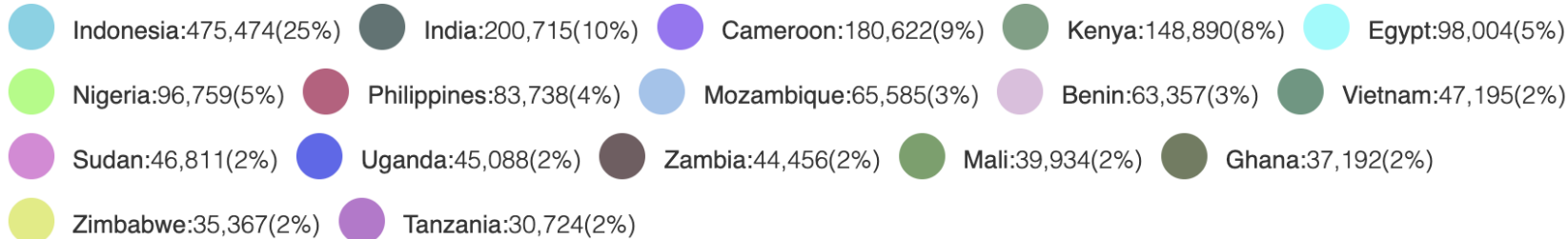
Ads Detected  Yes

In-App Purchases  Yes (\$0.99 - \$0.99 per item)

Period Tracker Period Calendar – country downloads



Downloads in selected period 1,940,545

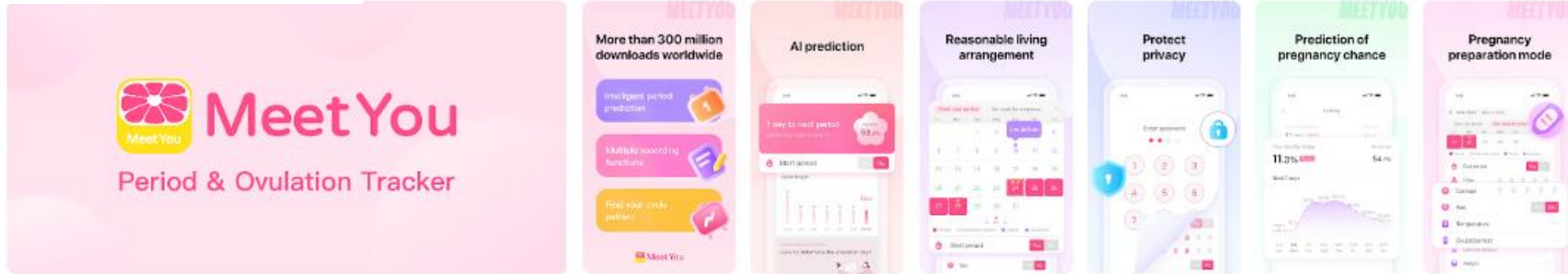


The split between Asian and African country downloads is about 50%-50%.



MeetYou Period & Ovulation Tracker – #5 app

Available on



App with the highest number of MAUs in Southeast Asia

Features

- 1) Tracking, including predictive ovulation calculators
- 2) Supports pregnancy and parenting
- 3) Basic version is Free

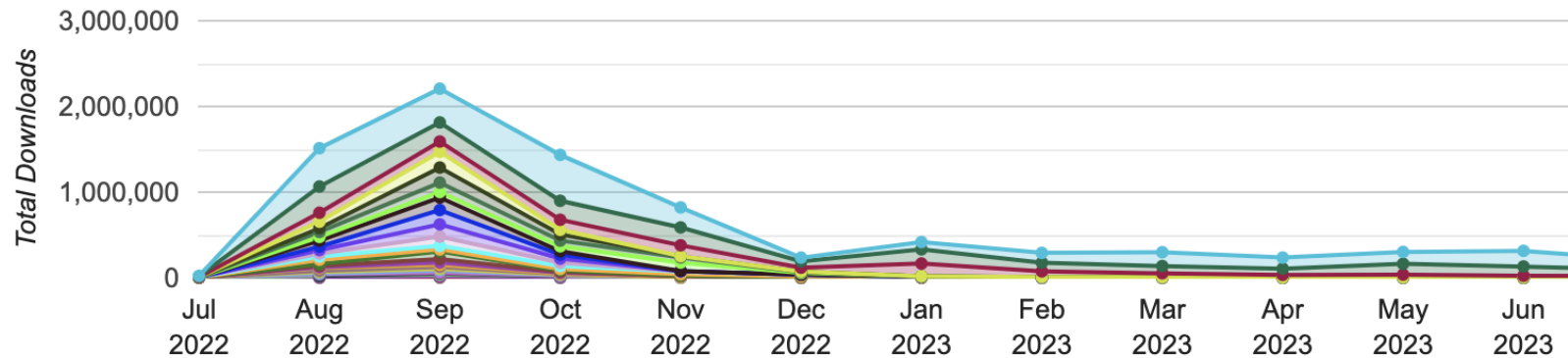
4.83

105,690 ratings globally

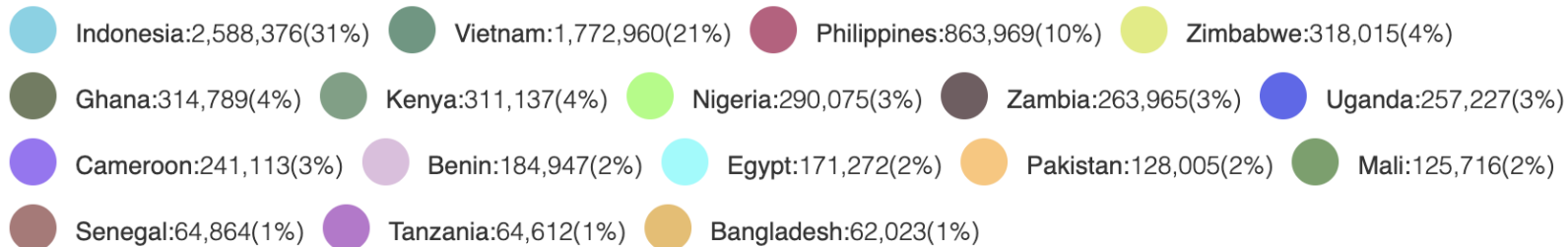
Ads Detected No

In-App Purchases Yes (\$0.99 - \$9.99 per item)

MeetYou Period & Ovulation Tracker – country downloads












Downloads in selected period 8,309,617



98% of downloads came from Indonesia, Vietnam, Philippines.

The remainder was shared among African countries.

Comparing PRH supported countries against all countries with data

		PRH supported countries		Global	
		Total Downloads in the past 12 months	MAU	Total Downloads in the past 12	MAU
	Flo Ovulation & Period Tracker	5,486,233	2,860,463	22,349,648	11,378,989
	Period Calendar Period Tracker	1,999,742	1,954,298	13,536,099	13,091,923
	Mylo Pregnancy & Parenting App	3,118,511	1,356,117	3,804,434	1,621,158
	My Calendar - Period Tracker	823,585	945,590	3,276,767	3,711,190
	MeetYou - Period Tracker	10,008,841	809,440	31,226,659	2,659,910
	Clue Period Tracker & Calendar	562,738	469,869	3,088,721	2,626,867
	Ovulation & Period Tracker	1,032,880	467,010	3,514,592	1,564,046
	Ovulation Calendar & Fertility	312,635	369,617	791,937	798,344
	Wocute - Period Calendar	2,550,021	177,999	8,254,874	687,955

Ghana – downloads for 12 months and MAUs for 1 month

#1

Flo



#2

Period Calendar Period Tracker



#3

MeetYou



#4

My Calendar



#5

Ovulation & Period Tracker



#6

Mylo



Title	12 Months Downloads Country Specific	Monthly Active Users for GH
Flo Ovulation & Period Tracker	151,100	76,397
Period Calendar Period Tracker	36,250	34,905
MeetYou - Period Tracker	322,663	24,585
My Calendar - Period Tracker	18,292	20,900
Ovulation & Period Tracker	33,799	14,966
Mylo Pregnancy & Parenting App	26,692	11,581
Ovulation Calendar & Fertility	5,934	6,956
Grace Health period tracker	113,410	5,911
AI Fertility Ovulation Tracker	16,145	4,371
Clue Period Tracker & Calendar	4,219	3,806
Total	728,504	204,378

Ghana – comparing app data to FP commodity deliveries

- Top 10 FAM apps had **728,504** downloads in one year and **204,378** MAUs in one month.
- When compared to other methods delivered during the same one-year period, apps appear to be a significant option selected by women for contraception.
- Although MAUs are more indicative of engagement than downloads, there are limitations to comparing one month of MAUs to FP deliveries in the past year.

FP Deliveries to Ghana as Reported in the VAN

Product	Quantity delivered (July 2022-July 2023)
Standard Days Method	5,000
Etonogestrel 68 mg/rod, 1 Rod Implant	98,006
Levonorgestrel 1.5 mg Tablet, 1 Tablet	3,906
Levonorgestrel 30 mcg Tablet, 35 Tablets/Cycle	141,840
Levonorgestrel 75 mg/rod, 2 Rod Implant	36,700
Levonorgestrel/Ethinyl Estradiol 150/30 mcg + Ferrous Fumarate 75 mg, 28 Tablets/Cycle	6,620,139
Medroxyprogesterone Acetate 104 mg/0.65 mL, Subcutaneous	1,040,200
Norethisterone Enantate/Estradiol Valerate 50/5 mg/mL Ampoule, Intramuscular	420,700
TCu380A Intrauterine Device	24,350
Male Condoms	2,059,200



Summary

- The fertility awareness-based mobile app market is consolidated: 9 apps cover 82% of downloads and 90% of MAUs. Of these 9 apps, 6 are global and have a strong user base across multiple geographical locations while Flo is a market leader with the highest number of unique MAUs.
- With the explosion of smartphones globally and the increased interest in non-hormonal contraception options, the popularity of FAM apps is expected to continue to increase and may affect the demand for FP commodities in LMICs.
- Thus, it is essential to continue monitoring FAM app user data to better understand this growing trend and how women are using FAM apps to inform contraceptive decision-making.




Recommendations for next steps

1. Conduct further research and analysis of MAUs over a longer period as well as customer reviews to better understand user experience and sentiment of women in LMICs who use fertility awareness-based apps.
2. Using a secondary data source, examine the most popular features of widely used apps. This will lead to increased understanding of how women are using the apps.
3. Assess the quality of the most popular apps and assign a score or ranking for each. The quality measure should include both for use as a fertility tracker to get pregnant and a contraceptive method to avoid pregnancy.
4. Develop a more appropriate CYP measurement for FAM apps to better estimate the protection provided and compare to other methods. Currently, the conversion factor for FAM is 1.5 CYP per trained adopter. However, many app users are unlikely to be trained.
5. Increase understanding of the relationship between overall downloads and MAUs. Why do some apps have more MAUs than downloads? Why do some apps attract, retain, and/or lose users? What does this mean for contraceptive security?
6. Explore opportunities for collaboration between donors and FAM app developers, especially in those LMICs where FAM apps are increasingly popular.



Q&A



The USAID Global Health Supply Chain Program-Procurement and Supply Management (GHSC-PSM) project is funded under USAID Contract No.AID-OAA-I-15-0004. GHSC-PSM connects technical solutions and proven commercial processes to promote efficient and cost-effective health supply chains worldwide. Our goal is to ensure uninterrupted supplies of health commodities to save lives and create a healthier future for all.The project purchases and delivers health commodities, offers comprehensive technical assistance to strengthen national supply chain systems, and provides global supply chain leadership. For more information, visit ghsupplychain.org.

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