



Digital Health Ecosystem Key Trends

Mental Health

Thematic Report

Ecosystem Insights • Investment Trends • Venture Spotlight
Noteworthy Deals & Exits



EXECUTIVE SUMMARY

- There are **501 active, private Digital Health ventures** distributed globally with a solution in Mental Health, but only **12% of the venture funding** raised in Mental Health was deployed to **ventures outside of North America**
- 96% of the products developed by Digital Health ventures focused on Mental Health are **Mobile Applications**, and 23% of the products are in the category of **Wellness Apps**
- **Insurance companies comprise 40%** of the partnerships that have been announced for Mental Health ventures, while institutions and universities capture 20%
- Mental Health is the **top therapeutic area** for venture funding value in **North America and Europe**, but it does not even appear in the top 5 therapeutic areas in Asia Pacific and the Middle East
- **Telemedicine and Patient Solutions** have been the dominant clusters over the past 2 years, for venture funding value. **71% of the Mental Health venture funding value** for H1 2021 was deployed to ventures in these clusters



1 Unmatched global coverage

2 Cutting edge HealthTech innovation solutions

3 Proven team track record

MENTAL HEALTH DIGITAL HEALTH DIGEST:

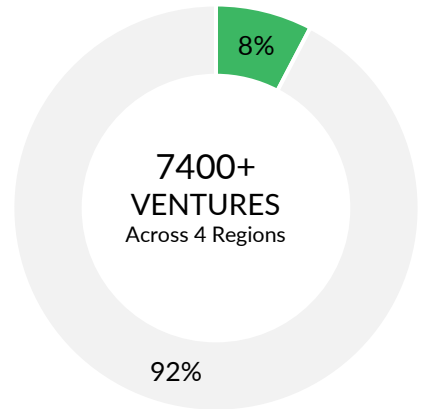
cumulative 2017 - H1 2021

501
VENTURES

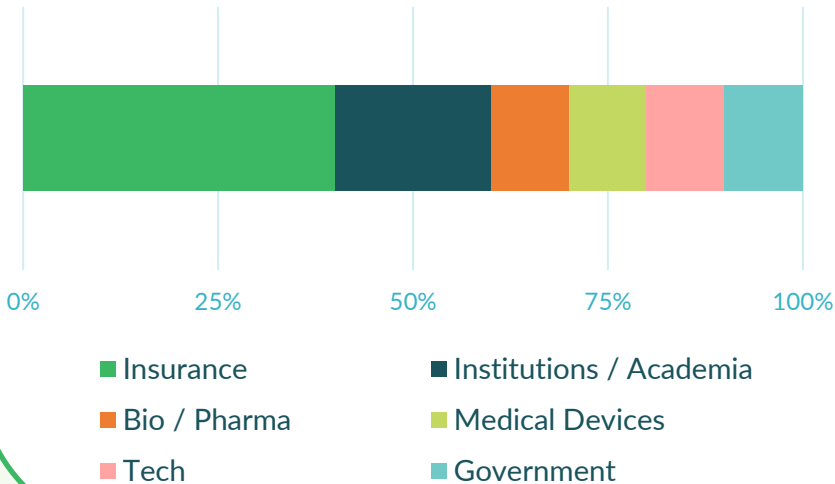
525
PRODUCTS

\$6.12B
INVESTED

Global Proportion of Ventures



Distribution of Venture Partners by Organisation Type



- Mental Health
- Other Therapeutic Areas

REPORT CONTENTS:

ECOSYSTEM INSIGHTS

INVESTMENT TRENDS

CLUSTER FOCUS

REGIONAL ECOSYSTEMS

NOTEWORTHY PARTNERSHIPS, DEALS & EXITS

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