

K O L P E R C E P T I O N

# IN FERTILITY

US & EU Fertility KOL Survey | n = 40 Respondents

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40

KOL Respondents

8

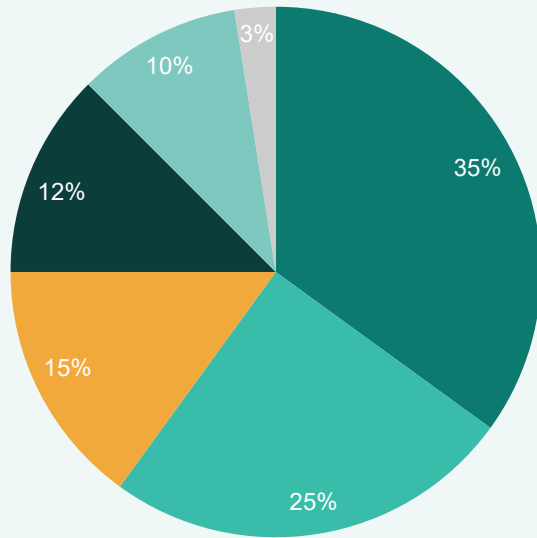
Survey Questions

2

Regions Covered

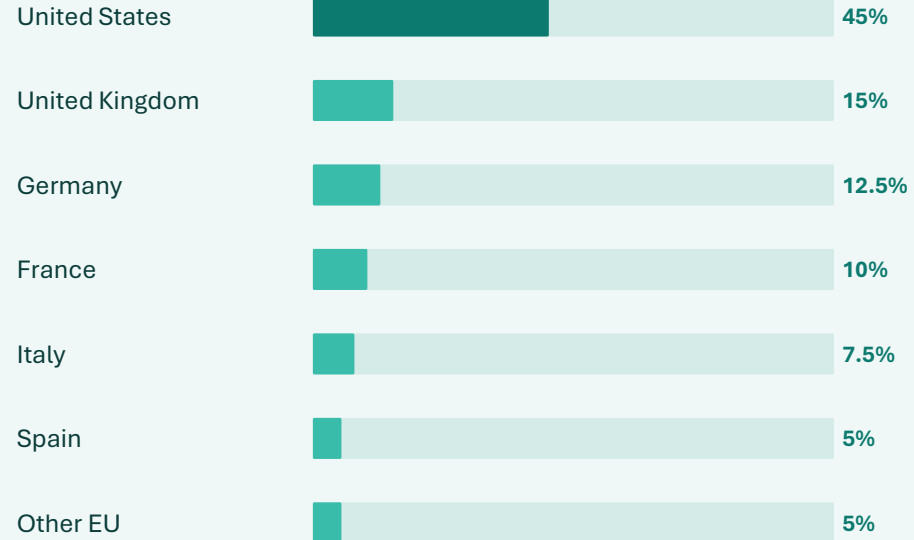
# RESPONDENT PROFILE

## Who we heard from

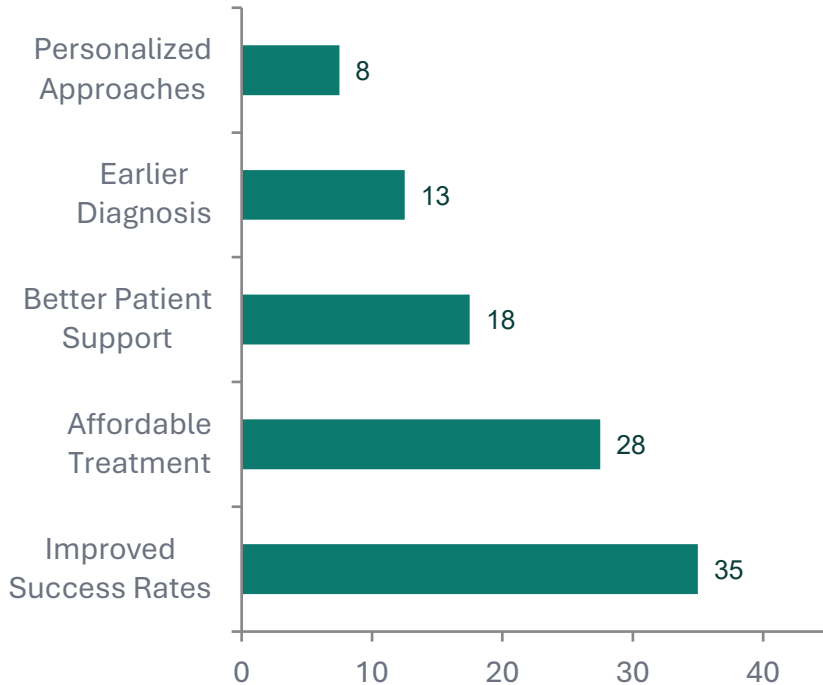


■ Repro Endocrinologist ■ IVF Specialist ■ Clinic Director  
■ Embryologist ■ Academic/Research ■ Other

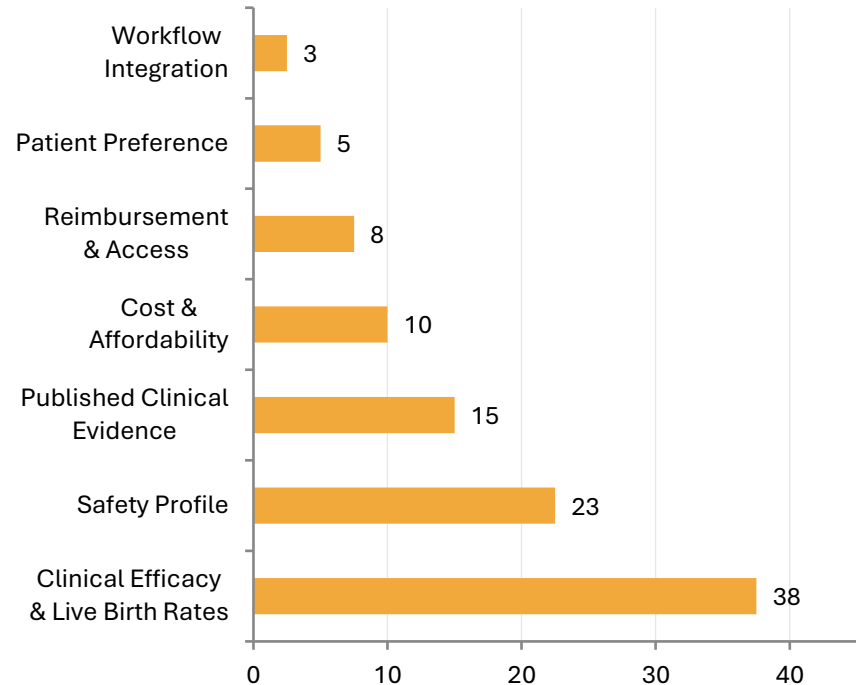
## By Region



## Top Unmet Needs



## Key Decision Drivers



# INNOVATION LANDSCAPE

Emerging technologies expected to have greatest impact in the next 5 years

## AI-Driven Embryo Selection

12 KOLs · 30%

## Fertility Preservation

3 KOLs · 7.5%

## Genetic Testing Advancements

9 KOLs · 22.5%

## Digital Patient Monitoring

2 KOLs · 5%

## Non-Invasive Diagnostics

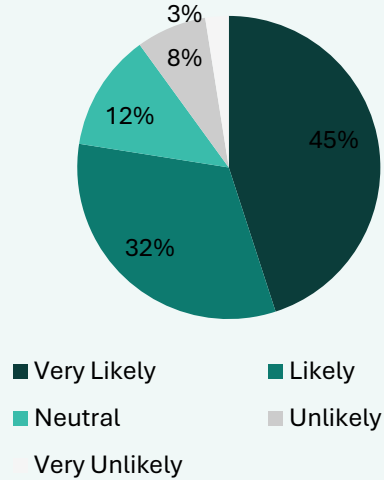
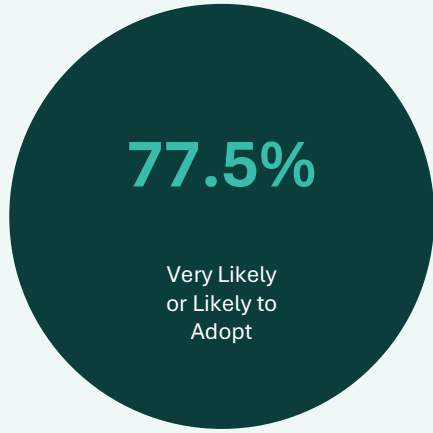
7 KOLs · 17.5%

## Regenerative / Stem-Cell

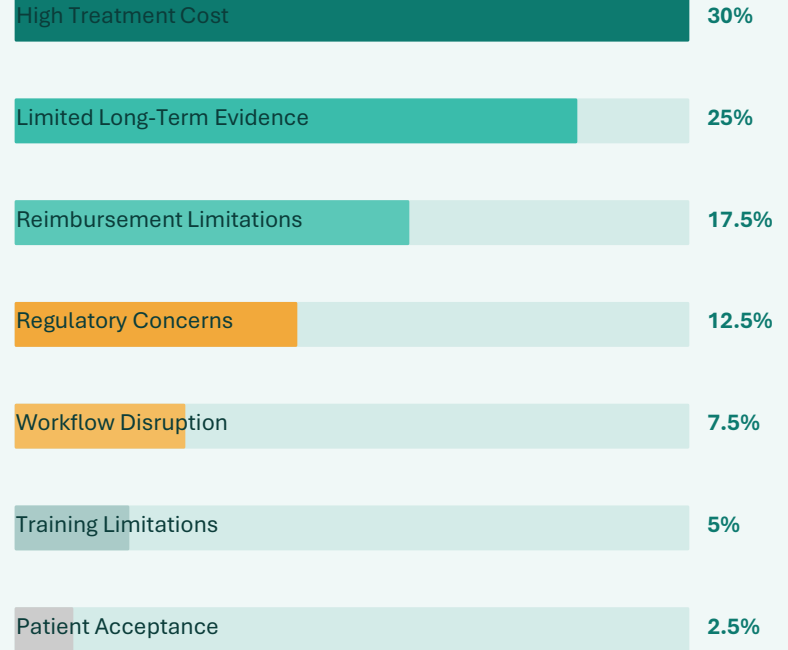
2 KOLs · 5%

## Personalized Stimulation Protocols

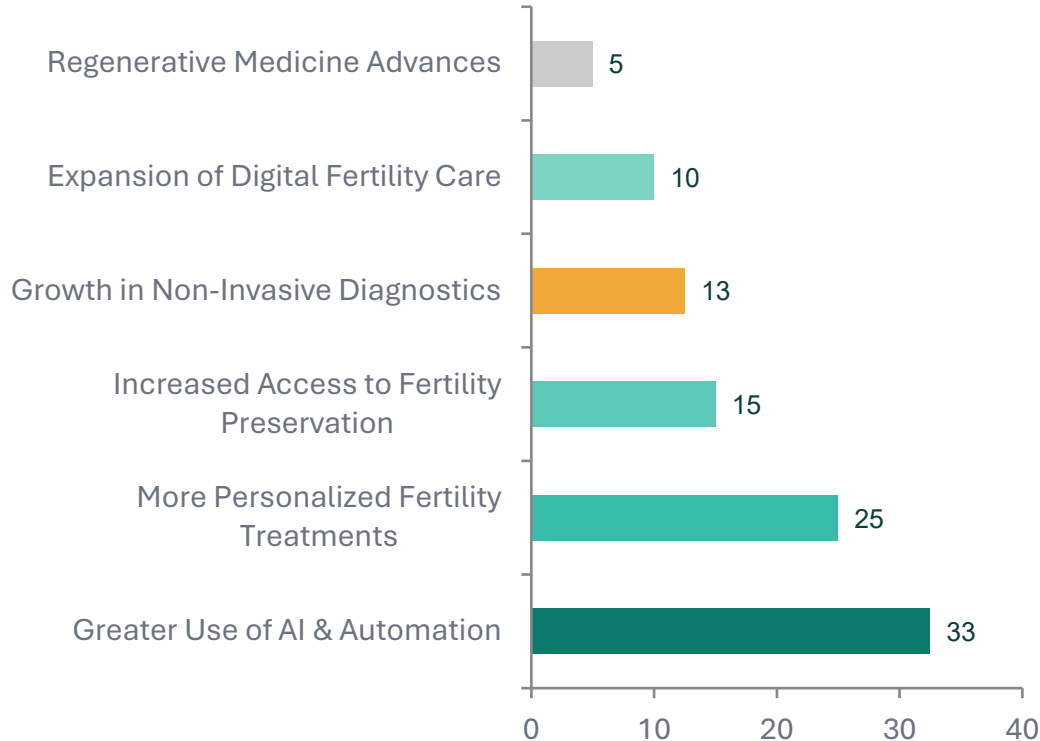
5 KOLs · 12.5%



## Primary Adoption Barriers



Biggest expected changes in fertility care over the next 3–5 years



## AI Takes the Lead

32.5% of KOLs expect AI & automation to be the defining shift in fertility care

## Personalization Next

25% foresee individualized treatment protocols reshaping patient outcomes

## Access & Preservation

Fertility preservation access ranks 3rd, signaling growing demand for elective care

# STRATEGIC IMPLICATIONS

Key actions for stakeholders across the fertility ecosystem

## Fertility Clinics

Integrate AI tools & personalized treatment protocols to close the efficacy gap

## Pharma / MedTech

Strong opportunity for evidence-based innovation; build long-term clinical validation pipelines

## Payers & Reimbursement

Rising demand for affordable fertility access; expand coverage frameworks now

## Academic Researchers

Prioritize long-term RCTs addressing cost-effectiveness and safety of novel technologies

## Digital Health Players

Expand fertility monitoring and patient engagement platforms; market is ready



# Thank You

Do you have any questions?

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