



Research 2 Guidance

Ro074G

ACTIVATION REQUIRED
CLONING INFORMATION TO PREDETERMINED LOCATION

The background image shows a hand holding a glucose meter. A smartphone is overlaid on the meter, displaying a graph. The entire scene is set against a dark, futuristic interface with various data visualizations and text elements.

DIGITAL DIABETES CARE MARKET 2018-2022

READY TO TAKE OFF

www.research2guidance.com

A market study about diabetes apps, connected devices, and services

3rd edition, 3rd September 2018

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Digital Diabetes Care Market Report 2018

WHAT IS THIS REPORT ABOUT



This report is the third publication based on our digital diabetes care market coverage. **The main aim of this report is to analyze what impact digital solutions have and will have on the global diabetes markets.** The report provides details about the current status and size of the global digital diabetes care market, discusses and evaluates trends, identifies top-10 countries and competitors and provides an outlook for the future market development.

DIABETES IS A GLOBAL EPIDEMIC

- 425 million people suffered from the condition in 2017 and this group is expected to grow to 629 million in 2045¹
- Diabetes is one of the major cost drivers in the healthcare systems of countries most affected by the epidemic
- Global spending for diabetes related care amounted to more than \$700B in 2017²

IMPACT OF DIGITAL DIABETES SOLUTIONS TODAY AND IN FIVE YEARS

Digital solutions for diabetics promise to disrupt the diabetes care market, but what impact do they currently have and how will it change in the next five years?

- Best-in-class digital diabetes care solutions today are ecosystems that consist of apps, connected devices, coaching services, and HCP dashboards
- There are more than 2,000 digital services for diabetes patients available globally
- Millions of diabetes patients are already using digital diabetes care solutions and they are coming from all regions of the world
- Payer organizations have started to accept and close hundreds of partnership deals with digital diabetes care providers
- Multiple studies demonstrate the positive impact of digital care on HbA1C levels and to a lesser degree on cost savings
- Market revenues tripled since last year building on six main revenue sources. Forecast for 2022 pegged at almost \$1B
- Leading digital diabetes care companies are now valued at more than \$500M

THE MARKET IS CURRENTLY BEST DESCRIBED AS “READY TO TAKE OFF”

WHAT OTHERS HAVE SAID:

“The report by research2guidance is comprehensive and far reaching. It is a really valuable piece of market intelligence.”

- Petra Wilson, Former President, IDF

“Once again, with the latest Diabetes App Market Report Research2Guidance publishes the definitive industry overview on the current state and future trends in app delivered digital diabetes care.”

- Jeff Dachis CEO, Founder, OneDrop

¹ IDF 2017

² IDF Diabetes Atlas, 8th Edition (2017)

IN A NUTSHELL

- ✓ Full market study report
- ✓ Market history 2008-2017
- ✓ 5-year forecast 2018-2022
- ✓ Trends
- ✓ State-of-the-art digital solutions for diabetes patients
- ✓ HCP and payer services
- ✓ Top 10 countries
- ✓ Top 10 digital solution providers
- ✓ 99 pages
- ✓ 59 graphs
- ✓ Published September 2018
- ✓ 3rd edition

ABOUT R2G

Research2Guidance is a strategy advisory and market research company. We concentrate on the mobile app eco-system. We are convinced that mobile health solutions will make a difference in people's lives and that the impact on the healthcare industry will be significant. We provide market insights to assist in making this happen and assist in successfully leading businesses.



CONTACT THE ANALYST

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Digital Diabetes Care Market Report 2018

IT IS A DATA AND FACT BASED REPORT ABOUT DIGITAL SERVICES

Graphics and illustrations highlight insights, trends and forecasts. It is a very data driven report. To ease reading, each chapter is headed by a short summary.

DIGITAL SERVICES

Current offerings



MARKET EVOLUTION

Year 2008-17



FORECASTS

Year 2017-22



TRENDS

Top 20



COUNTRIES PROFILED

1. China
2. USA
3. India
4. Mexico
5. Germany
6. Brazil
7. Russia
8. Turkey
9. Japan
10. Spain



COMPANIES PROFILED

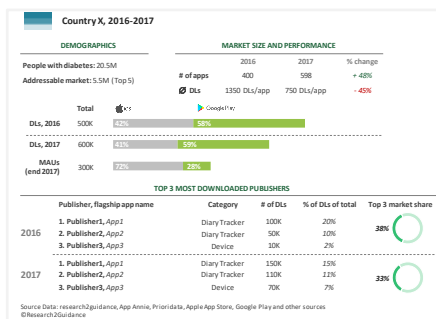
1. LifeScan
2. Social Diabetes
3. Informed Data Systems
4. MySugr
5. H2
6. cream.software
7. Dottli
8. Sirma Medical Systems
9. Dexcom
10. Airstrip Technologies



Profiles are used to describe top 10 countries and top 10 digital diabetes app publishers and their service offerings. Country profiles help to identify market opportunities. Competitor profiles show market performance and perceived digital strategy.

COUNTRY DASHBOARD

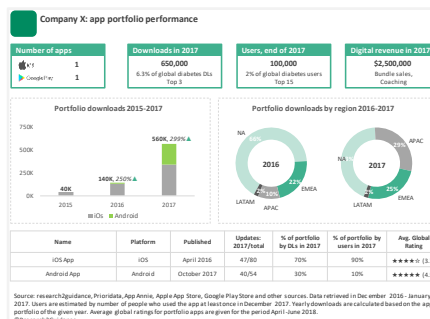
Demographics & Publishers



Country's market size, existing players and markets leaders

COMPANY DASHBOARD

All Key Apps' Performances



Company's performance statistics shown in dashboard format

Questions answered:



- What is the current status of digital solutions available in the market?
- Which countries offer the largest markets?
- What are the market prices for digital content, coaching services or bundles?
- Who are the key market players and what is their perceived strategy?
- What constitutes a "state-of-the-art" digital diabetes solution today?
- What is the potential market size for coaching services, connected devices, digital content and other revenue sources?
- And many more...

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1 SCOPE OF THE REPORT

This report is the third edition of the Diabetes App Market Report, with two previous editions being published in 2014 and 2016. The 2018 report takes into account the fact that available solutions can now be more described as ecosystems, which include and connect a growing number of devices, apps, and services to support diabetes patients and their caregivers. Mobile apps still are at the center of this ecosystem. However, current offerings today go far beyond the functionality offered within an app. To reflect this development, the title of this edition of the market report has been changed to Digital Diabetes Care Market Report.

The main aim of this report is to analyze the current status and size of the global digital diabetes care market, discuss and evaluate trends, identify top-10 countries and competitors, and provide an outlook for the future market developments.

The report pays special attention to the providers of digital diabetes services. It profiles in detail ten leading publishers in terms of their diabetes app portfolio, service offering, performance, and strategy.

The top ten countries are analyzed in terms of each country's specific addressable market size for diabetes apps and the main diabetes apps market KPIs for 2016-2017. Corresponding top app publishers are also identified in each country.

This analysis concentrates on digital solutions/ecosystems that focus on supporting patients and caregivers to manage diabetes. Other solutions that include people with diabetes as a secondary/additional target user group (e.g. a recipe app that labels certain dishes specifically for people with diabetes, but also offers other recipes), as well as general fitness or medical apps/solutions that can be used to support the treatment of people with diabetes but are not specifically designed for them (non-core diabetes), are excluded.

With regard to mobile applications, the report includes apps that run on iOS and Android operating systems and are listed in Apple App Store and Google Play.

This edition of the market report covers the time frame between 2008 and 2017 to illustrate both the current status and the history of the market. Based on actual market sizes and future trends, the report also gives a five-year forecast for the period from 2018 to 2022.

The current and future market (outlook) analysis is highlighting key market KPIs, including the following:

- The size of the **addressable market** for digital diabetes care solutions.
- Various metrics that show the size and development of the demand and supply side of the market: the number of **downloads, active users, apps, publishers**.
- A breakdown of current and future revenue streams from **digital content, connected devices, services (including coaching), bundles, technology licencing, and advertising and promotion**.

The report pays special attention to evaluating the trends that have shaped the industry over the last 2-3 years. It also gives guidance for what constitutes a state-of-the-art digital diabetes care solution as of today.

Digital Diabetes Care Market Report 2018

Research2Guidance is monitoring the digital diabetes care market since 2010. Our market models are constantly updated based on regular trend watch analysis, interviews, and databases.

9 APPENDIX

9.3 ABOUT RESEARCH2GUIDANCE

research2guidance is a strategy advisor and market research company. We concentrate on mobile app eco-systems and complex digital healthcare solutions. Our service offerings include:

App Strategy: We help our clients inside and outside of the mobile industry to develop their app market strategy. Our consulting advisory projects are based on a set of predefined project approaches including: App strategy development, App Evaluation, App Market Segment Sizing, App Governance and App Marketing Spend Effectiveness.

App Market Reports: Our app market reports explore major trends and developments affecting the app markets. Separate research papers provide both general and specific coverage of the market. The reports contain key insights for companies looking to enter or deepen their engagement with the mobile applications market, providing data and analysis on all relevant aspects of the market to ease investment decision-making.

App Market Surveys: We leverage our 70.000 app eco-system database to conduct surveys and reports for our clients.

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Oleksiy is a Senior Analyst at **research2guidance**. He has conducted several consulting projects on digital diabetes solutions and other healthcare conditions. Currently, he is responsible for all premium report products in the company. Prior to joining **research2guidance**, Oleksiy worked as a telecom and digital analyst at Ovum (United Kingdom). He has a vast international experience due to his involvement in various consulting projects in Germany, the United Kingdom, Russia, and other East European countries.

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