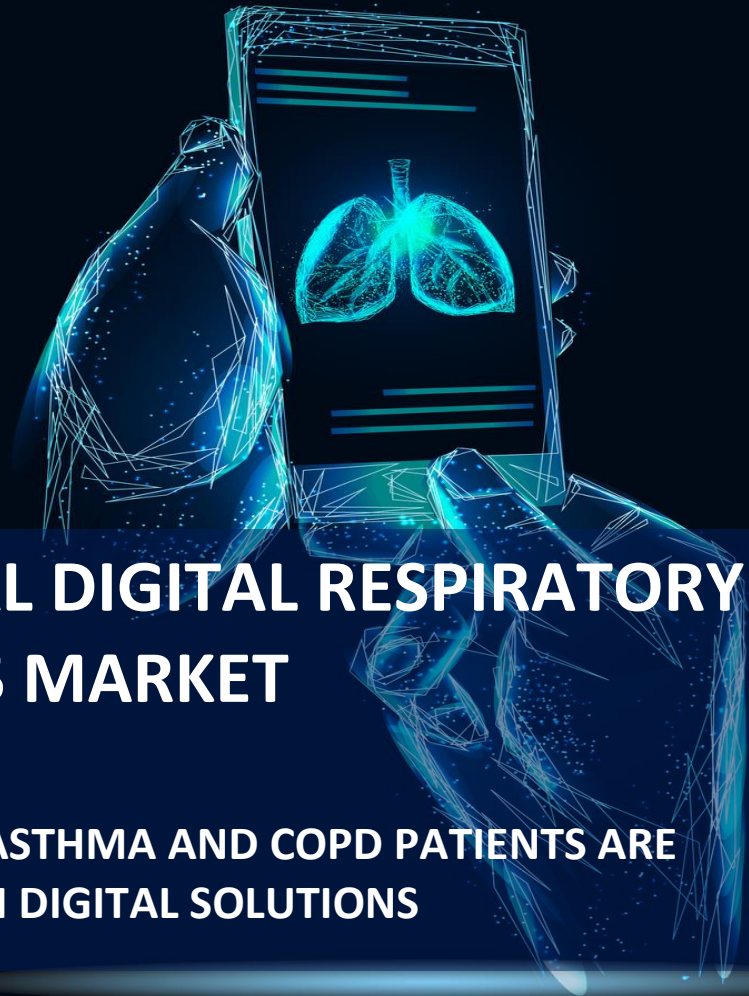




Research 2 Guidance



**THE GLOBAL DIGITAL RESPIRATORY
SOLUTIONS MARKET
2009-2023**
**HOW 500M+ OF ASTHMA AND COPD PATIENTS ARE
ADDRESSED WITH DIGITAL SOLUTIONS**

www.research2guidance.com

Positioning of key players, market size, top 10 countries,
market entry strategies, trends and outlook

January 21st, 2019

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Digital Respiratory Solutions Market Report 2019

WHAT THIS REPORT IS ABOUT

This report is a comprehensive **factbook** about **digital solutions that address patients affected by chronic lung diseases (such as asthma and COPD) and their caregivers**. It analyses in detail the **current status of the market**, looks at current trends and discusses how it will evolve in **the next five years**. Major attention is paid to demonstrating **service offerings and strategies of key players**.

Digital respiratory solutions comprise of connected devices (e.g. inhalers or spirometers), mobile applications, additional services (e.g. coaching or training), and HCP / caregivers portals.

This report evaluates **possible market entry options** based on a profound market deep dive, assessment of competitor strategies, and insights from other digital health market segments, such as diabetes and weight loss.

The size of the opportunity is enormous and potentially even bigger than the digital diabetes care market.

THE ADDRESSABLE TARGET GROUP IS ENORMOUS AND SET TO GROW

Out of **500M¹** asthma & COPD patients world-wide, **210M²** can be targeted with **digital respiratory solutions already today**.

THE MARKET IS 3-5 YEARS BEHIND OTHER DIGITAL HEALTH MARKETS, SUCH AS DIABETES, WEIGHT LOSS OR FITNESS

- There are **400+** digital respiratory solutions available worldwide.
- Usage of digital is still low: Solutions reach to <1% of the addressable target group.
- Current **business models** of digital respiratory solutions focus on **connected device sales**, mostly inhaler sensors and spirometers.

PHARMA, MED-TECH AND START-UP BUSINESSES ARE POSITIONING THEMSELVES TO BE READY WHEN THE MARKET TAKES OFF



Understand market entry strategies of key players in the digital respiratory ecosystem

No company has yet gained a dominant market position. Market shares still vary significantly from year to year. There is still room to enter!

¹ World Health Organization (WHO)

² Research2Guidance 2018

IN A NUTSHELL

- ✓ Full market study report
- ✓ Current status
- ✓ Classification of solutions and connected devices
- ✓ 5-year forecast 2019-2023
- ✓ Trends
- ✓ Business strategies
- ✓ Top 10 countries profiles
- ✓ Top 10 digital solution providers profiles
- ✓ Market size in 30 countries
- ✓ 122 pages
- ✓ 75 graphs
- ✓ Published January 2019
- ✓ 1st edition

About R2G

Research2Guidance is a strategy advisory and market research company. We support businesses in digital healthcare and ultimately improve the way healthcare services are delivered globally. We do this by providing market and competitor insights (research) and strategy advice (guidance). Since 2010, we have empowered digital health innovators and supported their missions for better healthcare.



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Digital Respiratory Solutions Market Report 2019

A DATA-BASED REPORT ABOUT THE DIGITAL RESPIRATORY OPPORTUNITY

Charts and illustrations highlight market insights, business strategies, trends and forecasts. The report is data driven. Each chapter is headed by a short summary to facilitate reading.



The market and business intelligence provided in the report creates a **comprehensive picture of the global digital respiratory market**. To demonstrate the gamut of **business models** and **strategic approaches** currently available in the digital respiratory market, ten profiles of leading companies are introduced. **Company profiles** show market performance, business model and perceived digital strategy. **Country profiles** help to identify market opportunities for business growth.

COMPANIES PROFILED



1. Propeller Health
2. Adherium
3. Cohero Health
4. MIR
5. NuvoAir
6. AsthmaMD
7. Kaia Health Software
8. Tactio Health
9. AstraZeneca
10. Novartis

COUNTRIES PROFILED



1. Germany
2. USA
3. UK
4. France
5. Australia
6. Canada
7. Malaysia
8. Switzerland
9. India
10. Austria

MARKET LEADER PROFILES

Service Offerings, Connected Devices, Performance, Strategy



COUNTRY PROFILE

Demographics, Downloads & Publishers



The questions the report answers



- ✓ What is offered in the market?
- ✓ What are the strategies of leading market players?
- ✓ How many downloads and users are there now and will be in the future?
- ✓ How big will the market be by 2023?
- ✓ What are the current and future main revenue sources?
- ✓ Which market entry strategies work best?
- ✓ Which countries offer the biggest market potentials?

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1 SCOPE OF THE REPORT

This report deals with the global market for digital respiratory solutions. A digital respiratory solution can consist of a connected device (such as an inhaler and/or a spirometer), an app, and additional services and web portals for healthcare professionals (HCPs), patients and/or caregivers.

The main goal of this report is to analyze the current status of the digital respiratory market. To achieve this, the study concentrates on sizing the global digital respiratory solutions market, analyzing the digital strategies of key players, discussing and evaluating trends, and providing an outlook for the future market developments. The report also categorizes and describes the main components of currently available digital respiratory solutions, including apps and connected devices.

The digital respiratory market is still at an emerging stage, with players positioning themselves to be ready when the market will take off. Therefore, the report pays special attention to analyzing top key players, their perceived strategies and digital respiratory offerings.

Similar to other digital chronic condition market segments, apps are more and more at the centre of solution ecosystems, allowing app users to track and display measurements and to share results with HCPs or caregivers. Therefore, the report analyzes in detail current and future app download and usage trends, including the apps that run on iOS and Android operating systems.

The market analysis is global but also provides details about the top-10 countries. They are analyzed in terms of each country's specific addressable market size for digital respiratory solutions and the main digital respiratory apps market KPIs for 2017-2018. Corresponding top app publishers are also identified in each country.

The market report covers the time frame between 2009 and 2018 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 2019 to 2023.

The analysis highlights key market KPIs, including the following:

- The size of the addressable market for digital respiratory 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 and publishers.
- The breakdown of current and future revenue streams from digital content, connected devices, services (including coaching), bundles, technology licensing, and advertising and promotion.

The report pays special attention to evaluating the trends that have shaped the industry over the last two to three years. It also gives guidance as to what is needed to create more value for patients and eventually establish daily use for digital respiratory solutions. Finally, three principle market entry strategies are discussed and evaluated.

Research2Guidance has been monitoring the digital health market since 2010. This report will act as a baseline for the future analysis of the digital respiratory solution market.

9 APPENDIX

9.3. ABOUT RESEARCH2GUIDANCE

“We believe that digital health innovations will have a significant impact on the life of every human being and they have already started transforming the healthcare industry. We support established healthcare companies and startups with insights, strategic advice, and hands on partnership building.”

R2G exists to support business in digital healthcare and ultimately improve the way healthcare services are delivered globally.

We do this by providing market and competitor insights (research) and strategy advice (guidance). We facilitate partnerships creation between best-in-class innovators and established healthcare companies and help them to align their service offerings and business models.

We strive for excellence in all we do. Our consultants are 100% dedicated to digital health.

Based in Berlin, we work on projects around the world. We support traditional healthcare companies, such as pharmaceutical, health insurance or med-tech companies, medical institutions, as well as startups and enterprises that want to enter the healthcare market by using digital enabled business models and solutions.

Our *mHealth Developer Economics* research program and panel are the largest of its kind across the global digital health industry. The research program tracks the current market status and examines the progression of trends since 2010. To give something back to the growing digital health business community, we share results of the research program in our yearly publications.

Since 2010, we have empowered digital health innovators and supported their missions for better healthcare.

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Ralf-Gordon Jahns

Ralf is the Managing Director and Co-founder of **Research2Guidance**. He has published more than 20 digital health market reports. Over the last eight years, Ralf has helped met-tech, pharmaceutical and health insurance companies to develop their digital health strategy. Prior to **research2guidance**, he was a partner and member of the leadership team of Capgemini Telecom Media & Networks. Ralf is a frequent keynote speaker at digital health events.

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