

A background image showing a hand holding a black smartphone in the foreground. In the background, there is a blurred view of a kitchen or grocery store with various fresh fruits and vegetables, including green grapes, green apples, and leafy greens. A yellow measuring tape is also visible in the lower-left corner of the image.

THE GLOBAL MOBILE WEIGHT LOSS MARKET 2020:

HOW DIGITAL SOLUTIONS TRANSFORM THE WEIGHT LOSS INDUSTRY AND CHRONIC CARE

www.research2guidance.com


Positioning of key players, Market Size (2018 to 2020), Top 10 Countries, Trends, the Impact of COVID-19 Crisis and the Post-pandemic Outlook until 2025

July 2020

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Global Mobile Weight Loss Market Report 2020

WHAT IS THIS REPORT ABOUT?

 This report is **the most comprehensive** account of mobile weight loss solutions and digital transformation in the weight loss industry, which is set to establish new services and open new revenue streams in the near-term future.

Mobile weight loss solutions are referred to mobile apps that assist people in their weight loss efforts by providing them with various content and services. In just a few years mobile weight loss apps revolutionized the weight loss market, as they brought weight loss programs and trackers to the most used and intimate digital screen – a smartphone.

The report analyzes in detail the **current market structure** (user demand, service offerings, market segments) and how companies are exploiting the market opportunity (competition levels, market shares, market leaders). **Market leaders are profiled**, with insights about their perceived strategies, service offers, and performance provided.

The report also evaluates **country market opportunities** and profiles top 10 country markets. It discusses **major trends** that will transform the digital weight loss industry in the medium-term. Apart from that, **the impact of the COVID-19** is also analyzed.

Mobile weight loss solutions have **proven to work** and already become a **substantial business in the end-user market** where customers are ready to pay for them out-of-pocket. **New opportunities are emerging in the reimbursement market** where mobile weight loss solutions are increasingly at the core of digital chronic care solutions.

WHY THIS MARKET?

- **Huge addressable market** of 1.5 billion people worldwide, which is still set to grow to 2 billion people by 2025. The report examines regional differences, showing adoption rates and usage numbers on a country level.
- **Multibillion US\$ market** with strong growth potential, as customers are willing to pay and payers are about to buy in. The report analyzes business models and service offerings that will ensure the growth.
- **Mobile weight loss solutions will be at the core of digital chronic care**, increasing the demand for digital weight loss competencies, assets, and solutions. The report shows how trailblazers have already implemented them.
- **Substantial investment opportunity**, as more than 4,000 companies are currently active in mobile weight loss market. The report analyzes top global players and local leaders.
- **The COVID-19 crisis is pushing acceptance of mobile weight loss solutions**. The report demonstrates how digitalization of weight loss has been accelerated by the current pandemic, with long-lasting impact.

IN A NUTSHELL

- ✓ Full market study report
- ✓ Market's current status
- ✓ Business models & revenues
- ✓ The COVID-19 crisis impact assessment
- ✓ The outlook to 2025
- ✓ Top 10 Trends
- ✓ Top 10 country profiles
- ✓ Top 10 company profiles
- ✓ 125 pages
- ✓ 61 figures & 30 tables
- ✓ Published in July 2020
- ✓ 1st edition

ABOUT R2G

Research2Guidance is a strategy advisory and market research company.

We support business in digital healthcare and ultimately improve the way healthcare services are delivered globally.

We provide 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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Global Mobile Weight Loss Market Report 2020

DATA-DRIVEN REPORT FULL OF METRICS, ANALYSIS, AND INSIGHTS

Graphics and illustrations highlight market insights, business model strategies, trends, and forecasts. It is a very data-driven report, with a high level of detail. To ease reading, each chapter is headed by a short summary.

DIGITAL SERVICES

Current offerings



MARKET STRUCTURE

Year 2018-2020



FORECAST

Years 2020-2025



TRENDS

Top 10



Profiles are used to describe top 10 countries and top 10 market players with their digital service offerings. Company profiles show market performance, business model and perceived digital strategy. Country profiles help to identify market opportunities for business growth.

COUNTRIES PROFILED



1. The United States
2. India
3. Russia
4. Brazil
5. The United Kingdom
6. Germany
7. France
8. Japan
9. Italy
10. Mexico

COMPANIES PROFILED



1. WW International
2. Noom
3. Under Armour
4. BetterMe
5. YAZIO
6. Lifesum
7. Verv
8. Livongo Health
9. Omada Health
10. Lark

COMPANY PROFILES

Service offerings, connected devices, performance, strategy



COUNTRY PROFILES

Demographics, Downloads & Publishers



Questions the report answers:



- ✓ What is the global potential for mobile weight loss solutions?
- ✓ What is the current status of the market?
- ✓ Who are the key market players and what are their perceived strategies?
- ✓ What is the impact of the COVID-19 crisis?
- ✓ How many downloads and users are there?
- ✓ How big will the market be by 2025?
- ✓ What are today's and future main revenue sources?
- ✓ What are key trends that are shaping the market's future?

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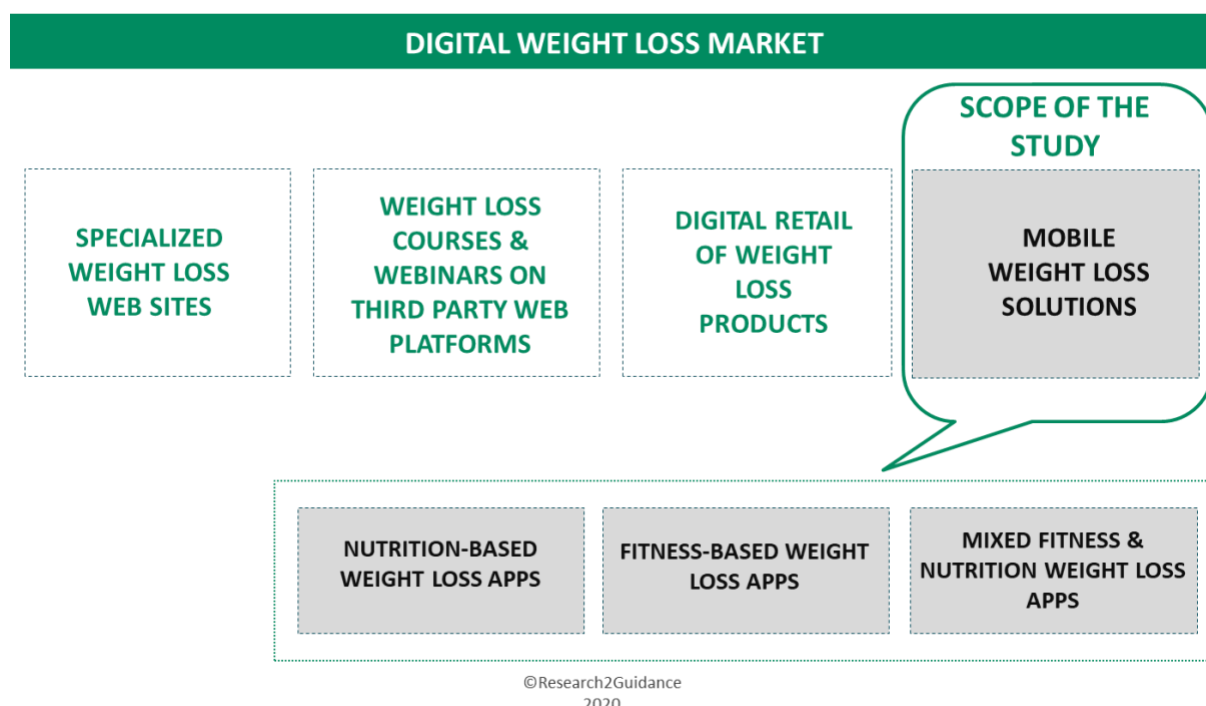
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Global Mobile Weight Loss Market Report 2020

1. SCOPE OF THE REPORT

This report deals with **mobile weight loss solutions**, i.e. mobile apps that assist people in their weight loss efforts by providing them with various content and services. **Mobile weight loss solutions** constitute a part of the broader **digital weight loss market**, which also includes specialized weight loss websites, courses and webinars on third-party web-platforms, and digital retail of weight loss products. Yet all the three other segments mentioned are beyond the scope of this report.

Figure 1: Mobile Weight Loss Market Solutions: Scope of the Study



There is a substantial number of reasons to focus on mobile weight loss solutions. The first mobile weight loss apps appeared at the very dawn of Apple's App Store back in 2008, followed by the Google Play store in 2010. Initially, their goal was to augment the existing on-site and digital web-based weight loss offerings. Yet within just a few years mobile weight loss apps revolutionized the weight loss market, as they brought weight loss programs and trackers to the most used and intimate digital screen – a smartphone.

Whilst other digital tools, largely delivered via desktops and laptops, were the first to facilitate the distanced delivery of weight loss services and products, it was smartphone apps that ensured a daily 'on-the-go' usage of weight loss services, truly personalizing them and enhancing their efficiency.

The use of mobile apps has proven to be efficient not only in comparison with on-site programs, but also with other digital tools such as web-based programs. As a result, the mobile screen is increasingly becoming the major channel in the overall digital weight loss market.

Global Mobile Weight Loss Market Report 2020

As this study has established, over 95% of currently incorporated providers of weight loss services (excluding individual coaches and fitness clubs) have apps to reach to their current and potential customers.

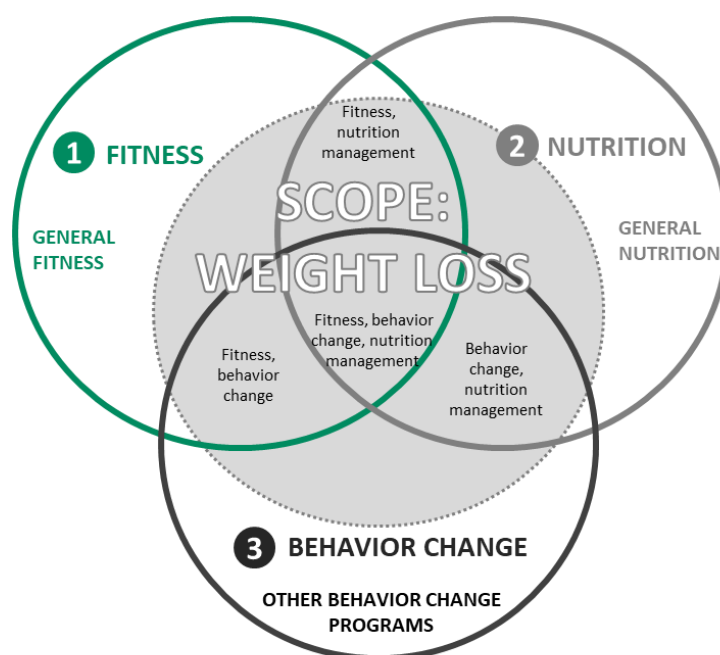
There are three key segments in the market of the mobile weight loss solutions, namely:

- **Nutrition-based weight loss apps:** Mobile solutions that facilitate weight loss by offering various diet regimes (for example, Keto diet, FODMAP diet, Atkins diet, etc.) and/or nutrition management tools, such as food consumption trackers, calorie counters, food banks, etc.
- **Fitness-based weight loss apps:** Mobile solutions facilitating weight loss with the aid of exercise programs, such as special workouts, and/or fitness management tools, such as exercise tracking.
- **Mixed nutrition and fitness weight loss apps:** Mobile solutions that combine both nutrition and exercise-based approaches to weight loss by incorporating appropriate nutrition management and fitness management tools.

Although many fitness and/or nutrition apps can help their users lose weight, not all of them can qualify for the definition of mobile weight loss solutions. As such this analysis concentrates on **core weight loss applications** whose primary purpose is weight loss. At the same time, it excludes **non-core general fitness and nutrition applications**, which can provide users with some limited assistance in their weight loss efforts, yet are designed for more general purposes (such as various fitness trackers, general wellness diet programs, etc.).

This report focuses on *iOS* and *Android* platforms, leaving other marginal app stores out of the scope of our analysis.

Figure 2: Mobile Weight Loss Market Solutions: Narrowing the Scope



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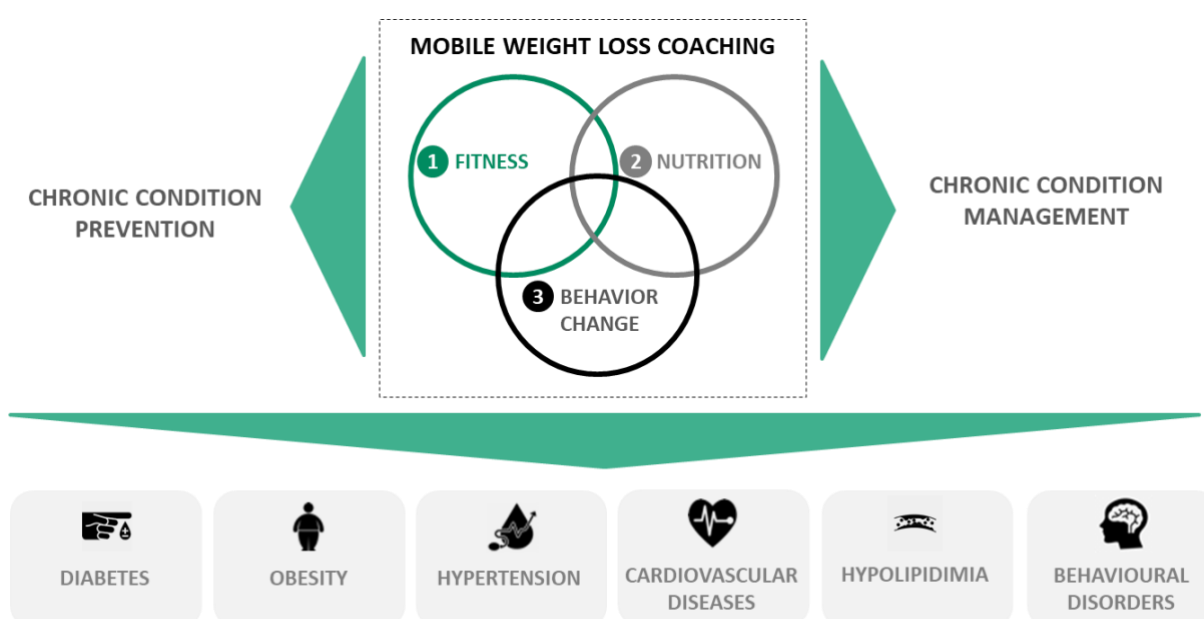
Global Mobile Weight Loss Market Report 2020

Physical **fitness** and balanced **nutrition** have become key components of contemporary weight loss programs. Yet quite often they prove to work only as a quick fix, without ensuring a long-lasting impact. As a result, there is an increasing importance in integrating the **behavior change** support as the third component of efficient weight loss programs.

In the context of weight loss, the behavior change approach helps establish long-term exercise and nutrition patterns to avoid reverse trends. This report shows how structured and personalized weight loss behavior change programs are currently altering the mobile weight loss market, establishing the long-term development path.

Due to the diversity within the mobile weight loss market, the report pays special attention to the market's structure, exploring its three major market segments: (1) Nutrition, (2) Fitness, and (3) Combined weight loss solutions. It also analyzes the top players, their perceived strategies, and their mobile weight loss offerings. The market analysis has a global span, with detailed Top 10 country market profiles also provided.

Figure 3: Mobile Weight Loss Solutions for Chronic Condition Prevention and Chronic Condition Management



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This report pays particular attention to the growing importance of mobile weight loss coach-driven programs in **digital chronic care**. Structured curriculum-based coaching programs, which target excessive weight and obesity, are becoming standard in digital chronic care. They are increasingly used by vertical chronic care management companies – **Omada Health**, **Livongo Health**, and **Dario Health** to name a few – to target various chronic conditions, including diabetes, hypertension, cardiovascular diseases, hyperlipidemia, etc.

What is more important, chronic care management companies promote their weight loss programs in the payer market, making mobile weight loss solutions increasingly more attractive for insurance companies and self-insured employers, especially in the United States

Global Mobile Weight Loss Market Report 2020

(U.S.) and the United Kingdom (U.K.). While being one of the most interesting findings of this study, the targeting of multiple chronic conditions with weight loss programs is widely analyzed in the report.

The report covers the time horizon from 2010 to 2025 to illustrate both the current status and the history of the market. It pays a particular attention to the impact of **the COVID-19 crisis**, which has both disrupted and boosted the mobile weight loss industry.

Along with the analysis of the short- and medium-term implications of the crisis, the report provides interim market development results, which show the increasing use of weight loss applications globally, as the quarantined population is looking for ways to adapt to the lockdown challenges.

Based on market size and future trends, the report also gives a five-year forecast for the period to 2024 inclusive and further identifies the most successful strategies for adjusting to the volatile business environment and new consumer behavior patterns.

The analysis highlights the market's Key Performance Indicators (KPIs), including the following:

- The size of the addressable market for the mobile weight loss solutions.
- Various metrics, showing the size and development of the demand and supply sides of the market, such as the number of downloads, active users, apps and publishers.
- The breakdown of current and future revenue streams from digital content, services (including coaching), technology licensing, advertising and promotion, etc.

Research2Guidance has been monitoring the digital health market since 2010. This report will act as a baseline for future analysis of the global market for mobile weight loss solutions.

11. APPENDIX

11.1. 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 start-ups with insights, strategic advice, and hands-on partnership building.”

R2G exists to support 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 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 start-ups and enterprises that want to enter the healthcare market by using digitally enabled business models and solutions.

Our *mHealth Developer Economics* research program and panel are the largest of their 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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