

# Digital Therapeutics Market - A Global and Regional Analysis: Focus on Product Type, Application, Sales Channel, and Country - Analysis and Forecast, 2023-2033

<https://marketpublishers.com/r/DDE678867A02EN.html>

Date: December 2023

Pages: 156

Price: US\$ 4,950.00 (Single User License)

ID: DDE678867A02EN

## Abstracts

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The global digital therapeutics market is projected to reach \$46.80 billion by 2033 from \$4.90 billion in 2022, growing at a CAGR of 22.93% during the forecast period 2023-2033. The key factors driving the growth of the global digital therapeutics market include the multiple benefits offered by digital therapeutics over traditional treatment, continuous technological advancements in the field, and increasing demand for cost-effective solutions.

### Market Introduction

The global digital therapeutics market consists of evidence-based and clinically evaluated software and devices. These tools are designed for the treatment of diverse diseases and disorders.

Additionally, digital therapeutics can be employed either independently or in conjunction with devices to address both physical and behavioral health conditions.

### Impact Analysis:

The digital therapeutics market has made an impact in the following ways:

**Increased Accessibility of Care:** Digital therapeutics offer convenient and accessible

care options for patients, particularly those living in remote areas or facing mobility limitations. This expanded access is improving health outcomes and reducing disparities in healthcare delivery.

**Improved Patient Engagement and Adherence:** Digital therapeutics can personalize interventions and provide patients with real-time feedback and support, leading to higher engagement and adherence to treatment plans. This ultimately translates to better health outcomes and reduced healthcare costs.

**Enhanced Data Collection and Analysis:** Digital therapeutics enable continuous data collection about patients' health and behavior, providing valuable insights for healthcare providers and researchers, helping them to deliver personalized treatment strategies, and contributing to the development of new solutions.

**Reduced Costs of Healthcare Delivery:** By enabling early intervention and self-management of chronic conditions, digital therapeutics is potentially reducing dependence on traditional healthcare services, leading to cost savings for both patients and healthcare systems.

Market Segmentation:

Segmentation 1: by Product Type

Software

Devices

The software segment held the highest share in the global digital therapeutics market (by product type) in 2022 and is anticipated to hold its dominance till the end of the forecast period.

Segmentation 2: by Application

Treatment/Patient Care-Related Applications

Preventive Applications

The treatment/patient care-related applications segment held the highest share in the global digital therapeutics market (by application) in 2022 and is anticipated to hold its dominance till the end of the forecast period.

### Segmentation 3: by Sales Channel

Business-to-Business

Business-to-Customer

The business-to-business segment held the highest share in the global digital therapeutics market (by sales channel) in 2022 and is anticipated to hold its dominance till the end of the forecast period.

### Segmentation 4: by Region

North America - U.S., Canada

Europe - U.K., Germany, France, Italy, Spain, and Rest-of-Europe

Asia-Pacific - China, Japan, India, South Korea, Australia, and Rest-of-Asia-Pacific

Latin America - Brazil, Mexico, and Rest-of-Latin America

Middle East and Africa - K.S.A., U.A.E., Israel, South Africa, and Rest-of-Middle East and Africa

\*All the regions include a detailed analysis based on product type, application, and sales channel.

China dominated the Asia-Pacific digital therapeutics market in 2022. The country has a growing population with chronic conditions such as diabetes, hypertension, and cardiovascular diseases. Digital therapeutics offers effective and accessible management solutions for these conditions.

The Chinese government recognizes the potential of digital therapeutics and is actively

promoting its development and adoption.

## Recent Developments in the Digital Therapeutics Market

In November 2023, Vida Health partnered with Capital Rx to introduce Rx Activate, a high-touch chronic condition management program.

In November 2023, Vida Health collaborated with Withings Health Solutions to enhance virtual cardiometabolic care by integrating powerful health monitors.

In September 2023, Click Therapeutics, Inc. announced a collaboration with Indivior to jointly develop and commercialize innovative prescription digital therapeutics for substance use disorders.

In July 2023, ResMed Inc. completed the acquisition of Somnoware, a leading provider of digital sleep and respiratory care diagnostics software.

In April 2023, Glooko, Inc. partnered with Hedia, integrating Hedia's technology into Glooko's diabetes management platforms. This collaboration aims to offer an interoperable solution, combining connected care, remote patient monitoring, and digital therapeutic technologies to improve access for individuals with Type 1 and Type 2 diabetes in need of bolus insulin dosing advice.

In February 2023, Glooko, Inc. announced a global collaboration with Sanofi to enhance support for individuals with diabetes and healthcare professionals by integrating SoloSmart with the Glooko platform.

In January 2023, Omada Health Inc. collaborated with Intermountain Healthcare and Castell to establish an integrated virtual care option for diabetes management and prevention.

## Demand – Drivers and Limitations

### Market Demand Drivers:

**Multiple Benefits Provided by Digital Therapeutics over Traditional Treatment:** The adoption of digital therapeutics is surging due to their personalized, technology-driven approach to managing various conditions. Unlike traditional methods, they offer real-

time monitoring, data collection, and tailored interventions, addressing individual needs. This paradigm shift positions them as a promising growth area, heralding a new era of patient-centric healthcare.

**Continuous Technological Advancements Driving the Adoption of Digital Therapeutics:** Digital therapeutics is rising, fueled by technology and widespread smartphones. This synergy creates user-friendly solutions poised to revolutionize healthcare and patient outcomes. AI personalizes and adapts interventions, while big data empowers healthcare professionals with insights for better care. Mobile health platforms democratize access, while real-time monitoring ensures continuous care. The future of digital therapeutics is bright, with the potential to revolutionize healthcare and improve global health outcomes.

**Increasing Demand for Cost-Effective Solutions Creating a Demand for Digital Therapeutics:** As healthcare costs are increasing, digital therapeutics rise as a cost-effective alternative. By leveraging technology for personalized care and monitoring, they reduce costly hospitalizations and in-person visits. This saves money and improves outcomes, making healthcare more accessible and sustainable, especially for underserved populations. The future is bright for digital therapeutics, poised to transform healthcare and improve global health.

#### Market Restraints:

**Data Privacy and Security Concerns:** Digital therapeutics promise a healthcare revolution; however, ethical concerns regarding data privacy, algorithmic bias, and transparency cloud their potential. Furthermore, vast data collection raises privacy fears, while algorithms risk perpetuating biases. To ensure responsible innovation, robust regulations for data privacy, algorithmic fairness, and transparency must be established through collaborative efforts between policymakers, healthcare providers, and tech companies. Only then can digital therapeutics' transformative potential be realized while safeguarding patient well-being.

**Lack of Standardized Reimbursement Models:** The lack of standardized reimbursement disrupts the adoption of these innovative solutions by both healthcare providers and patients. Standardized reimbursement models are crucial to make digital therapeutics accessible to those who need them most. Collaboration among stakeholders is key to overcoming this hurdle and unlocking the transformative potential of digital therapeutics, paving the way for improved healthcare delivery and patient outcomes.

## Market Opportunities:

**Expanding Applications of Digital Therapeutics:** The applications of digital therapeutics are expanding beyond their initial focus, now addressing pain management, addiction, and rehabilitation, among other applications. This expansion is fueled by the recognition of their effectiveness in addressing a wider range of health challenges. Therefore, the expansion of digital therapeutics into new areas is poised to revolutionize healthcare delivery, improve patient outcomes for a wider range of conditions, and empower individuals to manage their health for a better life.

**Rising Fundings and Investment in Digital Therapeutics:** The digital therapeutics market is experiencing an investment boom, propelling its growth and paving the way for healthcare advancements. This influx of capital stems from the recognition of digital therapeutics' potential to revolutionize disease management, improve patient outcomes, and enhance healthcare efficiency. As investments continue to pour in, digital therapeutics are poised to transform disease management, improve patient outcomes, and enhance healthcare efficiency, shaping the future of healthcare delivery worldwide.

How does Digital Therapeutic Report provide value to this organization

**Product/Innovation Strategy:** The global digital therapeutics market has been extensively segmented based on various categories, such as product type, application, sales channel, and region. All the regions include a detailed analysis based on product type, application, and sales channel. This can help readers get a clear overview of which segments account for the largest share and which ones are well-positioned to grow in the coming years.

**Growth/Marketing Strategy:** Synergistic activities accounted for the maximum number of key developments, i.e., nearly 64.44% of the total developments in the global digital therapeutics market were between January 2020 and November 2023.

**Competitive Strategy:** The global digital therapeutics market has numerous established players with product portfolios that address an extensive range of conditions. Key players in the global digital therapeutics market analyzed and profiled in the study involve established players offering various digital solutions for treatment/patient care-related and preventive applications.

## Methodology

## Key Considerations and Assumptions in Market Engineering and Validation

Detailed secondary research was performed to ensure maximum coverage of manufacturers/suppliers operational in a country.

Exact revenue information, up to a certain extent, was extracted for each company from secondary sources and databases. The revenues specific to the product type/application/sales channel were then estimated for each market player based on fact-based proxy indicators as well as primary inputs.

The scope of this report has been carefully derived based on interactions with experts in different companies across the world. This report provides a market study of digital therapeutics.

The market contribution of the digital therapeutics anticipated to be launched in the future has been calculated based on historical analysis. This analysis has been supported by proxy factors such as the innovation scale of the companies, the status of funding, collaborations, customer base, and patent scenario.

The scope of availability of digital therapeutics in a particular region has been assessed based on a comprehensive analysis of companies' prospects, regional end-user perception, and other factors impacting the launch of digital therapeutics in that region.

The base year considered for the calculation of the market size is 2022. A historical year analysis has been done for the period FY2020-FY2021. The market size has been estimated for FY2022 and projected for the period FY2023-FY2033.

Revenues of the companies have been referenced from their annual reports for FY2020- FY2022. For private companies, revenues have been estimated based on factors such as inputs obtained from primary research, funding history, product approval status, market collaborations, and operational history.

Regional distribution of the market revenue has been estimated based on the companies in each region and the adoption rate of digital therapeutics. All the numbers have been adjusted to a single digit after the decimal for better presentation in the report. However, the real figures have been utilized for compound annual growth rate (CAGR) estimation. The CAGR has been



calculated for the period 2023-2033.

The market has been mapped based on the available digital therapeutics. All the key companies with significant offerings in this field have been considered and profiled in this report.

Market strategies and developments of key players have been considered for the calculation of the potential of the market in the forecast period.

### Primary Research:

The primary sources involve industry experts in the digital therapeutics market, including the market players offering digital therapeutics solutions. Resources such as CXOs, vice presidents, product managers, directors, territory managers, and business development have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from the primary sources include:

Validation and triangulation of all the numbers and graphs

Validation of the report's segmentation and key qualitative findings for digital therapeutics

Understanding the competitive landscape and business model

Current and proposed production values of a product by market players

Validation of the numbers of the different segments of the market in focus

Percentage split of individual markets for regional analysis

### Secondary Research

### Open Sources

Digital Therapeutics Alliance (DTA), Frontiers, World Health Organization



(WHO), and National Center for Biotechnology Information (NCBI), among others

Annual reports, SEC filings, and investor presentations of the leading market players

Company websites and detailed study of their portfolios

Gold standard magazines, journals, whitepapers, press releases, and news articles

Databases

The key data points taken from the secondary sources include:

Segmentation and percentage share estimates

Company and country understanding, and data for market value estimation

Key industry/market trends

Developments among top players

Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

Quantitative data for mathematical and statistical calculations

### Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Some prominent names in the global digital therapeutics market include:

Akili Interactive Labs, Inc.

Lark Technologies, Inc.

2Morrow Inc.

Click Therapeutics, Inc.

Biofourmis Inc.

Glooko, Inc.

CureApp, Inc.

Cognoa, Inc.

Omada Health, Inc.

Cara Care

Neurotrack Technologies, Inc.

Kaia Health

ResMed Inc.

Vida Health

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