

Digital Therapeutics (DTx) Market by Offerings (Platform, Virtual Reality/Games), Revenue Model (Subscription, Value Based), Application (Therapy (Diabetes, Obesity, CNS, Respiratory, CVD), Drug Adherence, Rehab/Patient care) - Global Forecast to 2028

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Abstracts

The digital therapeutics market is projected to reach USD 21.9 billion by 2028 from USD 6.1 billion in 2023, at a CAGR of 29.1% during the forecast period. The rapid adoption of digital therapeutics is driven by factors such as the increasing number of patients grappling with chronic diseases and escalating investments in this sector. Nonetheless, impediments to market growth include a lack of awareness and access to digital therapeutics programs in developing nations, resistance from traditional healthcare providers, and the existence of uneven payment models.

“The subscription-based revenue model segment represents the largest and fastest-growing category in the market over the forecast period.”

The revenue model segment the digital therapeutics market is categorized into subscription, one-time purchase/licensing, and outcome/value based. In 2022, the subscription segment held the largest market share. Digital therapeutics often aim for long-term health outcomes, requiring users to commit to the program over an extended period. Subscription models encourage user commitment by offering incentives and continuous access to the platform's features.

“Diabetes segment is expected to grow at the highest rate during the forecast period.”

Concerning the type of treatment/care-related application, the digital therapeutics market is categorized into diabetes, CNS disorders, chronic respiratory diseases, musculoskeletal disorders, cardiovascular diseases, smoking cessation, medication adherence, gastrointestinal disorders, substance use disorders & addiction management, rehabilitation & patient care, and other treatment/care-related applications.

Within the category of treatment/care-related applications, the diabetes segment is poised to register the highest growth rate during the forecast period. The market for digital therapeutics in diabetes accounted for the largest share in 2022. The driving factors include the increasing prevalence of diabetes, the significant healthcare costs associated with the condition, and rising government initiatives focused on alleviating the burden through cost-effective solutions.

“The B2B segment is expected to grow with the highest CAGR during the forecast period.”

With respect to the sales channel, the digital therapeutics market is segmented into business-to-customer (B2C) and business-to-business (B2B). The B2B segment is anticipated to exhibit the highest CAGR during the forecast period, attributed to the growing partnerships of pharmaceutical companies with digital health companies to integrate digital therapeutics with their drug products. Pharmaceutical companies are actively engaging in strategic partnerships and acquisitions with digital therapeutics providers. These collaborations allow pharmaceutical companies to integrate digital therapeutics into their broader healthcare solutions, offering a holistic approach to patient care. Additionally, payers, including insurance companies and healthcare providers, are increasingly embracing value-based care models. Digital therapeutics align with these models by emphasizing outcomes, prevention, and cost-effectiveness. Payers see the potential of DTx in reducing healthcare costs through preventive interventions, ultimately driving adoption.

“North America to be the largest and the fastest-growing regional market.”

North America, comprising of the US and Canada, held the lion's share for digital therapeutics market in 2022. Factors such as the government schemes to fund technological advancements progresses combined with the favorable reimbursement structure for digital therapeutics are projected to drive market growth in this region. Additionally, payers and healthcare providers in North America have been early adopters of digital therapeutics. The region has witnessed a proactive approach from

insurance companies, healthcare providers, and other stakeholders in recognizing the clinical and cost-effectiveness of DTx. This early buy-in has driven widespread adoption across different healthcare settings.

The primary interviews conducted for this report can be categorized as follows:

By Company Type: Tier 1 (50%), Tier 2 (30%), and Tier 3 (20%)

By Designation: C-level (75%), D-level (15%), and Others (10%)

By Region: North America (70%), Europe (20%), APAC (7%), and the RoW (3%)

Key Players in the Digital Therapeutics Market

The prominent players in this market are Noom, Inc (US), Teladoc Health, Inc. (US), Omada Health, Inc. (US), WellDoc, Inc (US), Biofourmis (US), Better Therapeutics, Inc. (US), Amalgm Rx (US), CogniFit Inc (US), Headspace Health (US), Propeller Health (US), Virta Health Corp (US), 2Morrow, Inc. (US), Realizedcare (US), Canary Health (US), Twill Inc. (US), Click Therapeutics, Inc. (US), Akili, Inc. (US), Cognoa, Inc (US), Wellthy Therapeutics Pvt. Ltd. (India), Kaia Health (Germany), Ayogo (Canada), Mindable Health GmbH (Germany), Hinge Health, Inc. (US), and Freespira (US).

Research Coverage:

This report includes qualitative and quantitative analysis of the digital therapeutics market. The key objectives of the report are to estimate the size and future growth potential of the market across different segments, which includes sales channel, revenue model, application, offering and region. The report also comprises of extensive competitive analysis of the prominent market players, along with their financial information, recent developments, company profiles, recent developments, and prevalent market strategies.

Key Benefits of Buying the Report:

The report aims to assist market leaders and new entrants by offering close approximations of revenue figures for both the overall digital therapeutics market and its subsegments. Stakeholders can leverage this report to comprehend the competitive

landscape, acquire insights for strategic business positioning, and formulate effective go-to-market strategies. Additionally, it provides stakeholders with the means to assess the market dynamics and furnishes information on crucial market opportunities, restraints, drivers, and challenges.

Reasons to Buy the Report

This report will enrich established firms as well as new entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them garner a greater share of the market. Firms purchasing the report could use one or a combination of the below-mentioned strategies to strengthen their positions in the market.

This report provides insights on:

Analysis of key drivers (increasing incidence of preventable chronic disease, rising focus on preventative healthcare, need to control healthcare costs, significant increase in venture capital investments), opportunities (growth prospects in emerging markets, large undiagnosed and untreated patient population, unexpected therapeutic applications) are influencing the growth of the digital therapeutics market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the digital therapeutics market.

Market Development: Comprehensive information detailing lucrative market – the report analyses the digital therapeutics market across various regions as well as countries.

Market Diversification: Exhaustive information about new software and programs, untapped geographies, recent developments, and investments in the digital therapeutics market.

Competitive Assessment: The report provides detailed insights on key players as well as key SME/upcoming players in the market. In-depth assessment of growth strategies, market shares, product and service offerings of players and key trends in the market is provided in the report. The report will enable stakeholders to understand the pulse of the digital therapeutics market and provide them with information such as drivers, challenges, restraints and

opportunities.

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Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, MnM view (Key strengths/Right to win, Strategic choices made, Weakness/competitive threats) might not be captured in case of unlisted companies.

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