

Digital Therapeutics Market Report by Application (Diabetes, Obesity, CVD, CNS Disease, Respiratory Diseases, Smoking Cessation, and Others), End Use (Patients, Providers, Payers, Employers, and Others), and Region 2025-2033

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Report description:

The global digital therapeutics market size reached USD 7.1 Billion in 2024. Looking forward, IMARC Group expects the market to reach USD 28.7 Billion by 2033, exhibiting a growth rate (CAGR) of 16.8% during 2025-2033. North America is the dominant region in the market because it has an established healthcare infrastructure, strong technology advancements, and high investment in digital health in the region. Moreover, the market is expanding due to rising healthcare expenditure, increasing prevalence of chronic diseases, the growing geriatric population, and technological advancements offering easily accessible, cost-effective, personalized medical treatments.

Digital Therapeutics Market Trends:

Technological Developments in Healthcare

The market for digital therapeutics is growing at a rapid pace because of the relentless progress in technology, especially in mobile applications, artificial intelligence (AI), and machine learning (ML). These advancements are facilitating the creation of advanced digital platforms that are capable of providing customized treatment plans, processing large volumes of health data, and tracking patient activity in real-time. Algorithms based on AI are enhancing diagnostic capabilities, enabling early diagnosis of disease and more targeted interventions. Additionally, the development of wearable technology, which complements different physiological measures, such as blood pressure, heart rate, and blood glucose levels, is facilitating patients and healthcare workers to be proactive in disease management. The integration of these technologies into healthcare systems is enhancing patient outcomes and eliminating the necessity for in-person consultations, making treatment more convenient and effective. IMARC Group predicts that the global artificial intelligence in healthcare market is projected to reach USD 68.7 Billion by 2033.

Rising Incidence of Chronic Diseases

The rising occurrence of chronic diseases is one of the primary drivers of market. Chronic diseases like diabetes, obesity,

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cardiovascular diseases, and respiratory ailments are becoming prevalent globally, largely because of reasons such as aging populations, a lack of physical activity, and unhealthy diets. Digital therapeutics provide a solution for long-term condition management by offering real-time monitoring and tailored interventions. For instance, diabetic patients can use digital platforms to monitor their blood glucose levels, modify their insulin dosage, and get diet suggestions based on real-time feedback. Likewise, heart disease patients can utilize digital therapeutics to track vital signs, get notifications for out-of-range results, and follow prescribed treatment protocols. These technologies allow for patients to better control their conditions, minimizing the need for repeated trips to the hospital and enhancing their overall quality of life. In 2024, Click Therapeutics, Inc., a frontrunner in Digital Therapeutics as prescription medical solutions, revealed intentions to expedite its development efforts in obesity and cardiometabolic conditions through purchasing the assets of Better Therapeutics, Inc. The acquired assets comprise AspyreRx (BT-001), the inaugural FDA-authorized prescription digital intervention for type 2 diabetes, and BT-004, which recently received FDA Breakthrough Device Designation for addressing metabolic dysfunction-associated steatohepatitis (MASH).

Increased Demand for Personalized Healthcare

As per digital therapeutics market report, personalized healthcare is emerging as the central focus in medicine. Increasingly, patients expect therapies that are customized to their own requirements, including considerations such as genetics, lifestyle, and particular health status. Digital therapeutics allow clinicians to provide more personalized therapies by employing real-time information to customize treatment plans. The platforms can draw on data from wearable devices, health histories, and self-reported information to generate extremely personalized treatment plans. For instance, psychological apps utilize information regarding a patient's mood, sleep, and behavior to modify therapeutic treatments such as cognitive behavioral therapy (CBT). Likewise, chronic condition digital therapeutics are capable of tracking disease advancement and modifying treatments based on the information. Personalized healthcare is revolutionizing healthcare by enabling patients to actively manage their condition, enhancing both treatment efficacy and participation. With the need for personalized therapies increasing, digital therapeutics are becoming integral parts of personalized treatments. In 2024, Merz Therapeutics introduces iFlexo, a tailored digital solution designed to improve rehabilitation for individuals experiencing post-stroke spasticity, reflecting its continuous dedication to assisting stroke survivors. The application, created in partnership with S3 Connected Health, offers specific exercises and rehabilitation plans designed to enhance mobility for individuals experiencing mild to moderate spasticity. Through providing structured exercises, iFlexo seeks to assist stroke survivors in reclaiming their independence and enhancing their overall life quality. Merz Therapeutics is the sole pharmaceutical company specializing in neurotoxins that provides a platform for self-rehabilitation support.

Digital Therapeutics Market Growth Drivers:

Regulatory Support and Healthcare Reimbursement

One of the key drivers behind the digital therapeutics industry is the growing regulatory support and creation of reimbursement mechanisms for these platforms. Regulators such as the U.S. Food and Drug Administration (FDA) are actively engaging in the verification of digital therapeutics as proper medical interventions. The FDA has established new guidelines for the approval of software-based treatments, which is streamlining the process for digital therapeutics companies to take their products to market. This regulatory approval ensures that digital therapeutics are safe and effective, thus gaining more acceptance from healthcare providers and patients. Moreover, reimbursement policies are evolving to accommodate digital therapeutics, with more insurance companies recognizing the value of these solutions in improving patient outcomes and reducing healthcare costs. As reimbursement for digital therapies becomes more widespread, the financial accessibility of these solutions is improving, allowing more patients to benefit from them. This regulatory and reimbursement progress is paving the way for the broader adoption of digital therapeutics in mainstream healthcare.

Greater Emphasis on Mental Health

The increasing recognition of mental health disorders is supporting the market growth. Mental health disorders like anxiety, depression, and post-traumatic stress disorder (PTSD) are rising in frequency, and there is a growing need for effective, affordable treatments. Digital therapeutics are opening up new possibilities for treating mental health disorders by presenting scalable, easy-to-deliver solutions that can be delivered from home. Mobile apps, online therapy websites, and computerized cognitive behavioral therapy (CBT) programs are becoming increasingly popular as they provide patients with an option to standard

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in-office therapy. These options are especially useful for those who live in rural or underdeveloped areas, where access to mental health professionals is limited. In addition, online mental health websites offer a level of anonymity that can decrease the stigma of seeking help.

Consumer Preference for Convenience and Remote Healthcare

The preferences for convenient, remote healthcare products and services is bolstering the market growth. Today's patients increasingly want healthcare solutions that are integrated into their active lifestyle, so they can take care of themselves without having to pay repeated visits to clinics or hospitals. Digital therapeutics are addressing this need by offering tools that are available whenever and wherever needed, helping patients to control their health at their own pace. For instance, individuals suffering from chronic diseases can monitor their symptoms, monitor their vital signs, and receive treatment advice using mobile applications and wearable technology. Furthermore, digital platforms also facilitate remote consultations with medical professionals, curbing the necessity of travel and lowering healthcare expenses.

Digital Therapeutics Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2025-2033. Our report has categorized the market based on application and end use.

Breakup by Application:

?□Diabetes

?□Obesity

?□CVD

?□CNS Disease

?□Respiratory Diseases

?□Smoking Cessation

?□Others

Diabetes accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the application. This includes diabetes, obesity, CVD, CNS disease, respiratory diseases, smoking cessation, and others. According to the report, diabetes represented the largest segment.

Diabetes holds the largest market share as it is a condition that affects millions globally. Additionally, digital therapeutics in this area leverage cutting-edge technology to monitor blood sugar levels, administer insulin doses, and provide personalized dietary and exercise recommendations. These tools aim to stabilize patient conditions and enhance the quality of life by making disease management more accessible and efficient. Hence, leading market players are introducing advanced product variants to meet these needs. For instance, on 16 October 2023, Better Therapeutics, Inc., a prominent leader in prescription digital therapeutics (PDTs) for cardiometabolic conditions, announced the commercial release of AspyreRx. This is the first cognitive behavioral therapy (CBT) app to gain U.S. Food and Drug Administration (FDA) approval as a Class II device for managing type 2 diabetes (T2D) in adults. It allows healthcare providers to prescribe AspyreRx, which is accessible for download from the Apple App Store and Google Play Store.

Breakup by End Use:

?□Patients

?□Providers

?□Payers

?□Employers

?□Others

Patients holds the largest share of the industry

A detailed breakup and analysis of the market based on the end use have also been provided in the report. This includes patients, providers, payers, employers, and others. According to the report, patients accounted for the largest market share.

According to the digital therapeutics industry overview, patients represent the largest segment due to the increasing patient-centric healthcare approach and the widespread adoption of smartphones and internet services, which facilitate easy

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access to therapeutic applications. These digital solutions offer patients tailored treatments for a range of conditions, including chronic diseases such as diabetes and hypertension, as well as mental health disorders. Additionally, the convenience and efficacy of these applications in managing health conditions through personalized care plans and real-time health tracking significantly contribute to their adoption among patients. This trend is further supported by growing healthcare digitization and a shift toward preventive healthcare measures, reinforcing the dominant position of patients in the digital therapeutics market. Therefore, major players are collaborating and launching sophisticated product variations. For instance, on 5 July 2023, ResMed announced the acquisition of Somnoware, a leading provider of digital diagnostics software for sleep and respiratory care. This acquisition expanded ResMed's sleep management software capabilities, facilitating more efficient patient diagnosis and long-term treatment through enhanced sleep labs and physician tools. The Somnoware platform will complement ResMed's existing post-testing solutions, AirView and Brightree, and will continue to operate as an open platform. This openness allows sleep labs, pulmonary function testing facilities, and physicians to access results from various testing solutions, accelerating the process of getting diagnosed patients the treatment they need.

Breakup by Region:

? North America

o United States

o Canada

? Asia-Pacific

o China

o Japan

o India

o South Korea

o Australia

o Indonesia

o Others

? Europe

o Germany

o France

o United Kingdom

o Italy

o Spain

o Russia

o Others

? Latin America

o Brazil

o Mexico

o Others

? Middle East and Africa

North America leads the market, accounting for the largest digital therapeutics market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America was the largest regional market for digital therapeutics.

North America represents the leading region in the market. The digital therapeutics market growth factors for the region include the well-established healthcare infrastructure, robust technological advancements, and significant investment in digital health across the region. Moreover, the United States is primarily driven by the widespread adoption rate of digital health technologies among healthcare providers and patients alike. Besides, the presence of major digital therapeutics companies in North America, coupled with favorable government policies and a growing awareness about the benefits of digital therapeutics, further propel the

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market growth. For instance, on 7 November 2023, Vida Health, a leader in virtual cardiometabolic care, partnered with Withings Health Solutions, a key player in advanced everyday wearables, to provide top-tier digital monitoring devices to Vida members. This partnership offered eligible Vida members access to a Withings Body Pro cellular scale, a BPM Connect Pro cellular blood pressure monitor, or both. Vida's care teams gained reliable and consistent patient-generated health data, which enhanced their personalized care strategies and improved health outcomes by using these devices.

Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the digital therapeutics industry include 2Morrow Inc., Canary Health Inc., Click Therapeutics Inc., Mango Health Inc. (TrialCard Incorporated), Noom Health Inc., Omada Health Inc., Pear Therapeutics, Inc., Propeller Health (ResMed), Teladoc Health Inc., Voluntis Inc., and WellDoc Inc. (Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

At present, companies are strategically enhancing their offerings and expanding their reach to bolster growth in the digital therapeutics market. Additionally, central to their efforts is forging partnerships with established healthcare entities and insurers, which helps integrate digital therapeutics into mainstream medical practice and increases patient accessibility. Moreover, various innovations by firms are advancing their technologies to improve patient engagement and outcomes through more personalized and effective treatments. Along with this, regulatory approvals are aggressively pursued to ensure compliance and enhance market credibility, crucial for broader adoption. Besides, companies invest in educational campaigns to raise awareness among healthcare professionals and patients about the benefits of digital therapeutics, aiming to shift perceptions and foster trust. These combined efforts are essential for driving the adoption and long-term viability of digital therapeutics in the healthcare landscape.

Key Questions Answered in This Report

1. What was the size of the global digital therapeutics market in 2024?
2. What is the expected growth rate of the global digital therapeutics market during 2025-2033?
3. What are the key factors driving the global digital therapeutics market?
4. What has been the impact of COVID-19 on the global digital therapeutics market?
5. What is the breakup of the global digital therapeutics market based on the application?
6. What is the breakup of the global digital therapeutics market based on the end use?
7. What are the key regions in the global digital therapeutics market?
8. Who are the key players/companies in the global digital therapeutics market?

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