



# The Evolving German DiGA Market

## Insights From a Claims Data Analysis

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### BACKGROUND

- With the introduction of Digital Health Applications (in German: Digitale Gesundheitsanwendungen, DiGA), Germany has taken a pioneering step by implementing digital therapeutics in the Statutory Health Insurance (SHI).
- The SHI covers the prescription costs for applications that are given a positive evaluation by the Federal Institute for Drugs and Medical Devices. In October 2020, the first DiGA became available for SHI-insured persons.
- This study investigates how the German DiGA market developed between its establishment in October 2020 and June 2023 (33 months).

### MATERIALS & METHODS

- The analyses are based on claims data of the largest German SHI fund, Techniker Krankenkasse (TK), with approx. 11.1mn insured persons (in 2023).
- We descriptively analyzed all DiGA activation codes issued by the TK between October 2020 and June 2023. The analyses focused on usage patterns, market shares, and costs, as well as prescriber and user characteristics.
- During the observation period, 53 DiGA were listed in the reimbursement catalogue and considered in our analyses.

### RESULTS

#### Frequency of Use

- By June 2023, 86,000 activation codes were issued to about 69,000 individuals insured by the TK (Table 1). Thus, within the first 33 months after the introduction of DiGA, approximately 0.8% of the total TK population received an activation code. During the period, 87% of issued codes were redeemed.
- The average growth rate of quarterly issued activation codes between Q1/2021 and Q2/2023 was 21%. However, in three of the last five quarters of the observation period, the quarterly growth rates were far below 10% (Figure 1).

#### Market Shares by Indication Area

- The ten (19%) most frequently used DiGA accounted for more than 75% of the activation codes issued until June 2023. On the other hand, the individual market shares of two thirds of the listed DiGA did not exceed 1%.
- With a share of 31%, mental health was the predominant indication area (Table 2), followed by muskuloskeletal diseases (19%), and endocrine, nutritional and metabolic diseases (16%).

#### Costs per Prescription

- Mean costs per prescription increased from €298 in Q4/2020 to €357 in Q2/2023 (Figure 2). This was mainly due to the increasing level of the freely-set manufacturer prices.

#### User and Prescriber Characteristics

- Two thirds of the DiGA users were female (Table 1). The mean age of all users was 45 years. Notably, the mean age of DiGA users decreased over time from 48 years in Q1/2021 to 44 years in Q2/2023
- Approximately 12% of all German outpatient care providers issued a DiGA prescription to TK-insured persons (Table 1). General practitioners were the single specialist group with the highest share of prescriptions issued (38%).
- On average, each DiGA prescriber issued 2.7 prescriptions (Table 1). However, 20% of the prescribers accounted for over 60% of prescriptions. 55% of the prescribers only issued one DiGA prescription during the observation period.

Table 1: Overview of DiGA Usage Covered by the TK. October 2020 to June 2023.

Activation Codes Issued	86,213
Costs Covered by the TK	€25,616,423
DiGA Users	68,933
Female	4,883 (66.6%)
Male	23,050 (33.4%)
Mean Age	44.9y
Prescribers	22,246
Prescriptions	60,943
Top 1 Specialist Group: General Practitioner	22,900 (37.6%)
Top 2 Specialist Group: Orthopaedics	10,318 (16.9%)
Top 3 Specialist Group: Psychiatry and Psychotherapy	8,980 (14.7%)
Prescriptions per Prescriber	2.7

Figure 1: DiGA Activation Codes Quarterly Issued by the TK (N=86,213). October 2020 to June 2023.

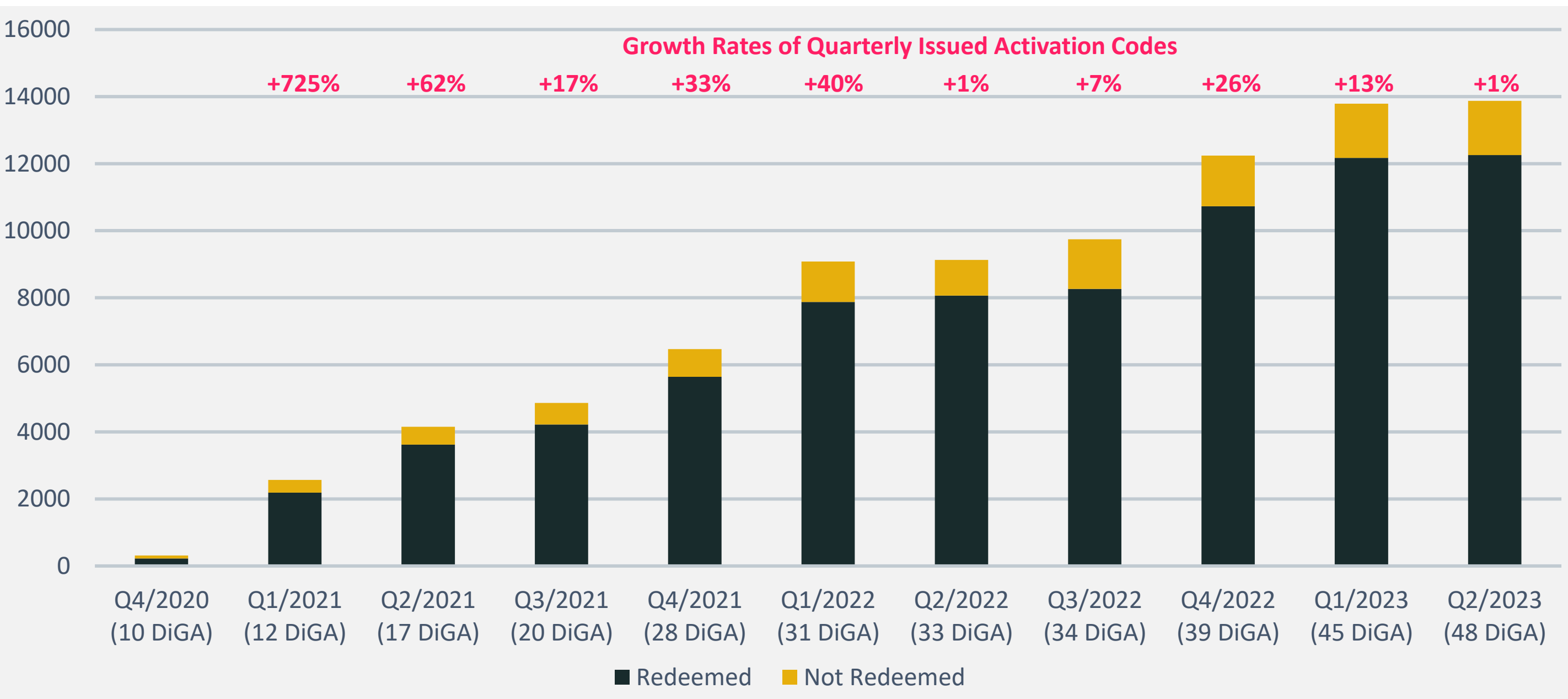
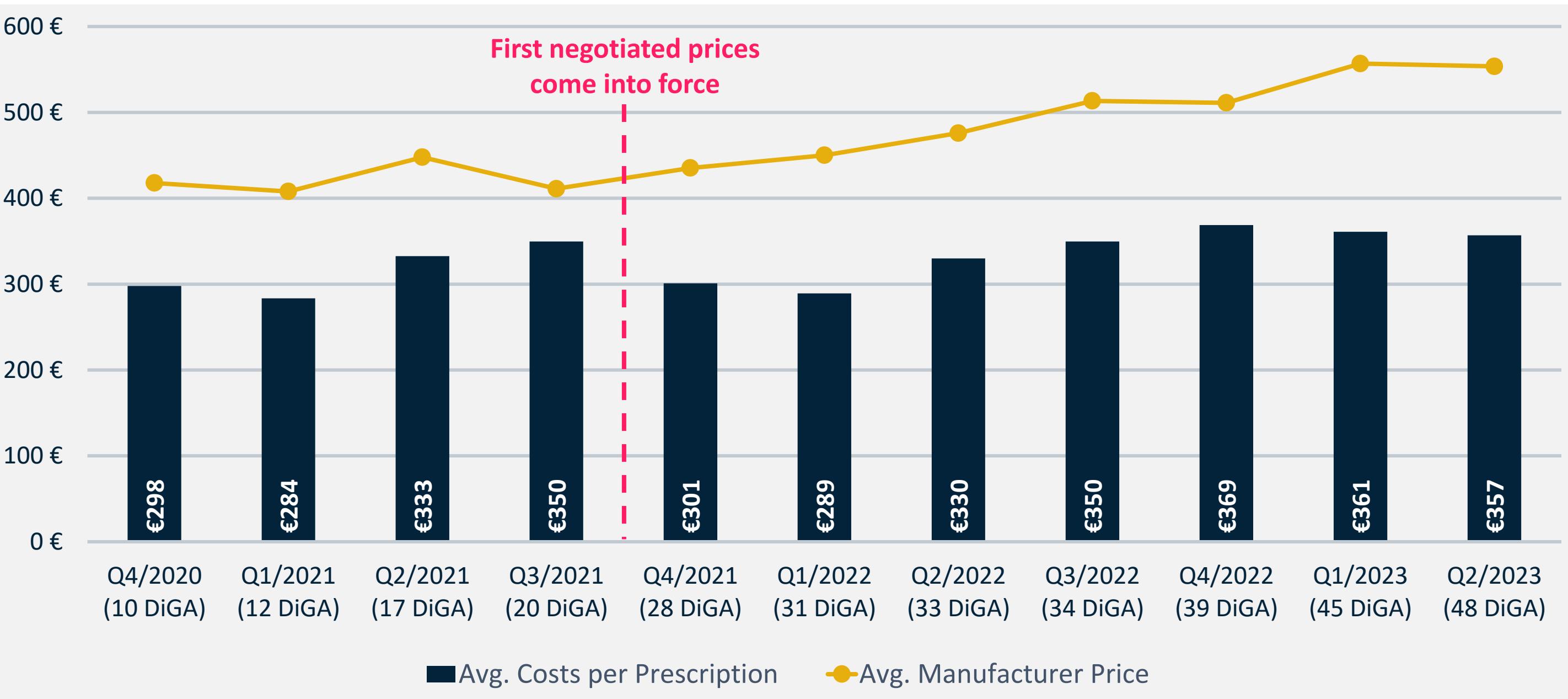


Table 2: DiGA Market Shares (Activation Codes Issued) by Indication Areas. October 2020 to June 2023.

ICD-10 Chapter	Proportion of Activation Codes Issued
V Mental and Behavioral Disorders	30.7%
XIII Diseases of the Musculoskeletal System and Connective Tissue	19.1%
IV Endocrine, Nutritional and Metabolic Diseases	16.3%
VIII Diseases of the Ear and Mastoid Process	14.6%
XIV Diseases of the Genitourinary System	6.8%
VI Diseases of the Nervous System	6.1%
Other	6.4%

Figure 2: Average Costs per Prescription and Manufacturer Price per Quarter. October 2020 to June 2023.



### CONCLUSION

- The relatively low reach and the high concentration of prescriptions on few applications and prescribers indicate that DiGA have not yet truly disrupted outpatient care in Germany.
- Despite the early development phase of the DiGA market and growing number of reimbursable applications, market growth has recently slowed.
- The increasing manufacturer price level was also accompanied by increased costs per prescription. Price caps and lower negotiated prices have not yet interrupted this trend.

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Abbreviations: Avg.: Average; DiGA: Digital Health Applications/Digitale Gesundheitsanwendungen; SHI: Statutory Health Insurance; TK: Techniker Krankenkasse