

EXECUTIVE SUMMARY: Overall commentary was constructive on the opportunity for Continuous Glucose Monitors (CGM) within the target population. Regarding specific players, feedback was broadly positive from DexCom and Livongo users with a majority noting they would recommend the offering to friends and family and respondents voicing high levels of satisfaction with their experience. Additionally, respondents indicated that, by their estimation, their respective programs had helped them better manage their chronic condition and improve their overall quality of life.

CONTINUOUS GLUCOSE MONITORS (CGM) OPPORTUNITY

Adoption of CGM's appears to be in early innings with roughly 16% of respondents noting that they utilize a CGM to test blood sugar levels. For context, roughly 76% of respondents noted that they use a finger prick test. Of that subset, 66% of respondents noted that they are currently evaluating a CGM offering. Taken together, feedback was generally constructive around the CGM market opportunity overall. However, respondents who are evaluating CGM offerings provided varied feedback around specific manufacturers. We would highlight that commentary shaded a bit more positively around Abbott relative to DexCom, with 18% of respondents pointing out that they evaluated Abbott products, while 11% of respondents evaluated DexCom devices (Medtronic was evaluated by ~14% of respondents). With that said, ~60% of respondents had not evaluated any of the listed offerings, which may represent an opportunity in itself (especially as a high percentage of CGM users indicated they use a CGM in part due to a doctor recommendation vs. nudges from other channels).

TECHNOLOGY ADOPTION

Feedback around tech savviness from the target diabetes population varied. The data indicated that roughly 94% of respondents own a smartphone, while the majority don't presently own a smartwatch (>50% of all respondents don't own a smartwatch). For perspective, 34% of respondents reported being owners of an Amazon Alexa device. With that said, when DexCom users were asked if they use their smartphone or company receiver, the vast majority (77%) noted that they use their smartphone primarily.

INSULIN PUMPS AND PENS

A plurality of respondents indicated that they use an insulin pen, while 14% noted that they use an insulin pump. Roughly 50% of pen users are considering moving over to an insulin pump therapy offering. Of the insulin pump users surveyed, most use a Medtronic pump (followed by Tandem and Animas).

MANUFACTURER SPECIFIC FEEDBACK

Aided awareness of Abbott registered higher than that of Dexcom and Medtronic. Awareness was roughly equal across Livongo, Omada, and Glooko (and lower overall relative to Dexcom, Abbott, and Medtronic).

AUDIENCE NOTES

"DexCom Audience Sample Size" = 300 Current and Former Users

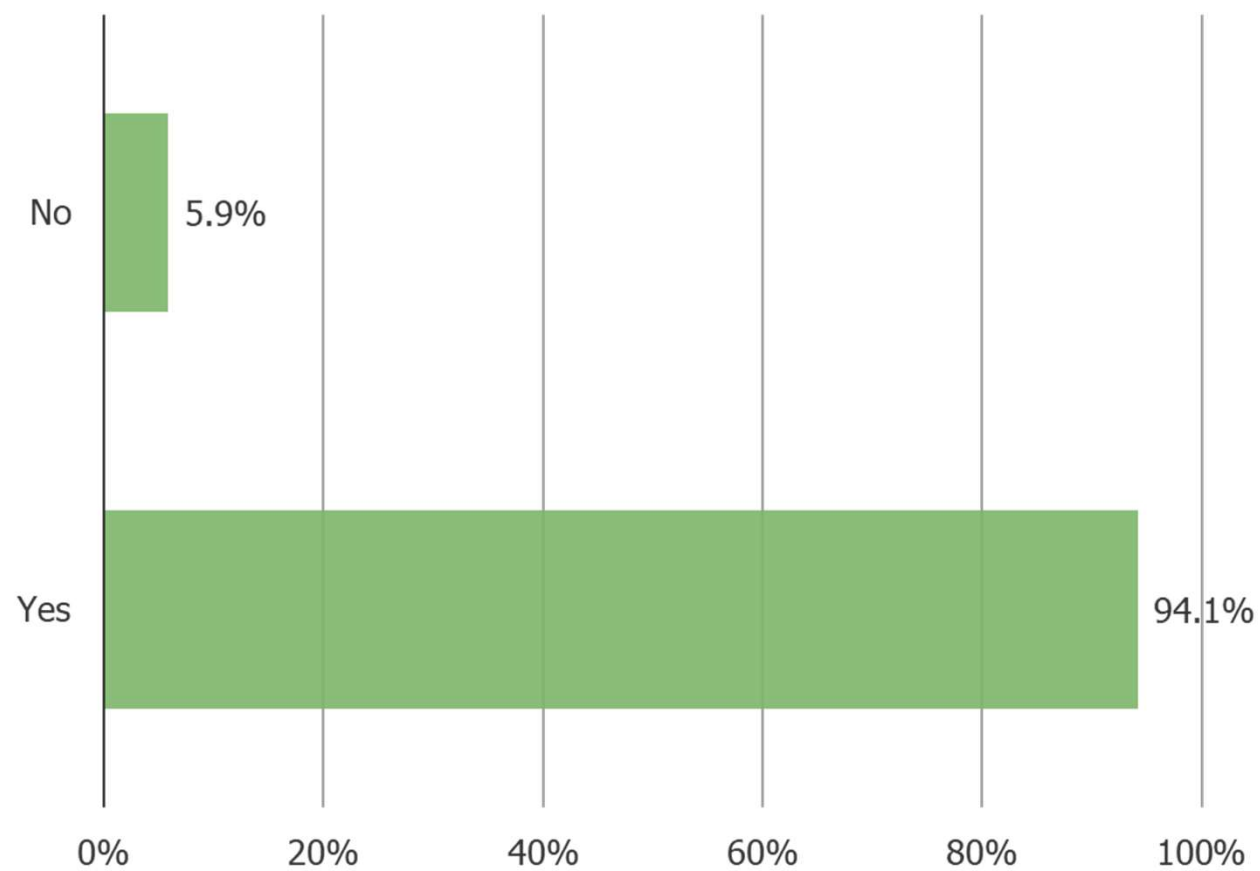
"Livongo Audience Sample Size" = 250 Current and Former Members

Diabetes | Stats Page

| | |
|-------|---|
| 94.1% | Own a smartphone. |
| 48.2% | Of pen users are considering an insulin pump. |
| 29.3% | Of diabetics are aware of Abbott. |
| 10.5% | Of diabetics are aware of Livongo. |
| 76.4% | Use a finger prick test. |
| 65.5% | Of respondents who use a finger prick test are considering a CGM. |
| 43.6% | Of CGM device users said a physician recommended the offering. |
| 38.2% | Of Livongo users said they first heard of the company from their employer/HR. |
| 26.1% | Of Livongo users said the health nudges had altered their behavior “a lot”. |
| 17.2% | Of diabetics are aware of DexCom. |
| 42.7% | Of DexCom users noted that they were “very satisfied” with their DexCom experience. |

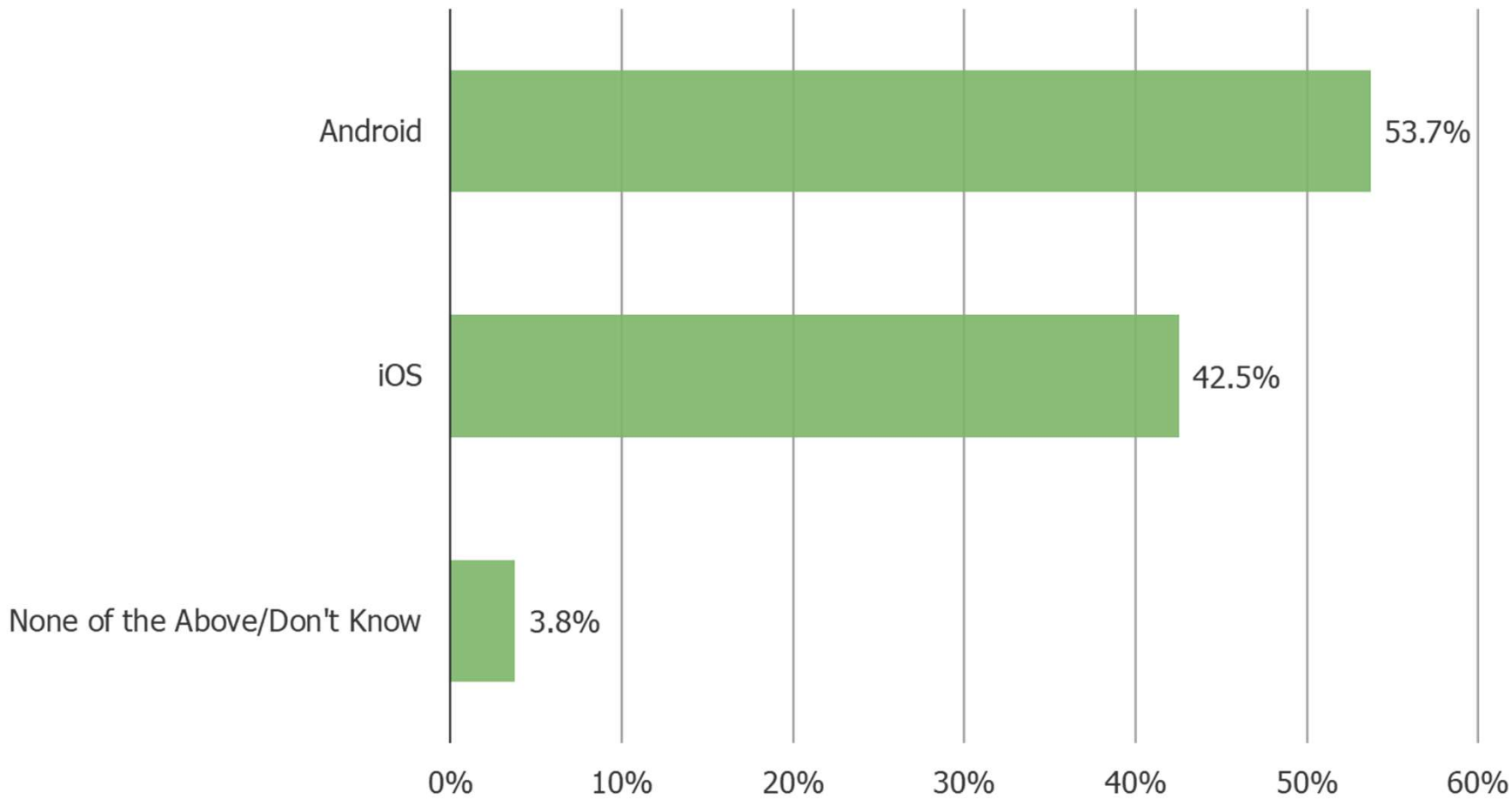
Do you own a smartphone?

Posed to all respondents.



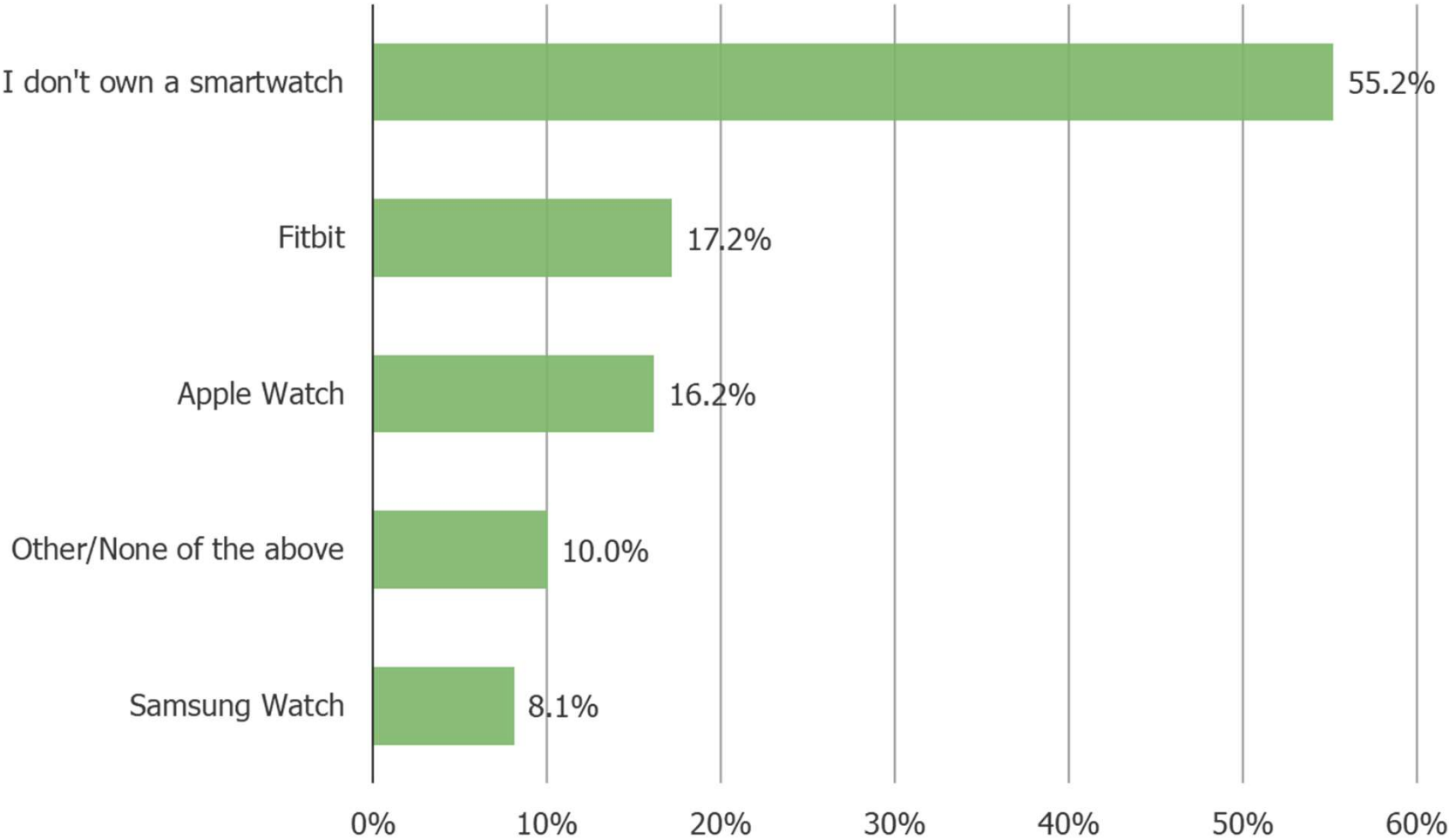
What operating system are you on?

Posed to all respondents.



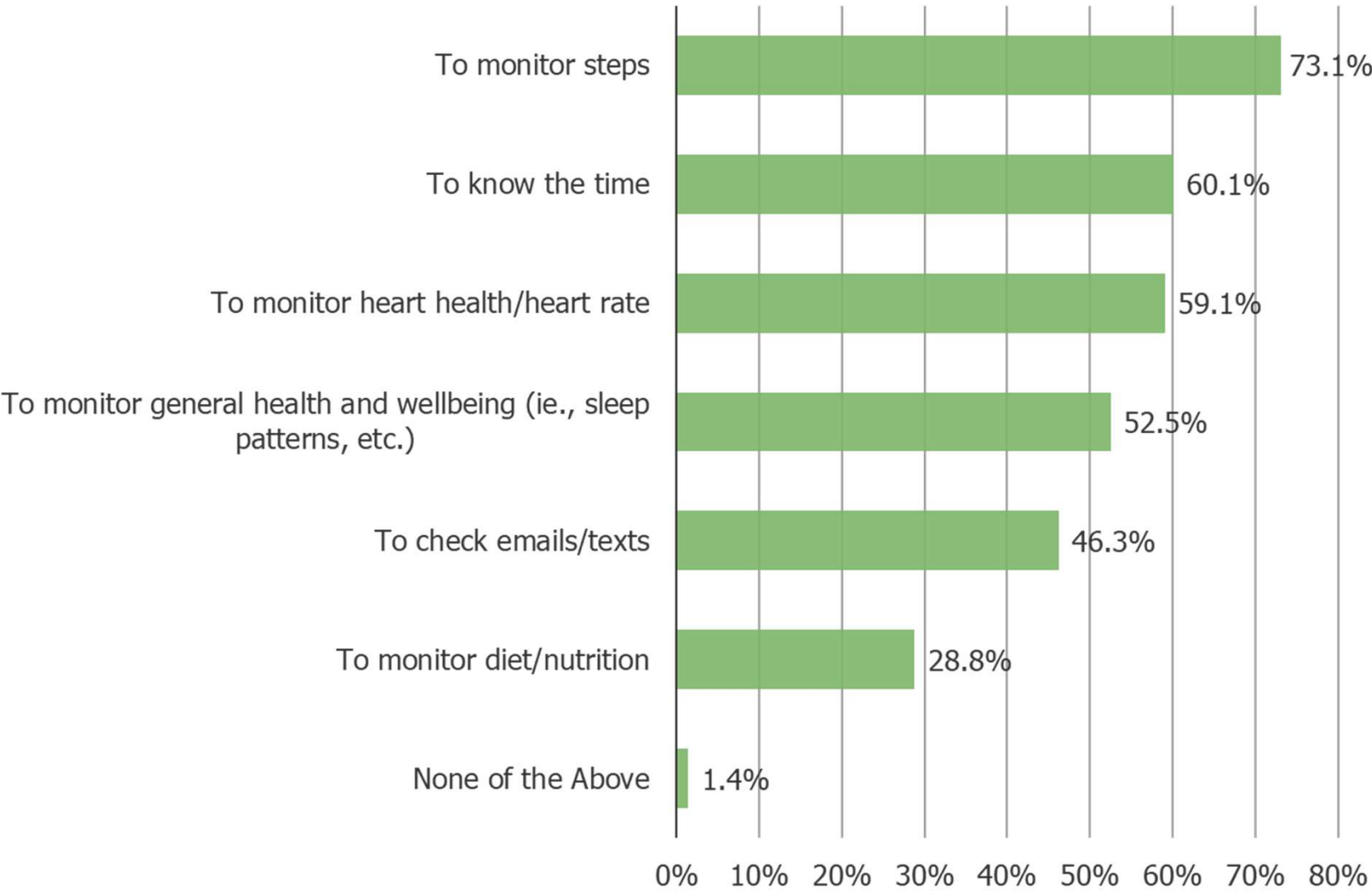
Do you own any of the smartwatches listed below?

Posed to all respondents.



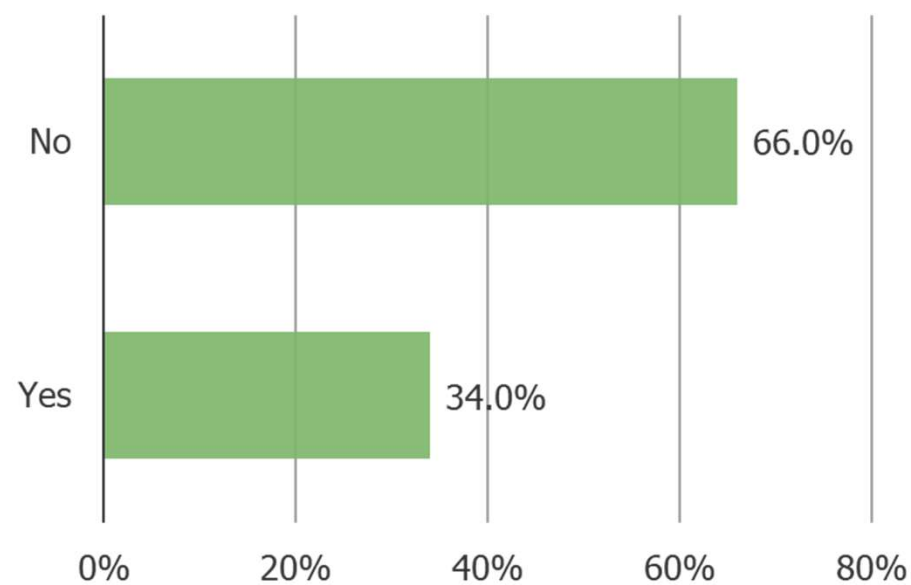
What do you use your smartwatch for? (Select ALL that Apply)

Posed to all respondents who own a smartwatch (any type).

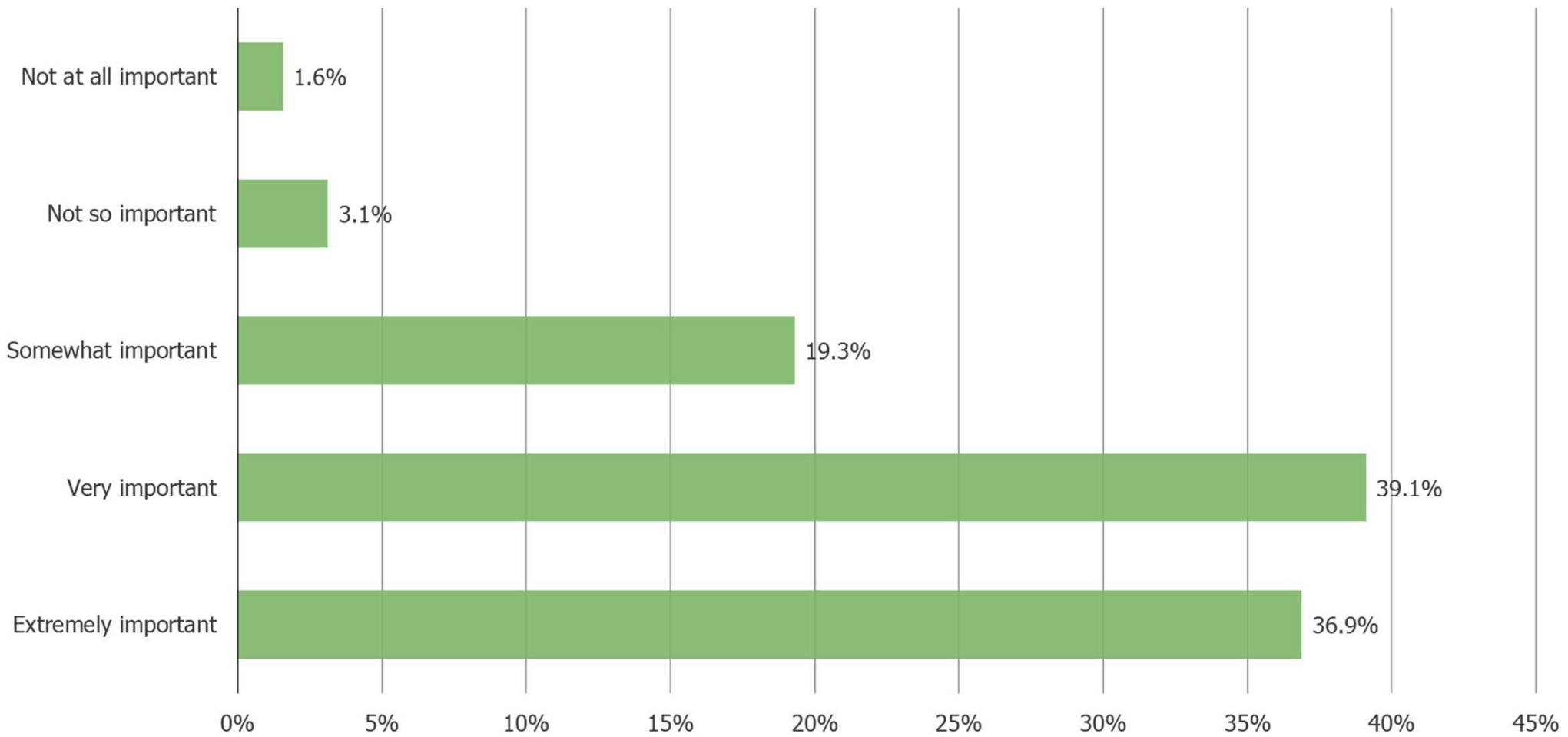


Do you own an Amazon Alexa device?

Posed to all respondents.

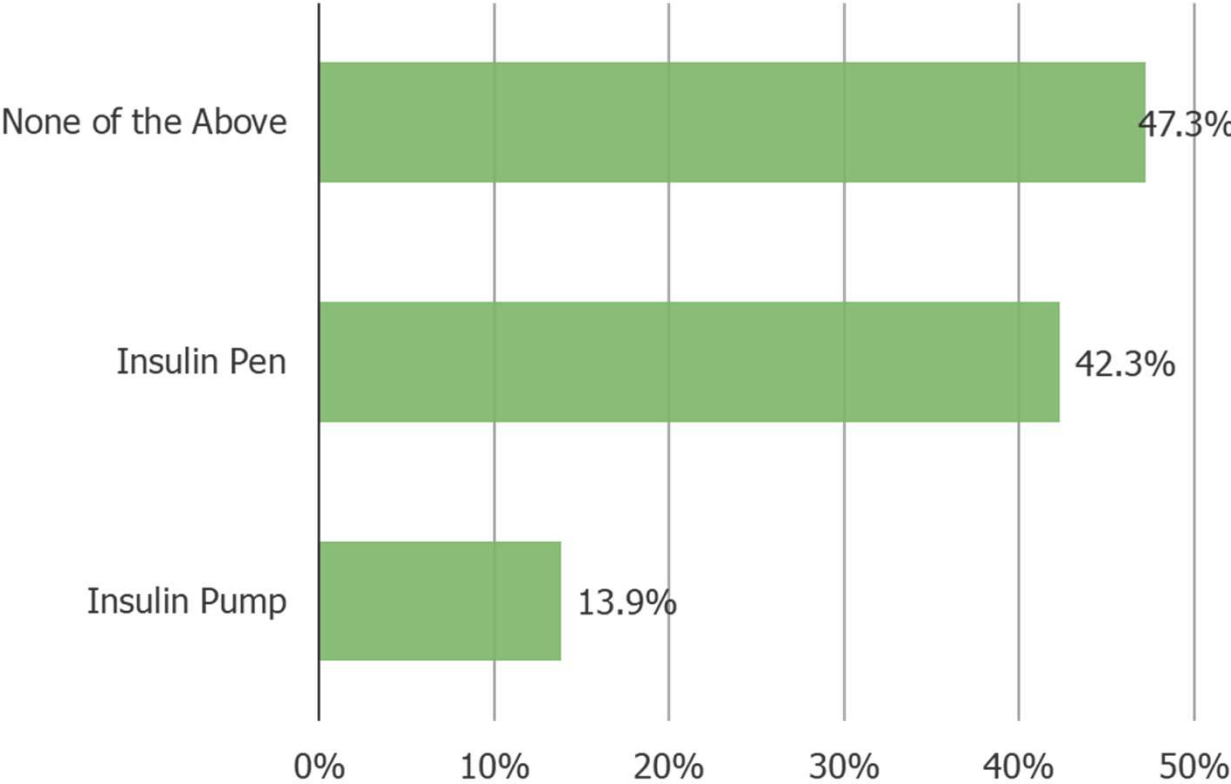


When you are in need of a doctor, how important is it for you to have an in-office visit with a medical/health professional?
Posed to all respondents.



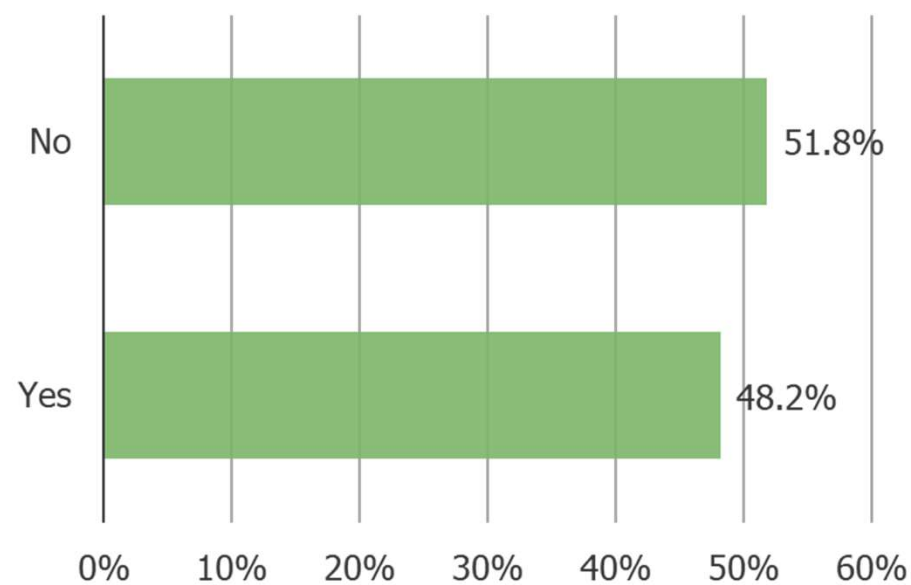
INSULIN PUMPS AND PENS

Do you currently use any of the following?
Posed to individuals with diabetes.



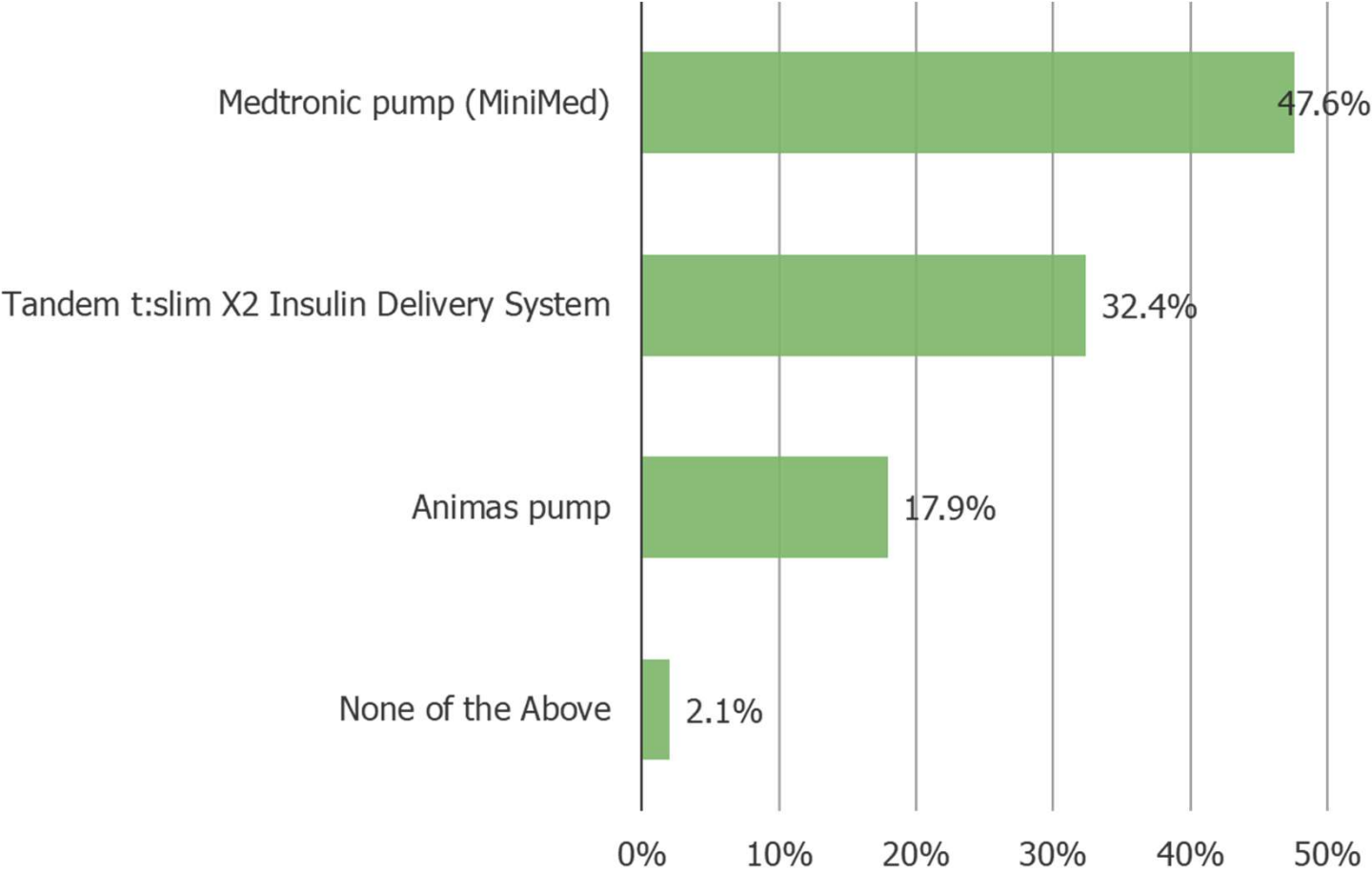
Are you considering moving over to an insulin pump therapy offering?

Posed to individuals with diabetes and who use an insulin pen.



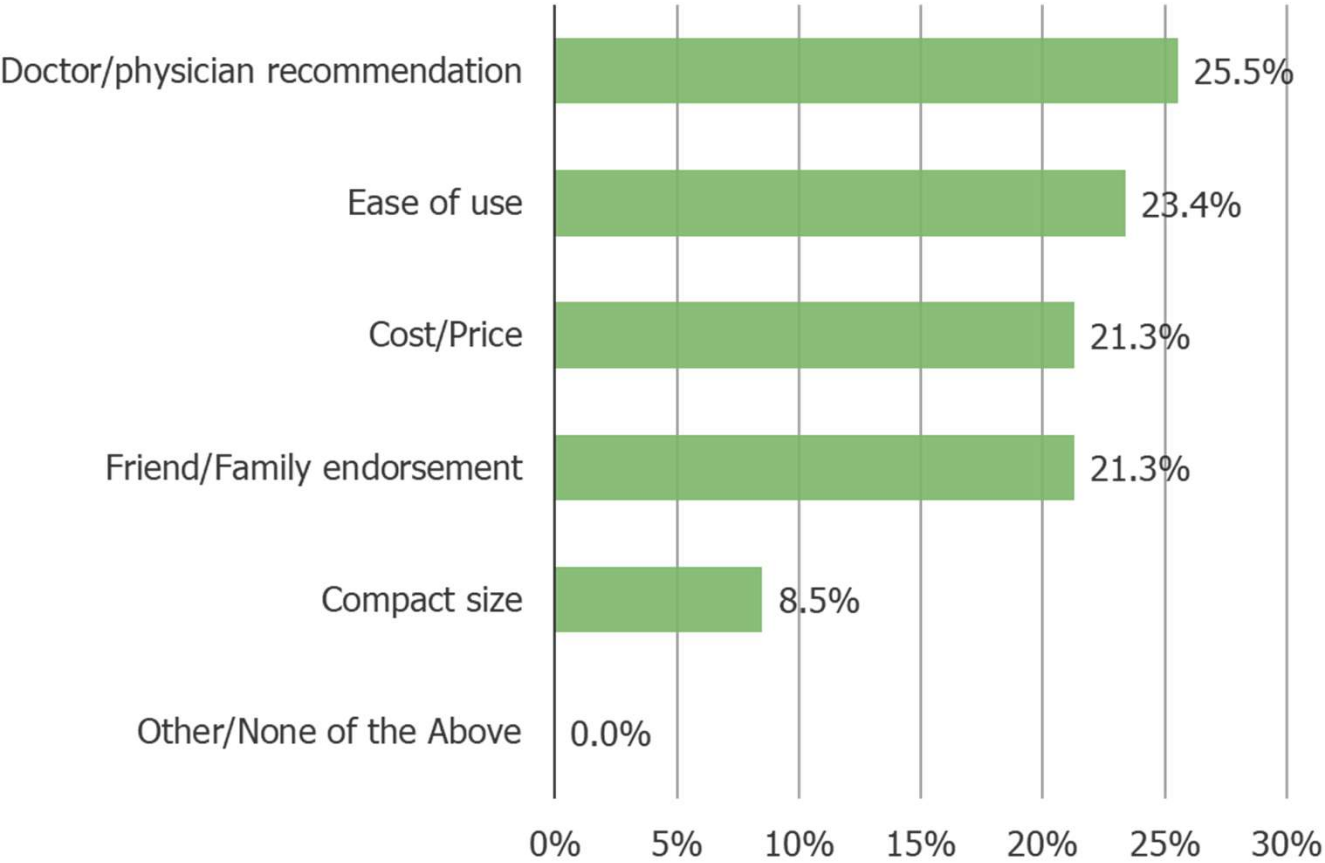
What insulin pump do you use?

Posed to individuals with diabetes and who use an insulin pump.

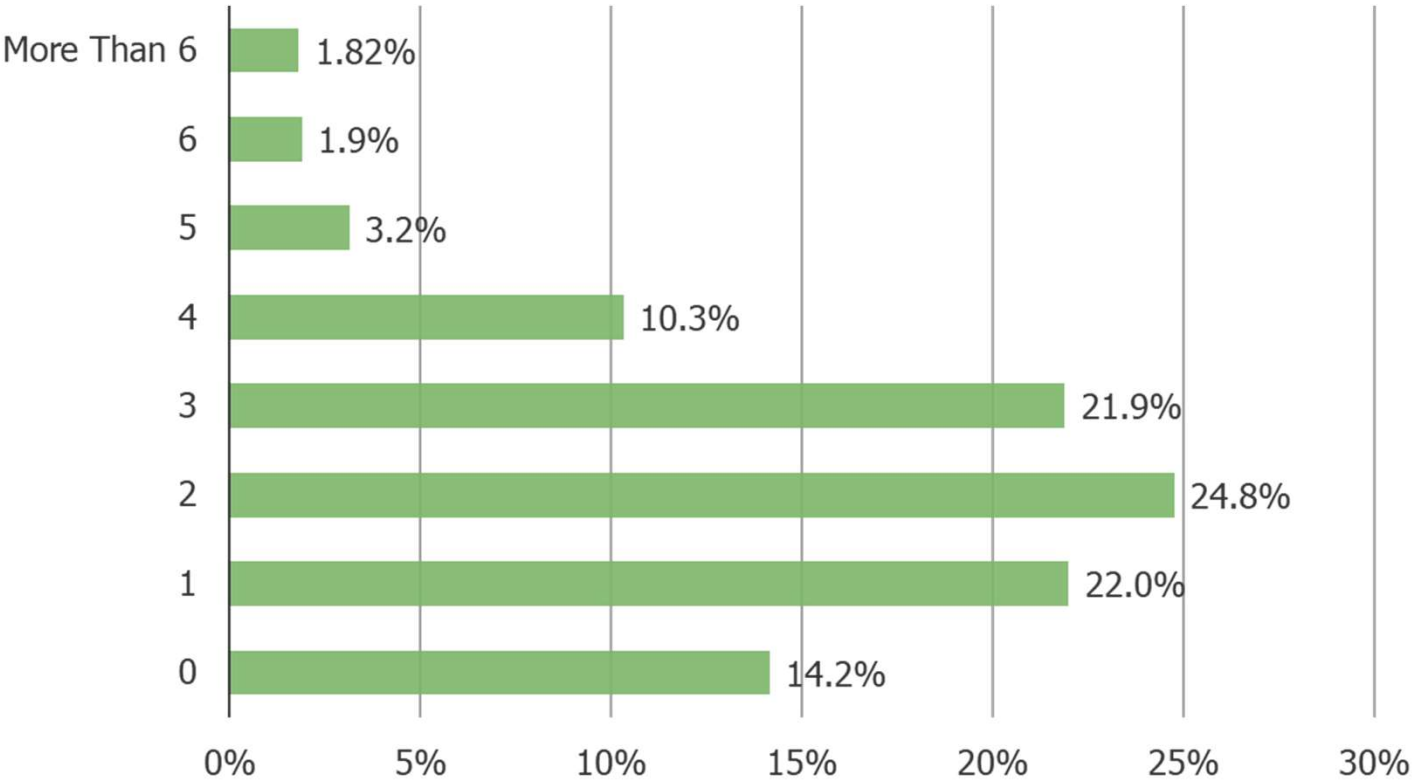


What is the primary reason for why you chose your t:slim X2 offering?

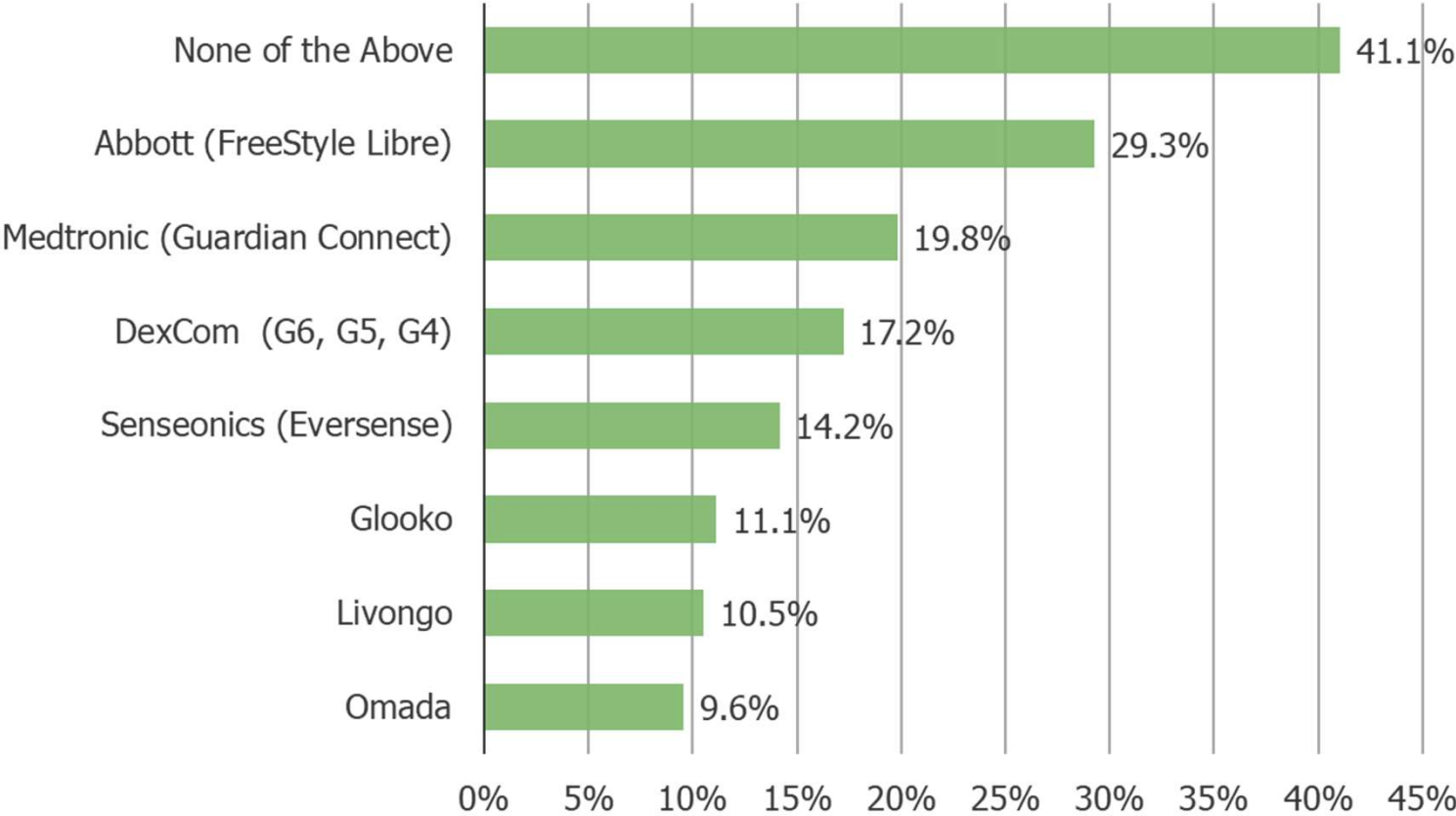
Posed to individuals with diabetes and who use Tandem offering.



How many times a day do you test your blood sugar levels?
Posed to individuals with diabetes.

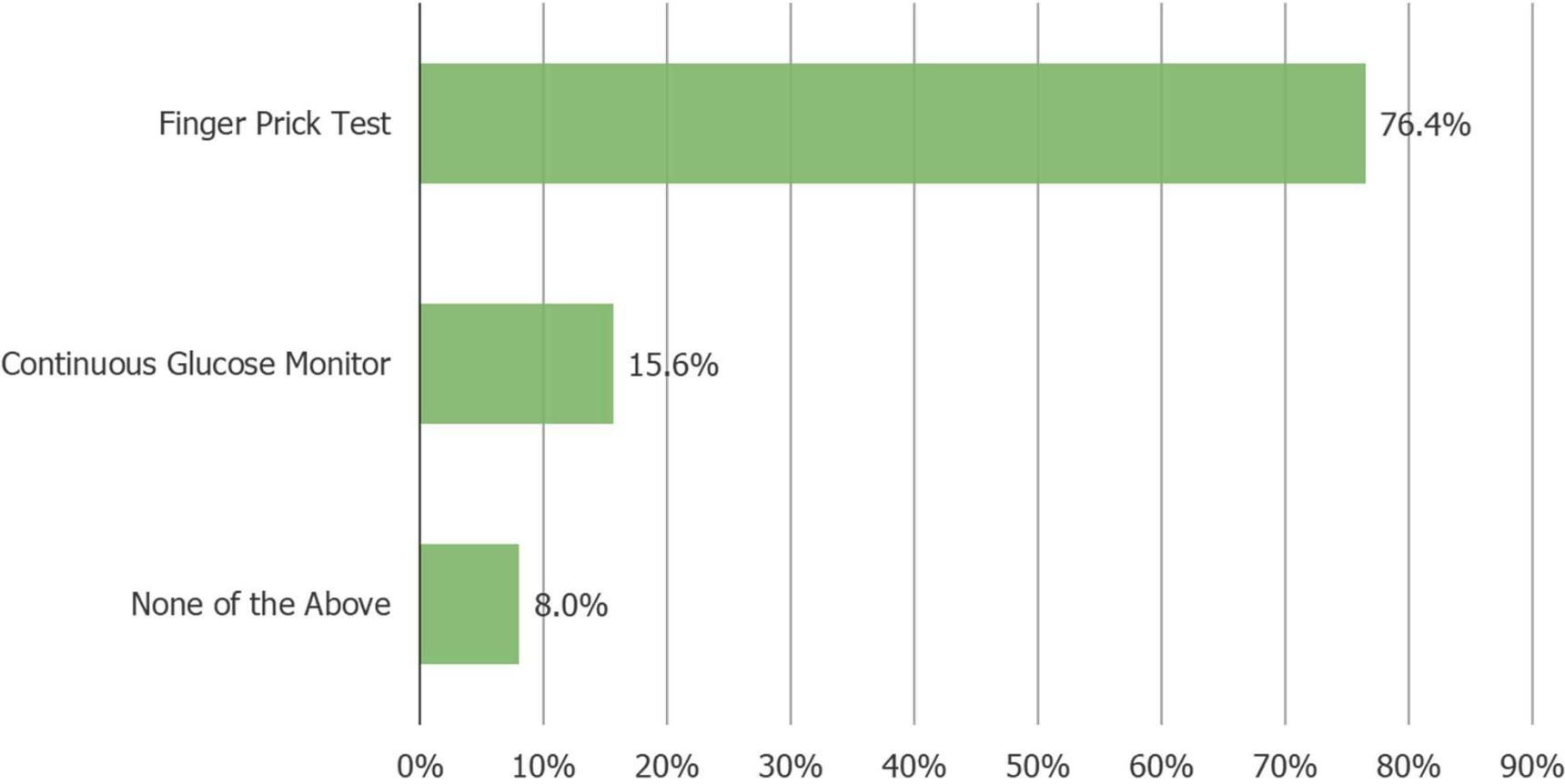


Are you aware of any the following (Select ALL that Apply)?
Posed to individuals with diabetes.

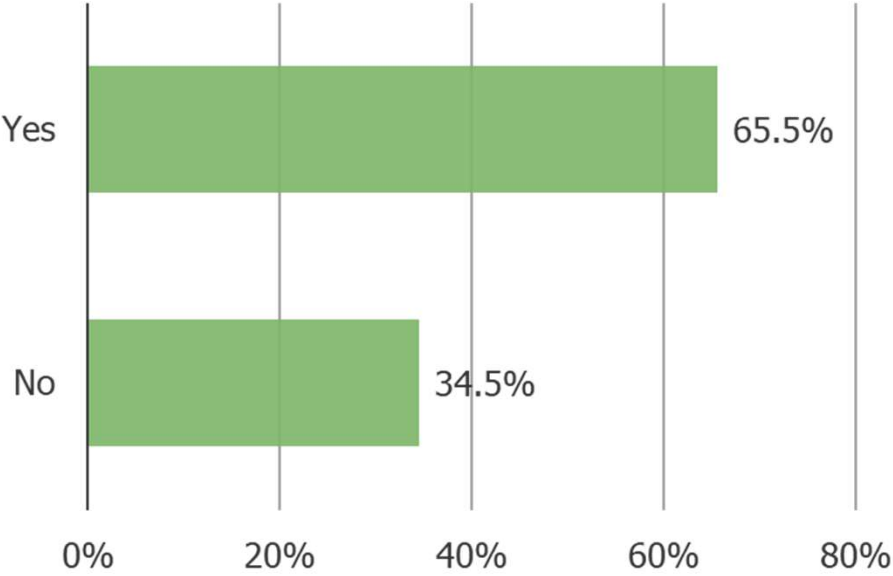


How do you test for your blood sugar levels?

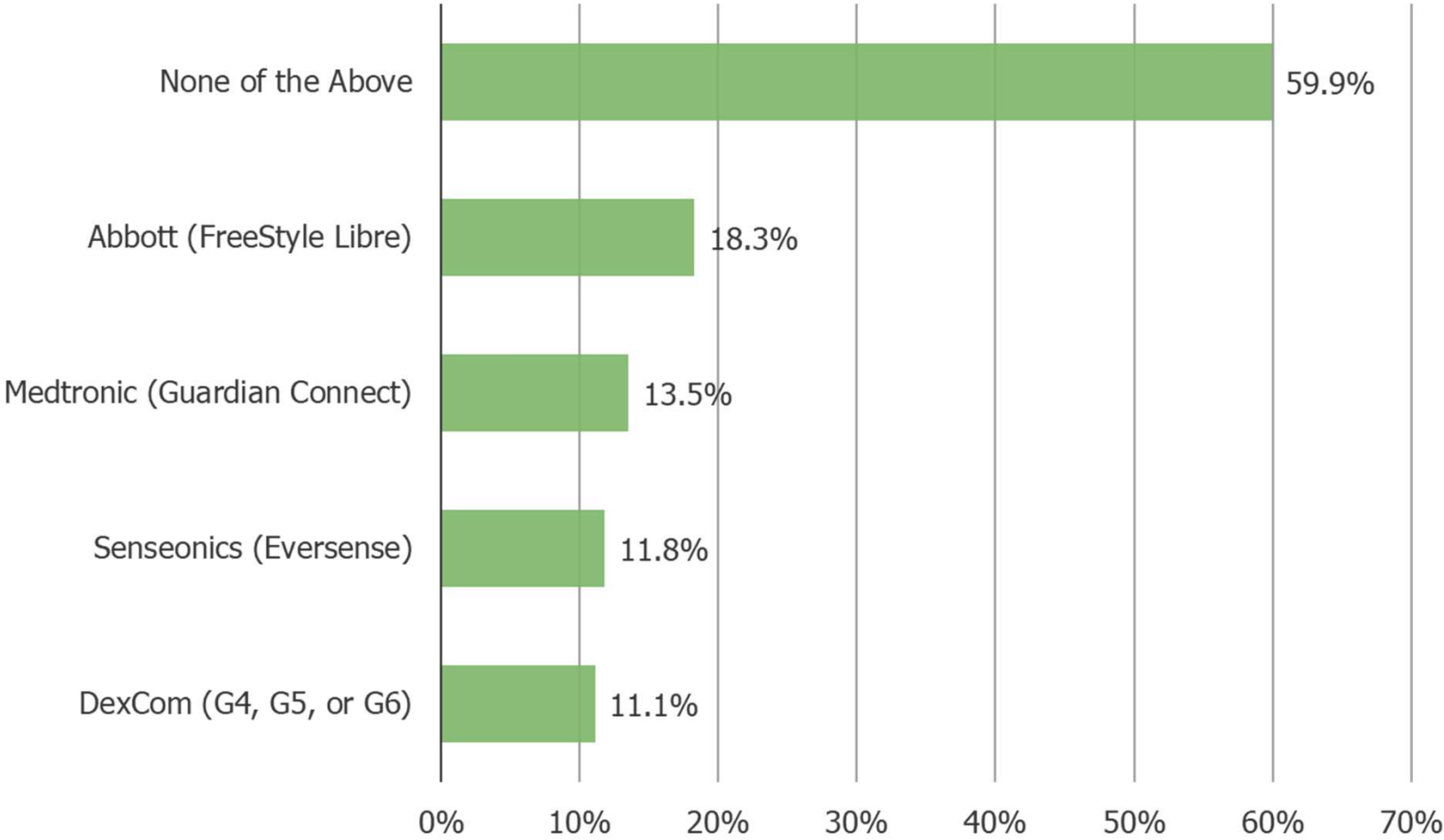
Posed to individuals with diabetes.



Would you or are you considering a continuous glucose monitor offering?
Posed to individuals with diabetes who use a finger prick test.

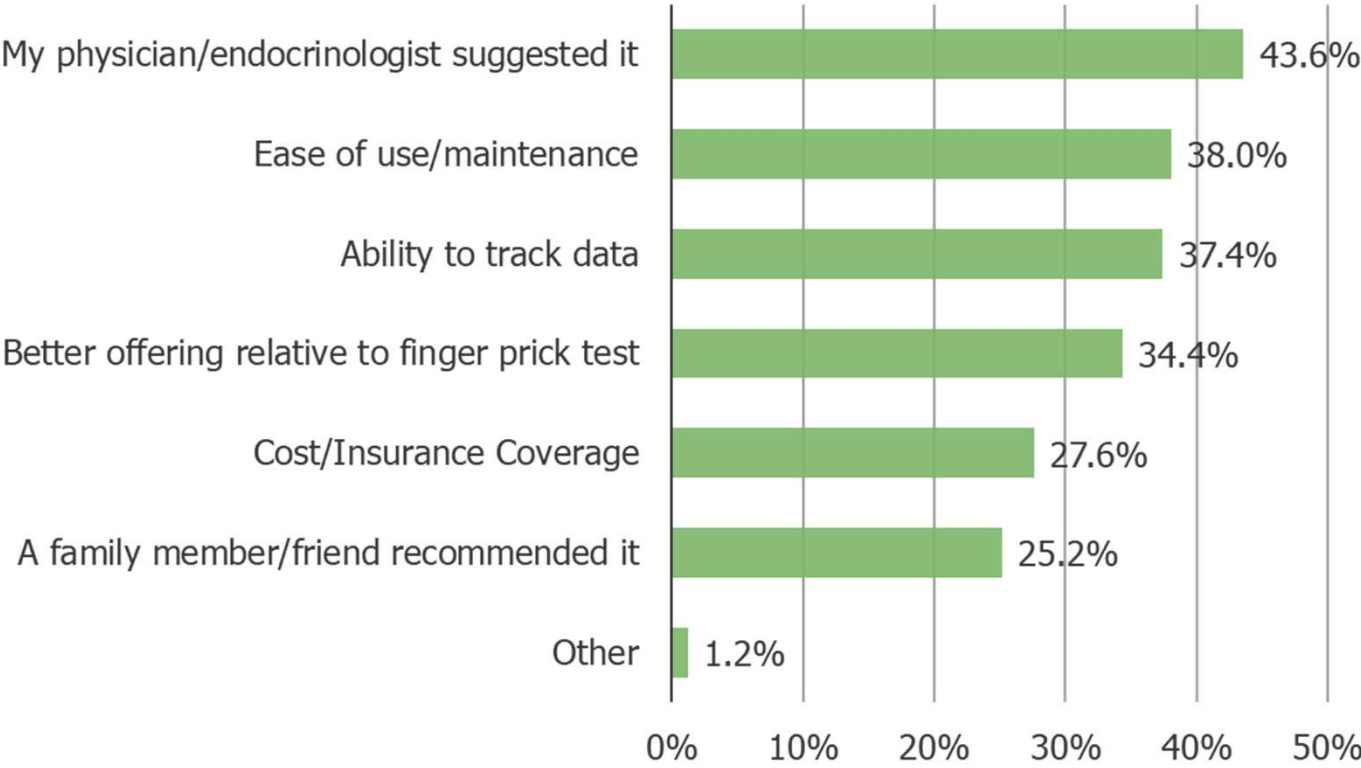


Have you evaluated any of the offerings listed below?
Posed to individuals with diabetes who use a finger prick test.



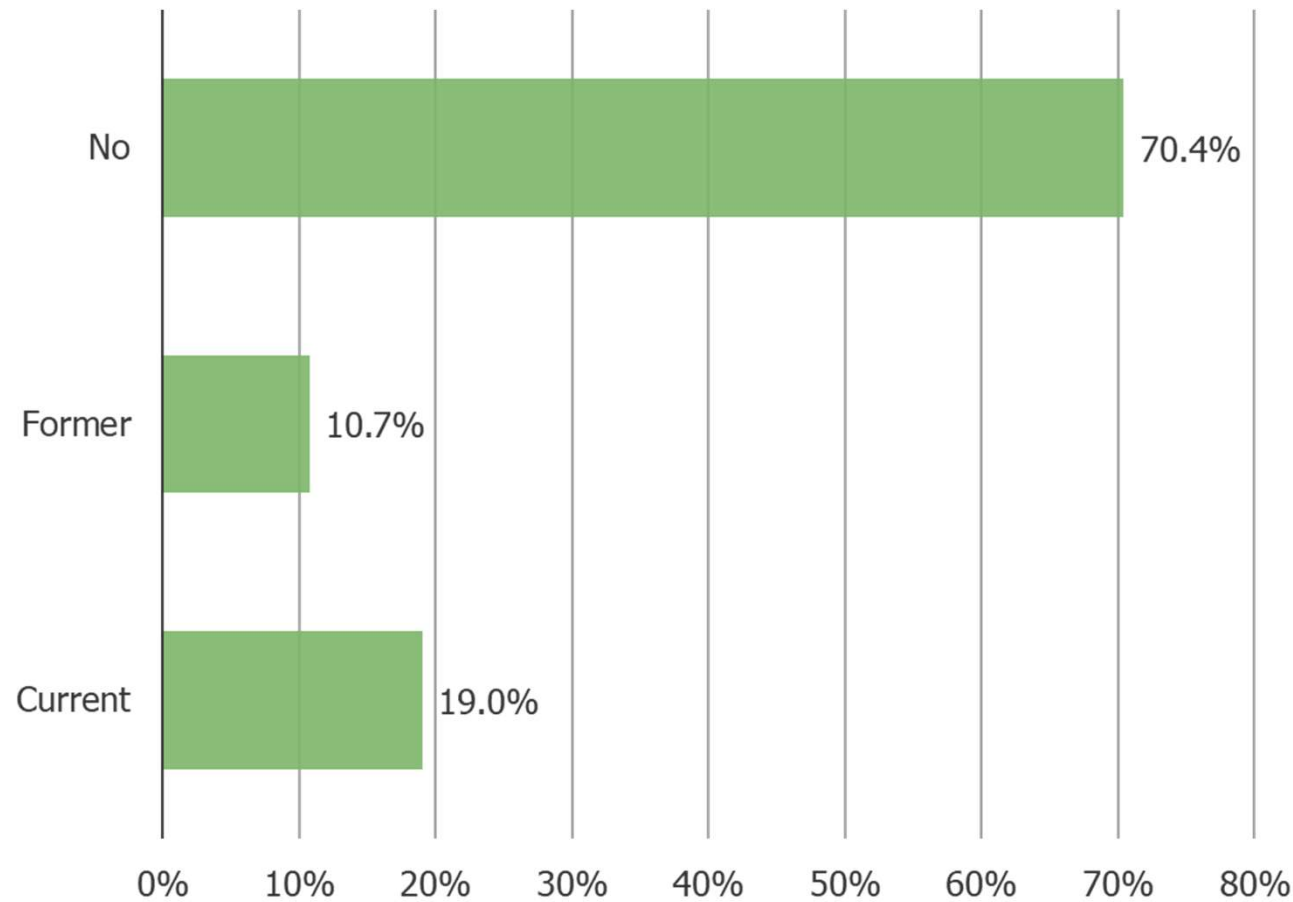
Why did you opt to use a continuous glucose monitor? (Select ALL the Apply)

Posed to individuals with diabetes who use a CGM device.



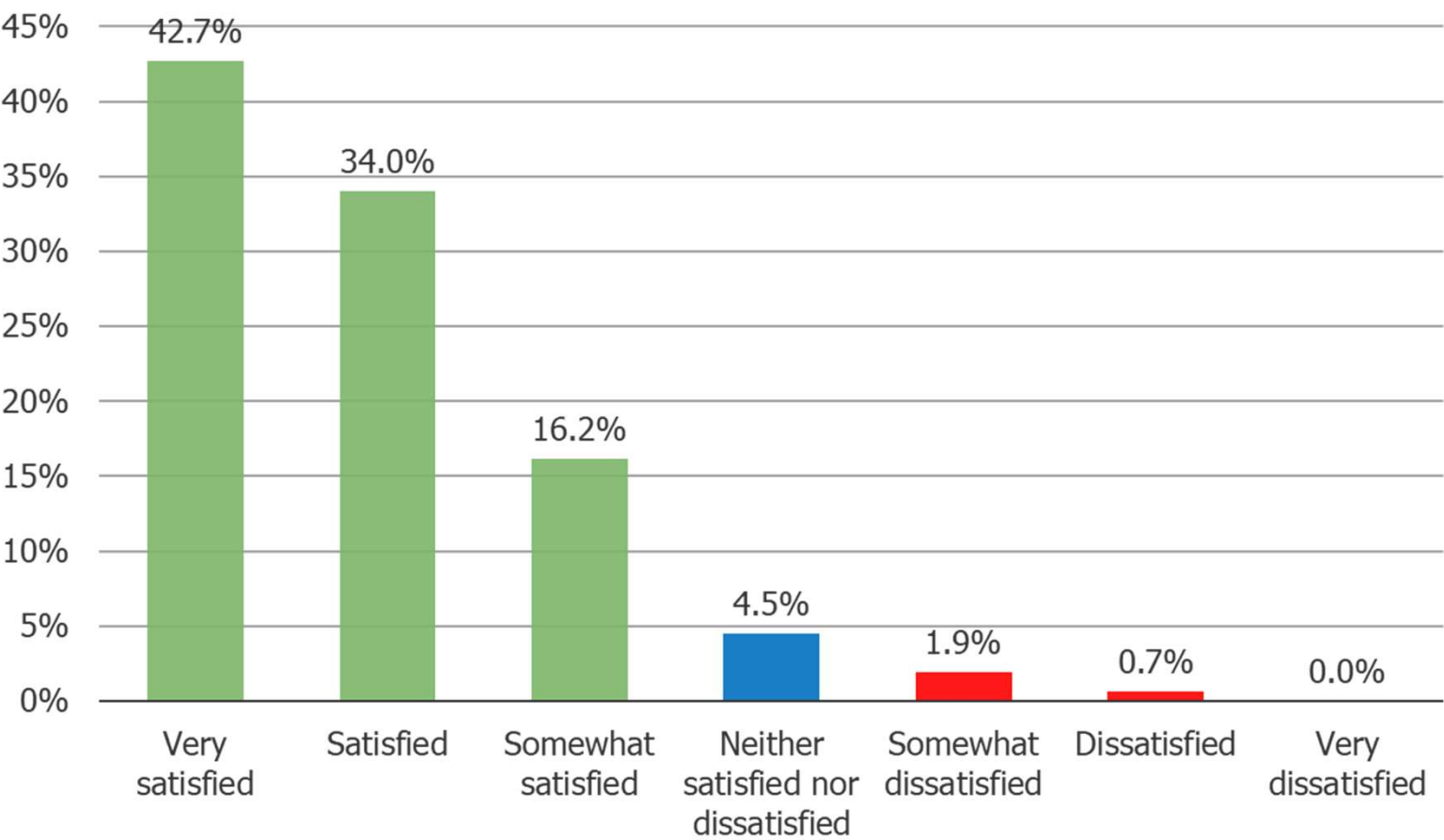
Are you a current or former DexCom customer?

Posed to all respondents.

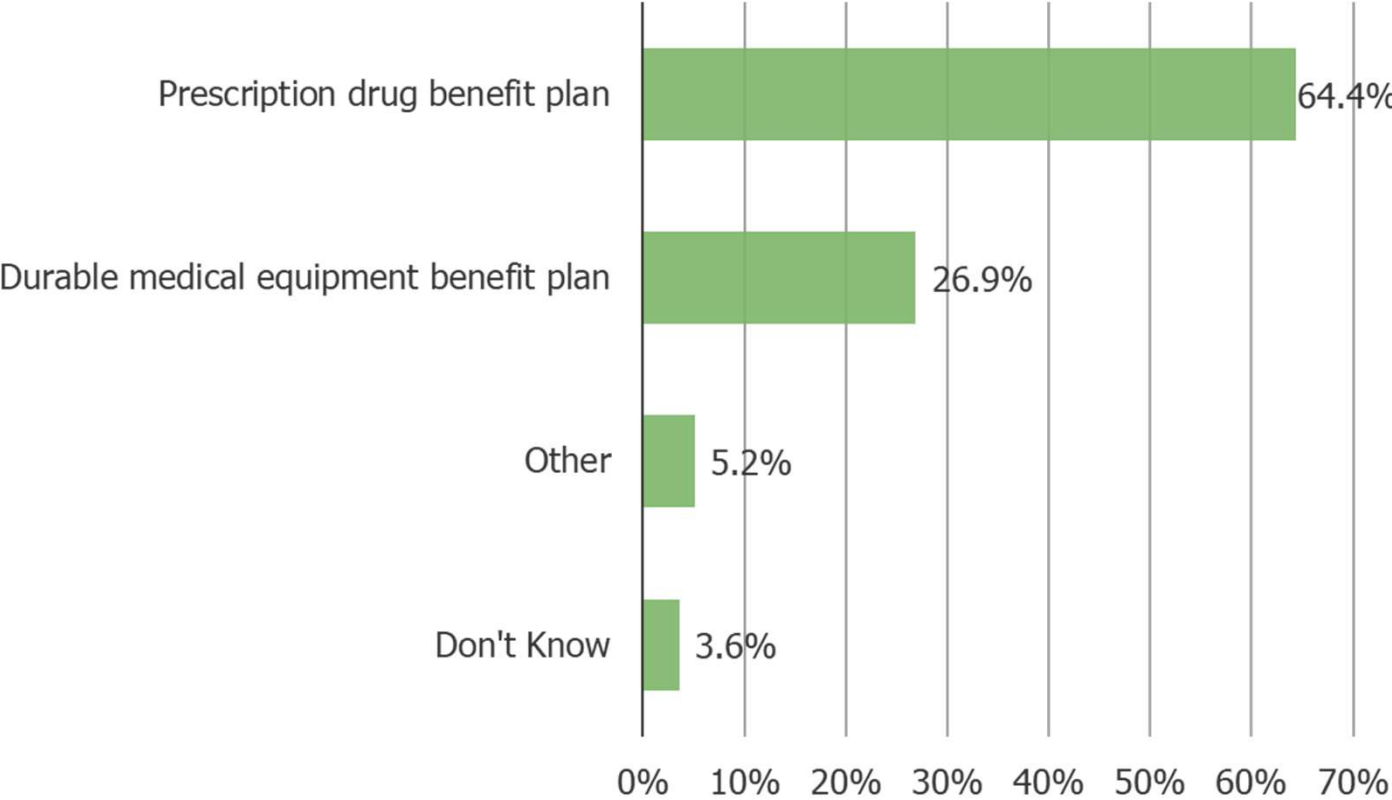


How satisfied are/were you with your DexCom experience?

Posed to individuals with diabetes who use or have used a DexCom device.

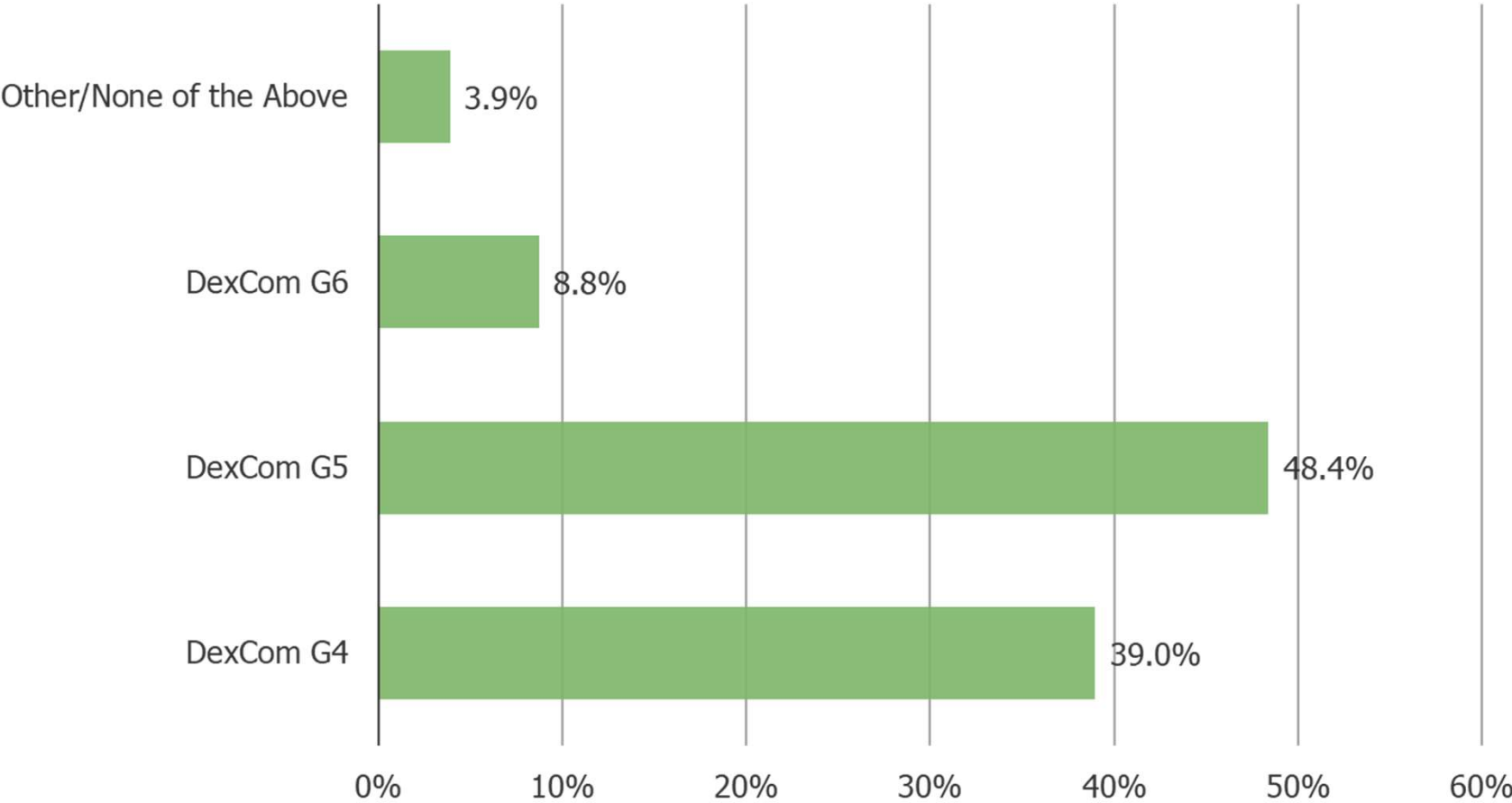


Is your continuous glucose monitor device covered under a prescription drug benefit, durable medical equipment benefit, or other?
Posed to individuals with diabetes who use or have used a DexCom device.



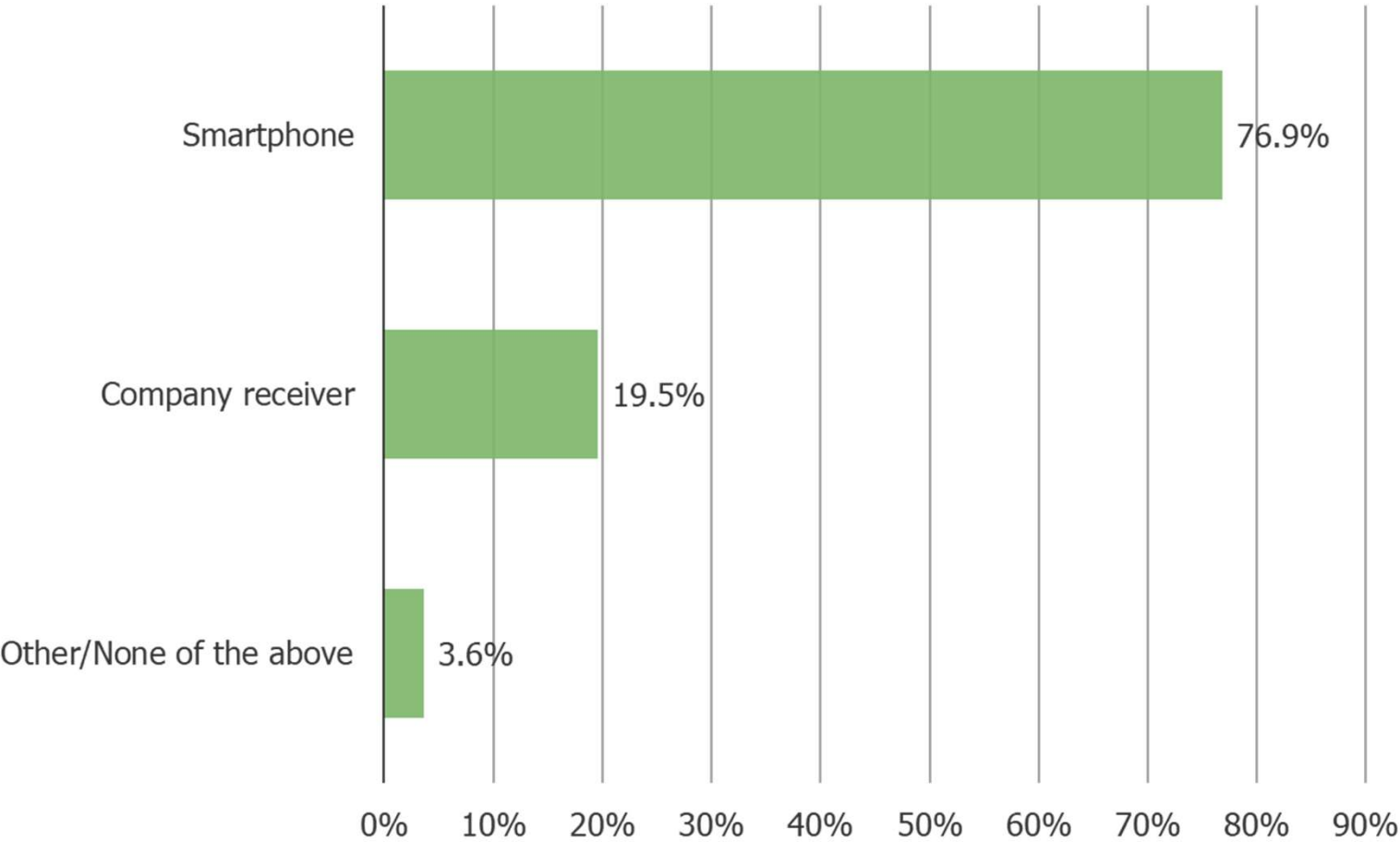
What DexCom product did or do you utilize?

Posed to individuals with diabetes who use or have used a DexCom device.



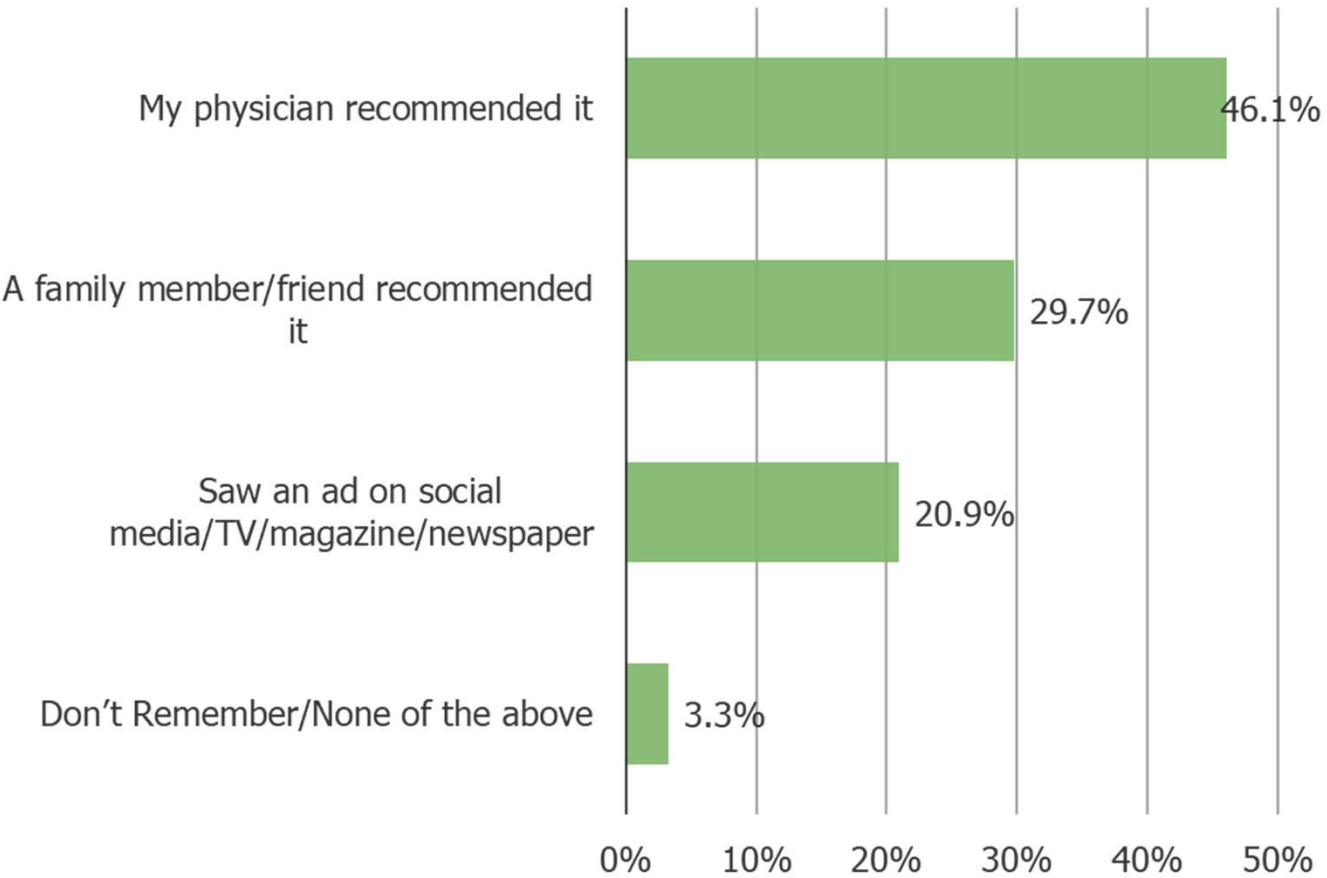
Did you or do you use your smartphone or company receiver (ie., DexCom receiver)?

Posed to individuals with diabetes who use or have used a DexCom device.



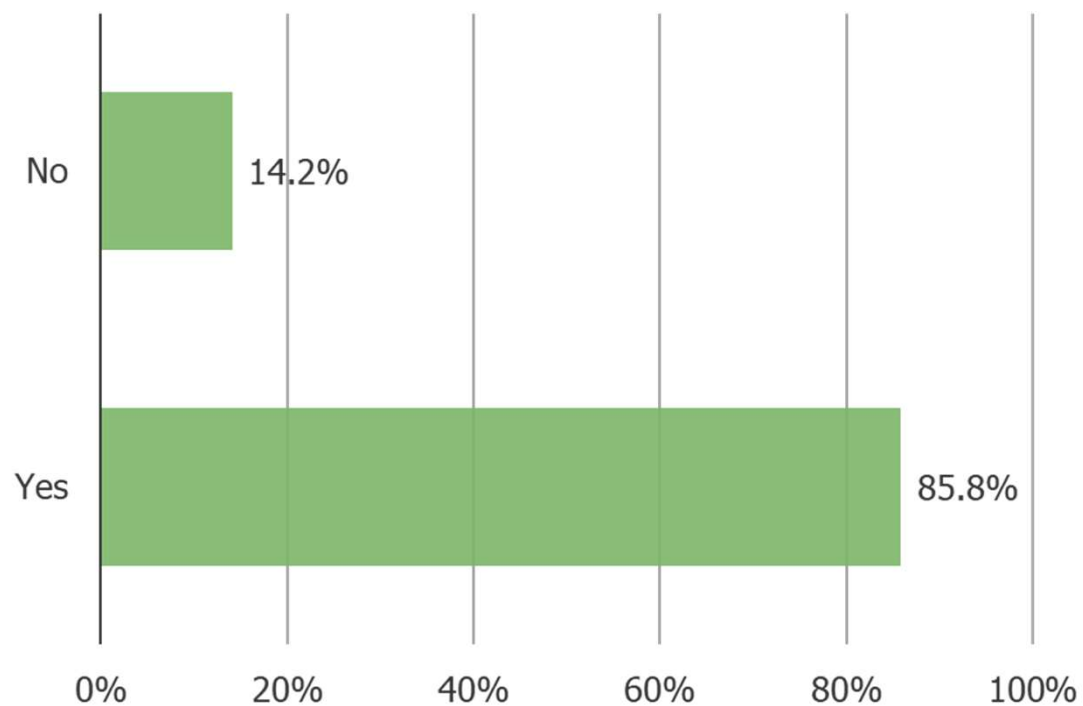
How did you learn about this offering?

Posed to individuals with diabetes who use or have used a DexCom device.

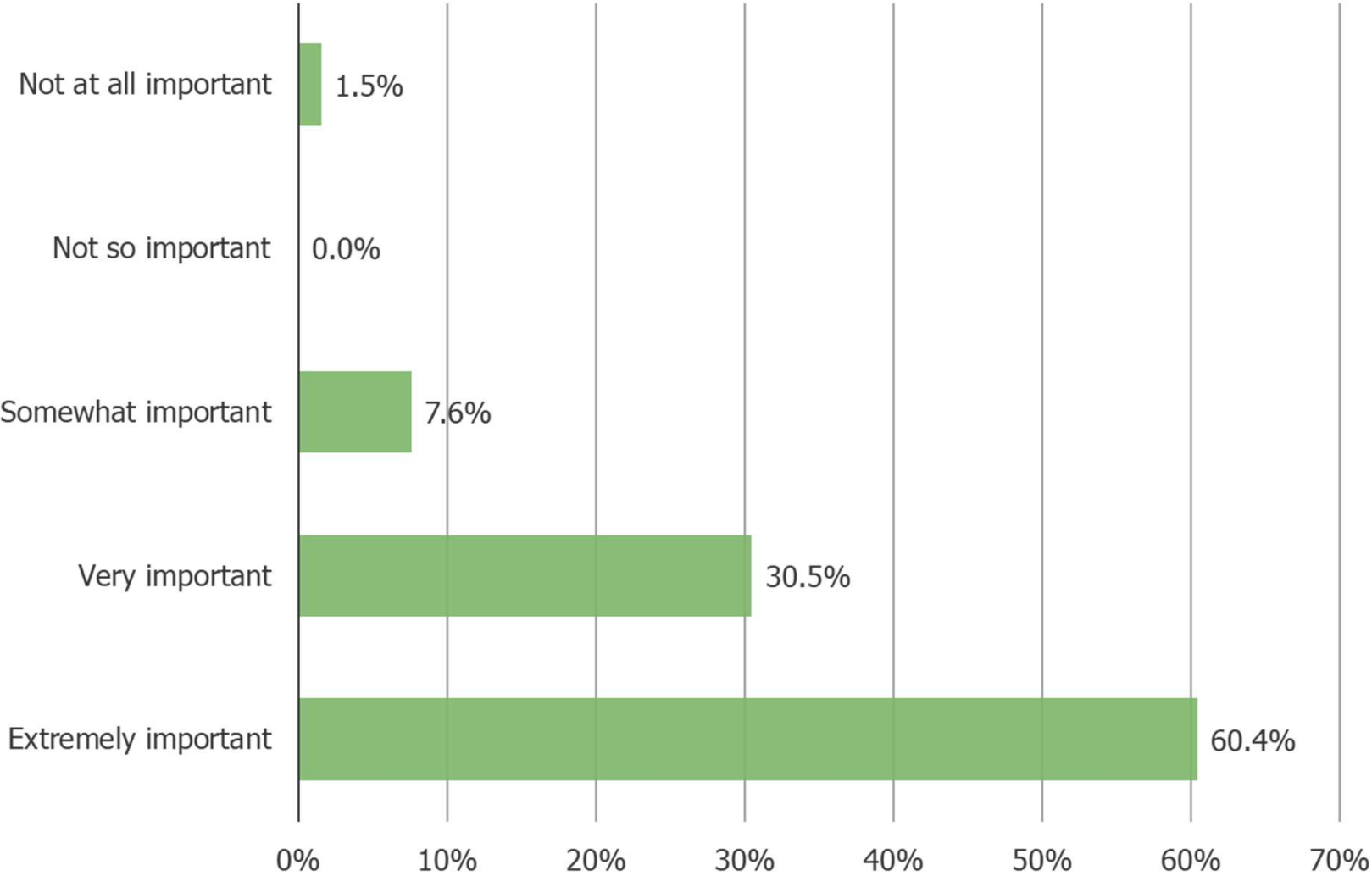


After your physician made his/her recommendation, did you do any additional research on the offering?

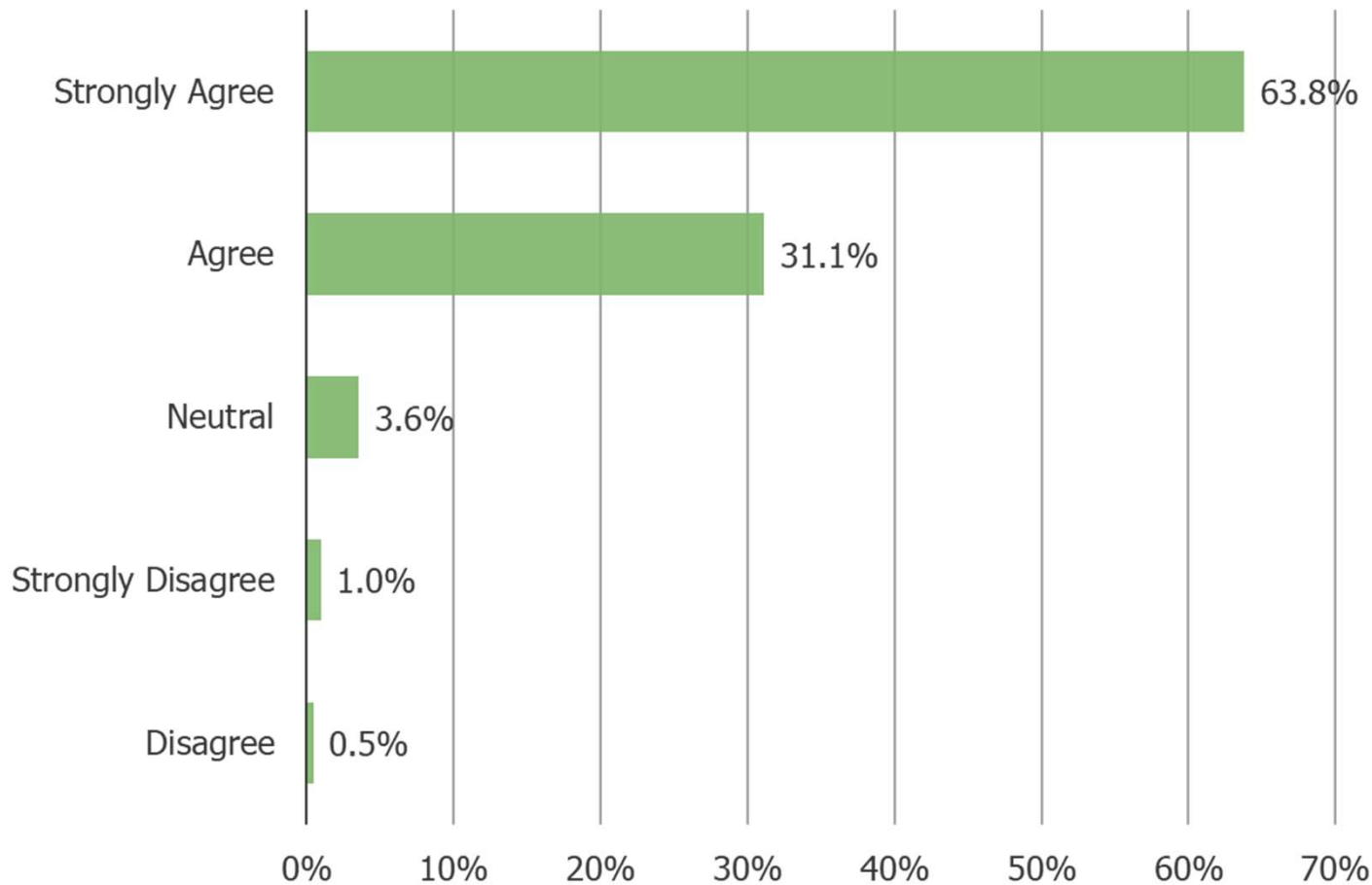
Posed to individuals with diabetes who use or have used a DexCom device.



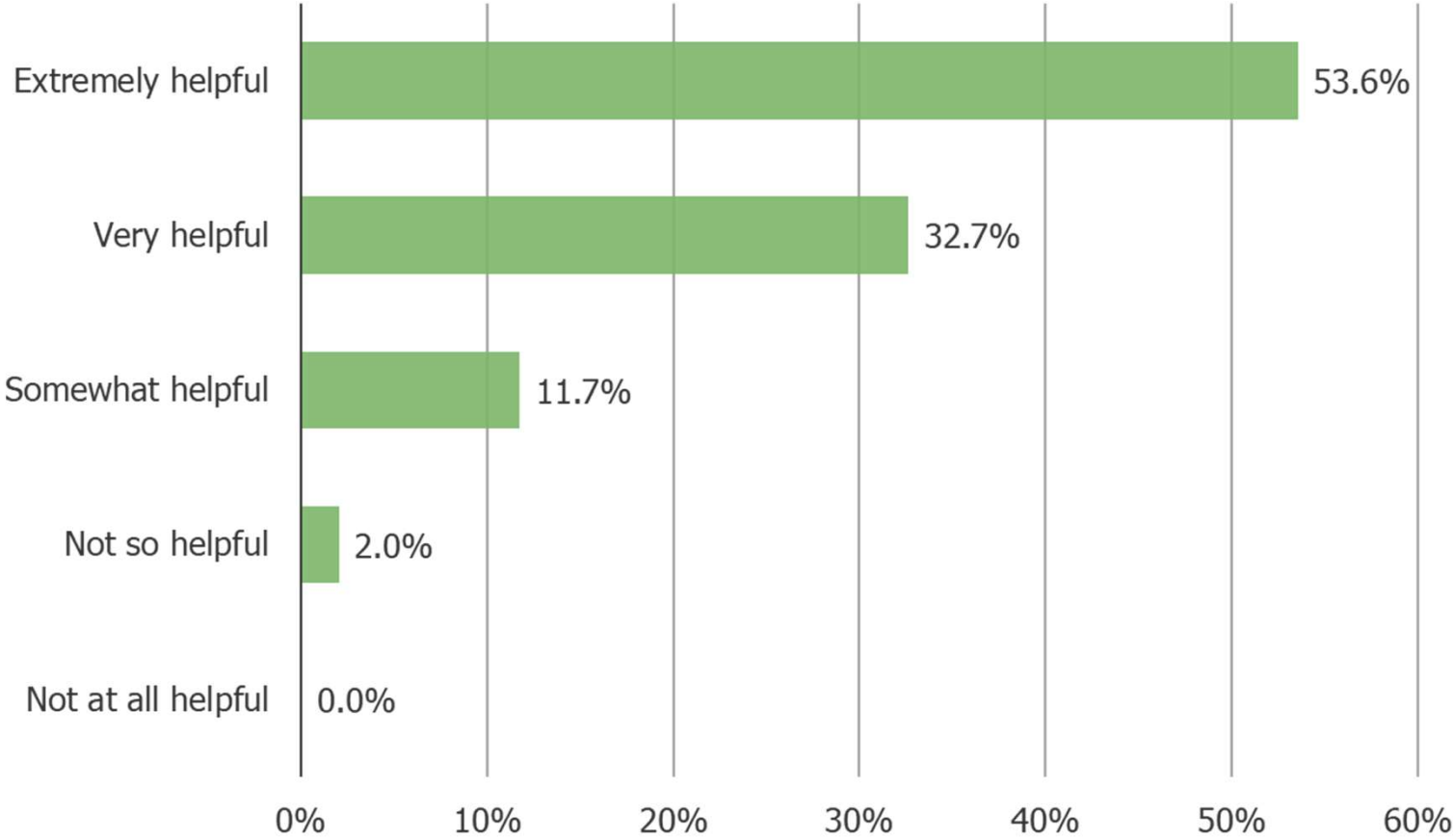
How important is it for you to be able to keep track and share long-term data with physicians and other parties?
Posed to individuals with diabetes who use a DexCom device.



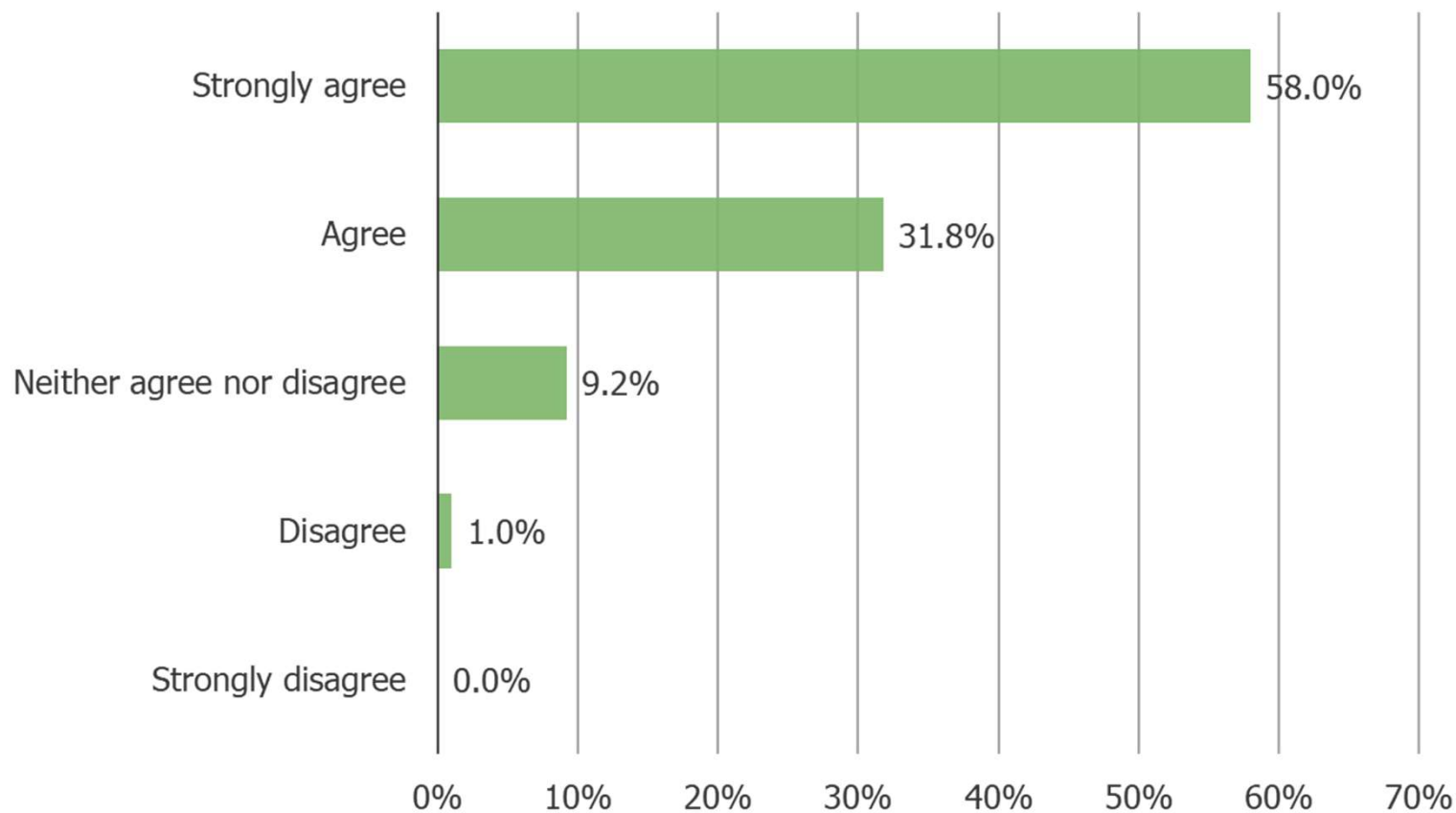
To what extent do you agree with the following: “Since I started using my DexCom device, I have made significant improvements in maintaining my blood glucose levels within the established normal range.”
Posed to individuals with diabetes who use a DexCom device.



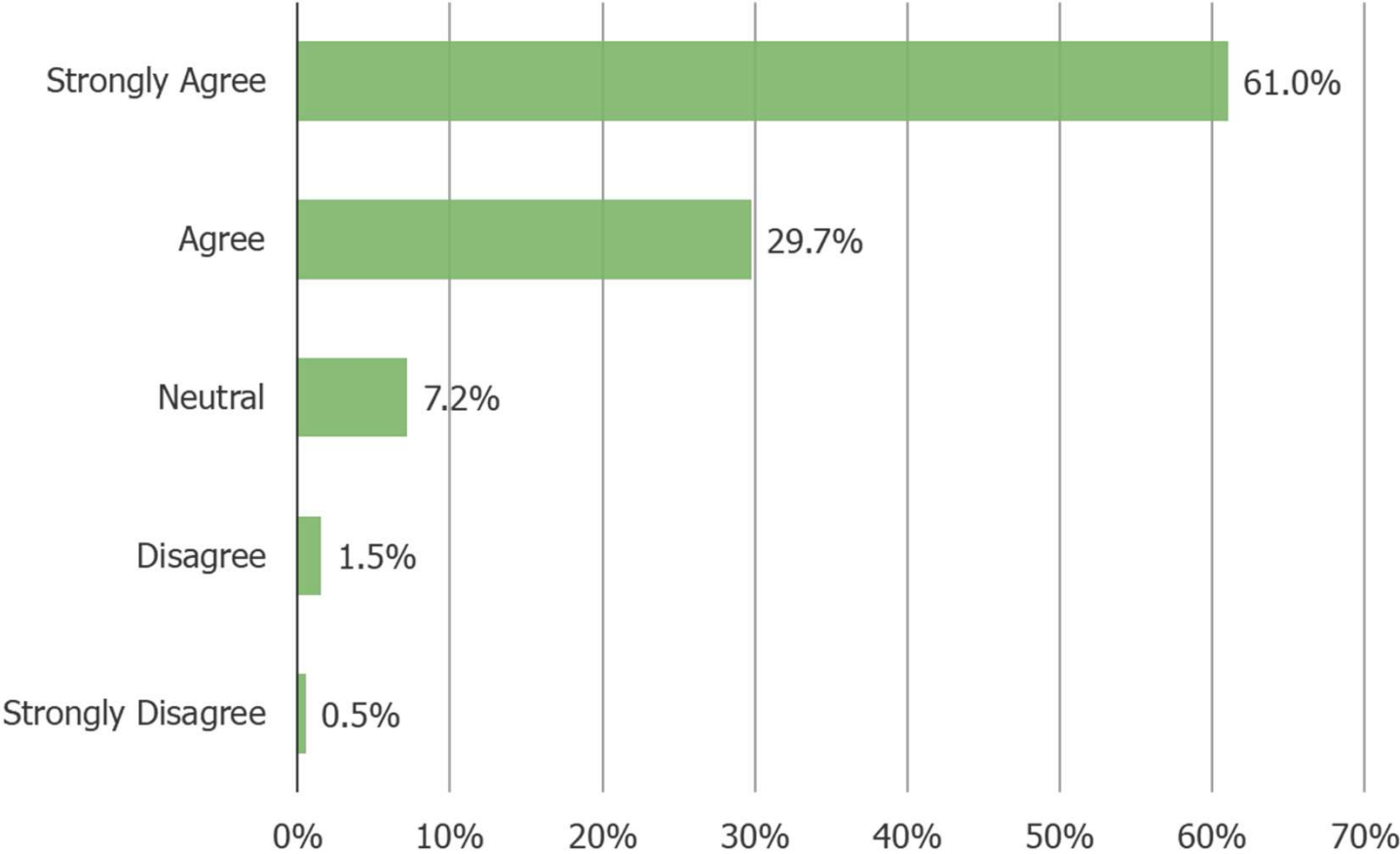
How helpful or useful are the alerts that you receive from your DexCom offering?
Posed to individuals with diabetes who use a DexCom device.



To what extent do you agree with the following: “Since I started using my DexCom device, I am more physically active/exercising more than I was before.”
Posed to individuals with diabetes who use a DexCom device.

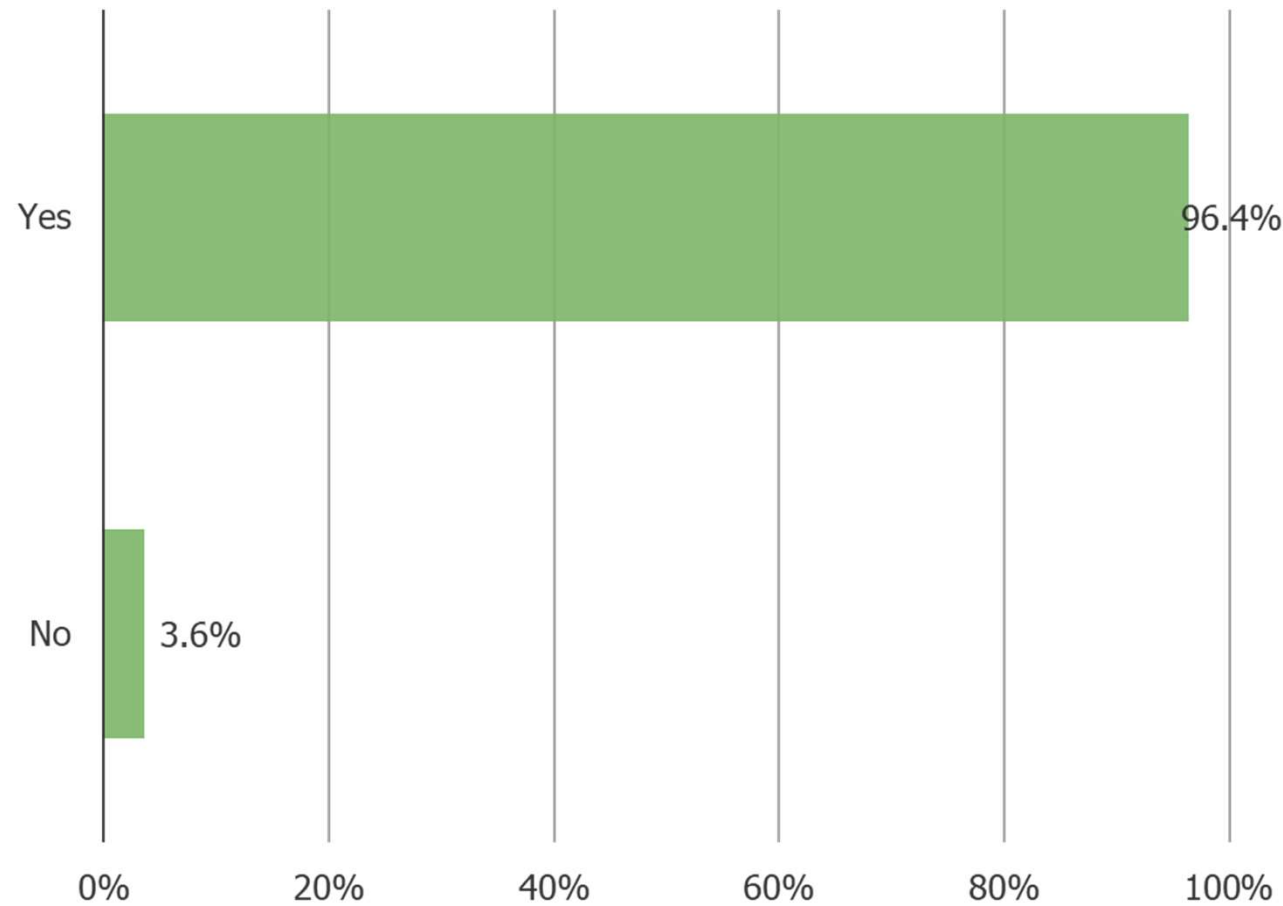


To what extent do you agree with the following: “Since I started using my DexCom device, my diet and nutrition has improved.”
Posed to individuals with diabetes who use a DexCom device.



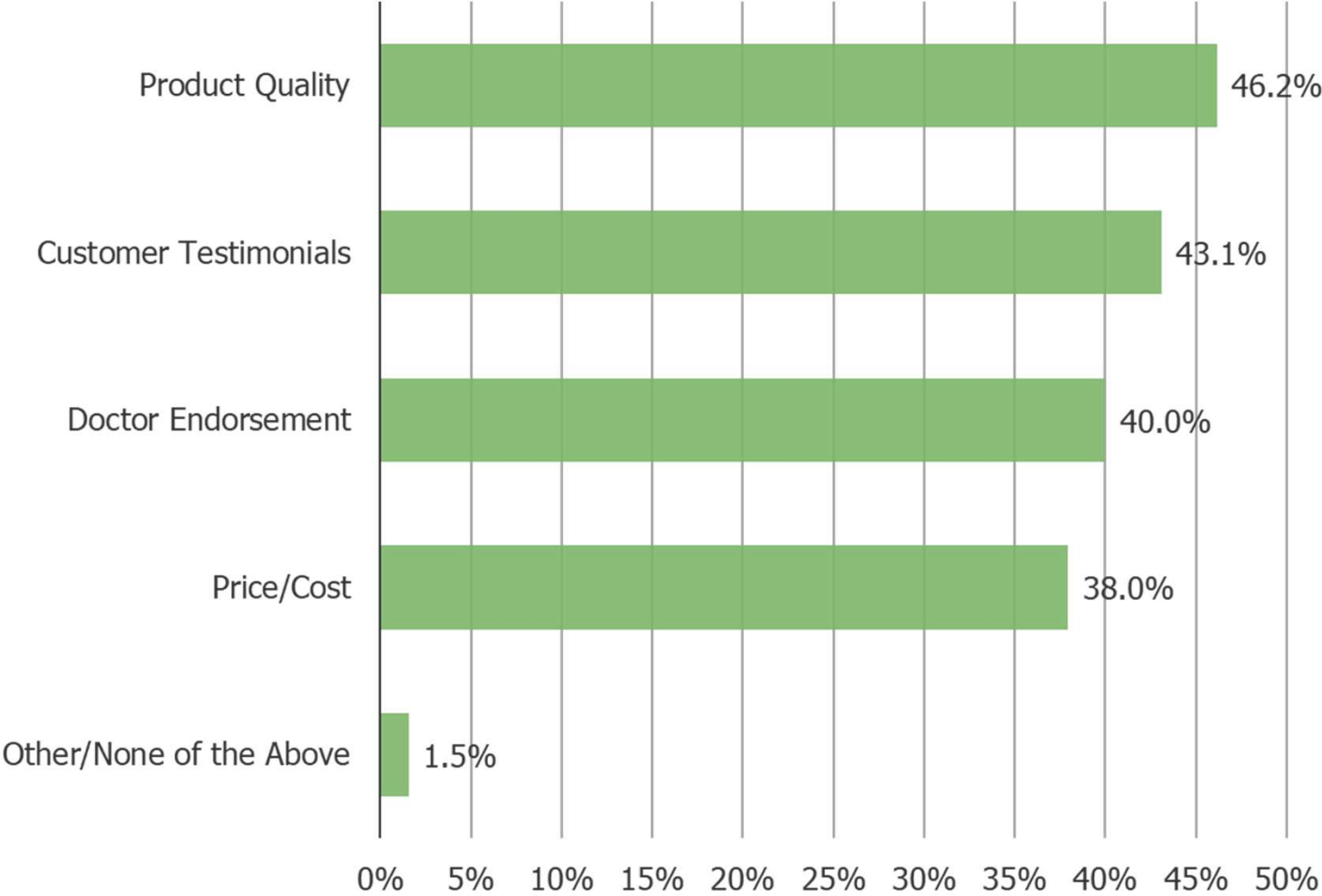
Would you recommend DexCom to your family and/or friends?

Posed to individuals with diabetes who use a DexCom device.



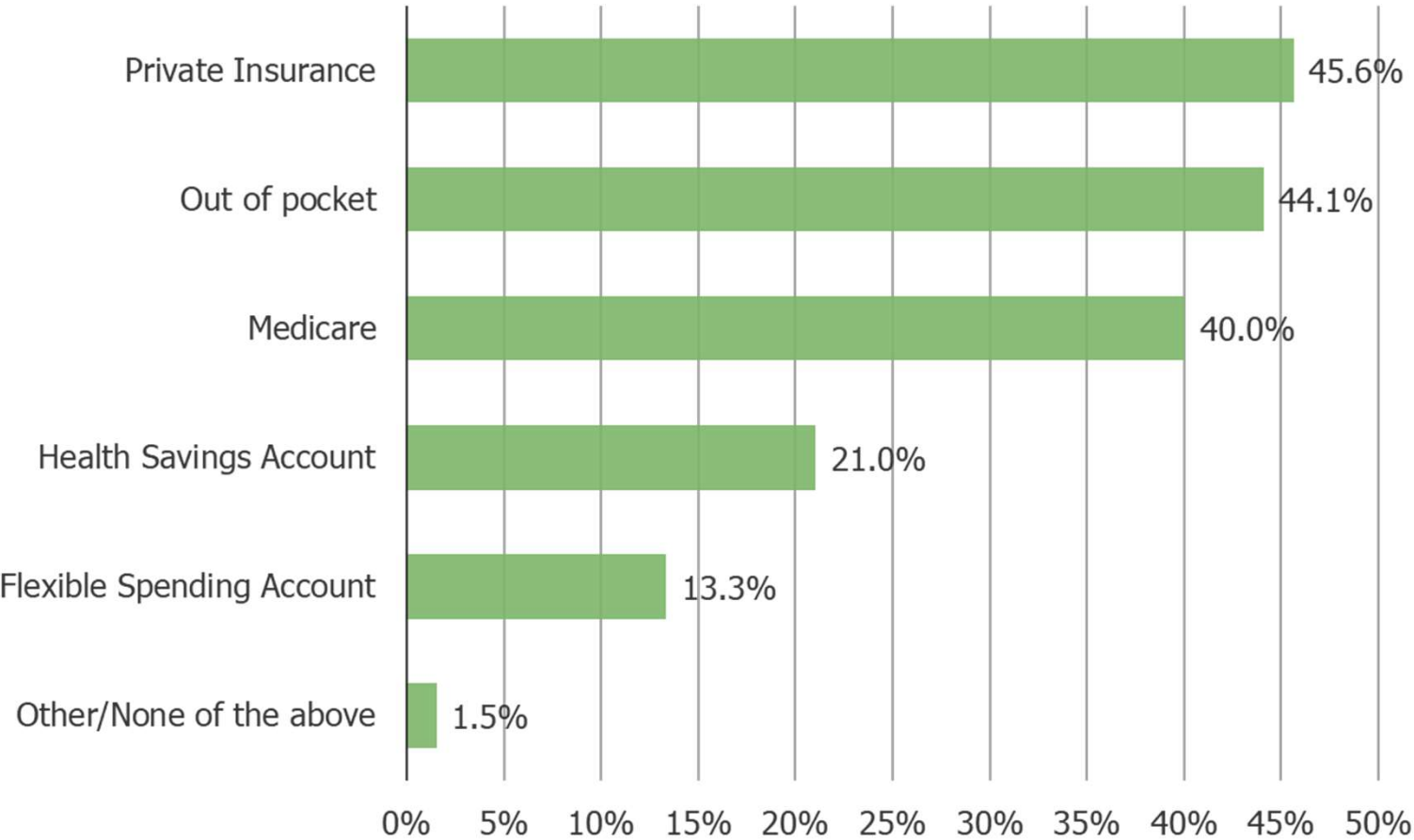
Why did you opt to become a DexCom member? (Select ALL that Apply)

Posed to individuals with diabetes who use a DexCom device.

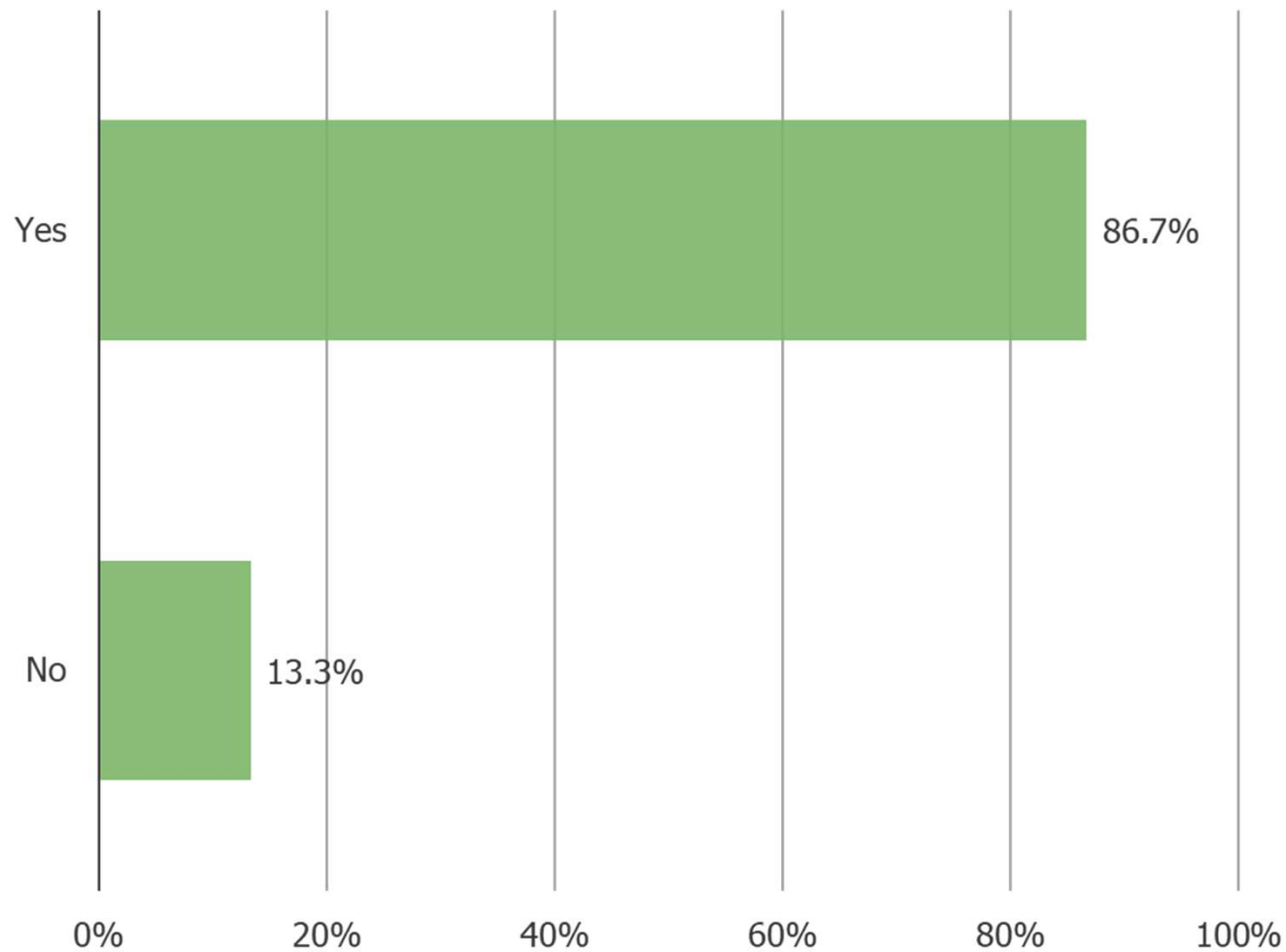


How did you finance your DexCom purchase? (Select ALL that Apply)

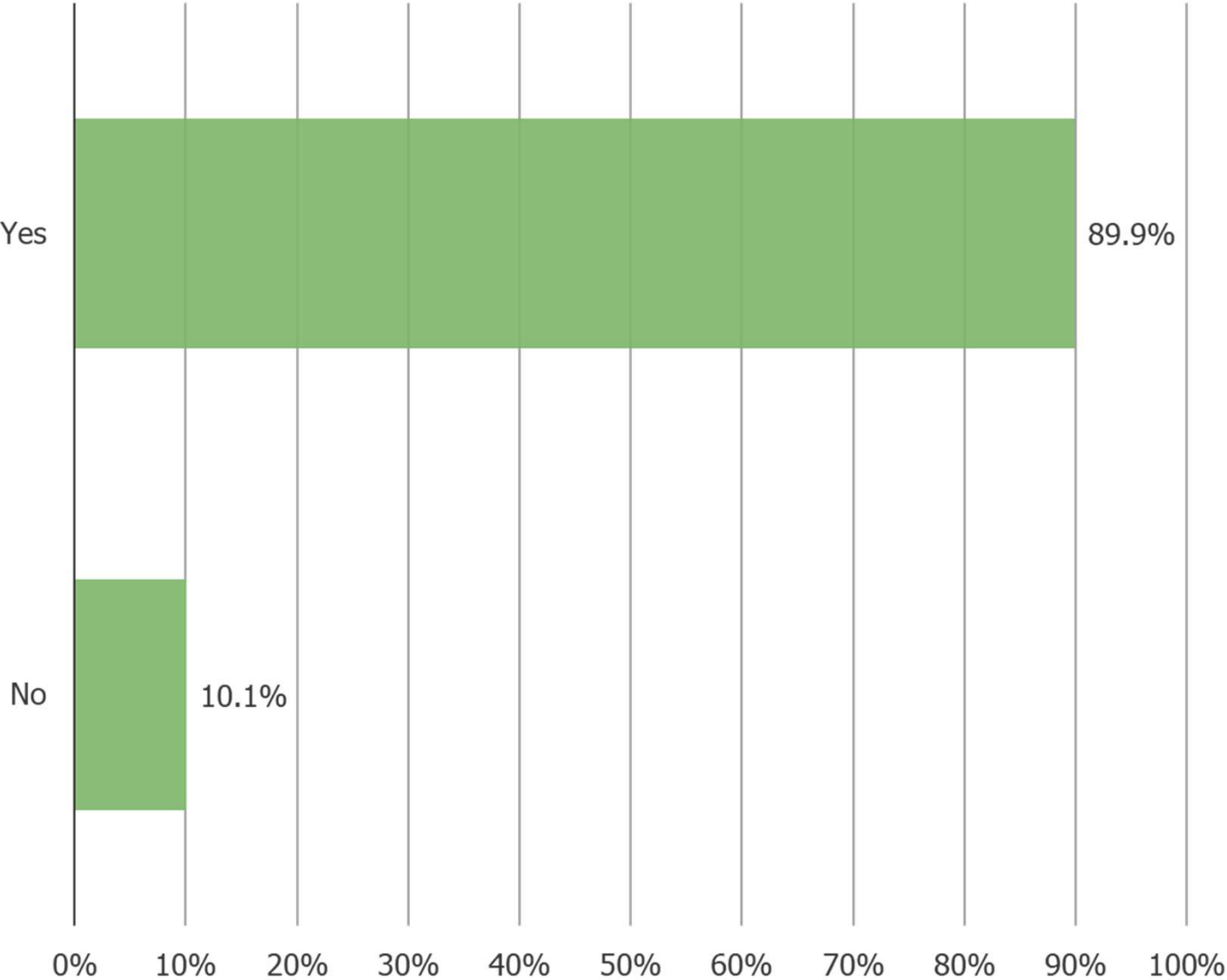
Posed to individuals with diabetes who use a DexCom device.



Are you familiar with Abbott’s Freestyle Libre 2.0 device?
Posed to individuals with diabetes who use a DexCom device.

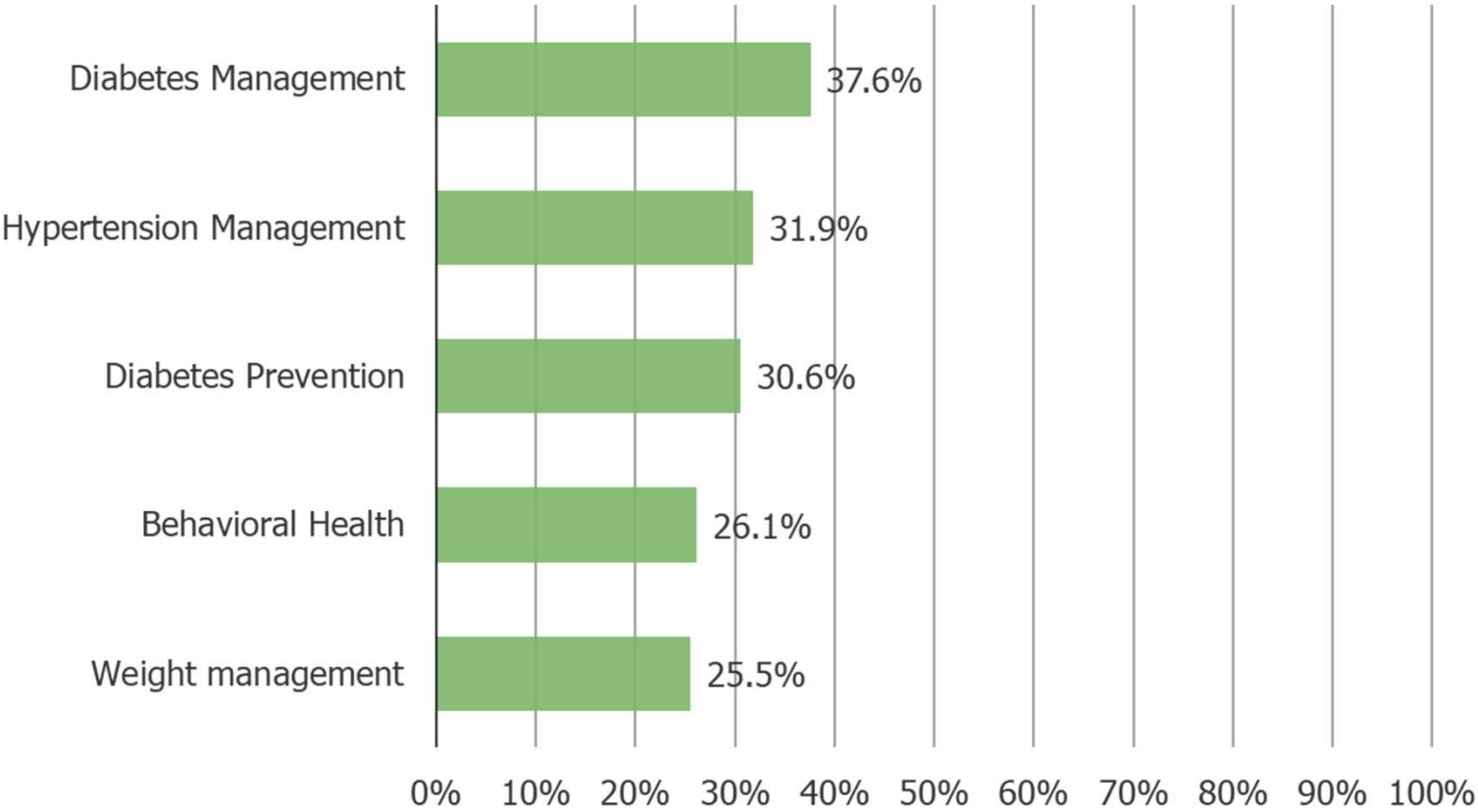


Do you consider it equivalent to DexCom G6 offering?
Posed to individuals with diabetes who use a DexCom device.



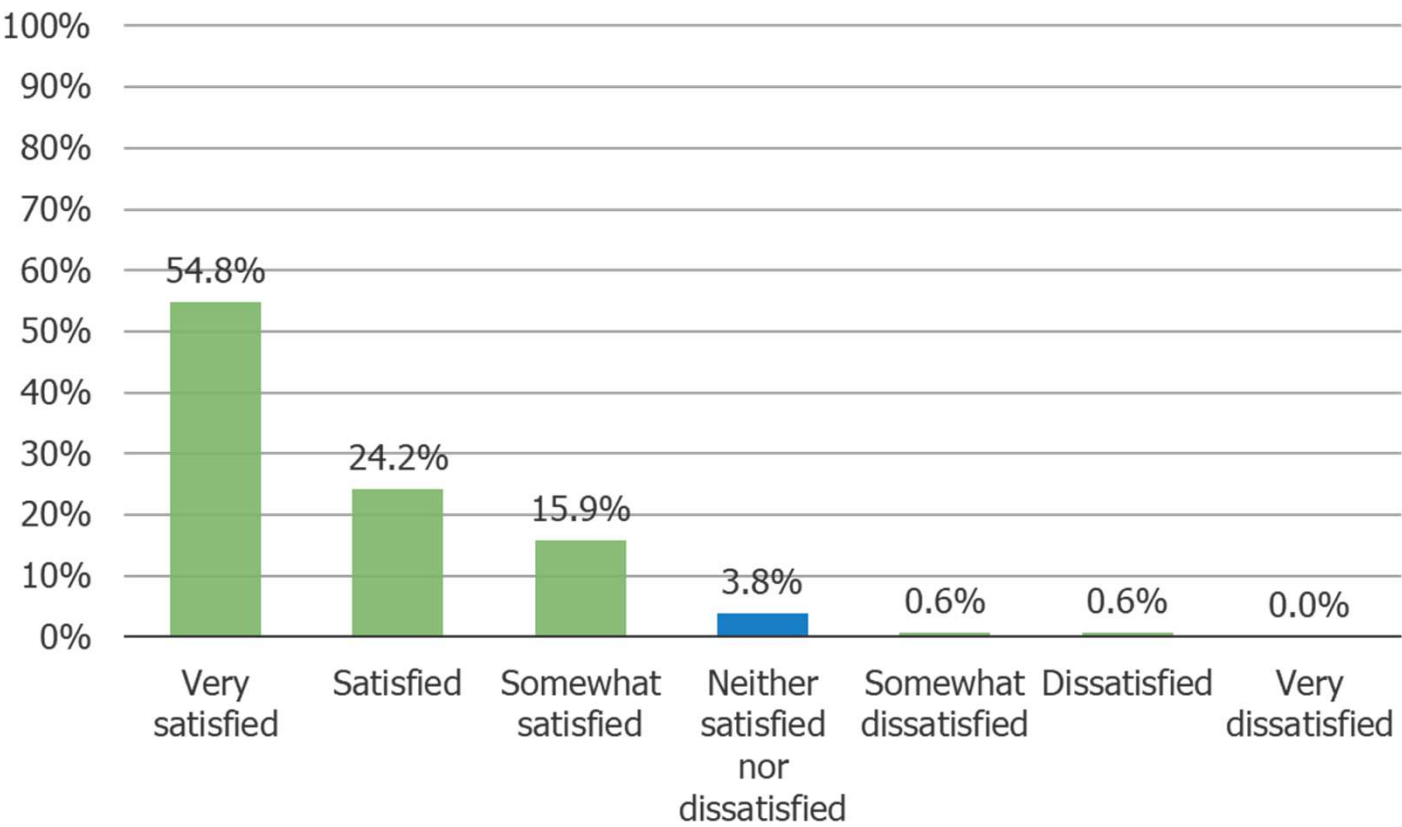
What do you primarily use Livongo for?

Posed to current Livongo members.

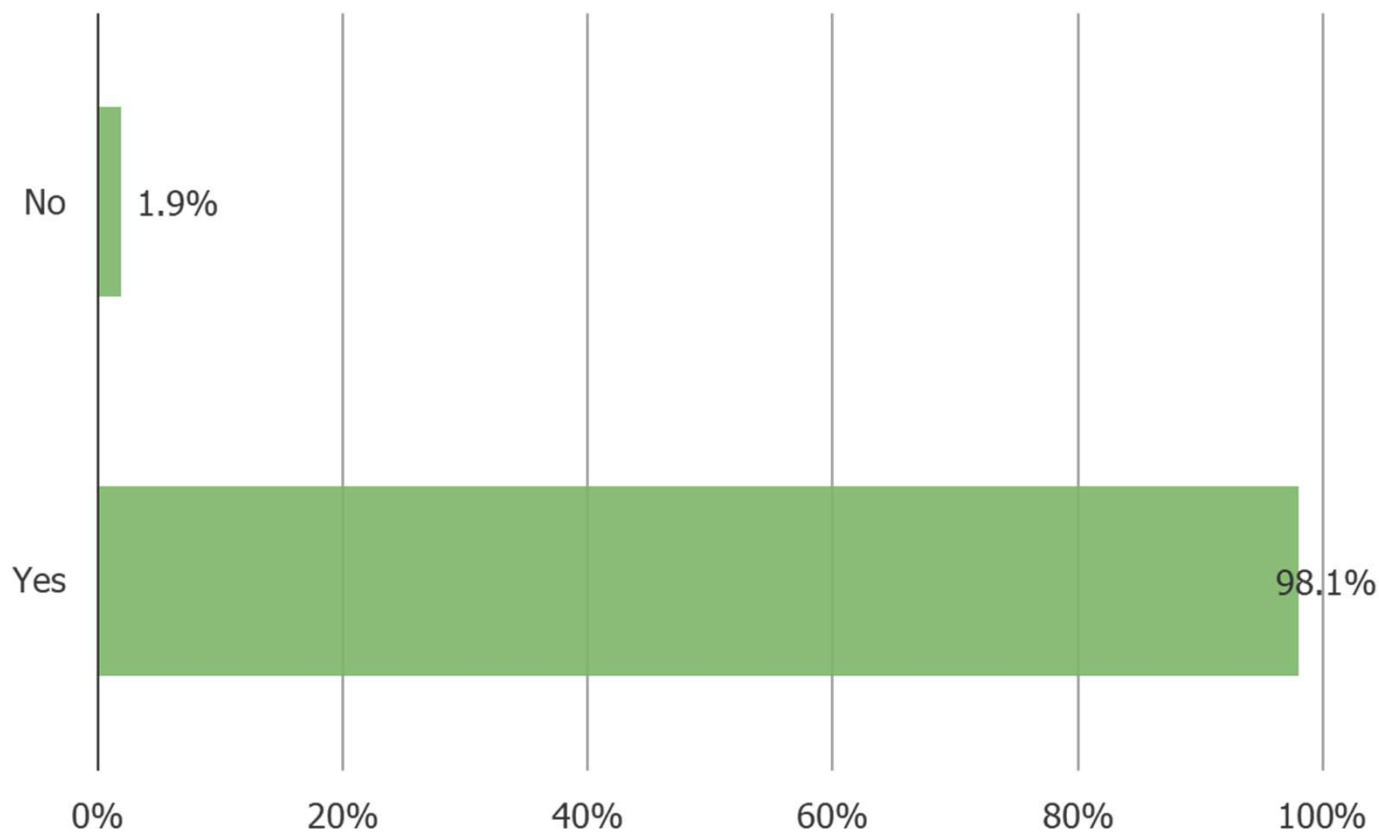


How satisfied are/were you with your experience?

Posed to current Livongo members.

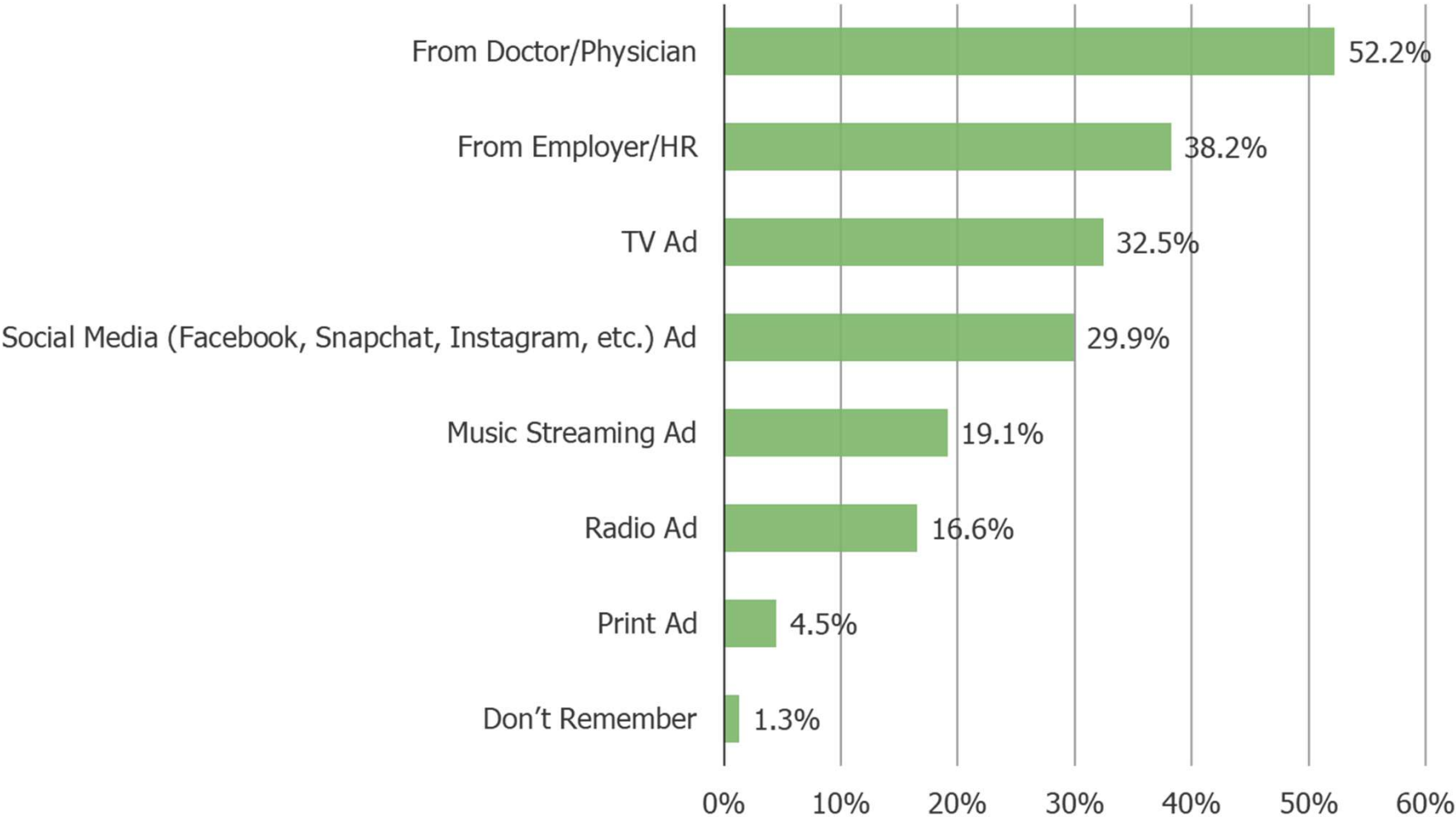


Would you recommend Livongo to your family and/or friends?
Posed to current Livongo members.



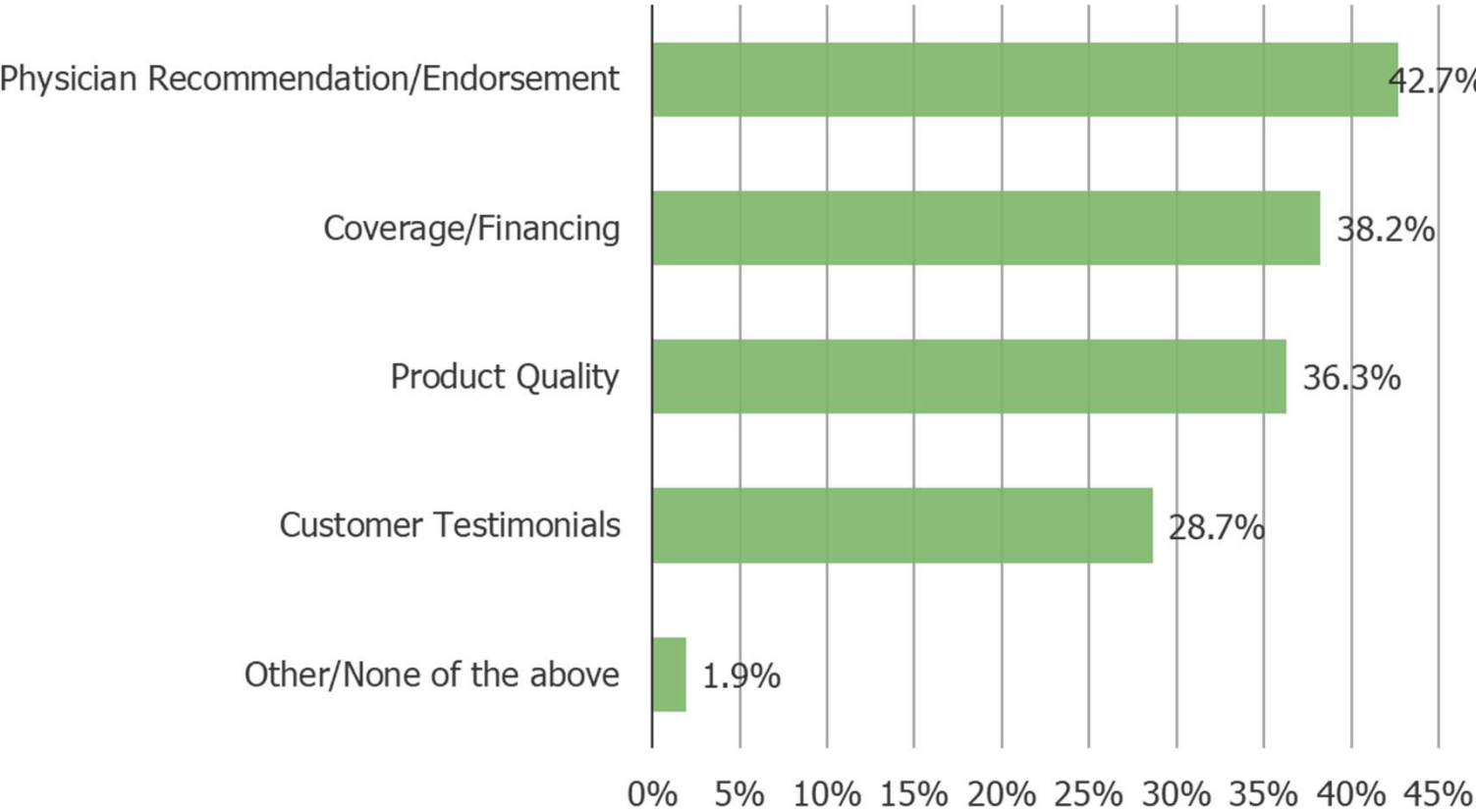
How did you first hear about Livongo?

Posed to current Livongo members.



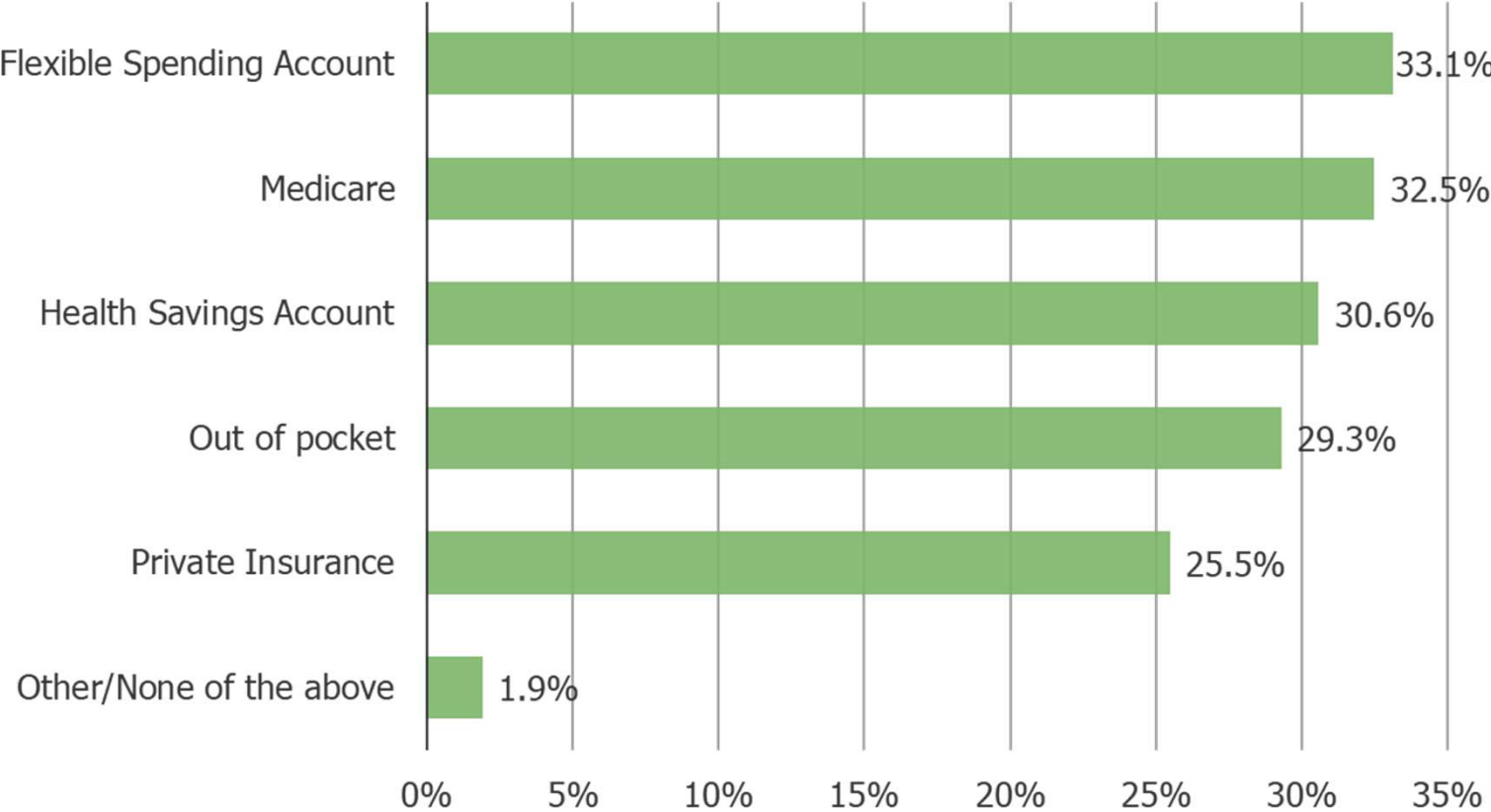
Why did you opt to become a Livongo customer/member? (Select ALL that Apply)

Posed to current Livongo members.

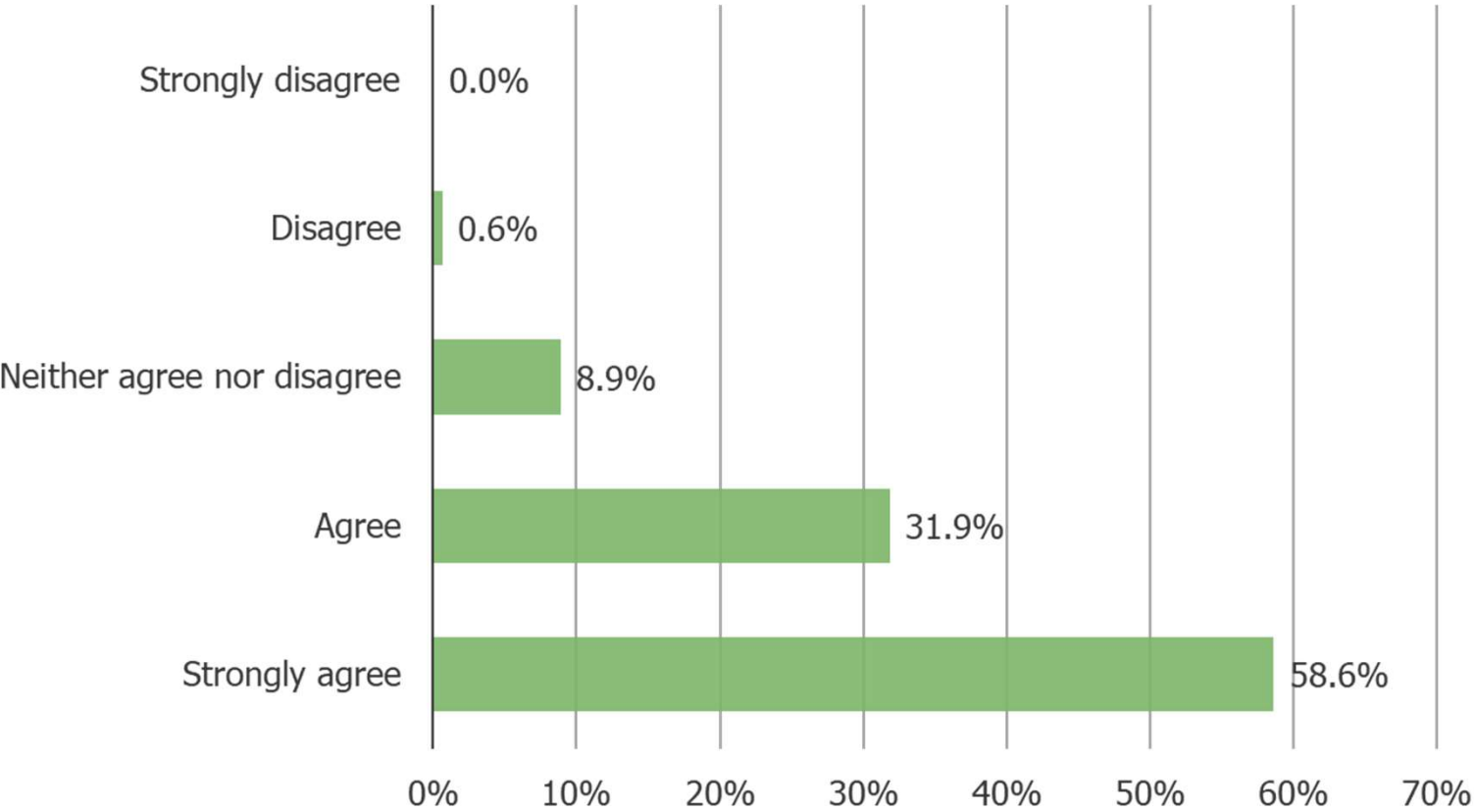


How did you finance/pay for your Livongo purchase? (Select ALL that Apply)

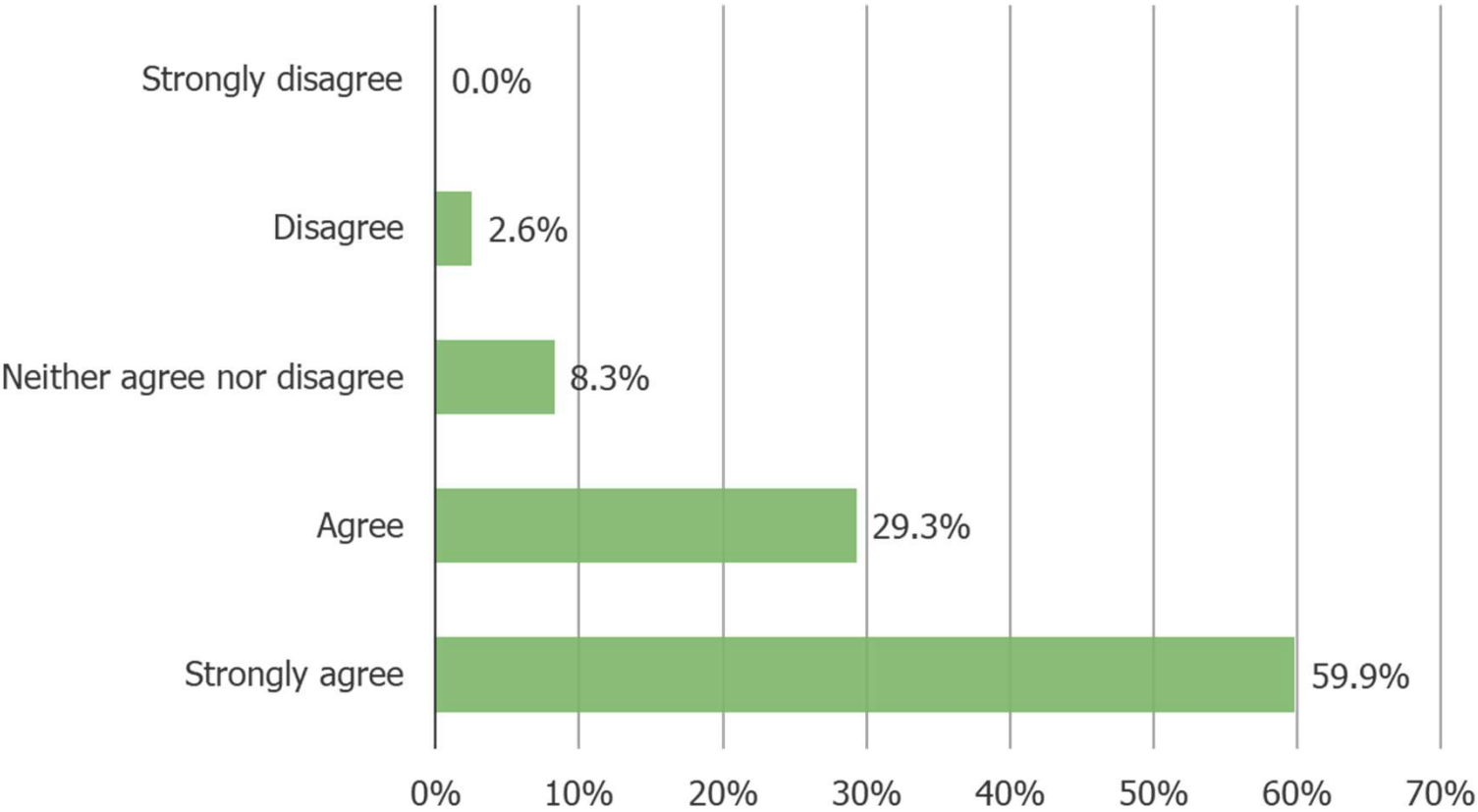
Posed to current Livongo members.



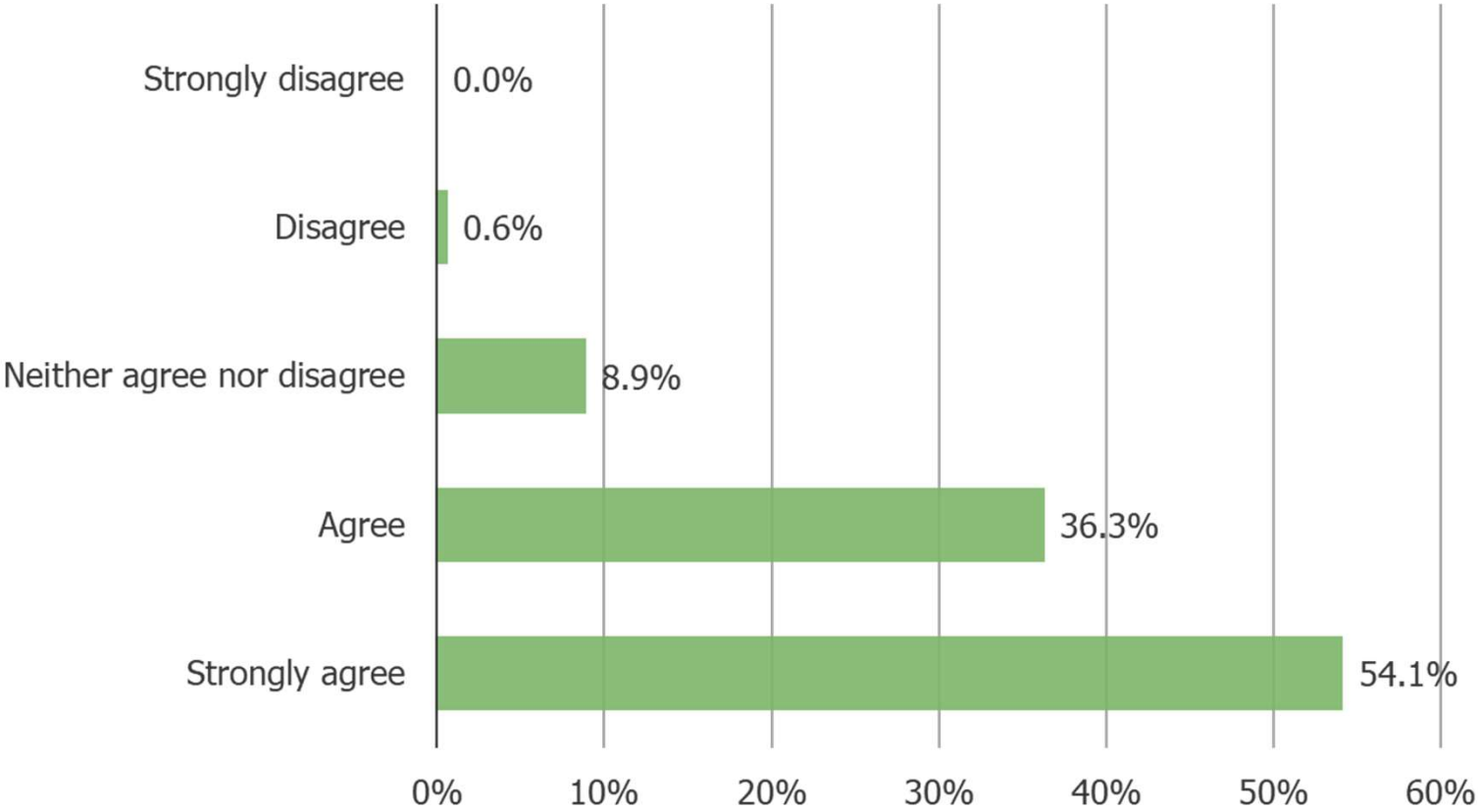
To what extent do you agree with the following: “Since I became a Livongo member, I have made significant improvements in the management of my chronic condition.”
Posed to current Livongo members.



To what extent do you agree with the following: “Since I became a Livongo member, I am more physically active/exercising more than I was before.”
Posed to current Livongo members.

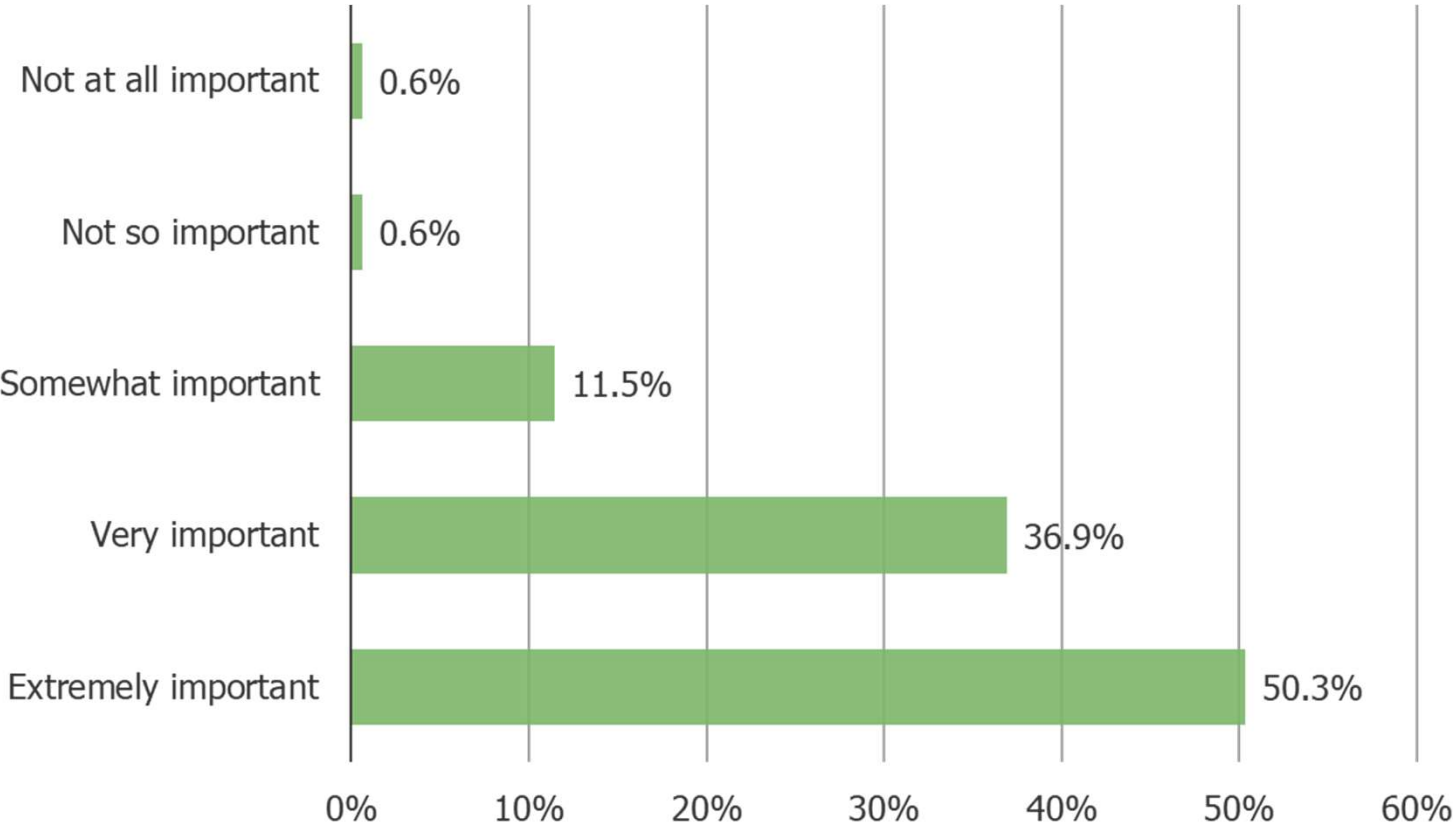


To what extent do you agree with the following: “Since I became a Livongo member, my diet and nutrition has improved relative to before I became a member.”
Posed to current Livongo members.



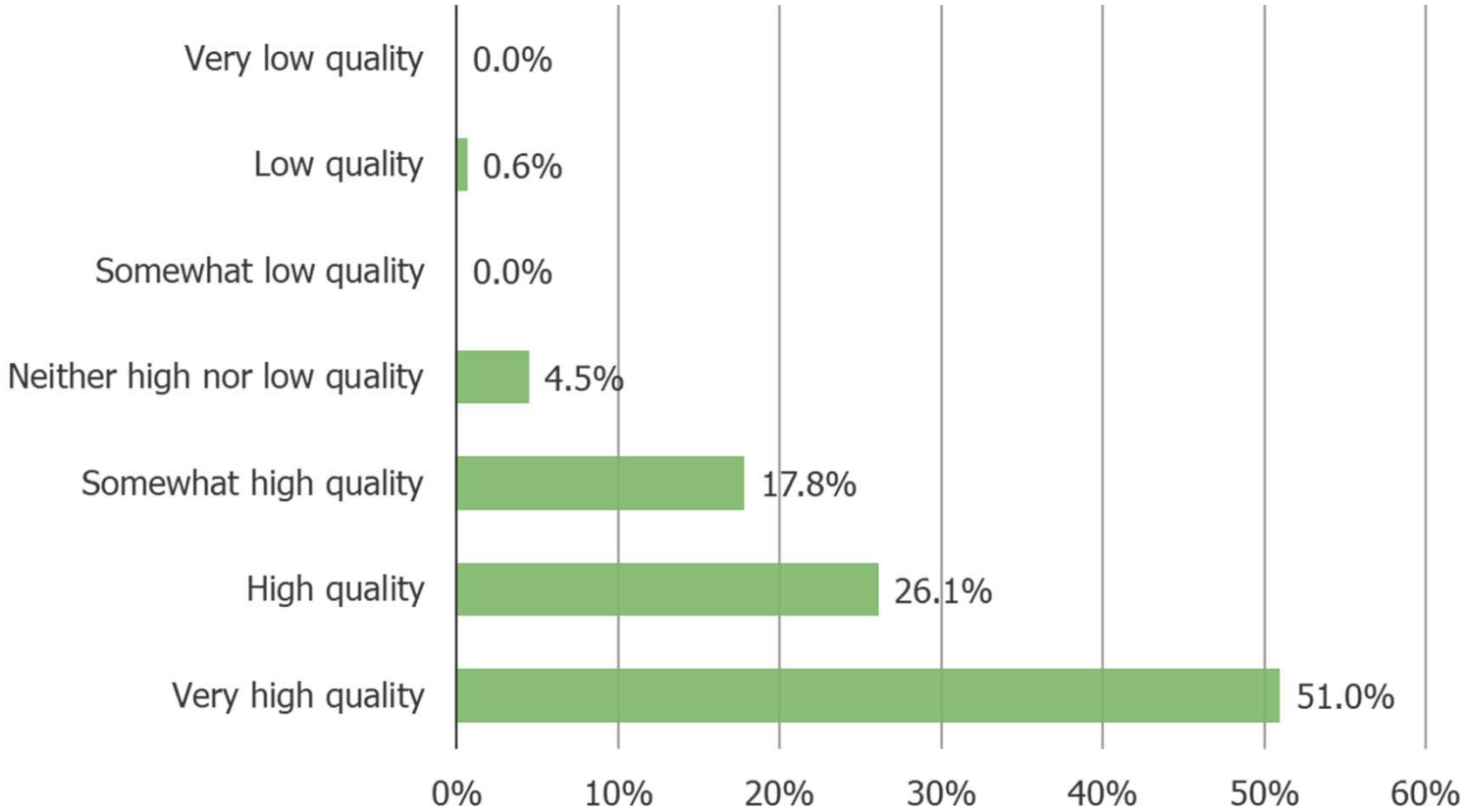
How critical is it for you to have 24x7x365 access to healthcare professionals via Livongo?

Posed to current Livongo members.

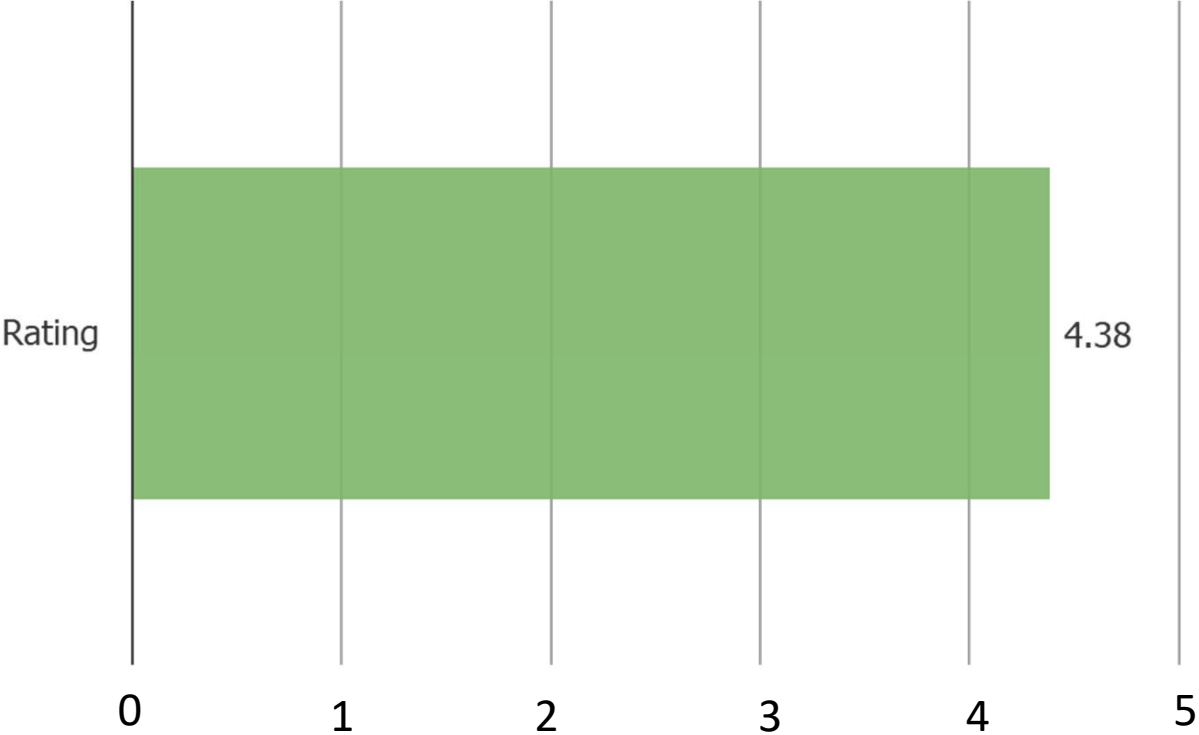


How would you rate the quality of Livongo devices?

Posed to current Livongo members.

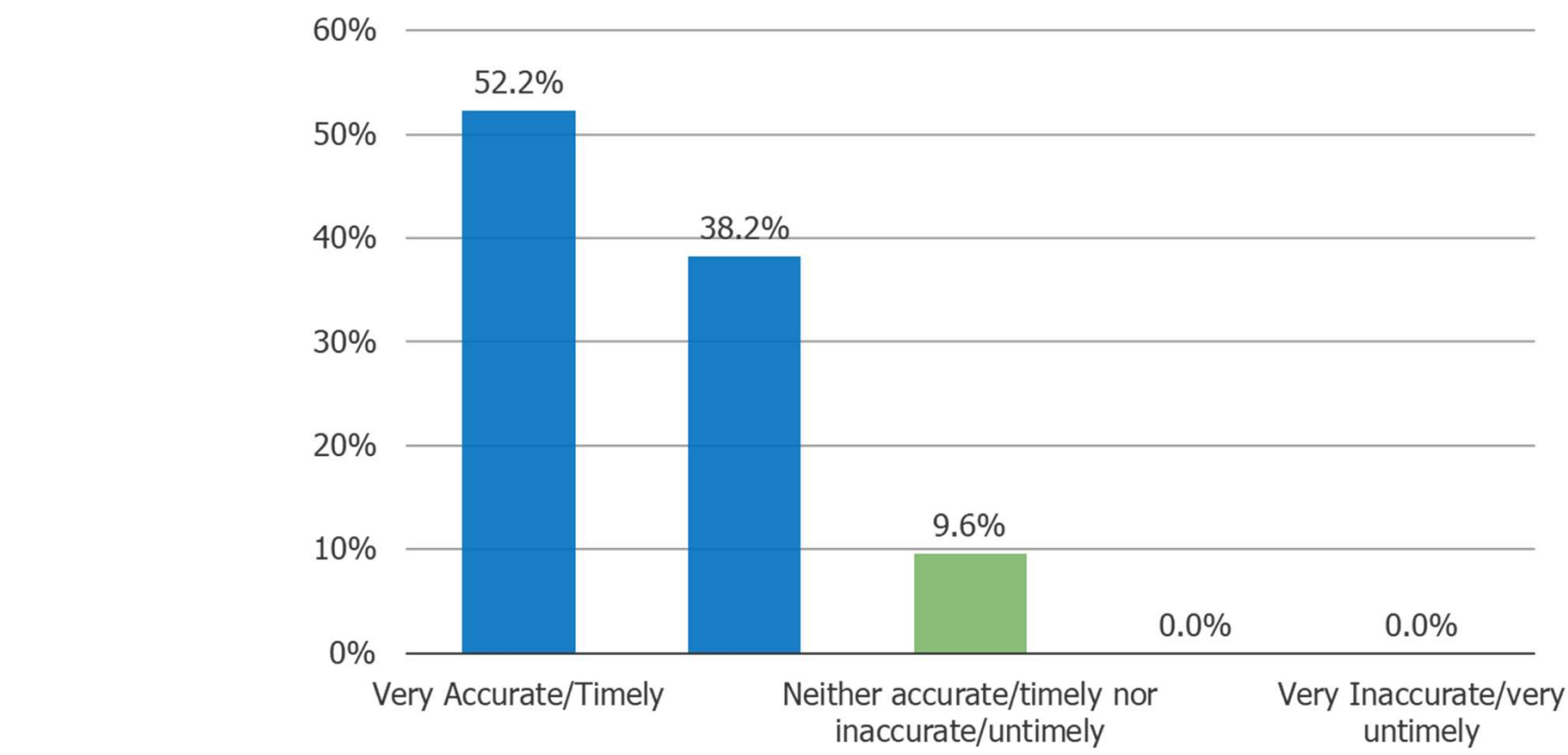


How would you rate the quality of Livongo's real-time support and expert coaching?
Posed to current Livongo members.

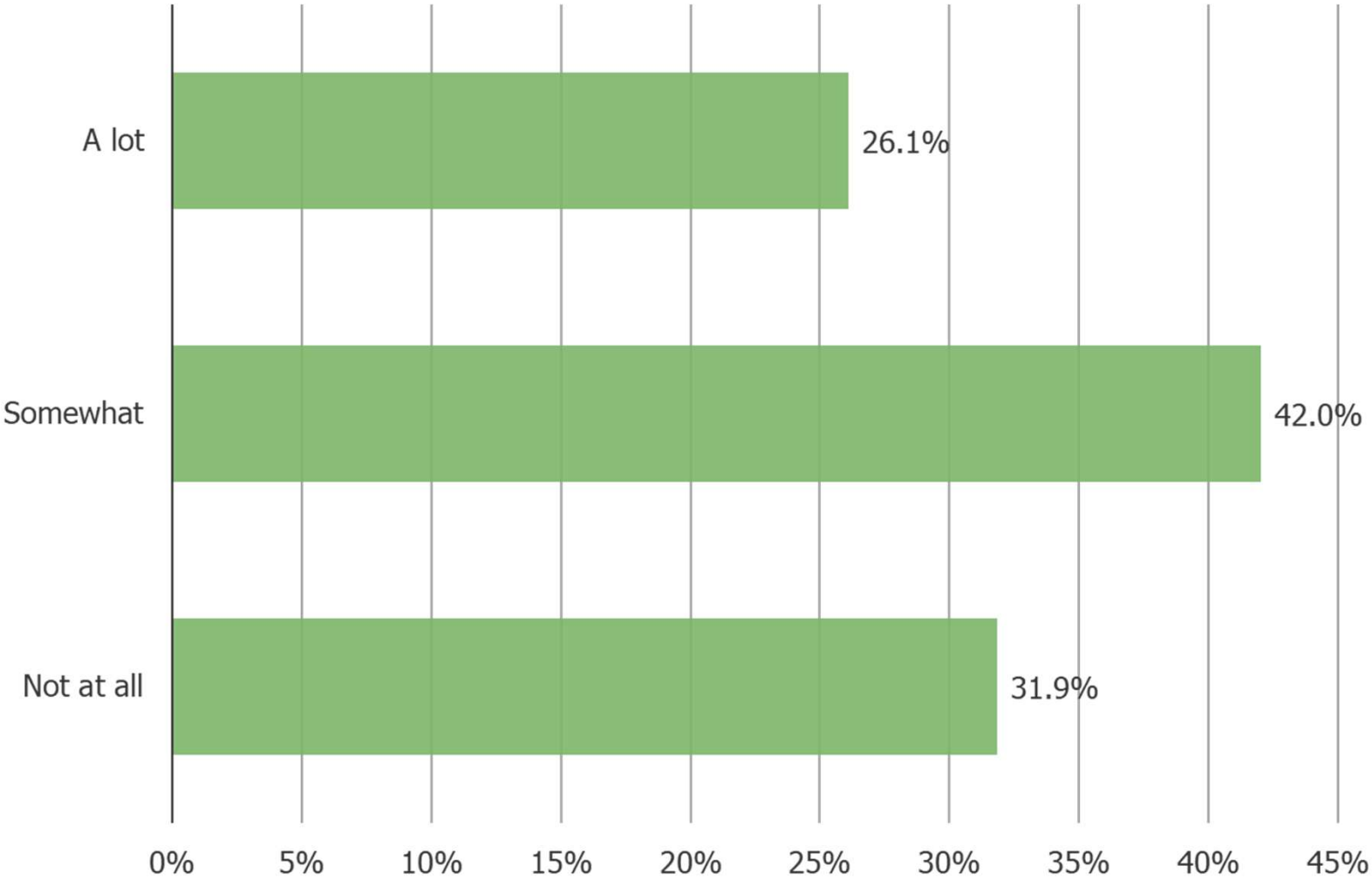


How accurate and timely are Livongo’s signals and nudges in your view?

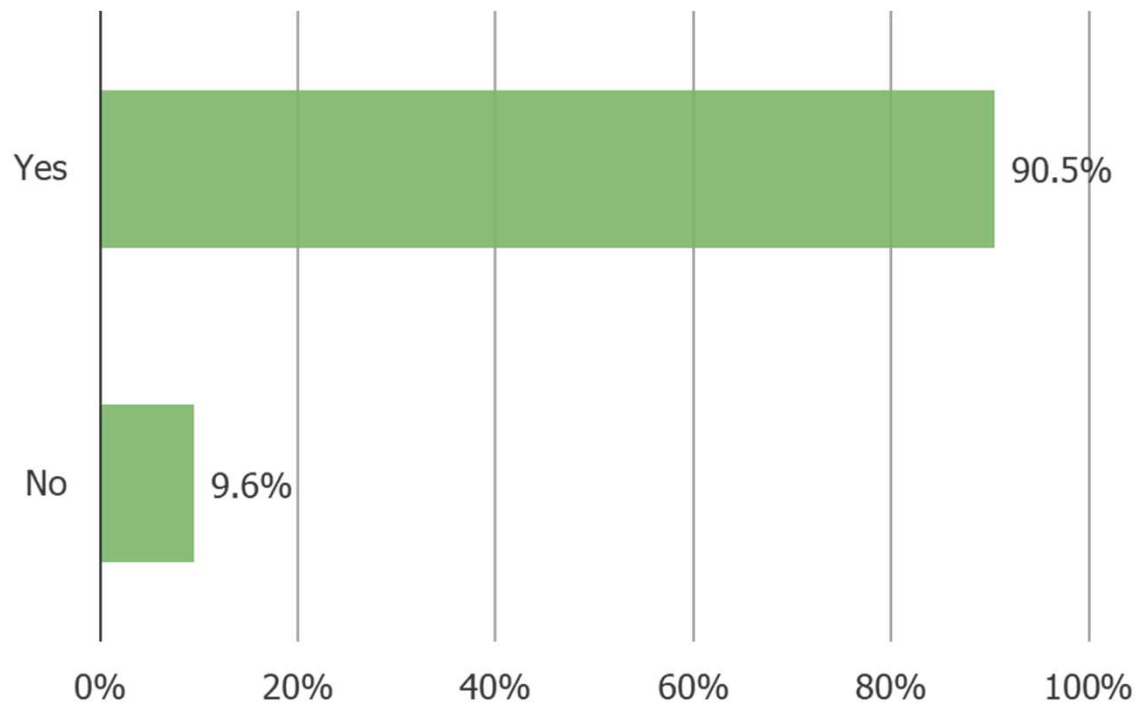
Posed to current Livongo members.



To what extent have the health nudges and personalized insights altered your day to day behavior?
Posed to current Livongo members.

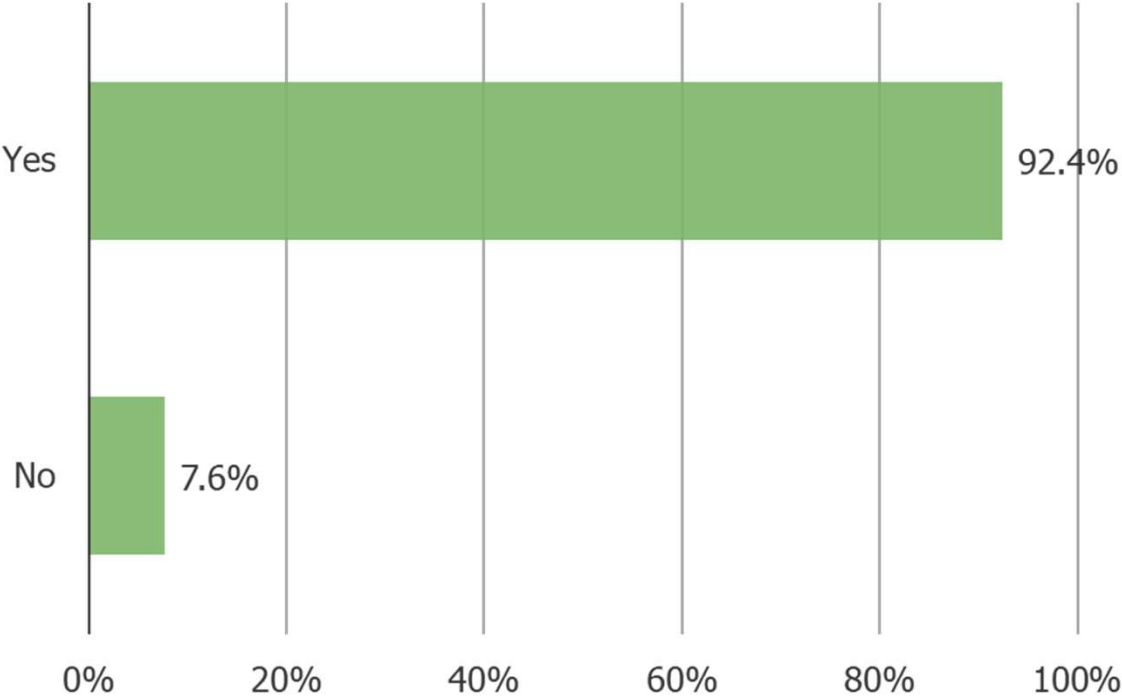


By your estimation, do you feel happier, less alone, and/or disconnected since you started your Livongo program?
Posed to current Livongo members.

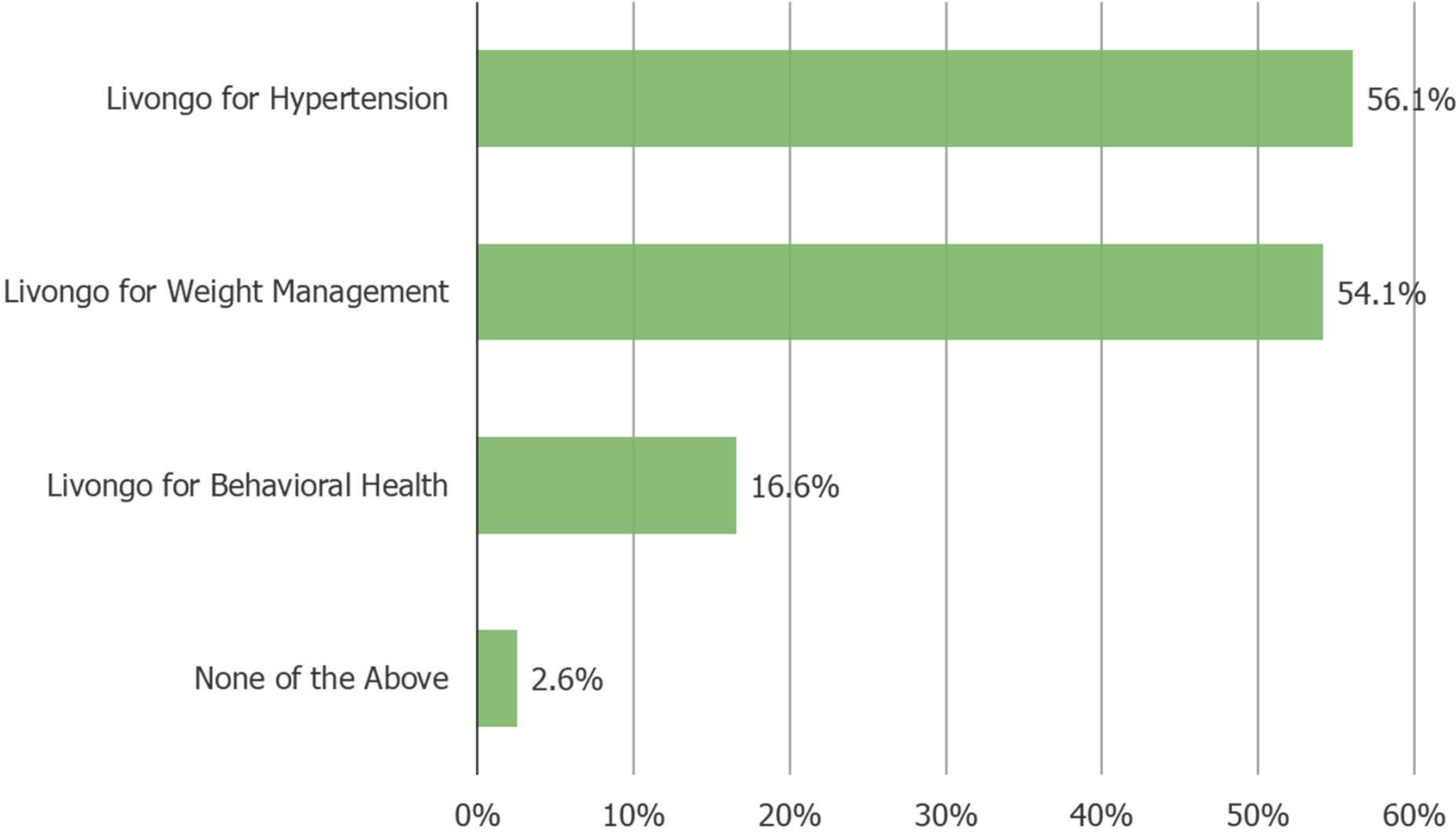


Are you sharing your Livongo derived data with your physician?

Posed to current Livongo members.

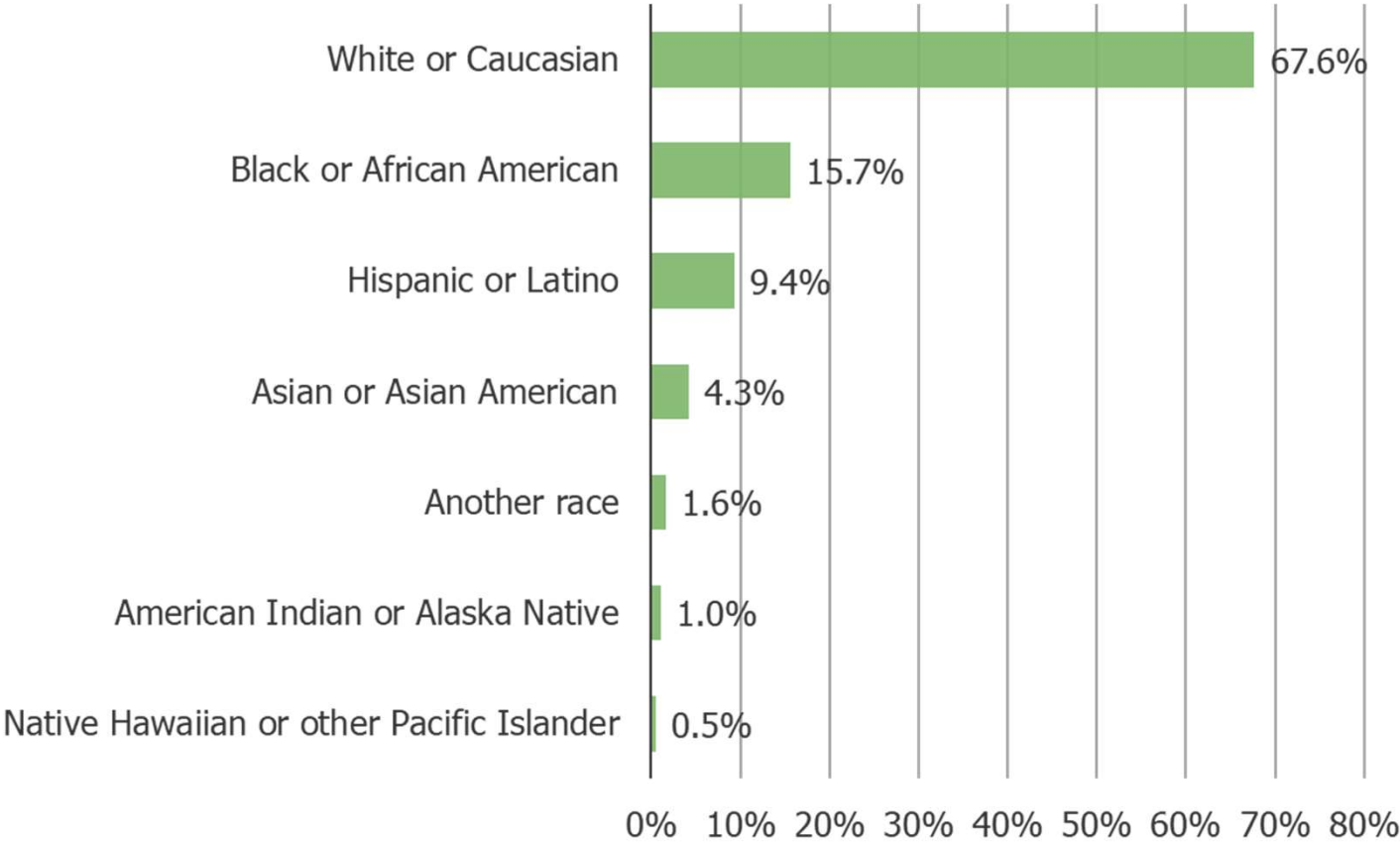


Are you at all interested in the Livongo solutions/programs listed below?
Posed to current Livongo members.



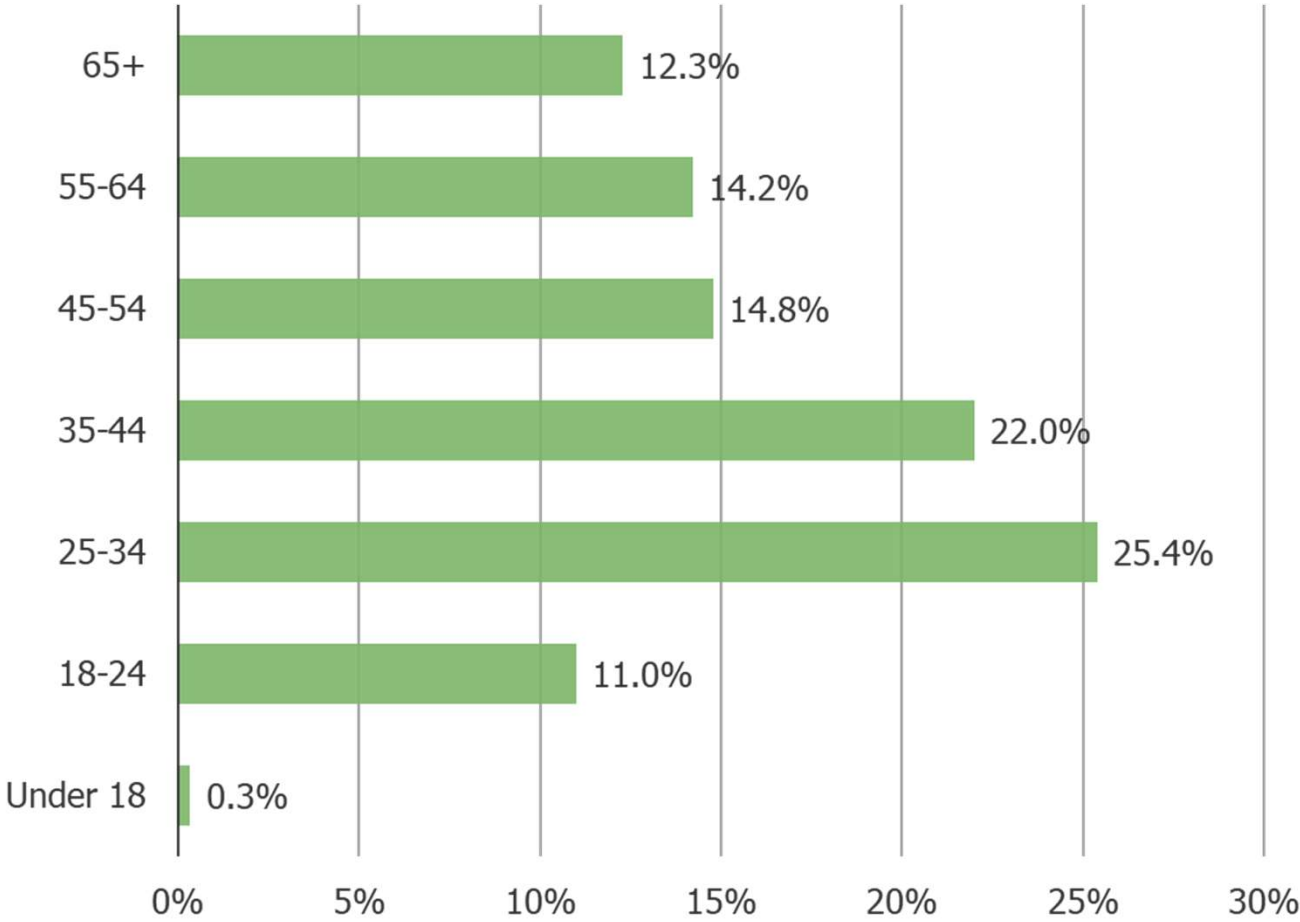
What is your ethnicity?

Posed to all respondents.



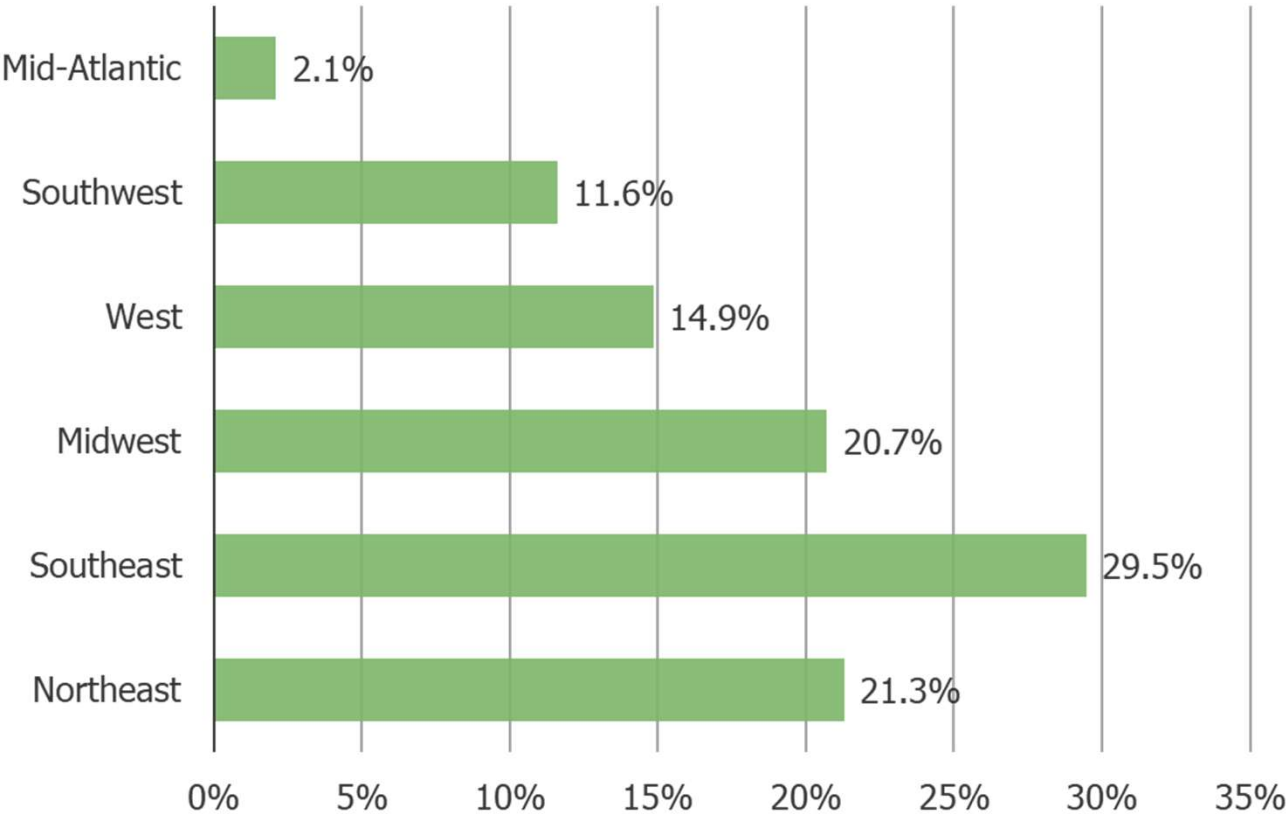
What is your age?

Posed to all respondents.



In what region of the country do you currently reside?

Posed to all respondents.



What is your annual household income?

Posed to all respondents.

