



MEMORANDUM

**J&J LifeScan's OneTouch Reveal app for VerioSync meter adds Apple HealthKit compatibility; what app is leading the pack? - November 13, 2015**

**Executive Highlights**

- Yesterday, J&J/LifeScan [announced](#) that the OneTouch VerioSync meter's paired [Reveal app](#) will now post data to Apple's HealthKit. This responds to critical user feedback; marks the first Big 4 connected meter to post data to Apple Health; and will allow other apps to integrate the data on Apple devices. We're very excited to see this.
- We are huge fans of connected devices, but the caveat is the accompanying rise in patient expectations - the user experience expectation is "world class", and early adopters tend to grade medical device apps in a challenging way that reflects very high expectations. [Medtronic's MiniMed Connect app](#) has launched to stronger reviews than other connected glucose monitoring apps on the iPhone.

Yesterday, J&J/LifeScan [announced](#) that the OneTouch VerioSync meter's paired [Reveal app](#) will now post data to Apple's HealthKit. The news is important for three reasons: (i) it shows LifeScan responding to user feedback, as this was a very common criticism in app store reviews; (ii) it marks the first Big 4 connected meter to post data to Apple Health ([Roche's Accu-Chek Connect](#) does not); and (iii) it offers potential for other apps like [Glooko](#), [mySugr](#), [Meal Memory](#), and [OneDrop](#) to pull the readings automatically and combine it with other data (e.g., exercise, meals, insulin doses). [Dexcom](#) really took the lead on posting data to Apple Health (G4 with [Share](#) and G5), and we look forward to more devices moving this way - it could enable a flourishing ecosystem of patient apps, and maybe even automatic upload into EHRs (as [we saw at DTM](#) with [Dexcom/EPIC](#)).

We are big fans of connected devices, given the ability to share data with zero hassle, provide a stronger user experience, remotely monitor, run analysis in the cloud, and more. The caveat is the accompanying rise in patient expectations - the user experience on a phone is expected to be world class, and early adopters can grade connected device apps harshly. Indeed, the [OneTouch Reveal app](#) has cumulative 2.5/5 stars (n=230), [Roche's Accu-Chek Connect](#) app has 2.5/5 stars (n=7), [iHealth's Gluco-Smart](#) app has 3/5 stars (n=65), and [Dexcom's G5 app](#) has 3/5 stars (n=33). The leading connected device app on the iPhone is [Medtronic's MiniMed Connect](#) with 3.5/5 stars (n=34) following its recent launch.

In data management, [mySugr](#) has a remarkable 5/5 stars (n=1,907), trailed by [Glooko](#) at 4/5 stars (n=155). [Glucose Buddy](#) seems to be the market leader in terms of volume, with 6,432 reviews and 4/5 stars. We think [mySugr](#) has really set itself apart in terms of a killer user experience and real value for users (search, analysis, reports), and the upcoming bolus calculator will be a great addition for MDI users.

We believe all these apps have brought extremely valuable innovation to diabetes, and it's a tall order for medical device makers to compete with the user experience of Facebook and Google apps given regulatory hurdles for a start! Things are in the early stages now - most people don't even own connected diabetes devices! - and moving the data seamlessly off devices and into the cloud is only step one. Doing something valuable with the data is really where the magic will happen (e.g., insulin dosing advice). For that, we look forward to device companies working with the FDA and potentially partnering with external software developers to bring truly compelling offerings to market. Who will get there first?

- **In tandem with this announcement, LifeScan donated 1.3 million strips to IDF's Life for a Child program.** Impressively, LifeScan has support Life for a Child since 2004 - we were

very excited about this piece of the announcement since it makes people everywhere all the more aware of the highest-need most vulnerable populations.

- **Penetration of connected meters is still low in the diabetes market research company dQ&A's patient panel** ([contact CEO Richard Wood](#) for more information). Part of the reason may be that connected devices need to show more compelling evidence to payers, providers, and patients. In addition, many patients still get their meters for free, so charging extra for a connected device seems out of the question unless the benefits are clear

### **Close Concerns Questions**

Q: When will connected glucose monitoring devices see higher penetration? What benefits will make them so compelling that patients widely adopt them?

Q: How can device companies gather more evidence to support the value of connected glucose monitoring devices? What evidence would cause payers and providers to actually drive patient adoption?

Q: How much are current reimbursement and care delivery models preventing provider engagement with connected glucose monitoring devices?

*-- by Adam Brown and Kelly Close*