

# The Rise of Diabetes & the Six Types of Americans Who Are Getting It

## A Rising Tide & An Expanding Market

It is no secret that diabetes in the United States is epidemic. Despite decades of warnings, a mountain of evidence, and a flurry of new therapies to both prevent and treat diabetes, the prevalence of diabetes (both type 1 and type 2) in the U.S. is expected to continue increasing dramatically in the coming decade, due to ongoing lifestyle and environmental influences and to extended American longevity. In addition, advancements in glucose monitoring and emphasis on regular A1c testing have driven greater awareness and diagnosis for diabetes and pre-diabetes, broadening the diabetes patient base even further. We are living longer than ever, and more Americans are living with diabetes than ever, creating a massive and rapidly-expanding market for diabetes-related care, which already accounts for 25% of the healthcare spending in the United States today. This growing marketplace creates significant opportunities for manufacturers in the pharmaceutical, healthcare device, and surgical equipment sectors, both those within the diabetes space and those in adjacent/related spaces.

But the diabetes market is not homogeneous – manufacturers must align diabetes solutions to the distinct motivations, barriers, and purchasing patterns of specific groups of people living with diabetes and those who care for them. Only those who adapt offerings—whether by innovation, messaging, care model, or accessibility—will achieve sustained growth as diabetes prevalence continues to reshape American health needs.

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By leveraging a robust market segmentation, we can make informed predictions on which Americans are most likely to be impacted by diabetes, how they will be impacted, and leverage strategies that help us prepare to serve each segment with innovation and marketing starting now.

## Changing Behavior & Impact by Life Lens

The Directions Group's Life & Health Lenses study (2025) surveyed nearly 2000

Americans on their health attitudes, beliefs, and behaviors in order to understand and predict coming changes in the American health landscape. This study revealed three factors which, in combination, represent a person's health empowerment: their health resources, their health knowledge, and their sense of personal health autonomy. These factors, in turn, create a natural segmentation of Americans by their health behaviors and outcomes represented by six Life Lenses that fall in different places on the health empowerment continuum:



These Life Lenses are particularly relevant to diabetes care and prevention, which relies heavily on social, psychological, and lifestyle influences to drive behaviors and outcomes. Based on the current and projected diabetes trends in America, here is a look at how diabetes will specifically impact each of the six Life Lenses as prevalence rises:

### Stressed & Surviving (16% of pop.)

#### Catastrophic Financial Impact with Limited Coping Mechanisms

The growing diabetes prevalence will create significant financial consequences for this lens. With 45% already unable to afford medical insurance and the lowest income levels, the average annual diabetes healthcare costs of more than \$16,000 per person represent an insurmountable burden. With over 1.3 million Americans already rationing insulin due to cost, this group faces dangerous choices between diabetes management and other necessities. As diabetes costs continue rising, they will face impossible choices between medication and food, leading to dangerous medication rationing and delayed care that can prove disastrous.



### ► Highest Risk Profile Meets Worst Healthcare Access

Those with the Stressed and Surviving Life Lens face a perfect storm of diabetes vulnerability. With 76% already living with chronic conditions and 80% being overweight, they're more likely to suffer from the effects of diabetes and its comorbid conditions. However, their tendency to delay doctor visits due to cost barriers means they'll likely be among the nearly nine million Americans with undiagnosed diabetes. When diagnosed, their lower health knowledge and lower agency will make diabetes self-management extremely challenging.

### Practical & Pragmatic (20% of pop.)

#### ► Insurance-Dependent Vulnerability Despite Better Access

While two-thirds of Americans with the Practical & Pragmatic Life Lens can afford medical insurance, their moderate resources make them vulnerable to insurance policy changes and price hikes. As diabetes-related healthcare costs account for 25% of all healthcare dollars, insurance companies are likely to increase premiums or reduce

coverage as diabetes prevalence grows. This Lens's pragmatic approach means they'll seek cost-effective diabetes management solutions but may struggle with expensive new treatments (like GLP-1s) that can cost hundreds or thousands of dollars monthly without coverage. Their systematic approach to healthcare means they will follow doctor recommendations as much as possible, but cost considerations will ultimately limit optimal treatment options.

#### ► Aging Double-Jeopardy

As the oldest demographic segment with 72% having chronic conditions, Practical & Pragmatic Americans face compounding health risks. The higher diabetes prevalence in adults 65+ means this lens will experience the highest absolute diabetes rates. This is a compounding factor for their predisposition toward a slow metabolism and difficulty with weight management, which together will complicate even the most earnest diabetes prevention efforts. As diabetes prevalence grows with our aging population, it will disproportionately grow among people with this Lens.



## Left Behind (11% of pop.)

### ► Rural Healthcare Desert Crisis

The Left Behind Life Lens is predominantly rural and has lower resources, and with diabetes prevalence 16% higher in rural areas compared to urban areas they face significant diabetes care access challenges. Unfortunately, the rural-urban diabetes morbidity and mortality gap has only widened over time and is anticipated to accelerate as diabetes costs rise. With 37% of Left Behind Americans unable to afford insurance and a tendency to delay medical care, they'll rely heavily on emergency services for diabetes complications, costing both them and their providers more money to treat their acute symptoms. Their tendency toward manual labor occupations may be threatened by diabetes-related complications like neuropathy and vision issues, creating a downward economic spiral that compounds with age and later resources-readiness for retirement.

### ► Distrust of Medical System Meets Chronic Disease Reality

In addition, the Left Behind Lens's skepticism toward modern medicine is in inherent conflict with extensive medical management that diabetes requires. This Lens will likely pursue alternative treatments and delay evidence-based diabetes care, leading to higher complication rates and poorer outcomes. This distrust is also likely to delay diagnosis putting Left Behind Americans at higher likelihood of being among the 20%+ of Americans with diabetes who are unaware they have it and therefore leaving it wholly untreated.



## Winging It (22% of pop.)

### ► Insurance Gap Generation Faces Chronic Disease Management

As the Life Lens with the youngest skew, nearly half of American adults with the Winging It Lens are unable to afford insurance. While their current diabetes risk is lower than the other Lenses that skew older, they represent a massive diabetes risk (and particularly an undiagnosed risk) as they age, with onset of diabetes at younger ages than their other-Lens counterparts. The CDC projects dramatic increases in diabetes among young people, with potential 700% increase in youth type 2 diabetes by 2060; Winging It's preference to avoid doctors unless sick means diabetes detection will be delayed, often only occurring during crisis

situations where diabetes has already taken an acute toll on the body.

### ► Technology-Native Diabetes Management Potential

Despite healthcare access challenges, this tech-savvy Lens shows promise for digital diabetes management solutions for those who are proactive about their care. Their willingness to try health apps and wearable devices such as continuous glucose monitors (CGMs) creates opportunities for innovative diabetes monitoring. This is likely to be among a minority of Winging It Americans, however, until CGM and similar advanced monitoring technologies become over-the-counter accessible and affordable.

## WS Wellness Seekers (14% of pop.)

### ► Prevention-Focused Success Stories with Active Management

The Wellness Seeker's high health knowledge and preventative medicine focus positions them well for diabetes prevention through lifestyle modifications. If they are diagnosed with diabetes, their tendency toward high-involvement health management will drive them toward more comprehensive diabetes education and adjunct support services like diet and fitness coaching, potentially achieving better outcomes than other Lenses. In addition, their willingness and ability to pay premium for health means they'll access cutting-edge treatments and monitoring technologies as they become available.

### ► Healthcare System Advocates and Quality-Demanders

With nearly three-quarters of Wellness Seekers able to afford insurance, and with their high health literacy, Americans with this Lens will demand cutting-edge diabetes treatments and comprehensive care coordination. They will adopt new-model CGMs, advanced insulin pumps, and personalized medicine approaches, even before costs come down and access becomes easier. Their vocal advocacy may raise the bar for diabetes care standards system-wide but could also increase healthcare cost pressure on other Lenses.

## WI Energetic Achievers (18% of pop.)

### ► Elite Health Optimization Rises to Defy the Curve

Despite the Energetic Achiever's exceptional health profile (more than half have no chronic conditions), growth in longevity will mean more people diagnosed with diabetes, and this will challenge their identity as health optimizers. However, this Lens's high agency, resources, and knowledge mean they'll likely achieve favorable diabetes outcomes through aggressive lifestyle interventions, advanced technologies, and top-tier medical care. Energetic Achievers are more likely to monitor their health, notice changes, spot pre-diabetes early and take immediate countermeasures. They are also more likely

to see their doctor as a partner and may even reverse the progression of early-stage diabetes through intensive lifestyle modifications.

### ► Innovation Drivers and Healthcare Inequality Amplifiers

The advanced financial resources and health advocacy of the Energetic Achiever Lens will drive demand for premium diabetes treatments, personalized medicine, and cutting-edge monitoring. At the same time, while this accelerates diabetes care innovation it also widens healthcare disparities, and the Energetic Achiever's access to more expensive technologies and specialist care creates a two-tiered diabetes care system that reinforces the health gap with other Lenses.



## What This Means for Healthcare Manufacturers

These insights represent the intersection of market opportunities with urgent unmet needs. Manufacturers who develop Lens-specific strategies – from ultra-premium integrated systems for Energetic Achievers to affordable, insurance-covered solutions for Stressed & Surviving – will capture the market while making the most meaningful impact on American health outcomes. Here are the key needs manufacturers in each sector should focus on for each Life Lens:

	Pharmaceuticals	Healthcare Devices	Surgical Equipment
<b>SS</b> Stressed & Surviving	Affordable meds, insurance coverage, adherence drivers	Medicaid-funded remote monitoring, system simplicity	Cost-controlled procedures, low-risk recovery
<b>PP</b> Practical & Pragmatic	Open to Rx, trust doctors, insured	Proven, insured, easy-to-use	Safe, workflow-optimized, age-focused
<b>LB</b> Left Behind	Trust-inspiring products/messaging, rural access	Emergency access, OTC access, low cost	Emergency/late-stage solutions, rural access
<b>WI</b> Winging It	Adherence drivers, tech/DTC outreach	Smartphone-integrated, simple wearables	High-risk solutions, late-stage solutions
<b>WS</b> Wellness Seekers	Early adoption, strong adherence	Premium, innovative, integrated with wellness	High safety evidence, minimally invasive
<b>EA</b> Energetic Achievers	First adoption, healthspan optimizing	Top-end tech, integration, personalized AI monitoring	Innovative, data-integrated, best outcome evidence

## An Overarching Issue of Access

The most critical barrier across all segments is affordability. Key statistics:

- 45% of Stressed & Surviving cannot afford medical insurance
- 47% of Winging It lack insurance coverage
- Average annual diabetes healthcare costs exceed \$16,000 per person

The biggest opportunities lie in helping to solve for the systematic inequities that leave lower-empowerment Life Lenses behind while serving the premium demands of higher-resource segments. Manufacturers are prioritizing accessibility by launching couponing systems and patient-assistance programs to address those in the lower-empowerment Lenses with diabetes who delay or ration care due to cost.





## Key Priorities by Industry

As both prevalence and accessibility grow, each Life Lens will have its own set of priorities and key needs-spaces as they tackle their diabetes care. Here are some of those priorities by industry:

### Pharmaceutical Companies

#### Segmented Market Approach Based on Life Lenses

Different Life Lenses require dramatically different pharmaceutical strategies:

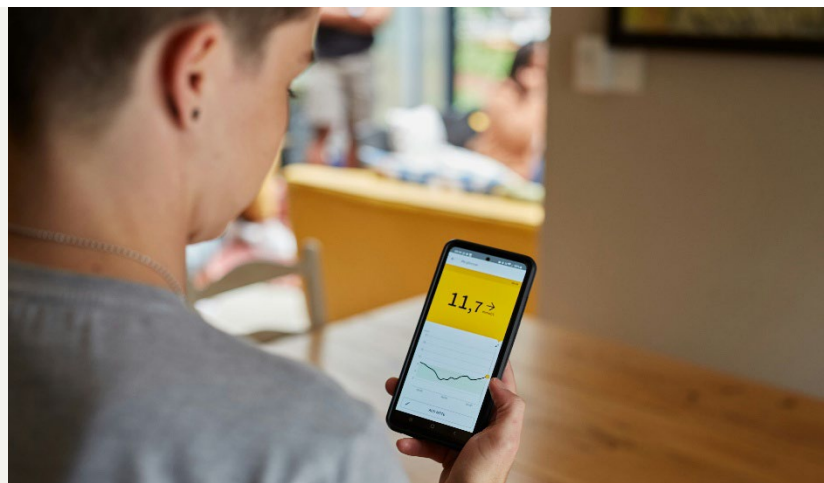
- Energetic Achievers and Wellness Seekers will drive premium diabetes medication adoption, including cutting-edge treatments regardless of cost
- Stressed & Surviving represents the highest-need population with 76% having chronic conditions but facing severe cost barriers, requiring affordable generic alternatives and insurance-covered solutions
- Practical & Pragmatic seeks proven, insurance-covered medications with clear efficacy data from healthcare providers

#### GLP-1 Market Explosion Presents Massive Opportunity

The global GLP-1 receptor agonist market is experiencing unprecedented growth, valued at \$53.46 billion in 2024 and projected to reach \$268.37 billion by 2034 at a 17.46% CAGR. This represents the fastest-growing segment in diabetes pharmaceuticals, driven by both diabetes and obesity applications. Manufacturers should prioritize GLP-1 development as insurance coverage expands and manufacturing constraints ease.

#### Other Behavior-Supporting Medication Demand Will Grow Dramatically

Beyond traditional diabetes drugs, there's growing demand for medications that support lifestyle changes. The Stressed & Surviving lens shows highest potential adoption due to elevated rates of depression (57%), anxiety (52%), and obesity (58%), but cost remains a critical barrier requiring insurance coverage expansion.



### Healthcare Device Manufacturers

#### Lens-Specific Device Strategies

Device manufacturers must tailor approaches and targeting priorities by Life Lens:

- Energetic Achievers (18% of population) will adopt premium devices like advanced CGMs (\$160–500 monthly) and integrated insulin pump systems
- Winging It (22% – largest segment) represents untapped potential for affordable, smartphone-integrated devices but faces insurance barriers with 47% unable to afford coverage
- Practical & Pragmatic requires proven, insurance-covered devices with clear clinical benefits

#### Continuous Glucose Monitoring Dominance

The CGM market is experiencing explosive growth, with the global diabetes monitoring devices market expected to grow from \$16.6 billion in 2024 to \$26.8 billion by 2029 at 10.1% CAGR. CGM systems are rapidly replacing traditional blood glucose meters, capturing increasing market share due to superior patient outcomes and convenience.

### ► Integration and Connectivity Imperative

The future belongs to integrated diabetes management systems. Automated insulin delivery (AID) systems combining CGMs, insulin pumps, and algorithms are becoming standard of care, with companies like Medtronic, Insulet, and Tandem leading development. Successful manufacturers will:

- Develop smartphone-compatible devices for the tech-native Winging It segment
- Create seamless data sharing between devices for the optimization-focused Energetic Achievers
- Ensure simple, intuitive interfaces for the pragmatically-minded segments



## Surgical Equipment Manufacturers

### ► Diabetes-Related Surgical Complications Market

Diabetes significantly increases surgical complexity and costs. People with diabetes undergo surgical procedures at higher rates than non-diabetics and face increased postoperative morbidity and mortality. Key complications requiring specialized equipment include:

- Amputation procedures: \$39,618 per occurrence with \$7,506 ongoing costs
- Cardiovascular interventions: Diabetes patients have 2x higher risk of complications
- Wound healing complications: High blood sugar impairs healing, increasing infection rates from 2% to 18%

### ► Perioperative Glucose Management Equipment

There's growing demand for specialized surgical equipment designed for diabetic patients, including advanced monitoring systems for perioperative glucose control and specialized wound care devices. Post-surgical hyperglycemia affects 20% of patients and doubles mortality risk.



## Fast Facts & Citations

01. Today, 38.4MM Americans (11.6%) have diabetes.  
[source: [CDC](#)]
02. This is expected to climb to 54.9MM by 2030, an increase of 43% in just five years.  
[source: [NIH](#)]
03. People diagnosed with diabetes spend 2.6x more money on medical expenditures than people without diabetes.  
[source: [American Diabetes Association](#)]
04. Diabetes has a disproportionate impact on older Americans (65+), with 29.2% of seniors 65+ living with diabetes.  
[source: [American Diabetes Association](#)]
05. 97.6MM Americans have prediabetes and are at high risk for developing type 2 diabetes, and 81% of them don't know it.  
[source: [American Diabetes Association](#)]
06. The US diabetes market (drugs, care, management, devices) is at 30B and growing at an expected rate of 2.9% CAGR; anticipated to be at nearly 40B (30%+ effective growth) by 2033.  
[source: [imarc](#)]

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