

Pharma is building a direct-to-patient ecosystem. Where does that leave device makers?

Diabetes care is shifting from single-product offerings to integrated care. Pharma companies are building their own channels to patients, pairing therapy with monitoring and adherence support, and building on the data they capture. While device companies lead with hardware and generate rich data, they have not yet turned it into an owned patient relationship. Both are competing for ownership of that patient relationship.

Whoever combines drug, device, data, and patient support into one integrated offering gains the advantage over anyone who owns only a single piece.



MARKET DYNAMICS

BUILDING THE PATH TO PATIENTS

New distribution models are letting patients access GLP-1 through non-traditional access channels. Direct-to-patient platforms are moving towards going beyond drug delivery, bundling telehealth, coaching, and care navigation into one manufacturer-owned offering. This runs mainly through obesity and non-insulin patients today, but it normalizes a direct relationship that can extend to insulin-treated populations next. If patients start entering the system through these direct channels instead, the device company is no longer the first business the patient encounters.

BUILDING THE COMBINATION

Device makers and drug makers are building toward the same patient, and growing evidence now says incretins and diabetes devices are complementary, not competitive. Pharma is advancing novel single, dual, and triple receptor agonist therapies that pull millions of new patients into active glucose management. Devices can be a key part of integrated care and adherence, if they travel with the drug rather than wait downstream of it.

BUILDING THE DATA LAYER

Drug companies want to own the data layer above the device. Pharma leaders are buying and building the data-capture that records how a patient takes each dose, feeding that record into their own platforms, and wrapping monitoring, coaching, and reminders around the therapy to drive adherence. Device makers generate the richest data in diabetes and invest heavily in it, but that data still sells more sensors and pumps rather than winning the patient relationship. The company that turns glucose data into an owned patient relationship controls the data layer.

MARKET IMPLICATIONS

- + Pharma is closing the access gap.** New access channels are reaching patients before the traditional care pathway does and bringing the full support journey with them. This creates an opening for devices to travel with the drug from the start.
- + The evidence for integration already exists.** Device, drug, and behavioral support work better together than any one piece alone, yet nobody has combined them into one integrated offering yet.
- + Devices manufacturers can move into integrated care.** If manufacturers can pair the device with data and support and move with therapy, then they can move toward owning the patient relationship.
- + Without integration, a device company becomes one piece in someone else's offering.** A device manufacturer that competes on hardware while others compete on the relationship will end up part of someone else's ecosystem instead of building the ecosystem itself.

Does your company build the integrated offering, or does someone else build it around you? If you are thinking about how device manufacturers can respond to this shift, let's chat! We help device manufacturers with market insights, market research, patient-access and channel strategy, partnership strategy, and go-to-market positioning!

Ready to turn these insights into your strategy playbook?



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