



RACE TO SCALE:

MARKETING AND PR STRATEGIES TO
ACCELERATE GROWTH OF REMOTE
PATIENT MONITORING COMPANIES

SAY.



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RACE TO SCALE

1 KNOWING THE RACE: THE STATE OF THE DIGITAL HEALTH MARKET

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KNOWING THE RACE

The digital health and remote patient monitoring (RPM) market has changed significantly over the past few years.

The COVID-19 pandemic was a catalyst for the technology's adoption, and demand for digital health services surged as healthcare providers turned to RPM to reduce hospital visits and manage care remotely. Between 2020 and 2024 users of digital treatment and care worldwide increased from 887 million to a staggering 1.3 billion¹, and digital health investment hit a record high of \$57.2 billion in the US in 2021². The market was booming, investors were optimistic, and more players joined the race to grow remote patient services.

With a saturated market, the hype surrounding digital health is waning. Raising the funds necessary to stay in the game is becoming more challenging, and the market is consolidating. Companies that thought they were in a sprint race need to compete in what feels more like the 400 metre hurdles. Since former RPM front-runner Babylon Health declared bankruptcy in 2024 (two years after going public at over \$4 billion) investors are increasingly wary. Keith Errey, CEO of Isansys Lifecare, told Business Cloud: "Coming down off the top of the digital health hype curve, spectacularly illustrated by high-profile failures such as Babylon, investors are much more cautious of digital health companies"³.



From 2020 to 2024, digital treatment and care users grew from 887 million to 1.3 billion.



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**Keith Errey, CEO
Isansys Lifecare**

Investors have lost faith in the longevity of RPM companies and tend to see them as "part of a digital health wave that lost a lot of money for a lot of people," Errey added. Since its 2021 peak, investment and funding fell to just \$10 billion in 2024. UK and European digital health companies have realised that small projects won't bring in the necessary profits—you have to think big.

The fragmented procurement market in Europe, Middle East and Africa and the relatively small size of each country within this region, means that accelerating growth is the only way to stay in the race. Expanding into new therapy areas, acquiring companies, breaking into new markets and forging partnerships are some of the most successful strategies, and they share one thing in common: marketing and PR is at the core of their successful execution.



Digital health companies in the UK and Europe are realising that small projects are not going to bring in the necessary profits—you must think big

1 - Statista Research Department. Number of users in the Digital Health market for different segments Worldwide from 2019 to 2029 [Online]. 2024. Available at: <https://www.statista.com/forecasts/1443131/number-of-users-digital-health-market-for-different-segments-worldwide>

2 - Landi, H. Global digital health funding skyrockets to \$57.2B with record cash for mental health, telehealth [Online]. 2022. Available at: <https://www.fiercehealthcare.com/digital-health/digital-health-startups-around-world-raked-57-2b-2021-up-79-from-2020>

3 - Symcox, J. 2024 'shaping up to be breakthrough year for Isansys' [Online]. 2024. Available at: <https://businesscloud.co.uk/news/2024-shaping-up-to-be-breakthrough-year-for-isansys/>

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MERGERS AND ACQUISITIONS AND THE ROLE OF PR AND MARKETING

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COULD YOU RUN IN A RELAY?

M&As can be key to accelerating growth faster than the competition. The UK market is consolidating, driven by technology integration or strategic investments.

For example, in 2024, Huma – the digital health giant used by two-thirds of UK primary and secondary healthcare providers– strategically acquired eConsult, one of the largest digital-first triage and automated consultation platforms in primary and emergency care. This acquisition brings Huma closer to providing an end-to-end technology platform, a solution that healthcare providers most often seek from digital services.

Another company growth strategy is to sell their technology to bigger players. Current Health was a humble Scottish startup before becoming a leading care-at-home technology platform following its acquisition by US electronics retailer Best Buy. With its impressive physical reach, supply-chain logistics, and support services, the new owners gave Current Health unprecedented access to the US market and put it a step ahead of competitors who only target the UK and the EU.

Attempting a similar strategy raises many questions. How can you attract companies willing to negotiate an acquisition? How should you manage the expectations of healthcare providers and patients during the transition process? Controlling the narrative with a carefully planned communication strategy is key.



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GETTING YOUR BRAND READY FOR AN M&A

Building a compelling brand story should be a priority for those gearing up for an M&A or to attract investment. An ongoing PR programme can project the image of a thriving business by ensuring maximum coverage in the right publications. To bolster this perception, a well-crafted thought leadership strategy allows company leaders to explain the service's uniqueness, what pain points it addresses and why the company is poised for growth in the future.

M&A processes are often fraught. It's a confusing time for employees, customers, and stakeholders alike, and communication is vital to ensure that misinformation doesn't spread and that the merger's positive aspects are highlighted. Operose Health is a prime example of the dangers of M&As: when the US-owned company acquired UK GP practices it came under fire because of concerns about NHS data being held by a US company. Then, when it divested the UK business to HCRG, the app service Dr. IQ suffered outages, providing the media with an opportunity to raise the alarm about the risks posed by private companies infiltrating public healthcare.

Having a clear comms plan and a ready-to-go crisis playbook will enable you to stay in control of the narrative, appear credible and transparent, and proactively manage emergencies that might arise—issues with technology changes or downtime, for example. Comms can de-risk your race, ensure you don't fall at the last hurdle and stay ahead all the way to the finish line.



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CASE STUDY: ELEVATING BEST IN CLASS TECHNOLOGY

Repositioning, launch and thought leadership media programme to establish Remote Diagnostic Technologies (RDT) in the civilian healthcare market.

THE BRIEF

RDT specialises in remote monitoring and resuscitation solutions, and was already well established in the military market as the monitor of choice for the Ministry of Defence and other EU Forces.

The next phase of growth relied on establishing the company within civilian healthcare, particularly ambulance trusts.

SOLUTION

Our media strategy included creating a clinical benefit-led narrative for medical, professional and decision makers media plus highlighting technology advances for the med-tech and purist tech media, increasing the potential for wider understanding of the benefits of RDT solutions over incumbent providers.

The aim was to encourage trusts to revisit their procurement priorities in line with their 2020 priorities.

The PR campaign elevated RDT as the innovator in the field and led Philips to select RDT as the ideal acquisition to strengthen its leadership position in the resuscitation and emergency care market.



RESULTS

ACQUISITION

Philips acquired RDT for its portfolio of connected emergency care solutions

79

Pieces of coverage at launch

+15M

Total circulation (specialist media)



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EXPANDING INTO NEW TERRITORIES AND THE ROLE OF PR AND MARKETING

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SHOULD YOU SWITCH LANES?

Accelerating growth means being ready to change and evolve in line with new developments. Expanding into new geographical, technological, or therapeutic territories may give your company a leg-up over the competition.

Doccla, a company that provides virtual wards for remote patient monitoring and research, raised \$46 million in 2024 for European expansion. This has allowed it to become one of Europe's leading virtual care solutions, with its devices being used in the UK, France, Germany, Italy and more. Conquering new markets is a practical way to stay in the race as competition intensifies in a particular territory.

Other companies have been entirely reborn by switching strategies and exploring new technologies. Sensyne Health, which originally focused on remote diabetes monitoring, was plagued with financial issues for several years before being entirely restructured into Arcturis in 2024. This involved a shift towards using patient data in clinical trials for medicines. Since the rebrand, Arcturis has secured a funding package that will see it comfortably through 2025 and sold or closed non-core and loss-making divisions. This significant amount of progress in a short amount of time effectively saved the company from bankruptcy.



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THE ROLE OF MARKETING AND PR IN SUPPORTING EXPANSION

If you plan to expand into new areas, refreshing your brand and sharpening your messages will be key. Every territory, service and therapy area present nuances, so a one-size-fits-all approach won't work. The offering needs tailoring for each audience, matching their specific vendor evaluation criteria, and different features should be showcased depending on the hierarchy of success benchmarks.

Medical technology can deliver a range of benefits, from better health outcomes to reduced costs, from patient experience to provider satisfaction. The American Medical Association's Remote Patient Monitoring Playbook lists 28 measures of ROI; which should you champion? Answering these questions when entering uncharted territories is not easy.

As with athletics, competing in different environments impacts performance, and access to expert coaching and the latest data is key to success. Accessing experts on tap is invaluable. They can provide insights to fast-track your knowledge of a new area and ensure your messages resonate with new audiences. An external agency is best placed to organise advisory boards, roundtables, or expert workshops, providing an outside perspective, facilitating to avoid biased answers and distilling the findings into actionable insights.

Data, a common language that all decision-makers speak, can be leveraged to create a bridge between digital health companies and healthcare providers. Whether you need to package your own data in an impactful way, or source external data to validate your messages, an agency can empower comms and marketing teams with assets that grab media and target audience attention.



To expand into new areas, refresh your brand, tailor the offering and sharpen your messages.

CASE STUDY: SHAPING A DIGITAL HEALTH COMPANY'S NARRATIVE

Definition Health, a relatively new company working to digitise the surgical patient journey, was confident it had a good product but had neglected the marketing of this to customers. The company was not telling its story or being visible to stakeholders

THE BRIEF

The company asked SAY for help with creating:

- Consistent naming of its brand and products
- Key messages for the company/products/philosophy/ founders
- Propositions for their products as the solution to the unmet needs of hospital trusts
- Topics bible

SOLUTION

SAY worked with the Definition Health team to create a compelling narrative for the company and value propositions for its suite of products, highlighting the benefits for all target audiences.

Our strategy was to position the products as an end-to-end solution, which informed the new product names. Following a branding workshop, run by SAY, the company adopted new names for their product family.

A Topics Bible, building on the messaging and positioning work, identified the company's ownable topics and mapped where and how they could start positioning their corporate and product messages most credibly in the media.



RESULTS

3

New Product names

12

Thought Leadership topics

NEW

Website copy and product brochure

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A black and white photograph of a man and a woman high-fiving on a running track. The man is on the left, wearing a grey t-shirt and dark shorts, smiling. The woman is on the right, wearing a black long-sleeved top and dark leggings, also smiling. A large, stylized orange number '4' is overlaid in the center of the image, partially obscuring the high-five. Below the number, the text 'FORGING PARTNERSHIPS AND THE ROLE OF PR AND MARKETING' is written in bold, white, sans-serif capital letters.

FORGING PARTNERSHIPS AND THE ROLE OF PR AND MARKETING

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COULD YOU BENEFIT FROM HAVING A RACE BUDDY?

The digital health and remote patient monitoring (RPM) market has changed significantly over the past few years.

Going the distance alone can be tough, and having a partner to help you along can be a huge advantage. Huma is, again, a good example. Over the years, the company has forged meaningful partnerships to expand its business, like the remote patient monitoring app for orthopaedic surgery developed for the NHS with Smith + Nephew. Smith + Nephew provided the orthopaedic expertise, and Huma provided the digital technology to create an app that assists in the management of patients undergoing knee and hip replacement surgery.

In relation to why partnerships are important, Huma says: “[Creating better care] is not a one-company mission. What’s technology without insights? Data without context? Knowledge without action? We couldn’t do this without our partners and collaborators.”⁴ Strategic partnerships allow you to find practical applications for your technology and piggyback on products already adopted by healthcare services to augment their benefits, while creating the opportunity for your company to play a meaningful role in that space.



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Huma

THE ROLE OF MARKETING AND PR IN CREATING AND FOSTERING PARTNERSHIP OPPORTUNITIES

Even if you employ a Head of Partnerships to identify, evaluate and secure potential collaborators and partnerships, an external agency can help. From mapping and identifying potential targets, to crafting the partnership messaging and outreach materials, an agency can help break down silos to make your departments work together towards the common goal.



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CASE STUDY: GENERATING GLOBAL PARTNERSHIP OPPORTUNITIES

A global Account Based Marketing (ABM) campaign supported Camcon Medical in accelerating adoption of its unique technology, which has the potential to revolutionise oxygen delivery in medical devices.

THE BRIEF

Elite R&D company Camcon Medical needed to kick start conversations with decision makers at chemical and medical devices companies, in order to identify potential partners to commercialise its innovative valve technology.

SOLUTION

Together with the Business Development team we clearly defined the buying personas and the key issues that would prompt them to partner with an external company to upgrade their devices. Content marketing materials were developed to address these topics by repurposing blogs and previous coverage.

We designed a global yet targeted approach to maximise the reach of the campaign, by identifying 50 companies to be approached.

We leveraged LinkedIn ABM tools for laser-focused targeting that delivered high quality of leads.



RESULTS

+400%

In LinkedIn page views and followers during the campaign

65%

Of the leads captured were the primary buying personas:
Directors and Product Managers

1 in 3

Companies targeted resulted in a lead for further conversations

ABOUT US

SAY is an integrated healthcare and technology public relations and marketing agency that drives positive change through award-winning communications programmes.

Our approach is simple: We combine insight, deep industry knowledge and long-term connections to help our clients cut through the noise and achieve their strategic goals.

WE SUPPORT RPM & DIGITAL HEALTH COMPANIES

Our communication strategies and campaigns have supported remote patient monitoring and digital health companies with their mergers and acquisitions, expansion into new territories, and partnership development.

OUR SERVICES

We offer a full range of marketing, communications and PR services, working for both UK and international clients.

- Integrated corporate, brand and internal communications
- Marketing and communications strategy
- Content development
- Stakeholder engagement
- Media relations
- Awareness and behavioural change programmes

Say Communications

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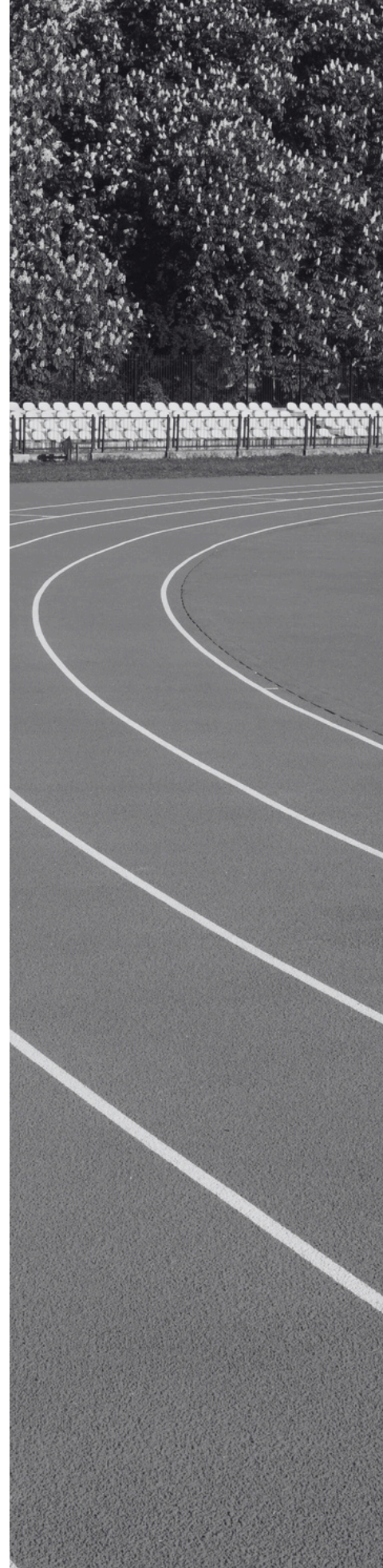
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Get in touch to discuss
how we can help you
win the race to scale

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