South East Asia Telehealth Market Size, Share & Trends Analysis Report By Service Type (Remote Patient Monitoring, Real-time Interactions), By Delivery Mode, By Application, By Type, By End Use, And Segment Forecasts, 2021 - 2028

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Abstracts

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South East Asia Telehealth Market Growth & Trends

The South East Asia telehealth market size is expected to reach USD 916.2 million by 2028 and is expected to expand at a CAGR of 17.6% over the forecast period, according to a new report by Grand View Research, Inc. Constant evolution of smartphones has made accessing telehealth and teleconsultation services more convenient and is expected to contribute to the growing demand. The growing number of users and technologically advanced smartphones are enabling users tracks their fitness, monitor health, initiate conversations with healthcare professionals, and book appointments.

For instance, several apps such as Doctor Anywhere, Doctor on Call, and ClicknCare have been introduced to help patients book appointments, track their consultations and medical prescriptions, and store their healthcare information over course of the treatment. Furthermore, teleconsultation and telemedicine are widely being adopted across the region since it enables the communication between patients and caregivers in remote locations.

The ongoing Covid-19 pandemic has burdened global healthcare systems and is anticipated to drive the demand for telehealth services. Owing to lockdowns and

movement restrictions, patients shifted their focus to telemedicine amidst the fear of contracting the virus by visiting the healthcare facility. Moreover, insurance companies are collaborating with market players to provide free consultation to their customers. For instance, Cigna Singapore and AIG partnered with Doctor Anywhere for providing Covid-19 Medical Advisory Clinic as a free service to policyholders across Vietnam, Singapore, and Thailand.

The demand for teleconsultation will continue to grow to post the pandemic owing to the increasing adoption of digital technologies, growing government support, advancements in digital infrastructure, and increasing public and private investments. Several key players like MyDoc, Haldoc, Alodokter, and Doctor Raksa have witnessed a surge in revenue generation and growth in daily users since the inception of the pandemic.

Based on the service type, the real-time interactions segment accounted for the highest revenue share in 2020 owing to the rising preference of telemedicine services by patients and healthcare providers to follow the Covid-19 protocol of social distancing without compromising the quality of care. Moreover, these services enable real-time interactions with patients in remote locations at an affordable price. On the other hand, the remote patient monitoring segment is anticipated to register the fastest growth during the forecast period owing to the increasing disease burden, rising healthcare costs, and geriatric population in this region. Moreover, technological advancements in video conferencing systems and the development of digital infrastructure are excepted to positively influence segment growth. Lastly, the growing demand for personalized and specialty care is expected to propel the adoption of these services.

In 2020, the web-based delivery mode segment accounted for the highest revenue share owing to the availability of the large number of web-based telehealth platforms and growing usage rates of web-based platforms by patients and healthcare personnel. Moreover, web-based data can be accessed and analyzed in real-time from remote locations and thereby, reduces operational hassles. On the other hand, the cloud-based delivery mode segment is anticipated to register the fastest-growing during the forecast period owing to numerous benefits such as high bandwidth, easy accessibility, easy data recovery and storage, and better data privacy and security. Due to these benefits, the cloud-based delivery mode is witnessing a surge in its adoption rate and is expected to rapidly grow over the forthcoming years.

Based on the application, the diagnosis segment accounted for the highest revenue share in 2020 owing to increasing penetration of the internet, increasing number of smartphone users, and rising adoption of telehealth services. Growing awareness levels of the benefits of telemedicine among patients, providers, and payers are driving the segment. On the other hand, the prevention application segment is expected to exhibit the fastest growth during the forecast period owing to growing awareness about the importance of health and fitness to avoid chronic ailments is supporting the segment growth. Healthcare systems sustainability is threatened with the increasing prevalence of chronic diseases, rising healthcare costs, and shortage of personnel, which is boosting the demand for telehealth services for the prevention application segment. Furthermore, the shift towards value-based care is strengthening the demand for better patient outcomes at a more sustainable cost is driving the adoption of telemedicine services for earlier disease prevention.

In 2020, the tele-hospital type segment accounted for the highest revenue share owing to the rising adoption of digital healthcare technologies, increased healthcare IT expenditure, and growing government initiatives towards telehealth services. Moreover, the growing geriatric population increased health consciousness, and rising demand for affordable and accessible healthcare is contributing to the segment growth. On the other hand, the tele-home type segment is anticipated to register the fastest-growing during the forecast period owing to its various advantages such as affordability, efficiency, and delivery of quality care. Moreover, the increasing number of internet-enabled device users is enhancing the accessibility of these services the increasing adoption of cloud computing solutions. In addition, increased usage of internet and web-based services and its enhanced accessibility from the most remote locations are contributing to the growing delivery segment.

Based on end-use, the providers segment accounted for the largest revenue share in 2020 owing to the rising adoption of telemedicine platforms by healthcare providers to reduce the burden on healthcare facilities and resources. Moreover, the growing middle class is demanding quality care, which is expected to contribute to the growing segment. On the other hand, the patient end-use segment is anticipated to be the fastest-growing segment during the forecast period owing to the increasing number of active users and website visits on the telemedicine platform. Moreover, telehealth services have enabled communication channels between the healthcare provider and patients residing in remote locations.

In 2020, Indonesia dominated the market. This can be attributed to the rise in the adoption of telehealth services and favorable government policies and initiatives. Key players such as Haldoc and Alodokter witnessed a surge in their telemedicine services throughout the Covid-19 pandemic. The shortage of healthcare personnel in Indonesia is contributing to the growth of the market in Indonesia. On the other hand, Malaysia is expected to be the fastest-growing region during the forecast period owing to the increasing deployment of telemedicine services, growing prevalence of chronic diseases, rising healthcare costs, and shortage of healthcare personnel.

South East Asia Telehealth Market Report Highlights

The market is anticipated to witness significant growth by 2028, owing to the increasing adoption of digital healthcare technologies and penetration of internet-powered smartphones and devices

The real-time interactions service type segment dominated the market in 2020, owing to increased accessibility and analysis of real-time data from patients in remote locations

The web-based delivery mode segment dominated in 2020, owing to the growing number of web-based platform users in the patient and provider community

The diagnosis application segment dominated the market in 2020, owing to increasing penetration of the internet and favorable government initiatives and support

The tele-hospital type segment dominated the market in 2020 owing to the rising adoption of digital healthcare technologies and the development of healthcare IT infrastructure

The provider segment dominated the market in 2020 owing to the widespread adoption of telehealth services to reduce the burden on healthcare facilities

Indonesia dominated the market in 2020 owing to the rapid adoption of telemedicine service and government support

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