

Asia Pacific Medical Second Opinion Market Report (2021–2031) by Scope, Segmentation, Dynamics, and Competitive Analysis

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Abstracts

The Asia Pacific medical second opinion market is projected to grow significantly, reaching approximately US\$ 2,721.32 million by 2031, up from US\$ 903.81 million in 2023, with a compound annual growth rate (CAGR) of 14.8% during this period.

Executive Summary and Market Analysis

The Asia Pacific region is recognized as the fastest-growing market for medical second opinions. This market is divided into several key countries, including China, Japan, India, South Korea, Australia, and other regions within Asia Pacific. Notably, China, India, and Japan are major contributors to the growth of this market. Key drivers include an increasing elderly population, a rise in chronic diseases, and supportive government initiatives. Furthermore, the growing adoption of telemedicine and artificial intelligence (AI) in providing second opinions is also propelling market expansion.

Market Segmentation Analysis

The Asia Pacific medical second opinion market can be segmented based on medical conditions and service providers.

By Condition: The market is categorized into various conditions such as cancer, orthopedic disorders, cardiac disorders, neurological disorders, nephrological disorders, hematological disorders, chronic obstructive pulmonary disease (COPD), organ transplants, and others. In 2023, the cancer segment dominated

the market share.

By Service Provider: The market is also segmented by service providers, which include hospitals, health insurance companies, and online services. The hospitals segment held the largest market share in 2023.

Market Outlook

The integration of medical services with digital platforms is enhancing the popularity of digital consultations. This trend allows patients to obtain second opinions without needing to visit healthcare facilities, offering convenience, improved patient experiences, and effective cost management. Digital platforms enable consultations from remote areas, increasing access to medical experts. Collaborations between software companies and healthcare institutions are accelerating the digital transformation of medical consulting services. For instance, in October 2021, Cigna Health Plan announced an expansion of its virtual care services, including digital-first primary care and urgent care.

Country Insights

The Asia Pacific medical second opinion market includes key countries such as China, Japan, India, Australia, South Korea, and others. China accounted for the largest market share in 2023. According to the World Health Organization (WHO), there were approximately 4.57 million new cancer cases and 3 million cancer-related deaths reported in China as of April 2020. The country sees a new cancer diagnosis every minute, with lung, stomach, breast, thyroid cancers, and leukemia being the most prevalent types.

A study published in *The Lancet* in 2019 highlighted that the aging population in China, projected to reach 402 million by 2040, is more susceptible to chronic diseases, making accurate diagnoses critical. Misdiagnosis rates are high, with a study indicating that about 72.97% of patients with rare diseases in China were misdiagnosed, underscoring the importance of seeking second opinions.

China's vast population and advanced healthcare infrastructure, coupled with rapid communication advancements, facilitate telemedicine consultations primarily between

hospitals. Telemedicine programs in China are enhancing cancer diagnosis and treatment, particularly in rural areas. Companies like MediStar Health in Shanghai connect patients with foreign doctors via teleconferencing, while Voycare has developed an online portal for medical second opinions, allowing patients to upload medical reports for review by US healthcare professionals. This service became particularly valuable during the COVID-19 pandemic when travel restrictions hindered access to international medical care.

Company Profiles

Key players in the Asia Pacific medical second opinion market include Second Opinion International, Elite Medical Services, The Cigna Group, Helsana, WorldCare, Vidal Health Insurance TPA Pvt Ltd, 2nd.MD, Axa SA, Teladoc Health Inc, Included Health, Inc., and Royal Doctors. These companies are pursuing various strategies such as market expansion, product innovation, and mergers and acquisitions to enhance their offerings and increase market share.

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