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Southeast Asia Telehealth Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Telehealth refers to the application of digital technologies and communication tools to provide healthcare services remotely, such as consultations, monitoring, prescriptions, and patient education, thereby bridging the distance between the patient and the provider.

The Southeast Asian Telehealth market is expected to exhibit a growth rate of 18.55% during the forecast period (2025-2033F). The rise of smartphone penetration, an increase in healthcare demands in rural areas, and favourable government policies towards digital health. Additionally, the rising cases of chronic illnesses, the expansion of insurance coverage for telehealth services, and the modernization of digital infrastructure also play a significant role. Additionally, the rising shift towards acceptance has been further enhanced by post-pandemic changes in behavior, which now make telehealth a mainstream choice in healthcare. Moreover, the rise of telehealth services in Southeast Asia drives the telehealth market's growth.

For example, on 13 February 2025, ORA Group, a Singapore-based health and wellness company known for its leading telehealth services, and Sons and OVA, catering to male and female healthcare needs respectively, expanded their services to launch hybrid weight management care. The model is the only one that involves specialist virtual and face-to-face consultations and a stable healthcare team. The launch is based on the increasing level of obesity in Singapore and the increasing role of telehealth in the healthcare system of the country, where it is crucial to continue balancing convenience, affordability, and quality care.

- Based on component, the market is segmented into services, hardware, and software. Among these, the services category held a dominant share of the

telehealth market in 2024. The adoption is fueled by the services segment, as patients demand convenient, affordable, and accessible healthcare services. In addition, increasing collaborations between digital health technology and specialized providers are making it possible to implement holistic programs for employers and payers, making chronic conditions more accessible and coordinated. For instance, on September 23, 2025, FlyteHealth and Heartbeat Health announced a partnership to introduce a bundled program aimed at integrating cardiometabolic and cardiovascular care through virtual-first solutions. The collaboration focuses on employers and payers, and it provides a single strategy to coordinate such related health conditions.

Based on delivery mode, the market is segmented into real-time, store-and-forward, remote patient monitoring (RPM), and mHealth. Among these, the remote patient monitoring (RPM) is expected to grow at a significant CAGR during the forecast period (2025-2033). This segment plays a significant role in growth, as the prevalence of chronic diseases, including diabetes, hypertension, and cardiovascular diseases, increases. Additionally, RPM enables providers to reduce costs and enhance outcomes by allowing for real-time health monitoring and reducing hospital admissions. It's worth noting that healthcare systems and insurers are being prompted, which speeds up the adoption of the company.

Based on deployment, the market is segmented into web-based, cloud-based, and on-premises. Among these, the web-based category held a significant share of the telehealth market in 2024 due to its ability to be scalable and offer low-cost solutions that are available through simple internet connectivity, which is common in Southeast Asia. Also, reduce the infrastructure obstacles between providers and patients, making digital healthcare more accessible. This cost-effectiveness facilitates quicker adoption of telehealth in the emerging economies in the region.

Based on application, the market is segmented into teleconsultation, telestroke, teleradiology, telepsychiatry, teledermatology, and others. Among these, the teleconsultation category held a significant share of the Telehealth market in 2024. Teleconsultation becomes the most adopted in the market penetration because it caters to urgent medical requirements such as general medicine, mental health, and dermatology. It is the most popular application because of its simplicity and the direct benefits of saving time on travelling, quick access to specialists, and low-cost treatment. The patient engagement in this segment is high, providing companies with a high level of demand momentum.

Based on end-user, the Southeast Asian Telehealth market is segmented into providers, patients, payers, and others. Among these, the providers segment held a dominant share of the market in 2024, driven by growing interest among investors in digital healthcare providers in Southeast Asia, with several of them raising multi-million-dollar funding rounds to speed up regional growth, driving the market. The trend underlines high confidence in the scalability of telehealth solutions and their contribution to transforming the nature of employee and patient healthcare. For example, on August 22, 2025, Naluri expanded further across Southeast Asia, which is a digital employee healthcare provider based in Malaysia. It closed an equity fundraising round, securing USD 5 million from TELUS Global Ventures and existing investors, Sumitomo Corporation Equity Asia, and M Venture Partners. This brings the total Series B funding raised to USD 14 million. Naluri offers tailored employee health programmes to enterprise clients in various industries in Malaysia and Indonesia.

For a better understanding of the market adoption of the Southeast Asian Telehealth market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, Singapore, and the Rest of Southeast Asia. Vietnam is expected to grow at a significant CAGR during the forecast period (2025-2033) due to strong governmental support for digital transformation in healthcare and significant investments in eHealth infrastructure. Moreover, the country's technologically advanced population is rapidly adopting teleconsultations, mHealth applications, and RPM solutions, which contribute to the growth of digital health. Additionally, rising collaborations between state hospitals and commercial telehealth systems are expanding access beyond city limits. For instance, on November 21, 2024, the Viet Nam Ministry of Health (MOH), through the Viet Nam Administration of Medical Services (VAMS), in collaboration with the United Nations Development Programme (UNDP) and the Korean Foundation for International Healthcare (KOFIH), officially launched the project “Telehealth to improve access to healthcare services for disadvantaged groups in Viet Nam.” This project will enhance the health of disadvantaged populations by enhancing digital transformation in health and increasing the accessibility and quality of grassroots health services.

Some major players running in the market include PT Media Dokter Investama and Affiliates (Halodoc), Alodokter, Doctor Anywhere, WhiteCoat Holdings Pte Ltd., Health Digital Technologies Sdn Bhd (DoctorOnCall), SeeYouDoc Corp,

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Viettel, Medgate, MaNaDr Pte Ltd, and Koninklijke Philips N.V.

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