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The Demand for Affordable and Accessible Healthcare boosts Innovative Telemedicine services in Southeast Asia

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"Southeast Asia's virtual health sector is estimated to see 10X growth between 2020 and 2025, with Singapore and Indonesia being the major markets, accounting for over half of the regional business" recapitulates Melvin Vu, Regional CEO of Good Doctor Technology

The pandemic has made virtual healthcare a new normal in Southeast Asia and the world, as many patients and clinicians superseded physical doctor visits by telehealth services. Now, as the majority of the Southeast Asian nations move to ease COVID-19 restrictions, telehealth presents itself as a game changer that is set to close the healthcare gap in the region.

Southeast Asia's virtual health sector is estimated to see 10X growth between 2020 and 2025, with Singapore and Indonesia being the major markets, accounting for over half of the regional business, according to research by RedSeer Consulting. Digital diagnostics, consultations, and pharmacy services are expected to account for 70% of the market.

An array of telehealth upstarts—including Good Doctor Technology, a joint venture of Ping An Good Doctor and Grab—are leading the tech revolution in primary healthcare that has long been plagued with pain points such as the scarcity of medical professionals, long waiting times, and access challenges.

Filing in Southeast Asia's healthcare gap

Most of the Southeast Asian countries are struggling with a relatively underdeveloped public healthcare system. In some of

the less-developed economies, facilities have been pushed to the brink of collapse during the pandemic.

Even prior to COVID-19, the region has been facing a shortage of trained healthcare professionals, with 0.6 physicians per 1,000 people, according to a report by Deloitte. The number of doctors per capita remains far behind developed economies such as Germany (3.7), the UK (2.8), and the US (2.4).

Healthcare facilities are also often concentrated in urban areas, which hinders rural populations from accessing high-quality care. Other problems include inadequate physical infrastructure and the lack of sufficient funding which is flowing towards essential services such as diagnostics and medical supplies. This complicates the problem, impacting the efficiency and quality of the care service, according to a paper published in the medical journal BMJ Innovations.

Virtual healthcare at the fingertips

With challenge comes opportunities. Several tech startups have risen to tap into the surging online health demands. While many of the tech platforms provide 24/7 teleconsultations, some go beyond virtual consulting to medication deliveries, physical checkup, chronic disease management, and mental wellness.

These services have made access to high-quality care easier than before, and patients, particularly those in rural areas or on small islands, do not have to travel all the way to major cities to receive quality support. All they need is a mobile phone that is equipped with cell signal or internet connection.

In Thailand, patients with asymptomatic and mild COVID-19 symptoms who need to quarantine, no longer have to sign up via the 1330 hotline and wait to be allocated to a hospital. Instead, they can register themselves via the SCB Spring Up mobile platform while they are quarantined at home, where they can receive outpatient care, teleconsultations, and medication. Each patient's condition is being monitored daily and the app can arrange hospital transfers if necessary.

In Indonesia, Good Doctor supports the Ministry of Health offering free consultation and medicine packages to patients with mild symptoms as part of the "Isoman" self-isolation program. The app saw a 6X increase in user growth during the country's COVID-19 waves. Use cases like this demonstrate the potential that health tech abounds with.

Telehealth further has the ability to relieve the burden of the public healthcare system by bringing non-emergency patients out of the medical facilities at a time of limited capacity, thus more resources can be allocated to those in need. Assuring the security of patient information is a critical part of it. In Indonesia, Good Doctor has recently been ISO27001-certified, recognising alignment with best practices in the space.

The building of a connected healthcare system

Telehealth is also gathering steam among policymakers and other parties like insurers, hospitals, and pharmacies, who would like to access the largely-underserved market. Healthcare-Software-as-a-Service (HSaaS) is one of the technologies that enable the myriad of stakeholders to host its telemedicine and digital health services directly on their platforms.

This approach carries ample opportunities—for example, participants can integrate data from different healthcare and wellness applications to map out the patient profile, or even detect potential COVID-19 infections via wearables, even before symptoms arise. The data will also be crucial to policy-making to review if more resources, education, and facilities are required to foster disease control in certain areas, according to research by Ernst & Young.

Consent-driven health data sharing will be the key when building a single loop healthcare ecosystem that acts as the digital front door for long-term health and wellbeing management.

With an aging population that is expected to increase to 20% by 2050, the demand for quality healthcare is set to grow. As tech upstarts, government, and other industry stakeholders tap on the massive market opportunities, it is time for us to think beyond teleconsulting. Health tech has the potential to leapfrog the healthcare challenges, and ultimately improve the quality of life in Southeast Asia.

Authour: Melvin Vu, Regional CEO of Good Doctor Technology, Singapore