Australia Telehealth Market Outlook Report - Market Size, Share Analysis and Forecast (2025-2034)

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Report description:

Australia Telehealth Market TrendsIn 2020 during the COVID-19 pandemic, the demand for physiotherapy services among Australians increased significantly, which prompted many physiotherapists to conduct online sessions with their new/old patients. As per the Australian Physiotherapy Association, clinics providing musculoskeletal training and sports exercises witnessed a steady demand from patients, apart from those providing training for the maintenance of pelvic health. People aged over 60 years constituted a share of nearly 30% in online physiotherapy consultations, most of which were done through video calls for an average duration of around 48 minutes. Nearly 60% of all patients reported pain relief post-online sessions, and 90% felt zero threat to their privacy and security. Nearly 88% of such patients paid for online physiotherapy services via private medical insurance and it was found that 74% of all patients were willing to pay extra for obtaining telehealth services. This indicates a positive trajectory of demand, which is expected to boost the Australia telehealth market revenue in the forecast period.Artificial intelligence-based tools are making rapid inroads into the healthcare industry. Major telemedicine providers are using AI tools to ensure accurate patient diagnosis before prescribing their medicines, which is expected to revolutionise the telehealth industry in Australia.Australia Telehealth Market GrowthThe Australian Institute of Health and Welfare conducted a National Study of Mental Health and Wellbeing (NSMHW) between 2020-2022. It reported that 43% of the Australian population suffered from a mental illness (8.5 million people) at some point during their lifetime. Anxiety disorder (3.4 million), affective disorder (1.5 million), and substance use problems (650,000) are the leading challenges faced by people mentally. 1 in every 7 adolescents in Australia aged between 4-17 years experienced a mental challenge during 2020-22. The Household Labour Incomes Dynamics in Australia suggests that the number of Australians being diagnosed with serious mental health conditions such as depression rose from 11% in 2009 to 19% in 2022. This is expected to raise the demand for remote healthcare services, including therapy sessions and formal medical consultations, thereby driving the Australia telehealth market expansion.By 2026, over 22% of the Australian population is expected to cross the age of 65. However, the aged care system in Australia remains chronically underfunded, despite receiving a budget of AUD $29.6 billion from the government in 2023. This is expected to raise the demand for telehealth services, as the demand for sustainable healthcare services for ageing people soars.Australia Telehealth Market Insights- Since 2020, over 86 million Australians have accessed telehealth consultations for resolving their health issues.- The Australian government has paid out over $4.4 billion for Medicare benefits to people accessing telehealth services.- By 2063, for every 5-working people, there can be 2 old age people to look after in Australia.Industry News May 2023 The Medical Board of Australia revised its telehealth guidelines to improve service quality and patient safety by setting stricter standards for healthcare providers. The new guidelines ensure secure data handling, informed consent, and proper clinical practices, protecting patients while promoting broader telehealth adoption across the country. July 2021 Eucalyptus, a leading provider of digital healthcare services in Australia, raised $22.3 million in a Series B funding round to introduce a portfolio of digital health solutions targeting primary care in Australia.Australia Telehealth Market Drivers Rising Adoption of Virtual Healthcare Services As per the Royal Australian College of General Practitioners, the proportion of GPs providing telehealth services to Australians surged from 13% to 99% post the COVID-19 pandemic. In 2021, a global study by Nuance revealed that one in four (27% of all) medical patients have started viewing virtual healthcare services as a preferred channel for receiving treatment over face-to-face appointments. Nearly 87% of all GPs have begun to display an increased preference for virtual healthcare tools such as telehealth over in-person patient visits since 2020. This is expected to drive the Australia telehealth market development.Australia's vast geography has made telehealth a lucrative choice for people living in far-flung areas to access high-quality healthcare at lower prices. Such virtual healthcare services not only reduce wait times for patients but also boost patient-doctor engagement through information exchange and the right medicine dosages. Increasing Government Investments in Telehealth Services In February 2024, the National Digital Health Strategy 2023-2028 was launched by the Australian federal government in collaboration with different states, healthcare providers, technology innovators, carers, research organisations, and consumers. The programme aims to enhance the accessibility and sustainability of healthcare services by promoting innovations in precision medicine. It also aims to ensure a safe, connected, and patient-centric experience. The introduction of such favourable government initiatives is expected to drive the Australia telehealth market expansion in the forecast period.In 2021, the federal government of Australia invested $309 million towards the development of telehealth services for the primary healthcare sector. To sustain the achievements of healthcare outcomes by telehealth facilities during the COVID-19 pandemic, the government invested $100 million to make telehealth a permanent part of the Australian healthcare system.Opportunities in the Australia Telehealth Market Rising demand for single-issue telehealth services Between July 2022 and March 2020, the Australian healthcare industry delivered 118.2 million telehealth services to nearly 18 million patients, with over 95,000 practitioners attending different consultations.Telehealth services have now become an essential part of Medicare facilities, which can be provided by GPs, nurses, specialists physicians, mental health professionals, and allied health providers. However, the demand for general medicine practitioners to treat single-issue services such as weight loss or smoking cessation has led to a significant increase in healthcare burden among GPs. This presents an exciting opportunity for private telemedicine providers who can design customised plans and prescriptions for an individual suffering from addiction to improve healthcare outcomes among them and capture the market share. The high degree of privacy and patient-centric care provided by doctors during telehealth consultations, apart from their quality and accessibility, is expected to favourably shape the Australia telehealth market trends and dynamics over the forecast period.Market DynamicsDuring the height of the COVID-19 pandemic in 2021-22, nearly one-third of all government spending on healthcare was directed towards primary care services ($84.1 billion), a large portion of which were delivered online. Nearly $13.6 billion was spent on boosting the accessibility of general practice services, while $12.6 was spent on providing essential medications. This was a year-on-year growth of 10.9%, indicating the increasing government expenditure on public and community health. As per the Department of Health and Aged Care, nearly $10.6 billion was paid for availing Medicare benefits for improving primary health outcomes, primarily including GP ($8.7 billion), allied health ($1.8 billion), and nursing practitioners ($89 million). Since the implementation of the federal government's decision to make telehealth a permanent part of the healthcare sector, the Australia telehealth market revenue is expected to record an upward trajectory in the coming years.Market RestraintsThe Australian government spends around 1.2% of its GDP on providing healthcare services to its ageing population, which is substantially lower than other high-income countries such as Denmark (4.3%). Across various intergenerational reports, the cost of providing aged care has risen substantially, which has driven a need for reforming the sector. The Australia telehealth market also faces the challenge of labour shortage, with the healthcare industry expected to demand an additional 285,800 professionals including experts and nurses by 2050. This is expected to create additional challenges surrounding the hiring and training of doctors, which need to be tackled strategically.The digital divide has emerged as an important problem for older generations in accessing telehealth services as they are comfortable with face-to-face consultations. Major Australian telehealth providers need to educate their consumers regarding the benefits and features of their offerings, which can bolster their adoption across a wide range of households and lead to the market growth.?Australia Telehealth Market Report and Forecast 2025-2034? offers a detailed analysis of the market based on the following segments:Market Breakup by Components- Software- Hardware??- HD??- Full HD??- Medical Peripheral Devices??- Monitors??- 4K/8KMarket Breakup by Types- mHealth (Mobile Health)- Tele Homes- Tele HospitalsMarket Breakup by Services- Allied Health Consultation- General Practitioner- Mental Health Consultation- Nurse Practitioner Consultation- Specialist ConsultationMarket Breakup by Region- New South Wales- Victoria- Queensland- Australian Capital Territory- Western Australia- OthersAustralia Telehealth Market Share By Component Analysis Based on component, the market is divided into hardware and software. Over the forecast period of 2024-2032, the software segment is estimated to grow at a CAGR of 17.2%, which can be attributed to the emergence of favourable socio-economic factors. This includes the increased preference for telehealth consultations among families with dependents which prioritise saving time and money. A pan-Australia survey of different people suggests that 56% of all people prefer making online appointments with their doctors and receiving information about their health reports via online channels including e-mails. Moreover, 38% of Australians contact their medical healthcare providers via SMS and email to clarify important health-related doubts. Nearly 37% of patients have telephonic consultations with their personal doctors and 34% use an online tool for diagnosis. This is expected to raise the demand for technologically advanced telehealth software solutions over the forecast period. By Types Analysis As per the Australia Institute of Health and Welfare, non-fatal illnesses account for 54% of the overall healthcare burden domestically. In 2023, the topmost diseases causing healthcare burden included neurological conditions, cancer, and cardiovascular diseases, among others. Chronic diseases account for nearly 64% of the overall health burden in Australia. This is expected to increase the demand for tele hospitals over the forecast period.In Australia, the prevalence of diseases between men and women varies significantly. While women are at a greater risk of suffering from anxiety disorders and dementia, men are at a higher risk of self-inflicted injuries and coronary diseases. As per the Australia telehealth market analysis, men are 2x more likely to suffer from diseases as compared to women. This is expected to increase the demand for tele homes among men in the country in the forecast period.Between 2003 and 2023, the burden of non-fatal injuries in Australia surged by nearly 15%. This is expected to prompt increasing investments towards enhancing mHealth accessibility to a majority of the population, thereby driving the market growth. By Services Analysis The availability of Medicare-subsidised primary healthcare care services in Australia rose from 185 million in 2018-19 to 197 million in 2022-23. This can be attributed to a 5% increase in the number of GP attendees (now 166 million), an 11% increase in allied healthcare providers (now 27 million), and a 21% increase in the demand for services provided by Aboriginal healthcare workers and nurse practitioners (now 4.3 million). This is expected to favourably shape the Australia telehealth market dynamics and trends.With the increasing incidence of mental health disorders in Australia, the demand for mental health experts providing online support services is expected to soar rapidly. This includes therapy sessions for major challenges such as depression, mood disorders, bipolar disorder, and schizophrenia, among others. Moreover, the increasing incidence of chronic diseases such as cancer, HIV, and TB is expected to increase the demand for remote consultations with specialist doctors.Australia Telehealth Market Regional InsightsThe presence of strong healthcare systems, advanced digital infrastructure, and high levels of government support has made New South Wales and Victoria regional leaders in the Australia telehealth market. The integration of virtual tools into existing services has substantially boosted patient convenience and reduced in-person visits to hospitals.Due to their expansive geography, Queensland and Western Australia have witnessed rapid adoption of telehealth tools, including remote diagnostics and monitoring systems. In the Northern Territory, inadequate healthcare infrastructure and low accessibility of qualified doctors have led to an increase in the demand for telehealth consultations for chronic diseases. In South Australia and Tasmania, government initiatives are expected to spur the adoption of telehealth services, thereby driving market growth.Australia Telehealth Market Regional AnalysisThe demand for telehealth facilities in Australia exhibits significant regional variations. In remote rural areas, encompassing Western Australia, Queensland, and the Northern Territory, the adoption of remote consultation tools is being driven by the demand for improved healthcare access, which is difficult given Australia's complex geography. However, in densely populated areas of Victoria and New South Wales, technological advancements have led to the emergence of novel solutions such as mHealth and tele homes, which are driving the Australia telehealth market growth.Competitive Landscape Instant Consult was founded in 2018 and is headquartered in Queensland. It provides online medical consultation services to people, apart from specialist referrals, blood tests, and radiology and pathology services. Respiri Ltd. is headquartered in Melbourne, Victoria. It has a significant presence in the MedTech sector and the remote patient monitoring industry. It is engaged in improving the healthcare outcomes among patients suffering from chronic diseases through innovative technologies. Cardiex Ltd. was founded in 2005 and is headquartered in Sydney. It is a medical equipment manufacturing company which also provides digital solutions for managing hypertension and vascular health disorders. Updoc was founded in 2020 and is headquartered in Sydney (New South Wales). It is engaged in providing online medical consultations to people across Australia and aims to reduce the annual loss of $33 billion suffered by organisations due to issues of unresolved sick leaves.Key Industry PlayersOther key players in the Australia telehealth market report include DOCTO, Connected Medical Solutions Limited, Eucalyptus, and InstantScripts Pty Ltd., among others.Recent Developments May 2024 Updoc attracted an investment of $20 million from Bailador Technology Investments to develop market-leading technologies, create new product roadmaps, and drive sustained expansion. January 2022 Eucalyptus, an Australian digital health startup, raised $60 million for its overseas expansion plans in a series of funding rounds led by Bond Capital, while including repeat backing from New View Capital, Blackbird, OneVentures, Woolworths' W23 Ventures, AirTree, and Athletic Ventures.

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