

VIETNAM

**STADA HEALTH
REPORT 2024**

by STADA PYMEPHARCO

Vietnam's Health Pulse: High Satisfaction, Higher Aspirations

Guided by people's health awareness and accessible care,
with eyes set on continuous improvement

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FOREWORD

It is with great pride and a deep sense of responsibility that we present the first edition of the Vietnam Health Report series, published by STADA Pymepharco, as part of the annual STADA Health Report. The Vietnam Health Report series aim to offer trusted insights on relevant healthcare topics, highlighting key healthcare issues, generating insights on how best to meet patients' needs. More importantly, the series align with our purpose "Caring for People's Health as a Trusted Partner" and our aim to provide "German standard" healthcare products in Vietnam and to the world.

As a sole wholly affiliate member of the STADA Group (Germany) in Vietnam since 2021, STADA Pymepharco is dedicated to contributing to the advancement of healthcare in Vietnam, building on the Group's long-standing tradition of trust and excellence.

This first edition reveals:

Robust Satisfaction with Calls for Enhancement:

Across Vietnam, most surveyed consumers show satisfaction with the current public health system, driven by high-quality care, affordable medication, and trust in the healthcare system. However, there is a tangible thirst for advancements in care, better access to necessary medications, and increased availability of hospital beds.

Heightened Health Awareness:

It is encouraging to see a surge in health consciousness with more people eating well, exercising regularly, and recognizing the worth of preventive health checks and supplements. Importantly, people are more prepared than ever to invest in quality healthcare services, showcasing a proactive approach to their health.

Demand for Comprehensive Pharmacy Services:

Our pharmacies are on the front lines, evolving from places that merely dispense medications to becoming centers that help people access more information about wellness and preventative care. The call for affordable medications, comprehensive health consultations, and expanded services like eye and hearing tests, which need to be accessible in-person and online, is clear.

Reflecting on the broader global perspective – as seen in past editions of the STADA Health Report – we are reminded that while our challenges may be local, the themes are universal. Healthcare systems around the world are being called to adapt and transform.

This report provides reference information for all of us. Whether you develop healthcare policies, prescribe medications, or provide care, every role is crucial. Let's take this scientifically validated data and turn it into constructive outcomes that can lead to lasting changes in how we provide healthcare in Vietnam.

I am thankful to each person who shared their thoughts for this report, and I look forward to our continued partnership. Together, we can build a future where our health system reflects our collective aim for excellence, inclusivity, and trust.

Philippe Gautron
General Manager Vietnam
- STADA Pymepharco



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**CARING
FOR
PEOPLE’S
HEALTH AS
A TRUSTED
PARTNER**
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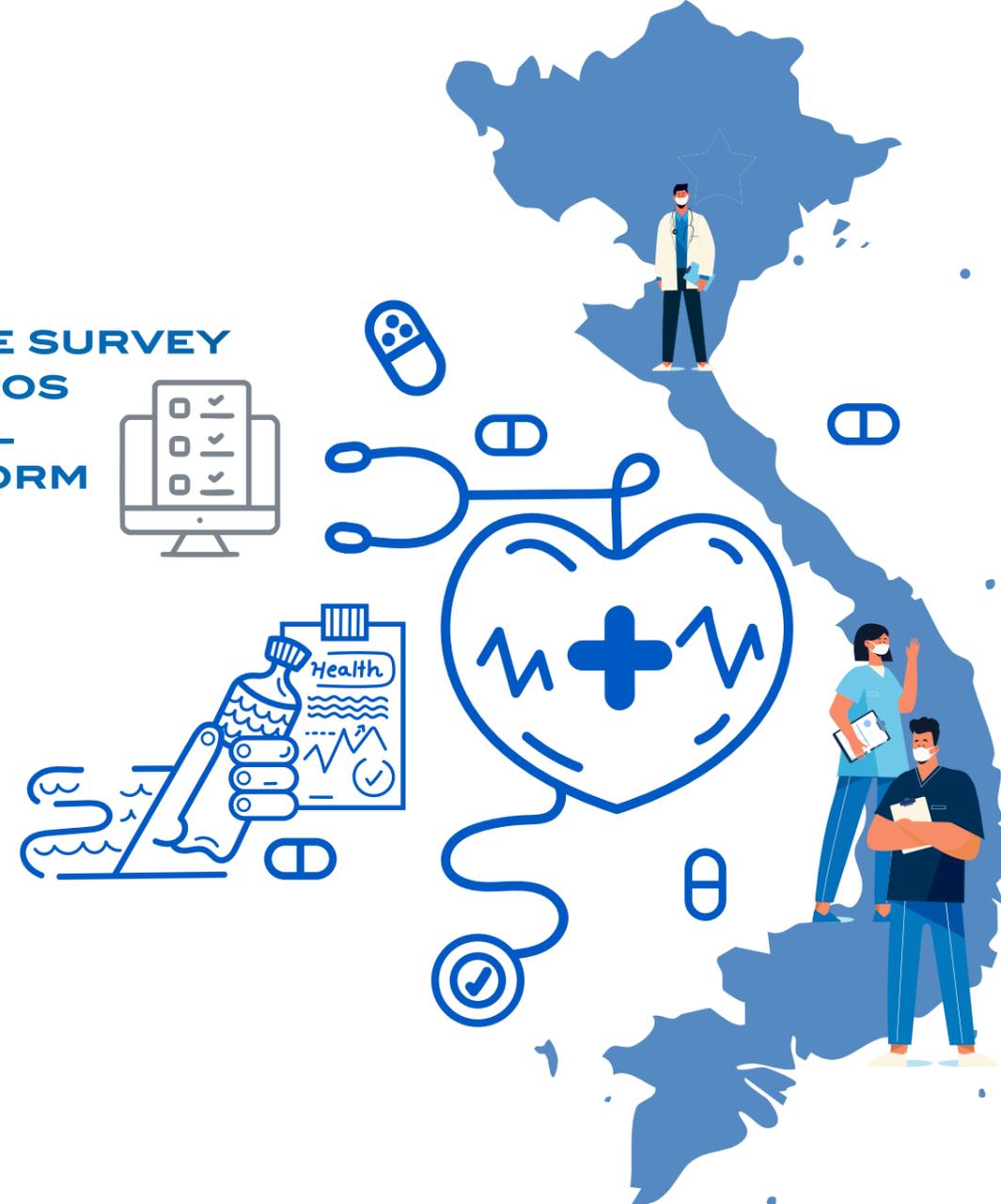
ONLINE SURVEY
VIA IPSOS
DIGITAL
PLATFORM



550
SAMPLES



6 REGIONS
ARE COVERED



VIETNAM HEALTH REPORT 2024

Objective and methodology

As a global leader in pharmaceuticals with over 125 years of expertise, STADA Group has substantially contributed to global healthcare not only by delivering top-quality pharmaceutical products but also by conducting and publishing several insightful and practically applicable studies. A notable example is the STADA Health Report, which has been conducted annually since 2014 by the STADA Group to explore a wide range of health-related topics.

Building on this foundation, STADA Pymepharco, a sole wholly-owned affiliate of STADA Group in Vietnam, recently conducted a study to analyse public satisfaction with the healthcare system in Vietnam and assess the population’s awareness of health-related issue.

Objectives

Since the onset of the COVID-19 pandemic, health awareness among the Vietnamese population has significantly heightened. Many Vietnamese people are now eager and willing to invest in superior healthcare experiences. This shift is expected to transform public perceptions and evaluations of Vietnam’s public healthcare system. The study aims to measure the current level of public satisfaction with the healthcare system, identifying its strengths and pinpointing areas for improvement. Additionally, the research will provide analyses of trends in public awareness and expectations concerning the healthcare sector.

Methodology

The study was conducted based on the results of a survey carried out by Ipsos Vietnam in September 2024 using the Ipsos Digital platform. The survey focused on collecting samples from 6 key socio-economic regions in Vietnam: Northeast, Red River Delta, North Central, South Central, Southeast, and Mekong River Delta. The data collected gathered responses from 550 participants aged 20 to 75, all of whom had used healthcare services in the past 6 months and were the primary decision-makers regarding healthcare facilities for themselves or their family members. The questionnaire was designed to be completed in 5 minutes and covered topics such as satisfaction with the public healthcare system, expectations of pharmaceutical providers, and activities aimed at enhancing personal health among the population. While the sample provides valuable insights, it represents a limited view affected by selection criteria, and the results should be interpreted with caution regarding their application to the entire Vietnamese population.

Executive summary

1 84% of Respondents Satisfied with Public Healthcare

- 28% very satisfied
- 56% satisfied

This satisfaction is driven by high-quality care, affordable medication, and trust in the healthcare system.



2 Though, there are still some limitations to be recorded...

Dissatisfaction has highlighted for some key improvement areas for public healthcare system in Vietnam including:

-  **54%** substandard quality of care
-  **41%** difficulties in accessing medication
-  **34%** challenges in securing hospital beds

3 Highlighting areas for further improvement

Vietnamese people are calling for sustainable advancements in healthcare, including ensuring that policymakers have the management capacity and/or expertise to effectively carry out their duties at each management level, expanding the roles of pharmacists, boosting salaries and training for healthcare professionals, and enhancing domestic drug production to lower costs and improve access.



4 Vietnamese people are now more concerned about their health

Almost 93% of target respondents reported taking specific actions to maintain or enhance their personal well-being, with popular methods including a healthy diet, exercise, preventative health check-ups, and dietary supplements. Meanwhile, only 7% stated that they do little or nothing for their well-being, mainly due to time constraints, cost, and a lack of knowledge about self-care.

5 Vietnamese people are now willing to pay for better quality of healthcare

92% of target respondents expressed their willingness to pay for better healthcare quality, with 42% indicating they would contribute more through taxes and contributions, while 50% stated they would pay more out of pocket.



6 Key lessons learned for healthcare providers

Key takeaways for healthcare providers emphasize the growing consumer demand for better quality care in public health facilities. This includes easier access to necessary medications and an adequate supply of hospital beds. Additionally, the evolving role of pharmacists in sharing responsibilities with doctors is an important consideration. For pharmaceutical companies, addressing concerns about high medication prices is essential; localizing production can help alleviate this issue. Moreover, with increasing health awareness and a focus on personal well-being, companies should consider expanding the range of dietary supplements to meet rising consumer demand. Collaborating with pharmacists and doctors to better educate consumers on the benefits of these products is also crucial.

Chapter 1

Satisfaction level & Areas for improvement

In this study, we explore that Vietnamese people report a high satisfaction with the public healthcare system, valuing accessible service, essential care, and affordable medication options. As health awareness grows, they are more willing to pay for higher-quality services, demand greater expertise from healthcare professionals, and investment in medical technology. However, people are also seeking for areas to be improved, including: ensuring that policymakers have the capacity and expertise to effectively carry out their duties at each management level, expanding pharmacists' roles, increasing support for medical staff, and spurring domestic drug production to lower medication prices. Higher satisfaction reflects a shift towards higher expectations and a readiness to invest in better public healthcare services in the future.

The Public Healthcare System in Vietnam Receives A High Level of Positive Satisfaction



84%
of target consumers expressing either satisfaction or high satisfaction

Summary

In recent years, Vietnamese people have expressed positive views about the public healthcare system, driven by significant improvements and anticipated developments in out-of-pocket services in the public sector. Key drivers of this high satisfaction include quality doctor consultations, reliable medical advice, reasonable reimbursement options for medications, and increased trust in healthcare policymakers. Lifestyle changes are also a key component of the growing demand for higher-quality services in Vietnam, particularly among younger individuals (20-27 years old) who show a preference for private healthcare options. Meanwhile, the older generation (45-75 years old) prefers the accessible and affordable services of the public healthcare system.

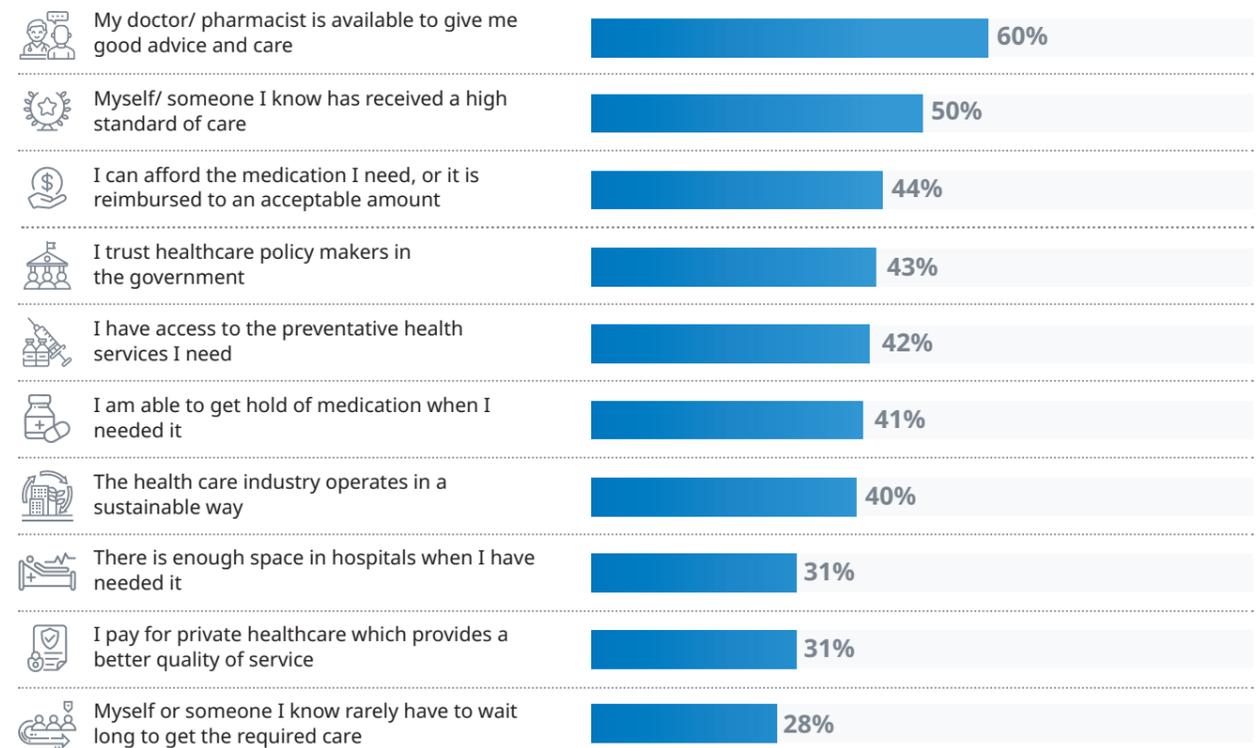
High satisfaction with public healthcare system

The positive satisfaction of 84 percent of Vietnamese respondents with the public healthcare system highlights a favorable public perception of the Vietnamese healthcare system, likely due to recent improvements in healthcare quality and access.

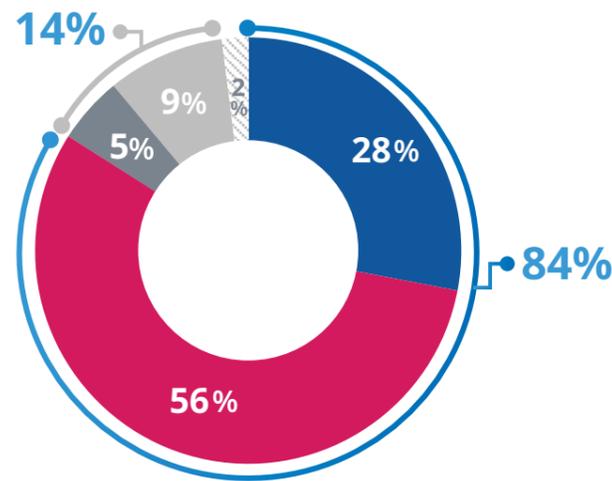
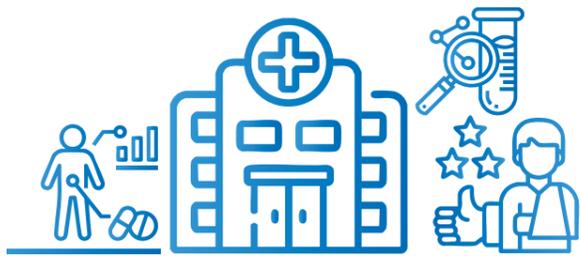
Specifically, 28 percent rated their experience as very satisfied, while 56 percent of respondents reported being satisfied, which indicates that there are areas that could be improved to better satisfy this group with the healthcare system. On the other hand, a smaller portion expresses lower satisfaction levels, with 16 percent represented. Among them, 2 percent were neutral, 5 percent were dissatisfied, and 9 percent were very dissatisfied. This distribution suggests a generally positive perception of the healthcare system, though there is still room for improvement.

This positive outlook is driven by many factors

60 percent of respondents feel that they could receive valuable doctor's advice. High standard of care (50%) and affordable reimbursement for medication (44%) are the top 2 and 3 drivers, respectively. In addition, 43 percent of respondents also express their trust in healthcare policymakers in the government. Besides the availability of medication when needed (41%) and sufficient space or hospital beds in healthcare institutions (31%), there are emerging drivers involving sustainable operations (40%) and private services (31%) in the healthcare system that affect their satisfaction.



Overall Satisfaction

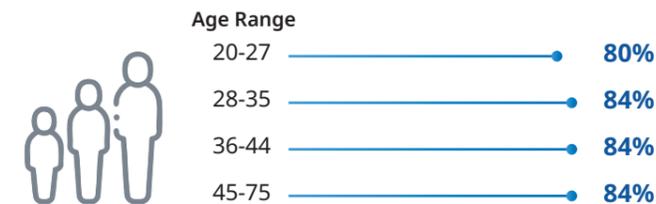


Very satisfied Satisfied Neutral Dissatisfied Very dissatisfied

Vietnam's satisfaction with the public healthcare system surpasses EU's average, signaling growth potential

The high satisfaction of Vietnam's public healthcare system (84%), indeed, is a noteworthy sign of its ongoing development and improvement. Specifically, when compared to countries in the European Union, the latest STADA Health Report 2024 indicates that the average satisfaction level among citizens in European countries is only 56%, with Hungary, Kazakhstan, and Serbia having the lowest satisfaction rates at 28%, 33%, and 35%, respectively, this rate has been declining since the outbreak of COVID-19. This high level of satisfaction in Vietnam highlights the development opportunities for the country's public healthcare system in the future, bolstered by strong support and trust from the population.

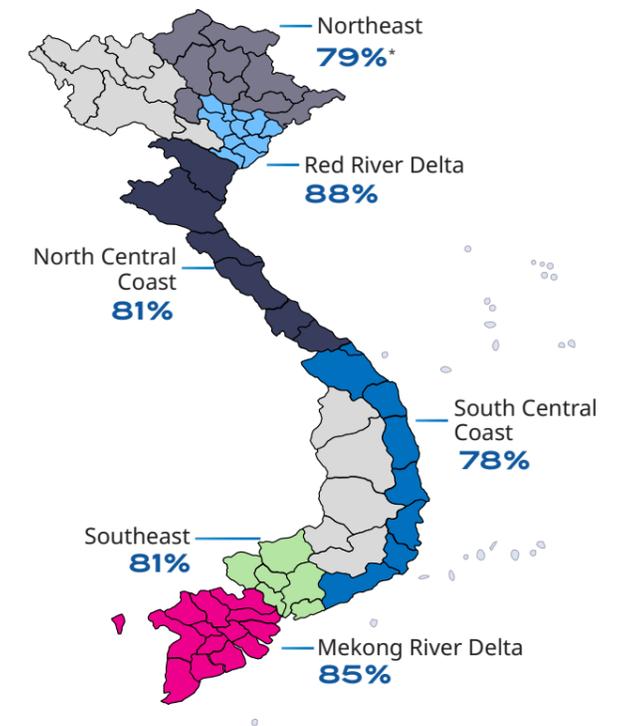
Age-related disparities in healthcare satisfaction reveal areas for improvement



While overall satisfaction with Vietnam's public healthcare system remains high across all age groups, a closer look reveals disparities. Indeed, respondents in the 20-27 age group have the lowest satisfaction level with the public healthcare system compared to the other three age groups. People in this age group tend to prefer private healthcare, as they believe these facilities offer better quality of service.

Regional healthcare satisfaction varies slightly across areas

The Red River Delta recorded the highest satisfaction level, with 88% of respondents expressing satisfaction. This positive result is largely contributed by the high quality of doctor's consultation, good healthcare services, and the trust in government health policies. Meanwhile, in the South Central Coast region, the satisfaction level recorded is the lowest among the six surveyed areas, at only 78%. The most common dissatisfaction cited is the overload of public healthcare facilities, leading to long waiting times. Indeed, according to the latest statistics from the General Statistics Office and the Ministry of Health at the end of 2022, the number of doctors per 10,000 people in the South Central Coast region was only 7.3, while the national average stood at 11.5 doctors.



(*): The percentage represents the portion of positive satisfaction in each region.

However, there is some room for further improvement...

While the satisfaction level is high, it is not the best scenario that the public healthcare system in Vietnam can achieve, as there are still many aspects that can be enhanced to further increase the level of satisfaction.

In fact, the survey indicates that 16% of participants expressed they are not truly satisfied with the current public healthcare system, including 2% who are neutral, 5% who are dissatisfied and 9% who are very dissatisfied. The reasons for this dissatisfaction stem from various factors, the most common being the failure to receive the desired quality of service (54%), issues related to accessing medications (41%), and limitations regarding insufficient hospital beds (34%). Notably, individuals in the 45-75 age group reported greater concerns with the quality of service and access to medications, while those in the 36-44 age group also highlighted difficulties in obtaining medications.

These barriers highlight areas for improvement within the public healthcare system to boost future public satisfaction.

Healthcare providers need to implement comprehensive strategies, such as staff training to enhance skills and adopting patient-centric care models that focus on individual needs and encourage active patient involvement, to improve the quality of medical services. Additionally, the issue of access to prescribed medications poses an urgent challenge for pharmaceutical companies to increase drug supply and help to improve product pricing, thereby enhancing accessibility for the population. Furthermore, the low density of hospital beds has long been a pressing issue that requires collaboration between government authorities and healthcare facilities for improvement.

Alongside the areas for improvement identified from the reported barriers, the survey also sought participants' opinions on their expectations for the public healthcare sector in the future. Participants emphasised the importance of ensuring that policymakers have the capacity and expertise to effectively carry out their duties at each management level, which accounted for 65% of responses. Meanwhile, expanding the role of pharmacists in providing health consultations alongside doctors was also a significant concern, accounting for 61%. This stems from the role of pharmacists as gatekeepers in Vietnam's culture, where people often visit neighborhood pharmacists for non-urgent health matters.

16%
express their dissatisfaction with the public healthcare system



54%
Myself or someone I know has received a poor standard of care

41%
I have had issues with accessing medication currently/in the past

34%
Myself or someone I know has had issues getting a bed while in hospital



Interestingly, respondents aged 36-44 ranked the first two proposals (Ensuring policymakers' expertise and Expanding pharmacists' role in supporting doctors) the highest, with 69% and 72% respectively. This suggests that this age group places a high value on experienced and well-trained healthcare professionals.

65%



Ensure that policymakers have the capacity and expertise to effectively carry out their duties at each management level

61%



Increase the scope of responsibility that pharmacists have to support doctors

53%



Increase pay for people working in the medical profession to attract more personnel

51%



Increase the production of medicines in my country, rather than importing them

Chapter 2

Health Consciousness & Personal Wellbeing

In this section, we delve into the growing trend among Vietnamese people towards sustainable well-being and explore their readiness to prioritise health for a healthier future. Findings show that rising health consciousness is driving a shift toward preventive wellness practices—balanced diets, regular exercise, health checkups, and dietary supplements among Vietnamese people. This proactive approach, along with their increasing willingness to invest in premium healthcare services, highlights a growing commitment to achieving better health and well-being.

Vietnamese people are now more concerned about their health



Key implementation for healthcare providers

Many Vietnamese are increasingly prioritising their health through practices like healthy eating (65%), regular exercise (62%), or taking dietary supplements (43%). However, approximately 7% of respondents reported doing little or nothing to improve their personal health, primarily due to lack of time (38%), high costs (33%), and insufficient knowledge (33%). To bridge this gap, healthcare providers should launch educational campaigns that further promote these healthy practices, with guidance from nutritionists and fitness experts. These initiatives could also offer practical tips for creating balanced meals and quick, effective workouts that fit busy schedules. Additionally, providing low-cost or free resources—such as nutrition workshops and group exercise classes—can reduce financial obstacles and empower people with knowledge for better health choices. By addressing these barriers, healthcare providers can create an environment where well-being is accessible and sustainable for all.



92%

of target respondents stated that they are willing to pay for a better quality of healthcare



47%

of respondents indicated that a 'general health check-up' was the healthcare service they used in the past 6 months, making it the most utilized service during this period



As interest in dietary supplements grows (43%) and more people express a willingness to pay for higher-quality healthcare services (92%), healthcare providers have an opportunity to meet this demand by expanding their range of supplement products. However, they should also consider barriers like limited time (38%) and lack of guidance (33%) that often prevent people from taking action to improve their well-being. Additionally, healthcare providers can partner with pharmacies and doctors to offer accessible consultations on supplements. This approach makes it easier for people to get professional advice, building trust and simplifying the decision-making process.



Chapter 3

Enhance pharmacy services

Currently, the trend in accessing pharmaceutical products is shifting from merely treating illnesses to focusing on prevention as a result of increased public awareness regarding health issues. Moreover, consumers express a desire for a wider range of healthcare services and pharmaceutical products at more affordable prices. Pharmacies are now expected not only to act as point of sales for medicines but also to offer supplementary healthcare services, such as hearing and vision tests, through in-person consultations and online advice. These changes and expectations from the public have created opportunities for pharmaceutical providers to expand roles and enhance customer experience in the healthcare sector in Vietnam.

Vietnamese people are now demanding enhancements in pharmacy services, with a shift toward wellness and preventative care



Higher demands and expectations for healthcare providers

Along with the increasing awareness of health-related issues among the Vietnamese people, higher demands and expectations for healthcare providers are inevitable. For healthcare facilities, consumers express a desire for access to high-quality services, for pharmaceutical providers such as pharmaceutical companies and pharmacies, Vietnamese consumers now expect these entities to expand their roles and engage more in health consultations for patients.

Indeed, consumers today want pharmacists to provide more detailed information about prescribed medications, including specific advice on usage and dosage (53%).

Additionally, consumers have expressed their expectation for pharmaceutical manufacturers and suppliers to enhance their investment in technology to improve the customer experience (51%). In detail, pharmaceutical manufacturers and suppliers could collaborate to create mobile applications and websites where consumers can easily find information related to the medications they are prescribed or would like to use. Investing in these technological solutions would also increase interaction between customers and pharmaceutical providers through online consulting services.

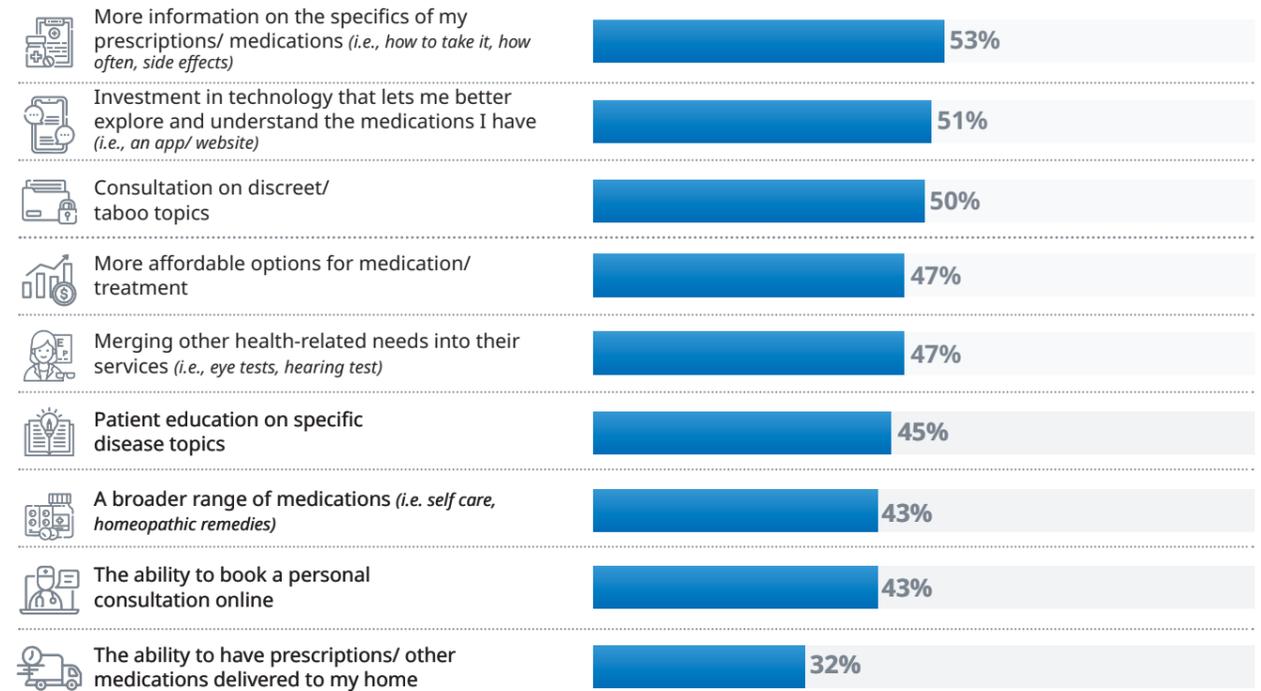
This perspective opens up new collaboration opportunities for pharmaceutical providers in communicating information to consumers. At the same time, pharmaceutical companies could partner with pharmacies to develop products based on identified market needs. For instance, pharmaceutical companies and pharmacies can collaborate to create health management programs that include educational materials and patient support tools—such as brochures and personalized health plans—that assist patients in managing their conditions and understanding their treatments.

Moreover, consumers also seek consultations from pharmacists regarding sensitive and discreet topics such as issues related to mental health, sexual health (50%). Affordable pricing remains one of the factors that consumers mention as they hope for more options for medications at reasonable prices (47%).



Summary

The evolving role of pharmacists is increasingly centered around meeting patients' fundamental needs, such as offering more comprehensive consultations for diseases and prescriptions, either through direct interaction with pharmacists or via online platforms (Zalo, mobile app, website, etc.). Vietnamese people now expect to receive more affordable medication and treatment options in pharmacies. Furthermore, there is a growing expectation for pharmacists to expand their role by offering consultations on sensitive or taboo topics, including mental health, sexual health.



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by STADA PYMEPHARCO

Author

STADA Pymepharco

Level 5, Pearl 5 Tower - 5 Le Quy Don, Ward 6, District 3,
Ho Chi Minh City

Telephone: +84 287 101 3505

Email: pymepharco.office@stada.com

Website: <https://www.linkedin.com/company/stada-pymepharco/>

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Media Relations:

Please contact Public Affairs & Communications Department

Email: minh.buihong@stada.com; an.hoanglethanh@stada.com

STADA Pymepharco

5 Le Quy Don, District 3, HCMC

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