Vietnam Long-term Care Software Market, By Application (Electronic Health Records (EHR), Electronic Medication Administration Record (eMAR), Revenue Cycle Management (RCM), Resident Care, Staff Management, Others), By Mode of Delivery (Cloud based, Web based, On premise), By End User (Home Healthcare Agencies, Hospice & Palliative care, Nursing Homes, Assisted living facilities, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Report description:

Vietnam Long-term Care Software Market was valued at USD 12.23 Million in 2024 and is anticipated to project robust growth in the forecast period with a CAGR of 11.45% through 2030. Vietnam's long-term care software market is undergoing rapid expansion, fueled by the country's aging population and the rising demand for advanced healthcare management systems. The Vietnamese government's strategic focus on digital health transformation and infrastructure enhancement has accelerated the adoption of specialized long-term care software. This market is set for sustained growth, underpinned by demographic trends and technological advancements in healthcare delivery.

A notable driver of this momentum is the widespread implementation of Electronic Health Record (EHR) systems, which streamline care processes and improve service quality. Additionally, targeted government policies designed to modernize healthcare practices are fostering a favorable environment for market innovation, positioning Vietnam as a key player in the evolving global landscape of long-term care solutions.

Key Market Drivers

Increasing Aging Population

The increasing aging population in Vietnam is a fundamental driver of the growth of the long-term care software market. As the

country experiences a demographic transition, the rising proportion of elderly individuals is creating a substantial demand for enhanced healthcare services and efficient management solutions. Vietnam is experiencing one of the fastest rates of population aging globally. In 2019, individuals aged 60 and above represented 11.9% of the total population, a figure projected to exceed 25% by 2050. By 2036, Vietnam will transition from an "aging" society to an "aged" society, marking a significant demographic shift that will require targeted strategies to address the evolving healthcare and social needs of an increasingly elderly population. There is a sharp increase in the need for specialized healthcare services tailored to the elderly. This demographic group often requires long-term medical attention for chronic conditions such as diabetes, hypertension, and cardiovascular diseases, which necessitates advanced care coordination. Long-term care software plays a pivotal role in managing patient records, streamlining care delivery, and ensuring consistent monitoring.

As the elderly population grows, healthcare providers face challenges in managing a vast amount of patient data. Long-term care software, such as Electronic Health Records (EHR) systems, enables efficient data storage, retrieval, and analysis. These systems support real-time tracking of health metrics, medication schedules, and treatment plans, ensuring that elderly patients receive personalized and timely care. The aging population places additional pressure on hospitals, nursing homes, and assisted living facilities, leading to a greater need for automation and efficiency. Long-term care software solutions help facilities optimize workflows, allocate resources effectively, and reduce administrative burdens. By automating routine tasks and improving operational efficiency, these solutions allow caregivers to focus more on patient care. Elderly individuals are more likely to suffer from chronic illnesses that require ongoing care and monitoring. Long-term care software integrates tools for chronic disease management, such as medication tracking, vital sign monitoring, and telehealth capabilities. These features improve health outcomes by ensuring adherence to treatment plans and enabling early detection of potential complications.

Many elderly individuals prefer home-based or community care over institutionalized care. Long-term care software facilitates this preference by providing remote monitoring tools, caregiver scheduling, and family communication features. These capabilities enhance the quality of care delivered outside traditional healthcare settings, addressing the preferences of an aging population while reducing the strain on institutional facilities. The Vietnamese government recognizes the implications of an aging society and is actively promoting digital solutions to improve elderly care. Policies aimed at integrating digital health technologies, including long-term care software, are aligned with the growing needs of this demographic. This regulatory backing further accelerates the adoption of such solutions. The economic strain caused by an aging population on healthcare systems is prompting providers to seek cost-effective solutions. Long-term care software minimizes unnecessary hospital visits, automates administrative tasks, and ensures better resource utilization, thereby reducing overall healthcare costs. These economic benefits make it an attractive option for both public and private healthcare providers.

Rising Healthcare Expenditure

Rising healthcare expenditure in Vietnam is a key driver of the growth of the long-term care software market. As the government, private institutions, and individuals allocate increasing financial resources to healthcare, it enables the adoption of advanced technologies, including long-term care software, to improve the quality, efficiency, and accessibility of healthcare services. The increase in healthcare budgets allows hospitals, long-term care facilities, and home-care providers to invest in advanced digital tools. Long-term care software, such as Electronic Health Records (EHR), medication management systems, and staff scheduling platforms, is becoming a priority for institutions looking to modernize their operations and enhance patient care. Rising expenditures ensure these technologies are no longer cost-prohibitive for providers, driving widespread adoption. According to the Economist Intelligence Unit (EIU), Vietnam's healthcare expenditure reached approximately USD 18.5 billion in 2022, accounting for 4.6% of the nation's GDP. Coupled with a declining birth rate, the country's aging population is driving a surge in demand for healthcare services and products, creating both challenges and opportunities for the healthcare sector as it adapts to meet the needs of an increasingly elderly demographic.

Higher healthcare spending has led to significant infrastructure upgrades in Vietnam's healthcare sector. As facilities expand and modernize, there is a greater demand for integrated software systems to streamline operations and optimize resources. Long-term care software enables healthcare providers to efficiently manage growing patient volumes, staff, and facility operations, ensuring sustainable growth in care capacity. With increased financial resources, there is a shift from volume-based to value-based care, where outcomes and efficiency take precedence over the quantity of services provided. Long-term care software plays a critical role in achieving this transition by providing tools for real-time monitoring, predictive analytics, and

personalized care planning, all of which are aligned with value-based healthcare principles. Rising healthcare expenditure ensures providers can adopt these solutions without compromising their financial stability. As expenditure increases, healthcare providers are better positioned to invest in premium long-term care software solutions that offer advanced features such as telehealth integration, remote patient monitoring, and artificial intelligence-driven insights. These capabilities improve patient outcomes and operational efficiency, making them a natural choice for providers with expanded budgets.

Implementing and effectively using long-term care software requires proper training and technical support. Rising healthcare expenditure enables organizations to allocate funds for comprehensive training programs, ensuring healthcare professionals can maximize the benefits of these technologies. It also supports seamless integration of software into existing systems, minimizing disruptions and enhancing usability. The Vietnamese government has been increasing its healthcare budget as part of its commitment to improving public health. A significant portion of this budget is directed toward adopting digital health solutions, including long-term care software, to address the challenges of an aging population and chronic disease management. Subsidies, grants, and other financial incentives provided by the government encourage healthcare providers to embrace digital transformation. Rising income levels and an expanding middle class have led to increased private-sector investment in healthcare. Private hospitals and care facilities, driven by competition and patient expectations, are adopting cutting-edge technologies to enhance their services. Long-term care software helps these providers differentiate themselves in the market by offering superior patient management and care delivery systems.

Government Initiatives on Digital Health

Government initiatives on digital health are a major driver of the Vietnam long-term care software market, fostering an ecosystem that promotes the adoption of advanced healthcare technologies. These initiatives aim to modernize the healthcare sector, enhance patient outcomes, and improve operational efficiency. The Vietnamese government has prioritized digital transformation as a cornerstone of its healthcare policy. Programs such as the National Digital Transformation Program aim to integrate advanced technology into healthcare systems, including long-term care facilities. These policies incentivize healthcare providers to adopt solutions like long-term care software, streamlining care delivery and improving patient management. Vietnam has made significant strides in improving key quality of life indicators, including life expectancy, infant mortality, and access to affordable medications. These achievements reflect the government's focused efforts to modernize the healthcare system and enhance access to cost-effective care. Currently, Vietnam has successfully extended Universal Health Coverage (UHC) to 90% of its population, with plans to increase this coverage to 95% by 2025, underscoring its commitment to further advancing healthcare accessibility and equity.

One of the government's key mandates is the widespread implementation of Electronic Health Records (EHR) across healthcare facilities. EHR systems, a core component of long-term care software, enable seamless data sharing, efficient patient tracking, and comprehensive health monitoring. By mandating EHR adoption, the government drives demand for long-term care software, which includes integrated EHR functionalities. Government investments in upgrading healthcare infrastructure include the deployment of digital health tools in long-term care facilities. By allocating resources to equip hospitals, nursing homes, and community care centers with modern software solutions, the government ensures that these facilities can meet the demands of an aging population and manage chronic diseases more effectively. To accelerate the adoption of long-term care software, the government provides financial incentives such as subsidies, tax breaks, and grants to healthcare providers. These measures reduce the financial burden of implementing advanced software solutions, encouraging more institutions to integrate digital tools into their operations. This support makes it feasible for even smaller providers to adopt long-term care software.

Vietnam's healthcare policies emphasize telemedicine and remote monitoring as critical components of its digital health strategy. Long-term care software solutions often include remote monitoring capabilities, enabling healthcare providers to manage elderly and chronically ill patients effectively from a distance. The government's endorsement of telehealth initiatives directly drives the adoption of such software. The establishment of regulatory frameworks for data security, interoperability, and compliance supports the widespread use of digital health technologies. By setting clear guidelines for the deployment and use of long-term care software, the government creates a secure and standardized environment that builds trust among healthcare providers and patients. The Vietnamese government has fostered collaborations between public institutions and private technology providers to enhance the country's digital health capabilities. These partnerships facilitate the introduction of advanced long-term care software solutions while leveraging private-sector expertise and innovation. The PPP model ensures that digital transformation in

healthcare is both scalable and sustainable.

Key Market Challenges

Limited Digital Infrastructure

Vietnam's digital infrastructure, while improving, still faces gaps that hinder the widespread implementation of long-term care software.

Many rural and remote areas in Vietnam lack reliable internet access, which is essential for cloud-based long-term care software and telehealth solutions. Without stable connectivity, healthcare providers cannot fully utilize software features like remote patient monitoring or real-time data sharing. Smaller and underfunded healthcare facilities often rely on paper-based processes or outdated technology, making it challenging to transition to digital systems without significant upgrades. Existing healthcare systems in Vietnam are often fragmented, with limited interoperability between various software and hardware. Integrating long-term care software into these systems requires additional investment and technical expertise, which some providers may lack.

High Initial Costs and Budget Constraints

The financial barriers to adopting long-term care software are significant, particularly for smaller healthcare providers. Implementing long-term care software involves substantial upfront costs, including licensing, installation, and infrastructure upgrades. Many facilities, especially in the public sector, face budget constraints that limit their ability to invest in such solutions. Ongoing costs for software maintenance, updates, and staff training can strain the budgets of care facilities. Without government subsidies or financial support, many providers may delay or avoid adoption altogether. Some healthcare administrators are hesitant to invest in long-term care software due to a lack of understanding about its long-term cost-saving benefits, such as improved efficiency and reduced errors.

Key Market Trends

Integration of Artificial Intelligence (AI) and Machine Learning (ML)

The incorporation of AI and ML into long-term care software is revolutionizing how care is delivered and managed, paving the way for smarter, more efficient solutions.

AI-powered software can analyze patient data to predict potential health issues, enabling early intervention and reducing hospitalizations. For example, predictive models can identify patterns in elderly patients' vital signs that signal a risk of falls or chronic disease complications. ML algorithms allow software to create highly customized care plans based on a patient's unique medical history, preferences, and real-time health data, improving care outcomes and patient satisfaction. AI-driven automation, such as medication reminders and task scheduling, enhances operational efficiency by freeing caregivers to focus on more critical aspects of patient care. This trend is particularly appealing to facilities looking to manage increasing workloads.

Expansion of Telehealth and Remote Monitoring Capabilities

The rising adoption of telehealth and remote patient monitoring solutions is transforming long-term care in Vietnam, driven by advancements in connectivity and consumer demand for convenient care options.

Telehealth-integrated long-term care software enables healthcare providers to monitor and consult with patients remotely, addressing accessibility challenges in rural and underserved areas. This aligns with Vietnam's efforts to bridge healthcare disparities across its regions. Wearable devices and IoT sensors are increasingly integrated with long-term care software, allowing caregivers to track patients' vital signs in real time. Alerts for abnormal readings improve response times and reduce emergency incidents. The preference for aging in place among elderly patients is driving demand for software that facilitates home-based care. Remote monitoring tools, combined with teleconsultation features, ensure patients receive high-quality care without requiring frequent facility visits.

Segmental Insights

Mode of Delivery Insights

Based on the category of Mode of Delivery, the Cloud-based segment emerged as the dominant in the Vietnam Long-term Care Software market in 2024. Cloud-based solutions offer significant cost advantages over traditional on-premises software, making them highly appealing to healthcare providers in Vietnam.

Unlike on-premises systems that require substantial investments in infrastructure, hardware, and IT personnel, cloud-based software operates on a subscription or pay-as-you-go model. This affordability is especially beneficial for smaller care facilities and

clinics with limited budgets. With cloud solutions, providers outsource system maintenance, updates, and security to the vendor, eliminating the need for in-house IT teams and minimizing operational costs. The cost-efficiency of cloud-based solutions has democratized access to advanced software, enabling adoption not only by large hospitals but also by smaller, resource-constrained care facilities.

Cloud-based software offers unmatched scalability, allowing healthcare providers to adapt quickly to changing patient needs and operational demands. As patient volumes grow or service offerings expand, cloud-based platforms can scale up without the need for additional physical infrastructure or significant downtime. This flexibility is crucial in long-term care facilities experiencing rising demand due to Vietnam's aging population. Many cloud solutions offer modular features, enabling providers to tailor the software to their specific needs. For instance, facilities can add functionalities such as remote monitoring, telehealth integration, or advanced analytics as their requirements evolve. These factors are expected to drive the growth of this segment.

Application Insights

The Electronic Health Records (EHR) segment is projected to experience rapid growth during the forecast period. EHR systems serve as the backbone for managing patient information, offering a unified platform to record, store, and retrieve health data. EHR solutions consolidate medical histories, medication lists, diagnostic results, and treatment plans into a single, easily accessible platform. This capability eliminates the inefficiencies of paper-based systems and fragmented records. By maintaining an up-to-date and centralized repository of patient information, EHR systems enable seamless care transitions between healthcare providers, enhancing the quality and continuity of care for long-term care patients. EHR software provides care teams with real-time access to critical patient data, empowering them to make informed decisions and deliver precise, evidence-based care.

Vietnam's government has prioritized healthcare digitization as part of its national development strategy, making EHR adoption a critical component for healthcare providers. The government's push for widespread adoption of EHR systems in hospitals and long-term care facilities ensures providers remain compliant with national health IT standards. Failure to adopt EHR systems may result in penalties or limited access to government funding. EHR solutions support integration with national health registries, enabling better population health management and streamlined data reporting for government health programs. Financial and technical support from the government encourages providers to implement EHR systems, further driving their dominance in the market. These factors collectively contribute to the growth of this segment.

Regional Insights

Southern region emerged as the dominant in the Vietnam Long-term Care Market in 2024, holding the largest market share in terms of value. The Southern region, especially Ho Chi Minh City, is the economic powerhouse of Vietnam. The concentration of both domestic and international businesses, as well as wealthier households, has fueled significant investment in healthcare infrastructure. Ho Chi Minh City houses a large number of private and public healthcare facilities, including specialized long-term care centers, nursing homes, and hospitals. This concentration of healthcare institutions drives demand for advanced management solutions such as long-term care software. The Southern region has seen substantial investment from both private healthcare providers and international healthcare companies looking to modernize facilities and implement state-of-the-art care management solutions. The local government in HCMC is proactive in supporting the digitalization of healthcare services. With a clear focus on improving healthcare delivery, it provides incentives, financial support, and regulatory frameworks that encourage the adoption of digital health tools, including long-term care software.

The Southern region, and particularly HCMC, leads the country in technological adoption, including in healthcare. The region is home to Vietnam's leading healthcare technology providers and has established itself as the testbed for new digital health initiatives. Healthcare facilities in this region are at the forefront of adopting integrated health solutions, including EHR systems and telemedicine platforms, which are integral components of long-term care software. HCMC has a more tech-savvy healthcare workforce compared to other regions in Vietnam, making it easier for facilities to adopt and manage complex software solutions. This enables faster and more efficient implementation of long-term care software. The presence of technology hubs and innovation centers in Ho Chi Minh City accelerates the development of healthcare technology, including long-term care software. Startups and established firms in this region are increasingly focused on developing and deploying tailored software solutions for long-term care.

Key Market Players

□□ALLSCRIPTS HEALTHCARE SOLUTIONS, INC

Cerner Corporation (Oracle)
Netsmart Technologies, Inc.
MatrixCare
Yardi Systems
PointClickCare
Report Scope:
In this report, the Vietnam Long-term Care Software Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:
Vietnam Long-term Care Software Market, By Application:
- Electronic Health Records (EHR)
- Electronic Medication Administration Record (eMAR)
- Revenue Cycle Management (RCM)
- Resident Care
- Staff Management
- Others

Vietnam Long-term Care Software Market, By Mode of Delivery:
- Home Healthcare Agencies
- Hospice & Palliative care
- Nursing Homes
- Assisted living facilities
- Others

Vietnam Long-term Care Software Market, By End User:
- Cloud based
- Web based
- On premise

Vietnam Long-term Care Software Market, By Region:
- Northern Vietnam
- Central Vietnam
- Southern Vietnam

Competitive Landscape
Company Profiles: Detailed analysis of the major companies present in the Vietnam Long-term Care Software Market.
Available Customizations:
Vietnam Long-term Care Software market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:
Company Information
Detailed analysis and profiling of additional market players (up to five).

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