

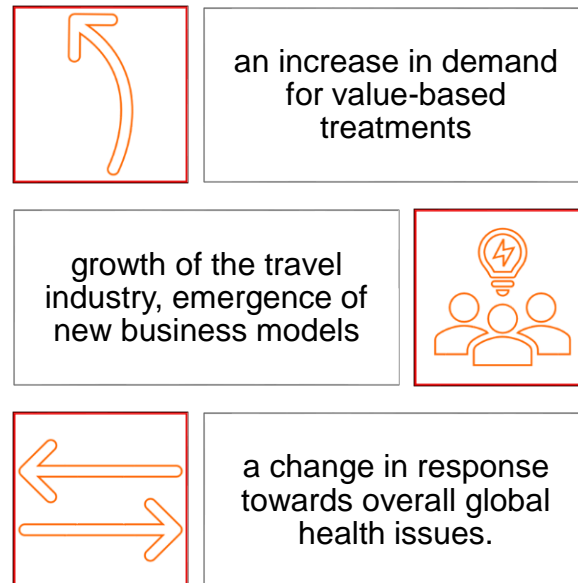
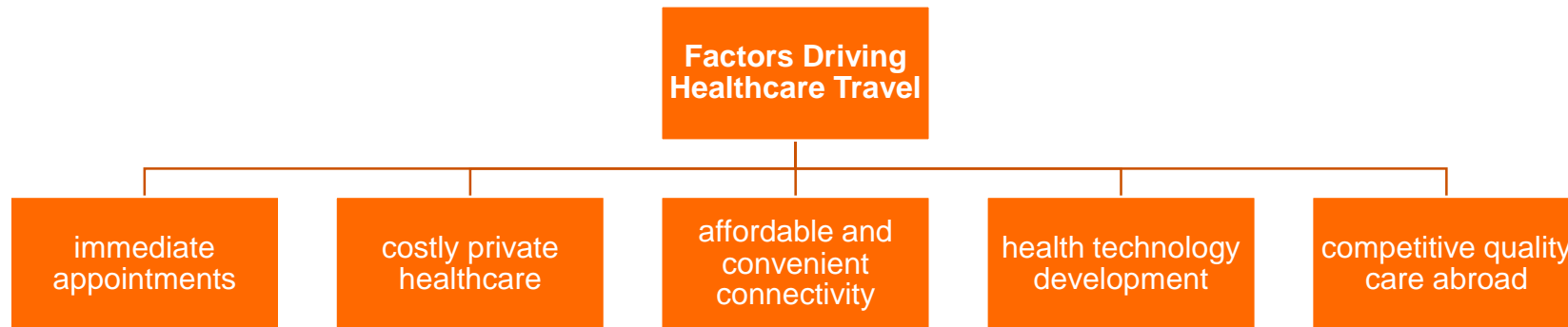


MEDICAL TOURISM INDUSTRY IN MALAYSIA

(Mohd Shahril Zainal - Malaysia)
(24 September 2020)

What is Healthcare Travel?

“Act of travelling for the purpose of receiving treatment for a disease, ailment or medical procedure or well-being and recuperation” – Deloitte, 2008



The general trend is that beyond just provision of healthcare, society’s increasing expectation is that healthcare must be easily accessible, affordable, of a high quality and sustainable over the long-term.

“more sophisticated healthcare services, there is a greater requirement for technology, equipment, more qualified healthcare professionals and ultimately rising costs.”

Malaysia Healthcare – Background & Landscape



Determination to profile the country as a preferred destination for healthcare, thanks to excess capacity



The government began roping in private sector players to tap the growing international market.



Policy decision - only the private medical sector for the healthcare travel market, while the public medical stream for serving 'the Rakyat'.



The effective public-private sector working relationship began to develop as a recognisable brand and accepted hallmark of high-quality medical care.



1. The Need for a Single Body and the Creation of MHTC

1. A Place in the Economy's Blueprint

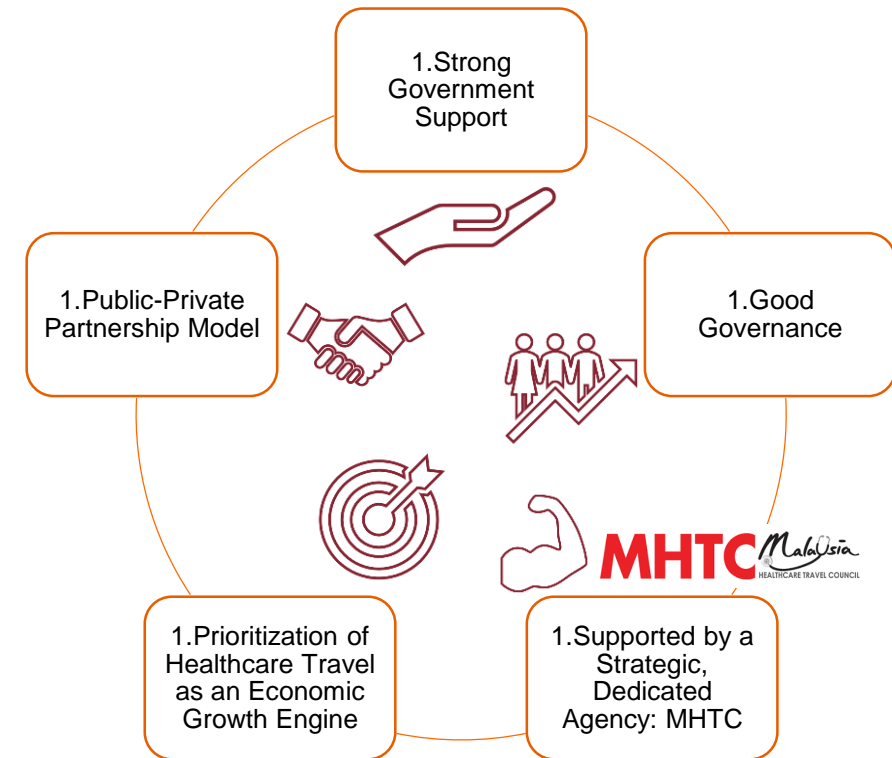
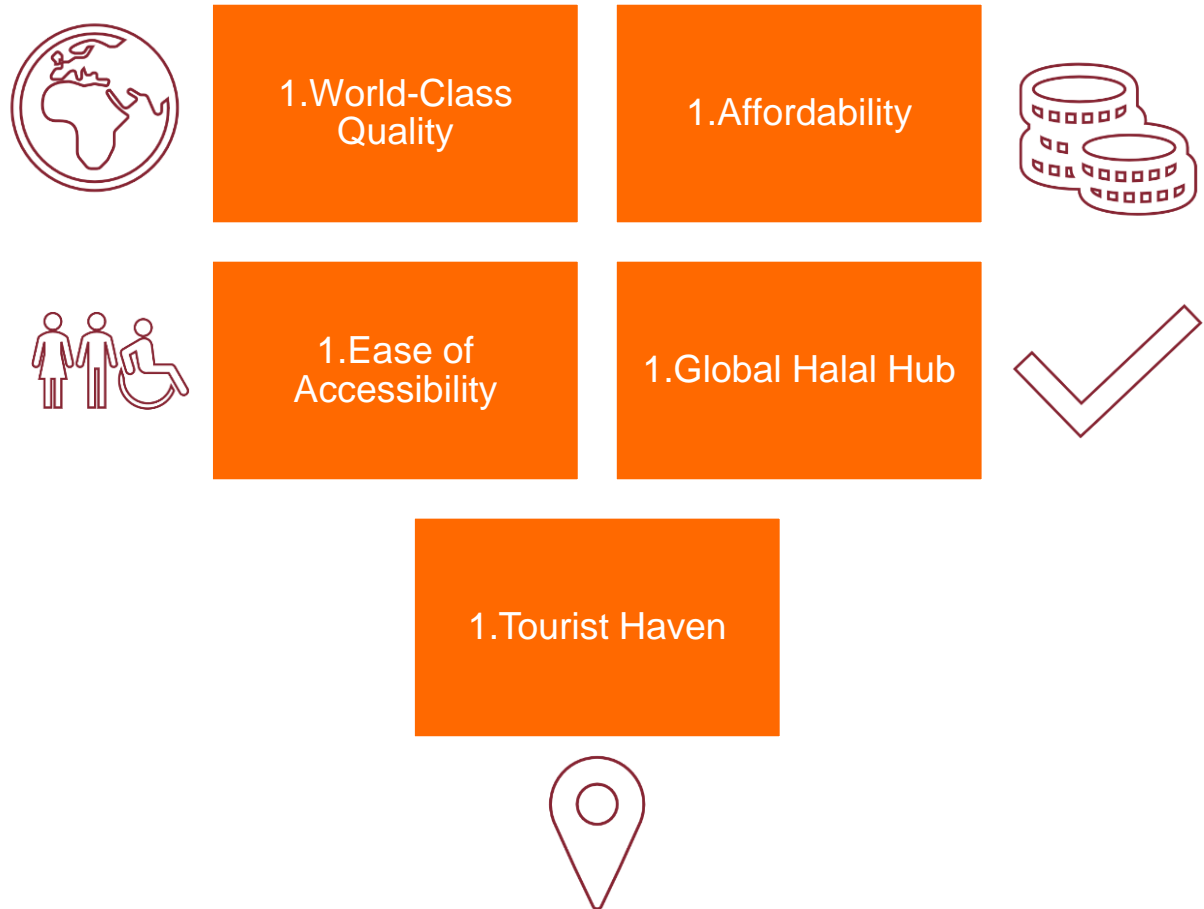


1. Malaysia Healthcare's Initiatives

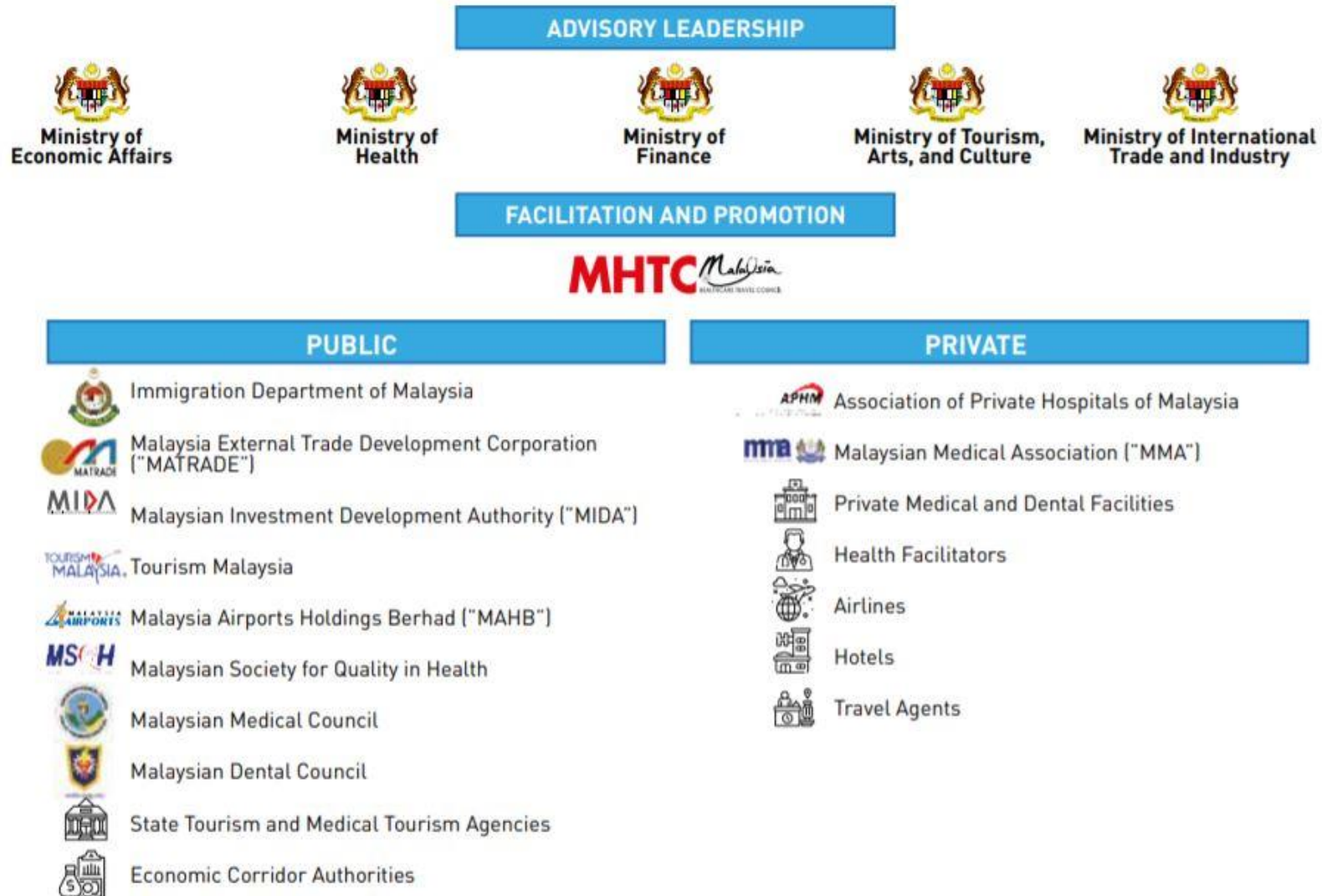
1. Malaysia:
2. A Unique Healthcare Destination for All



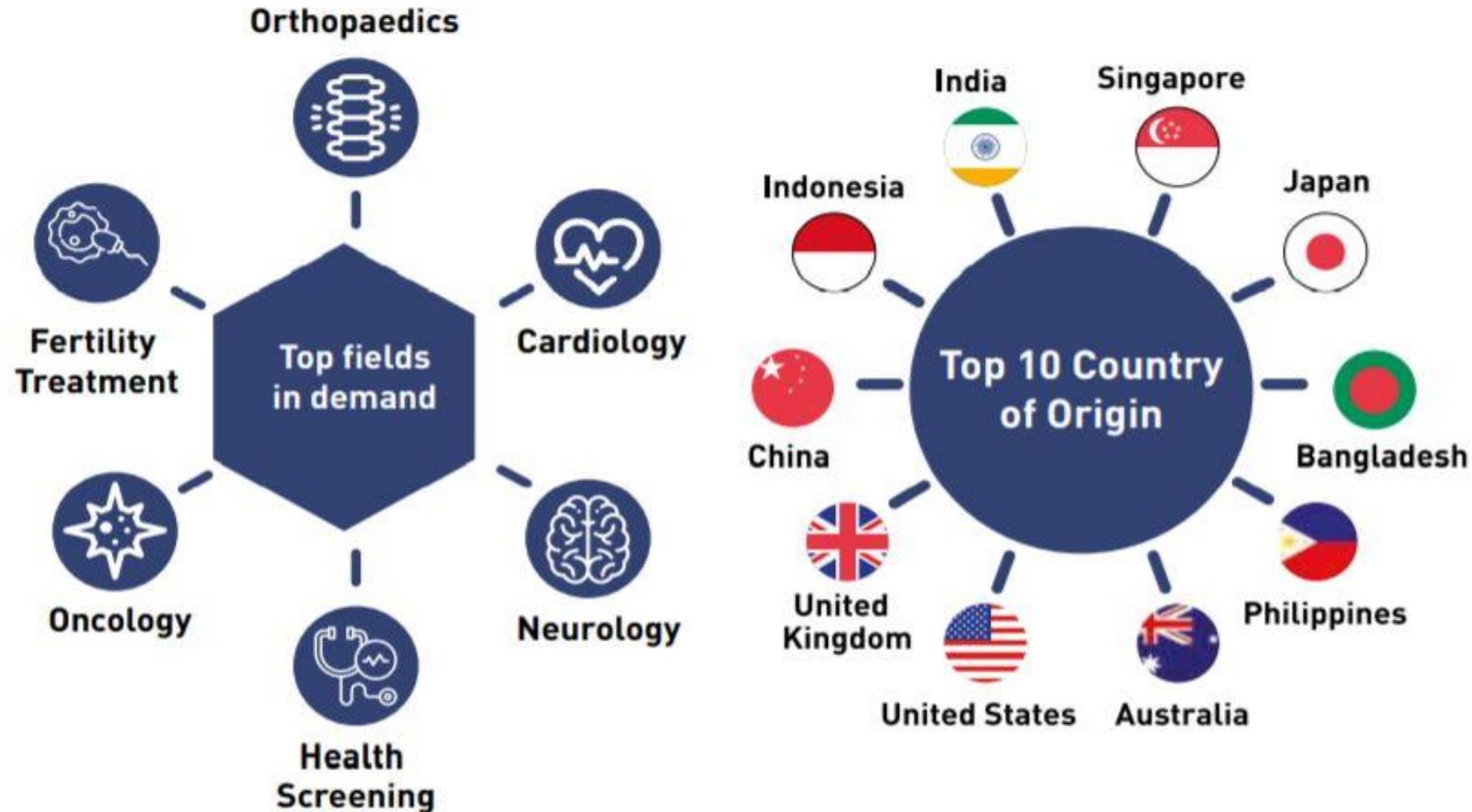
Malaysia Healthcare – Unique Selling Points



Malaysia Healthcare - Players



Malaysia Healthcare - Performance

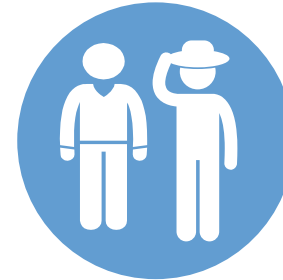


Definition of Healthcare Travellers



Healthcare Travellers (HT)

Combination of HTo + FP



Health Tourist (HTo)

Tourist purposely flying to Malaysia for treatment + Tourist seeking treatment during holiday



Foreign Patients (FP)

Expatriates + Foreign Workers + Foreign Students + MM2H Participants

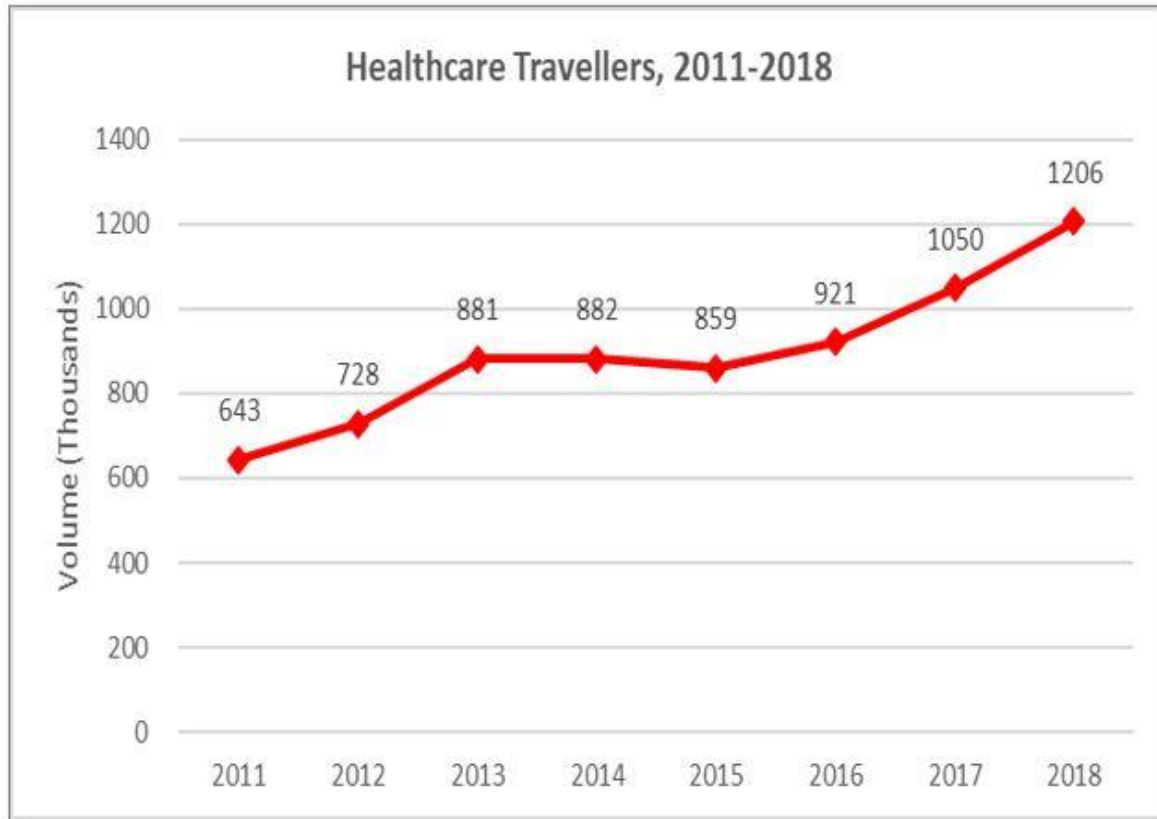
Scope:

Private healthcare facilities

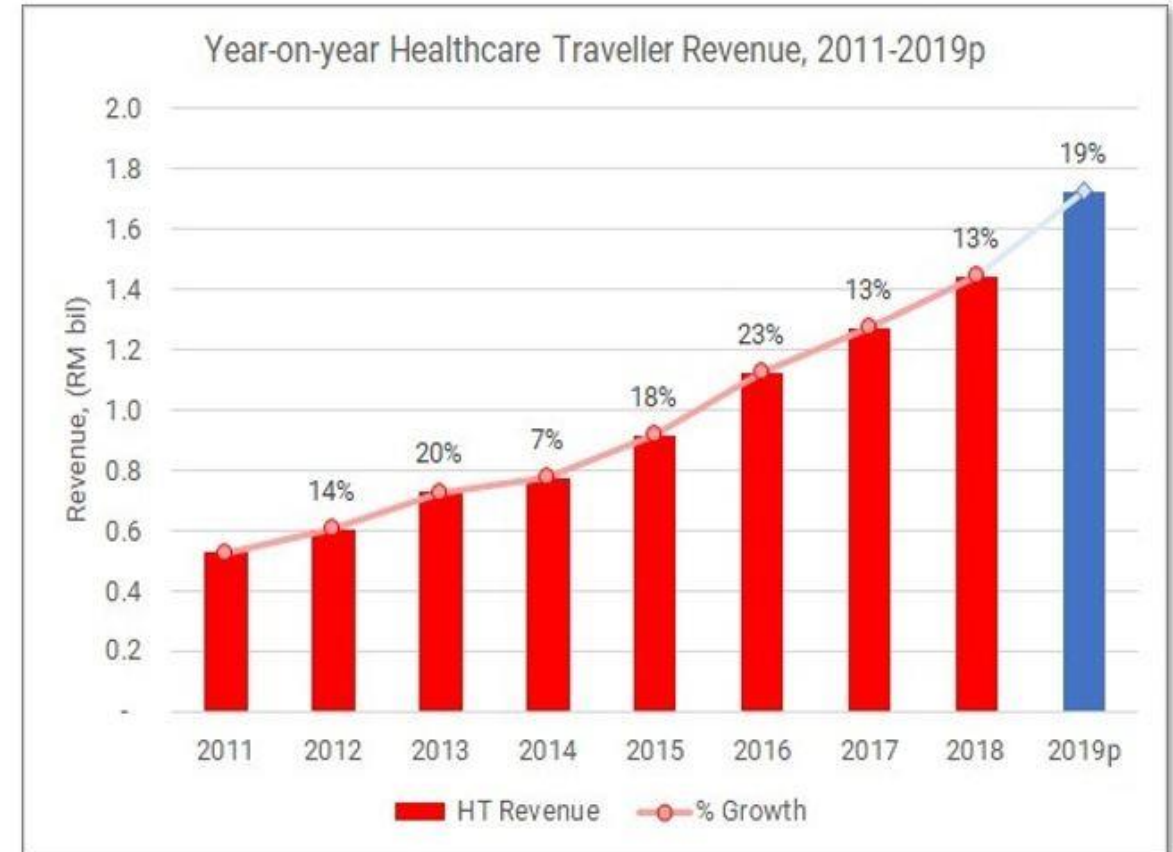
Measurement:

Healthcare Revenue earned from Healthcare Travellers in Private healthcare facilities

Malaysia Healthcare - Performance



Note : Ranking based on 2018 volume of healthcare travellers and health tourist
Healthcare Traveler = Health Tourist + Foreign Patient

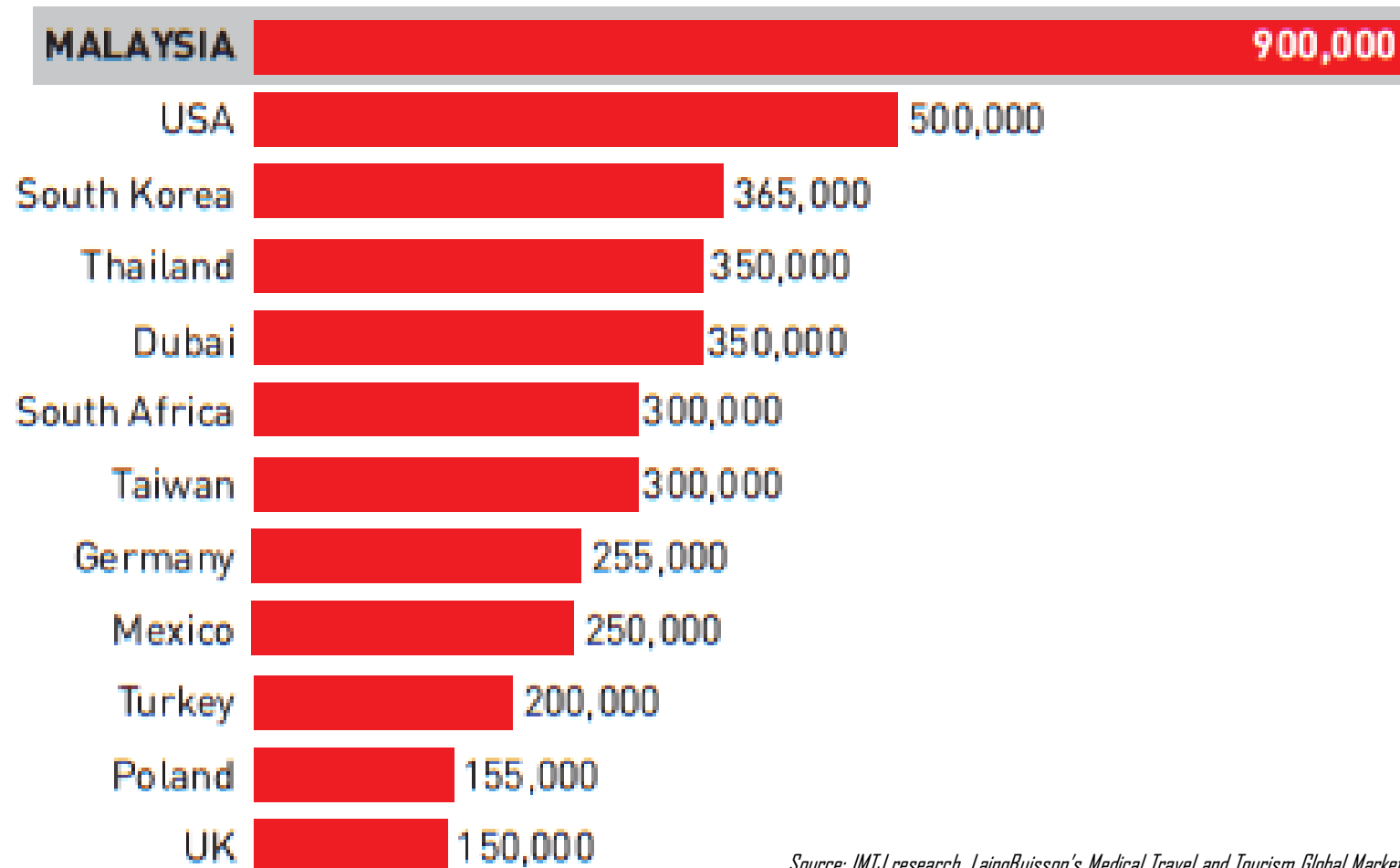


Note :

• 2019f data is the projected figure for 2019 for data as of March 2020

Source : Malaysia Healthcare Travel Council

Malaysia Ranked No.1 Among Top Medical Tourism Destinations 2018



Source: IMTJ research, LaingBuisson's Medical Travel and Tourism Global Market Report

Malaysia Healthcare - Performance



Global Recognitions:

- International Medical Travel Journal (IMTJ) Medical Travel Awards “**Destination of the Year**” **2015, 2016 2017 and 2020**
- IMTJ “Health and Medical Tourism Cluster of the Year” 2017-2020
- International Living’s Top Asian Country to Retire 2018
- International Living’s Annual Global Retirement Index “**Best Country for Healthcare**” **2015 – 2019**
- 2017 Asia Pacific Healthcare & Medical Tourism Awards
- 2015 - 2018 MasterCard-Crescentrating Global Muslim Travel Index - Top Country for Muslim Travel
- Global Health Consumer Choice Awards 2016
- Frost & Sullivan Asia Pacific Healthcare and Tourism Awards 2016
- World’s Best Hospitals for Medical Tourists by Medical Travel Quality Alliance (MTQUA)

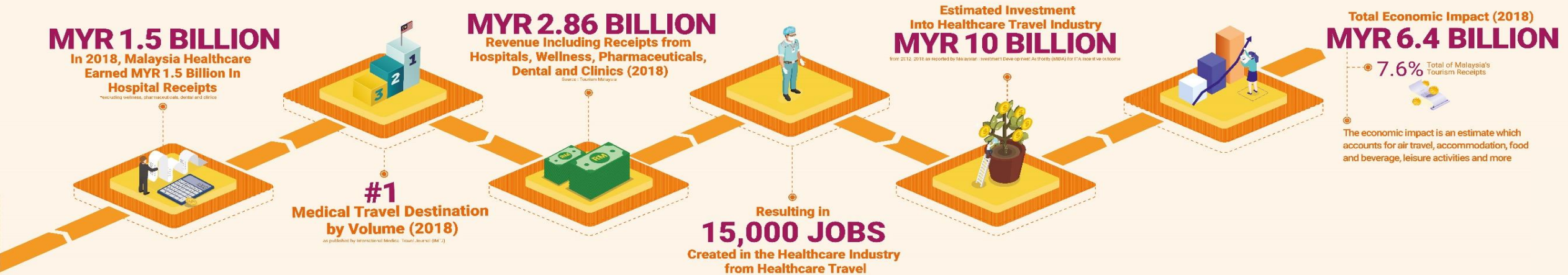


Malaysia Wins Esteemed 'Destination of the Year' Title Once Again



Malaysia Healthcare – Positive Impacts

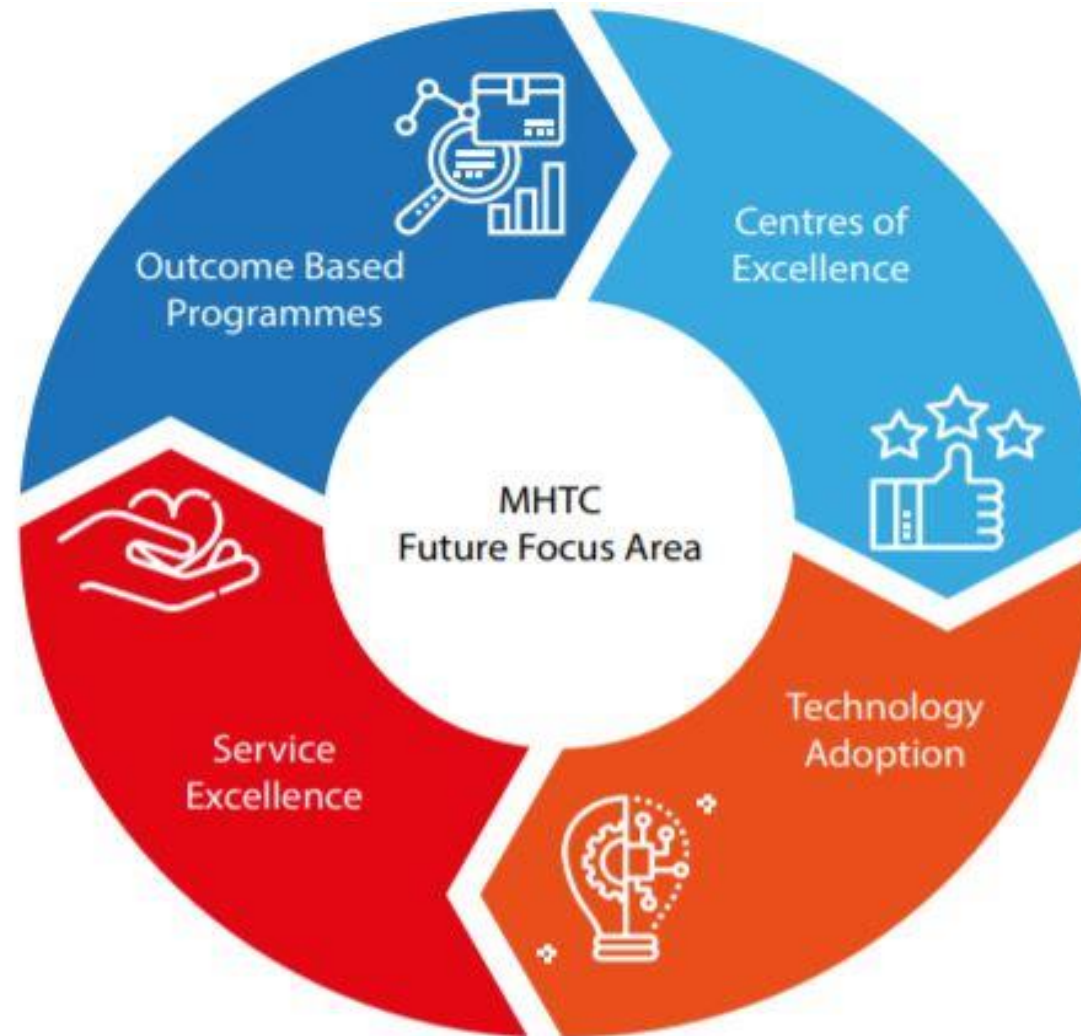
CELEBRATING 10 YEARS OF EXCELLENCE



Healthcare travel is a **key economic growth area** under:

- Economic Transformation Programme (ETP)
- 11th Malaysia Plan (RMK-11)
- National Export Council (NEC)

Malaysia Healthcare – Future Focus Areas



Healthcare Travel Industry – Gaps & Challenges

GAPS

i. Too reliant on traditional markets

i. Unfavourable in-patient to out-patient ratio

i. Lack of strong healthcare travel brand

i. Shortage in qualified medical personnel

i. Service capacity utilisation limits

i. Varied standards of service

i. Poor network and relationships in focus regions, resulting in little to no advocacy

i. Rapid evolvement of healthcare traveller demands which require fast, personal and effective response

CHALLENGES

i. Final mile conversion: Converting potential healthcare travellers into the country (low consumer brand equity)

i. Building momentum and maintaining consistent branding and visibility including brand differentiation due to budget cuts

i. Tug-of-war with competitors who have high investments in their respective healthcare travel industries

i. Healthcare travellers' evolving needs and wants

i. Fortification of focus markets' healthcare systems

i. Reduction of outbound traffic from source countries

i. Budgetary setbacks that led to financial constraints and delays in intended programmes and projects.

i. Weak currency impacts marketing and promotional capabilities

Towards a Better Tomorrow

(i) Offering a Holistic
Healthcare Travel Journey

(i) Embracing Digitalisation
of Healthcare and Data
Analytics

1. Government Relations –
Bilateral/Multilateral
Cooperation

 malaysiahealthcare.org  [malaysiahealthcare](https://malaysiahealthcare.org)  malaysiahealthcare.org

Learn More About Malaysia Healthcare!
<http://malaysiahealthcare.org/malaysia-healthcare-chronicles>