Malaysia HEALTHCARE
Quality care for your peace of mind

Malaysia
The World's Healthcare Marvel

Rebuilding Malaysia's Healthcare Travel Industry Towards A Sustainable Future

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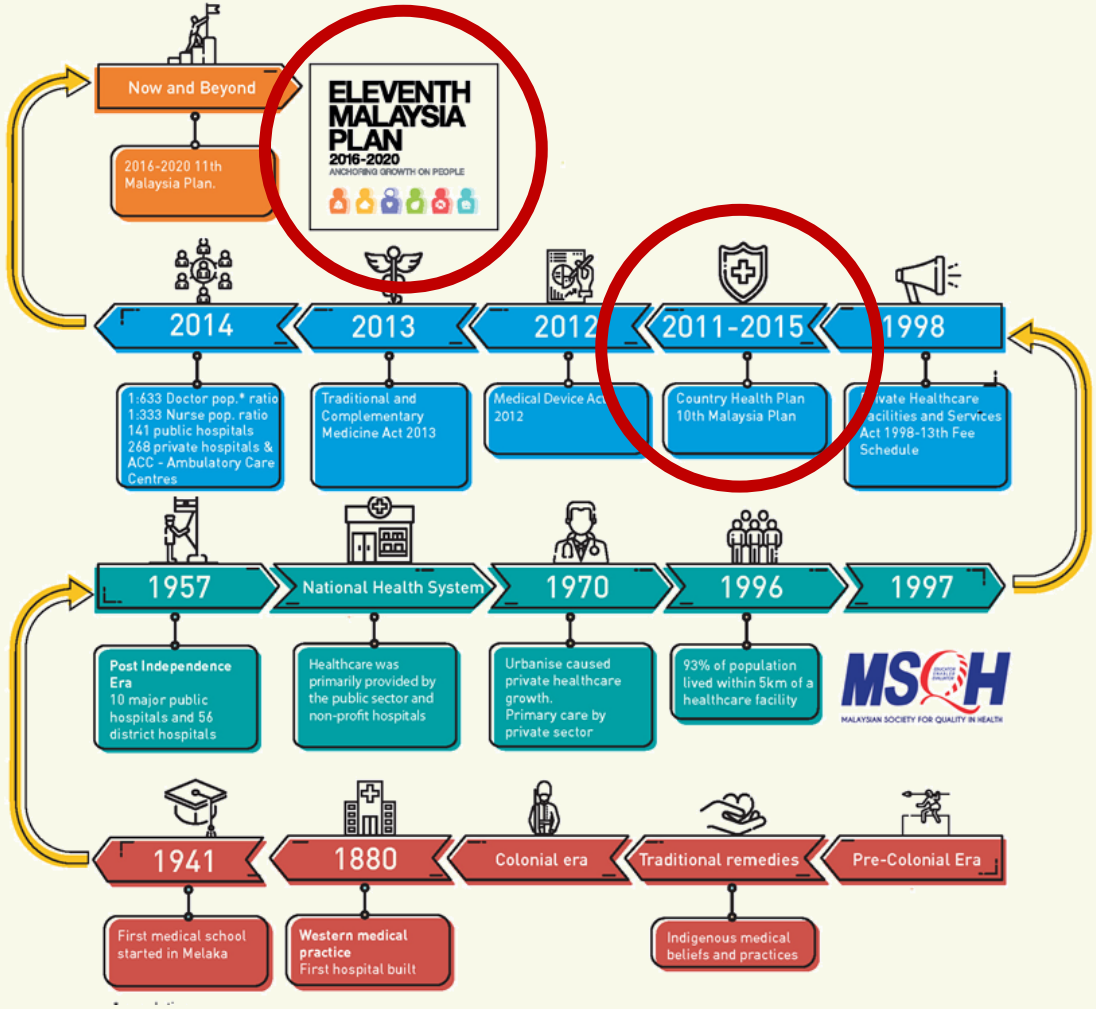
Healthcare as a National Agenda



- Malaysia's healthcare travel industry has been identified as a national agenda. Tenth Malaysia Plan (2011-2015): Identified as an area to transform services sector
- Eleventh Malaysia Plan (2016-2020): One of the primary drivers for economic growth
- Healthcare travel is identified as a **key economic growth area** in RMK-12
- Allied Market Research estimates that the **global healthcare travel market size** accounted for **$104.68 billion in 2019**, and is **projected** to reach **$273.72 billion by 2027**, registering a CAGR of 12.8% from 2019 to 2027.
- Globe Newswire gives a more modest estimate at around $144 billion by 2027.
- **What is certain**? **Healthcare travel** has been **identified as a hugely lucrative industry**, with many countries now vying to enter the global market and take a piece of the pie.

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About Malaysia Healthcare

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Promoting and Facilitating Malaysia Healthcare

Established in 2005 under MoH; corporatised in 2011

Promote Malaysia Healthcare internationally and grow the market share

CORE MARKETS
Indonesia
China
Myanmar
Vietnam

ASIA
Brunei
Bangladesh
Cambodia
Singapore

OCEANIA
Australia
N. Zealand

MENA
Qatar
UAE

MHTC Malaysia HEALTHCARE TRAVEL COUNCIL

Coordinate and facilitate development of the healthcare travel industry

Facilitate public - private partnerships for a more focused strategy

Strengthen the industry ecosystem

Malaysia HEALTHCARE Quality care for your peace of mind

In 2011, the brand “Malaysia Healthcare” was introduced, with the tagline “Quality Care for Your Peace of Mind”

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Malaysia Healthcare's Unique Selling Propositions

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World-Class Quality

- Well-regulated healthcare system
- Monitored by the Ministry of Health
- Accredited hospitals (Joint Commission International, Reproductive Technology Accreditation Committee (RTAC), ISQua and other agencies under ISQua)

Affordability

- Rates for healthcare treatments are regulated and capped by the Ministry of Health through the Medical Fee Schedule 13 of the Private Hospital Facilities and Services Act 1998
- Compared to the US, patients save 60 – 80% in treatments costs (Source: Patients Beyond Borders)

Ease of Accessibility

- Virtually little to zero waiting times for appointments, consultations and treatments with specialists
- Malaysia houses 200 private hospitals, not including dental clinics, health and wellness centres; 69 of these private hospitals are active players in healthcare travel

+

Tourist Haven

Global Halal Hub

Warm and Hospitable

Transportation Hub

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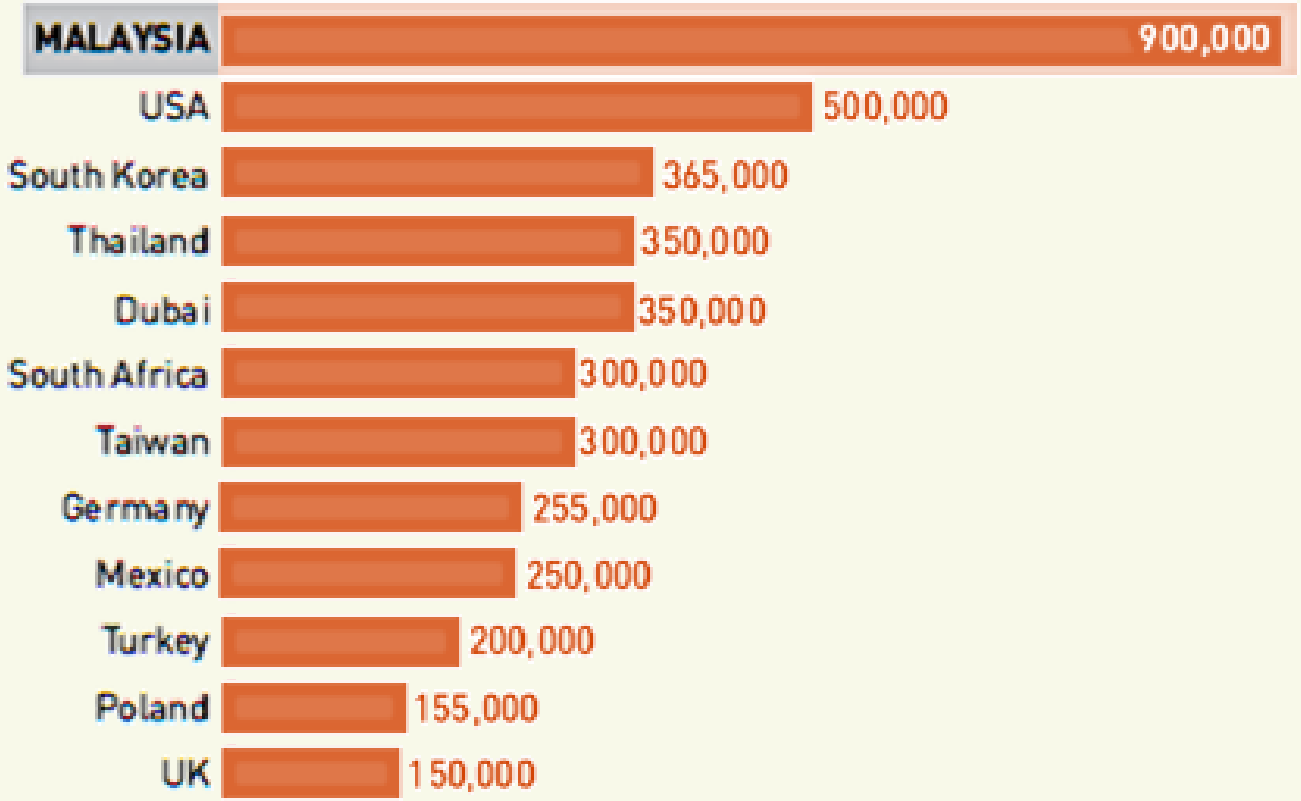
From Hidden Jewel to Healthcare Marvel

Malaysia

Ranked **No.1** Among Top Medical Tourism Destinations, 2018



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

IMTJ™

MEDICAL TRAVEL AWARDS

2017 – 2019, 2020
Destination of the Year - Malaysia

2017 – 2020
Cluster of the Year - MHTC

INTERNATIONAL LIVING® Since 1979

GLOBAL RETIREMENT INDEX

2015 – 2021
Top Country in the World for Healthcare - Malaysia

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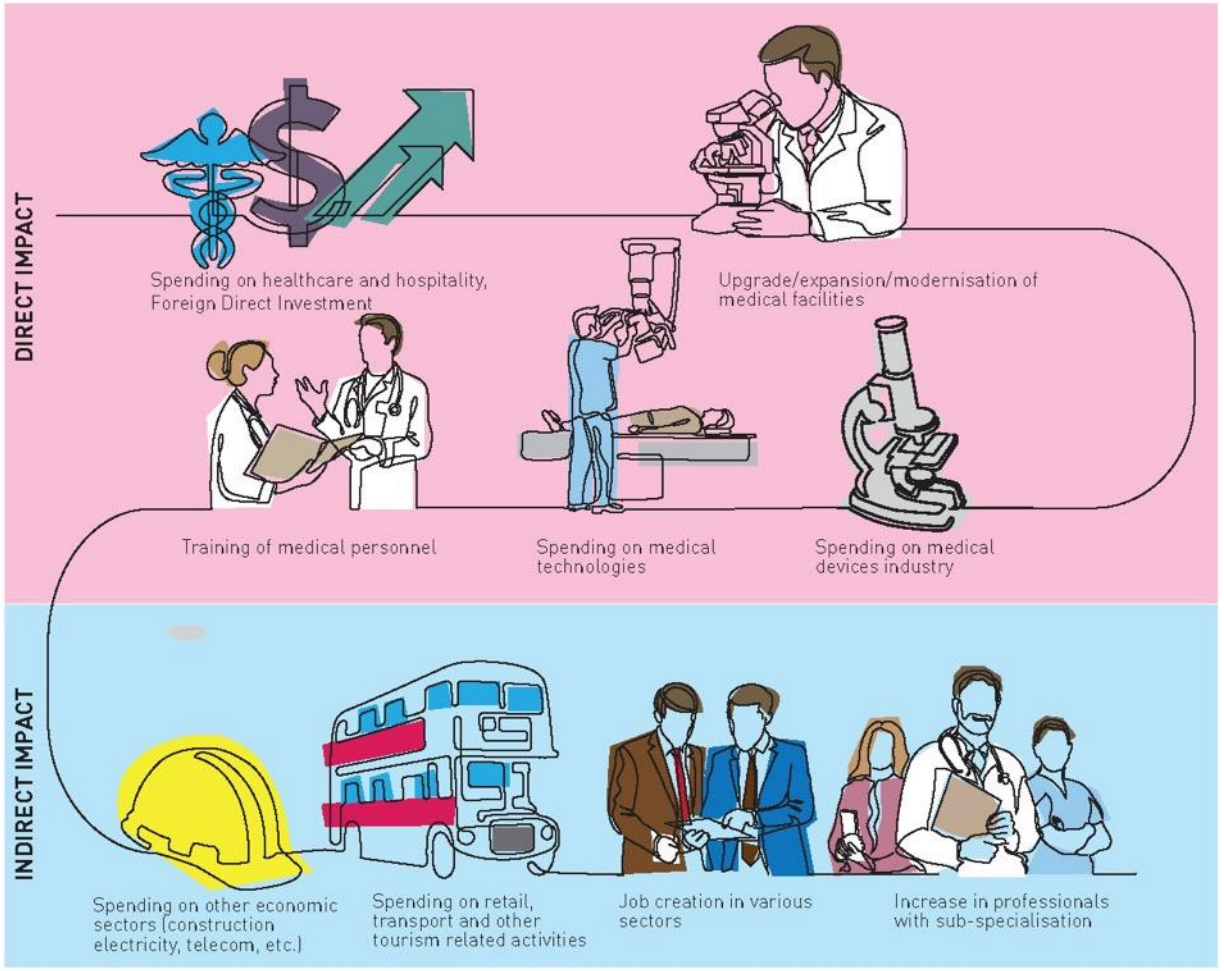
Economic Impact of Healthcare Travel Industry



Source: MHTC

- As a leading key export service industry, Malaysia Healthcare has created over 15,000 jobs and attracted over USD2.4billion in investments as of 2011. *(Source: MIDA)*
- Identified as a **Key Growth Area under SPV2030**, healthcare travel is a significant contributor for economic recovery *(Source: Shared Prosperity Vision 2030 Summary, 2019)*
- Target to achieve healthcare travel revenue of **RM2 billion** by 2025 with a total gross **economic impact of RM6-8 billion**
- The multiplier effect (RM1:RM4) accounts for spending on wellness, transport, accommodation, leisure and food

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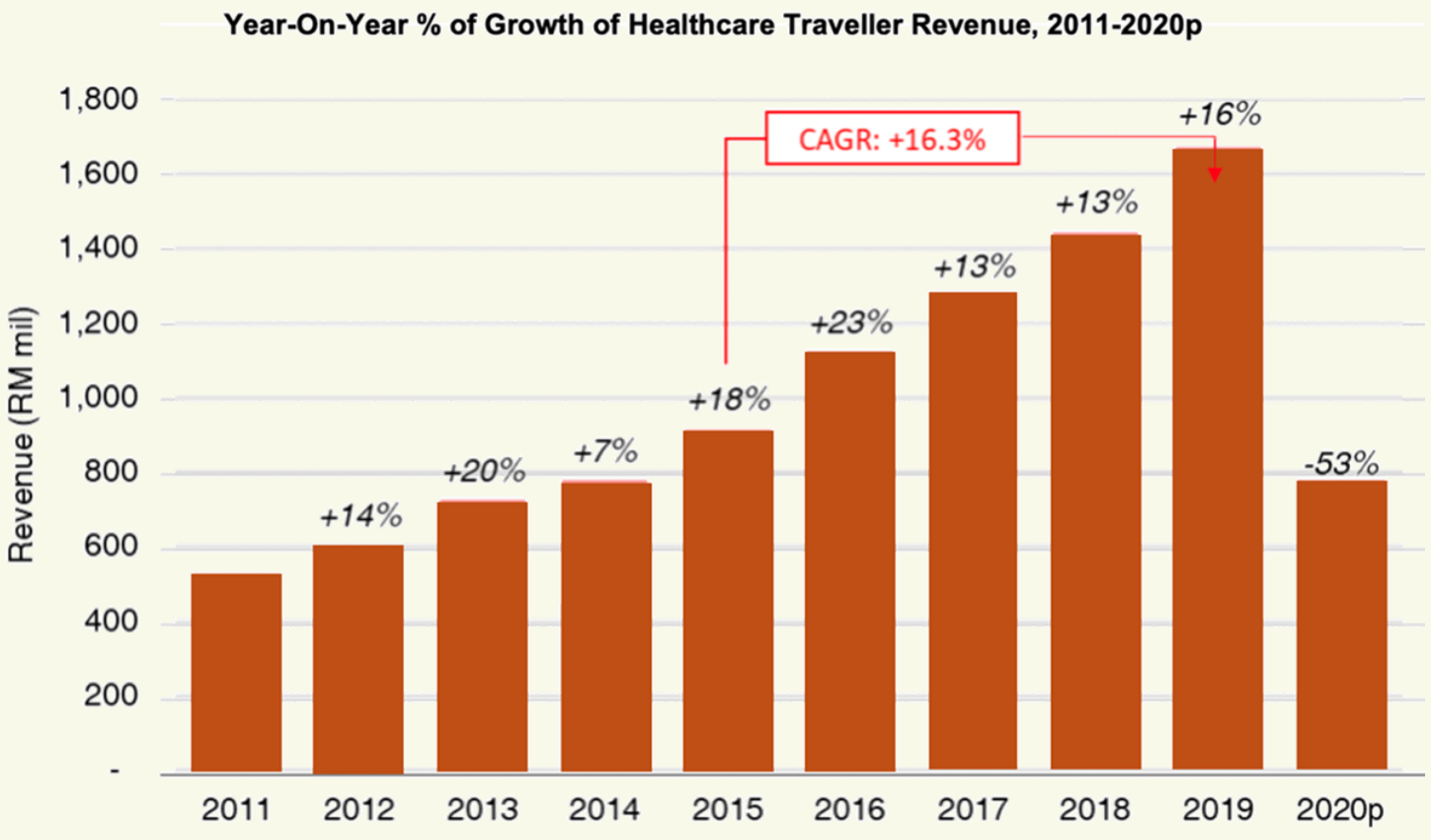
Malaysia Healthcare Travel Performance - Revenue



- Malaysia's healthcare travel industry saw a healthy growth in **2015-2019** with **CAGR of 17%** outpacing the regional growth
- Revenue generated from healthcare travellers in 2019 was **RM1.7 bil**
- Most sought after treatments:
  - Oncology
  - Cardiology
  - IVF – success rate above global average
  - Health Screening
  - Orthopaedics
  - Neurology

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Malaysia Healthcare:
Driving Sustainability, Fueling Growth

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Roadmap Towards Industry Sustainability

Recovery Phase (2021 – 2022)

Focus on:

- **Keeping our existing consumers interested**
- **Consolidating our stakeholders' strengths** along the value chain
- **Preserving and developing existing and new markets**
- Developing **digital framework** for **Malaysia Healthcare Travel** to enhance the patient journey experience through insertion of digital elements

Rebuild Phase (2023 – 2025)

- End goal is to have Malaysia known as a **safe and trusted destination for healthcare.**
- Enhance the **Malaysia Healthcare experience** through **efficient digital touchpoints**
- This is in line with our vision for Malaysia to be the **leading global healthcare destination**.

Growth (>2025)

- Malaysia as the preferred **destination for medical tourism**
- Diverse offerings – **beyond medical** such as wellness
- Preferred destination for **retirement**, **aged care**, **MM2H programme**

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Sustainability: Through Branding and Marketing

Rising Above COVID-19: Seek opportunities to **build stronger foundations** to enable better and **quicker recovery.**

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SHOWCASES

Healthcare best practices

Continuity of care through telehealth

Thought-leadership content

THROUGH

Aggressive PR and Branding campaigns	Supporting and enabling facilities	Amplifying expertise through social media

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Sustainability: Through Niche Positioning

CARDIOLOGY HUB OF ASIA

FERTILITY HUB OF ASIA

CANCER CENTER OF EXCELLENCE

FLAGSHIP MEDICAL TOURISM HOSPITAL PROGRAMME

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Sustainability: Through Continuity of Care

MHTC welcomes opening of borders for medical tourists

By New Straits Times - June 19, 2020 @ 5:26pm

+ 377

YB Dato' Sri Ismail Sabri Bin Yaakob
Senior Minister for Security and Minister of Defence

19 June 2020
Healthcare travel announced as first tourism sector to be opened

30 June
SOP for healthcare travellers approved by National Security Council

1 July 2020 - Now
Borders open for healthcare travellers (Subject to SOP)

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Sustainability: Through Partnerships

MHTC x Hangzhou Rende Maternity Hospital, China and International Medical Exchange & Cooperation Committee (IMECC), China

DoctorOnCall

Both partnerships will elevate the patient (**IVF patients in particular**) experience for Chinese healthcare travellers through:

- Continuous Medical Education (CME)
- Exchange of expertise/ medical advice (cardiology and oncology)
- Alternative source for patients to seek second opinions

Accelerated adoption of digital healthcare through:

- Sustained continuity of patient care
- Facilitation of patient-doctor communication
- Access to DoctorOnCall for MHTC Member Hospitals

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Sustainability: Through State Niche Offerings

Sarawak

Wellness to become one of the pull factors as a unique value proposition to grow the state for healthcare travel.

Penang

Infrastructure expansion (hospitals, medical devices, promotional institutions) to enhance accessibility for healthcare travellers.

Melaka

Focusing on developing Melaka's **first full-fledged health tourism centre**.

Source: Malaysia Healthcare Chronicles, 2019

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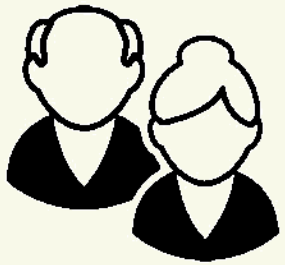
Sustainability: Through Aged Care



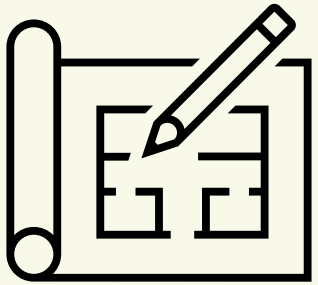
Aging Population

- The **number of older persons** is projected to double to **1.5 billion in 2050.** Globally the share of the population aged 65 years or over increased from 6% in 1990 to 9% in 2019. This is projected to rise further to 16% **by 2050, 1 in 6 people in the world will be aged 65 years or over**

Source: World Population Ageing Report, UN, 2019

- Malaysia's senior citizens (above the age of 60) is expected to increase to 11.1% in 2020, eventually reaching 15.3% by 2030 - **Making Malaysia a country with an 'aged population' by 2030**

Source: National Strategic Development Plan of Ageing Population, 2019



Aged Care Framework

- To analyse the supply and demand for aged care living and provide regulatory assessment of the aged care industry
- Develop aged care living as a key export service for Malaysia
- Framework to be established to develop new models of care for the aged care industry

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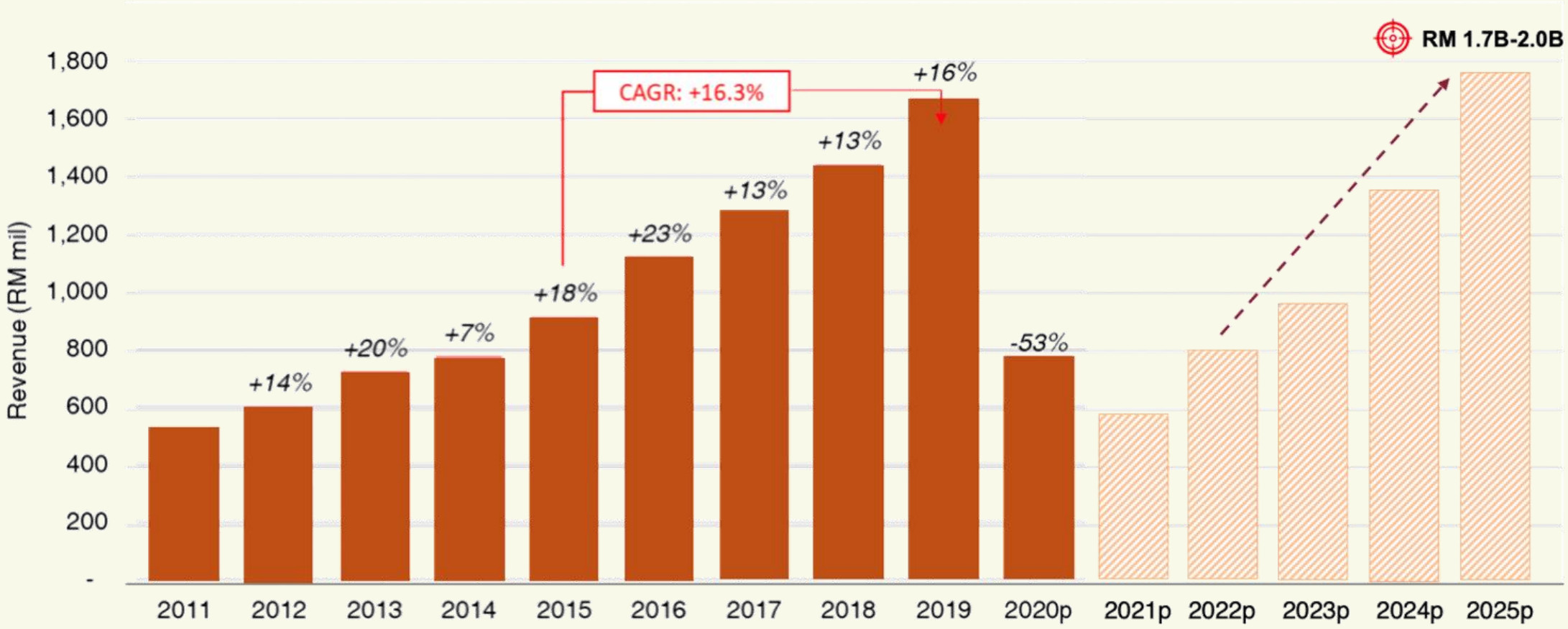
Malaysia Healthcare: Aspirations for the Future



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- Enhance patient's experience and journey
- Engage with business prospects in healthcare travel
- Discover how digital and technology can boost medical tourism
- Learn the do's and dont's from countries' case studies

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CEO & Co-Founder
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Zen Wellness Sanctuary Sdn Bhd, Malaysia

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