

Key Drivers of Medical Tourism in Malaysia

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Abstract

Globalization has transformed medical tourism into a booming revenue generating industry in many Southeast Asian (SEA) countries. One of the sub-sectors of tourism that contributed significantly towards their economic development was medical tourism. Medical tourism has attracted medical tourists from other parts of the world to the SEA region seeking medical attention and care. Among the SEA countries that are sought after for medical tourism in Malaysia. Medical tourism is rapidly expanding niche area and Malaysia has successfully claimed its position as one of the most preferred medical tourism destinations. The country has now emerged as the 3rd preferred medical tourism destination among SEA nations that offers competitive medical care and facilities. Thus, the objective of this paper is to examine the key drivers behind the impressive landscape of medical tourism development in Malaysia. This paper offers a discussion on the development of medical tourism in Malaysia based on the globalization theory that underpins this study. How globalization acts as a catalyst towards the development of medical tourism in Malaysia is also discussed in this paper.

Keywords:

Medical Tourism; Medical Tourists; Healthcare; Key Drivers; Globalization

1 Introduction

Globalization has compelled numerous countries to review their competitiveness in the context of business performance due to increased exposure to global market forces. Further, global competition has increased the potential for the emergence of newly transformed markets. One such example is medical tourism industry which is a fast-developing global niche market. Medical tourism could be defined as the process of traveling outside the country of residence to receive medical care.

In Asia, the leading medical tourism destinations are Malaysia, Thailand, Singapore, and India. Several studies have revealed that Malaysia is among the most attractive medical tourism destinations in Asia (Ayob & Masron, 2014). Malaysia's success as a leading medical tourism hub could be attributed to the significant competitive advantages it has in terms of excellent quality of health care services and a large number of internationally accredited hospitals (Mun et al., 2014). Moreover, the Malaysia Healthcare Travel Council (MHTC), an agency under the Ministry of Health, Malaysia has received numerous awards and global recognition from International Medical Travel Journals. Among the awards won by MHTC and Malaysian hospitals are 'Health & amp, Medical Tourism: 'Destination of the Year', International Hospital of the Year, 'International Cosmetic Surgery Clinic of the Year, 'International Dental Clinic of the Year', 'International Fertility of the Year', and 'Best Marketing Initiative of the Year' (Malaysia Healthcare Travel Council, 2017).

Malaysia's medical tourism industry was able to achieve a remarkable milestone when the International Medical Travel Journal awarded Malaysia the Health & Medical Tourism Destination of the Year for three consecutive years (from 2015-2017), further cementing the country's reputation as the top medical tourism destination in the world (Bernama, 2017). Malaysia was also recently named as one of the four countries with the best healthcare in the world by International Living's Global Retirement Index (2017), which is compiled annually to rank and rate the best retirement havens in the world today.

Growth in the popularity of medical tourism in Malaysia has captured the attention of policy-makers, researchers as well as the media. This accounts for the objective of this paper, that is, to examine the key drivers behind the impressive landscape of medical tourism development in Malaysia. This paper adopts globalization as a theoretical framework in analysing its role towards the development of medical tourism in Malaysia. How globalization acts as a catalyst towards the development of medical tourism in Malaysia is discussed in this paper. This paper also deliberates on the development of medical tourism in Malaysia.

2 Literature Review

2.1 Globalization and Medical Tourism

Globalization has facilitated the increase in tourism through connectivity. Globalization provides easy access to travel due to benefits derived from economies of scale and wide dissemination of information on tourism. While tourism has long been recognized as a source of economic growth, embracing globalization has also geared up an exponential growth in the country's tourism industry. According to Review of the National Tourism Policy [Executive Summary-Main Report], Ministry of Tourism Malaysia (2004: 4), the key impacts of globalization on the tourism sector are:

- i. Creation of jobs and increase in investments and increased mobility as people travel for work and leisure;
- ii. Leakage in foreign exchange earnings due to greater foreign ownership of local businesses resulting in higher franchise, licensing, distribution and management fees;
- iii. Move towards knowledge-based economy whereby emphasis is given to integration and innovation;
- iv. Breakdown in cultural borders facilitated by communication and transportation and emergence of global culture;
- v. Creation of transnational corporations (TNC) to cater for certain niche areas and reach out to the global markets;
- vi. Businesses operate on global strategies and global market presence, such as travel agency network and financial services;
- vii. Electronic online distribution and trade;
- viii. Use of technology to distribute information;
- ix. Stimulates the economy and raises standard of living but potentially creates social inequality; and
- x. Structural changes in airline industry such as lower domestic and international fares, the existence of charter companies which increase accessibility to tourist destinations and general discounts on scheduled airlines.

Globalization in the context of international relations is a massive concept as it encompasses several aspects that influence the development of a society. The globalization of culture is one aspect where the forces of globalization strongly impact society both nationally and internationally (Cuterela, 2012). The phenomenon of globalization of culture engulfs several facets of the global tourism market, for example, cultural tourism and sports tourism. Another feature of the emerging global tourism market is medical tourism, which was initially perceived as a patient travels from a less developed country to a medically advanced nation for obtaining better health treatment. However, such trend has seen a reversal change as there is growing number of patients from developed countries chose to travel to developing countries for a medical purpose (Pillay, 2017).

Connell (2006) defined medical tourism as an activity which people travel to other countries to obtain healthcare services and facilities such as medical, dental, and surgical care while having the opportunity to visit the tourist spots of that country. Alternatively, Bookman and Bookman (2007) defined medical tourism as travel for purposes of obtaining health treatment, and as an economic activity that entails trade in services and represents two sectors namely tourism and medicine.

Medical tourism in the modern context is continuously developing and has become a unique and independent industry outside the traditional confine of the tourism industry. This development is a direct response to the evolving healthcare technologies and patients' constant desire to seek for the best health treatment in a finite health resources environment. Many countries have strived to enhance their medical tourism industry's capacity by leveraging on the benefits of globalization such as encouraging cross-border direct investments (hospital merger and acquisition), rapid adoption of the latest healthcare technologies and medicines, pursuing international accreditations for qualified hospitals and implementing latest medical tourism standards and practice. Suffice to say, the rising growth trend of the tourism industry is to be in tandem with the onset of globalization, where the increase of personal economic wealth offers necessary resources to a potential patient to seek medical treatments abroad, which indirectly contributed to the economic growth of the destination country's healthcare infrastructure.

Consistent with the ongoing globalization trend, the flexibility of tourism industry allows the industry to create more suitable attractions or products which are engineered to suit the more discerning high-end market (Ministry of Tourism Malaysia, 2004). Furthermore, globalization has an immediate effect on the supply and demand of tourism industry in several ways, where the supply component of tourism services are affected by international suppliers, computerized information and reservation systems, decreasing costs of air travel and access to destination with relatively low price and income levels, emerging new destinations, whereas the demand of tourism services are affected by factors including the emergence of tourists with increased wealth who are more experienced and knowledgeable (Smeral, 1998). Similarly, medical tourism stakeholders may consider applying the same framework in identifying the key factors affecting the demand and supply of medical tourism services.

Alternatively, some industry observers have highlighted the possibility to promote medical tourism as a global business model by adhering to the basic marketing principles adopted by multinational and corporate business enterprises such as design and market strategies, pricing, branding, and management to maintain the quality of services (Bookman & Bookman, 2007). This is evident when some of the medical tourism destination countries were aggressively branding their services by boasting selling points such as low cost of treatment, short waiting-time, and western health care systems specifically to attract patients from western countries.

The impact of telecommunication on the medical tourism could not be understated, where the presence of a unified information sharing platform in the form of the social

network was able to encourage individual patients to share information about their healthcare travel journey and experience (Mansbach & Taylor, 2012). Unsurprisingly, many medical tourism industry stakeholders such as hospitals and promoting agencies have also utilized social networks to channel market information to the intended target audience in an easier, faster and cheaper manner.

3 Overview of Malaysia's Medical Tourism

The Malaysian healthcare system is divided into two sectors namely the public and the private healthcare sectors. The private healthcare sector, which contributes 30% of healthcare services nationally, mainly provides medicinal and rehabilitative services and is financed strictly on a fee-for-service basis. Meanwhile, 70% of the nation's healthcare services are provided by the public sector. It is heavily subsidized by the government and used by the majority of the Malaysian population (Aniza et al., 2009).

Malaysia began aggressively promoting medical tourism in the aftermath of 1997 financial crisis which has resulted in a sharp fall in revenue for many private hospitals in Malaysia. These hospitals had to attract foreign patients to complement the drastic shortfall of local patients while trying to diversify its healthcare and tourism sectors (Moghavvemi et al., 2016). By January 1998, the Government of Malaysia established the National Committee for the Promotion of Medical and Health Tourism with the goal to institute necessary policy support in order to grow the industry, there the committee was tasked to identify suitable target countries for promoting health tourism, propose suitable tax incentives; fee packaging as well as outlining accreditation and advertising guidelines (Chee, 2007). Since then, both public and private sectors have collaborated closely to actively promote Malaysia as medical tourism destinations to boost and diversify its medical tourism industry (Connell, 2006).

Accordingly, the private sector welcomed the government's initiative, and the number of private healthcare facilities that registered for the promotion of medical tourism has significantly increased from 35 hospitals in 2010 to 76 hospitals in 2017 (MHTC, 2017). These facilities currently offer a wide range of medical services which are highly sought after by medical tourists including cardiology, orthopedics, oncology, neurology, dental treatment, infertility treatment, cosmetic surgery and rehabilitation services (Pillay, 2017).

To date, Malaysia reportedly has received more than one million healthcare tourists who were estimated to have contributed more than RM1 billion in hospital revenue in 2016. According to Herberholz and Supakankunti (2013), this remarkable achievement was attributed by several key factors including well-trained medical experts, the availability of state-of-the-art medical technology, more affordable international transport costs and medical treatment, the rise of the internet, the emergence of new companies and agents which serve as intermediaries between international patients and hospital networks, as well as governmental support. This finding was echoed by earlier studies which identified that, among the factors that contribute to medical

tourism industry are namely cost competitiveness (Leng, 2010), ease of communication due to the presence of multi-lingual health workforce (Hin et. al, 2013), strong government initiatives (Leong, 2014), service quality (Sunday Mail, 2017), tourism attraction (Khan & Alam, 2014) and essential infrastructure support (Wong, 2016).

Table 1 indicates that the number of medical tourists travel to Malaysia for healthcare treatment has increased from 2011 until 2016, which revealed that the industry has been experiencing a consistent growth which offers an opportunity for active participation by entrepreneurs in this field:

Table 1: Medical tourist arrivals to Malaysia

Year	Total Healthcare Travelers	Revenue (RM)
2011	643,000	RM537 million
2012	728,000	RM603 million
2013	881,000	RM727 million
2014	882,000	RM777 million
2015	859,000	RM914 million
2016	More than 1,000,000	More than RM1 billion

Source: Pillay (2017)

Amidst of this exciting development, the Government of Malaysia continues to develop key strategies to propel further the industry’s growth, one of which includes diversifying the source of medical tourists by exploring secondary markets including Bangladesh, Australia, United Kingdom and the Middle East. To remain competitive, industry observer has suggested for Malaysian hospitals to consider emulating top medical tourism hospitals by publicizing the outcome of their services as mean to benchmark and publicize their medical competency.

4 Findings

4.1 Key drivers of Malaysia’s medical tourism

This paper has identified several key agencies and industry players involved in the development of the medical tourism industry in Malaysia:

4.1.1 Government agencies

One of the key agencies that extensively promote Malaysia's medical tourism is the Malaysia Health Travel (MHTC), an agency established under the Ministry of Health in 2009 specifically to raise Malaysia’s profile as the preferred healthcare services destination in the world. The council also serves as a one-stop centre to facilitate the overall development of medical tourism by coordinating industry collaborations and

enhancing public-private partnerships. Among the notable strategies initiated by MHTC includes:

- i. Setup a dedicated call center and website to cater any inquiries from potential medical tourists about hospital services, treatment packages, hotel stay and prior travelling to Malaysia.
- ii. Established government-to-government agreements with Oman, Libya, and Kazakhstan which allows these countries to pay for their citizen's healthcare services in Malaysia (Maierbrugger, 2015).
- iii. Established overseas representative offices in Indonesia, Myanmar, Vietnam, China, and India with the aim to gain faster access to the target markets by handling inquiries and rendering healthcare travel assistance to potential medical tourists.

As part of the effort to diversify the source of medical tourists, MHTC collaborated with Gulf Cooperation Council (GCC) countries to provide “halal health treatments” by emphasizing hospitals in Malaysia are Muslim friendly (halal food, prayer rooms, halal medical treatments where insulin made from bovine products rather than porcine based, (Leong, 2014).

The second government agency is Ministry of Tourism and Culture Malaysia (MOTAC). The introduction of My Second Home (MM2H) program, which was spearheaded by MOTAC, allows foreigners who fulfill specific criteria to stay in Malaysia for ten years on a multiple-entry social visit pass. Naturally, the MM2H participants are eligible to enjoy the local medical treatment while staying in Malaysia and thus indirectly contributed to the medical tourism industry growth. In addition, MOTAC was able to leverage on its industry presence to further develop the country’s tourism industry, as observed in its partnerships with other countries through the Golden Phoenix Award, a platform for women from across the globe to meet, gather information, share expertise, seek opportunities, and explore new markets in all fields of endeavour including medical tourism (Ministry of Tourism and Culture Malaysia, 2015).

Another government agency is the Tourism Malaysia and Malaysia External Trade Development Association (MATRADE). MATRADE is a government agency established under the Ministry of International Trade & Industry Malaysia (MITI) to promote Malaysia’s services and products abroad. Before the establishment of MHTC, the medical tourism marketing promotion abroad was organized and carried out by Tourism Malaysia and MATRADE. Tourism Malaysia is a marketing arm agency established under the Ministry of Tourism and Culture Malaysia or MOTAC to promote Malaysia as a top-of-the-mind destination, in line with its popular tagline "Malaysia, Truly Asia." These two agencies were able to work hand-in-hand by establishing a well-coordinated mechanism in promoting the medical tourism which can accommodate different marketing platforms including international tourism fair, medical conference, trade mission, and medical talks, etc.

4.1.2 Private Hospitals

The private sectors have played an equally significant role in developing the medical tourism industry. Many private hospitals in Malaysia have progressively implemented several strategies to attract more foreign patients by improving existing infrastructure and equipment, pursuing international accreditation, improving their website for multi-lingual information dissemination, transparently offering cost package as well as enhancing patients' experience through end-to-end service delivery. The following examples illustrated the various efforts and achievements undertaken by Malaysian private hospitals:

KPJ Healthcare

As the largest private medical services provider in Malaysia, KPJ has been aggressively promoting its services abroad by offering a comprehensive range of services for prevention, detection, and treatment for diseases. These services are backed by highly trained teams of medical consultants, nurses and allied staff supported by modern equipment and facilities. Among the well-known KPJ Healthcare throughout Malaysia are KPJ Damansara Specialist Hospital, KPJ Ampang Puteri Specialist Hospital, and KPJ Penang Specialist Hospital (KPJ Healthcare Berhad, 2017). Some of the major services that are offered by KPJ Healthcare are Cardiac Services, Oncology, Chemotherapy and Radiotherapy services and Surgical as well as Critical Care (KPJ Healthcare Berhad, 2017). Similar to most private hospitals in Malaysia, KPJ hospitals have obtained internationally recognized quality and standards such as MS ISO9002 or accreditation by the Malaysian Medical Society for Quality of Health (MSQH). The lack of regulation for online medical tourism should be concerned to all, given the scarce information about medical tourism exists online (Lunt et al., 2011). Thus, KPJ Hospitals have utilized the interactive website to provide content regarding their medical facilities, equipment, and staff. Furthermore, they use varieties of techniques to instill confidence in their potential patients such as linking their hospital's website to accreditation bodies and providing prompt information concerning quotation cost.

Gleneagles Hospital

Gleneagles Penang Hospital and Gleneagles Kuala Lumpur are among the well-sought hospitals by international patients. The hospitals boast an impressive line-up of many centres of excellence including cardiology, orthopedics, women and children health, oncology and ophthalmology, which provide outstanding service quality combined up to date technologies such as a 640-slice CT scanner (Gleneagles Penang, 2017). The hospitals also provide a one-stop solution centre for medical tourists to engage from pre-operative consultations to post-operative rehabilitative treatments and therapies (The Strait Times, 2015).

Prince Court Medical Centre

Winner of the best medical tourism hospital as accorded by the Medical Travel Quality Alliance in 2014 and 2015 (Downes, 2015), this 277-bed hospital is strategically located in the city centre of Kuala Lumpur with a façade easily mistaken as an upscale hotel (BorneoPost, 2017). The hospital was established by Petronas, Malaysia's national oil and Gas Company in 2007 to treat the injuries of its workers. Over the years, more overseas patients come for medical treatment as the hospital is now famous for its plastic reconstructive services. The majority of patients have sought medical treatment including orthopedics and cardiology as well as dental treatment (Downes, 2015).

Island Hospital

Island Hospital is also a well-sought destination for medical treatment by overseas patients. Island Hospital was established in Penang in 1996 equipped with the 300-bed hospital (Island Hospital Sdn Bhd, 2017). The hospital currently employs more than 50 full-time specialists and able to offer numerous treatment that is supported by advanced medical technologies including the 3 Tesla MRI (Island Hospital Sdn Bhd, 2017). Frost & Sullivan has recognized Island Hospital as the 2017 Malaysia Medical Tourism Hospital of the Year (PR Newswire, 2017). Despite a challenging global economic climate, Island Hospital successfully grows the medical tourism industry through its continuous expansion activities and holistic customer service experiences.

Media

Aside from the role of government agencies and hospitals, mass media has played a crucial role in popularizing medical tourism and consequentially generate more awareness for the society. According to Zappei (2015), Malaysia has been promoting medical tourism heavily through the campaigns up to 80% compared to the developed nations. The continued presence of news cycle reporting Malaysia's medical achievement combined with individual hospitals' media campaign was effective in enforcing the strong message of the country's medical tourism appeal to both existing and new patients.

5 Conclusion

The ongoing phenomenon of globalization has greatly impacted the global medical tourism industry growth, where Malaysia has successfully established itself as one of the major medical tourism destinations in the Southeast Asia region. The prospects of the country's medical tourism industry remain optimistic where strong government initiatives, effective public-private partnerships, aggressive hospitals' marketing efforts and continuous media exposure have successfully propelled the medical tourism industry in Malaysia to a greater height. As such, all relevant key stakeholders should

vigilantly monitor the progress of the globalization trend as to ensure Malaysia's medical tourism industry continues to grow.

6 About the authors

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