

INDUSTRIAL INSIGHTS REPORT

Issue: 01/2021

HEALTHCARE INDUSTRY:

- PRIVATE HOSPITAL
- HEALTH SUPPORT SERVICES
- VETERINARY SERVICES

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What's Inside?

HRD Corp Industrial Insights Report is developed to share the latest training-related updates and insights for various industries in Malaysia. This report serves as a reference for all stakeholders on current issues and the work involved in improving the nation's human capital development. It comprises highlights on the general industry outlook, training trends under HRD Corp and employers' qualitative feedback. The report comprehensively covers the importance of the industry, training overview, industry demographics, -related skill areas and academic qualifications for the current workforce, training challenges and their impact.

Instead of taking the traditional social science research approach, this report adopted an action research approach inspired by Kurt Lewin's process. This is geared at driving improvements within HRD Corp in order to better meet the changing needs of registered employers.

Nevertheless, it should be noted that since the content of this report is confined to the context of the selected HRD Corp sub-sectors and our registered employers, there is a limitation on how the contents can be applied to the wider industry.

Note: The Expansion of the PSMB Act 2001 coverage enacted in March 2021, now includes all industries but the data was unavailable at time of writing.





CHAPTER 1:

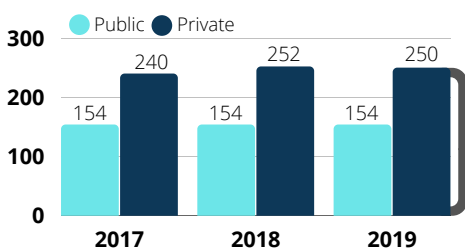
PRIVATE HOSPITAL

PRIVATE HOSPITAL

Definition: The provision of treatment or wards to patients in any premises other than a Government hospital or institution and includes any private maternity home but does not include private nursing home within the meaning of the Private Healthcare Facilities and Services Act 1998 [Act 586]. (PSMB Act 2001)

INDUSTRY OUTLOOK

Number of Public and Private Hospitals in Malaysia by Year



Source: Statista 2017-2019

HRD Corp Registered Employers in 2019



Source: HRD Corp Internal Database

The importance of healthcare can never be overstated, especially during the pandemic. Private and Government Hospitals in Malaysia has been working hand-in-hand to overcome this massive challenge. From 2017 to 2019, the number of Private Hospitals increased from 240 to 250. The increase in the number of Private Hospitals is attributed to the demand from patients as many are unable to obtain subsidised healthcare due to overcrowding in Government Hospitals. This is because Malaysia has some of the lowest medical fees in the world (some 40 percent lower than the US and UK) with the government subsidising up to 98 percent of public healthcare costs. Patients at Private Hospitals are treated fast, but it is often more expensive. The discrepancies in cost varies vastly according to the type of treatment received (RinggitPlus, 2018).

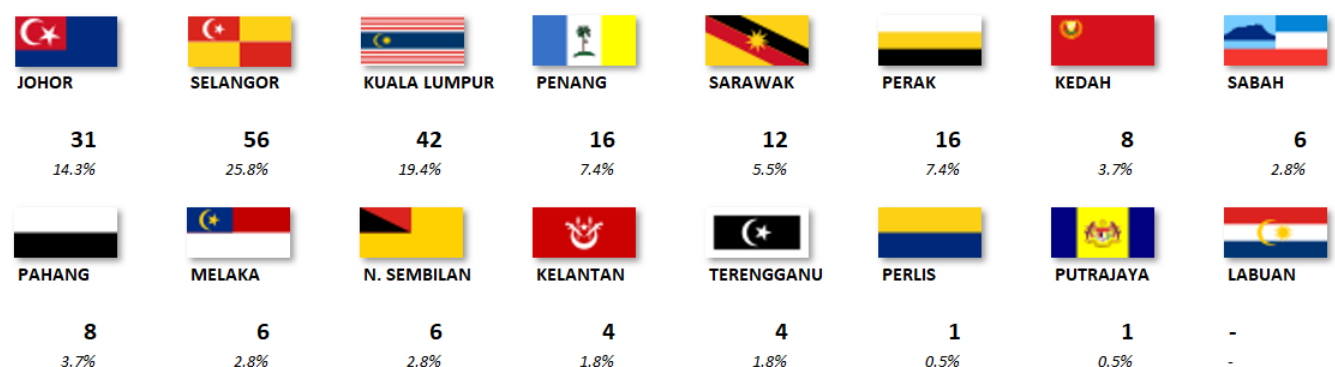
Overall, the local healthcare sector is expected to grow to RM127 billion (US\$30 billion) by 2027, fueled by increasing demand for healthcare services from an ageing population, rising affluence, and increasing life expectancy (Asean Briefing, 2020).

PRIVATE HOSPITALS REGISTERED UNDER HRD CORP

Source: HRD Corp Data as of December 2020



NUMBER OF HRD CORP REGISTERED EMPLOYERS ACCORDING TO STATES IN 2020

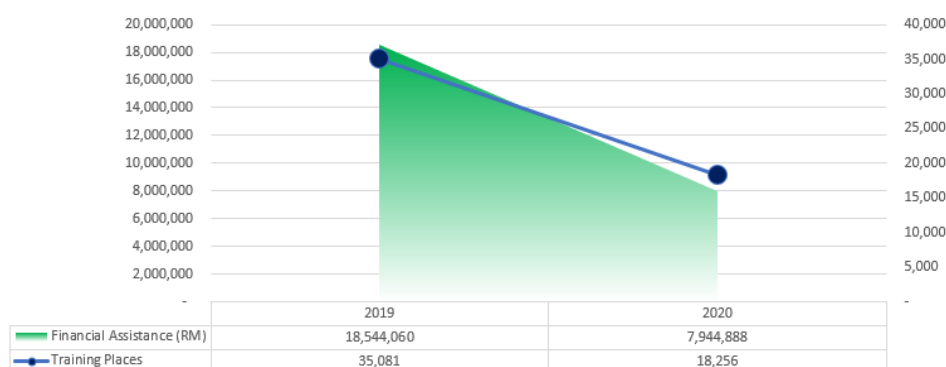


It is interesting to observe that Penang and Perak have the same number of Private Hospital employers registered with HRD Corp, although Penang is a comparatively richer state based on per capita GDP.

Source: The RinggitPlus Team. (2018) "Government and Private Hospitals in Malaysia: How Much Do They Really Cost?" <<https://ringgitplus.com/en/blog/insurance/government-and-private-hospitals-in-malaysia-how-much-do-they-really-cost.html>>

Medina, A. (2020) "Malaysia's Healthcare Sector: A Rising Giant in ASEAN" <<https://www.aseanbriefing.com/news/malysias-healthcare-sector-a-rising-giant-in-asean/>>

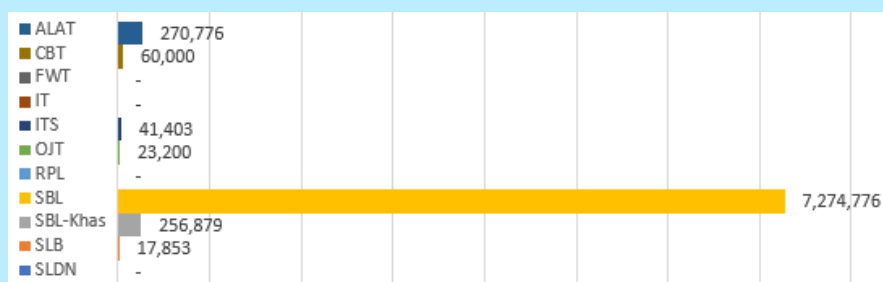
TRAINING OVERVIEW



Private hospitals registered 18,256 training places in 2020, and most training took place in the beginning and end of 2020 when they were not impacted by the various Movement Control Orders implemented by the government. Private Hospitals invested close to RM8 million in employees training in 2020.

HRD CORP LEVY SCHEMES

Financial Assistance Approved (RM) according to HRD Corp Schemes in 2020



LEGEND

ALAT: Purchase of Training Equipment & Setting Up Training Room Scheme
CBT: Computer Based Training
FWT: Future Workers Training
IT: Information Technology & Computer Aided Training
ITS: Industrial Training Scheme
OJT: On-the-Job Training
RPEL: Recognition of Prior Experiential Learning
SBL: Skim Bantuan Latihan
SBL-Khas: Skim Bantuan Latihan Khas
SLB: Skim Latihan Bersama
SLDN: Skim Latihan Dual Nasional

The breakdown of Financial Assistance revealed that SBL is the most popular scheme, with more than 90% Financial Assistance allocation. This is because in-house training, which is popular among employers, is claimable under the scheme. ALAT and SBL-Khas are the next most-favoured schemes by Private Hospitals employers, at 6% Financial Assistance allocation.

OVERALL COURSE FEES (RM)

Highest Cost

Post Basic in Critical Care Nursing	14,156
Post Basic Perioperative Nursing Programme	13,316
Post Basic in Paediatric Nursing	10,800

Medium Cost

Simplified Strategic Training	1,000
Malaysian Healthcare Law 2021	930
MS 1900:2014 Internal Auditing	906

Lowest Cost

Palliative Care Seminar	50
Medical Nutrition Therapy Updates for Diabetes in Pregnancy	50
Tips to Keep Your Child Safe & Protected	30

Post Basic courses are substantially more expensive than the others as they are specialised degree programmes for experienced nurses, with a mixture of hands-on training and classroom lectures. On the other hand, simple workshops such as "Tips to Keep Your Child Safe" costs less.

SKILL AREAS

					
TRAINING PLACES	Medical or Healthcare (7,752)	Public Relations or Customer Service (2,591)	Safety and Health (1,908)	Quality and Productivity (1,737)	Team Building or Motivation (711)
					
FINANCIAL ASSISTANCE (RM)	Medical or Healthcare (3,757,230)	Quality and Productivity (606,357)	Public Relations or Customer Service (472,227)	Safety and Health (409,422)	Management or Strategic Management (346,046)

Private Hospitals focus on training courses closely related to their business, namely Medical or Healthcare and Safety and Health. Customer Service is another skill area prioritised by employers.

EMPLOYERS FEEDBACK ON TRAINING NEEDS

MASCO	TECHNICAL SKILL	NON-TECHNICAL SKILL
Skilled Workers	- Medical Procedure - Finance and Accounting - Equipment Maintenance - Ancillary - Information Systems	- Time Management - Leadership - Planning and Execution - Presentation - Communication
Semi-Skilled Workers	- Computer - Process Flow - Data Entry - Administration - Safety and Health	- Time Management - Prioritisation - Planning and Execution - Emotional Management - Presentation
Low Skilled Workers	- Driving - Grooming - Filing - Cooking and Serving	- Communication - Motivational - Problem Solving

Source: HRD Corp Training Needs Survey 2019

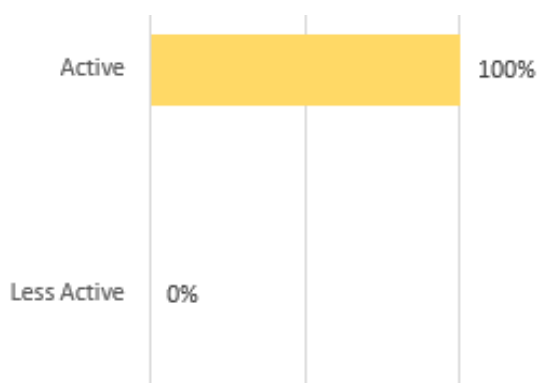
Communication Skills are frequently highlighted by employers. This is because effective communication is of utmost importance when delivering healthcare (Harvard Public Health Review, 2019).

CHALLENGES IN TRAINING



*Word cloud generated based on HRD Corp Training Needs Survey 2019

HRD CORP LEVY UTILISATION (OPINION-BASED)



Reasons for Active Usage

- Importance of training
- Improve employees' medical knowledge

Source: HRD Corp Training Needs Survey 2019

All of the employers (100%) surveyed stated that they are eager to utilise the levy, as they are aware of the importance of upskilling their workforce and increasing their medical knowledge to remain competitive in this rapidly evolving industry. Based on HRD Corp's data, 64% of levy was disbursed. The discrepancy between the survey response and actual levy utilisation indicates there is still much room for improvement. Employers noted that the challenges they face when sending employees to training programmes are time spent away, not enough manpower, cost of training courses as well as the lack of reputable trainers.

Private hospitals are forced to deal with a number of tests, including treatment prioritisation of COVID-infected or non-COVID patients; virtual or physical consultation; employee workload etc. Large employers invested RM6.4 million compared to RM1.4 million by Small & Medium employers.

INTERESTING FACTS

- 146 out of 217 registered employers utilised their levy for training in 2020.
- 94% of training places were within 70km of employers' premises.
- The average duration for Private Hospital's training lasts for 4.8 days.
- The 3rd quarter of 2020 (July-September) had the highest training activity, with 7,914 training places carried out.





CHAPTER 2:

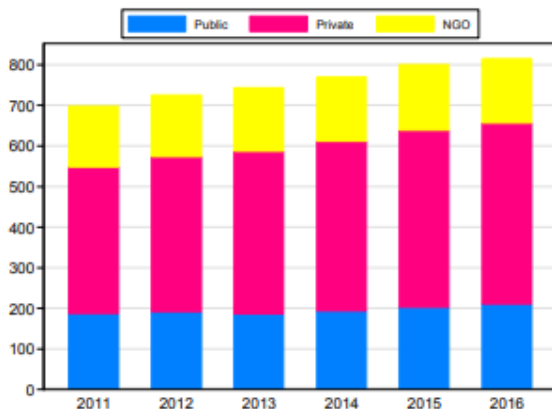
HEALTH SUPPORT SERVICES

HEALTH SUPPORT SERVICES

Definition: Any business or activity involving medical or health laboratory, dialysis centre, physiotherapy or occupational therapy centre, acupuncture, or herbalist and homeopathy services. (PSMB Act 2001)

INDUSTRY OUTLOOK

Number of Dialysis Centres in Malaysia by Sectors and Year



Source: Malaysian Society of Nephrology

Health Support Services play a vital part in improving the nations' well-being. Diabetes is a major public health concern in Malaysia, and the prevalence of type 2 diabetes (T2D) has escalated to 20.8% in adults above the age of 30 (PubMed, 2015). We consume 26 teaspoons of sugar daily, making us the eighth highest sugar users in the world (Consumer Association of Penang, 2014). The Ministry of Health projects the number of end-stage kidney disease patients to rise from 39,700 in 2016 to 106,000 in 2040, placing an estimated RM 1.5 billion to RM 3.2 billion financial burden on the nation's healthcare system. Based on the Malaysian Society of Nephrology's research, the number of

dialysis centres have been increasing every year, rising from 657 in 2011 to 761 in 2016.

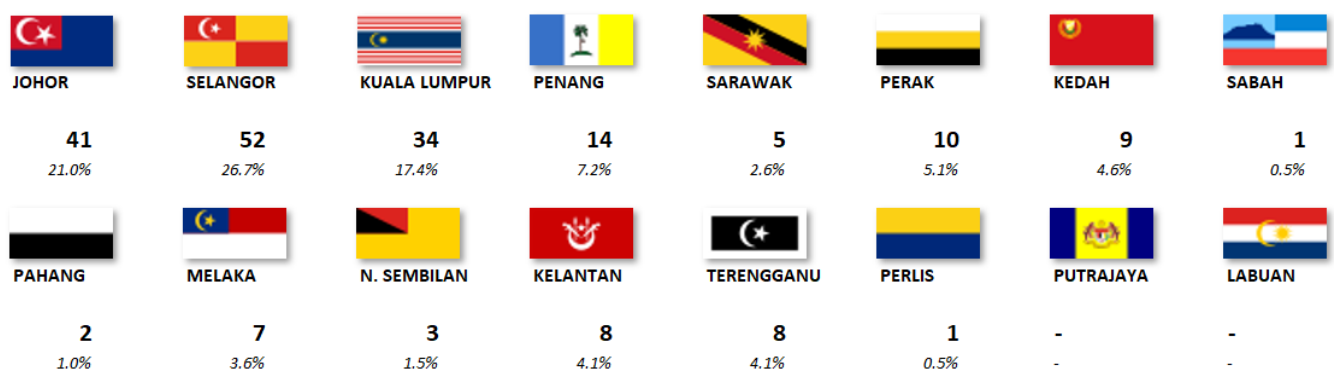
The Health Support Services industry is projected to expand steadily in the future, in line with the growth of the local healthcare sector mentioned in Chapter 1. Therefore, it is important for Malaysians to embrace a healthy lifestyle to lessen the burden on the healthcare sector.

HEALTH SUPPORT SERVICES REGISTERED UNDER HRD CORP

Source: HRD Corp data as of December 2020



NUMBER OF HRD CORP REGISTERED EMPLOYERS ACCORDING TO STATES IN 2020

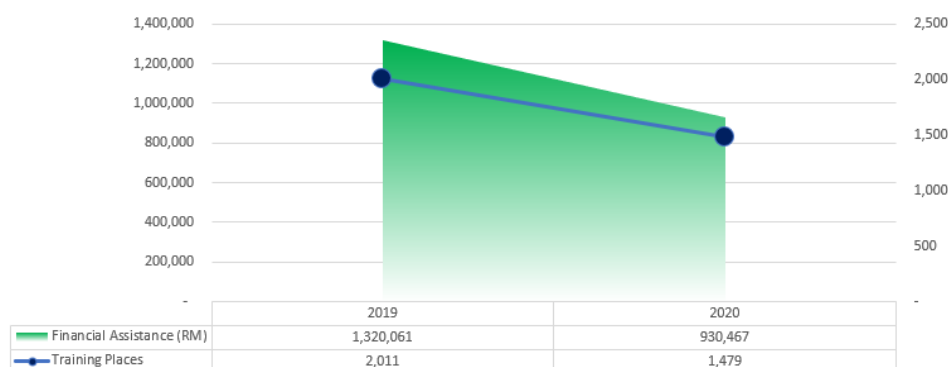


Health Support Services is concentrated in the Central and Southern regions, comprising 65% of employers.

Source: Hussein Z, Taher SW, Gilcharan Singh HK, Chee Siew Swee W (2015). "Diabetes Care in Malaysia: problems, new models, and solutions." Ann Glob Health. 2015;81(6):851-862. doi: 10.1016/j.aogh.2015.12.016.

"Malaysians must reduce sugar intake by 80%" Consumers' Association of Penang Press Statement 14th November 2014
Ministry of Health Malaysia. (2018). National Action Plan for Healthy Kidneys (ACT-KID) 2018-2025.

TRAINING OVERVIEW

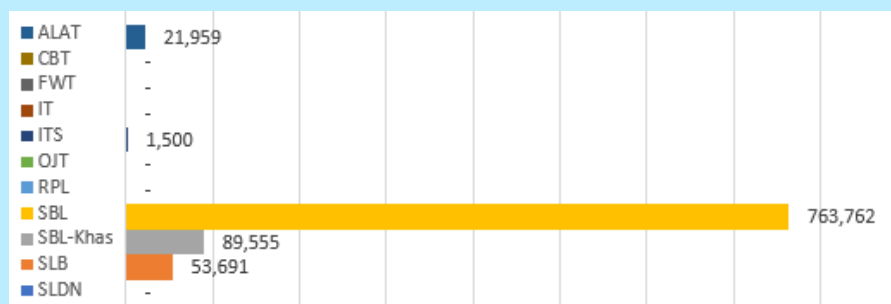


In 2020, Health Support Services retained 73% of its training places recorded back in 2019. Health Support Services is among the best performers* in 2020 as it is considered an essential subsector. RM930,000 was invested in employees training in 2020.

*Ratio of Training places in 2020/ Training Places in 2019

HRD CORP LEVY SCHEMES

Financial Assistance Approved (RM) according to HRD Corp Schemes in 2020



LEGEND

ALAT: Purchase of Training Equipment & Setting Up Training Room Scheme
CBT: Computer Based Training
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IT: Information Technology & Computer Aided Training
ITS: Industrial Training Scheme
OJT: On-the-job Training
RPEL: Recognition of Prior Experiential Learning
SBL: Skim Bantuan Latihan
SBL-Khas: Skim Bantuan Latihan Khas
SLB: Skim Latihan Bersama
SLDN: Skim Latihan Dual Nasional

SBL is the most utilised scheme due to its flexibility, as both external and in-house training can be claimed under the scheme. Other notable schemes used by Health Support Services employers include SBL-Khas, SLB and ALAT.

OVERALL COURSE FEES(RM)

Highest Cost

Post Basic	9,434
Postgraduate Certificate in Managing People & Employment Relations	8,496
Post Basic in Renal Nursing	7,999

Medium Cost

Info Tech HRMS	1,050
Employment Law for Managers: Contract, Termination & Post Covid19 Issues	995
Insight Virtual Conference	900

Lowest Cost

World Kidney Update 2020	99
Basic CPR & AED Training (BLS)	99
National Tax Seminar 2020	90

The most costly training courses for Health Support Services are primarily technical courses with longer duration. For instance, "Post Basic in Renal Nursing" and "Postgraduate Certificate in Managing People & Employment Relations". IT courses including "Insight Virtual Conference" and "Info Tech HRMS" are also well-received by employers.

SKILL AREAS

					
TRAINING PLACES	Medical or Healthcare (324)	Team Building or Motivation (288)	Quality and Productivity (259)	Safety and Health (171)	Public Relations or Customer Service (89)
					
FINANCIAL ASSISTANCE (RM)	Medical or Healthcare (301,108)	Team Building or Motivation (130,027)	Quality and Productivity (104,396)	Safety and Health (65,193)	Human Resources (56,894)

Employers focused on training courses with skills areas in Medical or Healthcare, Team Building or Motivation and Quality and Productivity.

EMPLOYERS FEEDBACK ON TRAINING NEEDS

MASCO	TECHNICAL SKILL	NON-TECHNICAL SKILL
Skilled Workers	• Management • Computer • Marketing • Medical Engineering • Information and Technology	• Leadership • Problem Solving • Communication • Time Management • Stress Management
Semi-Skilled Workers	• Safety Awareness • Logistic • Accounting • Administration • Report Writing	• Time Management • Customer Service • Sales • Problem Solving • Communication
Low Skilled Workers	• Computer • Customer Service • Housekeeping • Cleanliness • Food Service	• Team Spirit • Communication • Stress Management • Leadership

Source: HRD Corp Training Needs Survey 2019

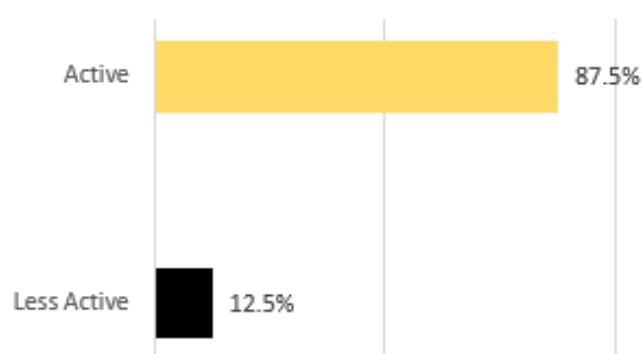
Computer skill is the most sought-after technical skill by employers of Health Support Services. As for non-technical skills, communication is paramount when dealing with patients and clients.

CHALLENGES IN TRAINING



*Word cloud generated based on HRD Corp Training Needs Survey 2019

HRD CORP LEVY UTILISATION (OPINION-BASED)



Reasons for Active Usage

- Ensure staff competency
- Upgrade skills and knowledge
- Utilise levy fully

Reasons for Less Active Usage

- Not enough manpower

Source: HRD Corp Training Needs Survey 2019

Health Support Services employers are generally receptive towards utilising the levy as they would like to ensure staff competency by upgrading their skills and knowledge in this critical field. Furthermore, employers also highlighted they would like to fully utilise the levy. Some employers pointed out that they are less active in utilising levy due to the lack of manpower if employees are sent for training. This is particularly evident during the pandemic as healthcare frontliners are constantly on standby to meet the unexpected surge in patients.

Based on HRD Corp's actual data, 59% of levy was utilised by employers. The distribution of levy utilised is relatively balanced between Large (52%) and Small & Medium (48%) employers. Employers have also encountered issues such as budget concerns, the lack of relevant training courses, as well as not enough participants to start a class.

INTERESTING FACTS

- The 1st quarter of 2020 (January-March) had the highest training activity, with 659 trainings carried out before the first Movement Control Order.
- The average duration for Health Support Services' training lasts for 5.8 days.
- 72 out of 195 employers arranged training for their employees in 2020.





CHAPTER 3:

VETERINARY SERVICES

VETERINARY SERVICES

Definition: Veterinary Services that is, the provision of control and healthcare services for farm or pet animals by veterinarians or veterinary personnel. (PSMB Act 2001)

INDUSTRY OUTLOOK



1.2 Million
Number of cats &
dogs in Malaysia

Source: Euromonitor International



Ideal Ratio:
1 Veterinarian per
5,000 population

In 2018, there were 2,500 veterinarians and 453 private veterinary clinics nationwide that were registered with the Malaysian Veterinary Council. Malaysia needs to double its number of veterinarians to achieve the ideal ratio of one pet doctor per 5,000 population, as seen in developed nations like the United States (The Star, 2018).

Additionally, Mordor Intelligence noted that the Malaysian pet food market is projected to register a compound annual growth rate (CAGR) of 6.2% during the forecast period of 2021-2026. Using pet food market and pet ownership as proxies, there is a clear need for Veterinary Services in Malaysia. Close to half of respondents (47%) in a recent 2019 survey conducted in Putrajaya by the Department of Veterinary Services (DVS) stated they own pet(s). From the survey, 67% have yet to vaccinate their pets, a specialty service provided by veterinary clinics. The demand for Veterinary Services is forecasted to increase, as public awareness of the importance of pets' vaccination and related healthcare services increases.

VETERINARY SERVICES REGISTERED UNDER HRD CORP

Source: HRD Corp Data as of December 2020



18

Employers



429

Employees



RM90,705

Levy Collected



12.7%

Levy Disbursed

NUMBER OF HRD CORP REGISTERED EMPLOYERS ACCORDING TO STATES IN 2020



JOHOR

2

11.1%



SELANGOR

7

38.9%



KUALA LUMPUR

1

5.6%



PENANG

3

16.7%



SARAWAK

1

5.6%



PERAK

-

-



KEDAH

-

-



SABAH

2

11.1%



PAHANG

1

5.6%



MELAKA

1

5.6%



N. SEMBILAN

-

-



KELANTAN

-

-



TERENGGANU

-

-



PERLIS

-

-



PUTRAJAYA

-

-



LABUAN

-

-

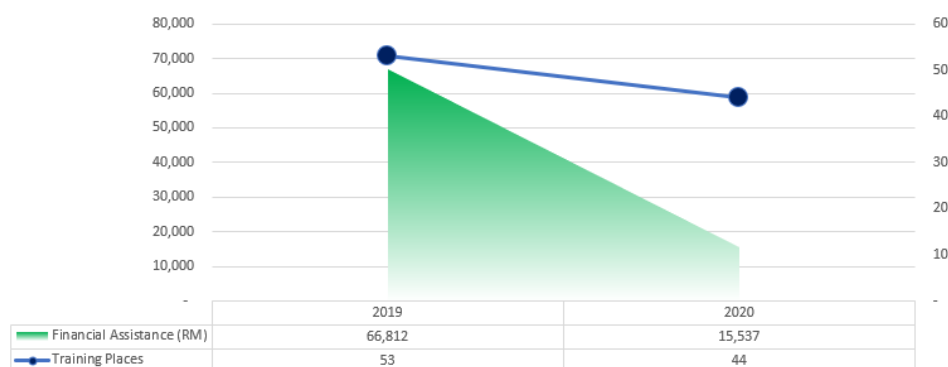
As the Pembangunan Sumber Manusia Berhad (PSMB) Act 2001 only mandates employers with 10 or more Malaysian employees to register with HRD Corp, employers in this sector that are registered with HRD Corp are low, even in the Central region.

Source: Yuen. M. (2018) "Animal Doctors Needed" *The Star* <<https://www.thestar.com.my/news/nation/2018/05/06/animal-doctors-needed/>>

Debra. M. et al. (2019) "Assessing The Status of Pet Ownership in the community of Putrajaya" *MALAYSIAN JOURNAL OF VETERINARY RESEARCH* Volume 10 No. 1 pp 61-71

"Malaysia Pet Food Market - Growth, Trends, Covid-19 Impact, And Forecasts (2021 - 2026)" (2021) *Mordor Intelligence* <<https://www.mordorintelligence.com/industry-reports/malaysia-pet-food-market>>

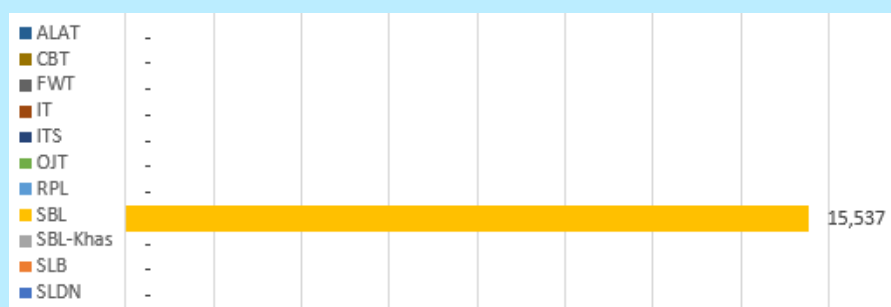
TRAINING OVERVIEW



Veterinary Services recorded 44 training places in 2020 and RM15,537 investment in training, moreover it is one of the smaller subsectors covered by HRD Corp.

HRD CORP LEVY SCHEMES

Financial Assistance Approved (RM) according to HRD Corp Schemes in 2020



LEGEND

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CBT: Computer Based Training
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SBL-Khas: Skim Bantuan Latihan Khas
SLB: Skim Latihan Bersama
SLDN: Skim Latihan Dual Nasional

SBL was the most (and only) utilised scheme for Veterinary Services.

OVERALL COURSE FEES (RM)

Highest Cost

Excel Online Class 500

Medium Cost

Seminar Pencukaian Kebangsaan 2020 180

Lowest Cost

Workplace Safety Procedure for COVID-19 Precautions 88

"Excel Online Class" cost the most at RM500 per pax. Employees from Veterinary Services also attended the "Workplace Safety Procedure for COVID-19 Precautions" course to better deal with the pandemic.

SKILL AREAS

					
TRAINING PLACES	Audit or Tax (36)	Computer or Information and Technology (3)	Medical or Healthcare (2)	Management or Strategic Management (1)	Safety and Health (1)
					
FINANCIAL ASSISTANCE (RM)	Audit or Tax (7,972)	Management or Strategic Management (2,500)	Medical or Healthcare (2,178)	Computer or Information and Technology (1,500)	Human Resources (1,200)

The vast majority of funds were invested in courses outside of Veterinary Services, such as Audit or Tax. Veterinary Services is a small and niche industry, hence finding a training provider is often challenging.

EMPLOYERS FEEDBACK ON TRAINING NEEDS

MASCO	TECHNICAL SKILL	NON-TECHNICAL SKILL
Skilled Workers	• Surgical • Disease Testing • Medication Prescription • Equipment • Diagnosis	• Compassion • Problem Solving • Analytical • Communication • Stress Management
Semi-Skilled Workers	• Administration • Human Resource • Computer • Data Entry • Accounting	• Customer Service • Problem Solving • Communication • Organising • Time Management
Low Skilled Workers	• Housekeeping • Cleanliness • Administration • Stockkeeping	• Emotional Intelligence • Communication • Organisation • Customer Service

Source: HRD Corp Training Needs Survey 2019

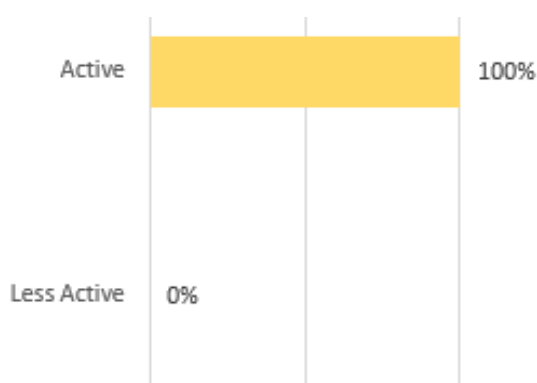
For Veterinary Services employers, technical skills required varies across skill levels, from Surgical skills for skilled workers to Stockkeeping for low-skilled workers. As for non-technical skills, Communication is a common theme for all employees as facing customers is a daily routine, aside from treating pets.

CHALLENGES IN TRAINING

suitable course
suitable trainer
small sector

**Word cloud generated based on HRD Corp Training Needs Survey 2019*

HRD CORP LEVY UTILISATION (OPINION-BASED)



Source: HRD Corp Training Needs Survey 2019

Reasons for Active Usage

- Upskill employees

100% of Veterinary Services employers responded in the survey that they are actively utilising the levy as they would like to upskill their employees. In reality, only 13% of levy collected was invested in training. The low figure can be attributed to challenges raised by employers, namely, the inability to find suitable courses and trainers as veterinary is a small sector locally. Therefore, employers have enrolled in training courses outside of their field of expertise, such as Audit and Tax, IT and Management.

INTERESTING FACTS

- The 1st quarter of 2020 (January-March) had the highest training activity, with 659 training places carried out before the first Movement Control Order.
- The average training duration for Veterinary Services was 2.8 days.
- 7 out of 18 employers claimed the levy in 2020.
- Most training places (33) were carried out in Kuala Lumpur.





SUMMARY:

HEALTHCARE INDUSTRY

SUMMARY & COMPARISON

COMPARISON IN THE GROWTH NUMBER OF HRD CORP REGISTERED EMPLOYERS AND EMPLOYEES

	2019		2020
Private Hospitals	Employers : 210 Employees : 63,387	>	217 (+3%) 63,631 (+0.4%)
Health Support Services	Employers : 174 Employees : 7,364	>	195 (+12%) 7,845 (+7%)
Veterinary Services	Employers : 14 Employees : 367	>	18 (+29%) 429 (+17%)

All three sub-sectors registered an increase in the number of employers and employees in 2020, in light of the levy exemption from April to September 2020. The increase in the number of employers registered with HRD Corp is an encouraging phenomenon as more employers covered means more training can be conducted as they have access to a structured training fund. This is in line with Malaysia's vision of having a nation driven by a skilled workforce with higher productivity as we strive to become a high income nation.

Private Hospitals have actively engaged with HRD Corp as 213 out of 250 Private Hospitals around Malaysia are covered by HRD Corp, representing 85% coverage. Health Support Services and Veterinary Services pale in comparison in this regard. For instance, the majority of veterinary clinics have compact teams with less than 10 Malaysian employees, meaning they are not mandated by the PSMB Act 2001 to contribute to the HRD levy. Under the Veterinary Services sub-sector, 18 employers have registered even though there are 253 private veterinary clinics nationwide.

CHALLENGES IN TRAINING

Most of the respondents cited lack of manpower, budget and relevant courses as the main challenges that they face in training. HRD Corp's data suggest many employees prefer to attend a variety of seminars, workshops and conferences such as "Transfusion Quality Seminar 2020" & "World Kidney Update 2020" for knowledge-sharing sessions. It is hard to find healthcare trainers who have the sufficient knowledge and experience, not to mention time, to train professionals from this highly technical field. To overcome this challenge, HRD Corp has introduced the Train-The-Trainer (TTT) programme to welcome more trainers with professional background to be certified by HRD Corp. This allows experienced professionals to train their junior peers.

TOP SKILL AREAS

The statistics show "Medical or Healthcare" and "Safety & Health" as skill areas prioritised by employers in this industry to keep employees equipped with the latest trends and information in the healthcare field. Medical professionals need to focus on improving healthcare to ensure higher quality, greater access and better value for money (The Health Foundation, 2012). On the other hand, "Public Relations or Customer Service" is another skill area that is important to establish relationships with patients for the successful diagnosis and treatment of illnesses.



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