



# MEDIA BRIEF

# VANTAGE BAY HEALTHCARE CITY

22 September 2015



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# Executive Summary

- There are strong prospects for Malaysia's healthcare industry due to demographic changes in the region and increased demand from medical tourism. Hence, Rowsley intends to reposition Vantage Bay into a healthcare city to capture these market opportunities
- The project, which will be developed in phases and expected to be worth RM5 billion in Gross Development Value, will comprise approximately 500,000m<sup>2</sup> in GFA (subject to finalisation)
- The development, when completed, will be one of the largest and most comprehensive healthcare cities in the region
- Rowsley is well positioned to carry out the Vantage Bay Healthcare City development by leveraging on
  - a. RSP's expertise as a master planning, architectural and engineering consultant
  - b. Vantage Bay's strategic location to cater to the local population and medical tourists in the region
- Rowsley will be the master planner and developer for Vantage Bay Healthcare City and will partner established healthcare and related players for the various components of the healthcare city



MALAYSIA

VANTAGE BAY  
HEALTHCARE CITY

Senai-Desaru Highway

North-South Highway

Pasir Gudang Highway

Bandar Seri Alam

Jalan Skudai

Johor Golf & Country Club

JB City Centre

Danga Bay

Taman Bukit Indah

Coastal Highway

Pasir Gudang

Causeway

Woodlands North  
Woodlands  
Woodlands South

Educity

Legoland

Puteri Harbour

Medini

Motorsports City  
(Upcoming)

CIQ

Tuas  
Second Link

CIQ

Joo Koon

Jurong East

Punggol

Pasir Ris

Changi  
International Airport

Orchard

Raffles Place





VANTAGE BAY  
HEALTHCARE CITY

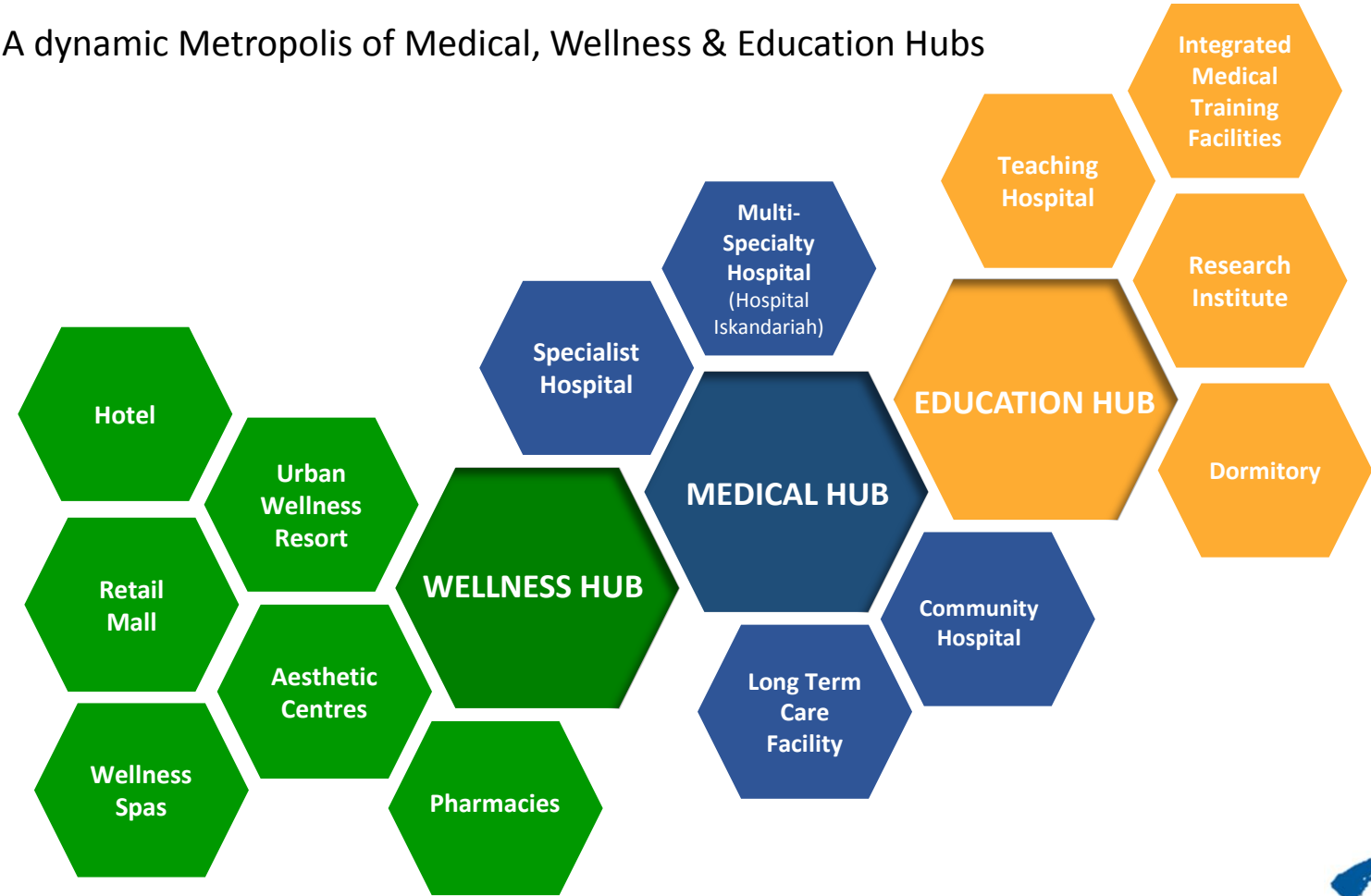
JOHOR BAHRU

STRAITS OF JOHOR

SINGAPORE

# Vantage Bay Healthcare City

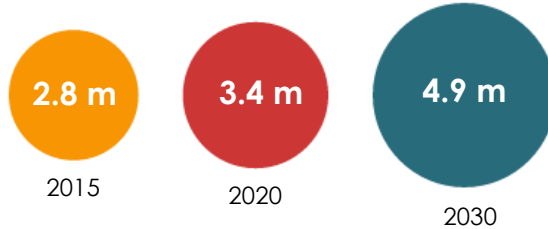
A dynamic Metropolis of Medical, Wellness & Education Hubs



# Drivers for Medical & Wellness Hubs

## Ageing Populations

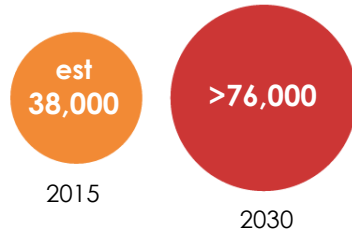
Malaysians aged 60 years & older



Singaporeans over 65 by 2030



Dementia Patients in Singapore

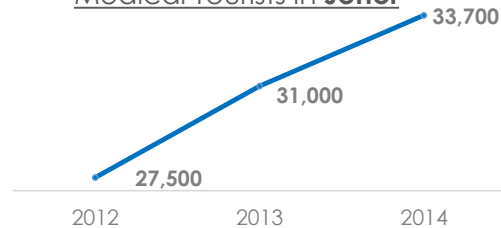


## Medical Tourism in Malaysia

Medical Tourists in All Malaysia



Medical Tourists in Johor



## Affordable Medical in Malaysia



*Heart Bypass*  
 Singapore US\$18,000  
 Malaysia US\$9,000

*Knee Replacement*  
 Singapore US\$13,000  
 Malaysia US\$8,000

## Demand for Healthcare

### Shortage of Long-term Care Facilities

THE STRAITS TIMES

Singaporeans sick and elderly pack Johor Bahru nursing homes



Operators said demand for nursing home space here will only grow, given Singapore's ageing population, creating a spill-over effect across the Causeway.

The Straits Times, 15 Mar 2015

## Increase in Elderly Living Alone

83,000

Seniors in Singapore living alone by 2030

Sources:  
 Department of Statistics Singapore,  
 Department of Statistics Malaysia,  
 Global Health and Travel 2013,  
 Malaysia Healthcare Travel Council

IMTJ  
 2015 MEDICAL  
 TRAVEL  
 AWARDS

Malaysia was awarded Medical Travel Destination of the Year in 2015, by UK's International Medical Travel Journal.





# Drivers for Education Hub

Huge potential for professional healthcare training in Malaysia

MEDICAL



**1:633**

Malaysia's doctor-to-population ratio in 2013

WELLNESS



**1:400**

Malaysia government's target doctor-to-population ratio

EDUCATION



**27,559** doctors

in shortage based on government's target in Malaysia in 2013



**1:333**

Malaysia's nurse-to-population ratio in 2013

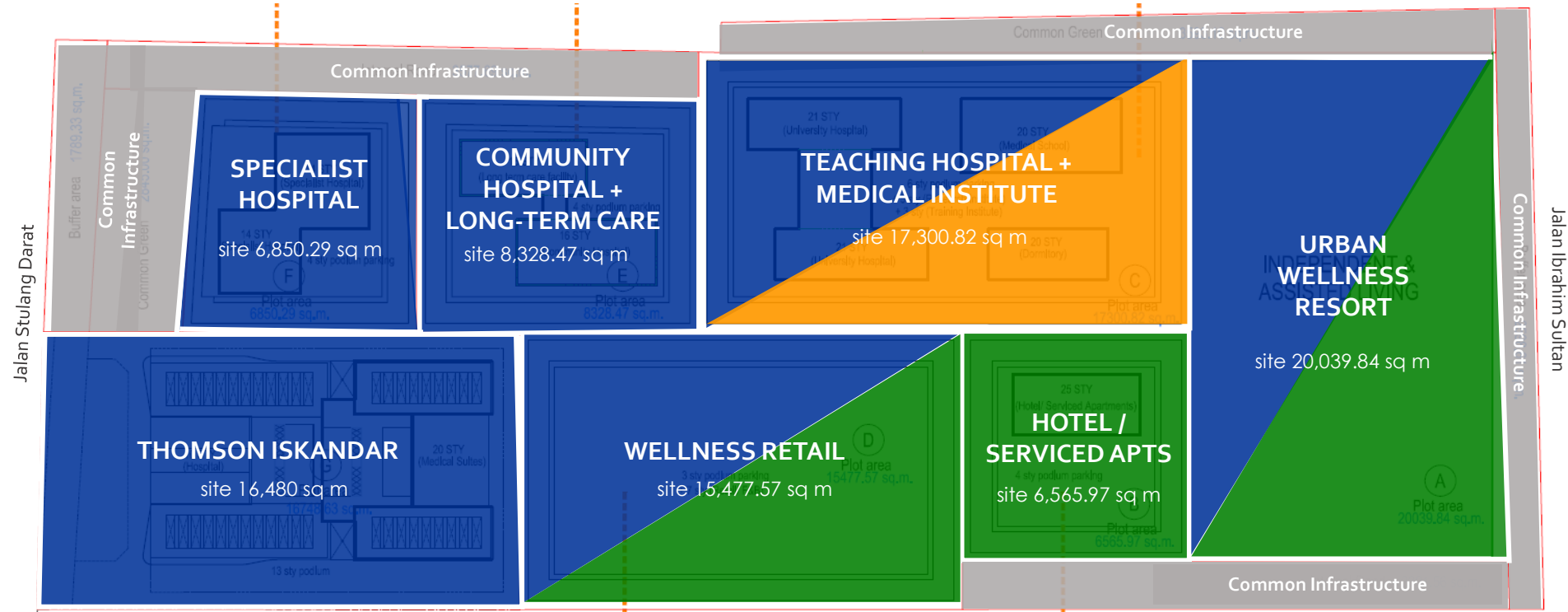


**1:150**

Singapore's nurse-to-population ratio in 2013



# Master Plan



Subject to further detailed design

Medical Wellness Education

# Specialist Hospital



Specialist Hospital with possible specialisations in one or more of the following, depending on the demands of the market:

Heart

Oncology

Eye



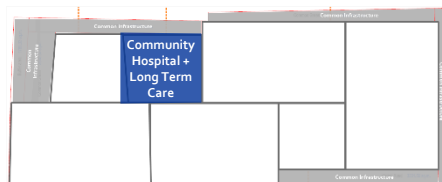
# Community Hospital | Long-Term Care



Community Hospital to offer short-term, step-down therapy and treatment for the gradual recovery of patients after they are discharged from a hospital

The stay may be from 2 weeks to 6 months before the patients recover and regain their functional abilities

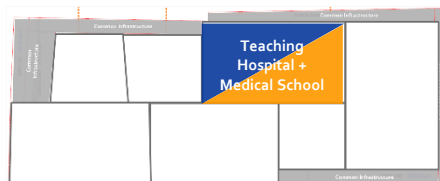
Long-Term Care Facility will provide nursing care and assistance in daily activities for the aged who are unable to live independently



# Teaching Hospital | Medical School



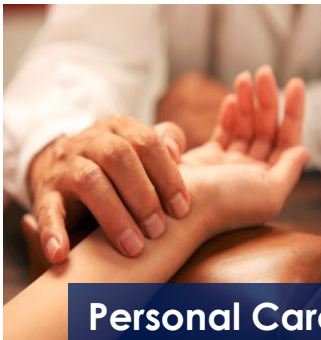
Teaching Hospital will provide affordable healthcare services, while catering to medical and nursing students' clinical training





# Wellness Retail

Traditional Chinese Medicine



Aesthetics



Personal Care & Beauty

Spinning Studio



Kids Play Gym



IT Enrichment Classes



Sports & Play

Enrichment



Spa



Pharmacy



Mixed Martial Arts Gym



Sports Concept Store



Music Lessons

Wellness-themed retail mall will house tenants offering products and services in sports, enrichment, personal care and beauty



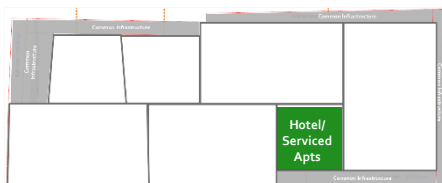
# Hotels & Serviced Apartments



Cater to medical tourists and their family members visiting the Healthcare City for medical treatments

Hotel rooms with coastline views

Provide event space for medical and healthcare conferences



# Urban Wellness Resort | Target Market

Age	Silver generation above 55 years
Nationality	Malaysians, Singaporeans, Chinese, Japanese
Target Segment	Middle to Upper Middle income





# Recreational Amenities

Reading Room / Lounge



Dance Studio



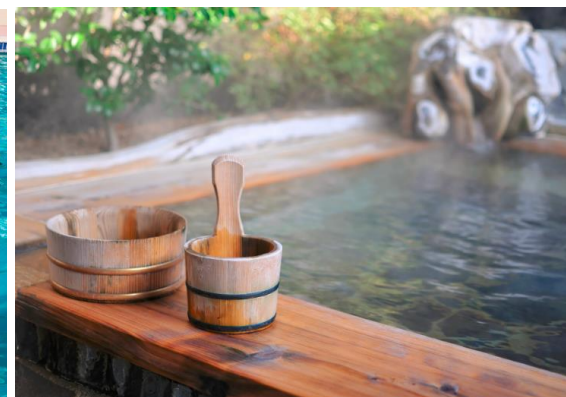
Art Room



Fitness Centre



Aqua Gym



Onsen



# Active Ageing for Residents

Cycling



Trekking



Gardening



Fishing



Golf



Tai Chi

# Promoting Social Interaction





# Services in Wellness Resort

Housekeeping , Laundry



Delivery Services



Meals Provision



Home Nursing



Medical Concierge  
Wellness Consultant



Home Therapy

# Rowsley's Strategy for Vantage Bay Healthcare City

## Strategy

Rowsley will transform Vantage Bay into a Healthcare City to create an integrated metropolis of Medical, Wellness and Education, by harnessing the master planning, design and development capabilities within the Group, so as to create a strong recurring income stream and future capital appreciation for Vantage Bay and all stakeholders.

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## Strategic Partnerships

With real estate at its core, Rowsley will be the master planner and developer for the Healthcare City while actively seeking established healthcare service providers to be strategic investors and partners for the various components of the Healthcare City.

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## Project Timeline and Phasing

Project will be phased over 10 years.



# RSP Group's Expertise

Strong track record in master planning and designing education institutes, commercial and residential real estate

The Pinnacle @ Duxton



CapitaGreen



The Oberoi Hotel Gurgaon



Ascott Raffles Place



ITE College Central



LASALLE College of the Arts



ION Orchard



St Regis Hotel KL

# RSP Group's Expertise

Strong track record in master planning and designing healthcare infrastructure

Jurong East Nursing Home, Singapore



Parkway East Hospital, Singapore



Sarawak International Medical Centre



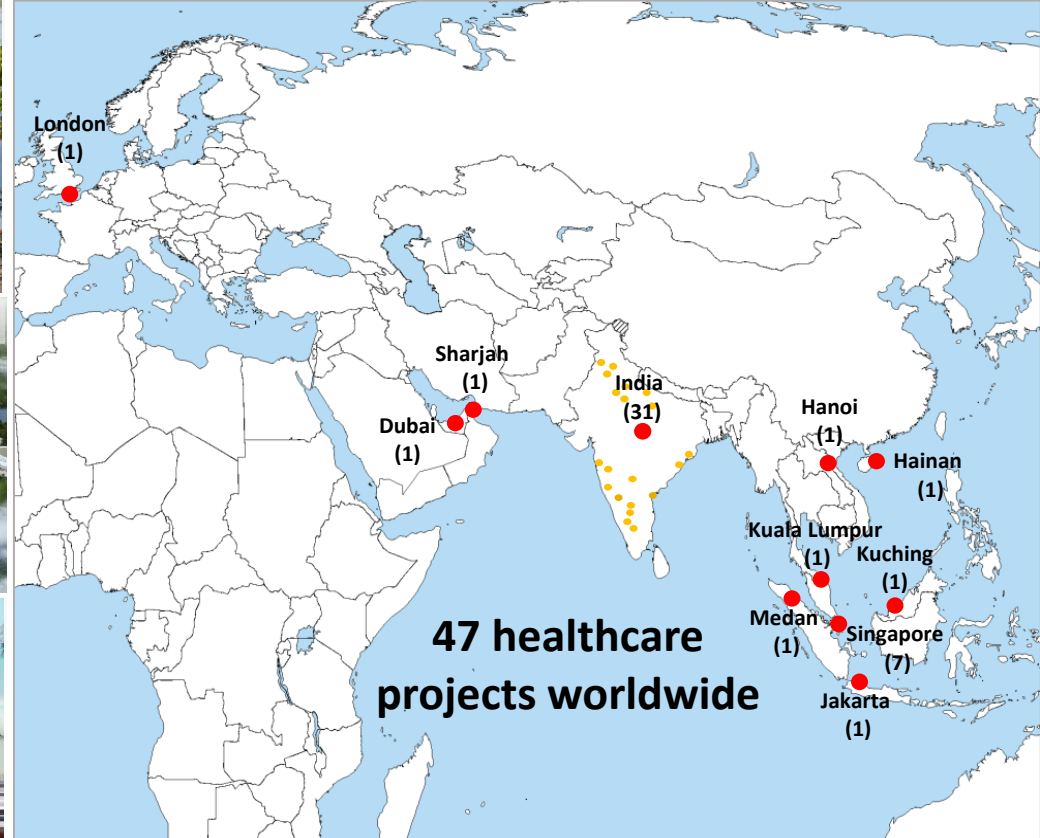
Cochi Medical City, Kochi



Military Hospital, Sharjah



Columbia Asia Hospital, Vietnam





# Market Positions of Healthcare Cities

	Dubai Healthcare City*	Novena Medical Cluster*	Vantage Bay Healthcare City
<b>Overview</b>	<ul style="list-style-type: none"> <li>A government initiative</li> <li>Launched in 2002</li> <li>Estimated GFA: 950,000m<sup>2</sup></li> </ul>	<ul style="list-style-type: none"> <li>Master planned by government → A cluster of government and private healthcare facilities</li> <li>Development started in late 1990s and it is still in progress (→ 2025)</li> <li>Estimated GFA: 600,000m<sup>2</sup></li> </ul>	<ul style="list-style-type: none"> <li>A private initiative</li> <li>Phase 1 development to comprise Hospital Iskandariah and medical suites</li> <li>Projected GFA: est. 500,000m<sup>2</sup></li> </ul>
<b>Medical Component</b>	<ul style="list-style-type: none"> <li>Hospitals (2017: 679 beds)                             <ul style="list-style-type: none"> <li>Mediclinic City Hospital</li> <li>Dr Sulaiman Al-Habib Hospital</li> <li>Medanta Hospital (2017)</li> </ul> </li> <li>120 Outpatient medical centres &amp; diagnostic laboratories (dentistry, therapy, O&amp;G, general/family medicine, plastic surgery, etc)</li> </ul>	<ul style="list-style-type: none"> <li>Hospitals (2018: 2,063 beds)                             <ul style="list-style-type: none"> <li>Mt Elizabeth Novena</li> <li>Tan Tock Seng Hospital ^</li> <li>Ren Ci Community Hospital #</li> <li>National Centre for Infectious Disease (2018)^</li> </ul> </li> <li>Outpatient medical centres (2016: 382 units)                             <ul style="list-style-type: none"> <li>Novena Medical Centre</li> <li>Novena Specialist Centre</li> <li>Royal Square (2016)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Hospitals (~850 beds)                             <ul style="list-style-type: none"> <li>Hospital Iskandariah</li> <li>Community Hospital</li> <li>Specialist Hospital</li> </ul> </li> <li>Long Term Care facilities (~200 beds)</li> <li>Medical Suites</li> </ul>
<b>Education Component</b>	<ul style="list-style-type: none"> <li>Mohammed Bin Rashid University of Medicine &amp; Health Sciences (2017)</li> <li>Khalaf Ahmad Al Habtoor Medical Simulation Center</li> <li>Al Maktoum Medical Library</li> <li>Hamdan Bin Mohammed College of Dental Medicine</li> </ul>	<ul style="list-style-type: none"> <li>Clinical Sciences Building ^</li> <li>LKY Medicine (2018) ^</li> </ul>	<ul style="list-style-type: none"> <li>Research institute</li> <li>Integrated Medical Training Facility</li> <li>Teaching Hospital (~300 beds)</li> <li>Dormitories</li> </ul>
<b>Wellness / Commercial Component</b>		<ul style="list-style-type: none"> <li>Hotels                             <ul style="list-style-type: none"> <li>Oasia</li> <li>Marriot Courtyard (2016)</li> </ul> </li> <li>Commercial (malls, F&amp;B, office)                             <ul style="list-style-type: none"> <li>Novena Square office tower</li> <li>Velocity@Novena</li> <li>Square 2</li> <li>Royal Square (2016)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Urban Wellness Resort</li> <li>Wellness Spas</li> <li>Hotel</li> <li>Retail Mall</li> <li>Pharmacies</li> <li>Aesthetic Centre</li> <li>TCM Centre</li> </ul>

# Conclusion

- Industry prospects for healthcare services and training are underpinned by Asia's ageing profile and current underinvestment in healthcare infrastructure and manpower training
- With RSP's track record in delivering healthcare projects, Vantage Bay Healthcare City can leverage on the growth of the regional healthcare industry to reposition itself into a healthcare city
- Vantage Bay Healthcare City will create a comprehensive regional healthcare metropolis, delivering best-in-class services in partnership with reputable healthcare players