

DIGITAL PRODUCTIVITY ROADMAP

Tourism Productivity Nexus

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FOREWORD KP



Datuk Zahid Ismail
Director General
Malaysia Productivity Corporation

The Digital Productivity Roadmap for Private Healthcare is a strategic initiative to accelerate digital adoption, enhance efficiency, and drive innovation across the sector. As healthcare demands evolve, digital transformation is no longer a luxury but a necessity. This roadmap provides a structured framework for private healthcare providers to leverage digital technologies—such as artificial intelligence, big data, and automation—to improve service delivery, optimize operations, and enhance patient outcomes.

Malaysia’s private healthcare sector has long been a pillar of excellence, attracting both local and international patients. However, to sustain this competitive edge, embracing digital productivity is crucial. By integrating digital solutions, healthcare providers can streamline workflows, reduce administrative burdens, and deliver more personalized and efficient patient care. Telemedicine, electronic medical records, and predictive analytics will be key enablers in ensuring greater accessibility, affordability, and quality of healthcare services.

MPC remains committed to supporting the private healthcare industry in this digital transformation journey. Through collaboration with stakeholders, policy advocacy, and capability-building programs, we will drive the adoption of digital best practices to enhance productivity and competitiveness. I encourage all industry players to embrace this roadmap and collectively work towards a future where Malaysia’s private healthcare sector stands as a global leader in digital innovation and patient-centric excellence.

FOREWORD CHAMPION



Mr Rohizam Md Yusoff
Champion
Tourism Productivity Nexus

The Digital Productivity Roadmap for Private Healthcare marks a significant step in harnessing technology to enhance efficiency, patient care, and overall industry resilience. As digital transformation continues to reshape global healthcare landscapes, private healthcare providers in Malaysia must embrace cutting-edge solutions to remain competitive. This roadmap provides a structured approach to integrating digital tools such as artificial intelligence, data analytics, and automation to streamline operations, reduce costs, and improve service delivery.

With a rapidly aging population and rising healthcare demands, digital adoption is no longer optional but a necessity. By leveraging digital technologies, private healthcare institutions can enhance patient outcomes through predictive analytics, personalized treatment plans, and seamless digital health records. Moreover, telemedicine and remote monitoring solutions are revolutionizing patient engagement, ensuring that quality healthcare is accessible beyond traditional hospital settings.

Collaboration between industry players, technology providers, and regulatory bodies is crucial to realizing the full potential of digital productivity. This roadmap serves as a call to action for private healthcare leaders to invest in digital capabilities and foster a culture of continuous innovation. By embracing this transformation, we can build a more efficient, patient-centric, and future-ready private healthcare sector that upholds Malaysia's reputation as a regional healthcare hub.

INDUSTRY OVERVIEW AND DIGITALISATION CHALLENGES

The private healthcare sector, with numerous establishments and a strong workforce, drives GDP through hospitals, clinics, and diagnostics. Its value chain includes pharmaceuticals, medical suppliers, and insurers. Despite digitalization boosting productivity, challenges remain—departmental interoperability gaps, staff reluctance due to training gaps and job concerns, and frequent digital disruptions affecting patient services.

Industry Overview

	Overall Tourism	Travel Agency / Tour Operators
No. of Establishment	+/- 500,000	5,392
No. of Employees	3.6 million (23% of total employment)	60,000 – 80,000 employees (sales, tour guides, transport and admin staff)
GDP Contribution	14 – 15%	RM5 – 7 billion
Productivity Level	RM90,811	

Challenges in Digitalisation

1. Many small and medium-sized tourism businesses in Malaysia face challenges in adopting digital tools due to limited resources and technical expertise.
2. The tourism sector suffers from a fragmented customer experience as many businesses fail to offer seamless and integrated digital services.
3. Limited access to high-speed internet and outdated technology infrastructure, especially in rural areas, slows down digital transformation in the tourism industry.

Value Chain



The tourism value chain highlights key activities and services that drive the sector. It begins with travel organization and booking through agents and tour operators, followed by transportation (airlines, buses, taxis, etc.) and accommodation (hotels, homestays, hostels). Tourism assets and destinations include various attractions like man-made, eco-tourism, historical, and cultural sites. Support services, such as security, retail shops, food and beverages, internet cafes, and information centers, enhance the travel experience, providing essential services for tourists.

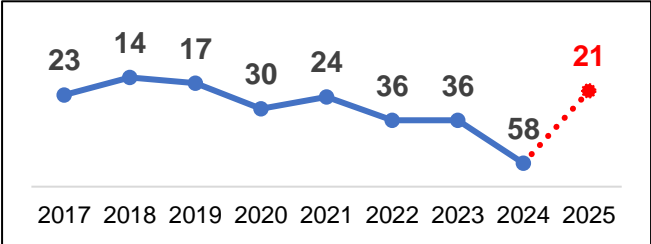
Boosting Enterprise Productivity Through Digital Roadmap

Malaysia's digital adoption has seen a worrying decline, as shown in the **Use of Digital Tools and Technologies, Digital Transformation in Companies, and Digital/Technology Skills** rankings. The **sharp drop in 2024** suggests businesses are struggling to adopt digital tools, scale transformation efforts, and build necessary skills. This downward trend highlights a growing gap in digital readiness, limiting enterprise competitiveness in an increasingly digital economy.

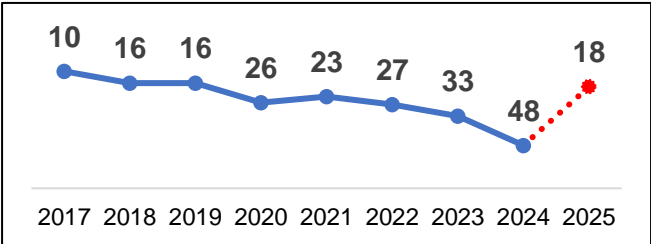
Key challenges include **high costs, lack of expertise, and inconsistent digital skills development**, which hinder businesses from fully embracing digitalisation. Without intervention, Malaysia risks falling behind global competitors. A structured approach is needed to support industries in adopting technology and strengthening their digital capabilities.

To tackle this, **MPC is launching the 'Boosting Productivity of Enterprises via Digital Roadmap' initiative**. This roadmap will provide guidance, industry-driven insights, and structured support to help businesses integrate digital solutions. By addressing gaps in **tools, transformation strategies, and workforce skills**, MPC aims to **revive digital adoption, enhance productivity, and drive Malaysia's enterprises toward global competitiveness**.

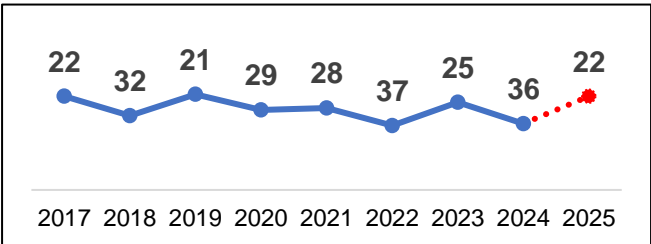
i) Use of Digital Tools and Technology



ii) Digital Transformation in Companies



iii) Digital/Technological Skills



Building a Strong Digitalization Ecosystem for Enterprise Transformation.

The figure illustrates a structured approach to strengthening the digitalisation ecosystem by aligning technology supply with industry demand.

Step 1 - The process begins with identifying the requirement profile of enterprises which is part of the 1.1 million of overall number establishment in Malaysia, ensuring a clear understanding of industry needs

Step 2 - To address these needs, the availability and affordability of solution providers are assessed and strengthened through key enablers such as MDEC and KD

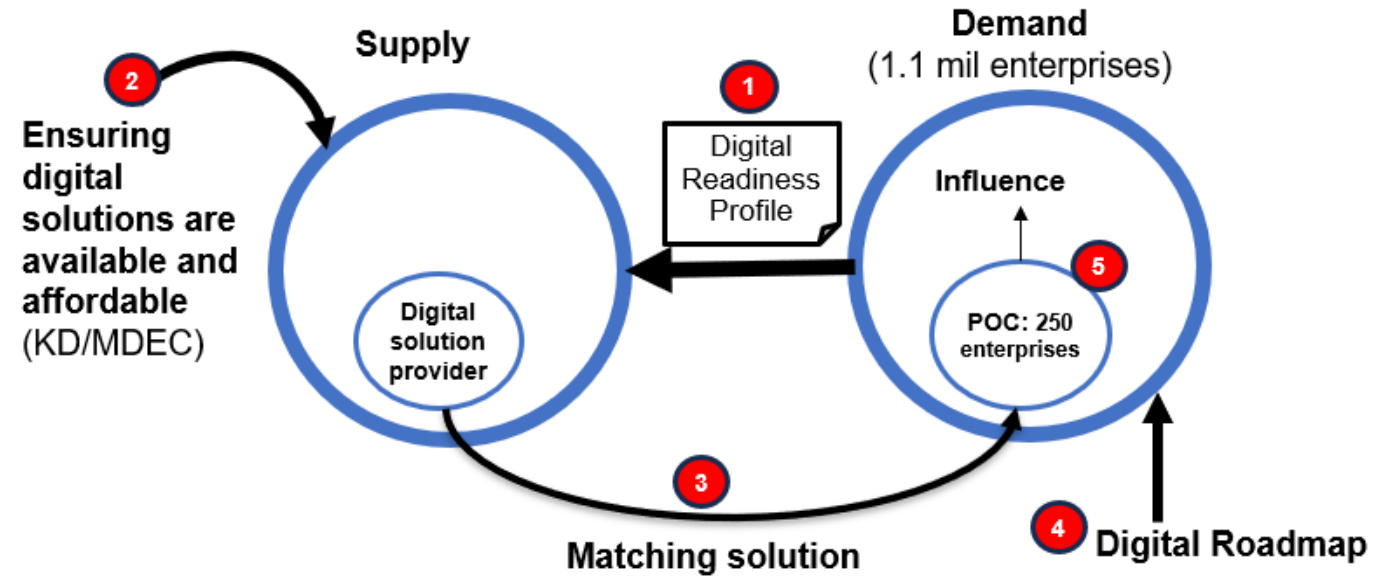
Step 3 - Digital solution providers then provide matching digital solutions tailored to industry demands, facilitating effective adoption.

Step 4 - To drive large-scale implementation, a Digitalization Roadmap is published to provide strategic guidance and best practices

Step 5 - A proof of concept (POC) involving 250 enterprises is conducted to demonstrate impact and influence broader industry adoption

This initiative fostering a robust ecosystem that accelerates digital transformation across enterprises.

Action: Improving the ecosystem to encourage adoption, transformation, and skill enhancement for technology utilization.



Digital Adoption In **Tourism** Industry

This table outlines the progressive stages of digital adoption across various functions in **travel agency** services, categorizing them into **Basic, Intermediate, and Advanced** levels to illustrate the industry's transformation journey toward enhanced efficiency, automation, and AI-driven insights.

Category	Functions in Services	Basic	Intermediate	Advanced
Customer Engagement	Booking & Reservations Customer Support	<ul style="list-style-type: none"> Manual booking via phone/email, Excel for records Phone-based support & email inquiries Customers Feedbacks 	<ul style="list-style-type: none"> Online booking system CRM for customer tracking & automated responses 	<ul style="list-style-type: none"> AI-powered chatbots & dynamic pricing AI-driven support with predictive assistance
		<p>Suggested Tools</p> <p>Gmail, Google Drive, Microsoft Outlook, OneDrive-Trello, Slack</p>	<p>Suggested Tools</p> <ul style="list-style-type: none"> - TravelPerk, Rezdy - HubSpot, Zoho CRM 	<p>Suggested Tools</p> <ul style="list-style-type: none"> - Amadeus, Sabre AI, ChatGPT-powered assistants - Salesforce Einstein, Freshdesk AI

For more info on the digitalisation tools, go here <https://www.mpc.gov.my/digitalplatformnetwork>

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Marketing & Sales	Digital Marketing	<ul style="list-style-type: none"> Basic social media presence 	<ul style="list-style-type: none"> Digital ad campaigns, email marketing Data-driven marketing campaign Data-driven upselling 	<ul style="list-style-type: none"> AI-driven marketing automation, chatbots AI-driven analytics AI-driven predictive marketing campaign AI generated promotion materials
		<p>Suggested Tools</p> <ul style="list-style-type: none"> - Facebook, Instagram, TikTok, Little Red Book (China), Whatsapp Marketing, Qrcode marketing *look into different countries social media *look into more tools in China / Arab market 	<p>Suggested Tools</p> <ul style="list-style-type: none"> - Canva - Google Ads, Google Analytics, Mailchimp, Whatsapp Marketplace 	<p>Suggested Tools</p> <ul style="list-style-type: none"> - Marketo, Hootsuite AI, ChatGPT for marketing

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Operations & Process Management	Itinerary Planning Supplier & Partner Coordination	<ul style="list-style-type: none"> Manual itinerary creation Phone/email coordination with hotels, airlines E-invoicing 	<ul style="list-style-type: none"> Online itinerary builders Centralized travel management systems Integrated booking system 	<ul style="list-style-type: none"> AI-powered itinerary personalization Blockchain-based smart contracts Real-time API integration Integrated booking system
		<p>Suggested Tools</p> <ul style="list-style-type: none"> Word, Excel, LHDN E-invoicing 	<p>Suggested Tools</p> <ul style="list-style-type: none"> Travefy, TripCreator Travelport, Expedia Partner Central Qrcode itinerary builder GDS 	<p>Suggested Tools</p> <ul style="list-style-type: none"> Amadeus API, Roam Around AI Winding Tree, API TravelFusion Conquer (KIV)

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Payments & Transactions	<ul style="list-style-type: none"> Payment Processing 	<ul style="list-style-type: none"> Manual invoicing, bank transfers 	<ul style="list-style-type: none"> Online payments, e-wallet integration 	<ul style="list-style-type: none"> AI-powered fraud detection & dynamic pricing
		<p><u>Suggested Tools</u></p>	<p><u>Suggested Tools</u></p> <ul style="list-style-type: none"> PayPal, Stripe, Razorpay 	<p><u>Suggested Tools</u></p> <ul style="list-style-type: none"> Mastercard AI, Payoneer AI
Analytics & Insights	<ul style="list-style-type: none"> Customer Data & Insights Data to Analyse Market 	<ul style="list-style-type: none"> Manual customer data tracking 	<ul style="list-style-type: none"> Data analytics dashboard 	<ul style="list-style-type: none"> AI-driven predictive analytics for demand forecasting
		<p><u>Suggested Tools</u></p> <ul style="list-style-type: none"> Excel, Forms 	<p><u>Suggested Tools</u></p> <ul style="list-style-type: none"> Google Analytics, Power BI 	<p><u>Suggested Tools</u></p> <ul style="list-style-type: none"> Tableau AI, IBM Watson Analytics

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Digital Transformation Journey



Basic

Manual booking and communication

Intermediate

Integrated online booking system

Advanced

AI-driven

THANK YOU