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Farizal B. Jaafar Acting Chief Executive Officer Malaysia Healthcare Travel Council (MHTC)

Over 25 years of professional experience in leading corporate and growth strategy, digital marketing, data analytics, business development, and operational transformation.

Worked successfully in government-linked organisations, multinational, and local conglomerates spanning various industries, in Malaysia, the United States, and the Asia Pacific region.

Proficiency in sales and marketing, branding, digital, business development, and market trend analysis have been instrumental in leading national-level healthcare programmes and the implementation of global marketing strategy and campaigns.

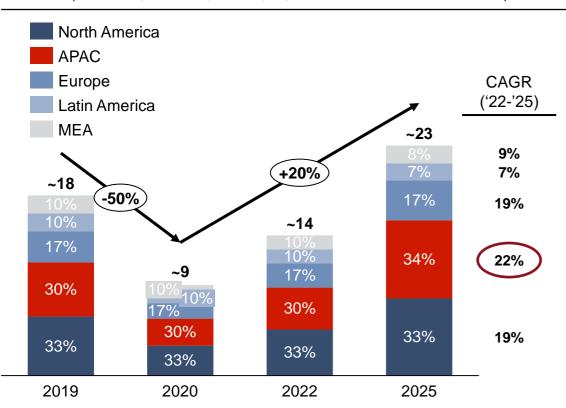
Leveraging the wealth of experience and exceptional leadership skills, Farizal is spearheading MHTC with a focus on establishing long-term strategic partnerships and formulating new revenue opportunities for the organisation and the industry.

Asia emerges as the principal beneficiary of the flourishing medical Malassia. tourism industry, garnering substantial demand from both domestic and international patients

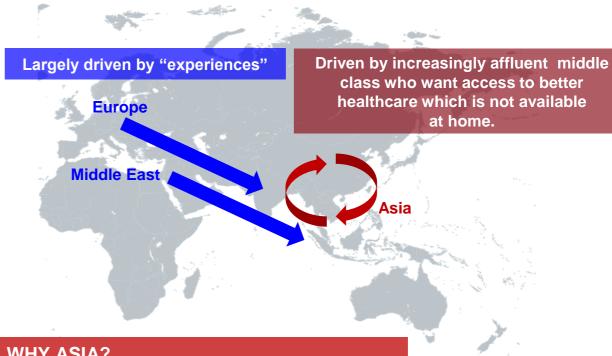


Global medical tourist revenue and growth by geography

(Revenue, USD Bn; CAGR, %, 2019- 2020 vs. 2022 vs. 2025)



Source: IMTJ,2018; Euromonitor, 2018; The Business Research Company, 2022



WHY ASIA?

- Early access to innovative treatment
- Access to experimental treatment & diagnostics not available in origin countries - SG is seen as the Asia hub for access to whole genome sequencing
- Access to world-renowned KOLs / KOCs
- Relatively lower cost of treatment vs other regions
- Sought-after holiday destinations

PEACE OF MIND

Malaysia Healthcare Travel Council (MHTC), the driving force of medical tourism in Malaysia



Malaysia Healthcare Travel Council (MHTC) is an agency established under the purview of the Ministry of Health responsible for developing and nurturing the Malaysia Healthcare brand.

MHTC facilitates and promotes the healthcare travel industry of Malaysia by coordinating industry collaborations and building valuable public-private partnerships, at home and abroad.

MHTC has 97 Member Facilities accredited by international bodies, committed delivering high-quality healthcare services. (22 Elite Hospital Members | 62 Ordinary Hospital Members | 13 Affiliate Members)

MHTC aims to elevate the healthcare travel industry – through exemplifying best experience from all aspects, by having an active ecosystem, strong Malaysia Healthcare brand and market strategies.

The Malaysia Healthcare brand aims to fulfil the aspirations of positioning Malaysia as the leading destination for healthcare.

Malaysia's healthcare travel industry is a **significant key export service** for the country.





MHTC Elite Members

















































A 5-year Industry Blueprint, cultivating groundbreaking strategies to set Phealthcare the momentum forward towards Malaysia Healthcare's 2025 aspiration



Malaysia Healthcare Travel Industry Blueprint 2021 - 2025

Experience

Affordability

Hospitality

Quality

Safety

INDUSTRY REVENUE RM 2.0 BILLION BY 2025

"Best

- Medical excellence
- Service excellence
- Seamless journey

Malaysia Healthcare Travel

- Destination branding for Malaysia in
 - healthcare travel industry

Three (3) strategic pillars

Healthcare Travel Ecosystem

Malaysia Healthcare Brand

Markets Growth, Seeding and Niche

By 2025"

Five-year

strategy

timeline

Malaysia Healthcare Travel Industry **Blueprint Aspiration**

We aspire to provide the best healthcare travel experience to healthcare travelers seeking treatment in Malaysia with

"experience" being the primary industry focus within the next five (5) years

Two (2) phases approach

2021 - 2022Focus: Reinforce Malavsia Healthcare's profile

2023 - 2025

Focus: Enhance niche branding and offerings

Rebuild

Download Now!

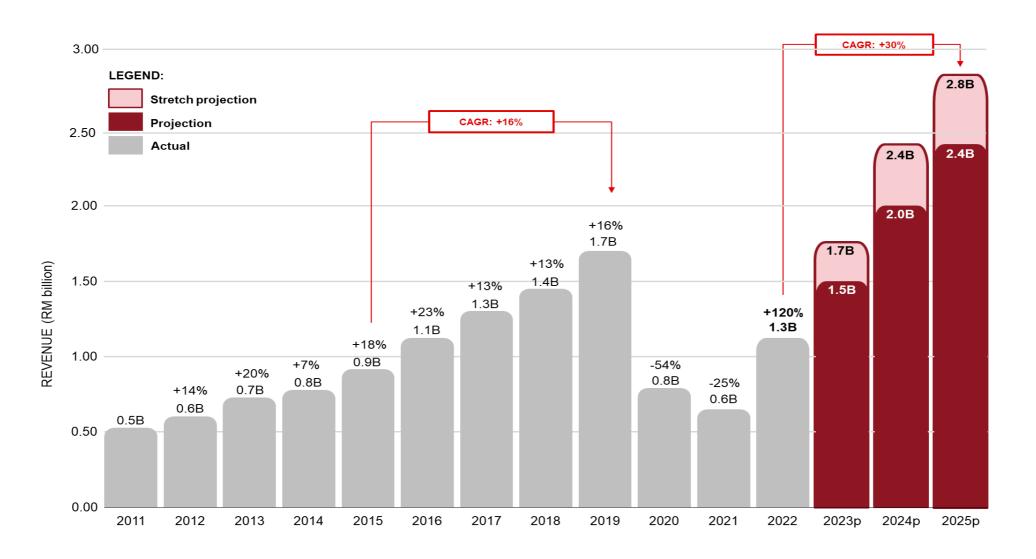


tinyurl.com/MHBlueprint

BEST MALAYSIA HEALTHCARE TRAVEL EXPERIENCE

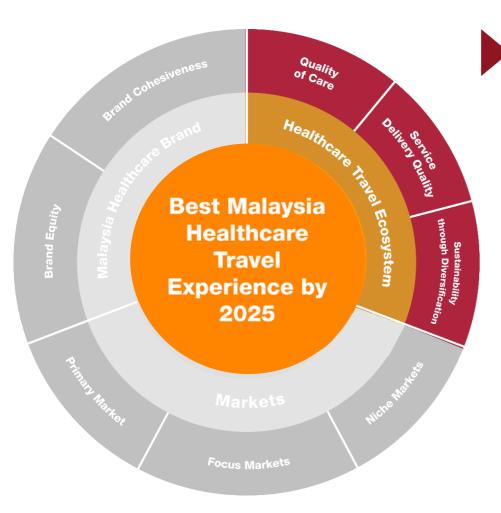
MHTC is optimistic that industry will return to pre-pandemic levels two (2) PHEALTHCARE years ahead of the initial targeted timeline of 2025





The Flagship Medical Tourism Hospital (FMTH) programme is a key initiative under the Blueprint's "Healthcare Travel Ecosystem" Pillar





Healthcare Travel Ecosystem Pillar:

Outlines strategic initiatives which focus on providing a seamless experience through medical and service excellence in medical services, providing the "Best Malaysia Healthcare Travel Experience by 2025".



First-of-its-kind programme witnessing Malaysia's top private medical establishments increasing their commitment and efforts to raise the bar of excellence in delivering exceptional end-to-end services to patients.

The development and recognition of an iconic Flagship Medical Tourism Hospital status will raise Malaysia's Global Healthcare profile.

Brings long-term benefits to the development of Malaysia's healthcare industry and the nation – global profiling, economic growth, job creation, increased employment opportunities, tax revenue generation, and positive fiscal impacts.

FMTH Programme is developed based on a structured mechanism to Malausia assess hospitals and provide support to finalists over 5-years (2021-2025)





Act as a catalyst to drive and elevate Malaysia's Private Healthcare Services



Goal

To establish and garner international recognition for Malaysia's FMTH(s)



Target for finalists

- Direct investments in healthcare of RM 250 million (US\$ 53.1 million) and above per **hospital** from 2019-2025
- Increase healthcare travel revenue of **30%** from 2023-2025 (2019 as baseline)



Strategies

Medical Excellence

Enhance medical excellence through global recognition, process, technological, and talent improvement

Service Excellence

Continuous improvement in end-to-end patient experience

International Branding

Raise global profile through evidence-based capabilities and extensive patient outreach



Outcomes

Recognised for medical excellence to attract high value patients

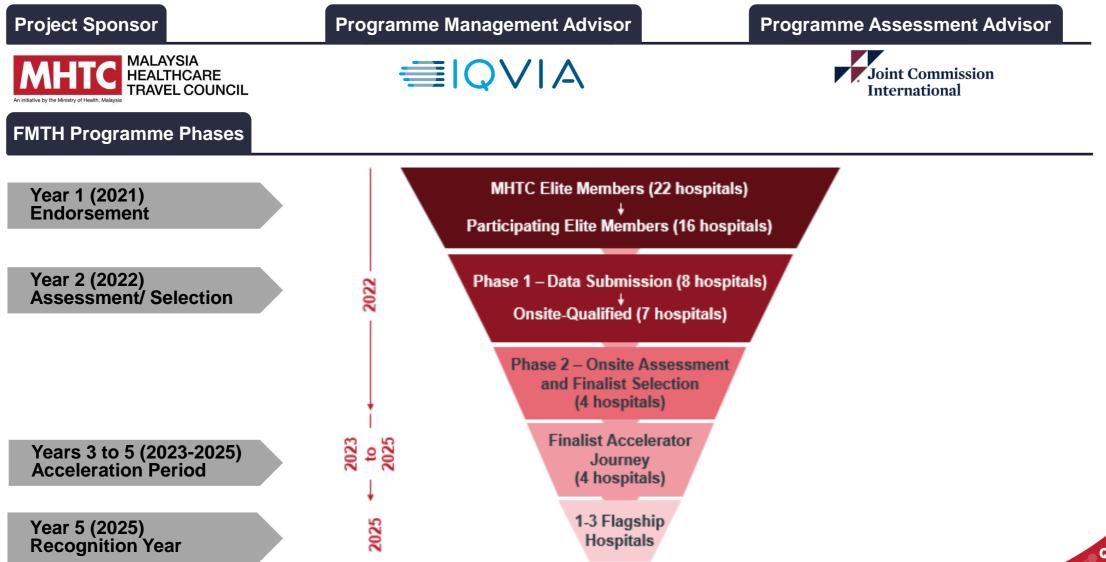
Differentiated service excellence and sustained service culture

Enhanced global profile and recognition

Source: MHTC, 2023

The overall assessment and selection of the Programme is carried out by Malousia independent & specialised Programme Advisories across a 5-year period

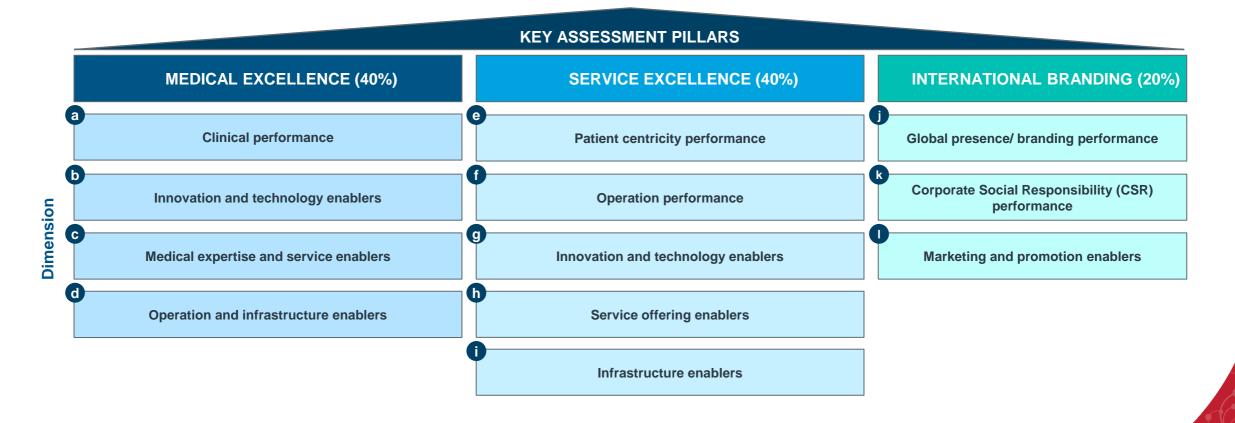




Assessment and scoring of participating hospitals were conducted based healthcare on a list of key pillars and dimensions



Data-driven methodology covering 51 metrics, divided into subcategories within the dimensions under the three (3) key programme pillars:



Phases of assessments undertook data-driven methodologies across the Malausia three (3) key programme pillars



LEADERSHIP INTERVIEWS





Engagement with the senior management (e.g., CEO, COO, CFO) of hospitals

STAFF INTERVIEWS





Interviews with the ground staff at key Healthcare Traveller (HT) touchpoints (e.g., Specialist Outpatient Clinic, Pharmacy, Radiology, Inpatient, etc.)

HEALTHCARE TRAVELLER (HT) JOURNEY INTERVIEWS









Healthcare Traveller (HT) Journey Interviews were conducted with staffs and HT to understand the HT's experience and overall satisfaction across the key touch points of hospitals

Announcement of the four (4) Flagship finalists was made by the Minister Malausia of Health, Malaysia in March 2023











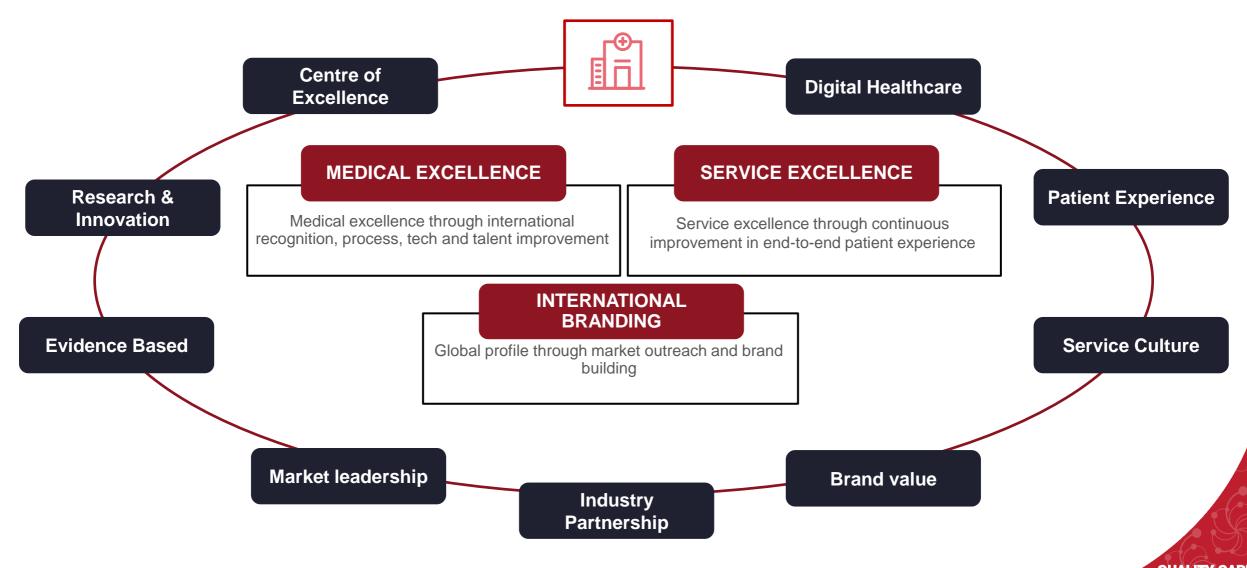


Note: The Flagship finalists' line-up are in alphabetical order.



The 2023 - 2025 Acceleration Phase: Multiple components of focus areas Phealthcare factored in to drive the transformation forward





The four (4) Flagship finalists are granted with Programme enablers and partnership collaboration, in support of the Acceleration phase



1

Investment Tax Allowance (ITA)

 Additional Investment Tax Allowance (ITA) on qualifying capital expenditure incurred between 2023 to 2025







MALAYSIA

Fast Track Facilitation

 Expedited approval to support development milestones as per the acceleration journey









3

Healthcare Technology Sandbox

 Finalists to be granted flexibility of testing concepts (digital and health innovation) that support medical & service excellence or improve patient experience in a sandbox











4

Programme Mentors / Advisors

 Finalists will get access to program advisors that will assist with programme development, assessment and KPI monitoring





5

Industry Partners

 Finalists to have the opportunities collaborating with the regional and international key players in further developing the industry ecosystem









and more...

2023 – 2025 Acceleration phase: Charting customised programme for Malausia finalists with KPIs focused on the programme three (3) key pillars



MEDICAL EXCELLENCE

- International certification and recognition of CoEs
- HIMSS stage module
- Clinical outcome benchmarking from CoE
- Non-CoE clinical outcome-based benchmarking
- Published article in leading international medical journals

SERVICE **EXCELLENCE**

- New industry strategic partnerships / collaborations
- Percentage of Net Promoter Score (NPS)
- New digitalisation in the healthcare traveller journey

INTERNATIONAL **BRANDING**

- Awards and recognitions
- Market expansion and diversification
- CSR international awards
- ESG international awards

CONTRIBUTION TO MALAYSIA'S HEALTHCARE TRAVEL INDUSTRY:

- Direct investments in healthcare travel industry of RM 250 million (US\$53.1 million) and above per hospital from 2019-2025
- Increase healthcare traveller revenue of **30%** from 2023-2025 (2019 as baseline)



2023 – 2025 Acceleration phase: Key initiatives in 2023



MEDICAL EXCELLENCE



Joint Commission International

Healthcare Information and

Management Systems Society

(HIMSS)



IQVIA, Powering Healthcare with Connected Intelligence



IQVIA, Powering Healthcare with Connected Intelligence

SERVICE EXCELLENCE



Bumrungrad International Hospital Bangkok



IQVIA, Powering Healthcare with Connected Intelligence



Naluri, Digital Healthcare Provider



Bumrungrad International Hospital Phuket (Upcoming)

INTERNATIONAL BRANDING



Malaysia Airlines



Shopee Malaysia



Procter & Gamble Health



IQVIA, Powering Healthcare with Connected Intelligence (Upcoming)

Speakers' line-up from Middle East, Australia, Thailand, Singapore and Malaysia

2023 – 2025 Acceleration phase: Key outcomes achieved from the four (4) finalists throughout the period of April – September in 2023



MEDICAL EXCELLENCE

Centres of Excellence (CoE)

- Mahkota Medical Centre: Clinical Care Programme Certification (CCPC) for Breast Cancer from Joint Commission International (JCI)
- Subang Jaya Medical Centre: Centre of Excellence Certification for Oncology from the Australian Council on Healthcare Standards (ACHS)

Medical Publications

 More than cumulative of 30 publications on international platforms

SERVICE EXCELLENCE

Industry Partnerships

 At least 10 new industry partnerships ranging from the industry of banking, insurance, travel agency, hotels, public relations & media

Digitalisation of Processes

 Development of healthcare digitalisation across the end-to-end patient touchpoints

Patient Experience

 Significant improvement on the Net Promoter Score, average above 20% improvement from the respective baselines.

INTERNATIONAL BRANDING

Brand profiling of the programme finalists via global platforms

 International media interviews and profiling – total PR value of almost RM 70 million (US\$ 14.87 million)

Global Healthcare Awards *(non-exhaustive)

- Island Hospital and Subang Jaya Medical Centre: Newsweek Best Specialised Hospitals APAC 2023
- Mahkota Medical Centre: Global Health Asia Pacific Awards 2023
- National Heart Institute: Healthcare Asia Awards 2023

*Investment achieved as of July 2023 at 38% of total healthcare investment of RM1.68 billion (~USD35.7 M) (committed from 2019 – 2025)



This innovative and game-changing Programme brings long-term benefits Malausia to the development of Malaysia's healthcare industry and the nation







Multiplying growth of the travel and tourism industry by fourfold



Strong global brand of Malaysia Healthcare through Flagship Medical Tourism Hospital and the Flagship finalists



Job creation, employment opportunities for local, tax generation and fiscal impacts from hospital construction and expansion.



Increase of domestic and foreign direct investment



Impact on the township/ district

End Goal: Establish and garner international recognition for Malaysia's Melauricare Flagship Medical Tourism Hospitals in 2025



FLAGSHIP FINALISTS









Subang Jaya **Medical Centre**

FINAL ASSESSMENT IN 2025





A National Recognition of the winner(s) by the **Honourable Prime** Minister of Malaysia as MALAYSIA'S FLAGSHIP **MEDICAL TOURISM HOSPITAL(S)**



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