

ERIA Discussion Paper Series**No. 392****Domestic Tourism as a Pathway to Revive the Tourism Industry
and Business Post the COVID-19 Pandemic***Jennifer CHAN[†]*Borneo Tourism Research Centre**Faculty of Business, Economics and Accountancy, Universiti Malaysia Sabah*

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Abstract: *This research aims to explore the potential of domestic tourism as a means to revitalise the tourism industry from the perspectives of local residents and tourism players. A quantitative online survey focused on domestic travel behaviour, motivation, places of interest, travel preferences, and willingness to travel within Malaysia; it was answered by 219 Malaysians. Interview data were collected using structured, open-ended interview questions through emails to eight respondents from tourism associations, five from the hotel sector, and two from the travel and tour sector. Data collection was carried out from 10 January to 15 February 2021. The findings reveal that domestic tourism has the potential to revive the tourism industry. A high percentage of respondents indicated the desire to travel domestically and being motivated by attractive tour packages at discounted prices. COVID-19 has impacted tourist behaviour and attitudes towards travelling, and people prefer to travel domestically rather than overseas. Furthermore, tourism players acknowledged the potential to revive the tourism industry and business via domestic tourism. Despite this, declarations of health, safety issues, flight availability, travel restrictions, and quarantine durations are key barriers to stimulating domestic tourism and rebuilding the tourism industry.*

Keywords: Domestic tourism; COVID-19 pandemic; Revitalise tourism industry

JEL Classification: L890

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1. Introduction

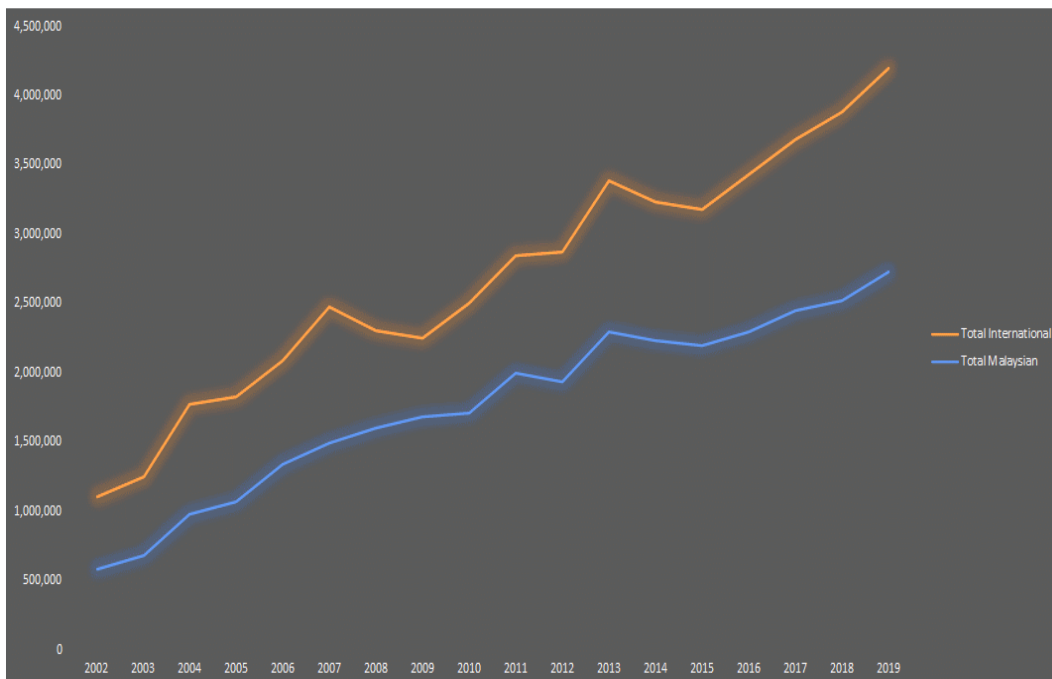
The outbreak of the coronavirus disease of 2019 (COVID-19) has had several profound negative impacts on the global economy, society, and the tourism and hospitality industry since March 2020. Countries and regions have attempted to contain the virus through social distancing, entry and travel bans, quarantines, and movement control orders (BBC News, 2020). Consequently, this has restricted mobility and created feelings of danger, fear of contagion/health issues, and an unwillingness to travel amongst tourists and travellers. Tours and travels have since decreased by 80%–90% in global tourism cities (UNWTO, 2020a). According to a report from the United Nations World Tourism Organisation (UNWTO, 2020b), between January and March 2020, travel restrictions were imposed for all worldwide destinations.

In 2019, Association of Southeast Asian Nations (ASEAN) countries accounted for 70.1% of all travellers, with East Asia adding another 6% (Tourism Malaysia, 2019). Asia-Pacific has been one of the hardest-hit areas by COVID-19, and the tourism economy in the region has come to a complete halt. In 2019, there were over 360.1 million international tourist arrivals to Asia-Pacific, an increase of 3.6% from 2018. The tourism industry employs over 182.2 million people and accounts for 5.5% growth in the region. In 2018, Malaysia had the 9th highest international tourism receipts in Asia-Pacific. Thus, the tourism industry is the backbone of the economy of many countries in the area. Further, it is of particular importance to the economies in Southeast Asia as it facilitates regional cooperation and promotes cultural and environmental heritage and diversity. However, it is one of the industries most affected by the COVID-19 outbreak. The pandemic has already had and will continue to have an enormously disruptive effect on the global economy in terms of growth and employment. It has created critical scenarios, namely, uncertainties, crises, and resilience; each scenario has had various negative impacts, essential measures, and changes of different magnitudes in the economy and business sectors. Thus, a new business landscape and normality are inevitable. According to the World Travel and Tourism Council (WTTC, 2020), the tourism industry is likely to recover more slowly than other sectors of the economy, as it took more than 19 months to recover in the case of previous pandemics.

The tourism industry is the third-largest contributor to Malaysia’s gross domestic product (GDP) at 15.9%, amounting to RM220.4 billion (Department of Statistics Malaysia, 2020). Tourist expenditure in 2018 was RM84.1 billion, a 2.4% increase from 2017, which amounted to 13.3% of GDP. Employment in the industry also reached 2.217 million, or 14.7% of the working population. International visitors accounted for 25.8 million, and the top 10 sources were all Asian countries—Singapore, Indonesia, China, Thailand, Brunei Darussalam, the Republic of Korea (henceforth, Korea), India, the Philippines, Japan, and Taiwan.

Tourism in Sabah provides more than 80,000 jobs, constituting the third-largest economic sector after oil and gas production and agriculture. The top 10 countries in terms of visitation (2013–2020) are China, Korea, Indonesia, Brunei, Taiwan, the Philippines, the United Kingdom (UK) and Ireland, Japan, Australia, and Singapore (Sabah Tourism Board, 2020). There was a rapid growth in the arrival of tourists from 2002 to 2019, and domestic tourism was greater than international tourism, as shown in Figure 1.

Figure 1. Sabah Tourist Arrivals (Domestic and International), 2002–2019



Source: Sabah Tourism Board (2020).

Since 18 March 2020, of all industries, the tourism industry in Malaysia has been the hardest hit by the measures to contain the spread of COVID-19. The ongoing Visit Malaysia Year 2020 (VMY 2020) campaign target to achieve 30 million arrivals was cancelled (MSN, 2020). The Sabah State Government has implemented an entry ban on foreign travellers since 8 February 2020. As a result of travel restrictions and lockdowns, global tourism, including to Malaysia, has slowed down significantly. Tourism receipts in Sabah declined by 61.5% from January to May 2020. Hotel occupancy rates dropped down below 30% due to the suspension of 236 international weekly flights, with 41,000 seats to Sabah. Overall, domestic tourist arrivals declined by 58.2% and international ones by 70.2% with 176,014 visitors, as compared to the same period in 2019 (589,850 visitors). A significant decline in travel has led to multiplier effects on key tourism business sectors and also changes in society and community life. Those most affected by COVID-19 include hoteliers, food and beverage establishments, and travel agencies (Malay Mail, 2020).

The continuing outbreak of COVID-19 cases and the implementation of different phases of movement control orders (travel bans/restrictions, social distancing, and quarantines) inhibit international and domestic tourism. It is expected that Malaysia's tourism sector may take 4 years to fully recover (Yunus, 2020). According to the Malaysian Association of Tours and Travel Agents (MATTA, 2020), the COVID-19 pandemic has greatly affected the tourism industry, with an estimated total loss exceeding RM100 billion in 2020. The Movement Control Order (MCO) in Malaysia has brought travel and tourism businesses to almost a complete halt. Questions have been raised with regard to the sustainability of tourism business operations and practices, leading to the rethinking and revisiting of business operation models of tourist destinations within such fragile and uncertain economic environments. The emergence of more inclusive business models that address tourism business sustainability and resilience is essential. A study by KPMG Malaysia (2020) suggests that the 'new normal' business environment will be a shift towards more localisation, digitalisation, and a greater use of technology, labour replacement and cost-cutting, more efficient data management, and an emphasis on finance and supply chain resilience. These may have significant impacts on the tourism industry and business operations.

Given the uncertainties surrounding the future course of the COVID-19 pandemic and its socio-economic, political, and health-related consequences, it is difficult to make predictions about the future of the Southeast Asian tourism industry without any empirical evidence or deeper insights from the travellers' and industry players' perspectives. Essentially, there is a need to know more about the changes in travel behaviour and preferences, as well as relevant strategies and measures to revive the tourism industry from the tourism players post-pandemic. UNWTO (2020a) reported the potential of domestic tourism as a sound and practical approach to help the country's economy recover by reviving the tourism business. However, domestic travel behaviour and relevant strategies need to be properly understood as domestic and international tourism are different. It is challenging to predict domestic tourist demand because preferences can be economic but may also be altered by psychological factors in relation to COVID-19 infection risks during a trip. Furthermore, it is uncertain how and to what extent domestic tourism can be an effective approach towards reviving the industry. Therefore, COVID-19 has changed tourism trends, with issues such as hygiene, safety, and security becoming major considerations for travellers. Accordingly, the demand for tourism products and services will be different, and tourists' behaviour and preferences will alter. Hence, this paper aims to fill these gaps within 'the new normal' from the consumers' and industry players' perspectives and subsequently proposes a new business model.

Key research question: In what ways can the tourism industry in Malaysia be revitalised post-COVID-19?

Research sub-questions:

1. What are the relevant measures to revive the tourism industry in Malaysia?
2. What are the business strategies to overcome the negative impacts of COVID-19?
3. What motivates people to travel domestically during the pandemic?
4. To what extent can domestic tourism be used as an alternative strategy to revitalise the tourism industry?
5. What is the tourism business model in the new business landscape?

2. Reviving the Tourism Industry and Business Post the COVID-19 Pandemic and Domestic Tourism

Tourism is an important economic activity in many countries as a tool for development and generating economic benefits (Gursoy and Chi, 2020). The recovery of the tourism industry has hence been a prevalent topic since the emergence of the COVID-19 pandemic, which has affected the industry significantly (Permal and Jamal, 2020) through external and internal travel bans and border closures (Karabulut et al., 2020; Sonmez et al., 2020). Thus, many countries that depend on the tourism industry have shifted focus to domestic tourism to restart it. The UNWTO (2020a) report acknowledges the potential of domestic tourism as an alternative for revitalising the tourism industry. It showcases that the major domestic tourism markets in the world are India, China, the United States (US), Japan, Brazil, France, Spain, Russia, Korea, Germany, Indonesia, Thailand, the UK, Australia, Malaysia, and Mexico. Domestic tourism has the highest number of tourist arrivals and receipts in most countries and greater flexibility in terms of access and transportation, along with fewer restrictions. In 2018, there were an estimated 9 billion domestic tourist trips (overnight visitors) and an overflow of 50% domestic tourism in Asia and the Pacific, that is, more than six times greater than international tourism (1.4 billion international arrivals in 2018) in terms of the number of trips.

Hence, domestic tourism has been recognised as the main source and the way forward for the industry to recover quickly in Malaysia. Domestic tourists comprise locals travelling within their own country for leisure, visiting friends and relatives, or exploring the country's attractions. Essentially, there are differences in travel behaviour, including motivation and decision-making, between domestic and international tourism. Such differences are crucial for tourism suppliers/operators and destination marketing organisations to revive the industry during the pandemic.

In an attempt to revive the tourism industry, the Malaysian Ministry of Tourism has focused on domestic tourism and marketing the country as a safe holiday destination (The Star, 2020), and Cuti-Cuti Malaysia has been launched as a domestic tourism campaign. Various incentives and discounts on domestic tourism have been introduced to encourage people to explore their own country.

According to state records of domestic tourist arrivals in Malaysia in 2019, Selangor was the most popular state amongst domestic travellers with 33.6 million tourists, followed by Kuala Lumpur (22.6 million), Sabah (22 million), Perak (21.1 million), and Sarawak (19.8 million), as reported by Wan (2020). A domestic tourism survey by Tourism Malaysia post-MCO reveals that 84% of people stated that COVID-19 has changed their travelling habits, and 71.3% indicated a preference to travel within Malaysia with the main purpose being visiting families and relatives. Department of Statistics Malaysia (2019) recorded double-digit growth in domestic tourism expenditure for the fourth consecutive year from 2016 to 2019. This is attributed to an increase in expenditure by tourists and day-trippers, who spend a total of RM67.9 billion and RM35.3 billion, respectively. Therefore, domestic tourism can be used as an alternative to drive the economy and improve tourism business performance (Yusof, 2020). Presumably, it will pick up faster and generate a higher revenue than international tourism.

2.1 Domestic travel behaviour and business models

Understanding travel behaviour is crucial in marketing and stimulating travel demand. It is expected that travel behaviour before and during the COVID-19 pandemic will be different (Abdullah et al., 2020). Furthermore, different countries have adopted varying degrees of restrictions to prevent and control the spread of the virus. These can affect people's lifestyles, social interactions, and economic conditions. In particular, travel-related and outdoor activities can be significantly affected (De Haas, Faber, and Hamersma, 2020; Mogaji, 2020).

During the pandemic, the Malaysian government suggested several initiatives targeted at promoting domestic travel and restoring confidence in the tourism sector. These include financial incentives, marketing and promotion, product development, partnerships, market intelligence, and capacity building and training. However, a more holistic and sound approach for assessing the potential of domestic tourism is necessary, especially information about tourists' behaviour and preferences, along with the extent to which domestic tourism can revive the industry. Previous studies have shown that factors affecting travel behaviour during the pandemic include fear of infection and perceived risk (Hotle, Murray-Tuite, and Singh, 2020), priority given to safety and security at a location, cleanliness,

infection concerns, social distancing, crowding, online pre-paid systems, and door-to-door services. Nevertheless, the implementation of travel restrictions, movement control orders, quarantine procedures, and standards of operating procedures of different countries may significantly affect travel motivations and choices. All these factors will influence domestic travel demand and the revival of tourism during the pandemic.

A survey on domestic tourism by Tourism Malaysia (September–October 2020) showed that 75.2% of people would prefer to travel domestically in the near future using their own arrangements; further, they have no specific preference regarding the days for travelling. The domestic tourism statistics data of the survey (September 2020) showed that Pahang, Melaka, and Kuala Lumpur were the three top states for domestic arrivals; Sabah was ranked second-last after Sarawak in terms of domestic leisure travelling (Daily Express, 2021) due to limited air connectivity and logistical issues associated with being located on an island. Generally, domestic tourism is extensively affected by a multitude of factors, such as disposable income, cost, competition, marketing and promotion, pricing, government regulations, and tax policy. Therefore, industry players and operators need to ensure that their operations and marketing efforts are agile and customer-centric.

Similarly, the outbreak of COVID-19 has created a ‘new normal’ in terms of tourism business operations and the economic landscape that involves consumer behaviour and business operations extensively. In this context, a new business model is fundamental to assisting tourism suppliers by adjusting business competitiveness in response to consumer needs and wants (Andrianto, Koseoglu, and King, 2021), and leveraging relevant strategies and entrepreneurship approaches (Lecocq, Demil, and Ventura, 2010) in an attempt to revive the tourism industry (Reinhold, Zach, and Krizaj, 2017). A business model evolves to adapt to emerging consumer markets, changing values, and technological advances, resulting in an exploration of new ways to revive the industry. It is a multifaceted conceptual representation with relevant attributes to provide an inclusive description of how a network, community, organisation, or actor creates and sustainably captures value from its activities (Casadesus-Masanell and Heilborn,

2015). Accordingly, integrating sustainability and innovation (Scheepens, Vogtländer, and Brezet, 2016; Andrianto, Koseoglu, and King, 2021), management practices (Sarkar and Sinha, 2015) and information and communication technology (Kshetri, 2007) can enhance existing operations in a business model. In this regard, a comprehensive model that takes into account relevant measures, changes, and strategies is necessary to revive the tourism industry during the pandemic.

3. Research Method

The study adopted both quantitative and qualitative data collection, which was carried out in two phases. The first phase, comprising online survey questionnaires, was used to collect data from local travellers from 7 January to 15 February 2021. A five-point Likert scale was used for the measurement of the data: 1 = strongly disagree, 2 = disagree, 3 = neutral, 4 = agree, and 5 = strongly agree. The data were analysed using descriptive statistics of the percentages and mean scores. A mean score of between 1 and 2 was rated 'low'; 3, 'average'; and between 4–5, 'high'.

Due to the extension of the MCO in Malaysia, face-to-face interviews were not possible for the second phase of data collection. Hence, it was carried out via email, wherein the key tourism players listed and registered with the Sabah Tourism Board were asked open-ended questions. The interview data consisted of relevant measures and business strategies, changes, and business models to revive the tourism industry through domestic tourism. A total of 15 respondents, consisting of eight presidents of district tourism associations, five managers from the hotel sector, and two managers from tour and travel companies, answered the questions. The data analysis was conceptually driven, based on thematic analysis.

4. Findings and Discussions

4.1 Profiles of the online survey respondents

A total of 250 online survey questionnaires were distributed amongst Malaysians. However, only 219 people responded. Out of these responses, 27 questionnaires were not usable as they were incomplete. Thus, the number of

questionnaires considered in this study is 192. The demographic profiles of the online survey respondents are presented in Table 1 below. Females accounted for 64.84% and males consisted of 35.16%. In terms of age, 63.47% were aged 20–39 years, 35.16% were aged 40–59 years, and 0.46% were more than 60 years old. With regards to ethnicity, a majority of the respondents were Bumiputera (64.38%), followed by Malay (25.57%), Chinese (8.68%), and Indian (1.37%). In terms of academic qualification, a majority of the respondents possessed a bachelor’s degree (55.25%), followed by those who held a master’s degree (12.79%), Malaysia Higher School Certificate or college diploma (19.18%), and Malaysia Higher School Certificate or lower (12.79%).

Table 1: Profiles of Online Survey Respondents

Demographic Variable	Categories	Frequency	Percentage
Age	Below 20	3	0.91
	20–39	121	63.47
	40–59	67	35.16
	Above 60	1	0.46
Gender	Female	67	36
	Male	125	64
Race	Malay	49	25.57
	Chinese	16	8.68
	Indian	4	1.37
	Others	123	64.38
	(Kadazan/Dusun)		
Education Level	STPM/College	37	19.18
	diploma	107	55.25
	Bachelor’s degree	24	12.79
	Master’s degree	24	12.79
	Doctoral degree		

Source: Online survey responses.

4.2 Profiles of tourism industry player respondents

Table 2 presents the demographic profiles of tourism industry players who responded to the online interview. Males accounted for 66.60% and females for 33.40%. About 33.30% were aged between 20–39 years, 53.30% were between 40–59 years, and 13.40% were more than 60 years old. With regards to ethnicity, a majority of the respondents were Bumiputera (60.0%), followed by Malay (13.50%), and Chinese (26.50%). Most of the respondents possessed a bachelor’s degree (26.70%), followed by those who held a master’s degree (20.00%), STPM or a college diploma (26.70%), and SPM or lower (20.60%).

Table 2: Profile of Tourism Supplier/Operator Respondents

Demographic Variable	Categories	Frequency	Percentage
Age	20–39	5	33.30
	40–59	8	53.30
	Above 60	2	13.40
Gender	Female	10	66.60
	Male	5	33.40
Race	Malay	2	13.50
	Chinese	4	26.50
	Others	9	60.00
	(Kadazan/Dusun)		
Education Level	STPM/College	4	26.70
	diploma	3	20.00
	Bachelor’s degree	4	26.70
	Master’s degree	4	26.60
	Doctoral degree		
Categories	Tourism association	8	53.30
	Hoteliers	5	33.30
	Tour operators	2	13.40

Source: Online survey responses.

4.3 Travel behaviour

Table 3 reports the mean scores of the five components of the travel motivations. The results show that the respondents were most motivated to travel for holidays (4.36), followed by price/promotion (4.34), to escape from a hectic life (4.30), visiting friends/relatives (3.39), and business and leisure (3.71). The following components are internal factors of motivation: holidays, escape from a hectic life, visiting friends/relatives, and business and leisure. On the other hand, price promotion is an external factor. Despite the MCO implemented as a preventive measure in response to the COVID-19 pandemic, the findings show that there is a strong force of Malaysians who desire to escape from their hectic lives, visit friends/relatives, and have holidays; this has been attributed to the implementation and extension of the MCO period that has affected people's mental and psychological wellbeing. With the limited mobility, closed borders, and a chain of roadblocks and checkpoints, some respondents admitted to experiencing heightened temperaments and irritability at home. Boredom and a lack of outdoor activities also affected them psychologically, mentally, and physically. Further, strain due to family separation, as some members were stuck in another state due to the closing of borders, affected people as well. Hence, having a holiday or escaping from one's hectic life became ways to relax. Due to international travel bans for leisure since March 2020, people took the opportunity to travel domestically in June 2020 when travel restrictions were lifted within the country.

Table 3: Domestic Travel Motivations

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total	Weighted Score
Holidays	0	3	20	74	95	192	4.36
Price Promotion	0	3	23	71	95	192	4.34
Escape from a Hectic Life	3	7	20	61	101	192	4.30
Business and Leisure	3	11	66	70	42	192	3.71
Visiting Friends and Relatives	4	20	86	62	20	192	3.39

Source: Online survey responses.

Price promotion has the second-highest score, which indicates that respondents were motivated to travel due to price promotion. Unlike international tourists, domestic tourists are very price sensitive. With the absence of international travellers, domestic ones have become the main target group. Many hotels and tourism destinations have started to introduce special promotions and attractive prices to boost domestic tourism.

In addition, the responses from the tourism industry players show that factors such as accessibility, good infrastructure and transportation, and a safe and hygienic environment are key motivators for domestic travel. This is evident from the following responses:

‘Accessibility to destinations is important for domestic tourism’ (TA2).

‘Tourism operators and the government need to provide good infrastructure and transportation’ (TA4).

‘All land transport companies, airlines, and ferry terminals were temporarily closed’ (TA6).

‘...providing sufficient domestic connecting flights and hotels with attractive and reasonable fare’ (TA7).

‘Hygiene and safety became the main concerns for domestic travellers’ (HO1).

‘Travellers demand that tourism operators provide a safe and hygienic environment’ (HO2).

In terms of the types of attractions to visit, heritage and purpose-built attractions had higher weighted scores compared to natural/wildlife attractions and events. The data are shown in Table 4.

Table 4: Preferences for Types of Attractions to Visit

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total	Weighted Score
Heritage Attractions	0	2	32	90	68	192	4.17
Purpose-built Attractions (theme parks)	0	4	34	92	62	192	4.10
Natural and Wildlife Attractions	2	6	44	80	60	192	3.99
Event Attractions	7	34	68	57	26	192	3.32

Source: Online survey responses.

Thus, heritage attractions, such as heritage centres, places of worship, and historical sites, and purpose-built attractions, such as man-made theme parks, water parks, and wildlife centres, attract many domestic travellers. Natural and wildlife tourism has the third-highest mean score, 3.99. Malaysia is famous for its different ethnicities, which are represented in the country’s unique architecture, handicrafts, traditional attire, music, and dance, reflecting a colourful heritage and an amalgamated culture. Therefore, heritage tourism remains the key attraction for Malaysians. Further, cultural heritage tourism has emerged as a potential form of alternative tourism amongst domestic travellers.

Table 5 shows that a majority of the respondents intended to travel domestically after more than 1 year after the MCO, with the highest mean score of 3.46, followed by 6 months to 1 year (3.39), and 2–6 months (3.26). This indicates

that the confidence of travellers is still very low, and restoring it requires more time despite the health protocols implemented by the government for safe travel.

Table 5: Timeframe for Travel Plans within Malaysia

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total	Weighted Score
More Than 1 Year	24	16	44	67	41	192	3.44
6 Months to 1 Year	19	17	61	62	33	192	3.38
2–6 Months	16	29	57	69	21	192	3.26
Within 2 Weeks to 1 Month	16	45	76	37	18	192	2.98
Anytime during the MCO	75	48	38	21	10	192	2.18

Source: Online survey responses.

The results of the online survey, highlighted in Table 6, show that Sabah is still the favourite destination amongst Malaysians, with the highest mean score of 4.47. West Malaysia is the second-favourite destination (3.79), followed by Sarawak (3.60), and Labuan (3.19). Sabah remains the favourite destination due to its beautiful nature, which provides a perfect place to escape from one’s hectic life, work, and urban city life. Indeed, Malaysians are becoming more attracted to nature and wildlife and are seeking interesting experiences to share with their children. Besides, with the government slowly easing the movement restrictions of the lockdown to allow inter-district travelling, many people want to be outside, be healthier, and reconnect with nature; Sabah offers opportunities for this.

Table 6: Preferences for Domestic Travel Destinations within Malaysia

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total	Weighted Score
Sabah	1	1	14	67	109	192	4.47
Sarawak	9	15	62	65	41	192	3.59
West Malaysia	17	19	65	69	21	191	3.29
Labuan	13	24	99	38	18	192	3.13

Source: Online survey responses.

Table 7 presents the factors influencing the attractiveness of destinations within Malaysia. These factors are related to nature, food, value for money, ease of access, islands and beaches, and ecotourism. These components reflect Malaysia's identity as a tourist destination. Domestic tourists opt for nature-based destinations to avoid travelling to crowded places, to have space for social distancing, and to have the opportunity to be close to nature. Furthermore, there are many nature-based destinations that locals have not been visiting. Correspondingly, Malaysia is recognised for its variety of local and ethnic food, which acts as an attraction factor.

Table 7: Factors Influencing Destination Attractiveness

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total	Weighted Score
Nature	0	2	27	70	93	192	4.32
Food Heaven	0	3	29	67	93	192	4.30
Value for Money	2	3	28	65	94	192	4.28
Ease of Access	0	3	32	76	81	192	4.22
Island and Beaches	1	7	35	55	94	192	4.22
Ecotourism	0	3	40	72	77	192	4.16
Multicultural	0	8	56	70	58	192	3.93
Muslim-friendly	9	8	55	70	50	192	3.75

Source: Online survey responses.

The results related to barriers to travel reveal that a declaration of health along with health and safety concerns are the main reasons that a majority of the respondents (92%) do not intend to travel within the MCO period. Passengers are required to declare their health condition at state borders or entry points, which is the key barrier for travellers, with the highest mean score of 4.32.

Furthermore, many people feel the importance of reducing movement and adhering to the rules and procedures to contain the outbreak. Simply, travelling increases the chance of getting and spreading COVID-19, especially at airports, bus stations, train stations, and rest stops, where travellers can be exposed to the virus. Moreover, social distancing may be difficult to implement in some public places. People are also not confident about the hygiene and sanitation processes undertaken in public and tourism areas. This finding is consistent with a study by Abdullah et al. (2020). Clearly, during the pandemic, people prioritise hygiene and safety in deciding to travel domestically.

Other barriers to travelling domestically are related to flight availability and government restrictions on travelling—all interstate air passengers need to have a negative COVID-19 test result with a 3-day validity period before they board a flight. The impact of all these barriers is shown in Table 8 below.

Table 8: Barriers to Travelling within Malaysia

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Total	Weighted Score
Health Declaration	0	5	23	69	95	192	4.32
Hygiene and Safety	0	4	29	60	99	192	4.32
Flight Availability	4	0	37	69	82	192	4.17
Government Restrictions	1	5	40	73	73	192	4.10

Source: Online survey responses.

4.4 Stimulating domestic tourism

A total of 75% of respondents agreed that tourism operators need to provide attractive promotions in order to improve and revive domestic tourism. Tourism packages with great value and getaway plans, such as good hospitality and food at a great place to visit, will be the push factor for effective marketing strategies. Price promotions and attractive discounts on tour packages are effective ways to stimulate travel demand during the pandemic. At the same time, the operators need to maintain the originality of the tourism destination and provide services that meet the needs of customers. Similarly, government intervention is crucial to promote domestic tourism widely and frequently on social media, which can be a great platform to share the latest promotions and marketing with viral effects and minimum costs. Apart from these, the transportation system, roads, tourist sites, cleanliness of destinations, and safety must be maintained well.

As pointed out by respondents, ‘future domestic travellers will eventually opt for safety and hygienic products’ (TA7) when deciding their post-pandemic travelling intentions. This is supported by other qualitative responses: ‘Safety and hygiene have become key factors for selecting destinations and tourism activities...’ (TA2), and ‘avoiding big gatherings’ (TA3).

It is equally important to recognise the emergence of new niches and market segments and have a greater focus on safety protocols and contactless tourism experiences. Safety and hygiene have become key factors in selecting destinations and tourism activities. Travellers will avoid visiting crowded places. Digitalisation is key in tourism services and ‘is expected to continue to accelerate’ (TA2); this includes greater use of automation, contactless payments and services, virtual experiences, and real-time information provisions. This is further made evident by the following responses:

‘Higher use of automation and systems’ (TA4).

‘Contactless payments and services, virtual experiences, real-time information provision...’ (HO1).

‘Providing digital grants for tourism players’ (HO3).

Government intervention is crucial for providing digital grants to tourism industry players for transforming their core business activities towards further digitalisation of the industry. More importantly, tourism policy will need to be more reactive and flexible regarding bookings and cancellations. The tourism operators must be able to adapt quickly to policy changes. Crisis management will be a particular area of focus. Due to the pandemic, government directives are dynamic and keep changing overnight. Therefore, operators and suppliers need to be prepared for these dynamic changes and adhere to the latest government directives. Besides this, the government must implement Health and Safety Accreditation at tourism destinations in order to boost travellers' confidence. Frequent enforcement needs to be carried out so that the public is secure and confident about the measures implemented by the government. For instance, MATTA has worked towards this objective with an internationally accredited company to implement a proper 'MATTA Travel Safe Mark', with support and endorsement from the Ministry of Tourism, Arts, and Culture.

4.5 Potential of domestic tourism to revive the tourism industry

Travelling has always been an integral part of society and the way of life of many locals in Malaysia. The results of the travel motivations and plans indicate the desire and preference for travelling domestically. Based on the responses, there is still demand from locals who want to enjoy, relax, and release their tension after months of lockdown at home. The prolonged MCO period has forced the public to stay indoors, which has affected their mental health, in particular making them feel uneasy and stressed in confined spaces; others seek to escape from their hectic lives. Likewise, a study by Kourgiantakis, Apostolakis, and Dimou (2020) indicates positive travel intentions for domestic tourism during the pandemic. The survey and responses of the tourism industry players seem to conclude that domestic tourism will act as an alternative for reviving the tourism industry as long as the country's borders remain closed for international tourism. The recovery period of this pandemic is predicted to be approximately 4 years. Hence, tourism operators need to adhere to the new norms and explore alternative strategies to revitalise the tourism industry. The findings of the study show that a majority of the respondents agreed and responded positively to rebuilding and revitalising the tourism industry

through domestic tourism. It offers opportunities for locals to explore their own country and for tourism operators to generate and sustain their businesses. It can be used as an alternative for driving the economy and improving tourism business performance (Yusof, 2020).

A majority of the tourism industry players agree and acknowledge that domestic tourism is the prime measure to revitalise the tourism industry in Malaysia; this is made evident by the following responses:

‘People prefer to stay local and visit destinations within their own country’ (TA1).

‘Malaysia’s borders are still closed, so locals still rely on domestic tourism as an alternative’ (TA3).

‘Locals are looking for alternative ways to release stress’ (TA4).

‘Families are looking for alternatives to escaping from their hectic lives’ (TA8).

‘Domestic tourism is the solution’ (HO3).

‘With support and spending by local people, domestic tourism will eventually improve...’ (HO4).

Therefore, domestic tourism is deemed an alternative approach to revive the tourism industry. First, tourism operators recognise that locals are keen to visit destinations within their own country and feel safer to travel. Malaysia is blessed with a unique landscape and a wide range of beautiful nature and cultural attractions. This result corresponds with a survey on domestic tourism by Tourism Malaysia (2020), which showed that 75.2% of people stated their intention to travel domestically in the near future. The local market has always been a key source of domestic tourism, especially over weekends and school holidays. With the ongoing COVID-19 pandemic, tourism operators can leverage the domestic tourism market and provide travellers with a wide variety of locally-based holiday experiences or ‘staycation’ packages. Second, international tourism remains uncertain as it is likely going to take a long time to reopen international borders, and the effectiveness of vaccination remains questionable. Thus, with government intervention and stakeholder collaboration, domestic tourism is the means to rebuild the tourism industry.

Although domestic tourism may offer quick recovery to the industry, it has also been severely impacted by COVID-19 outbreak containment measures. It, hence, requires relevant stimulus packages from the government, efforts to lift travel restrictions, and working with businesses to apply the new health protocols, along with price sensitivity. Many tourism suppliers need to be equipped with the knowledge and skills to manage crises and be resilient in the face of this new phenomenon; moreover, a strong focus on safety and hygiene standards is vital to building customer confidence. Likewise, different approaches in terms of domestic tourism product development and packaging, pricing and marketing strategies, as well as behavioural changes and travel trends within tourism, need to be considered. Hence, other than the staycation promotions mentioned above, hotels across Malaysia also have dining offers and additional loyalty perks like upgrades and complimentary parking. Many respondents also indicated that shifting the target market to local customers and reducing prices are vital for rebuilding and stimulating domestic tourism.

Furthermore, hygiene and safety readiness for local tourism destinations remains critical to attracting domestic travellers. The survey results revealed that health and safety is one of the main barriers to travelling; the need to enhance travellers' confidence in health and safety was pointed out by the industry players.

Indeed, respondents showed a lack of confidence in the current Standard of Operating Procedure (SOP) practices of tourism operators. For instance, they were doubtful about the safety of the destinations. Even though there may be an SOP in place, unfortunately not everyone adheres to it.

The findings of the study showcase that travelling domestically became unattractive due to four main factors: products, accessibility, promotions, and health and hygiene. Furthermore, the stringent requirement of swab tests imposed by the state also contributed to a decrease in locals travelling from West Malaysia to Sabah and Sarawak, and vice versa. The cost of swab testing is more expensive than that of the flight tickets offered by the airlines. In addition, the reduced frequency of flights and the closing of certain flight sectors also affected domestic tourist arrivals. Other factors include unattractive tourism destinations and standards of services that are unable to meet travellers' needs. Most of the

customers would like to experience and discover new and attractive places equipped with basic facilities, such as electricity, an internet connection, and water, in new destinations that provide unique and learning experiences.

Accessibility is one of the factors that makes a destination unattractive. During the conditional movement control order (CMCO) periods, most of the domestic flights were cancelled and flight availability was limited. Furthermore, the prices of flight tickets were extremely high due to fewer people travelling. In addition, most of the hotels were temporarily closed due to high operation and maintenance costs.

Apart from this, a lack of promotion also makes travelling unattractive to the locals. A majority of people are unaware of the attractive offers provided by tourism operators. One of the main reasons is that government directives are dynamic and keep changing almost every week when special announcements are made regarding the current condition of the pandemic and COVID-19 cases. Thus, tourism operators are unable to cope with these frequent changes and announcements.

4.6 Measures and strategies to revive the tourism industry

The findings of this study reveal various measures and strategies to rebuild the tourism industry. These are related to marketing, health and hygiene issues, rules and regulations regarding travel restrictions, and government measures to support and empower the community, as is demonstrated by the responses reported in Table 9.

Table 9: Responses Regarding Measures to Rebuild the Tourism Industry

<p>‘Effective marketing strategies, advertising, and promotional campaigns’ (TA1).</p> <p>‘Promote domestic tourism and highlight tourism products and services’ (TO1).</p> <p>‘Provide attractive promotion to boost the domestic tourism industry’ (TO2).</p> <p>‘Promote and showcase our natural attractions like islands, beaches, highlands, or forests’ (TA8).</p> <p>‘Continuously promote our wide variety of locally based holiday experiences’ (HO1).</p> <p>‘MATTA to create a platform for members to promote their products and services’ (H05).</p> <p>‘Attractive prices for locals’ (HO4).</p> <p>‘Health and hygiene conditions – clients demand to feel secure’ (TA1).</p> <p>‘Screening facilities, sanitisation at destination...’ (TO2).</p> <p>‘Restoring tourist confidence by enhancing destination safety and hygiene’ (TA5).</p> <p>‘Safety measures and facilities at their premises and destinations...’ (TA6).</p> <p>‘Safety for tourism and adherence with government Standard Operating Procedures (SOP)’ (TA8).</p> <p>‘Follow government SOP, social distancing at hotels and resorts’ (H03).</p> <p>‘Removed travel restriction to allow locals to travel between districts’ (TA 2).</p> <p>‘Government to open borders so that Malaysians can travel freely to West Malaysia, Sabah, and Sarawak...’ (TA4).</p> <p>‘To allow inter-district travelling, and the government to reduce restrictions for locals to travel domestically’ (TA5).</p>	<p>Marketing and Promotion</p> <p>Pricing</p> <p>Health and Hygiene Condition</p> <p>Tourist Confidence SOP</p> <p>Remove Travel Restrictions and Swab Testing</p> <p>Cost of Swab Tests</p> <p>Financial Assistance – Soft Loans</p>
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<p>‘Allow inter-district and state travelling and remove swab testing’ (TO2).</p> <p>‘Removed restrictions on swab test requirements, cost of swab test is expensive compare to flight ticket rate’ (H04).</p> <p>‘Provide soft loans to travel agents and special grants’ (TA1).</p> <p>‘Provide loans for those who are affected by the pandemic’ (TA3).</p> <p>‘Government to assist on providing funds for those who want to make investments in the tourism industry despite the COVID-19 pandemic’ (TA8).</p> <p>‘Special grants/funds for hotels to cope in this hard time’ (HO7).</p> <p>‘Government to provide loans for hoteliers who lose their jobs during the pandemic to start small businesses’ (TO1).</p> <p>‘Empowering communities for domestic tourism...’ (TA2).</p> <p>‘Tourism that is sustainable and empowering for communities and emphasises the sustainable environment, especially for Sabah...’ (TA7).</p> <p>‘Assist and empower communities to develop their tourism destinations’ (TA8).</p> <p>‘Develop and empower communities to promote their products and services’ (HO1).</p> <p>‘Government to allow communities to promote destinations freely and remove restrictions and red tape’ (HO2).</p> <p>‘Government to empower communities and listen to their voices’ (TO1).</p>	<p>Empowering Communities</p>
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Source: Online interviews.

The responses reveal several key measures for rebuilding the tourism industry. These include the identification of a wide range of domestic tourism products and services to attract and stimulate domestic travel demand, such as natural attractions like islands, beaches, highlands, or forests. Continuous updates and providing attractive promotions to boost the tourism industry are crucial steps as well. Besides these, restoring tourist confidence by enhancing destination safety

and hygiene initiatives is one of the key measures to revitalise the industry. In view of the current pandemic, provisions for relevant safety measures and facilities at tourism premises and destinations, along with adhering to government SOP, are essential measures. Facilities for health screening, sanitisation, and social distancing must be provided by tourism operators, Along with this, they must continuously create awareness and educate the public that it is safe to travel to Malaysia after vaccination. Other measures include removing interstate and inter-district travel restrictions for Sabah, and providing soft loans to travel agents and special grants to those who want to invest in the tourism industry despite the COVID-19 pandemic. Empowering communities involved in domestic tourism and emphasising sustainability and responsible practices are pertinent to rebuilding the domestic tourism industry, especially in Sabah. This is because the tourism industry in Sabah is largely attributed to community-based tourism and nature-based attractions. Furthermore, empowering communities to explore and providing better destination offers to improve the experience of travellers are necessary. For instance, communities should be empowered to continuously build good relationships with their respective stakeholders and understand travellers' needs to tailor-make unique product for them. For example, hiking and cycling are currently the latest trends in domestic tourism in demand by locals. Understanding travellers' needs will eventually support the initiative of revitalising Malaysia's tourism industry.

Furthermore, provisions of financial assistance in the form of soft loans, grants, and tourism tax-relief for travel and tourism businesses are vital. The travel restriction imposed by the government during the MCO period, which started on 18 May 2020 as a measure to contain the spread of COVID-19, adversely affected the tourism industry. A significant number of tourism businesses were unable to operate and companies had to wind up their businesses. Many respondents expressed the need for continuous support of the government in providing incentives, tourism tax relief, grants, and soft loans, as well as establishing stronger governance and compliance laws to support the rebuilding of the tourism industry. In particular, this involves collaboration between the ministries of health and tourism to establish and refine the SOP for the tourism industry.

The results show that the respondents considered marketing and promotion as key strategies for rebuilding the tourism industry. The continuing pandemic, closure of international borders, and travel bans have prevented international tourism. The Ministry of Tourism, Arts, and Culture has hence focused on domestic tourism and making the country a safe holiday destination. Thus, domestic tourism is deemed to be an alternative strategy to rebuild the tourism industry. Industry players have shifted their marketing and promotion activities towards domestic tourism. Attractive prices and nature-based attractions are vital in domestic tourism as it is different from international tourism. Likewise, improving health and safety conditions and tourist confidence are essential during the pandemic, along with lifting travel restrictions, adhering to the SOP, and reducing swab test costs. A significant number of respondents agreed that strategies to lift travel restrictions in phases and normalise tourism business operations are essential to curbing the negative impacts of the pandemic on tourism. Using these strategies, tourism operators are able to operate their tour businesses and local residents are able to travel domestically. Also, it is vital for the government to gradually open international borders in phases for COVID-19 low-risk countries.

Therefore, government support in the form of financial assistance, including soft loans and empowering the community, is a key strategy for rebuilding the tourism industry. The extended movement control orders and continuous travel bans for leisure activities resulted in no tourists, and tour operators being unable to survive due to financial problems. Tourism suppliers are of the view that providing soft loans to tourism operators is crucial for retaining and restarting tourism businesses. It is noted that financial assistance in the form of one-off payments is insufficient for tourism operators to revive their businesses.

4.7 A tourism business model in the new business landscape

The COVID-19 pandemic has shaped the business landscape and affected the economy significantly; subsequently, a ‘new normal’ has emerged, and changes are inevitable. A majority of the respondents recognised the need for a new business model as the outbreak of COVID-19 has altered existing business operations and the landscape of the economy. This is further supported by KPMG Malaysia (2020), which states that the ‘new normal’ business environment will be a shift towards

more localisation, digitalisation and greater use of technology, labour replacement and cost-cutting, more efficient data management, and an emphasis on financial and supply chain resilience. The findings of this research reveal that business operations, in addressing the post-COVID-19 period, must emphasise the safety and hygiene of a destination and business premises. It is important that the public be well-informed about COVID-19, as they demand assurances and instructions on how and when to return safely to travelling. Therefore, tourism operators are encouraged to collaborate with the relevant government agencies to address safety and hygiene issues by understanding the current SOP and latest directives shared by the Ministry of Health on quarantine requirements, swab test procedures, and vaccine passes. Future tourism will foresee and expect health screenings just as we have security screenings in airports. Trusted and robust passenger information will be vital to helping ensure short-term traveller confidence and long-term public health. In other words, it is crucial that regulatory bodies and the travel industry work together to respond to this health crisis in the same way as they have to others: by gearing towards safety with prudent risk mitigation techniques.

In addition, the pandemic has restricted tourist interactions as individuals prefer to have fewer interactions with each other. The findings suggest that tourism operators should invest in and explore digitalised bookings and payment transactions so that tourists feel secure in performing transactions and minimise their risk of exposure to COVID-19. The respondents also suggested that tourism operators should leverage online promotions and capitalise on online platforms to promote their destinations, products, and services. Hence, the key elements, such as safety and health, collaboration and partnership efforts, digitalised communication and marketing, flexibility in bookings and cancellations, crisis management, and resilient strategies, encapsulate the new tourism business model. These have been highlighted through the respondents' comments, showcased in Table 10.

access are crucial for promoting domestic tourism between Sabah, Sarawak, and Peninsular Malaysia. Government financial assistance and stakeholder collaboration or partnerships to contain the virus and promote domestic tourism are essential. For tourism industry players, understanding the key changes in travel behaviour and developing new business models that address these in the ‘new normal’ landscape of tourism business are indispensable for long-term business sustainability. This research contributes to a deeper understanding of domestic tourism to rebuild the tourism industry. The findings serve as relevant guides to spearhead domestic tourism and implicate the planning, development, and sustainability of the tourism industry after the COVID-19 pandemic.

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