

MALAYSIA'S POST PANDEMIC TOURISM RECOVERY: GOVERNANCE, INNOVATION AND POLICY CHALLENGES

RECUPERAÇÃO DO TURISMO NA MALÁSIA APÓS A PANDEMIA: DESAFIOS DE GOVERNANÇA, INOVAÇÃO E POLÍTICAS

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Abstract

The COVID-19 pandemic has significantly disrupted Malaysia's tourism industry, as well as highlighted many vulnerabilities in its resilience and governance. While government interventions were mounted, undetermined challenges continued to be faced. While post-pandemic recovery has been one of the most commonly analyzed issues, the study of the operational and strategic obstacles faced by Malaysian tourism practitioners remains very limited. Using a summative content analysis of tourism reports and academic literature, supplemented by in-depth interviews, this study uncovers the strategic post-pandemic challenges in Malaysia's tourism and hospitality industry from the industry's perspective. Our findings offer

Resumo

A pandemia da COVID-19 afetou significativamente a indústria do turismo da Malásia, além de destacar muitas vulnerabilidades em sua resiliência e governança. Embora tenham sido realizadas intervenções governamentais, desafios indeterminados continuaram a ser enfrentados. Embora a recuperação pós-pandemia tenha sido uma das questões mais comumente analisadas, o estudo dos obstáculos operacionais e estratégicos enfrentados pelos profissionais do turismo da Malásia permanece muito limitado. Utilizando uma análise sumativa do conteúdo de relatórios turísticos e literatura acadêmica, complementada por entrevistas aprofundadas, este estudo revela os desafios estratégicos pós-



practical insights for policymakers and industry stakeholders in the development of effective policies, operational strategies, and travel packages that strengthen the 'Malaysia Truly Asia' image, enhance resilience, and ensure a sustained competitiveness again in this region.

Keywords: Post-pandemic. Tourism Malaysia. Key Challenges. Tourism and Hospitality Industry.

pandêmicos na indústria do turismo e da hotelaria da Malásia, da perspectiva da indústria. Nossas conclusões oferecem insights práticos para os formuladores de políticas e partes interessadas da indústria no desenvolvimento de políticas eficazes, estratégias operacionais e pacotes de viagem que fortaleçam a imagem da “Malásia, Verdadeiramente Ásia”, aumentem a resiliência e garantam uma competitividade sustentada novamente nesta região.

Palavras-chave: Pós-pandemia. Turismo na Malásia. Principais Desafios. Indústria do Turismo e da Hotelaria.

1 INTRODUCTION – MALAYSIA TOURISM AT PRE-AND POST-PANDEMIC

Malaysia was one of Asia's most preferred tourists' destinations, attracting more than 20 million tourist arrivals every year until the COVID-19 pandemic inflicted the world in 2019 (refer to Table 1). Since 2012, the annual Tourism Direct Gross Domestic Product (TDGDP) generated from the tourism sector (including inbound and domestic travel) in Malaysia has increased to RM54.87 billion and it has reached its peak in 2019 with RM102.27 billion (Statista, 2021). The increasing middle-income population in Asia that has demanding better quality of life, together with advanced infrastructure connectivity, cheaper travel options and marketing promotions have contributed towards tourists' arrivals in Malaysia. The employment rate in the tourism industry increased significantly from 2.9 million in 2015 to 3.6 million in 2019, an increase of 5.6% (Tourism Malaysia, 2022).

However, TDGDP, which was identified as one of the main indicators to gauge the sustainability of tourism in 2021, only achieved RM13.13 billion compared to RM28.44 billion in 2020. It tumbled 53.8 percent compared to a decrease of 72.2 percent in 2020 (The Star, 2022). To combat the surge in the COVID-19 cases, the Ministry of Tourism, Arts and Culture (MOTAC) had to cancel the Visit Malaysia Year 2020 (VMY2020) campaign. This situation has dampened the government's target to achieve 30 million arrivals during the campaign Visit Malaysia Year 2020.

Among the first countries to implement the Movement Control Order (MCO), which took effect on 18 March 2020 was Malaysia. Since then, different series of MCOs were carried out in Malaysia to tackle the surging cases of the pandemic. All the activities of the tourism sectors remained frozen or in very minimal operation during the period of MCO (Lam, Kozak & Ariffin, 2024). Most countries, including Malaysia had implemented some effective measures like quarantines, business closures, work-from-home programmes and social distancing to curb the spread of the pandemic. This lockdown has disrupted the mobility of tourists and travellers triggering fears of contagion and this situation has led to a general reluctance to travel in the future to come.

The “*Galakan Melancong Malaysia (GAMELAN)*” Fund and “*Geran Sokongan Pelancongan, Seni dan Budaya*” Fund (GSPSB 2021), are among the several stimulus packages introduced by the Ministry of Finance (which were channelled to MOTAC) to assist the tourism industry during these challenging times. In addition, the Sabah Tourist Association gave its members RM300 stimulus vouchers to support their tourism services, events, entrance fees, and product purchases from other members. On 10th May 2020, Sabah became the first state in Malaysia to permit internal travel (Rahim, 2020).

Table 1

The number of international tourist arrivals

Year	International Arrivals (million)	Receipts (RM billion)
2025	45.00 (expected)	125.50 (expected)
2024	37.90	106.80
2023	20.14	71.30
2022	10.07	28.23
2021	0.13	0.24
2020	4.33 (targeted 30 million)	12.7 (targeted 100 billion)
2019	26.10	86.1
2018	25.83	84.1
2017	25.95	82.1
2016	26.76	82.1
2015	25.72	69.1
2014	27.44	72.0
2013	25.72	69.1
2012	25.03	60.6

Source: Tourism Malaysia (2025)

While waiting for the return of foreign tourists, the government ventured into several ways to revive the tourism sector by focusing on domestic tourism. Langkawi was chosen by the federal government as the pioneer kick-start for the ‘Domestic Travel

Bubble'. The government opened the island for domestic travel on September 16, 2021, to promote tourism among Malaysians. As a result of this pilot project, it is surprising to note that Langkawi has received 720,000 local tourists, far more than the 200,000-target which was set earlier by MOTAC.

Besides Langkawi, foreigners from Singapore were permitted to travel in Malaysia by a Vaccinated Travel Lane (VTL). The Malaysian government started this movement on 29th November, 2021, and by the end of 2021, nearly 38,000 tourists entered Malaysia through VTL. The netizens praised the government for their efforts in undertaking proactive measures to revive the tourism industry. Without these measures, the entire industry will collapse, and it will take more than half a decade to resuscitate.

For the upkeep of 738 low-cost hotels that are registered with the ministry, MOTAC has set aside RM 30 million in matching funds. Then, registered homestay operators received an additional RM60 million in incentive funding for marketing campaigns and RM50 million in matching grants for planning arts and culture-related events. Furthermore, according to the government's 12th Malaysia Plan (2021–2025), by 2025, there will be about 24.3 million foreign visitors and expected RM 73 billion in travel revenue.

Over the past 2–3 years, Malaysia's tourism industry has endured unprecedented disruptions due to the COVID-19 pandemic. Despite various government initiatives—both financial and non-financial—aimed at accelerating recovery, the industry continues to face substantial challenges that remain unresolved. While there is a growing body of literature on post-pandemic tourism recovery, studies that systematically examine the specific challenges experienced by Malaysian tourism players remain limited (Lam, Choo, Gan & Sivakumar, 2025). Hampton, Jeyacheya, and Nair (2023) also suggest that *“more critical research is required on the role of inclusive growth in tourism's recovery from this crisis”* (p.4), specifically in the Malaysian context, given its status as a major tourism destination in Asia.

In particular, there is a lack of research capturing the perspectives of industry practitioners, whose insights are critical for understanding the practical, operational, and governance-related constraints affecting the sector (Khardani, Schmude & Namberger, 2024; Vlami, Tsamos & Mitropoulos, 2025). Addressing this gap, the present study seeks to investigate the strategic post-pandemic challenges in Malaysia's tourism industry from

the viewpoint of experienced practitioner. By linking policy interventions, governance mechanisms, and operational realities, this study aims to provide a comprehensive understanding of the obstacles to recovery and offer actionable insights for both policymakers and industry stakeholders.

During the past two to three years, the tourism industry in Malaysia has been experiencing an unprecedented level of disruptions due to the COVID-19 pandemic. Even with a series of financial and non-financial assistance initiatives being offered by the relevant governments, the industry is currently faced with a series of outstanding challenges. Even with the increased level of publication related to the recovery of the tourism industry post-pandemic, the existing empirical study related to the specific challenges being faced by the tourism industry players in Malaysia is currently restricted (Lam, Choo, Gan & Sivakumar, 2025). Moreover, Hampton, Jeyacheya, and Nair (2023) argue that an increased level of critical discussion is currently required concerning the specific contribution offered by inclusive growth in helping the tourism industry recover from the pandemic, especially given the increased level of importance of Malaysia among the top tourism destinations in Asia (Hampton et al., 2023, p. 4).

Firstly, a lack of literature with a focus on industry perspectives is noted, given the importance of these views for comprehending limitations in the industry in relation to a host of factors, including those associated with governance and other related considerations, from a post-pandemic outlook (Khardani et al., 2024; Vlami et al., 2025). With these considerations in mind, the purpose of the proposed research is thus aimed at shedding light on post-pandemic strategic industry challenges in the tourism industry in Malaysia from an industry perspective with industry expertise.

2 RESEARCH APPROACH

This study employed summative content analysis to examine the existing body of literature on post-pandemic developments within the hospitality and tourism sector. Academic journals in management, policy and governance, tourism, and hospitality constituted the core sample for analysis. Major scholarly databases, including Emerald, Taylor's & Francis, SAGE, and ScienceDirect, were systematically searched. Summative content analysis was deemed essential as it enabled the structured identification of

recurring themes, policy directions, governance issues, and recovery strategies relevant to the post-pandemic tourism landscape. This method is widely utilised in hospitality and tourism research (Adeyinka-Ojo, Lee, Abdullah & Teo, 2020), as it facilitates the synthesis of diverse sources and the tracing of conceptual patterns across academic, policy-based, and industry publications.

Searches were conducted using keywords such as ‘post-pandemic recovery in Malaysia’, ‘Malaysia’s tourism challenges’, and ‘Malaysia’s tourism policy’, across the selected databases, search engines, and Google Scholar. Complementary sources—including government reports (e.g., Tourism Malaysia 2025, Tourism National Policy 2020-2030, 12th Malaysia Plan or *RMK 12*) related to tourism policy and planning, as well as national news articles (e.g. The Star)—were also reviewed. Through this multi-source approach, the study constructed a comprehensive understanding of the structural and strategic issues shaping Malaysia’s tourism industry in the post-pandemic era, thereby ensuring alignment with established knowledge and contemporary scholarly discourse.

Nevertheless, literature alone could not sufficiently capture the nuanced, lived realities and operational complexities encountered within the industry. To address this gap, the study incorporated a semi-structured interview with an industry expert. A face-to-face interview was conducted with Miss L, a senior manager at a five-star hotel in Kuala Lumpur with over twenty years of industry experience. Her extensive professional background provided rich, contextualised insights that complemented and reinforced the themes identified through the content analysis. This practitioner-based perspective offered valuable observations on organisational responses, policy implementation, workforce challenges, and recovery trajectories—dimensions often underrepresented in published sources. The integration of both methods strengthened the study’s overall credibility by combining macro-level evidence from the literature with micro-level insights from an experienced industry practitioner.

3 FINDINGS- KEY CHALLENGES IN THE MALAYSIAN POST-PANDEMIC TOURISM INDUSTRY

3.1 Political stability, mandate and direction

In general, tourism is a fragile industry that is vulnerable to all kinds of external impacts, including political issues. Numerous examples were given to illustrate how a negative political atmosphere or controversial messages can lead to a decrease in tourist arrivals (either for domestic or international travel). Previously, political stability and safety were essential criteria for tourism. Civil unrest and terrorism are examples of threats that can influence tourists to reconsider their decision to visit their preferred places of destination. Negative perceptions may prolong for years, and this scenario can affect the country.

The manager interviewed has claimed that since Malaysia has gone for a recent general election, thus, much policy-making at the ministry or agency level needs to be halted until a new minister or head is sworn in. By then, the new minister will have different new policies. Another example would be in Kedah, where Kedah's PAS-led state government (which was a change from the Pakatan-led government in the mid-way) has suggested that the sale of alcohol would be controlled on the resort island of Langkawi, following its successful move to shut down gaming outlets in the state. But, due to the sale of alcohol on the island being under the jurisdiction of the Finance Ministry, the state government has no authority to interfere with the island's duty-free status. Thus, many international tourists especially from Western countries has selected the neighbouring country's world-class resort island such as Phuket and Bali as their ideal destination in Asia. Resorts in the beach area, especially the major hospitality brands, rely on the international market. Many investors planning to invest in Malaysia's tourism and hospitality industry, but are fearful of political uncertainties which could be a flip-flop in policy-making once a government changes.

Another very recent negative example would be a non-Muslim businesswoman who was slapped with a compound notice by the local authority in Kelantan for 'indecent' dressing despite being inside her own premises. MOTAC minister has seriously spoken

out and warned that tourism in Kelantan would be affected if local authorities continue to fine women for indecent dressing and this also creates a halo effect for Malaysia's tourism image.

Meanwhile, Saeed (2024) that Malaysia suffered a tremendous loss of more than RM1 billion in potential entertainment tourism receipts in 2023 due to the cancellation of concerts which was mainly influenced by stringent government rules and protest from religious parties. In 2023, a total of four concerts were cancelled. Two of the main concerts were turned down earlier in 2022. According to an industry expert, heightened political scrutiny of concerts, driven by opposition from Islamists who were against foreign performers in Malaysia in September 2023, led to the cancellation of Lauv's tour. Geoffrey Williams, an economics professor from the Malaysia University of Science and Technology estimated that the loss of revenue had exceeded RM1 billion. He attributed the issue to "onerous regulations", stating that the government creates risks and makes it more difficult for event organisers to put on shows.

Following Singapore's successful hosting of American pop sensation Taylor Swift earlier in March, as highlighted by a number of industry stakeholders, Malaysia needs a radical government mandate to be able to compete as a entertainment-based destination in the region. The event attracted thousands of admirers from all across the region and sold over 300,000 tickets. Many industry players and tourists had started to make a comparison between Malaysia with other Islamic countries like Saudi Arabia or Türkiye. The issue here is that these are advanced or developed countries with flourishing tourism that upholds the rights of people of other faiths. Why is Malaysia not following the same approach?

3.2 Tourism governance reforms and regulations

In the latest press release by the Malaysian Tourism Federation (MTF), its president Datuk Tan Kok Liang, has reaffirmed calls for comprehensive and quick changes to the antiquated Tourism Industry Act 1992 (Act 482), highlighting the pressing need to update Malaysia's travel laws. The industry has expressed concern that it could lose its competitive advantage and jeopardise the work of regional stakeholders who are working to maintain and expand this vital sector.

The Ministry of Tourism, Arts, and Culture (MOTAC) has made several promises to improve enforcement mechanisms, amend out-of-date legislation, and crack down on travel package frauds (such as dealing with unlicensed tour operators in Sabah's marine tourism hotspots). However, as stated by the industry participants, not much has changed in spite of these guarantees. The lack of clear action has irritated stakeholders more and more, leading them to doubt the government's sincerity and dedication to bringing about significant change.

According to the majority of recent news reports, the tourism industry need a regulatory framework that is flexible, progressive, and resistant to changing customer expectations, corporate practices, and technology disruptions. The current laws need to be completely revised because they are dreadfully insufficient to address these issues. Examples of regulatory reforms include regulating e-hailing services and providers of short-term rental accommodations (such as independent homestays) while imposing harsh fines on unregistered operators, including those who used unlicensed tour bus drivers (The Borneo Post, 2024).

Furthermore, it has been argued that the present Tourism Act's requirement that all tour buses have a licensed tour guide places needless restrictions on small domestic operators. Players in the tourism industry questioned the inconsistent legislation, asking why travelers' e-hailing MPVs or hire-and-drive vans are free from the requirement for licensed guides. Therefore, it is necessary to address such double standards. To guarantee a level playing field for all parties involved, rules and regulations must be realigned.

These uncontrolled operations damage respectable companies and diminish customer confidence in tourism service providers. Additionally, MTF called out antiquated laws that forbid people from owning shares in more than one travel agency irrational and ineffective. As harmful to local enterprises, MTF criticised the current policy that allows 100% foreign ownership of inbound travel agents with just RM1.5 million in paid-up capital. Due to the uneven playing field created by this legislation, Malaysian tourist businesses are marginalised while international companies have easy access to a low-capital business environment.

In order to help small travel agencies stay competitive in a market compared to competitive neighbouring countries with friendlier government policies (e.g., Thailand, Indonesia), the tourism industry's stakeholders request the ministry to improve tourism

company governance by promoting mergers, acquisitions, and resource-sharing programmes (e.g., tourist data analytics). The tourism ministry should, therefore erect more robust barriers to safeguard local companies and guarantee that they profit from the unhealthy competitions. The tourism sector can support local talent, encourage smaller enterprises, and preserve Malaysia's standing as a top travel destination without strangling advancement through undisguised old and mismatched regulations by modernising the tourism governance and act.

3.3 Lack of innovation or new product development

As also claimed in the 12th Malaysia Plan Mid-term Review analysis, the tourism industry is losing its competitiveness could be partly due to the lack of product development. According to the interviewee, tourism destination attractions are experiential types of products and services. If a tourist had travelled and experienced a destination's statue-type of monuments/ buildings (including museums), he or she will not be going back to the destination again.

A review of the National Tourism Policy 2020–2030 shows that our tourism industry is facing the following challenges:

- **Lack of creativity**- where existing tourism products are becoming unattractive due to a lack of creativity and innovation. After the pandemic, this is a challenge that requires immediate attention to maintain the competitiveness and sustainability of the tourism industry compared to our neighbouring countries like Thailand, Singapore and Indonesia. The key players are over-dependence on the government's aid. Then services in the tourism and hospitality facilities should be innovated. For example, Leesan (2022) claimed about the innovative standard operating procedures at Japan's Narita Airport. From the moment a tourist steps out of the aircraft, it only takes about 20 minutes before he/she can pick up the luggage, and be ready to leave the airport. This is because while he/she is still in the queue, the Japanese immigration officers will start to scan face and take fingerprint with a portable device, so that the tourist only needs to have the data verified at the counter to complete the immigration clearance procedures.

- **Poor destination and facilities management-** where some tourist destinations have led to unsustainable physical development and negative tourist experiences. Then, the financial constraints limit the maintenance of tourism infrastructure, which can affect the functionality of facilities and systems. The infrastructure component of tourist development is critical since it supports the destination's competitive advantage (Rahim, Bakar, Hashim, Nawi & Wee, 2022). Concrete evidence would be the Kuala Lumpur International Airport (KLIA I). Leesan (2022) argued that the automated people mover system (Aerotrain) service at the KLIA is still “under maintenance”. In fact, it seems like it is perpetually under maintenance for so many years, even before the pandemic era. Only in recent years, where the new Malaysia’s Transport Minister- Anthony Loke stated that it would be operational again by 31st January 2025. It is because, next year is an important year for the country because Malaysia will chair Asean, where many delegates will be coming over for international meetings (The Star, 2024).

Figure 1

Example of a dilapidated bridge at a tourism spot in Perhentian Island, Terengganu.



Source: Marzuki Mohammad’s Facebook

To target those excursionists and short-haul tourists to stay longer, Malaysia must offer authentic, innovative and tropical-type of adventure experiences to the tourists. The Government should offer more incentives and support to the micro, small and medium enterprises who are keen to venture into those innovative tourism products and services. For example, Tegallalang Rice Terraces in Bali, Indonesia not only welcomes tourists to visit its hill-planted paddy field, but it also offers various adventurous and experiential activities (e.g. hill cycling, field trekking, air-swing, air-cycling) to the tourists including having different kinds of cafes just for relaxing and enjoying the natural breeze. Additionally, tourists have not been drawn to appreciate Malaysian culture by the present tourism packages, which do not fully positioning on local culture, arts, and historical elements.

3.4 Lack of Malaysia tourism identity and brand positioning image

Previously, before the pandemic time, Tourism Malaysia actively promoted Malaysia's tourism identity as one of the finest and most inclusive in the region. The promotional tagline – **Malaysia Truly Asia** was continuously and massively promoted on various platforms and channels.

However, as claimed by the expert, after Covid-19, this authentic and only mojo that represents Malaysia's tourism destination image is hardly seen and heard even on traditional and mainstream channels like TV 1, TV 2 and TV 3. This could be due to the fact that Malaysia had gone through different political turmoil over the past few years until the 15th general election. Most of the TV advertising information only focused on how the government of the day had done for the country's economy, on Covid information but none (or limited) on tourism advertising although the country officially opened the border in April 2022. Additionally, the digital platforms' promotional efforts have not been adequately utilised to reach the appropriate tourist segments. Surprisingly, it is asserted that traditional forms of advertising, such as billboards and print media, are still extensively employed despite their inefficiency in converting travel intentions into actual visits.

Figure 2

Example of Malaysia Truly Asia short videos broadcasted by Tourism Malaysia in recent time



Source: Youtube (2024)

4 Limitations and Conclusion

This study is subject to several limitations that warrant careful consideration. First, the qualitative design—based on a limited sample consisting of a single interview and supported primarily by secondary sources—constrains the generalisability of the findings. Nonetheless, the study adopts an exploratory stance that provides a valuable foundation for stimulating further empirical inquiry. To more rigorously assess the pandemic’s impact on the tourism industry and to capture comprehensive insights from industry stakeholders, future research should employ robust empirical designs. Subsequent studies may operationalise the identified challenges as measurable variables and examine their interrelationships with other constructs (e.g., tourism sustainability) to enrich the theoretical discourse.

Moreover, although prior research has explored COVID-19's influence on tourist behaviour, the broader and practical magnitude of the pandemic on the tourism industry remains insufficiently examined. This underscores the need for developing validated measurement tools to evaluate pandemic-induced effects and associated shifts in tourism resilience. Additionally, scholars are encouraged to extend this study by investigating sector-specific challenges—such as those faced by homestay operators, marine park managers, theme park providers, heritage site managers (e.g., museums) (Lam, Khan, Aziz & Ahmat, 2024), and tour operators—to attain a more nuanced understanding of the vulnerabilities across the diverse segments of Malaysia's tourism and hospitality industry.

Reflecting the urgent concerns and candid 'voices' expressed by industry practitioners, this study provides critical insights that can assist the tourism ministry and relevant authorities in recognising the explicit and often under-acknowledged challenges confronting the sector in the post-pandemic era. By presenting evidence-based assessments from the reliable source and feedback from the industrial player, the study enables policymakers to formulate timely, targeted, and contextually appropriate legislative and strategic responses to strengthen industry recovery and resilience. Furthermore, the findings offer practical implications for travel agencies, enabling them to design more responsive and competitive tourism packages and products. Such enhancements can play a significant role in elevating Malaysia's Truly Asia destination image, reinforcing market confidence, and sustaining the nation's overall tourism competitiveness in this region as compared to Singapore, Thailand and Indonesia.

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