



SURVEY ON DOMESTIC TRAVEL IN MALAYSIA

**AFTER MOVEMENT CONTROL ORDER (M.C.O)
7th – 13th APRIL 2020**

OVERVIEW

The outbreak of Covid-19 has indeed affected all walks of life. Businesses paralyzed, economies collapsed, travel was limited. Furthermore, to contain the outbreak, most countries including Malaysia have imposed travel restrictions, with the latter introduced Movement Control Order (MCO) for 14 days effectively from 18th March 2020 and subsequently was extended till 28th April 2020.

The MCO has put all businesses in the country to almost complete halt. In fact, of all industries, tourism was the most badly hit. It is estimated that tourism industry will stand to lose RM19.2 billion in tourist receipts over the period of 3 months from March till May 2020.

To ensure the survivability of the tourism industry post MCO, it is imperative that proper strategies are in place. One of the strategies is to focus domestic market for quick conversions.

Hence, in order to assess the **Domestic Travel Demand Post MCO**, Tourism Malaysia has conducted an online survey from **07th April till 13th April 2020**. Succinctly, the survey is aimed to assess **Domestic Travelers** on the following aspects:

- i) Their willingness to travel for leisure post MCO;
- ii) Their travel preferences post MCO; and
- iii) Their perception on leisure travel post MCO.

Tourism Malaysia hopes the findings will enable industry players and other related stakeholders to envision the demand of domestic travelers post MCO and identify suitable and effective strategies to revive their businesses and travel industry as a whole.

MAIN FINDINGS

A total of 13,797 respondents had participated in the survey. From that total, 34.3% respondents were 31 to 40 years old, 27.5% were 41 to 50 years old, 18.2% were 22 to 30 years old, 13.1% were 51 to 60 years old, 3.8% were 18 to 21 years old and 3.1% were 61 years and above. Among the main findings from the survey are:

- i. 45.0% are seasonal travelers and 18.5% are frequent travelers;
- ii. A majority of respondents or 88.4% prefer to arrange their travel independently than tour packages. From that total (independent arrangement), 98.8% of them opt to purchase their holiday via Online Booking Sites [multiple response];
- iii. The rest of respondents or 11.6% prefer to travel with tour packages. From that total (tour packages), 54.1% of them opt to purchase their tour packages from Tour Agency and 34.3% from Online Tour Agency (OTA) [multiple response];
- iv. 32.1% of the respondents intend to travel domestically within 1 month after MCO window; and
- v. Most respondents or 63.9% intend to travel domestically with their families and relatives, while 31.4% intend to travel with friends and business associates [multiple response].

In terms of perception on travel domestically post MCO, the responds from the respondents are as follows:

- i. Majority of respondents believe that Covid-19 has impacted their attitude towards traveling;
- ii. Majority of respondents prefer to travel domestically than overseas;
- iii. Majority of respondents have low confidence in using land public transportation, airlines, homestays and AirBnB;
- iv. Majority of respondents are more confident in using own transportation and hotels / resorts;
- v. Almost all respondents opt hygiene and safety as the main priority in deciding to travel;
- vi. Majority of respondents also prioritize pricing and product attractiveness in deciding to travel;
- vii. Majority of respondents will strongly avoid traveling at crowded areas;
- viii. Majority of respondents will avoid traveling for shopping and theme park activities; and
- ix. Almost equal of agreement / disagreement among the respondents on traveling for F&B, sports and recreation activities.

CONCLUSION

Due to the unprecedented effects and by virtue of the magnitude caused by the Covid-19 pandemic particularly on tourism sector, domestic market has been identified as the “key” for the industry to recover immediately.

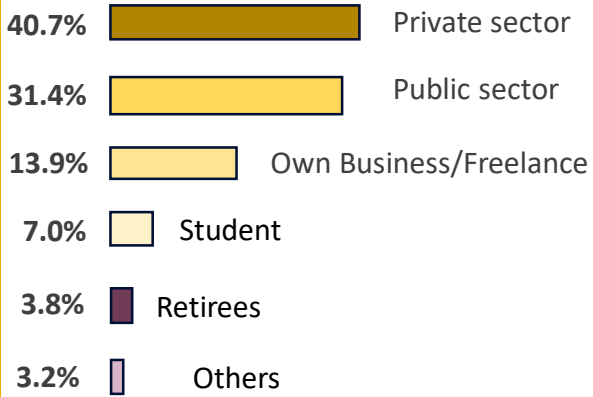
It is interesting to note that traveling has always been an integral part in society and the way of life. The eagerness of domestic travelers to plan and the level of confidence in terms of health and safety in Malaysia after MCO indicate optimism of recovery, albeit “new norms” in travel habit.

These clearly show that the years of relentless efforts in promoting domestic tourism are bearing the fruits. Cuti-Cuti Malaysia will always be in the hearts of all Malaysians.

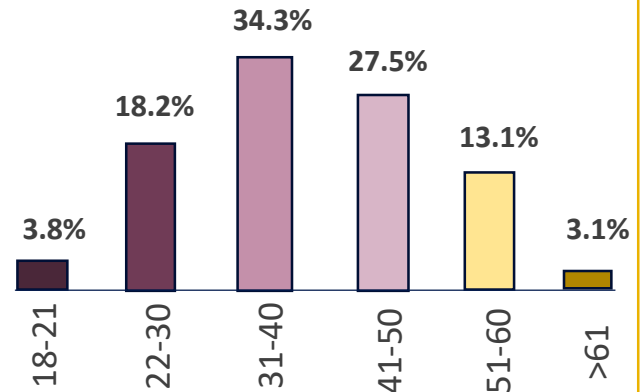
SECTION A:

DEMOGRAPHIC

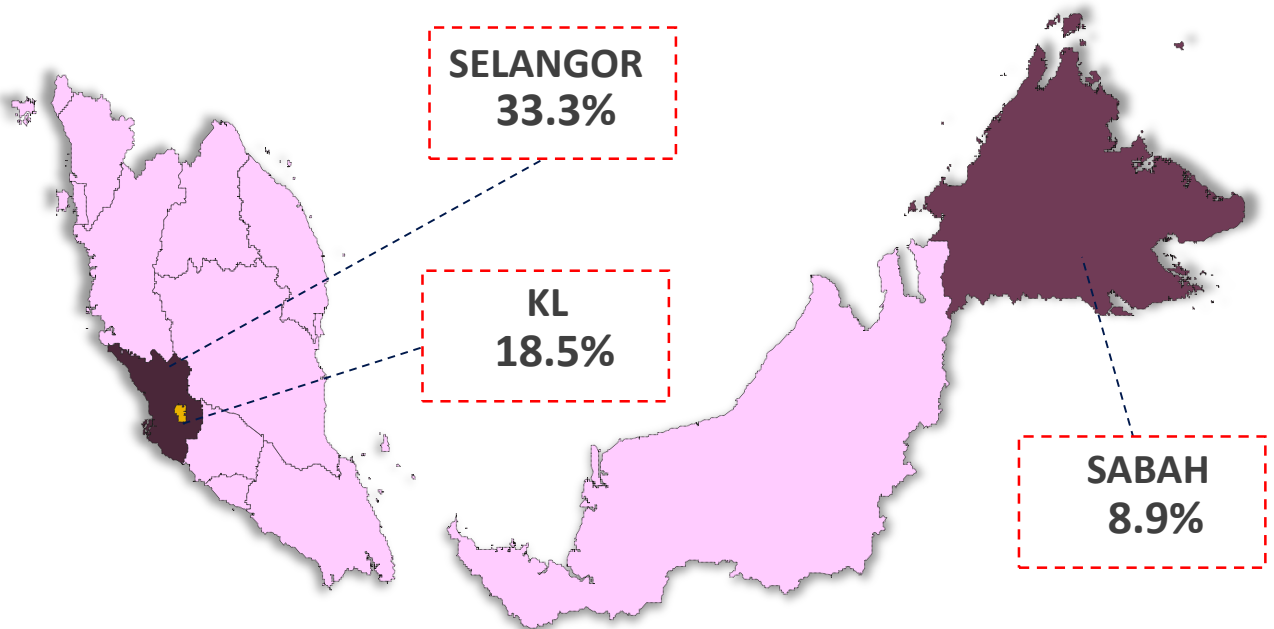
A1) OCCUPATION :



A2) AGE GROUP :



A3) LOCATION :



| Johor | Putrajaya | Perak | Penang | Kedah | Negeri Sembilan | Sarawak | Melaka | Pahang | Kelantan | Terengganu | Perlis | Labuan |
|-------|-----------|-------|--------|-------|-----------------|---------|--------|--------|----------|------------|--------|--------|
| 7.5% | 5.7% | 4.1% | 3.6% | 3.2% | 3.2% | 2.7% | 2.5% | 2.3% | 1.8% | 1.7% | 0.5% | 0.5% |

(Single response)

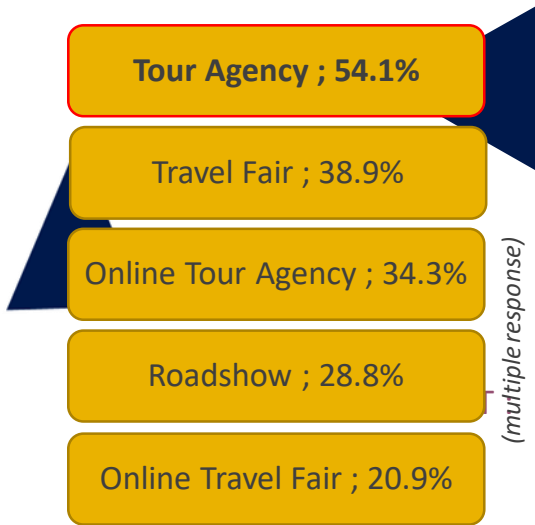
SECTION B:

TRAVELLING BEHAVIOUR

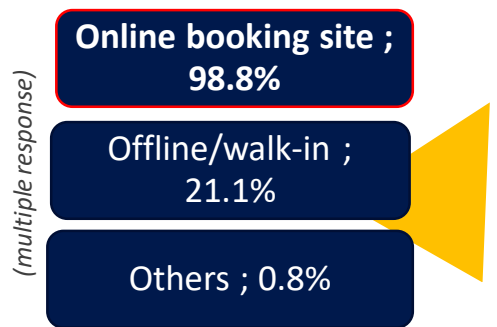
B1) TRAVEL ARRANGEMENTS



B2) PREFERRED BOOKING PLATFORMS



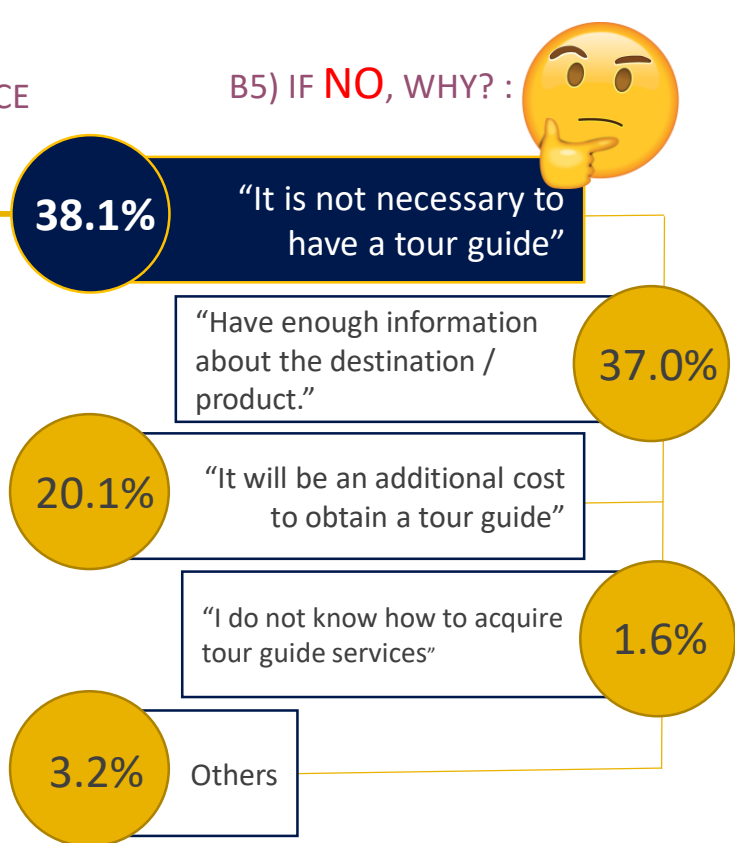
B3) PREFERRED BOOKING PLATFORMS



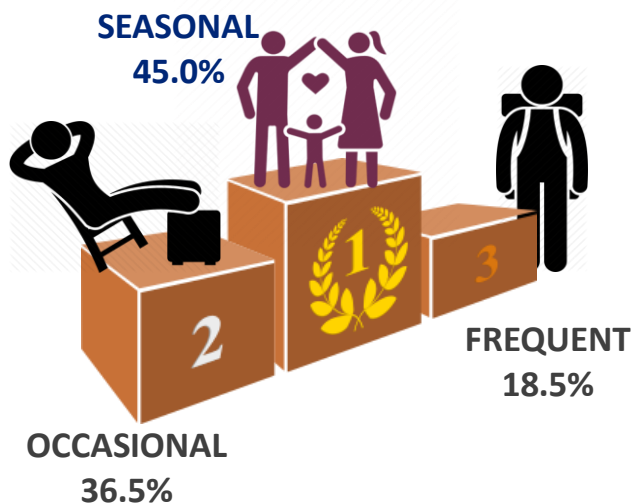
B4) ARE YOU PREFER TOUR GUIDE SERVICE WHILE TRAVELLING IN MALAYSIA? :



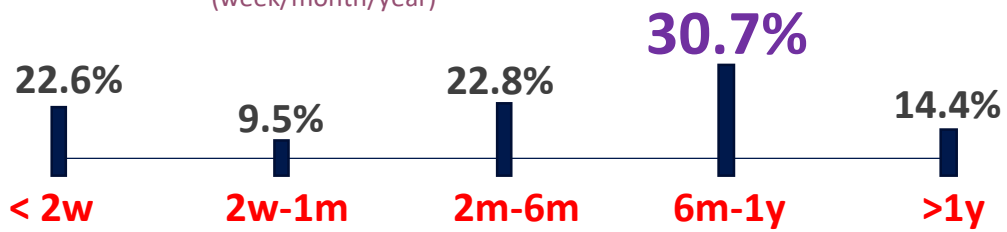
B5) IF NO, WHY? :



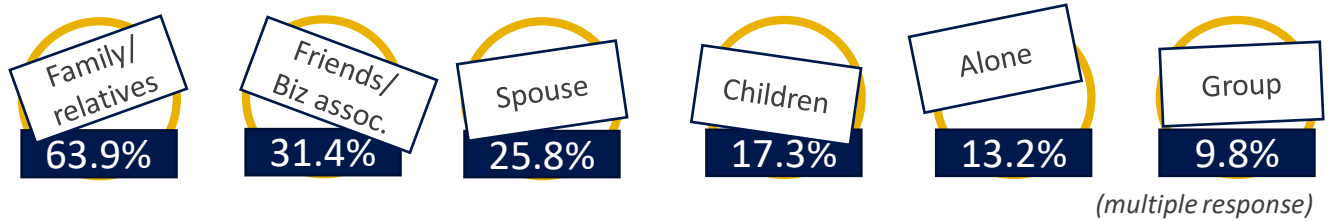
B6) TRAVEL FREQUENCY :



B7) AFTER MCO, I INTEND TO TRAVEL WITHIN :
(week/month/year)

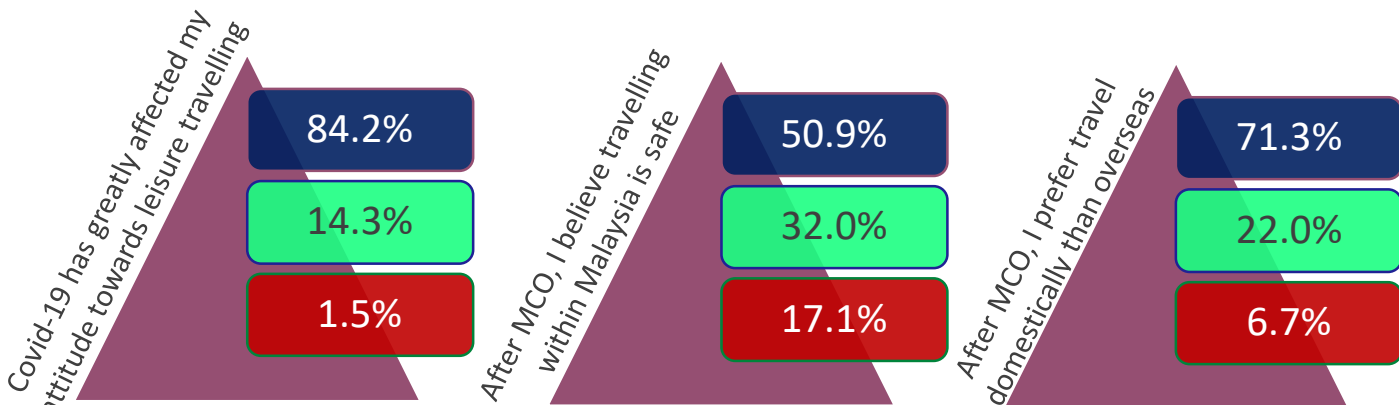


B8) AFTER MCO, I PREFER TO TRAVEL WITH :



SECTION C:

PERCEPTION AFTER MCO



Note: ■ indicate strongly agree/agree, ■ indicate neutral, ■ indicate disagree/strongly disagree

90.2/8.0/1.8
Own transportation

AFTER MCO,
I AM CONFIDENT TO USE (%):

30.6/37.0/32.4
Land public transportation

68.7/25.6/5.7
Hotel & Resort



38.1/45.0/16.9
AirBnB / others

45.2/38.3/16.5
Homestay

43.1/40.2/16.7
Airline

Note: ■ indicate strongly agree/agree, ■ indicate neutral, ■ indicate disagree/strongly disagree

PRIORITY BEFORE

Price

84.7/14.4/0.9

Hygiene & safety
97.4/2.4/0.2



Attractive products
82.6/15.8/1.6

DECIDING TOUR (%):

Note: ■ indicate strongly agree/agree, ■ indicate neutral ■ indicate disagree/strongly disagree

Travelling in crowded area
91.5/6.9/1.6

Travelling for Sports/Rec. activities
47.2/35.9/16.9

Travelling for shopping activities
67.6/24.9/7.5

Travelling for F&B activities
47.9/35.7/16.4



Travelling for Theme Park activities
63.1/26.9/10.0

Note: ■ indicate strongly agree/agree, ■ indicate neutral ■ indicate disagree/strongly disagree

TOP 10 RESPONDENTS OPINION ON WHAT WILL ATTRACT TOURIST TO TRAVEL TO MALAYSIA

Island & Beaches
76.8%



Food Haven 72.2%



Value for Money 67.8%



Multiracial Country 57.8%



Ecotourism 57.0%



Cultural/Festival Diversity 54.6%



Easy Access 46.9%



Greenery 45.7%



Muslim Friendly 45.2%



Historical Rich Destination 45.1%



(multiple response)

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