

# A review of the current hotel industry situation in Malaysia

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## Abstract

This review focuses on the hotel industries current situation and highlights the current state, capacity, strength, and vulnerabilities for the future after the pandemic times. The tourism development in Malaysia has paved way for the hotel industries development. These developments include Job opportunities, Infrastructure development, Tourism product development, and Education. However, there are vulnerabilities in the industry that consists of Homestays Models, Organisational Culture, Job satisfaction and turnover. The future for the hotel industry would depend on Industry 4.0 and Lean Management for their progress. Data were gather based on journal articles, tourism websites and professional consultancy websites. Based on this review the author offers and insight and a summary of what has been supported in the literature on the Hotel industry in Malaysia.

## Keywords:

Hotel Industry, Malaysia, Literature review, Organizational Culture, Industry 4.0, Lean Management

## 1 Introduction

Malaysia is a gifted country blessed with its mother nature, coastal areas, history, diverse people of different cultures and the development of the tourism industry has evolved around it. The tourism industry has grown significantly, and Malaysia managed to obtain (26.01 million) tourist arrivals and tourist spending of (86.1 billion) for year 2019. This have transcended well for the hotel industries as well. The hotel industry has gone through a substantial transformation in the past 18 years. Tourist arrivals and globalisation has further propelled Malaysia's hotel sector as it has encouraged business expansions in the service sectors (Githinji, 2017). The number of hotels increased tremendously from (1492) hotels in year 2000 to (4750) hotels in year 2018 and with (124,413) rooms supply in 2000 to (308,207) room supply in 2018 (Tourism Malaysia, 2020). This makes the total room supply from 2000 to 2018 a staggering of (475,000) rooms. The number of local guests staying in the hotel amounted to (8,0202,019) million domestic guests and (11,620,709) million international guests. And the hotel has had an average occupancy of (60%) from year 2000 to 2018 (Tourism Malaysia, 2020).

Geographically, Malaysia is situated between Thailand and Singapore, and this has helped in Malaysia developing its tourism potential. The highest tourist arrival was recorded by Singapore with (13,272,961) million tourist and Thailand was placed fourth (4th) with (1,780,800) million tourist arrivals for year 2018. The growth of the hotel industry has been in an upward bound (Tourism Malaysia, 2020). Now as of this year 2020, it has been critical to ensure the survival of the hotels due to the COVID-19 pandemic.

Due to the nature of the pandemic situation, there is restricted movement allowed around the globe and this has caused the demise of tourist and the hotel industry in Malaysia have succumb to losses. This has led to hotels applying cost effective measures and closing their doors until the situation has subsided or eventually closing their business altogether (Karim et al, 2020). Malaysia's projected growth in the hospitality sector would be imperative to the tourist arrival factor which in return creates an environment for attracting new and further developing the hotel industry. Millions of people have lost their livelihoods and occupations because of unexpected travel restrictions and border closures in most countries throughout the world. Due to lengthy travel restrictions and Movement Control Orders (MCO) imposed by the nations, 100 million jobs have already been lost in the tourist and hospitality sector, putting another 197 million jobs at risk, as well as a projected loss of 5.5 trillion in travel and tourist GDP this year WTTC. (2020). Moreover, while the worldwide tourist ban remains in place, the number of COVID-19 cases continues to increase around the world (Puvanewary, 2020)

This review paper would further examine the hotel industry to comprehend their current position, strength and vulnerability of the industry here in Malaysia. This is an attempt in providing a review to expand the literature on the hotel industry in Malaysia at this present time. This review includes articles that have been obtain through data search on Google Scholar and EBSCOhost. The believe is that these data search obtain

represent an appropriate overview of the hotel industry literature. The timeframe of the current study ranges from 2011 to 2021 that includes some seminal papers in the field.

## **2 Literature Review**

### **2.1 Hotel Industry**

The hotel industry comprises components to their products to complement their services to guests. Rooms and Food Services are the main components which supports events, business needs and tourism needs. Hotels operates with a special system that provides services to supplements their products for their guests, which is people oriented. The hotel acts as the host and provides guest services in return for revenues. The guest and employees contact becomes part of the service delivery. This in return creates an essential bond between the hotel as its host and their guest the service consumer. Hotels are bound by these principles (Sangaran & Garg, 2012).

The Rooms division involves accommodation services for those guest that are away from their homes. This includes services and facilities such as housekeeping and laundry services that will keep guest feeling at home during their stay. The Food Service division caters to the guest need of sustenance and the facilities include a variety of specialty restaurants, events, and catering services (Kumar et.al, 2015). The nature of the hospitality business is complex as it provides both tangible and intangible products. The tangible products would be the physical products guest meets and the intangible products are the services rendered to guest (Lockyer, 2013). The complexed nature of the hotel product is highly perishable. If the room nights are not sold, then the room revenue for an unoccupied room for that day cannot be recovered. This creates an environment where the product delivery must match service delivery by the hotel to their guest (Cohen & Olsen, 2013). To achieve this service guests requires to patronize the hotels of their choice. However due to the pandemic situation hotels had to close their doors (Ivkov et al, 2019).

#### *2.1.1 Pandemic Situation*

When there is a disaster or pandemic situation which leads to the disruption of tourism activities and tourist movements it would halt the hotels progress and developments. The hotel industry is becoming more vulnerable to these certain risks (Ivkov et al, 2019). We can examine this during Tsunamis, SARS and even now during the COVID-19 pandemic. Many hotels have taken cost control measures including inducing involuntary turnover measures to sustain during this time. Nearly 30 percent of hotels are projected to temporarily close their operations and 15 percent to shut

down totally their operations according to the Malaysian Association of Hotels (MAH, 2020). As of 16th March, hotel booking cancellation reports show that 170,085 rooms were cancelled worth of RM 68 million revenues (MAH, 2020). During the period 11 January 2020 to 16 March 2020, a total of 170,084 hotel room bookings were cancelled, resulting in a revenue loss of RM68,190,364. The emergence of COVID-19 was directly responsible for the loss. Kuala Lumpur was at the top of the list, as seen in *Table 1*.

The cancellation of hotel bookings resulted in a loss of RM23,021,301 in revenue, followed by a loss of RM11,550,605 in revenue for Sabah. Sarawak was the state that was least affected by COVID-19, with only 76 total room cancellations during the period, resulting in a loss of less than RM23 million. The cancellations of hotel reservations are expected to continue until MCO is over. As a result of MCO, which has been prolonged until May 12, 2020, the local hotel sector is expected to lose RM3.3 billion in income by June 2020. The nature of the industry is very dependent on the environment and tourism activity. Workers in Kuala Lumpur's hotel business have been the hardest hit by the outbreak. A total of 542 people, or (3%) of the total workforce, were laid off from a total of 17,826 workers. Meanwhile, 3641 (20%) employees were requested to take unpaid absence, while 2880 (16%) employees were facing wage cuts as seen *Table 2*. A total of 542 people, or 3% of the total workforce, were laid off from a total of 17,826 workers. Meanwhile, 3641 (20%) employees were requested to take unpaid absence, while 2880 (16%) employees were facing wage cuts. Risk and uncertainty created by natural disasters or pandemics makes the hotel industry vulnerable to these risks which can cause long term closures ( Bharwani & Butt, 2012).

Table 1: Severity of hotel room cancellations.

Ranking	State	Room cancellations	Losses due to room cancellations (RM)
1	Kuala Lumpur	55,050	23,021,301
2	Sabah	32,392	11,550,605
3	Pulau Pinang	17,753	8,908,000
4	Selangor	22,929	7,212,048
5	Negeri Sembilan	13,534	6,690,500
6	Johor	18,455	5,636,470
7	Kedah	3239	3,291,500
8	Perak	2403	1,022,289
9	Melaka	4074	690,499
10	Pahang	180	144,628
11	Sarawak	76	22,525
Total		170,085	68,190,364

Source: Malaysian Association of Hotel (2020).

Table 2: The impact of the COVID-19 pandemic on hotel industry workers.

Rank	State	Total workers (sampling size)	Number of workers being laid off	Number of workers facing pay cut	Number of workers facing unpaid leave
1	Kuala Lumpur	17,826	542	2880	3641
2	Perak	1653	245	91	595
3	Selangor	7981	238	134	1812
4	Pahang	1464	231	0	150
5	Sabah	4934	177	893	1075
6	Negeri Sembilan	1452	130	0	179
7	Sarawak	3488	92	175	258
8	Langkawi	4314	92	340	902
9	Melaka	1872	85	65	191
10	Penang	5549	84	240	430
11	Johor	3215	72	108	202
12	Terengganu	1298	53	52	101
13	Kelantan	560	0	76	157
14	Kedah	692	0	0	80
	Total	54,299	2041	5054	9773

Source: Malaysian Association of Hotel (2020).

COVID-19 has had a harmful impact on residents' financial, health, and mental well-being around the world. Travel and tourism are widely regarded as the economic and financial backbone of the planet. Without it, the world economy will suffer greatly in the years ahead in terms of financial, social, and mental adverse aspects WTTC. (2020). The Visit Malaysia 2020 campaign in Malaysia has been stifled by the impact of COVID-19. Because 64 percent of Malaysia's tourists came from China, Singapore, and Indonesia, all of which were hit hard by the pandemic, a significant number of tourism excursions to Malaysia were reduced or cancelled, (Foo et al, 2020; Ganesan, 2020).

### 2.1.2 New Policy and Standards

The direction looks bleak during this pandemic time. However, rest assure that the hotel sector in Malaysia will bounce back. The hotel industry has a strong record of being resilient. Hotels must be ready for new policy and standard operating procedures. Sanitation and Social distancing will be the new norm (Economic Times, 2020) as well as the environmental consideration as it has started to heal itself during this restricted movement times. When guests are presented to the environmental practices, sanitation, and social distancing it would create a sense of confidence in them (Sangaran & Francis, 2015). Revisit intentions can only happen when guest find safety and comfort level (Zuratul et al, 2016) within them towards a brands products and services delivered. Guest will be considering this when looking for a hotel of their choice. Hotel brands that

can portray this standard will gain new followers to their brands creating revisit intentions to hotels that prioritizes guest and hotels safety and security. Other opportunities will be for the hotels to target local tourism due to closed borders at present to support their survival with deals that suites the locals need. This will ensure their brand recognition and support will be continuous (Kumar et al, 2017).

With continuous development and strategies, the hotel industry has been shown their capacity in further developing. We will observe further some areas of their strength.

## **2.2 Infrastructure Development**

The main reason the tourism development occurred is due to the infrastructure development that is ongoing in Malaysia. The Economic Transformation Plan (ETP) in 2010 was launched to induce the development and growth of the transportation, healthcare, education, retail, communications, services, and other sectors (Bhuiyan et al, 2013). Due to this sectors development, Malaysia have been able to be successful in supporting tourism demand and this has led to the development of tourism products and the hotel industry (Mosbah & Saleh, 2014). The spill over effect of development have allowed the hotel industry to attract investors for developing hotels in Malaysia. (Bhuiyan et al, 2013) and this has created an inflated scenario in terms of hotel and room demand and supply being price attractive which allows for the growth that we observe today. The government funds, the majority of constructed infrastructure in Malaysia, and this sort of infrastructure is referred to as public infrastructure. These infrastructures are known as public infrastructures, and they are typically divided into five categories: water and sanitation, telecommunications, power, highways, and ports. Due to the government's dedication to improving the tourism industry, most tourist locations in Malaysia, particularly in urban areas, have adequate tourism infrastructure (Abdullah et al, 2014)

## **2.3 Tourism Product Development**

The development of tourism products has led to a new segment market being targeted and creates an increase of accessibility to countries such as China, India and the Middle East who makes up the majority of tourist arrivals and tourist receipts in Malaysia. With the development of the retails industry, it has made Malaysia a top destination for shopping and the flight coverage has increased. Most shopping destinations are in city centres and city hotels benefits from this influx of tourist that are interested in shopping and city tours (Tourism Malaysia, 2020). MICE has been developed further and with the devaluation of Malaysian ringgit has allowed for more tourist spending and increased

room nights and expenditure in hotels at tourism destinations. This allowed for the MICE sector to be developed further making Malaysia an attraction for their events and activities (Mosbah & Saleh,2014). Expos, Conventions, and Mega events have been organised here in Malaysia and the halal sector has further propelled Malaysia in their hotel sector growth with events surrounding HALAL activities being held (Othman et al, 2016).

## **2.4 Job Opportunities**

The Tourism industry have been known to create job opportunities for the service sectors. According to the figures published by the Department of Statistics of Malaysia (DOSM) as of 2018 there were 3.5 million employees hired for tourism related jobs where Accommodation/hotel (6.4%), Food and Beverage service (34.1%), Airlines (4.9%), Retail (33.1%) and others (21.4%). The results for the hotel industry percentage constitutes to 5,833,333 million employees. With the tourist arrival significantly increasing the number of hotels has mushroomed in Malaysia and the number of jobs available increased. Being labelled as a service sector, the industry requires manpower to cope with the demands of customers and to ensure smooth operations can be provided to their hotel guests. This creates a scenario for hotel jobs to be readily available (Sangaran & Anshul, 2012; Sangaran & Kumar, 2015).

## **2.5 Education Industry**

The most interesting of all is the Education industry benefiting from the growth of the tourism and hotel industry. There has been an increase of hotel education programs to support the development of the industry with 81 percent growth from 2010 to 2015 (Sharif & Abidin, 2015) and the growth tends to be upward bound. There have been certifications and terminal degree programs which has emerged, and this has given way for many students and employees to be certified in this area of field (Deale & Schoffstall, 2015). This program has provided students with a choice in their career selections and hence with, hotel education has increased the perception of hotel jobs among students (Jaykumar et al, 2015). Malaysia Centre of Tourism and Hospitality Education (MyCentHE) pertain to human capital development in Malaysia managed to increase the annual output for trained and qualified Hospitality and Tourism employees by 50,000 in 2020. Therefore, increasing the qualified graduates with Diploma or Degree level qualifications from 13 percent in 2009 to 50 percent in 2020 (Hussain et al, 2020). There are great prospects for Hospitality and Tourism education in Malaysia that will support job opportunities.

With continuous development of the industry, certain vulnerabilities will start to develop. The main concerns are competition from other similar products like Homestays, maintaining an acceptable culture for work to retain employees and the Forth industrial revolution.

## **2.6 Homestay Models**

The hotels face vulnerabilities in terms of homestays; AirBnB models. The hotels main products offered are Rooms and when similar product competitors flourish this disrupts the supply flow (Omar & Arif, 2017) The hotel industry must compete with homestays, and this has created many challenges for the hotels to overcome as pricing and services differ from the homestays compared to hotels (Omar & Arif, 2017). There are 5,542 registered homestays in Malaysia and in Kuala Lumpur, which has ranked Malaysia as the third in the world for homestay growth according to the AON Hewitt survey in 2016. This has led to steep competition between star rated hotels and other accommodation providers in the current pandemic situation (Hanafi et al, 2020).

## **2.7 Organizational Culture**

The Organizational culture effects how the organization performs, and research reveals when the culture is volatile employees quit their jobs. Hotels tend to have a poor work culture at the front-line levels of work. This are the areas that suffer from the highest turnover. Poor management skills and supervision, political and racial conditions, unpleasant behaviors of employees at work tend to create a weak culture. Management structure in the hotels are still very traditional. There are many decision-making processes directed for employees to comply and there are very little communications or directions provided for their inputs to be considered (Abdullah et at, 2011). Creating a sustainable workforce is crucial to ensure there is continuous takers for local jobs. The hotels require to find a balance in maintaining potential employees and manage to attract new employees. This is an ever-present challenge in the industry (Baum et al, 2016).

### *2.7.1 Job Satisfaction and Employee turnover*

Job satisfaction is an area of concern and based on other research findings, salaries act as a main factor that would influence employee's decision to quit their jobs (Bustamam et al, 2014). Currently the hotels provide a minimum wage structure. However, the turnover rates are still at its highest and research highlights that, salaries are still the top factor leading to quitting jobs. Potential for upward mobility in terms of promotions is another factor that leads to employees resigning from their jobs. Career growth would affect job motivation and hotels tend to have a very slow growth rate for

employees to upgrade themselves in their career (Sangaran et al, 2012; Sangaran et al, 2015; Koo et al, 2020).

Every industry has their set of challenges. The hotel industry challenges are slightly unique as Malaysia is home to multi-cultural background employees and supported by foreign work force (Sangaran & Anshul, 2012). Managing employees are the biggest challenge in any industry with no exception to the hotel industry and it tends to have the highest turnover rates according to the survey conducted by AON Hewitt Malaysia in 2016. This occurs at the front-line or rank and file level. Employees do not retain long in their role at this level whereby the guest demands for service is high and the pressure to fulfil the required service demand by the management is performed through the front-line employees. There is a mismatch between the number of jobs offered against the number of jobs accepted and sustained. The hotels require the employees to work shifts that are long hours and during the holidays as the hotel operates 365 days. This takes a toll on their work life balance (Francis & Sangaran, 2015).

## **2.8 Industry 4.0**

The service sector would go through the Industry 4.0 transformation. The hotel industry would face challenges regarding the mass customization, digital enhancements, smart work environments and efficient supply chain in the industry concerning industry 4.0 transformation. However, a proper and applicable management systems and approaches are required to develop capabilities which will promote learning, innovation, knowledge management and technology acceptance. This will enable the hotel organisation to perform in the Industry 4.0 environment (Shamim et al, 2017). The industry systems will support the transformation however the service orientations will still be personalised, and a human touch will be prioritised. Nevertheless, the industry needs to continuously require learning to improve necessary competencies and skills to overcome barriers towards industry 4.0. Many of times the lack of competencies and financial resources represents the greatest barriers to the industry 4.0 (Vuksanović Herceg et al, 2020).

## **2.9 Lean Management**

Lean management concept has started making its way into the hotel industry. The main aim for Lean management to be implemented is to create value to an organisation during this pandemic situation. When organisational turnover decreases and at the same time the cost of operation increases this results in the decrease in profits. For instance, the hotels overheads, food and energy cost will keep increasing with price fluctuations, increasing or changing taxes (Rauch E. et al, 2015). This situation leads to a

hotel creating lesser value or profits to their organisation. Hotels would have to look at strategies to reduce leakages that will diminish the value to the hotel. When this is achieved the quality of products offered by the hotel will improve. In the current situation of the Hotel industry, the hotels long term survival is the utmost priority. The areas the hotels can apply lean management would be the organisation and its employees, production planning and control, and the quality standards (Vlachos & Bogdanovic, 2013)

### **3 Conclusion**

In conclusion, the review was conducted based on the literature that was deemed crucial in building a literature suggestion for the hotel industry perspective in Malaysia. At present times with the current pandemic crisis, Malaysia's hotel industry has been resilient even with casualties, in times to come the hotel industry would require to strategizing their efforts on economic methods, improving standards and policies in their establishments to sustain. As observed, we will witness the biggest change in the Malaysian Hotel industry surrounding the industry standards, lean practices, and industry 4.0. The hotel industry must be cautions towards these rapid changes and maintain their organisational culture and employees to sustain hotel jobs. With continuous development in the country promoting Tourism the hotel industry will certainly strive.

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