

# An Analysis to Set the Regulation up for Tourism Industry in New Normal Pandemic of Covid-19

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**Abstract:** Indonesian tourism had beautiful destinations for the local and foreign tourists. The number of tourists were always over than 1 million tourists. Currently, Indonesia suffered to Covid-19 pandemic. It also hit deeply the Indonesian tourism. The study analyzed the regulation to bring the tourism up. The method used in this research was qualitative comparative case study, which compared among 3 countries (Indonesia, Malaysia and Singapore). The results indicated that some regulations from Malaysia and Singapore can be applied in Indonesia to leverage the national tourism industry, especially e-commerce and e-business.

## 1 INTRODUCTION

Indonesia always had a place in every tourist's hearts because there were so many travel destinations to visit not only by domestic tourist but also foreign tourist (Mariyono, 2017). Foreign tourists who came to Indonesia raised each year from 14 millions in 2017 to 16 millions in 2019. Up to April 2020, the number reached up to 2,7 millions people (Badan Pusat Statistik, 2020). From 2017 to 2020, most of foreign tourists who visited Indonesia came from Asia and Europe (Xu et al., 2018). From figure 1, international tourist arrivals who visited Indonesia based on continent between 2017 up until April 2020 was dominated by ASEAN, Asia (exclude ASEAN), Europe, and Oceania (Badan Pusat Statistik, 2020).

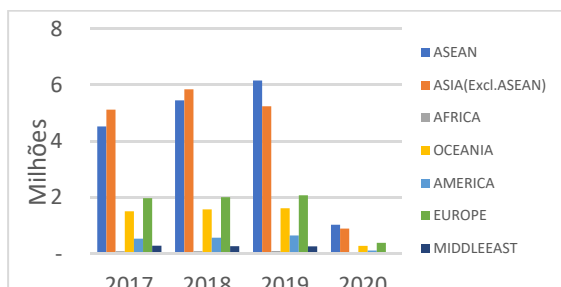


Figure 1: Foreign Tourists Who Visit Indonesia (Badan Pusat Statistik, 2020)

Based on Figure 1, we, the authors, define some countries in each continent. From each continent, total tourists who visited to Indonesia came from Malaysia (ASEAN) with average 2.5 millions/year, China (Asia excl ASEAN) (2.1 millions/year), Singapore (ASEAN) (1.7 millions/year), Australia and Timor Leste (Oceania) (1.3 millions/year), India (600 thousand/year) (Asia) and USA (400 thousand/year) (America) (Badan Pusat Statistik, 2020). It surely indicated that Indonesia became more popular among foreign tourists. While almost foreign tourists who arrived in Indonesia took accommodation in hotel, we could see the favourite tourism destinations in the past 4 years based on hotel occupancy rate that was shown in Figure 2.

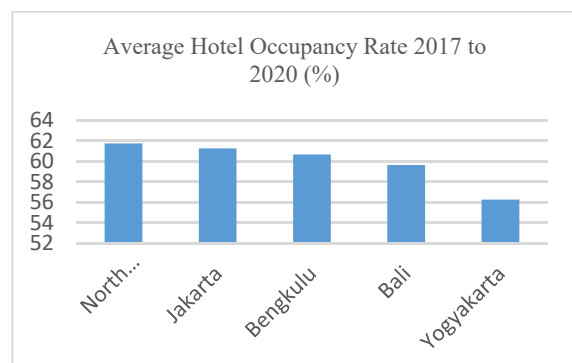


Figure 2: Average Hotel Occupancy Rate from 2017 – 2020 (Badan Pusat Statistik, 2020)

The interesting thing from figure 2 above was North Sulawesi and Bengkulu (Parassa et al., 2018). Those areas became more popular among tourists because the percentage of hotel occupancy rate overtook the most favourite island in Indonesia, namely Bali (Mariyono, 2017). In figure 2, Jakarta had high percentage of occupancy rate because it served not only as tourist destination, but also as business purposes. As capital of Indonesia, it held most important business role in Indonesia (Pamungkas et al., 2018).

After Covid-19 outbreak, Indonesian tourism was hit hard and most of tourism destinations temporarily closed faltering economy (Wang et al., 2019). For instance, Indonesia had closed its border to tourists and travellers from China. However, China had the second highest foreign visitors, but Covid-19 impacted really hard to Indonesian tourism (Parassa et al., 2018). In July 2020, Covid-19 pandemic had inflicted huge damage to tourism sector, as it lost potential revenue reached out to Rp 85 trillion (US\$ 5.87 billion) including hotel, restaurant, leisure, aviation and other sub-tourism industries (Akhlas, 2020).

In the first place, Singapore underestimated the outbreak and even tried to endure at the early pandemic that caused high transmission of the virus with high death toll rate. This condition even had fallen deeply the Singaporean tourism after most countries imposed travel restriction on Singapore (Tay, 2020). After several investigations (Pung et al., 2020), Singapore then closed its borders from inside and forbid everyone to enter Singapore, especially from China followed with national program called "Circuit Breaker" in response with an uncontrolled growing number of new cases (Pung et al., 2020). Singapore also quickly released several regulations called Covid-19 (Temporary Measures) (Control Order) Regulations 2020 after formed multi-ministerial committee and task force (Legislation Division of the Attorney-General's Chambers Singapore, 2020). Singapore also contributed US\$500,000 to support WHO fighting Covid-19 (CNA, 2020).

When the first wave of pandemic in Malaysia occurred, it caused a national threat among the citizens. Malaysia immediately announced total lockdown approach called Movement Control Order (MCO) (Shah et al., 2020) which resulted in panic buying in all shopping centers, especially medical equipments (face masks and sanitizers) (BERNAMA, 2020). This also caused large disruption in economic and social scale that created anxieties among the citizens (Salim et al., 2020).

Malaysia which relied much in tourism business also suffered great losses. Since, main travellers who arrived from China were banned to enter this country. The Tourism, Art and Culture Minister of Malaysia even estimated that tourism business had lost potential revenue up to RM45 billion (US\$ 10.5 billion) (Shah et al., 2020).

Since the pandemic of Covid-19 that caused great losses everywhere occurred in all over the world, immediate action must be taken. The action was especially from the perspective of Indonesian government who has to be quickly responded throughout the establishment of regulations relating to recovery. This research aimed to analyze how Indonesia would prepare to recover tourism industry after the new normal would have been applied by learning from comparison to regulations and policies from other neighbouring country namely Singapore and Malaysia. This study chose Singapore and Malaysia because both countries are in South East Asia and ASEAN members with some relevant situations mentioned above. In addition, this study also led and filled the state-of-the-art in tourism industry, especially among Indonesia, Singapore and Malaysia. Therefore, the findings in this article could contribute well on new normal in Indonesia and accelerate the performance of the government and all stakeholders in order to formulate the best strategy together.

This paper is organized as follow. The next section is our literature review regarding the regulations and policies. The following section describes our method and results then discusses the results. The last section is the conclusion and future works.

## 2 LITERATURE REVIEW

### 2.1 Regulations and Policies

To encounter the Covid-19 outbreak, the Indonesia government had drafted several regulations. For instance, they prepared specific task force facing this outbreak called Satgas Covid-19 (Covid-19 troops). Table 1 were regulations that specifically concerned in travel and tourism during Covid-19 situation (Su et al., 2018).

Table 1: Regulation and Policy in Indonesia.

No	Category	Description	Issued by
1	Constitution	UU No. 6/2018 - regulations about National Health Quarantine Procedure and Security	Health Ministry of Indonesia
2	Constitution	UU No. 4/1984 -regulations about Plague and Diseases Control	Health Ministry of Indonesia
3	Constitution	UU No. 36/2009 - Regulations of General National Health Security	Health Ministry of Indonesia
4	Guidelines	Guidelines to use E-Hac (Electronic Health Alert Card) App	DG of Disease Prevention and Control from Health Ministry of Indonesia
5	Guidelines	WHO guidelines to personal protective equipment usage	World Health Organization (WHO)
6	Guidelines	Guidelines and SOP to evacuate airline and sea transport passenger	Indonesian Society of Respiriology
7	Ministerial Regulation	Minister of Health regulation - No. 9/2020 about guidelines of large scale social distancing	Health Ministry of Indonesia
8	Ministerial Regulation	Government Regulation - No. 21/2020 about guidelines of large scale social distancing	Health Ministry of Indonesia
9	Presidential Decree	Presidential Decree - No. 11/2020 about guidelines of	President of Republic Indonesia

No	Category	Description	Issued by
		large scale social distancing	
10	Circular Letter	Government Rule about guidelines of large scale social distancing	Health Ministry of Indonesia
11	Ministerial Decree	Ministerial decree - No. 104/2020 about determination of coronavirus novel infection (2019-nCoV Infection) as a disease that can cause an outbreak and its mitigation efforts	Health Ministry of Indonesia
12	Circular Letter	Guidelines for preparing for corona virus novel infection (2019-nCoV)	Health Ministry of Indonesia
13	Decree	Decree of the Head of National Disaster Management Agency - No.13A/2020 about extension of status of emergency disasters outbreaks of corona virus in Indonesia	National Disaster Management Agency
14	Regional Decree	Decree of department of tourism and the creative economy DKI Jakarta - No. 131 about protocol for COVID-19 prevention and control for the tourism sector during the transition to healthy, safe and productive community	Department of Tourism and the Creative Economy DKI Jakarta

As this article was written, the Indonesian Ministry of Tourism and Creative Economy was still drafting official regulations and protocols to manage how tourism would recover and face toward new normal (Kemenparekraf, 2020). Since there were still no specific official regulations regarding tourism yet, except from regional service such as Jakarta Tourism and Creative Economic Agency. Most of tourism sector used temporary regulation referred to International Protocol from WHO namely Clean Health and Safety (CHS) protocols (Nicola et al., 2020).

## 2.2 Previous Research

Tourism in Indonesia held important key to Gross Domestic Product (GDP), because it contributed about 4.11 to 4.25% year over year (yoy) to Indonesian GDP (Badan Pusat Statistik, 2020). Interestingly, many Indonesian people paid for travel accommodations through e-commerce and digital applications as can be seen in Figure 3.

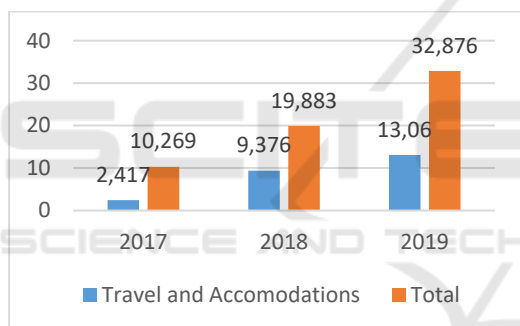


Figure 3: E-commerce Spending by Category (Badan Pusat Statistik, 2020).

Based on table 3, travel and tourism provided high revenue in e-commerce sector and kept well increment (Vorobieva et al., 2018). In 2017, Indonesians spent over \$10 billion through e-commerce where their spending from Travel and Accomodation category reached to \$1,436 billion. It means over 23% of e-commerce's total revenue came from accommodation and travelling category since then. In 2018, total amount of e-commerce revenue by all categories raised up to \$20.3 billion which \$9.3 billion or more than 45% of total revenue came from online travel purchases. In 2020, the travel and accomodation category still had high growth whose revenue increased to \$13.06 billion or about 32% of total online spent from all categories (Badan Pusat Statistik, 2020). It indicated that most people in Indonesia relied on e-commerce

applications for accomodation and travelling needs (Yang, 2019).

As for short commute and local applications, Gojek app that served not only as ride hailing application, but also as food and goods delivery dominated the competition in mobile application usage. Gojek also ranked first in the application ranking among others in top travel and local application list in Indonesia that can be seen in the table 2 (Pamungkas et al, 2018):

Table 2: Travel and Local Apps Ranked in 2020.

App Name	Publisher
Gojek – ojek taxi booking, delivery and payment	PT. Aplikasi Karya Anak Bangsa
Traveloka – book hotel, flight ticket & activities	Traveloka
Google Earth	Google LLC
GPS Map Camera	JK.Fantasy
Gojek Driver	PT. Aplikasi Karya Anak Bangsa
OYO: travel & vacation hotels   hotel booking app	OYO
RedDoorz – hotel booking app	RedDoorz
Google Maps Go – directions, traffic & transit	Google LLC
Gas station car driving simulator car parking game	Centaurus Games
KAI Access – train booking, reschedule, cancellation	PT. Kereta Api Indonesia
Moto bike pizza delivery 2019 – girl food game	Freaking Games
tiket.com – Flight, Hotel & Activities	Tiket.com
Agoda – Deals on Hotels & Homes	Agoda.com

During the Covid-19 outbreak, Malaysia as neighbouring country next to Indonesia also suffered from serious effect which at first they did not aware how dangerous the virus was and even underestimated it. In January 2020, Malaysia even had no intention to ban all travellers arrived, which mostly came from China (Yang and Lo, 2018). After rapid uncontrolled growth of positive patients, they

quickly responded via The Ministry of Health and The Ministry of Tenaga Nasional Berhad and drafted several regulations, i.e raised great funding to get financial aid from corporate companies, government link companies (GLCs) and other stakeholders in Malaysia in order to recover faster (Shah et al., 2020).

Similar to Malaysia, Singapore as the first ASEAN country which confirmed the first death suffered great loss to Covid-19 outbreak and responded quickly by closing all borders and quarantined all people, and even announced the multi-ministry task force to ensure public safety. While most of previous Covid-19 related research usually focused to measure economic impacts, to prevent economic losses but less of them discussed the government decisions in order to make proper regulations (Sigala, 2020).

For other example, there were articles that researched about consumer and competitor orientations to gain marketing purposes on tourism, especially during the recovery from such pandemic disease (Herrero et al., 2018). Other article discussed Saudi Arabia, as a central of pandemic while it was one of the biggest destination of travellers, especially muslim to do Hajj. It analyzed how Saudi Arabia learned a lesson years ago during SARS-CoV-2 pandemic (Algaissi et al., 2020) and implemented solution such as total lockdown in the first place. Saudi Arabia also even closed the border for all muslim people, especially to do pilgrimage this year.

### 3 RESEARCH METHOD

This study adopted a post positivist research philosophy with qualitative and descriptive approach (Bradshaw et al., 2017). The method used was comparative case study. This study used the method that considered appropriate analysis to give further in-depth information for regulation investigation in each compared case (Kim et al., 2017). It was also for the exploration on how different factors interrelate and influence their decisions (Kim et al., 2017). Contents of this method were as follows (de Oliveira et al., 2018).

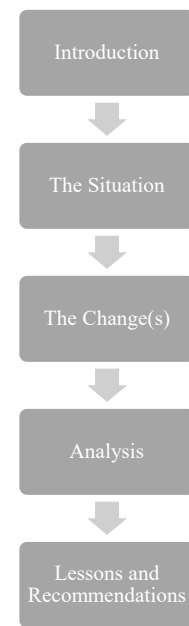


Figure 4: Philosophy of Qualitative Research (Bradshaw et al., 2017)

The method consisted of several steps. There were introduction, the situation, the change(s), analysis and lessons and recommendations (Bradshaw et al., 2017). We were going to explain each step from figure 4.

For the first step, the headline or the introduction was observed through previous research, articles, and news. The particular challenge was global pandemic that impacted almost all countries in the world. So, the effort was needed in order to get out of this situation. From all collected information, we then determined the key message. The key message was the urge of regulation drafting to get through the pandemic, especially in tourism sector. After that, the comparison analysis has been taken as the type of case study.

For the second step, the situation was observed. It was to observe what regulation that have been planned and realized. The observation was to capture all regulations in Indonesia, Singapore and Malaysia.

The third step was the change(s). We examined the tangible key change and also evidence that showed up. In addition, we also captured what changes have occurred before and after the regulation drafted.

Upon data collection for analysis step, we then analyzed all regulations among 3 countries. The indication and key factors in the regulation from each government were considered as effort of each country to get out the pandemic situations. We also



determined the potential regulation and long term implications, not only in tourism sector but also in all sectors in order to recover. The best regulation and policy was the one that could be implemented in all sectors.

Last step was to learn the lesson and to give the recommendations. The lesson learned was by observing countries that might be used by other countries and sectors as recommendation for their government to draft similar regulation. It needed some local adjustments regarding to each country as respond to such similar occurrences.

The comparative case was being used to compare some different situations or to compare change across countries. It was also being used to compare organizations and stakeholders. It could help to explain and explore the implications of different interventions to set similar or different policies.

Materials used in this research were documents not limited to but including policies, regulations, guidelines, and decrees that were observed and collected in order to understand the phenomenon. It could later be used as important finding to government and all stakeholders to draw up suitable regulations and policies. Better formulation and strategy especially in tourism sector could be achieved toward new normal behaviour after Covid-19 pandemic and such case in the future.

## 4 ANALYSIS RESULTS AND DISCUSSION

### 4.1 Analysis Results

For up to June 2020, confirmed cases and deaths trendline caused by Covid-19 in Indonesia, Malaysia and Singapore were shown in figure 5. The figure 5 gave holistic cases and deaths among 3 countries:

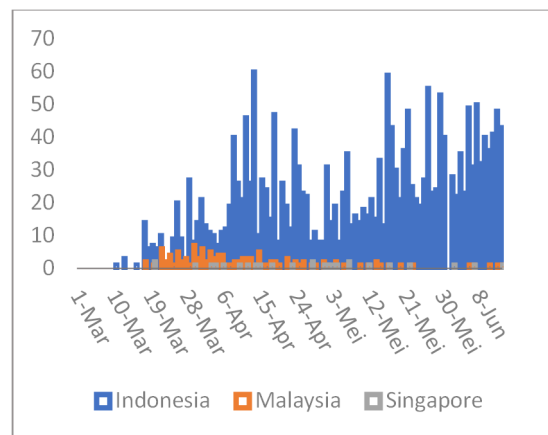


Figure 5: Confirmed New Death by Covid-19 in Indonesia, Malaysia and Singapore (World Health Organization, 2020).

In South East Asia, Indonesia was one of the countries with a fairly high death rate due to Covid-19 pandemic. It was caused by poor preparation phase from the government where they were downplaying with the health factor, instead totally focused on the economy and national security. As a result, in the first phase of pandemic, Indonesia suffered great loss with the high death toll rate and high confirmed cases compared to Malaysia and Singapore. Figure 6 described the confirmed cases by Covid-19 in Indonesia:

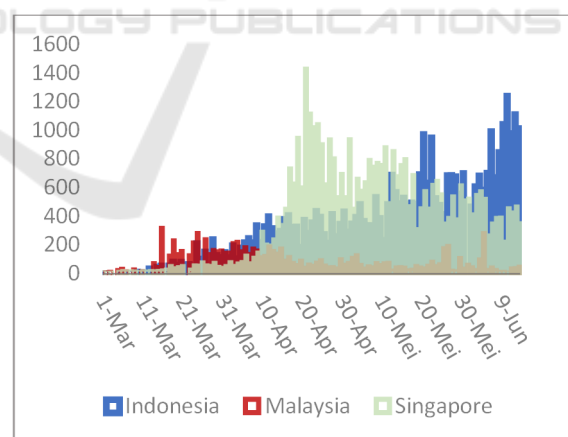


Figure 6: Confirmed New Cases by Covid-19 in Indonesia (World Health Organization, 2020)

On the other hand, Singapore with a high number of new cases actually succeeded in suppressing the new death rate. Likewise with Malaysia, which immediately rushed to tighten the regulations and at the same time cooperated with all stakeholders also succeeded in suppressing the low number of new

cases. Unlike the other two countries which had decreasing trendline after the first phase, Covid-19 pandemic in Indonesia still grows high. Although by death per million population in Indonesia is still very low compared to other countries especially in Europe and America, Indonesia has high death among Southeast Asian countries (Pongwat, 2017; World Health Organization, 2020). This was due to the behavior of Indonesian people who still underestimated the impact of this pandemic. So that, even though the government has ordered to comply with WHO regulations including self isolation and social distancing, there were still many people who violated it, especially in big cities like Jakarta and Surabaya.

Therefore, we summarized the regulations comparison between three countries in order to take advantage of other country's regulations that have been successfully implemented. So that, Indonesia could also follow it with some adjustments. The reason was to suppress new cases and deaths for rebuilding Indonesian tourism confidence. In addition, travellers could feel better safety to visit Indonesia in the future. Table 3 was the summarized regulations between three compared countries.

Table 3: Regulation Comparison Summary among 3 Countries

Descripti on	Indonesia	Malaysia	Singapore
Confirmed case per June 2020	37,420	8,445	40,197
Confirmed death per June 2020	2,091	120	26
Confirmed case per million population	137	261	6,871
Death per million population	8	4	4
Trendline during isolation	Slowly decreasing	Quickly decreasing	Quickly decreasing
Trendline during new normal	Increasing	Slowly increasing	Decrease steadily
General medical regulations	Rather extensive	Extensive	Extensive
Program's	Large	MCO	Circuit

Descripti on	Indonesia	Malaysia	Singapore
Name	Scale Social Control (PSBB)		Breaker
Specific regulations on tourism	Region specific	National	National
Guidelines	Region specific	National	National
Law force	Moderate	Strict	Very Strict
People's legal observance	Low to Medium	Middle to High	High
Travel restrictions during first wave pandemic	Closed for foreign traveller	Closed for foreign traveller	Closed for foreign traveller
Travel restrictions during new normal	Re-opening with limited numbers	Re-opening with limited numbers	Re-opening with limited numbers
Medical screening	Strict in some region	Nationally Strict	Nationally Very Strict

Table 3 explained how the comparison of three countries treated new normal. Singapore was the strictest country compared the other countries. In the first phase of pandemic, Singapore threatened 6 months in jail for breaking social distancing laws namely Circuit Breaker, but now, Singapore lifted the ban to international travellers. Malaysia had similar program called MCO which implemented several regulations as in Singapore was.

## 4.2 Discussions

With its strictly programs and guidelines to follow, Singapore was seemed successful where they had lifted ban so travellers could now enter Singapore freely and safely. In new normal phase, Singapore would ease Circuit Breaker gradually with three phased: (1) Phase One ("Safe Re-Opening"), (2) Phase Two ("Safe Transition") and (3) Phase Three ("Safe Nation"). Singapore also provided fast lane to facilitate Chinese travellers to do essential business between both countries. Other than that, only Singapore residents and long-term pass holders was allowed to enter Singapore. In other words, short-

term travellers and tourists were prohibited to visit Singapore at the moment. Singapore had also closed all cruise vessels (Kuckertz et al., 2020). It was said that Singapore would open most tourism business activities to resume operations in this Phase Two with several strictly limitations. This included retail, food, beverage dine-in, personal health and wellness, home-based services, and sport and other public facilities (Vorobieva et al., 2018). All businesses have also to comply with Safe Management Requirements from government. Mass gathered events are only allowed in the later phase, such as Phase Three, if this phase was considered success (Wellman et al., 2020).

Meanwhile in Malaysia, they were entering the phase called Recovery Movement Control Order (RMCO) from June 10<sup>th</sup> 2020. In the meantime, they would lift the ban only for domestic travellers and country's borders remain shut, including from neighboring countries. During this phase, Malaysia reopened almost all public facilities including national zoo, restaurants and hotels with restricted rules. Under RMCO, hotels and resorts opened at full capacity because the local tourism had been given permissions by the government with strict SOP compliance (Gössling et al., 2020). In order to stimulate the tourism, government of Malaysia has also announced tax exemptions and relief of RM 1,000 for tourism expenses up to December 2021. Outdoor tourism such as hiking, camping, and jungle trekking were also allowed with less than 20 people in a group. The services (closed-contact services and close-contact sports) in Malaysia which were still allowed, such as reflexology, pubs, nightclubs, karaokes, swimming pools, boxing, football, and basketball (Bhati and Pearce, 2017).

Indonesia which was entering the third phase of Large Scale Social Restriction (PSBB), still did not have exact laws from Ministry of Tourism and Creative Economy. They only have issued decree from Jakarta Tourism and Creative Economic Agency No. 131/2020 regarding the protocol for Covid-19 prevention and control for the tourism sector. This protocol explained which business were allowed with some sort of guidelines. For example, most of public facilities were allowed only up to 50% of normal capacity including hotels, malls, tourism areas, zoos, indoor and outdoor recreational parks. In every area, people had to use mask. For inter-region travellers that would visited Jakarta and certain cities, some permission papers (called Surat Izin Keluar Masuk/SIKM) were required, otherwise they might not enter the cities.

Regarding tourism and travel, top 5 best travel applications especially for accommodations and hotels booking used in Indonesia up until now were Traveloka, OYO, RedDoorz, Tiket.com, and Agoda respectively (Pamungkas et al., 2018). At the moment, such applications were lost almost of their customers regarding the new regulation that impacted to almost tourism sector. For example, the new regulations were strict protocol in some public facilities, prohibition from holding an event with large number of people and limited recreational activities. As for that, the developer of the following applications should accommodate the new regulation toward new normal. Otherwise, not only they would lose their reputations respectively because people worried to use it. The worst case was that they could not recover potential revenue because of the first phase of pandemic (Kuckertz et al., 2020).

As we, the authors, studied this situation, it is the first research on investigation for new normal regulations among 3 countries on Indonesian tourism. This study can be basis of future research on Indonesian tourism from many dimensions.

### 4.3 Research Contribution

The true challenge that has to be faced by every country, including Indonesia is the recovery phase after the outbreak, especially with the current condition where neither proper medicines nor vaccines were no to be found yet. This research contributed as materials for considerations and recommendations to the government and all stakeholders, especially in tourism areas. Comparison with the two neighboring countries, i.e Malaysia and Singapore which were considered to have relevant conditions and demographics to Indonesia, could provide an overview of which policies they have implemented effectively and can be implemented in Indonesia. For example, Singapore's circuit breaker had successfully suppress the transmission level and also with low death toll rate in the second phase with strict order to the citizens. Singapore was even the first country who open border exclusively to and from China in this post-pandemic phase. Malaysia which entered recovery phase called RMCO also considered successful and has now opened most of tourism spots.

Government as policymaker have to work hard to make appropriate regulations alongside with all stakeholders. Therefore, considerable amount of useful recommendations were much needed. They must also be firm and provide better understanding



to the people, especially those who underestimated the existence of Covid-19 so that they would obey to regulations which can have an impact on the rapid recovery of this post-pandemic.

This research has also finding that the most reliable source to find tour and travel accommodation were through mobile and digital applications. This kind of bussiness where the most severely affected caused by pandemic. They suffered huge loss as most people today were reluctant to distance travel and go to tourism spot that usually crowded area. The one that endured pandemic, only related to ride-hailing services that serve now as foods delivery and local logistic courier.

## 5 CONCLUSIONS AND FUTURE WORK

In general, all three comparison countries above are ready to face the next phase of the Covid-19 pandemic, the so-called New Normal phase. Indonesia should follow several regulations, protocols, and guidelines that successfully implemented in neighboring countries in order to excel the recovery from Covid-19 pandemic. Furthermore, it is strongly recommended for the government, especially Ministry of Tourism and Creative Economy to collaborate with other ministries and stakeholders to accelerate the regulations, not only for region-specific but also nationwide.

It is also advised for all citizens in Indonesia to obey the rules made from government. Meanwhile at the moment, there are still some ignorant people underestimating how dangerous the risk would be and still disobey the laws, especially regarding health and safety during the pandemic.

With the growth of tourism and travel in Indonesia after implementation of New Normal activity, it would be wise for e-commerce and e-business players to prepare some adjustment in their applications. The players have to follow the government regulations so not only travellers could make use of it without worry, but also for the companies and developers to achieve better repuation and revenue.

In term of future research, the efficiency of new regulation during pandemic of Covid-19 on e-commerce and e-business can be conducted. It is to measure that the regulation can achieve the targeted performance during this situation.

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