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|  | **Malawi Government** |
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| **MALAWI INBOUND TOURISM REPORT (2020)** |



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# DIRECTOR’S REMARKS

Tourism is widely recognized as a catalyst for economic growth and development as such it drives urban infrastructure development in rural areas. The sector promotes business and employment creation in both urban and rural areas. It also creates demand for the country’s products and services.



The Malawi 2063 places tourism as a priority economic sector under the Urbanization pillar towards achieving inclusive growth and self-reliance. In the 10-year implementation plan, MIP 1, tourism has been considered as a tool towards achieving urbanisation through development of world-class urban centers and tourism hubs across the country, with the requisite modern socio-economic amenities.

Annual tourism statistics reports serve as a monitoring tool by which performance of the tourism industry can be tracked over a period of time. This information is useful in developing ideal marketing strategies for Malawi as a tourist destination as well as individual private tourism companies and can be used as a basis for making strategic decisions by both the concerned public and private sectors.

In the year 2020, tourism has been one of the greatly affected sectors by the Covid-19 pandemic which triggered travel restrictions globally. Locally, travel was also reduced as people were cautious to travel even domestically. The pandemic also impacted the global and the local economies, making it difficult for the travelling population to have disposable income for tourism.

**Sosten Lingwalanya**

**Acting Director of Tourism**

# EXECUTIVE SUMMARY

 In 2020, Malawi received 198,905 international visitors compared to 978,327 international visitors in 2019 representing 79.7 percent decrease.

Total expenditure by international visitors in 2020 was 3.3 billion Malawi Kwacha out of which 2.7 billion Malawi Kwacha was spent by visitors who came for Work/Business.

About 80 percent of departing visitors came to Malawi for Work or Business, 13.8 percent came to Visit Family and Friends and 6.1 percent visited Malawi for Holiday or Vacation.

The country with the highest number of international visitors was Tanzania (74,468) followed by Zambia (33,819) and Mozambique (13,302). For the long-haul markets, India had the highest number of visitors (853) followed by United States of America (598) and Australia (582).

The average national room occupancy rate was 15.6 percent while average bed occupancy rate was 13.0 percent. Room occupancy rate was high in the month of February at 27.8 percent and low in April at 7.3 percent each while bed occupancy rate was high in the month of February at 19.0 and low in April at 6.2 percent each.

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# ABBREVIATIONS

|  |  |  |  |
| --- | --- | --- | --- |
| DOI | : |  | Department of Immigration |
| DOT | : |  | Department of Tourism |
| MWK | : |  | Malawi Kwacha |
| NSO | : |  | National Statistical Office |
| UNSC | : |  | United Nations Statistical Commission |
| UNWTO | : |  | United Nations World Tourism Organisation |
| USD | : |  | United States Dollar |
| VFR | : |  | Visiting Friends and Relatives |
| WTTC | : |  | World Travel and Tourism Council |

# INTRODUCTION

Tourism is considered as a key driver of development in emerging economies. Recognizing this potential, the Government of Malawi adopted tourism under Urbanization as one of the three enabling pillars to attain the country’s long-term vision of inclusive wealth creation and self-reliance (Malawi 2063).

The potential of tourism is evident in the global statistics. For instance, the United Nations World Tourism Organization (UNWTO) reported that in 2018 over 1.4 billion tourists (overnight visitors) travelled across the globe generating over USD1.643 trillion in receipts. This represented a 5 percent increase in the number of arrivals (1.3 billion) reported in 2017. Similarly, Africa reported a 7 percent increase in the number of arrivals from around 64 million tourists in to 67 million tourists in 2019 and generating USD194 billion in receipts. This makes Africa the second fastest growing tourist destination in the globe.

Tourism suffered greatest crisis on record in 2020 following an unprecedented health, social and economic emergency amid the outbreak of the COVID-19 pandemic.

International tourist arrivals (overnight visitors) plunged by 74% in 2020 due to widespread travel restrictions and a massive drop in demand.

The collapse in international travel represents an estimated loss of USD 1.3 trillion in export revenues – more than 11 times the loss recorded during the 2009 global economic crisis.

Asia and the pacific saw an 84% decrease in international arrivals in 2020. About 300 million less than in the previous year. The Middle East and Africa both recorded a 75% drop in arrivals declined by 70%, representing over 500 million fewer international tourists, while the America saw a drop of 69%.

To illuminate the potential of the tourism sector in Malawi, this report presents the annual tourism statistics for the year 2020, as well as an analysis of the scope and trends of the industry over 10 years from 2010 to 2020. The report focuses on different parameters, including international tourist arrivals, expenditure, country of residence, purpose of visit, average length of stay, type of accommodation used, mode of transport and visitor demographics.

The Information in this report will provide a basis for decision making, policy formulation as well as programme implementation by multiple stakeholders including government, private sector, the academia, regional and international agencies and the public. It will further provide the relevant platform for investment planning, strategic planning and marketing of tourism; identification of market trends; learning from competitors; understanding the current clientele and identifying new opportunities; and carrying out academic exercises. The statistics in this report was collected from the Department of Immigration and Citizenship and the Department of Tourism.

#  METHODOLOGY

##  Introduction

This report has been produced following the guidelines, definitions and classifications recommended by United Nations Statistical Commission (UNSC) and the United Nations World Tourism Organization (UNWTO).

##  Data Collection

There are two main sources of data which has been used in this report; Department of Tourism and the Department of Immigration and Citizenship.

The Department of Tourism collects room and bed occupancy data on monthly basis, from all licensed accommodation units using a statistical form.

The Department of Immigration and Citizenship provides data of non-residents using exit cards collected both manually and electronically from all gazetted border posts. The Department has automated the busiest border posts which handle high volumes of traffic and is therefore able to provide timely electronic data. Each card captures information on international visitors including, sex, age, nationality, country of residence and purpose of entry among others.

##  Data processing

Completed Exit cards from the non-automated border posts were collected by NSO for sorting. For representativeness, systematic random sampling was employed to select 10 percent of visitor exit cards. The cards were coded and entered in access (database). The data was exported to Stata for merging with electronic data from automated border posts, data cleaning, assigning weights (at port level) and analysis.

The sample for the utilization of accommodation units was used to provide room and bed occupancy estimates at district level. During sampling process, 20 percent of units were randomly selected from each district and the data from the occupancy forms was entered into excel for data cleaning, assigning of weights and analysis.

# CHARACTERISTICS OF INTERNATIONAL VISITORS

## Trend in Total Number of Departing Visitors

The number of international visitors was 198,905 in 2020 compared to 978, 327 visitors reported in 2019. This represents a decrease of 79.7 percent (Figure 1.1).

**Figure 1.1 Trend in Total Number of Departing Visitors, 2011-2020 (‘000)**

*Source: Department of Immigration, Tourism Report, 2020*

##  Departing International Visitors by Sex

Analysis by sex of international visitors that departed Malawi in 2020 shows that 89.2 percent were males and 10.8 percent were females (Figure 1.2).

**Figure 1.2 P****ercentage Distribution of International Visitors by Sex, Malawi 2020.**

*Source: Department of Immigration, Tourism Report, 2020*

##  Departing International Visitors by Age

The results show that 45.5 percent of the visitors who departed Malawi in 2020 were in the age group of 35-49 years, 31.6 percent were in the age group of 25-34 years and 12.6 percent were in the age group of 50 years and above (Figure 1.3).

**Figure 1.3 Percentage Distribution of Departing International Visitors by Age Group, Malawi 2020**

*Source: Department of Immigration, Tourism Report, 2020*

##  Departing International Visitors by Purpose of Visit

Analysis by purpose of visit shows that 80.1 percent of departing visitors came to Malawi for Work or Business, 13.8 percent came to visit family and friends and 6.1 percent visited Malawi for Holiday or Vacation (Figure 1.4).

**Figure 1.4 Percentage Distribution of Departing International Visitors by Purpose of Visit, Malawi, 2020**

*Source: Department of Immigration, Tourism Report, 2020*

##  Main Mode of Transport Used by Departing International Visitors

The results show that most international visitors used road transport (80.2 percent) followed by air transport (19.4 percent) and the least mode of transport was water (0.1 percent) (Figure 1. 5).

**Figure 1. 5 Percentage Distribution of Main Mode of Transport Used by Departing Visitors, Malawi 2020**

*Source: Department of Immigration, Tourism Report, 2020*

## Average Length of Stay (Nights) by Purpose of Travel of Departing Visitors

The average length of stay by international visitors was 7.2 nights. The departing visitors who visited family and friends stayed for an average of 8.1 nights followed by those that went on holiday or vacation at an average of 7.2 nights and the least were those who travelled to do work/business at an average of 7.1 nights (Figure 1.6).

**Figure 1. 6** **Average Length of Stay (Nights) by Purpose of Travel of Departing Visitors, Malawi 2020**

*Source: Department of Immigration, Tourism Report, 2020*

##  Main Type of Accommodation Used by Departing International Visitors

About 35 percent of departing visitors used Private Houses and Hotels/Inns/Lodges each, 19.1 percent were accommodated in Rest Houses and 10.7 percent in other types of accommodation (Figure 1.1).

**Figure 1.7: Percentage Distribution of Main Type of Accommodation Used by Departing International Visitors, Malawi 2020**

*Source: Department of Immigration, Tourism Report, 2020*

##  Departing Visitors by Continent of Residence

Analysis by continent of residence shows that the highest number of departing international visitors were from Africa (92.8 percent), followed by Europe (3.2 percent), Asia (2.1 percent) and America (1.8 percent) (Figure 1.8).

**Figure 1.8: Percentage Distribution of Departing Visitors by Continent of Residence, Malawi 2020**

*Source: Department of Immigration, Tourism Report, 2020*

## Departing International Visitors by Country of Residence

The highest number of departing international visitors were from United Republic of Tanzania (74,468) followed by Zambia (33,819), Mozambique (13,302), Zimbabwe (7,150), South Africa (1,757) and Kenya (1,520) ( Table 1).

**Table 1: Departing International Visitors by Top 10 Country of Residence, Malawi 2020**

|  |  |
| --- | --- |
| **Country** |  **Number** |
| United Republic of Tanzania | 74,468 |
| Zambia | 33,819 |
| Mozambique | 13,302 |
| Zimbabwe | 7,150 |
| South Africa | 1,757 |
| Kenya | 1,520 |
| Uganda | 1,396 |
| India | 853 |
| United States of America | 598 |
| Australia | 582 |

*Source: Department of Immigration, Tourism Report, 2020*

## Total Expenditure by Purpose of Visit

Total expenditure by international visitors in 2020 was MWK3.3 billion. Analysis by purpose of visit shows that highest expenditure was made on Work or Business (MWK2.7 billion) followed by Holiday or Vacation (MWK0.4 billion) and the least was on Visiting Friends or Relatives at MWK0.2 billion (Figure 1.9).

**Figure 1.9 Total Expenditure by Purpose of Visits (MWK ‛000 000 000’), Malawi 2020**

*Source: Department of Immigration, Tourism Report, 2020*

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# ACCOMODATION UTILIZATION

##  Average and Monthly Room and Bed Occupancy Rates for Malawi

The results show that an average of 15.6 percent of the rooms were occupied and an average of 13.0 percent of beds were occupied. Room occupancy rate was high in the month of February at 27.8 percent and low in April at 7.3 percent each while bed occupancy rate was high in the month of February at 19.0 and low in April at 6.2 percent each (Table 2).

**Table 2*:* Average and Monthly Room and Bed Occupancy Rates for Malawi, 2020**

|  |  |  |
| --- | --- | --- |
|  |  Room Occupancy (%) | Bed Occupancy (%) |
| Average | 15.6 | 13.0 |
| January | 20.9 | 18.9 |
| February | 27.8 | 19 |
| March | 17.5 | 13.2 |
| April | 7.3 | 6.2 |
| May | 8.9 | 7.5 |
| June | 12.8 | 10.2 |
| July | 11.2 | 9.6 |
| August | 10.8 | 9.6 |
| September | 13.8 | 11.5 |
| October | 15.8 | 14.1 |
| November | 18.6 | 15.8 |
| December | 18.9 | 17.1 |

*Source: Department of Tourism*

**Inbound Tourism Report, 2019**

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**INTEGRATED HOUSEHOLD PANEL SURVEY 2016-2019**

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