



UNLOCKING THE MALAWI MARKET

BY SAT INSIGHTS UNIT
(Based on 2025 Data & Insights)



SOUTH AFRICAN TOURISM



SAT MPIF Primary Source Markets

Secondary Markets: Angola; DRC; Ghana; Tanzania; Ethiopia



POPULATION (2025 Est.)

25.2 million

LAND MASS

118 484 km²

Blantyre
2 hour 11 minutes
(Johannesburg direct)

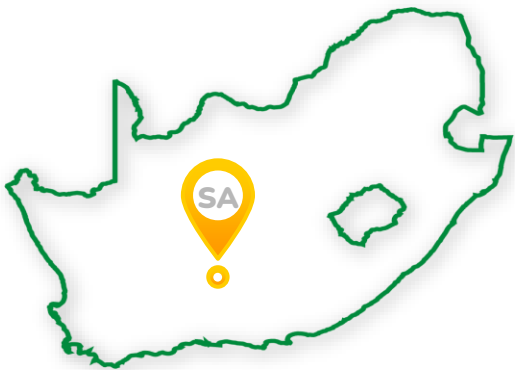
Lilongwe
2 hour 20 minutes
(Johannesburg direct)

86 % of arrivals to South Africa occur by land.

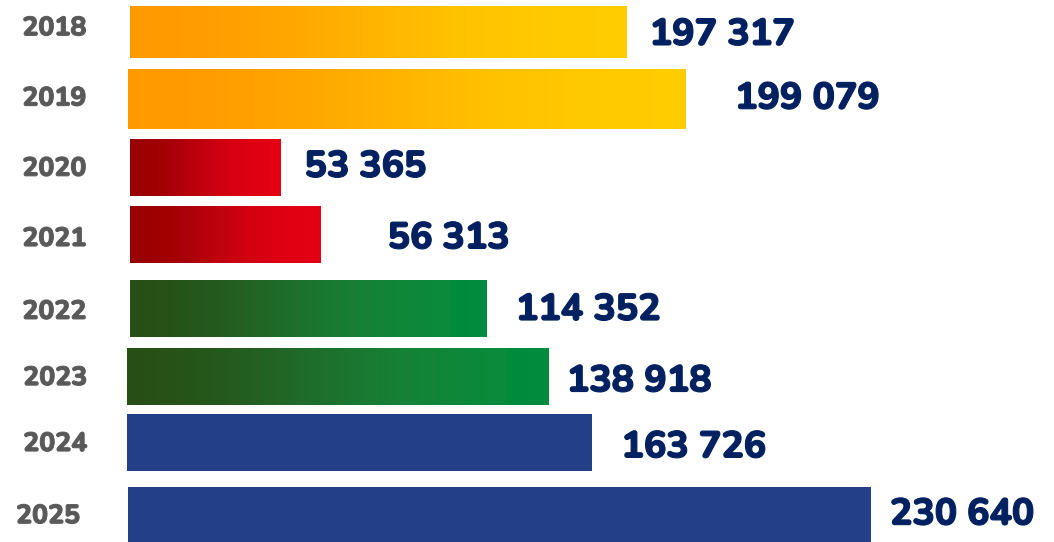
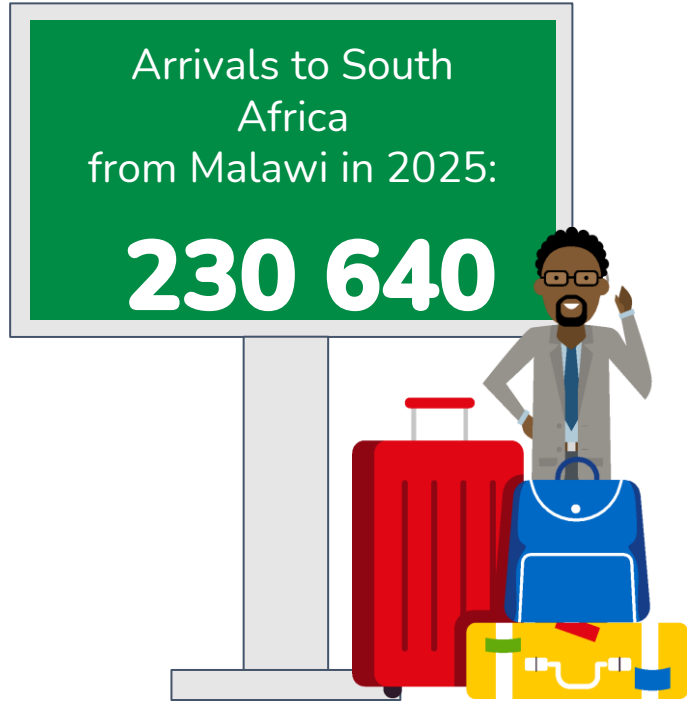
Malawi facts



Malawi's outbound travel for 2025 is estimated at **1.02 million**. South Africa has a Market Share of **23%**.



Malawi travel trends



Growth Rate (2024 vs 2025): 41%

In 2025, total foreign direct spend from the Malawian source market amounted to **R4,8 billion**, a year-on-year increase of 41,1%. The average spend per visitor increase of 2,4%, increasing to **R21,500**.

Profile of Malawi arrivals



Purpose of visit: **VFR** and **business shopping**, as well as **holiday**.



Length of stay: 13 days



Gauteng is the #1 destination, followed by the Western Cape.



Mostly travel **alone**.



Most likely to be **Male**.



More likely to be **repeat travellers** than first-time visitors.

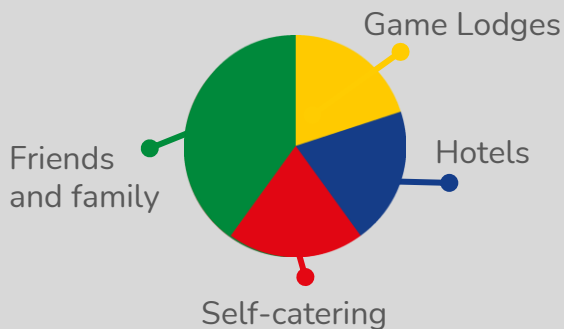
> 31
< 50

Mostly **31 to 50** age brackets.

± **R21 500**

On average, they spend **R21 500** per tourist

Where do Malawian travellers mostly stay?



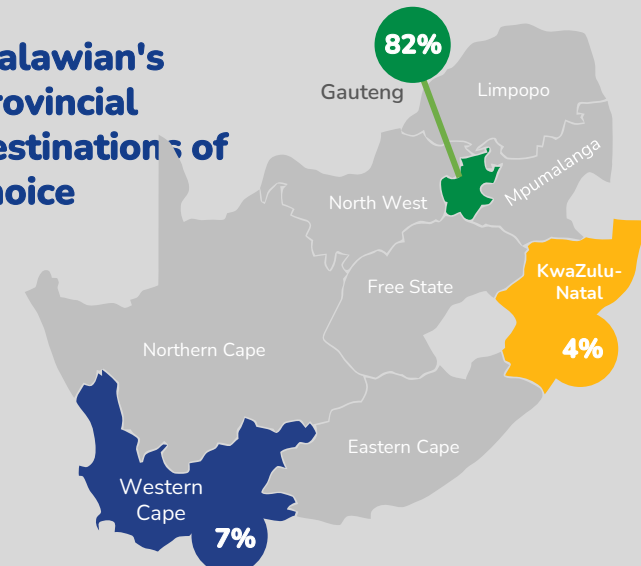
Malawian's preferred activities



Malawian's preferred attractions

Eastgate Mall
V&A Waterfront
Sandton City / Mandela Square

Malawian's provincial destination of choice



Brand Performance and Travel Behaviour

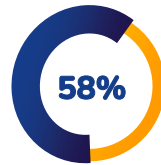
How first Malawians became aware of South Africa (Top 3)

- Read an article on a website describing the country
- Used a search Engine
- Read about or saw photos of South Africa on community sites

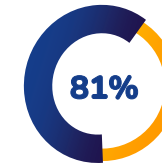


9% recall seeing advertisements about South Africa

How they plan and finalise trips to SA



50% Start planning about the destination less than a month before the trip.



81% finalise their trip to the destination less than a month before the trip.



Reasons for Visiting South Africa for Leisure

- Value for money
- Fulfil a dream
- Combined with Business trip



Reasons for Visiting South Africa for Leisure

- Another appealing Destination
- Concerns for personal safety
- Too much time to get there

South Africa's Top 4 Competitors in Malawi



Tanzania



Mauritius



Botswana



UAE

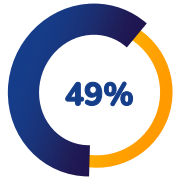


South Africa is the Malawi's **#3 market** for offering excellent value for the money

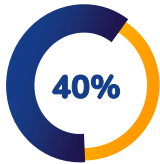


South Africa is the Malawi's **#10 market** for offering a wildlife experience

Role of Media Channels



49% rely on **Social media/ instant messaging services** when selecting a destination



40% use **Travel agent/tour operators** to make their travel bookings



Channels used when selecting a destination (Top 5)



35%
Friends/family



49%
Social media/
instant
messaging
services



31%
Travel agent/tour
operators



20%
Website of the
airline/hotel



19%
Online news,
articles, blogs, etc.

Channels used/referred to when booking a trip (Top 5)



40%
Travel
agent/tour
operators



38%
Social media/
instant messaging
services



33%
Friends/family



24%
Website of the
airline/hotel



18%
Online news,
articles, blogs, etc.

Role of Media Channels



Channels used to share details of holiday experiences during trips



Channels used to share holiday experiences after trips



Opportunities that would speak to the Malawian market



BROADENING MY HORIZONS AND CONNECTIONS

They feel exhilarated by pushing themselves and seeing the opportunities at a destination and always looking for networking with new people that can help them expand the legacy they building.



REST & RELAXATION

They need that leisurely pace to really feel like refreshed and renewed. To be able to immerse in a destination and not to be restricted and try out things they don't get to do at home.



FAMILY BONDS

Travel is a time to bond, connect and spend precious moments with the ones they love and those that are close to them.



MAKE ME FEEL SPECIAL

When they travel, they want to get their money's worth. They have high expectations of the destinations they visit.



PACK IT ALL IN

The variety of options and price points allows them to find what is within reach. They want to have fun, feel welcomed, experience new places and be entertained; all in one trip



NATURE IS REJUVENATING

Malawians are drawn to and appreciate nature and water; they find it relaxing and rejuvenating.



SOUTH AFRICAN TOURISM

Prepared by the Insights Unit
South African Tourism
Bojanala House
90 Protea Road, Chislehurst, 2196
Tel: +27 11 895 3000

