Malawi

The Travel & Tourism Competitiveness Index

<table>
<thead>
<tr>
<th>Rank (out of 141)</th>
<th>Score (1–7)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel &amp; Tourism Competitiveness Index</td>
<td>126</td>
</tr>
</tbody>
</table>

Enabling Environment ........................................ 120 | 3.72 |
Business Environment ..................................... 105 | 4.03 |
Safety and Security ........................................ 67 | 5.41 |
Health and Hygiene ........................................... 139 | 2.44 |
Human Resources and Labour Market ......................... 101 | 4.18 |
ICT Readiness .................................................. 120 | 2.55 |

T&T Policy and Enabling Conditions .......................... 126 | 3.54 |
Prioritization of Travel & Tourism .......................... 127 | 3.46 |
International Openness ........................................ 121 | 2.03 |
Price Competitiveness ........................................ 67 | 4.69 |
Environmental Sustainability ................................ 75 | 4.01 |

Infrastructure .................................................. 132 | 2.22 |
Air Transport Infrastructure ................................ 139 | 1.51 |
Ground and Port Infrastructure .............................. 115 | 2.62 |
Tourist Service Infrastructure ............................... 127 | 2.54 |

Natural and Cultural Resources ............................... 85 | 2.12 |
Natural Resources ............................................... 66 | 2.93 |
Cultural Resources and Business Travel .................... 109 | 1.30 |

Travel & Tourism Key Indicators and Economic Impact

Int’l tourist arrivals (thousands), 2013 ................. 770
Int’l tourism receipts (inbound US$ millions), 2013 .... 34.0
Growth (%) in int’l outbound travel spending* ................... n/a
Average spending per int’l tourist (US$), 2013 .......... 44.2
Population (millions), 2013 .................................. 16.4
Surface area (1,000 square kilometres), 2013 .......... 118.5
Gross domestic product per capita (PPP$), 2013 .... 748
Real GDP growth (%), 2013 .................................. 5.2

T&T industry economic impact, 2014 estimates

<table>
<thead>
<tr>
<th>Absolute value</th>
<th>Percent of total</th>
<th>Growth forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>T&amp;T industry GDP (US$ millions)</td>
<td>187.6</td>
<td>4.5</td>
</tr>
<tr>
<td>T&amp;T industry employment (1,000 jobs)</td>
<td>135.6</td>
<td>3.8</td>
</tr>
</tbody>
</table>

Evolution of the T&T Industry Over Time

Note: For further details and explanation, please refer to the section “How to Read the Country/Economy Profiles” on page 67.

* CAGR 2008-2013.
## The Travel & Tourism Competitiveness Index in detail

### INDICATOR | VALUE | RANK/141
--- | --- | ---
**Business Environment** | | |
1.01 Property rights | 4.0 | 105
1.02 Impact of rules on PDI | 3.9 | 83
1.03 Efficiency of legal framework settling disputes | 3.7 | 72
1.04 Efficiency of legal framework challenging regs | 3.6 | 49
1.05 No. of days to deal with construction permits | 153 | 74
1.06 Construction permits cost (%) | 1.2 | 56
1.07 Extent of market dominance | 3.1 | 122
1.08 No. of days to start a business | 38 | 123
1.09 Cost to start a business (% GNI/capital) | 94.1 | 133
1.10 Effect of taxation on incentives to work | 3.3 | 98
1.11 Effect of taxation on incentives to invest | 3.3 | 102
1.12 Total tax rate (% profit) | 35.5 | 63
1.12a Labour and contributions tax rate (% profit) | 12.4 | 51
1.12b Profit tax rate (% profit) | 20.4 | 94
1.12c Other taxes rate (% profit) | 2.6 | 80
**Safety and Security** | 5.4 | 67
2.01 Business costs of crime and violence | 3.6 | 109
2.02 Reliability of police services | 4.0 | 82
2.03 Business costs of terrorism | 5.7 | 47
2.04 Index of terrorism incidence | 7.0 | 1
2.05 Homicide rate | 2.2 | 45
**Health and Hygiene** | 2.4 | 139
3.01 Physician density per 1,000 pop | 0.0 | 139
3.02 Access to improved sanitation (% pop) | 10.0 | 141
3.03 Access to improved drinking water (% pop) | 85.0 | 105
3.04 Hospital beds per 10,000 pop | 13.0 | 102
3.05 HIV prevalence (% pop) | 10.8 | 133
3.06 Malaria incidence per 100,000 pop | 27,661.7 | 69
**Human Resources and Labour Market** | 4.2 | 101
4.01 Primary education enrolment rate (%)| 96.9 | 46
4.02 Secondary education enrolment rate (%)| 34.2 | 130
4.03 Extent of staff training | 4.0 | 65
4.04 Treatment of customers | 4.0 | 107
4.05 Hiring and firing practices | 3.6 | 89
4.06 Ease of finding skilled employees | 3.9 | 73
4.07 Ease of hiring foreign labour | 3.8 | 94
4.08 Pay and productivity | 4.0 | 60
4.09 Female labour force participation (% to men) | 1.0 | 1
**ICT Readiness** | 2.5 | 120
5.01 ICT use for B2B transactions | 4.1 | 111
5.02 Internet use for B2C transactions | 3.3 | 126
5.03 Individuals using internet (%| 5.4 | 128
5.04 Broadband internet subs. per 100 pop | 0.0 | 133
5.05 Mobile telephone subs. per 100 pop | 32.3 | 138
5.06 Mobile broadband subs. per 100 pop | 3.9 | 111
5.07 Mobile network coverage (% pop) | 99.6 | 57
5.08 Quality of electricity supply | 2.9 | 111
**Prioritization of Travel & Tourism** | 3.5 | 127
6.01 Government prioritization of T&T industry | 4.7 | 98
6.02 T&T govt expenditure (% govt budget) | 1.4 | 123
6.03 Effectiveness of marketing to attract tourists | 3.8 | 110
6.04 Comprehensiveness of T&T data (0–120 best) | 56.0 | 88
6.05 Timeliness of T&T data (0–21 best) | 0.0 | 129
6.06 Country Brand Strategy rating (1–10 best) | 61.5 | 97

### INDICATOR | VALUE | RANK/141
--- | --- | ---
**International Openness** | | |
7.01 Visa requirements (0–100 best) | 18.0 | 114
7.02 Openness of bilateral ASA (0–38) | 9.8 | 82
7.03 No. of regional trade agreements in force | 2.0 | 113
**Price Competitiveness** | 4.7 | 67
8.01 Ticket taxes, airport charges (0–190 best) | 79.3 | 71
8.02 Hotel price index (US$) | n/a | n/a
8.03 Purchasing power parity | 0.3 | 3
8.04 Fuel price levels (US$ cents/litre) | 193.0 | 120
**Environmental Sustainability** | | |
9.01 Stringency of environmental regulations | 3.2 | 116
9.02 Enforcement of environmental regulations | 3.3 | 108
9.03 Sustainability of T&T development | 3.8 | 108
9.04 Particulate matter (2.5) concentration (µg/m³) | 5.0 | 29
9.05 No. of env't treaty ratifications (0–27 best) | 19 | 73
9.06 Baseline water stress (0–100 best) | 0.0 | 44
9.07 Threatened species (% total species) | 3.4 | 40
9.08 Forest cover change (% average per year) | 7.9 | 106
9.09 Wastewater treatment (%) | 0.0 | 119
9.10 Coastal shelf fishing pressure (tonnes per km²) | n/a | n/a
**Air Transport Infrastructure** | 1.5 | 139
10.01 Quality of air transport infrastructure | 2.8 | 131
10.02 Airline dom. seat kms per week (millions) | n/a | n/a
10.03 Airline int'l seat kms per week (millions) | 9.1 | 135
10.04 Depatures per 1,000,000 pop | 0.1 | 127
10.05 Airport density per million urban pop | 0.8 | 94
10.06 No. of operating airlines | 5.0 | 136
**Ground and Port Infrastructure** | 2.6 | 115
11.01 Quality of roads | 3.3 | 99
11.02 Quality of railroad infrastructure | 1.9 | 88
11.03 Quality of port infrastructure | 2.6 | 130
11.04 Quality of ground transport network | 4.3 | 76
11.05 Railroad density (km/surface area) | 0.7 | 59
11.06 Road density (km/surface area) | 0.3 | 106
11.07 Paved road density (km/surface area) | 0.3 | 88
**Tourist Service Infrastructure** | 2.5 | 127
12.01 Hotel rooms per 100 pop | 0.2 | 101
12.02 Extension of business trips recommended | 5.1 | 89
12.03 Presence of major car rental companies | 1.0 | 120
12.04 ATMs accepting Visa cards per million pop | 113.8 | 110
**Natural Resources** | 2.9 | 66
13.01 No. of World Heritage natural sites | 1.0 | 43
13.02 Total known species | 90.1 | 41
13.03 Total protected areas (% total territorial area) | 18.3 | 47
13.04 Natural tourism digital demand (0–100 best) | 6 | 97
13.05 Quality of the natural environment | 4.4 | 73
**Cultural Resources and Business Travel** | 1.3 | 109
14.01 No. of World Heritage cultural sites | 1.0 | 92
14.02 No. of oral and intangible cultural expressions | 3.0 | 32
14.03 No. of large sports stadiums | 2.0 | 98
14.04 No. of international association meetings | 3.0 | 113
14.05 Cult./entert. tourism digital demand (0–100 best) | 2.0 | 117

Notes: Ranks of notable competitive advantages are highlighted in blue. A legend for the symbols ®, † and * is provided in the section "How to Read the Country/Economy Profiles" on page 67.