



MINISTRY OF ENVIRONMENT,  
CLIMATE, TOURISM AND  
HOSPITALITY INDUSTRY



**UNWTO**  
World Tourism Organization

# TOURISM SATELLITE ACCOUNT FOR ZIMBABWE

Prepared for the Year 2018



MINISTRY OF ENVIRONMENT,  
CLIMATE, TOURISM AND  
HOSPITALITY INDUSTRY



# Tourism Satellite Account for Zimbabwe

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## ABBREVIATIONS

<b>DOTS</b>	Domestic and Outbound Tourism Survey	<b>TIR</b>	Tourism Industry Ratio
<b>GDP</b>	Gross Domestic Product	<b>TPR</b>	Tourism Product Ratio
<b>GVATI</b>	Gross Value Added of the Tourism Industry	<b>TSA</b>	Tourism Satellite Account
<b>IRTS</b>	International Recommendations for Tourism Statistics	<b>TSA: RMF</b>	Tourism Satellite Account: Recommended Methodological Framework
<b>MECTHI</b>	Ministry of Environment, Climate, Tourism and Hospitality Industry	<b>UNSC</b>	United Nations Statistical Commission
<b>NTA</b>	National Tourism Administration	<b>UNWTO</b>	World Tourism Organization
<b>SDG</b>	Sustainable Development Goals	<b>USD</b>	United States Dollar
<b>SEEA</b>	System of Environmental-Economic Accounting	<b>VES</b>	Visitor Exit Survey
<b>SNA</b>	System of National Accounts	<b>ZIMSTAT</b>	Zimbabwe National Statistics Agency
<b>SUT</b>	Supply and Use Table	<b>ZTA</b>	Zimbabwe Tourism Authority
<b>TDGDP</b>	Tourism Direct Gross Domestic Product	<b>ZTDC</b>	Zimbabwe Tourist Development Corporation
<b>TDGVA</b>	Tourism Direct Gross Value Added		

## FOREWORD

I am pleased, on behalf of the Government of the Republic of Zimbabwe, that we now have the first ever Tourism Satellite Account (TSA) for Zimbabwe. The TSA is an internationally acclaimed tool for the measurement of tourism, as contribution to the Gross Domestic product, trade and employment in an economy and is in line with the United Nations adopted statistical standard.

This inaugural TSA is most welcome by the sector and the Nation at large as a tool to guide decision making and support evidence-based policy formulation, for a sustainable and resilient tourism sector. It provides us with critical information of the sector's contribution to the economy in terms of expenditure and employment, and is therefore critical to Policy formulation. More importantly this data will help us with an important benchmark to use in measuring the tourism impact during and after the Covid-19 era.

Key to note is that the reference period of this TSA is 2018. The choice of 2018 was informed by the fact that from 2019 onwards, the National currency changed from USD to the Zimbabwe Dollar. Domestic tourism remains low, it accounted for USD765 724 073 in 2018 compared to USD1 198 868 807 for inbound tourism expenditure. This gave us a total internal tourism consumption value of USD1 198 868 807. On this basis, the total value of the tourism economy was estimated as USD1 964 592 880, which gives us a working target of growing the tourism sector by almost two-fold to reach our target of a US 5 billion tourism economy by 2025. A key indication from the TSA report before you, is that tourism employed 99 100 people and this translates into 1.56% of the whole employment workforce nationally (2018).

Going forward, a key challenge for the country to tackle is the imperative for a solid system of Tourism Statistics that delivers the data sources for the production of the TSA. To that end, we will need

to continuously invest in periodic tourism surveys that generate data for a robust TSA namely the Visitor Exit Survey and the Domestic Tourism and Outbound Survey.

Given the low contribution of domestic tourism as identified in this report, it is important that sustained efforts continue to be channelled to promote domestic tourism, and therefore increased internal tourism consumption. Relatedly, given the glaring fact that most people are not using formal accommodation when they visit the country, our regulator, the Zimbabwe Tourism Authority must intensify efforts to license all tourism players and my Ministry will initiate the Ease of Doing Business review to do a diagnostic of this aspect and any others that may be hindering tourism growth in Zimbabwe.

Finally, I am glad to avail to you the TSA findings, the first of its kind in Zimbabwe, developed using the agreed International Standards and UNWTO Tourism Satellite Accounting framework and guidelines. It is my sincere hope that the results of this TSA will provide evidence-based decision making and go a long way in informing policy formulation to guide the sectors contribution towards an upper middle-income society by 2030.



A handwritten signature in black ink, which appears to read "N. M. Ndhlovu". The signature is written in a cursive, flowing style.

**Hon N. M. Ndhlovu (MP)**

Minister of Environment, Climate, Tourism and  
Hospitality Industry



## FOREWORD

The International Finance Corporation (IFC) and the World Tourism Organization (UNWTO) are pleased to have partnered to support the Government of Zimbabwe in the production of its first Tourism Satellite Account (TSA), designed to measure the size and economic contribution of the country's tourism sector.

In addition to data on the number of tourists visiting the country, the TSA also includes monetary and non-monetary tourism data related to demand and supply; the value of expenditure on goods and services across all types of tourism, and the value of tourism/related industries producing goods and/or services.

The comprehensive TSA will help Zimbabwe quantify tourism's contribution to Gross Domestic Product (GDP) and employment. At the same time, it will offer policymakers and stakeholders insights related to tourism, provide information on employment in the tourism sector, and provide a frame of reference for calculating impact and other analytical economic tourism models.

Tourism has long been a critical driver of Zimbabwe's economy and the country boasts many magnificent sights that attract visitors from around the world. By addressing information gaps and supporting a data-driven approach to policy development and investment decisions, the TSA should prove particularly relevant to Zimbabwe's tourism sector as it recovers and grows back from the impacts of the COVID-19 pandemic.

Through a methodology developed by UNWTO over several years, the TSA generates a set of accounts that are aligned with national accounting principles and are internationally compatible.

IFC's support for the TSA is part of our strategy to help the Government of Zimbabwe increase private sector investment and create a more business-friendly environment.

The TSA was produced by the Government of Zimbabwe with technical support from IFC and UNWTO. It was funded through IFC's ZDDP, a technical assistance program supporting Zimbabwe tourism sector's recovery and growth post COVID-19. ZDDP is in turn funded by IFC and the Government of Japan.

IFC and UNWTO are keenly aware of the value of a TSA to measure and account for economic impact across the diverse and cross-cutting tourism sector and we are proud to have supported such a meaningful endeavor.

We look forward to the successful application of this data in driving sustainable tourism growth in Zimbabwe.



*Adamou Labara*

**Adamou Labara**

IFC Country Manager,  
Zimbabwe



**Zurab Pololikashvili**

UNWTO Secretary  
General



## PREFACE

The National Tourism Satellite Account (NTSA) for the year 2018 is a maiden report to be compiled for Zimbabwe although tourism related statistics have been compiled by the Zimbabwe National Statistics Agency (ZIMSTAT) since the 1960s. A Tourism Satellite Account (TSA) is defined as an accounting procedure designed to measure goods and services associated with the activity of tourism undertaken within the boundary of a country or a region over a defined period of time. ZIMSTAT in cooperation with the Ministry of Environment, Climate, Tourism and Hospitality Industry, the International Finance Corporation (IFC), the World Tourism Organization (UNWTO) and a Technical Working Group worked together and constructed a Tourism Satellite Account for Zimbabwe.

The Technical Working Group consisted of members from the Ministry of Environment, Climate, Tourism and Hospitality Industry, Ministry of Finance and Economic Development, Zimbabwe National Statistics Agency, Zimbabwe Tourism Authority, Reserve Bank of Zimbabwe, Department of Immigration, and Zimbabwe Parks and Wildlife Management Authority.

In order to compile the TSA, data was collected from various sources such as Inbound Tourism Survey, also known as Visitor Exit Survey (VES), Domestic and Outbound Tourism Survey (DOTS), Supply and Use Tables and other secondary sources.

The objectives of the Tourism Satellite Account are to provide data on the following variables:

- a) contribution of tourism to the economy's GDP,
- b) size of the tourism industry relative to other sectors of the economy,
- c) number of jobs generated by tourism,

- d) value of public and private investment related to tourism,
- e) effect of international tourism on the country's balance of payments and
- f) value of income generated by tourism in the country.

Tourism, unlike 'conventional' industries such as mining or manufacturing that are classified in accordance with goods and services produced, is defined by the characteristics of the customer demanding tourism products. Since tourism products cut across standard industry definitions, a different approach is required to measure tourism effectively.

A Tourism Satellite Account (TSA) therefore integrates data from the supply and use tables of tourism related goods and services into a single format. Furthermore, it provides a summary measure of tourism contribution to production and employment, which will be integrated with official national accounts. The Zimbabwean Tourism Satellite Account (ZIMTSA), also measures expenditure in Zimbabwe by resident and non-resident tourists, and thus gives a picture of the overall size of the tourism industry, including its contribution to GDP and employment.

ZIMSTAT is grateful for the immense support received from members of the TSA Technical Working Group, Ministry of Environment, Climate, Tourism and Hospitality Industry and the World Tourism Organization. This cooperation remains critical going into the future and for which as ZIMSTAT we will always be grateful to.



**Taguma Mahonde**

Director-General Zimbabwe National Statistics Agency



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## ACKNOWLEDGEMENTS

The journey for the Tourism Satellite Account (TSA) development in Zimbabwe has been an exciting one. It commenced with capacity building training programmes offered by the World Tourism Organization (UNWTO), and the then Regional Tourism Organisation for Southern Africa (RETOSA) between 2013 and 2015. The training received helped the Technical Teams gain theoretical appreciation of the development of TSA. This was strengthened by benchmarking visits to countries with well-established TSAs such as South Africa, Mauritius and Mozambique.

Armed with the above exposure, we were able to carry out two major surveys namely; the Visitor Exit Survey (VES), which was carried out during the period 2015 to 2016 at 10 Ports of Exit, and the Domestic and Outbound Tourism Survey undertaken during the period 2017 – 2018. The data from these two Surveys complimented by data from other relevant sources made it possible for the development of this first ever TSA for Zimbabwe.

Tribute goes to the team which was instrumental in the development of this inaugural Zimbabwe Tourism Satellite Account. The team was led by the Zimbabwe National Statistical Agency (ZIMSTAT), and also had members drawn from key line Ministries and Organisations namely Ministry of Environment, Climate, Tourism and Hospitality Industry, Ministry of Finance and Economic Development; the Zimbabwe Tourism Authority; the Department of Immigration Control, the Reserve Bank of Zimbabwe (RBZ), and the Zimbabwe Parks and Wildlife Management Authority.

On behalf of the Government of Zimbabwe, I wish to express our appreciation to the cooperating partners who gave support both financial and technical namely; the African Development Bank (AfDB); the International Finance Corporation (the private sector arm of the World Bank); and the World Tourism Organization (UNWTO).

Our special gratitude is further extended to visitors and the households who co-operated during the fieldwork surveys.

It is through your valuable inputs that Zimbabwe has been able to produce its first ever Tourism Satellite Account, signalling not just clarity of vision, but real efforts at using imperial data to give true value to our tourism. This is a critical ingredient towards sound policy formulation.

This first-ever Tourism Satellite Account for Zimbabwe lays a strong foundation for sound policy decision making based on empirical evidence.



**Munesushe Munodawafa** (Mr)

Permanent Secretary

Ministry of Environment, Climate, Tourism and Hospitality Industry

# GLOSSARY



## **Domestic Tourism**

The tourism of resident visitors within the economic territory of the country of reference. It comprises the activities of a resident visitor within the country of reference either as part of a domestic tourism trip or as part of an outbound tourism trip.

## **Domestic Tourism Consumption**

Consists of the tourism consumption by resident visitors on tourism-related products within the economy.

## **Domestic Trip**

A domestic trip is one with main destination within the country of residence of the visitor.

## **Excursionist**

The visitor whose trip does not include an overnight stay is referred as excursionist or day-visitor or same-day visitor.

## **Gross Domestic Product**

Gross Domestic Product is the sum of the Gross Values Added of all resident producers at basic prices, plus all taxes less subsidies on products. Output-based GDP is the sum of the Gross Values Added of all resident producers at producers' prices, plus taxes less subsidies on imports, plus all non-deductible VAT (or similar taxes).

## **Gross Value Added**

Gross Value Added is the value of output less the value of intermediate consumption; it is a measure of the contribution to GDP made by an individual producer, industry or sector

## **Inbound Tourism**

Inbound tourism comprises the tourism of non-resident visitors within the economic territory of the country of reference.

## **Inbound Tourism Consumption**

Inbound tourism consumption is the tourism consumption of a non-resident visitor within the country of reference.

## **Internal Tourism**

This comprises domestic tourism and inbound tourism, that is, the activities of resident and non-resident visitors within the country of reference as part of domestic or international tourism trips.

## **Internal Tourism Consumption**

Internal tourism consumption is the tourism consumption of both resident and non-resident visitors within the economy of reference. It is the sum of domestic tourism consumption and inbound tourism consumption.

## **Main Destination**

The main destination of a tourism trip is defined as the place visited that is central to the decision to take the trip.

## **Main Purpose of a Trip**

The main purpose of a trip is defined as the purpose in the absence of which the trip would not have taken place. The main purpose of a trip is one of the criteria used to determine whether the trip qualifies as a tourism trip and the traveller qualifies as a visitor. If the main purpose is to be employed and earn income (compensation for the labour input





provided), then the trip cannot be a tourism trip and the individual taking the trip cannot be considered as a visitor (even though it is outside his/her usual environment and for less than 12 months), but is seen as an “other traveller”.

### **National Tourism**

This comprises domestic tourism and outbound tourism, that is, the activities of resident visitors within and outside the country of reference, either as part of domestic or outbound tourism trips.

### **Nationality**

Nationality is as indicated in the traveller’s passport (or other identification document). The country of residence has to be determined by means of a question (usually the indication of the current home address, although this might not be sufficient). It is recommended that travellers (and visitors) be classified on the basis of their country of residence

### **Outbound Tourism**

The travel of outbound visitors is called outbound tourism. It comprises the activities of a resident visitor outside the country of reference, either as part of an outbound tourism trip or as part of a domestic tourism trip.

### **Outbound Tourism**

Consumption Outbound tourism consumption is the tourism consumption of a resident visitor outside the economy of reference. It is also referred to as tourism imports. It consists of the tourism consumption by resident visitors outside of the economy while on an international trip.

### **Outbound Trip**

An outbound trip is one with a main destination outside the country of residence of the visitor.

### **Overnight Visitor**

A visitor (domestic, inbound or outbound) is classified as a an overnight visitor or a tourist if his/ her trip includes an overnight stay

### **Supply**

The supply of a good or service is the sum of the values of its domestic output (from all sectors), plus imports, when measured at basic prices. At purchasers’ prices, trade and transport margins and net taxes on products are also added.

### **Supply Table**

The main body of the Supply Table shows estimates of domestic industries’ output by type of product at basic prices. The columns represent the supplying industries and the rows represent the products supplied.

### **Supply and Use Tables**

Supply and use tables are in the form of matrices that record how supplies of different kinds of goods and services originate from domestic industries and imports, and how those supplies are allocated between various intermediate or final uses, including exports.

### **Tax on a Product**

A tax on a product is a tax that is payable per unit of some good or service, either as a specified amount of money per unit of quantity or as a specified percentage of the price per unit or value of the good or service transacted.





### **Tourism**

This comprises the activities of visitors – both overnight and day-visitors.

### **Tourism Characteristic Industries**

These are industries that would either cease to exist in their present form, producing their present product(s), or would be significantly affected if tourism were to cease.

### **Tourism Connected Industries**

These are industries, other than tourism-characteristic industries, for which a tourism related product is directly identifiable (primary) to, and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer. All other industries are classified as non-tourism industries, though some of their products may be consumed by visitors and are included in the calculation of Direct Tourism Gross Value Added and Direct Tourism GDP.

### **Tourism Direct Gross Domestic Product (TDGDP)**

Tourism Direct Gross Domestic Product is the sum of the part of Gross Value Added (at basic prices) generated by all industries in response to internal tourism consumption plus the amount of net taxes on products and imports included within the value of this expenditure at purchasers' prices.

### **Tourism Direct Gross Value Added (TDGVA)**

Tourism Direct Gross Value Added is the part of Gross Value Added generated by tourism industries and other industries of the economy that serve visitors directly in response to internal tourism consumption.

### **Tourism Expenditure**

The amount paid for the acquisition of consumption goods and services as well as valuables, for own use or to give away, for and during tourism trips is known as tourism expenditure. It includes expenditures by visitors themselves as well as expenses that are paid for or reimbursed by others.

### **Tourism Industry Ratio**

This is the proportion of the total value added of an industry which is related to tourism.

### **Tourism Product Ratio**

This is the proportion of the total supply of a product which is consumed by visitors.

### **Tourism Satellite Account**

Tourism Satellite Account is an accounting procedure designed to measure goods and services associated with the activity of tourism undertaken within the boundary of a country or a region or a state.



Intondolo Safaris and Tours - Guided Tour of Victoria Falls

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### **Tourist**

A visitor (domestic, inbound, or outbound) is classified as a tourist (or overnight visitor) if his/her trip includes an overnight stay.

### **Usual Environment**

This refers to the geographical area (though not necessarily a contiguous one) within which an individual conducts his/her regular life routines. This is made up of one or more areas in which a person undertakes their regular activities such as their residence, place of work, place of study, and other places frequently visited. The usual environment criteria has two dimensions—frequency (places that are visited on a routine basis) and distance (locations close from home for overnight trips).

### **Visitor**

A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips taken by visitors qualify as tourism trips. Tourism refers to the activity of visitors. A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor) if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise.





## EXECUTIVE SUMMARY

The Tourism Satellite Account (TSA) is an accounting procedure designed to measure goods and services associated with the activity of tourism undertaken within the boundary of a country or a region or a state. For most of the economies, the readily available tourism statistics relate to the number of tourist arrivals or tourist visits but a TSA is not just a compilation of statistics on tourism flows but also of monetary and non-monetary data on tourism related to both demand side and the supply side.

This report presents the first ever TSA for Zimbabwe, prepared for the reference year of 2018. The key highlights of this study are the following:

### Inbound Tourism

- The Visitor Exit Surveys (VES) are conducted to collect the data on Inbound Tourism Expenditure incurred by international overnight and same-day tourists in Zimbabwe. Zimbabwe's first TSA is based on VES-2015-16.
- The survey finds that a majority of inbound tourists were from Africa (80.7 percent), followed by 9.8 percent from Europe, 5.7 percent from Americas, 2.0 percent from Oceania and just 1.7 percent from Asia.
- Within Africa, tourists from South Africa accounted for the maximum, that is, 38.1 percent.
- About 43.1 percent of the tourists reported to be travelling alone, while 26.1 percent travelled with families.
- A majority of tourists (34.2 percent) used buses/coaches as the mode of transport to enter the country. About 18.8 percent came by air.
- The average length of stay for overnight tourists was 8.6 nights. Figure 1 presents the average length of stay by tourist's place of origin.
- About 31.1 percent of the tourists travelled for social purpose or the purpose of visiting friends and relatives. Only 18.2 percent of the tourists travelled for holiday or leisure purpose.
- With regard to type of accommodation availed by the tourists, as many as 42 percent did not utilise any accommodation. These included excursionists and visitors who slept in coaches/buses, trucks, cars, churches etc. Another significant proportion, 33 percent, stayed at friends or relatives' place.
- The average per-trip per person expenditure incurred by an inbound tourist is estimated at USD 385. While tourists from Oceania countries account for only 2 percent of total tourists, they form the highest spending category, with an average per-trip per-person expenditure of USD 1354.

### Domestic Tourism

- In Zimbabwe, the latest Domestic and Outbound Tourism Survey (DOTS) was carried out in 2017. The survey also collected data from currently employed population comprising of all persons



15 years and above. The first TSA is based on the data from this survey, for domestic and outbound tourism and also to derive Tourism employment.

- Both day trips and overnight trips were the highest in the months of November (10.7 percent and 11.4 percent respectively) and August (11.3 percent and 10.0 percent respectively).
- Duration of stay is an important information as higher the duration, higher is the expenditure incurred, hence giving a trigger to tourism demand. For a majority of the domestic overnight trips, average length of stay was between 2 to 4 nights.
- Of all the same day trips undertaken, destination province for 20.5 percent of the tourists was Harare, making it the most popular place of destination. On the other hand, Bulawayo was the most popular province of destination among overnight domestic tourists, accounting for 18.8 percent of total tourists.
- Road transport was the most popular mode of transport among both overnight and same-day tourists.
- The most preferred type of accommodation availed by an overnight domestic tourist is friend's or relative's place. This accounted for 81.7 percent of total tourists.
- The average per-trip per-person expenditure for an overnight domestic trip is estimated at USD 25.1 while the same is USD 17.8 for a same-day trip.

## Tourism Satellite Account

- The tourism expenditure, obtained from VES and DOTS, are updated and price-adjusted for the TSA reference year of 2018.
- The TSA finds that a total of USD 1199 million is the tourism expenditure incurred by inbound tourists within the country. Meanwhile, USD 766 million is spent by domestic and outbound tourists.
- In all, a total of USD 1965 million tourism expenditure is incurred by inbound, domestic and outbound tourists, taken together, within the economic territory of the country. Inbound tourism, therefore, accounts for 61 percent while the remaining 39 percent is on account of domestic and outbound tourism.
- In terms of GDP, tourism direct GDP (TDGDP) amounts to USD 1028 million for 2018, which works out to be 4.25 percent of total GDP of USD 24201 million.
- With respect to jobs, with 101,327 jobs in tourism sector, it is estimated to contribute 1.56 percent to total national employment.



# CHAPTER 1

## INTRODUCTION

Satellite accounts are widely prepared to measure the size of economic sectors that are not defined distinctly as industries in the National Accounts. Tourism is one of such sectors, which is embedded in a number of other sectors of the National Accounts but is not readily apparent. It originates from the activity of visitors (which can be both overnight tourists and same-day excursionists) and is therefore considered a demand-side phenomenon. In this sense, the economic contribution of tourism has to be approached from the activities of visitors and their impact on the acquisition of goods and services. However, tourism can also be viewed from the supply side, and it will then be understood as a set of productive activities that cater mainly to visitors or for which an important share of their main output is consumed by visitors. These productive activities, or industries, entail economic value added and employment.

An important statistical tool to understand the demand and supply side characteristics of tourism sector is Tourism Satellite Account (TSA), which is an accounting procedure designed to measure goods and services associated with the activity of tourism undertaken within the boundary of a country or a region or a state.

The important uses, motivators and applications of TSA are the following:

- Quantifies the contribution of tourism to the economy with respect to its Gross Domestic Product (GDP) and employment;
- Generates a set of accounts that are both internationally compatible and are aligned with the national accounting principles;
- Needed to monitor the contribution of tourism in Sustainable development (SDG indicator 8.9 on tourism direct GDP as well as SDG indicator 12.b on implementation of standards for measuring environmental aspects of tourism, in terms of tables from the TSA and the System of Environmental-Economic Accounting (SEEA)).
- Provides information on the employment profiles of the tourism industry;
- Provides the industry and government tourism agencies with a powerful tool to use in advocacy for the tourism sector;
- Offers a reference framework within which impact models and other analytical economic models of tourism can be calculated;
- Helps to raise the profile of tourism and increase awareness of its economic importance
- Leads to improvement in the basic statistics available in the country, as its production requires good quality data;
- Provides a strong foundation for further research, e.g. calculating the indirect effects of tourism.
- Specifically, it can assist private sector operatives by:
  - Providing an important tool for advocacy;
  - Identifying the composition of the sector (what industries provide goods and services to visitors and to what extent do they do so);
  - Identifying component industries' dependence on tourism (how much individual industries are dependent on tourism demand);
  - Assisting in redirecting marketing activities (by providing information on the relative importance of different components of tourism demand);
  - Demonstrating how the market is evolving and changing (by providing consistent time series data which reflects changes in the composition of tourism demand).

For government officials some of the ways the TSA can assist include:

- Better understanding the sector from an "industrial" perspective (by identifying the range of industries which supply visitors; providing a measure for the share of their output that is consumed by visitors, etc.);
- Suggesting new approaches to destination marketing: there is growing evidence that more complete statistical information (regarding both domestic and inbound tourism, identifying what types of visitors contribute best to the country's economy, etc.) can contribute to a more precise design of marketing policies, strategies and programs, to ensure a more efficient management of the resources allocated to National Tourism Administrations, and to improve analysis and policy effectiveness;
- Mainstreaming tourism policy within general evidence-based macroeconomic policies. Having a TSA permits greater internal consistency of tourism statistics with the rest of the statistical

system of a country, as well as increased international comparability of these data, allowing tourism to be seamlessly integrated into macroeconomic analysis, and thus policy.

- Opening new avenues of public-private sector cooperation (by assisting in identifying where such cooperation could take place) and developing non-traditional partnerships (by providing new information which could identify potential partnerships not previously thought of), relating to for example:
- Government income derived from tourism activity,
- The role played by tourism industries,
- The improvement of tourism related infrastructure, etc;
- Facilitating closer inter-departmental liaison and cooperation (by highlighting the need for cooperation between various government departments, e.g. National Tourism Administrations, National Statistical Offices and Immigration Departments).
- More specifically, a TSA is a powerful lobbying tool for National Tourism Administrations (NTAs) to advocate the cause of tourism and may, consequently, pave the way for their leadership. It may contribute to the empowerment of NTAs within national governments over the medium term, not only as a consequence of the leadership NTAs necessarily need to assume in pushing ahead the TSA project (which requires coordination with other government entities such as the National Statistical Office and the Central Bank) but also because TSA results can help raise awareness of the relative importance of tourism.

The World Tourism Organization (UNWTO) lays down standard international guidelines for the collection, compilation and dissemination of statistics on tourism by the member countries, to enable them to prepare TSAs for their respective countries. UNWTO led the development of "International Recommendations for Tourism Statistics 2008 (IRTS, 2008)" as well as "Tourism Satellite Account: Recommended Methodological Framework 2008 (TSA: RMF 2008)", both of which have been adopted by the UN Statistical Commission (UNSC). Implementation of these statistical standards allows data comparability between countries, groups of countries, other economic sectors and over time.

The IRTS-2008 focuses on the activities carried out by visitors and on measuring them using both monetary and non-monetary indicators. It provides a common reference framework for countries to use in the compilation of tourism statistics. This ensures international comparability of tourism statistics and enhances the coherence of tourism statistics.

In TSA: RMF 2008, the conceptual framework for TSA is laid out. According to this, TSA comprises a set of tables and is mainly descriptive in nature. It helps in assessing the size and contribution of tourism to the economy. It provides accounts and tables and macroeconomic aggregates, principal among them being the Gross Value Added of the Tourism Industry (GVATI), Tourism Direct Gross Value Added (TDGVA) and Tourism Direct Gross Domestic Product (TDGDP).

For most of the economies, the readily available tourism statistics relate to the number of visitors, comprising overnight tourists and same-day visitors or excursionists. These are also commonly available by types of visitors, that is, inbound, domestic, and outbound visitors. Among these, those whose trip include at least one night, are called overnight visitors or tourists and the others with no overnight stay are called day-visitors or same-day visitors.



In many countries, the statistics on inbound visitors arriving in the countries are collected by the Immigration Bureaus of the respective countries while in several other countries, tourism surveys at the exit points or borders are conducted. To arrive at the statistics on domestic and outbound tourists, different countries adopt different data sources, most of which include household surveys.

However, for the preparation of Tourism Satellite Account (TSA), the requirement is not just the statistics on tourism flows, as mentioned above, but also monetary and non-monetary data on tourism related to both demand side and the supply side. The demand side data refers to the values of tourism expenditure across all forms of tourism, that is, Inbound Tourism, Domestic Tourism and Outbound Tourism. The supply side data refers to the production account of tourism industries, in the Supply and Use Table (SUT) framework. Both demand side and supply side data are required on tourism related goods and services.

This report presents the first ever Tourism Satellite Account for Zimbabwe, prepared for the reference year of 2018. Although both the years 2018 and 2019 were considered to be the appropriate benchmark years for the country's first TSA, as these are the years just before the abnormal pandemic year of 2020, 2018 was chosen against 2019. This is because from 2019 onwards the national currency changed from USD to Zimbabwe Dollar. Hence, it was agreed in the technical meetings held during the course of the study and participated by representatives of UNWTO, Zimbabwe Tourism Authority (ZTA); Zimbabwe National Statistics Agency (ZIMSTAT); and Ministry of Environment, Climate, Tourism and Hospitality Industry, that updating the SUT and other datasets can be very challenging which would require converting the values to new currency. However, going forward, as all the macro-economic data are being presented in terms of Zimbabwe Dollar, future TSAs will be prepared in terms of country currency. Accordingly, the

underlying SUTs and the demand side expenditure data will also be compiled in terms of Zimbabwe Dollar.

The report is structured as follows. This section discussed the importance of preparing a TSA. Section II gives the description of key data sources used in preparation of TSA for Zimbabwe. Section III presents the methodology adopted in preparing each of the TSA Tables. The next section discussed the data gaps and ways to address these gaps. Conclusions and recommendations form Section V. All final TSA Tables are presented together in the last section.





## CHAPTER 2

# DATA SOURCES

Per the UN adopted statistical standard for TSA, published as "Tourism Satellite Account: Recommended Methodological Framework, 2008" (TSA: RMF-2008), the key data sources required for the preparation of TSA are:

- 1.** Demand side data – Tourism Expenditure by International and Domestic Visitors – these are mostly survey-based data
- 2.** Supply side data – Production Account of Tourism industries – these are based on Supply and Use Tables (SUT), which provides the details of production account of the industries, as desired for the preparation of TSA.
- 3.** The consolidation of demand side and supply side data is the core element of TSA as it derives the tourism industry ratios or extracts the tourism component from the goods and services which are tourism-related but are consumed by both tourists and non-tourists.
- 4.** Tourism Employment – mostly survey-based data on employment in the country, out of which employment in Tourism characteristic industries is extracted.

All of these are recommended to be compiled and tabulated across the following tourism-specific good and services international classification.

- Accommodation services for visitors
- Food and beverage serving services
- Railway passenger transport services
- Road passenger transport services
- Water passenger transport services
- Air passenger transport services
- Transport equipment rental services
- Travel agencies and other reservation services
- Cultural services
- Sports and recreational services
- Country-specific tourism characteristic services
- Country-specific tourism connected products

The demand side data on these goods and services are sourced from various agencies in Zimbabwe, which are responsible to conduct the Inbound Tourism Survey, better known as Visitor Exit Survey (VES) and the Domestic and Outbound Tourism Survey (DOTS). These are the following:

- Zimbabwe Tourism Authority (ZTA)
- Zimbabwe National Statistics Agency (ZIMSTAT)
- Ministry of Environment, Climate, Tourism and Hospitality Industry

## 1. Visitor Exit Survey

The Visitor Exit Survey (VES) was conducted to collect the data on Inbound Tourism Expenditure incurred by international overnight and same-day visitors in Zimbabwe. The first such survey was coordinated and conducted by the then Zimbabwe Tourist Development Corporation (ZTDC) in 1992-93. The three subsequent surveys were carried out by ZTA in 1999-00, 2001-02 and 2004-05. The latest survey, for 2015-16, is the fifth to be conducted in Zimbabwe since independence in 1980. Zimbabwe's first TSA is based on VES-2015-16. The key characteristics of this survey were the following:

- Data collection for the survey was carried out over 12 calendar months starting in July 2015 and ending in June 2016. This made sure that the seasonal effects are captured.
- The survey was carried out at ten Ports of Exit of which seven were border posts and three were airports. The ten Ports of Exit were selected according to high volume of traffic flow and ensuring coverage of exits to all neighbouring countries.
- Face-to-face interviews were conducted using paper questionnaires on a sample of visitors departing Zimbabwe.
- A total of 38,680 visitors were selected to participate in the survey. Interviews were successfully completed for 34,185 visitors while 332 interviews were partially completed yielding an overall response rate of 89.2%. About two in five visitors were female.
- The information was collected from those visiting the country for tourism purpose, making sure that the visitors complied with the definition of "Overnight Tourist" and "Day-visitor or Excursionist" as per IRTS-2008. Hence, the respondents were the residents of other countries who visited Zimbabwe

for periods not exceeding twelve months for any reason other than taking up employment and the in-transit visitors who entered the country en-route to other destinations.

The specific objectives of the VES-2015-16 were the following:

- to feed into the production of a Tourism Satellite Account (TSA);
- obtain demographic and socio-economic information on visitors to Zimbabwe;
- obtain direct feedback from the visitors on their experiences in and impressions of the country;
- obtain information on the travel and expenditure patterns of visitors;
- obtain information on visitor requirements and their user-ship of various tourist facilities and services e.g. accommodation, amenities, activities and transport;
- assess the uptake level of package/inclusive tours compared to individual bookings; and
- facilitate comparison of current survey results with previous studies.

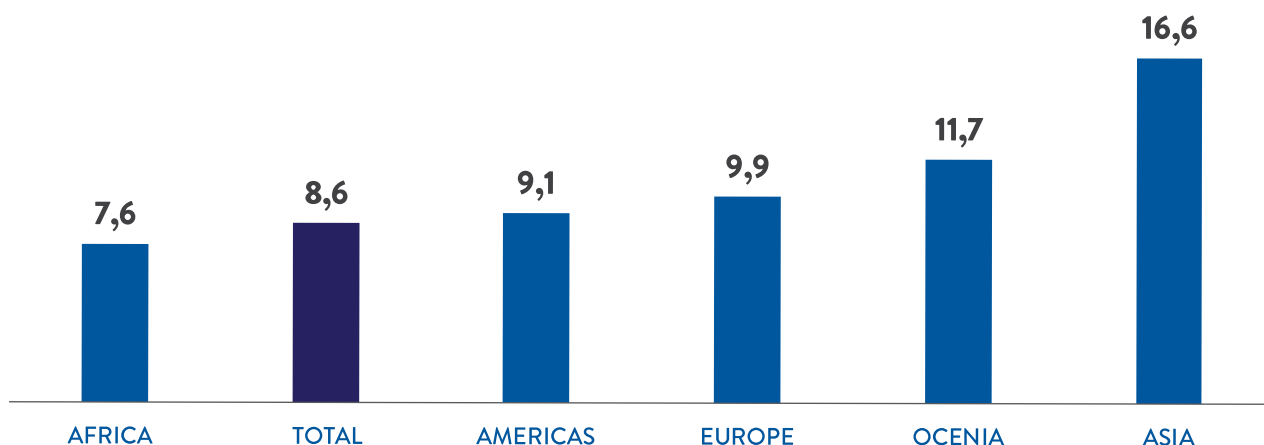
The survey makes some interesting observations on the profile of the visitors and on the trip characteristics. Some of the key highlights are as follows:

- A majority of inbound visitors were from Africa (80.7 percent), followed by 9.8 percent from Europe, 5.7 percent from Americas, 2.0 percent from Oceania and just 1.7 percent from Asia.
- Within Africa, visitors from South Africa accounted for the maximum, that is, 38.1 percent.

- About 43.1 percent of the visitors reported to be travelling alone, while 26.1 percent travelled with families.
- A majority of visitors (34.2 percent) used buses/coaches as the mode of transport to enter the country. About 18.8 percent came by air.
- The average length of stay for overnight tourists was 8.6 nights. Figure 1 (see next page) presents the average length of stay by tourist's place of origin. About 31.1 percent of the visitors travelled for social purpose or the purpose of visiting friends and relatives. Only 18.2 percent of the visitors travelled for holiday or leisure purpose.
- With regard to type of accommodation availed by the visitors, as many as 42 percent did not utilise any accommodation. These included excursionists and visitors who slept in coaches/buses, trucks, cars, churches etc. Another significant proportion, 33 percent, stayed at friends or relatives' place (Figure 2, see next page).
- The survey estimated the average per-trip per person expenditure incurred by an inbound visitor, for 2015-16, to be USD 385. While visitors from Oceania countries accounted for only 2 percent of total visitors, they formed the highest spending category, with an average per-trip per-person expenditure of USD 1354 (Figure 3, see next page).

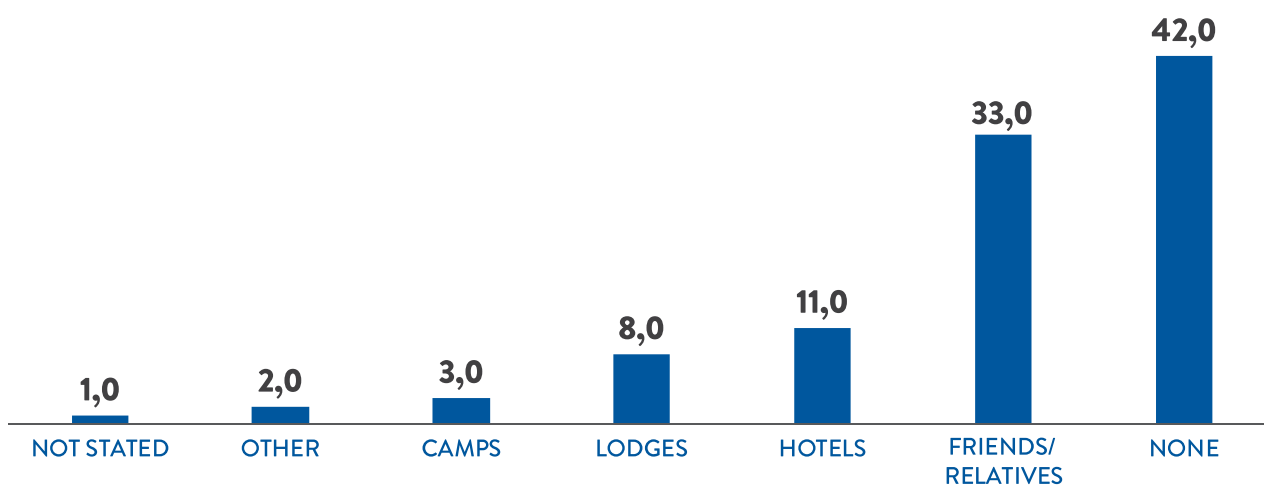
For the current study, data from this survey are being used, after updating for the TSA reference year, that is, 2018 and also adjusting for price variation. The estimated number of inbound visitor arrivals, for 2018, were obtained from the Immigration Department. Hence, total inbound tourism expenditure is estimated as the product of per-visitor expenditure, as obtained from the VES data, and the number of visitor arrivals, as obtained from the Immigration Department. The visitors are categorised into overnight tourists and the day-visitors or excursionists.

Figure 1: Average length of stay by inbound tourist's place of origin (number of nights), 2015/16



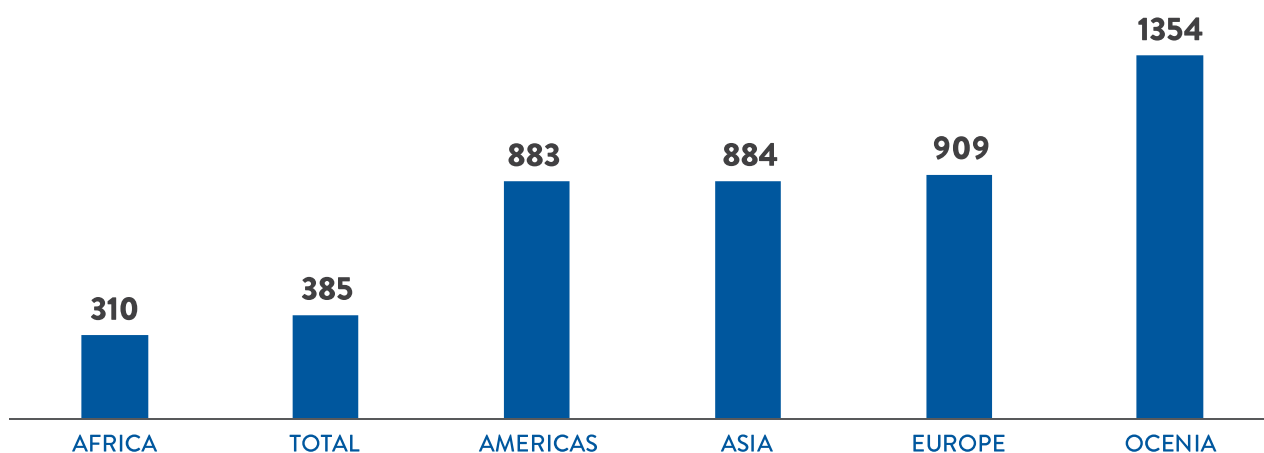
Source: Visitors' Exit Survey, 2015/16

Figure 2: Percentage distribution of inbound tourists by types of accommodation availed, 2015/16



Source: Visitors' Exit Survey, 2015/16

Figure 3: Average per-trip per-person expenditure on an inbound trip (USD), 2015/16



Source: Visitors' Exit Survey, 2015/16



## 2. Domestic and Outbound Tourism Survey

According to the IRTS 2008, household surveys should be conducted to collect information on domestic tourism expenditure. In the IRTS 2008, para 2.71, it is stated that "Because there are no international borders to cross, the observation of the flows of domestic tourism requires the use of different statistical procedures. As far as overnight tourism is concerned, accommodation statistics are an important statistical source of information on domestic and inbound visitors. Measurement challenges nonetheless arise with these statistics in terms of separating out visitors from other travellers, and domestic from inbound visitors. Information can also be obtained from household surveys by interviewing people about trips undertaken in a specified period".

In Zimbabwe, the latest Domestic and Outbound Tourism Survey (DOTS) was carried out in 2017. The number of domestic visitors and their expenditures were estimated through this survey. The expenditure data were collected for all tourism products and services. The key characteristics of the survey were the following:

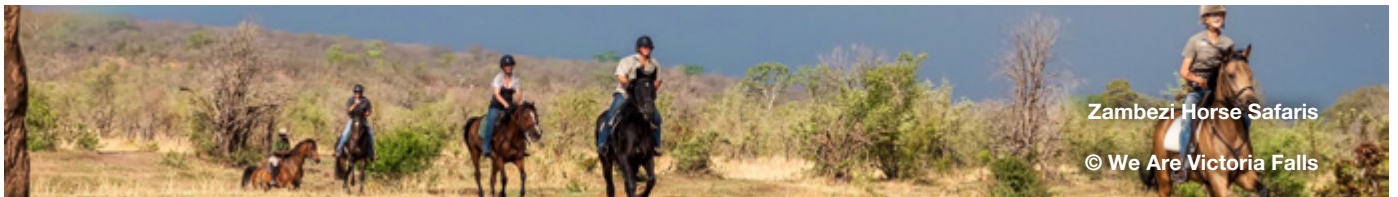
- The reference period of the survey was December 01, 2016 to November 30, 2017.
- The survey was initiated by the Ministry of Environment, Climate, Tourism and Hospitality Industry (MECTHI), its parastatal Zimbabwe Tourism Authority (ZTA), and ZIMSTAT.
- The survey was primarily conducted to feed into the data requirements for the country's first TSA, planned to be prepared since then.
- Other than domestic and outbound expenditure, the survey also collected information on tourism employment, another key input for TSA.

- Information collected by the survey included:
  - Domestic day and overnight trips undertaken;
  - Trips by respondents and trips by other household members without the respondent accompanying them;
  - Profile of the most recent day and overnight domestic and outbound trips both by the respondent and other household members (destination, trip length, purpose of visit, accommodation, transport, activities, trip expenditure, etc.);
  - Socio-demographics;
  - Household characteristics;
  - Employment and education abroad.

The survey objectives were to provide information that will help to:

1. Understand the domestic and outbound travel behaviour of Zimbabwean residents
2. Estimate the total number of domestic and outbound tourists
3. Estimate the expenditure on domestic and outbound tourism trips
4. Generate TSA tables which are crucial in determining the contribution of tourism to the country's economy.

The domestic trips are classified into overnight and same-day trips. As mentioned before, the survey also collected information from the outbound tourists. The number of outbound tourists, as estimated by the DOTS survey, across ports of exit, are presented in the table below.



With regard to employment, the survey collected data from currently employed population comprising of all persons 15 years and above and who during the last 7 days preceding the interview:

- a. Did some work (even for just one hour) for pay, profit or family gain, in cash or in kind; or
- b. Were attached to a job or had an enterprise from which they were 'temporarily' absent during this reference period (for such reasons as illness, maternity leave, parental leave, training, industrial disputes or bad weather).

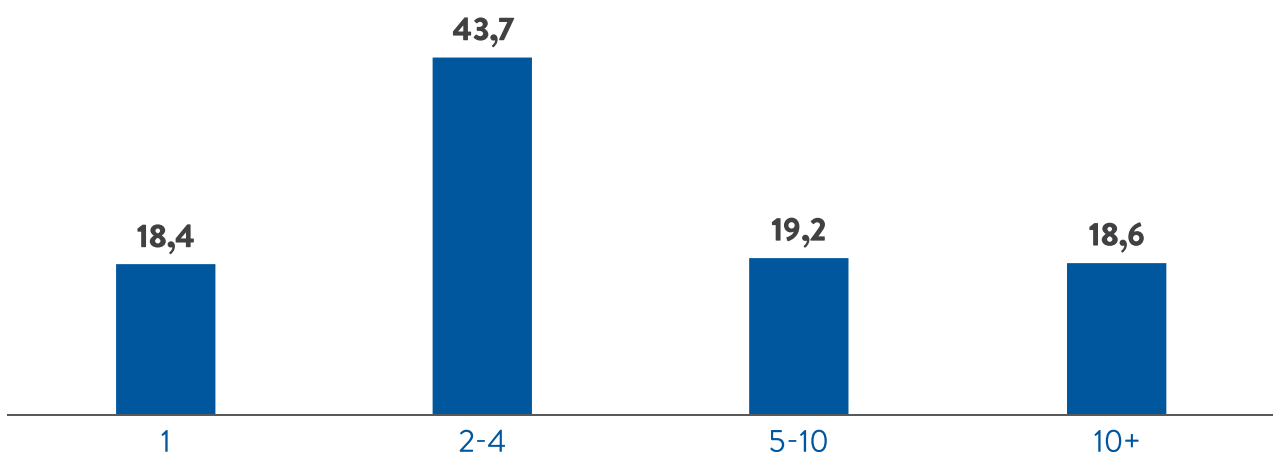
Some of the key highlights of the DOTS survey are the following:

- Both day trips and overnight trips were the highest in the months of November (10.7 percent

and 11.4 percent respectively) and August (11.3 percent and 10.0 percent respectively).

- Duration of stay is an important information as higher the duration, higher is the expenditure incurred, hence giving a trigger to tourism demand. For a majority of the domestic overnight trips, average length of stay was between 2 to 4 nights. Figure 4 presents the percentage distribution of domestic tourists by number of nights spent during the trip.
- Of all the same day trips undertaken, destination province for 20.5 percent of the day-visitors was Harare, making it the most popular place of destination. On the other hand, Bulawayo was the most popular province of destination among overnight domestic tourists, accounting for 18.8 percent of total visitors.

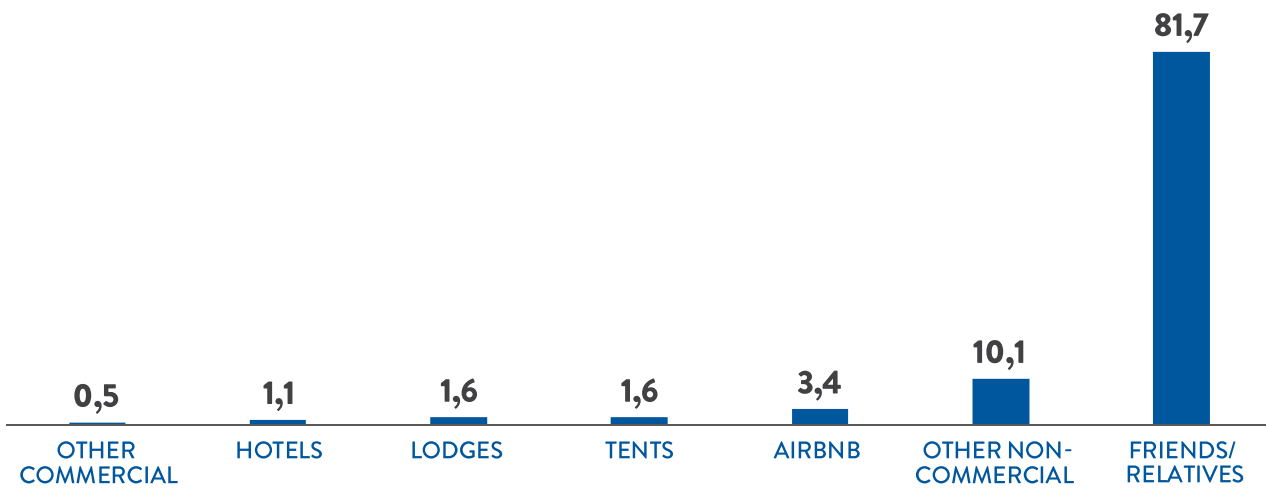
**Figure 4: Percentage distribution of domestic tourists by average length of stay, 2017**



Source: Domestic and Outbound Tourism Survey, 2017

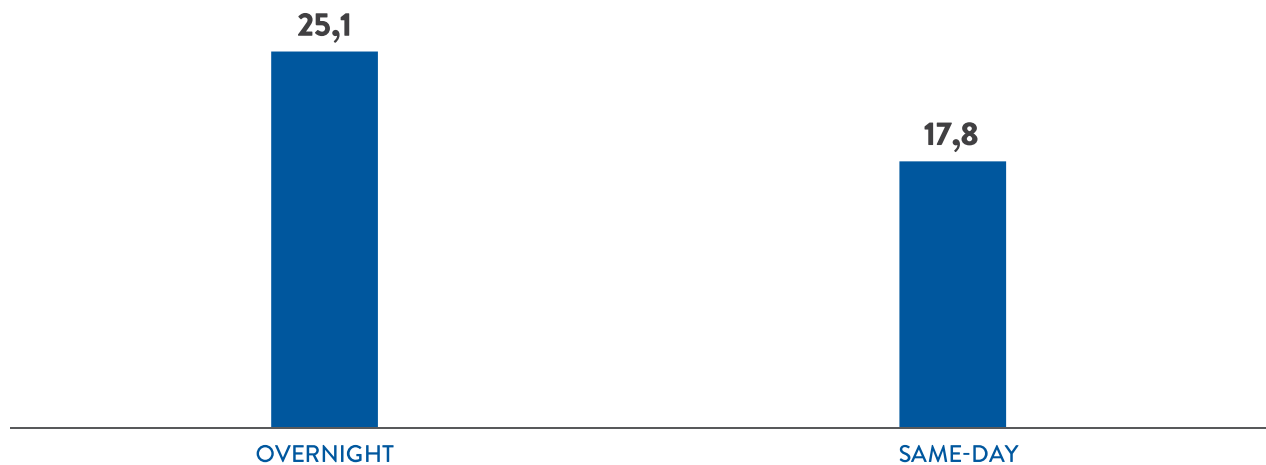
- Road transport was the most popular mode of transport among both overnight and same-day visitors.
- The most preferred type of accommodation availed by an overnight domestic tourist is friend's or relative's place. This accounted for 81.7 percent of total visitors (Figure 5).
- The survey found that, in 2017, the average per-trip per-person expenditure for an overnight domestic trip was USD 25.1 while the same for a same-day trip was USD 17.8.

Figure 5: Percentage distribution of domestic visitors by type of accommodation availed, 2017



Source: Domestic and Outbound Tourism Survey, 2017

Figure 6: Average per-trip per-person expenditure on a domestic trip (USD), 2017



Source: Domestic and Outbound Tourism Survey, 2017





Nguni Guest Lodge - Breakfast

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## CHAPTER 3 METHODOLOGY

As per the TSA: RMF 2008, the TSA for any country comprises a set of ten standard tables which are the key to estimating the economic contribution of tourism in the economy. Preparing the tables in the standard recommended format and following a standard broad methodology enables international comparisons.

These ten tables include the detailed data on expenditure incurred by the visitors on the identified goods and services as well as the data on supply of industries that produce these goods and services. The key aggregates of TSA are:

- Internal tourism expenditure and internal tourism consumption;
- Tourism direct gross value added (TDGVA); and
- Tourism direct gross domestic product (TDGDP).

The ten standard TSA tables are described as follows:

**Table 1: Standard TSA Tables**

<b>TSA Table</b>	<b>Brief Description</b>
<b>1.</b> Inbound Tourism Expenditure	Expenditure of a non-resident visitor within the economy of reference.
<b>2.</b> Domestic Tourism Expenditure	Expenditure by resident visitors on tourism-related products within the economy; it is the sum of the household tourism expenditure and business and government tourism expenditure.
<b>3.</b> Outbound Pre-trip Tourism Expenditure	Expenditure by resident visitors, who plan to travel abroad, on tourism-related products within the economy of reference and incurred before arriving at the international port of exit and after returning to the international port of entry.
<b>4.</b> Total Internal Tourism Consumption	Sum of inbound, domestic, and outbound pre-trip expenditure, along with the components of imputed tourism consumption like social transfers, and vacations homes, among others.
<b>5.</b> Production Account of Tourism Industries	Supply-side information in the Supply and Use Table (SUT) framework.
<b>6.</b> Supply and Internal Tourism Consumption	Confrontation of demand and supply to arrive at the Tourism Product and Tourism Industry Ratios.
<b>7.</b> Tourism Employment	Number of jobs associated with tourism.
<b>8.</b> Tourism Gross Fixed Capital Formation	Total value of a producer's acquisitions, less disposals, of fixed assets during the accounting period.
<b>9.</b> Tourism Collective Consumption	Part of Government Final Consumption Expenditure, which is meant for the community as a whole, for providing services related to tourism.
<b>10.</b> Non-Monetary Tourism Indicators	All non-monetary tourism-related indicators.

Source: UNWTO, Recommended Methodological Framework, 2008



For Zimbabwe's first TSA, Tables 1 to 7 and 10 have been prepared in this report. Tables 8 and Table 9, as per the TSA: RMF 2008 (Para 4.99), should be the objects of a more advanced development of the Tourism Satellite Account. Hence, these are left out of the scope of present study.

The other tables, along with the recommended as well as adopted methodology, are presented in the sections below:

### **1. Table 1: Inbound Tourism Expenditure**

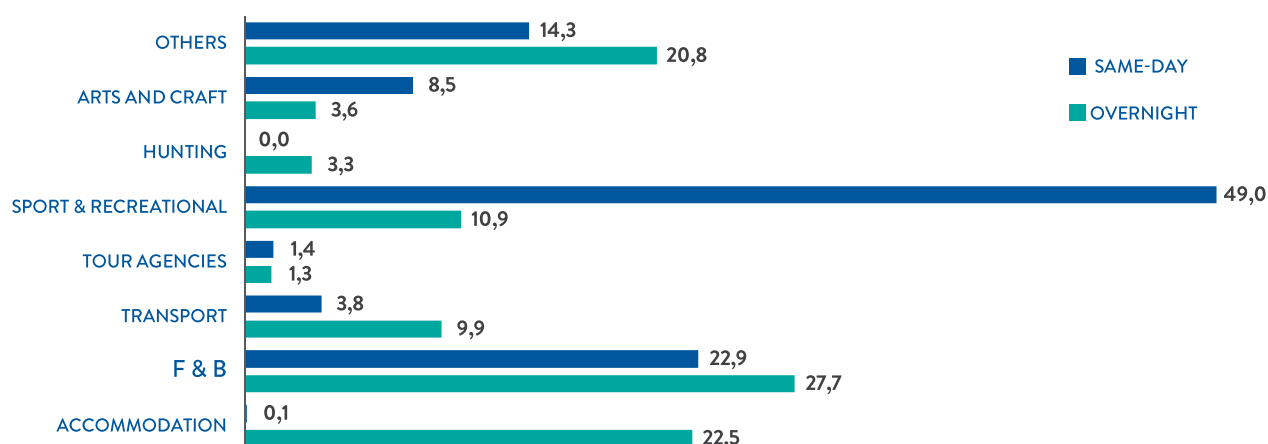
Table 1 focuses on inbound tourism or tourism activity undertaken by non-resident visitors in the economy of reference. It presents the tourism expenditure incurred by non-resident visitors within the economy of reference on tourism characteristic and tourism connected products and services. An inbound tourism trip refers to the travel of a visitor from the time of arriving in a country to the time of leaving that country.

According to the IRTS 2008, it is recommended that the inbound tourism expenditure should be obtained through surveys conducted at the exit points. Some of their subsets may also be available from the balance of payments statistics and national accounts statistics. In the case of countries where administrative controls do not exist at the borders and where surveys of travellers cannot be implemented at the border, it is recommended that surveys of travellers at places of accommodation be used in parallel with other sources (for example, surveys at popular tourism sites or other destinations).

For Zimbabwe, the inbound tourism expenditure includes that incurred by both overnight tourists and also by same-day visitors. The steps followed in preparing TSA Table 1 are as follows:

- The inbound tourism expenditure for each source country is obtained by multiplying the average per-visitor expenditure incurred by visitors arriving from each country of origin, with the number of visitors from the corresponding countries. The average per-visitor expenditures are obtained from VES survey, updated and price adjusted for 2018.
- In order to obtain the inbound tourism expenditure by products and services, the percentage distribution, as seen in VES-2015-16 data, is applied on the aggregate value of inbound tourism expenditure, as obtained in above step.
- These data, by the tourism products and services, have been used in the preparation of TSA Table 1, after updating for price variation. The data on Consumer Price Index, by different items, were used to derive the inflation for the tourism related products and services.
- Hence obtained TSA Table 1 is presented in Section VI, along with other TSA Tables.
- The following figure (Figure 7) presents the pattern of expenditure incurred by overnight and same-day inbound visitors, as estimated for 2018. It shows that overnight tourists, 2.58 million in number, spent 27.7 percent of their total expenditure on food and beverage providing services. Another 22.5 percent and 20.8 percent were spent on accommodation and other services respectively. "Others" include other consumption products, valuables and other products and services which are not included elsewhere. On the other hand, same-day inbound visitors, about 0.3 million or 10.3 percent of total inbound visitors, spent almost half of their total expenditure (49 percent) on sports and other recreational activities. As expected, there is barely any expenses towards accommodation.

**Figure 7: Percentage distribution of expenditure incurred by inbound visitors on various tourism products and services, 2018**



Source: TSA Table 1

## 2. Table 2: Domestic Tourism Expenditure

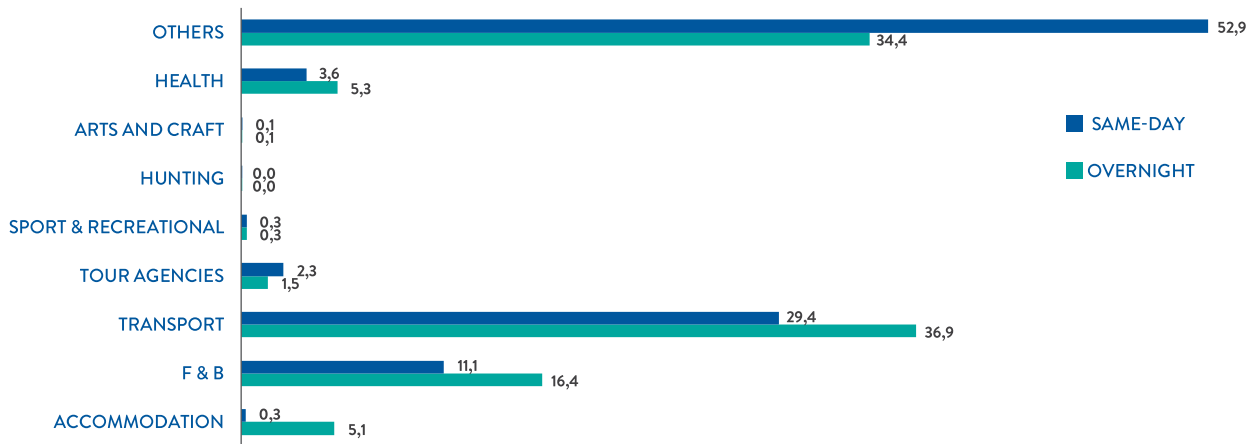
The domestic tourism expenditure by products and services are used to prepare the TSA Table 2. Domestic tourism refers to the tourism activity undertaken by resident visitors in the economy of reference. Domestic tourism expenditure is the expenditure incurred by them on tourism characteristic and tourism connected products and services. To be specific, a domestic tourism trip refers to the travel of a resident visitor from the place of his/her residence to the final destination and back.

In order to update the domestic tourism expenditure (as obtained from DOTS-2017) to the TSA reference year of 2018, the methodology similar to inbound tourism expenditure could have been adopted but there are no data on annual domestic tourist visits. Hence, in this case, the following steps were undertaken to arrive at estimated Domestic Tourism Expenditure for 2018:

- The number of domestic visitors for 2018 is estimated using the growth seen in number of

domestic visits to national parks between survey year of 2017 and TSA year of 2018. Although this estimate is based on only number of visits to national parks and does not include a significant number of business visitors, but in absence of any other data, this is considered as a close proxy to estimate the growth in total number of domestic visitors. Hence, it is assumed that number of business visitors and all other types of visitors (or total domestic visitors) grew at the same rate as the number of domestic visits to national parks. This growth in number of domestic visits to national parks works out to be 38 percent. Hence total domestic visitors are also assumed to have grown by 38 percent.

- The number of domestic visitors is estimated to be 20.97 million for the year 2018, Of these, number of overnight tourists is estimated to be 12.16 million while the remaining 8.81 million were same-day visitors.
- Further, average per-trip expenditure for 2017 is applied on the estimated number of visitors for 2018 (as above) to arrive at the total domestic tourism expenditure for 2018.

**Figure 8: Percentage distribution of expenditure incurred by domestic visitors on various tourism products and services, 2018**

Source: TSA Table 2

- In order to obtain the item-wise expenditure, the percentage distribution of domestic tourism expenditure, as seen in 2017 survey, is applied on total estimated domestic tourism expenditure for 2018.
- Hence obtained TSA Table 2 is presented in Section VI, along with other TSA Tables.
- The following figure (Figure 8) presents the pattern of expenditure incurred by overnight and same-day domestic visitors, as estimated for 2018. It shows that overnight tourists spent 36.9 percent of their total expenditure on transport services. On the other hand, same-day visitors spent 52.9 percent of their total expenditure on "others".

### 3. Table 3: Outbound Tourism Expenditure

The outbound tourism expenditure is depicted in the TSA Table 3. This table presents the tourism expenditure incurred by resident visitors outside the country of reference on tourism characteristic and tourism connected products and services, respectively. This expenditure could have been incurred either as part of an outbound tourism trip or as part of a domestic trip. Both correspond to the travel between leaving the place of residence and returning. However, a domestic trip has a main destination within the country of residence of the traveller, while an outbound trip has a main destination outside this country.

It should be noted that for TSA purpose, only that expenditure, which is incurred within the geographic boundary of the country, has to be taken into account. Hence, in the case of outbound tourists, only pre-trip expenditure incurred within the country is presented in TSA Table 3.



The TSA: RMF recommends the use of one of the following methods, or a combination of these, to determine the flows of outbound visitors:

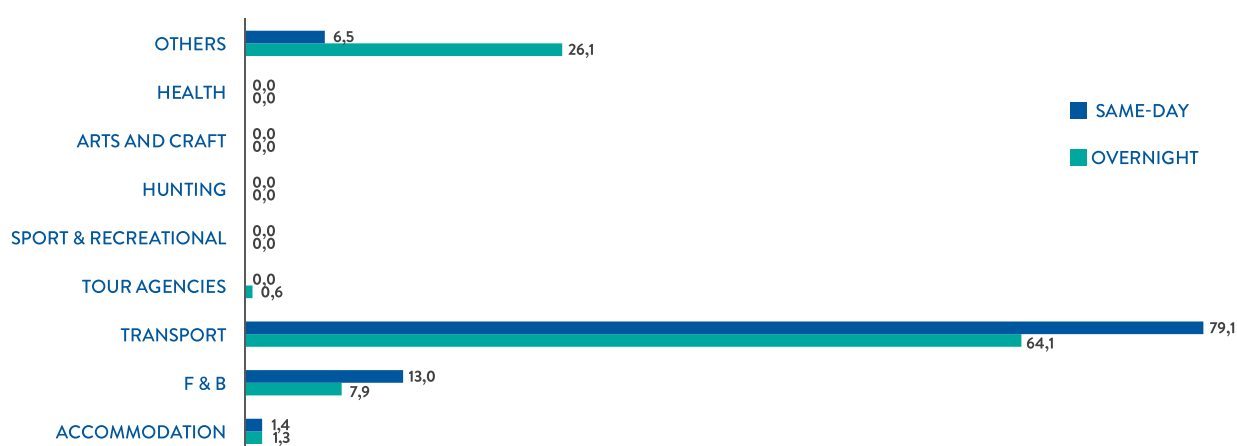
- Use of an entry or departure card;
- A specific survey at the border; or
- Observing travellers from household surveys because they belong to resident households.

In the third case, the information on outbound trips is usually collected at the same time as that on domestic trips. For Zimbabwe, DOTS is the source of data for outbound tourism too. The steps followed to derive Table 3 are as follows:

- The estimated number of outbound tourists are available on annual basis, hence, are available for 2018 too. The average per-trip outbound tourism expenditure, at aggregate level, for the year 2017 is applied on the number of outbound tourists for 2018, to arrive at the estimated outbound tourism expenditure for 2018, at 2017 prices.

- In order to arrive at the estimated expenditure by products and services, the percentage distribution, as seen in DOTS 2017, is applied on the estimated number of outbound tourists to arrive at the estimated Outbound Tourism Expenditure for both 2017 and 2018.
- The estimated outbound tourism expenditure for the year 2018 is estimated by adjusting these expenditures, obtained at 2017 prices, for price variation between 2017 and 2018.
- Hence obtained outbound tourism expenditure presented in TSA Table 3.
- The following figure (Figure 9) presents the pattern of expenditure incurred by outbound tourists, as estimated for 2018. It shows that both overnight and same-day outbound tourists spent the most on transport services, which include the expenditure incurred on transportation from residence to port of exit to final destination country.

**Figure 9: Percentage distribution of expenditure incurred by outbound tourists on various tourism products and services, 2018**



Source: TSA Table 3

**4. Table 4: Total Internal Tourism Expenditure**

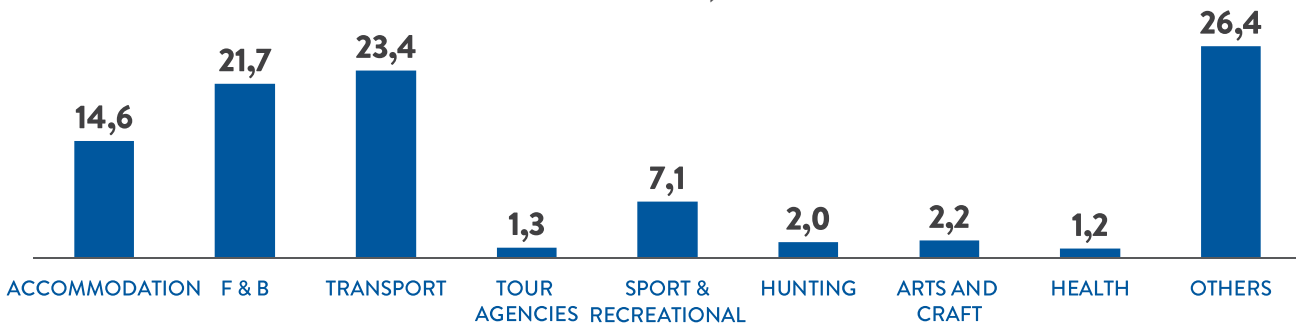
The TSA Table 4 is the sum of Tables 1, 2 and 3 and presents the entire expenditure incurred by all types of visitors on tourism related goods and services within the geographic boundary of the country of reference, estimated for 2018. This represents the demand side data of the tourism sector. This may also be considered as the tourism sector’s total value of output.

In order to derive the Gross Value Added of Tourism as an industry, the demand side data need to be compared with the supply side data in the Supply and Use Table (SUT) framework. This supply side data is the detailed presentation of the production account of all economic activities in the SUT format. The next table presents this production account.

TSA Table 4 is presented in Section VI. Of the total internal tourism expenditure, 26.4 percent was spent on “Others”, followed by 23.4 percent on transport and 21.7 percent on food and beverage serving services (Figure 10). Figure 11 presents the share of each type of tourism – inbound, domestic and outbound – in the total consumption of each of the tourism products and services.

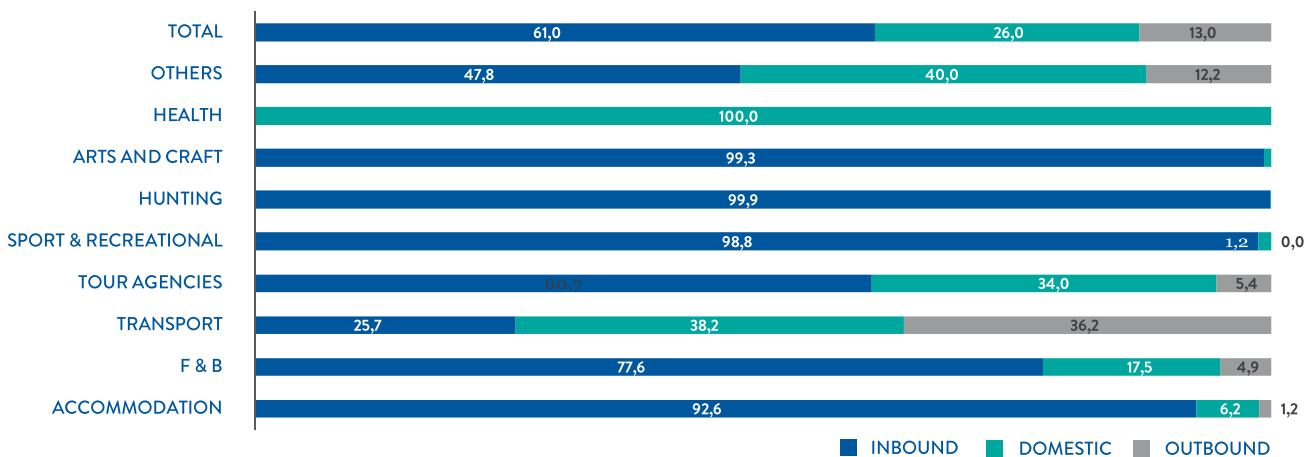
Of the total expenditure incurred on accommodation services, 92.6 percent is on account of inbound tourism. Besides, “Sports and recreational activities”, “Hunting” and “Art and Craft” are also almost entirely consumed by inbound visitors. Health related expenditure is found to be entirely incurred by domestic visitors. Transport services is the only item on which the expenditure incurred is significant among all the three types of tourism.

**Figure 10: Percentage distribution of Total Internal Tourism Expenditure on various tourism products and services, 2018**



Source: TSA Table 4

**Figure 11: Percentage distribution of Internal Tourism Expenditure by types of tourism, 2018**



Source: TSA Table 4



## 5. Table 5: Production Account of Tourism Industries

TSA Table 5 presents the production accounts of tourism and other industries in the economy of reference. It conforms formally to the format established in the Systems of National Accounts (SNA) 1993, for production accounts. The products are shown in rows and columns representing industries.

The Supply table gives the values of products and by-products produced by all the industries, kept in columns. On the other hand, Use table presents the values of products which are used as inputs in the production process of each industry. The Supply Table forms the TSA Table 5. For almost all tourism specific industries, being service industries, only the diagonal elements of the Supply Table have values while the other elements are nil.

To prepare this table, Zimbabwe's SUT-2012 was updated for 2018. TSA Table 5 is presented in Section VI.

## 6. Table 6: Domestic Supply and Internal Tourism Consumption

TSA Table 6 is the core table of the TSA framework. It is this table wherein the demand side data or total internal tourism consumption (of TSA Table 4) is reconciled with the supply side data or the production account of industries (of TSA Table 5). On comparing the demand side and supply side data, the Tourism Product Ratios (TPR) are derived for each of the product categories. By definition, the TPR is the proportion of total supply of a product which is consumed by the visitors or is on account of tourism activity.

These TPRs are applied on each industry column of the supply table, to extract the tourism component from the values of products produced by the industries. Hence, each industry column is split into two columns, depicting total value and the tourism share in this total value. The sum-total of tourism share for each industry column represents the value of tourism component in the production value of each industry.



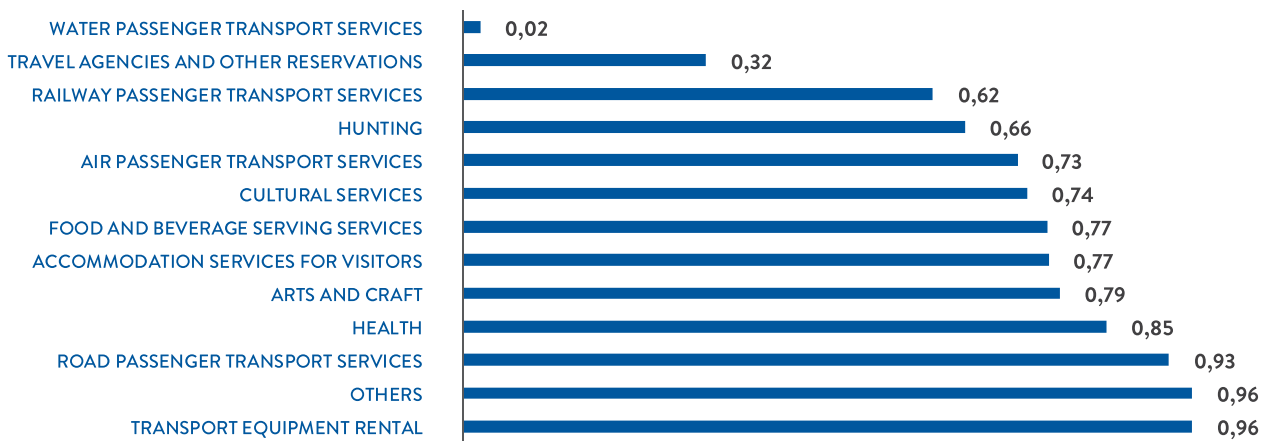
The ratio of tourism component to the total value of production of each industry yields the Tourism Industry Ratios (TIRs) for the respective industry. Using these ratios, the estimates can be derived regarding the GVA attributable to tourism for each of the domestic industries that serve visitors. This provides the basic information that is necessary for the computation of Tourism Direct Gross Value Added (TDGVA) and Tourism Direct Gross Domestic Product (TDGDP), and their components.

The share of TDGDP in total GDP of the economy gives the contribution of tourism in that economy. TSA Table 6 is presented in Section VI.

The following figures present the TPRs (Figure 12) and TIRs (Figure 13) of all tourism products and services.

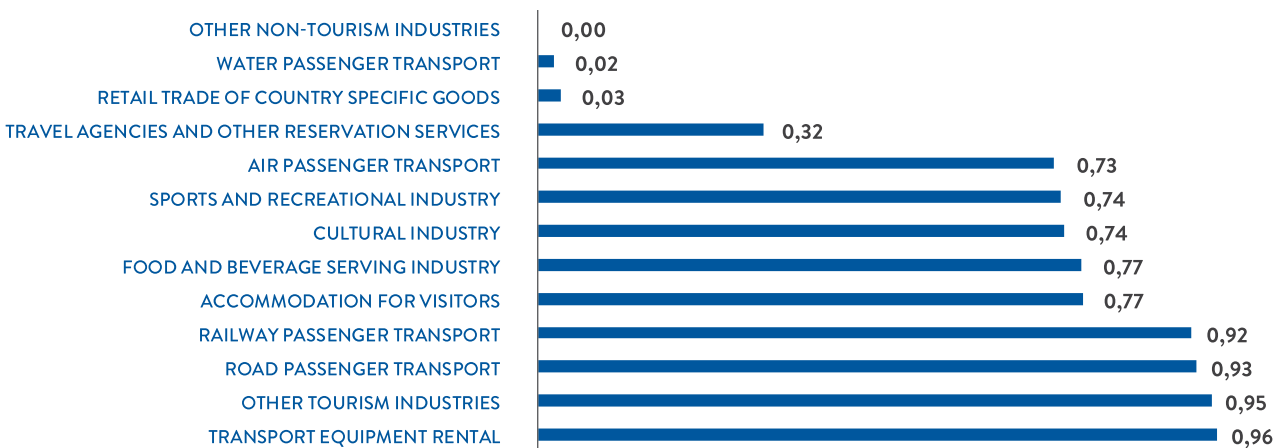
TSA Table 6 finds that Tourism Direct Gross Value Added (TDGVA) is estimated to be USD 926.81 million for 2018. On adding the net taxes of products and production, Tourism Direct Gross Domestic Product (TDGDP) works out to be USD 1027.71 million. This, as percentage to total GDP for the country for 2018 (USD 24201 million), is estimated to be 4.25 percent. This refers to the direct share of tourism to Zimbabwe GDP.

Figure 12: Tourism Product Ratios, 2018



Source: TSA Table 6

Figure 13: Tourism Industry Ratios, 2018



Source: TSA Table 6

## 7. Table 7: Tourism Employment

TSA Table 7 presents the employment situation in tourism industries. According to TSA: RMF 2008, seasonality, high variability in the working conditions, flexibility, and the informality of jobs in several small units are the major challenges in collecting data on employment in tourism industries. Further, labour is a factor of production and is generally associated with an establishment wherein various products are produced. Therefore, relating employment to a specific product or group of products of a given establishment is a complex issue in measuring tourism direct employment.

For this reason, tourism employment, referring to the employment strictly related to the goods and services (tourism characteristic, tourism connected, and other) acquired by visitors and produced by either tourism industries or other industries cannot be assessed directly. Hence, the recommendations in TSA: RMF 2008 are restricted to employment in tourism characteristic industries.

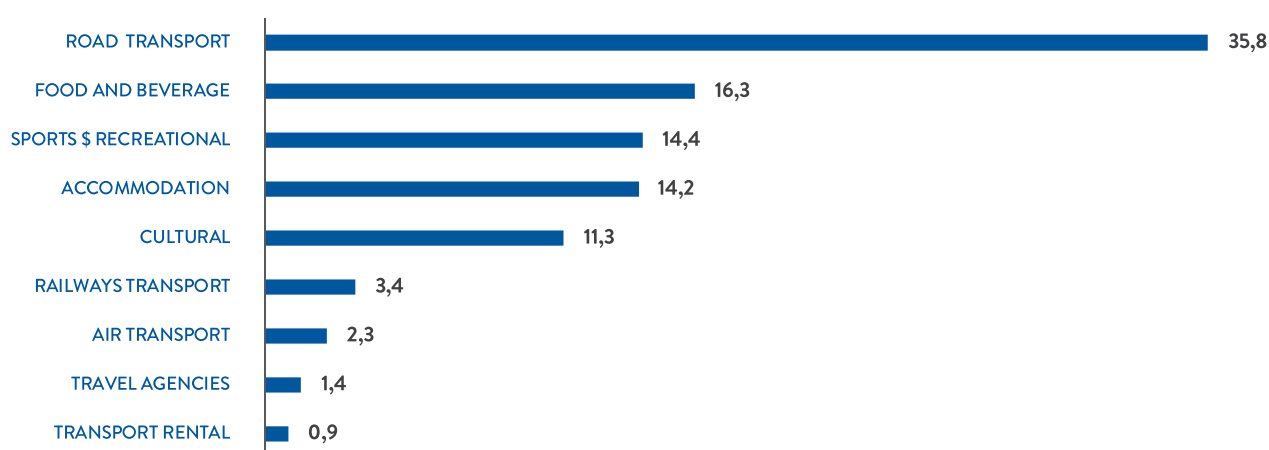
The data source for employment is the national labour survey. However, to distribute the total employment by tourism industries, the percentage distribution of employment data from DOTS-2017 has been used. Accordingly, TSA Table 7 is prepared and presented in Section VI.

The following figure (Figure 14) presents the percentage distribution of tourism employment by tourism specific industries. It shows that road transport services generates the majority of employment among tourism industries, with the estimated share of 35.8 percent.

## 8. Table 10: Non-monetary indicators

TSA Table 10 presents the non-monetary or quantitative indicators related to tourism. Depending on the availability of data, these indicators can be presented in a tabular form. TSA Table 10 is presented in Section VI.

Figure 14: Percentage distribution of tourism employment by industries, 2018



Source: TSA Table 7

## CHAPTER 4 IDENTIFICATION OF DATA GAPS

With respect to demand side data, the data limitation relates to the availability of estimated number of domestic visitors on annual basis. There is no official source – survey or non-survey based – which can be used to estimate the number of domestic visitor arrivals on annual basis. The DOTS-2017 provided the data on number of domestic visitors for 2017, after which there are no annual estimates of the same. Hence, a proxy indicator is proposed to be used. This proxy indicator is the number of visits to national parks. Since the national parks are ticketed tourist spots, the data on number of visits are available on annual basis. It is assumed that the growth in total number of domestic visitors is the same as the growth in number of domestic visits to national parks. Hence, the number of domestic visitors for 2018 is estimated as the number of domestic visitors for 2017 (as per DOTS, 2017) plus the number as obtained by assuming the same growth in domestic visitor arrivals as in number of domestic visits to national parks.





Besides, the data gaps are realised in the case of supply side data too. The SUT for 2012 has been used to update to that for 2018. Also, the SUT does not present the entire set of production sectors of the economy. It only depicts the domestic supply of tourism products and services and does not account for their imports. It is because of these reasons that the Tourism Product Ratios are expected to be abnormal for some cases. However, to mitigate this limitation, the administrative data have been used for the goods and services, for which abnormal product ratios were observed.



## CHAPTER 5

# CONCLUSIONS AND RECOMMENDATIONS

The TSA tables and accounts find that tourism contributes 4.25 percent to the national GDP and 1.56 percent to national employment.

This is on the back of a total of USD 1965 million tourism expenditure incurred by inbound, domestic and outbound tourists, taken together, within the economic territory of the country. Of this, 61 percent is accounted for by inbound tourism and the remaining 39 percent by domestic and outbound tourism.

In terms of GDP, tourism direct GDP (TDGDP) amounts to USD 1028 million for 2018, which works out to be 4.25 percent of total GDP of USD 24201 million. With respect to jobs, with 101,327 jobs in tourism sector, it is estimated to contribute 1.56 percent to total national employment.

The following figure presents a comparison of Zimbabwe with other neighbouring countries with respect to the contribution of tourism to respective country's GDP.

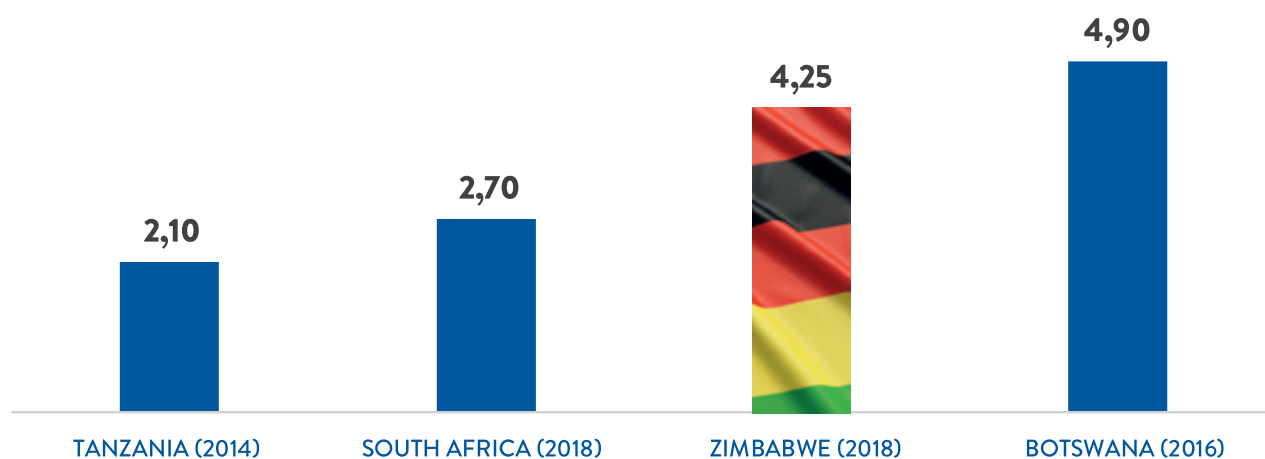


**Table 2: Tourism Aggregates, 2018**

Tourism Expenditure	Million USD	% share
Inbound	1199	61.0
Domestic and Outbound	766	39.0
Total Internal	1965	100.0
	GDP (Million USD)	Jobs (number)
Tourism	1028	101,327
Total	24201	6,485,431
Tourism share (%)	4.25	1.56

With regard to recommendations for future TSAs, it is recommended that the number of domestic visitors are estimated on annual basis, either through a primary survey or through administrative sources,

like data on visitor arrivals in accommodation establishments or at ticketed recreational sites etc.

**Figure 15: Cross-country comparison (% share of tourism to GDP)**

The next SUT is planned to be prepared for 2019 or 2020. The next TSA should be prepared within 4 or 5 years of the SUT year, so that the confrontation of demand side data with the supply side is more

plausible. This will result in better estimate of Tourism Product Ratios, Tourism Industry Ratios and eventually the contribution of tourism to economy.



# TSA TABLES AND ACCOUNTS



Tsowa Safari Island - Pool Deck Area



**TSA Table 1. Inbound tourism expenditure by products (2018)**

Products	Inbound tourism expenditure(US\$)		
	Tourists	Excursionists	Visitors
	(overnight visitors) (1.1)	(same-day visitors) (1.2)	(1.3) = (1.1) + (1.2)
Accommodation	26,61,51,518	18,264	26,61,69,782
Food and beverage	32,71,26,460	38,76,876	33,10,03,337
Railway transport	9,35,292	20,708	9,56,000
Road transport	8,16,07,299	4,35,220	8,20,42,519
Water transport	8,64,377	-	8,64,377
Air transport	1,35,12,226	98,365	1,36,10,591
Transport equipment rental	2,03,14,831	95,776	2,04,10,607
Travel/Tour agencies	1,57,18,150	2,45,049	1,59,63,199
Sport and recreational	12,87,47,584	83,05,580	13,70,53,164
Hunting	3,94,09,982	-	3,94,09,982
Arts and craft	4,20,56,235	14,37,203	4,34,93,439
<b>Health</b>			
Other consumption products	5,14,68,827	1,24,920	5,15,93,747
Other valuables	4,83,43,451	4,11,895	4,87,55,346
Other	14,56,50,344	18,92,374	14,75,42,718
<b>Total</b>	<b>1,18,19,06,575</b>	<b>1,69,62,232</b>	<b>1,19,88,68,807</b>

**TSA Table 1a. Percent distribution of inbound tourism expenditure by products (2018)**

	Overnight	Same-day	Total
<b>Accommodation</b>	22.5	0.1	22.2
<b>Food and beverage</b>	27.7	22.9	27.6
<b>Railway transport</b>	0.1	0.1	0.1
<b>Road transport</b>	6.9	2.6	6.8
<b>Water transport</b>	0.1	0.0	0.1
<b>Air transport</b>	1.1	0.6	1.1
<b>Transport equipment rental</b>	1.7	0.6	1.7
<b>Travel/Tour agencies</b>	1.3	1.4	1.3
<b>Sport and recreational</b>	10.9	49.0	11.4
<b>Hunting</b>	3.3	0.0	3.3
<b>Arts and craft</b>	3.6	8.5	3.6
<b>Health</b>	0.0	0.0	0.0
<b>Other consumption products</b>	4.4	0.7	4.3
<b>Other valuables</b>	4.1	2.4	4.1
<b>Other</b>	12.3	11.2	12.3
<b>Total</b>	100.0	100.0	100.0

TSA Table 2. Domestic tourism expenditure by products (2018)

Products	Domestic tourism expenditure(US\$)		
	Tourists	Excursionists	Visitors
	(overnight visitors) (1.1)	(same-day visitors) (1.2)	(1.3) = (1.1) + (1.2)
Accommodation	1,72,29,808	5,22,857	1,77,52,665
Food and beverage	5,54,52,795	1,92,18,731	7,46,71,527
Railway transport	18,68,043	4,75,812	23,43,855
Road transport	11,82,80,021	4,88,98,854	16,71,78,875
Water transport	2,95,972	82,373	3,78,345
Air transport	11,81,343	2,25,551	14,06,894
Transport equipment rental	29,01,840	12,61,648	41,63,487
Travel/Tour agencies	49,42,197	40,04,452	89,46,649
Sport and recreational	11,33,483	5,77,807	17,11,290
Hunting	15,548	14,353	29,900
Arts and craft	1,87,199	1,14,364	3,01,563
Health	1,78,19,015	62,12,779	2,40,31,794
Other consumption products	11,58,17,468	9,16,48,638	20,74,66,107
Other valuables	33,71,24,731	17,32,58,219	51,03,82,950
Other	1,72,29,808	5,22,857	1,77,52,665
<b>Total</b>	<b>5,54,52,795</b>	<b>1,92,18,731</b>	<b>7,46,71,527</b>

**TSA Table 2a. Percent distribution of domestic tourism expenditure by products (2018)**

	Overnight	Same-day	Total
Accommodation	5.1	0.3	3.5
Food and beverage	16.4	11.1	14.6
Railway transport	0.6	0.3	0.5
Road transport	35.1	28.2	32.8
Water transport	0.1	0.0	0.1
Air transport	0.4	0.1	0.3
Transport equipment rental	0.9	0.7	0.8
Travel/Tour agencies	1.5	2.3	1.8
Sport and recreational	0.3	0.3	0.3
Hunting	0.0	0.0	0.0
Arts and craft	0.1	0.1	0.1
Health	5.3	3.6	4.7
Other consumption products	11.4	25.1	16.1
Other valuables	8.3	14.4	10.4
Other	14.7	13.3	14.2
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>



TSA Table 3. Outbound tourism expenditure by products (2018)

Products	Outbound tourism expenditure(US\$)		
	Tourists	Excursionists	Visitors
	(overnight visitors) (1.1)	(same-day visitors) (1.2)	(1.3) = (1.1) + (1.2)
Accommodation	32,06,284	2,29,646	34,35,930
Food and beverage	1,88,45,878	21,98,431	2,10,44,310
Railway transport	6,72,109	73,091	7,45,200
Road transport	7,38,76,555	1,07,43,416	8,46,19,971
Water transport	2,11,735	11,320	2,23,055
Air transport	7,79,60,154	25,23,779	8,04,83,933
Transport equipment rental	46,876	8,173	55,049
Travel/Tour agencies	14,09,431	-	14,09,431
Sport and recreational	-	1	1
Hunting	-	-	-
Arts and crafts	-	-	-
Health	-	-	-
Other consumption Products	27,74,185	1,93,356	29,67,540
Other valuables	36,00,876	4,46,153	40,47,029
Other specify	5,20,81,539	4,28,854	5,25,10,394
Visa Fees	37,64,596	34,686	37,99,281
<b>Total</b>	<b>23,84,50,218</b>	<b>1,68,90,905</b>	<b>25,15,41,843</b>

**TSA Table 3a. Percent distribution of outbound tourism expenditure by products (2018)**

	Overnight	Same-day	Total
Accommodation	1.34	1.36	1.35
Food and beverage	7.90	13.02	8.24
Railway transport	0.28	0.43	0.29
Road transport	30.98	63.60	33.14
Water transport	0.09	0.07	0.09
Air transport	32.69	14.94	31.52
Transport equipment rental	0.02	0.05	0.02
Travel/Tour agencies	0.59	0.00	0.55
Sport and recreational	0.00	0.00	0.00
Hunting	0.00	0.00	0.00
Arts and crafts	0.00	0.00	0.00
Health	0.00	0.00	0.00
Other consumption Products	1.16	1.14	1.16
Other valuables	1.51	2.64	1.58
Other specify	21.84	2.54	20.56
Visa Fees	1.58	0.21	1.49
<b>Total</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>

**TSA Table 4. Internal tourism consumption, by products (2018) (US\$)**

	<b>Inbound</b>	<b>Domestic</b>	<b>Outbound</b>	<b>Total Internal</b>
<b>Accommodation</b>	26,61,69,782	1,77,52,665	34,35,930	28,73,58,377
<b>Food and beverage</b>	33,10,03,337	7,46,71,527	2,10,44,310	42,67,19,173
<b>Railway transport</b>	9,56,000	23,43,855	7,45,200	40,45,056
<b>Road transport</b>	8,20,42,519	16,71,78,875	8,46,19,971	33,38,41,365
<b>Water transport</b>	8,64,377	3,78,345	2,23,055	14,65,777
<b>Air transport</b>	1,36,10,591	14,06,894	8,04,83,933	9,55,01,417
<b>Transport equipment rental</b>	2,04,10,607	41,63,487	55,049	2,46,29,143
<b>Travel/Tour agencies</b>	1,59,63,199	89,46,649	14,09,431	2,63,19,279
<b>Sport and recreational</b>	13,70,53,164	17,11,290	1	13,87,64,454
<b>Hunting</b>	3,94,09,982	29,900	-	3,94,39,882
<b>Arts and craft</b>	4,34,93,439	3,01,563	-	4,37,95,002
<b>Health</b>	-	2,40,31,794	-	2,40,31,794
<b>Others</b>	24,78,91,811	20,74,66,107	6,33,24,244	51,86,82,162
<b>Total</b>	1,19,88,68,807	51,03,82,950	25,53,41,124	1,96,45,92,881

**TSA Table 4a. Percent distribution of internal tourism consumption by products (2018)**

	Inbound	Domestic	Outbound	Total Internal
Accommodation	22.2	3.5	1.3	14.6
Food and beverage	27.6	14.6	8.2	21.7
Railway transport	0.1	0.5	0.3	0.2
Road transport	6.8	32.8	33.1	17.0
Water transport	0.1	0.1	0.1	0.1
Air transport	1.1	0.3	31.5	4.9
Transport equipment rental	1.7	0.8	0.0	1.3
Travel/Tour agencies	1.3	1.8	0.6	1.3
Sport and recreational	11.4	0.3	0.0	7.1
Hunting	3.3	0.0	-	2.0
Arts and craft	3.6	0.1	-	2.2
Health	-	4.7	-	1.2
Others	20.7	40.6	24.8	26.4
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>



TSA Table 5: Production Account of Tourism Industries (US\$ million), 2018

Products	1 Accommodation for visitors	2 Food and beverage serving industry	3 Railway passenger transport	4 Road passenger transport
<b>A.1 Tourism characteristic products</b>				
1 Accommodation services	372.2	-	-	-
2 Food and beverage serving services	448.0	100.5	-	-
3 Railway passenger transport services	-	-	6.5	-
4 Road passenger transport services	-	-	283.7	74.7
5 Water passenger transport services	-	-	-	-
6 Air passenger transport services	-	-	-	-
7 Transport equipment rental	-	-	-	-
8 Travel Agencies and other reservations	-	-	-	-
9 Cultural services	-	-	-	-
10 Hunting	-	-	-	-
11 Arts and craft	-	-	-	-
12 Health	-	-	-	-
13 Others	-	-	-	-
<b>A.2 Non-Tourism specific products</b>				
<b>TOTAL output (at basic prices)</b>	<b>820.17</b>	<b>100.46</b>	<b>290.26</b>	<b>74.73</b>
Total intermediate consumption	359.14	57.49	155.94	40.28
<b>TOTAL GROSS VALUE ADDED</b>	<b>461.03</b>	<b>42.97</b>	<b>134.33</b>	<b>34.45</b>
Compensation of employees	335.35	26.08	72.99	22.51
Other taxes less subsidies on production	2.69	0.28	5.38	6.55
Gross Mixed income	-	-	-	-
Gross Operating surplus	125.68	16.89	61.34	11.94
<b>Gross Value Added at Basic Prices</b>	<b>463.72</b>	<b>43.25</b>	<b>139.70</b>	<b>41.00</b>

(contd.)

Products	5 Water passenger transport	6 Air passenger transport	7 Transport equipment rental	8 Travel Agencies and other reservation services
<b>A.1 Tourism characteristic products</b>				
1 Accommodation services	-	-	-	-
2 Food and beverage serving services	-	-	-	-
3 Railway passenger transport services	-	-	-	-
4 Road passenger transport services	-	-	-	-
5 Water passenger transport services	65.3	-	-	-
6 Air passenger transport services	-	130.6	-	-
7 Transport equipment rental	-	-	12.5	-
8 Travel Agencies and other reservations	-	-	-	82.3
9 Cultural services	-	-	-	-
10 Hunting	-	-	-	-
11 Arts and craft	-	-	-	-
12 Health	-	-	-	-
13 Others	-	-	-	-
<b>A.2 Non-Tourism specific products</b>				
<b>TOTAL output (at basic prices)</b>	<b>65.29</b>	<b>130.59</b>	<b>12.48</b>	<b>82.27</b>
Total intermediate consumption	-	62.38	5.09	44.35
<b>TOTAL GROSS VALUE ADDED</b>	<b>65.29</b>	<b>68.21</b>	<b>7.39</b>	<b>37.93</b>
Compensation of employees	-	71.51	2.96	17.07
Other taxes less subsidies on production	-	-	-	-
Gross Mixed income	-	-	-	-
Gross Operating surplus	65.29	(3.30)	4.44	20.86
<b>Gross Value Added at Basic Prices</b>	<b>65.29</b>	<b>68.21</b>	<b>7.39</b>	<b>37.93</b>

(contd.)

Products	9 Cultural industry	10 Sports and recreational industry	11 Retail trade of country specific goods	12 Other tourism industries
<b>A.1 Tourism characteristic products</b>				
1 Accommodation services	-	-	-	-
2 Food and beverage serving services	-	-	5.8	-
3 Railway passenger transport services	-	-	-	-
4 Road passenger transport services	-	-	-	-
5 Water passenger transport services	-	-	-	-
6 Air passenger transport services	-	-	-	-
7 Transport equipment rental	-	-	-	-
8 Travel Agencies and other reservations	-	-	-	-
9 Cultural services	183.0	3.4	-	-
10 Hunting	-	31.9	-	-
11 Arts and craft	1.2	54.4	-	-
12 Health	-	-	-	31.8
13 Others	-	-	130.8	405.8
<b>A.2 Non-Tourism specific products</b>				
<b>TOTAL output (at basic prices)</b>	<b>184.27</b>	<b>89.66</b>	<b>136.56</b>	<b>437.65</b>
Total intermediate consumption	119.77	5.20	3.93	231.04
<b>TOTAL GROSS VALUE ADDED</b>	<b>64.50</b>	<b>84.46</b>	<b>132.63</b>	<b>206.62</b>
Compensation of employees	50.41	3.05	1.10	157.65
Other taxes less subsidies on production	-	-	-	-
Gross Mixed income	-	-	-	-
Gross Operating surplus	14.10	81.41	131.53	48.96
<b>Gross Value Added at Basic Prices</b>	<b>64.50</b>	<b>84.46</b>	<b>132.63</b>	<b>206.62</b>

(contd.)

Products	Total Tourism Industries	Other Industries	Gross Value of Output of domestic producers at basic prices
<b>A.1 Tourism characteristic products</b>			
<b>1 Accommodation services</b>	372.2	-	372.2
<b>2 Food and beverage serving services</b>	554.3	-	554.3
<b>3 Railway passenger transport services</b>	6.5	-	6.5
<b>4 Road passenger transport services</b>	358.5	-	358.5
<b>5 Water passenger transport services</b>	65.3	-	65.3
<b>6 Air passenger transport services</b>	130.6	-	130.6
<b>7 Transport equipment rental</b>	12.5	-	12.5
<b>8 Travel Agencies and other reservations</b>	82.3	-	82.3
<b>9 Cultural services</b>	186.4	-	186.4
<b>10 Hunting</b>	31.9	-	31.9
<b>11 Arts and craft</b>	55.6	-	55.6
<b>12 Health</b>	31.8	-	31.8
<b>13 Others</b>	536.6	-	536.6
<b>A.2 Non-Tourism specific products</b>	-	<b>37,069.0</b>	<b>37,069.0</b>
<b>TOTAL output (at basic prices)</b>	<b>2,424.41</b>	<b>37,069</b>	<b>39,493</b>
Total intermediate consumption	<b>1,084.61</b>	16,583.56	17,668.17
<b>TOTAL GROSS VALUE ADDED</b>	<b>1,339.80</b>	<b>20,485.41</b>	<b>21,825.21</b>
Compensation of employees	<b>760.67</b>	-	-
Other taxes less subsidies on production	<b>14.89</b>	207.88	222.77
Gross Mixed income	-	-	-
Gross Operating surplus	579.13	-	-
<b>Gross Value Added at Basic Prices</b>	<b>1,354.69</b>	<b>20,693.29</b>	<b>22,047.98</b>



TSA Table 6: Tourism Demand and Supply (US\$ million), 2018

Products	1 Accommodation for visitors	Tourism share	2 Food and beverage serving industry	Tourism Share
<b>A.1 Tourism characteristic products</b>				
1 Accommodation services for visitors	372.2	287.4	-	-
2 Food and beverage serving services	448.0	344.9	100.5	77.3
3 Railway passenger transport services	-	-	-	-
4 Road passenger transport services	-	-	-	-
5 Water passenger transport services	-	-	-	-
6 Air passenger transport services	-	-	-	-
7 Transport equipment rental	-	-	-	-
8 Travel Agencies and other reservations	-	-	-	-
9 Cultural services	-	-	-	-
Hunting	-	-	-	-
Arts and craft	-	-	-	-
Health	-	-	-	-
Others	-	-	-	-
<b>A.1 Non-Tourism specific products</b>				
<b>TOTAL output (at basic prices)</b>	<b>820.2</b>	<b>632.3</b>	<b>100.5</b>	<b>77.3</b>
<b>Tourism Industry Ratios</b>	-	<b>0.77</b>	-	<b>0.77</b>
Total intermediate consumption	359.1	-	57.5	-
<b>TOTAL GROSS VALUE ADDED</b>	<b>461.0</b>	<b>355.4</b>	<b>43.0</b>	<b>33.1</b>
Other taxes less subsidies on production	2.7	-	0.3	-
<b>Gross Value Added at Basic Prices</b>	<b>463.7</b>	-	<b>43.2</b>	-

(contd.)

Products	3 Railway passenger transport	Tourism share	4 Road passenger transport	Tourism share
<b>A.1 Tourism characteristic products</b>				
1 Accommodation services for visitors	-	-	-	-
2 Food and beverage serving services	-	-	-	-
3 Railway passenger transport services	6.5	4.0	-	-
4 Road passenger transport services	283.7	264.2	74.7	69.6
5 Water passenger transport services	-	-	-	-
6 Air passenger transport services	-	-	-	-
7 Transport equipment rental	-	-	-	-
8 Travel Agencies and other reservations	-	-	-	-
9 Cultural services	-	-	-	-
Hunting	-	-	-	-
Arts and craft	-	-	-	-
Health	-	-	-	-
Others	-	-	-	-
<b>A.1 Non-Tourism specific products</b>				
<b>TOTAL output (at basic prices)</b>	<b>290.3</b>	<b>268.3</b>	<b>74.7</b>	<b>69.6</b>
<b>Tourism Industry Ratios</b>	-	<b>0.92</b>	-	<b>0.93</b>
Total intermediate consumption	155.9	-	40.3	-
<b>TOTAL GROSS VALUE ADDED</b>	<b>134.3</b>	<b>124.2</b>	<b>34.5</b>	<b>32.1</b>
Other taxes less subsidies on production	5.4	-	6.6	-
<b>Gross Value Added at Basic Prices</b>	<b>139.7</b>	-	<b>41.0</b>	-

(contd.)

Products	5 Water passenger transport	Tourism share	6 Air passenger transport	Tourism share
<b>A.1 Tourism characteristic products</b>				
1 Accommodation services for visitors	-	-	-	-
2 Food and beverage serving services	-	-	-	-
3 Railway passenger transport services	-	-	-	-
4 Road passenger transport services	-	-	-	-
5 Water passenger transport services	65.3	1.5	-	-
6 Air passenger transport services	-	-	130.6	95.5
7 Transport equipment rental	-	-	-	-
8 Travel Agencies and other reservations	-	-	-	-
9 Cultural services	-	-	-	-
Hunting	-	-	-	-
Arts and craft	-	-	-	-
Health	-	-	-	-
Others	-	-	-	-
<b>A.1 Non-Tourism specific products</b>				
<b>TOTAL output (at basic prices)</b>	<b>65.3</b>	<b>1.5</b>	<b>130.6</b>	<b>95.5</b>
<b>Tourism Industry Ratios</b>	-	<b>0.02</b>	-	<b>0.73</b>
Total intermediate consumption	-	-	62.4	-
<b>TOTAL GROSS VALUE ADDED</b>	<b>65.3</b>	<b>1.5</b>	<b>68.2</b>	<b>49.9</b>
Other taxes less subsidies on production	-	-	-	-
<b>Gross Value Added at Basic Prices</b>	<b>65.3</b>	-	<b>68.2</b>	-

(contd.)

Products	7 Transport equipment rental	Tourism share	8 Travel Agencies and other reservation services	Tourism share
<b>A.1 Tourism characteristic products</b>				
1 Accommodation services for visitors	-	-	-	-
2 Food and beverage serving services	-	-	-	-
3 Railway passenger transport services	-	-	-	-
4 Road passenger transport services	-	-	-	-
5 Water passenger transport services	-	-	-	-
6 Air passenger transport services	-	-	-	-
7 Transport equipment rental	12.5	12.0	-	-
8 Travel Agencies and other reservations	-	-	82.3	26.3
9 Cultural services	-	-	-	-
Hunting	-	-	-	-
Arts and craft	-	-	-	-
Health	-	-	-	-
Others	-	-	-	-
<b>A.1 Non-Tourism specific products</b>				
<b>TOTAL output (at basic prices)</b>	<b>12.5</b>	<b>12.0</b>	<b>82.3</b>	<b>26.3</b>
<b>Tourism Industry Ratios</b>	-	<b>0.96</b>	-	<b>0.32</b>
Total intermediate consumption	5.1	-	44.3	-
<b>TOTAL GROSS VALUE ADDED</b>	<b>7.4</b>	<b>7.1</b>	<b>37.9</b>	<b>12.1</b>
Other taxes less subsidies on production	-	-	-	-
<b>Gross Value Added at Basic Prices</b>	<b>7.4</b>	-	<b>37.9</b>	-



(contd.)

Products	9 Cultural industry	Tourism share	10 Sports and recreational industry	Tourism share
<b>A.1 Tourism characteristic products</b>				
1 Accommodation services for visitors	-	-	-	-
2 Food and beverage serving services	-	-	-	-
3 Railway passenger transport services	-	-	-	-
4 Road passenger transport services	-	-	-	-
5 Water passenger transport services	-	-	-	-
6 Air passenger transport services	-	-	-	-
7 Transport equipment rental	-	-	-	-
8 Travel Agencies and other reservations	-	-	-	-
9 Cultural services	183.0	136.2	3.4	2.5
Hunting	-	-	31.9	21.1
Arts and craft	1.2	1.0	54.4	42.8
Health	-	-	-	-
Others	-	-	-	-
<b>A.1 Non-Tourism specific products</b>				
<b>TOTAL output (at basic prices)</b>	<b>184.3</b>	<b>137.2</b>	<b>89.7</b>	<b>66.4</b>
<b>Tourism Industry Ratios</b>	-	<b>0.74</b>	-	<b>0.74</b>
Total intermediate consumption	119.8	-	5.2	-
<b>TOTAL GROSS VALUE ADDED</b>	<b>64.5</b>	<b>48.0</b>	<b>84.5</b>	<b>62.6</b>
Other taxes less subsidies on production	-	-	-	-
<b>Gross Value Added at Basic Prices</b>	<b>64.5</b>	-	<b>84.5</b>	-

(contd.)

Products	11 Retail trade of country specific goods	Tourism share	12 Other tourism industries	Tourism share
<b>A.1 Tourism characteristic products</b>				
1 Accommodation services for visitors	-	-	-	-
2 Food and beverage serving services	5.8	4.5	-	-
3 Railway passenger transport services	-	-	-	-
4 Road passenger transport services	-	-	-	-
5 Water passenger transport services	-	-	-	-
6 Air passenger transport services	-	-	-	-
7 Transport equipment rental	-	-	-	-
8 Travel Agencies and other reservations	-	-	-	-
9 Cultural services	-	-	-	-
Hunting	-	-	-	-
Arts and craft	-	-	-	-
Health	-	-	31.8	24.0
Others	130.8	-	405.8	392.3
<b>A.1 Non-Tourism specific products</b>				
<b>TOTAL output (at basic prices)</b>	<b>136.6</b>	<b>4.5</b>	<b>437.7</b>	<b>416.3</b>
<b>Tourism Industry Ratios</b>	-	<b>0.03</b>	-	<b>0.95</b>
Total intermediate consumption	3.9	-	231.0	-
<b>TOTAL GROSS VALUE ADDED</b>	<b>132.6</b>	<b>4.3</b>	<b>206.6</b>	<b>196.5</b>
Other taxes less subsidies on production	-	-	-	-
<b>Gross Value Added at Basic Prices</b>	<b>132.6</b>	-	<b>206.6</b>	-

(contd.)

Products	13. Other Non-tourism industries	Tourism share	Total Output	Tourism share
<b>A.1 Tourism characteristic products</b>				
1 Accommodation services for visitors	-	-	372.2	287.4
2 Food and beverage serving services	-	-	554.3	426.7
3 Railway passenger transport services	-	-	6.5	4.0
4 Road passenger transport services	-	-	358.5	333.8
5 Water passenger transport services	-	-	65.3	1.5
6 Air passenger transport services	-	-	130.6	95.5
7 Transport equipment rental	-	-	12.5	12.0
8 Travel Agencies and other reservations	-	-	82.3	26.3
9 Cultural services	-	-	186.4	138.8
Hunting	-	-	31.9	21.1
Arts and craft	-	-	55.6	43.8
Health	-	-	31.8	24.0
Others	-	-	536.6	518.7
<b>A.1 Non-Tourism specific products</b>	<b>37,069.0</b>	-	<b>37,069.0</b>	-
<b>TOTAL output (at basic prices)</b>	<b>37,069.0</b>	-	<b>39,493.4</b>	<b>1,807.2</b>
<b>Tourism Industry Ratios</b>		-	-	-
Total intermediate consumption	16,583.6	-	17,668.2	-
<b>TOTAL GROSS VALUE ADDED</b>	<b>20,485.4</b>	-	<b>21,825.2</b>	<b>926.8</b>
Other taxes less subsidies on production	207.9	-	222.8	9.5
<b>Gross Value Added at Basic Prices</b>	<b>20,693.3</b>	-	<b>22,048.0</b>	<b>936.3</b>
<b>Net Taxes on products</b>			<b>2,153.2</b>	<b>91.4</b>
<b>GDP at mp</b>			<b>24,201.2</b>	<b>1,027.7</b>
<b>Share of Tourism GDP to overall GDP</b>				<b>4.25</b>

TSA Table 7: Tourism Employment (in numbers), 2018

2018									
	Paid employment			Self-employment			TOTAL		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
<b>Accommodation</b>	7,146	4,719	11,865	1,126	1,383	2,509	8,272	6,102	14,374
<b>Food and beverage serving industry</b>	6,609	6,118	12,727	562	3,235	3,797	7,171	9,353	16,524
<b>Railways passenger transport</b>	2,668	690	3,358	112		112	2,780	690	3,470
<b>Road passenger transport</b>	22,562	169	22,731	11,796	1,737	13,533	34,358	1,906	36,264
<b>Air passenger transport</b>	1,278	1,094	2,372				1,278	1,094	2,372
<b>Transport equipment rental</b>	222	353	575	313		313	535	353	888
<b>Travel agencies and other reservation services industry</b>	611	471	1,082	313		313	924	471	1,395
<b>Cultural industry</b>	4,038	760	4,798	5,736	960	6,696	9,774	1,720	11,494
<b>Sports and recreational industry</b>	9,714	2,033	11,747	2,220	579	2,799	11,934	2,612	14,546
<b>TOTAL</b>	54,848	16,407	71,255	22,178	7,894	30,072	77,026	24,301	1,01,327



**TSA Table 10a: Non-monetary indicators, 2018****Number of trips and overnights by type of tourism and categories of visitors (in million numbers)**

	Inbound Tourism			Domestic Tourism			Outbound Tourism		
	Same-day	Overnight	Total	Same-day	Overnight	Total	Same-day	Overnight	Total
<b>Number of trips (arrivals)</b>									
<b>2017</b>	0.21	2.42	2.64	6.38	8.80	15.18	0.65	2.12	2.77
<b>2018</b>	0.30	2.58	2.88	8.81	12.16	20.97	0.70	2.29	2.99
<b>Number of overnights</b>									
<b>2017</b>	-	21	21	-	88	88	-	34	34
<b>2018</b>	-	22	22	-	122	122	-	37	37

**TSA Table 10b: Non-monetary indicators, 2018****Inbound tourism: Number of arrivals and overnights by means of transport**

Transport	2017		2018	
	Number of arrivals	Number of overnights	Number of arrivals	Number of overnights
<b>Air</b>	3,10,134	26,67,152	3,37,194	28,99,868
<b>Land</b>	21,12,796	1,81,70,046	22,42,780	1,92,87,908
<b>TOTAL</b>	24,22,930	2,08,37,198	25,79,974	2,21,87,776

**TSA Table 10c: Non-monetary indicators, 2018****Number of establishments and capacity by forms of accommodation**

	2017			2018		
	Hotels	Lodges	Others	Hotels	Lodges	Others
<b>Number of Establishments</b>	95	165	251	98	174	345
<b>Capacity (rooms)</b>	6,483	2,030	*	6,543	2,074	*
<b>Capacity (beds)</b>	12,772	3,912	*	12,902	4,407	*
<b>Capacity Utilization / Occupancy Rate (rooms)</b>	48%	*	*	53%	*	*
<b>Capacity Utilization / Occupancy Rate (beds)</b>	35%	*	*	39%	*	*

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