

# Arrivals Report, 2024

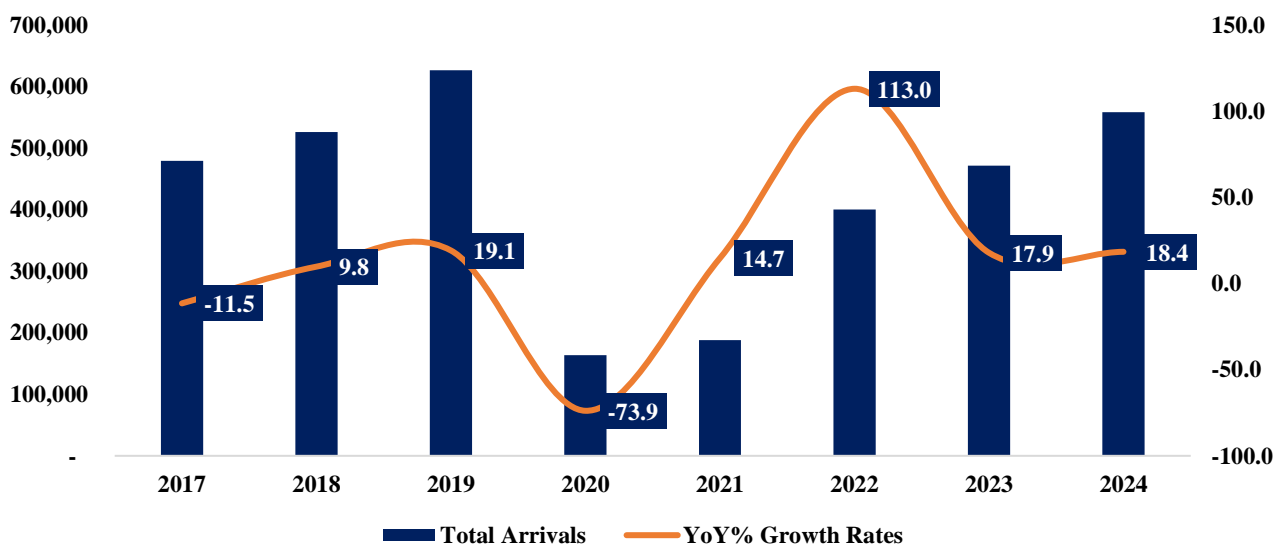
## 1. Executive Summary

Namibia's tourism sector experienced a strong recovery in 2024, surpassing pre-pandemic (2017/2018) levels with 558,333 total arrivals, marking an 18.4% increase from 2023. Regional and international travelers drove this growth, with the peak season occurring from July to September. Strategic improvements in air connectivity, particularly with Central Europe, and the upcoming e-Visa system are expected to continue fueling positive momentum. Future success will depend on maintaining gains from the DACH<sup>1</sup> market, diversifying source countries, enhancing the tourism experience, and upgrading infrastructure to support sustainable growth.

## 2. Analysis

In 2024, Namibia's tourism sector saw significant growth, reaching 558,333 arrivals a notable 18.4% increase from 2023. The sector surpassed pre-pandemic levels (2017/2018), which could be driven by strategic marketing and enhanced air connectivity. See figure 1.

Figure 1: Total Arrivals Trends for Namibia 2017 - 2024



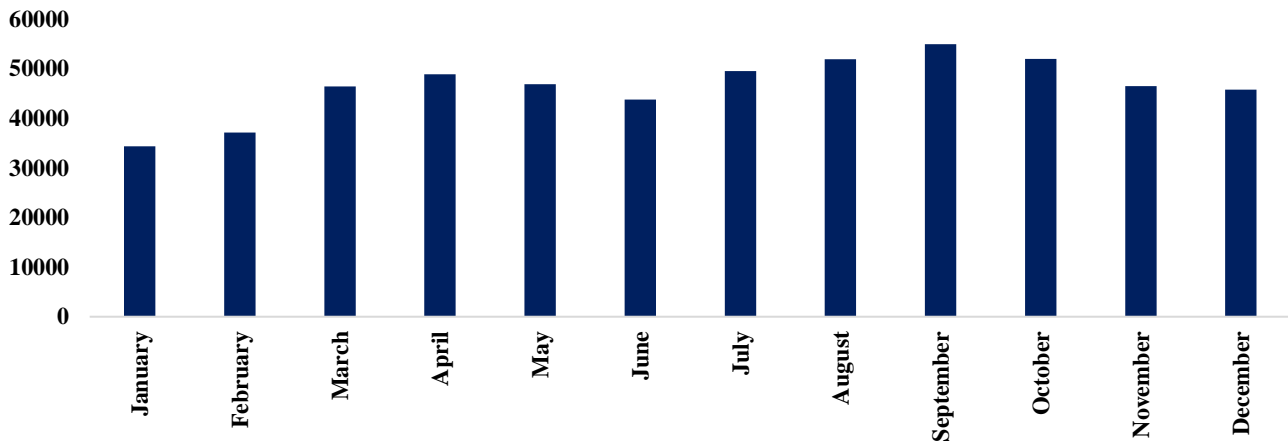
Source: NAC & HEI RESEARCH

Figure 2 Namibia's tourism shows clear seasonality, with the highest number of arrivals concentrated from July to October. September saw the highest figure, with 54, 954 arrivals, while

<sup>1</sup> Germany, Austria, and Switzerland (DACH countries)

January recorded the lowest at 34, 399. This seasonal peak underscores the importance of effective planning and resource allocation during these months.

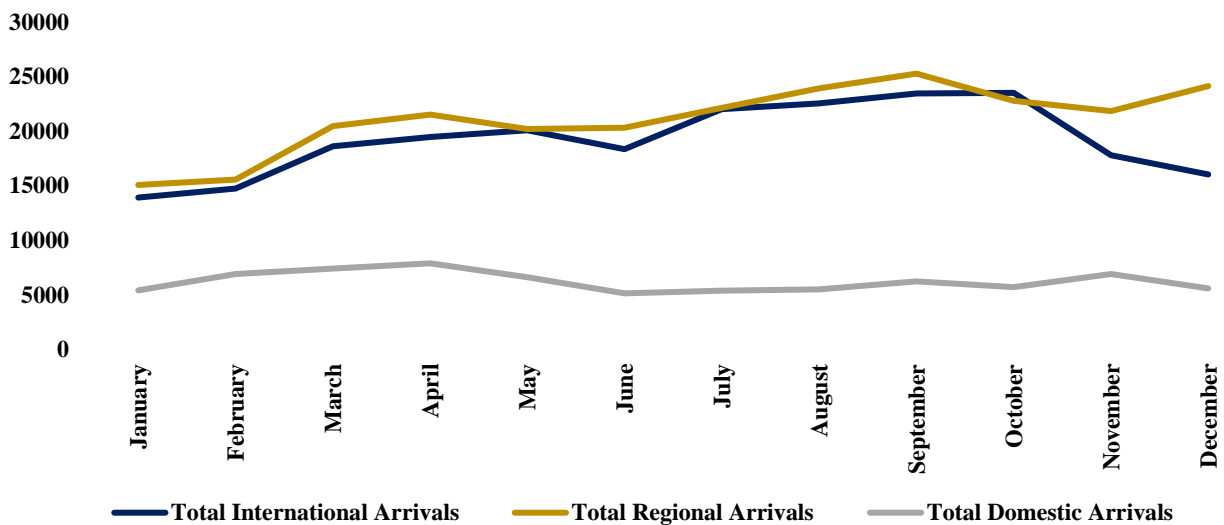
**Figure 2: Monthly Total Arrivals (2024)**



Source: NAC & HEI RESEARCH

During the period under review, regional visitors consistently outnumbered international tourists, emphasising the critical role of neighbouring countries as a source market. Domestic tourism contributed, though to a lesser extent. A shift was observed towards the end of the year, with regional arrivals increasing as international arrivals declined. These trends highlight the need for strategies to boost international arrivals, especially during off-peak months. See figure 3.

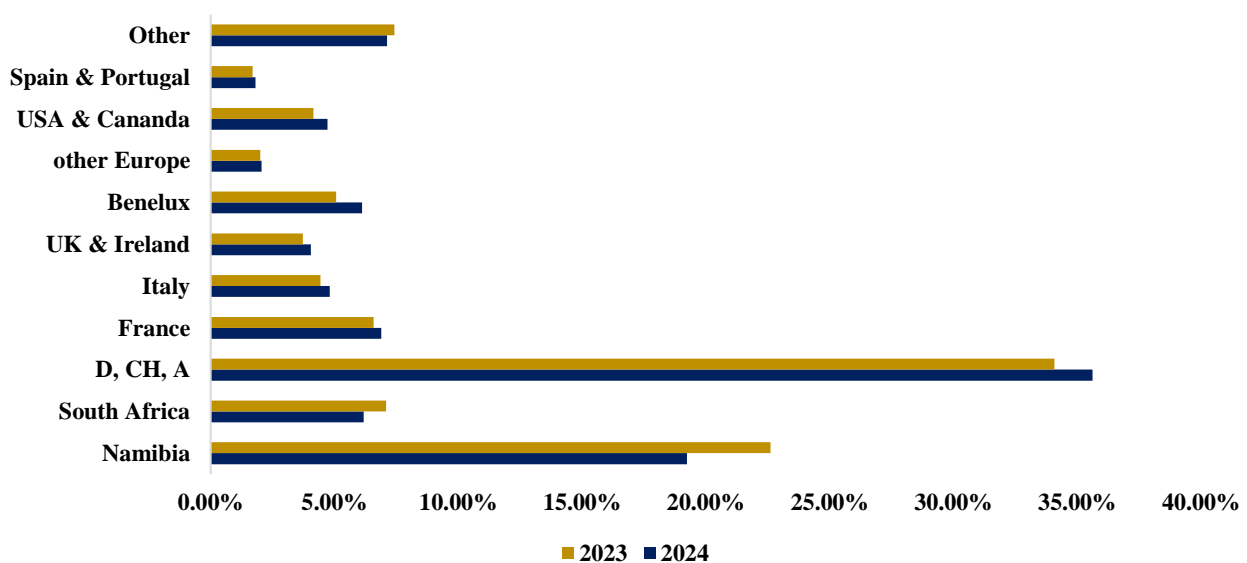
**Figure 3: International, Regional and Domestic Arrivals by Month (2024)**



Source: NAC & HEI RESEARCH

On the occupancy rate side, visitors from DACH countries (Germany, Austria, and Switzerland) consistently contributed the largest share of occupancy in 2024, making up 35.63% of total arrivals. This highlights the importance of the DACH market to Namibia's tourism sector. While there was relative stability in market share across most countries of origin between 2023 and 2024 indicating effective marketing in key regions visitors from Namibia, South Africa, and the United Kingdom saw an increase in their market share. Conversely, visitors from France, Italy, Spain, and Portugal experienced a decrease, suggesting the need to reassess and potentially enhance marketing strategies targeting these European nations. Namibia's tourism sector relies heavily on the DACH region, underlining the importance of maintaining and strengthening relationships with these markets while exploring opportunities to diversify and increase arrivals from other regions. See figure 4 below.

**Figure 4: Occupancy by country of origin, Namibia (2023 and 2024)**



Source: HANS, HEI Research

### 3. Outlook

Namibia's tourism sector is set for continued growth, fueled by improvements in air connectivity, including direct flights to European markets such as Frankfurt and the upcoming Munich route. New routes from Angola will strengthen regional links, building on Angola's significance as a source market. The introduction of the e-Visa system in March 2025 will ease travel by addressing visa processing delays.

While these developments present promising opportunities, challenges such as economic uncertainties, global events, and natural disasters must be managed proactively. There are also opportunities to diversify source markets beyond the DACH region, enhance sustainable tourism practices, and build stronger international partnerships. With strategic planning and leveraging its strengths, Namibia is well-positioned to maximise the economic benefits from its expanding tourism sector.