

Occupancy Rate

June 2025

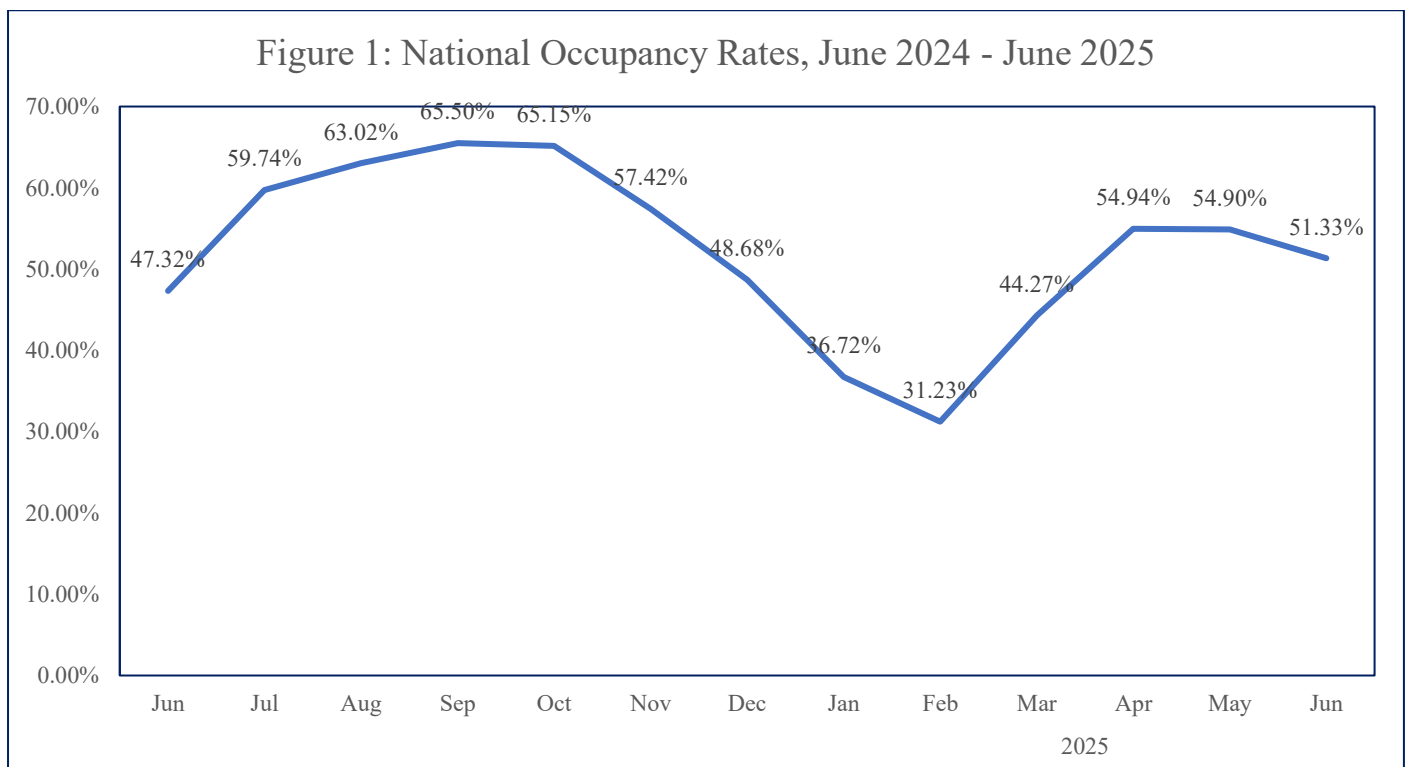
Executive Summary

The national occupancy rate declined slightly to 51.33% in June 2025, down from 54.9% recorded in May. This marginal decrease aligns with seasonal trends, as June typically represents a slower month ahead of the tourism sector's peak period, which spans from July to September.

Notably, June 2025 outperformed both the corresponding month of June 2024 (50.41%) and June 2019, which recorded an occupancy rate of 51.21%, signaling a modest year-on-year improvement in tourism activity.

For the second quarter of 2025, the average occupancy rate stood at 54.12%, reflecting a near-complete recovery to pre-pandemic levels when compared to Q2 2019 (53.98%). However, the figure remains approximately 1.5% lower than that recorded in Q2 2024.

Analysis

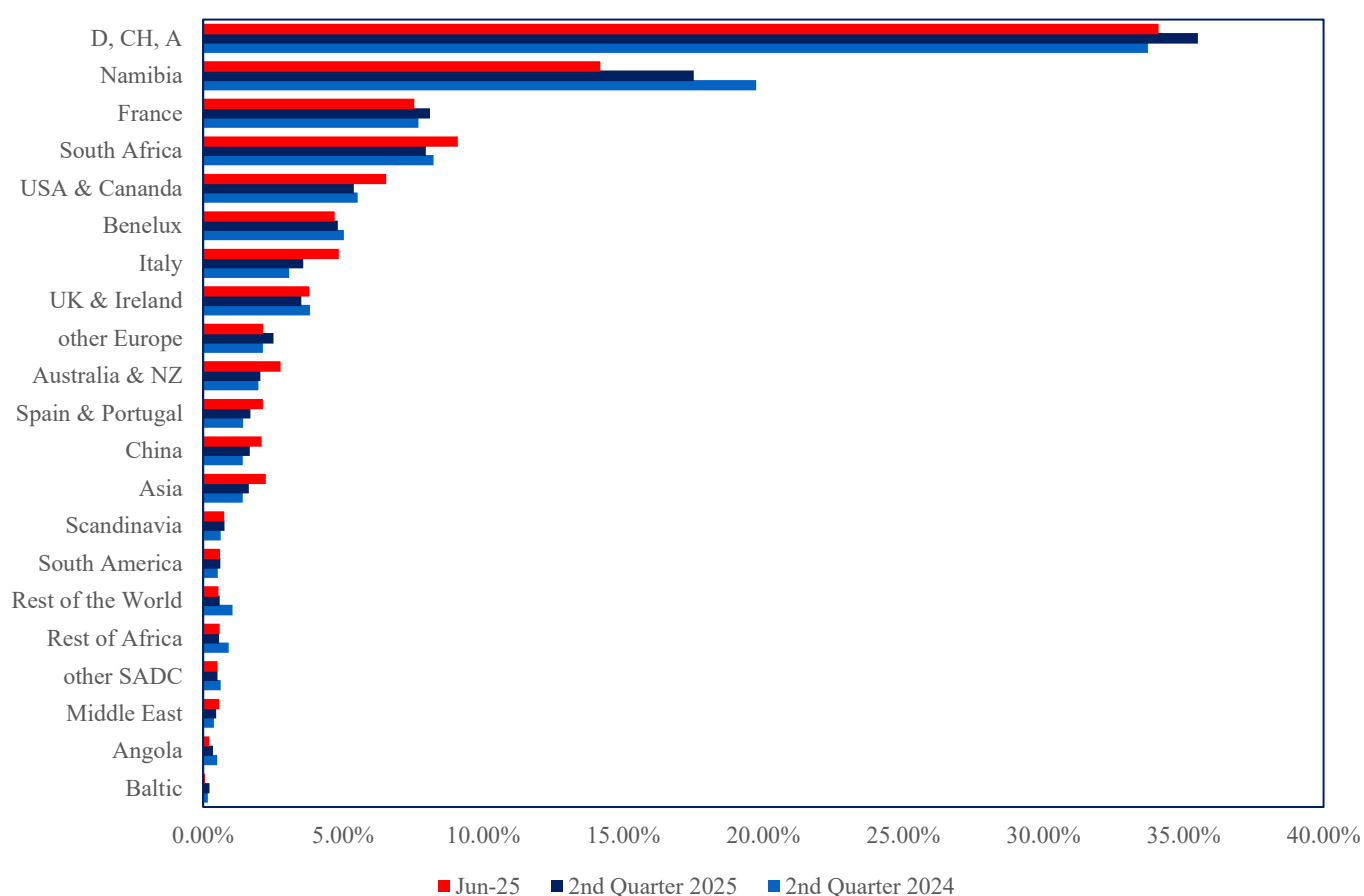


Source: HANS, HEI Research

Nationally, the average occupancy rate stood at 51.33%, with leisure travel being the dominant purpose of stay, accounting for 92.46% of all bookings. Business and conference travel made up much smaller shares, at 7.43% and 0.10%, respectively.

- Coastal Region reported the highest occupancy rate at 62.37%, strongly driven by leisure travel, which accounted for 88.02% of all stays. Business travel was notably low at 11.95%.
- Northern Region had an occupancy rate of 53.68%, with a dominance of leisure travel at 98.73%, Business travel made had a rate of 1.27%.
- Central Region, despite including key urban centres, recorded a lower occupancy rate of 49.20%. However, it had the highest share of business at 35.60%, which mostly indicate that the region serves as the country's administrative and commercial hub. Leisure stood at 63.76%, and conference, while still low, was highest here at 0.64%.
- Southern Region had the lowest occupancy rate at 48.25%, but like the north, it was driven primarily by leisure (97.75%), with very limited business (2.23%) and conference (0.02%) activity.

Figure 2: Occupancy Rate by Country of Origin, Q2: 25 and Q2:24

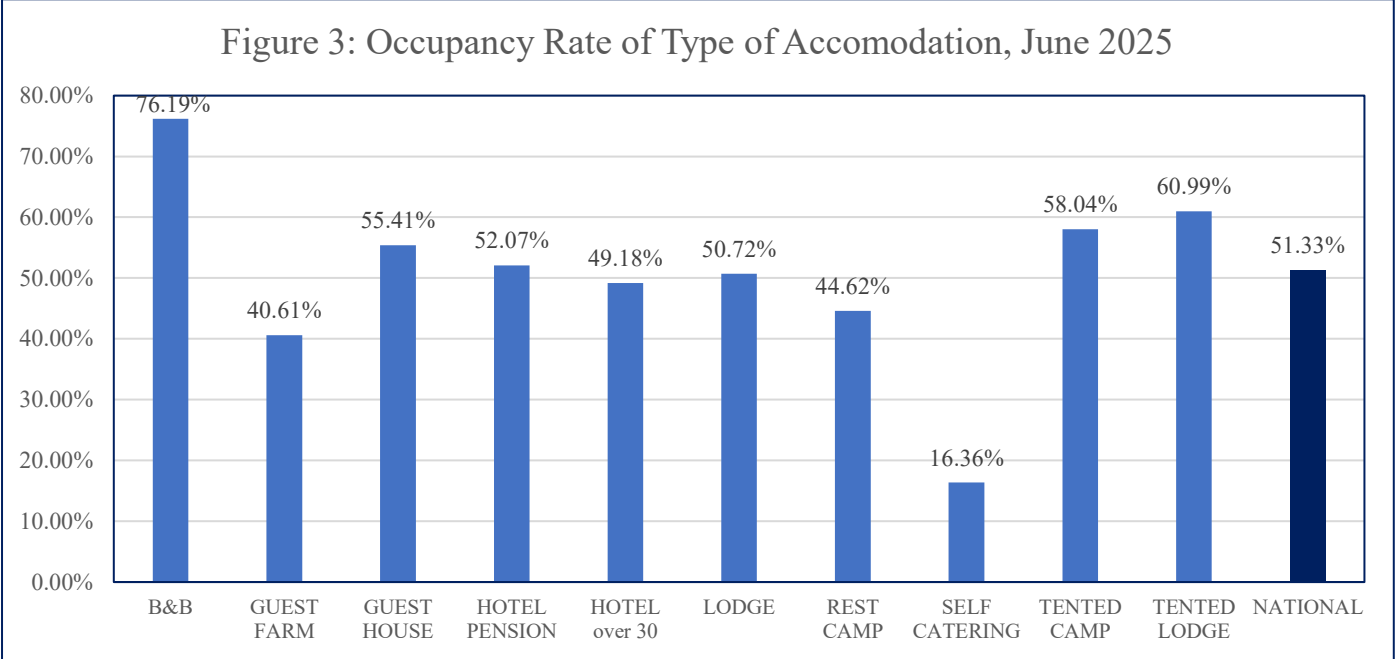


Source: HANS, HEI Research

In the second quarter of 2025, the D, CH, A region (Germany, Switzerland, and Austria) remained Namibia's largest tourist's occupancy rate, showing 35.51%, up 1.38% from the 33.73% observed in the same period of 2024. This trend also shows in June 2025, with the region leading at 34.11%. These figures highlight the continued strong interest and consistent market share from German-speaking countries and the recent flight that were introduced early this year from the region.

Domestic travel saw a notable decline over the period. Namibian residents had a rate of 19.74% in Q2 2024, which dropped to 17.52% in Q2 2025. In June 2025 the occupancy rate for Namibian residents was 14.18%.

France residents had an occupancy rate of 8.10% in Q2 2025 an increase of 0.41% from the 7.69% observed in Q2 2024. For the month of June 2025, the occupancy rate of the residents from the region was at 7.54%.



Source: HANS, HEI Research

Occupancy rate by accommodation types in the country for June 2025 had B&B (bed and breakfast) at the highest amongst all with an occupancy rate of 76.19%. This was then followed by Tented lodges at 60.99% and then Tented camp at the third position with 58.04%.

Guest Farm, Rest Camp, Hotel over 30, Lodge, Hotel Pension and Guest house all received an occupancy rate between the range of 40.61% and 55.41%. Self-catering was the least with a rate of 16.36% of the available space being taken up for the month.

Outlook/Sentiment

Namibia’s tourism sector continues to be anchored by strong arrivals from the D, CH, A region, with growing interest from long-haul markets such as the USA, Canada, Italy, and Australia. As the country enters the peak period for tourism, we anticipate the rate to get up to more than 60%, similar to the year 2024. The latest flight connecting Walvis Bay and Johannesburg South Africa will also serve as an easy access to the tourism destination.