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Occupancy Rate

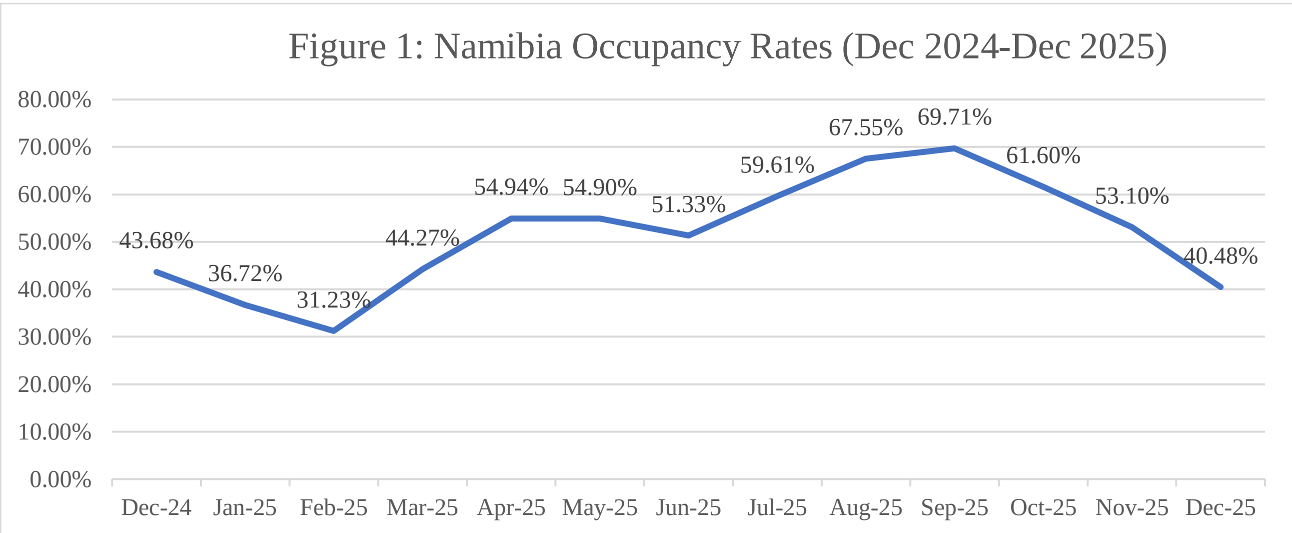
December 2025

1. Executive summary

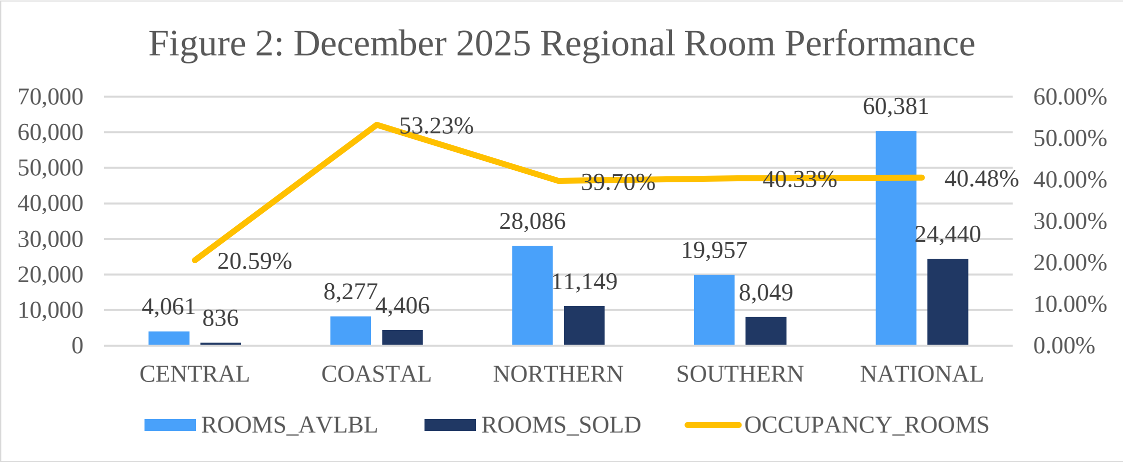
Namibia's hotel sector recorded a national room occupancy rate of 40.48% in December 2025, representing a 3.2 percentage point decline compared to December 2024 (43.68%). This decline follows the seasonal downturn observed from November 2025 (53.10%) and aligns with broader annual trends, with February 2025 identified as the lowest occupancy month in the 12-month period from December 2024 to December 2025. The average occupancy for the year stood at 51.47%, indicating that December's performance falls significantly below the yearly average. The decline reflects both seasonal effects and a potential softening in tourism demand.

The Coastal region recorded the strongest occupancy at 53.23% during the month under review, while the Central region lagged significantly at just 20.59%. Leisure travel dominated at 97.83% of total room sales, with business travel minimal at 1.64%.

2. Analysis



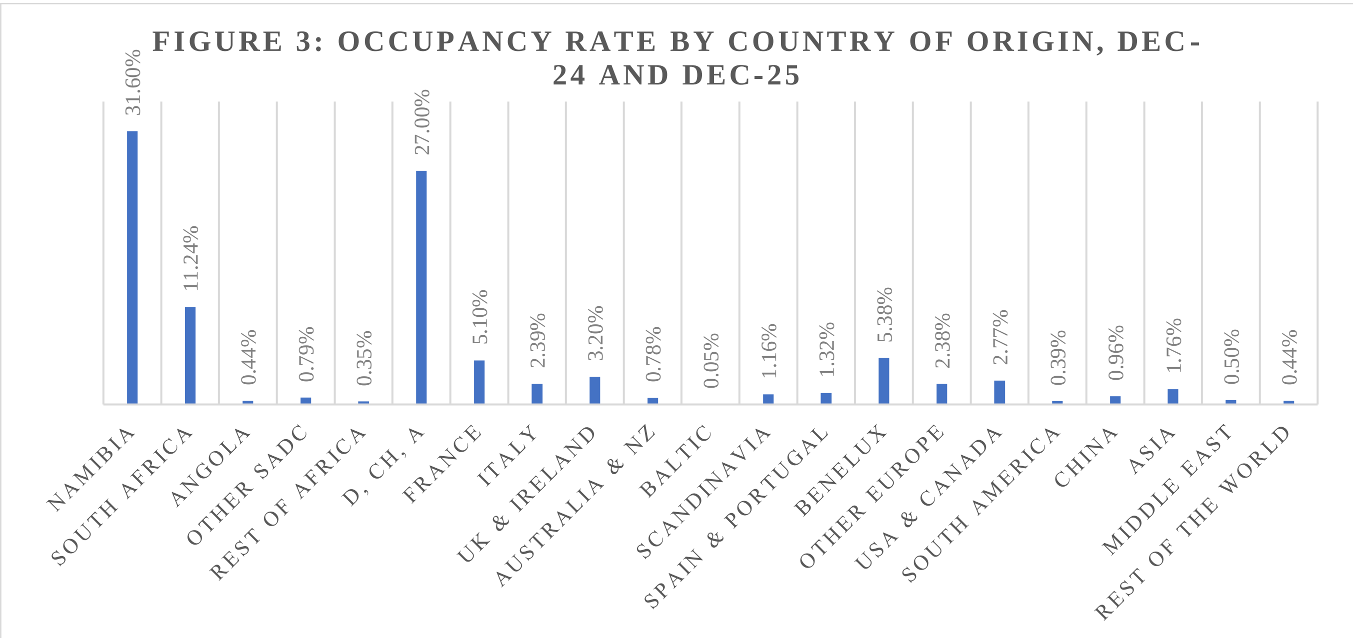
Source: HANS, HEI Research



Source: HANS, HEI Research

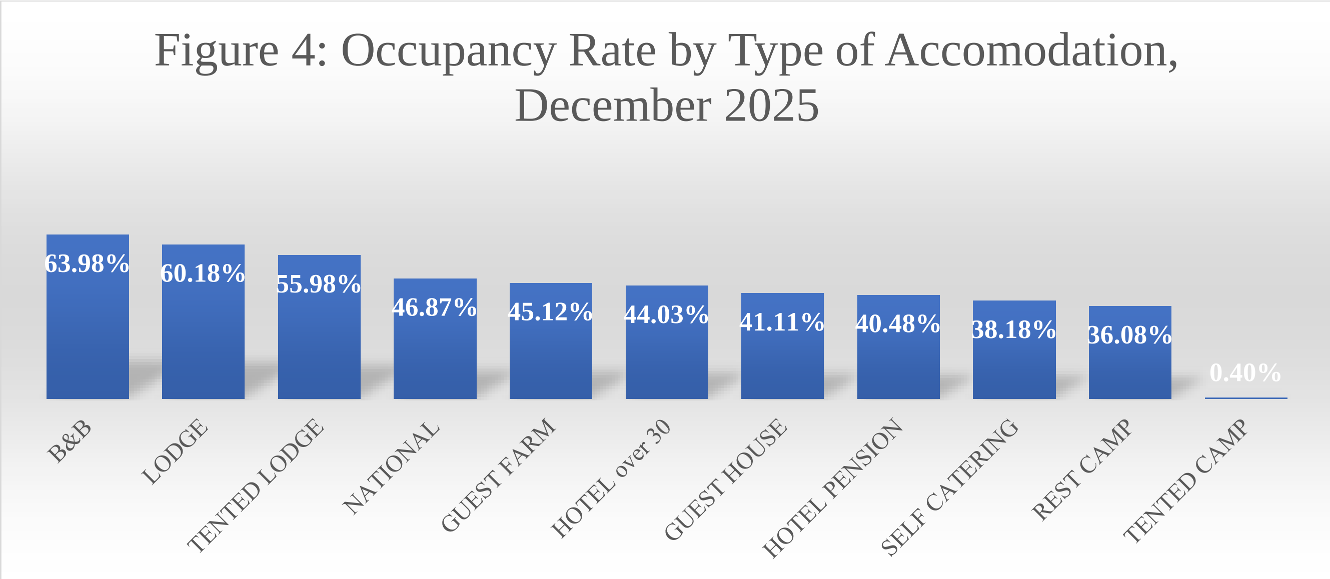
The Coastal region led occupancy at 53.23%, significantly outperforming the national average of 40.48%. The Northern and Southern regions both hovered around 40% occupancy, close to the national average of 40.48%, while the Coastal region led significantly at 53.23%. The Central region trailed far behind at just 20.59% occupancy. Nationally, a total of 24,440 rooms were sold out of 60,381 available rooms, with the Coastal region filling over half of its available rooms. See figure 2

Leisure travel dominated the market, comprising 97.83% of all rooms sold, This trend was strongest in the Northern region, where nearly every room sold, 99.11%, was booked for leisure purposes. Business travel remained minimal at just 1.64%, concentrated largely in the Coastal region. Conference stays accounted for only 0.53% of occupancy, with a slight uptick in the Central region.



Source: HANS, HEI Research

In December 2025, Namibia's tourism sector exhibited a notable shift toward domestic and regional travellers, with Namibian residents accounting for the largest share of visitors at 31.60%. European markets remained important, with visitors from Germany, Switzerland, and Austria (D, CH, A) contributing 27.00%, underscoring the country's continued reliance on this key segment. South African visitors made up 11.24%, while the Benelux region accounted for 5.38%. Smaller contributions came from France (5.10%), the UK and Ireland (3.20%), and the United States and Canada (2.77%). Other regions, including Italy, Asia, Australia & New Zealand, and South America, each represented less than 3% of total arrivals (see Figure 3).



Source: HANS, HEI Research

In December 2025, Bed and Breakfasts recorded the highest occupancy at 63.98%, followed by Lodges at 60.18% and Tented Lodges at 55.98%. Hotels with over 30 rooms achieved an occupancy rate of 44.03%, while Hotel Pensions reached 40.48%. Guest Houses and Guest Farms recorded moderate occupancy rates of 41.11% and 45.12%, respectively. Self-Catering units reported a rate of 38.18%, whereas Tented Camps saw minimal usage at 0.40%. No occupancy rates were recorded for Backpacker accommodations during the period under review (see Figure 4).

3. Outlook/Sentiment

Namibia's tourism sector is expected to experience a period of steady growth in 2026, supported by strong underlying demand but facing structural and cost-related challenges. Domestic travel provides a steady source of demand, helping to smooth seasonal highs and lows and offset changes in international visitor arrivals as reflected in the strong year-end performance. We expect external demand conditions to improve gradually over the course of 2026, particularly in the second half of the year. This is supported by enhanced access from key European markets. A notable upside factor is the commencement of direct Zurich–Windhoek services from mid-2026, which strengthens connectivity with one of Windhoek's most significant European source markets and is likely to support higher inbound volumes, improved booking visibility, and positive spillovers into trade- and investment-related travel. These tailwinds, however, are counterbalanced by near-term headwinds, including weaker forward bookings, constraints related to airlift capacity and visa processes, upward pressure on travel costs following substantial increases in national park fees, and persistent regional and segmental disparities, particularly subdued business travel. On balance, while growth momentum may remain subdued in early 2026, sustained capacity utilisation, improved international connectivity, and the gradual expansion of event-based tourism—including sports tourism, particularly ahead of the 2027 Cricket World Cup co-hosting thispoint to a stabilising trajectory, with the sector continuing to support GDP, job creation, and foreign exchange earnings.