

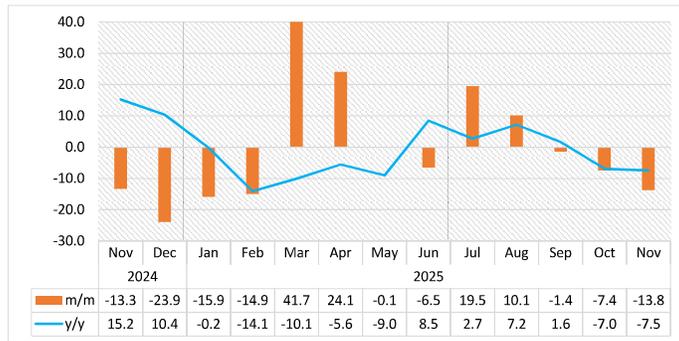


SECTORAL REPORT

ROOMS & BEDS OCCUPANCY NOVEMBER 2025



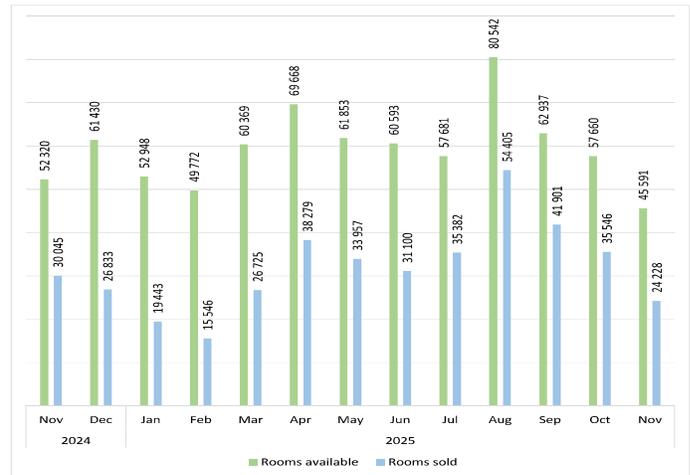
Chart 1: Rooms Occupancy Rate Index, Percentage Change¹



- The **Rooms Occupancy Rate Index** fell by 13.8 percent month-on-month in November 2025, extending the 7.4 percent decline recorded in October 2025. Year-on-year, the index also decreased by 7.5 percent (Chart 1).
- The month-on-month decline was mainly driven by lower occupancy levels in hospitality establishments across the coastal, northern and southern regions, while the central region recorded an increase.
- Regionally, the coastal area posted the significant drop with 21.1 percent, followed by the northern region (-15.4 percent) and the southern region (-13.9 percent). In contrast, the central region recorded a notable increase of 23.4 percent during the review period.

¹ This chart is limited to 40 percent for better readability.

Chart 2: Number of Rooms Available and Sold



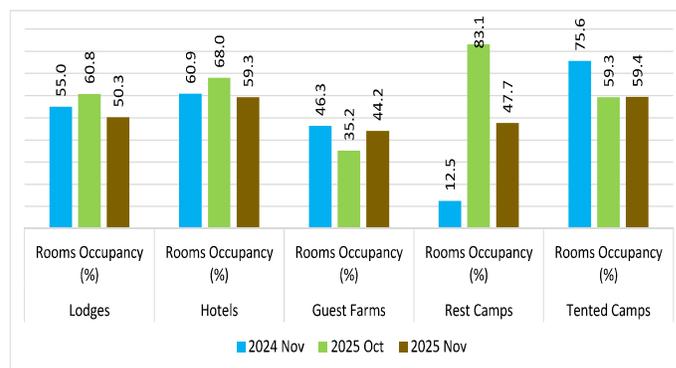
- During the review period, a total of 45 591 rooms were available nationwide, with 24 228 occupied, yielding an occupancy rate of 53.1 percent. In comparison, October 2025 recorded 57 660 available rooms and 35 546 rooms sold, resulting in a higher occupancy rate of 61.6 percent (Chart 2).

Chart 3: Number of Rooms Available and Sold by Region



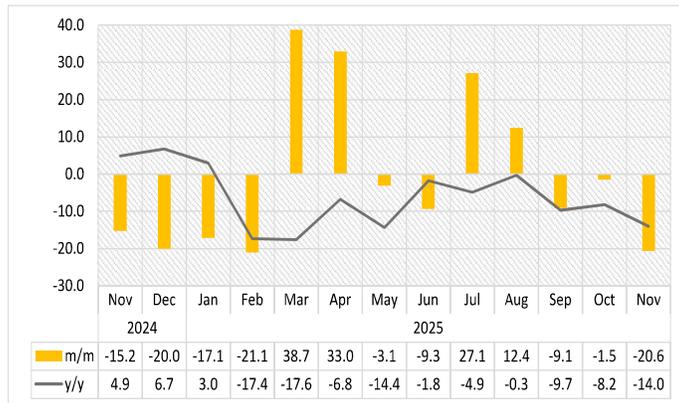
- In November 2025, the northern region recorded 20 385 available rooms, down from 26 691 in October 2025 and 21 120 available rooms in November 2024 (Chart 3).
- During the review period, 11 011 rooms were sold in the northern region, compared with 17 039 rooms in October 2025 and 11 599 rooms sold in November 2024.
- In the southern region, a total of 18 716 rooms were available, of which 9 373 were sold, leaving 9 343 rooms unsold during the month.

Chart 4: Rooms Occupancy by Type of Hospitality Establishments



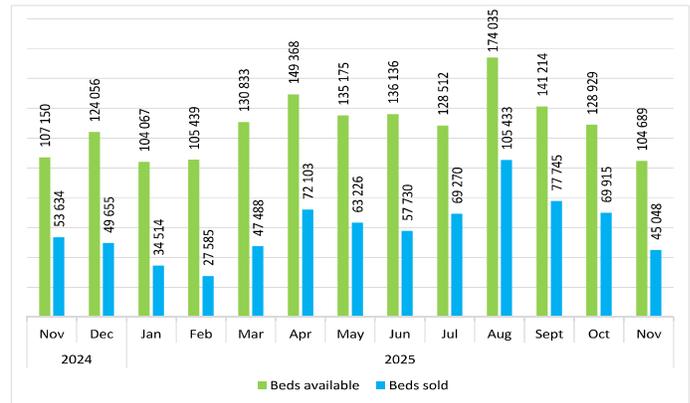
- In November 2025, room occupancy rates slowed down across most accommodation types compared with the previous month, except for guest farms and tented camps, which recorded increases (Chart 4).
- Guest farms recorded an improvement, edging up to 44.2 percent from 35.2 percent in October 2025, while tented camps rose to 59.4 percent, up from 59.3 percent posted a month earlier.
- Lodges and hotels, by contrast, experienced slowdowns in November 2025, with occupancy rates falling to 50.3 and 59.3 percent, respectively, down from 60.8 and 68.0 percent recorded in October 2025.
- Rest camps also registered a slowdown, as occupancy rates dropped to 47.7 percent in November 2025, down from 83.1 percent in the previous month.

Chart 5: Beds Occupancy Index, Percentage Change



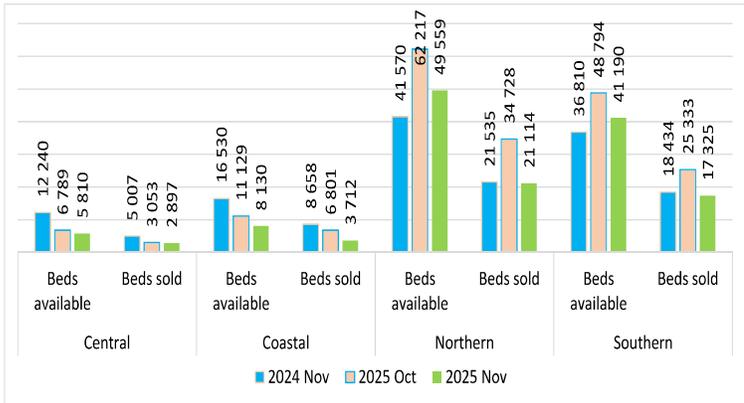
- The **Bed Occupancy Rate Index** contracted by 20.6 percent month-on-month in November 2025, a sharper decline than 1.5-percent decrease recorded in October 2025. Year-on-year, the index also dropped by 14.0 percent (Chart 5).
- The month-on-month decline was largely driven by lower bed occupancy across most accommodation categories, apart from tented camps and guest farms, which recorded improvements during the review period.
- During the review period, the coastal region recorded the significant month-on-month decline of 25.3 percent, followed by the northern and southern regions, which fell by 23.7 and 19.0 percent, respectively. In contrast, the central region registered a 10.9 percent increase in November 2025.

Chart 6: Number of Beds Available and Sold



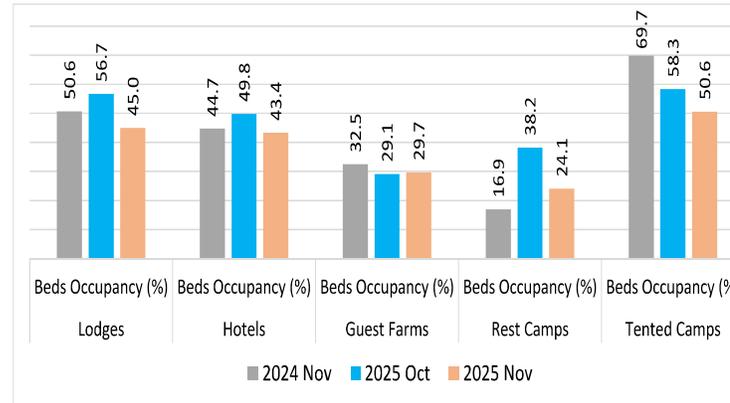
- In November 2025, a total of 45 048 beds were sold out of 104 689 available nationwide, down from 69 915 beds sold out of 128 929 available in October 2025 (Chart 6).
- This comparison reflects a decline in both bed availability and bed sales between October and November 2025.

Chart 7: Number of Beds Available and Sold by Region



- In November 2025, hospitality establishments in the northern region reported 49 559 available beds, down from 62 217 in October 2025, but higher than the 41 570 recorded in November 2024.
- The southern region recorded 41 190 available beds, a decline from 48 794 in October 2025, yet still above the 36 810 beds reported in November 2024.
- In the coastal region, available beds fell to 8 130 in November 2025, down from 11 129 in October 2025. Similarly, the central region reported 5 810 available beds, compared to 6 789 in the previous month (Chart 7).

Chart 8: Beds Occupancy by Type of Hospitality Establishments



- During the review period, bed occupancy rates dropped across most hospitality categories relative to October 2025, except for guest farms which recorded an increase (Chart 8).
- In November 2025, tented camps recorded the highest bed occupancy rate of 50.6 percent, followed by lodges with 45.0 percent. Hotels ranked third with 43.4 percent, while guest farms and rest camps recorded the lowest rates, with 29.7 and 24.1 percent, respectively.

Table 1: The Indices of Rooms and Beds Occupancy

Year	Month	Index for Room Occupancy rates	Index for Bed Occupancy rates
2021	Jan	37.0	42.8
	Feb	35.3	36.1
	Mar	36.7	41.2
	Apr	50.6	55.7
	May	45.8	54.1
	Jun	30.6	32.5
	Jul	21.7	26.1
	Aug	37.7	44.4
	Sep	50.1	55.7
	Oct	61.8	72.5
	Nov	64.2	71.0
	Dec	50.8	64.0
2022	Jan	35.2	41.9
	Feb	48.1	48.3
	Mar	51.1	56.3
	Apr	66.7	80.7
	May	71.9	84.8
	Jun	58.7	67.2
	Jul	95.9	116.7
	Aug	111.9	135.2
	Sep	96.6	117.9
	Oct	62.0	73.1
	Nov	83.7	96.1
	Dec	69.3	86.2
2023	Jan	67.7	78.8
	Feb	57.8	65.1
	Mar	74.3	85.1
	Apr	94.7	120.1
	May	92.8	108.6
	Jun	93.5	103.7
	Jul	111.4	134.5
	Aug	125.8	154.6
	Sep	119.6	141.8
	Oct	119.7	146.0
	Nov	91.0	114.5
	Dec	72.3	90.0

Table 1: The Indices of Rooms and Beds Occupancy Continue...

Year	Month	Index for Room Occupancy rates	Index for Bed Occupancy rates
2024	Jan	67.2	77.3
	Feb	66.4	76.0
	Mar	89.9	105.7
	Apr	106.3	124.3
	May	110.2	131.0
	Jun	86.4	103.6
	Jul	109.1	136.0
	Aug	115.1	145.8
	Sep	119.6	146.3
	Oct	121.0	141.7
	Nov	104.9	120.1
	Dec	79.8	96.0
2025	Jan	67.1	79.6
	Feb	57.0	62.8
	Mar	80.8	87.1
	Apr	100.3	115.8
	May	100.3	112.2
	Jun	93.7	101.8
	Jul	112.0	129.3
	Aug	123.4	145.4
	Sep	121.6	132.1
	Oct	112.6	130.1
	Nov	97.0	103.3

Methodology

Background:	The room and bed occupancy indices serve as a proxy for the tourism sector, a priority sector under NDP5.
Data sources:	Hospitality Association of Namibia.
Central regions:	Khomas, Omaheke, Otjozondjupa.
Coastal region:	Erongo.
Northern regions:	Ohangwena, Omusati, Oshana, Oshikoto, Kunene, Kavango East, Kavango West and Zambezi.
Southern regions:	//Kharas and Hardap.
Base year:	The volumes have been referenced to 2015 data as of November 2019.
Conversion:	1 basis point = 0.01 percent.