



LIVING WITHOUT WALLS

# ASIA – PACIFIC GLAMPING MARKET SUSTAINABLE LUXURY LODGING SOLUTIONS

Perspective on growth, trends, challenges, and solutions in  
luxury sustainable glamping across the Asia-Pacific region



**Presented by Escape Nomade, world pioneer in Luxury Tented Concepts**  
August 31, 2025

MARKET OVERVIEW & KEY STATISTICS

ASIA-PACIFIC GLAMPING MARKET GROWTH



|                                   |                                         |
|-----------------------------------|-----------------------------------------|
| Market Size (2024)<br>\$620.5M    | Growth Rate<br>10.8% CAGR through 2030  |
| Interest Growth<br>36% since 2017 | Properties<br>29 international standard |

Key Regional Markets

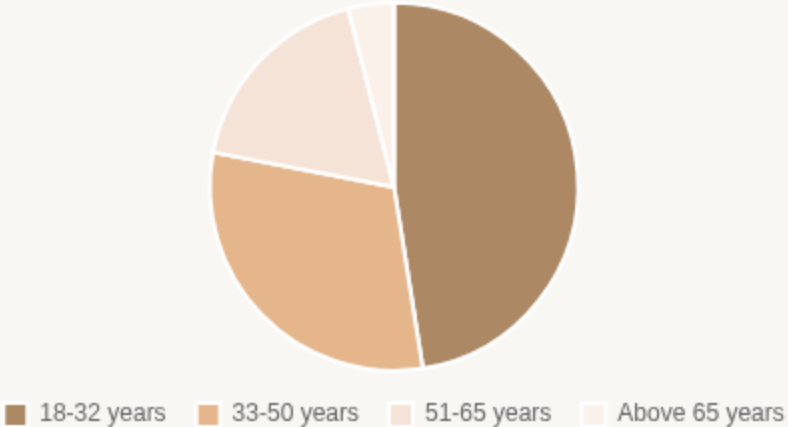
- Thailand
- Indonesia
- Australia
- India
- Hong Kong

Indonesia and Thailand are prime glamping markets with 14 standalone tents-only resorts and 15 hybrid operations across the region.

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Demographics

Age Distribution of Glamping Market



Key Consumer Insights

- **Young adults (18-32)** represent nearly half the market at 47.49%
- **Family-friendly** options gaining popularity
- **Wellness integration** increasingly demanded
- **Nature immersion** primary driver of consumer interest

Source: Grand View Research, APOLA, 2025

# REGIONAL SPOTLIGHT: KEY ASIA-PACIFIC GROWTH MARKETS



## Thailand

- Market Characteristics:
- Strong focus on nature retreats near national parks
  - Premium pricing model (\$300-500/night)
  - Heavy tourism infrastructure support

- Unique Offerings:
- Wellness Integration
  - Culinary Experiences
  - Floating Tents

Growth Opportunity:  
12.5% CAGR (2025-2030)

## Indonesia

- Market Characteristics:
- Island-based luxury experiences
  - Leading in standalone tent-only resorts (8 of 14)
  - Strong conservation partnerships

- Unique Offerings:
- Eco-Education
  - Overwater Bungalows
  - Community Immersion

Growth Opportunity:  
13.2% CAGR (2025-2030)

## Australia

- Market Characteristics:
- Wilderness and outback glamping experiences
  - Advanced sustainable technologies integration
  - High average guest spending (\$450+/night)

- Unique Offerings:
- 100% Solar Operations
  - Stargazing Domes
  - Wildlife Experiences

Growth Opportunity: 9.8%  
CAGR (2025-2030)

## India

Market Focus: Heritage sites, mountain regions, wildlife areas

Opportunity: Emerging market with 15.5% projected CAGR

- Royal-inspired Accommodations
- Desert Luxury Camps

## Hong Kong & Emerging Markets

Key Trend: Urban-adjacent nature escapes

Growth Drivers: Weekend getaways, family experiences

- Urban-proximity
- Family-friendly
- Tech-enabled luxury

Regional Insight: Out of 29 international standard properties in Asia-Pacific, 14 are standalone tents-only resorts with Indonesia and Thailand as prime markets. The most successful properties integrate cultural elements, sustainability practices, and premium comfort features while maintaining connection to the natural environment.

## DEVELOPER TRENDS: DEFINING THE NEW ECO-LUXURY



### Solar-Powered Camps

Renewable energy solutions are becoming standard in modern glamping development

Adoption Rate:



75% of new developments



### Eco-Friendly Materials

Biodegradable, recycled, and sustainably harvested construction materials in high demand

Market Preference:



83% of travelers value sustainability



### Lower Startup Investment

Dramatically reduced development time and costs compared to traditional hotels

Development Time:



50% less time to market



### Family-Friendly Accommodations

Growing demand for larger glamping spaces with child-friendly amenities and activities

- Multi-room tent configurations
- Nature-based educational activities
- Sustainable playground equipment
- Pet-friendly options increasingly popular



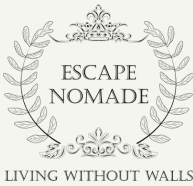
### Wellness Integration

Holistic experiences that combine nature immersion with wellness practices

- Yoga and meditation spaces
- Outdoor spa treatments using natural ingredients
- Hot spring and natural thermal bath access
- Mindfulness trails and forest bathing experiences

*"Developers are rapidly shifting toward more sustainable and wellness-focused glamping designs, with an emphasis on **minimal environmental footprint while maximizing guest connection to nature.**"*

KEY MANUFACTURER CHALLENGES



**Luxury vs. Eco-responsibility**  
Delivering premium guest experiences while minimizing environmental footprint

**Material Durability vs. Eco-friendliness**  
Creating 5–20 year lifespan products using biodegradable or recyclable materials

**Energy Efficiency in Remote Locations**  
Providing consistent power while utilizing renewable sources in off-grid settings



**Waste Management in Natural Settings**  
Creating effective systems for waste reduction, separation, and processing

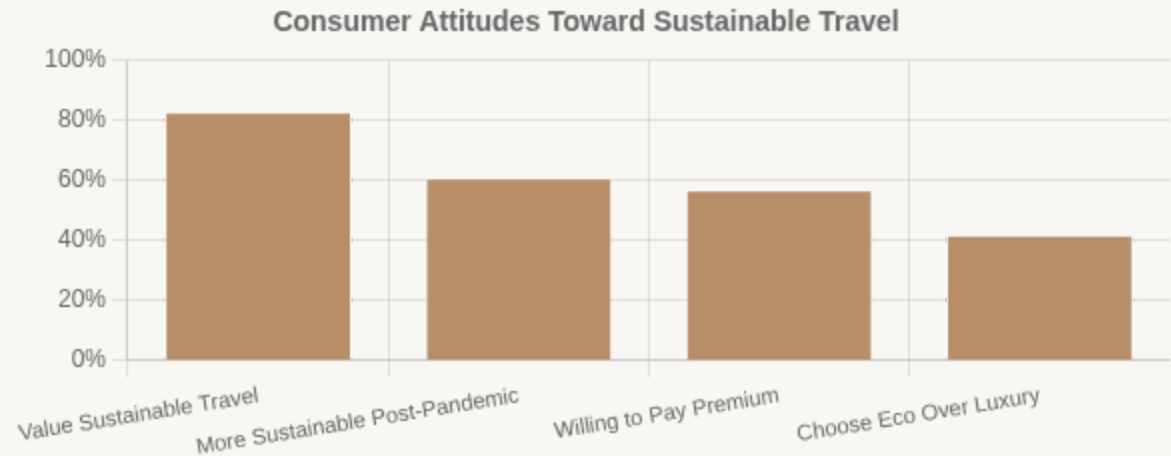
**Water Conservation with Guest Comfort**  
Balancing luxury shower/bath experiences with limited water resources

**Community Integration & Cultural Respect**  
Ensuring designs and operations honor local traditions and benefit communities

"The greatest challenge in luxury glamping isn't just creating sustainable structures, but *maintaining the delicate balance between indulgent experiences and environmental stewardship.*"

# FUTURE OUTLOOK & OPPORTUNITIES

## CONSUMER BEHAVIOR SHIFT



### Technology Innovations

- Smart eco-infrastructure for energy & resource optimization
- Digital experiences enhancing nature connection
- Remote systems for waste & water management

## Market Growth Trajectory

### Emerging Market Trends

- Nature wellness retreats integrating mindfulness practices
- Carbon-neutral glamping meeting climate-conscious demand
- Locally-integrated experiences connecting with cultural heritage
- Work-from-nature accommodations with connectivity

## Growth Opportunities

### Material Innovation

Next-gen biodegradable and recyclable tent materials driving eco-luxury appeal

### Green Infrastructure

Integrated renewable energy and water systems for self-sufficient glamping sites

### Community Tourism

Partnerships with local communities creating authentic cultural experiences

### Eco - Certification

Growing market advantage for operators with recognized sustainability credentials

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Source: Manufacturer survey data, EcoLuxury Tents research 2025  
Made with Genspark

## CONCLUSION: BUILDING THE FUTURE OF RESPONSIBLE GLAMPING



*"Asia-Pacific's glamping future lies in **innovation, collaboration, and authentic sustainability**—combining luxury guest experiences with environmental and community mindfulness."*



### Strategic Partnerships

Join a network of sustainable luxury pioneers across the Asia-Pacific region

[Connect with us & our partners](#)



### Lead Innovation

Develop next-generation sustainable glamping solutions with our design experts

[Explore Innovations with us](#)



### Embrace Sustainability

Implement comprehensive eco-strategies that enhance guest experience and value

[Sustainability Roadmap](#)

Let's Shape the Future Together

World pioneer in Luxury Tented Concepts for resorts, wellness, F&B, and more.  
More than 350+ projects in 55+ countries of all climates.



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