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## Hidden in Plain Sight: Reexploring Glamping Potentials

Tourism is a dynamic industry that requires the ability to adapt constantly to customers' changing needs and desires. The world is evolving, things are changing, and tourism sector is no exception. One trend spotted to continuously taking a wave on the growth of tourism is 'camping holiday', which also recently popular as 'glamping'.

The COVID-19 outbreak in this early 2020 has given an unprecedented challenge to tourism industry across the globe. It is inevitable that all tourism players must adapt and find solutions to rebound and thus accelerate post the pandemic. On the other side, tourism destination operators have been opening their eyes and trying to analyze the yet-unfolded opportunities lying behind the glamping business. The fact that glamping can also be integrated with nature and local culture shows its potential to be developed in Indonesia with its natural and cultural richness.

## Editorial

The COVID-19 outbreak has taken its heavy toll on the tourism sector globally, impacting a rapid sharp drop in international tourism demand. The extent and intensity of the current pandemic will likely have a longer lasting effect on international tourism compared to the rest of industries. Recovery will likely occur once major restrictions policies will be lifted.

Indonesia is no exception. In Indonesia, tourism sector is considered one of the hardest hits by the COVID-19 outbreak. Despite the hit, it is a general opinion that China, Asia, Southeast Asia including Indonesia are among countries to have the fastest recovery. It is generally expected that a boom in tourist visitation, in majority the domestic tourists, will occur once the social distancing policies are over.

Tourism sector should adapt and anticipate to serve the expected surge of tourists demand, in the effort to turnaround the hit impacts to a recovery. One of the challenge is to prepare tourist accommodation facilities due to the very short period of expected surge of demand and also due to limitation of spendable capitals post COVID-19 crisis.

Noticed, one trend – during the past growth of tourism – that seems to constantly creating a new wave in the growth of tourism is the camping vacation.

Camping has developed from a basic outdoor activity into a form of curated activity where camping activity is combined with a more luxury amenities; from a mere of tent to a fancy room equipped with cozy bed, furnitures, beautiful landscape, and varies of activities. Camping vacation has added to itself the *glamping vacation*.

Before the COVID-19 crisis, several tourism destination operators have been opening their eyes and try to analyze

the yet-unfolded opportunity lying behind this glamping business. For operators, it offers a new option to attract travellers with a relatively lower cost and shorter construction period. For travelers, glamping means another attractive option of vacation and accommodation in the destination they visit. The fact that glamping can also be integrated with nature and local culture also shows its potential to be developed in Indonesia, which happens to be a vast country with natural and cultural richness.

Who knows, glamping might be one of possible tools to recover the tourism sector, especially in Indonesia.

This trend analysis or review is for everyone whose interest in tourism sectors, particularly the glamping market. We hope that the insights therein can contribute to the recovery of growth of Indonesia tourism sector.

Inline with the WTO campaign, let's make sure we are ready to **#TravelTomorrow!**



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# INDONESIA GLAMPING MARKET

## Re-exploring the unseen potential of sustainable tourism



### Global Tourism

International tourist arrivals grew 5% in 2018 to reach the 1.4 billion mark, driven by a relatively strong global economy, a growing middle class in emerging economies, technological advances, affordable travel costs and also visa facilitation. (UNWTO 2019)



### Tourism Receipts

Simultaneously, total international tourism exports (international tourism receipts + passenger transport) have grown by 4% to USD 1.7 trillion. (UNWTO 2019)



### Glamping Market

The Global Glamping Market was valued at USD 2.07 Billion in 2018 and is projected to reach USD 4.60 Billion by 2026, growing at a CAGR of 10.71% from 2019 to 2026. (Verified Market Research 2019)



### Outlook

The Indonesian tourism industry is set to continue growing for the foreseeable future. Along with this, camping 'with an experience' is expected to become increasingly popular and post a positive trend in short to medium term.

When asked about camping, many people relate it to tents and campfires. Camping is found to be a form of outdoor activity which more and more people come to a liking. For many, camping is one of the best outdoor activity, on contrary, for some others camping is perceived as an unpleasant experiences, because of insects, wild animals, the comfortless of staying without proper amenities, or else. In respond to this, some tourism business players try to find the solution to make people get the experience of camping back to nature without really feeling the discomfort of the so called unpleasant experiences, which is now known as *glamping*.

Glamping, which word comes from the word *glamour* and *camping*, is becoming a new trend in the outdoor tourism that combines luxury and nature, comfort, and respect for the environment, as well as providing exclusivity and uniqueness in offering 'out of the box' accommodations.

Glamping or, glamorous camping, is defined as a type of camping that is more comfortable and more luxurious than traditional camping. Glamping is basically both a camping activity and accommodation at the same time, staying close to nature, but with comfort and 'luxurious' facilities that camping might not provide, such as nice tent or cabin, proper bed and furnitures, air conditioning, clean bathrooms, Wi-Fi, fancy amenities, etc. It is an experiential travel and an authentic way to connect with nature. Gradually, glamping is welcomed by more people and plays an important role in the fast-growing nature-based tourism industry because of its characteristics that make it possible to enjoy nature without sacrificing comfort.

Glamping is an increasingly popular mode of tourism accommodation started from the North America and Europe to other parts of the world in the past two decades. Glamping was started as a special product that targets the middle-up class who want to enjoy the experience in the wild.

The glamping pioneers at the end of the 19<sup>th</sup> century were luxurious members of the upper classes of British society, led by Thomas Hiram Holding, a cyclist who loved to write and wrote a book in 1898 called 'Cycling and Camping in Connemara' (in Ireland). He described the portable camping equipment he designed and invited fans of outdoor activities to contact him. This led to the formation of the Camping and Caravanning Club in 1901, which today has more than 300,000 members.

The development of mass camping over the past 50 years, is often seen as the development of cheap and simple mass accommodations, which has experienced the initial idea of camping as staying overnight in nature with appropriate activities.

In the new era, camping has returned to the values of living in extraordinary natural environments, plus with the comfort of new luxury accommodations, that in the development have become more imaginative and unusual.

Camping, which developed into glamping, now become more popular as an alternative of vacation.

## Global Market size

According to Verified Market Research, the Global Glamping Market was valued at USD 2.07 Billion in 2018 and is projected to reach USD 4.60 Billion by 2026, growing at a CAGR of 10.71% from 2019 to 2026.

Figure1



Source: Verified Market Research

The global glamping market was dominated by Europe in 2018, followed by the United States and Central & South America. Europe accounted for 32.2% of the global market in 2018. The United States was the fastest-growing market followed by Europe and Southeast Asia.

Staying in camping accommodation rather than using camping equipment yourself is becoming more prevalent. A 26% increase in income from camping accommodation was registered in the US in the previous year (Haak, 2011). According to KOA, three people in ten stated that they had camped in a full-service cabin (28%) or in a rural cabin (3%). These results indicate that there may be a change in the way camping is introduced to camping (KOA, 2016).

The North American Camping Report has discovered since 2014 the interest in this type of vacation has dramatically increased. It is rising in popularity because of its affordability, the range of activities available, as well as it being the perfect opportunity for families to spend quality time together. It allows those who love the wilderness and want to enjoy the fresh air a chance to escape to nature whilst being close to home if they wish.

In 2018, families choosing to camp grew by 1.4 million, reaching an overall all-time high of 78.8 million households. Camping statistics show people are expressing an interest in all forms, from luxury glamping to the standard tent. Ultimately, it caters to everyone as people are finding exciting and alternative ways to camp that suits their needs.

Aside from those figures, KOA (Kampgrounds of America) statistic shows that millennials have amplified the popularity in camping industry as they represent the bulk of new campers in 2018 making up 56% of the new campers in 2018. Interest in camping is still strong among the other generational groups, however, with 44% of new campers being 40 years old or older, and a full one-fourth of new campers being part of Gen X.

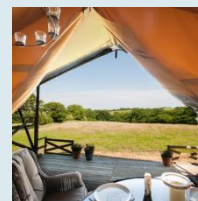
## Glamping in the global market



The term 'glamping' actually appeared in 2007, with the glamping tourism context really popular in 2010. In 2013 glamping became increasingly established and became more popular in various parts of the world, ranging from simple to luxurious forms.



This camping activity became more and more popular in small groups of rich people until almost a hundred years later its popularity skyrocketed to the holiday we know today.



In the 1900s camping activities and accommodation began to develop when rich European and American people wanted to feel the luxury of their camping adventure to Africa. They will live in safari tents, often equipped with antique furniture, double beds, Persian rugs and luxury beds. The visitors do not want to leave the luxury of their home on their journey, however, want to enjoy the spectacular scenery available in nature so take their luxury to accompany them. They move from one place to another.



Glamping has actually been rooting in the development of tent-shaped dwellings which began in the 1100s, where Mongolian tribes lived in yurts or gurs under Genghis Khan's rule. They use tents to protect from strong winds and are large and stable semi-permanent houses as they move from one place to another.

Source: TASK, from many sources

## Glamping in Indonesia

In 2019, along with the Government policy to boost tourism, glamping development became one of the key tools of the national tourism strategy, where glamping began to be built in several priority tourism areas such as Borobudur and Lake Toba, to help trigger the tourism growth in these areas.



Since 2015, more glamping types are flourishing in various regions in Indonesia, generally by providing added-value so that glamping is not only a means of accommodation but also an experience. The glamping class is also increasingly diverse, not only for the upper class, but also capturing the middle market segments.



In 2015, a large hotel operator company began to enter the glamping industry, Marriott International opened its first glamping resort in Indonesia: Natra Bintan Resort on Bintan Island.



Between 2010-2015, glamping accommodation targeting upper and luxury tourists began to be developed, especially in exotic tourist areas such as Bali and Lombok, generally developed by individual investors, both local and foreign investors. They are targeting glamping for the upper class with spending high enough to get luxury amenities and an exotic atmosphere. Examples: Sandat Glamping Tents in Bali and Jeeva Beloam in Lombok.



In 2010 along with the growing trends of glamping in the world and especially Asia, the concept of glamping tent accommodation equipped with comfortable facilities began to develop, one of which was at the Highland Park Resort in the Bogor area. Tents here are equipped with a bed, sofa, TV, bathroom, air conditioning, and refrigerator. In addition, Highland Park Resort Bogor also provides various additional facilities for children and families, such as water park, outbound area, mini golf, and others.



Before 2010, glamping actually have existed in Indonesia, but generally more referred to as a cottage or a hut, not a tent. This type of accommodation is widely developed in areas that have a natural character and local culture such as Bali and Lombok, developed by local people with facilities that are still very simple. The concept is simple: minimal development costs while providing adequate accommodation facilities for tourists.



Indonesia has been enjoying a positive growth of tourism in the past decade, thanks to the solid economy. However, domestic market remained the backbone of Indonesia tourism while foreign tourists are mainly concentrated in Bali as the most popular tourist destination in Indonesia.

In Indonesia, camping activity has been growing organically. However, camping in Indonesia is not as popular as those in other countries such as Europe and America. Camping mostly done by specific group of people who have passion in hiking and exploring nature, especially in mountainous area. It is considered as a form of outdoor activity, and is not specifically fall into tourism term; at least until the word of *glamping* emerged.

In the past decade however, glamping has developed significantly in Indonesia. More people are travelling than before, and some are seeking for more than just 'travel'. They look for experience, being close to nature, authenticity.

Taking a look at the growing industry, it is seen that tourism demand in recent years is highly correlated to the population. Young travelers are seen to dominate the market. Millennials, which includes adults between the ages of 20 and 38 (in 2018), have quickly become one of the most powerful forces in the glamping industry. They have money and they want to spend it on experiential travels to new and exotic destinations. They are highly connected to social media, they share a lot, and these somehow help the industry enjoying a solid growth.

### Why Glamping?

- **MARKET FLEXIBILITY.** Means of accommodation that are able to capture various market segments, ranging from adequate to luxury.
- **LOCATION FLEXIBILITY.** Easier to develop in a variety of land characters, be it flat land, mountains, coastal areas, or others.
- **RELATIVELY LOWER COST.** The development costs are relatively lower compared to hotels or other forms of multi-story buildings.
- **SHORTER DEVELOPMENT PERIOD.** The development time (construction) is relatively faster compared to multi-story hotel buildings.

## Glamping Types

There are many types of glamping, generally categorized by its structure. Here are some of the glamping types popularly used.

Type	Sub Type
Treehouses	Tree Houses
Yurts	Yurts
Tents	Safari Tents, Bell Tents, Luxury Tents
Tipi/Tepee	Tipis
Domes	Bubbles, Domes
Cubes and Pods	Pods
Lodges	Nature Lodges
Unique & Unusual	Igloos, Caves, Boats, Floating Homes, Hobbit Houses
Barns & Farmhouses	Barns
Huts & Cottages	Huts, Cottages, Tiny Houses
Cabins	Cabins, A-frame Cabins, Tented Cabins, Log Cabins
Wagons & Shepherds Huts	Cabooses, Caravans, Containers
Villas	Villas, Beach Houses, Vacation Rentals
Tours & Excursions	Private islands
Luxury Lodges	Castles and Towers
Airstreams & Trailers	Airstreams



Treehouse



Domes



A-frame Cabins



Yurts



Pods



Tented Cabins



Tents



Lodges



Log Cabins



Tipi/Tepee



Huts & Cottages



Caravans

## Glamping in Indonesia in Figures

The number of glamping accommodations in Indonesia currently continues to show growth and positive trends. By end of 2019, we identified 36 accommodations that can be classified into glamping in Indonesia. In the last five years (2014-2019) an average of 4 glampings have been built per year, with varying grades and types.

By location, glamping accommodations are generally scattered in the regions of Java, Sumatra, Bali and Nusa Tenggara with the highest number in West Java with 13 glamping, and Bali with 11 glamping. West Java contributes to the supply of glamping as much as 36% of the total supply, while Bali contributes 31% of the total supply. The domestic tourists are concentrated to the glamping projects in West Java area, while glampings that are popular to foreign tourists are projects located mostly in Bali, Bintan and Nusa Tenggara.

The number of glamping developments in mountainous areas (land, can be in the form of hilly areas or close to rice fields) dominates the existing supply, around 72% of the total supply, while glamping in the beach area accounts for approximately 28%.

Glamping is one unique type of accommodation. Every glamping is different; has its own characteristic and personalities. We can not define the grade simply by its rate per night stay, because it involves many criteria, including the services and activities they offer. Looking at every aspects that each glamping project has, we categorized glamping into four grades: lower-middle, upper-middle, upper, and luxury.

By grades, glamping accommodation in Indonesia dominated by middle-up class glamping, around 42% of total supply, followed by middle-low at 31% of total supply. By rate per night, this middle-up grade glamping can be translated into those offering publish rate between Rp1 million to Rp3 million per night.

Based on the type of tent, glamping in Indonesia generally uses a tent structure, as much as 53% of the total supply, followed by a cabin structure of 17%. The rest are hut and cottages, domes, tipi and yurts. More on the sub-type of tent, glamping in Indonesia generally uses safari tents, as much as 31% of the total supply, followed by tented cabins (17%) and bell tents (14%).

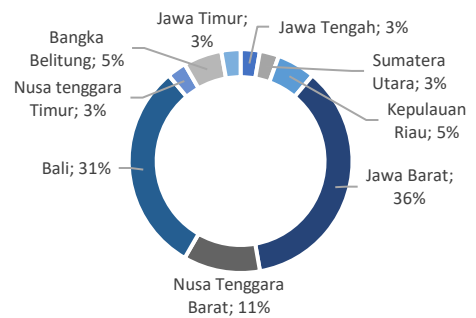
Figure 2



Source: TASK

Figure 3

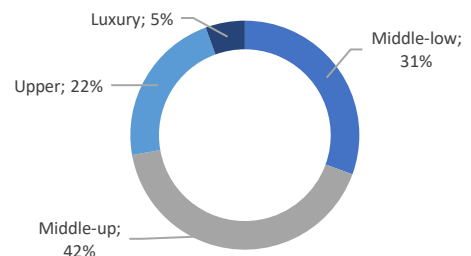
Glamping Supply in Indonesia Based on Province



Source: TASK

Figure 4

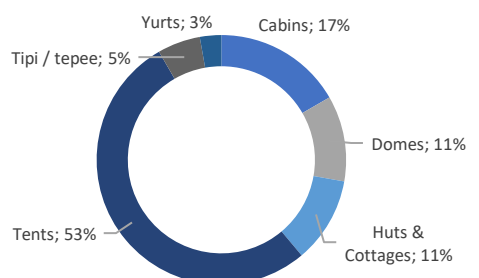
Glamping Supply in Indonesia Based on Grade



Source: TASK

Figure 5

Glamping Supply in Indonesia Based on Tent Type



Source: TASK

## Factors That Help Boost Glamping in Indonesia

The development of glamping is inseparable from the growth of the tourism sector, not only in the national scope, but also the world.

There are three factors believed to be the main drivers for Indonesia's tourism growth:



### The strengthening middle class

Strengthening the middle to upper class community as a result of a healthy national economic growth continues to encourage the growth of the tourism sector with more and more people who travel.



### Infrastructure development

The realization of infrastructure development, whether by land, sea and air, which continues to be pursued continuously by the Government, has contributed to the growth of the tourism sector in terms of accessibility, especially for areas that were initially more difficult to reach.



### Digital technologies are shaping traveller's experience

Digital technologies and artificial intelligence has transformed tourism, from virtual assistants to companies that are able to offer a variety of tourist experiences to customers who are very personal and also able to improve the business performance of industry players.

Based on SES AC Nielsen's data, it can be seen that the middle and upper segments in several major cities in Indonesia have been increasing in terms of composition (%). The increase in household expenditure is predicted to have a strong correlation with the composition of the larger family expenditure allocated for recreation.

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Digital technologies have changed tourism, from virtual assistants to companies that are able to offer a variety of travel experiences to customers who are very personal and also able to improve the business performance of industry players.

Apart from the three main drivers, we have also watched on several factors and diverse trends that help supports the growth of glamping related to global consumer travel trends:

■ **Travel to experience, seek for authenticity.** *Having unique experiences: not the 'highlights' but the experience and the trip itself.*

More and more people are travelling or going on tours to look for new things, unique new experiences, and to feel the experience of staying like residents in the area they are visiting. This means that the uniqueness of an area (authenticity) is something that needs to be explored to be a tourist attraction.

■ **The growth of family-friendly tourism.** *Quality time with family is the biggest driver for family travel.*

The 'Family Travel Trends 2018' Agoda survey conducted by YouGov showed that with today's general trend with longer working hours and various distractions from modern life that make it difficult for families to spend time with each other every day, it's no wonder that tourists globally have the goal of enjoying quality family time (68%) while doing family travel. Relaxation (66%) and trying new things (46%) are the second and third preference.

■ **Travel 'to show'.** *'Instagramable' moments, experiences and destinations.*

With the increasingly aggressive development of social media, more and more people are traveling to express and show their travel experiences to others, both for the purpose of associating with the world and the community, but as a means to express themselves. Indonesia is ranked 4th with the largest number of Instagram users in the world after the USA, Brazil and India (Statista 2019). This trend is something that needs to be understood and utilized especially by the tourism industry to be able to continue to grow along with the times.

■ **The rise of millennials.** *Shaping the new lifestyle.*

Millennial generation in the age group of 20 to 38 (in 2018), is one of the fastest growing consumer segments globally and nationally and is one of the drivers of the emergence of new trends in various sectors, including the tourism sector. This generation currently has a large portion of the population pyramid in Indonesia and most of them are in the productive age group, including quite consumptive, including to travel.



In the millennial community and Y genes that are in the bracket of productive age population, there are also segments of young parents with children under 12 years who are active in traveling with the aim of providing exposure and positive experiences for child development. In the more affluent circles, this segment of the community has a large potential to become a target market with a sizable income and purchasing power, not only for accommodation, but also for other activities. The implication is, tourism industry players who are able to accommodate the tourism needs of these children will be able to take advantage of both in terms of exposure and tourism receipt.

■ **Rise of the 'access' economy. Sharing economy.** The trend of 'access' economy also has a significant impact on the world tourism industry with more accommodations applying the concept of sharing economy such as the

emergence of vacation accommodation rentals, ride sharing services, etc., which supported by the development of technology-based service providers. This causes the scope of accommodation facilities to be no longer limited to traditional hotels, resorts, etc., but is increasingly diverse and gives greater flexibility to tourists in traveling.

■ **Rising awareness on sustainability. Zero plastic and climate change.**

Today the world's population awareness of the environment is increasingly high. The issue of sustainability has become a part of daily life and is also applied in travel activities. More managers of tourist areas are care to develop sustainable tourist destinations, and more and more tourists who are aware also care to preserve the environment and the tourist places they visit.

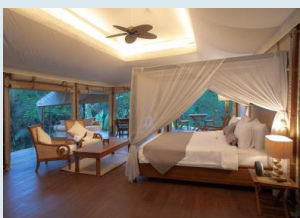
## Select Glamping Projects



Glamping: **Natra Bintan, A Tribute Portfolio Resort**  
 Location: **Desa Seborg Lagoi, Kec. Teluk Seborg, Kab. Bintan, Kep. Riau**  
 Area: **Kawasan Pantai – Teluk Lagoi, Pulau Bintan**  
 Segment: **Upper**  
 Year of Opening: **2015 (d/h The Canopi, 2019 Rebranding ⇒ Natra Bintan)**  
 Operator: **Mariot Bonvoy, Mariot International – International Operator**  
 Development Scale: **1 Cluster – 100 Tents**  
 Type: **Tents**



Glamping: **Jeeva Beloam Beach Camp**  
 Location: **Desa Sekaroh, Kec. Jerowaru, Kab. Lombok Timur, NTB**  
 Area: **Kawasan Pantai – Tanjung Beloam, Tanjung Ringgit, Pantai Pink**  
 Segment: **Upper**  
 Year of Opening : **2012**  
 Operator: **Jeeva Resorts – Indonesia Operator**  
 Development Scale: **1 Cluster – 11 Tents**  
 Type: **Huts & Cottages**



Glamping: **Galalima Glamping**  
 Location: **Desa Meliling, Kec. Kerambitan, Kab. Tabanan, Bali**  
 Area: **Kawasan Gunung – Area Hutan Gunung Salak**  
 Segment: **Upper**  
 Year of Opening: **2019**  
 Operator: **Self-managed**  
 Development Scale: **1 Cluster – 4 Tents**  
 Type: **Tents**

## Key Success Factors When Developing a Glamping Accommodation

Here we list several key success factors that may play an important role in dictating what the future holds from the industry.

The first thing to do is to think about potential customers. Whether it is local visitors, millennials, families, or foreign tourists, this potential customers will define the glamping to be developed.

The next thing to do is to pick the perfect location and choose the structure. Consideration of the choice of tent or building structure is influenced by location, target market character (guest users), projection rate per night, price of tents or building construction costs, and the uniqueness of the structures.

After determining the location and type of tent structures or glamping buildings, what should be planned next is the infrastructure and facilities in the glamping area. Recommended public facilities in the glamping area dining area and kitchen, onsite services (housekeeping), front office / reception area, service area (laundry etc.), communal area / lounge area, children playground, and parking area.

Another essential key for glamping is to add the G-spot (Glamping spot: unique, extra ordinary features). *“When in this business, you just got to have your own G-spot, full stop”*. There’s more to a glamping business service than just the accommodation. Now it is also about the experience. Some G-spots that can be applied in the development of glamping on land sites are natural assets such as hilly landscape, direct view to the seas, unique glamping structure, or deluxe amenities and services.

Then it is also important to create a glamping business checklist. Invest in FFEs: fixtures, fittings, designs, and facilities. Exterior and interior designs are equally important in the development of glamping. Both of these elements must work in synergy and simultaneously, where on the other hand glamping still must have distinct elements that match the character. Samples of amenities that can be added are unique chill-out corner, hammocks suspended between trees, beanbag chairs, bonfire area, outdoor cinema, alfresco dining, grilling or BBQ area, etc.

The last thing to do is to promote.

## The Outlook of Glamping in Indonesia

Indonesia tourism sector is believed to continue growing. While future demand is definitely visible, it is to be noted that the tourism market is definitely a fast-evolving industry greatly influenced by emerging trends. One essential key to grow is to find creative solutions on winning the market.

Glamping is basically one option of accommodation. Combined with attractive attractions or activities, we believe that this trend will continue growing, especially throughout the country that has so many natural richness and tourism assets.

Social media and internet also take an important role in driving consumer awareness about glamping and any new types of travel destinations and accommodation services. Being one of the largest digital audiences in the world, Indonesia has so much potentials to offer for businesses who plan to market their offerings through social media.

After all, for a tourism destination, the location might be powerful, yet in the end a destination with creativity and solid management will win the market. And so, should all parties go hand-in-hand, it is predicted that Indonesia tourism will continue enjoying a positive rise. ■

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Cover page: Campfire (Photo by LUM3N, courtesy of Pixabay)

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**About TASK Cikaldana**

TASK Cikaldana is a consulting services company providing advisory services focusing on tourism destination development and tourism destination business. TASK Cikaldana can help provide tourism related research, conduct market studies, project feasibility studies, develop branding and marketing strategies of destination, as well as build financial strategies on your corporate finances.

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