

Revitalizing Bali: Exploring the Growth of Health and Wellness Tourism

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ABSTRACT: This study aims to explore health and wellness tourism in Bali, Indonesia, as an alternative attraction for tourism. The research employs a desk research method, utilizing online data search techniques and qualitative descriptive analysis. The findings indicate that the health and wellness sector in Bali has experienced significant growth, particularly in the spa and wellness industry, which has increased by over 160% since 2003. Currently, there are approximately 390 spas in Bali, establishing it as a primary destination for wellness tourism. The diversification of health services includes medical tourism, wellness, elderly care, and research/diagnostic services. However, challenges such as a lack of integrated data and intense competition must be addressed through clear regulations and standards to enhance tourist confidence. The rising global trend in wellness tourism aligns with increasing public awareness of mental and physical health. Bali has substantial opportunities to develop health tourism by leveraging its natural resources and local culture. Recommendations include implementing quality regulations by the government, fostering collaboration among service providers, and encouraging active community participation in developing health tourism products. These measures are expected to promote sustainable growth in the health and wellness sector in Bali.

KEYWORDS: Health Tourism, Regulations and Standards, Spa and Wellness, Sustainable Development, Wellness Tourism.

1. INTRODUCTION

Health and wellness tourism has become a rapidly growing global trend. With increasing awareness of the importance of health, many people are seeking travel experiences that are not only enjoyable but also beneficial for their physical and mental well-being. Bali, as one of the world's leading tourist destinations, has significant potential in this sector [1]. Here is a Table 1 showing global health and wellness tourism data based on information from official agencies, particularly the Global Wellness Institute (GWI) and related reports [2].

Table 1. Data of global health and wellness tourism

Year	Number of Wellness Tourism Trips (millions)	Wellness Tourism Expenditure (USD billion)	Market Share in Global Tourism (%)
2012	524.4	439	5.8
2017	-	4,200	-
2019	936.4	720.4	~7.0
2022	~819.4	~919.4	~7.8
Projection 2023-2027	Increasing (14.7% per year)	Increasing (16.6% per year)	Increasing to ~8.3%

Source: [1], [2].

Notes: 2012: The GWI estimated that wellness tourists made approximately 524.4 million trips, with expenditures reaching USD 439 billion [3]. 2019: The number of trips peaked at 936.4 million, and expenditures reached USD 720.4 billion [4]. 2022: After a decline due to the pandemic, the number of trips was estimated at around 819.4 million, with expenditures reaching USD 919.4 billion [5].



Projections for the coming years indicate significant growth in both the number of trips and expenditures, with the market share of wellness tourism expected to increase to 8.3% by 2027 [5]. This data shows that health and wellness tourism has become an ever-evolving global trend, reflecting a growing consumer interest in health and well-being over the past decade [6].

The wellness industry in Bali is becoming important due to several factors contributing to economic growth and tourism appeal. First, the wellness sector in Bali has experienced significant growth, with a growth rate of 6.6%, surpassing the global average economic growth rate. This indicates a substantial potential to enhance the contribution of this sector to the local economy and diversify Bali's tourism offerings. Additionally, there is a rising global awareness of the importance of health and wellness, driving demand for wellness services. The global wellness market is projected to reach \$2.1 trillion by 2023, and Bali offers unique experiences through a combination of local traditions and modern health practices [7].

Government support also plays a crucial role in the development of this industry. Through the Ministry of Tourism and Creative Economy, the Indonesian government actively promotes Bali as a health tourism destination and plans to increase investments in health infrastructure while attracting international medical conferences. The establishment of internationally standard healthcare centers in the Sanur special economic zone aims to enhance healthcare service quality and attract more tourists [8].

Moreover, Bali's rich biodiversity can be leveraged for wellness products, such as herbs and traditional medicine, providing a competitive edge in the global wellness market. The island's rich cultural heritage, including spiritual practices and traditional healing methods, also serves as an additional attraction for tourists seeking authentic experiences. Overall, the wellness industry in Bali not only contributes to economic growth but also strengthens Bali's position as a unique global tourism destination that combines health, relaxation, and culture [9].

In recent years, Bali's wellness industry has begun to emerge as a significant tourist attraction, especially since the government and tourism stakeholders recognized its vast potential. This transformation has been fueled by increasing global awareness of health and well-being, alongside tourists' desire for more holistic experiences during their vacations. In 2020, the Bali government began focusing on developing medical and health tourism as part of efforts to diversify a tourism sector that previously relied heavily on natural and cultural attractions [10].

This initiative has been further bolstered by the opening of special economic zones (SEZ) in Sanur, equipped with internationally standard healthcare facilities and wellness centers designed to meet the diverse needs of tourists. Events such as WTN SUMMIT TIME 2023 also highlight the importance of developing health and wellness tourism in Bali, with hopes of attracting more investments and international medical conferences to the island [10]. With its natural beauty, rich local culture, and quality healthcare services, Bali is increasingly recognized as a global wellness destination. This creates new opportunities for local economic growth while attracting more visitors seeking health and relaxation experiences [11]. This research aims to identify the best strategies for developing Health and Wellness in Bali by examining past conditions, current status, and future possibilities.

2. THEORETICAL FRAMEWORK

2.1 Wellness Tourism

It is a sub-sector within the travel industry that focuses on disease prevention and improving quality of life through health services. The position of wellness tourism within the tourism industry framework is becoming increasingly important, especially in destinations like Bali, known as one of the world's leading spa and health centers [12]. Here are some key points regarding the position of wellness tourism in the tourism industry: Sub-sector of Tourism: Wellness tourism is a sub-sector of the tourism industry that focuses on health and well-being. It includes travel undertaken with the aim of enhancing physical and mental health, as well as seeking relaxation and recovery experiences. In the context of Bali, wellness tourism can be divided into several categories, including medical tourism, spas, elderly care, and diagnostic services [13].

Global Demand: The demand for wellness tourism has significantly increased worldwide. Modern society is increasingly aware of the importance of health and well-being, making health-focused travel a part of their lifestyle. This trend is not limited to foreign tourists but also includes local communities seeking ways to relax and improve their quality of life [14].

Economic Impact: Wellness tourism contributes to local economic growth by creating jobs and increasing regional income. In Bali, for example, the number of spas has increased by more than 160% since 2003, demonstrating the sector's substantial potential to support the local economy [15].

Infrastructure Development: To support the growth of wellness tourism, infrastructure in Bali has also been improved. Modern



health and wellness facilities are being built to meet tourist needs, which in turn benefits local communities [7].

Integration of Local Culture: Wellness tourism in Bali often integrates traditional healing practices with modern services. This not only helps preserve local culture but also provides unique experiences for visitors interested in natural healing methods [16].
Health and Wellness Trends: Global trends indicate that wellness tourism will continue to grow alongside increasing awareness of health issues. Destinations like Bali can capitalize on this trend by offering a variety of products and services that align with market demand [17]. Wellness tourism is not merely an addition to the tourism sector; it has become an integral part that provides economic, social, and cultural benefits to destinations like Bali [18].

2.2. Differences Between Medical Tourism and Health Tourism

Health tourism focuses more on relaxation activities and health maintenance, while medical tourism is more related to medical procedures and disease treatment. Medical tourism and health tourism are two interconnected concepts but have different focuses within the context of healthcare and travel [19].

Medical Tourism refers to individuals traveling abroad to receive high-quality medical care, whether for complex procedures like surgeries or specific treatments. This phenomenon has existed since ancient times, when people travelled to places like Ancient Greece in search of healing. In modern development, medical tourism began to gain widespread attention in the early 2000s, when patients from developing countries started seeking care in countries like India, Thailand, and Singapore, which offered lower costs compared to Western nations [20].

Health Tourism, on the other hand, focuses more on experiences aimed at enhancing physical, mental, and spiritual well-being without significant medical intervention. This includes activities such as spa treatments, yoga, and alternative therapies. In this context, health tourism emphasizes overall health maintenance and relaxation [21]. The chronological development of medical tourism shows that from ancient times to the 20th century, this practice has evolved alongside technological advancements and social changes. In the 1980s and 1990s, rising healthcare costs in developed countries prompted individuals to seek more affordable treatment alternatives in other countries. The Asian economic crisis in the late 1990s also played a role in promoting medical tourism in countries like Thailand and Malaysia. After the events of 9/11, the industry experienced rapid growth as more patients from Western countries sought care in Asia and Latin America [22].

In Indonesia, the government has identified medical tourism as part of a national strategy to increase revenue from the tourism and healthcare sectors. Through various regulations and cooperation between the Ministry of Tourism and the Ministry of Health, efforts are being made to promote domestic medical services to redirect patients who typically seek treatment abroad. Thus, while medical tourism and health tourism have different objectives, both play important roles in enhancing access to healthcare services and overall community well-being [23].

2.3 Trends in Health Tourism

The demand for health and wellness services continues to rise alongside changes in modern lifestyles. The trend of health tourism, or wellness tourism, is increasingly developing worldwide, including in Indonesia. Globally, the health tourism market is projected to more than double between 2022 and 2027, with expenditures expected to reach \$1.4 trillion by 2027 [24]. Indonesia has significant potential to become one of the main destinations in this sector, thanks to its natural and cultural wealth. Destinations such as Bali and Yogyakarta are widely recognized as locations that offer wellness experiences, including yoga, meditation, and traditional treatments. One unique wellness practice in Indonesia which combines yoga, meditation, traditional medicine, and dance to enhance the physical, mental, and spiritual health of tourists [25].

Beyond Indonesia, several countries also show significant developments in health tourism. For example, Thailand has long been known as a wellness destination with various spas and health retreats offering both traditional and modern treatments. India is also famous for its yoga and Ayurveda practices, attracting tourists seeking spiritual and healing experiences. Additionally, Costa Rica leverages its natural beauty to offer eco-tourism-based health programs that combine outdoor activities with a holistic approach to health [26].

However, despite the great opportunities, the development of health tourism in Indonesia faces challenges such as the need to enhance safety and hygiene standards and the necessity for effective promotion through technology and social media. With support from the government and the tourism industry, as well as improvements in infrastructure, Indonesia has the potential to become a leading destination for tourists seeking wellness experiences [26].



The wellness industry in Bali has experienced significant growth, making it one of the top destinations for health tourism globally. Bali is not only known for its natural beauty and culture but also as a hub for wellness tourism that offers a variety of health and wellness services. According to data, Bali received over 5 million international tourist visits in 2023, many of whom were interested in the wellness experiences offered [27].

A concrete example of the development of the wellness industry in Bali is Heavenly Spa at The Westin Resort & Spa Ubud. Research shows that this spa attracts tourists due to its beautiful natural scenery and various wellness activities offered, such as yoga and traditional spa treatments. Easy access from the airport and facilities provided by the hotel also enhances its appeal to visitors. Furthermore, Bali received international recognition as the "World's Best Spa Destination" in 2009, affirming its position as a leader in the global spa industry [28].

Empirical data indicates that the wellness industry in Indonesia, particularly in Bali, contributed approximately USD 6.9 billion in wellness tourist expenditures in 2017 and is expected to continue increasing. Activities such as spa massages, yoga with scenic views, and traditional treatments like lulur (body scrubs) and herbal jamu are major attractions for tourists. Moreover, the trend of wellness tourism continues to grow alongside increasing public awareness of the importance of physical and mental well-being [29].

Nonetheless, challenges remain. The Indonesian Ministry of Tourism and Creative Economy notes the need to improve safety and hygiene standards as well as more effective marketing strategies to attract more tourists. With government support and innovations in wellness services, Bali has the potential to continue evolving as a premier destination for health tourism, providing transformative experiences for visitors while boosting the local economy [17].

2.4 Current Trends in Bali's Wellness Tourism

Shift in Focus: The Indonesian Minister of Health, Budi Gunadi Sadikin, emphasized the need for Bali to diversify its tourism offerings beyond cultural and natural attractions. The establishment of the NgoerahSun Wellness and Aesthetic Centre aims to create a robust medical tourism sector that focuses on wellness rather than just curative services. This center will provide a range of services, including medical check-ups, cosmetic procedures, and international-standard spa treatments, reflecting a broader trend towards health-focused travel [30].

Recognition as a Spa Destination: Bali has gained international acclaim as a premier spa destination, recognized for its high-quality wellness services. In 2017, it was named the best spa destination in the world by *Seling Travel* magazine, highlighting its exceptional service quality and unique treatments that incorporate local practices like aromatherapy. The island boasts over 200 spas affiliated with the Bali Spa and Wellness Association, contributing to its reputation as a top wellness tourism locale [31].

Strategic Development: To enhance its position in the global wellness market, Bali is focusing on strategic development in health and wellness tourism. This includes identifying target markets, differentiating from competitors, and promoting partnerships within the industry. The local government is also working on improving infrastructure to support health tourism, such as integrated services between hospitals and hotels [26].

Cultural Integration: The wellness offerings in Bali are deeply rooted in local culture, utilizing traditional healing practices and natural ingredients unique to the island. Treatments often include local herbal remedies that have been passed down through generations, enhancing the authenticity of the spa experience [32].

Market Potential: The global trend towards health and wellness tourism presents a lucrative opportunity for Bali. As more travelers seek holistic health experiences alongside leisure activities, Bali's extensive range of wellness services positions it favorably within this growing market [33].

Bali's transformation into a global center for spa and wellness is not just about expanding its tourism portfolio; it reflects a broader trend towards integrating health into travel experiences. By leveraging its cultural heritage and enhancing service quality, Bali aims to attract a diverse range of visitors seeking both relaxation and rejuvenation. This strategic shift is essential for ensuring the island's resilience against economic fluctuations in traditional tourism sectors [34].

3. METHODOLOGY

This research uses a desk research method by collecting data from secondary sources such as scientific publications, articles, and reports related to health tourism. The analysis is conducted descriptively and qualitatively to describe the current conditions and the potential development of this sector [35], [36].

The aim of this study is to analyse the position of health and wellness tourism in Bali and identify the challenges and



opportunities present in the development of this sector. Specifically, this research will assess the economic potential of health tourism by measuring its contribution to local economic growth and job creation. Additionally, the study will analyse product diversification in tourism by identifying various health and wellness services offered in Bali and their appeal to tourists [37].

To understand the impact of health tourism on quality of life, this research will evaluate how health and wellness programs can enhance visitors' quality of life. Furthermore, the study will identify global marketing strategies by analyzing Bali's position in the international health tourism market and strategies that can be implemented to improve that image. An evaluation of infrastructure will also be conducted to examine the development of medical facilities and wellness centers that support health tourism in Bali. Finally, the research will explore the integration of local culture by examining how traditional Balinese healing practices are incorporated into modern healthcare [4].

The research methodology to achieve these objectives includes both qualitative and quantitative approaches. This study will involve surveys and questionnaires directed at tourists visiting Bali to gather data on their preferences regarding health and wellness services, as well as their experiences while in Bali. Additionally, in-depth interviews will be conducted with local stakeholders such as spa owners, healthcare providers, and local government officials to gain their insights on the challenges and opportunities within this industry. A SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) will also be employed to identify internal and external factors affecting health tourism in Bali, thereby formulating more effective development strategies [38].

This research will also include case studies of existing health and wellness centers in Bali to understand best practices and innovations within the health tourism sector. Furthermore, an analysis of secondary data from industry reports, academic publications, and government statistics related to the growth of health tourism in Bali will provide a broader context for the study's findings [39].

Participatory observations at spa locations and wellness centers will be conducted to understand interactions between tourists and the services offered while identifying aspects that can be improved. This research is expected to provide a comprehensive overview of the position of health and wellness tourism in Bali, along with strategic recommendations for its future development [36].

4. RESULTS AND DISCUSSION

4.1 The IFAS and EFAS

Here is the IFAS and EFAS matrix Table 2 compiled based on qualitative data related to health and wellness tourism in Bali [7]:

Table 2. IFAS Matrix (Internal Factors)

Table with 2 columns: Internal Factors, Description. Rows include Strength: International Reputation and Recognition, Strength: Service Diversification, Weakness: Lack of Integrated Data, Weakness: Intense Competition, and Strength: Government Support.

Source: [7], [40].



This Table 3 reflects a qualitative analysis of the internal and external factors influencing the development of health and wellness tourism in Bali, providing insights into the strengths, weaknesses, opportunities, and threats present in this industry [7].

Table 3. EFAS Matrix (External Factors)

External Factors	Description
Opportunity: Growing Global Wellness Market	Increased societal awareness about health drives high demand for wellness tourism.
Opportunity: Natural Beauty and Cultural Wealth of Bali	The island's natural beauty and local culture offer unique experiences attractive to tourists.
Threat: Global Healthcare Crisis	Situations like pandemics can reduce the number of tourists and affect the tourism industry.
Threat: Regulatory Changes	New policies could influence the operational business of wellness and tourism in Bali.
Opportunity: Innovation in Health Technology	Technological advancements can enhance the quality of health services and draw more visitors.

Source: [7], [40].

1) Strengths of Health and Wellness Development in Bali

The development of health and wellness in Bali has significant strengths, supported by empirical data showing growth and potential in this sector. Here are some key aspects that illustrate the strengths of health and wellness development in Bali [41]. The following data represents the development of health and wellness service providers in Bali from the year 2000 to 2023 [42]:

- a) Data from 2000: Based on available information, in 2000, Bali had 13 hospitals/clinics providing health and wellness services.
- b) Changes Over the Years: During the period from 2010 to 2023, there was a significant increase in the number of service providers. However, exact details for each year are not fully available from the selected resources. Therefore, estimates are used based on trends indicated by other sources.
- c) Year 2023: By 2023, Bali had at least 55 health and wellness service providers, including hospitals and clinics such as Sada Jiwa Clinic, Unicare Clinic, Miracle Ultimate, Bali Dental 911, Prodia Health Care, RS Bhakti Rahayu, RSUP I.G.N.G. Ngoerah, RS Mata Bali Mandara, and RS Kasih Ibu Denpasar.

The following data shows the number of wellness service providers in Bali from 2000 to 2023 [42]:

- a) Initial Data (2000): In 2000, there were about 10 wellness service providers in Bali, including spas and health centres.
- b) Rapid Growth: From 2000 to 2023, the number of wellness service providers increased significantly, reflecting the growth of the wellness industry in Bali.
- c) Year 2023: By 2023, it is estimated that there are over 70 wellness service providers, including various clinics and wellness centres offering health, beauty, and relaxation programs.

This data reflects a growing interest in wellness tourism in Bali, which is increasingly developing alongside government efforts and industry players to position Bali as an international health and wellness destination [42]. Growth of Spa Numbers: Since 2003, the number of spas in Bali has increased by more than 160%. Currently, there are approximately 390 spas operating, with an additional 21 spas under construction. This growth reflects high demand for health and wellness services among both domestic and international tourists [41].

International Recognition: Bali is internationally recognized as one of the best spa destinations. In 2009, Bali received the "Best Destination SPA in Asia" award from the Asia Spa and Wellness Festival. At this event, 28 spas and wellness centers in Bali



received awards out of a total of 212 nominations across Asia, demonstrating the high quality of services offered [41].

Diversification of Health Services: The health and wellness industry in Bali encompasses various segments such as: (a) Medical Tourism: Offering medical services and health treatments; (b) Wellness and Spa: Focusing on relaxation and body treatments; (c) Elderly Care: Providing services for the elderly population; (d) Research and Diagnostic Services: Including facilities for health research [43]

Economic Impact: The health and wellness industry positively contributes to the local economy by creating new jobs and increasing regional income. With the growth of this sector, many local communities benefit economically through employment in spas, fitness centers, and related services [44].

Availability of Natural Resources: Bali has abundant natural resources, including medicinal plants and other natural materials used in health therapies. The use of local herbs in spa treatments adds value to tourists' experiences [45].

Global Health Trends: The demand for wellness tourism continues to rise globally as public awareness about mental and physical health increases. In Bali, this trend is reflected in the growing number of tourists seeking relaxation and healing experiences.

The strengths of health and wellness development in Bali lie in the rapid growth of spa numbers, international awards received, diversification of services offered, availability of natural resources, as well as global trends supporting demand for wellness tourism. All these factors contribute to Bali's appeal as a premier destination for health and wellness tourism worldwide [46].

2) Weaknesses of Health and Wellness Development in Bali

The weaknesses of health and wellness development in Bali can be identified through several aspects that affect the effectiveness and sustainability of this sector. Here are some key weaknesses, along with empirical data and their sources:

- a) **Lack of Integrated Data:** One of the main weaknesses in the development of health and wellness in Bali is the lack of integrated data regarding existing health facilities. Despite significant growth in the number of spas and wellness centers, data on the existence and quality of health services remains limited. This hinders more effective planning and development in this sector [13].
- b) **Intense Competition:** With the increasing number of spas and health centers, competition in this industry has become very intense. Many service providers offer similar products, making it difficult for small businesses to compete with larger brands that have more resources. Research indicates that although the spa industry in Bali has rapidly developed, many small enterprises struggle to survive because they cannot offer competitive prices or unique services [37].
- c) **Dependence on Foreign Tourists:** Health tourism in Bali heavily relies on foreign tourists. When there is a decline in the number of international visitors, such as during the COVID-19 pandemic, this sector experiences significant impacts. Data shows that Bali faced a drastic decrease in tourist visits, which directly affected revenue from the health and wellness sector [47].
- d) **Quality of Human Resources:** Despite an increase in the number of health facilities, the quality of human resources in this sector often varies. Many workers in the spa industry lack formal training or adequate certification, which can affect the quality of services provided. Research indicates that to enhance Bali's competitiveness as a wellness destination, there needs to be investment in training and skill development for local workers [7].

- e) **Lack of Regulation:** The health and wellness industry in Bali also faces challenges related to regulation. Many spas and wellness centers are not officially registered or do not adhere to established operational standards, posing risks to consumers.

This lack of regulation can harm the overall reputation of the industry and reduce tourists' trust in the services offered [48].

The weaknesses in health and wellness development in Bali include a lack of integrated data, intense competition, dependence on foreign tourists, varying quality of human resources, and insufficient regulation. To address these weaknesses, collaboration between the government, industry stakeholders, and communities is necessary to create an environment that supports sustainable growth in this sector [49].

3) Opportunities for Health and Wellness Development in Bali

The development of health and wellness in Bali presents significant opportunities, supported by various factors contributing to the growth of this sector. Here are some key opportunities for health and wellness development in Bali, along with empirical data and their sources [50].

- a) **Growth of the Spa and Wellness Market:** Since 2003, the number of spas in Bali has increased by more than 160%, with



around 390 spas currently operating and an additional 21 spas under construction. This growth reflects high demand for health and wellness services among both domestic and international tourists. This data indicates that Bali has a strong infrastructure to support health and wellness tourism [50].

- b) **Diversification of Health Services:** The health tourism market in Bali can be divided into several segments, including: (1) Medical Tourism: Medical services and healthcare; (2) Wellness and Spa: Focused on relaxation and body treatments; (3) Elderly Care: Providing services for the elderly population; (4) Research and Diagnostic Services: Facilities for health research. This diversification allows Bali to attract various types of tourists with different needs [51].
- c) **International Recognition:** Bali has been internationally recognized as one of the best spa destinations. In 2009, Bali received the "Best Destination SPA in Asia" award from the Asia Spa and Wellness Festival, where 28 spas in Bali received awards out of a total of 212 nominations. This recognition enhances Bali's reputation as a center for health and wellness [52].
- d) **Availability of Natural Resources:** Bali possesses abundant natural resources, including medicinal plants and other natural materials used in health therapies. The use of local herbs in spa treatments adds value to tourists' experiences while supporting traditional healing practices that have existed for centuries [52].
- e) **Global Health Trends:** The demand for wellness tourism continues to rise globally, driven by increasing public awareness of the importance of mental and physical health. In Bali, this trend is reflected in the growing number of tourists seeking relaxation and healing experiences [52].
- f) **Positive Economic Impact:** The health and wellness industry positively contributes to the local economy by creating new jobs and increasing regional income. With the growth of this sector, many local communities benefit economically through employment in spas, fitness centers, and related services [53].

The opportunities for health and wellness development in Bali are very promising, supported by rapid growth in the number of spas, international awards received, diversification of services offered, availability of natural resources, as well as global trends that support demand for wellness tourism. All these factors contribute to Bali's appeal as a premier destination for health and wellness tourism worldwide [13].

4) Challenges of Health and Wellness Development in Bali

The development of health and wellness in Bali faces various challenges that have been, are currently, and may likely be encountered in the future. These challenges can affect the sustainability and growth of this sector [54].

- a) **Challenges Faced:** One of the main challenges that has been encountered is the lack of integrated data regarding existing health and wellness facilities. Although the number of spas and wellness centers in Bali has increased by over 160% since 2003, with approximately 390 spas currently operating, data on the quality of services and the existence of these facilities remains limited. This complicates strategic planning for the development of this sector [55].
- b) **Current Challenges:** Currently, the health and wellness industry in Bali is also facing intense competition. Many service providers offer similar products, making it difficult for small businesses to compete with larger brands that have more resources. Additionally, dependence on foreign tourists poses a significant challenge. A decline in international visitor numbers, as seen during the COVID-19 pandemic, directly impacts revenue from the health and wellness sector [56].
- c) **Future Challenges:** In the future, Bali is likely to face challenges related to changing market trends and consumer preferences. With increasing awareness of mental and physical health, tourists may seek more holistic and integrated experiences. Therefore, health and wellness service providers need to adapt quickly to these changes to remain relevant. Furthermore, the quality of human resources in this industry also needs improvement through training and certification to meet international standards [56].

Overall, the challenges in developing health and wellness in Bali include a lack of integrated data, intense competition, dependence on foreign tourists, as well as the need to improve the quality of human resources. To address these challenges, collaboration between the government, industry stakeholders, and communities is necessary to create an environment that supports sustainable growth in this sector [13].

4.2 Strategies for Developing Health and Wellness in Bali

Developing health and wellness in Bali encounters significant challenges and opportunities, and to maximize these potentials,



strategies involving all stakeholders within the Penta helix framework tourism industry, healthcare industry, government, local community, and therapists are crucial [7]. Below are some of the best strategies that can be applied:

- 1) **Collaboration between Tourism and Healthcare Industries:** The tourism and healthcare industries must cooperate to develop packages that integrate health and wellness experiences. For instance, offering wellness retreat programs that include spa, yoga, and medical treatments at primary tourist sites. This not only attracts more tourists but also boosts earnings for both sectors [7].
- 2) **Improving Quality of Human Resources:** Governments and healthcare service providers should invest in training and certifying therapists. Enhancing the skills of local workforce improves the quality of health and wellness services, drawing more tourists. Training should cover using local natural ingredients in therapy, which becomes a unique selling point for Bali [13].
- 3) **Promoting Local Culture and Traditional Healing Practices:** Engaging local communities in developing health products utilizing traditional healing practices helps preserve local culture while offering authentic experiences for tourists. Governments can support these initiatives through promotional campaigns highlighting Bali's unique cultural contributions to wellness tourism [17].
- 4) **Regulation and Standardization:** Establish clear regulations for the healthcare and wellness industry to ensure all service providers meet certain standards. This involves registering spas and wellness centers and conducting regular audits to guarantee service quality. Strict regulations boost tourists' confidence in Bali's services [57].
- 5) **Utilizing Technology in Marketing:** The tourism industry should utilize digital technologies effectively to market health and wellness products. Leveraging social media platforms, online channels, and mobile apps helps reach a wider audience, particularly younger generations accustomed to technology [33].
- 6) **Development of Supporting Infrastructure:** Infrastructure such as transportation, accommodations, and healthcare facilities must be enhanced to support the growth of health tourism. Governments should invest in road development, accessibility to wellness locations, and sufficient medical facilities catering to tourists' needs [58].

Collaboratively implementing these strategies among all stakeholders—the tourism industry, healthcare industry, government, local community, and therapists—Bali can sustainably develop its healthcare and wellness sector. This not only elevates Bali's attractiveness as a wellness tourism destination but also provides economic and social benefits for local residents [58].

5. CONCLUSIONS AND RECOMMENDATIONS

5.1 Conclusions

Bali stands out as a premier spa destination globally due to its international reputation and recognition, drawing in numerous tourists seeking exceptional wellness experiences. The strength lies in the service diversification, where visitors can indulge in a wide array of health services, including diverse spa offerings, yoga sessions, and traditional treatments. However, internal factors also present challenges. Specifically, the lack of integrated data hinders effective monitoring and management of these health services. Additionally, intense competition among wellness service providers affects pricing and quality. Despite these weaknesses, government support plays a crucial role by promoting Bali as a wellness hub and investing in enhancing the necessary infrastructure, further solidifying its position as a leading spa destination.

The analysis of external factors affecting the wellness tourism industry in Bali reveals a complex interplay of opportunities and threats. Opportunities include the growing global wellness market, which is fueled by increasing societal awareness about health, leading to higher demand for wellness tourism experiences. Additionally, Bali's natural beauty and cultural wealth present unique attractions that appeal to tourists, enhancing its desirability as a destination. Furthermore, innovation in health technology offers potential improvements in health services, making the region more attractive to visitors seeking quality wellness experiences. However, these opportunities are countered by significant threats, notably the global healthcare crisis exemplified by the COVID-19 pandemic, which has drastically reduced tourist numbers and disrupted the industry. Regulatory changes also pose a risk, as new policies could impact operational aspects of wellness tourism in Bali. Collectively, these factors highlight the need for strategic planning to leverage opportunities while mitigating risks in order to sustain and grow Bali's wellness tourism sector.



5.2 Recommendations

To revitalize Bali's health and wellness tourism, a comprehensive strategy should be implemented that leverages the island's existing strengths while addressing its challenges. First, it is essential to capitalize on the rapid growth of the spa and wellness sector, which has seen a 160% increase in the number of spas since 2003. This can be achieved by enhancing marketing efforts to attract both domestic and international tourists, emphasizing Bali's unique wellness offerings and natural beauty.

- Diversification of health services is another crucial strategy. Bali should expand its offerings beyond traditional spa services to include medical tourism, elderly care, and advanced diagnostic services. This diversification will cater to a broader range of tourist needs and enhance the island's appeal as a holistic health destination. Furthermore, addressing challenges such as the lack of integrated data on health facilities and varying service quality is vital for sustainability. Establishing a centralized database and promoting standards across all service providers will help improve service quality and build trust among tourists.
- Regulatory frameworks must be strengthened to ensure all health and wellness services meet specific standards, thereby enhancing tourist confidence. The government should work collaboratively with stakeholders from the tourism industry, healthcare providers, local communities, and therapists in a Penta helix approach to foster sustainable development in this sector. This collaboration can lead to innovative solutions that benefit all parties involved.
- Additionally, Bali should align its offerings with global trends in wellness tourism, which continue to rise as public awareness of health issues increases. By integrating local traditions with modern wellness practices and promoting unique experiences rooted in Balinese culture, the island can differentiate itself from competitors.

Finally, ongoing research into potential new products within health tourism will be necessary to adapt to changing market demands and ensure that Bali remains a leading destination for health and wellness tourism in the future. By implementing these strategies, Bali can not only enhance its position in the global tourism market but also provide significant economic and social benefits to its local communities.

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DATA AVAILABILITY

The data used to support the research findings are available from the corresponding author upon request.

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CONFLICTS OF INTEREST

The authors declare no conflict of interest.

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