
Indonesia's Nation Branding Strategy in Developing Health Tourism: Case Study of Sanur Special Economic Zone

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Abstract

The development of the Sanur Special Economic Zone (SEZ) in Bali, represents a strategic initiative by the Indonesian government to strengthen the country's position in the global health and medical tourism sector. This study explores the institutional landscape and collaborative frameworks that shape Indonesia's health tourism sector through its nation branding strategy in the Sanur SEZ. Employing the concept of nation branding strategies, health tourism, this study analyzes how Indonesia's nation branding strategy in developing health tourism particularly within the Sanur SEZ. Using a qualitative-descriptive approach, the research identifies Indonesia's branding strategy in health tourism. Drawing on Dinnie's nation branding framework, several key strategies have been implemented: nation-brand advertising, public relations agency, online branding, social media and mobile applications, internal brand management, the naming of nation brands and the involvement of institutions. Not all strategic components of the nation branding concept have been fully implemented. The multi-actor involvement through a pentahelix model—government, academia, business, community, and media—illustrates a cross-sectoral approach to branding. The findings indicate that while the initiative is still at an early stage, significant institutional commitment has emerged, particularly through the alignment of government policy, private investment in healthcare infrastructure, and international promotion efforts. However, there remains a need for better coordination and performance measurement tools to ensure long-term success in positioning Indonesia globally in health tourism.

Keywords: Health Tourism, Medical Tourism, Nation Branding, Sanur Special Economic Zone (SEZ), Strategy

Introduction:

Health tourism has rapidly emerged as a thriving sector in Southeast Asia, with countries like Thailand, Malaysia, and Singapore successfully attracting thousands of international tourists seeking high-quality healthcare services. Ironically, despite having the largest population in

the region and significant medical resource potential, Indonesia has been experiencing a phenomenon known as outbound medical tourism. Each year, hundreds of thousands of Indonesians choose to seek medical treatment abroad (Arlinta, 2024). According to the 2023 Indonesia Health

Survey, 1 in 1,000 households in Indonesia has sought medical treatment overseas. This massive outflow of Indonesian patients results in an estimated loss of USD 11.5 billion (approximately IDR 170 trillion) annually in foreign exchange (Santoso, 2023). This trend indicates that, despite Indonesia's growing healthcare workforce and improving medical facilities, there remain challenges in building public trust in domestic medical services.

In recent years, the Indonesian government has begun to recognize health tourism as a potential economic driver, particularly by integrating this sector into Special Economic Zones (SEZs). One of the areas projected as a health tourism hub is Bali, which already holds a strong global reputation as a premier tourist destination. In Bali, the Indonesian government has established the Sanur Special Economic Zone (SEZ), officially designated as The First Indonesian Health Tourism Special Economic Zone (SEZ) under Government Regulation No. 41 of 2022 (Gadjah Mada University, 2024). Sanur was chosen due to its strategic location and its reputation as a world-class destination for international tourists (Secretariat General of the National Council for Special Economic Zones, 2024). It is also one of the oldest upscale resort areas in Bali, widely recognized among both domestic and international travellers. The establishment of the Sanur SEZ is expected to attract foreign investment, develop internationally accredited healthcare facilities, and position Indonesia as a competitive health tourism destination.

Bali holds a unique advantage compared to other health tourism destinations. Beyond its globally renowned natural and cultural attractions, Bali has already established itself as a wellness tourism hub, attracting visitors seeking holistic health treatments, spa therapies, and rehabilitation programs. This positioning could serve as a differentiating factor in Indonesia's health tourism strategy—by integrating modern medical services with relaxing tourism experiences that support patient recovery.

However, as Indonesia strives to develop this sector, a key question arises: What is Indonesia's nation branding strategy in developing health tourism, particularly within the Sanur SEZ? At the regional level, Indonesia faces strong competition from neighbouring countries that have long-established and well-executed health tourism strategies. Among the most popular ASEAN (Association of Southeast Asian Nations) destinations for health tourism are Thailand, Singapore, and Malaysia, which have successfully positioned themselves as leaders in the industry (The ASEAN Post Team, 2017). To compete, Indonesia must develop a strong and distinct national image through an effective nation branding strategy.

Furthermore, in the context of international relations, health tourism is not merely an economic and healthcare sector issue but is also closely tied to tourism diplomacy. By examining Indonesia's nation branding strategy within the context of health tourism, this study aims to contribute both academically and practically—enhancing the discourse in international relations while offering policy insights to improve Indonesia's competitiveness in the global health tourism industry. Based on this background, this research seeks to analyze Indonesia's nation branding strategy in the development of health tourism, using the Sanur SEZ as a case study.

Literature Review:

Several previous studies provide perspectives on how nation branding and health tourism diplomacy can influence international relations and a country's global position. Boan (2022), in the research *"Nation Branding: The Case for Marketing Strategy in International Relations"*, discusses how marketing strategies can be applied in international relations to build a positive national image, which can impact diplomacy, trade, and other international relations. Effective nation branding can strengthen public diplomacy and enhance a country's influence in the international arena. By building a positive image, a country can establish better diplomatic relations,

attract foreign investment, and increase exports. This study helps the author understand the interrelation of the nation branding framework, public diplomacy, and tourism.

In examining nation branding in health tourism, several ASEAN countries have developed medical tourism, such as Malaysia and Thailand. Sarana and Sari (2022) analyzed Malaysia's nation branding strategy in promoting its medical tourism industry to the Indonesian public. Using the nation branding strategy elements by Keith Dinnie (2015), this study found that Malaysia implemented various strategies specifically targeting the Indonesian public, except for the elements of nation-brand advertising and diaspora mobilization. Meanwhile, Wedana et al. (2022) discussed Thailand's strategy in developing medical tourism as part of its nation branding efforts. This research highlights the promotion of medical tourism through minimum pricing policies, the development of medical facilities and services, and Thailand's government visa policies. The authors also refer to the literature titled *India's Efforts to Become a Medical Tourism Destination in South Asia During the Presidency of Pranab Mukherjee (2012–2017)*, written by Anna Rachmawati. This study discusses India's policy initiatives that have influenced the development of its medical tourism industry, using the concept of nation branding by Keith Dinnie (Rachmawati, 2020).

Among previous studies, none have specifically examined Indonesia's nation branding strategy in developing health tourism. Lestari et al. (2025) discuss Indonesia's nation branding efforts in enhancing international tourism in general. Their study explores tourism diplomacy carried out by the Indonesian government and society to strengthen the country's nation branding at the international level. Although it does not focus on health and medical tourism, this research provides insights into how nation branding strategies can enhance Indonesia's tourism competitiveness as a whole. Health and medical tourism in Indonesia is still a relatively new tourism sector, requiring

further research. This study seeks to fill the research gap on Indonesia's health tourism from an international relations perspective.

To understand the development of Indonesia's medical tourism industry, the author draws upon several scholarly works. One such work is by Berliandaldo and Muhadli (2022), which discusses strategies for developing medical tourism in East Kalimantan within the context of the establishment of the new capital city, Ibu Kota Nusantara (IKN). This study offers valuable insights into how emerging regions such as East Kalimantan can be positioned as national and international medical tourism destinations. However, its locus of analysis differs from that of the present study, which focuses specifically on Bali.

Another relevant source is the work of Rosalina et al. (2015), which examines the opportunities for developing medical tourism in Bali through a SWOT analysis. The study identifies Bali's key strengths, including its international tourism appeal, the presence of representative private medical facilities, and the cultural and spiritual values that support health tourism. This literature is pertinent in reinforcing the argument that the development of medical tourism in Indonesia—particularly in Bali—requires a systemic approach and sustained policy support.

Theoretical Framework:

Nation Branding

Nation branding is an intriguing and complex phenomenon as it combines various characteristics of a nation with the aim of distinguishing one country from another to attract international attention (Dinnie, 2015). To showcase a country's identity as a global public appeal, build trust in cooperation, and establish networks worldwide, nation branding is necessary beyond merely promoting slogans. The purpose of nation branding is to create a positive image of a country; therefore, it serves the function of building, developing, and maintaining a nation's positive reputation. This effort seeks not only to attract

domestic and international tourists but also investors, boost exports and imports, and draw consumers from around the world to purchase the goods or services offered by a country.

According to Dinnie (2015), nation branding strategies include:

1. Nation-brand advertising

In conducting this campaign, Dinnie suggests that governments can collaborate with advertising agencies that follow given briefs and produce advertisements that effectively communicate the intended message in an engaging manner.

2. Public Relations

Public relations agencies are often used by governments to manage a country's perception, not only among the general public but also among journalists and policymakers.

3. Online Branding, Social Media, and Mobile Applications

The development of an online image through social media and mobile applications.

4. Customer and Citizen Relationship Management

Expanding brand influence by understanding the audience's needs and utilizing appropriate communication methods.

5. Nation-Brand Ambassadors

This strategy involves appointing ambassadors who can convey messages and shape a well-recognized nation brand.

6. Internal Brand Management

Encouraging brand value enhancement, as actors indirectly represent the brand being developed.

7. Diaspora Mobilization

The presence of a global diaspora network serves as a potential asset, not only in terms of remittances but also in strengthening a nation's brand.

8. Nation Days

A nation-brand strategy that serves both internal and external purposes—externally as an opportunity to promote the nation brand, and

internally to foster national pride and domestic interest.

9. The Naming of Nation-Brands

The implementation of a name, including slogans, that highlights the distinctiveness of a particular brand.

10. Performance Measurements

Nation branding strategies must be continuously evaluated for effectiveness. Several commonly used indexes for performance assessment include the Anholt-GMI Nation Brand Index, Environmental Sustainability Index, and the World Economic Forum Global Competitiveness Index.

11. Institutions Involved in Nation Branding

The establishment of new institutions specifically focused on managing a nation's branding efforts. Given the various strategies and the involvement of both state and non-state actors, such institutions play a crucial role in organizing these efforts.

Additionally, the key actors functioning as Nation Brand Identity Communicators—those who convey the essence of nation branding—include notable individuals, branded exports, diaspora sports achievements, marketing communications, brand ambassadors, cultural items, and government foreign policy (Dinnie, 2015). The concept of nation branding will be used to analyze the Indonesian government's strategy in developing health and medical tourism in the Sanur SEZ, as well as the actors involved in implementing these strategies

Health Tourism

Health tourism is a growing phenomenon that has developed alongside globalization. Health tourism is a rapidly expanding sector of the tourism industry, involving travel motivated by health concerns, healing needs, or personal wellness aspirations (Henderson, 2004). It is a form of tourism that aims to enhance and balance an individual's well-being in terms of body, mind, and spirit. Health tourism encompasses both

medical tourism and wellness tourism (UNWTO, 2018). According to Bookman and Bookman (2007), health tourism includes not only medical treatment abroad but also non-clinical services such as spa therapies, physical exercise, and dietary programs, often provided in exotic or natural environments. Based on these definitions, health tourism can be understood as a form of travel intended to improve a person's health, which is not limited to specific medical procedures, but also includes efforts to enhance overall health and well-being.

The terms health tourism and medical tourism are often used interchangeably. However, the two concepts differ fundamentally in their focus and the types of services offered. According to the United Nations World Tourism Organization (2018), medical tourism is a subset of health tourism, specifically centered on medical interventions such as diagnosis, treatment, and surgery, which typically require healthcare professionals and medical facilities. Medical tourism refers to the travel across international borders for the purpose of receiving medical care (Bookman & Bookman, 2007). Medical tourism is thus considered a more specific market segment within health tourism (Goeldner, 1989, pp. 6–7). It focuses on specialized medical treatment, such as surgeries or other clinical procedures, where patients seek medical services that may be more affordable, of higher quality, or unavailable in their home countries.

The development of this sector has led to the emergence of a new tourism industry with a purpose distinct from conventional travel—namely, to obtain specific medical treatments. Countries around the world, especially in Asia such as Malaysia, Thailand, Singapore, and India, have become prominent international medical tourism destinations due to their strong appeal in providing medical services (Reddy et al., 2010, p. 510). Investment in the medical industry is considered a strategy to increase gross domestic product (GDP), generate foreign exchange, and improve both healthcare services and the tourism

sector. Medical services have been developed to attract regional patients through collaboration among various stakeholders. Each country also tends to specialize in particular medical procedures that serve as their competitive advantage—for instance, Thailand and South Korea for plastic surgery, Eastern European countries for dental surgery, Singapore for stem cell treatments, and Malaysia for oncology (Smith et al., 2011, p. 227).

In this study, the concepts of health tourism will be used to examine the nation branding strategy in the development of tourism at Sanur SEZ, Bali by the Indonesian government. This study adopts the concept of health tourism because it offers a broader framework that goes beyond medical tourism to include various aspects of wellness and holistic health. This comprehensive approach corresponds with Indonesia's nation branding strategy, which seeks to position the country as both a medical and wellness tourism destination.

Methodology:

In this study, the author employs a qualitative research method with a case study approach, which is a comprehensive, intensive, detailed, and in-depth research design aimed at examining contemporary (time-bound) issues or phenomena. Utilizing the phenomenological paradigm, the case study approach focuses on a specific object selected as a case to be examined in depth, enabling the unveiling of realities behind the phenomenon (Rahardjo, 2017). This approach is widely used in social sciences, including international relations, as it allows researchers to explore an event, policy, or strategy from multiple perspectives. In this study, the research focuses on the implementation of Indonesia's nation branding strategy in the development of health tourism in Bali, specifically through the case of the Sanur SEZ. The temporal scope of this research is limited to the second term of President Joko Widodo's administration, specifically from 2019 to 2024. By systematically analyzing a single case, this research aims to provide both academic

insights and practical recommendations for government policies and the tourism sector.

In data collection, the author will employ the library research method by gathering data from the official websites of the Indonesian government, such as the Ministry of Tourism and Creative Economy and Indonesia SEZ, while also seeking research data from literature and other sources. The author will use materials from news sources, the internet, and other reliable references in addition to secondary sources based on previous studies. Data falling within the defined timeframe of the study will be analyzed using the concepts of nation branding and health tourism, and will be presented in a narrative form.

Result and Discussion:

An Introduction to Special Economic Zones in Indonesia

Indonesia has established a well-structured and strategic policy framework to drive the development of Special Economic Zones (SEZs), recognizing them as key engines for national economic transformation. Special Economic Zones (SEZs) are government policies aimed at promoting economic growth, attracting investment, and enhancing the competitiveness of a region. SEZs typically refer to designated areas equipped with special facilities and incentives designed to attract both domestic and foreign investment. The regulatory framework governing Special Economic Zones in Indonesia is established through several legal instruments, with the primary ones being Law No. 39 of 2009 on Special Economic Zones and Government Regulation No. 40 of 2021 concerning the Administration of Special Economic Zones. In addition, various Presidential Regulations and Ministerial Regulations further govern specific aspects of SEZs, including Presidential Regulation No. 8 of 2022 and several regulations issued by the Ministry of Finance.

These SEZs serve not only as magnets for foreign direct investment (FDI), but also as pivotal instruments for balanced regional development

and economic diversification. The Indonesian government has deliberately made SEZs a cornerstone of its long-term economic strategy, aiming to decentralize growth from the densely populated island of Java by promoting industrialization and tourism in other parts of the archipelago (Medina, 2023). The overarching goals of this initiative are multifaceted: to attract significant foreign capital, stimulate sectoral growth, and promote economic inclusivity across the nation's diverse regions. By prioritizing locations outside Java, the government seeks to create new growth poles in underdeveloped or emerging areas, thereby narrowing the development gap and fostering nationwide economic resilience. According to Medina (2023), these SEZs are expected to generate more than US\$50 billion in foreign investment over the coming decade, signaling Indonesia's bold ambition to become a regional economic powerhouse.

The SEZs have been designed to support a broad spectrum of high-priority sectors, including manufacturing, resource processing, health and wellness services, digital innovation, tourism, and the creative industries. As of the 2022–2024 planning period, Indonesia has designated approximately 19 to 20 SEZs throughout the country. Out of these, 12 are already operational, while the remaining zones are in various stages of development. These include industrial-focused zones such as Arun Lhokseumawe, Kendal, and Batam Aero Technic, alongside tourism and health-oriented zones like Mandalika in West Nusa Tenggara and Sanur in Bali.

Special Economic Zones (SEZs) in Indonesia, including the Sanur SEZ, represent a government initiative aimed at attracting investment and stimulating economic growth, particularly in the tourism and health sectors. To achieve these objectives, the government provides a range of fiscal and non-fiscal incentives designed to create a conducive environment for investors. One of the primary forms of support is fiscal incentives. These include, among others, reduced corporate

income tax rates for companies operating within SEZs. In addition, there are income tax exemptions or reductions for foreign workers employed in SEZs. These incentives are intended to encourage companies to recruit skilled professionals who may not be readily available in the local labor market. The government also offers exemptions from Value Added Tax (VAT) on goods and services used in the construction and operation of businesses in SEZs. Furthermore, capital goods and raw materials imported for use in SEZ business activities may be exempted from import duties. These fiscal measures are crucial for reducing operational costs and enhancing the competitiveness of companies in the market. Moreover, certain regional taxes, such as hotel and restaurant taxes, may also be reduced or waived to support the development of the tourism sector within the zone. On the fiscal side, according to the Secretariat General of the National Council for Special Economic Zones (2024), investors benefit from corporate income tax reductions, exemptions from excise duties, and long-term tax holidays with some lasting up to 20 years for investments exceeding IDR 1 trillion.

Complementing these are non-fiscal incentives such as simplified visa and immigration procedures, land-use rights that may extend up to 80 years, eased regulations on foreign ownership, and fast-tracked processing of permits for foreign professionals and capital inflows. One such facility is the simplification and acceleration of licensing processes, which serves as a significant advantage for investors seeking to establish and operate businesses within the zones. The government is also committed to providing essential infrastructure, such as roads, electricity, and clean water, to support business operations. Access to financing is another important non-fiscal support, with measures in place to facilitate investors' access to funding from financial institutions. Human resource development programs, including training and skills enhancement initiatives, are also prioritized by the government to improve the quality of the workforce within SEZs. Complementing these are non-fiscal incentives

such as simplified visa and immigration procedures, land-use rights that may extend up to 80 years, eased regulations on foreign ownership, and fast-tracked processing of permits for foreign professionals and capital inflows.

Moreover, the government supports the promotion and marketing of products and services produced in SEZs, both domestically and internationally. Finally, investment protection guarantees are provided, including legal safeguards for assets and business activities, ensuring that investors feel more secure in undertaking investment within SEZs. With the provision of these fiscal and non-fiscal incentives, the government aims to create a conducive environment for investment within SEZs, stimulate economic growth, and promote the development of these areas—including the Sanur SEZ—as leading health tourism destinations.

Sanur Special Economic Zone

The Sanur SEZ is one of the Indonesian government's strategic initiatives aimed at developing Sanur, Bali, as a premier health tourism destination. The Sanur SEZ is expected to attract investment, boost the local economy, and strengthen Indonesia's position as a leading health tourism destination in Southeast Asia. The establishment of the Sanur SEZ was formalized through Government Regulation of the Republic of Indonesia No. 41 of 2022 concerning the Sanur SEZ, which came into effect on November 1, 2022.

Sanur SEZ itself is one of the SEZ focusing on tourism, more specifically health tourism. Located in the hearts of Bali, Sanur SEZ has the potential to be a world class destination for health tourism. As the first step of achieving said potential are policies specific for SEZs. According to Santhi et al. (2024) Indonesia's policy regarding the Sanur SEZ is designed to stimulate local economic development by integrating environmental, social, and economic dimensions. This strategic initiative is primarily grounded in Law Number 10 of 2009 on Tourism and Government Regulation in Lieu of Law (Perppu) Number 44 of 2022 concerning

Special Economic Zones. These legal instruments provide a comprehensive foundation for the establishment and governance of the Sanur SEZ. A key pillar of this policy is the legal framework and regulatory clarity provided by Perppu No. 44/2022. This regulation outlines detailed procedures for the establishment, management, and operational criteria of the Sanur SEZ, including its geographical boundaries. By setting clear guidelines, the policy ensures that development within the zone aligns with national objectives and local priorities. (Santhi et al., 2024) The policy also focuses heavily on economic optimization, aiming to unlock Sanur's economic potential in a way that benefits local communities. While tourism remains a cornerstone of the area's economy, the government seeks to expand opportunities across multiple sectors to generate sustainable economic growth and improve public welfare.

To this end, sector diversification is strongly encouraged. While Sanur continues to build on its reputation as a prime tourist destination, the SEZ is also being positioned to grow in fields such as creative industries, organic agriculture, and ecotourism. Moreover, a major strategic objective is to develop Sanur into a leading hub for health tourism, attracting both domestic and international visitors seeking healthcare and wellness services. Infrastructure development is another crucial component of the policy. The government recognizes that well-developed infrastructure such as roads, public transport systems, digital connectivity, and utilities is essential for enabling tourism and investment to thrive. Continuous improvements in these areas are seen as foundational to the long-term success of the Sanur SEZ (Santhi et al., 2024). Importantly, the policy takes a proactive stance on environmental sustainability and cultural preservation. Given Sanur's ecological sensitivity and cultural richness, economic development must be carefully balanced with protective measures. Initiatives include sustainable beach management, biodiversity conservation, and the promotion of environmentally conscious tourism models,

ensuring that economic growth does not come at the expense of natural or cultural assets. In addition, economic inclusiveness and community participation form a core aspect of the policy. Local communities are encouraged to actively participate in economic activities within the SEZ, with the government facilitating access to skills training, education, and business opportunities. By prioritizing community involvement, the policy aims to ensure that the benefits of development are equitably distributed and socially sustainable. The integration of technology and innovation also plays a significant role in the Sanur SEZ's policy framework. By promoting research and development, supporting local start-ups, and investing in technology hubs, the government seeks to drive job creation, enhance productivity, and future-proof the local economy against global shifts. Lastly, the policy emphasizes the need for collaboration among various stakeholders. Effective coordination between the central government, local authorities, private sector players, and educational institutions is seen as vital for overcoming regulatory bottlenecks and ensuring the efficient execution of infrastructure and investment plans. Such collaboration is also key to building a skilled workforce that can meet the evolving needs of the zone.

Nation Branding Strategy in Developing Sanur SEZ

The development of the Sanur SEZ not only reflects Indonesia's efforts to enhance the competitiveness of its tourism and health sectors but also constitutes an integral part of a broader nation branding strategy. *Nation branding* refers to a country's systematic efforts to construct and promote a positive image at the international level through various instruments, including economic policy, public diplomacy, and the development of flagship destinations. The nation branding strategy in the development of the Sanur SEZ forms part of the Indonesian government's initiative to position the country as a leading destination in the *medical and health tourism* sector. The Sanur SEZ is envisioned as a new national branding icon that

integrates internationally standardized healthcare services with the unique appeal of Bali's tourism and cultural heritage.

Drawing on Dinnie's (2015) concept of nation branding, this study analyzes Indonesia's nation branding strategies in promoting health tourism through the development of the Sanur SEZ. These strategies include:

1. Nation-brand advertising

In achieving its goals as a world renowned health tourism hub, Sanur SEZ has applied several nation branding strategies, one of them is nation brand advertising. According to Dinnie (2015) nation brand advertising is a component of a nation's overall branding strategy, not the entirety of it. It is a powerful tool that, when part of an integrated strategy with clear goals, can deliver numerous benefits. These benefits can include generating new markets, revitalizing a declining brand, changing consumer behavior, and increasing sales rapidly. In Sanur SEZ's case, according to several marketing news reports, the Indonesian Government has appointed Juicebox marketing agency as the leading marketing agency for the Sanur SEZ project, tasked with positioning Bali as a premier global wellness and tourism destination through cutting-edge design, technology, and strategic marketing solutions (Carmona, 2024). The appointment itself highlights the Indonesian Government's commitment to professionalizing and globalizing its approach to health and wellness tourism branding. By collaborating with an experienced international agency like Juicebox, the government signals a shift toward a more deliberate and targeted nation branding effort, one that aligns with global marketing standards and resonates with international audiences. This strategy reflects the government's awareness that nation brand advertising involves not only the promotion of tourism attractions, but also the construction of a cohesive national narrative that projects Indonesia, specifically Bali, as a trusted, high-quality destination for health and wellness. Juicebox's involvement brings in expertise in digital storytelling, visual identity, user experience

design, and data-driven campaign strategies, all of which are critical in building brand credibility in a competitive global health tourism market (Carmona, 2024).

Moreover, this partnership indicates a broader effort to reposition Bali beyond its traditional image as a leisure destination. Through nation brand advertising, the Sanur SEZ is being reimagined as a space that harmonizes modern healthcare infrastructure with traditional Balinese wellness philosophies, promoting both cutting-edge medical services and holistic treatments rooted in local culture. This dual appeal of scientific credibility and cultural authenticity, is a strategic differentiator in the wellness tourism sector. Additionally, the integration of design and technology into the branding strategy suggests a focus on building not only a strong visual and emotional identity for Sanur SEZ but also an efficient digital presence (Dinnie, 2015). This includes user-friendly websites, interactive virtual experiences, and personalized health tourism itineraries, all tailored to the expectations of global health tourists, especially those from high-income countries or regions with aging populations seeking long-term wellness care. The government's branding approach also aligns with Dinnie's (2015) view that nation brand advertising must be embedded in a cohesive and cross-sectoral strategy. This means coordinating efforts across ministries, private healthcare providers, travel agencies, and hospitality services to ensure that the brand promise made in advertising is delivered on the ground. A failure to integrate branding with real-world experience could harm trust and reduce return visits, something the Sanur SEZ branding strategy seeks to avoid through careful planning and stakeholder engagement. In short, the use of nation brand advertising in the Sanur SEZ case is not just a promotional tactic, it is a strategic instrument for economic transformation. It enhances Indonesia's visibility in the lucrative health tourism market, reinforces its soft power, and contributes to sustainable development goals by stimulating investment, creating high-quality jobs, and advancing

healthcare innovation. Through the synergy of strategic branding, policy support, and global marketing expertise, Sanur SEZ is positioning itself as not just a destination, but a world-class brand.

2. Public Relations Agency

The Indonesian Health Tourism Board (IHTB) is an institution established by the Government of Indonesia as a coordinating and promotional authority for the development of the national health tourism sector. The existence of IHTB is a critical component of Indonesia's broader efforts to compete with neighbouring countries such as Thailand, Malaysia, and Singapore, which have long established themselves as leaders in the medical and wellness tourism industries. IHTB was officially founded in 2021 through the Decree of the Minister of Health of the Republic of Indonesia No. HK.01.07/MENKES/1314/2021. Although it operates under the coordination of the Ministry of Health of the Republic of Indonesia, the board adopts a cross-sectoral approach, serving as a collaborative platform between the Ministry of Health, the Ministry of Tourism and Creative Economy, the Ministry of State-Owned Enterprises (BUMN), and key stakeholders from the health and tourism industries (Ministry of Health of the Republic of Indonesia, 2021).

IHTB has taken the initiative to promote Indonesian health tourism in various international forums, travel expos, and digital media platforms. The branding narrative "Healthy Journey in Wonderful Indonesia" exemplifies IHTB's strategic positioning to highlight Indonesia as a compelling health tourism destination. Moreover, IHTB facilitates partnerships between local hospitals and global medical institutions, such as the collaboration between Sanur SEZ and Mayo Clinic, as well as joint branding initiatives with local tourism sectors.

3. Online Branding, Social Media and Mobile Applications

In addition, the Indonesian Government also applies other nation branding tactics, one of which

is online branding via several Sanur SEZ online platforms such as website and Instagram page. Online nation branding has become an essential component of modern nation-branding efforts, harnessing the expansive reach and interactivity of the internet to help countries establish a competitive global presence. As Dinnie (2015) suggests, the digital landscape enables nations to communicate their identity, values, and strengths to diverse global audiences in real time, creating new opportunities for engagement and influence. One of the most transformative aspects of online nation branding is its democratizing power. The internet serves as a powerful equalizer, allowing countries of all sizes and economic statuses to gain global visibility simply by maintaining an engaging and informative online presence. For smaller or developing countries with limited budgets for traditional advertising, this digital accessibility is especially advantageous. It enables them to amplify their nation brand without the high costs associated with print, television, or outdoor media campaigns (Dinnie, 2015). Furthermore, niche market positioning becomes more achievable through digital platforms. Online branding allows countries to identify and attract specific target audiences, such as eco-conscious travellers, digital nomads, or wellness seekers, through curated content, search engine optimization, and social media targeting (Dinnie, 2015). In the case of Sanur SEZ, this strategy is particularly relevant, as the zone seeks to position itself within the global medical and wellness tourism niche. Through targeted online campaigns, Sanur can attract health-conscious travellers looking for personalized, culturally rich, and sustainable healthcare experiences in Bali. Digital branding also facilitates word-of-mouth marketing, one of the most powerful and organic forms of brand promotion. Sanur SEZ can benefit from viral content, influencer partnerships, and brand advocacy programs that generate authentic buzz and build credibility with international audiences (Dinnie, 2015). These strategies are not only cost-effective but also highly impactful, as they rely on peer-to-peer communication and user-

generated content, elements known to influence travel and investment decisions (Dinnie, 2015).

Another key component is presence on social media and virtual platforms. Countries and destinations now engage with global users in virtual environments, such as digital tourism expos or on popular social media channels such as Instagram and LinkedIn. Sanur SEZ can leverage these tools to showcase its state-of-the-art facilities, Balinese wellness heritage, and investment opportunities through virtual tours, live Q&As, and behind-the-scenes storytelling. Finally, the rise of consumer-generated media has shifted the branding conversation from a one-way monologue to an interactive dialogue. Users now actively shape a nation's brand through reviews, comments, and content creation. For Sanur SEZ, this means that successful branding will require openness and flexibility, allowing patients, tourists, and local entrepreneurs to contribute to and co-create the destination's narrative. By embracing user feedback, testimonials, and social proof, Sanur SEZ not only strengthens its legitimacy but also fosters a sense of community and trust. In essence, Sanur SEZ's online branding strategy must be more than just a digital extension of traditional marketing, it must be interactive, inclusive, and integrated, capitalizing on the full spectrum of digital tools to establish itself as a global leader in wellness and health tourism.

4. Internal Brand Management

Another significant nation branding strategy implemented by the Indonesian government is internal brand management, a concept that emphasizes the importance of aligning domestic stakeholders with the broader goals and identity projected by the nation brand. As defined by Dinnie (2015), internal brand management is not just about communicating a brand to external audiences, but about cultivating a shared sense of purpose, commitment, and pride among citizens, institutions, and key national actors. It ensures that those within the country, whether public servants, business leaders, or local communities, are not only aware of the brand's vision but are also

actively contributing to its realization. In the context of the Sanur SEZ, internal brand management is vividly exemplified through the strong involvement of state-owned enterprises (BUMN).

The role of BUMN in the Sanur SEZ is not limited to funding or administrative support; it is deeply strategic and multifaceted, anchoring the health and wellness branding vision with long-term national interest (Kementrian BUMN, 2024). These enterprises serve as internal brand champions—entities that embody and operationalize Indonesia's aspiration to become a global health tourism hub. Their participation ensures that the vision for Sanur SEZ is not only externally marketed to international tourists and investors but is also embraced and driven by the nation's own institutional frameworks. One of the cornerstone players in this endeavor is PT Hotel Indonesia Natour (HIN). As the owner of the 41.26 hectares of land designated for the SEZ, HIN is in a unique position of influence (Kementrian BUMN, 2024). Beyond managing land assets, the company is spearheading efforts to attract investments into state-of-the-art health and wellness facilities. These range from aesthetic clinics and fertility services to stem cell therapy and elderly care centers. HIN's engagement underscores the integration of internal branding values, professionalism, innovation, and strategic global outlook, into the very core of national development projects (Kementrian BUMN, 2024). Equally important is the contribution of Indonesia Healthcare Corporation (IHC), the BUMN holding company for state-run hospitals. IHC is tasked with developing the Bali International Hospital (BIH) within the SEZ, envisioned to become a flagship institution offering world-class medical services. The hospital will feature advanced medical specialties such as cardiology, oncology, and neurology, aiming to provide care on par with leading international standards. Through this project, IHC not only delivers critical health infrastructure but also reinforces the credibility of Indonesia's health tourism brand, showing that it

is not merely a marketing promise, but a commitment backed by institutional excellence.

The strategic vision is further supported by the Ministry of State-Owned Enterprises, under the leadership of Minister Erick Thohir, who has been a vocal proponent of innovation-driven and sustainable development (Kementrian BUMN, 2024). Thohir has framed Sanur SEZ as a model zone, a blueprint for replicable health tourism ecosystems throughout Indonesia. His emphasis on internal alignment reflects a deep understanding of internal brand management: that successful nation branding starts at home, with coherent leadership and inter-agency collaboration. By rallying BUMN entities under a common vision, the Ministry is effectively aligning national capacity with global aspirations. This alignment is not just rhetorical, it materializes in concrete projects like the Alster Lake Clinic, a stem cell therapy facility created through collaboration between HIN, PT Asoka Bunga Khatulistiwa, and Germany's Alster Lake Clinic. The international partnership speaks to the government's openness to global collaboration, but the leadership and drive from BUMN signal Indonesia's confidence in its own institutions. The ground breaking ceremony, personally attended by Minister Thohir, symbolized more than just project commencement, it was a moment of internal brand affirmation, demonstrating that Indonesian stakeholders are not only on board but are leading the charge toward a new era of global competitiveness in health and wellness. Overall, the Sanur SEZ serves as a powerful case study in how internal brand management can be operationalized through state-owned enterprises. BUMN are not passive implementers but active architects of the brand Indonesia seeks to project, modern, professional, inclusive, and globally engaged. Their work in Sanur represents an internal consensus and a shared strategic direction, turning branding from a promotional campaign into a nation-building project.

5. The Naming of Nation-Brands.

In the context of nation branding, the naming of a brand plays a crucial role in shaping the identity and image of a location. An attractive and memorable brand name for Sanur SEZ contributes to building a strong identity. A name that reflects the values of health and Balinese culture can enhance the appeal of the destination. In the case of the Sanur SEZ, the use of names such as "*Sanur Special Economic Zone*" and "*World Class Medical & Wellness Destination*" forms part of a deliberate naming and positioning strategy aimed at attracting both tourists and investors. These names not only reflect the core purpose of the zone but also build a positive image that enhances Indonesia's health tourism attractiveness.

The designation "*Sanur Special Economic Zone*" explicitly identifies Sanur as a Special Economic Zone, signifying that the area holds a specific legal and infrastructural status designed to support investment and development. By including the term "*Special Economic Zone*," the government underscores its commitment to creating a conducive environment for business and investment, particularly in the health and wellness sectors. This designation provides assurance to investors that the area is supported by the state in terms of regulation and infrastructure. The naming also serves to attract investors seeking opportunities in the health and wellness industry, reinforcing the perception that the zone has strong potential for growth and profitability (Ministry of Tourism and Creative Economy of the Republic of Indonesia, 2021).

The use of the term "*World Class*" in "*World Class Medical & Wellness Destination*" positions the Sanur SEZ within a global context, indicating that it offers medical and wellness services on par with international standards. This is particularly important for attracting tourists who are seeking high-quality health experiences. The name creates a positive expectation among potential visitors, which may increase their interest and likelihood of visiting the destination. By emphasizing the "*world class*" aspect, the area appeals not only to

domestic travellers but also to international health tourists.

According to a report from the Ministry of Tourism and Creative Economy (2021), the Sanur SEZ is targeted to attract one million health tourists by the year 2025, with significant contributions expected toward regional revenue. Strategic naming such as “*Sanur Special Economic Zone*” and “*World Class Medical & Wellness Destination*” is expected to support this target by enhancing the zone's appeal to both tourists and investors. The selection of names for branding the Sanur SEZ is grounded in the goal of creating a strong identity, capturing attention, and building a positive image as a health tourism destination. By incorporating aspects such as economic status, service quality, and local cultural values, these names are designed to maximize the attractiveness of the zone to prospective visitors and investors.

The use of “*Sanur Special Economic Zone*” and “*World Class Medical & Wellness Destination*” constitutes an integral part of Indonesia's nation branding strategy. These names not only create a strong identity for the Sanur SEZ but also contribute to building a positive image, raising awareness, and attracting investment and tourism. With appropriate naming strategies, the Sanur SEZ has the potential to become a leading destination in Indonesia's health tourism landscape.

6. Institution Involved in Nations Branding

The development of the Sanur SEZ as a health tourism destination cannot be separated from Indonesia's broader nation branding strategy. As part of the effort to position Indonesia as a leading hub for medical and health tourism in Southeast Asia, Sanur SEZ involves a variety of strategic cross-sectoral actors working within a collaborative *pentahelix* model. This approach includes five key pillars: government, academia, business, community, and media.

First, the central government plays a key role as the policymaker and primary facilitator. The

Ministry of Tourism and Creative Economy (Kemenparekraf) promotes Sanur SEZ as part of the national tourism campaign *Wonderful Indonesia* and employs tourism diplomacy to enhance the international appeal of the destination. The Ministry of Health (Kemenkes) ensures that medical services in the zone meet international standards, including accreditation and quality of human resources. Meanwhile, the Ministry of Investment/BKPM and the Ministry of Finance play crucial roles in providing fiscal and non-fiscal incentives, such as income tax exemptions, import duty relief, and licensing facilitation through the OSS (Online Single Submission) system (Government Regulation No. 40/2021; Presidential Regulation No. 8/2022).

Second, from the business sector, the state-owned tourism enterprise PT Aviassi Pariwisata Indonesia (InJourney) and its subsidiary PT Hotel Indonesia Natour (HIN) are responsible for the development and management of KEK infrastructure, including the construction of the Bali International Hospital (RSIB). RSIB is designed as a globally accredited medical facility intended to attract health tourists from various countries. In its development, the government has partnered with the Mayo Clinic from the United States to provide technical assistance and medical staff training. The involvement of this global actor is a strategic effort to enhance international confidence in Indonesia's healthcare system and to strengthen the country's position in the regional health tourism map (Kompas, 2023; CNBC Indonesia, 2023).

Third, academic institutions such as Udayana University and Airlangga University have participated in medical research, training programs, and curriculum development aligned with the needs of the health tourism industry. This academic role serves as a bridge between industrial needs and human resource readiness, while also fostering sustainable innovation in service delivery (Warta & Gorda, 2023; Dwiastuti et al., 2022).

Fourth, the role of the local community in Sanur is vital to ensuring the social acceptability of the KEK project. Community engagement is not only intended to foster a sense of ownership but also to preserve Balinese local values, which are a significant element in the attractiveness of wellness tourism. Local wisdom, such as *melukat* purification rituals, holistic healing approaches, and cultural aesthetics, serves as added value in culturally grounded health tourism experiences (Bappenas, 2023).

Fifth, the role of media and public communication is indispensable. National and international media contribute to constructing a positive narrative of Sanur SEZ as a symbol of Indonesia's transformation in the health and tourism sectors. Digital campaigns, news coverage, and social media serve as primary platforms to convey Indonesia's image as a healthy, modern, and spiritually rich destination.

Overall, the cross-sectoral collaboration in the development of Sanur SEZ demonstrates that this project goes beyond the economic zone framework; it is transformed into a strategic instrument for Indonesia's nation branding. Through synergy among government, private sector, academia, community, and media, Sanur SEZ is envisioned to become Indonesia's new global face in the health tourism industry. The involvement of various institutions, such as the Ministry of Tourism, the Ministry of Health, and private sector entities, plays a crucial role in supporting nation branding efforts. Inter-agency collaboration strengthens the coherence and effectiveness of the message conveyed to both domestic and international audiences.

Referring to the nation branding framework proposed by Dinnie (2015), Indonesia's strategy in building its national image through the health tourism sector at the Sanur SEZ remains in its early stages. Not all strategic components of the nation branding concept have been fully implemented. Key elements such as Customer and Citizen Relationship Management, Nation-Brand Ambassadors, Diaspora Mobilization, Nation

Days, and Performance Measurements have not yet been prominently featured in the development process of Sanur SEZ. This indicates that Indonesia's nation branding efforts in this sector are still partial and require a more structured and comprehensive approach.

Nevertheless, the current policy direction reflects a long-term vision to position Sanur SEZ as the new face of Indonesia in the field of health tourism. Sanur SEZ is being developed not only as a center for internationally standardized medical services, but also as a holistic recovery space that integrates wellness tourism grounded in local cultural values. This approach creates a strong value differentiation compared to other Southeast Asian countries such as Thailand, Malaysia, and Singapore, which predominantly emphasize technological medical services.

Strategically, Sanur SEZ is positioned as a vital instrument for expanding Indonesia's influence in the international health tourism market. The zone also plays a role in strengthening national identity through the synergy between the health sector, creative economy, and cultural heritage. These efforts align with Indonesia's economic diplomacy vision, which prioritizes sustainable development and the strengthening of the country's global standing.

Furthermore, the establishment of Bali International Hospital (RSIB) as a flagship project within Sanur SEZ, in collaboration with global medical institutions, serves as a tangible step in building international trust in Indonesia's medical service capabilities. This strategy aims to shape the perception of Indonesia not only as an exotic destination rich in culture and tourism, but also as a country capable of delivering high-quality health and recovery services. This aligns with the national brand identity dimensions that emphasize hospitality, affordability, healthcare quality, and a holistic healing experience.

Beyond the medical aspect, the promotion of Sanur SEZ as a health tourism destination is also reinforced through the integration of modern medical technologies, the availability of

professional human resources, and a healing environment rooted in local wisdom. Traditional practices such as *healing*, *melukat*, and spiritual wellness serve as unique elements that strengthen Indonesia's positioning as a culturally based wellness tourism destination.

In conclusion, the development of Sanur SEZ is not merely an infrastructure and investment project, but also a strategic instrument in Indonesia's nation branding process. This strategy is expected to enhance international public trust, attract health tourists from both regional and global markets, and position Indonesia as a key player in the medical and health tourism industry in Southeast Asia.

Conclusion:

The development of the Sanur SEZ exemplifies a strategic shift in Indonesia's nation branding agenda by positioning the country as a credible and competitive player in the global health tourism industry. As part of a broader nation branding strategy, Sanur SEZ integrates internationally standardized healthcare services with Bali's cultural heritage, making it a unique destination for wellness and health tourism. Drawing on Dinnie's (2015) nation branding framework, several key strategies have been implemented: nation-brand advertising through a global marketing agency (Juicebox), the establishment of a dedicated public relations institution (Indonesian Health Tourism Board), and robust online branding via digital platforms and social media. Internal brand management is carried out by key state-owned enterprises (BUMN), notably PT HIN and IHC, which are actively building infrastructure and partnerships such as the Bali International Hospital and Mayo Clinic. The naming of the SEZ and its designation as a "World Class Medical & Wellness Destination" also plays a strategic role in image-building. Through the integration of high-quality healthcare infrastructure, cultural heritage, and modern digital marketing strategies, the Indonesian government seeks to reshape international perceptions of Indonesia—not

merely as a leisure destination, but as a holistic health and recovery hub

The multi-actor involvement through a pentahelix model—government, academia, business, community, and media—illustrates a cross-sectoral approach to branding. The collaboration with international actors, such as Mayo Clinic, and the involvement of experienced marketing agencies such as Juicebox, reflect a growing sophistication in how Indonesia projects its national image. Equally important is the role of domestic actors, including state-owned enterprises (BUMN), academic institutions, and local communities, all of which are actively engaged in realizing the vision of Sanur SEZ as a "World Class Medical & Wellness Destination." The pentahelix collaboration model has provided a strong foundation for multi-stakeholder engagement, although its full potential is yet to be maximized, particularly in areas such as diaspora mobilization, nation-brand ambassadors, and performance evaluation.

Despite these promising developments, Indonesia's nation branding strategy through Sanur SEZ remains at an early stage and must evolve into a more comprehensive and coordinated effort. Some elements of Dinnie's nation branding framework, such as citizen relationship management, diaspora mobilization, and performance measurement, are not yet fully implemented, indicating the need for further strategic refinement. Nation branding, by its nature, is a long-term and multidimensional process that requires internal alignment, strategic communication, and consistent performance delivery. The case of Sanur SEZ demonstrates that branding success is not solely dependent on promotional campaigns, but also on the substance of what is being offered—credible healthcare services, a conducive healing environment, and a clear value proposition rooted in local identity. To compete with established health tourism destinations in the region, Indonesia must strengthen institutional coordination, invest in human resource capacity, and implement

integrated brand governance mechanisms. Ultimately, if effectively managed, Sanur SEZ has the potential to serve as a national flagship for health tourism and as a tangible representation of Indonesia's soft power, economic diplomacy, and commitment to sustainable development.

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