

UDC 332

MAIN FACTORS AND ANALYSIS OF WELLNESS DEVELOPMENT STRATEGIES FOR THE DEVELOPMENT OF WELLNESS TOURISM DESTINATIONS IN BALI

Rahyuda Irma*, Suryawardani I Gusti Ayu Oka, Paturusi Syamsul Alam,
Wiranatha A.A.P. Agung Suryawan

Faculty of Tourism, University of Udayana, Bali, Indonesia

*E-mail: irma.rahayuda@gmail.com

ABSTRACT

Wellness tourism in Indonesia is a new concept and its development is focused on seeking spa activities for international tourists, especially in Bali. Determining the main factors and strategies in the development of wellness tourism is important to do. This study aims to determine the main factors and analysis of the right strategy in the development of Wellness Tourism destinations in Bali. This research method is designed as a qualitative research with the support of quantitative data. This research was conducted in Bali tourism areas which are located in all districts/cities in Bali which are narrowed down to Badung district, Denpasar city and Gianyar district. This research uses expert and observation. Strategy analysis in this study uses SWOT and AHP analysis. The results of this study are the driving factors that affect wellness tourism in Bali are 90% relaxation factors and the pull factors for wellness tourism in Bali are 70% Heritage and culture factors (cultural heritage and customs). In terms of strengths, weaknesses, opportunities, and threats, wellness tourism in Bali is almost the same as that experienced by other country competitors in Asia Pacific.

KEY WORDS

Strategy, Wellness, SWOT, AHP.

Wellness tourism can be defined as travel to maintain health to various unique and distinctive places in accordance with the related places and locations of their respective regions (GSS, 2011).

The Global Wellness Institute (GWI, 2017) has carried out economic monitoring of the spa and wellness industry. The economic benefits of global wellness tourism activities in 2014 included ten sectors related to the wellness/wellness tourism industry, namely: (1) wellness tourism; (2) spa industry; (3) wellness lifestyle real estate; (4) hot springs (thermal/mineral spring); (5) workplace wellness; (6) beauty and anti-aging; (7) healthy eating, nutrition and weight loss (healthy eating, nutrition and weight loss); (8) fitness of mind and body; (9) preventive and personalised medicine and public health; (10) alternative medicine.

The Global Wellness Institute (GWI, 2014) defines the health economy as an industry, which includes industries that enable consumers to incorporate health and lifestyle activities into their daily lives. Activities in the wellness tourism industry are estimated to have contributed to economic benefits of \$3.7 trillion in 2015 (Global Wellness Institute, 2015). It has been predicted by WHO that the healthcare industry will grow rapidly in 2022 and will continue to be the largest sector globally along with the establishment of an unbeatable consumer power (Voight and Pforr, 2014).

The growth of wellness activities that have an impact on the global economy is divided into five wellness activity sectors as follows: (1) spa; (2) wellness tourism; (3) bathing activities (thermal/mineral spring); (4) workforce empowerment (workplace wellness market); and (5) wellness life style by real estate (Global Wellness Institute, 2017).

Bali actually has known wellness activities in the eighth century AD, as can be seen from activities related to the daily life rituals of Hindus, namely the culture of bathing / lightning (purification) in the religion of Hindus in Bali (Capellini, 2010). Some of the lightning that can still be found today and are still used by the community and become a tourist attraction are the Sanih Temple and Lightning, Kusuma Park, Lingga Pawirta Petirtan located

in Buleleng; the Angsoka Lightning Station in Karangasem, Tirta Empul, Telaga Waja and Sebatu districts in Gianyar Regency; Beji Waringin Pitu in Badung Regency and Pancoran Solas in Bangli Regency.

The potential for growth and benefits of the spa business will trigger a special attraction for tourists, increasingly quality services will affect modern consumers to become more aware of their health. Regarding the availability of human resources in the fields of spa and wellness tourism, Minister of Tourism Arief Yahya (2019) said, the last two years had carried out competency certification which was attended by 11,000 participants in these fields (badungkab.go.id, 2019).

Image spa Bali has contributed to the world's spa industry thus establishing Bali as the host for the 2011 Global Spa Summit in mid-May 2011 at Westin Nusa Dua Bali (Pramono, 2013). Spa activities are a core component of wellness tourism where 41 percent of spas contribute to the wellness tourism market, while activities outside the spa are related to wellness tourism, namely bathing in springs/baths/springs, fitness/fitness activities, yoga retreats or lifestyle, Travel to protected nature accounts for 59 percent of the wellness tourism market (Global Spa and Wellness Summit, 2013). Rahyuda (2013) states that the development of spas in Bali is very rapid. The types of spas that have developed in South Badung in particular are classified into five types of spas, namely; (1) spa hotels/resorts; (2) day spas; (3) spa salons; (4) spa restaurants; and (5) spa retreat.

Tourism is very vulnerable to global issues. Not including the issue of worsening tourism traffic to Bali and even Indonesia. The global outbreak of the corona virus from China is a negative issue that cannot be avoided by tourism businesses in the world. The development of the virus, without integrated government policies, will become a major epidemic, perhaps bigger than the Bali bombing incident. The devastating virus attack had an impact on the losses suffered by Bali tourism. The potential loss from the impact of the Corona Virus on the tourism sector is estimated to be very large. CNBC Indonesia (2020) stated that the losses experienced by Bali tourism alone could potentially reach 2.7 trillion rupiah. Chairman of the Indonesian Hotel and Restaurant Association (PHRI) Haryadi Sukamdani in January-February 2020, was the peak period of Chinese tourist visits to Bali. The average visit of Chinese tourists to Bali reaches 3,000 tourists per day. It is estimated that in 60 days there will be 180,000 Chinese tourists to Bali. If each person spends US\$1,100 while in Bali, the potential spending of tourists from China to Bali will be lost by US\$200 million in two months (cnbcindonesia.com, 2020). So, this phenomenon can prove the existence of tourism development which has many challenges and where there are challenges, there will also be opportunities. If the situation is uncertain as it is today, the market structure is unpredictable and cannot be strategically relevant in the next two to three years. To support the sustainability of tourism in Bali, a long-term strategy is needed that is expected to play a role in winning the competition in the future.

Based on the issue of changes in the development of tourism in Bali and the declining contribution of the wellness tourism market in the world, nationally and globally, to generate tourism businesses, especially the provision and services of health and wellness in Bali, an integrated and sustainable wellness tourism development strategy is needed. In order to build and maintain the continuity of the tourism business in Bali, strategic planning skills are needed as a short-term, medium-term, and long-term deterrent for efforts to save the tourism business in Bali. Strategic, comprehensive, and integrated management capabilities are needed for internal elements with external elements of Bali tourism. Strategic design efforts are needed to formulate various determinants that influence tourism development, in addition to requiring support from the government in Bali policy making. These factors are none other than internal strengths and weaknesses as well as challenges and opportunities as external factors for Bali tourism.

In line with the previously described trend which is more directed towards the role of the government and promoting local culture in terms of wellness tourism, the Global Wellness Tourism Economic (2018 - 2020) describes the development of wellness tourism in Asia Pacific countries which is divided into three aspects, namely (1) the use of digital media in the means of promoting wellness tourism, (2) a national strategy in the development of

wellness tourism and (3) national targets to be achieved through the development of wellness tourism. Based on these three aspects, Indonesia is still not optimal in the development of wellness tourism because Indonesia has only been recorded to have had programs that functioned to promote wellness tourism both locally and internationally, but does not have a national strategy and there are no national targets to be achieved from the promotion of wellness tourism. This can have a negative impact on wellness tourism in Indonesia in accordance with the latest developments at this time because there is still no clarity regarding the strategies used and the targets to be achieved.

The lack of strategies and targets to be achieved is the cause of the not yet maximal development of wellness tourism in Indonesia. In addition to these factors, the Global Wellness Institute (2018) describes the distribution of world wellness destinations that are unique in the Asia Pacific region, but Indonesia and especially in Bali are not included in the list of countries or regions that have distinctive or unique wellness destinations. With countries that already have characteristics for their wellness destinations, for example India with yoga destinations, Europe with its unique spas and natural baths. Thus, the uniqueness factor and the characteristics of the destination should also be taken into consideration in determining the strategy and national achievement targets for the development of wellness tourism.

In contrast to the previous explanation, in terms of research conducted by the Global Wellness Economy Monitor (2018) and as a data reference for 2020, it presents data on 25 countries with the highest market growth (growth market tourism trips) in the field of wellness tourism. In this report, Indonesia has an average growth in the economic impact of wellness tourism, touching 21.5% per year. During 2018 to mid-2019, this indicates that Indonesia's wellness tourism market share is quite attractive to world tourists. In addition, this also indicates that Indonesian wellness tourism has great potential to attract more tourists back to enjoy Indonesian wellness facilities and products. However, this significant increase decreased in the final quarter due to the spread of the Covid-19 virus and until the end of 2020 the percentage of market growth continued to decline in line with the worsening global situation due to the new variant of the Covid-19 virus. In 2021, this percentage of growth has not increased due to the spread of Covid-19 cases.

Thus, based on the issue of the gap in the redevelopment of tourism potential in Bali, such as efforts to improve Indonesia's position as a wellness tourism destination, as a branding, increasing its human resources, especially competence in the spa sector and making the wellness tourism business increasingly an opportunity, a wellness tourism destination development strategy is needed. In Bali as a solution to overcome the dilemma of the tourism market potential and market uncertainty due to the outbreak of Covid-19. Thus the strategy of developing wellness tourism in Bali becomes very important to be researched.

METHODS OF RESEARCH

This research method is designed as a qualitative research with the support of quantitative data. This research was conducted in Bali tourism areas which are located in all districts/cities in Bali which are narrowed down to Badung district, Denpasar city and Gianyar district. This research uses expert and observation.

RESULTS AND DISCUSSION

The main factors influencing Wellness Tourism in Bali

To find out the factors that influence wellness tourism destinations in Bali, it can be related to the Push-pull theory (Bansal et al., 2005). This theory is part of the migration modeling which consists of push and pull factors, Moon (1995) in Bansal et al. (2005), described the driving factors as factors that motivate customers to switch from the old service provider which is assumed to have a negative influence on the quality of life indicators. Related to this theory, some experts describe more specifically the push and pull factors, especially those related to wellness as follows:

1. Escape; Hsu and Huang as quoted by Kim, Chiang and Tang (2016), state that escape is an aesthetic aspect of motivation to travel. Escape from daily routines or escape can be done by visiting tourist destinations where tourists can restore balance and harmony (Genç, 2012).
2. Novelty and knowledge-seeking; Petrick as quoted by Kim, Chiang and Tang (2016), describes novelty as the tendency of tourists to visit destinations that provide unique and new experiences, while knowledge-seeking is the desire to seek and absorb new information.
3. Prestige; describes the socio-psychological circumstances that encourage a person to travel (Dann in Kim, Chiang & Tang, 2016). Prestige refers not only to products and services that offer excellence, superior quality, and high prices, but also a way to achieve happiness, personal esteem, and emotional benefits (Park & Reisinger, 2009).
4. Enhancing mental well-being; Enhancing mental well-being can be achieved by doing activities that give you feelings of happiness and gratitude, releasing stress from a busy life, relaxing, trying to be more flexible in body and mind and getting a sense of balance in life (Lehto, Brown, Chen & Morrison in Konu). & Laukkanen, 2010).
5. Enhancing physical conditions; Lehto et al. as quoted by Konu and Laukkanen (2010), states that enhancing physical condition can be done with physical exercise (exercise) which aims to strengthen muscles, tighten the body and avoid over-eating behavior.
6. Relaxation; In traveling, tourists want to feel relaxed and restore balance and harmony of body, mind, and spirit (Kim, Chiang & Tang, 2016). Relaxation is a feeling of being free to act as you feel, doing nothing and getting a change of atmosphere from busy work (Villamediana-Pedrosa, Vila-López & Küster-Boluda, 2020).
7. Self-actualization; In the context of tourism, self-actualization is defined as the desire of tourists to achieve personal growth that can strengthen self-confidence and increase the identity of tourists. (Kim, Chiang & Tang, 2016).

The pull factors that influence wellness tourism are as follows:

1. Heritage and culture McGehee, Murphy, and Uysal as quoted by Kassean and Gassita (2013) define heritage and culture as cultural heritage and diversity owned by one particular place or destination, which includes historical sites, local festivals, local handicrafts, typical animals, museums, galleries, and so on.
2. Climate and weather In the context of tourism, Villamediana-Pedrosa, Vila-López, and Küster-Boluda (2020) define climate and weather as conditions that exist or are owned by a destination that can support activities.
3. Recreational activities; Villamediana-Pedrosa, Vila-López and Küster-Boluda (2020) and Konu and Laukkanen (2010) state recreational activities as a collection of activities in which people of every age group can participate passively or actively according to their interests and creativity, such as: nightlife activities, shopping, casino, tennis, outdoor activities, and so on.
4. Accommodation and service Prayag, as quoted by Villamediana Pedrosa, Vila-López and Küster-Boluda (2020), states that varied and quality accommodation is a significant predictor of tourist motivation to travel. The Italian National Agency for the Protection of the Environment and for Technical Services (APAT) defines accommodation and service as an agency that provides a place for tourists to stay while doing tourism activities which are generally available in the form of homestays, hotels, resorts, and so on, which also includes services available and offered by the accommodation.
5. Easy access Buhalis, as quoted by Konu and Laukkanen (2010), defines easy access as a condition in which a tourist destination, products, and services offered by a destination can be easily accessed by all tourists (which also includes the convenience of the transportation system for visiting a destination, which consists of vehicles, routes, terminals, airports, and so on). Darcy and Dickson (2009) also state that easy access is a condition where all tourists can enjoy traveling activities at a

destination to the fullest regardless of physical limitations and age.

Furthermore, based on the study of the theory, the findings of push and pull factors that affect wellness tourism in Bali obtained data through questionnaires given to experts as follows:

Table 1 – Driving Factors for Wellness Tourism in Bali

No	Driving Factor	Percentage of respondents
1	Relaxation	70%
2	Enhancing Mental Well-Being	20%
3	Novelty & knowledge – seeking	10%

Source: *Expert Questionnaire data processing.*

Based on the data above, it can be seen that the most influential driving factor for Wellness tourism in Bali is Relaxation with an achievement of 70%. Mental health factors (enhancing Mental Well-Being) and Novelty & knowledge – seeking new knowledge are not too significant, namely 20% and 10% of the total respondents. Based on these results, it can be seen that the dominant factor as a driving factor is relaxation, this can be interpreted that wellness tourism in Bali is still dominated by secondary travelers. This is also supported by the results of interviews conducted with wellness practitioners in Bali (Made Gunarta, Revivo, Bali Hyatt Sanur Spa and Five Elements) which stated that tourist visits have the aim of getting new experiences, especially in terms of yoga and spas. Based on the results of the questionnaire regarding the pull factor, the following data were obtained:

Table 2 – Pull Factors for Wellness Tourism in Bali

No	Pull Factor	Percentage of respondents
1	Heritage and culture	90%
2	Recreational activities	10%

Source: *Expert Questionnaire data processing.*

Based on the preceding table, 90% of respondents have the same opinion regarding the pull factors for wellness tourism in Bali, namely the existence of Heritage and culture. This indicates that based on the respondent's understanding, culture and customs are the main factors that can attract tourist visits to enjoy wellness as a destination in Bali. However, based on the results obtained in the driving factor, this becomes a contradiction where tourists who come to Bali only want to get relaxation but are interested in the culture and customs that are the soul of wellness tourism in Bali. This finding is an interesting thing to be redeveloped that wellness tourism in Bali should get more development by bringing out local wisdom and culture which is the root and soul of Bali tourism so that it has a characteristic that is not owned by other regions.

Based on the explanation above, it can be concluded that the factors that influence the development of wellness tourism in Bali are the driving factor in the form of the goal of obtaining relaxation, the pulling factor in the form of local wisdom and noble Balinese culture and the current world wellness trend. The destination factor for obtaining relaxation reflects a sense of comfort and fairly standardized facilities owned by Bali so that international tourists entrust their wellness activities in Bali, especially with the local wisdom factor and noble culture that cannot be found in other areas in the world. As well as the current global wellness trend, which suggests the use of local natural resources and the use of local culture as a concept for developing modern wellness.

Strategy Analysis for developing wellness tourism destinations in Bali SWOT analysis

Internal factor analysis which includes indicators of strength and weakness aims to determine the state of Bali's internal environmental factors as a wellness destination. The indicators of strength that Bali has can be used as a reference for development and improvement in covering the weaknesses contained in the context of the implementation of wellness tourism in Bali. Referring to the results of depth interviews with nine informants,

observations to literature studies, twelve internal factors were obtained in relation to the development of wellness tourism in Bali as follows:

Table 3 – External Factor Evaluation (EFE) Matrix Wellness Tourism Bali

No.	Strength	Average Weight	Average Rating	Total score
1	Bali as a wellness destination has a uniqueness treatment	0,09	3,2	0,288
2	Bali has a world wellness tourism branding.	0,092	3,4	0,31
3	Local products related to wellness, including <i>boreh</i> and <i>Lulur</i> , are in demand by the international market.	0,101	3,7	0,37
4	Bali has generic based and authentic base wellness products.	0,101	3,7	0,37
5	Wellness tourism in Bali has a spirit to grow meaning of life	0,098	3,6	0,35
6	Wellness tourism in Bali is built through traditional practices rooted in local culture.	0,095	3,5	0,33
7	The hospitality of the local Balinese people.	0,107	4	0,428
	Weakness			
1	Lack of interest in inventory in the form of authentic wellness products.	0,062	2,3	0,14
2	Discrimination of tourist services by local spa workers.	0,062	2,3	0,14
3	The potential for authentic wellness products and treatments owned by Bali has not been supported by adequate managerial support.	0,059	2,2	0,13
4	Human resources in supporting the sustainability of wellness tourism are not sufficient.	0,065	2,4	0,15
5	The negative paradigm of society towards the local spa profession.	0,068	2,5	0,17
	Total	1		3,176

External factor analysis which includes opportunities and threats aims to identify existing opportunities so as to minimise threats that come to Bali as a wellness tourism destination. Referring to the results of in-depth interviews with nine informants, observations and literature studies, fourteen external factors were obtained in relation to the development of wellness tourism in Bali as follows:

Table 4 – External Factor Evaluation (EFE) Matrix Wellness Tourism Bali

No.	Opportunity	Average Weight	Average Rating	Total score
1	The high demand in the international labor market for human resources in the field of wellness (spa therapist)	0,088	3,5	0,308
2	The existence of Holistic wellness advances that Bali has had since the release of the film "Eat-Pray-Love" has attracted European tourists.	0,08	3,2	0,256
3	The Bali Spa Wellness Association establishes international partnerships in supporting the empowerment of human resources related to professional standardisation.	0,09	3,6	0,324
4	The Asian region has the potential to be able to drive the global fitness tourism market (Global Wellness Tourism).	0,09	3,6	0,324
5	Take advantage of the movement of the domestic tourist market in the era of the Covid-19 pandemic.	0,081	3,3	0,267
6	The market spectrum of wellness tourism in Bali has developed.	0,081	3,3	0,267
7	The government provides involvement in wellness activities, especially the preparation of workers.	0,081	3,3	0,267
8	Local product packaging related to wellness by utilising international standardised technology.	0,08	3,2	0,256
	Threat			
1	There is a Covid-19 pandemic.	0,031	1,2	0,037
2	Wellness tourism in Bali is developing as a side market, not a sustainable market.	0,049	2	0,098

3	International market demand related to generic wellness products covers the visualisation of unique products and local Balinese culture (purification and ancestor code).	0,065	2,6	0,169
4	Lack of interpretation and formulation of the essence of Balinese Wellness as an offer and acculturation of the International Wellness Concept.	0068	2,7	0184
5	Asia-Pacific countries (Malaysia, Laos, Philippines) have developed a special strategy to make wellness tourism their national investment target.	0,065	2,6	0,169
6	More advanced resource management and technology related to wellness tourism have been offered by a competing country (South Korea) to tourists during the pandemic.	0,051	2,1	0,107
Total		1		3,033

Source: Researcher Analysis Results (2021).

The data in Table 4 shows that the weighting and assessment of the indicators of opportunities and threats of wellness tourism in Bali varies. The opportunity indicators obtained are related to destination resources variables as well as dimensions that are divided into economics, politics and technology.

Grand strategy is used to find out the right strategy in relation to the development of wellness tourism in Bali. Internal factor evaluation (IFE) and external factor evaluation (EFE) are the basis for knowing the right strategy. The formation of this matrix aims to determine the position or condition of Bali as a wellness tourist destination in terms of competitors and market growth which is divided into four quadrants as follows.

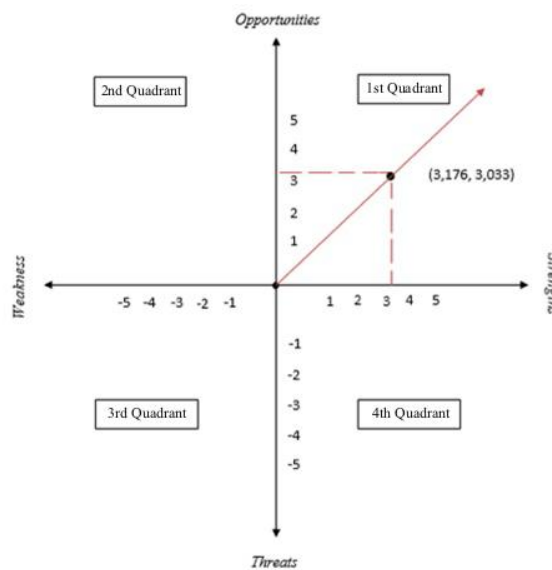


Figure 1 – Coordinate Matrix (Source: Researcher Analysis Results, 2021)

Based on the coordinate matrix image above, Bali's position as a wellness tourist destination is in quadrant I. By adjusting the internal factor evaluation score of 3,176 (x) and the evaluation of external factors of 3,033 (y). The reference strategies that can be used by Bali in the development of wellness tourism include (1) Market Development; (2) Market Penetration; (3) Product Development; (4) Horizontal, forward, backward integration and related diversification. After knowing the position of Bali as a wellness tourist destination, the next step is the preparation of the SWOT Matrix in determining the alternative strategies used. Furthermore, the SWOT matrix analysis provides information on the strategy for developing wellness tourism in Bali by referring to the identification of internal and external factors. After the identification of external internal factors that have been carried out, seventeen alternative strategies are obtained to strengthen the main strategy which refers to backward, forward or horizontal integration, market penetration, market development and product development (David and David, 2017) which are shown in table 6 below:

Table 6 – SWOT Matrix for Wellness Tourism Development in Bali

<p style="text-align: center;">IFE</p> <p>EFE</p>	<p>Strength Bali as a wellness destination has a uniqueness treatment. Bali has a world wellness tourism branding. Local products related to wellness, including boreh and scrubs, are in demand by the international market. Bali has a generic based and authentic base wellness product. Wellness tourism in Bali has a spirit to grow meaning of life (understanding the energy of love to build harmonious relationships). Wellness tourism in Bali is built through traditional practices rooted in local culture. The hospitality of the local Balinese people.</p>	<p>Weakness 1. Lack of interest in inventory in the form of authentic wellness products. 2. Discrimination of tourist services by local spa workers. 3. The potential for authentic wellness products and treatments owned by Bali has not been supported by adequate managerial support. 4. The community's negative paradigm towards the local spa profession.</p>
<p>Opportunity 1. High demand in the international labor market for human resources in the field of wellness (spa therapist) 2. The Holistic wellness advance that Bali has had since the release of the film "Eat-Pray-Love" has attracted European tourists. 3. The Bali Spa Wellness Association establishes international partnerships in supporting the empowerment of human resources related to professional standardization. 4. The Asian region has the potential to drive the global fitness tourism market (Global Wellness Tourism). 5. Take advantage of the movement of the domestic tourist market in the era of the Covid-19 pandemic. 6. The market spectrum of wellness tourism in Bali has developed. 7. The government provides involvement in wellness activities, especially the preparation of workers. 8. Packaging of local products related to wellness by utilizing international standardized technology.</p>	<p>Strength-Opportunity 1. Development of holistic wellness advance products and services to the fullest by utilizing natural resources in priority locations. (S1, S4, S7, O1, O3) 2. Strengthening the identity of the form of wellness in Bali. (S3,S5,S6,O2,O4) 3. Strengthening the branding of world wellness tourism for the form of wellness in Bali internationally. (S2, S7, O3, O7, O8) 4. Strengthening wellness services in Bali in the form and basis of local culture. (S1, S6, S7, O3, O4) 5. Strengthening the tourist target market. (S3, S4, O2, O4, O5) 6. Creating strict and binding policies related to human resources, wellness tourism products and services (S2, S6, O6, O7).</p>	<p>Weakness-Opportunity 1. Maximizing inventory to develop the wellness tourism spectrum in Bali. (W1, W3, O6, O7) 2. Increase the quality of human resources in wellness tourism services. (W4, W5, O1, O3) 3. Adding cooperation (Co-Operation) to companies supporting HR performance. (W1, W3, O3, O7) 4. Encouraging the creation of unique herbal products in each district in Bali. (W3, W4, O3, O7, O8)</p>
<p>Threats 1. There is a Covid-19 pandemic. 2. Wellness tourism in Bali is developing as a side market, not a sustainable market. 3. International market demand related to wellness tourism covers the visualization of unique products and local Balinese culture (purification and ancestor code). 4. Lack of interpretation and formulation of the essence of Balinese Wellness as an offer and acculturation of the International Wellness Concept. 5. Asia-Pacific countries (Malaysa, Laos, Philippines) have developed a special strategy to make wellness tourism their national investment target. 6. More advanced resource management and technology related to wellness tourism have been offered by competing countries (South Korea) to tourists during the pandemic.</p>	<p>Strength-Threat 1. There is a Covid-19 pandemic. 2. Wellness tourism in Bali is developing as a side market, not a sustainable market. 3. International market demand related to wellness tourism covers the visualization of unique products and local Balinese culture (purification and ancestor code). 4. Lack of interpretation and formulation of the essence of Balinese Wellness as an offer and acculturation of the International Wellness Concept. 5. Asia-Pacific countries (Malaysia, Laos, Philippines) have developed a special strategy to make wellness tourism their national investment target. 6. More advanced resource management and technology related to wellness tourism have been offered by competing countries (South Korea) to tourists during the pandemic.</p>	<p>Weakness-Threat 1. Expanding local Balinese yoga studios / Bali Usadha to empower human resources and introduce them to tourists. (W1, W3, T3, T4) 2. Provide quality assurance of production and standardization of services related to wellness tourism. (W3, T5, T6)</p>

Source: Researcher Analysis Results (2021).

Based on table 6, there are several alternative strategies that can be implemented in the context of developing wellness tourism in Bali. The SO (strengths-opportunities) strategy resulted in six alternative strategies with a combined score of 4.725, followed by five alternative strategies of ST (strengths-threats) with a combined score of 3.22. In addition, there are also four alternative WO (weakness-opportunities) strategies with a combined score of 3.0 and two alternative WT (weakness-threats) strategies with a combined score of 1.494. It is known that the SO (strengths-opportunities) strategy was chosen as an alternative strategy by having the largest combined score and producing six alternative strategies. This means that the strategies used include strategies that use internal strengths by taking advantage of external opportunities. In addition, alternative strategies resulting from the SO (strengths-opportunities) strategy support the main strategy which refers to backward, forward or horizontal integration, market penetration, market development and product development (David and David, 2017) including:

1. Development of holistic wellness advance products and services to the fullest by utilizing natural resources in priority locations.
2. Strengthening the identity of the form of wellness in Bali.
3. Strengthening the branding of world wellness tourism for the form of wellness in Bali internationally.
4. Strengthening wellness services in Bali in the form and basis of local culture.
5. Strengthening the tourist target market.
6. Creating strict and binding policies related to human resources, wellness tourism products and services.

Analytical Hierarchy Process in Determining Strategic Alternative Priorities

The AHP (Analytical Hierarchy Process) analysis in this study was carried out based on 6 criteria consisting of (i) Cost Advantage, (ii) Focus, (iii) Differentiation, (iv) Risk, (v) Urgency and (vi) Human Resources. The Analytical Hierarchy Process stage starts from a stage called decomposition. This stage is a breakdown of the problem into a hierarchical process in assessing and making decisions related to the priority strategies for developing wellness tourism in Bali. Decision making in choosing an alternative strategy to determining strategic priorities is carried out with informants who are experts in wellness tourism. Each structure in the hierarchical process is related to one another (saaty, 2003). The hierarchical structure in this study is described as follows.

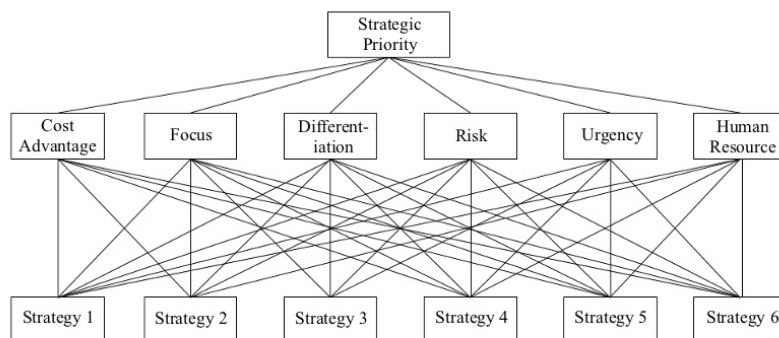


Figure 2 – Hierarchical Structure (Source: Researcher Analysis Results, 2021)

Priority Criteria To Be Considered In Determining Strategy

The next stage is the pairwise comparison stage. At this stage, a pairwise comparison is carried out by the experts/informants using a questionnaire as an instrument in collecting weighted value data. The stages of the Analytical Hierarchy Process are described in the following discussion.

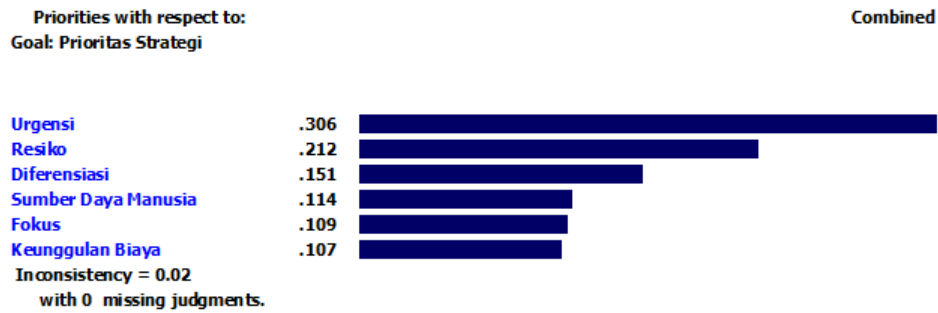


Figure 3 – Pairwise Comparison Criteria. Source: Data Analysis Results (2021)

Based on Figure 3, the eigenvector value or the order of priority criteria for the research objective, namely determining the wellness tourism strategy in Bali, the main criteria priority obtained with the highest eigenvector value is the urgency criterion of 0.306, then followed by the risk criteria of 0.212, differentiation of 0.151, human resources of 0.114, focus of 0.109 and cost advantage criteria of 0.107. Consistency Ratio value on the weighting criteria is 0.02. This value states that the level of consistency of the results of pairwise comparisons between criteria is acceptable and considered consistent because it has met the requirements of the Consistency Ratio value, which is less than or equal to 0.1 (saaty, 1993). This shows that the urgency criterion is the main priority criterion in determining the strategy that can be implemented. The urgency criteria referred to in this study are strategies that have urgency in carrying out an action and decision, so that the strategy has priority compared to other strategies (Vargas, 2010). Stakeholders are of the opinion that urgency is a criterion as the main consideration because it is based on their understanding of the condition of wellness tourism in Bali which is currently sinking, so that wellness tourism in Bali requires a strategy that can be implemented immediately.

Strategic Priority of Each Criterion

a. Strategic Priority Judging from the Cost Advantage Criteria.

The pairwise comparison matrix based on the importance of the cost advantage criteria in alternative strategies consisting of strategy 1, strategy 2, strategy 3, strategy 4, strategy 5 and strategy 6 is described in Figure 4.16 as follows:

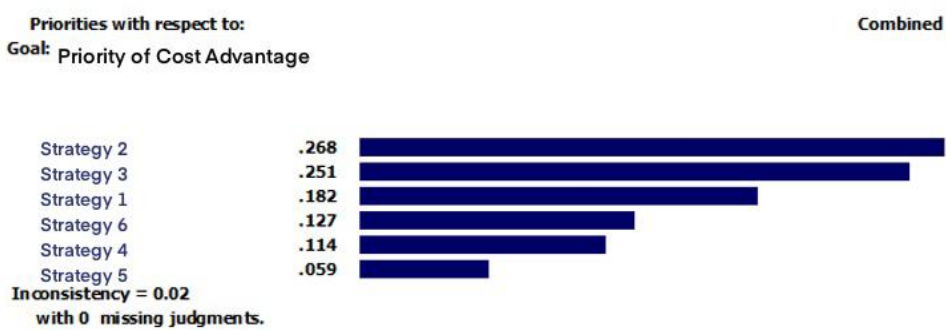


Figure 4 – Priority of Cost Advantage Criteria. Source: Data Analysis Results (2021)

The results of the analysis of the calculation of the pairwise comparison matrix in Figure 3.5, obtained a sequence of strategies on the criteria of cost advantage, namely strategy 2 with the highest total weight of 0.268 or 26.8%. Then followed by strategy 3 in the second place with a total weight of 0.251 or 25.1%. In third place is strategy 1 with a total weight of 0.182 or 18.2%. The fourth order places strategy 6 with a total weight of 0.127 or 12.7%. The fifth place places strategy 4 with a total weight of 0.114 or 11.4% and in the last order places strategy 5 with a total weight of 0.59 or 5.9%. Consistency ratio value on the

weighting of alternative strategies to the differentiation criteria is 0.02. The value of the weighted alternative strategy with the criteria of cost advantage states that the cost advantage ratio from the comparison results above has a value of 2%. So that the above assessment is acceptable and considered consistent because it has met the requirements for the consistency ratio value, which is less than or equal to 0.1 (saaty, 1993).

b. Strategic Priority Judging from the Focus Criteria.

The pairwise comparison matrix based on the importance of the focus criteria on alternative strategies consisting of strategy 1, strategy 2, strategy 3, strategy 4, strategy 5 and strategy 6 is described in Figure 4.17 as follows:

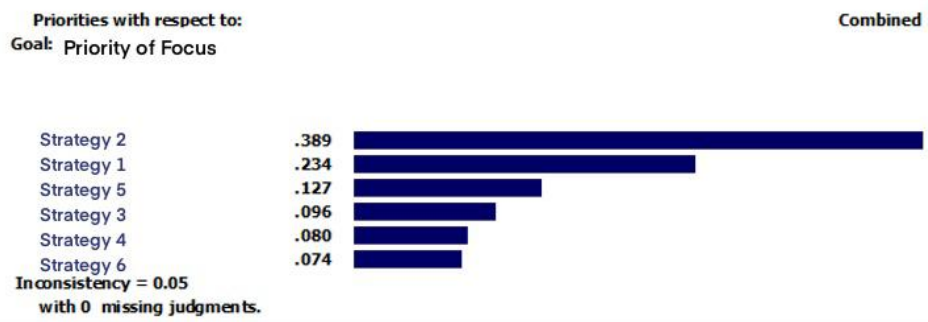


Figure 5 – Priority of Focus Criteria. Source: Data Analysis Results (2021)

The results of the analysis of the calculation of the pairwise comparison matrix in Figure 3.6, obtained a sequence of strategies on the focus criteria, namely strategy 2 with the highest total weight of 0.389 or 38.9%. Then followed by strategy 1 in second place with a total weight of 0.234 or 23.4%. In the third place there is strategy 5 with a total weight of 0.127 or 12.7%. The fourth order places strategy 3 with a total weight of 0.96 or 9.6%. The fifth place places strategy 4 with a total weight of 0.080 or 8% and in the last order places strategy 6 with a total weight of 0.74 or 7.4%. Consistency ratio value on the weighting of alternative strategies to the differentiation criteria is 0.05. The value of the weighted alternative strategy with the focus criteria states that the cost advantage ratio from the comparison results above has a value of 5%. So that the above assessment is acceptable and considered consistent because it has met the requirements for the consistency ratio value, which is less than or equal to 0.1 (saaty, 1993).

c. Strategic Priority Seen from Differentiation Criteria.

The pairwise comparison matrix based on the importance of the differentiation criteria in alternative strategies consisting of strategy 1, strategy 2, strategy 3, strategy 4, strategy 5 and strategy 6 is described in Figure 4.18 as follows.

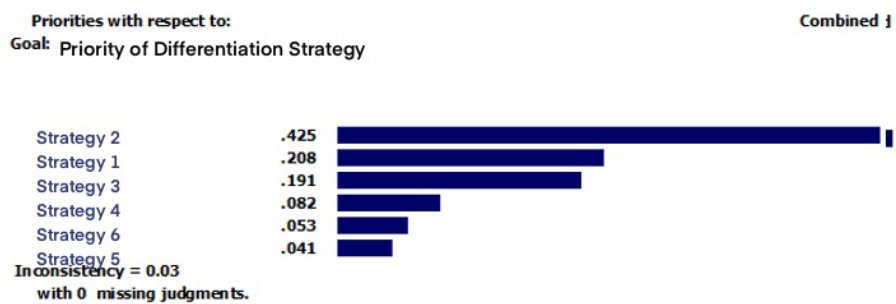


Figure 6 – Comparison of Differentiation Criteria. Source: Data Analysis Results (2021)

The results of the analysis of the calculation of the pairwise comparison matrix in Figure 3.7, obtained a sequence of strategies on the differentiation criteria, namely strategy 2

with the highest total weight of 0.425 or 42.5%. Then followed by strategy 1 in second place with a total weight of 0.208 or 20.8%. In third place there is strategy 3 with a total weight of 0.191 or 19.1%. The fourth order places strategy 4 with a total weight of 0.82 or 8.2%. The fifth place places strategy 6 with a total weight of 0.53 or 5.3% and in the last order places strategy 5 with a total weight of 0.41 or 4.1%. Consistency ratio value on the weighting of alternative strategies to the differentiation criteria is 0.03. The value of the weighted alternative strategy with the differentiation criteria states that the cost advantage ratio from the comparison results above has a value of 3%. So that the above assessment is acceptable and considered consistent because it has met the requirements for the consistency ratio value, which is less than or equal to 0.1 (saaty, 1993).

d. Strategic Priority Judging from the Risk Criteria.

The pairwise comparison matrix based on the importance of risk criteria in alternative strategies consisting of strategy 1, strategy 2, strategy 3, strategy 4, strategy 5 and strategy 6 is described in Figure 4.19 as follows.

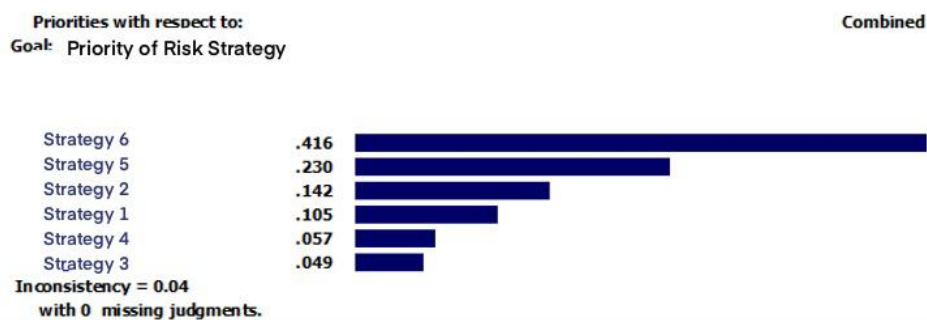


Figure 7 – Comparison of Risk Criteria. Source: Research Analysis Results (2021)

The results of the analysis of the calculation of the pairwise comparison matrix in Figure 4.19, obtained a sequence of strategies on the risk criteria, namely strategy 6 with the highest total weight of 0.416 or 41.6%. Then followed by strategy 5 in second place with a total weight of 0.230 or 23%. In the third place there is strategy 2 with a total weight of 0.142 or 14.2%. The fourth order places strategy 1 with a total weight of 0.105 or 10.5%. The fifth place places strategy 4 with a total weight of 0.57 or 5.7% and in the last order places strategy 3 with a total weight of 0.49 or 4.9%. Consistency ratio value on the weighting of alternative strategies to the differentiation criteria is 0.04. The value of the weighted alternative strategy with risk criteria states that the cost advantage ratio from the comparison results above has a value of 4%. So that the above assessment is acceptable and considered consistent because it has met the requirements for the consistency ratio value, which is less than or equal to 0.1 (saaty, 1993).

e. Strategy Priority Judging from the Urgency Criteria.

The pairwise comparison matrix based on the importance of the urgency criteria on alternative strategies consisting of strategy 1, strategy 2, strategy 3, strategy 4, strategy 5 and strategy 6 is described in Figure 4.20 as follows.

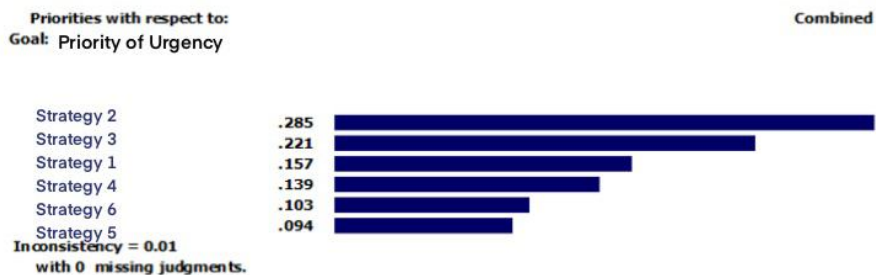


Figure 8 – Comparison of Urgency Criteria. Source: Research Analysis Results (2021)

The results of the analysis of the calculation of the pairwise comparison matrix in Figure 3.9, obtained a sequence of strategies on the urgency criteria, namely strategy 2 with the highest total weight of 0.285 or 28.5%. Then followed by strategy 3 in second place with a total weight of 0.221 or 22.1%. In third place is strategy 1 with a total weight of 0.157 or 15.7%. The fourth place places strategy 4 with a total weight of 0.139 or 13.9%. The fifth place places strategy 6 with a total weight of 0.103 or 10.3% and in the last order places strategy 5 with a total weight of 0.094 or 9.4%. Consistency ratio value on the weighting of alternative strategies to the differentiation criteria is 0.01. The value of the weighted alternative strategy with the urgency criteria states that the cost advantage ratio from the comparison results above has a value of 1%. So that the above assessment is acceptable and considered consistent because it has met the requirements for the consistency ratio value, which is less than or equal to 0.1 (saaty, 1993).

f. Strategic Priority Seen from Human Resources Criteria.

The pairwise comparison matrix based on the importance of human resource criteria on alternative strategies consisting of strategy 1, strategy 2, strategy 3, strategy 4, strategy 5 and strategy 6 is described in Figure 4.21 as follows.

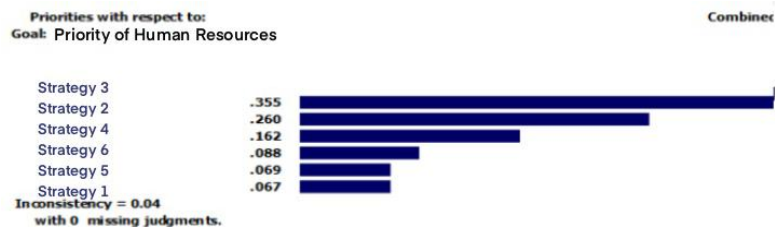


Figure 9 – Comparison of Human Resources Criteria. Source: Research Analysis Results (2021)

The results of the analysis of the calculation of the pairwise comparison matrix in Figure 3.10, obtained the sequence of strategies on the criteria of human resources, namely strategy 3 with the highest number of weights of 0.355 or 35.5%. Then followed by strategy 2 in the second place with a total weight of 0.260 or 26%. In the third place there is strategy 4 with a total weight of 0.162 or 16.2%. The fourth order places strategy 6 with a total weight of 0.088 or 8.8%. The fifth place places strategy 5 with a total weight of 0.069 or 6.9% and in the last order places strategy 5 with a total weight of 0.067 or 6.7%. Consistency ratio value on the weighting of alternative strategies to the differentiation criteria is 0.04. The value of the weighted alternative strategy with the criteria of human resources states that the cost advantage ratio from the comparison results above has a value of 4%. So that the above assessment is acceptable and considered consistent because it has met the requirements for the consistency ratio value, which is less than or equal to 0.1 (saaty, 1993).

Strategic Priority Determination Results

From all stages of the Analytic Hierarchy Process that have been carried out, the results obtained regarding the purpose of this research are, determining the priority of wellness tourism strategies in Bali based on strategy criteria according to several experts. The results of the Analytical Hierarchy Process are described in Figure 4.22 as follows.

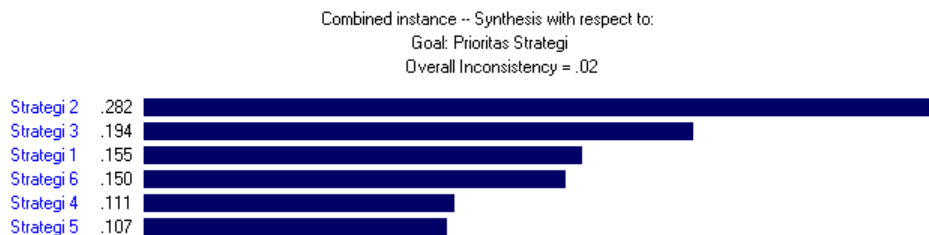


Figure 10 – Strategic Priority Results. Source: Data Analysis Results (2021)

Based on Figure X, the strategic priority with the highest eigenvector value is obtained, namely strategy 2 (Strengthening the identity of wellness forms in Bali) of 0.282, then Strategy 3 (Strengthening world wellness tourism branding against wellness forms in Bali internationally) of 0.194, Strategy 1 (Development of holistic wellness advance products and services maximally by utilizing natural resources in priority locations) of 0.155, Strategy 6 (Creating strict and binding policies related to human resources, wellness tourism products and services) of 0.150, strategy 4 (Strengthening wellness services in Bali in the form of and local culture base) of 0.111 and strategy 5 (Strengthening the tourist market target) of 0.107. Consistency Ratio value in pairwise comparisons as a whole is 0.02. This value states that the overall pairwise comparison assessment process that has been carried out is acceptable and considered consistent because it has met the requirements for the Consistency Ratio value, which is less than or equal to 0.1 (saaty, 1993).

The criteria that are considered the largest to the smallest are urgency criteria, risk criteria, differentiation criteria, human resource criteria, focus criteria, and cost advantage criteria. It can be concluded that the experts consider urgency as the main consideration among other criteria because at this time Bali has a wellness tourism condition that urgently needs the implementation of strategies as soon as possible, in terms of risk the strategy must have the lowest risk compared to other strategies so that the strategy can be implemented. become a separate differentiation for wellness tourism in Bali and financing is not the main factor in determining a strategy.

Strategy 2, namely the strategy of strengthening the identity of the form of wellness in Bali is a strategy that is considered to have the highest urgency compared to other strategies. This is based on the results of observations and interviews of researchers with experts regarding the current condition of wellness tourism in Bali, which is in the stage of growing and developing. In terms of the context of the growth and development of wellness tourism in Bali, the movement is quite significant, namely becoming the top 25 best destinations in the Asia Pacific region (GWI, 2018). wellness destinations that have it. In other words, it can be seen that Bali does not yet have a strong identity so that the development of wellness that occurs is only in the form of imitating or referring to other standards, not the local wisdom of Balinese culture. In addition, the strategy of strengthening the identity of the form of wellness in Bali has the lowest risk compared to other strategies, this is because . The strategy of strengthening the identity of the form of wellness in Bali can also be a distinctive feature for wellness tourism in Bali so that it becomes a differentiator between Bali and other destinations. This is indicated by the value of respect for the environment (Palemahan) which is embodied in the existence of Sad Kerthi (Bali Regulation No. 5 2020), namely respect for natural resources such as seas, lakes, mountains, forests and water resources; respect for fellow human beings, namely the concept of salung sayabantaka (mutual cooperation), mutual honing, compassion and care; and respect for God Almighty (Parahyangan) by prioritizing the value of spirituality in every activity carried out.

The strategy of strengthening the identity of the form of wellness in Bali referred to in this case is to raise Balinese cultural values and apply them not only to the physical development of wellness tourism but more deeply in terms of wellness services and products. Raising the noble values of Tri Hita Karana in wellness tourism management, applying mutual honing, compassion and care in providing wellness services and increasing the ability to present the meaning contained in each wellness activity and destination aimed at providing correct knowledge according to the noble concept of Balinese culture . This strategy can be implemented by:

1. Market penetration in the form of controlling and adjusting market demand, sales and market response through brand management, pricing, packaging and promotion (Hooley, Saunders, and Piercy, 2012). In this case, identity enhancement is applied in controlling the market, which so far has been more focused on wellness which is limited to spas and gyms, has turned into a holistic wellness advance package, brand management, emphasis and promotion. Of course, by considering marketing strategies (Ihalauw, 2017) namely customer retention (customer retention), sales to

existing customers (sales to existing customers), use innovation (Use Innovation), increasing existing market share (Increasing of the existing market), Upstream Marketing and the marketing mix;

2. Product development, namely diversifying holistic wellness advance products, namely products developed in the wellness tourism business which are comprehensive products, not only products on the physical dimension approach but also all dimensions of wellness. As stated by Meikassandra (2020) Bali has become a fitness tourism destination with Ubud as the main destination that has applied holistic wellness advances in the form of holistic wellness advance products and services, which are wellness products consisting of body, mind and spirit. In addition, various fitness resorts and retreats can be developed in Denpasar and Badung by offering a wide selection of products related to cultural, natural and spiritual tourism attractions related to fitness. Furthermore, this strategy involves all stakeholders of wellness tourism in Bali consisting of the central and regional governments of Bali Province as policy holders and regional regulatory authorities, medical providers who play a role in providing information on services and authentic Balinese wellness products, tourism business actors who will later act as strategic movers. This is in the field and the Balinese in general as consumers and producers of wellness products and services so that they understand well, so that later this strategy has its own advantages for wellness tourism in Bali.

CONCLUSION

The rapid development of wellness tourism in Bali cannot be separated from the factors that influence it. The driving factors influencing wellness tourism in Bali are 90% relaxation factors and the pull factors for wellness tourism in Bali are 70% Heritage and culture factors.

The strengths, weaknesses, opportunities, and threats of wellness tourism in Bali are almost the same as those experienced by competitors from other countries in the Asia Pacific. Judging from the results of the analysis of the four elements of Bali, there are seven indicators of the strength that Bali has as a wellness tourist destination. includes wellness tourism in Bali as follows: (1) The holistic wellness advance that Bali has since the release of the film "Eat-Pray-Love" has attracted European tourists; (2) Bali has a world wellness tourism branding; (3) Local products related to wellness, including boreh and Lulur, are of interest to the international market; (4) Bali has a generic based and authentic base wellness product; (5) Wellness tourism in Bali has a spirit to grow meaning of life (understanding the energy of love to build harmonious relationships); (6) Wellness tourism in Bali is built through traditional practices rooted in local culture; (7) The hospitality of the local Balinese people. Weaknesses of Wellness Tourism in Bali which include (1) Lack of interest in inventory in the form of authentic wellness products; (2) Discrimination of tourist services by local spa workers; (3) The potential of spirit in wellness tourism in Bali has not been supported by adequate managerial; (4) Human resources in supporting the sustainability of wellness tourism are not sufficient; (5) The community's negative paradigm towards the local spa profession. The opportunities that can be developed by Bali as a wellness tourist destination are (1) the high demand for the international labor market for human resources in the wellness field (spa therapist); (2) The existence of Holistic wellness advance that Bali has since the release of the film "Eat-Pray-Love" has attracted European tourists; (3) Bali Spa Wellness Association establishes international partnerships in supporting the empowerment of human resources related to professional standardization; (4) The Asian region has the potential to drive the global fitness tourism market (Global Wellness Tourism); (5) Take advantage of the movement of the domestic tourist market in the era of the Covid-19 pandemic; (6) The market spectrum of wellness tourism in Bali has developed; (7) The government provides involvement in wellness activities, especially the preparation of workers; (8) Packaging of local products related to wellness by utilizing international standardized technology. Meanwhile, threats to the development of Wellness Tourism in Bali include (1) the existence of a Covid-19 pandemic; (2) Wellness tourism in Bali is developing

as a side market, not a sustainable market; (3) International market demand related to generic wellness products covers the visualization of unique products and local Balinese culture (purification and ancestor code); (4) Lack of interpretation and formulation of the essence of Balinese Wellness as an offer and acculturation of the International Wellness Concept; (5) Asia-Pacific countries (Malaysia, Laos, Philippines) have developed a special strategy to make wellness tourism their national investment target; (6) The motivation of international tourists to visit in the context of wellness tourism is influenced by infrastructure.

Furthermore, based on these data, the data obtained for the strategy of developing wellness tourism in Bali is in cell one (I). This illustrates the condition of aggressive development that is good and has the potential because the indicators of strength and indicators of opportunities owned by Bali are quite large as a wellness tourist destination. The main strategies that can be implemented include grow and built which refer to backward, forward or horizontal integration, market penetration, market development and product development (David and David, 2017). Bali has a generic based and authentic base wellness product that must grow more broadly. As well as building more international partnerships in supporting the empowerment of human resources related to professional standardization as has been done by the Bali Spa Wellness Association (built). Furthermore, to get a more significant strategy, based on the coordinate matrix image, Bali's position as a wellness tourism destination is in quadrant I which has implications for strategic references that can be used by Bali in the development of wellness tourism including (1) Market Development; (2) Market Penetration; (3) Product Development; (4) Horizontal, forward, backward integration and diversification related to wellness tourism. Furthermore, the results of the AHP analysis show strategic priorities, namely (1) Development of holistic wellness advance products and services to the fullest by utilizing natural resources in priority locations, (2) Strengthening identity of the form of wellness in Bali, (3) Strengthening the branding of world wellness tourism for the form of wellness in Bali internationally, (4) Strengthening wellness services in Bali in the form and basis of local culture, (5) Strengthening the target market for tourists, (6) Creating policies strict and binding on human resources, wellness tourism products and services. Based on the existing emergency scale, the priority strategy that must be implemented in the near future is strengthening the identity of the form of wellness in Bali. This is necessary to create a branding for Bali which so far has only developed on physical wellness tourism facilities and pays little attention to the application of Balinese local wisdom in the aspect of human resources for wellness tourism actors, wellness services and products.

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