



Cultural Integration and Urban Wellness Services: Consumer Behavior and Business Insights from Bungah Day Spa in South Jakarta

Kevin Gustian Yulius^{1*}, Callista Cemaraputri², Jimmy M.H. Situmorang³

¹Tourism, Faculty of Hospitality & Tourism, Universitas Pelita Harapan, Indonesia

²³Hospitality Management, Universitas Pelita Harapan, Indonesia

*Email: kevin.yulius@uph.edu¹, 01541210086@student.uph.edu²,
jimmy.mhs@uph.edu³

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ABSTRACT

The increasing demand for wellness services among urban residents has created opportunities for businesses that integrate cultural authenticity with modern comfort. This study aims to analyze consumer behavior and marketing strategies for urban wellness services through the case of Bungah Day Spa in South Jakarta. Using a mixed-methods approach, data were collected from structured surveys and interviews with 131 potential spa users. The findings reveal that young professionals and students prefer spa experiences emphasizing hygiene, cultural elements, and a strong digital presence. Price, ambiance, and authenticity were key decision factors, while digital engagement and word-of-mouth significantly influenced consumer choices. The results suggest that integrating traditional Indonesian practices with modern marketing strategies enhances competitive advantage and market appeal. These insights offer practical recommendations for developing culturally embedded wellness businesses to meet the evolving needs of Indonesia's urban market.

Correspondence Address : 73 Letjend. Suprpto Street, Kebumen, Central Java, Indonesia 54311

INTRODUCTION

The rise of wellness consciousness in urban society has become one of the most influential forces shaping the development of tourism-related businesses today (Karagianni et al., 2025; Pattanapokinsakul et al., 2025). In response to growing psychological stressors, modern urban residents are increasingly turning to wellness services that promote mental and physical rejuvenation (Cahyaningtyas & Kusuma, 2020; Konstantopoulou et al., 2024). This shift in consumer preference represents not just a lifestyle trend but a broader socio-economic transformation in urban consumption patterns (Fuaddah, 2023).

In Indonesia, the COVID-19 pandemic acted as a major catalyst in accelerating the adoption of healthy living behaviors (Putri et al., 2024). Despite the official transition to endemic status in 2023, the pandemic left a lasting imprint on public health awareness. Urban dwellers, in particular, have maintained a heightened focus on wellness practices as a means of minimizing health risks and enhancing overall well-being (Clerici et al., 2023; Jevtic et al., 2022; Pacheco et al., 2024).

Urban environments are often associated with high stress, pollution, overcrowding, and a

fast-paced lifestyle that strains mental health. These conditions have intensified the demand for anti-stress solutions that provide holistic relief (Montanari et al., 2024; Patterson et al., 2025). Consequently, wellness services are no longer considered luxury indulgences but are increasingly perceived as essential components of a balanced urban lifestyle (Karagianni et al., 2025; Smith & Puczko, 2014).

This emerging need has led to the evolution of wellness tourism models that emphasize sustainable, safe, and culturally grounded experiences. Consumers are not only seeking high-quality wellness treatments but also looking for services that align with their values, such as environmental sustainability, cultural authenticity, and community involvement (Arsić et al., 2024; Choe et al., 2025). These shifting demands challenge businesses to reframe their offerings beyond traditional service delivery.

In response, new wellness ventures have started integrating local heritage into modern wellness practices to offer unique and differentiated experiences. Indonesia's rich traditions of healing and bodywork, including Javanese and Balinese spa rituals, provide an abundant resource for such cultural integration (Arida et al., 2025; Solikhin et al., 2025). When adapted thoughtfully, these traditions can enhance customer value while simultaneously preserving intangible cultural assets (Kharisma & Muni, 2017).

Recent studies present both supportive and critical perspectives on cultural integration in wellness and hospitality services. Empirical research shows that culturally embedded wellness offerings can enhance perceived authenticity, emotional attachment, and customer satisfaction when traditional practices are professionally curated (Bakr et al., 2025; Solikhin et al., 2025; Uslu et al., 2024). Such integration also strengthens brand differentiation and loyalty in competitive urban markets (Zhang et al., 2025). However, other studies warn that superficial or commodified use of cultural elements may dilute meaning, reduce authenticity, and trigger negative consumer perceptions if community values are ignored (Choe et al., 2025; Tileaga, 2025).

Alongside cultural factors, digital engagement and word-of-mouth play a decisive role in shaping urban wellness consumer behavior. Online reviews, social media visibility, and influencer recommendations significantly influence trust and purchase intention, especially among younger, digitally oriented consumers (Goyal & Taneja, 2025; Seow et al., 2024). Nevertheless, research indicates that a strong digital presence cannot compensate for weak service quality or perceived inauthenticity (Che Abdul Rahim et al., 2024). Negative experiential feedback can spread rapidly and undermine brand credibility in urban markets.

Addressing these mixed findings, this study examines consumer behavior toward Bungah Day Spa, a culturally inspired urban wellness business in South Jakarta. Using primary data from potential spa users, the research analyzes how cultural elements, pricing, ambiance, hygiene, and digital engagement influence consumer preferences. The study contributes empirically to ongoing debates on whether cultural integration functions as a competitive advantage or a potential risk in wellness services. The case of Bungah Day Spa offers practical insights for developing culturally grounded yet market-responsive urban wellness businesses in Indonesia.

LITERATURE REVIEW

Urban Wellness Services

Urban wellness services represent a growing response to the challenges of modern city living, including high levels of stress, congestion, pollution, and sedentary lifestyles (Auliya & Koestoer, 2024; Johnston, 2025; Karagianni et al., 2025). These services encompass a wide range of offerings, including spas, massage centers, yoga studios, holistic healing, and mindfulness-based experiences (Karagianni et al., 2025; Smith & Diekmann, 2017). The rising health awareness among city dwellers has contributed to a shift in wellness from luxury to lifestyle necessity, especially after the COVID-19 pandemic heightened public consciousness about immunity, self-care, and mental well-being (Zhong et al., 2024).

Globally, the wellness economy has become one of the fastest-growing sectors, with urban populations in Southeast Asia showing particularly strong demand (Johnston, 2025). Urban wellness centers are increasingly designed as havens—calm, aesthetically pleasing environments within fast-paced cities—that offer sensory and emotional relief (Jeong, 2024; Sussman & Hollander, 2021). They do not merely treat the body but aim to restore mental balance and reconnect individuals with themselves through curated environments, trained practitioners, and targeted treatments (Liu et al., 2023; Pelegrín-Borondo et al., 2020).

Post-pandemic trends have emphasized four pillars commonly referred to as the 4S framework: safety, sanitation, sustainability, and solidarity (Elkhwesky et al., 2022; Orîndaru et al., 2021). Urban consumers increasingly expect wellness service providers to implement rigorous hygiene standards while also adopting socially and environmentally responsible practices (Das et al., 2022). These expectations have pushed wellness businesses to rethink operational design and service delivery, ensuring alignment with public health and sustainability goals while maintaining comfort and relaxation. The result is a more holistic, integrated model of urban wellness rooted in physical, psychological, and ethical well-being (Clerici et al., 2023; Maniou et al., 2026).

Consumer Behavior

Consumer behavior in wellness services is influenced by demographic factors such as age, gender, income, and lifestyle preferences (Weerakit & Tkachuk, 2024). Urban wellness consumers are typically young to middle-aged, professionally active, and increasingly well-informed about health and self-care options (Jiao et al., 2023; Pione et al., 2025). Gender dynamics often reveal a female-majority customer base, although interest from male consumers (Singh & Sharma, 2021; Zhang et al., 2023). These individuals are time-conscious and experience-driven, preferring services that offer both relaxation and social value (Quan et al., 2025).

Behavioral research shows that consumers often perceive wellness services as a reward for hard work or a necessary pause from daily routines (Weerakit & Tkachuk, 2024). The frequency of use varies, with most urban spa users visiting regularly, driven by motivations such as stress relief, physical therapy, and social bonding (Ahn & Kim, 2024; Palad et al., 2025). Many consumers prefer visiting with friends, family, or partners, indicating that wellness experiences are often shared, reinforcing their emotional and social impact (Lee & Kim, 2023).

Decision-making is strongly influenced by digital platforms and word-of-mouth,

particularly in urban centers where online reviews, influencer recommendations, and peer referrals play a major role (Goyal & Taneja, 2025; Seow et al., 2024). Consumers value visible proof of service quality, cleanliness, ambiance, and staff professionalism (Che Abdul Rahim et al., 2024). Price sensitivity also factors into behavior: many seek mid-range prices with high value, often responding positively to package deals or loyalty programs (Han & Bai, 2022). Ultimately, satisfaction is linked to repeat behavior, as consumers tend to return to providers who offer consistent quality, personalized treatment, and emotional comfort (Karagianni et al., 2025).

Cultural Integration in Service Offerings

Cultural integration in wellness services involves incorporating local traditions, philosophies, and aesthetics into the design and delivery of treatments (Zeng et al., 2023; Zhang et al., 2025). This includes using traditional ingredients, indigenous healing methods, and cultural themes in ambiance, music, or rituals. Studies in experiential marketing and tourism have found that customers derive deeper meaning and enjoyment when services reflect local heritage, giving them a sense of place and authenticity (Csurgó & Smith, 2022; Uslu et al., 2024; Zhu et al., 2025).

In Southeast Asia and other culturally rich regions, the wellness industry increasingly draws from traditional medicinal systems and bodywork techniques to appeal to both domestic and international markets (Solikhin et al., 2025; Tripathi & Ben Said, 2023). Examples include Ayurvedic treatments, Javanese and Balinese massage, *jamu* (herbal tonics), and reflexology practices rooted in indigenous knowledge (Chauhan et al., 2015; Nurcholis & Arianti, 2024). These offerings, when adapted respectfully and professionally, have shown to enhance customer loyalty and brand distinctiveness (Sudirjo et al., 2024).

In a hospitality related business, cultural integration must be executed with care, avoiding tokenism or superficial appropriation (Tileaga, 2025; Yulius, 2023). Services must reflect genuine cultural narratives supported by trained practitioners and proper contextualization (Chan et al., 2025). For urban consumers, authenticity and innovation must go hand-in-hand; they seek experiences that feel both rooted in heritage and refined to meet modern expectations (Gelbman, 2021). When delivered well, culturally integrated wellness offerings fulfill psychological, emotional, and cultural needs simultaneously.

Marketing Strategies for Wellness Businesses

Marketing in the wellness industry has evolved from product-focused to experience-centered strategies, emphasizing emotional connection, personal value, and digital interaction (Dahanayake et al., 2025). Urban wellness businesses operate within highly competitive environments, where differentiation and brand storytelling are crucial. The 8P marketing mix—Product, Price, Place, Promotion, Packaging, Programming, People, and Partnership—offers a comprehensive framework for understanding how wellness service providers can craft compelling value propositions that resonate with increasingly health-conscious and digitally engaged consumers (Morrison, 2022; Rahmawati, 2020).

In terms of Product, wellness businesses must ensure their core services, such as massages, body treatments, and therapy sessions, are of high quality and aligned with customer

expectations (Che Abdul Rahim et al., 2024). Successful wellness offerings often incorporate traditional healing practices with a modern twist, emphasizing natural ingredients, personalization, and wellness outcomes such as stress reduction or detoxification. Service quality depends not only on the technical aspects of treatments but also on ambiance, cleanliness, and attention to sensory details (Ahmed et al., 2023). A well-designed product offering blends functional benefits with symbolic and emotional value (Kim & Choi, 2025).

Price plays a central role in consumer decision-making in urban wellness markets. While consumers are often willing to pay for quality, they remain price-sensitive and seek perceived value (Ahmed et al., 2023). Mid-range pricing strategies supported by occasional discounts, seasonal packages, and loyalty programs are commonly used to attract and retain customers (Dominique-Ferreira & Antunes, 2020). Dynamic pricing—adjusting prices based on demand times or client segments—can optimize revenue without compromising accessibility.

Place, or distribution strategy, refers to how wellness services are made available to consumers (Morrison, 2022). In the context of urban wellness, strategic location is critical; spas and wellness centers are ideally situated in accessible areas near business districts, residential zones, or lifestyle hubs. In addition, digital presence functions as a virtual distribution channel. Online booking platforms integrated mobile apps, and e-wallet compatibility enhance customer convenience and enable seamless access to services (Basalamah, 2025).

Promotion is increasingly digital, leveraging social media platforms, influencer marketing, and online reviews to shape brand identity and trust (Javed et al., 2025). Visual content, educational posts, wellness blogs, and short-form videos can highlight service benefits and build emotional connection. Word-of-mouth remains important, especially when supported by loyalty schemes and referral incentives. Offline promotions—such as local events or partnerships with fitness centers—also reinforce brand presence.

Packaging refers to how services are bundled and presented to customers (Yunus, 2016). Spa packages that combine multiple treatments or offer time-based services (e.g., 90-minute wellness experiences) create added value and simplify decision-making. Clear and attractive packaging enhances the perceived value of services while encouraging clients to spend more time and money per visit. This also allows businesses to target different segments, such as couples, students, or corporate clients, with tailored offers.

Programming involves scheduled offerings and events that create a sense of novelty and community (Luekveerawattana, 2025). Examples include wellness workshops, detox weeks, holiday-themed spa rituals, or collaborations with yoga instructors. These programs foster customer engagement beyond one-off treatments, deepening brand loyalty and customer lifetime value. Programming also aligns the business with broader lifestyle trends such as mindfulness, sustainability, and holistic health (Uula, 2025).

People, particularly service personnel, are central to the delivery of wellness experiences (Sangpikul, 2022; Sulaiman et al., 2020). In wellness businesses, skilled and certified therapists, hospitality-trained front office staff, and empathetic service culture are non-negotiable components of customer satisfaction. The professionalism, communication skills, and therapeutic ability of staff greatly influence how clients perceive the quality of the service. Continuous training and alignment with service standards are vital in building a credible and competitive team (Assimakopoulos et al., 2023).

Lastly, Partnerships—especially in technology and financial services—are critical for scalability and operational efficiency (Al-Romeedy & Alharethi, 2024; Zeqiri et al., 2025). Collaborations with digital booking platforms, online review aggregators, and fintech companies enable smoother customer journeys. Integrating digital payment options such as QRIS, e-wallets, or credit card systems is now standard practice in urban wellness businesses. In addition, strategic alliances with fitness centers, hotels, and lifestyle brands help expand market reach and reinforce brand positioning within the broader wellness ecosystem (Ward, 2025).

METHODS

This study utilized a mixed-methods approach, integrating both quantitative and qualitative techniques to comprehensively assess consumer behavior and marketing potential of urban wellness services (Dawadi et al., 2021). The quantitative component involved structured surveys to capture data on consumer preferences, expectations, and demographics, while qualitative methods—such as informal interviews and observations—explored deeper motivations and experiences that quantitative questions alone could not reveal. This design was selected to provide both numerical insights and rich contextual understanding, especially relevant for evaluating a culturally influenced service business in an urban context.

The research population consisted of productive-age individuals living in South Jakarta and surrounding urban areas who were potential or existing users of spa and wellness services. A purposive sampling strategy yielded 131 respondents for the quantitative survey, ensuring participants had relevant experience or interest in wellness services (Campbell et al., 2020). Additional qualitative data were collected from interviews and observations with spa practitioners, wellness entrepreneurs, and consumers, allowing for triangulation and validation of key behavioral patterns and market insights.

Data sources included both primary and secondary materials. Primary data comprised questionnaire responses and interviews collected cross-sectionally, while secondary data were drawn from industry reports, demographic statistics, academic journals, and prior feasibility studies. Descriptive statistics and thematic analysis were employed to interpret the data, and ethical research standards—including informed consent and data confidentiality—were maintained throughout the study (Ahmed et al., 2025; Deckert & Wilson, 2023).

RESULTS & DISCUSSION

Consumer Profile and Market Demand

Demographics

The survey involved 131 respondents residing primarily in South Jakarta and surrounding urban areas, reflecting the core market of Bungah Day Spa. Most respondents were young adults, with 46.6% aged between 20–25 years and 22.9% aged 26–30 years, confirming that individuals in their twenties constitute the primary target segment. Female respondents dominated the sample at 67.9%, while males accounted for 32.1%, indicating that although the spa does not exclusively target women, female consumers remain the largest segment in the urban spa market. In terms of occupation, private-sector employees (45.8%) and students (36.6%) formed the majority, suggesting a consumer base that is professionally active or academically engaged.

Most respondents were residents of DKI Jakarta (53.4%), particularly Central, North, West, and South Jakarta, followed by Tangerang (33.6%), with smaller proportions from Bogor, Depok, Bekasi, and East Jakarta. Regarding income, nearly 35% earned less than IDR 4,500,000 per month, while a substantial share fell into higher income brackets, including 21.4% earning between IDR 8,000,000 and IDR 11,499,999, indicating considerable purchasing power for wellness services.

Behavior Patterns

Behavioral patterns reveal that spa visits are still largely occasional rather than habitual. Most respondents (60.3%) reported visiting a day spa less than once per month, while 35.1% visited once or twice monthly, suggesting potential for increased visit frequency if services align with consumer expectations. Spending per visit was predominantly moderate, with 49.6% typically spending IDR 201,000–300,000 for a full-body massage and 38.2% spending IDR 100,000–200,000, indicating sensitivity to value-based pricing. When selecting a day spa, price emerged as the most influential decision factor, followed by location, ambiance, and facilities. Online reviews and service variety were less dominant, highlighting that affordability, accessibility, and physical comfort remain primary considerations for urban spa consumers.

Market Potential

The observed consumer interest is reinforced by strong industry and economic indicators. The Asia-Pacific wellness economy reached USD 1.88 trillion in 2023 (Johnston, 2025), recording a year-on-year growth of 10.1%, while regional spa revenues rebounded sharply from USD 19.9 billion in 2020 to USD 36.0 billion in 2023. In Indonesia, spa revenues more than doubled during the same period, rising from USD 1.01 billion in 2020 to USD 2.11 billion in 2023, reflecting an average annual growth rate of 32.0% in the post-pandemic era. At the regional level, the “Other Services Activities” sector in DKI Jakarta—which includes wellness and spa services—achieved an 11.6% growth rate in 2023, surpassing pre-pandemic levels and signaling strong market resilience and expansion potential.

Consumer Preferences and Marketing Strategy

Product and Service Preferences (8P Marketing Mix)

Survey results reveal that urban wellness consumers place a high value on both the quality and authenticity of spa services. Bungah Day Spa’s offerings—such as Indonesian-style massages, locally sourced essential oils, complimentary herbal drinks, and strict hygiene practices—resonate strongly with target customers. Notably, the emphasis on hygiene, safety, and sustainability received the highest mean score (5.73 out of 6), highlighting these as top priorities. Packages that combine multiple treatments (e.g., flower bath + massage, aromatic hand & foot massage) are also well received, especially when priced attractively.

Table 1. Summary of 8P Marketing Mix Survey Results

8P Element	Highest-Rated Preferences (Mean Score)
Product	Hygiene/safety/sustainability (5.73), complimentary herbal drinks (5.38), cultural authenticity (5.21), locally sourced oils (5.10)

8P Element	Highest-Rated Preferences (Mean Score)
Price	Aromatic hand/foot massage for IDR 100K (5.02), Indonesian body massage for IDR 230–280K (4.98)
Place	Modern/traditional ambiance (5.40), convenient parking (5.27), strategic location (5.07)
Promotion	Positive online presence/reviews (5.31), informative social media (4.72)
Packaging	Aromatic hand & foot package (5.52), flower bath + massage package (4.52)
Programming	Special event discounts (5.44), unwind hour discounts (5.39), loyalty programs (5.08)
People	Responsive/caring staff (5.63), professional appearance/hygiene (5.60), product knowledge (5.56)
Partnership	Collaboration with banks (5.64), e-wallet providers (5.60)

Respondents consistently rate professionalism, service responsiveness, and employee knowledge as essential, reinforcing the importance of staff training and service culture in the spa business.

Cultural Authenticity and Urban Trends

A central theme in consumer preferences is the desire for cultural authenticity embedded within a modern, urban context. Indonesian wellness traditions—such as Javanese and Balinese massage, herbal remedies, and the use of local ingredients—are seen as unique value propositions, differentiating Bungah Day Spa from more generic competitors. This preference is in line with broader trends, where urban dwellers seek “authentic experiences” that provide not only relaxation but also a cultural connection and sense of identity. The blending of traditional treatments and modern amenities (e.g., design, comfort, and digital convenience) is viewed positively and enhances the appeal to both domestic and international clientele.

Digital & Word-of-Mouth Influence

Urban spa consumers in Jakarta rely heavily on word-of-mouth (58%) and social media (39.7%) for information and recommendations. Online reviews—particularly on platforms like Google—are also a significant decision factor, although slightly less important than personal referrals. This indicates that a strong digital presence, excellent customer feedback, and targeted social media engagement are crucial for building trust and attracting new customers. Traditional print and informational media have minimal influence in this market.

Pricing Sensitivity

Consumers are price-conscious, with nearly half (49.6%) preferring to spend IDR 201,000–300,000 per full-body treatment, and 38.2% opting for the IDR 100,000–200,000 range. While premium packages have appeal, affordability is a central concern, and most consumers are receptive to discounts, loyalty rewards, and package deals. This suggests that Bungah Day Spa’s mid-range pricing strategy aligns well with market expectations, enabling accessibility without sacrificing perceived value.

Business Feasibility and Competitive Analysis

Competitor Analysis

Bungah Day Spa operates in a highly competitive urban wellness market that includes both direct and indirect competitors. Direct competitors such as Yi Tiao Xian, Kokuo Family Massage & Reflexology, Martha Tilaar Salon & Day Spa, and Ame Spa offer similar core

services—massage therapy, reflexology, and general wellness treatments—within comparable urban locations and price ranges from IDR 100,000 to IDR 960,000. While these establishments generally maintain professional service standards and attract similar consumer segments, only a limited number place strong emphasis on cultural integration as a defining element of their wellness concept.

In addition to these direct competitors, Bungah Day Spa faces indirect competition from fitness- and therapy-oriented providers such as Pilates studios, yoga centers, gyms, and acupuncture clinics. Although these alternatives appeal to health-conscious urban consumers and offer comparable pricing, they focus primarily on physical conditioning or medical treatment rather than holistic relaxation. Bungah Day Spa differentiates itself by integrating Indonesian heritage through its 4S concept (sustainable, safe, sanitary, and solidarity), culturally inspired spa rituals, local sourcing, and community engagement, positioning the business within a niche that bridges generic urban spas and premium wellness retreats.

SWOT Analysis

Table 2. SWOT Matrix for Bungah Day Spa

Strengths	Weaknesses
- Strong alignment with urban wellness trends	- New brand, limited reputation
- Cultural authenticity as unique selling point	- Initial dependence on word-of-mouth and digital reach
- High service standards (hygiene, safety, sustainability)	- Limited scale (single location, staffing constraints)
- Skilled, well-trained personnel	- Competition with established brands
- Attractive, mid-range pricing and packages	
- Strategic partnerships (banks, e-wallets)	
Opportunities	Threats
- Growing urban demand for wellness services	- Market entry by new competitors
- Spa market recovery and robust growth post-pandemic	- Price wars and commoditization in spa industry
- Rising interest in authentic, local experiences	- Economic fluctuations affecting consumer spending
- Expansion via digital channels and loyalty programs	- Evolving health and sanitation regulations
- Partnerships with local businesses and influencers	- Changing consumer trends (shift to fitness/other modes)

The SWOT analysis for Bungah Day Spa highlights several internal strengths that align the business with current urban wellness trends. Key strengths include a strong emphasis on cultural authenticity—using Indonesian spa traditions as a unique selling point—and a firm commitment to high standards in hygiene, safety, and sustainability. These features not only cater to rising consumer demand for meaningful and responsible wellness experiences but also help Bungah differentiate itself from more generic spa competitors. Furthermore, the spa’s mid-range pricing, attractive service packages, skilled staff, and strategic partnerships with banks and digital payment providers contribute to both market accessibility and operational efficiency. However, as a new entrant in a competitive industry, Bungah faces internal weaknesses such as limited brand recognition and initial dependence on digital channels and word-of-mouth for customer acquisition. The single-location setup and potential staffing limitations may also challenge the business’s ability to scale quickly and compete with well-established chains.

Externally, Bungah Day Spa is positioned to seize significant opportunities driven by the post-pandemic recovery of the wellness industry and the increasing appetite for authentic, local experiences among urban consumers. The spa can further expand its market reach through digital marketing, partnerships with local businesses and influencers, and the development of customer loyalty programs. Nevertheless, Bungah must navigate several external threats, including intense rivalry from established spa brands, potential price wars, and the risk of market saturation. Economic fluctuations and evolving consumer trends—such as a shift toward fitness or alternative wellness modalities—could also impact business performance. By leveraging its core strengths and remaining agile in response to both opportunities and threats, Bungah Day Spa can establish itself as a resilient and distinctive player in Jakarta’s urban wellness sector.

Porter’s Five Forces Analysis

Table 3. Porter’s Five Forces for Bungah Day Spa

Force	Key Assessment for Bungah Day Spa	Impact
Threat of New Entrants	Moderate: Entry barriers are low, but differentiation through culture and quality can be sustained.	Medium
Bargaining Power of Buyers	High: Urban consumers are price sensitive, with many choices. Loyalty programs help retain clients.	High
Bargaining Power of Suppliers	Low to Moderate: Most supplies (oils, herbs) are locally sourced and not unique, but quality must be maintained.	Low–Medium
Threat of Substitutes	Moderate: Fitness studios, yoga, and clinics provide alternatives, but do not replicate the spa experience.	Medium
Competitive Rivalry	High: Market is crowded with established brands, but Bungah’s cultural positioning provides a niche.	High

The Porter’s Five Forces analysis reveals a competitive landscape that demands strategic differentiation and resilience for Bungah Day Spa. The threat of new entrants is assessed as moderate, primarily because entry barriers in the urban spa market are relatively low; new competitors can quickly emerge, attracted by growing wellness trends and the relatively straightforward requirements for launching a spa business. However, Bungah’s emphasis on cultural integration and high-quality service provides a defensible advantage that is not easily replicated by generic newcomers. The threat of substitutes is also moderate—while fitness studios, yoga centers, and alternative wellness clinics attract the same health-conscious urban consumers, they do not fully replicate the immersive relaxation and cultural experience unique to spa services. This underscores the need for Bungah to continually innovate and reinforce its unique value proposition.

Among the forces, the bargaining power of buyers and competitive rivalry stand out as particularly high. Urban consumers in Jakarta are discerning and price-sensitive, with a wide array of choices in the wellness sector. This heightens the importance of customer loyalty programs, consistent service quality, and a compelling brand identity to attract and retain clients. Simultaneously, the market is crowded with established brands, making competitive rivalry intense. Bungah Day Spa’s cultural positioning—rooted in Indonesian heritage and authentic experiences—enables it to carve out a niche market segment, but ongoing investment

in service excellence and brand building is crucial. In contrast, the bargaining power of suppliers is relatively low to moderate, as most essential supplies (such as oils and herbs) are locally available and not unique to one provider. However, maintaining consistent quality remains critical to meeting customer expectations and supporting the spa's premium positioning. Overall, success in this environment will require Bungah to leverage its unique strengths, maintain high service standards, and proactively respond to market changes.

Discussion

The findings from this research highlight a substantial market demand for culturally integrated urban wellness services in South Jakarta. Survey responses demonstrate that the majority of potential consumers are young adults and working professionals who value quality, hygiene, and authentic spa experiences. The top decision factors influencing their choice of spa—price, location, ambiance, and cleanliness—were consistently emphasized in both quantitative and qualitative results. Bungah Day Spa's proposed value proposition, which combines mid-range pricing, strategic location, and cultural authenticity, directly addresses these preferences, supporting the marketing strategy's alignment with actual consumer needs.

This study's results are strongly aligned with broader urban wellness trends documented in both the regional and global literature. The shift from spa services as luxury indulgences to wellness as an urban lifestyle necessity has been accelerated by the pandemic and the increased stress of city living (Johnston, 2025; Maniou et al., 2026; Saari et al., 2023). Consumers are no longer satisfied with basic treatments; instead, they seek meaningful experiences that deliver physical, mental, and emotional benefits. Bungah Day Spa's marketing concept, grounded in the 4S framework (sustainable, safe, sanitary, and solidarity), reflects the evolving expectations of today's wellness consumer and mirrors the successful strategies found in leading urban markets across Southeast Asia.

A notable differentiator identified in this research is the power of cultural integration as a marketing asset. Consumers in the target demographic are attracted to spa concepts that blend traditional Indonesian practices—such as Javanese and Balinese massages, locally sourced oils, and jamu-based wellness drinks—with a modern, comfortable spa environment (Solikhin et al., 2025). This preference for authenticity, as highlighted by the high survey scores for culturally inspired products and ambiance, suggests that effective marketing must communicate not only service quality but also a genuine cultural narrative (Bakr et al., 2025; Uslu et al., 2024). Such differentiation is particularly important in a crowded urban market, allowing Bungah Day Spa to stand out from more generic or international competitors.

Digital engagement and word-of-mouth were also identified as crucial channels in influencing consumer decisions (Anwar et al., 2024). The reliance on online reviews and social media platforms for spa recommendations indicates that successful marketing strategies must prioritize building a positive digital footprint and encouraging customer referrals. Loyalty programs, targeted social media content, and strong brand storytelling are all instrumental in developing consumer trust and fostering repeat visits.

For managers and practitioners, these insights underscore the need to continuously adapt marketing strategies to urban wellness trends and local consumer behaviors. Emphasizing cultural authenticity, service excellence, and digital engagement provides a clear path to

capturing and retaining the urban wellness market. Bungah Day Spa's experience suggests that the integration of tradition and innovation—supported by data-driven marketing—can effectively meet urban consumers' evolving demands and strengthen competitive positioning in the Jakarta wellness landscape.

CONCLUSION

This study confirms that successful urban wellness marketing depends on a nuanced understanding of consumer preferences, particularly among young professionals and students in metropolitan areas. The findings show that affordability, strategic location, hygiene, ambiance, and cultural authenticity jointly shape consumer decision-making, with strong interest in spa services that integrate traditional Indonesian practices into modern wellness experiences. Digital engagement and word-of-mouth emerge as critical drivers of trust and purchase intention, reinforcing the importance of online visibility and experiential consistency. Overall, the results demonstrate that culturally integrated wellness services, when aligned with contemporary urban expectations, can function as an effective competitive strategy in Jakarta's urban wellness market.

From a managerial perspective, the study suggests that wellness operators should prioritize service quality, hygiene standards, and authentic cultural storytelling while leveraging digital platforms and loyalty programs to strengthen customer engagement. However, this research is limited by its case-study focus and reliance on a single urban location, which may restrict the generalizability of the findings to other cities or wellness formats. Future research could expand the scope by conducting comparative studies across multiple cities or wellness business types, incorporating longitudinal data to assess behavioral change over time, or examining the perspectives of service providers and local communities to better understand the sustainability of cultural integration in wellness services. Such studies would deepen understanding of how culturally grounded wellness models can be scaled responsibly within Indonesia's evolving urban economy.

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