

Hospital Digital Marketing: Challenges and Adaptations in Facing Competition in Indonesia

Benedict Sulaiman, Ni Putu Diah Utami Darmayanti, Iva Nur Faridah

Universitas Indonesia, Depok, Indonesia

Email: benedict.sulaiman@yahoo.com, dr.diahutami@gmail.com, ivanurfaridah@gmail.com

Correspondence: benedict.sulaiman@yahoo.com*

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ABSTRACT

The global healthcare industry is undergoing a significant transformation driven by technological advancements and evolving patient expectations. This study aims to analyze the challenges and adaptations of digital marketing strategies in Indonesian hospitals, emphasizing the transformative impact of digital platforms like YouTube and Instagram on patient engagement and healthcare service delivery. Using a qualitative case study approach, data were collected through interviews with hospital stakeholders, document analysis, and observations of digital practices. The findings highlight that effective digital marketing strategies improve hospital visibility and patient relationships, while challenges such as fragmented health data, inadequate infrastructure, and insufficient regulations hinder progress. The study concludes that addressing these challenges through targeted investments and comprehensive legal frameworks can significantly enhance the global competitiveness of Indonesian hospitals. These insights offer practical implications for adopting ethical and sustainable digital marketing practices in the healthcare sector.

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Introduction

The global healthcare industry is undergoing significant transformation driven by technological advances and evolving patient expectations (Anjani & Prayoga, 2024; Rana et al., 2024). This shift is particularly noticeable in Indonesia, a country experiencing rapid growth in its digital economy and a significant population increasingly reliant on online resources for information and services (Alfonsius, 2023; Redjeki & Affandi, 2021). It is important to understand the specific challenges and successful strategies used by Indonesian hospitals in their digital marketing efforts to improve healthcare quality, patient engagement, and overall system efficiency. The benefits of successful digital marketing for healthcare providers are immense, including increased patient engagement, improved branding, and a wider scope of reach (Aswad et al., 2023; Rana et al., 2024). Digital marketing can facilitate online appointment scheduling, provide easy access to health information, and enable direct communication with patients, thus improving the relationship between patients and healthcare facilities for the better. In addition, effective digital marketing can contribute

significantly to attracting new patients and extending the hospital's reach to communities that may be underserved (Rana et al., 2024). Hospitals that cannot adapt to these marketing developments risk losing the market to competitors that effectively utilize digital marketing (Anjani & Prayoga, 2024; Hilda et al., 2023).

The COVID-19 pandemic has further accelerated the adoption of digital marketing strategies in Indonesia's healthcare sector (Alfonsius, 2023; Haryadi et al., 2022; Redjeki & Affandi, 2021). Restrictions on physical movement have made hospitals rely heavily on online channels for communication, patient engagement, and service delivery. This experience highlights the critical role of digital marketing in ensuring continuity of care and maintaining access to healthcare services during difficult situations (Redjeki & Affandi, 2021). However, the pandemic has also opened our eyes to the existing gaps in access to technology and digital literacy, emphasizing the need for inclusive digital marketing strategies that meet the needs of all segments of the population (Redjeki & Affandi, 2021; Setiawan et al., 2024). The success of digital marketing in Indonesia's hospital sector is also highly dependent on factors such as the availability of reliable internet infrastructure, the level of technological expertise within hospital staff, and the effective integration of digital marketing with the hospital's broader strategy (Anjani & Prayoga, 2024; Redjeki & Affandi, 2021).

On the other hand, the application of digital marketing itself needs to be done with due regard to applicable regulations. As outlined in the 2012 Code of Medical Ethics (KODEKI), Law of the Republic of Indonesia number 29 of 2004 concerning medical practice and Regulation of the Minister of Health of the Republic of Indonesia number 1787/MENKES/PER/XII/2010 concerning advertising and publication of health services. How does this compare with our neighboring countries that currently compete with Indonesia in providing health services.

Research Methods

This study employs a qualitative research methodology to explore the challenges and adaptations of digital marketing strategies in Indonesian hospitals. Qualitative research is chosen to provide an in-depth understanding of the phenomenon and context-specific insights. The research adopts a case study approach, focusing on selected hospitals in Indonesia that actively use digital marketing as part of their strategy. This approach allows for an exploration of specific practices, challenges, and successes in the digital marketing realm within the healthcare sector.

Data and Data Sources, the data for this study are derived from two main sources: **Primary Data**: Interviews with key stakeholders, including hospital marketing managers, healthcare providers, and patients. **Secondary Data**: Existing documentation such as hospital marketing reports, social media analytics, and relevant regulatory guidelines from Indonesian healthcare authorities.

Data Collection Techniques, the following techniques are utilized for data collection: **Interviews**: Semi-structured interviews with stakeholders to gather detailed insights into their experiences and perceptions. **Document Analysis**: Examination of hospital marketing materials, regulatory documents, and analytics reports to triangulate data from interviews. **Observation**: Direct observation of digital marketing practices in selected hospitals, including social media activities and website engagement strategies.

Data Analysis Techniques, the collected data are analyzed using thematic analysis. This method involves: Transcription and coding of interview data. Identification of key themes and patterns across primary and secondary data sources. Cross-comparison with literature and regulatory frameworks

to ensure a comprehensive understanding of the subject matter. This structured approach ensures the reliability and validity of the research findings while providing actionable insights into digital marketing strategies in Indonesian hospitals.

Results and Discussion

Implementation of Digital Marketing in Indonesian Hospitals

One form of implementation of digital marketing is the use of social media. As technology advances and internet penetration becomes more widespread in Indonesia, social media has become a vital tool in the digital marketing strategies of various industries, including the healthcare sector. Hospitals in Indonesia are starting to utilize platforms such as YouTube and Instagram to expand their reach and increase interaction with patients and the wider community.

YouTube, with its vast global reach and ability to deliver video content, offers great potential for hospitals to deliver health messages to the public (Pourkarim et al., 2022). Educational videos on diseases, medical procedures, and health tips can be uploaded and shared widely. Hospitals can utilize YouTube features such as live streaming to hold Q&A sessions with specialists, provide real-time health education, and build interaction with the audience (Permana et al., 2024). In addition, paid advertising on YouTube can be targeted to specific demographic groups, allowing hospitals to reach a more specific and relevant audience (Moslehpour et al., 2024). However, it is important to remember that the success of a digital marketing strategy on YouTube depends on the quality of the content, search engine optimization strategies, and managing interactions with audience comments (Lynn et al., 2020). Hospitals need to ensure the accuracy of the information provided and pay attention to the ethical aspects of interacting with the public on this platform (Farsi, 2021).

Instagram, with its focus on visuals and high engagement, also offers unique opportunities for hospitals in digital marketing (Vionita & Prayoga, 2021). High-resolution images and videos can be used to showcase hospital facilities, introduce medical teams, and share visually appealing health information. The stories and reels feature allows hospitals to share content that is shorter, dynamic, and easy for audiences to digest. Giveaway and contest strategies can be used to increase audience engagement and expand reach (Vionita & Prayoga, 2021). Hospitals can also collaborate with health influencers on Instagram to reach a wider audience and increase the credibility of the health messages delivered by them (Hidayana et al., 2023). However, it is important to remember that the use of Instagram should also be mindful of ethics and regulations related to health promotion, especially in terms of avoiding the dissemination of inaccurate or misleading information (Lynn et al., 2020). Hospitals need to establish a consistent and sustainable content strategy to maintain audience engagement and build a positive reputation on this platform (Stanislavská et al., 2020).

Despite the clear benefits, hospitals face challenges in producing consistent and authentic content, as well as in managing public interactions. Awareness of patient privacy and ethics in information dissemination are also major concerns. However, with the right strategy, social media can help hospitals increase the visibility and accessibility of health information.

Here are some examples of hospitals in Indonesia that have utilized social media as a digital marketing channel.

Table 1. Overview of YouTube and Instagram Usage by Private Hospitals in Indonesia

Hospital Name		Youtube		Instagram	
		Number of Posts	Number of Subscribers	Number of Posts	Number of Followers
Premier Hospital	Bintaro	732	121K	978	51.9K
Eka Hospital		397	70.8K	2.534	76.4K
Siloam Hospital		419	31.4K	2.298	153K
Mitra Hospital	Keluarga	885	37.8K	2.885	111K

Healthcare Competition

With the development of technology in the world of health, competition for health services is getting higher and more unlimited. Indonesia has long experienced competition for health services with Singapore and Malaysia, which have long had the stigma of being able to provide better health services than Indonesia (Komari & Djafar, 2021). With the existence of digital marketing, the marketing penetration of health facilities in these two countries into Indonesia is increasingly intense and can make more Indonesian citizens (WNI) seek health services abroad. President of the Republic of Indonesia Joko Widodo on September 6, 2024 when inaugurating the Ministry of Health's Vertical Hospital said that more than 1 million Indonesian citizens sought treatment abroad, causing the country to potentially lose foreign exchange of Rp. 180 trillion per year. The causes are of course predictable (Azizah, 2024; Yanuar, 2024): (1) comfort factor, many citizens feel more comfortable to seek treatment abroad, convenient facilities, easy access affect patient comfort, (2) communication factor, many citizens complain about communication from Indonesian health workers who are less communicative and responsive and less good at explaining diagnoses and providing health services, compared to doctors in the two countries who are more responsive and attentive, (3) opportunistic factors, both countries have a population far below Indonesia, However, both have advantages in tourism, Singapore and especially in Malaysia Penang are the 2 largest destinations for medical services because in addition to having advantages in hospital services, they are also tourist destinations, so that many Indonesian citizens who want to seek treatment also take advantage of time for vacation, making the development of medical tourism in both countries grow rapidly, (4) more sophisticated technological factors, medical services in Indonesia have begun to transform, Especially after Covid-19, many hospitals have begun to rely on new technologies to provide better and more efficient services, but of course information on these transformation initiatives must be intensively carried out to change the stigma that has been formed for a long time before, the two countries have indeed made many changes in the field of technology so that they are more mature and superior at this time, but Indonesia is still not inferior and quite competitive at this time, (5) the quality of health services, several times it has appeared in the news, some Indonesian doctors are less precise in providing diagnoses such as there are incidents of patients diagnosed with tuberculosis

and then taken to hospitals in Singapore, but then only given antibiotics for two weeks and recovered, so it is allegedly misdiagnosed, there are also several incidents of doctors in Indonesia being more 'royal' in providing drugs, this negative stigma does not build a good image and must be changed.

Seeing the competition above, Indonesia must also improve quickly in order to catch up. In 2023, the Indonesian government issued Law 17 on Health which regulates many new things including electronic medical records, health organization processes, health efforts, health service facilities, and health human resources. This is crucial to improving Indonesia's health infrastructure before it can be marketed and compete with Singapore and Malaysia. Unfortunately, Law 17 does not clearly regulate the digital marketing aspect, which in the author's view should be included because it is in line with current technological developments. In comparison, Singapore and Malaysia have regulated digital marketing of medical services in some of their regulations.

In Singapore, digital marketing for healthcare is tightly regulated by a number of regulations to ensure that marketing is accurate, ethical and not misleading.

1. The Health Products Act (HPA), regulates the advertising of health products:
 - All advertisements for health products, such as medicines, medical devices, or supplements, must comply with Health Sciences Authority (HSA) regulations.
 - Claims made in advertisements should be based on scientific evidence and not misleading.
 - Promotion of certain products that require a doctor's prescription is not permitted to the general public.
2. The Private Hospitals and Medical Clinics Act (PHMCA), regulates the promotion of health services:
 - Private clinics and hospitals must ensure that all advertising or marketing of medical services complies with the guidelines set by the Singapore Ministry of Health (MOH).
 - Advertisements should not make unrealistic claims, capitalize on fears, or offer promises of an absolute cure.
3. Singapore Medical Council Ethical Code and Ethical Guidelines (SMC ECEG), ethics for medical professionals:
 - Doctors doing digital marketing, including on social media, must adhere to the SMC code of conduct.
 - Advertisements should not contain misleading claims, exaggerate the benefits of medical services, or provide discounts that may be considered unethical.
4. Personal Data Protection Act (PDPA), data privacy in digital marketing:
 - The use of personal data of patients or prospective customers must comply with the PDPA.
 - Use of data for email marketing, SMS, or targeted advertising requires explicit consent from the individual.
5. Advertising Standards Authority of Singapore (ASAS)
 - All advertising, including digital advertising, must comply with the Singapore Code of Advertising Practice (SCAP) administered by ASAS.
 - Advertisements must be truthful, not misleading, and adhere to industry standards.

Meanwhile, in Malaysia digital marketing for the healthcare sector is governed by a number of regulations and guidelines to ensure ethical, accurate and non-misleading practices. Here are some of them:

1. Medicines (Advertisement and Sale) Act 1956 (Act 290)
 - Advertising of health products (drugs, supplements or medical devices) without the approval of the Malaysian Ministry of Health (MCH) is prohibited.
 - Products that require a doctor's prescription should not be advertised to the public.
 - Advertisements may not claim a complete cure for certain diseases such as diabetes, cancer, or hypertension, as per the list of protected diseases.
2. The Private Healthcare Facilities and Services Act 1998 (Act 586), regulates the promotion of medical services:
 - All healthcare advertisements and promotions must be approved by the Medical Advertisement Board (MAB) under KKM.
 - Promotions should not make unrealistic or misleading claims.
 - Healthcare advertisements are prohibited from using patient testimonials or promises of specific results.
3. Malaysian Medical Council (MMC) Ethical Guidelines
 - Doctors and medical personnel who promote their services through digital platforms, such as social media, must adhere to the Code of Professional Conduct (CPC).
 - Should not make exaggerated claims about their expertise or services.
 - Prohibition of offering discounts or financial incentives directly to patients.
4. Control of Drugs and Cosmetics Regulations 1984, regulation of health products and cosmetics:
 - All drug and cosmetic products must be registered and approved by the National Pharmaceutical Regulatory Agency (NPRA) before they can be advertised.
 - Advertisements for cosmetics are prohibited from making medical claims that cannot be scientifically substantiated.
5. Communications and Multimedia Act 1998 (CMA 1998), digital content monitoring:
 - All digital content, including health advertisements on online platforms, must comply with the guidelines set by the Malaysian Communications and Multimedia Commission (MCMC).
 - Prohibition of spreading false information or unverified claims.
6. Personal Data Protection Act 2010 (PDPA), data privacy in digital marketing:
 - In collecting customer or patient data for digital marketing purposes, organizations must obtain explicit permission from individuals in accordance with the PDPA.
 - The use of data for email marketing, retargeting, or other digital campaigns must be transparent and secure.

Challenges in Indonesia

What is done in these two countries is not something instantaneous but has been thought of and planned for a long time. Indonesia is currently catching up, but there are several challenges that must be faced in order to increase competitiveness. (1) Health Data Fragmentation, patient data is still scattered across different systems and formats, making it difficult to access and integrate

effectively. In 2022, Indonesia launched the Personal Data Protection Law that aims to protect the personal data of Indonesian citizens, while at the same time the Ministry of Health is also pushing to accelerate the transformation by launching SATU SEHAT, where medical record data will be consolidated and every health facility can easily access all contents of patient media records, reducing the potential for inefficient medical examinations and actions. By the end of 2024, the Ministry of Health has targeted all health facilities to use medical records integrated into SATU SEHAT. (2) Digital Infrastructure Limitations, not all hospitals have a qualified digital infrastructure to support an effective digital marketing strategy. (3) Changes in consumer behavior, post Covid-19, more digital services are accessed, teleconsultation, and also the nature of users who want to always share adds its own impact. (4) Funding priorities in hospitals which are currently also being used for other prioritization, many hospitals do not have the freedom of financial support so they have to sort out which ones are more priority and need to be done first.

Hospitals in Indonesia must improve and adjust to face these challenges. What is the strategy to use digital marketing as the main weapon to compete with these two countries, here are some initiatives that can be considered.

1. Professional and Informative Website

The hospital website must be a comprehensive and easily accessible information center, this includes information on services, doctors and facilities available. In addition, integration with other digital channels such as mobile applications, chatbots or even other digital service providers such as alodokter, halodoc or even insurance digital applications can be done to expand coverage.

2. Active and Engaging Social Media

Use current social media and build engagement with users and patients. Create interesting content and taglines, use moments such as national health day, world cancer day to provide educational and promotional content. In addition to the hospital's official social media, each doctor can also create their own content to educate their patients, currently there are many doctors who create YouTube, Instagram and TikTok channels to connect with their patients and provide educational context. Of course, safety and ethical aspects must still be upheld. Diversify social media, use various platforms to increase the reach and variety of user coverage.

3. Search Engine Optimization (SEO)

Optimizing website content to be easily found by search engines helps to increase the online visibility of hospital information.

4. Broadcast Message

Use media such as email, whatsapp, sms to broadcast messages to provide health services, either to registered hospital patients or using LBA (Location Based Advertising) technology, a digital marketing service that sends promotional messages to customers based on their geographic location.

5. Online Ads

Use paid ads on frequently visited channels or use social media ads such as on Tiktok, Instagram and Youtube, create content that is short enough but can be interesting to lure users to access the full content on the hospital's digital channel.

6. Reputational Management

Currently the most widely used online reviews are google reviews, often patients will complain if they are not satisfied but can also provide positive reviews if they are well served. A dedicated team

is needed to ensure all reviews can be served quickly so that they do not escalate into unwanted things.

In addition, it is important to note some important things to keep healthcare digital marketing in a positive realm:

- Medical claims must be evidence-based, all information about a health product or service must be supported by valid medical evidence.
- Avoid sensationalism, don't use language or images that overly scare or exaggerate results.
- Transparent discussion if working with influencers or conducting social media campaigns, there should be clear disclosure regarding sponsorship or collaboration.
- Educational campaigns, focus on campaigns that improve public health literacy, not just service promotion, because for educational materials, the role of health workers can also be emphasized and they can also participate in marketing.

In closing, the current regulations covering digital marketing in Indonesia are not as comprehensive as those in Singapore and Indonesia. There is a need for clarity and legal certainty to regulate what is and is not allowed. Many marketing efforts are inappropriate and even tend to be deviant, such as doctors who become endorsers or companies or individuals marketing drugs or supplements that have not been certified by BPOM. This should also be a concern for the government.

By implementing the strategies that have been submitted, hospitals in Indonesia can compete more effectively with hospitals abroad and can change the stigma of patients in Indonesia who prefer to go abroad. The hospital's reach becomes unlimited with digital marketing, with improved quality and building a good reputation, it is not impossible that in the future it will be foreigners who will visit Indonesia to get medical services which can also be supported by medical tourism. Facing challenges in digital marketing requires a flexible and adaptive strategy, hospitals need to understand and overcome business challenges and utilize them into opportunities to remain competitive in this digital era. Implementing the right digital solutions will not only support the implementation of digital marketing strategies but also enhance stronger relationships with patients and other users, building sustainable stickiness.

Conclusion

This study underscores the transformative potential of digital marketing in the healthcare sector, particularly for hospitals in Indonesia. By adopting digital platforms such as YouTube and Instagram, hospitals can expand their reach, enhance patient engagement, and improve service delivery. However, challenges such as fragmented health data, limited digital infrastructure, and gaps in digital marketing regulations must be addressed to optimize these benefits.

The findings reveal that hospitals leveraging social media and other digital tools effectively manage to improve patient relationships and competitiveness in both local and international markets. Ethical considerations and adherence to regulatory standards are crucial in ensuring sustainable and responsible digital marketing practices. Moving forward, comprehensive legal frameworks and investments in digital infrastructure will be pivotal in supporting the healthcare sector's digital transformation.

By addressing the identified challenges and adopting the recommended strategies, Indonesian hospitals can enhance their global competitiveness and contribute to better health outcomes while building a strong reputation in the digital era.

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