

Strategic Approach to Strengthen one Dentist's Competitive Advantage in the Dental Clinic Industry in Indonesia

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ABSTRACT

This study examines the strategic approach to improve SATU Dental's competitive position as the largest mid-market dental clinic operator in Indonesia. It aims to understand the effects of regional demographics, competition, and patient behavior on clinic performance and propose strategic initiatives to enhance competitiveness. The research combines quantitative and qualitative methods. The quantitative part analyzes revenue, patient volume, and growth across nine areas, while the qualitative part involves interviews with internal stakeholders. Data were analyzed using VRIO, PESTEL, Porter's Five Forces, and SWOT/TOWS frameworks. Results show regional performance differences. Bogor and East Jakarta have high growth due to middle-class demographics and moderate competition; North and Central Jakarta have strong revenues but slow growth from mature patient bases. Depok and Tangerang show low performance due to price sensitivity and limited accessibility. Qualitative analysis highlighted four themes: strategic alignment, financial management, operational contingencies, and clinical practice. VRIO identifies brand reputation and service standardization as lasting competitive advantages. PESTEL indicates a positive macro environment with middle-class growth and digitalization, tempered by exchange rate fluctuations and low-cost competition. The SWOT/TOWS analysis suggests three strategic directions: (1) Service Differentiation through Clinical Excellence and Digital Integration, (2) Human Capital and Capability Development, and (3) Operational Standardization and Performance Progress. In conclusion, SATU Dental's strategic competitiveness relies on balancing standardization with localization, targeting growth in high-potential areas, and innovating services in mature markets.

Keywords: ONE Dental, competitive advantage, strategic management, dental industry, marketing mix

INTRODUCTION

Indonesia's economic shifts, along with changing populations, consumer health preferences, and economic growth, have led to a rapid transformation of dental clinics in Indonesia (Pratama & Wibowo, 2021; Sari & Rahman, 2022). The growth of middle-class consumers toward preventive health behaviors is increasing, integrating aesthetic and preventive dental services into their health routines, resulting in new growth potential for independent dental practices (Suryani & Nugroho, 2020; Tan & Ahmad, 2022). The domestic dental market reached a domestic value of USD 200.25 million in 2022 and is projected to grow at a compound annual growth rate of 5.73%, with a projected value of USD 278.05 million by 2028 (Setiawan et al., 2023; Hadi & Santoso, 2021). Ongoing trends suggest that dental care has expanded its recognition as an essential aspect of complete health rather than a stand-alone healthcare service (Pang & Hariyadi, 2020; Wijaya et al., 2021).

Despite the expansion in the dental sector, Indonesia continues to experience low demand for care services. WHO figures reveal that only 30 percent of individuals with dental complaints seek treatment (World Health Organization, 2022). While about 2.28 percent of the population admitted dental morbidity, only 0.74 percent received treatment, resulting in a care gap of about 72 percent (Amin et al., 2023). Contributing factors include inadequate public education (Halim, 2021), the absence of dental insurance schemes (Smith & Jones, 2022), a cultural predisposition that emphasizes corrective care instead of preventive engagement

(Barker, 2020), a shortage of trained dental personnel (Rahman, 2021), and an uneven geographical distribution of practitioners (Nguyen & Patel, 2020). Collectively, aging demographics (Haryanto et al., 2021) and a limited dental workforce limit market dynamic, resulting in a potential demand plateau regardless of nominal sector growth (Lee et al., 2023).

Chains of private dental clinics emerged to fill the gap in dental services. One of them is SATU Dental, which offers professional and standardized dental services to Indonesia's urban population as a mid-market provider (Aldaba, 2024; Jittavisutthikul & Jamieson, 2022). Founded in 2022, SATU Dental now has more than 50 clinics in major metropolitan areas such as Jakarta, Surabaya, and Semarang. The company uses a centralized model that provides consistency of service at competitive prices, equipped with more than 250 dentists across Indonesia. As competitive pressures increase, the clinic network faces a strategic dilemma that goes beyond day-to-day operations. The disparity in clinic performance shows that without explicit strategic positioning, patient volume and service uptake would differ.

In this context, the competitive landscape in Greater Jakarta illustrates how players are distributed throughout the market. Premium clinics such as Audy Dental and Orange Dental focus on high-quality positioning and high prices, leveraging brand reputation and specialized treatments. Mass-market clinics such as OMDK and Damessa compete primarily on affordability but face limitations in perceived quality of service. Mid-tier providers like FDC Dental and Happy Dental balance price and service but lack strong differentiation. Instead, SATU Dental seeks to differentiate itself as a value-driven provider, offering high-quality, standardized services at accessible prices. SATU Dental's strategic placement in the "accessible yet high-quality" quadrant is an underrepresented space that offers opportunities and challenges for long-term competitiveness.

This research is positioned in a broader strategic landscape. The main objective is to investigate the interaction between service configuration, competitive positioning, and contextual variables to improve the sustainability and operational performance of the SATU Dental clinic network. By prioritizing the strategic management dimension over granular financial data, this study seeks to provide pragmatic guidance that strengthens SATU Dental's status as a leading mid-market provider in Indonesia's growing dental healthcare sector. Although SATU Dental continues to expand its metropolitan reach, its clinics show glaring performance inconsistencies. A handful of locations recorded robust revenue and steady visitor growth, while others were unstable.

Gaps cannot be attributed to practice size or years of operation alone. Instead, they arise from variations in local demographics, the level of market competition, and the nature of demand throughout the Greater Jakarta area, where the majority of units are concentrated. The geographical footprint of the Jabodetabek clinics illustrates the breadth of SATU Dental across key markets. The post stretches from the core of the central and southern districts of Jakarta to the suburban and peri-urban rings of Bekasi, Tangerang, Depok, and Bogor. This breadth makes the network subject to different competitive pressures and population segments, each carrying unique expectations for different services and utilization habits.

The revenue figures for each clinic reveal different regional performances. Clinics in East Jakarta and Bogor have shown steep revenue increases, indicating increasing demand but being relatively new to the market. In contrast, the North Jakarta and Central Jakarta clinics generated strong and stable revenues, but their annual profits tapered, a sign of market maturity and increased competition. These patterns illustrate that the main challenge is no longer purely about day-to-day operations but rather a lack of a clearly defined geographic strategic framework that tailors' offerings and performance targets to the unique characteristics of each area. Disparities across areas suggest that the underlying business problem is not just profitability at the clinic level but rather a deliberate lack of an area-based strategic framework.

To address performance gaps among SATU Dental clinics, this study examines the role played by regional market variations, competitive pressures, and differences in internal capabilities in driving uneven clinical outcomes. The study uses the VRIO, PESTEL, and Porter's Five Forces frameworks to uncover the underlying factors and translate them into actionable location-specific strategies that can improve performance across SATU Dental's network. The research questions posed are: (1) In what ways do regional variations in demographics, competitive density, and patient demand shape the performance trajectory of SATU Dental's clinics? (2) What internal resources and external factors, identified through VRIO, PESTEL, and Porter's Five Forces, explain the stark differences in revenue growth and market presence among clinics? (3) What local tactics can SATU Dental implement to increase its market presence and achieve a greater competitive advantage in the Indonesian dental clinic industry?

The objectives of this study are: (1) To quantitatively map the trajectories of revenue growth and performance variation across SATU Dental's regional clinics and link these patterns to competitive intensity and demographic driving factors; (2) To evaluate the interactive effects of internal capabilities, competitive forces, and environmental conditions at the clinical level, guided by the VRIO, PESTEL, and Five Forces frameworks; (3) To create integrated business-level strategic advice that leverages insights from different regions to strengthen SATU Dental's overall competitive advantage and guarantee more reliable and sustainable outcomes across its network of clinics.

Competitive advantage refers to an organization's ability to create superior value for its customers and achieve a superior position relative to its competitors. In the context of healthcare, particularly dental clinics, competitive advantage can be achieved through service differentiation, operational efficiency, and patient trust. The resource-based view (RBV) developed by Barney states that sustainable competitive advantage comes from valuable, scarce, hard-to-replicate, and well-organized organizational resources and capabilities. In the healthcare industry, such resources can include brand reputation, clinical expertise, standardized operational systems, and strong patient relationships.

Analysis of the external environment is important for understanding the opportunities and threats facing the organization. The PESTEL framework analyzes Political, Economic, Social, Technological, Environmental, and Legal factors that affect the industry. In the context of Indonesian dental healthcare, factors such as government regulation, growth of the middle

class, adoption of digital technology, and public health awareness play an important role. Porter's Five Forces framework evaluates the competitive intensity of the industry through the analysis of the threat of new entrants, the bargaining power of suppliers, the bargaining power of buyers, the threat of substitute products, and competition among competitors. This framework helps organizations understand the structure of the industry and identify strategies to improve their competitive position.

The service marketing mix was expanded from the traditional 4Ps (Product, Price, Place, Promotion) to 7Ps by adding People, Process, and Physical Evidence. In the healthcare industry, these seven elements are critical to creating value and patient satisfaction. Products (services) include the dental care portfolio offered; Price reflects pricing strategies and value perceptions; Place refers to clinic location and accessibility; Promotion includes marketing communications and patient engagement; People refers to the competence and attitude of medical and non-medical staff; Process includes service systems and procedures; and Physical Evidence includes the quality of the clinic's facilities and environment. The effective coordination of these seven elements can create a superior patient experience and a continued competitive advantage.

In a multi-location clinic network, a region-based strategy becomes important due to differences in local market characteristics. Research shows that clinic performance is strongly influenced by contextual factors such as demographics, local competition levels, purchasing power, and patient preferences. The one-size-fits-all approach is often ineffective in accommodating regional variety. Instead, organizations need to develop the ability to balance operational standardization with local adaptation. Standardization ensures consistency of quality and operational efficiency, while local adaptation allows responsiveness to specific market needs. This balance requires flexible management systems, data-driven decision-making, and effective communication between corporate management and local operations.

RESEARCH METHOD

The study adopted a descriptive and analytical research design to investigate SATU Dental's performance disparities across its network of clinics, aiming to strengthen its competitive advantage in Indonesia's dynamic dental healthcare industry. The research focused on exploring how variations in clinical outcomes were shaped by differences in market context, competitive intensity, and internal capabilities. By combining a descriptive analysis of existing conditions with the analytical framework of strategic management, the study provided a holistic diagnosis that connected operational reality with strategic positioning.

The descriptive component outlined the performance patterns across SATU Dental clinics based on area-based grouping. Instead of categorizing clinics solely by maturity or income performance, the study examined them in nine geographic clusters within the Greater Jakarta area: Central Jakarta, South Jakarta, West Jakarta, East Jakarta, North Jakarta, Tangerang, Bekasi, Depok, and Bogor. This approach was chosen because clinical outcomes were influenced not only by internal operational factors but also by external market conditions. For example, Central Jakarta showed higher average revenue per clinic due to higher

purchasing power and dense white-collar populations, while East Jakarta and Bogor exhibited faster growth trajectories associated with a growing middle-class segment but greater price sensitivity.

The study used a combination of secondary data analysis and primary qualitative investigation to develop a comprehensive understanding of SATU Dental's performance in different geographic areas. The main focus was to analyze area-based revenue and growth data along with contextual information such as demographics, economic class distribution, and local competition intensity. This approach ensured the findings highlighted both internal performance and external environments shaping clinical outcomes. Secondary data were taken from SATU Dental's internal performance records, specifically revenue and growth figures disaggregated by geographic clusters. This data provided a basis for identifying disparities across areas and evaluating how location-based market dynamics affected clinic performance.

To complement this, qualitative data were collected through semi-structured interviews with internal stakeholders, including clinic managers, marketing staff, and operations leaders. These interviews captured perceptions of local competition, demographic influences, patient demand patterns, and marketing effectiveness. Additionally, informal direct observations at selected clinics were conducted to gather contextual insights on patient profiles, service accessibility, and operational practices. This qualitative component enriched the interpretation of revenue patterns and provided a nuanced understanding of strategic opportunities and challenges at the area level. This mixed-methods approach ensured quantitative data on revenue trends were interpreted in a broader context, while qualitative evidence reinforced the validity of strategic conclusions.

The study employed a multi-level data analysis approach integrating area-based performance evaluation with external strategic analysis tools. The aim was to uncover the underlying factors of performance disparities across SATU Dental clinics and provide evidence-based recommendations to strengthen the company's competitive advantage. The analysis began with a quantitative assessment of revenue and growth trends across various geographic clusters from 2023 to 2025. This step identified high- and low-growth patterns, allowing categorization of clinical clusters according to their performance trajectories. The second stage involved contextual analysis, mapping the specific demographic, economic, and competitive characteristics of each area to the observed revenue outcomes.

Based on this descriptive foundation, the study applied a strategic analysis framework to connect internal capabilities with external conditions. The VRIO framework assessed whether SATU Dental's internal resources—such as standardized service processes, brand recognition, and dentist network—represented ongoing competitive advantages. The PESTEL analysis captured external macro-environmental factors, including regulatory policies, economic shifts, and societal trends affecting the dental healthcare market. Porter's Five Forces evaluated competitive pressures across various geographic clusters, including competition among dental providers, patient bargaining power, and the threat of substitution. The insights from these analyses were synthesized through a SWOT/TOWS framework, aligning internal strengths and weaknesses with external opportunities and threats to generate actionable strategies.

RESULTS AND DISCUSSION

Quantitative Analysis

This section presents a quantitative analysis of SATU Dental's operational performance based on secondary data for the period 2023 to 2025. The focus of the analysis is on the volume of patients served by various clinics and revenue growth in eight regional clusters in the Greater Jakarta area. Quantitative indicators are analyzed to identify differences in performance, growth patterns, and operational inefficiencies across regions. The results provide factual support to understand the contribution of regional dynamics and clinical maturity to overall business performance.

Revenue data per clinic shows a clear disparity in revenue performance between locations, as a function of varying market maturity and differences in demand within the local population. Central Jakarta and North Jakarta consistently presented the highest revenues across observations, and this suggests they serve as key cash flow generators in SATU Dental's business model. The superior revenue performance of these regions can be attributed to their relative population density, higher purchasing ability for dental services, and proximity associated with commercial areas that generate predictable revenue demand for premium dental services. In contrast, areas such as East Jakarta and Bogor have shown strong revenue growth over time, despite having smaller initial revenues.

Table 1. Average Revenue Per Clinic by Region (2023-2025)

Region	2023 (IDR Million)	2024 (IDR Million)	2025 (IDR Million)	Growth
Central Jakarta	450	485	510	13,3%
North Jakarta	420	455	480	14,3%
East Jakarta	280	370	445	58,9%
Bogor	250	325	390	56,0%
Bekasi	310	335	360	16,1%
Tangerang	290	305	320	10,3%
Depok	265	280	295	11,3%

These observations indicate a growing market where SATU Dental's expansion strategy in the greater outer Jakarta area may turn into a financial return. This experience suggests that organizational expansion in the greater outer Jakarta area may turn into a financial return, assuming growth does not require consuming costs or resources eliminated in time studies. In contrast, Bekasi, Depok, and Tangerang have shown moderate and stable revenue growth, showing a balance of performance in the semi-mature market. Their contribution is fundamental to maintaining sustainable cash flow, and while revenue data will suggest other potential benefits of additional marketing and service diversification could stimulate revenue growth, the sustainability of cash flow is a priority.

Qualitative Analysis

The results of the qualitative analysis emerged from four semi-structured interviews with SATU Dental's internal stakeholders which included the Corporate Strategy Manager, Finance Business Partner, Area Clinic Supervisor, and Senior Dentist. The interview is conducted in 30 to 45 minutes, only the interviewer and the participant themselves to make the interview comfortable and encourage the openness of the participants to answer honestly. Analysis implements the process of systematic qualitative data interpretation by applying coding techniques and identifying themes and condensing meanings to extract patterns and

relationships in the data. The research findings show that strategic alignment and financial management, operational dynamics, and elements of clinical practice form the basis for assessing organizational performance.

The qualitative findings are organized into four overarching themes derived from the coding process: Strategic Alignment and Business Priorities, Financial Management and Resource Allocation, Operational Challenges and Local Market Dynamics, and Clinical Practice and Patient Behavior. The four themes show how the different levels of organizations at SATU Dental come together to create a complete understanding of performance and competitive strength through their strategic, financial, operational, and clinical connections. The researchers identified the theme through repeated patterns in the interview data, which they then confirmed across different participant roles to achieve analytical reliability.

The first theme, Strategic Alignment and Business Priorities, refers to the extent to which clear integration between company objectives, resources, and activities towards the achievement of long-term goals. At SATU Dental, strategic alignment and business priorities create clarity on how corporate strategy translates into operational initiatives across more than 50 clinics. Corporate Strategy Managers emphasize that they currently believe their competitive advantage is being able to deliver high-quality services at a price point within the affordability range to the mid-market. However, achieving consistent performance across clinics due to different demographic conditions and local competition can be difficult as an overarching strategy.

The second theme, Financial Management and Resource Allocation, refers to how an organization plans, monitors, and distributes its financial resources to achieve operational efficiency and strategic growth. In the context of SATU Dental, this function plays an important role in maintaining profitability in a network of clinics with varying levels of performance and market dynamics. Finance Business Partner explained that SATU Dental uses a structured financial monitoring system that combines accounting and operational data. This monitoring system provides transparency into clinic-level efficiency and allows for rapid intervention when performance deviates from the target. The prioritization of financial metrics reflects a performance-driven culture within the organization.

The third theme, Operational Challenges and Local Market Dynamics, refers to contextual and management-related aspects that affect how clinics provide services and compete in their local areas. For a multi-clinic organization like SATU Dental, these dynamics include different levels of accessibility, visibility, patient demographics, staffing, and levels of competition that directly affect the performance and growth of each clinic. From an operational perspective, the Area Clinic Supervisor emphasizes that clinic visibility and accessibility remain the key determinants of patient acquisition. This statement describes how the physical environment and location design can facilitate or hinder patient flow, especially in competitive urban areas where comfort and exposure greatly influence patient decisions.

The fourth theme, Clinical Practice and Patient Behavior, is a key dimension that influences service quality, care mix, and long-term sustainability in healthcare organizations. In the context of SATU Dental, this theme explores how clinical processes, specialist availability, and patient decision-making patterns shape operational and financial outcomes. Understanding these behavioral dynamics is essential for designing an effective portfolio of services and improving the patient experience across diverse markets. Senior Dentists note that general dental care still dominates patient demand, but awareness of cosmetic dental care is increasing, especially in urban areas. These findings confirm that preventive and essential

services serve as the primary entry point for most patients, while more advanced or aesthetic treatments remain secondary in demand.

Strategic Analysis

The second phase translates internal data into strategic insights through various frameworks. VRIO's analysis assesses internal capabilities, such as brand strength, dentist specialty, clinic infrastructure, and technology adoption, for their potential to create a sustainable competitive advantage. This analysis provides the foundation for determining which internal factors can be strategically leveraged. The PESTEL analysis evaluates the external macro environmental factors that shape the strategic context of SATU Dental. Political and regulatory conditions, economic trends, and social dynamics are analyzed along with technological, environmental, and legal factors. This external mapping highlights the risks and opportunities that can influence strategic options.

VRIO's analysis shows that SATU Dental has two internal resources identified as the primary source of continued competitive exclusivity: brand reputation and patient trust, and service processes and standardization. Both of these resources have been found to be valuable and scarce because they are motivators of patient loyalty, brand value, and consistent quality of service. The organization has developed these capabilities through ongoing development and training, service culture, and operational standardization that provides uniformity in support to every patient regardless of location and in their experience of professionalism and comfort. With these resources deeply embedded in SATU Dental's operational routines, clinical systems, and human interactions, they are difficult for competitors to replicate.

PESTEL analysis shows that the external environment presents enabling conditions and structural barriers to the strategic expansion of the business. Political and social trends are changing to support behaviors that promote preventive health in some areas and increase understanding of the dental profession, while economic disparities and regulatory fragmentation persist. Technology-derived innovations can enable innovative value propositions for dental organizations, but ultimately require greater integration across the organization. Environmental and legal conditions are less sequential competitive factors; However, these conditions are more relevant considerations to ensure long-term sustainability and a path to compliance. Overall, SATU Dental's success will depend on its ability to align strategic agility with environmental responsiveness.

Porter's Five Forces provides a useful approach to assess the competitive intensity and structural attractiveness of the dental clinic sector in Indonesia. As Porter points out, industrial profitability is the product of five main competitive forces: newcomers, supplier bargaining, buyer bargaining, substitution, and existing rivals. The level of threat faced from newcomers in the dental services industry is moderate to high. The barriers to entry are relatively low, as small to medium-sized dental clinics require a moderate level of capital, and little significant regulatory approval is required. However, maintaining consistent service quality, brand trust, and clinical standards represent significant barriers for newcomers. The bargaining power of suppliers in negotiations is moderate. The majority of dental tools and supplies are brought in from abroad, resulting in vulnerability to currency variations and dependence on suppliers.

The SWOT and TOWS analyses synthesize internal and external findings, resulting in twelve strategic options that are then refined into three integrated strategic directions. The integration of Service Differentiation through Clinical Excellence and Digital Integration is justified by their shared strategic goals of improving patient experience and competitive differentiation. The strategic direction of Human Capital and Capability Development

consolidates initiatives that address core internal weaknesses of high staff turnover and the need for sustainable competency development. The Direction of Operational Standardization and Performance Progress consolidates initiatives related to performance consistency, data-driven management, and operational control. The integration is justified by the fact that each of the combined strategies addresses the efficiency and financial sustainability of different dimensions.

CONCLUSION

This research explored strategic approaches to enhance SATU Dental's competitive advantage amid Indonesia's increasingly competitive dental clinic market by examining internal and external factors affecting performance through quantitative and qualitative analyses and applying frameworks such as Marketing Mix, VRIO, PESTEL, Porter's Five Forces, and TOWS. Findings highlighted that clinic performance varies significantly with regional demographics, competitive density, and patient demand—clinics in high-growth areas like Bogor and East Jakarta thrive due to favorable middle-class populations and moderate competition, while those in mature markets like North and Central Jakarta face saturation and slower growth. VRIO analysis confirmed enduring competitive advantages in brand reputation and standardized service processes, whereas human capital offered only a temporary edge. PESTEL identified supportive macroeconomic factors, including a growing middle class and regulatory incentives, alongside challenges like increased competition and price sensitivity. Porter's Five Forces underscored moderate to high industry competitiveness propelled by aggressive rivals and patient bargaining power, emphasizing the importance of differentiation through superior patient experience, service quality, and digital integration. Consequently, the study proposed three strategic directions for SATU Dental: Service Differentiation via clinical excellence and digital innovation, Human Capital and Capability Development, and Operational Standardization with Performance Advancement. Future research could deepen these insights by investigating the impact of emerging digital health technologies and patient engagement platforms on competitive positioning across diverse Indonesian regions, potentially guiding further innovation in service delivery and market adaptation.

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