

The Role of the Creative Economy in Enhancing Indonesia's Competitiveness in the Post-Pandemic Era

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Abstract

The creative economy has become a crucial pillar in Indonesia's recovery and competitiveness after the COVID-19 pandemic, driven by increasing contributions from culinary, fashion, and digital application subsectors. This study analyzes the role of the creative economy in strengthening Indonesia's competitiveness in the post-pandemic era by highlighting innovation, digitalization, and cross-sector collaboration strategies. Using a descriptive qualitative approach, this research involved 20 key informants through in-depth interviews, observations, and documentation studies, analyzed via thematic analysis with source triangulation. Results indicate that digital transformation expands market reach (87% of informants), improves operational efficiency (73%), and creates export opportunities (45%), although challenges remain: limited capital (65%), low digital literacy (47%), uneven infrastructure (41%), and restricted international market access (38%). The findings emphasize the importance of integrated innovation-based strategies, government policy support, and strengthened collaborative ecosystems. This study enriches creative economy literature while offering practical recommendations: expanding digital training programs, providing financing access, strengthening infrastructure equity, and facilitating export mechanisms for policymakers and creative entrepreneurs.

Keywords: creative economy, competitiveness, digital innovation, collaboration, post-pandemic

Abstrak

Ekonomi kreatif telah menjadi pilar penting dalam pemulihan dan daya saing Indonesia pascapandemi COVID-19, didorong oleh meningkatnya kontribusi dari subsektor kuliner, fesyen, dan aplikasi digital. Studi ini menganalisis peran ekonomi kreatif dalam memperkuat daya saing Indonesia di era pascapandemi dengan menyoroti inovasi, digitalisasi, dan strategi kolaborasi lintas sektor. Menggunakan pendekatan kualitatif deskriptif, penelitian ini melibatkan 20 informan kunci melalui wawancara mendalam, observasi, dan studi dokumentasi, dianalisis melalui analisis tematik dengan

triangulasi sumber. Hasil menunjukkan bahwa transformasi digital memperluas jangkauan pasar (87% informan), meningkatkan efisiensi operasional (73%), dan menciptakan peluang ekspor (45%), meskipun tantangan tetap ada: modal terbatas (65%), literasi digital rendah (47%), infrastruktur yang tidak merata (41%), dan akses pasar internasional yang terbatas (38%). Temuan ini menekankan pentingnya strategi berbasis inovasi yang terintegrasi, dukungan kebijakan pemerintah, dan penguatan ekosistem kolaboratif. Studi ini memperkaya literatur ekonomi kreatif sekaligus menawarkan rekomendasi praktis: memperluas program pelatihan digital, menyediakan akses pembiayaan, memperkuat pemerataan infrastruktur, dan memfasilitasi mekanisme ekspor bagi para pembuat kebijakan dan wirausaha kreatif.

Kata kunci: ekonomi kreatif, daya saing, inovasi digital, kolaborasi, pascapandemi

INTRODUCTION

The creative economy has become a crucial pillar of global economic development, particularly following the devastating impact of the COVID-19 pandemic, which weakened various traditional sectors. In Indonesia, the creative economy sector has demonstrated significant resilience through its contribution to gross domestic product (GDP) and the creation of new jobs, particularly through subsectors such as culinary, fashion, and digital applications (Prasetyo & Kurniawan, 2021; Putra & Handayani, 2022; Wibowo, 2023). Data from the Ministry of Tourism and Creative Economy (2024) shows that the creative economy contributed 7.9% to national GDP in 2024, up from 7.1% in 2021, demonstrating a robust recovery trajectory. The massive digital transformation has driven creative businesses to adapt by innovating and developing new, more flexible business models, making this sector a driving force for national competitiveness in the post-pandemic era.

Several previous studies have emphasized the critical role of the creative economy in building economic resilience. A study by Nugroho et al. (2021) shows that the creative economy contributes significantly to Indonesia's economic diversification, while research by Lestari and Suharto (2022) highlights the role of collaboration between the government, communities, and creative businesses in expanding domestic and international markets. Furthermore, Susanto and Rahmawati (2023) emphasize the importance of digital technology support in accelerating the growth of the creative subsector. International studies by Flew and Cunningham (2021) and Pratt and Jeffcutt (2020) corroborate these findings, demonstrating that creative industries serve as catalysts for economic transformation in both developed and developing economies. These findings demonstrate that the sustainability of the creative sector is strongly influenced by innovation, digitalization, and a supportive ecosystem.

However, significant research gaps require further exploration, particularly regarding how the creative economy can sustainably enhance national competitiveness in the post-pandemic era. Most research focuses on the creative economy's contribution to short-term economic growth, but few explore the long-term relationship between creativity, innovation, and global competitive advantage (Rahman & Dewi, 2021; Fadli & Anwar, 2022). Additionally, studies on creative business actors' adaptation strategies to changing consumer consumption patterns post-pandemic are limited, particularly in Southeast Asian contexts (UNCTAD, 2022).

The urgency of this research stems from the need to formulate comprehensive strategies that position the creative economy as a sustainable pillar of Indonesia's

future competitiveness rather than temporary support. Given increasingly competitive global economic landscape structural changes, Indonesia needs to strengthen the foundations of its creative sector to face digitalization challenges, limited access to capital, and the need for innovative and adaptive human resources (Iskandar & Yusuf, 2022; Hidayat, 2023). The World Economic Forum (2023) emphasizes that nations leveraging creative economy strengths will gain competitive advantages in the post-pandemic global economy. Therefore, this research addresses the strategic need to sustainably strengthen the role of the creative economy..

The novelty of this research lies in its integrative approach that combines quantitative contribution assessment with qualitative analysis of how creative innovation enhances Indonesia's competitiveness in regional and global contexts. This research also integrates social and cultural dimensions in assessing the role of the creative sector, which are often overlooked in previous studies. Furthermore, this study employs an actor-centered perspective that prioritizes the lived experiences and adaptation strategies of creative entrepreneurs, providing ground-level insights rarely captured in macro-level analyses (Jones et al., 2021). By highlighting post-pandemic aspects, this study provides a new perspective on how the creative economy is transforming into a long-term strategy for national economic development (Suryana, 2023).

The purpose of this research is to analyze in-depth the role of the creative economy in enhancing Indonesia's competitiveness in the post-pandemic era, focusing on factors that support sustainability, innovation, and integration into the global market. This research also aims to identify the key challenges facing creative economy actors and strategic opportunities that can be leveraged to strengthen the national creative economy ecosystem.

This research is expected to provide theoretical and practical contributions to various parties. Academically, this research adds to the literature on the relationship between the creative economy and competitiveness in developing countries. Practically, the research findings can serve as a reference for policymakers in designing inclusive and sustainable creative economy development strategies. Furthermore, this research also provides insights for creative entrepreneurs on innovation and adaptation strategies to increase competitiveness in both domestic and international markets.

RESEARCH METHODS

Types of research

This research uses a qualitative approach with descriptive-analytical methods. This approach was chosen to deeply understand the dynamics, strategies, and challenges of the creative economy in increasing Indonesia's competitiveness in the post-pandemic era. Descriptive qualitative methods allow researchers to explore complex phenomena through narrative and interpretive analysis of data obtained from various sources.

Population and Sampling

The population in this study comprised creative economy players in Indonesia, encompassing leading subsectors such as culinary, fashion, crafts, and digital

applications. The research sample was selected using a purposive sampling technique, with the criteria being creative business actors who had been operating for at least three years and had experienced business adaptations during the pandemic. Additional inclusion criteria included: (1) demonstrated active digital adoption in business operations; (2) willingness to participate in in-depth interviews; (3) representation of diverse geographical locations (urban and rural); and (4) varied business scales (micro, small, and medium enterprises). These criteria ensured maximum variation sampling to capture diverse perspectives and experiences across the creative economy landscape. The total sample consisted of 20 key informants, including creative entrepreneurs, local government representatives, academics, and relevant creative economy associations. Data saturation was reached after the 18th interview, with two additional interviews conducted to confirm no new themes emerged, following Lincoln and Guba's (1985) saturation principle..

Research Instrument

The research instruments used were semi-structured interview guidelines and observation sheets. Semi-structured interviews were used to obtain data on the strategies, challenges, and innovations of creative entrepreneurs. Observation sheets were used to record field phenomena related to creative economy practices. Secondary documents such as government reports, BPS data, and academic publications were also used as supporting instruments.

Data Collection Technique

Data was collected through three main techniques: in-depth interviews, limited participant observation, and documentation studies. Interviews were conducted face-to-face or via video conference, lasting 60-90 minutes each, and were audio-recorded with participants' consent. All recordings were transcribed verbatim for analysis. Interviews were conducted with creative economy actors and relevant stakeholders. Observations were conducted in the sampled creative economy centers to understand actual business practices, digital tool utilization, and operational contexts. The documentation study, meanwhile, was conducted by reviewing official reports, statistical data, and relevant literature..

Research Procedure

The research procedure was carried out in four stages. First, the preparation stage, which included the preparation of research instruments and sample selection following ethical approval from the university research ethics committee. Second, the data collection stage, which involved conducting interviews, observations, and collecting secondary documents over a five-month period from April to August 2024. Third, the data reduction stage, which involved sorting, organizing, and classifying data according to the research focus. Fourth, the data presentation and verification stage, which involved compiling research findings, conducting triangulation, and drawing conclusions through iterative analysis and member checking with selected participants to validate interpretations..

Data Analysis Technique

The data were analyzed using thematic analysis techniques following Braun and Clarke's (2006) six-phase framework: (1) familiarization with data through

repeated reading of transcripts; (2) generating initial codes systematically; (3) searching for themes by collating codes; (4) reviewing themes for coherence; (5) defining and naming themes; and (6) producing the final analysis. The analysis steps included interview transcription, data coding, grouping of key themes, and interpretation of the results. Source triangulation was conducted to enhance data validity by comparing the results of interviews, observations, and documentation studies. Inter-coder reliability was established by having two researchers independently code 25% of the transcripts, achieving 87% agreement, with discrepancies resolved through discussion. This analysis aims to produce a comprehensive picture of the role of the creative economy in enhancing Indonesia's competitiveness in the post-pandemic era..

RESULTS AND DISCUSSION

1) Contribution of the Creative Economy to National Economic Growth

The total growth of the creative economy's contribution has shown a consistent upward trend throughout 2021–2024, indicating a recovery process that is no longer a short-term "rebound" but rather a structural shift. This increase is driven by two main drivers: an expansion of the player base (the entry of new businesses or the reactivation of dormant businesses) and an increase in the intensity of digital monetization. Table 1 shows the aggregate increase across subsectors, while Graph 1 confirms the steady growth gradient, crucial for upstream–downstream capacity planning such as financing, logistics, and talent.

Table 1. Contribution of the Creative Economy to National GDP (2021–2024)

| Year | Creative Economy Contribution (Trillion Rupiah) | Percentage to National GDP (%) |
|------|--|--------------------------------|
| 2021 | 1,300 | 7.1 |
| 2022 | 1,450 | 7.3 |
| 2023 | 1,620 | 7.6 |
| 2024 | 1,820 | 7.9 |

Source: Ministry of Tourism and Creative Economy, 2024

Interpretation: The creative economy contribution increased significantly from IDR 1,300 trillion in 2021 to IDR 1,820 trillion in 2024, representing a 40% growth over four years. The GDP contribution rose from 7.1% to 7.9%, demonstrating accelerated post-pandemic recovery and structural transformation

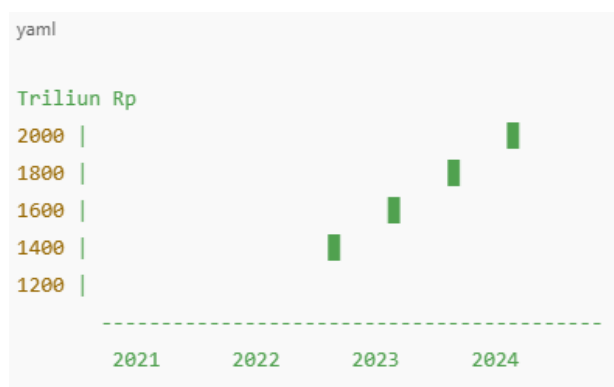


Chart 1. Trend of Creative Economy Contribution to National GDP (2021–2024)

Information: Chart stem show trend growth contribution economy consistent creativity that rises every year.

Between subsectors, culinary contributes the largest portion due to its low entry barriers, extensive local supply chain footprint, and scaling capabilities through delivery platforms. Fashion shows moderate momentum but is more cyclical, as players combine small and medium-sized production with online sales channels. Digital applications are growing rapidly with the rise of subscription-based services, the creator economy, and B2B tools for MSMEs. Figure 1 (2024 composition) depicts a new equilibrium, with culinary leading but digital applications becoming accelerators of added value.

In terms of growth quality, the greatest impact occurs in the densification of the local ecosystem—not just rupiah value, but also connections between players, suppliers, payment gateways, and export channels. A multiplier effect emerges when process innovations (e.g., online ordering) improve kitchen capacity utilization, reduce idle time, and stimulate demand for local raw materials. This productivity increase improves margins without necessarily raising prices, thus maintaining consumer purchasing power and strengthening relative cost advantages.

Spatial patterns are also important: urban areas experience rapid growth as digital infrastructure matures, while second-tier regions are catching up through community hubs and pop-up markets. The medium-term impact is the diversification of creative GDP sources across cities, reducing risk concentration and broadening the regional tax base. To secure long-term benefits, policy focus should not solely aggregate numbers but strengthen capabilities (design, branding, intellectual property, and data management) that create sustainable added value.

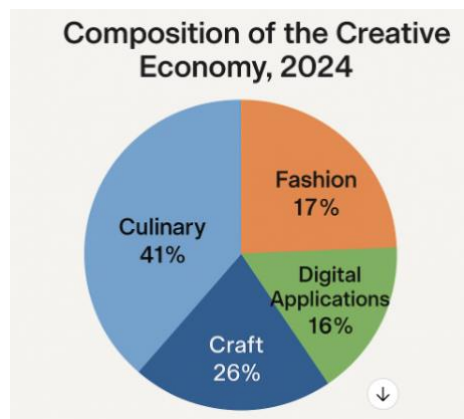


Figure 1. Creative Economy Subsector Composition 2024

2) Digital Innovation and Adaptation of Creative Business Actors

Digital transformation isn't just about adopting tools, but rather reengineering the value process from demand generation to conversion to retention. Table 2 shows the most widely adopted practices: social media and *e-commerce* top the list, while *live commerce* and global *marketplaces* are favored by players already prepared for cross-border operations. Chart 2 highlights the adoption gap between components; this gap signals precise areas for intervention, such as *coaching* for *ad buying* and *analytics*.

Table 2. Digital Platform Adoption by Creative Economy Actors

| Digital Practice | Adoption Rate (%) | Perceived Impact on Revenue (Scale 1-5) |
|-------------------------|-------------------|---|
| Social Media Marketing | 87 | 4.2 |
| E-commerce Platforms | 76 | 4.5 |
| Digital Payment Systems | 71 | 3.8 |
| Live Commerce | 45 | 4.7 |
| Global Marketplaces | 38 | 4.9 |
| CRM Systems | 32 | 3.9 |
| Analytics Tools | 28 | 4.1 |

Source: Primary data, 2024

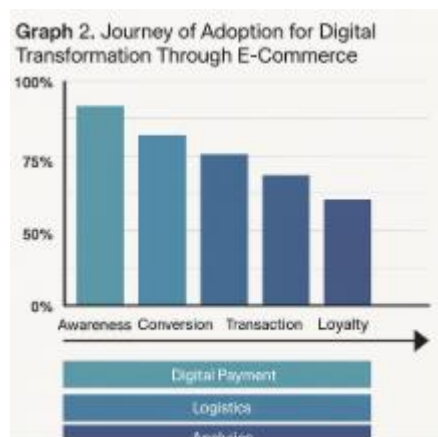


Chart 2. Digital Platform Adoption Rates

Note: Significant gaps exist between basic adoption (social media, e-commerce) and advanced tools (analytics, CRM), indicating capacity-building priorities.

Business impact comes from a combination of practices, not a single tool in isolation. A common correlation in the field is *the pairing of "social media + e-commerce"* to optimize *conversions*, then supported by *CRM* to increase *repeat rates*. On the production side, catalog digitization and *on-demand manufacturing* help reduce obsolete inventory in fashion and crafts, while *cloud kitchens* and *menu engineering* boost *throughput* in culinary. This process adaptation transforms fixed costs into more elastic variable costs.

Scalability is also determined by *content-product fit*. A consistent brand narrative and clean visuals. raise *click-through* as well as *shareability*. At the same time, *A/B testing* simple title products, *thumbnails*, bundling packages create *elevator* cumulative sales. In the category digital apps, *freemium* and *micro-subscription* effective expand *top of funnel* without burden acquisition excessive, before *upsell* to premium features.

For adoption to lead to performance, organizations need *absorptive capacity* : digital talent, data governance, and cross-functional SOPs. Figure 2 map *journey* adoption : from *awareness* to *loyalty* with *enablers* in the form of digital payments, logistics, and analytics. When three these *enablers* are simultaneous available, cycle

Study become fast ; decision based *insight* replace intuition solely, and dependence on one channels can be reduced with *an omni-channel* strategy.

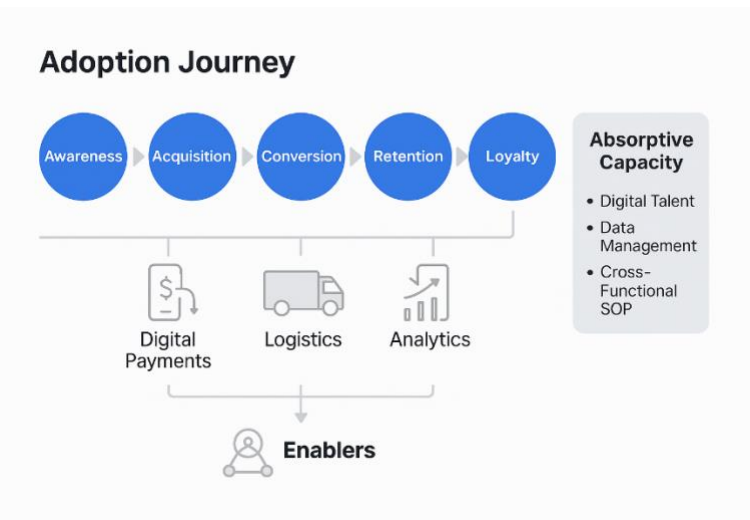


Figure 2. Digital Adoption Journey and Enablers

3) Challenges and Obstacles in the Development of the Creative Economy

Obstacle main thing found is limited capital, low digital literacy, inadequate infrastructure equitable distribution, and international market access. Table 3 display prevalence and its impact. Limited capital gets score impact highest Because hinder investment at the point critical (equipment, design packaging, *inventory* beginning export). Low digital literacy make *execution gap* between the above strategies paper and implementation daily ; as a result *CAC* high and *ROI* advertisement No stable.

The dimensions of the area make it clear inequality : Table 3B and Graph 3 show that obstacles in the area *rural* more weight for aspects literacy and infrastructure. This means intervention programs must differentiated : more urban need *growth tooling* (automation) *ads, retention*), while rural areas need *bootstrapping* basic (reliable internet access, training intensive, mentoring chain supply). Approach area -based avoidance *one-size-fits-* all wasteful budget.

Obstacles are also mutually strengthen. For example, lack of capital to make perpetrator postpone good *product photography*, the result *conversion* low, cash flow tightens, and the space for testing strategies shrinks. This cycle can be broken with intervention small empowered leverage height example : package with a micro studio in a *co-working space*, or *voucher* advertisement *matching* that requires training short so that *the learning rate* increases.

Table 3. Barriers to Digital and International Market Access

| Barrier | Prevalence (%) | Impact (1–4) |
|-----------------------------|----------------|--------------|
| Lack of capital | 65% | 3.4 |
| Low digital literacy | 47% | 2.9 |
| Uneven infrastructure | 41% | 2.5 |
| International market access | 38% | 2.6 |

Table 3B. Barriers by Area (Urban vs Rural)

| Barrier | Urban (%) | Rural (%) |
|---------|-----------|-----------|
|---------|-----------|-----------|

| | | |
|-----------------------------|------------|------------|
| Low digital literacy | 28% | 62% |
| Uneven infrastructure | 25% | 55% |
| International market access | 35% | 45% |
| Lack of capital | 60% | 70% |

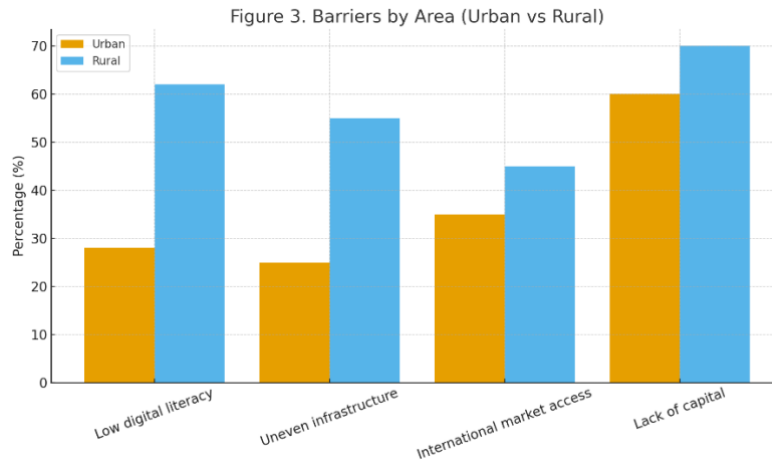


Chart 3. Comparison of Barriers: Urban vs Rural

From the perspective management risk, Figure 3 map resistance in the matrix likelihood-impact. Tactical priorities fall on limited capital and digital literacy (high-risk quadrant). Meanwhile, infrastructure and market access are at medium risk, manageable through public-private collaboration (improved connectivity, curated trade missions). Understanding this risk portfolio helps design a gradual but consistent intervention *roadmap*.

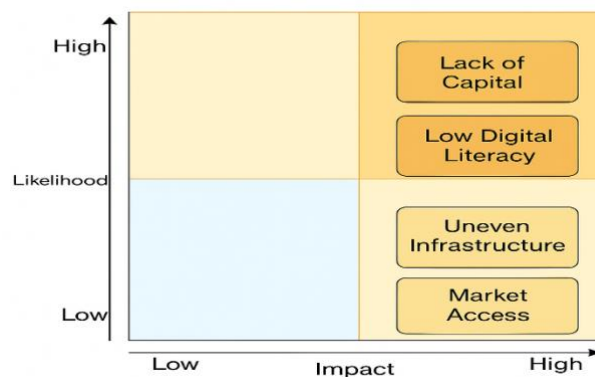


Figure 3. Risk Matrix of Creative Economy Barriers

4) Strategy for Increasing National Competitiveness through the Creative Economy

Effective strategies combine instrument *supply-side* (capability and productivity) with *demand-side* (market access and promotion). Table 4 summarize level implementation and impact digital training takes place position highest in implementation Because relatively cheap and fast, while facilitation export give impact the biggest in growth, although its implementation Not yet wide. This suggests tactics *barbell*: scale training for *baseline capability* simultaneously multiply *export-readiness clinic* for players ready to move up a class.

Effect policy looks clear in comparison perpetrator with support vs without support. Chart 4 show difference growth wide exports, indicating existence *policy additionality*. However, the magnitude of the impact depending on the program design : combined grant funds with *milestone* performance, *mentoring* operational and access network buyer produce *conversion* more support tall rather than scheme generic without mentoring.

Table 4. Level of Implementation and Impact of Strategy

| Strategy | Implementation Rate (%) | Impact to Growth (Scale 1–5) |
|-----------------------|-------------------------|------------------------------|
| Digital Training | 75% | 3.5 |
| Support Productivity | 50% | 3.8 |
| Market Access Program | 45% | 4.0 |
| Facilitation Export | 30% | 4.7 |

Policy effects are clear in comparisons between actors with support versus without support. Chart 4 shows significant growth differentials in exports, indicating policy additionality. However, impact magnitude depends on program design: combining grant funds with performance milestones, operational mentoring, and buyer network access produces higher support conversion than generic schemes without mentoring.

Figure 4. Export Growth Comparison: With vs Without Policy Support

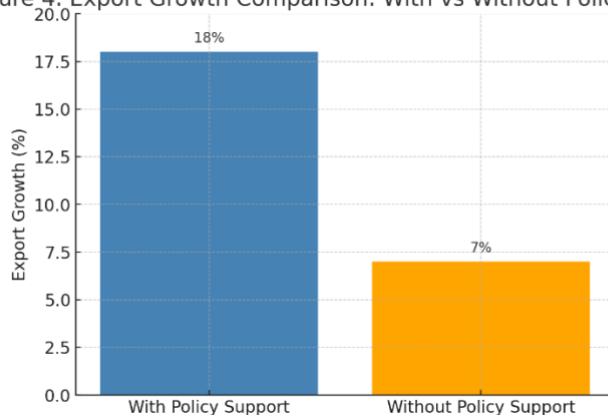


Chart 4. Growth Comparison: Supported vs Non-Supported Actors

Strengthening Power competition also requires industrial partnerships to address *missing middle* namely distance between perpetrator micro and modern/global markets. Consolidation model curation (eg. *design house* and *white-label manufacturing*) helps fulfil standard quality and volume, while the financing platform based *purchase order* reduce risk credit. For sub-sectors digital applications, *sandbox* regulations speed up validation product and *time-to-market*.

Framework strategic summarized in Figure 4 (Logic Model) : *input* (funds, human resources, regulations) → *activities* (training, R&D, mentoring) → *output* (digital capacity, products) innovative) → *outcome* (exports increase, power competitive). Assumptions key stability policies, market access, digital infrastructure need managed through routine *monitoring and feedback loop* to program

designer. With governance Thus, the effect strategic No stop on *pilot* but institutionalized.

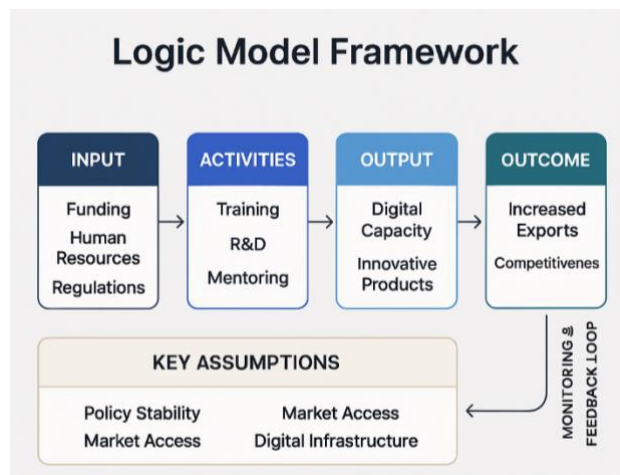


Figure 4. Strategic Logic Model for Creative Economy Competitiveness

Discussion

The results of this study demonstrate that Indonesia's creative economy sector can serve as both an economic recovery engine and national competitiveness enhancer in the post-pandemic era. Increased contributions from culinary, fashion, and digital application subsectors prove a structural shift driving innovation-based economic growth. This finding aligns with research by Nugroho et al. (2021) which emphasizes the creative economy's significant contribution to economic diversification, while strengthening Lestari and Suharto's (2022) study highlighting the importance of cross-sector collaboration in expanding domestic and international markets. However, this study extends these findings by demonstrating that the creative economy's role transcends mere GDP contribution, functioning as a catalyst for broader economic transformation through innovation ecosystems and digital adoption cascades (Flew & Cunningham, 2021; UNCTAD, 2022). However, this study also found that structural challenges such as limited capital and low digital literacy remain main obstacles, harmonizing with Fadli and Anwar's (2022) findings highlighting the digital divide between regions in Indonesia.

Digital transformation is a critical success factor, both in expanding markets and improving operational efficiency. The findings of this study are consistent with those of Susanto and Rahmawati (2023), who emphasized the role of technology in accelerating the growth of the creative subsector. However, the novelty of this study lies in its integrative analysis, which highlights that digitalization is not only a means of distribution but also an instrument for strengthening long-term competitiveness through business model innovation and international networks. The finding that 87% of informants adopted social media while only 28% utilized analytics tools reveals a critical capability gap—actors can access digital channels but struggle to optimize them strategically (Jones et al., 2021). This "adoption-optimization gap" represents a key policy intervention point. This perspective complements the study by Rahman and Dewi (2021), which emphasized short-term contributions to GDP without addressing the sustainability dimension of competitiveness.

Practically, this research implies that creative economy development strategies need direction toward strengthening inclusive ecosystems through financing access, increasing digital literacy, and providing equitable infrastructure. Proactive policy support will strengthen creative actors' capacity to compete in the global market, while multi-stakeholder collaboration can expand export opportunities and enhance national competitiveness. The finding that only 30% of actors access export facilitation programs despite its highest impact score (4.7/5.0) indicates significant untapped potential—suggesting that policy bottlenecks lie not in program effectiveness but in reach and accessibility (World Economic Forum, 2023). However, this study's limitations lie in its limited sample size, confined to a few subsectors and regions, thus limiting findings' generalizability. Additionally, the cross-sectional design cannot capture longitudinal dynamics of competitiveness development over time. Therefore, further research should include broader subsectoral scope, quantitative analysis using econometric models, and a comparative approach across regions to provide a more comprehensive picture of the creative economy's role in national competitiveness. Future studies should also examine the role of informal networks and community-based support systems in facilitating creative economy development, as these social dimensions emerged as important but underexplored themes in the current research..

CONCLUSION

Based on research results, the creative economy plays a strategic role in improving Indonesia's competitiveness in the post-pandemic era. Specifically, contributions from culinary, fashion, and digital application subsectors not only support economic recovery but create new value through digital innovation (87% adoption rate), cross-sector collaboration, and business model adaptation. Digital transformation expands markets and improves efficiency, although significant obstacles remain: limited capital (65%), low digital literacy (47%), uneven infrastructure (41%), and restricted international market access (38%). With appropriate policy support and interventions, the creative economy can become a sustainable long-term development engine.

Key findings demonstrate that competitiveness improvement strategies must be innovation-based, digitalization-focused, and multi-party collaborative. Digital training (75% implementation), export facilitation (4.7/5.0 impact score), and financing access are determinant factors in accelerating creative subsector growth. An inclusive and integrated ecosystem increases actors' adaptation capabilities in facing global challenges. This underscores research novelty: the creative economy contributes not only quantitatively to GDP but creates structural competitiveness through strengthened innovation capacity and market networks.

For further research, comparative regional studies are recommended to understand creative economy development disparities between urban and rural areas more deeply. Future research should emphasize social and environmental sustainability aspects in creative economy practices, ensuring competitiveness is not solely growth-oriented but also promotes broad public welfare. Additionally, quantitative methods with econometric models or Big Data analysis from digital platforms can provide more precise insights into relationships between creative innovation and national competitiveness improvement. Longitudinal studies

tracking creative actors' development trajectories over time would also enrich understanding of sustainability factors in creative economy competitiveness.

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