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A Century of Muhammadiyah, Research Trends on Muhammadiyah's Charitable Activities: Bibliometric Analysis

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Abstract

The creative economy has become a strategic pillar of Indonesia's national development, contributing approximately IDR 1,389 Quadrillion Rupiah to GDP in 2024 at current prices and employing more than 24 million workers, based on data from Statistics Indonesia and the Ministry of Tourism and Creative Economy. Using the national classification of creative economy subsectors, this study analyzes development trends, projects future growth toward the Golden Indonesia 2045 agenda, and evaluates strategic positioning through a SWOT framework. This research adopts a descriptive quantitative secondary-data design using time-series data from 2010-2024 derived from Statistics Indonesia, the Ministry of Tourism and Creative Economy, and national planning documents. Analytical techniques include descriptive statistics, trend and projection modeling, and an integrated SWOT analysis linking sectoral indicators with long-term policy targets. The study's novelty lies in combining projection modeling with subsectoral analysis and aligning strategic evaluation with national development goals. The findings indicate sustained growth with the potential for the creative economy to contribute around 10% of national GDP by 2045. However, challenges remain in financing access, digital infrastructure, and intellectual property governance, highlighting the need for cross-sectoral collaborative policy strategies.

KEYWORDS

creative economy; swot analysis; golden indonesia 2045.

Introduction

The creative economy has become an important focus in global economic and development discourse due to its measurable contribution to innovation, employment, and value creation. Conceptually, the creative economy refers to the production of goods and services derived from creativity, skills, and individual talent protected by intellectual property rights (Howkins, 2021). However, empirical studies in Indonesia often apply varying definitions, creating inconsistencies when analyzing subsector performance and national statistics. To ensure construct validity, this study adopts Indonesia's official classification of creative economy subsectors used by Statistics Indonesia and the Ministry of Tourism and Creative Economy. Within this context, existing Indonesian research has largely emphasized descriptive reporting, while relatively few studies integrate long-term time-series analysis, growth projection, and strategic evaluation in a unified framework, highlighting a gap that this study seeks to address. This concept integrates industries operating in the fields of art, design, technology, media, entertainment, and other innovations that can create added value from creative ideas. Globally, the creative economy has expanded significantly, with evidence showing its increasing contribution to national GDP and employment across many developed countries (De Beukelaer, 2014; Goya, 2024; Kern & Runge, 2009). The emphasis on creativity and innovation makes the creative economy more dynamic and adaptive to technological changes and evolving market preferences (World Bank, 2020).

According to UNESCO (O'Connor, 2023), countries that have successfully developed their creative economy sectors, such as the United Kingdom and South Korea, have shown that this sector not only increases GDP but also generates significant employment opportunities and supports sustainable economic development (Sabry Ahmed Ibrahim, 2023). One of the main advantages of the creative economy is its ability to create non-material added value that heavily relies on ideas and imagination. This sector is also quickly adaptable to global environmental changes, both socially and economically. Therefore, the creative economy has shown signs of relative resilience during recent economic disruptions, with digitally driven subsectors maintaining production and employment levels more consistently than sectors heavily reliant on physical infrastructure, such as manufacturing and trade (Creative Economy Outlook 2024)

In Indonesia, the development of the creative economy has become a strategic government agenda for achieving national development goals. According to a report by Bappenas (2023), the creative economy sector contributed around 7.8% to Indonesia's GDP in 2022, with the culinary, fashion, and craft subsectors being the largest contributors. Additionally, the sector employed more than 23 million workers, accounting for approximately 17% of the total Indonesian workforce (Kemenparekraf, 2023; Kreatif, 2021). This great potential makes the creative economy highly relevant in Indonesia's efforts to transform into a developed nation by 2045, with a per capita GDP target of USD 23,000 and positioning Indonesia among the top five global economies (Bappenas, 2023)

However, despite its significant potential, Indonesia's creative economy continues to face structural challenges related to financing access, uneven digital infrastructure, and intellectual property protection. While these issues are widely acknowledged in existing literature, empirical research rarely examines how such constraints influence long-term sectoral growth, subsector performance, and policy prioritization within an integrated analytical framework. This gap limits evidence-based decision-making regarding which constraints most strongly shape the sector's future trajectory. To address this limitation, the present study combines time-series analysis, growth projection, and strategic evaluation to assess how structural challenges interact with development trends and inform policy direction. Limited access to affordable and accessible financing remains a primary obstacle for many creative MSMEs, most of which operate without adequate access to financial resources Ministry of Tourism and Creative Economy (2020). Furthermore, although digitalization has progressed, there are still gaps in digital infrastructure between urban and rural areas, hampering creative economy development in certain regions (Indria Desy Rachmawati et al., 2025). Another equally important challenge is the low level of digital and managerial literacy among creative economy players, limiting their potential to compete in the global market (UNDP, 2024).

The importance of government policies in supporting the creative economy sector has been recognized by various studies. The G20 (2022) report emphasizes that adaptive regulations and cross-sectoral policies are crucial to building an ecosystem that supports the development of the creative economy, especially in developing countries. In Indonesia, the government has issued various policies to strengthen this sector, such as Law of the Republic of Indonesia No. 24 of (2019) on Creative Economy, which provides a legal foundation for the sector to grow in an organized and sustainable manner. In addition, the National Creative Economy Roadmap 2025-2045 serves as a vital framework for guiding sector development through strategies in innovation, financing, and digitalization (Kemenparekraf, 2021a; N, 2017).

The creative economy also plays a significant role in achieving the Sustainable Development Goals (SDGs). In this context, the creative economy contributes to the creation of decent work (Goal 8), promotes innovation (Goal 9), and supports sustainable cities (Goal 11) (Bappenas, 2023). A study by the Ministry of Tourism and Creative Economy (Kemenparekraf, 2021a) highlights the important role of women in the culinary and craft subsectors, contributing to community-based economic empowerment. Furthermore, the sector also opens opportunities for vulnerable groups, such as persons with disabilities, to participate in the creative economy, thus promoting greater social inclusion (Perlambang et al., 2025).

On the other hand, the role of digital technology in the development of the creative economy is becoming increasingly important, in line with the rapid growth of Indonesia's digital economy (Kumala, 2022; Ortiz-Ospino et al., 2025). World Economic Forum (2019) note that subsectors such as apps, games, and music have grown significantly thanks to improving digital infrastructure, particularly in the e-commerce and tech startup markets. Digitalization enables creative economy players to reach wider markets, including international ones, unbound by time and geographical constraints (Meliawati et al., 2025; Poutanen et al., 2019). Technology-based innovations also create opportunities for creative industry players to develop more appealing, efficient, and market-relevant products and services.

Beyond its economic contribution, the creative economy also functions as a catalyst for regional development and cultural preservation (Masri, 2025). Creative activities are often deeply rooted in local traditions, heritage, and local knowledge, enabling regions to transform cultural assets into sustainable economic value without losing their cultural identity(Romadhan & Yuliani, 2025). In the Indonesian context, subsectors such as culinary, crafts, and traditional fashion not only generate income but also strengthen local economic structures and cultural ecosystems (Hasirah et al., 2025a). This characteristic makes the creative economy particularly relevant for reducing regional disparities and encouraging inclusive development across both urban and non-urban areas (Mahmuddin et al., 2024a; Sumar'in et al., 2017).

In addition, the creative economy demonstrates strong interconnections with other economic sectors, including tourism, manufacturing, education, and digital services (Hasirah et al., 2025). The integration of creative industries with tourism enhances destination attractiveness while extending value chains for local creative products and services (Mahmuddin et al., 2024). Collaboration with the education sector also plays a crucial role in developing creative human capital, fostering innovation, and strengthening entrepreneurial capacity. These cross-sector linkages amplify the multiplier effect of the creative economy and position it as a strategic driver of economic transformation (Rosidanti Susilatun et al., 2023; Sudiarti et al., 2025).

From a resilience perspective, the creative economy has shown a high degree of adaptability in the face of economic uncertainty and structural change. Creative industries tend to rely more on intellectual capital, flexibility, and innovation rather than heavy physical infrastructure, allowing them to respond more rapidly to market dynamics and technological shifts (Dellyana et al., 2023; Kurnianingsih, 2025). Digital-based creative subsectors, such as content creation, design, music, and games, have continued to expand alongside the growth of the digital economy, reinforcing the sector's role in job creation and income diversification.

However, to fully realize these advantages, the development of the creative economy must be supported by a strong and integrated ecosystem. Effective coordination between government institutions, the private sector, educational institutions, and creative communities is essential

to ensure that policies, programs, and resources are aligned. Without such coordination, disparities in access to skills development, financing, and market opportunities may persist, limiting the sector's overall contribution to national development. Therefore, an ecosystem-based approach that emphasizes collaboration, capacity building, and equitable access is critical for strengthening the sustainability and competitiveness of the creative economy.

The creative economy holds tremendous potential in driving economic growth, creating jobs, and enhancing Indonesia's global competitiveness. However, realizing this potential requires supportive policies, adequate infrastructure, and the strengthening of creative economy actors' capacities in terms of digitalization and management. With the right approach, the creative economy can become one of the main pillars in achieving the Vision of Golden Indonesia 2045.

Methods

This study adopts a descriptive quantitative (Sugiyono, 2017) secondary-data approach using a desk-study design based on national statistical datasets and official policy documents. The analysis draws on time-series indicators of Indonesia's creative economy from 2014-2023 obtained from Statistics Indonesia, the Ministry of Tourism and Creative Economy, and national development planning reports. Sectoral projections toward 2045 are conducted using trend-based time-series modeling that extrapolates historical growth patterns under baseline assumptions of stable macroeconomic conditions, digital expansion, and continued policy support for creative subsectors.

To ensure policy relevance, the study applies a policy analysis framework that links empirical sector performance with national development targets outlined in long-term planning documents, including the Golden Indonesia 2045 agenda. Within this framework, descriptive statistics are used to examine subsector dynamics, projection results are interpreted to estimate potential GDP and employment contributions, and an integrated SWOT analysis is employed to evaluate strategic policy priorities. Through this approach, the research generates evidence-based strategic recommendations grounded in quantitative trends, projection scenarios, and national policy direction.

The data used in this study consist of secondary data obtained from credible and authoritative institutions. The main data sources include Statistics Indonesia (BPS), which provides data on gross domestic product by industry, creative economy subsectors, geographical distribution, and employment statistics; the Ministry of Tourism and Creative Economy, which publishes annual creative economy reports, the Regional Creative Economy Index, and maps of priority subsectors; and the National Development Planning Agency (Bappenas), through key planning documents such as the Vision of Indonesia 2045, the National Long-Term Development Plan 2025-2045, and the National Medium-Term Development Plan. In addition, Scopus-indexed scientific journals are utilized to strengthen the literature review and conceptual framework.

Data collection is conducted through documentary analysis, involving the systematic collection, review, and organization of official documents, statistical reports, government publications, and relevant academic articles. Digital data are accessed through official institutional websites, including bps.go.id, parekraf.go.id, and bappenas.go.id. Data analysis is carried out using descriptive statistical techniques to present quantitative data in the form of tables, trend graphs, and numerical summaries, particularly with respect to the contribution of the creative economy to gross domestic product, employment absorption, and export performance. The analysis also includes the calculation of the Compound Annual Growth Rate (CAGR) to identify long-term trends and projections toward 2045 (Fernando, 2024). Additionally, a SWOT analysis is applied to examine internal and external factors influencing the creative economy sector, encompassing strengths, weaknesses, opportunities, and threats related to human resources, technological capacity, regulatory frameworks, global market dynamics, and digitalization.

Population and Units of Analysis

This study does not involve human participants as primary respondents; therefore, it does not employ a population and sample in the conventional survey-based sense. Instead, the units of analysis consist of documents, datasets, and statistical records related to Indonesia's creative economy sector. The population of this study includes all officially published secondary data concerning creative economy performance, subsector development, employment, and policy frameworks in Indonesia during the period 2015-2024. The analytical sample was selected using purposive document sampling, focusing on datasets and policy documents that are relevant, credible, and directly aligned with the research objectives. These include national statistical reports, sectoral reports, development planning documents, and peer-reviewed journal articles that provide empirical and conceptual insights into the creative economy and its role in achieving the Vision of Golden Indonesia 2045.

Research Location

The research is national in scope, covering Indonesia as a whole. However, spatial analysis is conducted using regional and provincial data to capture geographical variations in creative economy performance. This national-level focus is essential to understanding structural patterns, regional disparities, and strategic policy implications related to creative economy development across Indonesia, particularly in the context of long-term national development planning toward 2045.

Research Instruments

As a secondary data-based study, the primary research instruments consist of document review matrices and data extraction templates developed by the researchers. These instruments were used to systematically record, categorize, and synthesize quantitative indicators such as creative economy contribution to gross domestic product, employment absorption, export performance, and subsector distribution. In addition, an analytical framework based on descriptive statistical indicators and SWOT dimensions was employed to ensure consistency and rigor in data interpretation across multiple sources.

Data Collection Procedures

Data collection was conducted through systematic documentary analysis. Official statistical data and reports were collected from the websites of Statistics Indonesia, the Ministry of Tourism and Creative Economy, and the National Development Planning Agency. Academic literature was accessed through Scopus-indexed journals and reputable international publications. The data collection process involved identifying relevant documents, verifying their credibility, extracting key variables, and organizing the data into structured datasets for further analysis. Only the most recent and methodologically sound publications were included to ensure data reliability and relevance.

Data Analysis

Data analysis was conducted using descriptive statistical analysis combined with policy document analysis to ensure both

empirical and strategic interpretation. Quantitative indicators were analyzed to identify trends, growth patterns, and the structural contribution of the creative economy to national economic performance across subsectors. Policy documents were examined using structured content analysis to identify priority themes, policy instruments, and development targets, with coding procedures applied to enhance analytical consistency and reliability. Long-term projections toward 2045 were generated using time-series trend extrapolation based on historical data from 2014-2023. Growth rates and the Compound Annual Growth Rate (CAGR) were calculated using the standard formula CAGR = (Ending Value/Beginning Value)1/n-1, which was then applied to estimate future sector contributions under a baseline scenario assuming relatively stable growth conditions. To account for potential disruptions, projection interpretation incorporates sensitivity considerations by comparing pre- and post-shock periods (e.g., pandemic years) rather than assuming uninterrupted linear growth. This approach allows projections to function as indicative scenarios that inform strategic policy evaluation rather than deterministic forecasts. In addition, a SWOT analysis was applied to synthesize internal strengths and weaknesses as well as external opportunities and threats affecting Indonesia's creative economy. This integrative analysis enabled the formulation of evidence-based policy insights by linking empirical trends with regulatory frameworks, technological development, and global market dynamics.

Ethical Considerations

This study exclusively utilizes publicly available secondary data and official documents; therefore, ethical clearance involving human subjects was not required. Nevertheless, ethical research principles were upheld by ensuring accurate citation, transparent data usage, and responsible interpretation of all sources. All data were used solely for academic and policy analysis purposes, and intellectual property rights were fully respected.

Result and Discussion

The Development of Indonesia's Creative Economy

The creative economy in Indonesia has experienced sustained growth and has become an important contributor to Gross Domestic Product (GDP). Based on Table 1, the sector's value increased from IDR 525 trillion in 2010 to approximately IDR 1,389 trillion in 2024, indicating more than a twofold expansion over the period. This upward trend reflects the strengthening role of creativity-based activities in the national economic structure and supports the view that the creative economy has evolved into a strategic development sector. Rather than reporting the value as "quadrillion rupiah," the 2024 figure represents IDR 1,389 trillion, which corresponds to roughly 6–8% of national GDP, depending on the price basis used.

The data also reveal a relatively stable growth trajectory, with a temporary slowdown in 2020 that corresponds to global economic disruption during the pandemic, followed by recovery and continued expansion through 2024. This pattern highlights the sector's adaptive capacity, particularly in subsectors that benefit from digitalization and flexible production models. The creative economy encompasses a range of subsectors including culinary, fashion, crafts, film, music, and design that generate both economic value and cultural expression. These subsectors not only contribute to output and employment but also support the preservation and commercialization of Indonesia's cultural heritage.

The increasing contribution of the creative economy underscores the importance of innovation and intellectual value creation in modern economic development. As demand for distinctive and culturally embedded products grows in international markets, Indonesia's creative industries demonstrate competitive advantages derived from local knowledge, design, and storytelling. The consistent rise from IDR 1,280 trillion in 2022 to IDR 1,389 trillion in 2024 further confirms that the sector's expansion is structural rather than cyclical.

Within the sector, culinary, fashion, and craft subsectors remain dominant contributors, largely driven by micro, small, and medium enterprises that generate widespread employment opportunities. Beyond economic output, creative activities function as mechanisms for cultural transmission and identity formation, enabling local traditions to be translated into marketable products. This dual economic-cultural role reinforces the sector's strategic relevance in inclusive development agendas.

Recognizing this potential, the government has positioned the creative economy as a key pillar in long-term development planning, including the roadmap toward the Vision of Golden Indonesia 2045. Policy priorities focus on strengthening creative human capital, expanding digital infrastructure, improving financing access, and enhancing intellectual property protection. These initiatives aim to build an ecosystem that enables sustainable growth and global competitiveness.

Furthermore, the global appeal of Indonesia's creative products continues to increase as international consumers value authenticity, cultural narratives, and sustainability. Consequently, the development of the creative economy serves not only as an economic growth engine but also as an instrument of cultural diplomacy that enhances Indonesia's global positioning. Strengthening institutional coordination, improving capacity building, and expanding market access remain critical to ensuring that the sector's positive growth trajectory translates into long-term structural transformation.

Dominance of Creative Economy Subsectors

Among the various subsectors, culinary, fashion, and crafts dominate the contribution to Indonesia's creative economy. Indonesian culinary arts are renowned for their diversity and serve as a major attraction in both domestic and international markets. Indonesian fashion, with its distinctive designs and use of local materials, is also increasingly gaining popularity in global markets and has even become part of international fashion trends. Meanwhile, the crafts (kriya) subsector draws on local skills and traditional materials, reflecting the richness of Indonesia's cultural heritage.

The success of these subsectors in dominating the creative economy has contributed to enhancing Indonesia's competitiveness in international markets. Further development in design, product quality, and more targeted marketing strategies can elevate Indonesia's position in the global creative economy.

Table 1. GDP Value of Indonesia's Creative Economy from 2010 to 2022

Tahun	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Rupiah	525 T	581 T	638 T	708 T	784 T	852 T	923 T	989 T	1,070 T	1,150 T	1,130 T	1,190 T	1,280 T	1,347 T	1,389 T

Source: Kemenparekraf, 2011-2024 processed (Kemenparekraf, 2021)



Figure 1. Employment Growth in Culinary, Fashion, and Craft Subsectors in Indonesia (in millions), 2018-2022

Source: BPS, Sakernas 2018-2022 (BPS dan Kemenparekraf, 2022)

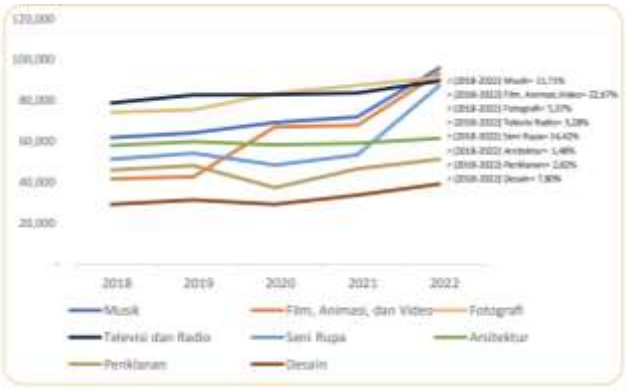


Figure 2. Employment Growth in Other Creative Economy Subsectors[1] in Indonesia (thousands of people), 2018–2022

Source: BPS, Sakernas 2018-2022 (BPS dan Kemenparekraf, 2022)

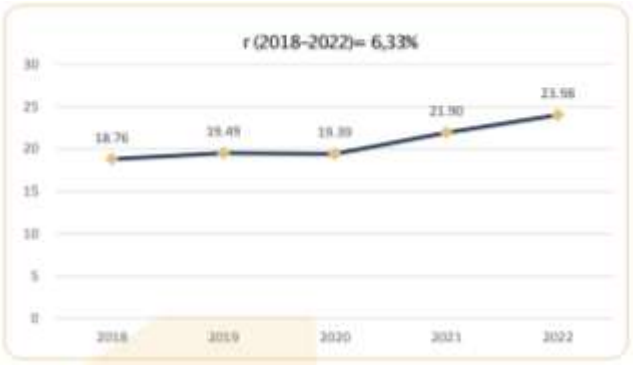


Figure 3

Source: BPS, Sakernas 2018-2022 (BPS dan Kemenparekraf, 2022)

If 2018 is used as the baseline year of observation, among the three creative economy subsectors with the highest number of workers, only the culinary subsector consistently showed a steady growth trend in employment through to 2022. In contrast, the Craft and Fashion subsectors experienced an increase in employment from 2018 to 2019, followed by a decline in 2020, before rebounding and showing an upward trend again through 2022. Overall, during the period of 2018–2022, all three subsectors recorded positive employment growth, with the culinary subsector growing at an average annual rate of 9.92%, Fashion at 3.82%, and Craft at 0.23%.

The Role of the Creative Economy in Job Creation

In Figure 1 the creative economy sector has generated over 23 million jobs in Indonesia, equivalent to approximately 17% of the total Indonesian workforce. Most of these jobs are created for MSMEs and micro-entrepreneurs engaged in smaller subsectors such as handicrafts, music, and digital applications. The creative economy also provides opportunities for vulnerable groups, including women and people with disabilities, to participate in economic activities.

The role of this sector in job creation is highly significant, especially considering that unemployment remains a key issue in Indonesia. With the increasing involvement of MSMEs in the creative economy sector, the government is expected to strengthen their access to financing, skill development, and broader markets to create more jobs and reduce economic disparities across regions.

The employment analysis applies a trend-based descriptive statistical approach using Sakernas microdata to identify sectoral labor absorption patterns, demographic composition, and annual growth rates. This procedure allows the study to interpret employment dynamics as empirical findings rather than general sectoral descriptions. Based on data from the National Labor Force Survey (Sakernas) from 2018-2022, employment in the creative economy showed a positive trend, with an average annual growth rate of 6.33%. In 2022, the share of creative economy employment reached 17.73%, meaning that out of every 100 workers, around 18 were employed in the creative economy sector. Among the fourteen creative economy subsectors, the culinary subsector absorbed the most labor, accounting for 56.02%, while the design subsector absorbed the least, at only 0.16%.

In terms of age demographics, 38.49% of creative economy workers were aged 25–40 years, around 35.19% were aged 41-59 years, 17.21% were aged 15-24 years, and approximately 9.10% were aged 60 and over. Most workers in the creative economy belonged to the millennial generation (38.51%), followed by Generation X (31.02%), Generation Z (18.77%), Baby Boomers (11.05%), and Pre-Boomers (0.65%).

When viewed by educational attainment, the majority of creative economy workers had a low education level (junior high school or lower) at 53.24%, while 39.09% had a medium level (senior high school or equivalent), and only 7.67% had a higher education level (diploma or above). Although this last group represented the smallest share, the proportion of highly educated workers in the creative economy consistently increased throughout the 2018–2022 period. According to Sakernas data from 2018 to 2022, the number of creative economy workers steadily increased, from 18.76 million in 2018 to 23.98 million in 2022 as shown in Figure 3.

Growth Trends of the Creative Economy Sector

The Compound Annual Growth Rate (CAGR) is a method used to calculate the average annual growth rate of a value over a specific period, assuming constant growth each year. In Figure 2, CAGR provides a more accurate picture of growth trends compared to simply calculating the percentage difference between the starting and ending values.

In the context of Indonesia's creative economy sector, CAGR can be used to measure the annual growth rate of the sector's GDP contribution from 2010 to the estimated figure in 2024. This metric helps to better understand the long-term development and performance of the creative economy in a consistent and comparable way. To ensure analytical transparency, CAGR is calculated using constant price GDP values derived from official national statistics. The method standardizes year-to-year variation and enables comparison across periods, providing an empirical basis for interpreting long-term sectoral performance.

$$\text{CAGR} = \left(\frac{\text{Ending Value}}{\text{Beginning Value}} \right)^{\frac{1}{n}} - 1$$

Where the Ending Value is the value in the final year (2024), the Beginning Value is the value in the initial year (2010), and n is the number of years in the growth period (2024 - 2010 = 14 years). By inserting these numbers into the formula, the calculation becomes:

$$\text{CAGR} = \left(\frac{1.389}{525} \right)^{\frac{1}{14}} - 1 = (2.6457)^{0.0714} - 1$$

After calculation, the result is a CAGR of approximately 7.18% per year. This means that the GDP value of Indonesia's creative economy sector has grown at an average rate of 7.18% annually during the period from 2010 to 2024, indicating strong and stable growth in this sector.

This average annual growth rate of 7.18% highlights the role of the creative economy as one of the key pillars in Indonesia's economic development. In addition to making a significant contribution to the national GDP, this growth rate also reflects the vast potential for the development of creativity, innovation, and cultural preservation, which positively impacts the improvement of public welfare. Both the government and industry players are expected to continue fostering a supportive ecosystem to sustain this positive growth trend.



Figure 4. The Development of Indonesia's Creative Economy GDP Value, 2010–2024

The Gross Domestic Product (GDP) value of Indonesia's creative economy sector experienced significant growth from 2010 to 2024. In 2010, the sector's GDP was recorded at IDR 525 trillion and increased to IDR 1,389 trillion in 2024 as shown in Figure 4. This development indicates that the creative economy has become one of the main pillars of Indonesia's economy, especially in navigating the increasingly complex dynamics of the global economy (Kemenparekraf, 2024; BPS, 2024).

To measure the consistent annual growth rate over the 2010–2024 period, the Compound Annual Growth Rate (CAGR) method is used. CAGR reflects the average annual growth rate and illustrates the effective increase in the GDP value of the creative economy during those 14 years. The CAGR calculation from IDR 525 trillion in 2010 to IDR 1,389 trillion in 2024 results in a rate of 7.18% per year, indicating stable and sustainable growth (Damodaran, 2023; Investopedia, 2024).

This 7.18% average annual growth demonstrates optimism and the great potential of Indonesia's creative economy sector. Despite fluctuations in GDP values during certain years, the long-term trend remains positive. This success is not only driven by innovation and creativity, but also by supportive government policies and the increased capacity of human resources in the creative sector (Siregar et al., 2022; Utami, 2023).

The analysis of the growth chart shows that the GDP value of the creative economy follows an upward trend that closely aligns with the CAGR projection. Over the past 14 years, the sector has been able to maintain positive momentum despite global challenges, such as the COVID-19 pandemic which led to economic slowdown in 2020. Future projections indicate that the sector still holds substantial growth potential, which can be leveraged to promote more inclusive and sustainable national economic growth (World Bank, 2023; UNCTAD, 2024)

Key SWOT Factors Influencing Indonesia's Creative Economy Sector

Indonesia's creative economy sector has demonstrated substantial growth and has become an important contributor to Gross Domestic Product (GDP) and employment. In this study, the identification of strengths, weaknesses, opportunities, and threats (SWOT) was conducted through a systematic review of national statistics, policy documents, and sectoral reports published by Statistics Indonesia, the Ministry of Tourism and Creative Economy, and national development planning agencies. Factors were selected using criteria related to economic contribution, institutional support, market performance, and structural constraints. A document coding process was applied to categorize recurring themes across sources and to justify the inclusion of each factor. The analysis indicates that the sector's strengths are reflected in its strong cultural capital, policy support, and the dominant performance of the culinary, fashion, and craft subsectors. Conversely, weaknesses are associated with disparities in human capital quality, financing accessibility, and the effectiveness of intellectual property protection, which continue to shape the sector's development trajectory.

Opportunities and threats were derived using the same document-based coding procedure, focusing on external drivers identified across policy frameworks, industry outlook reports, and global creative economy analyses. Opportunities primarily relate to the acceleration of digital transformation, the expansion of global creative markets, increasing investment flows, and the integration of the creative economy within national development priorities toward the Vision of Golden Indonesia 2045. These factors were prioritized based on their frequency of appearance in policy discourse and their measurable relevance to sectoral growth indicators. Meanwhile, threats were identified through indicators associated with structural vulnerability, including unequal digital infrastructure, market competition from global platforms, regulatory fragmentation, and sensitivity to macroeconomic shocks. The structured selection process ensures that the SWOT matrix reflects empirically grounded and policy-relevant factors rather than descriptive generalizations.

On the other hand, Indonesia's creative economy holds great opportunities for growth through digitalization, expansion into global markets, and consumer trends that increasingly value cultural and sustainable products. The government has positioned this sector as a key pillar in Indonesia's long-term development vision. Nevertheless, the sector also faces threats such as intense global competition, rapidly changing market trends, and the risk of creative product piracy, which may reduce innovation incentives. Therefore, strengthening the ecosystem, improving the quality of human resources, and enhancing intellectual property rights protection are crucial to ensuring the sustainability of Indonesia's creative economy.

The figure 5 presents a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis of Indonesia's creative economy sector. In terms of Strengths, the sector demonstrates stable growth with a significant contribution to the national GDP. Sub-sectors such as culinary, fashion, and crafts dominate due to their strong cultural appeal. Government support and the provision of employment

opportunities for vulnerable groups also serve as key strengths

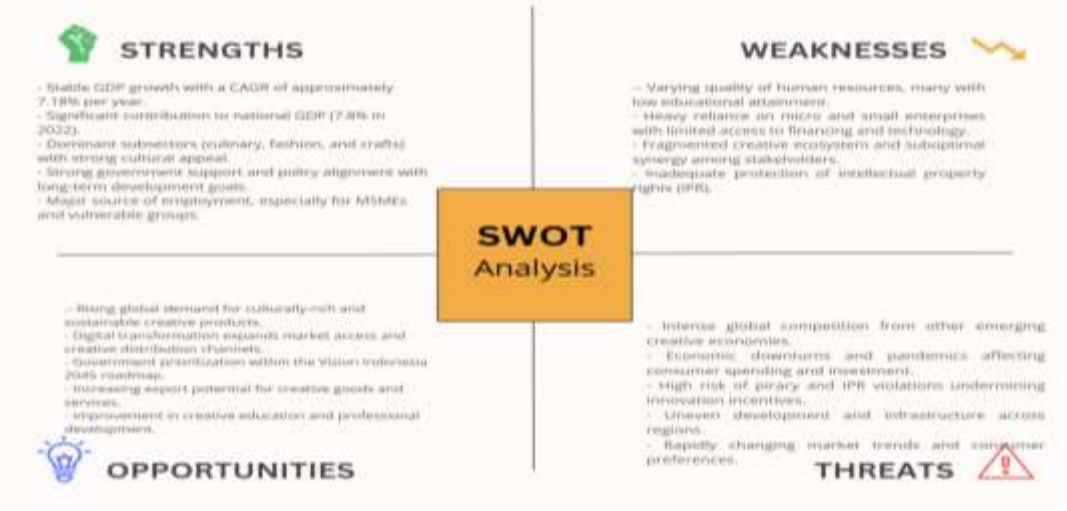


Figure 5. SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) of Indonesia's Creative Economy Sector

driving the growth of Indonesia's creative economy.

However, there are several Weaknesses that need to be addressed, such as the low quality of human resources, MSMEs' dependence on limited access to financing, and suboptimal protection of intellectual property rights. On the other hand, Opportunities including increasing global demand, digital transformation, and the Vision Indonesia 2045 roadmap offer wide-ranging potential for development. Nevertheless, there are persistent Threats, including intense global competition, economic crises, intellectual property infringements, and rapidly shifting market dynamics. Therefore, cross-sector collaboration and adaptive policy frameworks are essential to strengthen the sector sustainably.

Challenges in the Creative Economy: Financing and Infrastructure

Despite the rapid growth of the creative economy sector, one of the main challenges faced is limited access to financing, particularly for MSMEs, which often struggle to secure capital. The lack of equitable digital infrastructure especially outside major cities further widens the regional disparities in terms of creative economy contributions. In addition, many creative economy actors still lack a full understanding of the importance of intellectual property rights protection.

To address these challenges, more proactive policies are needed to provide financing access through banks, microfinance institutions, and grant funds that support the development of the creative economy. Additionally, improving digital infrastructure as well as enhancing digital and managerial literacy for creative entrepreneurs will be crucial in strengthening their competitiveness.

One of the most pressing challenges for creative economy actors is access to financing. According to a survey by Apindo in the Apindo Economic Roadmap 2024–2029, approximately 61.26% of business actors reported difficulties in obtaining loans or credit from financial institutions. This issue poses a serious obstacle, particularly for micro, small, and medium enterprises (MSMEs), which dominate Indonesia's creative economy sector. These financial barriers not only hinder business growth and production capacity but also reduce the ability of entrepreneurs to respond to market trends and product innovation. Limited collateral, weak financial management, and lack of understanding of formal financial systems are key factors that contribute to the difficulty in accessing necessary working capital.

Beyond financing issues, another significant challenge is the limited digital infrastructure, especially in non-urban areas. According to the Indonesia Digital Transformation Report by Lab 45 (2023), although internet users in Indonesia have surpassed 200 million, the equitable distribution of digital access remains a problem. Many creative economy actors in remote regions struggle to access stable and fast internet connections, limiting their ability to market products online and reach global consumers. This digital divide contributes to the growing disparity in contributions between creative entrepreneurs in major cities and those in underdeveloped areas, reinforcing the uneven national growth of the sector. Yet, the digital domain including e-commerce and social media has become the backbone of marketing and distribution for creative products today.

To address these two major challenges, various strategic recommendations have been proposed by both government agencies and the private sector. One key initiative is to provide alternative financing access through programs such as people's business credit (KUR) schemes specifically for the creative economy, innovative grant funds, and the establishment of community-based business incubators. On the infrastructure side, increased investment in digital infrastructure such as expanding 4G networks and developing digital hubs in underdeveloped areas is urgently needed. These measures are essential to ensure that creative economy players across Indonesia can compete fairly and gain maximum benefit from digital transformation. With cross-sector collaboration, Indonesia's creative economy is expected to grow inclusively and sustainably in support of the Indonesia Emas 2045 vision.

Policy Recommendations for Strengthening the Creative Economy Ecosystem

The Indonesian government needs to strengthen the creative economy ecosystem through integrated policies, particularly in financing, skills training, and the protection of intellectual property rights. According to data from the Ministry of Tourism and Creative Economy (Kemenparekraf, 2024), more than 70% of creative economy actors, particularly MSMEs, still face difficulties in accessing financing from formal financial institutions. To address this, programs such as Dana Indonesiana, which allocated IDR 500 billion in 2022 to support art and cultural practitioners, should be expanded and optimized (Ministry of Finance, 2022). Additionally, Apresiasi Kreasi Indonesia (AKI), which in 2023 reached 34 provinces and involved more than 6,000 creative actors (Kemenparekraf, 2023), needs to be strengthened to ensure a more even impact across regions.

On the other hand, adequate regulations regarding copyrights, intellectual property rights, and digitalization must be developed to support inclusive and sustainable growth of the creative economy sector. According to the World Intellectual Property Organization (WIPO), many creative the urgent need for legal education and improved IP literacy among creative industry practitioners (WIPO, 2019).

Furthermore, according to the e-Conomy SEA report (Google et al., 2022), Indonesia's digital economy is projected to reach USD 130 billion by 2025, largely driven by creative digital sectors such as apps, design, and multimedia content. The report states, "Indonesia's digital economy is expected to grow to US$130 billion by 2025, growing at a compound annual growth rate of approximately 19%" (Google et al., 2022).

Strengthening integrated cross-sectoral policies is also essential for ensuring the sustainable growth of the creative economy sector. Data from Statistics Indonesia (BPS) shows that the creative economy sector contributed IDR 1,280 trillion or 7.8% to Indonesia's GDP in 2022 and absorbed more than 23 million workers, equivalent to 17.73% of the total national labor force (BPS, 2023). According to BPS, "the number of workers in the creative economy sector reached 23.2 million in 2022, marking a significant increase from previous years" (BPS, 2023, p. 17). With equitable access to training, financing, and legal protection, the potential of Indonesia's creative economy can be fully maximized as a key driver of national economic development, including in underdeveloped and non-metropolitan areas.

Comparison with Previous Studies

The findings of this study are broadly consistent with previous research emphasizing the strategic role of the creative economy in driving economic growth and employment. Studies by UNCTAD (2022) and Throsby (2010) similarly highlight that creative industries generate high value-added output through innovation, cultural capital, and intellectual property. The strong contribution of culinary, fashion, and craft subsectors observed in this study aligns with findings by Kemenparekraf (2023), which identified these subsectors as the backbone of Indonesia's creative economy.

However, this study extends previous research by providing a more detailed analysis of employment structure, growth trends, and structural constraints such as financing and digital infrastructure. Unlike global studies that often focus on advanced economies, this research underscores the unique challenges faced by developing countries, particularly in ensuring equitable access to resources and digital connectivity. These differences highlight the importance of context-specific policy design in strengthening creative economy ecosystems.

Limitations and Cautions

Several limitations should be acknowledged in interpreting the findings of this study. First, the reliance on secondary data limits the ability to capture firm-level dynamics and micro-level behavioral factors among creative economy actors. Second, variations in data definitions and reporting periods across institutions may affect comparability. Third, while the analysis provides national-level insights, regional disparities within Indonesia's creative economy require further localized investigation. These limitations suggest that the findings should be interpreted with caution, particularly when formulating region-specific policy interventions.

Recommendations for Future Research

Future research should incorporate primary data collection through surveys or interviews with creative industry players in developing countries do not register their works due to limited legal literacy and high administrative costs (WIPO, 2019). In Indonesia, only about 12% of creative economy actors have registered their works or products under the intellectual property protection system, highlighting economy actors to capture micro-level perspectives on innovation, financing, and digital adoption. Longitudinal studies would be valuable in assessing the long-term impact of policy interventions and digital transformation on sectoral performance. Additionally, comparative studies across regions or countries could provide deeper insights into best practices for developing inclusive and resilient creative economy ecosystems.

Conclusion

This study demonstrates that Indonesia's creative economy has evolved into a strategic and resilient pillar of national economic development, contributing significantly to gross domestic product, employment creation, and cultural sustainability. The analytical results show that the sector's GDP value increased from IDR 525 trillion in 2010 to IDR 1,389 trillion in 2024, producing a Compound Annual Growth Rate (CAGR) of approximately 7.18%. This growth trajectory indicates structural expansion rather than temporary fluctuation and suggests that, under a moderate growth scenario, the creative economy could strengthen its role as a core contributor to Indonesia's development agenda toward the Vision of Golden Indonesia 2045. Rather than representing a fixed proportion, the sector's contribution to national GDP is better interpreted within a range of approximately 6–8%, depending on price base and macroeconomic conditions.

The findings further confirm the sector's substantial role in job creation, with more than 23 million workers employed and nearly one in five members of the labor force engaged in creative activities. Employment analysis reveals that the dominance of micro, small, and medium enterprises supports inclusive participation among women, youth, and vulnerable groups, yet also exposes structural constraints related to productivity and skills. The relatively low educational attainment of a large share of workers highlights a critical policy trade-off: rapid employment absorption may occur alongside uneven improvements in innovation capacity and global competitiveness if human capital development does not keep pace with sectoral expansion.

From a structural perspective, the SWOT analysis—derived from systematic document coding of national statistics and policy frameworks indicates that Indonesia's creative economy benefits from strong cultural capital, expanding digital markets, and sustained government commitment. However, the analysis also identifies persistent constraints, including limited access to financing, unequal digital infrastructure, and low levels of intellectual property registration. These weaknesses illustrate another policy trade-off between accelerating market growth and ensuring institutional readiness, particularly for creative actors operating outside metropolitan regions.

The study therefore underscores that the long-term trajectory implied by the 7.18% CAGR is contingent on the effectiveness of ecosystem policies. Sustained growth toward 2045 requires integrated interventions that simultaneously expand financing access, strengthen digital infrastructure, enhance skills development, and improve intellectual property protection. Existing initiatives such as national creative funding schemes, capacity-building programs, and the long-term creative economy roadmap provide an important foundation, but their impact depends on coordination, scalability, and regional inclusiveness.

In conclusion, Indonesia's creative economy holds

substantial promise as a driver of structural transformation in the lead-up to 2045. The empirical findings suggest that maintaining current growth rates could significantly increase the sector's contribution to economic diversification, employment, and cultural diplomacy, yet this outcome is not automatic. Strategic alignment between policy design, technological adoption, and human capital investment is required to balance growth speed with sustainability. By addressing these trade-offs and strengthening the supporting ecosystem, Indonesia can position its creative economy as a globally competitive, inclusive, and culturally grounded engine of long-term national prosperity.

Author contributions

1. Ratna Rosita Pangestika: Research conceptualization, overall supervision, development of the analytical framework, and critical revision of the manuscript to ensure academic rigor and policy relevance.
2. Nurul Hidayah: Methodological design, secondary data analysis, SWOT analysis, interpretation of empirical findings, and contribution to the discussion and policy implications.
3. Niken Purnamasari: Literature review, data compilation and organization, drafting of the manuscript, writing review and editing, project administration, and preparation of the final manuscript for submission.

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Conflict of interest

The authors declare that there are no conflicts of interest financial, personal, or institutional that could influence the objectivity of this research. All stages of the study were conducted independently and without any external influence.

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