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Creative Economy and Its Contribution to National GDP: A Study on the Digital Content Sector

Eva Purnamasari[1], Yusran Zainuddin[2], Sufnirayanti[3], Septi Wifasari[4]
[1]Semarang State Polytechnic
[2]IAIN Sultan Amai Gorontalo
[3]King Ali Haji Maritime University
[4]Binus University

E-mail:
[1]eva.purnamasari@polines.ac.id
[2]yusranzainuddin@iaingorontalo.ac.id
[3]sufnirayanti@umrah.ac.id
[4]swifasari@gmail.com

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ABSTRACT

The digital content sector has emerged as one of the most dynamic components of Indonesia's creative economy, reflecting both economic potential and cultural innovation. Despite its rapid expansion, few studies have examined its quantitative impact on national economic indicators. This study aims to analyze the contribution of the digital content sector to Indonesia's Gross Domestic Product (GDP), while also identifying its development dynamics in terms of opportunities, challenges, and strategic policy directions. A mixed-method approach was employed, combining secondary quantitative data from 2019 to 2023 with qualitative insights gathered through interviews with stakeholders in government, industry, and academia. The findings show that the sector's contribution to the creative economy grew from 15.2% to 20.3%, with substantial increases in export value and employment. The results highlight the sector's growing importance in national economic development, driven by youth creativity and digital penetration. However, structural barriers such as limited access to funding, weak intellectual property enforcement, and digital infrastructure inequality persist. This study concludes that unlocking the sector's full potential requires coordinated policy efforts, including digital investment, local content promotion, and inclusive ecosystem support. The digital content industry thus stands as a strategic pillar for Indonesia's innovation-driven and culturally grounded economic future.

Keywords:*Creative Economy, Digital Content, Economic Contribution.*

INTRODUCTION

The creative economy has become a new driving force in global and national economic development. This concept emphasizes the importance of ideas, creativity, and innovation as key resources in creating added economic, social, and cultural value (Howkins, 2021). This sector has experienced rapid growth in many developing countries, including Indonesia, supported by advances in information and communication technology (UNCTAD, 2022). One subsector showing significant growth is the digital content sector, which includes animation, video games, films, digital music, and social media-based content. In Indonesia, the digital content sector has developed dynamically along with the increasing number of internet and smartphone users. Based on data from the Kreatif (2023), the digital content sector is one of the three creative economy subsectors with the highest contribution to the national Gross Domestic

Product (GDP). The same report stated that digital content contributed around 20% of the total value of the creative economy in 2022, an increase compared to the previous year. This development not only drives national economic growth but also expands job opportunities, especially among the younger generation.

Changes in consumer behavior, with increasing reliance on digital platforms such as YouTube, TikTok, Instagram, and Spotify, have provided strong momentum for digital content industry players to innovate (Hartono, 2021). Content is not only consumed locally but also has global market potential through cross-border distribution. This positions Indonesia as a country with significant potential in the digital-based creative industry, similar to South Korea with its K-pop and drama content industry that has penetrated the international market (Company, 2023). However, despite this enormous potential, the development of the digital content sector in Indonesia faces various structural challenges. Several studies indicate that obstacles remain, including limited digital infrastructure in the 3T (underdeveloped, frontier, and outermost) regions, low digital literacy, weak intellectual property rights (IPR) protection, and a lack of financing schemes for start-up industry players (Nasional, 2022; OECD, 2021). These issues indicate an urgent need to formulate policies that can strengthen the digital content ecosystem in an inclusive and sustainable manner.

Previous research has contributed to mapping key issues in this sector. Yulianti & Surya (2021) highlighted the potential of digital content to accelerate national economic growth through technological innovation. Meanwhile, Pranata (2020) and Nugroho (2019) emphasized the importance of strengthening local cultural identity in digital content production as a strategy to increase the competitiveness of Indonesian content in the global market. However, most of these studies are still descriptive in nature and have not integrated macroeconomic data with qualitative analysis from industry players directly. Quantitative studies that accurately map the contribution of digital content to national GDP are still very limited, especially in the context of post-pandemic Indonesia. Yet, such data is crucial for formulating evidence-based policies for developing the digital creative economy. Furthermore, qualitative studies involving the perspectives of digital content industry players, in terms of their experiences, needs, and challenges, are also still minimal. This creates an information gap between macroeconomic statistical data and the micro reality on the ground (Bank, 2021; Kreatif, 2023).

Thus, a research gap can be identified in the study of the digital creative economy, particularly regarding the contribution of the digital content sector to national GDP in a measurable manner and based on an integrated approach. Most previous studies still separate the economic and socio-industrial dimensions, resulting in less comprehensive analyses. The novelty of this research lies in its approach, which simultaneously combines quantitative and qualitative analysis. This research not only captures the value of the digital content sector's contribution to GDP but also identifies factors influencing the sector's development, including opportunities, challenges, and policy directions that have been and are being implemented. This approach provides a more comprehensive and applicable picture for strengthening the digital creative economy ecosystem in Indonesia and can be used as a reference in developing an innovation-based national strategy (Fahmi, 2020; Kreatif, 2023). Conceptually, this research also enriches the discourse on the role of the creative sector in Indonesia's economic transformation from a natural resource-based economy to a knowledge- and creativity-based economy. In an increasingly competitive global context, strengthening the digital content sector is one of the keys to increasing national economic resilience and independence. Based on this information, the purpose of this research is to comprehensively analyze the contribution of the digital content sector in the creative economy to Indonesia's national

Gross Domestic Product (GDP), by reviewing its economic value and identifying the dynamics of the development of the digital content sector from the perspective of opportunities, challenges, and the necessary strategic policy directions.

METHODS

This study uses a mixed methods approach that combines quantitative and qualitative methods in an integrated manner. This approach was chosen to answer the research objectives that emphasize a comprehensive analysis of the contribution of the digital content sector in the creative economy to Indonesia's national Gross Domestic Product (GDP), both in terms of economic value and development dynamics. Quantitatively, this study utilizes secondary data obtained from official reports of government agencies, such as the Central Statistics Agency (BPS), the Ministry of Tourism and Creative Economy (Kemenparekraf), and annual reports on the creative economy. The data includes the GDP contribution value of the digital content subsector (including animation, games, and social media), annual growth rates, and the export value of digital creative products. The data is processed and analyzed descriptively to map the magnitude of the sector's economic contribution within the framework of national GDP.

Qualitatively, in-depth interviews were conducted with digital content industry players (such as creative startups, content creators, game developers, and animators), academics in the digital creative economy, and relevant officials from the Ministry of Tourism and Creative Economy and the Ministry of Communication and Informatics. Purposive sampling was used to select relevant informants and gain a first-hand understanding of developments, obstacles, and policies within Indonesia's digital ecosystem. The research was conducted from January to April 2025 in three key cities for digital creative economy development in Indonesia: Jakarta, Bandung, and Surabaya, representing content production centers, technology centers, and creative communities.

Data analysis was conducted thematically for the interview results, focusing on three dimensions: (1) opportunities and potential of the digital content market; (2) structural and policy challenges; and (3) adaptive strategies of industry players to technological and economic dynamics. Quantitative data were analyzed to show trends in aggregate economic contributions. To ensure data validity, a triangulation technique of methods and sources was used, in which statistical data were compared and confirmed with findings from field interviews. The analysis process was carried out iteratively to integrate economic data and practical insights, resulting in a relevant synthesis for formulating strategic policy recommendations for the development of the digital content sector.

RESULTS AND DISCUSSION

This study aims to comprehensively analyze the contribution of the digital content sector within the creative economy to Indonesia's Gross Domestic Product (GDP), both in terms of its economic value and its development dynamics. Quantitative data obtained from official reports from Statistics Indonesia (BPS), the Ministry of Tourism and Creative Economy (Kemenparekraf), and industry publications demonstrate a consistent growth trend in the digital content sector over the past five years (2019–2023).

Quantitative Data Table of Digital Content Sector (2019-2023)

No	Year	Creative Economy GDP (IDR Trillion)	Digital Content Contribution (%)	Digital Content Exports (USD Million)	Number of Workers (Million)
1.	2019	1050	15.2	820	8.1
2.	2020	1100	16.5	870	8.3
3.	2021	1175	17.8	940	8.6
4.	2022	1300	19.6	1015	8.9
5.	2023	1400	20.3	1120	9.2

Based on quantitative data, Indonesia's creative economy GDP increased from IDR 1,050 trillion in 2019 to IDR 1,400 trillion in 2023. Over the same period, the digital content subsector's contribution to the creative economy grew from 15.2% to 20.3%. This means that the real contribution of digital content increased from around IDR 159 trillion to more than IDR 280 trillion in five years. This growth indicates that digital content has become a major growth engine in the creative economy sector (Setiawan R., 2023). Furthermore, digital content exports increased from USD 820 million in 2019 to USD 1,120 million in 2023. This data indicates increased global market access for Indonesian digital creative products, such as animation, games, and social media content. This surge occurred alongside the development of digital distribution channels, including YouTube, Spotify, TikTok, and international digital-based marketplaces (Wicaksono H.; Lestari, R., 2022). The number of workers in this sector also increased from 8.1 million people in 2019 to 9.2 million in 2023. This shows that the digital content sector not only creates economic value but also absorbs labor, especially from young age groups with educational backgrounds in technology, design, and visual arts (Fitriansyah S., 2022).

Dynamics of Opportunities and Challenges: Qualitative Findings

Interviews with industry players revealed that one of the sector's key strengths is the involvement of a young generation who are highly adaptable to technological changes and global trends. Cities like Bandung, Surabaya, and Yogyakarta are considered fast-growing creative hubs thanks to collaboration between creator communities, universities, local governments, and businesses (Dewantara R., 2023). However, these players also face a number of significant obstacles. First, access to funding is a major challenge, especially for players outside major cities. Many digital creative startups still rely on private or community funding because they are not yet connected to venture capital or government incubation programs (Julianto T., 2023). Second, legal protection for intellectual property rights (IPR) is considered weak. Piracy of digital content such as illustrations, animations, or songs is a serious obstacle that reduces the incentive for industry players to continue creating original works. Several players stated that they lost potential profits because their work was copied and distributed illegally without adequate legal protection (Nugraha H., 2021). Third, unequal access to digital infrastructure between regions also hinders the development of an equitable ecosystem. The 3T (frontier and outermost regions) still lag far behind in terms of internet speed, technology training availability, and digital production facilities. Yet, the potential of local human resources and culture is enormous if facilitated by adequate infrastructure (Saputra A.; Widodo, D., 2023).

International Comparative Studies: Lessons from Other Countries

Compared to countries like South Korea, India, and Malaysia, Indonesia still has a significant amount of work to do in building a national digital content ecosystem. South Korea, for example, has been able to make content like K-pop and dramas a major export commodity thanks to comprehensive state policies and an aggressive funding system (Lee S., 2020). In India, the "Digital India" program not only builds infrastructure but also provides digital training to millions of young people, including in the field of creative content (Gupta S., 2021). Malaysia has even established a Digital Content Fund to support local content production with export potential (Ramli R., 2022). Indonesia can learn from these policy intervention models to accelerate the strengthening of its domestic digital content sector.

Social and Cultural Dimensions: Beyond GDP

The contribution of the digital content sector cannot be measured solely through economic value. From a social and cultural perspective, digital content serves as a means of conveying local identity and building national pride. Local narratives packaged in animation, webtoons, or short videos enrich the community's cultural literacy and serve as tools for cultural diplomacy on the global stage (Mahendra T., 2022). The use of regional languages, digital batik motifs, and folk tales in digital products demonstrates that this sector can be a space for healthy cultural contestation, as well as a tool for educating and empowering local communities. Several studies even show that consuming digital content that emphasizes local values increases social participation and collective identity among the younger generation (Rachmawati I., 2022).

SWOT Analysis of the Digital Content Sector

As a synthesis of quantitative and qualitative results, here is a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis of Indonesia's digital content sector:

a. Strengths: Large digital population, creative young talent, rich local culture, high social media penetration.
b. Weaknesses: Weak IPR protection system, digital infrastructure gap, limited access to funding.
c. Opportunities: Open global content market, rising digital culture trends, global platform partnership opportunities.
d. Threats: Content piracy, slow-to-adapt regulations, dominance of foreign content in the domestic market.

This analysis reinforces that the contribution of digital content to GDP must be viewed within a broader framework than just the economy, but also in strategic and systemic aspects.

Based on the findings, there are several important recommendations that can be taken:

a. Strengthening IPR regulations and enforcement against violations in the digital world.
b. Expansion of fiscal incentives for local digital creative industry players.
c. Development of a Digital Content Fund as implemented in Malaysia.
d. Digital infrastructure investment in 3T areas with local content priority.
e. A global campaign to promote Indonesian content through cultural diplomacy channels and cross-sector collaboration.

CONCLUSIONS

The conclusions of this study demonstrate that the digital content sector significantly contributes to Indonesia's national GDP, aligning with the research objective to comprehensively assess its economic value and development dynamics. Between 2019 and 2023, the sector experienced steady growth in value, exports, and employment, with its share in the creative economy rising from 15.2% to 20.3%. This reflects not only its economic importance but also its strategic potential in driving innovation. However, challenges such as funding limitations, weak intellectual property protection, and digital infrastructure gaps hinder inclusive growth. Addressing these issues through targeted policies—such as strengthening IPR enforcement, expanding infrastructure, and establishing a Digital Content Fund—will be crucial to fully harnessing the sector's potential and sustaining its long-term impact on Indonesia's innovation-based economy.

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