

A PORTRAIT OF THE CREATIVE ECONOMY SUB-SECTOR IN THE GROWTH TRIANGLE AREA



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Article History

Received: 22 August 2022

Revised: 31 October 2022

Accepted: 16 November 2022

Published: 5 December 2022

Keywords

Analytic hierarchy process

Creative economy

Economic subsectors

Growth triangle area

Economic growth

Priority criteria

Indonesia

Jambi.

ABSTRACT

The aim of the current paper is to analyze other potentials of the creative economy sub-sector in the growth triangle area. The growth triangle area is a strategic location located in the growth triangle area of Indonesia, Malaysia and Singapore (IMS-GT) and very close to the Straits of Malacca (80 miles). Its location is in Jambi province. In addition to culinary, crafts and fashion as the leading creative economy sub-sectors in Jambi Province, the Analytic Hierarchy Process is used to determine other potential creative economy sub-sectors that may be able to expand. The result shows that the subsectors with the best criteria are 1) Film 2) Application and Games 3) Music 4) Photography 5) Publishing 6) Performing arts 7) The fine Arts. which developed independently and were not exist in previous research. Theoretical concepts and practical research are connected in this paper. The Jambi province government will find this research helpful in developing best policies to accelerate the development of another potential creative economy sub-sector. The novel studies presented seven sub-sectors of the creative economy that are priorities in Jambi Province with the original priority criteria are as follows 1) Culture 2) Finance 3) Infrastructure, 4) Gross Domestic Product 5) Market Share 6) Share the Workforce.

Contribution/ Originality: Previously, there had been no research examining the potential for a creative economy sub-sector to be developed in Jambi Province. Previous research has only scrutinized ed a part of the creative economy sub-sector. This research uses an *Analytical Hierarchy Process* (AHP) to determine the potential creative economy sub-sector to grow in the future.

1. INTRODUCTION

According to Schumpeter's theory of economic growth which is influenced by entrepreneurs (Sukirno, 2004), entrepreneurs are considered as a group that will continuously renew and innovate in economic activities that will create new investments, including new products, increasing efficiency in producing an item, expanding market

share, developing new sources of raw materials and procuring changes in a business organization with the aim of improving the efficiency of company activities. The creative economy is a concept in the new economic era that intensifies information and creativity by using ideas and knowledge from human resources as the main production factor. The economic structure have changed as a result of the industrial revolution. The agriculture sector and capital goods- based sector have taken over the economy which was initially dominated by human and natural resource-based.

The concept of “creative economy “was first used by [Howkins \(2001\)](#). A Creative economy is “an economic activity in a society that spends the majority of its time developing ideas rather than performing monotonous routine tasks”. Howkins illustrates the relationship between the creative economy and factors including economic conditions, social diversity, adaptability and acceptance of change, as well as the learning capacity of people involved in economic activities. The technological and non-technological fields such as operations, organization, processes, finance, marketing, and economics are all affected by innovations and resulting creative and planned activities. They serve as both the main intangible asset and the main tool for enhancing and shaping competitiveness as well as the fundamental process of organizational renewal ([Bielińska-Dusza & Hamerska, 2021](#)).

According to the data based on Focus Economy , Indonesia’s creative economy has made a considerable contribution to the country’s Gross Domestic Product throughout the Covid-19 Pandemic related economic crisis ([The Ministry of Tourism and Creative Economy, 2020](#)). The Contribution is Rp 1,100 trillion to country’s Gross Domestic Product This is clear evidence that the creative economy is able to survive during COVID -19 pandemic. The digital industry is growing rapidly during COVID-19, especially in digital startup which has developed a variety of innovative goods. The three major contributors to the structure of Gross Domestic Product (GDP) and exports, such as fashion, culinary and handicrafts are among the seventeen subsectors of the creative economy. The first rank is occupied by culinary at 70.26%, the second place is fashion at 17%, and handicrafts at 14.9%. Meanwhile, the top three (3) for tourism products and the creative economy currently are culinary, nature tourism, and active lifestyle.

Jambi Province is in a strategic location which is located in the growth triangle area of Indonesia, Malaysia and Singapore, and very close to the Malacca Strait (80 miles), where the Malacca Strait currently plays an important role in international shipping and trade activities that will always be able to support economic activities or investment in Jambi Province. Jambi is one of the Provinces that has a fairly high average economic growth rate in Sumatera by 6.66% ([Zulgani & Zevaya, 2021](#)). The Muaro Jambi Temple, Kaco Lake, Gunung Tujuh Lake, Geopark and others sites in Jambi province have a great deal in potential as tourist attractions. The Anak Dalam Tribe is one example of educational and cultural tourism available in Jambi Province. The Anak Dalam Tribe is an endogenous community of people who lives in the jungle or people who are one of the minority tribes living on the island of Sumatra, namely Jambi and South Sumatra. In addition to the tourism sector, handicrafts, culinary and fashion also have great potential to be developed especially after the Covid-19 pandemic. This is due to the fact that the three most important creative economy sectors in Jambi Province are handicrafts, culinary, and fashion. are the leading creative economy sectors in Jambi Province. The merger of potential sectors in Jambi Province by promoting tourism, creative economy actors from industry and micro, small and medium enterprises (MSMEs) can create significant economic growth. There have been 84.358 creative economic businesses in Jambi Province. ([Central Bureau of Statistics of Jambi Province, 2021](#)). However, there are still creative economic sub-sectors that have not fully developed or made optimal contribution to the economy. Of the 17 (seventeen) sub-sectors, there are 3 (three) sub-sectors that are leading in the creative economy and contribute the most as compared to other sectors, namely i) culinary which contributes 70.26% ii) fashion by 17.22%.and (iii) handicrafts which contributes 14.9% In the meantime, the other 14 (fourteen) creative economy sub-sectors are still in progress, such as iv) application and game development contributing 0.06% v) architecture contributing 0.22% vi) product design by 0.02% vii) visual communication design 0.00% viii) performing arts 0.11% ix) animation film and video

contributing 0.02% x) photography contributing 1.27% xi) music 0.54% xii) publishing and advertising by 0.07% xiii) art by 0.20% and xiv) television and radio contributing 0.06%.

There has been no previous research that has analyzed other creative economy sub-sectors that have the potential to grow in the future. The previous research has only focused at how the creative economy was developing in certain sub-sectors, such as culinary and handicrafts. For instance, the Anak Dalam Tribe produced the ancient skill of rengke in the Indonesian province of Jambi. (Sari, 2018). In the meanwhile, Sari (2018) identifies the challenges and suggests solutions to avoid the extinction of this Jambi culinary specialty. Moreover, Karmela (2015), the handicraft sector has positive economic implications for craftsmen, laborers and entrepreneurs as well as for the improvement of other sectors such as the tourism industry in Jambi City. This research only focuses at product innovation in handicrafts and analyses factors that influence the culinary sub-sector without analyzing other sub-sectors that might be able to grow.

This research will examine other creative economy sub-sectors from the existing 14 sub-sector categories, apart from culinary, handicrafts and fashion. There has been no previous research that analyzed other creative economy sub-sector that might be able to grow as previously mentioned. This research will produce a new scientific paper related to other creative economy sub-sectors that will grow in Jambi Province.

2. LITERATURE REVIEW

The Creative Economy is a notion that emerges from the ability of "creative assets" to promote socioeconomic growth and development in a worldwide society increasingly dominated by pictures, sounds, words, and symbols. The creative economy depends on the creative industry. Intellectual capital is the key component of creative industries that include the intersection of art, culture, business and technology. The modern creative industries include folk art, festivals, music, books, newspapers, painting, sculpture and performing arts as are more technologically intensive sub-sectors such as film, television (TV) and radio broadcasting, digital animation, video games and other services as well as more oriented fields such as architecture and advertising services (United Nations Conference on Trade and Development, 2008).

The emergence of the creative economy is due to the exchange of information as a result of socio-economic connectivity originating from various parts of the world. The uninterrupted exchange of information is driven by technological developments and globalization so that the world becomes a competitive space for all countries to improve their economic quality in order to compete for domestic and foreign markets (Sururi, 2018). Thus, a country or region has an obligation to improve the quality of its economy through the development of creativity as its main driver.

According to John Hawkins in "Creative Economy, how people make money from ideas", is an economic activity whose input and product are ideas, which is essential in the creative economy. Creative people can earn money by generating great ideas and these ideas are protected under Intellectual Property Rights (IPR) (Suci, 2008).

There are 17 sub-sectors of creative economy in Indonesia, 1) Animation, computer-based animation related creative activities with production techniques that can be used broadcast on all types of media, namely: widescreen animation, animated television series, animated commercials, web animation and game animations, as long as they are created with a computer or a combination of computers and manuals 2) Architecture, creative activity related to interior design, landscape architecture, civil engineering and engineering building services 3) Design, this creative activity is related to the design of visual communication, product design and interior design 4) Photography, this creative activity focuses on professional photography which include journalistic photography, commercial, and artistic photography 5) Music, this creative activity emphasizes more on the development of the music industry which is expected to provide economic added value for the actors involved in it and a quality of life for the audience. This activity is targeted at artists, songwriters, lyricists, music arrangers, composers, producers, sound engineers,

music directors and session players 6) Crafts, these are creative activities related to arts and design crafts. Art crafts include limited edition crafts and individual crafts are in 2-dimensional form (carving, relief, painting carving), while craft design includes mass produced crafts, limited edition crafts and individual crafts in 3-dimensional form (furniture, jewelry, toys, traditional clothing, kitchenware, and others) 7) Culinary, this creative activity has divided into 2 categories namely culinary services and goods. Service culinary goods include restaurants and catering services while culinary goods include specialty foods 8) Fashion, 9) Research and development, the emphasis of this creative activity is on applied research and development. The application of science can be targeted at the social, humanities, science, and technology and engineering fields, 10) Publishing, this creative activity is not only focused on book publishing but also media publishing such as periodicals, software, interactive games or other publications such as music, videos or films and animation 11) Film and Video 12) Advertising, this creative activity is not only limited to product/service marketing but is also developing into social marketing, 13) Interactive games, this creative activity is included in the category of interactive games with platforms: arcade, client-based PC and social media as well as mobile, for all genres with the aim of emphasizing educational, advertising, serious and casual categories 14) The Performing Arts, 15) Fine Arts, a creative activity related to modern and contemporary art based on pure artistic values, covers: the entire academic scope, namely the applied arts and fine arts; and product scope, be it as works of art as well as knowledge products 16) Information Technology 17) Television and radio, this creative activity focuses on content development not on activities broadcast. Television content covers four broad categories, namely soft news, programming, entertainment, games and music and performances while radio content includes: news, freelance broadcasts, broadcast with script and music (Suparmin, Priyanto & Setiadi, 2017).

Some of previous research above, they only examine product innovation from the handicrafts and factors in influencing culinary sub-sector without analyzing other sub-sectors that might be able to grow.

3. METHODOLOGY

Both primary and secondary data are used in this research. Primary data is collected by focus group discussion while secondary data is collected from related institutions. Descriptive statistics is a special method which is basically used to calculate, describe and summarize the research data collected in a logical, meaningful and efficient manner (Vetter, 2017). Descriptive qualitative research aims to describe, analyze and explain in more detail the problems studied by extracting information optimally. In addition, this research is analytically descriptive because it examines how innovations in creative economic policy models are generated in addition to simply describing the object of study.

The technique used by the researcher is a survey of academic literature in the field of public policy science in order to obtain concepts relevant to the study of the creative economy. Meanwhile, data collection was carried out through focus group discussions (FGD), interviews and by processing data obtained from the website of the relevant regional apparatus organizations and tracing various sources of print and electronic mass media reporting which were then described in the form of narratives according to data needs. On the basis of theory and concept of public policy, data analysis was then conducted followed by interpretation process while using the Analytical Hierarchy Process (AHP).

AHP is a decision-making approach model designed to help determine priorities and solutions in solving complex multi-criteria problems and perform comparative analysis of each criterion with the basis of arrangement based on hierarchical elements. A hierarchy is a description of a complex problem where the first level is the goal, followed by the level of criteria factors, sub -criteria and so on to the last level, namely the alternative. By using a hierarchical description, problems can be grouped in a more structured and systematic way. AHP is not only used to determine the priorities of various criteria but its application is also widely used as an alternative or solution to solve various problems. Basically, the steps in the AHP method are as follows: 1) Determining the problem and the desired solution 2) Creating a hierarchical structure that is faced according to the criteria and alternative choices.

3) Establishing priorities through pairwise comparisons that contribute relatively according to the criteria at the preceding level. 4) Normalizing the data by dividing each element of the pairwise matrix by the total value of each column. 5) Calculating the eigenvector value and testing its consistency, if it is not consistent then data collection needs to be repeated. 6) Repeating steps 3, 4, 5 for all the hierarchical levels. 7) Calculating the eigenvectors of each paired matrix. Eigen vector is the weight of each element and 8) Testing the consistency of the hierarchy (Consistency Index/CI). If it does not meet $CI < 0, 100$ then the assessment must be repeated.

The hierarchy used in this study is as followed.

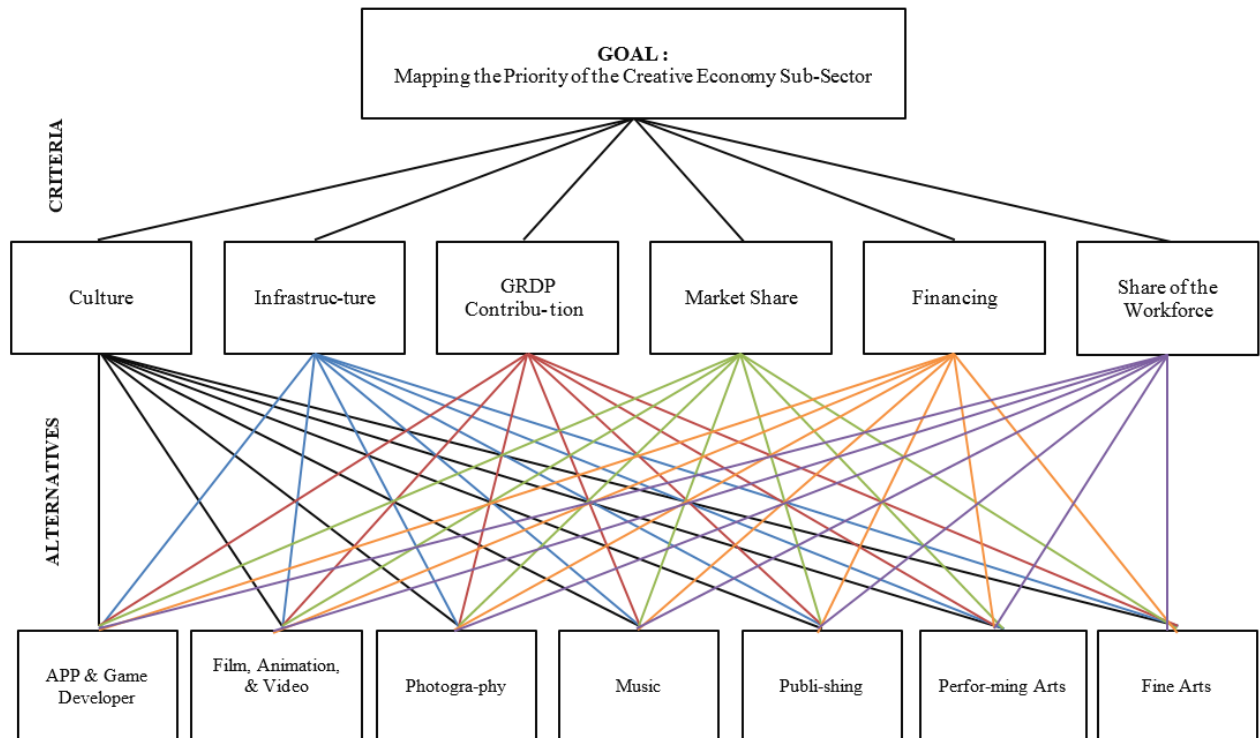


Figure 1. Hierarchy of mapping the priority of the creative economy sub-sector in Jambi province.

Figure 1 presents the hierarchy of mapping the priority of the creative economy sub-sector in Jambi Province. The criteria consist of Culture, Infrastructure, Gross Domestic Regional Product (GDRP) contribution, market share, financing, and share of the workforce. Then, the alternatives consist of application (APP) and game developer, film, animation and video, photography, music, publishing, performing arts, Fine arts. Each criteria has an effect on the alternative section. For instance: culture has an influence on Application (APP) and Game Developer, film, animation and video, photography music; publishing performing arts, fine arts so on and so forth with others criteria.

4. RESULTS AND DISCUSSION

4.1. Determination of Criteria and Priority Criteria

The limitations and key components of the creative economy are determined by the stakeholders e in the creative economy obtained through FGDs.

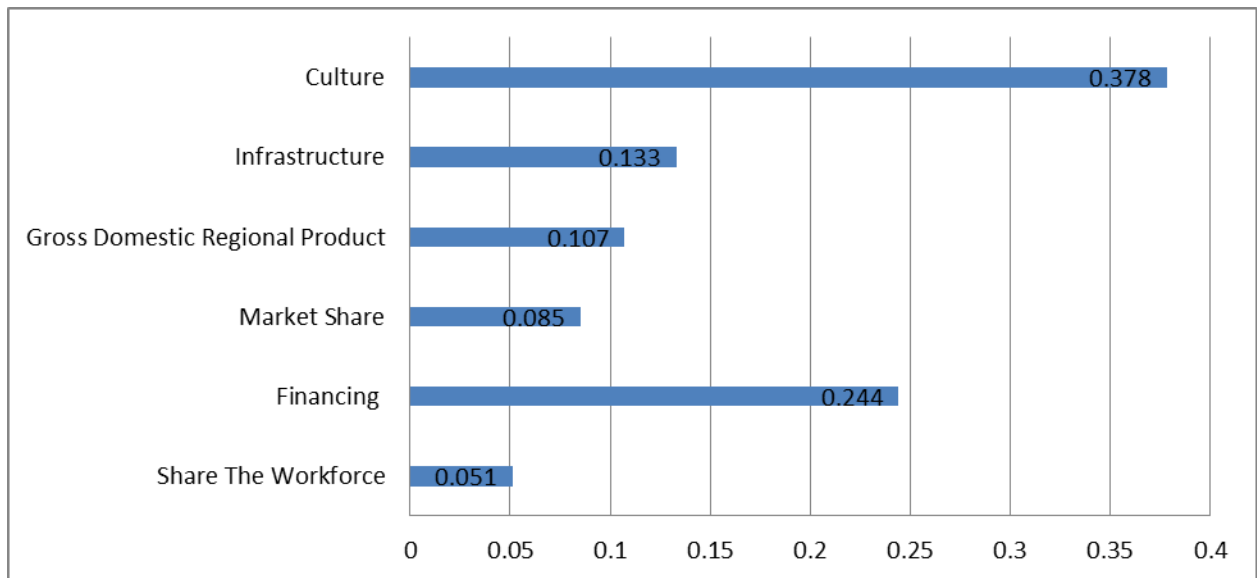


Figure 2. Priority criteria for creative economy development in Jambi Province.

Figure 2 explains the priority results and show the ranking of criteria from the most important are 1) Culture 2) Financing 3) Infrastructure 4) Gross Domestic Regional Product 5) Market Share 6) Share of the workforce. Culture is the main criteria for the creative economy in line with the Creative Economy Issue in the Association of Southeast Asian Nations (ASEAN) which consists of culture, identity and business of creativity (ASEAN, 2021). Aside from culture, a study was conducted to identify some characteristics of a creative economy business profile, such as 1) Gender of employer 2) Start-up businesses 3) Entity (legal) status 4) Preparation of financial reports 5) Business network 6) Employment 7) Internet presence 8) Engagement in e-commerce 9) Franchise status 10) Gross revenue. Based on Indonesian experience, productive employment and resilient infrastructure are the purposes of a creative economy in Indonesia (Lestariningsih, Maharani & Lestari, 2019). These concepts are related to the priority criterion result. According to Haryadi, Umiyati and Dhora (2021) market share is the criteria for developing the competitiveness of Indonesian exports in ASEAN. The result of that study concluded that in gaining market share in ASEAN, it is necessary to create quality products and improve the competitiveness of existing natural resources.

4.2. Determination of Alternatives and Priorities for Creative Economy Sub-Sectors

Three sub-sectors of the creative economy namely culinary, handicrafts and fashion, are the most important in Jambi province and across the country as it is explained in the introductory chapter. Meanwhile, there are fourteen other sub-sectors that can be chosen as the focus of creative economic development. The role of these sub-sectors was chosen from the one with the highest contribution to the Gross Domestic Regional Product (GDRP) sector as the focus of the development of the creative economy sub-sector in Jambi Province. The following is a classification of the contribution of the Creative Economy Sub-sector to the GDRP of Jambi Province (Central Bureau of Statistics of Jambi Province, 2021):

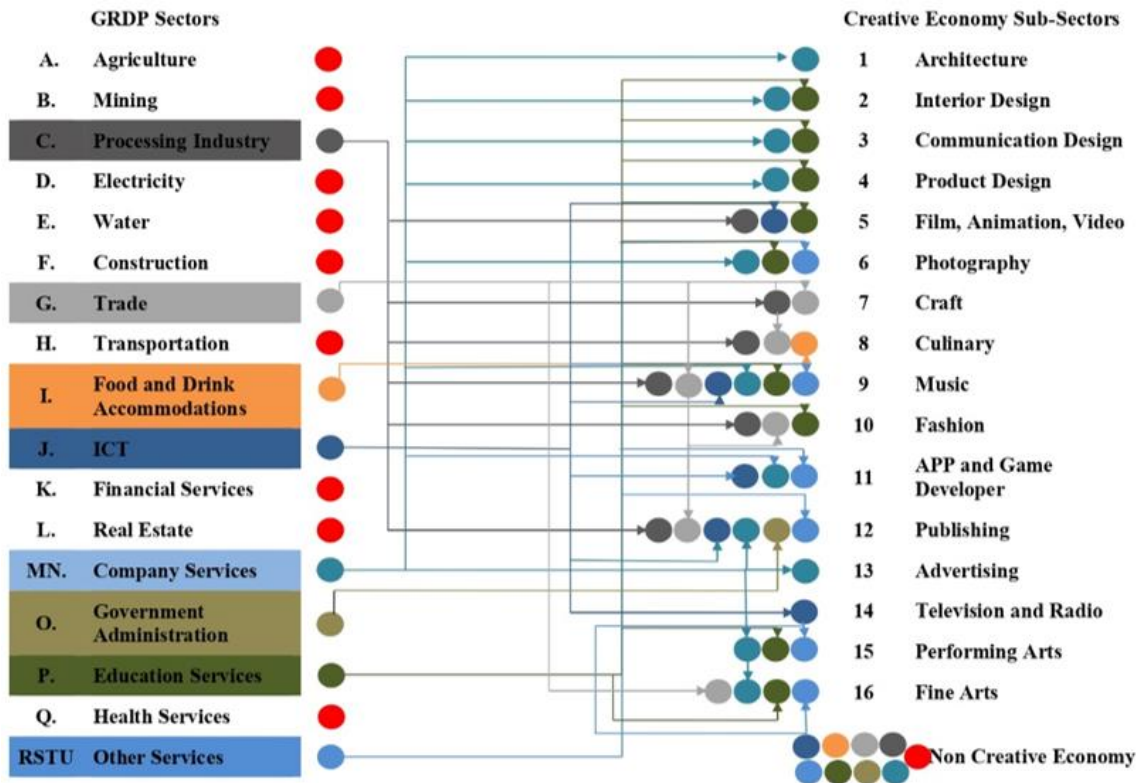


Figure 3. Classification of contribution of creative economy sub-sectors to GDRP.

Source: Central Bureau of Statistics of Jambi Province (2021).

Based on Figure 3, there are 17 (seventeen) creative economy sub-sectors that have a contribution to Gross Domestic Regional Product (GDRP) sectors. They are: 1) Architecture 2) Interior Design 3) Communication Design 4) Product Design, 5) Film, animation, video, 6) Photography 7) Craft 8) Culinary 9) Music 10) Fashion 11) Application (APP) and game developer 12) Publishing 13) Advertising 14) Television and radio 15) Performing Arts, 16) Fine Arts. Meanwhile, The GDRP sectors are: 1) Agriculture 2) Mining 3) Processing Industry 4) Electricity 5) Water 6) Construction 7) Trade 8) Transportation 9) Food and drink accommodations 10) Information, Communication, Technology (ICT) 11) Financial services 12) Real estate 13) Company services 14) Government administration 15) Education services 16) Health services 17) Other services. According to this classification, it can be concluded that the alternative creative economy sub-sector has the biggest role in the economy which can be concluded in the following Table 1:

Table 1. Alternative sub sectors.

No.	Sub-sector	Linkages to GDRP Sector
1	Publishing and Advertising	6 sectors: industry trade, information and communication, enterprise services, government administration, other services
2	Music	6 sectors: trade, information and communications industry, enterprise services, educational services, other services
3	Fine Arts	4 sectors: industry trade, educational services, other services
4	Film, Animation, and Video	3 sectors: industry, information and communication, educational services
5	Photography	3 sectors: enterprise services, educational services, other services
6	Application and Game Developer	3 sectors: information and communication, enterprise services, other services
7	Performing Arts	3 sectors: enterprise services, educational services, other services

Source: Data processed (2021)

The sub-sectors are used as the basis for alternative preparation in the AHP questionnaire which will determine the potential strategy of the creative economy sub-sector. Based on these alternatives, the results of the priority or alternative rankings of the creative economy sub-sector are as follows.

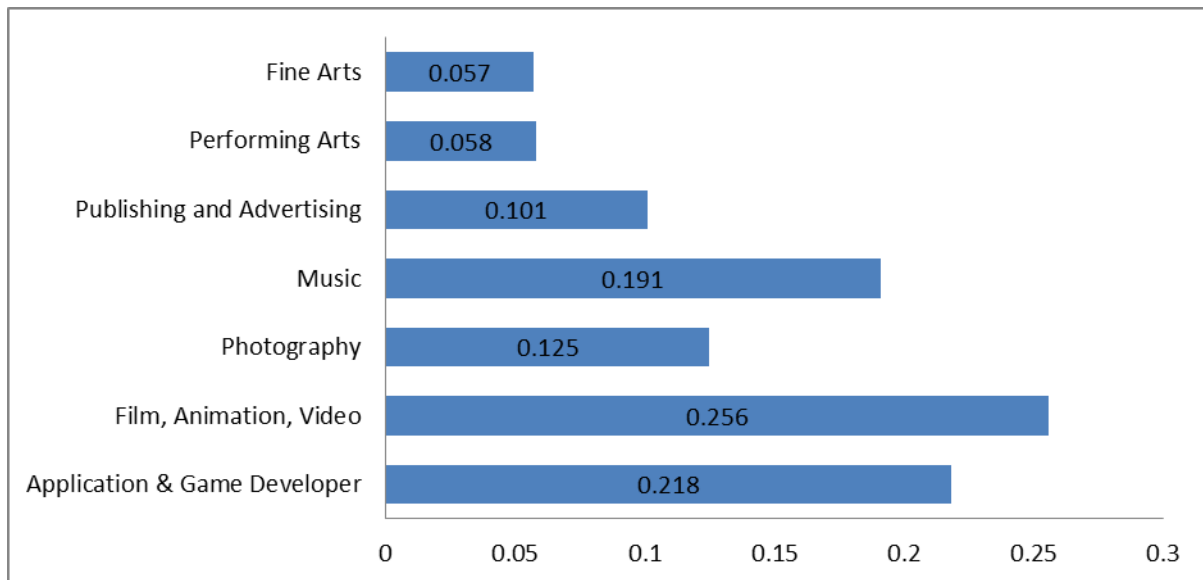


Figure 4. Priority alternative for creative economy development in Jambi province.

Figure 4 shows the development ranking of the priority sub-sectors in Jambi Province in addition to the culinary, craft and fashion sub-sectors. Sequentially, based on the most important ranking, the priorities for the creative economy sub-sectors are (1) The film, animation, and video sub-sectors, (2) Application and game developer sub-sector (3) Music sub-sector (4) Photography sub-sector (5) Publishing and advertising sub-sector (6) Performing arts sub-sector and (7) Fine arts sub-sector. Based on the results of the AHP alternative priorities, the three sub-sectors with the highest priority level are the film, animation and video sub-sector, followed by the application and game developer sub-sector and the music sub-sector.

4.3. Policy Direction and Strategy for Jambi Province's Creative Economy Development

As a guide in determining the direction of policies and strategies for developing creative economy in the regions, the Ministry of Tourism and Creative Economy outlines the principles of the national creative economy as contained in the Master Plan for Creative Economy Development.

The Presidential Decree No. 142 of 2018 concerning the Master Plan for the Development of the National Creative Economy 2018 – 2025 and Law Number 24 of 2019 concerning the Development of the Creative Economy Ecosystem and the Structure of the Ministry of Tourism and Creative Economy. the second period (2020 – 2025) (Creative Economy Agency, 2018). Based on the master plan principles, the policy directions, targets and strategies for developing the national creative economy are related to the empowerment of creative economy actors, the development of creative city networks, increasing awareness of intellectual property rights ownership providing adequate infrastructure, strengthening creative economy ecosystem institutions, increasing financing for creative economy businesses, as well as product development and creative economy markets.

The formulation of the policy direction and strategy for developing the creative economy of Jambi Province is linked to the Jambi Province's 2021-2026 vision which states "The realization of a more advanced, safe, comfortable, orderly, trustworthy and professional Jambi province under the blessing of Allah. The following are the priorities for the Jambi Province creative economy development policy:

Table 2. Policy directions and targets for JAMBI province creative economy development.

No.	Policy Priorities	Targets
1.	Cultural Development and Improvement of Human Resources for Creative Economy Actors	a. Increased protection, development and utilization of natural resources and cultural heritage b. Increased public awareness of creativity and intellectual property rights c. Increasing the number and quality of quality creative economic actors
2.	Ease of Financing and Investment	a. Develop a specific financing scheme for creative economy actors b. Increasing the reach of information for creative economy actors related to financing schemes for creative economy businesses c. Creating a healthy investment environment, especially for the creative industry
3.	Institutional strengthening that supports the creative economy ecosystem	a. Increase the institutional capacity for the development of the creative economy ecosystem
4.	Provision of adequate infrastructure and information and communication technology	a. Availability of adequate and competitive technology infrastructure to support creativity empowerment b. Optimizing the use of ICT (Information, Communication, Technology) to increase the quantity and quality of creative economy work
5.	Strengthening value added and the contribution of the creative economy sub-sector	a. Increase the added value of creative economy works b. Increase the contribution of the priority sub-sector of the creative economy c. Increase exports of creative works
6.	Expansion of the market share of creative economy products	a. Increase the competitiveness of creative economy works b. Increase marketing and promotion of creative economy works at home and abroad
7.	Absorption of labor in creative economy businesses	a. Increase job opportunities in the creative industry b. Increase employment in creative industries

Source: Data processed (2021).

Table 2 presents the policy priorities and targets that are formulated using the results of the AHP Analytical Hierarchy Process (AHP) priority criteria and priority alternative. AHP results show the suitability of the needs of creative economy stakeholders with local government expectations. Therefore, the policy direction can be used as a tool to develop sub-sectors priorities as leading sub-sectors for the development of the creative economy in Jambi Province. The policy priorities are: 1) Cultural Development and Improvement of Human Resources for Creative Economy Actors 2) Ease of financing and investment 3) Institutional strengthening that supports the creative economy ecosystem 4) Provision of adequate infrastructure, information and communication technology 5) Strengthening value added and the contribution of the creative economy sub-sector 6) Expansion of the market share of creative economy products 7) Absorption of labor in creative economy businesses.

5. CONCLUSION

Three sub-sectors namely culinary, craft and fashion out of 17 recognized creative economy sub-sectors have developed and predominated the creative economy in Jambi province. Therefore, the potential for other sub-sectors for the Jambi province creative economy of Jambi Province is analyzed in addition to the three sub-sectors that currently dominate it. Alternative sub-sectors that can be identified are the publishing and advertising sub-sector, film, animation and video sub-sector, photography sub-sector, music sub-sector, application and game developer sub-sector, fine arts sub-sector and performing arts. From the alternative sub-sectors, based on the results of the AHP sequentially, the most important alternative sub-sectors are (1) film, animation, and video sub-sectors, (2) Application and game developer sub-sector, (3) Music sub-sector, (4) Photography sub-sector, (5) publishing and advertising sub-sector, (6) Performing arts sub-sector and (7) Fine arts sub-sector. Meanwhile, as a reference for formulating policy directions, based on the results of the AHP analysis, the most important criteria are (1) Culture and Human Resource Development, (2) Financing and ease of investment, (3) Availability of Infrastructure, Information, Communication, Technology, (4) Contribution to Gross Domestic Regional Product (GDRP) and value added, (5) Market Share (Domestic and Overseas) and (6) Manpower Absorption.

Funding: This study received no specific financial support.

Competing Interests: The authors declare that they have no competing interests.

Authors' Contributions: All authors contributed equally to the conception and design of the study.

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