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A PLATFORM FOR INDIAN OPPORTUNITY

ASSESSING THE ECONOMIC, SOCIETAL, AND
CULTURAL IMPACT OF YOUTUBE IN INDIA



EXECUTIVE SUMMARY

YOUTUBE'S IMPACT IN INDIA

Every day, YouTube helps people in India learn new skills, share their passions, enrich their lives, and grow their businesses. It helps provide a stepping stone to achieving better productivity, employability, and higher incomes; thus making a meaningful impact in the lives of millions of Indians. Analysis by Oxford Economics shows the **YouTube creative ecosystem contributed INR 6,800 Cr to the Indian economy in 2020 and supported 6,83,900 jobs.** YouTube's impact goes much further, bringing a rich array of economic, societal, and cultural benefits to the Indian population.

TOTAL ECONOMIC IMPACT



₹6,800 cr

contribution to Indian GDP in 2020



6,83,900

full-time equivalent jobs



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- YouTube generates **substantial revenue** for creators, artists, and media companies, who in turn support a broad ecosystem of employees and businesses in India.
- Creative entrepreneurs use the platform to **pursue their professional goals**, enabling them to share their passions and ideas with a wide audience, and make an income whilst doing so. In India, over 40,000 channels have over 1 lakh subscribers, an increase of over 45%, year over year.*
- YouTube helps businesses **grow their customer base**, and make their employees more productive with easy access to information and training materials.



SOCIETAL

- Creators deliver a **wealth of educational tools and materials**, which are valued by students, parents, and teachers alike.
- Indian users look to YouTube as a **vehicle for self-improvement**, and a means to find rewarding work and progress their careers.
- When India was affected by COVID-19, YouTube worked closely with authoritative organisations and creators across the country to **provide fact-based, trustworthy information** in multiple regional languages, in addition to English and Hindi.



CULTURAL

- YouTube helps **preserve and celebrate India's rich cultural heritage**, serving as a freely accessible repository of the diverse customs and traditions across the country.
- Indian users go to YouTube to **learn about their cultural heritage and traditions**, and can do so in their native language.
- YouTube enables Indian creators to share their content with **audiences all around the world**.

OUR TERMINOLOGY

Creative entrepreneurs are creators that meet at least one of the following criteria, i) Earn income directly from YouTube and/or wider income helped by their YouTube presence, ii) Permanently hire paid employees to work on their channel, iii) Have more than 10,000 subscribers to their largest channel.

OUR METHODOLOGY

Oxford Economics used survey data and official statistics to model the economic impact of the YouTube creative ecosystem, in terms of its contribution to employment and GDP. We undertook three anonymised surveys comprising 4,032 India-based users, 1,203 creators, and 1,020 businesses. Our user survey was fielded in seven languages (Hindi, English, Bengali, Marathi, Telugu, Tamil, and Malayalam), and captured responses from socio-economic categories A to E in the New Consumer Classification System (NCCS). Over the following pages, we present the results of our economic modelling and research, accompanied by a series of case studies.

YOUTUBE CONTRIBUTED ₹ 6,800 CR TO THE INDIAN ECONOMY IN 2020

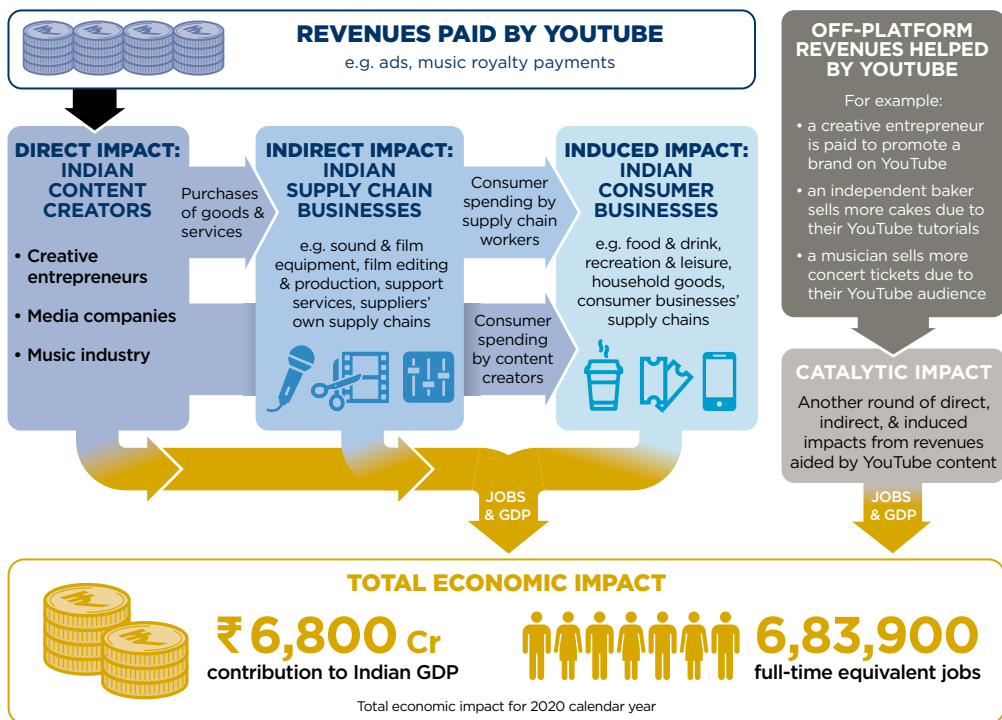
The growing YouTube community generates a huge amount of economic value in India—not just for creators but also for businesses, employees, and consumers across the country.

A principal source of YouTube's economic impact is the revenue the platform redistributes to its creators, which can include ad sales, payouts from eight alternative monetisation features such as channel memberships and Super Chat, and royalty payments paid to music and media companies. We refer to the profits and earnings of those creators as the YouTube ecosystem's **direct economic impact** in India.

In producing content for YouTube, creators spend money on goods and services in their supply chains, which also stimulates an **indirect economic impact**. In turn, creators and other employees of YouTube's creative ecosystem, or its supply chain (including video editors, graphic designers, producers etc.), go on to spend their earnings. This activity creates a further **induced economic impact** in the economy.

In addition, we have estimated the revenues that YouTube creators earn from other sources that are stimulated by their YouTube presence. This includes increased product sales, brand partnerships, or live performance engagements. These "off-platform" revenues create a **catalytic impact** on the economy, stimulating additional indirect and induced impacts through supply chain activity and wage expenditure.

The YouTube creative ecosystem's total economic impact refers to the sum of its direct, indirect, induced, and catalytic impacts.





PROVIDING ECONOMIC OPPORTUNITIES TO INDIAN CREATORS

YouTube provides Indian creators with a platform to share their passions and ideas, and to exhibit their expertise and skills. This presents creative individuals from all walks of life with a unique employment opportunity and a vehicle to build a career, which contributes to the local Indian economy.

72% of creative entrepreneurs agree that the revenue they receive from ads placed on their YouTube content is an **important source of income** for them.

80% of creative entrepreneurs believe that YouTube has had a **positive impact on their professional goals**.

63% of creative entrepreneurs agreed that being on YouTube has brought them **opportunities away from the platform**.

Over 4,000 channels have **over 1 million subscribers**, an increase of over 50%, year over year.*

/ Artkala

Sneha, Puja, and Pawan were in school when their family fell into financial difficulties. The siblings from Bihar wanted to help their parents by contributing to the household finances. That is what motivated them to look towards YouTube. Their YouTube channel, Artkala, with over 40 lakh subscribers, is all about ideas and techniques to repurpose waste materials, like plastic bottles, into decorative pieces.

Once, around Diwali, they posted a DIY video about making lamps. It turned out to be the break they were waiting for. They diligently built and nurtured their channel over the next five years, and started making a substantial earning each month. Today, the siblings have left their financial troubles behind. Through the DIY ideas explained in their videos, they have helped many of their viewers start small businesses of their own.



“Our family’s finances weren’t great and YouTube felt like something we could explore even with our monetary constraints. But we never could have imagined the love that our channel got. Very soon we got our first paycheck from YouTube. A lot has happened since. We earn a lot more now—enough and more to live better. We have an office now, and an even bigger team. All thanks to YouTube.”



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Creative entrepreneurs comprise YouTube creators with at least 10,000 subscribers to their largest channel, and those with fewer subscribers who earn money directly from YouTube, earn money through their YouTube videos from other sources, and/or permanently employ others in support of their YouTube activities.

* Data provided by YouTube as of June 2021.



HELPING INDIAN BUSINESSES THRIVE

YouTube is a valuable tool for Small and Medium-sized Businesses (SMBs) across India. It serves as a catalyst for revenue growth, enabling SMBs to better connect with their customers and reach new markets overseas, and boosts the productivity of their workforce through better access to information and training materials.

90% of SMBs with a YouTube channel agreed that YouTube played a role in helping them **grow their customer base.**

87% of SMBs who advertise on YouTube agreed that **YouTube ads have helped them grow sales.**

88% of SMBs who use YouTube find the ease of access to information on YouTube **makes their employees more productive.**

93% of businesses with a YouTube channel agreed that being on YouTube **helps customers find their business.**



/ [InteriorMaata](#)

Ananya began her journey as an interior designer in Vadodara in 2017 with her first YouTube channel. Her business was doing well, when the onset of the COVID-19 pandemic suddenly slowed things down. She used the opportunity to rethink and rebuild her existing business into a virtual operation and leveraged her YouTube channel "InteriorMaata" to connect with her customers.

She posted home-makeover videos and tips on interior design, and became well known for her helpful videos on minimal, sustainable home décor. As the channel rose in popularity, with over 7 lakh subscribers, she received hundreds of requests to expand her services, and the channel acted as a strong lead generator for her business.

Using her YouTube channel, she built a client base from smaller towns, among customers with less access to interior designers, locally. Wanting to break the stereotype that interior designing is meant only for a certain economic cohort, she started providing relatable design options within the customer's desired budget. Her studio served more than 80 clients in the first year of launching her channel, using nothing but YouTube videos to share her work with customers.

“I can't stop thanking YouTube enough because it has been a great tool to help me build not only my business but who I am today. Every customer lead I generate is from my YouTube content. It has helped us grow and scale. We are expanding our business beyond Vadodara to all of Gujarat, as well as Mumbai, Pune, Bangalore, Kolkata, and Hyderabad.”



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ENRICHING CLASSROOM EDUCATION

Parents, students, and teachers recognise the benefits of YouTube as an educational tool, both inside the classroom and beyond. The platform democratises access to learning in India, by providing free and engaging educational content to households across the country.

94% of students (aged 18+) who use YouTube reported using YouTube to support their assignments or personal study.

81% of teachers who use YouTube agreed that YouTube gives students the flexibility to **learn at their own pace**.

91% of parents who use YouTube, and have children aged 13-17 who use YouTube in class or for homework/assignments, agree that YouTube **helps their children learn**.

/ Don't Memorise

Ganesh Gopal Pai was working as a math teacher for TutorVista when he realised the need for imparting high quality online learning resources to students in India. As a result, he launched Dontmemorise.com in December 2013, a video content platform to help students learn complex concepts in maths and science. To expand the reach of his content, he started his YouTube channel in January 2015 with the goal of garnering a million views in the next three to four years. Little did he imagine that by 2021, his YouTube channel would garner over 20 crore views in total and over 23 lakh subscribers.

YouTube has become one of Ganesh's most effective marketing channels and the visibility he got from YouTube helped him license his content to various EdTech companies (Vedantu, Oxford University Press etc.) in India, who could then use this content to educate more kids. While ad revenue and the YouTube Learning Fund helped him create even more content for his students, his presence on YouTube also helped him sell affordable micro-courses through DontMemorise.com.



“YouTube has not only helped me achieve my dream of educating millions of learners but has also helped me establish my own business. I've also been able to sell affordable micro-courses to students through my website DontMemorise.com. I truly believe that YouTube is the only platform out there that can help me democratise education.”



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ENCOURAGING LIFELONG LEARNING AND SKILLS DEVELOPMENT

Users come to YouTube in search of practical skills and knowledge, accessing learning opportunities that might otherwise have been out of reach. Many Indians see YouTube as a vehicle for self-improvement and a tool to progress their careers, thus boosting their employment prospects.

98% of users said they use YouTube to **gather information and knowledge.**

59% of users who have actively looked for a new job in the last 12 months **use YouTube to help them develop new skills for the job market.**

63% of users often come to YouTube for **developing a practical skill.**



Neeraj Chopra

**Tokyo 2020 Olympic Gold Medallist
in Javelin Throw**

Neeraj Chopra's story is one of a young, determined athlete from India's hinterlands who grew up to become an Olympic champion. Hailing from a large farming family with no background in sport, Neeraj was encouraged to follow his interest in Javelin from a young age. An athlete has to work hard and learn from each performance. YouTube gave Neeraj Chopra an opportunity to learn about things that he did not have easy access to. Having picked up javelin with the help of a few senior athletes, Neeraj took to YouTube to hone his skills and throwing technique. He leveraged YouTube to learn from international athletes and pick up skills from the world's best. With time, Neeraj started climbing up the ranks. Having made his mark on the global stage, he used YouTube to watch past competition videos, observe his own form, and make improvements wherever needed. It is this dedication that helped him win a gold medal at his debut Olympics and become a role model for India's youth.

“It is no secret that being an athlete requires tremendous hard work, patience, and effort. On YouTube, I found a platform to bring the world of javelin to me. For me, it was a great introduction to the game's legends, watching training and competition videos, and picking up skills.”



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SUPPORTING INDIA DURING THE COVID-19 PANDEMIC

Many Indian households have relied on YouTube to navigate the unprecedented pressures of the COVID-19 pandemic. YouTube has helped students continue their education, enabled businesses to maintain contact with their consumers, and provided households with a trusted source of information.

79% of users agreed that YouTube had a **positive impact on their mental health or physical wellbeing** since the start of the COVID-19 pandemic.

69% of users said YouTube has been a **reliable source of information** since the start of the COVID-19 pandemic.

79% of parents who use YouTube agreed **YouTube has been helpful for their kids** since the start of the pandemic.

70% of SMBs believe that YouTube has helped them **sustain their business** during the COVID-19 pandemic.

/ **Apollo Hospitals**

Apollo Hospitals is a large, multispecialty hospital chain. It includes some of the most renowned multispecialty clinics in India, with hospitals located across most regions. Apollo struck up a partnership with YouTube in 2020, as part of a larger mandate to transmit critical information on COVID-19 and vaccines from subject matter experts to the general public.

During the pandemic's second wave, Apollo Hospitals used their YouTube channel, with nearly 3 lakh subscribers, to release hundreds of videos covering topics related to vaccinations, COVID-19 treatment and prevention, and pandemic-appropriate behaviors in more than eight local Indian languages

These videos provided critical information in line with the country's latest local health guidelines. Millions of users across India thus had access to trusted, fact-based information in familiar regional dialects and were able to easily find this information on youtube.com/covid19 and on Apollo Hospitals' YouTube channel.



“The partnership with YouTube enabled Apollo Hospitals to amplify its reach, share medical expertise, and counter misinformation beyond geographical limitations during a most critical period for the nations.”

Gaurav Phogat, Head - Digital Marketing,
Apollo Hospitals



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INSPIRING THE DISCOVERY OF INDIAN TRADITIONS

YouTube creators share their unique perspectives with their audiences, which helps propagate diverse customs and traditions across the country. The platform serves as a freely accessible repository of culture, enabling Indians to stay connected to their cultural heritage, enjoy content in their preferred languages, and learn more about traditions from other parts of the country.

69% of users agreed that they have **discovered videos from other states or cultures in India** on YouTube that they cannot find elsewhere.

67% of users agreed that they have **learnt about their cultural heritage and traditions** on YouTube.

75% of Indian users agreed that they can **easily access videos in their preferred language** on YouTube.

94% of music and media companies with a YouTube channel agreed that YouTube is **essential for breaking undiscovered artists**.



/ **Tetseo Sisters**

Imagine the language you love—the language of your songs—gradually fading into extinction. A few years ago, this was the fate of Chokri, mother tongue of the Tetseo sisters—Mercy, Kuvelu, Azi, and Lulu. They realised that their language and their music needed a permanent medium and quickly found out that YouTube offered them the ideal platform.

Their YouTube channel, dedicated exclusively to Chokri music, re-introduced the language beyond the borders of the Tetseo sisters' home state, to captivate audiences looking to discover this heritage. Viewers communicated their appreciation by posting comments, likes, shares, and by becoming subscribers. The sisters improved with each performance, learning from other artists they connected with through YouTube.

Today, the Tetseo Sisters are cultural icons in Nagaland and the rest of the country, and their YouTube channel, with over 55,000 subscribers, is making sure that their language will live forever in their videos.

“YouTube has helped us grow as performers and given the space to our purpose of preserving our dialect and the folklore of our land. Once we started our channel with folk-fusion music, innumerable doors opened up for us. We can comfortably say that our dialect Chokri, far from being lost, is now known to a lot of people. YouTube has been a great reservoir for our culture.”



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EXPORTING INDIAN CONTENT TO A GLOBAL AUDIENCE

YouTube is a gateway for Indian creativity to reach new global audiences. Indian creators have achieved vast international success through the platform, which serves to amplify and advertise Indian culture overseas. It also serves to boost international sales for Indian entrepreneurs.

79% of creative entrepreneurs agreed that YouTube helps them **export their content to international audiences** they would not otherwise have access to.

+15% of watch time on content produced by channels in India comes from outside of India.*

95% of music and media companies with a YouTube channel agreed that YouTube played a major role in **growing the international popularity of Indian music.**

92% of SMBs with a YouTube channel agreed that YouTube helps them **reach new audiences across the world.**

/ Armaan Malik

Armaan Malik is an Indian pop star and playback singer from Mumbai, with over 25 lakh subscribers. He performs in many Indic languages, including Hindi, English, and Telugu. His Telugu song, 'Butta Bomma', has had nearly 70 crore views on YouTube. The democratisation of the music industry has allowed Indian artists from across India to flex their creative muscles around the world.

Over the years, Armaan has seen a strong growth in his YouTube presence and built a global fan base with his chart-topping releases. And, with independent artists gaining access to a global stage for their music, there has been a resurgence in the Indian pop industry that has been generating success stories from even the far corners of the country.

Armaan could now be described as a global superstar. His international releases, 'Control' with 2.8 crore views, and 'Echo' with 2.6 crore views, were global hits. Armaan is also an engaged artist on YouTube, leveraging multiple fan engagement features such as Premieres, Community and even a live collaboration with Eric Nam and KSHMR for the launch of Echo, which found its place on music charts across the globe.



“For the past two years, I've devoted a major chunk of my time to my international project, which is very exciting. I can't thank YouTube enough for the constant innovation, the product, and tools that they introduce from time to time that enable creators like me to achieve so many of my goals.”



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* Data provided by YouTube as of June 2021.

METHODOLOGY Q&A

How did we estimate the GDP contribution of YouTube's creative ecosystem?

The total pay-out from YouTube in 2020 was estimated using results from our survey of India-based YouTube content creators and published information on music industry revenues.

We estimated the direct GDP contribution of creative entrepreneurs by subtracting intermediate costs from revenue associated with YouTube activity (i.e. the “production” approach to GDP estimation). The direct GDP contribution of music and media companies was estimated by applying a standard GDP:output ratio to the pay-out estimates.

We then used an “input-output” model—in essence, an accounting tool showing who buys what, and from whom, in the Indian economy—to estimate both the supply chain (indirect) impact and the “income multipliers” from which we derived the induced impact.

Our results are presented on a gross basis. In other words, they do not consider what the resources used by content creators, or stimulated by their expenditure, could alternatively have been deployed to do.

Do the results exclude any activity connected with YouTube?

Our estimates exclude the economic contribution of YouTube's own operations, and the benefits that businesses receive from increased sales as a result of advertising on YouTube.

How did we estimate the total jobs supported by YouTube?

Full-Time Equivalent (FTE) jobs supported amongst creative entrepreneurs were estimated from survey responses relating to the weekly hours spent working on YouTube. We only included responses from creative entrepreneurs who spend at least eight hours per week working on YouTube. Jobs supported amongst creative entrepreneurs' permanent employees were also estimated from the survey responses.

Jobs supported by media and music companies, and through indirect and induced impacts for all types of creator, were estimated by applying productivity assumptions to the GDP results.

Note: Case studies presented in this document are supplied by YouTube.

ABOUT OXFORD ECONOMICS

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on more than 200 countries, 250 industrial sectors, and 7,000 cities and regions.

Headquartered in Oxford, England, with regional centres in New York, London, Frankfurt, and Singapore, Oxford Economics employs 450 full-time staff, including more than 300 professional economists, industry experts, and business editors.

Our global team is highly skilled in a full range of research techniques and thought leadership capabilities from econometric modelling, scenario framing, and economic impact analysis to market surveys, case studies, expert panels, and web analytics.

Oxford Economics is a key adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base now comprises over 2,000 international organisations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.