

# Assessing the economic, societal, and cultural impact of YouTube in Australia in 2021



# Foreword by Oxford Economics

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Our research into the impact of YouTube in Australia shows that the platform has extended far beyond its origins as entertainment, to become a widely-used tool for a diverse community of users, businesses, and creators. At a time of transition and uncertainty for many Australians, YouTube proved a valued source of information during the pandemic<sup>1</sup> and this year's federal elections.<sup>2</sup> YouTube also supports Australia's multicultural and diverse society to thrive, providing a home for minorities to identify with others and engage in wider society.<sup>3</sup> Over half of the creators in this year's research agreed that YouTube gives underrepresented voices a platform.<sup>4</sup>

Oxford Economics worked closely with YouTube in the second quarter of 2022 to develop a rigorous approach to measuring the video platform's economic, social, and cultural impact across Australia. Our study quantified jobs and GDP outcomes and examined the ripple effects on adjacent industries and individuals' quality of life. We surveyed 501 creators, 3,834 users, and 516 businesses across the country, with additional qualitative interview input, to glean insights into how the platform is contributing across their day-to-day lives.

YouTube's economic, societal and cultural contribution to Australia extends beyond its borders. The platform supports the telling of Australian stories to the world and gives Australian creators the opportunity to export their voices. A representative from an Australian music and media company we interviewed said "YouTube has enhanced the cultural life of our country because it is a platform that allows anyone to publish anything for free...YouTube encourages local artists to globalise their content". The following pages demonstrate the increasingly valuable role YouTube plays across different levels of Australian society. Users benefit from the wealth of information available to both educate and inform, while businesses and creators reap rewards from the global platform that YouTube gives them.



**Adrian Cooper**  
**Chief Executive Officer**  
**Oxford Economics**

<sup>1</sup> 59% of Australian Users answered "Agree" and "Strongly agree" to the statement "YouTube was a reliable source of information during the Covid-19 pandemic" (Q27)

<sup>2</sup> 53% of Australian Users answered "Agree" and "Strongly agree" to the statement "YouTube was a timely source of information during the 2022 Australian federal election" (Q28)

<sup>3</sup> CNN, 'Australia is asking its people one question and it's not whether to keep the King', 14.09.2022

<sup>4</sup> 51% of Australian Creators answered "Agree" and "Strongly agree" to the statement "YouTube gives underrepresented voices a platform" (Q4a; N/As excluded)

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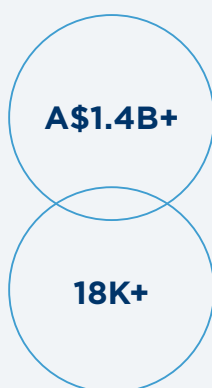
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# Executive Summary

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In Australia, YouTube democratises the opportunity to create, learn and earn. It is a place for anyone to learn new skills, explore topics of interest, be informed or experience our country's rich cultural diversity. A source of economic opportunity for many, it's a multi-format platform to help businesses grow and is home to a diverse creator economy that contributes to GDP and job creation. Whether upskilling, expanding their education or starting a business, YouTube reflects the core Australian value of a 'fair go' - giving individuals from all parts of the country an equal opportunity, no matter their beginnings. YouTube allows creators to grow their audience outside of Australia, exporting the best of Australian culture and creativity to the world.



YouTube's creative ecosystem contributed over A\$1.4B to Australia's GDP in 2021.

YouTube's creative ecosystem supported more than 18K full-time equivalent (FTE) jobs in Australia.



### Economic Impact

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YouTube is a platform on which anyone in Australia can start a channel, helping to democratise entrepreneurship.

YouTube gives businesses in any industry a powerful marketing platform to reach an audience and gain new customers.

Anyone can create a YouTube channel and have the opportunity to join the creator economy, earning an income from sharing their talent, knowledge and expertise with the world.



### Cultural Impact

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YouTube provides new avenues for creators, as well as aspiring musicians, to break into the industry and is a platform for local creators and artists to connect with global audiences.

YouTube provides a platform for Australian media organisations and sporting codes to share content with local audiences and connect with viewers around the world.

YouTube is a place where anyone, anywhere can celebrate their unique identity and share their experience.

Creators are diverse cultural ambassadors, helping to enrich Australian culture and share what Australia has to offer with the world.



### Societal Impact

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YouTube enables Australians to take learning into their own hands, giving them the ability to learn new skills, follow their passions and develop economic opportunities for themselves.

Teachers, students and parents are increasingly recognising YouTube as a beneficial addition to traditional learning.

Each day, Australians turn to YouTube to stay informed on current affairs and find authoritative information from trusted sources.

# YouTube Contributed Over A\$1.4B to the Australian Economy in 2021

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The YouTube community generates significant economic value in Australia—not just for creators but also for businesses, users and workers across the country.

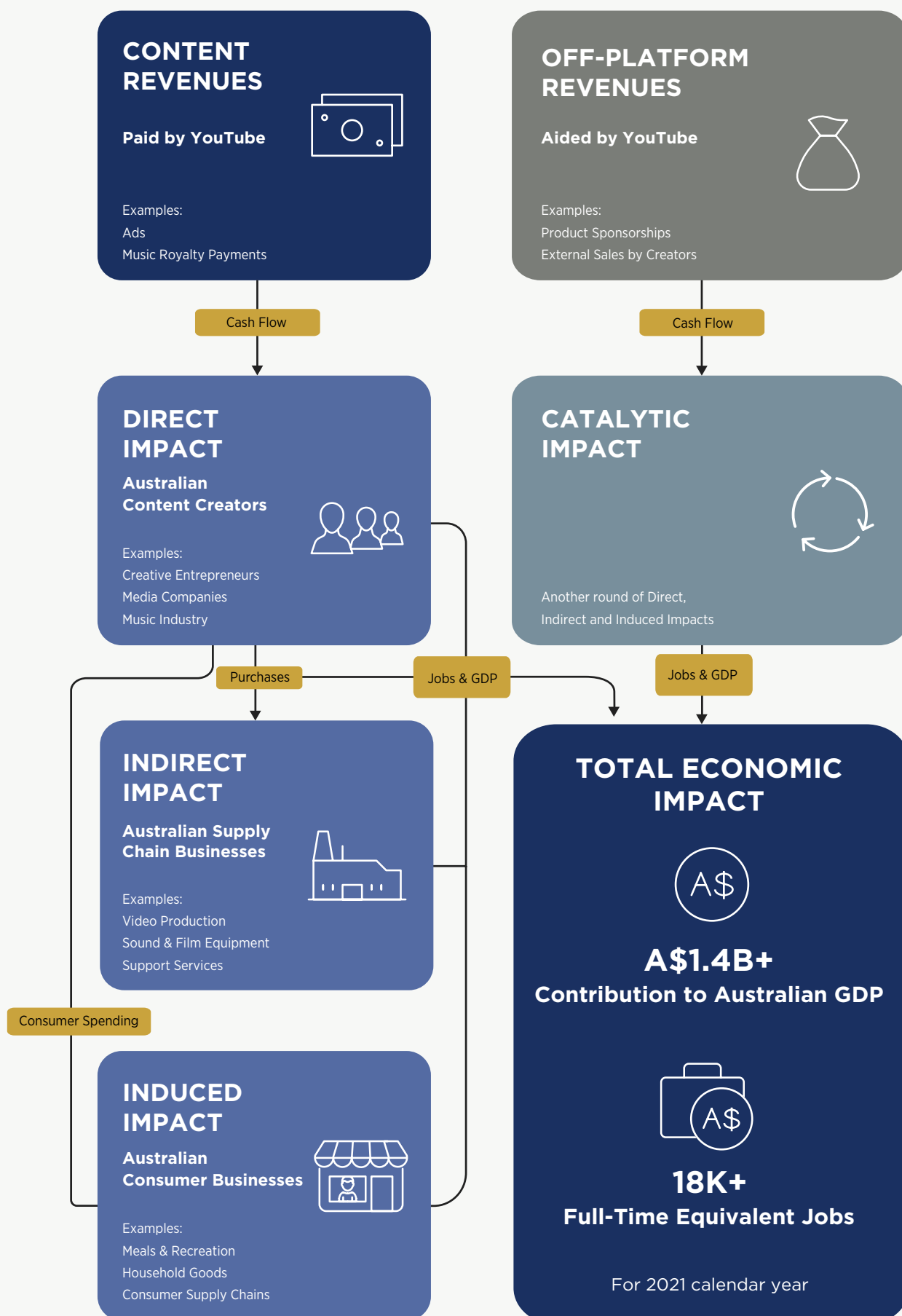
A principal source of YouTube’s economic impact is the revenue the platform redistributes to artists, creators and media companies, and the advertising-derived royalty payments it makes to the music industry. We refer to the profits and earnings of those creators as the YouTube ecosystem’s direct economic impact in Australia.

In creating 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 workers employed in 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.

# Total Economic Impact



# Growing Australian Businesses

YouTube is a source of learning, entertainment and information for users around the world, and today, we see more Australian businesses tap into the platform's reach to optimise their marketing, grow their customer base and drive effective results. From e-commerce entrepreneurs, to musicians, to a local lolly shop, YouTube gives small to medium businesses (SMBs), large organisations and entrepreneurs in a variety of industries a powerful platform to build an audience and gain new customers.

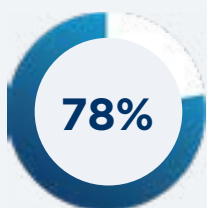
While COVID-19 restrictions changed the way Australians shopped in 2021, YouTube played a vital role in helping businesses sustain their operations during the pandemic and even grow their customer base at home and abroad. This has provided more export opportunities to Australian businesses than they would traditionally have access to, creating a ripple effect that further benefits the local economy.



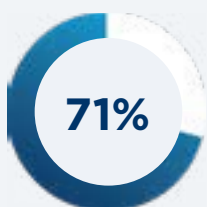
**YouTube helps us to expand our customer base. International students visit our channel to gain more insights into universities, and Australian culture. They watch videos where students get involved in daily student life activities in the country.**

**Having a channel on YouTube is essential. YouTube has pushed us to attract more students and create awareness about our agency. If you invest more in the channel, it may be possible to gain more leads from the same platform.**

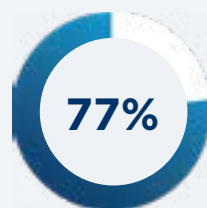
— Director of International Marketing, Consulting agency providing advisory services on studying abroad in Australia



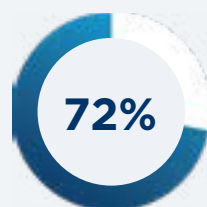
78% of SMBs with a YouTube channel agree that YouTube played a role in helping them grow their revenue.



71% of SMBs who use YouTube agree that YouTube is essential to their business growth.



77% of SMBs with a YouTube channel agree that YouTube played a role in helping them grow their customer base by reaching new audiences.



72% of SMBs who use YouTube agree that YouTube has helped them sustain their business during the COVID-19 pandemic.



### **From Beach-Side Start-up to International Success**

Burleigh Heads-based fashion brand, Princess Polly, leveraged YouTube to increase its reach and maximise conversions, helping the business go from beach-side start-up to fashion retailer and online powerhouse.

Princess Polly began in true start-up fashion – picking and packing orders out of a beach-side apartment on Australia's Gold Coast. Wanting to grow the business and target a new and broader audience, a customer survey found that one-third of Princess Polly's customers spent time on YouTube daily, spurring the brand to integrate YouTube as part of its marketing strategy.

YouTube gives Princess Polly the opportunity to connect directly with customers wherever they are located. Growing the subscriber community opened the door to more customers and resulted in real conversions for the brand. Thanks to new ad formats, keyword targeting and shopping extensions, Princess Polly was able to reach the right demographic and effortlessly redirect viewers from its YouTube channel to the Princess Polly website to browse and purchase items.

Having a presence on YouTube helped Princess Polly increase brand credibility, brand recognition and form a deeper connection with its customers. Gaining publicity across YouTube's massive user base, today Princess Polly employs a team of 380 across Australia and the US, and sees ROI on YouTube reach 20:1.





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Video is a really important element to connection and for a small business to tell their story through video in an authentic manner, in a way that's accessible, has been incredibly important to the community over the period of time that we've just passed.

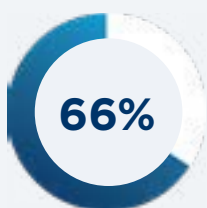
— *Anthea Williams, Head of Strategic Partnerships & Stakeholder Engagement, Australian Chamber of Commerce and Industry (ACCI)*



# The Ripple Effect of Australia's Creator Ecosystem

YouTube is home to a growing community of creators who transform their skills, passions and creativity into viable businesses and significantly contribute to Australia's economy. Australia's thriving creator ecosystem contributes to job creation and the economy, and showcases Australia's rich and diverse culture worldwide.

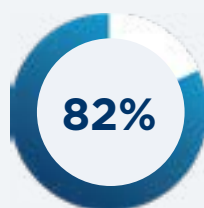
Having a presence on YouTube isn't just about sharing videos. Creators are leveraging the success of their channels to expand into multiple revenue streams through brand partnerships or the creation of products and services – from beauty products to merchandise to TV shows. A creator's success on YouTube creates an economic ripple effect, positively impacting job creation and economic growth. As creators expand, they often hire a supply chain of talent from freelancers to production agencies, helping more people indirectly earn a living from the creator economy, and directly contributing to GDP and job creation.



66% of creators agree that the revenue they receive from advertisements being placed on their YouTube content is an important source of income for them.

>A\$10K

In Australia, the number of YouTube channels making A\$10K or more in their annual revenue is up over 25%, year over year (a/o Dec 2021).\*



82% of creators agree that YouTube provides an opportunity to create content and earn money that they wouldn't get from traditional media.



In Australia, over 250 channels have over 1M subscribers, an increase of over 15%, year over year (a/o Dec 2021).\*



 / [Jazza](#)

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### **Turning Creativity into a Fully-Fledged Business**

Josiah Brooks, aka Jazza, is an Australian YouTube creator, artist, animator, and presenter best known for his art tutorials, challenges and animations. Working as an independent animator and game designer, Josiah launched his first channel, 'Draw with Jazza', with the intention of it one day becoming his full-time job. The channel not only supplemented Josiah's freelance income but helped him get more work through the exposure he was getting from its growing popularity.

As ad revenue from the channel began to significantly increase, Josiah's partner left her full-time job to focus on growing the channel. In 2019, Josiah's ad revenue on YouTube overtook product sales revenue and is now his family's primary source of revenue today.

The channel's success gave Josiah the opportunity to explore multiple revenue streams through brand partnerships and the creation of products and services. From "Draw With Jazza: Creating Characters", a fun and easy guide to drawing cartoons, to "Cartoon it Up", a series of television shorts broadcast on ABC Me, to the app "Jazza's Arty Games", the channel's success created a ripple effect supporting other businesses and industries. Today, Josiah has grown from working in his garage to operating a commercial studio in Gippsland with over 10 employees, including three full-time editors that have allowed him to launch two more YouTube channels, showing the potential, impact and positive knock-on effect of the creator economy.

## Supporting Australian Creators

Skip Ahead, an initiative in partnership with Screen Australia, has played a key role in helping develop the careers of some of Australia's most successful creators including Aunty Donna, Superwog, RackaRacka, and Wengie. Since 2014, the annual program has provided over A\$4.2M in funding to support creators with an established audience on YouTube, expand their production values and unlock new creative opportunities.



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Projects from this initiative have garnered critical acclaim locally and on a world stage, with Adele Vuko and Christiaan Van Vuuren's *Over and Out* awarded Best Short Form Series at Canneseries 2019, and Michael Shanks' *Rebooted* making its world premiere at Austin Film Festival before being nominated for Best Short Film at the AACTA Awards.

— Graeme Mason, CEO, Screen Australia



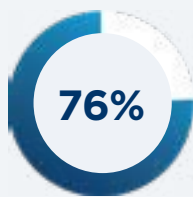
# Showcasing Australian Music and Media On a Global Stage

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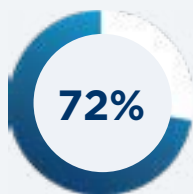
YouTube is an accelerator for the Australian music industry, helping homegrown artists connect with a global audience and enabling aspiring musicians to find and grow their fan base.

With music content accessible to fans around the world, YouTube's global reach offers music labels of all sizes the opportunity to launch domestic artists onto the international stage and reach new audiences. For producers and labels, the platform is an additional resource to scout rising talent, making it easier to find independent musicians. YouTube also provides new avenues for aspiring musicians to break into the industry. Musicians can build an audience simply by uploading their music on YouTube, engaging with fans and gaining exposure, both in Australia and abroad.

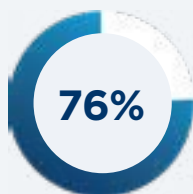
Australian broadcasters and news publishers elect to use YouTube to share breaking news, current affairs, special reports and explainers with local and global audiences. As an open platform, YouTube supports news organisations of all sizes to strengthen relationships between their newsrooms and the audience and to provide informative, educational and entertaining content. As news organisations use YouTube to report the news and reach new audiences, they can generate additional revenue from their news videos from being a part of the YouTube Partner Program.



76% of media and music companies with a YouTube channel agree that YouTube is critical to breaking new artists and/or music.



72% of media and music companies with a YouTube channel agree that YouTube helps them reach new audiences across the world.



76% of media and music companies with a YouTube channel agree that YouTube has increased the supply of creative talent in the industry.



## Inspiring Indigenous Communities with Music



I want to inspire other Aboriginal and Torres Strait Islander kids that they can do anything. A lot of my community cannot afford to have other subscription streaming services, but with free access to YouTube, it is by far the most important platform in my community.

—Miiesha, Singer and Songwriter



## Supporting Australian Music to the World

Since 2019, YouTube has been a proud partner of the Australian Recording Industry Association's annual ARIA Awards, helping to export the event to the world and reach a new audience on YouTube with video-on-demand highlights.



YouTube is such an important platform for Australian artists to connect with local and international fans. Now that live music and international touring is roaring back post COVID, YouTube's role in enabling artists to connect with fans and promote their music through live events, streaming and content creation is more valuable than ever. We also really value YouTube's genuine connection to and support for local artists including through our fantastic partnership on the ARIA Awards.

— Annabelle Herd, CEO, Australian Recording Industry Association (ARIA)







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Sunrise and 7NEWS are two of Australia's most established and trusted news media brands. But through our YouTube channels, we have been able to reach an entirely new audience. A worldwide one. We have seen that with global news events, from war to the death of a monarch, our reporting and original stories connect with viewers far and wide. The growth of our channels in the last few years has been, not insignificantly, due to an international appetite for our quality journalism, and original storytelling. The significance of such a global reach is not lost on us. It has been an incredible way to build our brands and, most importantly, share with a world audience the work of which we are so proud.

Anyone can see each segment on Sunrise, and every report on 7NEWS, anywhere, long after the original broadcast. The reporting lives on, the stories shared and watched online to an audience no longer bound by borders.

— *Stefan Mitchell, Chief of Digital Video, 7News*

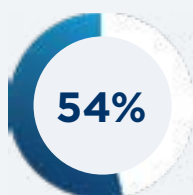


# Amplifying Australia's Diverse Voices

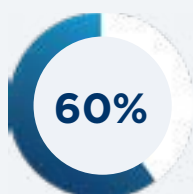
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YouTube is a place where anyone can celebrate their unique identity and share their experiences. The diverse creators, content and communities on YouTube bring a sense of belonging and connection for many Australians.

YouTube is a place where creators of all backgrounds share their stories for greater inclusivity and understanding. It's a place of digital inclusion, where people can tune into storylines that reflect their own lives or find a welcoming community. By tackling social issues, raising awareness, reducing stigma, or sharing their experiences, YouTube helps underrepresented voices from every corner of Australian society find a place to belong.



54% of creative entrepreneurs agree that YouTube gives underrepresented voices a platform.



60% of creative entrepreneurs agree that they identify and feel like they have a place to belong on YouTube.



## / [Black as Web Series](#)

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### Sharing Outback Adventures with the World

The Black As Web Series centres around the daily lives of three Yolngu (/ˈjɒŋɡu/) men, Chico Wanybarrnga, Jerome Lilipyana, Dino Wanybarrnga, and their Scottish-born accomplice, Joseph Smith. Hailing from the indigenous community of Ramingining, east Arnhem Land, the semi-scripted online series follows the four brothers' adventures in the outback of Australia's Top End.

Across croc-infested waters and the wild Australian outback, each episode is a journey defined by obstacles and hurdles - their every movement is dictated by the tides and frustrated by flooded creeks and fallen trees. With tireless persistence and legendary humour, the four brothers battle through it all together.

With over 27 million views, the series is a celebration of Australia's diversity and the brothers hope to give their audience a sense of Yolngu culture and the relationship between black and white. With each episode the audience gets a deeper insight into the rich history of Aboriginal culture, with many laughs along the way.

## Supporting Future Talents from Underrepresented Backgrounds

Launched in 2021, the YouTube Scholarship aims to provide opportunities for aspiring NIDA students from backgrounds historically underrepresented on screen and stage such as those who identify as Aboriginal or Torres Strait Islander. Successful applicants receive direct financial support for their tuition fees and living expenses for the duration of their studies at NIDA.



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YouTube's scholarships with NIDA that support creatives from under-represented backgrounds to help nurture the future leaders of the industry have made a great impact over the last few years. The accessibility of YouTube allows a wide and diverse range of options for content creators and storytellers, enabling an array of stories to be told from many different people and in many different ways.

— Liz Hughes, CEO, National Institute of Dramatic Art (NIDA)



# Exporting the Best of Australia to the World

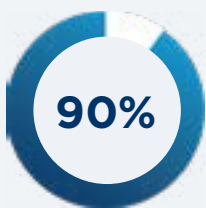
Each day, Australian YouTube creators help to promote everything Australia has to offer to the world. More than creators, they're social and cultural ambassadors. Whether sharing its sporting excellence and world-class sports events, or the diverse beauty of Australian landscapes and the hallmark relaxed attitude to life, local creators are showcasing the best of Australia to their global audiences every day, helping to enhance the country's influence and reputation around the world.

As more of Australia's diverse creators produce authentic, inspiring, and entertaining content, YouTube continues to be an effective platform to drive reputational benefits for Australia while giving creative entrepreneurs a platform to share their passions and skills with a global audience.

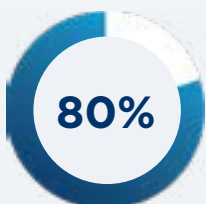


**YouTube has enhanced the cultural life of our country because YouTube is a platform that allows anyone to publish anything for free, and I believe it is an excellent place to kick-start a career in the music industry. YouTube encourages local artists to globalise their content.**

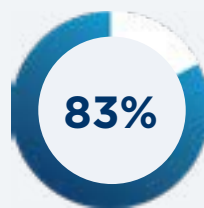
*- Senior Marketing Manager, Australian media and music production company*



Over 90% of watch time on content produced by channels in Australia comes from outside of Australia (a/o Dec 2021).\*



80% of creative entrepreneurs agree that YouTube is an essential platform to earn a global presence.



83% of creative entrepreneurs agree that YouTube helps them export their content to international audiences they wouldn't otherwise have access to.



In Australia, over 2K channels have over 100K subscribers, an increase of over 20%, year over year (a/o Dec 2021).\*

\* Data provided by YouTube



### **Bringing the World Closer to Australia's Flora and Fauna**

Miller Wilson brings people closer to nature by sharing his Australian outdoor adventures with the world. Through his YouTube channel, the keen explorer captures his explorations and encourages others to get out there and appreciate the unique Australian wilderness. Sharing content with over 1.37M subscribers, his videos help to boost social media coverage for brand Australia and inspire visitors to discover the country for themselves. His reach has enabled him to work alongside Australian nature conservation organisations to make education fun and engaging, reignite people's passions for the outdoors, and create an awareness and understanding of nature in Australia's backyard.





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We have a massive and ever-growing library of high-end Tennis and Australian Open video content. Our YouTube channels allow us to instantly publish this content to reach a global audience ensuring that from grassroots to Grand Slams, our stories resonate around the world.

— *Xavier Muhlebach, Head of Original Content, Tennis Australia and Australian Open*



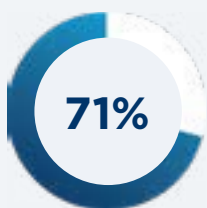


# A Place for Learning for Every Australian

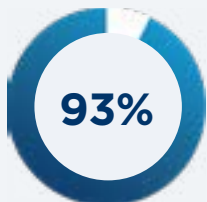
YouTube enables Australians to learn new skills, follow their passions and develop economic opportunities for themselves. Many Australians turn to YouTube every day for how-to videos on practical tasks.

As a global, free resource, educators, students and parents are increasingly recognising YouTube as a beneficial addition to traditional learning. During the unprecedented COVID-19 pandemic, more teachers turned to YouTube as a medium to further explain materials and support the online learning of students.

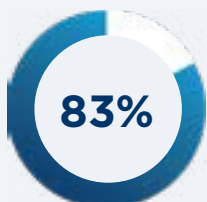
Online learning offers a flexible, efficient, and accessible way for anyone to learn something new regardless of age or location. It gives Australians the chance to upskill, change careers or follow their passions to new opportunities. From learning to code to cosmetology to mastering cooking skills, people in every corner of Australia can seize the opportunity to learn something new, pursue their dreams and create economic opportunities for themselves.



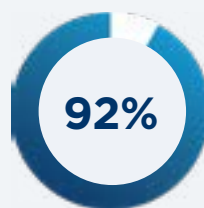
71% of users agree that YouTube provides equal opportunities for everyone to learn and grow.



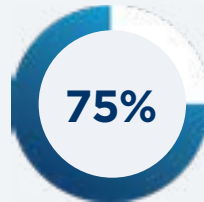
93% of users report they learn how to fix practical problems on YouTube.



83% of parents who use YouTube agree that YouTube (or YouTube Kids for children under 13) helps their children learn.



92% of users report using YouTube to gather information and knowledge.



75% of teachers who use YouTube agree that YouTube helps students learn.





## / [Engineering with Rosie](#)

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### **Inspiring a Clean Energy Future**

Mechanical Engineer, Rosie Barnes, has worked with renewable energy and other clean energy technologies for nearly 20 years. At the start of the pandemic, Rosie started the “Engineering With Rosie” YouTube channel to share her passion and knowledge for all things clean energy. With more than 50,000 subscribers and more than 2.2 million views, her videos about renewable energy engineering and other technologies help people better understand what a clean energy future looks like.

Using her channel to inspire and empower, she helps more people understand promising renewable technologies, the challenges faced and how engineers are solving them, and inspires girls to become the next generation of engineers and pursue careers in STEM (science, technology, engineering, and maths). From “How does it work?” videos on wind turbines and thermal energy storage to technologies to decarbonise mining and industrial processes, Rosie’s informative and educational videos are watched around the world by those with a curious mind, passion for renewable technology or looking to minimise their environmental impact. Sharing the sense of optimism and progress she gets from her job each day, through the channel she has built an engaged audience and community who share her passion.

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By taking a more considered approach to our YouTube channel, creating fit for purpose content that has a specific audience in mind, we've seen a lift in our channel's performance. We see huge potential in it to reach audiences that we can find difficult to connect with on other social channels and look forward to seeing where we can take it.

— Jen Lofgren, Head of Content and Creative Services, Griffith University

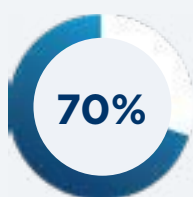


# A Resource for Helpful and Authoritative Information

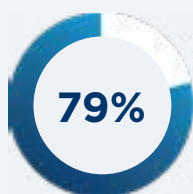
More than just a place for entertainment, each day people across Australia turn to YouTube to stay informed and up-to-date with current affairs. Users can turn to authoritative channels to find credible information on a range of topics.

Authoritative sources – from government institutions to national media – leverage YouTube to share the latest information and content. Using YouTube’s vast reach, official channels disseminate resources that help Australians from all walks of life stay informed on key topics, from election results to COVID-19 updates.

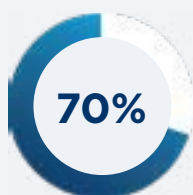
On YouTube’s part, there are also features and policies to help limit the spread of misinformation. These include raising up relevant videos from authoritative sources through features such as the Breaking News shelf that promotes relevant videos from authoritative local news sources about news events of national importance on the YouTube homepage. YouTube also removes content that violates its misinformation policies, including its specific policies on elections and vaccine misinformation.



70% of users who searched for health content on YouTube agree that YouTube provides access to authoritative health information.



79% of users agree that YouTube has been helpful during the COVID-19 pandemic by providing access to timely and/or authoritative information.



70% of users who searched for election information online in the last 12 months have searched YouTube for election information.

### **Making Medical Information More Accessible**

Australian physician Armando Hasudungan Faigl is a trainee physician at Prince of Wales Hospital and an aspiring rheumatologist. Since 2012, he's shared video tutorials and medical illustrations, amassing an audience of over 2.17M subscribers and using his passion for medical teaching to help millions of students around the world. Using a hand-drawn style that sees the use of a marker on paper and later pen on tablet, Armando's interactive illustrations explain the workings of the human body, the impact of medicines and the make-up of diseases, from the basics of anatomy and physiology to the more complex biochemistry and immunology.

With more than 163 million views on his channel, his signature clear visual style and accessible language ensures that both medical professionals and those with an interest in healthcare can easily understand him. Simplifying even the most complex concepts, Armando is passionate about giving anyone the information and tools they need to help their patients - from medical students in university to health professionals and advanced clinicians.





YouTube provides the ABC with a platform to drive discovery and awareness of its content and to reach younger audiences with trusted news and information. Over the past year, the ABC has seen growth in YouTube watch time driven by increasing engagement with live streams from the ABC News Australia channel and full episodes of current affairs programs such as Foreign Correspondent, Four Corners and Australian Story on the ABC NEWS In-Depth channel. ABC News Australia and ABC News In-Depth channels each reach an average of 6 million+ monthly unique viewers.

— Scott Gamble, Head of Social Media, Australian Broadcasting Corporation (ABC)



# GLOSSARY OF TERMS

## **YouTube's Creative Ecosystem**

YouTube supports an ecosystem of creators who earn revenues both on and off the YouTube platform. This ecosystem also encompasses creators' employees, as well as businesses and freelancers in their supply chains that earn a substantial portion of their revenue from creators.

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### **Creator**

Anyone who uploads one or more videos of any subject matter to YouTube, whether they earn revenue or not as a result.

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### **Creative Entrepreneur**

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

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## **User**

Anyone who views video content on YouTube for any purpose, at least once a month.

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## **Business**

The types of businesses included in the analysis vary according to claim. Our business survey gathered insights from businesses that own a YouTube channel; those that advertise on YouTube; and those that use YouTube for other reasons, such as staff training. Note that these groups are not mutually exclusive and a business may fall into two or more of these categories.

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### **Small to Medium Business (SMB)**

A business with less than 300 employees.

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# METHODOLOGY Q&A

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

The total pay-out from YouTube in 2021 was estimated using results from our survey of Australian-based YouTube content creators and published information on music industry revenues.

Off-platform revenues for creative entrepreneurs were estimated from the survey of Australian creators, and off-platform revenues for music and media companies were estimated from business survey responses.

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

We then used an “input-output” model—in essence, a table showing who buys what, and from whom, in the Australian economy—to estimate both the supply chain (indirect) and worker spending (induced) impacts.

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 survey responses.

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

Note: The case studies presented in this document were provided by YouTube.

## About Oxford Economics

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Founded in 1981, Oxford Economics has become one of the world's foremost independent global advisory firms, providing reports, forecasts, and analytical tools on more than 100 industries, 200 countries, and 7,000 cities and regions.

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