

The impact of YouTube in the UK



Foreword

In its short 17 year history, YouTube has played a significant role in reshaping the media and entertainment industry. We have become familiar with “YouTubers”; content creators who have been able to find an international audience and sustain a living, often with the support of an emerging ecosystem of small companies to guide them. This emerging creator economy based on digital platforms sits alongside traditional media companies, providing more opportunities to those seeking to develop a career out of their interests, skills, or passions—as well as providing consumers with a hugely diverse source of content from around the world. For the UK, with a large and mature creative sector, it is particularly important that the sector adapts to these global trends and seizes the opportunities to further consolidate its prominent role in creating innovative and diverse content for a global audience.

As YouTube has matured, it has evolved far beyond its roots as an entertainment platform for digital natives. Users are as likely to turn to YouTube as a source of information on a wide range of topics, and the platform now reaches some 92%

of UK internet users.¹ Consequently, more and more organisations, including small businesses, schools and charities are using YouTube to attract and engage an audience. At a time when many businesses, especially SMEs, are facing rising costs and challenges recovering and adapting to new ways of working post pandemic, YouTube and other digital tools have become increasingly important to their ways of working, from advertising and marketing to training and communicating with customers.

However, while we can see these changes all around us, they are hard to discern in official statistics, as the impacts are so widespread, cross industry sectors, and are often qualitative in nature. Oxford Economics worked closely with YouTube to develop a rigorous approach to measuring the video platform’s economic, societal, and cultural impact across the UK, quantifying jobs and GDP outcomes and analysing the ripple effects on adjacent industries and individuals’ quality of life. In addition to surveying 3,000 YouTube users, close to 1,000 creators, and 500 businesses across the country, we interviewed experts to glean insights into how the platform is contributing to UK society and culture.

Our report shows that over an unsettled period, with political and economic uncertainty and Britain redefining its role on the global stage, YouTube has been widely used as a source of information and education, to engage with a global audience, and as a valuable enabler for many people to achieve their goals. The trends discussed in this report are ongoing and YouTube, along with its digital peers, is facing challenges to keep all its stakeholder communities fully satisfied, and will have to continue to adapt. However, this research confirms the substantial contribution that YouTube is already making to the UK economy, society, and culture and the extent to which its expanding communities of creators, businesses, and the general population value and depend on it.



Andrew P Goodwin

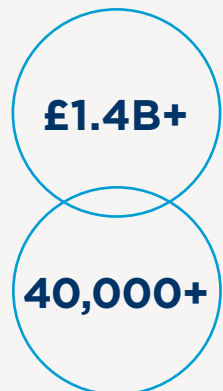
Director of Applied Economics,
Oxford Economics

¹ Source: Ofcom, “Media nations: UK 2022”, 2022, p22 (figure relates to share of UK internet users aged 15+ in Q1 2022).

EXECUTIVE SUMMARY

The Impact of YouTube in the UK

Every day, YouTube helps British users to learn new skills, connect with others, and enrich their lives. It also provides a platform for a diverse range of content creators to share their interests and passions with audiences within the UK and beyond, creating opportunities to build new careers and businesses.



YouTube's creative ecosystem contributed more than £1.4 billion to the UK's GDP in 2021.

YT's creative ecosystem supported more than 40,000 full time equivalent (FTE) jobs in the UK.

A Wealth of Benefits



The Home of Creative Entrepreneurs

YouTube makes it possible for anyone to become a creator and earn money by sharing their interests, skills, and passions with audiences within the UK and internationally.



Driving Cultural and Societal Impact

YouTube's community helps people all across the world to connect with others with similar values, interests, and passions. It provides a place to engage, share information and experiences, and to raise awareness.



Helping Businesses Grow

YouTube helps businesses connect with and grow their customer base, both in the UK and overseas. Its impact has been particularly transformational in media and music, where new creators can publish content without barriers and established players can access new audiences, revenue sources, and talent.



A Place to Learn

British users turn to YouTube to learn new hobbies, solve practical problems, and access a wealth of educational content. YouTube also enables users to keep up to date on the issues of the day.

IMPACT ON GDP AND JOBS

YouTube's contribution to the UK economy

YouTube supports an ecosystem of creators who earn revenues both on and off the 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.

WIDE-RANGING IMPACTS

YouTube provides the infrastructure and tools to enable anyone to become a content creator. From comedians, to teachers, to vloggers, to established players in the media and music industries, YouTube allows creators to reach audiences within the UK and beyond, providing opportunities to launch new careers and businesses, and to access new markets.

Sharing content on YouTube sustains jobs and income within YouTube's creative ecosystem, and wider economic activity that reaches far beyond this. In total, YouTube's creative ecosystem contributed more than £1.4 billion to the UK economy and supported more than 40,000 full-time equivalent jobs in 2021. This economic impact accrues through four channels: direct, indirect, induced, and catalytic.

DIRECT IMPACT

The starting point is the money YouTube pays out to content creators, for example as it distributes a share of the revenue from advertising placed alongside their videos or pays royalty payments to rights owners. YouTube's direct economic impact incorporates the GDP and jobs this income supports amongst creators.

INDIRECT AND INDUCED IMPACTS

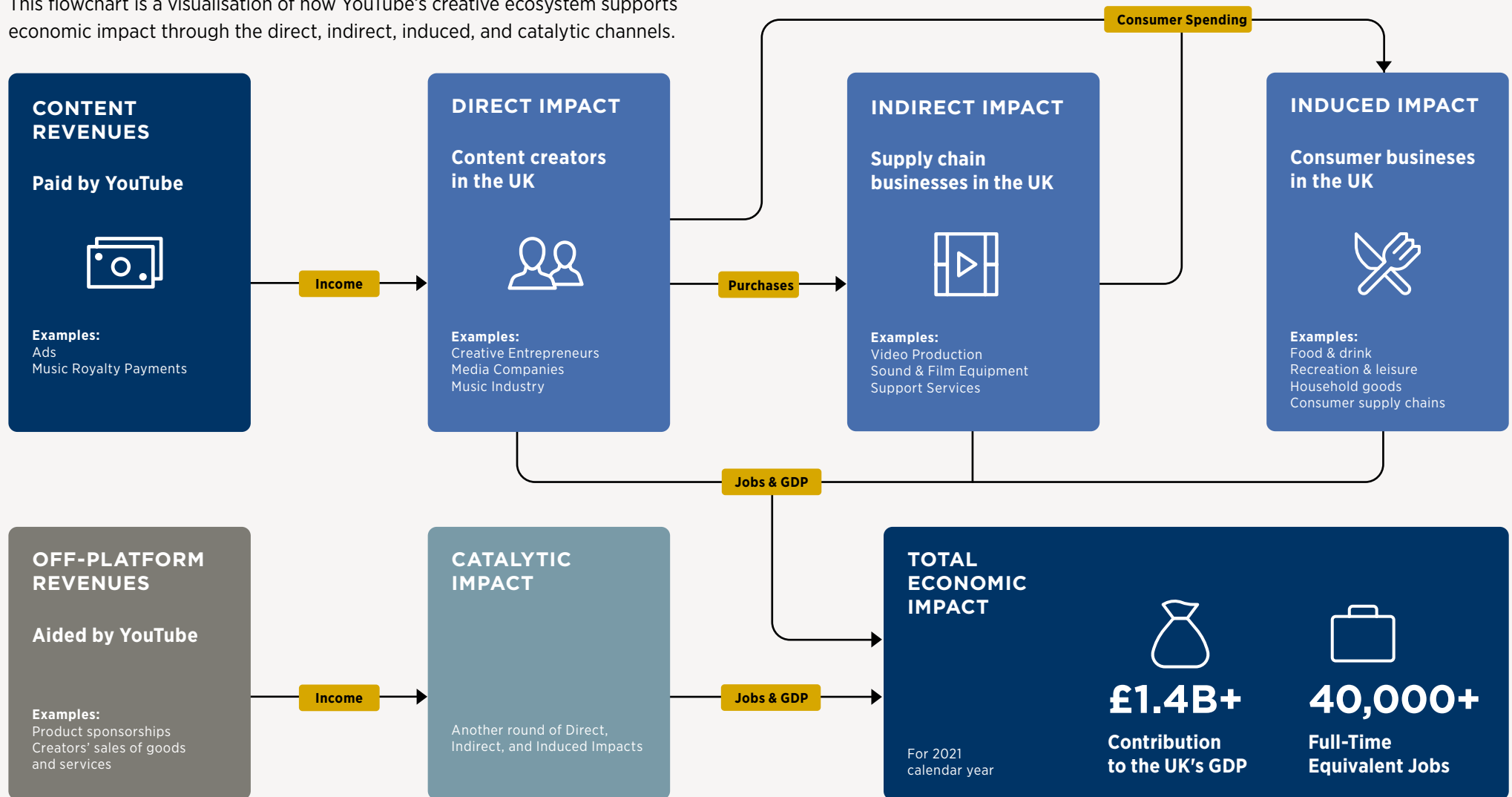
In producing content for YouTube, creators spend money on goods and services in their supply chains, which stimulates an indirect economic impact. In turn, creators and workers in YouTube's creative ecosystem and its supply chain go on to spend their earnings. This spending generates a further induced economic impact.

CATALYTIC IMPACT

YouTube creators also earn revenues from other sources that are helped by their YouTube presence, including product sales, brand partnerships, or live performance engagements. These "off-platform" revenues have a catalytic impact on the UK economy, stimulating further direct, indirect, and induced impacts.

Total Economic Impact

This flowchart is a visualisation of how YouTube's creative ecosystem supports economic impact through the direct, indirect, induced, and catalytic channels.



The Home of Creative Entrepreneurs

YouTube provides a vehicle for British creators to find opportunities and earn income by sharing their interests, skills, and passions with local and international audiences. Thousands of creative entrepreneurs in the UK earn through YouTube, from individuals supplementing their main income, to professional content creators making a living from their YouTube earnings.

The YouTube platform offers access to free support, resources and infrastructure which make it possible for anyone to publish videos, grow an audience, and pursue a creative career.

As well as earning money from YouTube directly, creators can use the platform to help them generate income from other sources, such as brand sponsorships, live appearances, or book deals. This opportunistic system enables creators to sustain income and jobs, not only for themselves, but for networks of collaborators.



“

[YouTube] has a big effect on my earnings and was invaluable during the pandemic as a creative and financial help.

— Creator, 55-64 years old, East Midlands

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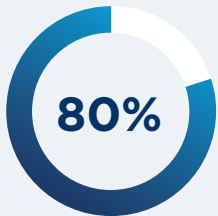
YouTube has given me a career path which simply could not have existed without the platform. It seems the perfect place to use my various skillsets towards one focused goal.

— Creator, 45-54 years old, North West



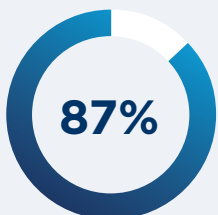
YouTube has allowed me to quit my corporate job to become a YouTuber and found my own fragrance business. YouTube has changed my life.

— Creator, 25-34 years old, London



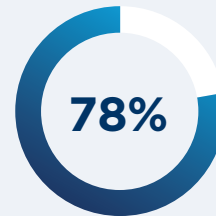
Increasing Opportunities

80% of creative entrepreneurs agree that YouTube provides an opportunity to create content and earn money that they wouldn't get from traditional media.



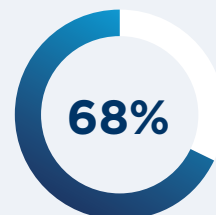
Exporting Content

87% of creative entrepreneurs agree that YouTube helps them export their content to international audiences they wouldn't otherwise have access to.



Building a Global Presence

78% of creative entrepreneurs agree that YouTube is an essential platform to earn a global presence.



A Source of Income

68% of creative entrepreneurs agree that the revenue they receive from advertisements being placed on their YouTube content is an important source of income for them.

/ Mrwhosetheboss

Arun Maini, known to his fans as Mrwhosetheboss, started his channel in 2011, initially uploading smartphone reviews before expanding into all things tech, from laptops to vacuum cleaners. Having launched the channel during his studies, Arun was faced with the difficult decision upon graduating from university of whether to follow a stable career as a management consultant or to devote himself full-time to YouTube. Arun chose to embrace his creative side and set about developing his channel.

A perfectionist at heart, Arun spends around 90 hours developing each 10-20 minute video, including the time needed for drafting scripts, filming, editing, and animating. This perfectionism pays off, as Arun has created a community of tech enthusiasts around his channel, with whom he can share his passion and who regularly share their own experiences with various gadgets in the comments under his videos.

Today, Mrwhosetheboss has amassed 11.4 million subscribers, making Arun one of the largest tech creators on YouTube and in 2021 he won the Technology category at the Streamy Awards.

While his long-form videos provide tech content for enthusiasts, Arun has started attracting more casual viewers through his Shorts channel, using humorous and fun topics that help him reach new audiences. Since starting out in April 2021, the Mrwhosetheboss Shorts channel has gained almost 5 million subscribers and over 2 billion views.

Arun collaborates with leading brands from across the tech industry and his income stems from a mixture of ad revenue and sponsorships. Arun employs six people to work with him on his channel. As a successful entrepreneur, he has broadened his channel to make more ambitious content and engages with his community through giveaways and exclusive unboxings.





In addition to being a creative opportunity, YouTube has also given me incredible financial opportunities. As soon as I found my audience, and started creating content that resonated, my income started to climb dramatically. Enough that I now employ six people full time to help me take my channel to the next level.

— Arun Maini, *Mrwhosetheboss*

Helping Businesses Grow

A YouTube channel can help businesses connect with more customers at home and abroad— increasing reach, driving revenues, and supporting jobs. When business owners share content that informs, educates and entertains, it helps them build an audience that they can convert into customers. And rather than just read product and service reviews, YouTube users can seek out specific content, watch tutorials, and hear directly from the business owner.

The platform also support business growth in other ways, for example by helping firms adapt to the challenges posed by Covid-19, and by providing a way to advertise to different customer groups.

While businesses across all parts of the economy use YouTube, it has had a particularly transformational impact on the media and music industries. YouTube offers a way for new creators to publish their work without any barriers. And for established media and music companies, YouTube can be a promotional tool, a complementary source of revenue, and a unique resource to identify talent and reach new audiences.



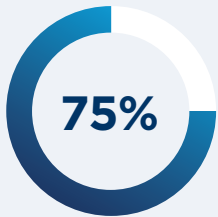
Everything is moving towards digital adoption, and we are also working towards live digital stories and ensuring they are going out at the right time. There is a fascination amongst the specific segments of the population watching YouTube on TV or smartphones or tablets, etc. And we want to take advantage of this trend and leverage it soon.

— Producer, TV and online news company



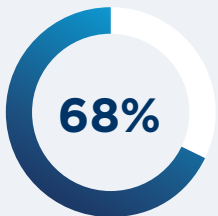
It helps us to launch or promote products, express our brand's "personality", monitor feedback, provide customer service and help our customers spread the word about our business.

— *External Communications Director in the IT and telecoms industry*



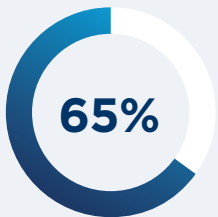
Reaching New Customers

75% of SMBs with a YouTube channel agree that YouTube played a role in helping them grow their customer base by reaching new audiences.



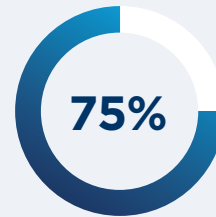
Promoting Growth

68% of SMBs with a YouTube channel agree that YouTube played a role in helping them grow their revenue.



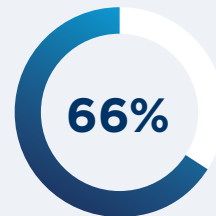
A Place to Advertise

65% of SMBs who advertise on YouTube agree that YouTube ads have helped them grow sales.



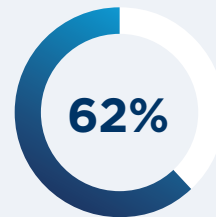
Adapting to New Norms

75% of SMBs who use YouTube agree that their use of YouTube during the Covid-19 pandemic has helped their organisation adapt.



A Global Audience

66% of media and music companies with a YouTube channel agree that YouTube helps them reach new audiences across the world.



Supporting the Media and Music Industries

62% of media and music companies with a YouTube channel agree that YouTube helps grow their overall revenue.

/ The Wall of Entertainment

Joivan Wade and Percelle Ascott began their YouTube journey in 2011. As trained actors frustrated with their choice of roles, they decided to take control of their careers by writing, producing, and starring in their own stories, starting with the viral YouTube series “Mandem on the Wall”.

Despite being offered more opportunities from this success, Joivan and Percelle wanted to retain the autonomy offered by YouTube. They decided to pursue their dream of running an entertainment network, using YouTube as a platform to grow an audience and business. The Wall of Entertainment was born.

Since its launch, the channel has grown exponentially and expanded its remit. Now employing a Managing Director, Tafara Makopa, and 25 full time members of staff, Wall of Entertainment has become a hugely popular channel and has amassed over 5 billion views across its content.

While nurturing the careers of stars including Nella Rose, Yung Filly and Chunkz, the team also supports some of the world’s biggest brands to grow their online communities. For example, the production arm, Wall of Production, works with Foot Asylum on the award-winning series Does the Shoe Fit which has helped the brand’s YouTube channel grow to almost 2 million subscribers in a year, having started with just 6,000.



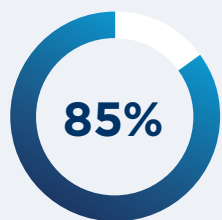


YouTube is our foundation and always has been. We've had our content do incredible views on the platform, reaching up to 85 million, that was a huge achievement. Our aspiration is to one day have our own network, and YouTube has given us the platform to do that, and build all our businesses off the back of it.

— Joivan Wade and Percelle Ascott

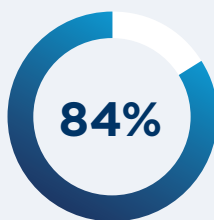
Driving Cultural and Societal Impact

YouTube's accessibility offers opportunities for creators from all backgrounds and all parts of the UK to find a platform to share their knowledge, interests and life experiences. And by helping people all across the globe to connect with others with similar interests, YouTube creates communities of users and creators. In doing so, it can promote dialogue and change by providing a place to engage, inform, raise awareness, and share information.



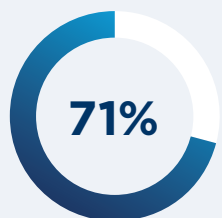
Sharing Ideas

85% of female creators agree that YouTube helps them share their passions and ideas.



A Positive Impact

84% of creative entrepreneurs agree they want to use the influence they discovered on YouTube to make a positive impact on society.



A Place to Belong

71% of creative entrepreneurs agree that they identify and feel like they have a place to belong on YouTube.



YouTube has become a more critical aspect of our volunteering and donor activity. We are a reputed charity and want to reach a newer audience.

— Director for Impact and Effectiveness
at a poverty-reduction charity

/ Lucy Edwards

After becoming blind as a teenager, Lucy Edwards started her journey on YouTube in 2014 when she realised that there were barely any blind creators on social media. Lucy decided she wanted to de-stigmatise disabilities and blindness by using social media to showcase how she lives her life without limits. Through her channel, Lucy aims to educate people and change the perception of disabilities, exemplified by one of her numerous viral videos “How does a blind girl do her own makeup?”.

After becoming immensely popular in 2020, Lucy’s channel has over 650,000 subscribers and has amassed 376 million views. She is a full-time content creator, with YouTube giving Lucy the opportunity to employ her mother, sister, fiancé and management team, who all work together to educate the world on blindness.

Lucy has also been able to reach goals she never thought possible, from speaking about her disability at the “Brilliant Minds” conference, to interviewing A-list celebrities on the red carpet, and landing multiple brand partnerships.

Throughout 2022, Lucy has been working with haircare brand Pantene on making their products more accessible. She has also featured in some of their advertisements on primetime television and has received coverage for her work in national newspapers, such as the Daily Mail and the Mirror, and in magazines such as Glamour UK and Heat Magazine.



“

YouTube has opened up a number of avenues for me that I never thought possible. Getting Ryan Gosling and Rege-Jean Page on the red carpet of The Gray Man to audio-describe their outfits to me was amazing! This really helped me to further my mission to help people to understand blindness.

— Lucy Edwards

A Place to Learn

YouTube empowers people of all ages to develop their personal and professional skills and deepen their knowledge. British users turn to the platform for a host of reasons—to learn new hobbies, solve practical problems, and access a wealth of educational content for students, educators, and parents alike.

Parents and teachers recognise the educational benefits of YouTube—in the classroom and beyond. Many adult learners also see YouTube as a useful resource for building on their formal education, gaining new skills to help them further their career.

YouTube is also a way to keep informed of current affairs and the issues of the day, whether that be searching for health information during the Covid-19 pandemic or learning about environmental sustainability.



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During lockdown I discovered some YouTube channels that positively helped my mental well being. It helped me to learn new skills hence taking my mind off the pandemic.

— User aged 75+, West Midlands



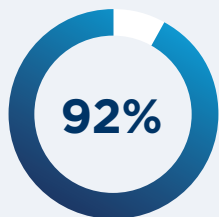
I and my children would be lost without the positive effect that YouTube has had on their education, from academic tutorials on any number of subjects to history and current affairs. We value it immensely.

— User, 45-54 years old, East of England



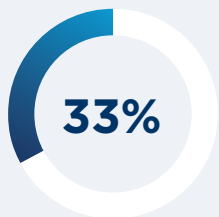
My youngest is autistic and YouTube helps her engage with her interests. It helped a lot with home learning during the pandemic.

— User, 35-44 years old, West Midlands



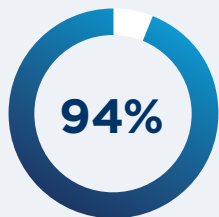
A Source of Knowledge

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



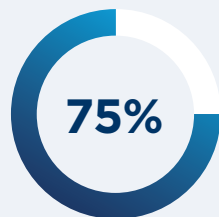
Furthering Careers

33% of users currently working use YouTube to help them develop skills to further their career.



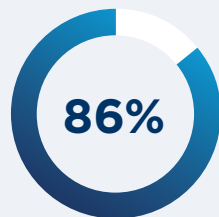
Practical Solutions

94% of users report they learn how to fix practical problems on YouTube.



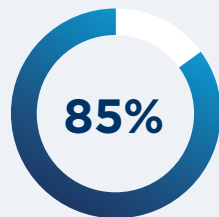
A Tool for Students

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



Helping Children Learn

86% of parents who use YouTube agree that YouTube (or YouTube Kids for children under 13) helps their children learn.



Making Education Fun

85% of parents who use YouTube (or YouTube Kids for children under 13) agree that YouTube makes learning more fun for their children.

/ **Freesciencelessons**

The Freesciencelessons channel was set up by passionate teacher Shaun in 2013, when he decided to provide his students with resources for independent learning. While there are many educational channels, Freesciencelessons sets itself apart by providing short, sharp, and informative videos with Shaun in front of the camera speaking directly to students. The videos already cover all topics in the GCSE science curriculum and Shaun is now aiming to expand this to cover the A-Level curriculum as well. Shaun's channel is driven by one core belief: that every student deserves outstanding teaching, no matter where they live, where they go to school, or how much money they have.

Since launching, Freesciencelessons has grown rapidly, gaining more than 600,000 subscribers and leading Shaun to leave teaching to become a full-time content creator three years ago. During Covid-19 Shaun ran free weekly Zoom sessions for teachers, who benefited from the opportunity to discuss the issues around teaching science with both Shaun and other colleagues. He also provided free training sessions via Zoom for schools that felt they would benefit from his support. He has had an impact on students across the UK and abroad, with parents, school children, and teachers alike thanking him for his helpful videos.

Thanks to YouTube, Shaun has been able to launch his own business, publishing a series of educational books to complement his videos. At heart though, Shaun is happy to be able to continue helping students for free through YouTube, earning a living while doing what he loves.





YouTube helps me help people that really need it. My channel has given me a project that has real meaning to lots of people, while also helping me make a living outside of traditional teaching.

— Shaun, Freesciencelessons

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By the Numbers

Economic Contribution

YouTube's creative ecosystem contributed more than **£1.4 billion** to the UK's GDP in 2021.

YT's creative ecosystem supported more than **40,000** full time equivalent (FTE) jobs in the UK.

The Home of Creative Entrepreneurs

80% of creative entrepreneurs agree that YouTube provides an opportunity to create content and earn money that they wouldn't get from traditional media.

87% of creative entrepreneurs agree that YouTube helps them export their content to international audiences they wouldn't otherwise have access to.

78% of creative entrepreneurs agree that YouTube is an essential platform to earn a global presence.

68% of creative entrepreneurs agree that the revenue they receive from advertisements being placed on their YouTube content is an important source of income for them.

54% of creative entrepreneurs agree that on YouTube they have more control over how their content is distributed and monetized on the platform than if they were to create content on other platforms.

Helping Businesses Grow

75% of SMBs with a YouTube channel agree that YouTube played a role in helping them grow their customer base by reaching new audiences.

68% of SMBs with a YouTube channel agree that YouTube played a role in helping them grow their revenue.

65% of SMBs who advertise on YouTube agree that YouTube ads have helped them grow sales.

75% of SMBs who use YouTube agree that their use of YouTube during the Covid-19 pandemic has helped their organisation adapt.

66% of media and music companies with a YouTube channel agree that YouTube helps them reach new audiences across the world.

62% of media and music companies with a YouTube channel agree that YouTube helps grow their overall revenue.

58% of SMBs who use YouTube agree that YouTube is essential to their business growth.

Driving Cultural and Societal Impact

85% of female creators agree that YouTube helps them share their passions and ideas.

71% of creative entrepreneurs agree that they identify and feel like they have a place to belong on YouTube.

84% of creative entrepreneurs agree they want to use the influence they discovered on YouTube to make a positive impact on society.

58% of creators agree that YouTube gives underrepresented voices a platform.

59% of users agree that YouTube gives underrepresented voices a platform.

A Place to Learn

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

33% of users currently working use YouTube to help them develop skills to further their career.

94% of users report they learn how to fix practical problems on YouTube.

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

86% of parents who use YouTube agree that YouTube (or YouTube Kids for children under 13) helps their children learn.

85% of parents who use YouTube (or YouTube Kids for children under 13) agree that YouTube makes learning more fun for their children.

88% of users who searched for sustainability content on YouTube say they found helpful information.

78% of users agree that YouTube has been helpful during the Covid-19 pandemic by providing access to timely and/or authoritative information.

60% of users agree that YouTube has been a reliable source of information during the Covid-19 pandemic.

64% of users who searched for health content on YouTube agree that YouTube provides access to authoritative health information.

74% of users agree that YouTube provides equal opportunities for everyone to learn and grow.

Glossary

Business: The types of businesses included in the analysis vary according to the claim. Our business survey gathered insights from UK 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.

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

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.

Shorts: YouTube Shorts is a way to browse, watch, and create short-form videos (60 seconds or less) from a smartphone. Further details are available [here](#).

Small & Medium Business (SMB): A business with less than 250 employees.

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

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.

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 UK-based YouTube content creators and published information on music industry revenues.

Off-platform revenues for creative entrepreneurs were estimated from the survey of UK 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 UK economy—to estimate both the supply chain (indirect) and worker spending (induced) impacts. The model for the UK was drawn from Oxford Economics’ Global Impact Model, which is in turn based on OECD data.

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 creator, 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

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.

Headquartered in Oxford, England, with regional centers in New York, London, Frankfurt, and Singapore, Oxford Economics employs 450 staff, including 300 professional economists, industry experts, and business editors.

As a key adviser to corporate, financial, and government decision-makers and thought leaders, our client base comprises over 2,000 international organizations, including leading companies, financial institutions, government bodies, trade associations, top universities, consultancies, and think tanks.

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