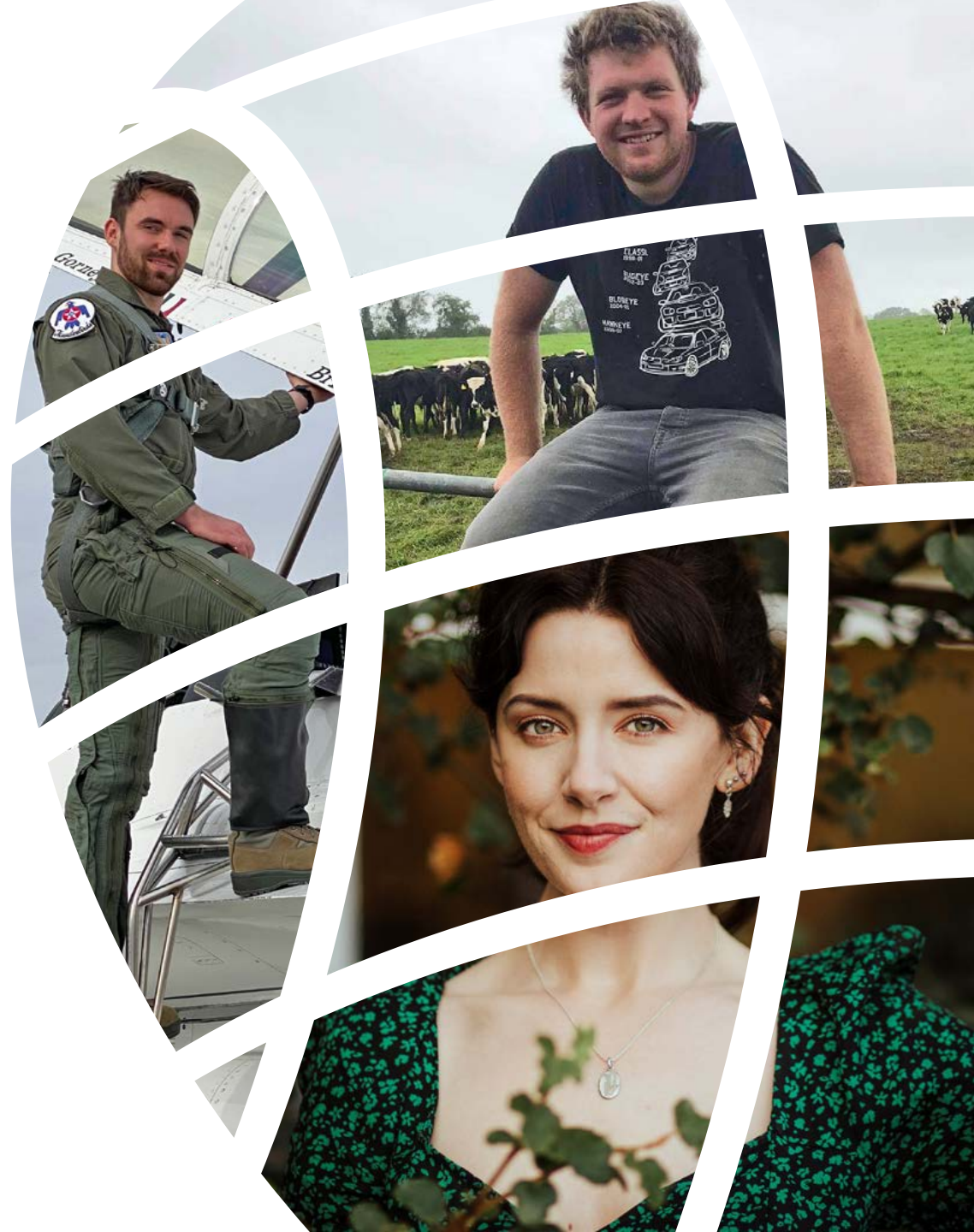


# FROM OPPORTUNITY TO IMPACT

ASSESSING THE ECONOMIC,  
SOCIETAL, AND CULTURAL  
BENEFITS OF YOUTUBE IN IRELAND



Every day, YouTube helps people learn new skills, start businesses, create jobs, and enrich their lives. This study by Oxford Economics assesses the full economic, societal, and cultural impacts of the world's most popular video-hosting website in Ireland, combining sophisticated survey techniques and economic modelling.

Around one billion hours of YouTube videos are watched every day across the world.<sup>1</sup> In Ireland, these views generate substantial revenues for YouTube creators and other businesses—which in turn support economic activity and jobs in their supply chains, and throughout the wider economy.

In 2020, we calculate that YouTube's creative ecosystem contributed approximately:



**€30 million**  
to Ireland's GDP



**1,600**  
FTE jobs across Ireland

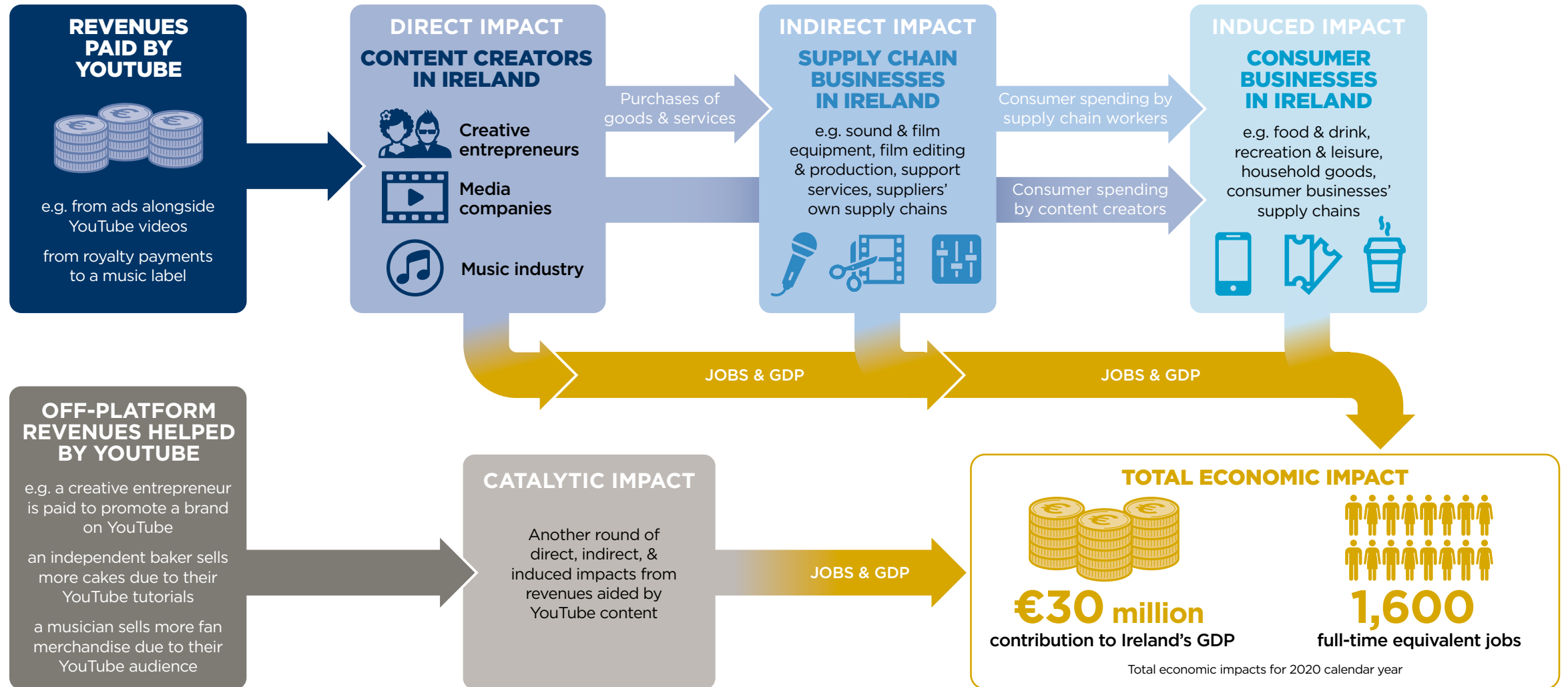
## OUR METHODOLOGY

Oxford Economics' economic modelling used survey results and published data to estimate the contribution of YouTube to headline economic metrics such as GDP and employment.

We undertook an anonymised survey of 2,000 Ireland-based YouTube users. We also surveyed more than 2,000 European businesses, and 780 creators in Northern Europe.

Over the following pages, we present the results of our economic modelling and other key findings from our research. We also present a series of personalised case studies of successful YouTube creators.

# THE TOTAL ECONOMIC IMPACT OF YOUTUBE'S CREATIVE ECOSYSTEM





## A PLACE TO LEARN

YouTube empowers people of all ages to develop their personal and professional skills and deepen their knowledge. Irish users turn to the platform every day to learn new hobbies, solve practical problems, and access a wealth of educational content.

**91%** of users reported that they use YouTube to gather information and knowledge.

**75%** of users with children aged under 13 (who use YouTube Kids in class or for homework/assignments) agreed that YouTube Kids makes learning more fun.

**68%** of users regularly watch “how to” and DIY videos on YouTube.

## / REAL ENGINEERING

Brian McManus always wanted to be a documentary filmmaker, but the career choice never seemed like an option for someone growing up in the west of Ireland in the 1990s. Having qualified as a design engineer, he quit his job in 2016 to pursue a career as a YouTube creator.

Five years later his two channels Real Engineering and Real Science—which he says give “interesting answers to simple questions”—have 3.1 million and 518,000 subscribers respectively. Within six months of starting his YouTube career, the income Brian earned from YouTube replaced what he earned as an engineer. Since then, he has hired four people full time as well as several freelancers who work as editors, animators, and writers.

Brian is also co-owner of a management company for informative creators called Standard, which launched a streaming service, Nebula, in partnership with the creators. It now has more than 400,000 subscribers.

His mission is to increase public access to high quality information on important issues such as climate change. It may have also helped raise the profile of engineering as a career: Brian says he has received messages from fans saying that they chose engineering as a vocation after watching the channel.







## AN AMPLIFIER OF A DIVERSITY OF IRISH VOICES

YouTube's accessibility offers opportunities for creators of all backgrounds by eliminating costs and circumventing traditional media processes. The diversity of this creator population is mirrored by YouTube's highly diverse content library, which connects users with culture of all kinds.

**74%** of users agreed that YouTube is home to diverse content.

**69%** of users agreed that YouTube allows them to view content they can't access through traditional media.

**68%** of users agreed that they feel YouTube has relevant content for them.

### / [FARMER PHIL](#)

Philip Stewart started posting videos on his YouTube channel Farmer Phil in 2015 to showcase the reality of day-to-day farming at his family's farm in County Longford, Ireland.

The channel now has almost 50,000 subscribers and Philip says that without the audience and consumer base it generated, he would not have been able to achieve his goal of launching a farm shop to generate extra income. His videos have been viewed almost 17 million times and people come from all over the country to visit the farm and the shop as a result.

The revenue from the channel also enabled him to invest in the farm and contracting business through the purchase of new machinery.

He has used the channel to deliver educational benefits with videos to educate people disconnected from farming about agricultural practices. He has also delivered classroom talks to children about farm safety.

During the restrictions imposed to contain the outbreak of the Covid-19 pandemic, Philip received messages from people saying how much they enjoyed the videos over lockdown. *"It is amazing the amount of messages and letters that I get from kids, parents, and grandparents on how my videos bring them together and to see the younger generation get a passion for farming."*





# THE HOME OF CREATIVE ENTREPRENEURS

YouTube provides a vehicle for Irish creators to find opportunities and economic success by sharing content with audiences, both locally and internationally.

**over 450** channels have more than **100,000** subscribers, an increase of over **20%**, year over year.

**over 70** channels have more than **1 million** subscribers, an increase of over **20%**, year over year.

**over 95%** of watch time on content produced by channels in Ireland comes from outside of Ireland.

Source: YouTube internal data, 2021

## / [MELANIE MURPHY](#)

Successful author Melanie Murphy believes she would not have had the opportunity to publish two books before the age of 30 without her YouTube audience. She launched her channel eight years ago while she was completing her degree at Dublin City University. Since then Melanie has written a memoir and a novel, which she says both became Irish best sellers thanks to support from her YouTube audience.

Her eponymous channel has 633,000 subscribers and her videos on health, culture, and motherhood have been viewed more than 71 million times. She has earned a full-time income for the past seven years from her YouTube presence. Melanie earns advertising revenue directly from her YouTube channel, but YouTube also helps her to earn income from other sources such as brand sponsorships, book deals, and public speaking gigs.

Although Melanie describes herself as a “one woman band” with no employees, she has hired camera crews for more complex projects such as a mini-documentary she made.

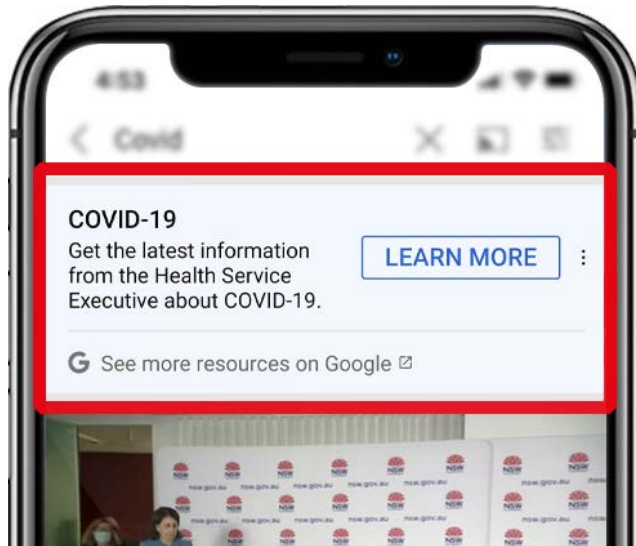
Melanie believes her channel has helped export Irish culture to the rest of the world. Some subscribers have even watched her videos to help them to learn about the country before moving to Ireland.



# SUPPORTING IRELAND DURING COVID-19

## AUTHORITATIVE INFO

**More than half** of users agreed that YouTube has been a reliable source of information since the start of the Covid-19 pandemic.



Covid-19 info panels that appear in Covid-19-related search results and watch pages, providing links to HSE Ireland web pages with general Covid-19 guidance and vaccine information.



Covid-19 news shelf appears on the YouTube homepage to make it easy for users to get up-to-date and authoritative news on Covid-19.

## HELPFULNESS

**74%** of users agreed that YouTube has been helpful since the start of the Covid-19 pandemic.

**60%** of parents who use YouTube agreed that YouTube has been helpful for their kids since the start of the Covid-19 pandemic.

*“Saved me a lot of money that I would have spent on the gym and cookbooks pre Covid-19.”*

User, 45-54 years old, Dublin, Ireland

# WHAT USERS AND CREATORS TOLD US ABOUT YOUTUBE

## A TOOL FOR LEARNING

*“My children were able to learn about different types of animals, places and cultures during the Covid lockdown. They find these subjects very interesting.”*

User, 35-44 years old, Wicklow, Ireland

*“As an ESL teacher I have found a lot of valuable useful content to show my students.”*

User, 35-44 years old, Dublin, Ireland

*“YouTube has helped students understand complicated topics with practical demonstrations.”*

Secondary school teacher, Dublin, Ireland

## CREATING NEW CAREER PATHS

*“I have managed to start a side hustle due to the knowledge I have found on YouTube.”*

User, 45-54 years old, South-East, Ireland

*“YouTube is brilliant for everyone to share content about themselves and provides potential for people to pursue a media career without needing to go through the traditional obstacle laden route.”*

User, 35-44 years old, Mid-East, Ireland

*“It enabled me to set up a new craft business and pursue my interests and hobbies.”*

User, 25-34 years old, South-East, Ireland

## SUPPORT FOR BUSINESS

*“It is the way of the future in growing business.”*

Company owner in the IT and telecoms sector, Dublin, Ireland

*“Helps effectively disseminate information with our customers.”*

Head of Marketing in the financial services industry, West, Ireland

*“YouTube has given us an edge.”*

Head of digital marketing for a cybersecurity platform, Dublin, Ireland



## 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 400 full-time staff, including more than 250 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.



## 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 Northern European content creators and published information on music industry revenues.

Off-platform revenues for creative entrepreneurs were estimated from the survey of Northern European creators. Off-platform revenues for music and media businesses were estimated from business survey responses from EU businesses.

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 Irish economy—to estimate both the supply chain (indirect) and worker spending (induced) impacts. The model for Ireland 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 are based on information provided by YouTube.

