

# FROM OPPORTUNITY TO IMPACT

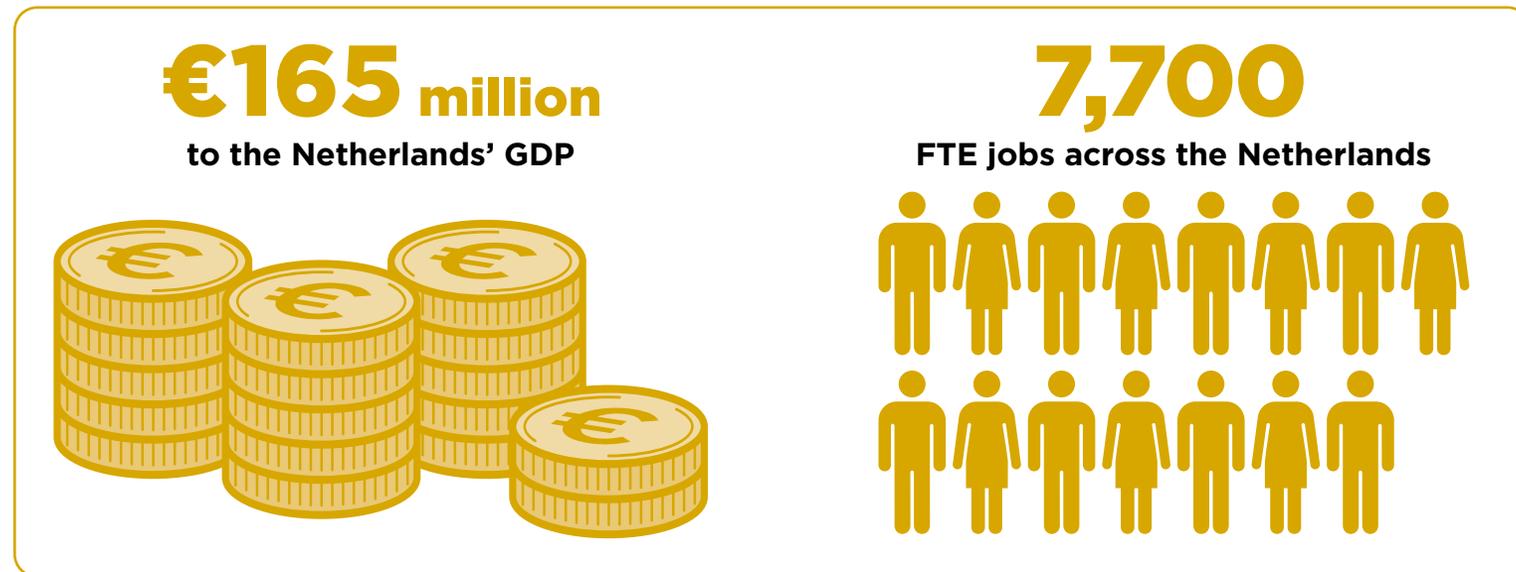
ASSESSING THE ECONOMIC, SOCIETAL,  
AND CULTURAL BENEFITS OF  
YOUTUBE IN THE NETHERLANDS



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 the Netherlands, 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 the Netherlands, 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:



## 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.

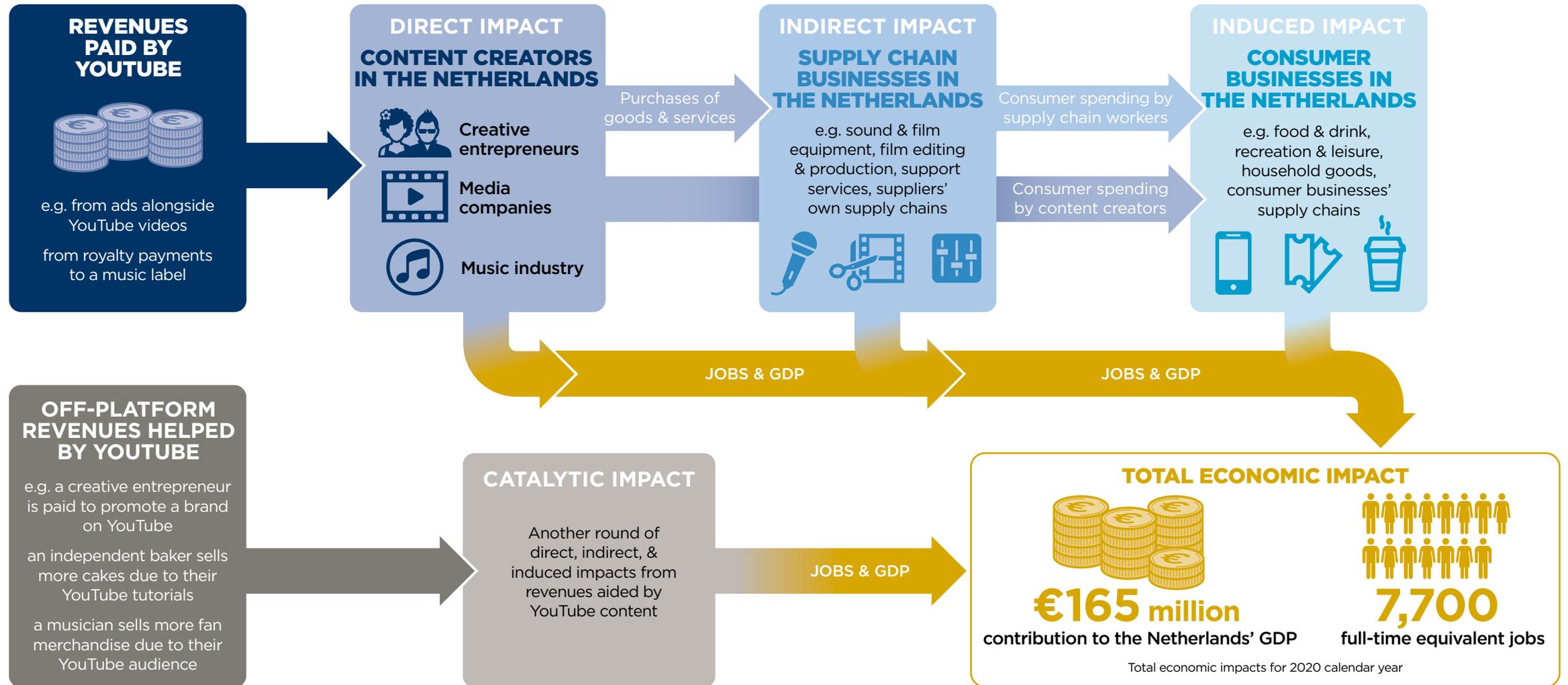
We undertook an anonymised survey of 2,000 YouTube users based in the Netherlands. We also surveyed 780 creators and 500 businesses across Northern Europe,<sup>2</sup> of which 236 creators and 69 businesses were in the Netherlands.

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.

1. Source: YouTube internal data, June 2021

2. YouTube defines *Northern Europe* to include Belgium, Denmark, Estonia, Finland, Ireland, Luxembourg, the Netherlands, and Sweden.

# THE TOTAL ECONOMIC IMPACT OF YOUTUBE'S CREATIVE ECOSYSTEM





## DRIVING CULTURAL DIVERSITY

YouTube makes it possible for anyone to be a creator. The diversity of this creator population is mirrored by YouTube's highly diverse content library, which connects users with culture of all kinds.

**72%** of users agreed that YouTube is home to diverse content.

**50%** of creators agreed that YouTube provides an opportunity to create content and earn money that they wouldn't get from traditional media.

### / **DUTCH NATIONALE OPERA & BALLET**

When The Netherlands went into lockdown in March 2020 to counter the spread of Covid-19, the managers of Dutch Nationale Opera & Ballet quickly realised that their YouTube channel was one of the best options they had to reach their audience.

The company had set up the channel in 2014 and had already decided to expand its online operations before the pandemic struck, but at the onset of lockdown it swiftly shifted its productions to create content specifically for online use.

The channel's content, reach, and subscriber numbers grew exponentially in the first 18 months of Covid-19, with subscriptions growing by more than 500% in that period. Now it has more than 87,000 subscribers and its videos of ballet and opera performances have been viewed some 12.2 million times.

YouTube has helped the company reach new audiences across the world with its content. Its online ballet classes, for example, have reached Dutch people who could not attend in person because of the lockdown, as well as fans living in other countries. It also helped the company reach people who could not attend live

classes for financial or other reasons. Professional dancers from all over the world, who were all forced to stay at home, also joined the classes.

Its YouTube channel has also enhanced the company's reputation globally. It has received messages of praise from singers and dancers from across the world. *"Multiple people have mentioned they would like to come to Amsterdam and visit us when the pandemic is over, and young artists have expressed their desire to audition for us,"* said a spokesperson for the theatre.





## A PLACE TO LEARN

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

**80%** of users reported that they use YouTube to gather information and knowledge.

**69%** of teachers who use YouTube stated they use content from YouTube in their lessons.

### / **DITGEBEURTERALS**

When health editor and writer Marije van der Made wanted to add a more personal tone to the pieces she was writing on issues such as public misconceptions over food and health, she decided to use YouTube as her platform. Describing herself as a very curious person, Marije decided to use her own body to carry out experiments to get her message across.

The challenges that she documented on her channel Ditgebeurterals (This happens when...) included living on only pizza for a week, walking barefoot everywhere for a week, and getting under the skin of someone with diabetes by checking her blood and injecting herself with saltwater daily for a week. After just five years she has 104,000 subscribers and her videos have been viewed almost 20 million times.

Thanks to the success of her YouTube channel, she has secured an advertising agreement, struck a book deal, launched the *Hands Off My Chocolate* snack that has sold in the Netherlands, Belgium, and Germany, and has secured long-term brand endorsement deals.





# AMPLIFYING AND EXPORTING DUTCH TALENT

YouTube's accessibility offers opportunities for Dutch creators of all backgrounds to find an audience for their videos, both locally and internationally.

**76%** of creators agreed that YouTube helps them export content to international audiences they wouldn't otherwise have access to.

**Over 80%** of watch time on content produced by channels in the Netherlands comes from outside of the Netherlands.<sup>3</sup>

3. Source: YouTube internal data, June 2022



While he was still a university student, Wouter van der Vaart decided to turn his hobby of making films into a business by sharing the videos he made on YouTube.

Nine years later he has three YouTube channels which between them have more than 900,000 subscribers and whose videos have been viewed over 310 million times: Dodo (a Minecraft channel), Dodo2 that covers online gaming, and a lifestyle channel called Wouter.

The success of these channels has opened the way for him to strike brand deals and to set up cinema tours of his content, a merchandising business, and a game developing company. He employs 15 people to work on his channels and businesses, including, among others, project managers, developers, video editors, and a merchandise operations manager.

During the Covid-19 lockdowns, Wouter received many messages from subscribers telling him that his videos had helped them take their mind off things when they were sad or lonely. *"We always try to be cheerful and fun in our videos, giving our viewers an escape from reality if they need it,"* he says.



# INSIGHTS FROM THE YOUTUBE COMMUNITY

## A PLACE TO LEARN

*“YouTube helps everyone to learn something new.”*

User, 25-34 years old, Leiden

*“I am very happy because I learned more about society.”*

User, 35-44 years old, Leeuwarden

*“YouTube helps you relax, learn, and acquire knowledge at all possible levels.”*

User, 25-34 years old, Leeuwarden

## A COMMUNITY OF USERS

*“It makes my life more enjoyable.”*

User, 35-44 years old, Tilburg

*“[A] source of knowledge and entertainment!”*

User, 65-74 years old, Rotterdam

## SUPPORTING CHARITIES AND SMES

*“Our presence on YouTube is as vital as the air we breathe. YouTube enables us to grow by leaps and bounds in terms of the message we are trying to deliver. Via our YouTube channel, we can connect to communities, governments, and wider society.”*

Senior Project Manager at an environmental charity

*“YouTube can take us to places we cannot otherwise reach.”*

Content creator for an SME in the electric vehicle industry

# 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 Dutch economy—to estimate both the supply chain (indirect) and worker spending (induced) impacts. The model for the Netherlands 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.

