FROM OPPORTUNITY TO IMPACT

ASSESSING THE ECONOMIC, SOCIETAL AND CULTURAL BENEFITS OF YOUTUBE IN BRAZIL
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 Brazil, combining sophisticated survey techniques and economic modeling.

Around one billion hours of YouTube videos are watched every day across world. In Brazil, 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:

- **122,000** full-time equivalent jobs across Brazil
- **R$ 3.4 billion** contribution to Brazil’s GDP

1. Source: Google data for 2020

**OUR METHODOLOGY**

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

In all, we undertook three anonymised surveys comprising 3,900 Brazil-based users, 900 creators, and 500 businesses. Over the following pages, we present the results of our economic modeling and other key findings from our research. We also present a series of personalized case studies of successful YouTube creators.
**THE TOTAL ECONOMIC IMPACT OF YOUTUBE’S CREATIVE ECOSYSTEM**

**DIRECT IMPACT**

**BRAZILIAN CONTENT CREATORS**

- Creative entrepreneurs
- Media companies
- Music industry

Purchases of goods & services

**INDIRECT IMPACT**

**BRAZILIAN SUPPLY CHAIN BUSINESSES**

- e.g. sound & film equipment, film editing & production, support services, suppliers’ own supply chains

- Consumer spending by supply chain workers

**INDUCED IMPACT**

**BRAZILIAN CONSUMER BUSINESSES**

- e.g. food & drink, recreation & leisure, household goods, consumer businesses’ supply chains

- Consumer spending by content creators

**CATALYTIC IMPACT**

Another round of direct, indirect, & induced impacts from revenues aided by YouTube content

**TOTAL ECONOMIC IMPACT**

- **R$ 3.4 billion** contribution to Brazil’s GDP
- **122,000** full-time equivalent jobs

Total economic impact for 2020 calendar year

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**REVENUES PAID BY YOUTUBE**

- e.g. from ads alongside YouTube videos
- from royalty payments to a music label

**OFF-PLATFORM REVENUES HELPED BY YOUTUBE**

- e.g. a creative entrepreneur is paid to promote a brand on YouTube
- an independent baker sells more cakes due to their YouTube tutorials
- a musician sells more fan merchandise due to their YouTube audience

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

**Note:** Results 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.
THE HOME OF CREATIVE ENTREPRENEURS

YouTube’s “creative entrepreneurs” find opportunities and economic success in Brazil both on and off the platform. Creative entrepreneurs can share their skills, express their creativity, and, in turn, build local businesses that contribute to the economy. YouTube’s media influence then enables Brazil’s creators to reach more people at home and overseas, providing a solid base for creators to thrive and grow.

88% of creative entrepreneurs reported YouTube has had a positive impact on their professional goals. 77% of creators agreed that YouTube provides an opportunity to create content and earn money that they wouldn’t get from traditional media. 68% of creative entrepreneurs agreed that YouTube had brought them additional opportunities away from the platform.

"What really matters on YouTube is to do what you like. Money is a consequence of that. Also, there’s no sense in creating a character, I am what you see on video!"

Canal Oficina Caipira, Eliseu Pereira, Divisópolis (MG)

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The woodworking shop that makes a hit without selling furniture

Becoming a Youtuber was not part of Eliseu Pereira’s plans, but when the opportunity came up, the bricklayer grabbed it by the horns. Son and grandson of wood craftsmen, Eliseu learned the job very early—during his childhood, as money was short, he used to make wood toy cars to exchange for marbles with his friends. In 2016 his dream came true when he opened a small woodworking shop in the back of his house, in Divinópolis (MG). His idea was to make some extra cash.

His first project was to design the worktop for his own shop. Supported by a friend, Eliseu filmed the whole process with his cell phone and posted it on YouTube. The rest is history: “I have become a craftsman and a YouTuber at the same time”, he says, amusingly, with his 800,000 subscribers to his Oficina Caipira channel, which has doubled in size during the pandemic. The boom in the number of followers and the increase in views—some videos reaching more than 4 million hits—caused Eliseu to be exclusively sponsored by a large equipment company and to partner with another company that supplies materials such as glue, varnish and sealers. “What really matters on YouTube is to do what you like. Money is a consequence of that. Also, there’s no sense in creating a character, I am what you see on video!”

Eliseu is a craftsman that no longer needs to sell his work. However, he is proud to be able to make a living from his former hobby: “Thanks to Oficina Caipira, I was able to buy a new car, improve my house and help my simple, hard-working family.”
A PLACE TO LEARN

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

100% of students who use YouTube (all aged 18+) reported using YouTube to support their assignments or personal study.

99% of users in Brazil reported that they use YouTube to gather information and knowledge.

92% of Brazilian teachers who use YouTube stated they use content from YouTube in their lessons.

77% of Brazilian teachers who use YouTube agreed that YouTube helps students learn.

“The need to keep all students attending classes during the pandemic made us set everything up in 20 days.”

Canal Centro de Mídias SP, Bruna Waitman, São Paulo, SP
Imagine if school was also on YouTube

Remote teaching has moved teachers in the State of São Paulo to a channel on the platform, opening a door that may never be closed again. Creating a media center that could provide support to in-class courses as well as additional online content had been part of São Paulo State Department of Education’s plans for years. However, the challenge of catering for more than 3.3 million students and 200,000 teachers meant that the idea was still on the drawing board. That changed on 13 March 2020, when the coronavirus outbreak forced all schools to shut.

“The need to keep all students attending classes during the pandemic made us set everything up in 20 days”, says Bruna Waiman, coordinator of the Center for Media Education of the State of São Paulo. She built a YouTube channel with more than 690,000 subscribers, two channels on open tv, and an app with content such as daycare facilities for young and adult students, high school students, and college applicants. “We offer 23 hours of live content every day. Picture the challenge” - says Bruna.

She says that technology will enhance face-to-face teaching rather than replace it. Looking ahead, the plan is to use YouTube channels to increase the number of elective subjects in school. With virtual elective classes, students will be able to choose courses not only available at their schools but also throughout the state. “This shall bring equity in education. Students who cannot study full-time will be able to complete their courses online”, adds Bruna.
DRIVING CULTURAL DIVERSITY

YouTube’s accessibility offers opportunities for creators of all demographics from across Brazil by eliminating costs and circumventing traditional media processes. The diversity of this creator population is reflected in YouTube’s highly diverse content, which connects users of all backgrounds with culture of all kinds.

90% of music, media and entertainment companies with a YouTube channel agreed that YouTube plays a positive role in encouraging diversity among creators.

75% of creators agreed that YouTube’s community encourages them to create “diverse and innovative” content.

78% of users agreed that YouTube allows them to view content they can’t access through traditional media.

94% of users agreed that YouTube is home to diverse content.

“By offering the possibility of monetization for those who fit into the criteria of the platform, YouTube offers us the possibility to pay for a nice production.”

Canal Dinah Moraes, Dinah Moraes, Fortaleza (CE)
Dinah uses YouTube to throw a spotlight on her native Ceará

The inspiration for Dinah Moraes’ channel is similar to that of many YouTubers: it all started by chance. "I was trying to change a faucet and left the tap on. Of course water splashed everywhere and I ended up soaking wet. Total tragedy posted on social media. I went to bed anonymously and woke up famous", she remembers. It was then she was struck by her talent as a communicator and comedienne and decided to dive deeper into it. When she started her career on the internet, Dinah could never grasp it could be a profession. However, finding out about the possibility to generate revenue from monetizing her videos, she decided to focus on YouTube. The channel went live in 2013 and, since then, it has been innovating in language and improving productions. Almost a decade later, the Dinah Moraes channel has more than five million followers and it is about to reach two billion views.

The northeastern state of Ceará is her main source of inspiration. One of the channel’s greatest hits is the series ‘The Walking Agreste’, a parody of the American series ‘The Walking Dead’, now in its fourth season. “It is a zombie series set in Ceará. The budget gets bigger each season: I spent R$5,000 in the first and R$70,000 in the last one. By offering the opportunity of monetization for those who fit into the criteria of the platform, YouTube offers us the possibility to pay for a nice production”, says Dinah.
HELPING BUSINESSES GROW

YouTube has become a valuable tool for Brazil’s businesses. It serves as a marketing platform to help attract customers to products and an advertising space to connect businesses to new audiences. This bolsters revenues, supports jobs, and improves productivity.

85% of businesses with a YouTube channel agreed that YouTube has played a role in helping them to grow their customer base.

87% of businesses with a YouTube channel agreed that YouTube helps them to better understand their customers.

92% of SMBs with a YouTube channel agreed that being on YouTube helps customers find their business.

85% of SMBs who advertise on YouTube agreed that YouTube ads have helped them grow sales.

“It was our son, an internet addict, who first gave me the idea of a YouTube channel. Our first video was a recipe for a cake. He also suggested the name ‘Padaria Sem Segredos’ for our channel.”

Canal Padaria Sem Segredos, Paulo Junio Dourado, Chapadão do Céu (GO)
A chef and his recipe for internet success

Paulo Junio Dourado saw his career take off after the creation of his Padaria Sem Segredos channel. You need to be patient to make good bread. And so it was with chef Paulo’s journey to success: after 20 years of experience in the bakery and pastry business, his YouTube channel was the missing ingredient.

That changed in 2019—thanks to his son Paulo Vitor, who was eight years old at the time. “It was him, an internet addict, who first gave me the idea of a YouTube channel. Our first video was a recipe for a cake. He also suggested the name ‘Padaria Sem Segredos’ for our channel”, he remembers. Gradually, Paulo started to see the number of subscribers increase. “The channel was growing, we were very close to monetization, but we still needed a blockbuster recipe”, he says. That came in form of, chef Paulo’s best recipe: his famous homemade bread.

Padaria Sem Segredos has already reached 716,000 subscribers and more than 16 million views. He teaches baking techniques and offers recipes to anyone who wants to make a living out of baking. YouTube has also provided Paulo with the opportunity to teach face-to-face classes and training courses, and has put Chapadão do Céu in the countryside of the state of Goiás on the baking map.
SUPPORTING BRAZILIANS DURING COVID-19

**AUTHORITATIVE INFO**

92% of Brazilian users agreed that YouTube has been helpful since the start of the COVID-19 pandemic.

To date, YouTube’s COVID-19 information panels have been viewed 400 billion times globally.²

**WELLBEING**

85% of users in Brazil agreed that YouTube has had a positive impact on their mental health or physical wellbeing since the start of the COVID-19 pandemic.

“‘It helps me every day in all areas of my life. For knowledge, especially now in the pandemic that we have to reinvent, and in daily entertainment with fun and new videos.’”

YouTube User, 18-24 y/o, Nordeste

**SMBs**

84% of SMBs who use YouTube agreed that YouTube has helped them sustain their business during COVID-19.

“YouTube has been a powerful ally of working from home.”

Company owner, Music, media and entertainment, Centro-Oeste


COVID-19 news shelf appears on the YouTube homepage to make it easy for users to get fresh and authoritative news on COVID-19.

COVID-19 news shelf appears on the YouTube homepage to make it easy for users to get fresh and authoritative news on COVID-19.

YouTube User, 55-64 y/o, Sudeste

2. Source: YouTube Data, 2020
WHAT USERS, CREATORS, AND BUSINESSES TOLD US ABOUT YOUTUBE

INFORMATION AND LEARNING STAND OUT AS BENEFITS OF YOUTUBE FOR BRAZILIAN USERS

“YouTube has become practically a manual of life for me. All my everyday questions I search on YouTube. I do not know what the world would be today without YouTube.”

YouTube User, 25-34 y/o, Sudeste

“Great tool for learning. You find lots of relevant content from various markets.”

YouTube User, 35-44 y/o, Norte

“YouTube is an incredible tool for work, entertainment, and studies, where it expands our knowledge.”

YouTube User, 45-54 y/o, Sudeste

YOUTUBE HAS PROVIDED FINANCIAL STABILITY FOR BRAZILIAN CREATORS

“It is the best thing that happened in my life! YouTube, thank you for being such a serious company that distributes chances to change people’s lives for the better, infinitely better!”

Creator, 25-34 y/o, Sudeste, 2.6 million to 5 million subs

“YouTube has given me a new lease of life, I was unemployed for more than three years and monetization was my salvation!”

Creator, 18-24, Centro-oeste, 50,000 to 250,000 subs

“YouTube completely changed my financial life. I got my financial independence!”

Creator, 35-44, Sudeste, 500,000 to 1 million subs

BRAZILIAN BUSINESSES FROM A RANGE OF INDUSTRIES BENEFIT THROUGH USING YOUTUBE

“YouTube is always innovating to better serve and we are always on the lookout for new updates and guidelines to get out in front.”

Head of Marketing or director-level report, Healthcare, Sul

“Certainly a tool of communication that will further help troubleshoot problems away. It’s been practical and reliable for many years.”

Head of External Communications or director-level report, Administrative and support activities, Nordeste

“YouTube assists in the growth of the company, in the customer base and employee training.”

Head of Internal Communications or director-level report, Agriculture, forestry and fishing, Centro-oeste
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 Brazil-based YouTube content creators and published information on music industry revenues.

Off-platform revenues for creative entrepreneurs were estimated from the survey of Brazilian creators. We did not have sufficient responses from Brazilian music and media businesses to robustly estimate their off-platform revenues, so we used benchmark information from business surveys in the US, UK, and Australia.

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 Brazilian economy—to estimate both the supply chain (indirect) and worker spending (induced) impacts. The model for Brazil 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 the survey responses relating to the weekly hours spent working on YouTube. We only included responses from creative entrepreneurs who spend at least eight hours per week working on YouTube. Jobs supported amongst creative entrepreneurs’ permanent employees were also estimated from the survey responses.

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

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