

# FROM OPPORTUNITY TO IMPACT

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



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 Poland, 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 Poland, 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:



**€98 million**  
to Poland's GDP

## 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.

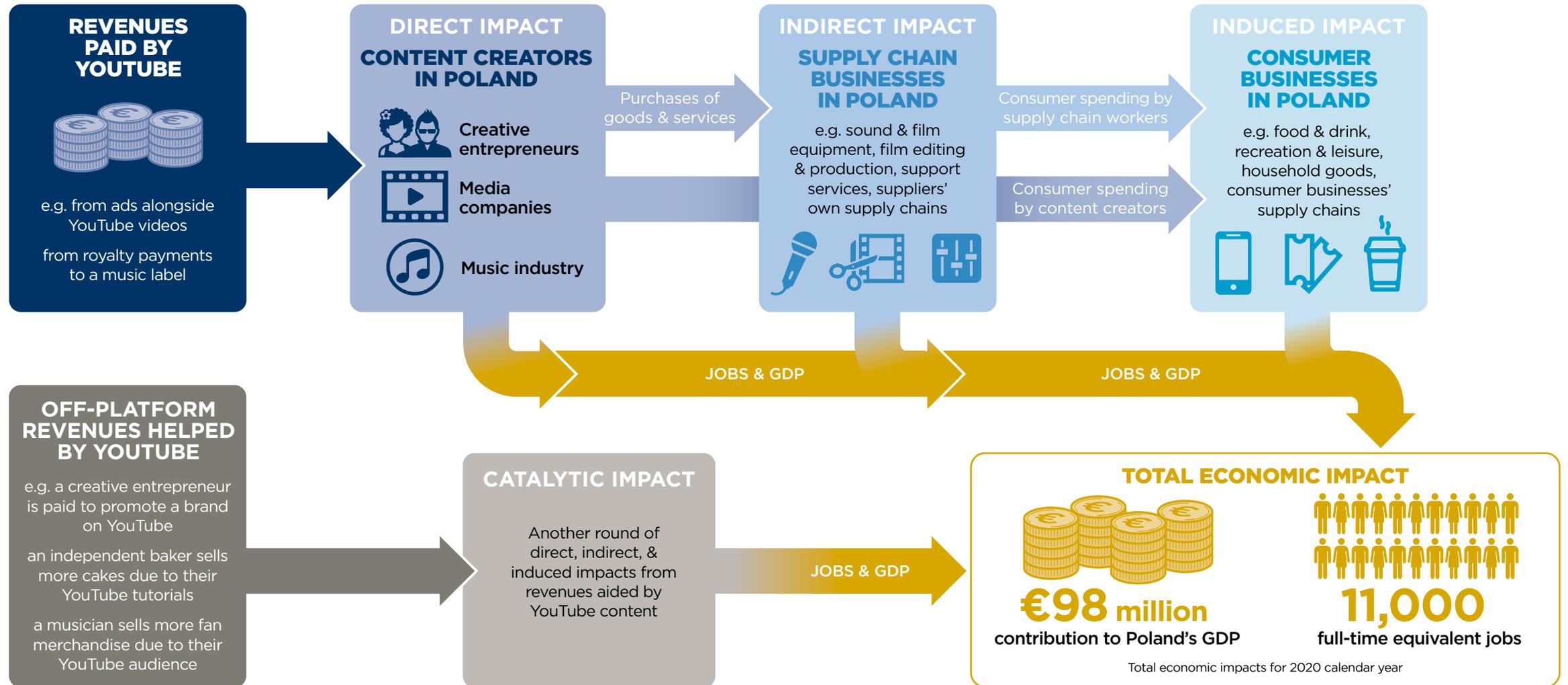
We undertook an anonymised survey of 2,000 Poland-based users. We also surveyed more than 2,000 European businesses and more than 1,100 Central and Eastern European content creators (of which 550 were in Poland)

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.



**11,000**  
FTE jobs across Poland

# 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. Polish users turn to the platform every day to learn new hobbies, solve practical problems, and access a wealth of educational content.

**97%** of users reported that they use YouTube to gather information and knowledge.

**42%** of users who are actively seeking a new job use YouTube to help them develop new skills for the job market.

**76%** of users with children aged under 13 (who use YouTube Kids in class or for homework/assignments) agreed that YouTube Kids gives their child the flexibility to learn at their own pace.

**58%** of minority creators agreed that YouTube provides a platform to share life experiences and educate others.

“I think YouTube helps you to learn, grow, and seek new motivation.”

User, 25-34 years old, Slaskie

### / **KASIA GANDOR**

Biotechnologist Kasia Gandor wanted to find a way to explain complex scientific concepts to a mass audience in ways a written blog could not. So, she started making videos and launched a channel on YouTube to host them.

Four years later, she has some 250,000 subscribers and her videos have been viewed over 18 million times. She has started a company to produce the videos and employs two people, as well as sub-contracting specialists such as audio editors, subtitle creators, and graphic designers.

As well as communicating science to a wider audience, Kasia says her videos have raised the profile of female commentators and brought science to a Polish audience that would previously have only found English language programmes.

During the Covid-19 crisis, she made videos about issues such as virology and vaccines. She is still very actively involved in fighting misinformation. “I’m getting lots of messages from people who were unsure about getting vaccinated but after watching my videos, decided to get the jab,” she says. “*It makes me feel like the stuff I produce matters.*”





## ENRICHING AND EXPORTING CULTURE

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

**57%** of creators agreed that YouTube helps them export content to international audiences they would not otherwise have access to.

**46%** of creators agreed that access to an audience outside of Poland is essential for their channel to be sustainable.

**66%** of creators agreed that the YouTube community encourages them to create "diverse and innovative" content.

### / [CHOPIN INSTITUTE](#)

In 2012 the Fryderyk Chopin Institute joined YouTube with the aim of sharing the music of Chopin with a larger global audience. The 2015 International F. Chopin Piano Competition proved to be a pivotal point in this venture, as the first ever competition of such standing to be broadcast live online. Live streams from the 18th Chopin Competition, which took place this October, were viewed across the world. Music lovers followed the performances on the Chopin Institute's YouTube channel, and the largest audiences were in Japan, South Korea, Poland, and the United States. During the competition, users viewed the videos more than 40 million times and the channel gained 130,000 new subscribers.

The channel has proved immensely successful in its original objective: it has made Chopin's music and personal story available to a large and diverse audience.

One particularly valuable impact was the ability of the YouTube channel to reach a younger audience, aged between 16 and 24, which had previously been a group that had been hard to connect with. Making Chopin's music available to all at no charge is also a boon for disadvantaged people in rural areas who often struggle to gain access to high quality culture and education.

The channel proved its worth during the coronavirus pandemic, and particularly during lockdowns. According to the Institute, the ability to broadcast live concerts online both gave the performing artists an audience, and also gave the Institute a sense of purpose as the organiser of musical events.





# THE HOME OF CREATIVE ENTREPRENEURS

YouTube's "creative entrepreneurs" find opportunities and economic success in Poland both on and off the platform.

**55%** of creative entrepreneurs agreed that being on YouTube has brought them opportunities away from the platform.

**65%** of creative entrepreneurs agreed that on YouTube they have more control over their content rights than if they were to create content for traditional media.

*“Being able to post content on YouTube enabled me get an extra job related to filming.”*

Creator, 25-34, Warsaw

## / VIDEO BROTHERS

Lukasz Skalik had enjoyed success in transforming the television experience in Poland through innovative online video platforms. However, it started to become clear that embracing YouTube would be the best path to further growth.

In 2016 Lukasz launched Video Brothers as a “Multi-Channel Network”. Video Brothers provides advice and guidance to hundreds of creators and businesses, including film and TV studios, music labels, radio stations, and video-on-demand platforms to help them maximise income from YouTube, and from other sources, such as brand endorsement deals, merchandising, book deals and crowdfunding.

Video Brothers has grown rapidly and has more than 30 million subscribers across the 320 YouTube channels it manages. It has a turnover of approximately €2 million per year, employs 10 people, and regularly works with a further 30 subcontractors.

Lukasz highlights that a particular advantage of YouTube is its global reach, which means creators can build a larger and more internationalised audience than would be possible through traditional media. As well as increasing revenues, this is an effective means of exporting and promoting Polish culture to a global audience.

*Creative entrepreneurs* comprise 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.



# SUPPORTING POLES DURING COVID-19

## HELPFULNESS

**78%** of users agreed that YouTube has been helpful since the start of the Covid-19 pandemic.



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.

## SUPPORTING FAMILIES

**67%** of parents who use YouTube agreed that YouTube has been helpful for their kids since the start of the Covid-19 pandemic.

*“During the lockdown it helped me a lot in teaching, as it was easy for me to bring them all on the same page while giving classes, by watching video lessons together and discussing at the same time.”*

Primary teacher, Warsaw

# WHAT USERS, CREATORS, AND BUSINESSES TOLD US ABOUT YOUTUBE

## A TOOL FOR LEARNING

“It 100% improves students’ engagement. When they know they do not have to learn a specific thing from a specific book, and that they can explore more on YouTube, they genuinely want to gain more knowledge.”

Primary teacher, Warsaw

“I use [YouTube] when I have problems at work, or want to be abreast with current trends.”

User, 45-54 years old, Warminsko-Mazurskie

“[YouTube] expands horizons and shows things from different points of view.”

User, 64-74 years old, Wielkopolskie

## CREATING NEW CAREER PATHS

“YouTube is a fantastic alternative to part time work during your studies. I have funds for my needs, projects I am passionate about, and full control over time and workplace.”

Creator, 18-24 years old, Malopolskie

“I am mobilised to work, and can share my latest ideas for songs and music videos.”

Creator, 65-74 years old, Łódzkie

“I cannot imagine life without YouTube. Thanks to it I found a new job, I have a passion, and I make money.”

User, 25-34 years old, Swietokrzyskie

## SUPPORT FOR BUSINESS

“My company has become more recognisable thanks to YouTube.”

Head of Communications in the IT industry, Slaskie

“The biggest advantage [of YouTube] is the customer reach from across the continent.”

Head of Marketing in the music industry, Podkarpackie

“It helps our customers get acquainted with our products.”

Chief HR Officer in the IT sector, Warsaw

## 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 YouTube content creators in Central and Eastern Europe and published information on music industry revenues.

Off-platform revenues for creative entrepreneurs were estimated from the survey of creators. Off-platform revenues for music and media businesses 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 Polish economy—to estimate both the supply chain (indirect) and worker spending (induced) impacts. The model for Poland 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.

