



WATCHTIME CANADA

How YouTube Connects Creators & Consumers

Ryerson
University

Faculty of
Communication
& Design
Audience Lab

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FORWARD

The Faculty of Communication & Design (FCAD) at Ryerson University is Canada's preeminent educational facility with programs in media, creative industries, and fine art, many of which are considered the top in their field. Many of our graduates have become leaders in the creative and cultural economy in Canada and internationally.

FCAD has developed considerable strength in the range of scholarly research and creative activities (SRC) of importance to the creative and cultural sectors. We have partnerships with a growing range of cutting-edge firms, government agencies, universities, and other organizations both nationally and across the globe. FCAD's Audience Lab was established to bring social science and computational approaches to a research-based understanding of consumers and users of media, entertainment, and other creative products and services. Researchers and students associated with Audience Lab have recently completed or are currently working on research projects on human-robot interaction, segmentation of small business users, topic modeling of large document sets, detection of online communities, audience receptions of screen narratives, sentiment analysis, and diffusion and uptake of news stories.

We are very pleased that Google selected Audience Lab to carry out a research project on Canadian YouTube creators and audiences to better understand YouTube's

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place in the Canadian media ecosystem. The results of this far-reaching project demonstrate that YouTube offers a unique value proposition to Canadian creators and consumers, one that complements the existing media ecosystem while extending the reach of creators, opening a huge window on the world for Canadian audiences, and changing the ways that we think about - and experience - cultural citizenship.

As Watchtime Canada 2019 shows, it is an exciting time to be a player in the world of creative content, whether as a creator, an audience member, or both.

Charles Falzon, Dean
Faculty of Communication and Design (FCAD)
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MANDATE

Google commissioned Audience Lab at Ryerson University's Faculty of Communication and Design (FCAD) to examine the role of YouTube in Canada's media ecosystem with a report focusing on Canadian YouTube creators and consumers.

The study proved groundbreaking on two fronts:

- 1. Nationally:** YouTube has been available in Canada for fourteen years; however, this is the first study to examine how it contributes to the Canadian media ecosystem.
- 2. Globally:** There has been significant research on YouTube spanning its first fourteen years, but there is a "notable absence" of research that examines the role of YouTube within national media ecosystems.

AUTHORS

This report was produced by Audience Lab at Ryerson University's Faculty of Communication and Design (FCAD). It was commissioned by Google. The analysis and interpretation herein are those of the authors and should not be attributed to Ryerson University, YouTube, or Google.



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EXECUTIVE SUMMARY

The story of YouTube began on April 23, 2005, when a 19 second video was posted at the San Diego Zoo by co-founder, Jawed Karim, a Bangladeshi-German-American, briefly talking about the size of elephants' trunks. A year later, the site was attracting 100M views per day.² In November 2006, YouTube was purchased by Google for \$1.65B. In 2018, YouTube was valued at \$160B.³

YouTube is the world's largest online video sharing platform with an astounding growth rate of more than 500⁴ hours of uploaded video per minute. The platform attracts the second largest audience in the world (after its parent company, Google).⁵ YouTube has 2 billion monthly logged in users⁶ including 24 million Canadians.⁷ Further underscoring the platform's growth, the number of channels with at least 1 million subscribers has doubled in the last year.⁸

YouTube's range of content is sprawling and unimaginably diverse - from the planet's most popular music, to informative or inspiring how-to's on an expansive range of topics, to entertaining and extremely quirky videos, to serious news. In all of these categories there are views that number in the billions. As this report will demonstrate, Canadian creators are influential and visible in each category on the platform.

Just a few Canadian YouTube celebrities who have accumulated over a billion views, include music artists **Justin Bieber** and **Shawn Mendes**; **Lilly Singh**, a lifestyle and comedic sensation who recently signed on to be a late night host on NBC for her eponymously named show *A Little Late With Lilly Singh*; **Evan Fong (VanossGaming)**, a top video gaming channel and one of YouTube's top earners; **GigiGorgeous**, the platform's top transgender creator; **Lewis Hilsenteger (Unbox Therapy)**, the platform's top technology channel; and **Gregory Brown and Mitchell Moffit (AsapSCIENCE)**, a top learning channel. Some Canadian channels have become so successful they have become production studios, including **WatchMojo** and **Super Simple Songs**. Many more Canadian creators and their channels are profiled in these pages.

A combination of Google public data and our research data indicates there are 160,000⁹ Canadian YouTube creators. About 25% or approximately 40,000 channels are sufficiently successful to be in the Partner Program,¹⁰ meaning that they are eligible to earn revenue. As will be seen in the report, many in this new group of creative entrepreneurs are making YouTube their full-time occupation.

YouTube states that their mission¹¹ is to “give everyone a voice” and “show them the world,” a duality that directly asserts the co-dependency of YouTube creators and consumers on the platform. As such, YouTube creators and consumers comprise the heart of YouTube.¹²

The company cites “four central freedoms” that guide corporate decision-making: (1) an open platform dedicated to free expression; (2) free access to information; (3) to help creators succeed; and, (4) to help creators and fans find a sense of belonging.¹³

Our report focuses on examining these claims for the purpose of assessing the values that YouTube contributes to Canada’s national media ecosystem through the perspectives of Canadian YouTube creators and consumers.

The report contains two types of content: our original research findings and contextual information about YouTube collected from public sources. The contextual information about YouTube includes nearly 25 images, and is purposed to familiarize the reader with the platform on and behind the screen.

The bulk of the report presents, describes and analyzes our research findings. Our study is anchored by quantitative and qualitative data resulting from two surveys,¹⁴ of both YouTube creators and consumers, with more than 1,200 and 1,500 participants respectively. In addition to over 50 charts that represent the quantitative data, the research generated more than 9,000 qualitative comments. As presented in the report, this qualitative data helps bring the quantitative findings alive.

In this study, YouTube creators are defined as they are by YouTube, as anyone who uploads a video. This service is free but requires signing up for an account and providing an email address. The act of uploading a video, whether that video is set to private or public, automatically creates a channel, defined by YouTube as simply the homepage of an account. The channel displays information such as the date launched, “about” information, and number of views -- whether there are 2 views or 2 billion views, and whether the channel is monetized or not.

In this study, consumers are defined with multiple terms in consideration of the variety of ways that Canadians engage with YouTube to access content, as well as the multitude of reasons that they do so. Therefore, YouTube consumers are also referred to interchangeably as YouTube audiences, users and viewers.

THE REPORT IS ORGANIZED IN FOUR CHAPTERS

CHAPTER ONE

01

YOUTUBE: IT ALL STARTED AT THE ZOO

Chapter 1 introduces YouTube's global platform; provides an analysis of the YouTube value chain and observes the way it tightly links creators and consumers in a living lab of media value creation; and explores the important issue of preventing five types of harmful content and YouTube's strategic responses.

CHAPTER TWO

02

CANADIAN YOUTUBE CREATORS: EMBRACING LOCAL AND GLOBAL AUDIENCES

Chapter 2 presents and analyses the findings from our creator survey including diversity, creative entrepreneurship, employment, revenue, domestic audiences, global export, genre excellence, the emergence of a new focus on educating and inspiring audiences, building competencies, and pathways to and from legacy media.

CHAPTER THREE

03

CANADIAN YOUTUBE CONSUMERS: EMBRACING LOCAL AND GLOBAL CONTENT

Chapter 3 presents and analyses the results of our consumer survey including platform usage as a "MeTube," a unique hybrid medium; learning as the big story of usage; diversity that consumers see on YouTube; YouTube as a window on the world; and Canadian YouTube consumers' predictions of their future media use.

CHAPTER FOUR

04

YOUTUBE IN CANADA: UNIQUE VALUE PROPOSITIONS

The final chapter closes with an overview of 21 value propositions that emerged from our research; five meta insights, and one key takeaway, as follows:

TWENTY-ONE VALUE PROPOSITIONS

Twenty-one value propositions emerged from our research, each suggesting a way that YouTube contributes to the Canadian media ecosystem. Explorations of each one can be found in the chapter and sections listed.

1. **(1.1) BENEFITS AT NO COST TO THE SYSTEM:** While YouTube costs more than \$6B per year to maintain,¹⁵ the platform is free for creators and consumers, incurring no technological or administrative cost to Canada's media ecosystem.
2. **(1.2) UNIQUE VALUE CHAIN:** On YouTube, value creation results from the value chain dynamics, which tighten linkages between creators and consumers.
3. **(1.3) LIVING LAB:** YouTube might be considered a living lab in how content by Canadian creators performs in a global marketplace of open competition.
4. **(2.1) DIVERSITY:** YouTube creators are diverse across age, geography, primary language spoken, gender, ethnicity, and physical ability.
5. **(2.2) CREATIVE ENTREPRENEURS:** YouTube has facilitated the rise of a new group of 160,000¹⁶ Canadian creators, including 40,000 who have achieved sufficient audience traction to monetize their channels.
6. **(2.3) EMPLOYMENT:** Canadian YouTube entrepreneurs are creating employment for themselves and others: nearly 28,000 full-time equivalent (FTE) jobs,¹⁷ estimated very conservatively and not including labour on 120,000 channels that are not monetized.
7. **(2.4) REVENUE:** While the majority of eligible Canadian YouTube channels generate less than \$10,000 per year in all sources of gross revenue, 15% generate more than \$50,000 annually; 12% generate \$75,000 or more; 9% generate \$100,000 or more; and 6% report generating \$150,000 or more. A variety of revenue streams, including direct YouTube advertising monetization, brand deals, sponsorships, live appearances, and/or related media (such as book deals) appears to be the norm.
8. **(2.5) EXPORT:** YouTube is a free, instant global export instrument. This service is highly valued by Canadian creators, who lead the platform in their export record of 90% views from outside of Canada.
9. **(2.5) ACCESS TO GLOBAL MARKETS:** Canadian creators value the access YouTube provides to global audiences. If promotion of content to domestic audiences were to reduce visibility to international audiences, 61% of eligible Canadian creators believe their channels would be impacted negatively.
10. **(2.5) DOMESTIC AUDIENCE:** Canadian YouTube creators report that Canada is their #1 audience, followed by the U.S. and the U.K. France is also a valuable audience.

- 11. (2.6) EDUCATION IS A MAIN PURPOSE:** While Canadian creators excel in all YouTube genres, teaching and inspiring audiences is Canadian creators' third highest purpose, following their goals to (1) build audiences and (2) generate revenue.
- 12. (2.7) BUILDING COMPETENCIES:** YouTube offers an array of free services to strengthen the skills of creators in three arenas: production (YouTube Space); channel management and marketing (Creator Academy); and audience analytics (YouTube Studio). Canadian creative entrepreneurs value these services.
- 13. (2.8) PATHWAYS TO AND FROM LEGACY MEDIA:** The connections between YouTube and legacy media flow two ways. We found many examples of success on YouTube leading to success on legacy media platforms, and many examples of legacy media creators migrating to YouTube for its benefits.
- 14. (3.1) "EASY" AND "CHOICE" ARE THE NEW "KING" AND "QUEEN!"** More than three in four Canadians use YouTube, valuing it as a "MeTube" for its personal affordances of being free, always on, and its seemingly unlimited topics that are easy to search, thus rendering "easy" and "choice" the new "king and queen".
- 15. (3.2) A UNIQUE MEDIA FORMAT, NEITHER LEGACY NOR SOCIAL MEDIA:** More than half of Canadian YouTube audiences access the platform without an account. YouTube is positioned between legacy and social media, but is neither. YouTube is a unique hybrid medium without equivalent in the media ecosystem.
- 16. (3.3) DIVERSITY:** Canadian YouTube consumers value the diversity they see on YouTube, including genres, perspectives, voices, languages, geographies, genders and ethnicities that are not as visible on other media.
- 17. (3.4) COMPLEMENTARY TO LEGACY MEDIA:** YouTube is not the first place that Canadian YouTube users go for music, entertainment (including long-form narrative, sports, comedy), or news and information, suggesting YouTube is complementary to legacy media.
- 18. (3.5) YOUTUBE IS THE FIRST MEDIA SPACE WHERE CANADIANS GO TO LEARN:** 70% of Canadian YouTube consumers rank YouTube as the first place they go to learn things.
- 19. (3.6) ACCESS TO GLOBAL CONTENT:** 65% of Canadian YouTube consumers value YouTube as the best place to watch the same video as anyone else in the world.
- 20. (3.6) CANADIAN CONTENT:** 88% percent of Canadian YouTube users do not actively seek Canadian content on YouTube, with no significant differences across age or primary language spoken. A majority (65%) of Canadian YouTube consumers believe that no government or other organization should determine what they can watch on YouTube.
- 21. (3.7) MEDIA DISRUPTION:** Canadian YouTube users predict their YouTube use will increase in the next five years, while their use of legacy media platforms will decline, with the exception of talk radio.

FIVE META-INSIGHTS

In 5 meta insights, we observed that Canadian YouTube creators and consumers value many of the same YouTube features and services:

1. Canadian YouTube creators and consumers value that YouTube's services are **free** and **easy-to-use**.
2. Canadian YouTube creators and consumers value YouTube's reach, which is **borderless** and **global**, facilitating access to global audiences and global content.
3. For Canadian YouTube creators and consumers, YouTube is a unique media offering, with **no equivalent in the domestic media ecosystem**.
4. Canadian YouTube creators and Canadian YouTube audiences agree that one of YouTube's **key affordances is learning**.
5. The **theme of joy** was dominant in the qualitative responses from both surveys. Canadian creators and consumers appear to be having a great time on YouTube, whether building entrepreneurial businesses from personal passions or watching whatever and whenever they want.

ONE KEY TAKE-AWAY

For all of YouTube's vastness and complexity, our research suggests a simple logline: YouTube plays a unique and significant role in Canada's media ecosystem. The connection between creators and consumers goes two ways: one to global and global to one.

Since its launch fourteen years ago, YouTube, in addition to facilitating the rise of a new group of Canadian creative entrepreneurs who are inventing new forms of popular content, has resulted in significant outcomes with respect to diversity, employment, domestic popularity, global export, and global access. YouTube has achieved these results without requiring transfer of IP rights from creators (including copyright or distribution rights) and largely in the absence of public funding and its associated costs.¹⁸

The report closes on a "cosmic" note. In fifteen years, YouTube has travelled from the zoo to outer space, quite literally. On the final day of his final mission,¹⁹ Canada's most famous astronaut, Chris Hadfield, uploaded a cover of David Bowie's "Space Oddity" to YouTube. The video went viral. Hadfield's haunting, lyrical ode combines YouTube's most popular features: science learning, music remix and above all, the authentic personal perspective that is unique to YouTube.

JUSTIN BIEBER

19B VIEWS

44.8M SUBSCRIBERS

As of April 2019

Justin Drew Bieber, the global pop star from Stratford, Ontario, was famously discovered posting cover videos on YouTube. Bieber released his debut single, "My World" in 2009 when he was 14 and it went platinum. Bieber became the first artist to have seven songs from a debut record on the Billboard Hot 100. His hit "Sorry" was the top viewed video of all time (3.08B views) until surpassed in 2012 by Psy's "Gangnam Style." Bieber's numerous awards include two American Music Awards for Artist of the Year, a Grammy for Best Dance Recording, and a Latin Grammy. Bieber has been named three times by Forbes as one of the top ten most powerful celebrities in the world. In 2016, Bieber became the first artist to surpass 10 billion total video views on Vevo. His popularity continues in the present, with his "Despacito" remix (4.2B views), the second most viewed video of all time, after the original "Despacito." In 2018, Bieber married model Hailey Baldwin.²⁰

YOUTUBE

It All Started at the Zoo



YOUTUBE FOUNDERS

Three ex-PayPal employees Steve Chen, Chad Hurley, and Jawed Karim registered YouTube in February 2005. On April 25, 2005, Karim uploaded its first video, the nineteen second "Me at the Zoo." Eighteen months later, in November 2006, Google bought YouTube for US\$1.65 billion.

STEVE CHEN

Steve Chen is a U.S. citizen and immigrant from Taiwan who studied computer science at the University of Illinois. In 2018, Chen received the Order of Lincoln, the state of Illinois' highest honour.

CHAD HURLEY

Chad Hurley from Reading Pennsylvania, graduated from Indiana University of Pennsylvania. In August 2013, Hurley launched MixBit for video editing on smartphones, acquired by BlueJeans Network in 2018 and renamed Zeen.

JAWED KARIM

Jawed Karim was born in Merseberg, Germany to a German mother and Bengladeshi father; the family moved to Minnesota in 1992. Karim studied computer science at the University of Illinois at Urbana-Champaign. He interned at Silicon Graphics in Silicon Valley. He then worked at PayPal, where he met Chen and Hurley.



“Our mission is to give everyone a voice and show them the world.”

YOUTUBE CORPORATE STATEMENT OF PURPOSE²¹

1.1 THE YOUTUBE GLOBAL PLATFORM: INTRODUCTION

1.1.1: Origin and value of the platform

The story of YouTube began on April 23, 2005. Co-founder Jawed Karim, a then 26 year old, Bangladeshi-German-American and ex-PayPal employee, uploaded the first YouTube video. “Me at the Zoo” was a nineteen second long video of Karim observing the size of elephant trunks. Today, YouTube’s first video is easily discoverable on YouTube and has been viewed over 69 million times.

In November 2006, when the site was already receiving more than 65,000 uploads and 100 million views per day, YouTube was purchased by Google for \$1.65B.²² Alphabet, Google’s parent company (of which YouTube is a subsidiary) does not break out valuations of corporate assets; however, in 2018, investment bank Morgan Stanley valued YouTube at \$160B.

The annual cost of operating the YouTube platform has been estimated at \$6.35B²³ a cost that has not been passed on to Canadian consumers and/or creators. YouTube’s operating costs include hardware (for example, 15 data centres on three continents that keep the platform running 24/7)²⁴ and employees in jobs involving software design and maintenance, marketing, advertising sales, administration, and the development of an array of user-facing services for creators, consumers, and advertisers that are constantly evolving. The company is headquartered in San Bruno, California and has more than 2,000 employees²⁵ worldwide.

No individual creator could reproduce YouTube. In addition to the costs of the technological infrastructure, YouTube provides major network externalities in the form of billions of hours of video content and, on the demand side, two billion users.

1.1.2: Size and reach of the platform

Since 2005 the platform has grown exponentially (doubling in size every few years). It is considered the planet’s largest video repository. Estimates of its size have been up to 3 billion videos,²⁶ but what is more astonishing is its reported growth rate of 500 hours of content uploaded per minute.²⁷ The platform is online in 91 countries and 80 languages and is available in 95% of the places that have Internet.²⁸ The mobile app, YouTube Go, with the logline “for the Next Billion Users,” is available in 140 countries, though it is not available in Canada. YouTube reported that the Go app has been built specifically for emerging economies where Wifi is scarce.

1.1.3: Audiences

According to the [Alexa rankings](#), YouTube is the world's second most visited website after the Google search engine. Both are owned and operated by Google LLC.

Alphabet's latest earnings report²⁹ indicates that YouTube is available in 98% of the places in the world that have Internet and that nearly 80% percent of global Internet³⁰ audiences use YouTube, watching more than a billion hours of video per day. Eighty percent of all watch time comes from outside of the U.S.³¹ The platform has over 2 billion monthly logged-in users.³² Research suggests that another 50% may use the platform without logging in.³³ This percentage of non-registered viewers aligns with our Canadian research, as presented in Chapter 3.

Globally, the fastest growing age group in YouTube's audiences are 35-55.³⁴ The average viewing session on YouTube has been growing 50% year over year; the global average is now 40 minutes per session.³⁵

Globally, more than 70% of YouTube watch time now happens on mobile devices.³⁶ Our Canadian research indicates that Canadians access YouTube by a variety of devices, including, computers (laptop/desktop), smartphones, tablets, and TV's (including video game consoles). The most frequently used device to access YouTube for younger Canadians (18-34) is smartphones.

YouTube has undergone constant and dramatic transformation from its early days as a place for funny cat videos. It has since expanded unimaginably in its diversity of content. YouTube videos now range from educational and informational content, to mainstream music, to the outliers of quirky entertainment and a vast range of other topics. Via the platform's value chain structure and business model, numerous content niches are grown and transformed into monetized, viable audiences. Such transformations of both purpose and content continue. Our research appears to be one of the first studies to observe the newest emerging purpose on YouTube: its unique role as a learning destination.

Like many enterprises in the attention economy - not just media - YouTube is a hit-driven business that is

subject to a steep demand curve. A ten-year study found that the top performing 3% of channels uploaded 28% of the content and captured 85% of all views.³⁷

1.1.4: Business model

YouTube's business model is reminiscent of early television, a two-sided media market whereby the content platform is available for free to audiences, whose attention is sold to advertisers. However, unlike legacy media, YouTube does not acquire intellectual property (IP), including copyright to content uploaded on its platform. YouTube monetizes videos according to their popularity and suitability for advertising, as calculated by a complex set of algorithms, a platform feature which has not been without controversy.

YouTube splits advertising revenue with content creators, with 55% remitted to creators and 45% to YouTube.³⁸ Channels qualify for monetization under [YouTube's Partner Program](#) when they reach 1,000 subscribers and have more than 4,000 public watch hours in the previous 12 months. YouTube public data reports³⁹ that more than one million YouTube channels earn revenue through the Partner Program and there are 95% more YouTube channels with over 1M subscribers than in 2017. The number of creators earning six figures or more a year is up by 40% from 2017 and the number of creators earning five figures is also up by 40%.⁴⁰

YouTube advertising costs and revenue are integrated with its parent company, Google, and its parent company, Alphabet, which does not break out advertising revenue for subsidiaries. YouTube's global annual advertising revenue has been independently estimated at \$4B;⁴¹ however, it is unclear whether this figure is net of YouTube creator remittances. Such estimates of revenue, compared to the more than \$6B cost of operating the platform, align with YouTube CEO Susan Wojcicki's 2016 statement that YouTube was not yet profitable.⁴² Alphabet's 2018 *Annual Report* does not report profitability for YouTube, saying that \$18B in revenues were generated by "various Google properties, including Gmail, Google Maps, Google Play, and YouTube."⁴³

More than a decade to profitability may suggest a comparison between the digital advertising business model and legacy TV. In the 1950s, broadcasting quickly became profitable with its mass distribution technology enabling simultaneous monetization of one advertisement with tens of millions (or more) viewers.⁴⁴ In contrast, the digital advertising model necessitates monetization of audiences by “onesies and twosies,”⁴⁵ suggesting that a global content/digital advertising business may be a more challenging media business model than traditional broadcasting.

A ten year review of media advertising in Canada⁴⁶ shows overall growth of 16%, up from \$11.3B in 2008 to \$13.6B at the end of 2018. During this decade, broadcast TV advertising decreased by about 1.4% (from \$3.39B to \$3.20B). Internet advertising leaped from \$1.6B to \$6.8B, about a 50% share of all Canadian media advertising. However, decreases in traditional media advertising appear to have affected mainly text-based media, such as newspapers. Internet video advertising (\$12M to more than \$900M) and mobile advertising (\$7M to \$3.5B) leaped during this same decade, suggesting that YouTube advertising may be additive to the Canadian advertising ecosystem.⁴⁷

1.1.5: Platform features for Consumers

As well known to YouTube users, the interface provides many free features including search, channel subscription, ad skipping, viewing recommendations, sharing, liking or disliking a video, number of views per video, date of upload, commenting, creating a playlist, watching someone else’s playlist, connecting with creators, and closed captioning. As discussed in Chapter 3, our research suggests that Canadian users most value YouTube for its personal affordances of choice, ease of use, and especially for being free. Our research results also suggest that YouTube is regarded by audiences as a unique hybrid medium, positioned between legacy and social media, an offering without an equivalent in the national media ecosystem.

YouTube’s consumer features are in constant evolution. Here are some recent offerings:

YOUTUBE MUSIC AND MUSIC PREMIUM

Launched in Canada in 2018, these are YouTube’s music streaming services. Music Premium is the ad-free upgrade for \$9.99 CAD per month, that offers background listening while the user is on another app, and with the screen locked or offline -- features not available on the original YouTube.

YOUTUBE PREMIUM (FORMERLY YOUTUBE RED)

Launched in 2018, YouTube introduced this subscription, ad-free version of the platform in Canada. Content includes Canadian YouTube creators such as the 2016 Lilly Singh, *A Trip to Unicorn Island*, or Oscar-winning filmmaker Barbara Kopple’s 2017 film documenting the gender transition journey of Gigi Gorgeous, *This is Everything: Gigi Gorgeous*.

YOUTUBE TV

Launched in 2017, YouTube TV is a streaming service that rolls up about 60 legacy TV networks and makes them available on a separate app with unlimited cloud DVR. For about \$50 USD, YouTube TV includes major U.S. networks such as ABC, CBS, NBC, Fox, CNN, TBS, and ESPN. In early 2019, YouTube TV became available in 195 U.S. TV markets or 98% of U.S. TV households, but is not yet available in Canada.⁴⁸

1.1.6: Platform toolkits for creators

The YouTube platform offers an extensive array of free, built-in resources to support content production, channel building, and audience analytics. These services include YouTube Spaces (currently ten locations across the globe including YouTube Space Toronto), YouTube Studio, Creator Academy, YouTube Certified (an online course within YouTube’s Creator Academy), YouTube Analytics, YouTube Creator on the Rise, YouTube Creator Directory, FameBit by

YouTube, YouTube Spotlight, Merchandise Shelf, live-streaming, and SuperChat. The list of resources is often iterated and expanded. Our research demonstrates that Canadian creators highly value these services, as described on the following pages.

PLATFORM FEATURES SPECIFIC TO CANADA

YouTube has also launched channel initiatives specifically for Canada that are available globally and are free to consumers. As profiled, these initiatives include Encore+ (a partnership with Canada Media Fund), Spotlight Canada, and Creator on the Rise, as described below.

ENCORE+

YouTube partnered with Canada Media Fund (CMF) on Encore+, a YouTube channel launched in November 2017 that showcases classic Canadian content no longer aired on linear TV such as *The Littlest Hobo* and *Wayne & Shuster*. CMF has uploaded over 1000 videos to the channel, which has over 40,000 subscribers and 7.6 million views (as of April 2019). Over half of Encore+ watch time comes from outside of Canada, extending the reach of classic Canadian content to global audiences.⁴⁹ Encore+ also fulfills the critical purpose of digitizing and archiving TV programs as original master tapes degrade.

SPOTLIGHT CANADA

In July 2017, Canada became the first country to have its own YouTube Spotlight channel dedicated to showcasing Canada's top stars in French and English, as well as emerging Canadian content. The channel highlights the creators and videos most popular with Canadians, features themed playlists and news stories specific to Canada. Spotlight Canada has about 8,700 subscribers and 18,000 views (as of April 2019).

CREATOR ON THE RISE

Since August 2017, Canada is one of just a few countries (including U.S., France, Germany, Australia, Brazil, India, Japan, and Mexico) on YouTube to feature emerging creators, gaming creators, and music artists. *Creator on the Rise* is available on the Trending tab and it identifies Canadian creators who are growing rapidly in popularity and showcases their videos, helping them build even bigger audiences. Using gamification, creators are featured for 24 hours and their channel is awarded an Artist or Creator on the Rise badge. Canada's Creator on the Rise has been so successful that YouTube Canada now features three creators per week. Many creators featured have gone on to greater entrepreneurial and creative success, including Lilly Singh, Thomas Gauthier, GigiGorgeous, and Alessia Cara. Colombian-Canadian singer Jessie Reyez was featured as YouTube's first ever global artist on the rise.⁵⁰

YOUTUBE CREATOR SERVICES AT A GLANCE

YouTube Creator Academy is a no cost, online resource for YouTube creators that provides comprehensive and qualitative support, education and training. Self-guided lessons are tailored for content creators and provide an extensive range of information about the skills needed for developing, creating, maintaining and managing a successful channel including guided lessons, courses, boot camps, tutorials on a wide range of topics including copywriting, editing, monetization and much more.

YouTube Studio is the back-end service for YouTube creators, allowing them to perform a number of functions including managing and uploading videos, view analytics, managing comments and transcriptions. YouTube Studio provides a comprehensive suite of quantitative data, free of charge to creators, to help manage and build their channel with a range of features including "Creator Dashboard" and YouTube Viewership Analytics which provides viewership data with live data visualizations that facilitate comprehensive understanding of audiences including size, location, demographics, attention tracking, and more.

YouTube Spaces is made up of ten production facilities that provide creators with studios, services, and networking opportunities, at no cost. Creators with at least 10,000 subscribers (1,000 for registered non-profits) and no strikes on their channel are eligible to apply to YouTube Space. Creators must also pass an orientation called "Unlock the Space." YouTube Spaces have a three distinct purposes: (1) help creators learn production skills; (2) facilitate the production of videos; and, (3) connect creators with each other. Toronto's YouTube Space is the newest space which opened in 2016. The other Spaces are located in Berlin, Los Angeles, Paris, Rio, Tokyo, Dubai, London, Mumbai and New York City, with pop-ups in Montreal, Moscow, Jakarta, Washington DC, and other global cities.

YouTube Partner Program is the YouTube's core monetization instrument for creators. Membership in the YouTube Partner Program is required to earn revenue through the platform. In order to be eligible for monetization, channels must have more than 1,000 subscribers; 4,000 watch hours in the previous twelve months; content that complies with Partner Program policies; and, an AdSense account. There are three main types of YouTube ads: (1) TrueView - skippable ads, at the beginning of videos; (2) Bumpers - non-skippable 6-second ads that play before a video; and, (3) Other display advertising of various formats.

YouTube VR/360 video enables consumers to see a video from different perspectives. For 360 video, no headset is required; viewers use a mouse (on a desktop) or a finger (on mobile). VR offers an immersive experience through the use of a headset that splits the screen so the viewer can experience depth perception as they would in real life. Headsets that are required to view VR, such as Google Cardboard, are available for as little as \$20.

YouTube Cards/Annotations can be added to videos, and appear on screen at a specified time in the video, showing consumers a URL, image or text. YouTube Cards are currently replacing annotations which function as a similar feature.

YouTube Channel Memberships can be offered by creators with more than 1,000 subscribers. For a monthly fee, members get perks like badges, emojis and other benefits determined by the creator (such as members-only posts and live chats). Creators receive 70% of the revenue and YouTube covers all of the transaction costs.

YouTube Help Center is for both creators and consumers; it includes tabs such as "getting started on YouTube" and "problems playing videos."

YouTube Help Forum is a public forum where any user with a Google account can post YouTube related questions, issues and announcements, including updates from YouTube team members, creators and consumers.

YouTube Live-Streaming enables channels to share content with their audiences in real time. Creators can set up a live-stream in advance, stream from a webcam or a smartphone with the mobile app.

YouTube Merchandise Shelf allows creators to advertise their branded merchandise on a virtual shelf. In order to be eligible, a channel must be a YouTube Partner; have 50,000 subscribers; and have no strikes against their account.

YouTube SuperChat enhances live chats between creators and their audiences. SuperChat allows audiences to pay to have their message highlighted and pinned in the chat for a set amount of time.

Famebit by YouTube is a marketing platform that connects YouTube creators and influencers with brands and agencies that are a fit with their channel to facilitate partnerships and sponsorships.

1.1.7: Algorithms

YouTube's core IP is often considered to be the algorithms that crunch the data derived from the digital platform. Similar to other digital media services, YouTube's algorithms are frequently described as "black boxes" because details about them are undisclosed.

On YouTube, a variety of complex algorithms are used to classify videos, apply and enforce Community Guidelines and Advertising Guidelines, surface relevant results in response to search queries, and recommend videos to users. Automated systems and algorithms are essential to the functioning of a platform of YouTube's scale.

Related to the algorithmic functioning of YouTube is the auto-play innovation introduced in 2014, which further simplifies viewing on the platform. When a video ends, another automatically plays, based on viewing history, with videos continuously playing for up to four hours.⁵¹ Auto-play can be turned off using a toggle at the top of the "Up Next" queue. This setting will remain off until it is turned back on. Auto-play has become an integral part of the binge-watching culture era and similar algorithms are used on multiple digital platforms such as Crave TV, Netflix, and Facebook.

ALGORITHMS

Google search defines an algorithm as "a process or set of rules to be followed in calculations or other problem-solving operations, especially by a computer." Put simply, an algorithm is a mathematical process; basic addition, for example, is technically an algorithm. At the core of YouTube's IP are the algorithms that run the platform. How YouTube's algorithms calculate audience and revenue, set advertising rates, make viewing recommendations, incentivize clickbait content, reinforce personal filter bubbles, or even accelerate views of polarizing or obscene content has been the subject of both research and controversy, perhaps intensified by the mystery of nondisclosure. It is known that YouTube algorithms use a 'collaborative filtering analysis' computational principle, common among personalization algorithms, meaning that the formulas take into account multiple viewing practices. Recent academic research* suggests transparency on the back-end of algorithms, not just specifically to YouTube, would not fully explain digital media popularity metrics because of the complex, fluid interaction between front-end consumer attention, viewing choices, and even the cultural zeitgeist.

*Rieder, B., Matamoros-Fernandez, A. & Coromina, O. (2018). From ranking algorithms to 'ranking cultures': Investigating the modulation of visibility in YouTube search results. *Convergence* 24 (1). 50-68.

1.1.8: The YouTube mission

The YouTube platform is a technological invention that is cost-free, ungated, on-demand 24/7, and accessible globally to creators and consumers. Anyone with a camera and Internet access can be a creator. Anyone with Internet access and a compatible screen can be a viewer.

YouTube states their mission⁵² is to “give everyone a voice” and “show them the world,” a duality that directly asserts the co-dependency of YouTube creators and consumers on the platform. As such, YouTube creators and consumers⁵³ comprise the heart of YouTube.

The company cites “4 central freedoms” that guide corporate decision-making: (1) an open platform dedicated to free expression, (2) free access to information, (3) to help creators succeed, and (4) to help creators and fans find a sense of belonging.⁵⁴

This report focuses on examining these claims for the purpose of assessing the values that YouTube contributes to Canada’s national media ecosystem.

Recent Canadian research⁵⁶ conceptualized the screen media value chain in three parts. Similarly to industries such as pharma and auto, the value chain progresses linearly from R&D through manufacturing to ROI. As per Figure 1.1 below, for screen media these three phases of the value chain translate to development, production, and monetization (including distribution via various technologies such as broadcast and OTT and monetization via various methods including advertising and subscription). The same research observed that the Canadian content drama value chain has emphasized the middle of the value chain, i.e. production, while exhibiting relatively weak linkages between development/R&D and monetization/ROI (since imported Hollywood content tends to substitute for Canadian content ROI). Canada’s strategic policy focuses on the middle phase, manufacturing, empowering the Canadian system to take advantage of the demand for production services and consequently, to build a world-class media infrastructure and workforce. This supply-side policy focus is always aligned with costs, and may also explain why the value of Canadian content tends to be calculated by totalling investments such as production budgets or the volume of productions, jobs, or subsidies to the sector.

Our research on YouTube suggests that YouTube has a very different value chain, one that might be seen as complementary to the Canadian content drama value chain. In contrast to weak linkages between creators and consumers, the YouTube value chain *intensifies* linkages between creators and consumers, while collapsing the production phase. The YouTube platform prefers content that is informally produced and uploaded often, facilitating direct, instant linkage between creator and consumer. As per Figure 1.1, rather than a chain of value, this might be characterized as a spiral of value. As creators engage with audiences via numerous types of feedback, they respond by creating more content to attract more audiences, which can translate to more revenue. YouTube’s fast feedback loop fuels a value spiral that starts out tiny: one video upload entitles the creator to YouTube audience analytics.

1.2 YOUTUBE GLOBAL: LIVING LAB LINKING CONSUMERS AND CREATORS

1.2.1: YouTube value chain

The concept of a value chain, attributed to Harvard business strategist Michael E. Porter, is a widely accepted paradigm for strategic analysis of industries.⁵⁵ A value chain is a simple tool to help understand where and how value is created from the various activities necessary to invent, manufacture, and bring a product to market.

The sustained growth and popularity of YouTube can be further explained by classic paradigms of brand management, as put forward by other Harvard business strategists, Theodore Levitt and Clayton Christensen. YouTube is a strong brand because it has a clear purpose (organize the world’s video) and performs this job for customers in a way that is easy and convenient.⁵⁷

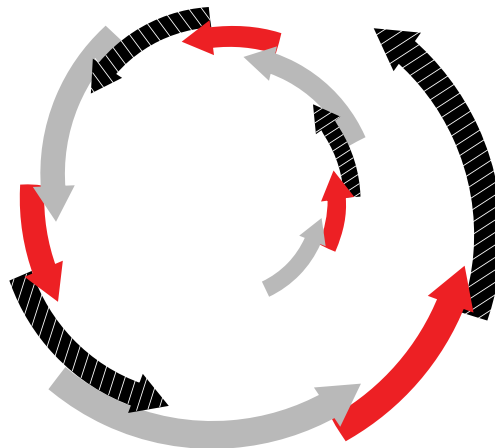
FIGURE 1.1: SCREEN MEDIA VALUE CREATION

■ development ■ production ■ monetization ■ site of value creation

A. CANADIAN CONTENT (DRAMA): VALUE CHAIN



B. NATIVE YOUTUBE CONTENT: VALUE SPIRAL



1.2.2: A living lab facilitating the rise of a new group of creative entrepreneurs

YouTube can be considered a living lab linking creators and consumers. Living labs are characterized by experimentation in a real world setting. Creators have the ability to constantly “beta test” their content and receive live feedback from users. YouTube itself has access to mass amounts of quantitative and qualitative feedback from creators, consumers, and advertisers using the platform. Ultimately, YouTube as a living lab might be characterized as an ongoing experiment about the new opportunities for Canadian content in an arena of open, global competition.

As will be evidenced in the following pages, YouTube has empowered the rise of a new group of Canadian creative entrepreneurs who are intently focused on audiences and monetization of their creative content. More than 160,000 Canadian creators have emerged on

YouTube, with about 25% of them (40,000)⁵⁸ meeting YouTube’s basic requirement for monetization of more than 1,000 subscribers.⁵⁹ YouTube might also be described as a boot camp where creative entrepreneurs learn while doing all aspects of screen media work, from R&D to manufacturing to ROI.

As a result of its value chain, the dynamics of being a YouTube creator differ from those of a legacy creator. The 1000 to 1 odds of any pitch reaching an audience do not apply.⁶⁰ There are no development wait times. No performance auditions. No gatekeepers. No fee to upload content to reach an audience. As YouTube does not acquire IP rights to content, there are no rights negotiations with platform owners. YouTube is borderless and global; there are no rights negotiations in different countries; and, there are no show cancellations unless the creator says so. Creative content, once uploaded, has the potential to create economic value 24/7, internationally and indefinitely. This type of opportunity is unparalleled in the domestic media ecosystem.

CANADIAN MEDIA POLICY, A LOOK BACK

Canada’s 20th century media policy was a great success, with outcomes including a robust Canadian broadcasting infrastructure and a world-class independent production sector. Global media dynamics in the 21st century have shifted the problem set, delivering unintended consequences to Canada’s national media system.

In 1951, Ken Cooke, a CTV executive, provided testimony at the Massey Commission hearings. Cooke argued that the path to Canadian content strength would be the open road: “If we are ever to have a Canadian culture, it will come as a result of exposure to what is undoubtedly the fastest rising culture in the world today—that of the U.S.A.”* Cooke could not imagine a service like YouTube being in existence, much less that Canada’s 21st century media market would not be just the U.S.; rather, it would be the whole world. YouTube might be theorized as a living lab, an experiment on how Canadian creators might fare in a marketplace of open competition. Our study found that Canadian YouTube creators are thriving.

*Litt, R. (1992). *Muses, Masses, and the Massey Commission*. p. 71. Litt notes the source of these remarks by Ken Cooke to the Commission as CKEY briefs vol. 7 no. 86, pp. 28-29

The YouTube platform's inherent structural efficacy might be characterized as a symbiosis that is win/win/win. The better the platform serves its creators, the greater the number of YouTube consumers, which translates into more revenue.

A consequence of these aligned interests are that YouTube services to creators and consumers are not the result of regulatory quotas or policy frameworks. Rather, they result directly from the platform's need to grow audiences in order to survive.

1.3 YOUTUBE GLOBAL: PREVENTING HARMFUL ONLINE CONTENT

Protection from harmful online content, ensuring user data privacy, and algorithmic accountability are global issues, affecting most major media platforms and concerning policy makers in many countries.

Throughout history, nearly every technology has been used for harmful purposes. Technologies such as the wheel, fire, language, gunpowder, printing press, typewriters, automobiles, airplanes, ovens, movies, money and medical discoveries, to mention a few, have all been used to commit crimes. The Internet, like any other technology, has not been immune from such abuses.

YouTube, as a free, ungated, global Internet platform, has experienced unanticipated consequences, almost since its origin in 2005. The same features that have enabled YouTube to be embraced by millions of creators and billions of consumers around the world have also allowed it to be used by a relatively small number of people for socially toxic purposes and to spread harmful content.

This section discusses 5 types of online harm and YouTube's responses: (1.3.1) strategies to remove illegal,

toxic content; (1.3.2) strategies to address problematic and/or inappropriate content; (1.3.3) strategies to ensure the platform is suitable for advertisers; (1.3.4) issues of data privacy and transparency; and (5) strategies to combat copyright infringement.

1.3.1: Illegal content

Toxic content of every conceivable variety has been uploaded to YouTube, including malicious misinformation, hate speech, bullying, sexual abuse, violence, recruitment of terrorists, and even murder. Many will recall Lonely Girl's fake story scam (2006); Islamic State's beheading of U.S. journalist James Foley (2014); YouTube #1 vlogger PewDiePie's hate speech scandal (2017); Logan Paul's suicide-victim controversy (2017-2018); and the New Zealand massacre videos (March 2019).

Canada has not been immune to disturbing incidents that exemplify the spread of extremist ideologies on digital media, including on YouTube. In February 2019, The New York Times reported that Canadian Mohammed Khalifa, a self-described employee of the Islamic State Ministry of Media, was the English-speaking narrator of one of the Islamic State's most horrifying videos, the 2014 "Flames of War."

On March 18, 2019, [The Washington Post](#)⁶¹ published an account of YouTube's efforts to stop the spread of videos of a massacre three days earlier, in a mosque in the city of Christchurch, New Zealand, in which 50 people were killed and 50 more injured. While previous violent attacks had been spread on YouTube, no previous murderer had live streamed to social media, in this case, to Facebook. YouTube strictly controls permission to live stream, requiring a validated account in good standing. Nevertheless, videos were uploaded to YouTube and spread virally.

The article describes YouTube's team of "incident commanders" working through the night to identify and take down tens of thousands of videos. Deciding that human intervention was too slow, the team disallowed the uploading of any footage of the incident and disabled certain features. But that did not work perfectly

either. After 24 hours, the New Zealand problem was mostly under control, yet challenges remained.

The article further states that YouTube's efforts to combat recent abuses such as Russian disinformation, hateful conspiracy theories, and harmful children's content, including pedophile and suicide scandals, have included hiring 10,000 human content moderators; initiating a "breaking news" and "top news" shelf to help verify content by authoritative sources; and changes to algorithms to prevent the spread of such content.

A takeaway from the New Zealand incident is that neither AI nor algorithms, even those invented by Google, are yet sophisticated enough to outwit all human evil-doers. Efforts for the near future will involve a strategic combination of automated and human intervention. Another takeaway from the tragedy is media's role as the messenger. Less than two weeks after the attack, New Zealand took action to ban semiautomatic assault weapons, a technology with no public benefit to civil society. New Zealand did not ban the Internet.

Ongoing work to keep the platform free of harmful content and a safe space for creators, consumers, and advertisers is an explicit priority for YouTube. Alphabet's Q4 earnings report states: "A big priority for YouTube in 2019 is to continue our work to quickly find and remove content that violates YouTube's Content Guidelines. It's an important challenge, and with advanced machine learning and investments in human reviewers, we are making continued progress."⁶²

1.3.2: Borderline content

In addition to illegal content, there is a category of harmful content that does not clearly break the rules but goes to the edge of appropriate in multiple arenas such as sexual content, hate speech and/or violence. Borderline harmful content is another category that presents complex challenges, particularly relating to free speech. YouTube's aggressive policies to reduce all types of harmful content are an ongoing priority.

The 2018 YouTube policy transparency report indicates that about 2.4M channels are removed per quarter, for

content violations.⁶³ YouTube invests in initiatives to address borderline content. The strategies have evolved in an attempt to keep pace with the abuses and include creator, consumer, and advertiser facing strategies.

On the creator side, [YouTube's Community Guidelines](#) define the parameters of what content is permitted on the platform. On the consumer side, YouTube has engaged its nearly 2B user community to help flag inappropriate content, including a three strike system. Both initiatives are described below.

The [Creators for Change](#)⁶⁴ program is a global YouTube initiative launched in September 2016 in recognition of the power of video generally, and the potential of YouTube to generate positive social impact. The initiative is dedicated to amplifying the voices of channels that are combating issues such as hate speech, xenophobia and extremism, or are making the case for greater tolerance and empathy toward others. This initiative is backed up with resources and grants to YouTube creators who are positive role models. Creators who wish to enter the program pitch an idea for a video or series that will have a positive social impact. If selected, YouTube gives creators a monetary grant and invites them to their London headquarters for a two day workshop. Annual investment in this project has grown from \$1M to \$5M. The 2018 Creators for Change included Canadians [AsapSCIENCE](#) and [The EhBee Family](#) (a channel by a family of four from Vaughan, Ontario with 2.1B views and 8.5M subscribers as of April 2019), that self-describes as "crazy fun family videos." The Bee's have appeared on Good Morning America.

YOUTUBE COMMUNITY GUIDELINES

In addition to corporate strategies to manage platform abuses, YouTube's responses include initiatives designed to engage creators and consumers in keeping the platform safe.

For creators, YouTube has a series of [Community Guidelines](#) that are introduced as follows: "When you use YouTube, you join a community of people from all over the world. Every cool, new community feature on YouTube involves a certain level of trust. Millions of users respect that trust and we trust you to be responsible too. Following the guidelines below helps to keep YouTube fun and enjoyable for everyone." The page sets out in plain language the prohibitions of 11 types of content: nudity and sexual, harmful or dangerous, hateful, harassment and cyber-bullying, spam, misleading meta-data and scams, threats, copyright, privacy, impersonation, and child safety.

For consumers, YouTube has engaged its 1.9 billion users to help [flag inappropriate content](#) with a three strike system leading to [account termination](#). The flagging system is explained as follows: "You might not like everything you see on YouTube. If you think content is inappropriate, use the flagging feature to submit it for review by our YouTube staff. Our staff carefully reviews flagged content 24 hours a day, 7 days a week to determine whether there's a violation of our Community Guidelines."⁶⁵

YouTube reserves the final say in policing its platform, as anchored by this statement on the [Community Guidelines webpage](#): "If a YouTube creator's on- and/or off-platform behaviour harms our users, community, employees or ecosystem, we may respond based on a number of factors including, but not limited to, the egregiousness of their actions and whether a pattern of harmful behaviour exists. Our response will range from suspending a creator's privileges to account termination."

Despite ongoing challenges, our data suggests that the majority of Canadians either agree or are neutral on the issue of whether YouTube does a good job of screening out inappropriate content. While many are neutral, few respondents disagree.

1.3.3: Monetization

YouTube views channel monetization as a privilege, rather than a right. Brand safety and suitability are key concerns, given YouTube's advertising business model. The platform's role is to act as matchmaker between the content and the advertiser, with appropriateness for monetization assessed per video, rather than by channel.

YouTube offers assistance to help creators make their content suitable for advertising. "[Advertiser Friendly Guidelines](#)" stipulate the type of content that is not

suitable for advertising. It describes best practices in creating advertiser friendly content and explains what a creator can do if they want to upload a video that is not suitable for advertising. The straightforward answer is to turn off monetization. If ads get attached to unsuitable content, the creator risks losing monetization privileges.

The platform reserves the final say if any of their enforcement policies are broken. In our research, we heard that creators sometimes disagree with YouTube's decisions.

Despite some complaints, 98% of YouTube creators never break the Community Guidelines and 94% who

do receive a first strike, never receive a second one.⁶⁶ The results of our survey confirmed this, indicating that the majority of Canadian YouTube creators are satisfied with their relationship with YouTube (Figure 1.3).

Strategies to further protect advertisers from harmful content include Google Preferred, a YouTube program launched globally in 2014 (2015 in Canada) that helps brands reach top-tier creators and high-performing videos. The program is purposed to give advertisers the security that ads will be played on channels that regularly produce high-quality content and to protect advertisers from having their products being promoted adjacent to inappropriate content. In further efforts to tighten the platform, Google has recently made Google Preferred more difficult to join and added additional security by manually reviewing all videos in this program.

1.3.4: Data privacy

The protection of personal data is another current global concern. YouTube, as a Google subsidiary, plays a role in issues of data privacy. It is almost as difficult to avoid using YouTube as it is to avoid using Google. Google user data automatically becomes YouTube data and vice-versa. Even “anonymous” users can be profiled by virtue of being online, allowing content recommendation based on user preferences. While sites like Facebook, Twitter or LinkedIn require a log in, YouTube’s passive usage (our research found more than 50% of Canadian users access YouTube without an account) does not actively require identification through interaction with the site, and thus may create an arena where targeted marketing is less intrusive.

1.3.5: Copyright

Copyright infringement is a legal harm. Arguably, copyright abuses were one of YouTube’s first challenges. Since YouTube does not acquire IP rights to any of its content, copyright infringement has existed on the site since the early days of the platform. Today robust features invented by the platform appear to have these issues under control.

YouTube has features that enforce copyright, such as Content ID. Content ID works by scanning uploaded videos against a database of files submitted by content owners. If content in a YouTube video matches a new upload, the content owner has three choices about what action to take, and the choices available can be made by the content owner, on a country by country basis. Creators can (1) block the video from being viewed; (2) monetize the video with ads and in some cases, share revenue with the uploader; and, (3) track the views. Copyright Match is a newer program being piloted with a limited number of channels, and is purposed to finding exact or near matches of copyrighted material that has been uploaded, even if the audio has been dubbed.

More than 98% of copyright infringement is captured through Content ID,⁶⁷ which is used by more than 9,000 YouTube partners including network broadcasters, movie studios and music labels. The partners have claimed over 800M videos to date⁶⁸ and YouTube had paid out more than \$4.4B CAD to users as of November 2018.⁶⁹

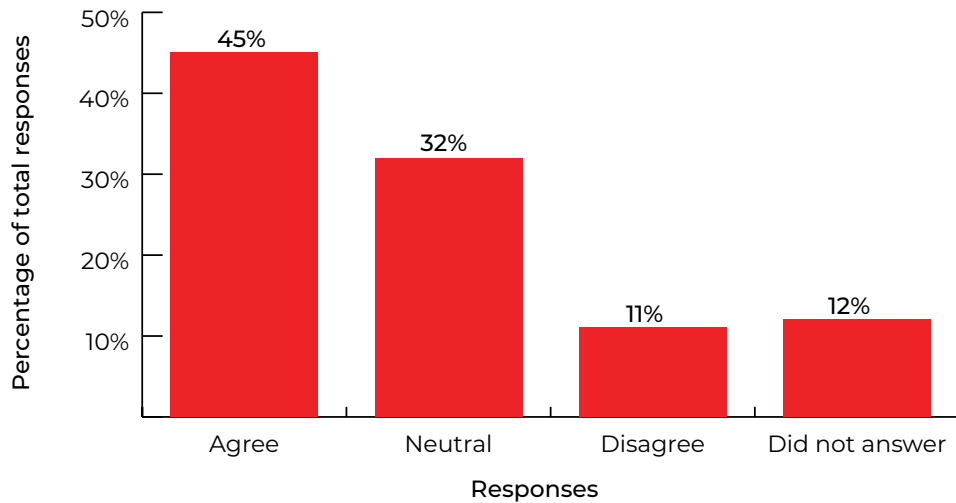
“There isn’t much I would change on my end - but I wish YouTube was more transparent about what gets videos demonetized so that I don’t repeat the same mistakes. My videos are very family friendly and they sometimes get demonetized without rhyme or reason.”

- Canadian YouTube creator discussing what they would change about their experience as a YouTube creator

“YouTube REALLY needs to work on their monetization, transparency and how they apply rules. February 2018 was hard on the whole community and I’m not over having gotten demonetized.”

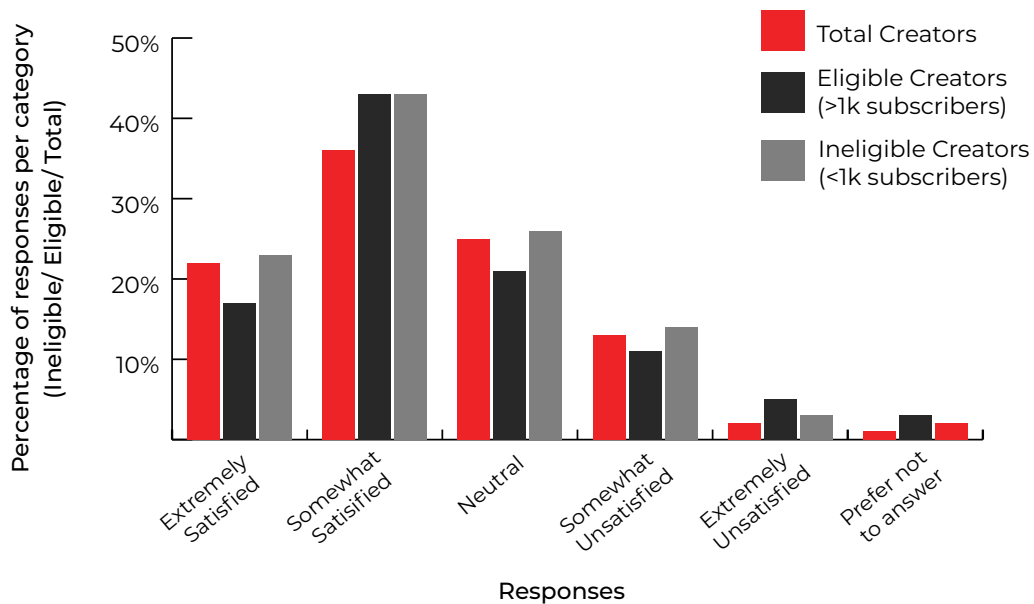
- Canadian YouTube creator on one thing they would change about their experience as a YouTube creator

FIGURE 1.2: CANADIAN YOUTUBE CONSUMERS: AGREE (OR NOT) THAT YOUTUBE IS DOING A GOOD JOB AT REMOVING INAPPROPRIATE CONTENT



Note: "Strongly Agree" and "Somewhat Agree" were combined as "Agree," "Strongly Disagree" and "Somewhat Disagree" were combined as "Disagree"

FIGURE 1.3: CANADIAN YOUTUBE CREATORS ARE MOSTLY SATISFIED WITH THEIR RELATIONSHIP WITH YOUTUBE



CANADIAN YOUTUBE CREATORS

Embracing Local & Global Audiences



LILLY SINGH

3B VIEWS
14.7M SUBSCRIBERS

As of April 2019

Lilly Singh is an international sensation best known for her observational comedy that frequently references her Punjabi-Indian roots and Sikh heritage. Singh is a Scarborough, Ontario native who launched her channel in 2010, as a way to cope with her depression. Her hilarious and positive messages of living an authentic and inspired life have been devoured by audiences around the globe. Singh's viral video hits include, "What Canadians Really Want to Say to Americans," "When You Don't Know the Name of a Song" and "Types of People at Airports," "How Girls Get Ready" and "Types of Kids at School". Singh has been featured on YouTube's annual Rewind since 2014. In 2016, Singh worked with YouTube Originals on her first feature film, "A Trip to Unicorn Island". In 2017, Singh's first book, *How to be a Bawse: A Guide to Conquering Life*, catapulted to a #1 New York Times best seller. Also in 2017, Singh ranked first on the Forbes "Top

Influencers" list in entertainment and tenth on its list of the world's highest paid YouTube stars, earning a reported \$10.5M. Singh has received numerous awards including an MTV Fandom Award, four Streamy Awards, two Teen Choice Awards and a People's Choice Award. She has collaborated with other celebrities including Michelle Obama, Will Smith, Alicia Keys, Selena Gomez and Dwayne 'The Rock' Johnson. On March 14, 2019, it was announced that Singh would take over Carson Daly's late-night timeslot on NBC. This move makes Singh the only female to currently host a late-night talk show on a "Big 4" network. NBC notes that the show will be renamed "A Little Late with Lilly Singh" and is set to launch in September 2019.

AYSHA HARUN

17.6M VIEWS
266K SUBSCRIBERS

As of April 2019

Aysha Harun is a Harari-Canadian YouTube creator. She launched her channel in 2011 which features vlogs and tutorials in beauty, lifestyle, food, fashion and travel. Harun describes herself on her YouTube page as “a Canadian gal redefining what it means to be beautiful.” In 2017, Harun appeared as a Featured Creator at the annual VidCon event held in Anaheim, California and spoke as a panelist on the subjects of diversity on YouTube, and the beauty and fashion community on YouTube. That same year she was named one of YouTube’s “Women To Watch.” Harun has a background in Business Administration and graduated from Wilfred Laurier University in 2017.

“I have the ability to inspire others globally with my Canadian creativity.”

**CANADIAN YOUTUBE CREATOR
MARCH 2019**

In this study, YouTube creators are defined as they are by YouTube, as anyone who uploads a video. This service is free but requires signing up for an account and providing an email address. The act of uploading a video, whether that video is set to private or public, automatically creates a channel, defined as simply the homepage of an account.⁷⁰ A homepage displays information such as the date launched, “about” information, and the number of views. On YouTube, channel and creator are nearly synonymous, with the channel being populated by the creator’s content.

In this chapter, we report the results of our survey of Canadian YouTube creators. As previously stated, there are 40,000 eligible Canadian YouTube creators which means that their channels have qualified for monetization as per the Partner Program.⁷¹ In order to qualify for this program a channel requires 1,000 subscribers, more than 4,000 public watch hours within the previous 12 months, no strikes against the channel, and a human review of the channel to confirm eligibility. Our sample of 1,268 creators⁷² included 328 eligible creators, or 25.8% of those surveyed. Therefore it is estimated that there are 160,000 Canadian YouTube creators, given that approximately 40,000 are eligible for monetization.

2.1 CANADIAN YOUTUBE CREATORS: DIVERSITY

YouTube’s founding principle, “give everyone a voice,” invites diverse creators to produce diverse content that appeals to diverse audiences. Our data suggests there is diversity among YouTube creators across a range of socioeconomic parameters including age, language, gender, geography, ethnicity, and ability.

Unsurprisingly, our data indicates that Canadian YouTube creators are young. More than a third are under 25, and nearly three-quarters are under 45 years of age. Yet, as will be explored in Chapter 3, the content they produce appeals to Canadians of all ages.

Our survey was available in both of Canada’s official languages, French and English. Ten percent of our respondents chose to take the survey in French.

Our survey results indicate that Canadian male YouTube respondents outnumber female 66% to 30%; for comparison, globally, 62% of YouTube creators are male.⁷³ Looking at our survey results by genre, male respondents dominate in video gaming, while females are the majority in the lifestyle and family genres: perhaps a surprisingly traditional category breakdown for a population of young creators!

Canadian YouTube creators come from across Canada, in a similar geographic distribution to that as creators in the legacy system.⁷⁴ Our data shows that nearly half of the creators surveyed live in Ontario with the next largest percentages in Quebec, British Columbia, and Alberta.

Eighteen percent of our respondents self-reported as “visible minority,” not significantly different than Statistics Canada’s report indicating that 20% of Canada’s population identify as visible minorities. Three percent of YouTube creators in our survey self-reported as Indigenous, whereas national statistics show that Indigenous people make up 4.3% of Canada’s population.⁷⁵

FIGURE 2.1: CANADIAN YOUTUBE CREATORS BY AGE

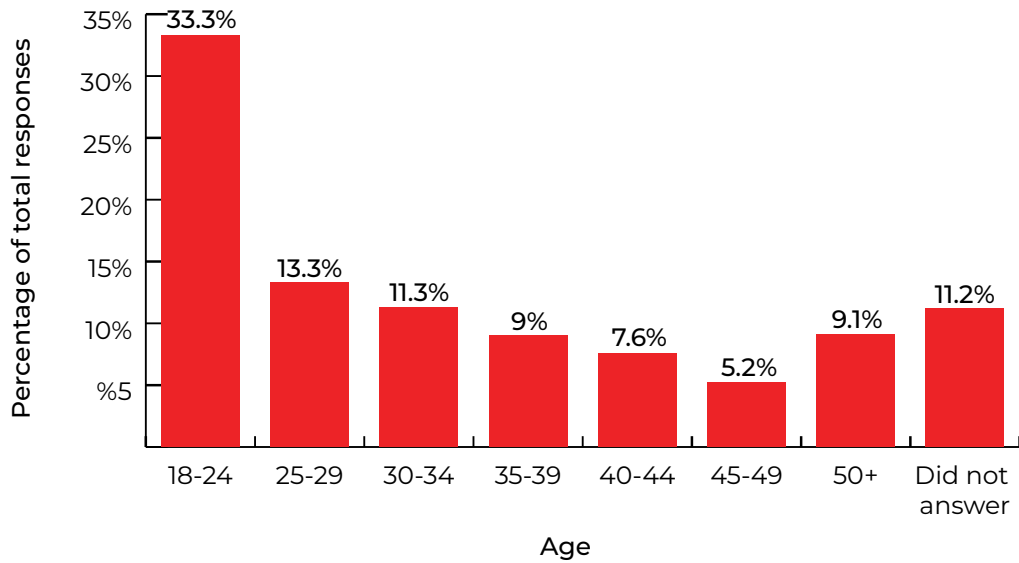


FIGURE 2.2: CANADIAN YOUTUBE CREATORS: LANGUAGE CHOSEN TO TAKE SURVEY

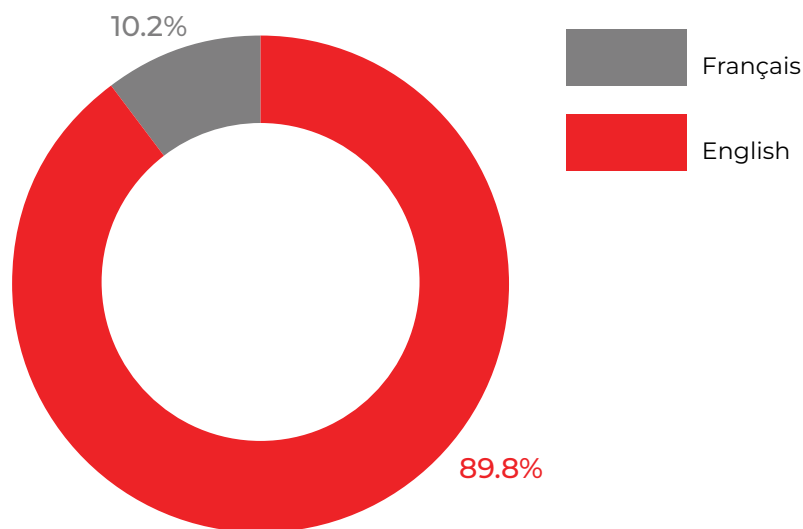


FIGURE 2.3: CANADIAN YOUTUBE CREATORS BY GENDER

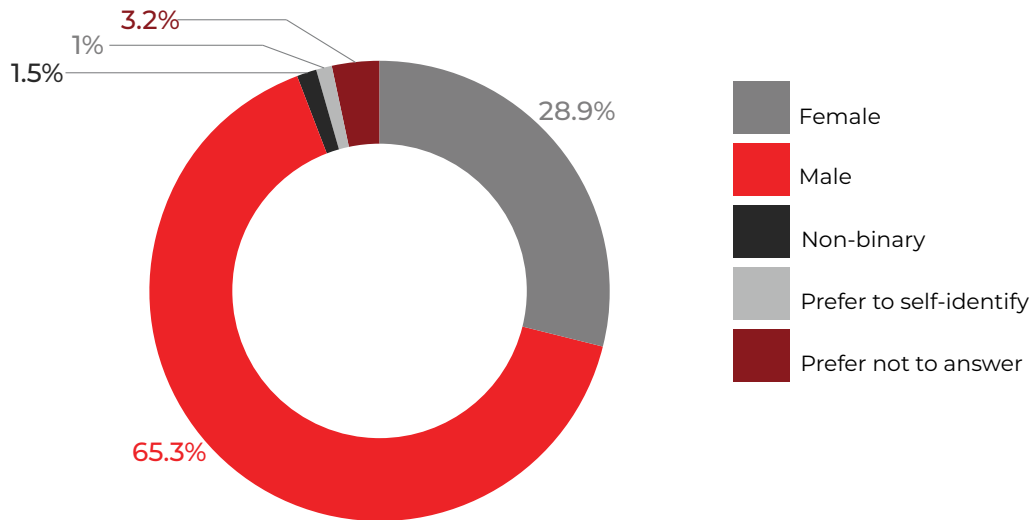
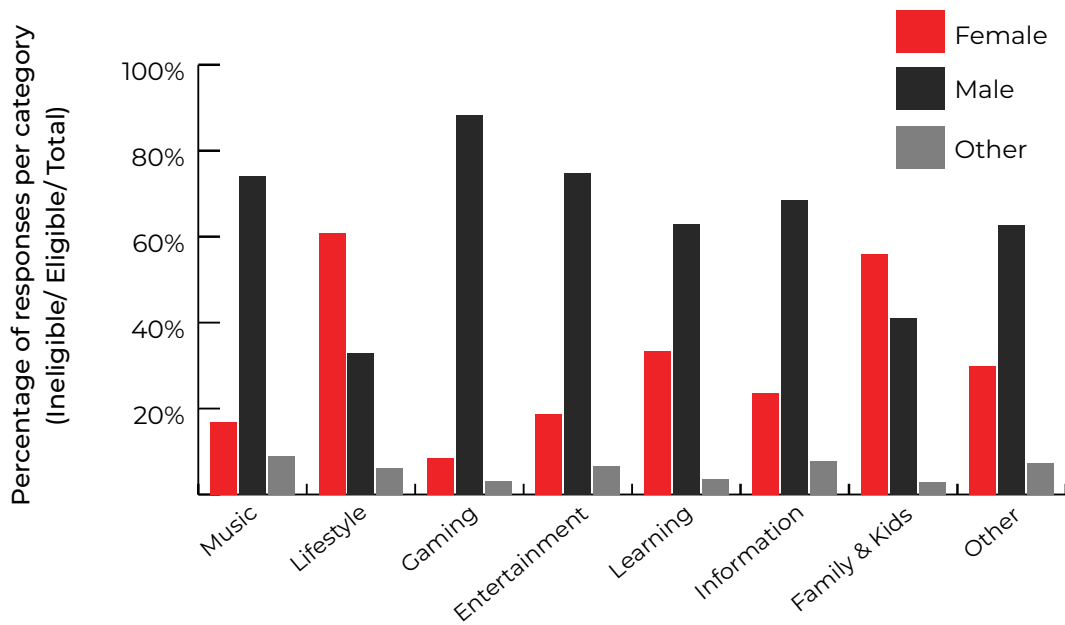


FIGURE 2.4: CANADIAN YOUTUBE CREATORS: COMPARING GENRE TO GENDER



Note: Respondents in the “Other” category include those who selected “Non-binary” “Self identification” and “Prefer not to answer”

FIGURE 2.5: CANADIAN YOUTUBE CREATORS BY PROVINCE

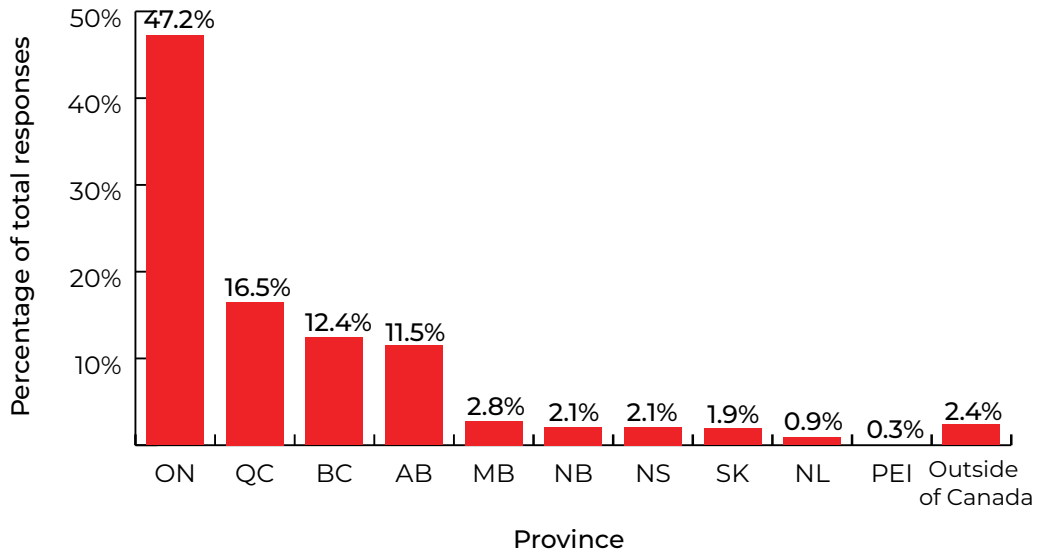
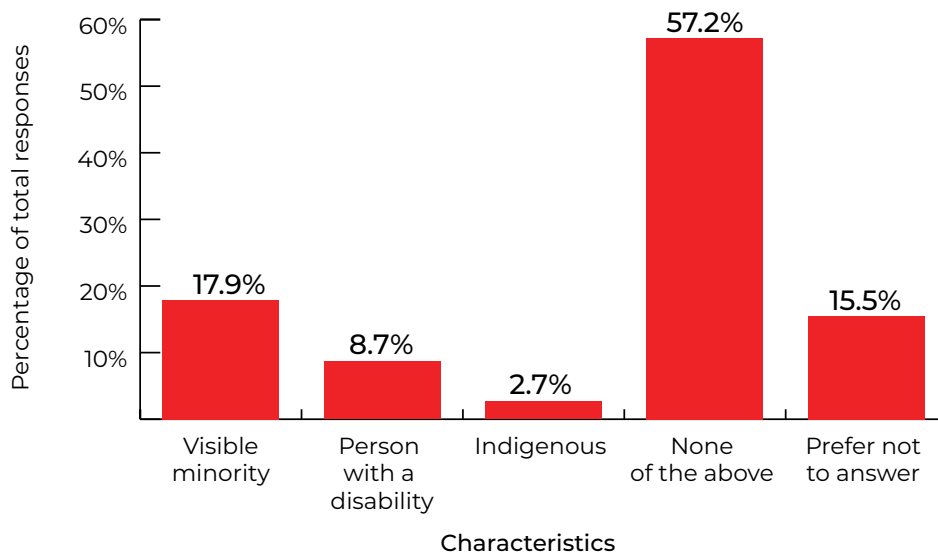


FIGURE 2.6: CANADIAN YOUTUBE CREATORS BY OTHER IDENTIFYING CHARACTERISTICS



Eight percent of YouTube creators in our survey reported having a disability, compared to 14% in Canada's population.⁷⁶

Most creators work both in front of and behind the screen. Therefore these diversities could be considered representative of diversity in screen media. Diversity is achieved in the absence of quotas, language or regional incentives, but is instead the result of a value chain that tightly links creators with consumers. Clearly, a diversity of creators appeals to a diversity of consumers.

2.2 CANADIAN YOUTUBE CREATORS: THE RISE OF NEW CREATIVE ENTREPRENEURS

An entrepreneur (referencing Google and Merriam Webster dictionary) is defined as a person who organizes, manages and operates a business, and assumes financial risk in doing so. Given this definition, a key story that emerged from our study is that YouTube appears to have facilitated a new and distinct group of Canadian creative entrepreneurs who create content that is personal and who focus on building their audiences with their content.

Canadian YouTube entrepreneurs include global stars with billions of views in every official genre on the platform: Music, Lifestyle, Entertainment, How To, Family, and News and Information. There are many Canadian creators with "merely" millions of views and "only" hundreds of thousands of subscribers. YouTube reports that there are more than 230 Canadian YouTube channels with over 1 million subscribers.⁷⁷ It is important to note here that the number of subscribers averages to about 14% of views.⁷⁸ Here is a brief introduction to just a few Canadian creative entrepreneurs on YouTube⁷⁹.

"I love that I can do what I love and share it with others. I used to teach the things I do on my YouTube channel and cannot do this outside my house anymore due to disability. So this YouTube channel makes me happy!"

– Canadian YouTube creator on what is most valued about being a YouTube creator

2.2.1: Billions of views

LIFESTYLE/HOW-TO/DIY/LEARNING

Canada's entrepreneurs in this category include global star [Lilly Singh](#) (2.9B views) who is a quintessential example of a wildly successful creator who has parlayed her YouTube success to break barriers in mainstream legacy media. [Unbox Therapy](#) (2.8B views) which is the top technology channel on the entire platform. Japanese-Ukrainian creator Lauren Riihimaki of [LaurDIY](#) (1B views) has evolved from a household expert into a multi-media lifestyle guru, and she also sings. [AsapSCIENCE](#) (11.8B views) is one of the platform's top learning channels. [Super Simple Songs](#) (11.8B views) is for audiences under 18. Notably, audiences rely on YouTube to learn, a consumer purpose across all categories. As discussed later in this report, our research has identified teaching to be a key purpose for Canadian YouTube creators. Consumers reported learning to be the reason that they most frequently accessed YouTube.

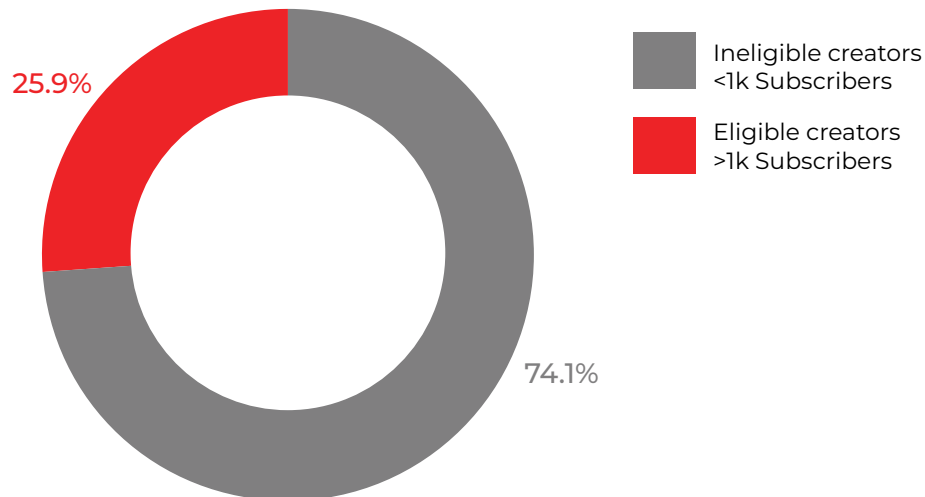
MUSIC

Canadian Justin Bieber's meteoric rise from playing guitar in his bedroom in 2007 to global pop star is YouTube legend. Other Canadian music artists also have billions of views on YouTube, including [Shawn Mendes](#) (5.9B views), the May 4, 2019 musical guest on Saturday Night Live, [Drake](#), and [The Weeknd](#) (7.6B views).

ENTERTAINMENT

[WatchMojo](#), (13B views) is one of YouTube's top channels. This listicle creating channel launched from

FIGURE 2.7: CANADIAN YOUTUBE CREATORS: PERCENTAGE OF CREATORS ELIGIBLE (MORE THAN 1K SUBSCRIBERS) TO MONETIZE CHANNEL



Montreal in 2005 by media entrepreneurs Ashkan Karbasfrooshan, Raphael Daigineault, and Christine Voulrieris. WatchMojo generates more than \$20,000 per day in revenue and employs 70 people. [Matthew Santoro](#) (1.3B views) is another infotainment channel launched in 2010 which uploads lists such as “10 FORBIDDEN Places You’re Not Allowed to Visit!” and “10 Extremely BIZARRE Phobias People Actually Have!” [Epic Meal Time](#) (1B views), is one of many YouTube genre crossovers. It is a cooking/comedy channel founded in 2010 by Harley Morenstein and friends from Montreal. Its logline is, “We make your dreams come true then we eat them.” Epic Meal Time, who has signed with a Hollywood talent agency, is known for extreme, high-calorie meals, often featuring their favourite ingredients, bacon or Jack Daniels whisky. [Simply Nailogical](#) (1.2B views) by Cristine Rotenberg of Ottawa, Ontario (who maintains her day job as a data analyst

for Statistics Canada), was profiled in Maclean’s.⁸⁰ Her channel went viral when she posted a video of 100 layers of nail polish, spawning YouTube’s “100 Layer Challenge.”

GAMING

One of the platform’s top gaming channels is [VanossGaming](#) (10.2B views) by Richmond Hill, Ontario’s Evan Fong. The channel was named by Forbes in 2018 as one of the 50 most subscribed channels on YouTube.⁸¹

NEWS AND INFORMATION

The YouTube channel by Canadian media conglomerate, [VICE](#) bills itself as “the definitive guide to enlightening information.”

2.2.2: Millions of views

LIFESTYLE/HOW-TO/DIY/LEARNING-ENGLISH

Media sensation [GigiGorgeous](#) (460M views) is YouTube's top transgender creator. Cake decor guru [Cookie/EMonster](#) (181M views), is a beauty and lifestyle channel by Adelaine Morin who introduces herself simply: "Adelaine Morin is my name and YouTube is my game." Blind beauty vlogger [Molly Burke](#) (96M views), was featured in the February 2019 Teen Vogue. [Aysha Harun](#) (17.2M views), bills herself as "A Canadian gal redefining what it means to be beautiful." [Amanda Muse](#) (9.2M views), is a Mommy vlogger who has evolved into a pan-media lifestyle brand and has been featured on [Time.com](#). [Peter McKinnon](#) (214M views) from Toronto, Ontario, launched his photography learning channel in 2010. [Home Renovation DIY](#) (48M views) launched in 2016 by Jeff Thorman of Ottawa, Ontario. Thorman's channel is dedicated to helping homeowners learn renovation with professional results. He regularly posts "how-to" and "before and after" renovation transformations. [Chris Ramsay](#) (301M views) is a destination for illusion tutorials. His channel's "about" page lists magic, puzzles, vlogs and combinations of all three. [Eileen Aldis](#) (5.2M views) and her boyfriend, Marc, both Canadian filmmakers, bought a one-way ticket and became global travel vloggers. [The Hacksmith](#) (445M views and 5.8M subscribers) is by engineer inventor James Hobson. His channel's purpose is to "take fictional ideas from movies, video games & comics, and make real working prototypes...showing the engineering process to inspire others into STEM fields, and to show that anything is possible with science!" Hobson quit his full-time job as an engineer and product developer to make his inventions on YouTube.

LIFESTYLE/HOW-TO/DIY/LEARNING-FRENCH

Popular French-speaking Canadian creators who upload in French include [Carl is Cooking](#), (40M views), whose channel includes cooking, baking and DIY. Catherine Francoeur's [GirlyAddict](#) (92M views) is about fashion, beauty and healthy living for young women. [PL Cloutier](#), (35M views), has a media production degree from the University of Quebec in Montreal. He has been a columnist for Radio-Canada and launched his own comedic lifestyle channel when his legacy media contract was not renewed. Cloutier's content includes mukbang⁸² subgenre videos.

MUSIC

[Walk off the Earth](#) (818M views and 3.5M subscribers), is a Canadian indie pop band from Burlington, Ontario, and is best known for music covers, a YouTube native music genre. Their channel took off in 2012 when the band's cover of Gotye's "Somebody That I Used to Know" reached more than 175 million views.

ENTERTAINMENT

[ElleOfTheMills](#) (144M views), a Filipino-Canadian YouTube creator from Ottawa, won the "breakout YouTuber" category at the 2018 Shorty Awards. Launched in 2012, her channel grew when her coming-of-age and coming-out videos went viral. Her online success led to a 2018 tour and signing with a top Hollywood talent agency.

GAMING

Canadian video gaming channels gamers with millions of views include [FaZe Pamaj](#) (575M views) starring Austin Pamajewon, originally from the Shawanaga First Nation, close to Parry Sound, Ontario.

NEWS AND INFORMATION

CBC News (1.2M subscribers as of April 2019) has more subscribers than any other Canadian national network news YouTube channels.

Figure 2.8 corroborates that Canadian YouTube creators are active in all the official genres, noting that the largest group of eligible creators reports “learning” as their channel’s genre. We explore the significance of this finding further in section 2.5 of this chapter. The story continues as this new group of Canadian entrepreneurs appears to be forging new paths, not only in creative arenas but also with respect to revenue, employment, and global export.

The link between creative and business endeavours emerged clearly in our survey. As Figure 2.9 shows, the number one goal of Canadian YouTube creators is to build an audience, the only achievement that enables creative content to generate revenue.

WHAT CANADIAN YOUTUBE CREATORS VALUE MOST ABOUT BEING A YOUTUBE CREATOR

“... I’ve got a career doing what I love. I’ve spent 25 years working in manufacturing and now I can retire from that and do YouTube full time. It’s also allowed me to work in Hollywood!”

– Canadian YouTube creator

“...Through the AdSense program, I am able to fully fund my hobby of paintball which I would not be able to afford otherwise. They have a symbiotic relationship. Without Paintball I would not be a creator and without YouTube, I couldn’t afford [paintball].”

– Canadian YouTube creator

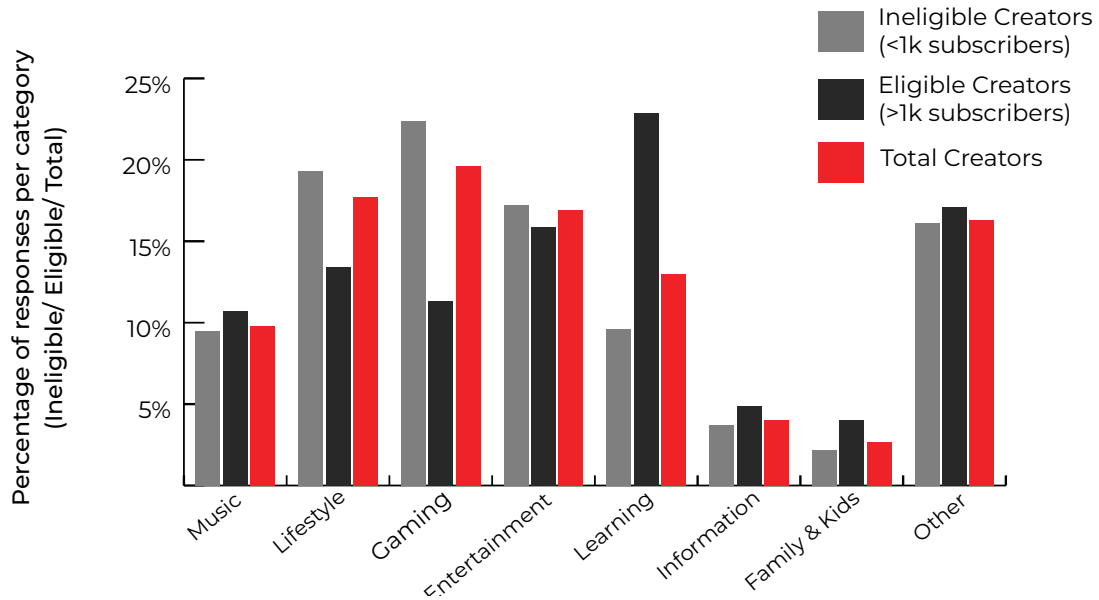
“Gagner de l’argent en faisant ce que j’aime.”

– Canadian YouTube creator

“[I value the] ability to create videos from my heart and earn money off of it. Hope to make it full-time someday.”

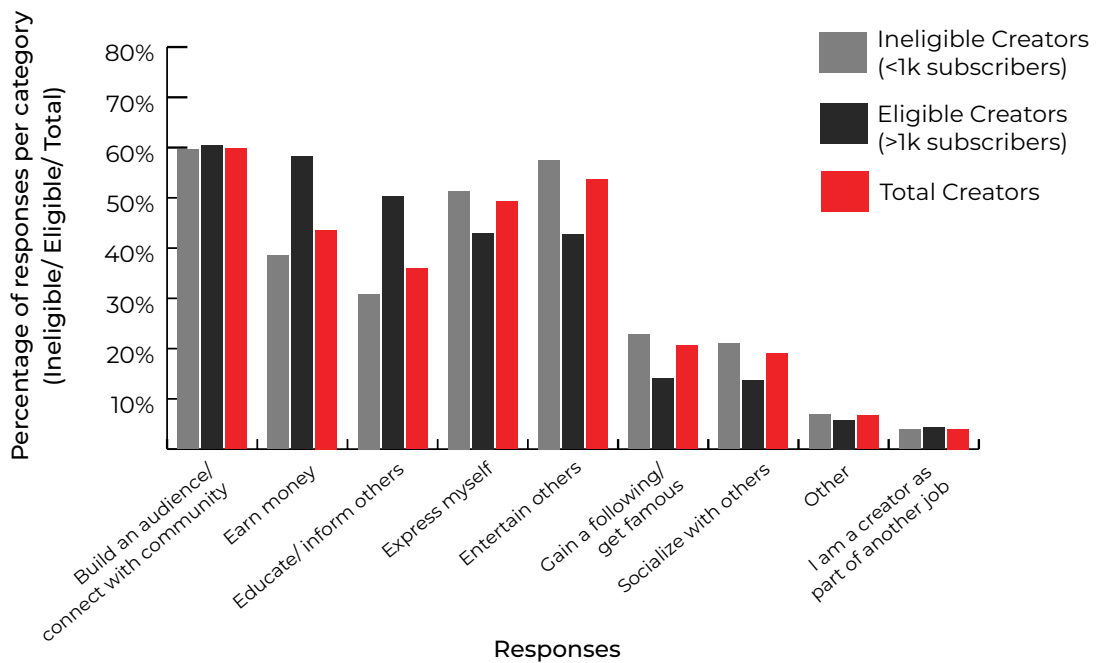
– Canadian YouTube creator on what they value most about being a YouTube creator

FIGURE 2.8: CANADIAN YOUTUBE CREATORS: GENRES



Note: Genre categories are YouTube's categories for creators

FIGURE 2.9: CANADIAN YOUTUBE CREATORS: PURPOSES



MOLLY BURKE

100.4M VIEWS

1.8M SUBSCRIBERS

As of April 2019

Molly Burke is a blind beauty and lifestyle YouTube creator from Oakville, Ontario, who shares her experiences of overcoming adversity and embracing diversity. Her career in public speaking started at the age of five when she became an ambassador for the Foundation Fighting Blindness, following her diagnosis of Retinitis Pigmentosa, a degenerative eye disease. As a teen, Burke became a Me to We speaker, travelling the world sharing her story. She won the title of Miss Teen Canada International in 2010.

Though Burke's vision continued to deteriorate with age, she has attributed much of her strength and success to the adversity caused not only by her condition, but the torment and bullying that came with it.

Today, Burke has dedicated her life to sharing her message and inspiring audiences. Her videos include beauty tutorials, stories about her life, and navigating the world as someone who is blind. She has also had collaborations with some of the biggest YouTubers, including James Charles and Colleen Ballinger. Amongst her long list of accomplishments, Burke was a torchbearer for the Paralympic Winter Games in 2009; the face of the international Dove campaign in 2017; and she appeared in Teen Vogue in the February 2019.

GIGIGORGEIOUS

466M VIEWS

2.8M SUBSCRIBERS

As of April 2019

Gigi Loren Lazzarato, better known as GigiGorgeous, is from Montreal, Quebec. She is YouTube's top transgender creator. She self-describes as a "creator, personality, model/actor, lover of beauty, fashion and a good party!" Her channel posts include vlogs, fashion and lifestyle videos and lists. Her motto: "STAY GORGEOUS. Remember you are better than anyone who hates on you for how you look, act or what your interests are!"

Lazzarato launched her YouTube make-up channel in 2008 when she was living as a gay man named Greg. In 2013, Lazzarato came out as a transgender woman and legally changed her name to Gigi Loren.

In 2014, she documented her procedures and the videos went viral. She uses her celebrity status to advocate for transgender issues, the LGBTQ community and anti-bullying. In 2014, Lazzarato received the LogoTV Trailblazing Social Creator Award.

Lazzarato's career has skyrocketed. In 2015 she starred in fellow YouTube creator Shane Dawson's debut short film *I Hate Myselfie*. She was featured in *People* magazine; has made several guest appearances on television including *Entertainment Tonight*; and, she was a presenter on MTV Music Awards. Lazzarato was featured on Kylie Jenner's app "Kylie." She has teamed with Miley Cyrus for a

feature in *Marie Claire*; starred in an Adam Lambert music video; and, won a Streamy Award for "Best Beauty Series." Other television work includes *Project Runway: All Stars*, *Me and My Grandma*, *Good Work* and *Trailblazers*, and she made a brief appearance in a 20/20 documentary about Caitlyn Jenner's transition. She has modeled for designer Marco Marco and she has also graced the covers of *Paper* and *FASHION*, and has been featured in *Galore*, *Kode*, *Refinery29*, and *Out*.

In 2016, Lazzarato was denied entry to Dubai for being transgender, resulting in more media attention and fan outrage. The hashtag #JusticeForGigi subsequently went viral.

In 2017, Lazzarato was the subject of a Barbara Kopple documentary that premiered at Sundance Film Festival: *This Is Everything: Gigi Gorgeous*. The film followed Lazzarato's transition. That same year, Lazzarato was listed as one of Time Magazine's 25 most influential people on the Internet.

In 2018, she became engaged to Natalia Williams Getty, better known as Nats Getty.

On April 2, 2019, Lazzarato released a book, *He Said, She Said: Lessons, Stories and Mistakes from my Transgender Journey*, published by Penguin Random House.



WALK OFF THE EARTH

818M VIEWS

3.5M SUBSCRIBERS

As of April 2019

Walk off the Earth is a Canadian indie pop band from Burlington, Ontario. They are best known for their music covers - one of YouTube's native music genres. The group was formed in 2006 by Gianni Nicassio, Ryan Marshall and Peter Kirkwood, but their channel Walk off the Earth was not created until 2008. In 2010, Kirkwood left the band. The same year Mike Taylor was brought onboard. The following year, Joel Cassidy and Sarah Blackwood also joined the team. In 2012 the channel took off when the band's cover of Gotye's "[Somebody That I Used to Know](#)" reached more than 175 million views in four months. This massive success led to the band being featured on YouTube's Rewind, the Ellen DeGeneres show, and signing a recording contract with Columbia Records. The original artists of the song also gave the band their praise, and the video currently has over 186 million views.

Their album was streamed by Rolling Stone in 2013 and the video of their cover of Lorde's "Royals" was featured in the 2014 Grammy Awards. In 2016, they received a Juno for Group of the Year. Their single, "Fire in My Soul" was certified gold in August 2017 and in 2018, they performed during the halftime show at the NFL playoffs.

2.3 CANADIAN YOUTUBE CREATORS: EMPLOYMENT

We asked Canadian YouTube creators if work on YouTube is a full-time or a part-time job. Figure 2.10 shows that more than half of creators work part-time on their channel, but almost one-third of eligible creators devote themselves full-time to YouTube.

Figure 2.11 suggests a progression of employment time. Most YouTube channels appear to start out as part-time work, but as the channel gains traction and becomes eligible for monetization, YouTube tends to become a full-time occupation.

This result aligns with the goals that were shared by creators, about their ambitions to be successful enough to devote their full-time to YouTube. The results indicate that beginning at about \$25,000 per year, about a third of creators appear to make YouTube their full-time focus. By the time their channels are earning \$100,000 per year, 88% of creators are working full-time as YouTube creative entrepreneurs.

“[I value the] ability to create videos from my heart and earn money off of it. Hope to make it full-time someday.”

– Canadian YouTube creator on what they value most about being a YouTube creator

Based on our survey results, we estimate the number of full-time equivalent (FTE) jobs resulting from YouTube in Canada is 15,760 FTEs.⁸³ This calculation estimates only the number of FTE jobs held by eligible Canadian creators, and does not include any staff that the channel additionally employs, as discussed below.

We asked Canadian YouTube creators whether they hire employees to assist with their YouTube channel and if

WHAT CANADIAN YOUTUBE CREATORS VALUE MOST ABOUT BEING A YOUTUBE CREATOR:

“... I’ve got a career doing what I love. I’ve spent 25 years working in manufacturing and now I can retire from that and do YouTube full time. It’s also allowed me to work in Hollywood!”

– Canadian YouTube creator

“...Through the AdSense program, I am able to fully fund my hobby of paintball which I would not be able to afford otherwise. They have a symbiotic relationship. Without Paintball I would not be a creator and without YouTube, I couldn’t afford [paintball].”

– Canadian YouTube creator

so, how many employees they hire (full-time, part-time, or casual). Figure 2.12 suggests that 20% of eligible Canadian YouTube creators create employment for others. Using this survey data, we were able to estimate that 12,173 additional jobs are created in support of eligible Canadian creators. This gives us an estimated 27,933⁸⁴ full-time equivalent (FTE) jobs created, adding together the previously calculated direct employment of 15,760 jobs to the hired employment of 12,173 FTE’s.

FIGURE 2.10: CANADIAN YOUTUBE CREATORS: TIME SPENT ON CHANNEL

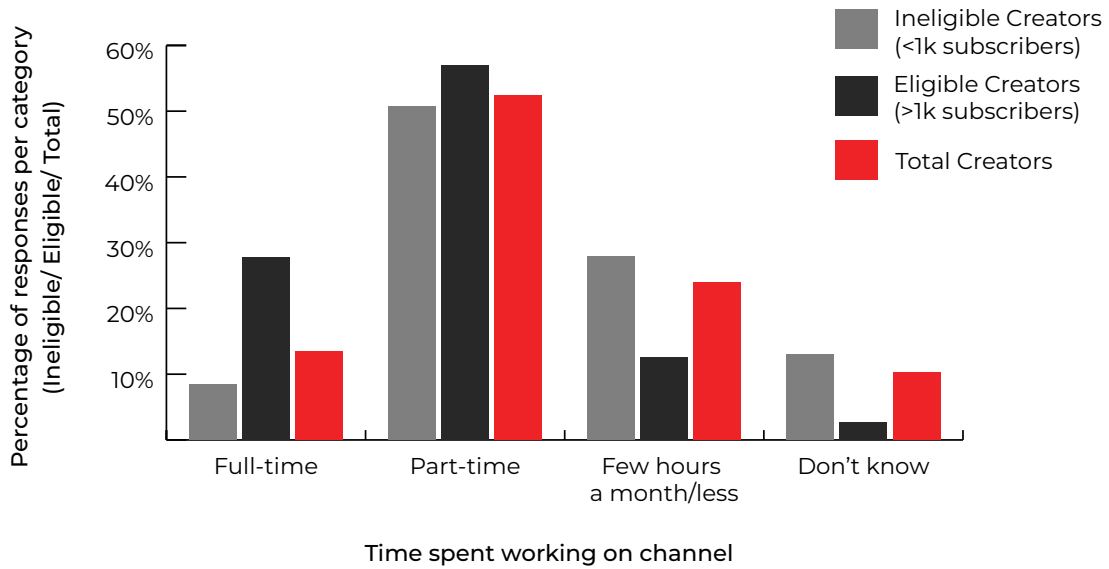


FIGURE 2.11: CANADIAN YOUTUBE CREATORS: FULL TIME/PART TIME COMPARED TO GROSS ANNUAL REVENUE



FIGURE 2.12: CANADIAN YOUTUBE CREATORS WHO EMPLOY INDIVIDUALS TO ASSIST WITH THEIR YOUTUBE CHANNEL

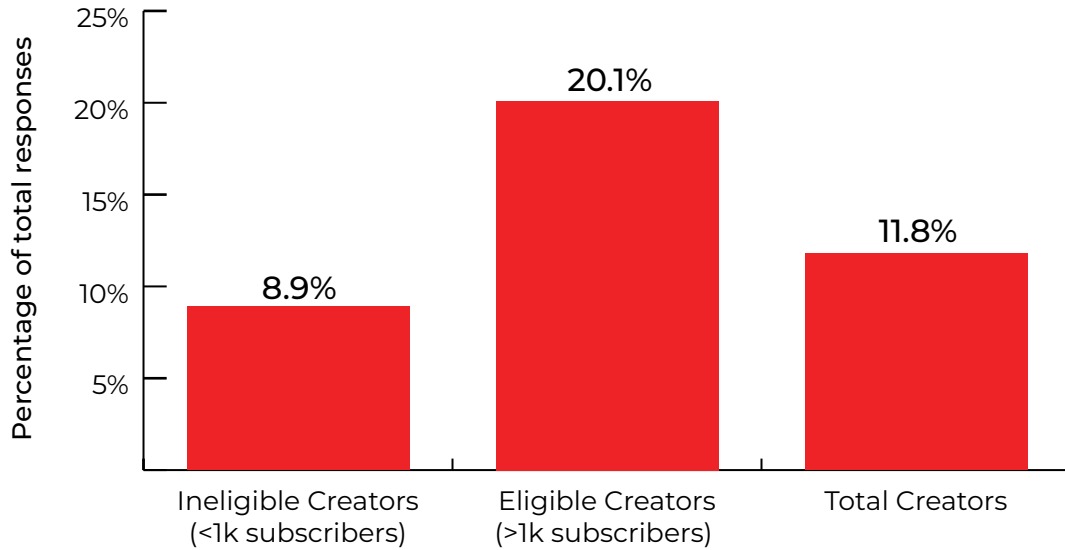
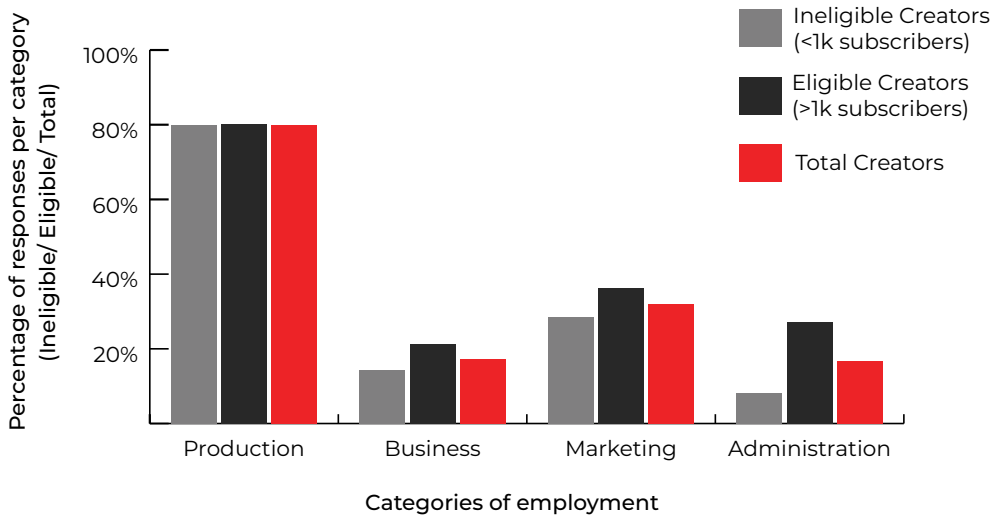


FIGURE 2.13: CANADIAN YOUTUBE CREATORS: WHO THEY HIRE



Note: Data shows percentage of respondents who employ other individuals to assist with their YouTube channel

Figure 2.12 also suggests that Canadian YouTube creators whose channels are not yet monetized and are still being developed “on spec” (to use legacy language) believe in the potential of the platform enough to employ others. However, we have not included this group in the above estimation of additional employment created by Canadian YouTube creators.

As shown in Figure 2.13, we also examined the type of jobs being generated by YouTube creators. These seem relevant for understanding the platform’s possible role in national productivity. Responses from eligible and ineligible creators suggest that skilled work is being created by Canadian YouTube creators in various areas, including production, business development, marketing and administration. Arguably, these types of jobs involve skills that are transferable from legacy media and other disrupted sectors. Notably, the jobs created can be classified as high-cognition employment, the type of work that ranks low on most disruption rankings, but adds to the possibility that YouTube may have a positive impact on Canadian national productivity, an arena that we believe warrants further study.

earn money from YouTube (meaning gross revenue to the channel, not necessarily net personal income).

Of the eligible creators, 70% reported that they do earn revenue as a result of their YouTube channel (from all sources, not just direct monetization of content through advertisements). Of this group, 61% of the channels earn less than \$10,000 in gross revenue. However, it is noteworthy that 15% of eligible creators earn \$50,000 or more with their channel; 12% earn \$75,000 or more; and 9% earn \$100,000 or more, keeping in mind that these amounts are gross revenue and must cover all production and related operational expenses.

A comparison to the risks of creative work in legacy media may be useful.⁸⁶ Studies have described a career as a creative as extremely risky. There are many unemployed workers at the margins; for example, even in Hollywood, half of the creatives are out of work at any one time. For a writer with one credit, the chances of never getting another credit are greater than any other outcome.⁸⁷ In Canada, more than half of all screenwriters earn less than \$40,000 per year.⁸⁸ Creative media work has always been a risky business.

Two key terms relating to how creators earn revenue, are AdSense and CPM. [AdSense](#) is Google’s basic monetization program. It enables advertisers to publish text, image, video or interactive media advertisements on Google’s search engine, YouTube, or websites.

CPMs are digital advertising rates or Cost Per Thousand Impressions, where “M” means “mille” or thousand, in Latin. Furthermore, on YouTube, CPM means “cost per monetized view, keeping in mind that not all views are monetized. In 2018-Q4, Adstage reported the median CPM on YouTube as \$9.88.⁸⁹ A recent Quora blog post⁹⁰ notes CPM rates vary widely (\$.01-\$10.00 per CPM), resulting from the genre, video specifics and rates in countries around the globe. Audiences in Western countries, such as Canada, the U.S. and the U.K, command the highest purchasing power and thus the highest digital advertising rates.

2.4 CANADIAN YOUTUBE CREATORS: REVENUE

2.4.1: Earnings and risk

In this section, Canadian YouTube creators will often be referred to as ‘eligible’ or ‘ineligible’ for monetization, which refers to their channel’s classification with respect to YouTube’s Partner Program.⁸⁵ As previously noted, a channel qualifies for the Partner Program with at least 1,000 subscribers (and meets other requirements), thus making it ‘eligible’ for monetization via advertising on YouTube.

Of our entire sample of Canadian YouTube creative entrepreneurs, including both eligible and ineligible, as per Figure 2.14, 19% of respondents reported they do

FIGURE 2.14: PERCENTAGE OF TOTAL CANADIAN YOUTUBE CREATORS WHO EARN MONEY FROM THEIR YOUTUBE CHANNEL

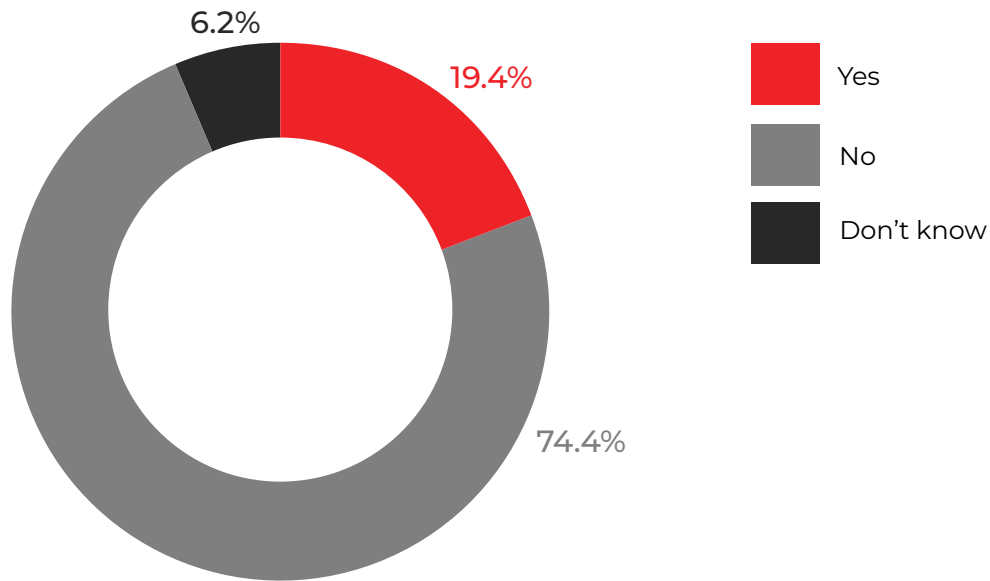
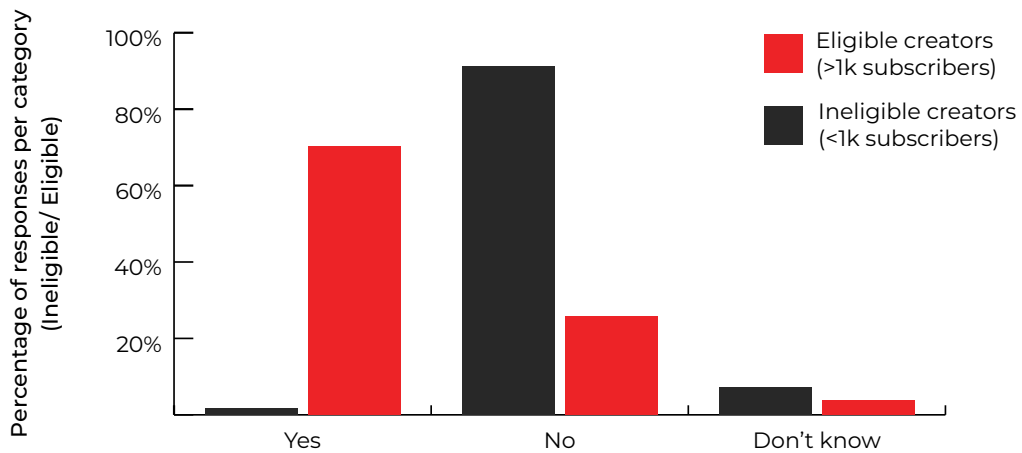


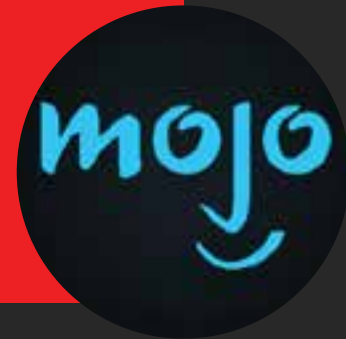
FIGURE 2.15: CANADIAN YOUTUBE CREATORS: PERCENTAGE OF ELIGIBLE/INELIGIBLE CREATORS WHO EARN MONEY



WATCHMOJO

11.8B VIEWS
20.4M SUBSCRIBERS

As of April 2019

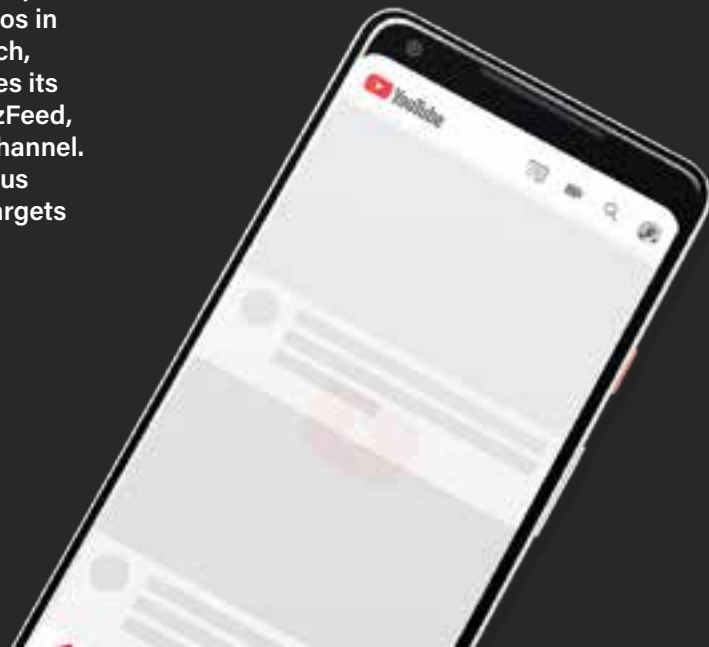


Montreal-based WatchMojo is a Canadian YouTube channel created in 2005 by entrepreneurs Ashkan Karbasfrooshan, Raphael Daigneault and Christine Voulteris. It is one of the most successful channels on the YouTube platform, often ranked in the platform's top ten sites.

WatchMojo employs 70+ full-time employees and more than 100 freelance writers and video editors. The channel creates "Top Ten" videos for anything in popular culture including celebrities, movies, television, film, music, comics, superheroes, politics and news. It has over 10,000 videos and uploads. A minimum of five "listicles" are added per day. The site averages about 5 million views per day with users accessing thousands of videos, which in turn generates an estimated ad revenue of \$20,000 per day, or \$7.3M per year. WatchMojo offers videos in numerous languages including English, French, Spanish and German. WatchMojo also licenses its content to other media sources, such as BuzzFeed, which generates additional revenue for the channel. Since 2017, WatchMojo has launched numerous brand extensions, including MsMojo which targets

a female demographic, as 62% of WatchMojo's viewers are male; JrMojo for toddlers and kids; The Lineup, a game show; live-streams in New York and London (WatchMojo Live at YouTube Space at Chelsea Market, and WatchMojo Live at YouTube Space in London at King's Cross Station, WatchMojo UK); MojoPlays, a gaming channel; MojoTalks which covers pop culture; Context which covers business and entrepreneurship; and an acquired channel, Unveiled, which is dedicated to science.

In 2016, Ernst & Young awarded Karbasfrooshan with the Entrepreneur of the Year in the Media & Entertainment category for the Quebec region, following in the footsteps of Cirque du Soleil's Guy Laliberte, a previous recipient.



“Every day, I’m terrified to find out that more of my videos, or even my channel have been demonetized.”

– Canadian YouTube creator on one thing they would change about their experience as a YouTube creator

We heard from YouTube creators that work as a creative entrepreneur on the platform comes with risks. Success is not guaranteed or easily achieved. Creators reported that the hours are long, even if their channels are successful. There is neither short-term nor long-term job security. There is no benefits package. In numerous respects, work as a creative entrepreneur on YouTube relates to discussions of the gig economy and precarious labour, another arena of our findings that deserves further study.

We also heard that one of the challenges of work as a YouTube creator is the relentless demand of the platform to post often, but sometimes even the frequency of posts does not help achieve a sense of security or longevity. Creators seem hyper-aware of a need to pivot to audience needs and ultimately to chase the dream of virality.

For some creators, the mystery of “the algorithm” appears to weigh heavily. Despite the free availability of robust, transparent audience data analytics on YouTube Studio, creators expressed frustration with the unpredictability of any specific video’s performance.

To engender stability, some creators said they rely on audiences that they consider to be deep audiences - the community who is committed and always there for them, no matter what they have most recently posted.

Deep audiences contrast with viewers that creators perceive as the shallower, transient audiences who are attracted to a particular video but who do not return to the channel.

Some YouTube creators who started their channel as a hobby said they were amazed when it took off. The more popular the channel became the more time they devoted to it. Numerous creators reported that their

goal is to figure out how to make a channel successful enough so it becomes a full-time endeavour, like many of the very visible Canadian channels in the platform’s top echelon.

“I was getting massive views, which was great. But I had a series where I uploaded a video and I didn’t perform as well as I typically perform in the first 24-hour period, which was a little weird [because] I thought it was a really interesting topic and was really relevant to a lot of my viewers...So there [are] all these issues internally from a platform perspective that there’s not a lot of information on... and you can’t control the algorithm. It’s really stressful...”

– Canadian YouTube creator, during an informal chat session

2.4.2: Alternate sources of revenue

Figure 2.16 shows the creator’s estimated percentages of total earnings from all work related to their YouTube channel. Figure 2.17 suggests that more than half of eligible creators look directly to YouTube revenue for more than half of their channel’s income. Brand deals and sponsorships ranked as the next most important revenue stream.

Creators who are not yet eligible for monetization on YouTube via the Partner Program, nevertheless reported that 16% of their revenue is derived from brand deals and sponsorships.

YouTube does not know the details of brand deals, live performances or other forms of off-platform revenue and takes none of this revenue. While musicians may use YouTube to build audiences, they tend to earn most of their income from other avenues such as recording

FIGURE 2.16: ELIGIBLE CANADIAN CREATORS' GROSS ANNUAL REVENUE

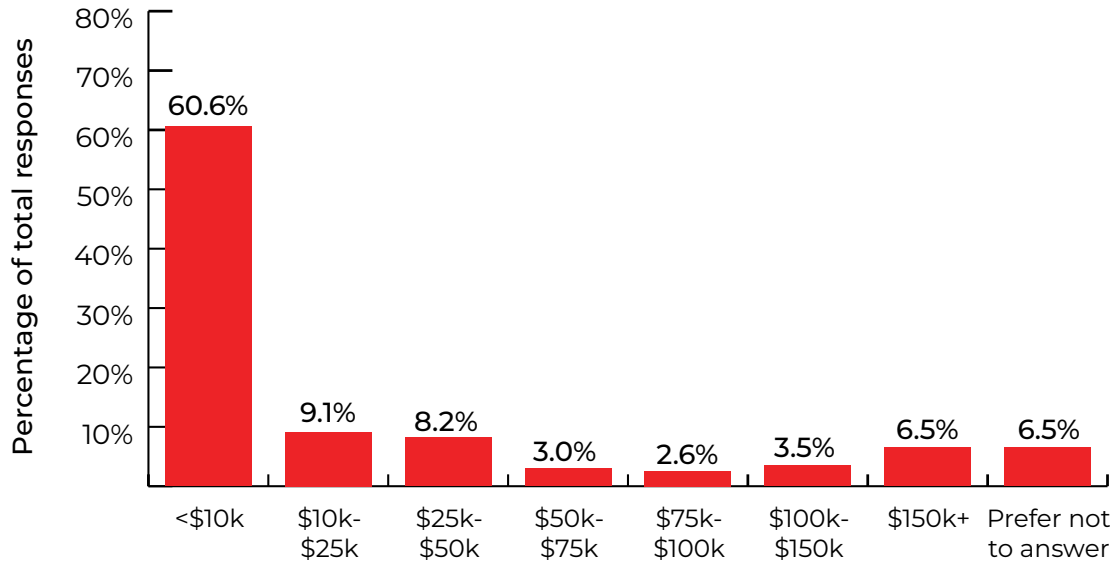
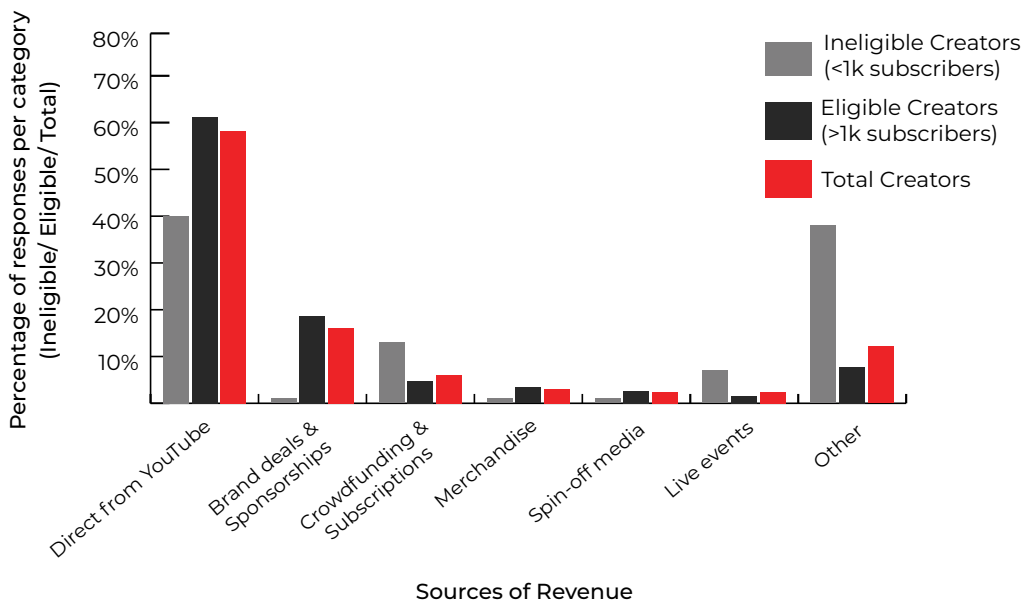


FIGURE 2.17: CANADIAN YOUTUBE CREATORS: SOURCES OF REVENUE



Note: Revenue includes direct revenue (e.g. AdSense, Channel Memberships, SuperChat, etc.) and indirect revenue (e.g. brand and sponsorship deals, Patreon, merchandise, live appearances, etc.)

IMPRESSIONS, VIEWS & WATCH TIME

On YouTube, the relationship between impressions, views, and watch time illustrates how audiences find and consume content, and how that content is monetized.

An impression is a measurement of how many times a video thumbnail has been seen by a user. Thumbnails, the small images that represent videos found on the front page of YouTube, are integral to attracting the audience.

Users who click on the thumbnail are measured using click-through rate, calculated as a percentage (i.e. 13% of impressions led to a click). Clicks turn into views, referring to the number of times a video was loaded. Content creators can mistakenly use this metric to measure video popularity. However, the amount of time a user spends watching a video is measured with average view duration, also calculated as a percentage (i.e. 61% of the video is actually being watched). Average view duration is able to account for users who skip forward, backward, or watch a video multiple times. In the YouTube Studio, this is visualized with the audience retention graph, so that content creators can reference this data to understand what captivates their audience.

Finally, watch time is a measurement of how much time users have actually spent viewing content. More watch time means more advertising has been displayed, leading to increased revenue for the content creator.

contracts, live performances, and sponsorships. Creative revenue-making appears to be the rule, not the exception, on YouTube across all genres. Figure 2.18 looks at the different types of spin off revenue.

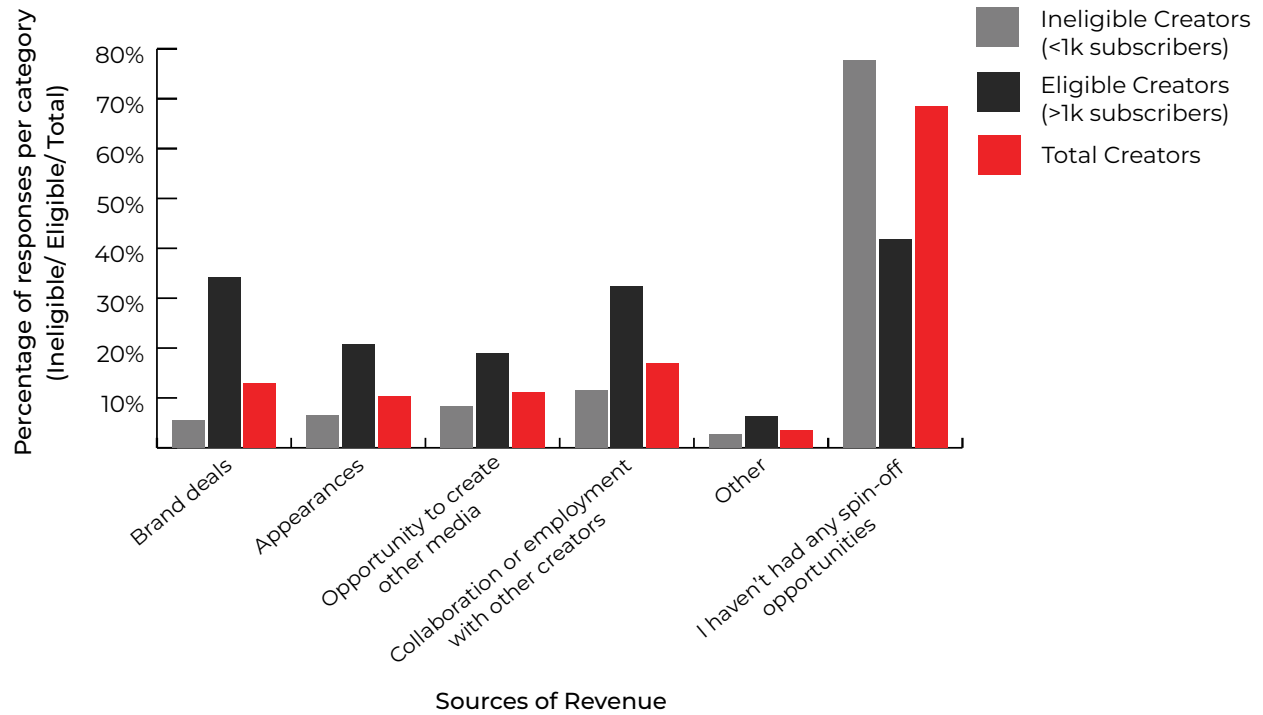
An example that came up during our creator chats includes a lifestyle channel with a modest number of subscribers. Although this channel only has 50,000 subscribers, it still attracts high-paying Canadian brand sponsors, and as a result can support a family. On the other hand, channels with ten times more subscriptions may not deliver a sufficient level of income if the right brands are not interested, or if the digital advertising rates are too low. The advertising rates in some parts of the world are a fraction of those in North America.

Brand deals can be sourced a number of different ways: (1) by the creator, (2) by a talent management company including a multi-channel-network (MCN), and (3) direct with the sponsor once deemed an influencer.

[The Sorry Girls](#) (194.3M views and 1.6M subscribers),

who make DIY tutorials, are sponsored by high profile brands that the creators explicitly promote on their videos.

Online value creation can translate to the real world, such as live appearances. For example, when Canadian creators Lilly Singh, Lauren Rhiimaki (LaurDIY), and other YouTube celebrities appeared at North America's first YouTube FanFest in 2015 at Yonge-Dundas Square in Toronto, the event attracted 15,000 fans, more than the three previous FanFests in Australia, China, and India. The event shut down the intersection, a main artery in Toronto's downtown core.⁹¹

FIGURE 2.18: CANADIAN YOUTUBE CREATORS: SPIN OFF REVENUE


VANOSSGAMING

10.8B VIEWS
24.4M SUBSCRIBERS

As of April 2019

Evan Fong of Richmond Hill, Ontario launched VanossGaming in 2011. The name “Vanoss” was inspired by the BMW VANOS valve timing system. The channel focuses on videos showing Fong playing popular video games such as Grand Theft Auto or Call of Duty with other YouTube collaborators. The videos capture the culture and community of gamers and their antics.

Fong graduated from Richmond Hill High School and studied economics at the University of Pennsylvania. He dropped out to focus on VanossGaming full-time. VanossGaming was named by Forbes in 2018 as one of the 50 most subscribed channels on YouTube. Fong's earnings in 2018 were \$17 million dollars, making Fong the world's 7th highest paid YouTube star.

Fong has a number of other notable accomplishments. He is creative director for the video game, Dead Realm; has voiced a YouTube Premium series, Paranormal Action Squad; and also produces music under another YouTube channel, Rynx which has 38.4M views and 338.5K subscribers.



HOW TO CAKE IT

461M VIEWS
4M SUBSCRIBERS

As of April 2019

How to Cake It was launched in 2015 by Yolanda Gampp, Connie Contardi and Jocelyn Mercer. The Woodbridge, Ontario based trio originally started out on cable television, but, after their show was cancelled, they moved to YouTube and started their own channel How to Cake It. Now the beautiful and surreal cake creations are being showcased on one of the most successful food channels on YouTube. In 2017, Gampp published How to Cake It: A Cakebook. The team has also created a line of baking tools, and they have launched a subscription-based “monthly sprinkle service” - where bright and cheerful edible sprinkles are delivered to subscribers.

SORRY GIRLS

195.1M VIEWS
1.7M SUBSCRIBERS

As of April 2019

Becky Wright and Kelsey MacDermaid met in University and launched The Sorry Girls in 2010. The name derived from the stereotype of Canadians being polite and frequent overusers of the word "sorry." The channel started out as a passion project to teach women how to DIY (do it yourself), for example, how to make a Halloween costume on a budget. Though their content has expanded, it still features videos showcasing creative furniture hacks or DIY-ing popular items.

The Sorry Girls have evolved into self-taught interior designers (though their backgrounds are in film and media production), with a channel that helps clients' reinvent their spaces. Some of their videos feature collaborations with other prominent YouTube creators, such as Adelaine Morin, whose home was redecorated by The Sorry Girls.

Wright and MacDermaid, both from Toronto, Ontario, pride themselves on being thrifty with their projects, often upcycling or repurposing existing items. Their unique DIY projects have allowed them to amass a large following, leading to many major brand deals.



“I don’t really make anything from YouTube itself, I would say like 98% of my income comes from my branded work based off of the tight-knit community I’ve created on YouTube.”

– Canadian YouTube creator

“For us, we don’t do any branded content and that’s mainly because we made the decision... so [our] revenue mix... it’s predominantly AdSense.”

– Canadian YouTube creator

“I didn’t even make rent money with AdSense I was lucky enough that I was able to partner with a lot of great brands”

– Canadian YouTube creator

CANADIAN YOUTUBE CREATORS HAVE DIFFERING OPINIONS ON VARIOUS MCNS

“I would choose to not partner with an MCN if I did it again. I regret that immensely. Get local help.”

– Canadian YouTube creator, when asked about one thing they would change about their experience as a YouTube creator

“I do a ton of brand work. I’m represented with [an MCN] and I partner with brands all the time and somehow in the past 3 years I’ve been able to build [my channel] up where I can have up to two heavily branded videos a month... and build a career out of it”

– Canadian YouTube creator, during an informal chat session

MULTI-CHANNEL NETWORK | MCN

MCNs or Multi-Channel Networks are a new business category built on the YouTube platform. MCNs offer business, marketing and cross-promotion support to YouTube creators in exchange for a percentage of ad revenue. A well known example is VEVO, an acronym for “Video Evolution,” an MCN that launched in 2009 by three major music labels (Universal Music Group/UMG; Sony Music Entertainment/SME; and Warner Music Group/WMG⁹²). Vancouver’s BroadbandTV is one of the largest MCNs in the world, accounting for hundreds of millions of unique viewers and billions of views across multiple platforms. Canadian media companies have also been investing in or establishing MCNs for the Canadian creator community. For example, Corus partnered with MCN KIN to launch Kin Community Canada.⁹³ Other examples include 9 Story Studios and Le Slingshot. Bell Media launched Much Digital Studios, purposed to align Much with its core audience and provide new brand opportunities for its creators. Quebecor established Goji Studios to give creators access to its reach and media expertise. Canadian broadcasters, producers, and legacy creators are increasingly partnering with YouTube to leverage the platform to reach new international audiences.

2.4.3: Potential wider benefits

There may be wider societal benefits to content creation work on YouTube. Whether product reviews, TED Talks, explainers or how-to’s, YouTube has been described as one of the rare “revolutionary”⁹⁴ technologies that increases access to knowledge. YouTube arguably contributes to economic productivity including innovation, employment, and export. YouTube facilitates not just individual creators, but any entity, including Canadian educational, government and corporate entities

CANADA EXPLORE

76.5M VIEWS

28K SUBSCRIBERS

As of April 2019

Canada Explore is the official YouTube channel of Tourism Canada. The channel's About page invites visitors to "explore our videos on experiences, destinations, and inspirational ideas for your next holiday. We'll show you the coolest locations, places and people to help you find the best things to do on your trip to Canada."

"Un assortiment de vidéos de voyage filmé à travers le Canada. Souscrivez à notre chaîne afin de recevoir régulièrement de nouvelles vidéos concernant les événements et les activités propres au Canada."

CANADA'S OTHER GOVERNMENT-OPERATED TOURISM **YOUTUBE** CHANNELS INCLUDE

TRAVEL MANITOBA
1.4M VIEWS | 2.7K SUBSCRIBERS

NEWFOUNDLAND & LABRADOR
7.8M VIEWS | 9.5K SUBSCRIBERS

SPECTACULARNWT
516.7K VIEWS | 6.9K SUBSCRIBERS

TOURISME QUEBEC
51.3M VIEWS | 6.9K SUBSCRIBERS

TRAVEL YUKON
3.6M VIEWS | 2.9K SUBSCRIBERS

NOVA SCOTIA
8.3M VIEWS | 5.3K SUBSCRIBERS

TOURISM PEI
4.7M VIEWS | 2.7K SUBSCRIBERS

TOURISM SASKATCHEWAN
967K VIEWS | 1.3K SUBSCRIBERS

NUNAVUT TOURISM
429K VIEWS | 1.5K SUBSCRIBERS

ONTARIO TRAVEL
31M VIEWS | 6.6K SUBSCRIBERS

to undertake free, frictionless video communication, not only with users in their identities as consumers but also as citizens, students, workers, parents, patients, and their many other roles.

For example, the Government of Canada and each province have official tourism YouTube channels, that as of April 2019, have attracted more than 461.3M views in Canada and around the world. This does not include municipal channels and countless non-governmental contributors to Canadian travel and tourism on YouTube.

Despite significant challenges to building a career on YouTube, the main story we heard from Canadian YouTube creators was the deep joy of working on the platform. Being your own boss, connecting with and inspiring communities in Canada and around the world, and converting these connections to revenue were all aspects highly valued by creators.

2.5 CANADIAN YOUTUBE CREATORS: AUDIENCES HERE AND EVERYWHERE

In September 2017, as part of [the Creative Canada Policy Framework](#), The Department of Canadian Heritage announced that increasing media exports would be a priority. This was followed up by Canada's first [Creative Export Strategy](#), purposed to "maximize the export potential of the creative industries."⁹⁵

The Creative Export Strategy program is slated to invest \$125M over 5 years across three pillars: (1) boost export funding in existing Canadian Heritage programs, (2) increase and strengthen the presence of Canadian creative industries abroad, and (3) create a new [creative export funding program](#) of \$7M per year purposed to build the relationships needed to make business deals.⁹⁶

Google⁹⁷ reports that Canadian YouTube creators are the #1 exporters on the platform. While the average

percentage of views outside the home country is 50%, the average for Canadian channels is 90%. Google further reports that in foreign markets, Canadian YouTube channels have seen a 45% growth of watch time over the past year. Watch time of Canadian content has grown 70% in the US, 50% in France, and 60% in Australia.

Our survey results show that YouTube functions as a free, instant, global export service for creative content. Our results also confirm that Canadian creators embrace this unique value proposition: frictionless access to the global stage.

What about Canada's domestic market? Figure 2.18 shows that, when asked to list their actual audience locations (data readily available to creators via YouTube Studio), Canadian creators rank Canada first as the audience that most of them are reaching, with the U.S., the U.K., and India ranked next (notably, large English-language markets). Next is France, followed by Australia and the Philippines.

Francophone Canadian YouTube creator [PL Cloutier](#) notes on his channel's "About" page that the province of Quebec represents 30% of the video views of its channel, with the remainder of views from France, Belgium, and Switzerland.

We also asked creators what audiences they would most like to reach. Figure 2.20 shows that more than 60% of Canadian YouTube creators hope to connect with audiences throughout the world.

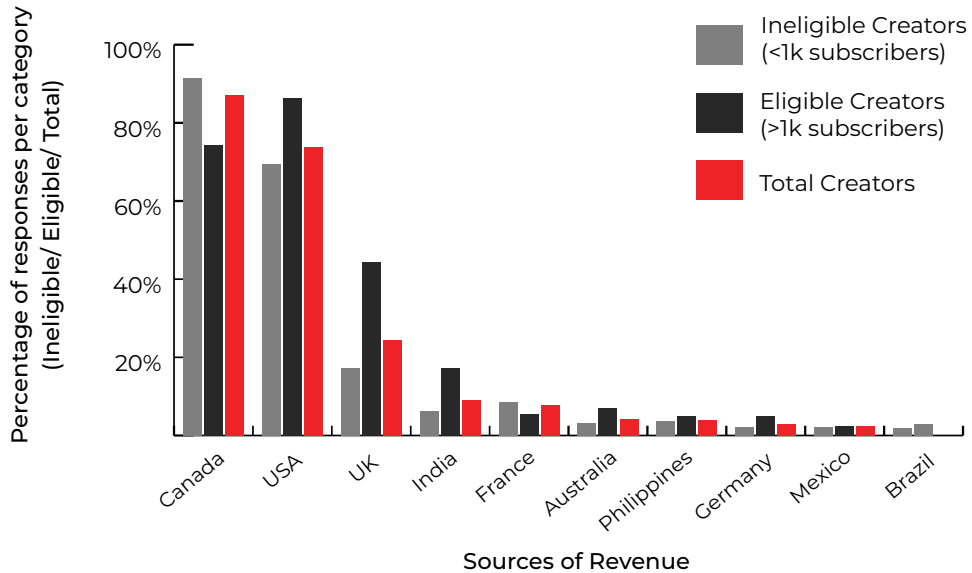
Canadian Creators value the access YouTube provides to global audiences. As Figure 2.21 shows, if promotion of content to domestic audiences were to reduce visibility to international audiences, 61% of eligible Canadian creators believe their channels would be impacted negatively.

Canadian YouTube creators are responding to audience demand. Figure 2.19 shows that they have reversed Canada's perceived disadvantage (a small domestic market bordering on the U.S.) and transformed it into a competitive advantage. It appears that Canadian YouTube creators are monetizing Canada's linguistic,

cultural, and geographic proximity to the U.S. The reason for this success is one factor: the need for audiences.

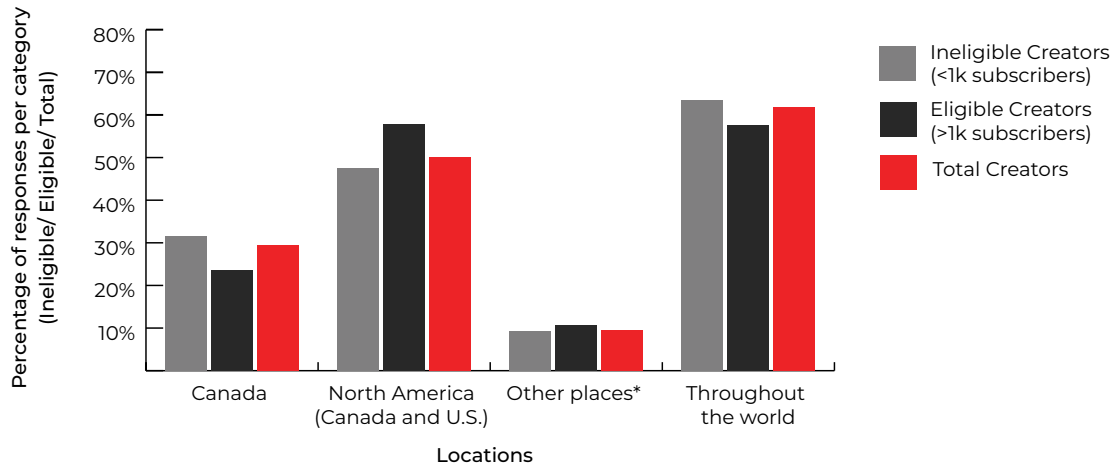
A unique service that the YouTube platform provides further enhances the ability of creators to build audiences in Canada and across the globe: audience analytics. All YouTube creators receive free access to a complete suite of detailed, live-updated transparent audience data on [YouTube Studio](#).

FIGURE 2.19: CANADIAN YOUTUBE CREATORS: LARGEST CURRENT AUDIENCES



Note: Data includes the top three countries listed where respondents' channels currently have the largest audience.

FIGURE 2.20: CANADIAN YOUTUBE CREATORS: LOCATIONS OF AUDIENCES THEY WANT TO REACH

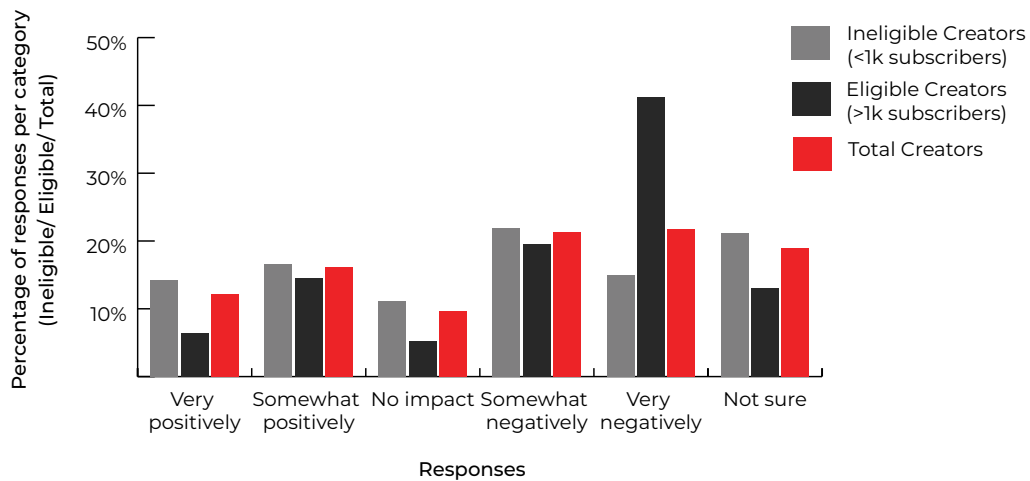


*Areas listed when respondents answered "Other places:"

Regions: Africa, Europe, Latin America, Caribbean

Countries: UK, Australia, Turkey, Taiwan, Syria, France, South Korea, Philippines, Pakistan, India, Nigeria, Morocco, Poland, Indonesia, India, Hong Kong, Europe, Germany, El Salvador, China, Belgium, Brazil, Bangladesh, New Zealand

FIGURE 2.21: CANADIAN YOUTUBE CREATORS RESPOND TO THE QUESTION: HOW WOULD YOUR CHANNEL BE AFFECTED IF YOUR VIDEOS WERE PROMOTED TO CANADIAN AUDIENCES BUT LESS VISIBLE TO INTERNATIONAL AUDIENCES



“I like being a creator even tho I’m a small one just to make people laugh smile and just feel happy and I’ve made friends from being a creator I really hope this year I will be a better creator and my channel would grow so I can make even more people smile.”

– Canadian YouTube creator on what they value most about being a YouTube creator

“I value the ability to be myself and connect with others that share the same interests as me. It’s quite amazing to see how many people li make happy. Considering that I make my own music, it feels great to know that people really like it!”

– Canadian YouTube creator on what they value most about being a YouTube creator

2.6 CANADIAN YOUTUBE CREATORS: EXCELLING IN ALL GENRES, ESPECIALLY LEARNING

Genres on YouTube are a three-part story: official genres, quirky genres, and learning.

2.6.1: Official genres

Canada boasts best in class YouTube creators in every one of the YouTube official genres. As described earlier

in this chapter, Canadian creators excel in Lifestyle (including health and beauty, fitness, nutrition, parenting and travel), Gaming, Entertainment (including comedy and sports), Music, and content for audiences under 18.

2.6.2: Quirky genres

Hilarious cat videos aside, content genres native to YouTube have expanded to the unimaginable outskirts of quirky entertainment. They include knitting videos (“more than ¾ billion hours watched in 2016⁹⁸) and booktubers, such as Canadian [Hailey Leblanc’s Bookland](#) (est. Jan 29, 2014, 20.3M views, 218.1K subscribers) from Windsor, Ontario. There are candle scent reviews and flash mobs. There are hundreds of channels, from numerous countries, devoted to elevator videos.⁹⁹

CANADIAN YOUTUBE CREATORS ON WHAT THEY VALUE MOST ABOUT BEING A YOUTUBE CREATOR

Beaucoup de gens regardent mes vidéos partout dans le monde. C'est cool de savoir que quelqu'un en Australie (par ex) regarde ma vidéo.

– Canadian YouTube creator

It provides me with an audience that I would not otherwise have access to.

– Canadian YouTube creator

Being able to reach a global scale audience and receiving such positive feedback is incredible. People telling me I helped them all around the world is amazing.

– Canadian YouTube creator

Canadian channel, [Eddie ASMR](#) (1.7M views and 16.3K subscribers), which was launched in 2017, uploads videos in the Autonomous Sensory Meridian Response (ASMR) genre, meaning that creators speak in hushed tones, attempting to induce a tingling sensation that is not sexual, but a relaxation response that can supposedly help induce sleep. Eddie sometimes combines soft talk with eating food including the sounds of fast-food paper bags and crunchy chicken.

In a spirit kindred to the YouTube music remix, quirky native genres are themselves freely combined. For example, Canadian beauty blogger, [PiinkSparkles](#) (240M views and 1.2M subscribers) combines beauty with mukbang, videos of people eating enormous amounts of food.

Such niches, and many more, are being turned into substantial audiences that are monetized on YouTube.

2.6.3: Learning is a big story

A big story emerged when we asked Canadian creators about their purpose on YouTube. For eligible creators, (per Figure 2.22) building an audience and earning money were reported, understandably, as their main purpose on YouTube. Educating audiences was next, with half the eligible creators focused on this purpose.

In Figure 2.23 we observed a general trend showing that eligible creators tend to focus on educating and informing their audiences as their subscriber numbers increase up to one million subscribers.

CANADIAN YOUTUBE CREATORS VALUE AND SERVE THEIR AUDIENCES/ COMMUNITY

“Being able to connect to a community. Coming home to positive comments is what makes being a content creator worth it. Being part of a community is something that is so valuable and amazing.”

– Canadian YouTube creator on what they value most about being a YouTube creator

“The community space I have built around my channel. The regulars that stop by for the live streams and comment and interact with each other. The fact that my content has brought these people together.”

– Canadian YouTube creator on what they value most about being a YouTube creator

“What I value most about being a YouTube Creator are the rights of individuals. My audience and subscribers are my priority.”

– Canadian YouTube creator on what they value most about being a YouTube creator

“I value the ability to work hard creating material that is meaningful to me and see the reaction to that work through my audience. Working hard on a small detail in a video is made so much more worthwhile when the audience picks up on it and rewards you.”

– Canadian YouTube creator on what they value most about being a YouTube creator

I get to create videos, which appeal to a VERY SMALL audience, and that’s ok. I don’t have to have mass appeal. [My] videos are about geometry and definitely not mainstream... I’ve got to figure out how to add cats :)

– Canadian YouTube creator on what they value most about being a YouTube creator

WHAT CANADIAN YOUTUBE CREATORS VALUE MOST ABOUT BEING A YOUTUBE CREATOR

“It gives me an opportunity to express myself and educate others.”

– Canadian YouTube creator

“I like helping people learn English. I feel like sometimes the world seems messed up and I like having a creative outlet (teaching English on YouTube) where I feel like I’m making the world a better place instead of making it worse.”

– Canadian YouTube creator

In summary, we observed a possible shortcoming in YouTube’s official category list; the categories do not accurately reflect the totality of “informing” or “learning” happening in the YouTube ecosystem across every official genre. Nearly every category, including Music, Gaming, Entertainment, Lifestyle and How-to/DIY involves teaching, explaining, inspiring, and/or motivating audiences. Whether watching archived concert

“I have just recently started making [content]... but I love that YouTube has tons of [videos] to help me out, on how to have popular content. I love that I can make [videos] that I want to do, and hopefully make people satisfied with my content.”

– Canadian YouTube creator on what they value most about being a YouTube creator

performances to improve one’s musicianship, learning how to tune a banjo, playing a video game, applying make-up, telling a joke, fixing a dishwasher, deciding what product to buy, or where to travel -- creating on YouTube seems, to us, quintessentially about teaching and inspiring audiences. (Moreover, as will be explored in Chapter 3, YouTube *is* the first place more than 70% of YouTube consumers go for one purpose: to learn).

In sharing this observation with YouTube, we discovered that this remarkable story around learning has recently been observed by YouTube itself. In 2018, YouTube launched a set of initiatives, including [expanding its Learning team](#) and a \$20M fund for creators devoted to strengthening the unique role in learning that YouTube appears to play, not only in Canada, but in the global media ecosystem.

YouTube’s head of trends, Kevin Allocca has called the “how-to” or explainer genre “the most tangible manifestation of human curiosity ever recorded... Every day literally millions of YouTube searches contain the phrase “how to”... among the most popular: “how to kiss,” “how to make slime,” “how to solve a rubik’s cube,” “how to make ice cream,” “how to lose weight,” and, “how to curl your hair with a straightener.”¹⁰³

COMMON RESPONSES FROM CANADIAN YOUTUBE CREATORS WHEN ASKED “WHAT IS ONE THING YOU WOULD CHANGE ABOUT YOUR EXPERIENCE AS A YOUTUBE CREATOR?”

“I would have liked to get started sooner.”

– Canadian YouTube creator

“J’aurais commencé plus tôt.”

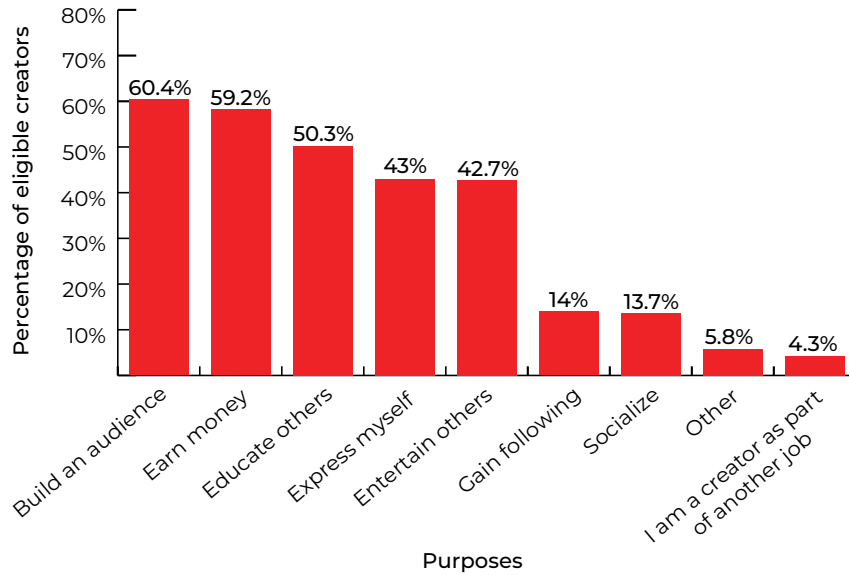
– Canadian YouTube creator

“I wish I would have started filming and uploaded videos so much earlier and not waited for so long to build up the confidence.”

– Canadian YouTube creator

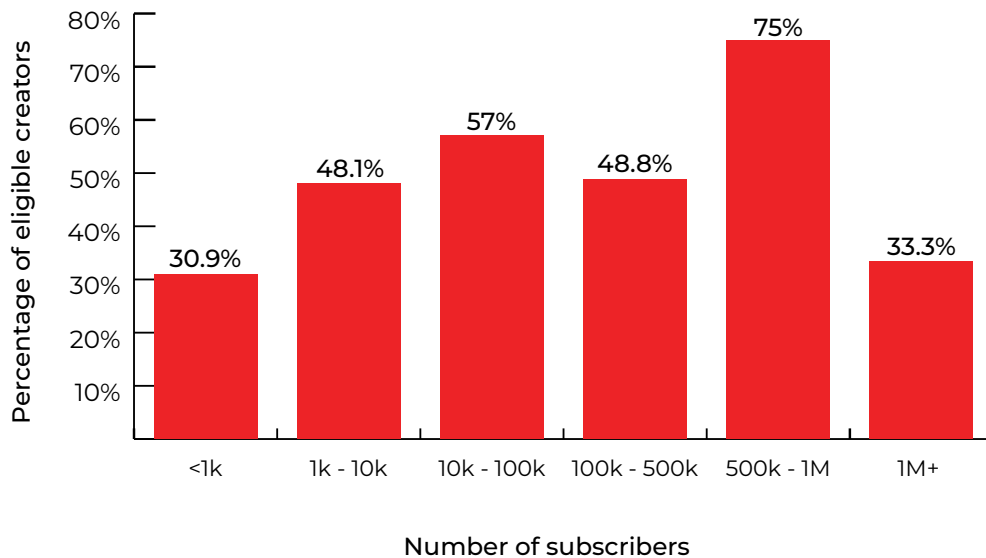
It should be noted that over 12% of responses to the question “What is one thing you would change about your experience as a YouTube creator” were: “Nothing!” or “Rien!”

FIGURE 2.22: ELIGIBLE CANADIAN YOUTUBE CREATORS: PURPOSES



Note: Eligible creators have over 1000 subscribers per channel

FIGURE 2.23: ELIGIBLE CANADIAN YOUTUBE CREATORS: PERCENT WHOSE MOTIVATION IS TO EDUCATE AND INFORM





No report on YouTube would be complete without a nod to the funny cat videos that were quintessential to its early brand identification. When asked to name a popular use of the Internet that he would have never predicted, Tim Berners-Lee, creator of the World Wide Web, answered simply: "Kittens." The cat video trend may have been initiated by one of the YouTube founders, Steve Chen, whose video "[Pyjamas and Nick Drake](#)," was uploaded on May 22, 2005 (67K views).

One explanation of the persistent popularity of cat videos is connected to their faces. Similar to human babies, cats have a deadpan expression that can be difficult to read.¹⁰⁰ Another explanation is that cats, also like human beings, are "just one tiny slip away from total humiliation."¹⁰¹ Perhaps the best explanation of cat videos strikes close to the YouTube DNA of pleasure: people are happier after watching cat videos.¹⁰²

UNBOX THERAPY

2.8B VIEWS

14.2M SUBSCRIBERS

As of April 2019

Lewis George Hilsenteger is a Newmarket based Canadian YouTube producer, host and technology reviewer who is known for his channel Unbox Therapy - the most subscribed technology channel on YouTube. The logline, "where products get naked," refers to Hilsenteger unboxing tech - the bulk of the channel's content. Hilsenteger launched the channel in 2010 while working at a computer repair shop. He quickly realized that his customers' questions could be best answered with videos. He began to purchase new devices and would film himself opining about the products. His idea paid off. Hilsenteger now opens boxes of cool tech for a living. Hilsenteger attended the Toronto School of Art where he studied digital arts, photography and video editing.

ICING ARTIST

693M VIEWS
3.3M SUBSCRIBERS

As of April 2019

Laurie Shannon, The Icing Artist, from Oshawa Ontario, launched her cake artistry channel in 2013 while working at a bakery. She reinvents cakes, pokes fun at trends, and teaches the easy way to make WOW-worthy desserts with just a few tools and ingredients that even non-bakers can manage. Shannon discovered that there was a market for cake decorating videos in different parts of the world., She had her channel transcribed in various languages and her subscribers leaped from 30,000 to 1 million. This success shot Shannon into the spotlight. She appeared on Live with Kelly and Ryan Seacrest in 2019. As the channel grew, Shannon and her husband both quit their day jobs to devote their full time to their YouTube channel The Icing Artist.

PETER MCKINNON



221M VIEWS
3.6M SUBSCRIBERS

As of April 2019

Peter McKinnon is a Canadian YouTube creator from Toronto, Ontario. He is an acclaimed photographer and videographer best known for his YouTube tutorials. McKinnon got his start when his sister gave him a camera as a gift for being a part of her wedding party. Since then McKinnon's success as photographer and videographer has been unstoppable. His channel shares creative and technical advice and knowledge while inspiring others to pursue their passions.

One of McKinnon's best-known works includes, "The Plaid Chair Series," which received significant media attention in 2009 which helped launch his career. McKinnon has been featured in publications including Magic Magazine and Popular Photography.

McKinnon is nominated for "Breakout YouTuber of the Year" for the eleventh annual Shorty Awards, an award ceremony that recognizes influential content creators on the Internet.

YOUTUBE STUDIO

YouTube Studio is considered the back end platform for YouTube for creators. It is a quantitative resource, provided at no cost by YouTube to all creators, to help manage and upload videos, review analytics, and

interact with audiences. The platform dashboard can be divided into three key areas: videos, analytics, and comments.

COMMENTS

The comments section centralizes all audience feedback. Creators can individually respond to viewer comments, and moderate any offensive content that may have been flagged.

VIDEOS

The videos section enables creators to review and organize all of their uploads. Functions include deleting and renaming content, adding videos to playlists, and adding closed captioning, amongst a number of other features.

ANALYTICS

The analytics section may be the Studio's most powerful tool. Creators are able to access an extensive amount of data pertaining to the demographics and viewing habits of their audience. They can also examine where advertising revenue is being generated, and how they can adapt their content to maximize profit. Many of these metrics can be analyzed geographically (i.e. content creators can determine that 13% of their video revenue came from Canadian viewers). Available analytics include:

Revenue

Provides information about which content is generating the most ad revenue. It can also provide daily analytics for ad revenue on a specific video.

Advertising Rates

Shows the average (CPM), or the estimated average revenue per thousand ad impressions. It also shows the number of monetized playbacks, geographical sources of revenue, and other critical features.

Audience Retention

Details the percentage of viewers who are watching at each second of the video. This is an extremely valuable metric, as it allows content creators to develop, curate and tailor their videos to appeal to their audience.

Traffic Sources

Provides data on how viewers are accessing content for example, by online searches, recommendations from another video, or from an external website, etc.

Devices

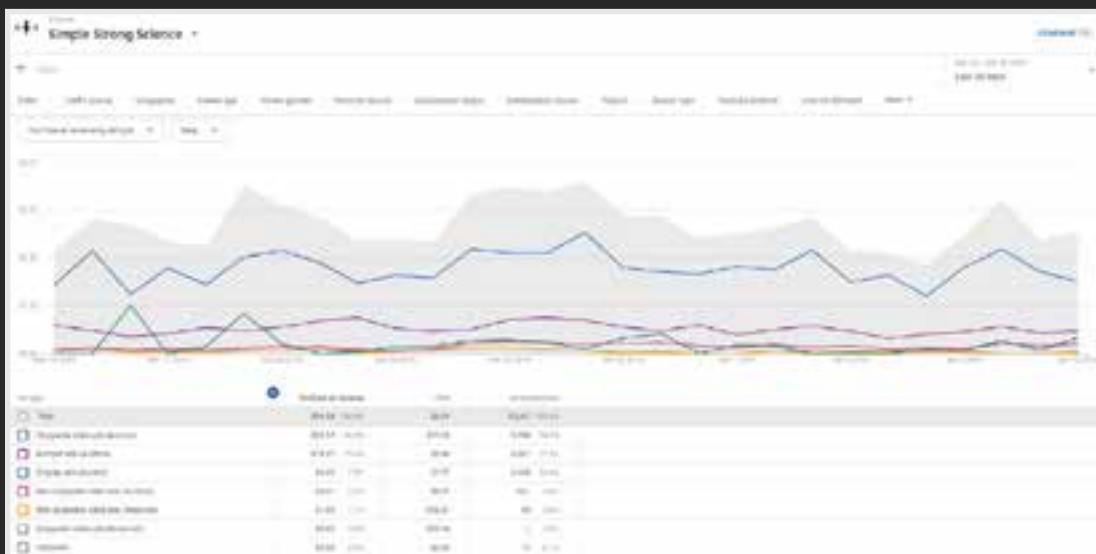
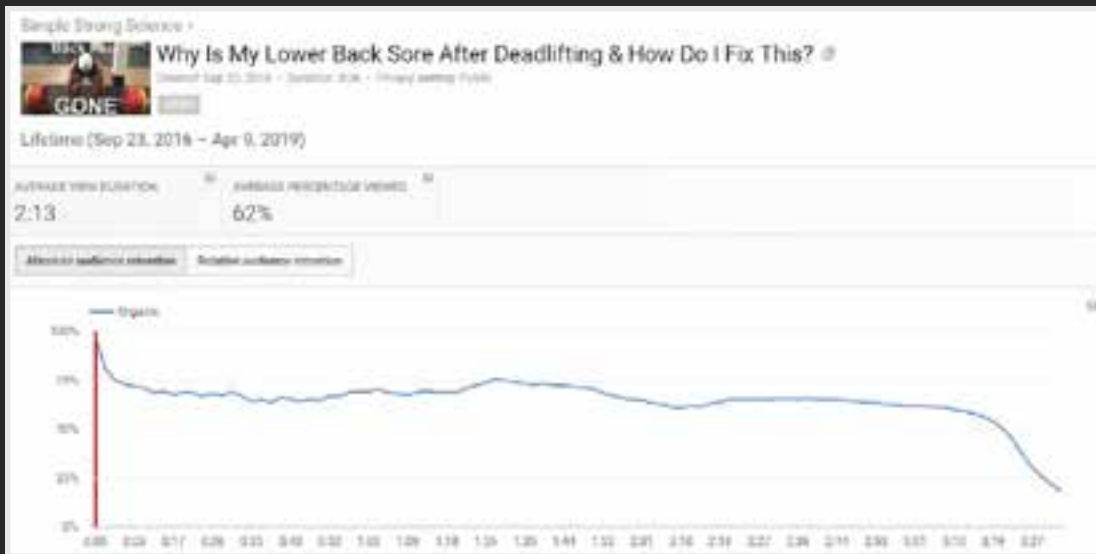
Provides information about how and on what devices audiences are viewing content such as, phone, tablet, desktop, etc.

Demographics and Watch Time

Provides information about the age, gender, and geography of the audience, as well as how many minutes have actually been spent watching videos.



YouTube Dashboard Analytics





ASAP SCIENCE

1.2 B VIEWS

8.6M SUBSCRIBERS

As of April 2019

Gregory Brown and Mitchell Moffit became friends as biology undergrads at the University of Guelph in Ontario, where their enthusiasm for science and their engaging personalities led them to become known as “the science guys.” In 2012, they launched their learning channel AsapSCIENCE with the log line, “your weekly dose of fun and interesting science.” By the close of the channel’s first year, 28 videos had a million views. Brown and Moffit asked friends, viewers, and even Brown’s Mom to ask questions; their strategy led to big success with videos such as “The Scientific Hangover Cure” (27M views); “The Scientific Power of Naps” (3M views), and “What if you stopped going outside?” (7.2M views). AsapSCIENCE is one of YouTube’s most popular learning channels and also often addresses issues affecting the gay community.

CARL IS COOKING

40.8M VIEWS | 399K SUBSCRIBERS

As of April 2019

Carl is a Québec native and French culinary reality star of the television show *Le Meilleur Pâtissier*. Carl launched the French language YouTube channel, *Carl is Cooking* in 2014; where he combines cooking, baking and DIY challenges, but departs from traditional cooking and recipes to develop playful, unique and innovative creations. Carl shows his audience that food is so much more than just what we eat - food can be a form of wizardry. In the world of food styling, *Carl is Cooking* shows audiences how motor oil can act as a perfect visual substitute for maple syrup and how white craft glue can be a successful stand-in for milk.

EDGY VEG

16.8M VIEWS | 328K SUBSCRIBERS

As of April 2019

The *Edgy Veg* launched in 2012 by Candice Hutchings - a vegan food innovator and creator who specializes in veganizing comfort foods that is delectable to both vegans and non-vegans alike. In 2015, Hutchings left her job in advertising to work full time on her YouTube channel along with her partner James Aita. The Toronto-based couple is dedicated to revolutionizing vegan food. Hutchings and Aita have other successes including the 2017 book, *The Edgy Veg: 138 Carnivore Approved Recipes*.

YOUTUBE SPACE TORONTO

YouTube Space Toronto launched in 2016 in the Film and Design School at George Brown College. It is the newest of ten global YouTube Spaces (the other locations are in Berlin, Dubai, London, Los Angeles, Mumbai, New York, Paris, Rio de Janeiro and Tokyo). YouTube Space Toronto (the Space) includes two production studios with live stream, VR and 360 production capabilities, a professional loft kitchen set with overhead cameras, and a full set of the latest production gear. The Space has evolved into an active hub where Canadian creators can network, connect, and even hold special events. The Space employs six full-time staff and is 95% booked six weeks in advance. More than 800 channels have passed through the "Unlock the Space" orientation program. Booking the Space, including studios, production gear and support staff, is available to creators free of charge if a channel has at least 10,000 subscribers. A comparable booking would be valued at \$10,000 - \$12,000 per day in another studio. Access to the Space is tiered. Creators with 10,000 - 100,000 subscribers can book the space once per month; channels with 100,000 - 1 million subscribers can book the space up to three times a month; and, if a channel has more than 1 million subscribers, they can book the Space up to six times a month. Mark Swierszcz, who heads YouTube Space Toronto, believes that there is a "sweet spot" for creators. When channels gain 60,000 - 80,000 subscribers, creators start taking YouTube seriously and contemplate quitting their day jobs.

One of the greatest needs identified in the Toronto market was determined to be community building. Swierszcz designed a series of happy hours to encourage networking, which has successfully led to collaborations between creators, brands and managers, which are considered the best ways to grow a channel. This strategy has led to cross-channel collaborations including Lilly Singh, Gigi Gorgeous, Pete Mckinnon, Chris Ramsay and many more.

CREATOR ACADEMY

Creator Academy is a qualitative resource maintained by YouTube that helps creators learn how to grow their channel, earn revenue, and get closer to the community of YouTube creators. Creator Academy includes a website and a YouTube channel that had over 900,000 subscribers as of February 2019. Free courses in nine categories simplify nearly every facet of YouTube: audience, building a business, content, discovery and watch time, getting started, making money, marketing and promotion, production, YouTube features, and analytics. For example, YouTube Features and Analytics explores not just how the tools can be used, but also why content creators should be using them. Each course is followed by a multiple-choice exam. Users who pass the exam are awarded a certificate.

YouTube has also addressed the issue of time-management and creator burn-out. We heard that the demands of the platform can seem overwhelming, especially to new creators whose audiences are spiking for the first time.

As part of Creator Academy, a presentation called the "10 Fundamentals Bootcamp" divides YouTube strategies into three buckets of challenges: "Get viewers. Keep viewers happy. Keep yourself happy." These straightforward categories click through to increasing granularity. For example, while "Get viewers" begins with the line "Attracting those initial viewers is the foundation of success on YouTube," it leans into five key concepts: "Targeting, Discoverability, Accessibility, Collaboration and Shareability," each with detailed, accessible discussions and videos.

Think with Google also publishes articles on YouTube assistance, including a strategic approach to manage the demands of the platform: the Hero - Hub - Help, paradigm (see Figure 2.25). As explained in the article, hero content includes the intermittent larger videos that take longer to produce, but only a few times per year. Hub content is the regularly uploaded, informal content that YouTube explains should be "designed to give your audience a fresh perspective" and a "reason to visit your channel." Finally, help content is ongoing, direct interaction with audiences, such as responding to comments and direct requests.

2.7 CANADIAN YOUTUBE CREATORS: BUILDING COMPETENCIES

Barriers to entry as a YouTube content creator are extremely low. Nevertheless, integration of a wide range of skill sets is essential to build a YouTube channel into sustainable employment. Given that successful channels are also YouTube's priority, and given its shared revenue business model, the platform has built

services and initiatives to educate YouTube creators and build competencies across a spectrum of needs including production (e.g. YouTube Space Toronto); channel building (e.g. Creator Academy), and audience analytics (YouTube Studio), as previously described.

Figure 2.24 indicates that Canadian YouTube creators are building competencies on the platform. For each period of time as a Creator on YouTube (less than a year, 1-2 years, 3-5 years, and over 5 years), the percent of eligible creators increases, while the percentage of ineligible Canadian creators decreases. The longer a creator is on YouTube, the greater the likelihood that they are eligible for monetization, or rather the greater the likelihood of having a larger subscriber base.

FIGURE 2.24: CANADIAN YOUTUBE CREATORS: BUILDING SUBSCRIBERS

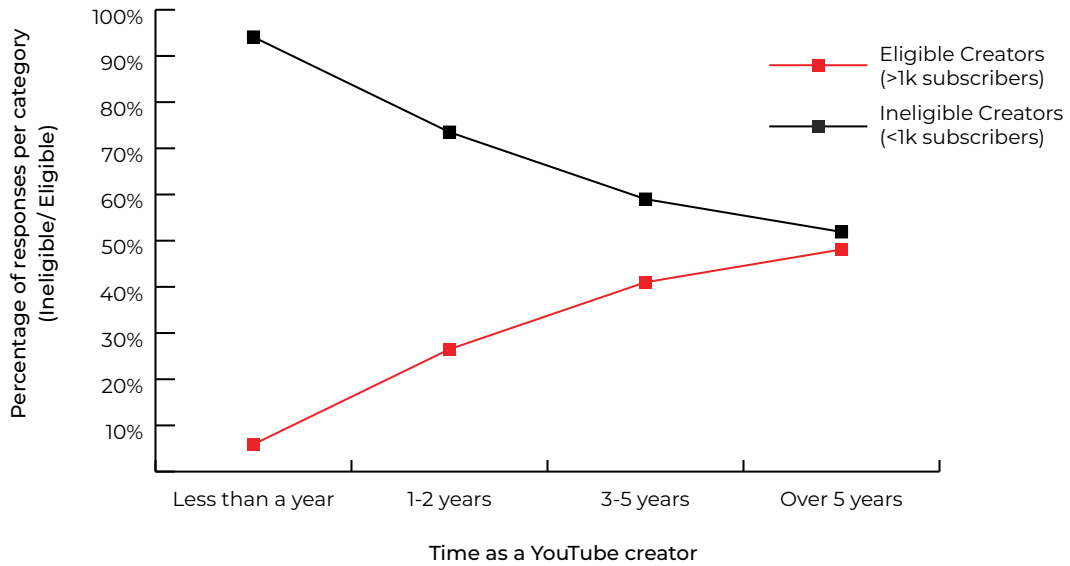
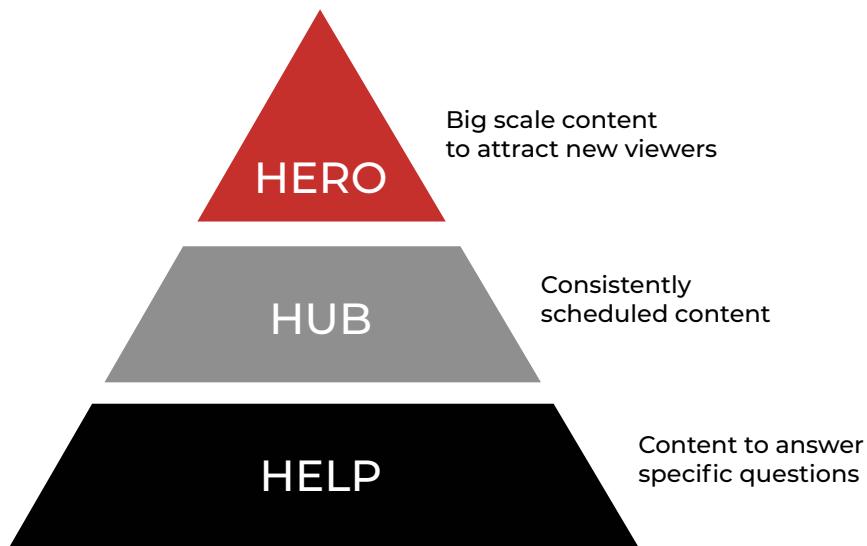


FIGURE 2.25: HERO HUB HELP



2.8 CANADIAN YOUTUBE CREATORS: PATHWAYS TO AND FROM LEGACY MEDIA

Legacy media has found a home on YouTube in genres including, music, hit TV, reality and unscripted TV series, scripted web series, family and children's content, and news and information. YouTube has opened new pathways to and from legacy media for YouTube and legacy content creators, both ways adding value to Canada's media ecosystem.

2.8.1: Music

YouTube changed the way that global audiences consume music, and it has also changed the way that music artists interact with audiences. [Wikipedia's chart of top videos](#) since 2005 indicates that YouTube has functioned as a global music distributor and remains a key platform for watching music videos. As will be seen in the next chapter, music distribution is being disrupted (yet again), this time by streaming services.

The idea of a kid reaching out to the world from their bedroom and not only having the potential to be heard, but to actually be heard and then lifted up to become a global music sensation, is a powerful YouTube narrative that has been true for numerous Canadian music artists, perhaps most famously Justin Bieber, Carly Rae Jepsen and Shawn Mendes. While Bieber and Mendes are profiled separately in this report, here are a few more Canadian music stars who started their careers on YouTube:

- **Carly Rae Jepsen** was only known in Canada until a video by Justin Bieber, Selena Gomez lip syncing Jepsen's song "[Call Me Maybe](#)" went viral in February 2012.¹⁰⁴ Bieber's manager became Jepsen's and the song became a massive hit. Its music video reached a billion views by 2017 and became number one on the Billboard Hot 100.

- **Alessia Cara**, from Brampton, Ontario, who won the 2018 Grammy for Best New Artist, started by posting acoustic covers of her favourite songs on her YouTube channel.
- **Johnny Orlando**, a 16 year old singer from Mississauga, Ontario, first got attention by posting covers on YouTube. In 2018, Orlando signed with Universal Music Canada and performed with Carly Rae Jepsen. In 2019 Orlando released his debut album and on April 29, embarked on his first North American tour.¹⁰⁵
- **Jessie Reyez**, 27 year old Colombian-Canadian singer was YouTube's first Artist on the Rise¹⁰⁶ after her breakout hit, "Figures" got 22.6M views. YouTube contributed in-product promotion and programming, out-of-home, social and fan events at YouTube Spaces to build her global exposure.

Canadian musicians who have not gotten their start on YouTube also have a commanding presence on the platform. For example, [Drake](#) the global rap sensation from Toronto who got his start on the Canadian TV series *DeGrassi High* and frequently references Toronto in his music, has more than 6B views (April 2019). Drake's "God's Plan" was 2018's eighth most watched music video on YouTube. Another 2018 song, "[In My Feelings](#)" inspired massive fan participation on YouTube with the #InMyFeelings dance challenge. The compilation video has received more than 2.9M views (April 2019), while the top individual video about Drake's song, by Will Smith, received more than 17M views.

There is also genre of music unique to YouTube. The platform is the epicentre of viral hits from homemade videos or remixes that achieve success with iterations including covers, lip-synching and/or dance challenges. Such music content innovations bring new artists and songs into the ecosystem.

A potent Canadian example is the cover by the band, Walk Off the Earth -- of Australian singer's Gotye's 2012 song, "[Somebody That I Used to Know](#)" -- that became YouTube's number two trending video and featured the entire band on one guitar. It enhanced the success of the original song but also kick started the career of the

Canadian band. As of April 2019, Walk Off the Earth's cover has been viewed 186M times; [Gotye's original](#) has been viewed 1.2B times.

2.8.2: Legacy TV

Numerous pathways from legacy media to YouTube appear to benefit legacy media in terms of advertising and reach. YouTube Canada helps Canadian live events expand audience reach internationally, such as the live-stream of the final Tragically Hip concert; the Juno Awards, the Canadian Screen Awards, APTN's Indigenous Day Live, MTV's VMA's (Video Music Awards), and the CCMA's (Canadian Country Music Awards).

YouTube also provides Canadian creators with pathways to legacy media. Lilly Singh, a Canadian who has proven her success with global audiences on YouTube, and who was announced, in March 2019, as the next host of a late night legacy TV program [A Little Late with Lilly Singh on NBC](#). Many Canadian YouTube creators have book deals, including channels such as How To Cake It, Epic Meal Time, and Matty Matheson.

YouTube also extends the value of late night TV with clips from network shows such as *The Late Show With Stephen Colbert*, *Late Night with Seth Meyers*, *Last Week Tonight with John Oliver*, *The Tonight Show With Jimmy Fallon*, *Real Time with Bill Maher*, and *Saturday Night Live*, famously created by Canadian Lorne Michaels and going strong in its 44th season. YouTube has become a destination for late night viewing. These kinds of clips can attract between one and three million viewers. Arguably, late night comedy shows have adapted their formats to optimize for YouTube, for example SNL digital shorts, James Corden's "Carpool Karaoke" or Jimmy Fallon's "Lipsync Battle" features.

YouTube reports they have partnered with legacy broadcasters including Corus/Nelvana, Quebecor, TVO, TFO, and Pelmorex; producers such as Temple Street/Boat Rocker, 9 Story, and Apartment 11; and digital publishers such as Just for Laughs and Dibly to help extend their global reach. Partnering with Cirque du Soleil, YouTube contributed VR Funding and a Content

Lab that included training, mentorship, VR equipment, and production funding.

2.8.3: Reality/unscripted TV

Similarly to late night entertainment, global "reality" hits such as *Keeping Up with the Kardashians*, *Jersey Shore*, and *Dance Moms*, for which Canadian distribution rights are held by Canadian broadcasters, are featured as clips on the Canadian broadcaster's YouTube channels, deploying YouTube as a distribution vehicle to increase revenue from Canadian audiences and entice viewers to watch full episodes on linear TV.

Clips of Canadian reality shows that are based on international formats are also on YouTube. For example, clips from the Canadian *Bachelor* are on [Bachelor World](#).

Another pathway from legacy media to additional monetization on YouTube by Canadian networks is exemplified by CTV, which uploaded full episodes of their 2018 six-part mini-series, [The Launch](#).

However, a key story around unscripted series is their overall migration from specialty TV to YouTube creating some competition between legacy creators and native YouTube creators.

A compelling example is [The Food Network channel](#), which launched in 2006 and as of April 2019 had 119M views and 622K subscribers; compared to YouTube's top cooking show, [Tasty](#) that launched in 2016 and as of April 2019 had 2.6B views and 14M subscribers. Tasty is mobile friendly, with sped-up food preparation videos, contemporary music and easy-to-find recipes.

Canadian creators have had significant creative and financial success in this arena, particularly in cooking and travel. Their success on YouTube further corroborates the value of a platform that enhances productivity by offering a creator-driven timeline and instant access to national and global audiences, as well as production, channel building, and audience analytics support.

Among Canada's many successful food channels is [Epic Meal Time](#) (1B views as of April 2019 and 71M

subscriptions) that launched in 2010 with a special blend of comedy and extreme food starring Montreal native Harley Morenstein creating massive, high-calorie spectacles. Some popular videos have been 2011's "Fast Food Lasagna" and the "Sloppy Roethlisburger," the creation of a 138,226 calorie burger (31M views and 11M views as of April 2019, respectively). In 2018, Epic Meal Time launched a brand called Super Snack Time being sold in Walmart and including products featuring their favourite flavours, such as "Bacon in a Bottle," and "Pizza in a Bag."

Canadian chefs have leveraged YouTube to move to other media. Matty Matheson was a professional chef until his popularity as a humorous personality on his YouTube show, *Keep It Canada*, transformed him into a television host with two shows on the Viceland TV network, *Dead Set on Life* and *It's Suppertime*. Matheson's book, [A Cookbook](#) received a mention in the [New York Times review of the best cookbooks of Fall 2018](#).

2.8.4: Web series

As YouTube took off there was a perceived opportunity for short scripted content, known as web series. Web series have not fulfilled these hopes. In a contradiction known as the "participatory culture paradox,"¹⁰⁷ online distribution enabled creators to globally distribute, but has not led to web series being discovered by audiences or therefore, to a viable business model.

There seem to be disadvantages for web series on YouTube. For creators they carry over the barriers of time and expense of legacy scripted content. The web series genre may not meet the viewing expectations of YouTube audiences. A Canadian web series creator suspects the root cause for the failure of web series to attract audiences may be deeper: "The formats that are valued are longer... the half-hour or one-hour... I'm starting to think this idea of sitting down and investing emotionally in characters and a story 10 minutes long is not how humans function."¹⁰⁸

There are exceptions to this rule such as the Canadian channel [KindaTV](#) (130M views and 266K subscribers).

Launched in 2013, the channel is home to *Carmilla*, an LGBTQ vampire web series which boasts its "108 episodes, 3 seasons, and one worldwide fandom" as well as a feature film, for which the trailer on got 485K views on YouTube.

2.8.5: Children and youth

On YouTube, Canada's strong global brand in the creation of content for audiences under 18 is thriving.¹⁰⁹ A channel by Skyship Entertainment, a Toronto based, Canadian company, [Super Simple Songs](#) (13B views and 14.4M subscribers as of April 2019), launched in 2006, is one of the platform's top sites.

Other established Canadian producers of family and children's content, such as DHX and Corus/Nelvana, have also adapted to global opportunities that YouTube provides.

2.8.6: News and information

While our consumer study (in the next chapter) suggests that YouTube is not the first place that Canadians go to for news, there are important Canadian news and information creators on YouTube, including CBC News and more native to the digital era, Vice.

CITIZEN JOURNALISM

Amateur videos of live events by ordinary citizens, now known as citizen journalism, bystander video or witness footage, were original to YouTube and today are an expected complement to established news network footage.

A compelling case study is the Toronto van attack of April 2018. A van was intentionally driven into a crowd of pedestrians near Yonge Street and Finch Avenue in Toronto. The driver killed ten people and injured sixteen others. While some people at the scene of the incident helped the victims, others caught the rampage on camera. CTV's [clip featuring witness footage](#) had 217K views as of April 2019. A YouTube search of the attack reveals that the use of clips posted by witnesses by international news sources including CNN and ABC,

underscores the value of citizen journalism on YouTube to help distribute Canadian news around the world.

DOCUMENTARY

Documentaries are one of the few successful longform formats on YouTube. Ranging in length between fifteen and seventy-five minutes, they tend to be shorter than theatrically-released feature-length documentaries.

Canadian creators are featured on YouTube's recently launched subscription service, YouTube Premium. These documentaries include Lilly Singh's 2016, *A Trip to Unicorn Island*, about Singh's thirty city world tour; and two-time Academy Award winning filmmaker Barbara Kopple's *This Is Everything* (2016) that documents YouTube star GigiGorgeous' transition from male to female.

SHAWN MENDES

245.6M VIEWS
18M SUBSCRIBERS

As of April 2019

Grammy Award nominated, multi-platinum singer-songwriter, Shawn Mendes learned to play guitar by watching YouTube tutorial videos at the age of 14. Mendes is from Pickering, Ontario and got his start by posting his cover videos on YouTube and Vine. Mendes quickly gained a following. Within a day of posting his first video he gained 10K likes and as many followers. It did not take long before Mendes garnered the attention of talent manager, Andrew Gertler.

Gertler brought Mendes to Island Records in January 2014 which led to a partnership. Mendes released his first single "Life of the Party" on June 26, 2014. The song rose to #24 on Billboard's Hot 100, making Mendes the youngest ever artist to debut in the top 25 on the US Billboard Hot 100. Mendes has since released three studio albums, all of which debuted

at #1 on the Billboard Top 200 album charts. Most recently, 2018's self-titled album Shawn Mendes became one of the top best-selling debuts of the year and made Mendes the third youngest solo artist ever to have three consecutive #1 albums.

In 2018, Mendes starred in a YouTube documentary, Shawn Mendes - Artist Spotlight Stories (directed by another YouTube star Casey Neistat) as part of YouTube's Artist Spotlight series. At the 2019 Grammy Awards, Mendes performed "In My Blood" with Miley Cyrus. The music video for this song has over 250 million views to date. Moreover, Mendes's YouTube videos have been viewed over 6 billion times.

THE DOMESTIC GEEK

132M VIEWS

1.6M SUBSCRIBERS

As of April 2019

Sara Lynn Cauchon launched The Domestic Geek in 2014 while working as a TV producer. Her YouTube channel was a personal and creative outlet dedicated to inspiring cooks with her signature brand of healthy, easy and delicious recipes. The Domestic Geek has grown into a full lifestyle channel covering topics beyond food such as hacks for the home and yoga inspiration. The channel, which started off as a side hustle, grew into a successful channel that allowed Cauchon an opportunity to have control, financial reward and job satisfaction beyond her old day job. Cauchon, the self-titled “accidental entrepreneur,” is a YouTube success who employs four full-time staff in Toronto and has a dedicated following.

CBC

536.2M VIEWS | 1.2M SUBSCRIBERS

As of April 2019



Since the 1930s, CBC/Radio Canada has kept Canadians informed about news in their communities, country, and the world. It is the country's largest news organization and it employs several hundred journalists in Canada and internationally. The CBC YouTube channel launched in 2014. The channel disseminates Canadian news

stories, including coverage of the government, and The House of Commons' Question Period. With 1.2M subscribers, CBC is the only news channel to appear on Social Blade's list of Canada's 250 Top YouTube Channels. By comparison to two other Canadian news sources, Global News has 477K subscribers, and CTV has 197K.

VICE

2.2B VIEWS | 11M SUBSCRIBERS

As of April 2019



Vice launched its YouTube channel in December 2005. The channel's "About" page describes Vice as "The Definitive Guide To Enlightening Information". From every corner of the planet, our immersive, caustic, ground-breaking and often bizarre stories have changed the way people think about culture, crime, art, parties, fashion, protest, the internet and other subjects that don't even have names yet." Vice Media LLC was founded in Montreal in 1994, by

Suroosh Alvi, Shane Smith and Gavin McInnes as the magazine, Voice of Montreal. This launched into a pan media empire for millennial audiences. Vice is one of the few YouTube channels that has mastered longform documentary on the platform, including 2017's "Charlottesville: Race and Terror" and 2017's Emmy nominated, "A House Divided" featuring Vice co-founder Shane Smith interviewing President Barack Obama.

CANADIAN YOUTUBE CONSUMERS

Embracing Unique Value Propositions



“The whole world is there.”

**CANADIAN YOUTUBE CONSUMER,
NOVEMBER 2018**

The Canadian YouTube audience is large. Our study indicates that 76% of Canadian consumers use YouTube which is a higher percentage than Google’s public statistic¹⁰ that 24 million Canadians are YouTube consumers, about 65%.

We surveyed 1500 YouTube consumers across Canada.¹¹ The findings demonstrate that YouTube attracts audiences with a number of unique value propositions including a high variety of distinctive, engaging content from around the world that is accessed freely, easily, and is always available. Each of the consumer value propositions demonstrates that YouTube is customer-centric in ways that are unmatched by most domestic media offerings.

Below we explore the results of our consumer survey to provide detailed answers to three questions: How do Canadians use the YouTube platform? What do they use it for? And, what is it about YouTube that they value so highly?

In light of the variety of ways that Canadians engage with YouTube to access content, and the multitude of reasons that they do so, we will interchangeably refer to them as YouTube audiences, users, viewers, and consumers.

3.1 CANADIAN YOUTUBE CONSUMERS: PLATFORM USAGE

3.1.1: How Canadians access YouTube

Canadians access YouTube from four main devices: desktop/laptop computers, smartphones, tablets, and televisions. In every case, all that is needed is a browser and an Internet connection.

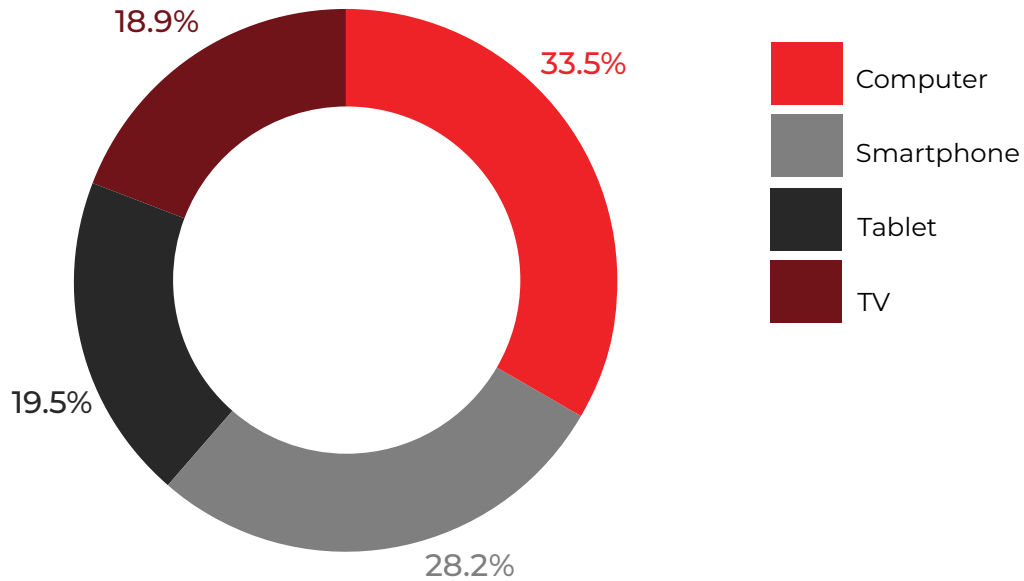
Nearly 60% of respondents reported that they use a computer to watch YouTube, while around 50% use a smartphone, and about 35% use a tablet. Thirty percent use a TV (respondents could select more than one device). Preference for a particular device varies by age, with smartphones clearly preferred by younger users. YouTube’s most recent statistics indicates that mobile access averages 70% of total watchtime globally.¹²

About 53% of Canadian users access YouTube without an account. This means they are probably more casual users than those with an account, and less likely to be members of a ‘deep audience’ (a highly engaged and recurring audience) for any particular YouTube creator or channel.

3.2 YOUTUBE: A UNIQUE HYBRID MEDIUM

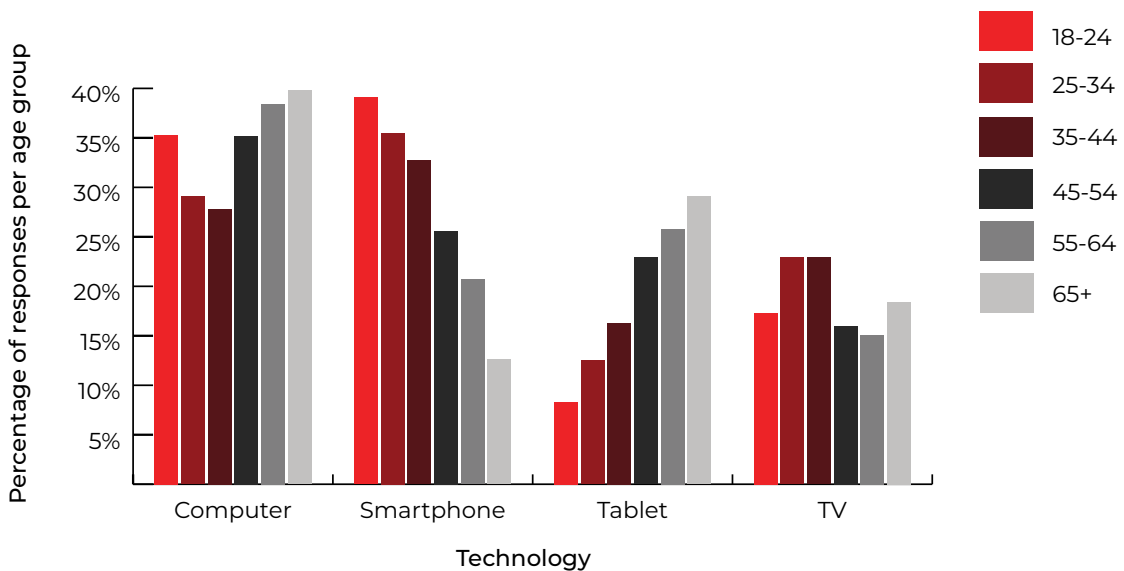
YouTube’s user interface provides an array of features including: search, channel subscription, skipping an ad, new upload notifications, viewing recommendations,

FIGURE 3.1: CANADIAN YOUTUBE CONSUMERS: ACCESS BY DEVICES



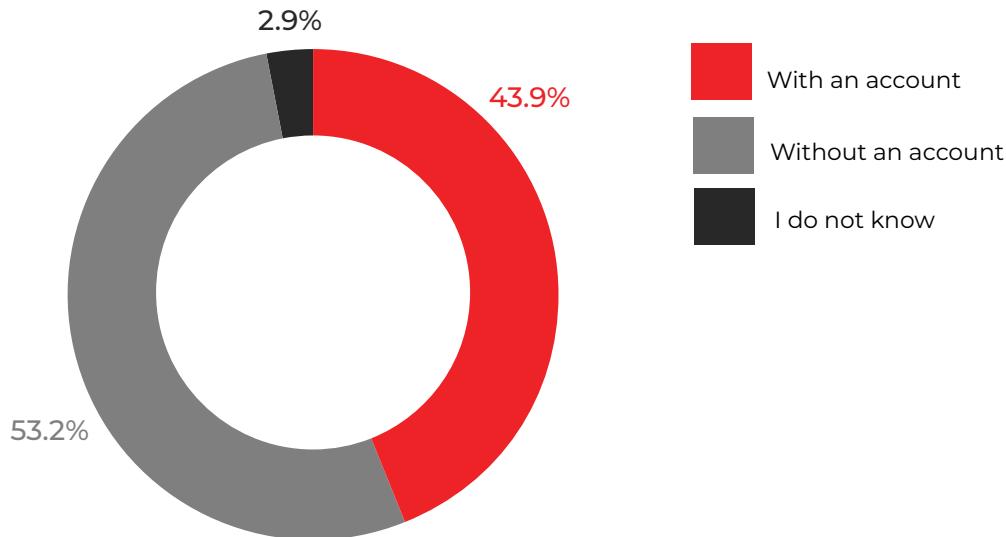
Note: TV includes smart TV, casting device, set-top box, video game console; Option of "Other" left out due to insignificant response

FIGURE 3.2: CANADIAN YOUTUBE CONSUMERS: ACCESS BY DEVICES BY AGE



Note: TV includes smart TV, casting device, set-top box, video game console; Option of "Other" left out due to insignificant response

FIGURE 3.3: CANADIAN YOUTUBE CONSUMERS: USAGE WITH/WITHOUT ACCOUNT



sharing, liking or disliking a video, number of views per video, date of upload, commenting, creating a playlist, watching someone else's playlist, connecting with creators, and closed captioning. When we asked Canadian YouTube consumers about the importance of each of eleven YouTube features, participants expressed the strongest preference for the features of YouTube offering personal choice.

Eighty-nine percent of respondents indicated the importance of the service being free. Eighty one percent value the platform's search functionality (only 5% do not see this as a significant feature). Seventy-eight percent value the "skip ad" feature. YouTube is effectively a 'MeTube' in which "Choice + Instant + Easy" underpin the value proposition.

As Figure 3.4 indicates, Canadian YouTube audiences

are not as attached to YouTube's interactive functions. While 45% of respondents valued being able to see the date a video was uploaded, 37% valued recommendations, and 33% valued the ability to share a video. Valuations continue to decrease in correlation with YouTube's interactive functions. This suggests that although YouTube is often considered a social medium, most Canadian YouTube audiences do not use the platform to connect or communicate with each other. Canadian YouTube audiences want to get on YouTube to find exactly what they are looking for and watch it.

The participatory culture of social media - the way in which audiences interact, connect, collaborate, create and view content, has been the subject of much research. Australian researchers Craig and Cunningham¹¹³ theorize that YouTube is uniquely positioned in the media ecosystem and that its content

is a unique hybrid of its two largest influences: “SoCal” which refers to southern California/Hollywood, the global epicenter of longform content, and “NoCal” which refers to northern California/Silicon Valley, the global epicenter of social media. While the Craig-Cunningham research was interview-based, our Canadian research appears to be the first quantitative study to confirm this consumer behaviour. YouTube is uniquely positioned in both the Canadian and global media ecosystem as a hybrid format, neither legacy nor social media.

CANADIAN YOUTUBE CONSUMERS ON WHAT THEY VALUE MOST ABOUT YOUTUBE

“La possibilité de regarder ce qu’on veut quand on le veut.”

– Canadian YouTube consumer

“It’s easy to use, if you’re just wanting to watch for 10 mins there’s a video and if you want to watch for an hour there’s a video.”

– Canadian YouTube consumer

“I like the fact that whatever I want to watch seems to be available whenever I search for something.”

– Canadian YouTube consumer

SOME CANADIAN YOUTUBE CONSUMERS VALUE TRAVEL VIDEOS THE MOST OF ANY ASPECT OF YOUTUBE...

“Seeing vacation videos from people around the world to help our own planning.”

– Canadian YouTube consumer

“People who post helpful or informative videos to help me solve my problems. Videos from other places in the world informing me of their merit (travel videos).”

– Canadian YouTube consumer

... AND ALSO REFER TO TRAVEL VIDEOS WHEN DISCUSSING THE DIVERSITY THEY SEE ON YOUTUBE.

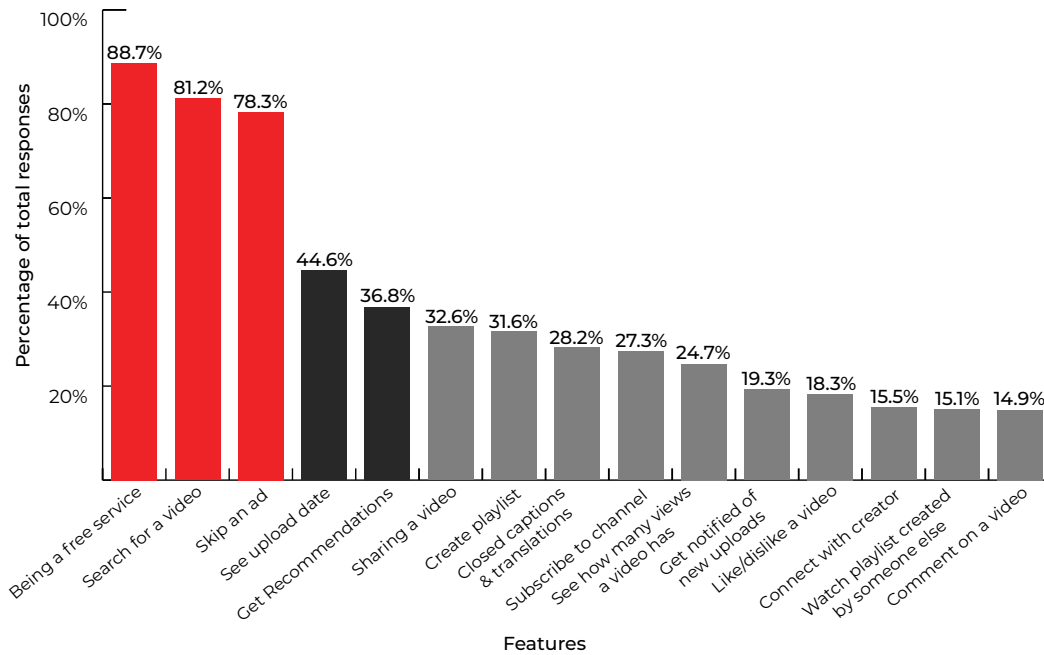
“The YouTube platform allows me to watch travel vlogs and food from different countries.”

– Canadian YouTube consumer

“Travel tours and blogs created by real people”

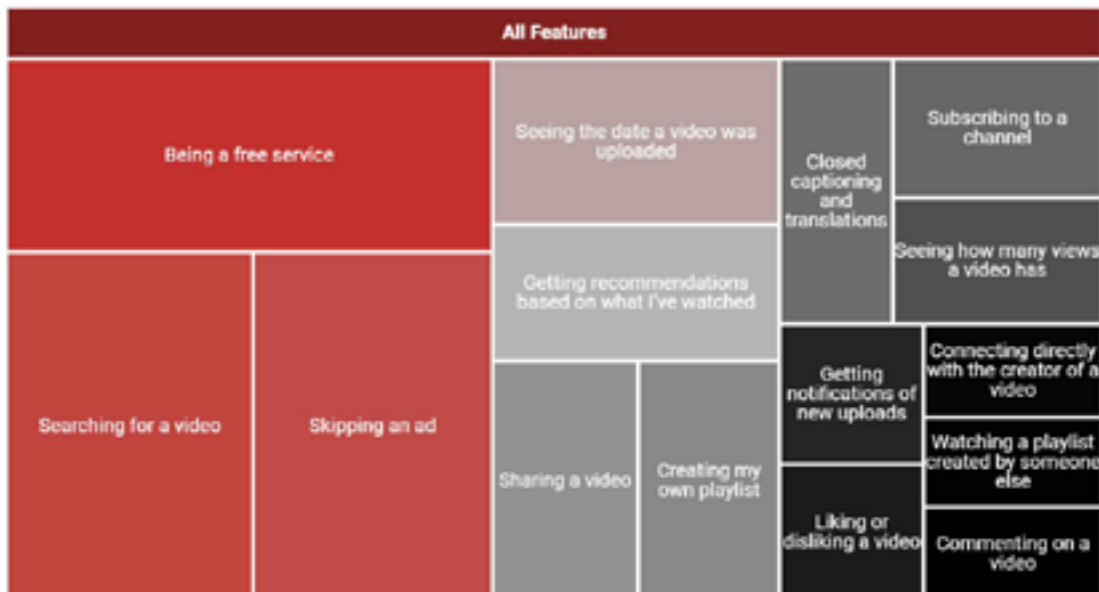
– Canadian YouTube consumer

FIGURE 3.4: CANADIAN YOUTUBE CONSUMERS: IMPORTANCE OF PLATFORM FEATURES



Note: Data includes respondents who noted a feature as "Extremely Important" or "Very Important"

FIGURE 3.5: CANADIAN YOUTUBE CONSUMERS: IMPORTANCE OF PLATFORM FEATURES (HEAT MAP)



3.3 CANADIAN YOUTUBE CONSUMERS: COMPARISON TO OTHER MEDIA USE

3.3.1: Entertainment (including sports and comedy)

When Canadian consumers are looking for screen-based entertainment, YouTube is among their top three choices. Sixty-one percent of respondents report that they go to online TV when they want screen-

“Seeing Canadian-specific content is not important to me. I largely use YouTube for entertainment purposes, so the distinction is not an important one.”

– Canadian YouTube consumer on why they do not actively search for Canadian Content

“I like that it is an alternative to mainstream entertainment and offers such a wide variety of subjects.”

– Canadian YouTube consumer on what they value about YouTube

“Always there when I need something, especially entertainment.”

– Canadian YouTube consumer on what they value about YouTube

based entertainment. Sixty percent turn to traditional television, and 52% turn to YouTube (Figure 2.6).

While YouTube is a third destination for screen entertainment, it does not appear to compete directly with audiences for long-form fiction offered on TV. As discussed in Chapter 2, YouTube is mostly composed of new genres of video entertainment not readily available anywhere else in the media ecosystem.

Furthermore, many viewers rely on YouTube for informed comment about legacy entertainment experiences

CANADIAN YOUTUBE CONSUMERS ON WHAT THEY VALUE MOST ABOUT YOUTUBE

“My routine on YouTube revolves entirely around the following: MSNBC (which I don’t get with my cable sub), CNN ESports (Starcraft), Saturday Night Live Clips, Stephen Colbert...”

– Canadian YouTube consumer

“...I only use YouTube to watch TV clips and other entertainment features.”

– Canadian YouTube consumer

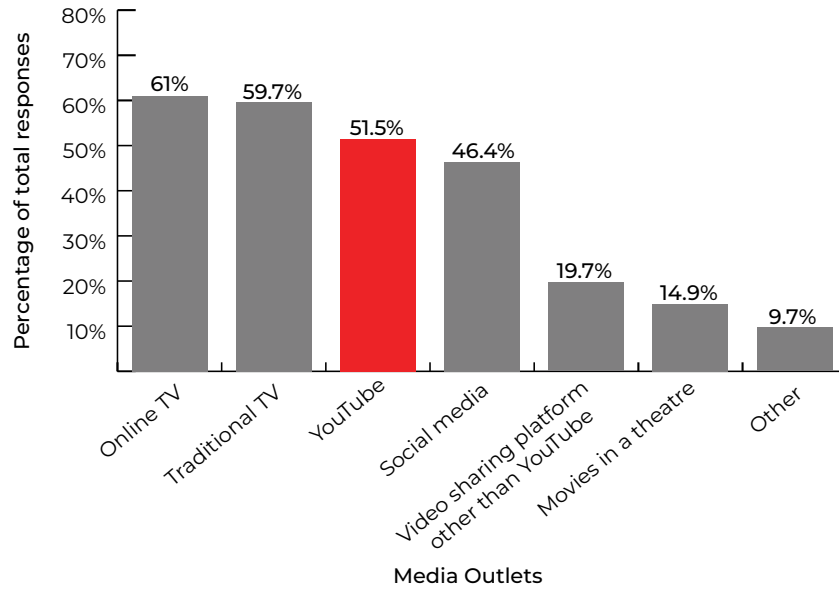
“...being able to search for favourite TV and movie clips and watch them when I like.”

– Canadian YouTube consumer

“...the ability to search out a video fragment, like a piece of news, or a joke from a sitcom or a scene from a movie.”

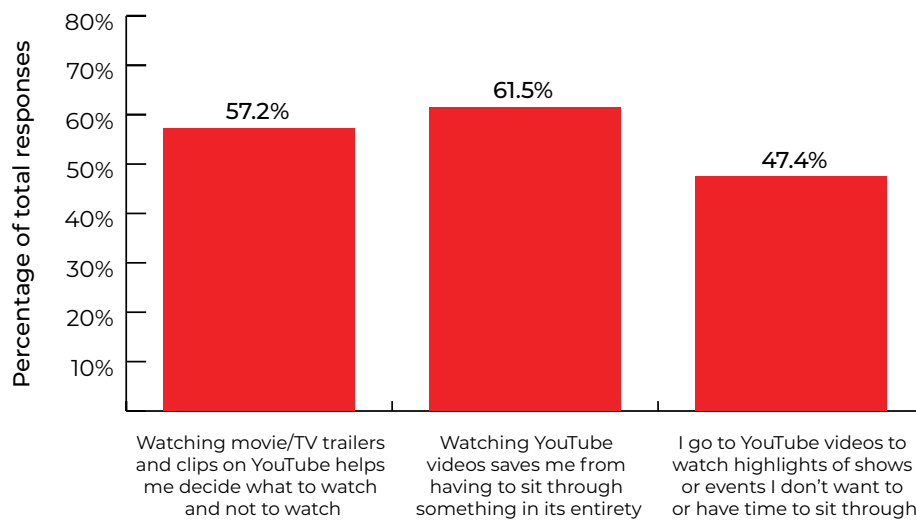
– Canadian YouTube consumer

FIGURE 3.6: CANADIAN YOUTUBE CONSUMERS: WHERE THEY GO FOR ENTERTAINMENT



Note: Data shows respondents who answered "Frequently" which was defined as "Always, Often"

FIGURE 3.7: CANADIAN YOUTUBE CONSUMERS: TV ON YOUTUBE



Respondents who agree with the statements above

Note: Responses for "Strongly" and "Somewhat Agree" were combined as "Agree"

and opportunities to sample those experiences to help decide how to allocate attention in a world awash in content abundance.

In this respect, YouTube appears to complement legacy entertainment with trailers, highlights, or commentaries on longer content. As the chart shows, 57% of respondents view trailers to help make a decision about what to watch, 61% watch YouTube videos in order not to watch an entire program, and 47% use YouTube to catch up on shows or events that they do not have time to watch.

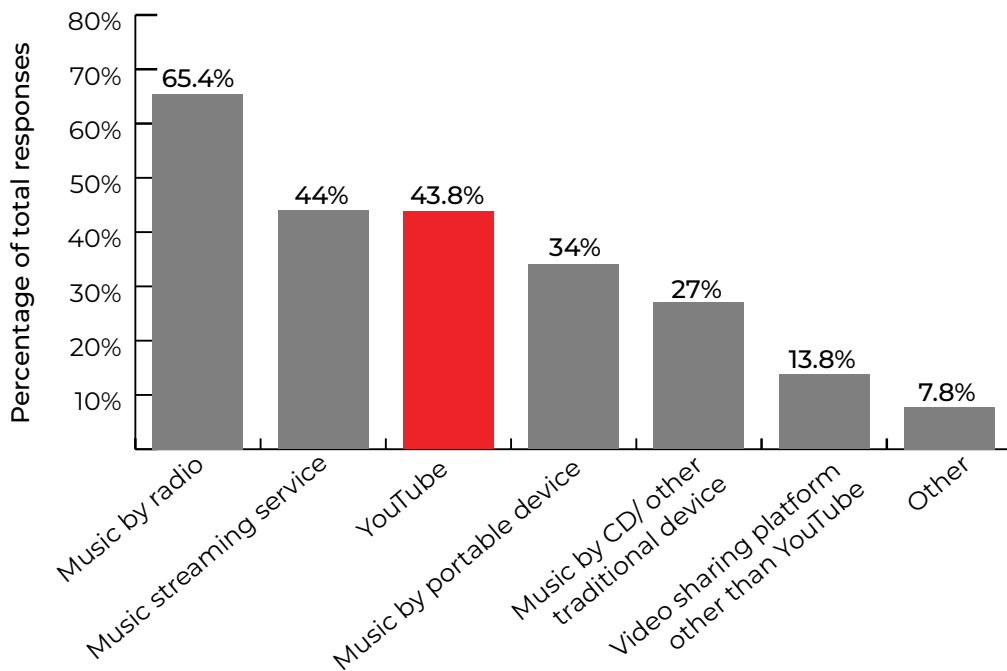
3.3.2: Music

Our results suggest that YouTube is not the first place that Canadian YouTube audiences go to listen to music

(Fig. 3.8). Radio (65% of respondents) is still their first source for music. We attribute this surprising finding about the enduring popularity of legacy radio, at least in part, to it also being free to use (all you need is a device) and convenient -- which parallels some of the features most valued by audiences who use YouTube.

YouTube shares the second choice for music with streaming services such as Spotify, Apple Music, Google Play Music, or YouTube Music. Our analysis is that this reflects the newest wave of disruption in music distribution by streaming services, including the streaming capabilities of conventional radio stations, including CBC.

FIGURE 3.8: CANADIAN YOUTUBE CONSUMERS: WHERE THEY GO FOR MUSIC



Note: Data shows respondents who answered "Frequently" which was defined as "Always, Often"

3.3.3: News and information

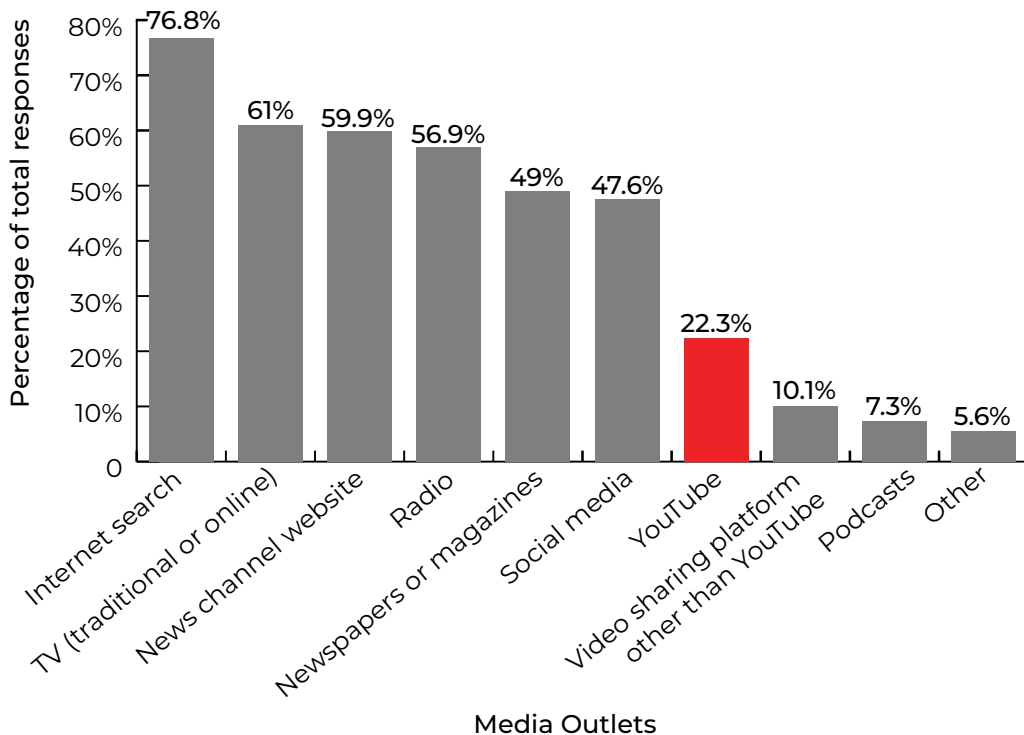
For Canadian YouTube audiences, YouTube is not their primary source of news. Twenty two percent of audiences frequently turn to YouTube for breaking news and information, far behind Internet searches (77%), TV (traditional or online, 61%), news channel websites (60%), radio (57%), newspapers or magazines (49%), and social media (48%).

For nearly 4 out of 5 YouTube viewers, YouTube is not a main news channel. Our study found that YouTube’s strongest value proposition is quite different, and unique in the domestic media ecosystem, as the next section shows.

“Up to date true life information on anything happening in the world. No mass media filtering what we see and are able to digest in order for us to form our own opinions.”

– Canadian YouTube Consumer on what they value most about YouTube

FIGURE 3.9: CANADIAN YOUTUBE CONSUMERS: WHERE THEY GO FOR NEWS AND INFORMATION



Note: Data shows respondents who answered “Frequently” which was defined as “Always, Often”

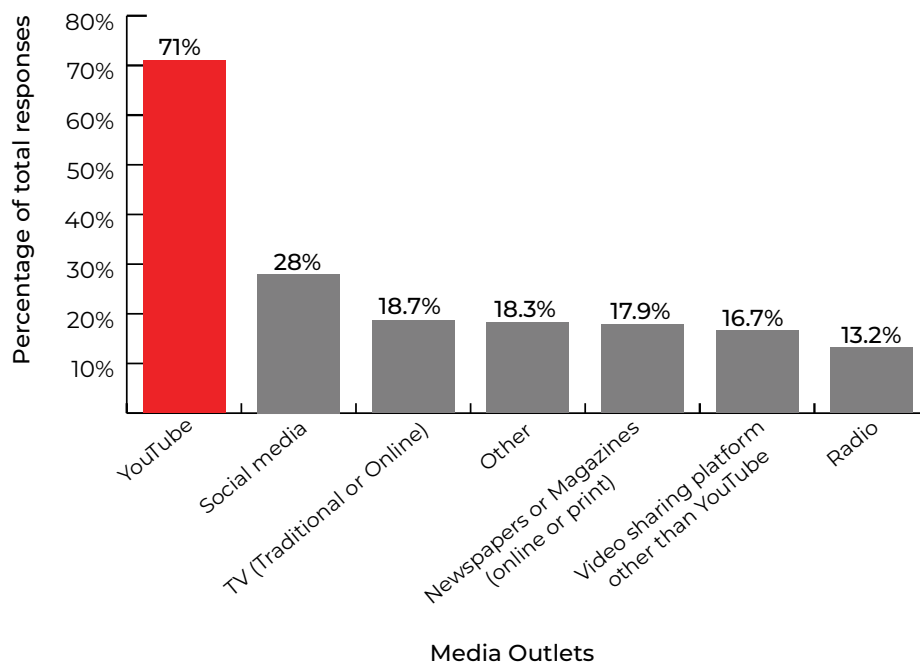
3.4 LEARNING IS A BIG STORY

An unexpected finding from our survey is the substantial importance of YouTube as a source of learning about anything and everything. We asked participants where they go when they want to learn about something (e.g. build something, fix something, start a new project, get beauty or fashion tips, health and fitness information, make a purchase, etc.). An astonishing 71% of respondents indicated that they frequently turn to YouTube when they want to learn something (Fig. 3.10). Learning can be seen to encompass lifestyle, how-to videos including cooking, travel, gardening, repairing an automobile, philosophy, mathematics, music, languages -- almost anything.

Moreover, this finding echoes the intentions of Canadian YouTube creators, as discussed in Chapter 2, particularly as creators gain subscribers for their channels and get to more deeply understand their audiences. The convergence between creators and consumers seems to have evolved the platform into an organic, ever-expanding global video encyclopedia. This purpose sets YouTube apart from every other player in Canada's media ecosystem. As seen in the chart, no other platform or medium can claim to facilitate personal learning in the same way that YouTube can.

As suggested in Chapter 2, this finding seems significant beyond considerations of YouTube's value in the media's ecosystem and relates to larger discussions of productivity. Whether TED Talks, explainers, or product reviews, YouTube seems to have become a unique learning accelerator for YouTube users in their multiple roles as citizens, learners, travelers, parents, caretakers, community participants, and more.

FIGURE 3.10: CANADIAN YOUTUBE CONSUMERS: WHERE THEY GO TO LEARN ANYTHING



Note: Data shows respondents who answered "Frequently" which was defined as "Always, Often"

Also as mentioned, at the corporate level YouTube has noticed this trend as well, asserting that education is a key value proposition of the platform. As expressed in a 2018 Creator Blog: “Everyday, people watch learning-related content over a billion times.” This has led to the expansion of the learning content team, a \$20M fund to support learners, content creators and expert organizations, and the development of new learning features for the “millions of users who come to our platform to learn.”¹¹⁴

3.5 CANADIAN YOUTUBE CONSUMERS: VALUING DIVERSITY

3.5.1: Topical variety: Something for every occasion

With 500 hours of video content uploaded every minute, the huge volume of content on YouTube also means that there is huge topical variety. Even with this volume, the ease of use features ensure that the platform is entirely viewer-centric. As illustrated in Figure 3.11, 81% of survey participants agreed that they could find something for every occasion on YouTube.

In contrast to the common complaint about legacy TV (“500 channels and nothing on”), YouTube has billions of channels and exactly what the viewer wants is always on. No one has to watch videos they are not interested in. One respondent stated, “anything that is not mainstream you can find on [YouTube]. There’s so much diversity that it is hard to even list. But, for myself I love all the how-to videos and the things that I would not be able to find in my local community because I live in such a rural area.”

RESPONSES FROM DIFFERENT SURVEY QUESTIONS REGARDING DIFFERENT TOPICS ALWAYS LED BACK TO THE THEME OF LEARNING

“I find people of all ages explaining topics I need to know about and I can’t find this info anywhere else.”

– Canadian YouTube consumer, on “the diversity available on YouTube that they have not been able to find on other media”

“YouTube has great historical and educational and general information at our fingertips.”

– Canadian YouTube consumer, on what they value most about YouTube

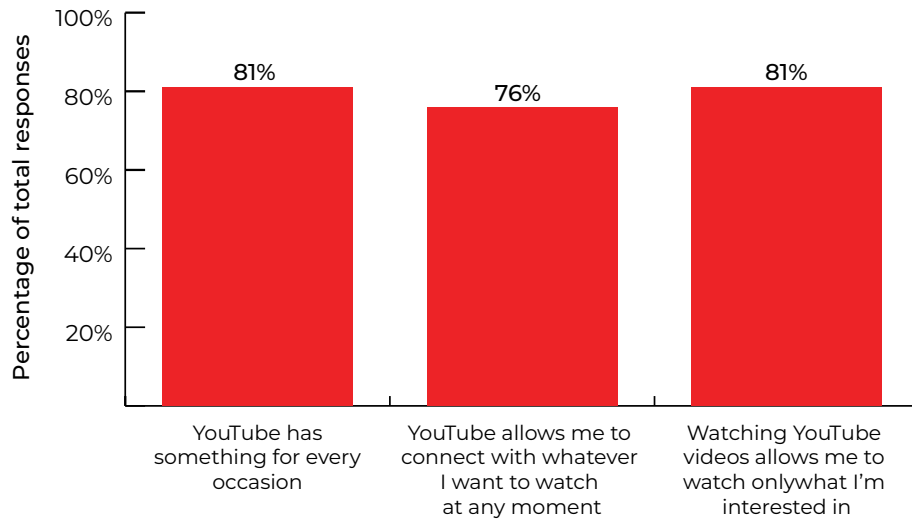
“I’m usually looking to learn something - it doesn’t matter who teaches it if it teaches or helps me solve a problem.”

– Canadian YouTube consumer, on why they do not actively seek Canadian Content on YouTube

“The YouTube platform allows me to watch travel vlogs and food from different countries. It also educates me on diversity ranging from sexual orientation, culture, ethnicities, etc.”

– Canadian YouTube consumer, on “the diversity available on YouTube that they have not been able to find on other media”

FIGURE 3.11: CANADIAN YOUTUBE CONSUMERS: YOUTUBE HAS SOMETHING FOR EVERY OCCASION



Respondents who agree with the statements above

Note: Responses for "Strongly" and "Somewhat Agree" were combined as "Agree"

CANADIAN YOUTUBE CONSUMERS DISCUSSED TOPICAL DIVERSITY AS SOMETHING THEY SEE ON YOUTUBE RATHER THAN ON TRADITIONAL MEDIA OUTLETS

“This speaks to health issues that are not covered by most MS [mainstream] media. Like Lyme and help videos for chronic illnesses.”

– Canadian YouTube consumer

“Accessing content from European content creators, seeing more diverse individuals in that programming from various races/cultures that conventional TV doesn’t always include.”

– Canadian YouTube consumer

“Variety of home made and professional videos on practically every imagineable subject throughout the world at anytime you want to watch.”

– Canadian YouTube consumer

“I can describe the diversity as the fact that there are many different types of videos, and it allows people to express themselves very much. This allows for a lot of diversity, which makes it unique to YouTube...”

– Canadian YouTube consumer

“Ability to discover new things that I have never heard of before: artists, dances, innovations, trends. TV you are restricted to the channels you subscribe too, YouTube is limitless.”

– Canadian YouTube consumer

“I like that it is an alternative to mainstream entertainment and offers such a wide variety of subjects.”

– Canadian YouTube consumer

3.5.2: Diversity on YouTube and representation of people and cultures

“People of every walk of life, every lifestyle, every culture, opinions of young and old, varied languages, of every creed and so much more.”

– Canadian YouTube consumer on diversity they see on YouTube that they do not see in other mainstream media

“Diversity has many forms for me - be it gender, cultural, racial, religious, socio-economic, intellectual, physical, etc. - I have had no issues finding diversity on YouTube.”

– Canadian YouTube consumer on diversity they see on YouTube that they do not see in other mainstream media

Canadian YouTube audiences also embrace the diversity of content, faces, voices, perspectives, languages, cultures, genders and ethnicities on YouTube. As per Figures 3.12 and 3.13, 70% of respondents value the idea of seeing diversity on YouTube as “extremely important” or “very important” and nearly half report they do see these diversities on YouTube. Canadian YouTube audiences also value being able to connect with diverse communities around the world, including their communities of origin.

These perspectives came through even more clearly in the qualitative questions on our survey.

CANADIAN YOUTUBE CONSUMERS DISCUSSED MULTIPLE FORMS OF DIVERSITY AS SOMETHING THEY SEE MORE OFTEN ON YOUTUBE THAN ON TRADITIONAL MEDIA OUTLETS

“A Norwegian reviewer of electric cars, an Autistic weatherman from Nova Scotia, a whisky reviewer from the Isle of Man, a female video essayist, movie and comics reviews from the US Midwest, reviews of tabletop rpgs [role playing board games]”

– Canadian YouTube consumer

“YouTube is cosmopolitan and has a variety of information from all over the world and in different languages.”

– Canadian YouTube consumer

“The YouTube platform allows me to watch travel vlogs and food from different countries. It also educates me on diversity ranging from sexual orientation, culture, ethnicities, etc.”

– Canadian YouTube consumer

“Lots of members of the LGBTQ community post and it doesn’t always have to be about being gay etc. Queens are allowed to be themselves and not a character on a show.”

– Canadian YouTube consumer

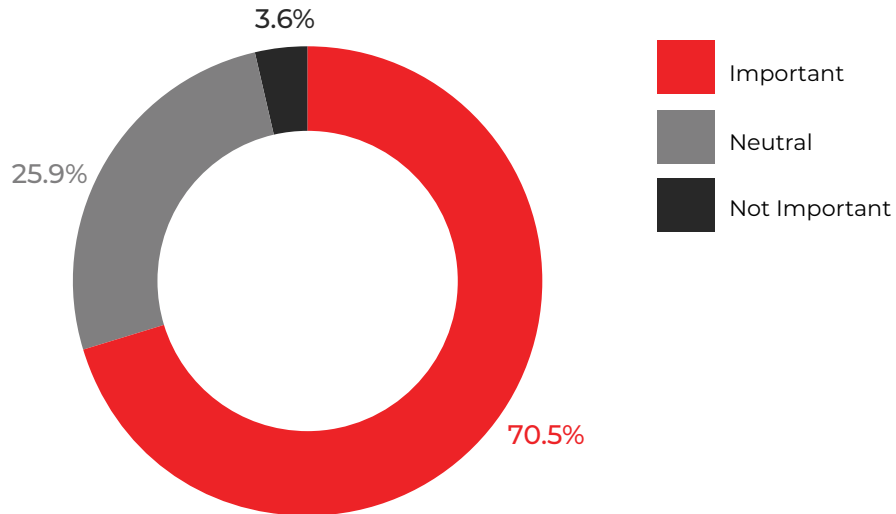
“LGBTQ communities, disabled communities, and other minorities are able to present their perspectives.”

– Canadian YouTube consumer

“Creator-focused work means that people can self-represent and tell their own stories. BIGGEST difference in representation is for the disabled community, who are grossly underrepresented in mainstream media...”

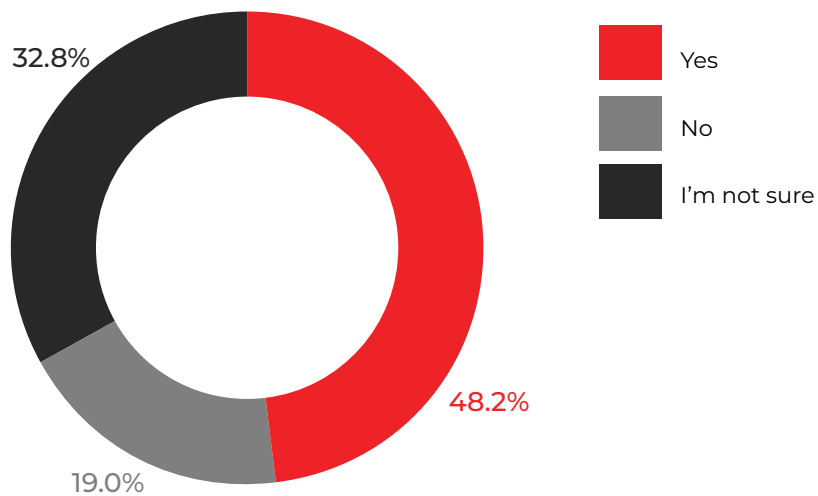
– Canadian YouTube consumer

FIGURE 3.12: CANADIAN YOUTUBE CONSUMERS VALUE SEEING DIVERSITY



Note: "Important" is a combination of respondents who selected "Extremely" or "Very" important, "Not Important" is a combination of "Not very" and "Not at all" Important

FIGURE 3.13: CANADIAN YOUTUBE CONSUMERS SEE DIVERSITIES OF GENDER, ETHNICITY, PERSPECTIVES, AND OTHER DIVERSITY ON YOUTUBE THAT THEY DO NOT SEE AS OFTEN ON MAINSTREAM MEDIA



3.5.3 Accessibility

An important aspect of YouTube diversity is how it facilitates viewing in 80 languages.¹⁵ YouTube also provides a variety of features that allow individuals of varying physical abilities to access its services. Creators can use the “Subtitles/Closed Captioning” feature of YouTube to auto-generate captioning that can be edited to ensure accuracy.

Sometimes on YouTube the process becomes participatory between consumers and creators. Since creators can add in their own captions or use a third-party service for captions, this has encouraged fan participation, with viewers translating content into different languages themselves.

“Free space to entertain myself & others, to explore my passion and possibly future career, to inform the world...Age, race, ability, language barriers are not problematic.”

– Canadian YouTube consumer on what is most valued about being a YouTube creator

3.6 CANADIAN YOUTUBE CONSUMERS: GLOBAL MEDIA PARTICIPANTS

“Je cherche par sujet pas par origine”

CANADIAN YOUTUBE CONSUMER, NOVEMBER 2018

What role does Canadian content play in Canadian YouTube audiences' assessment of YouTube's value proposition? As per Figure 3.14, the three main ways that our respondents understand the meaning of “Canadian content” are: “content that depicts Canadian culture or stories” (56%), “content that is created by any Canadian” (56%), or “content that features a Canadian” (32%). The results of our survey are clear. Figure 3.15 shows that 88% of Canadian YouTube viewers do not actively look for Canadian content on YouTube, while only 12% do. As per Figures 3.16 and 3.17, there are no significant differences by age or primary language spoken in this finding.

Canadian YouTube audiences value YouTube as a window on the world. Nearly 65% of Canadian YouTube consumers value YouTube because it allows them to watch the same content as audiences anywhere else in the world (Fig. 3.18).

FIGURE 3.14: CANADIAN YOUTUBE CONSUMERS DEFINE CANADIAN CONTENT

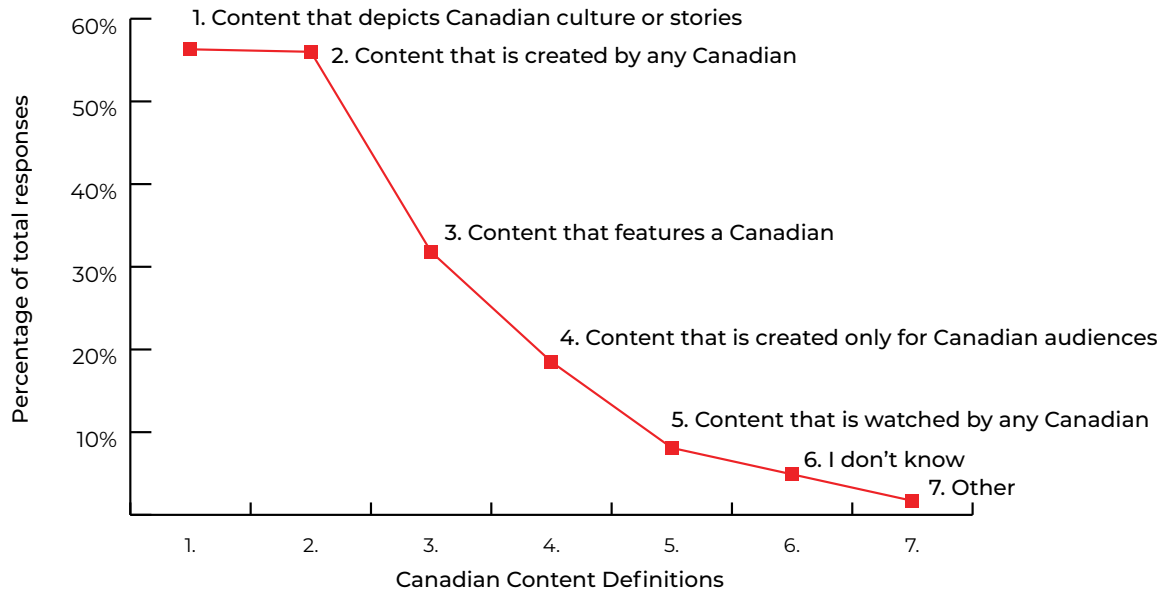


FIGURE 3.15: CANADIAN YOUTUBE CONSUMERS DO/DO NOT ACTIVELY SEEK CANADIAN CONTENT ON YOUTUBE

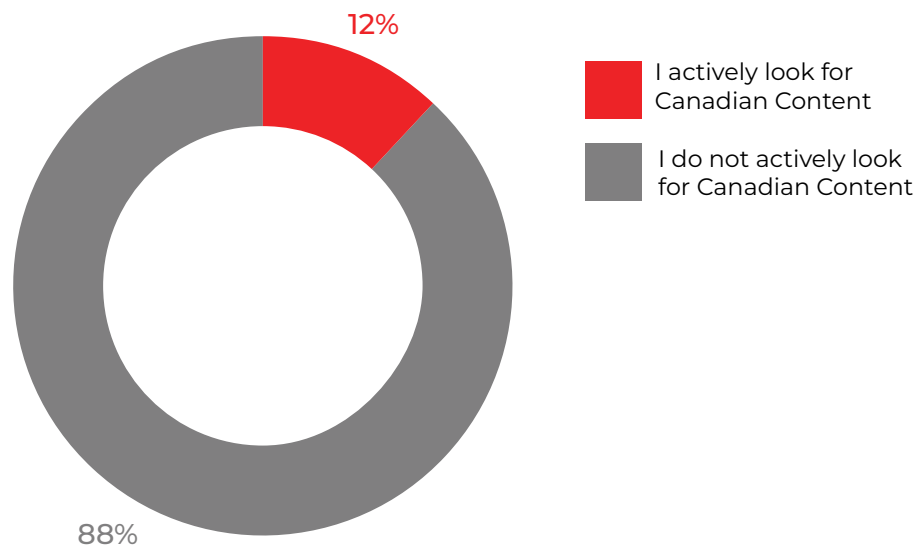


FIGURE 3.16: CANADIAN YOUTUBE CONSUMERS WHO DO NOT ACTIVELY SEEK CANADIAN CONTENT BY AGE

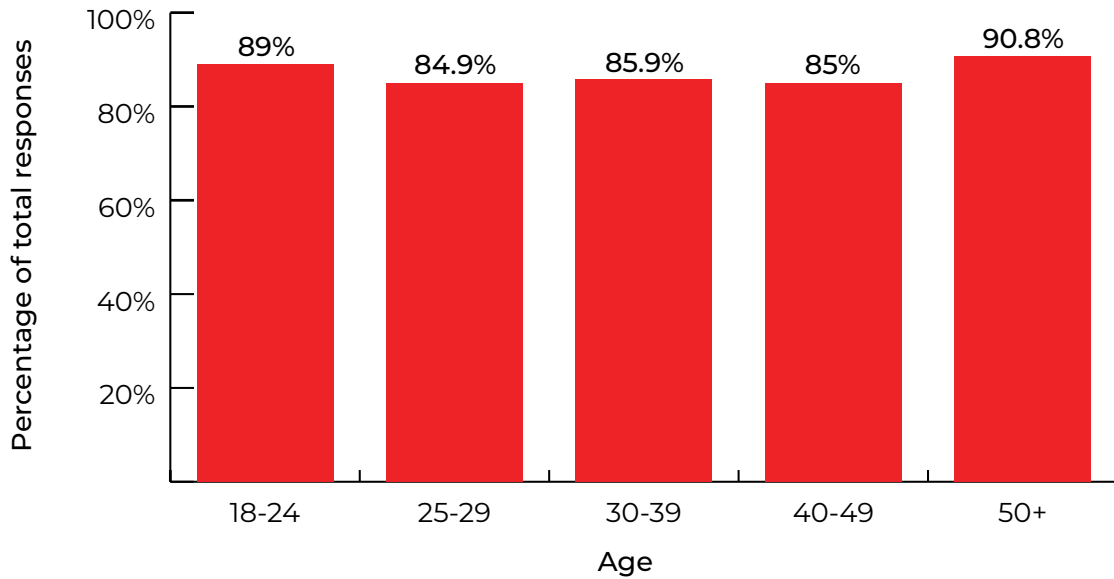
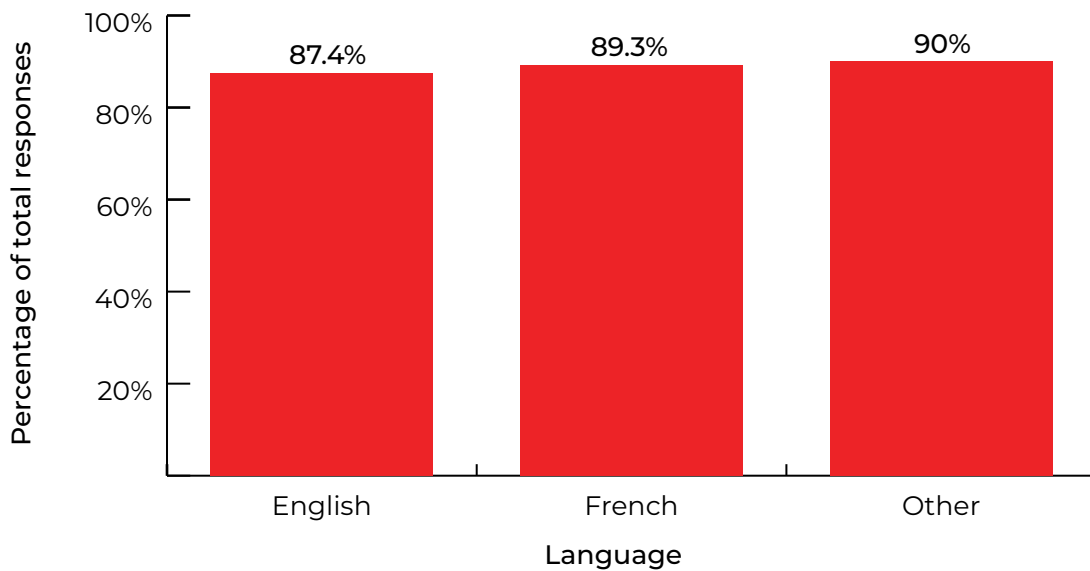


FIGURE 3.17: CANADIAN YOUTUBE CONSUMERS WHO DO NOT ACTIVELY SEEK CANADIAN CONTENT BY PRIMARY LANGUAGE SPOKEN



“Before, I never got to watch TV shows from other countries on TV much. But when YouTube started rolling, a few years ago, Korean broadcasting networks started appearing and I was introduced to a lot of Korean music, art, TV shows and so on.”

- Canadian YouTube consumer on what they value most about YouTube

“I can enjoy shows that I’d only be able to see if I was in the UK, India, & many other places...”

- Canadian YouTube consumer on what they value most about YouTube

“I appreciate being able to see aspects of cultures in other lands, WITHOUT a commentator telling me what to think of the content I am viewing.”

- Canadian YouTube consumer on what they value most about YouTube

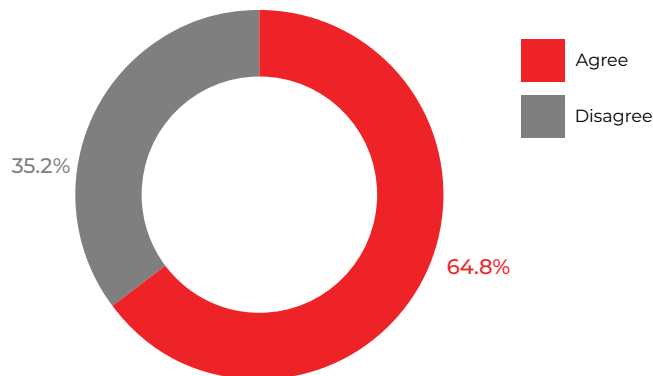
“Other sources edit and cherry pick stuff in order to influence....here all is made by people from every walks of life and viewpoints.”

- Canadian YouTube consumer on what they value most about YouTube

“[I value] videos from other countries’ TV stations.”

- Canadian YouTube consumer on what they value most about YouTube

FIGURE 3.18: CANADIAN YOUTUBE CONSUMERS: YOUTUBE IS THE BEST PLACE FOR ME TO WATCH THE SAME VIDEOS AS ANYONE ELSE IN THE WORLD



Note: Responses for “Strongly Agree” and “Somewhat Agree” were combined as “Agree”, “Strongly Disagree” and “Somewhat Disagree” were combines as “Disagree”

EXAMPLES WHY 88% OF CANADIAN YOUTUBE CONSUMERS *DO NOT* ACTIVELY SEARCH FOR CANADIAN CONTENT

“Companies in Canada are behind. I watch some Canadian YouTube creators but came to them searching other things. Their being Canadian is tangential.”

– Canadian YouTube Consumer

“I am interested in the human story, not limited by citizenship.”

– Canadian YouTube Consumer

“Il me semble que ça limiterait mes recherches.”

– Canadian YouTube Consumer

“There is already a lot of Canadian content available to me in other media forms. I use YouTube to get a more global perspective.”

– Canadian YouTube Consumer

“We live in a global world; why restrict yourself to one part of it?”

– Canadian YouTube Consumer

“I like science and it comes from all over the world and Canada.”

– Canadian YouTube consumer

“...est souvent possible de le voir sur d'autres plateformes (i.e. Tou.tv, Téléquebec en ligne, etc.)”

– Canadian YouTube consumer

EXAMPLES OF WHY 12% OF CANADIAN YOUTUBE CONSUMERS *DO* ACTIVELY SEARCH FOR CANADIAN CONTENT

“I am a proud Canadian and I like to see stories about Canada and issues presented from a Canadian point of view. It helps us as a country not to lose our voice in the USA dominated media world.”

– Canadian YouTube Consumer

“Even in the context of learning a skill like “how to repair espresso machine” for example, finding a Canadian source is likely to be more relevant - where to get parts, suppliers...”

– Canadian YouTube Consumer

“Better reflection of local thinking. The idea is NOT to limit access to material from all over the world. Rather, accessing local thinking on a subject allows for better interpretation of that subject given local context...”

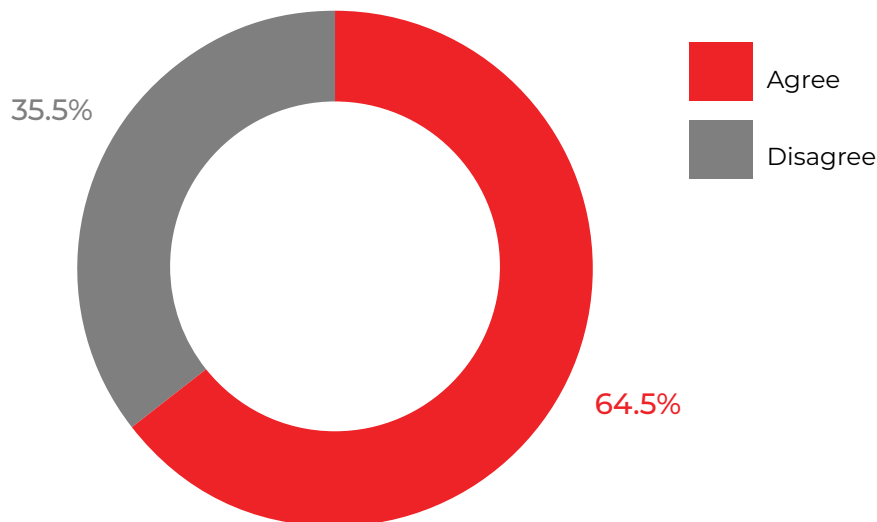
– Canadian YouTube Consumer

Further related to Canadian content, we asked Canadian YouTube viewers several questions having to do with regulation and promotion of Canadian content on YouTube. While Canadian YouTube audiences are not of one mind, most clearly favour direct, unfiltered access to YouTube content. Figure 3.19 shows that 64.5% of Canadian YouTube audiences strongly or somewhat agree with the statement, “I believe no government or organization should play a role in what content I choose to watch on YouTube”. Those who expressed this view appear to overlook that YouTube itself plays a role in what content is available through its Community Guidelines and recommendation algorithm. However, since the context of the question was specifically related to Canadian content, not the more general question of regulation of inappropriate content, we interpret the response as indicating that restrictions on what is

available on YouTube in the name of cultural nationalism would not be well received. This analysis seems to be further corroborated by the findings in Figure 3.20 showing that 84% percent of Canadian YouTube viewers strongly or somewhat *disagree* that the Canadian government should play a role in regulating YouTube content.

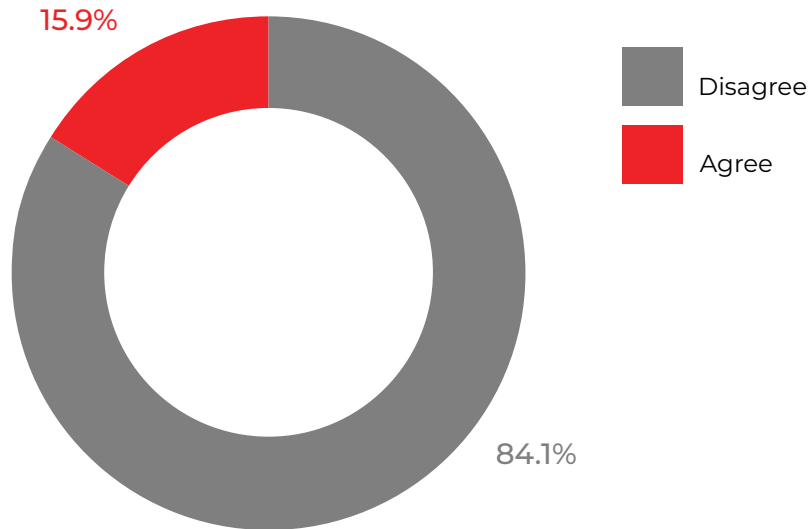
While Canadian YouTube audiences do not welcome *regulation* to require exhibition of Canadian content, they are less concerned about *promotion* of Canadian content. Thirty eight percent of respondents agree that YouTube should promote Canadian content to YouTube viewers (Fig. 3.21). Opinion is split on whether this would enhance (23%) or negatively affect (27%) the YouTube viewing experience, with the largest group (49.6%) expressing a neutral view on this question (Fig. 3.22).

FIGURE 3.19: CANADIAN YOUTUBE CONSUMERS WHO BELIEVE THAT NO GOVERNMENT OR ORGANIZATION SHOULD PLAY A ROLE IN WHAT CAN BE WATCHED ON YOUTUBE



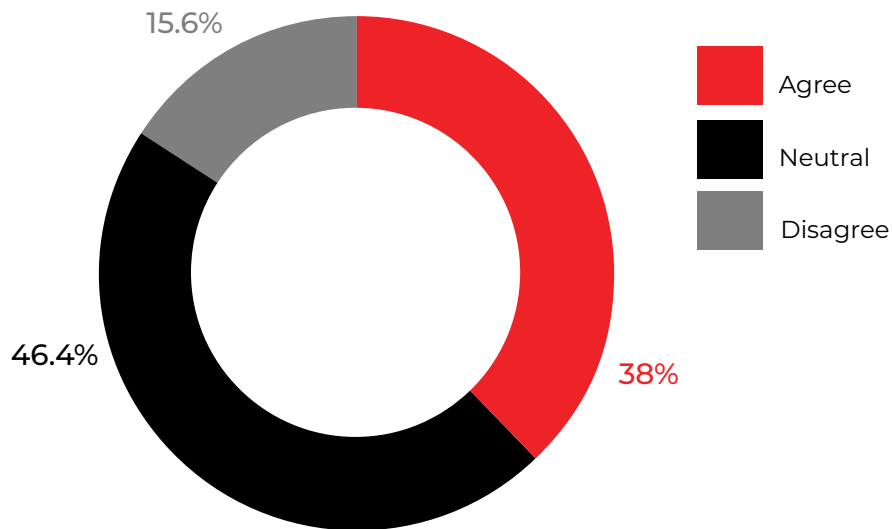
Note: Responses for “Strongly Agree” and “Somewhat Agree” were combined as “Agree”, “Strongly Disagree” and “Somewhat Disagree” were combined as “Disagree”

FIGURE 3.20: CANADIAN YOUTUBE CONSUMERS WHO BELIEVE THAT THE CANADIAN GOVERNMENT SHOULD PLAY A ROLE IN REGULATING THE CONTENT AVAILABLE TO CANADIANS ON YOUTUBE



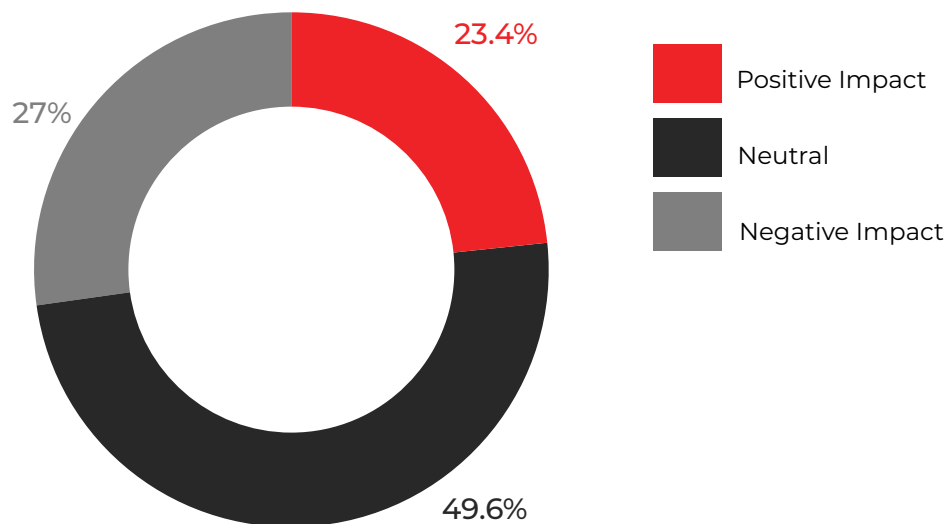
Note: Responses for "Strongly Agree" and "Somewhat Agree" were combined as "Agree", "Strongly Disagree" and "Somewhat Disagree" were combined as "Disagree"

FIGURE 3.21: CANADIAN YOUTUBE CONSUMERS: SHOULD YOUTUBE PROMOTE CANADIAN CONTENT TO VIEWERS?



Note: Responses for "Strongly Agree" and "Somewhat Agree" were combined as "Agree", "Strongly Disagree" and "Somewhat Disagree" were combined as "Disagree"

FIGURE 3.22: CANADIAN YOUTUBE CONSUMERS' RESPONSE TO THE QUESTION: IMAGINE IF CANADIAN CONTENT ON YOUTUBE WERE PROMOTED IN PLACE OF OTHER CONTENT (E.G. ON THE HOMEPAGE) BUT ONLY TO CANADIAN VIEWERS. HOW WOULD THIS IMPACT YOUR YOUTUBE EXPERIENCE?



Note: "Very Positively" and "Positively" were combined into "Positive Impact" and "Very Negatively" and "Negatively" were combined into "Negative Impact"

3.7: CANADIAN YOUTUBE CONSUMERS: THEIR FUTURE MEDIA USE

When asked to envision their use of media five years from now, Canadian YouTube consumers of all ages predicted that their use of YouTube will grow, as will their use of online TV, online newspapers, and online magazines. Unsurprisingly, the Canadian media ecosystem is moving onto the Internet and away from legacy services.

We asked Canadian YouTube audiences about their use of media now and five years from now.

Currently, along with music radio, YouTube is the most heavily used media platform or channel. Eighty percent of Canadian YouTube audiences use YouTube on a daily or weekly basis. Next in order of intensity of use are social media channels (75% are daily or weekly users), traditional TV (66%), and online TV (63%).

FIGURE 3.23: CANADIAN YOUTUBE CONSUMERS: FREQUENTLY USED MEDIA NOW

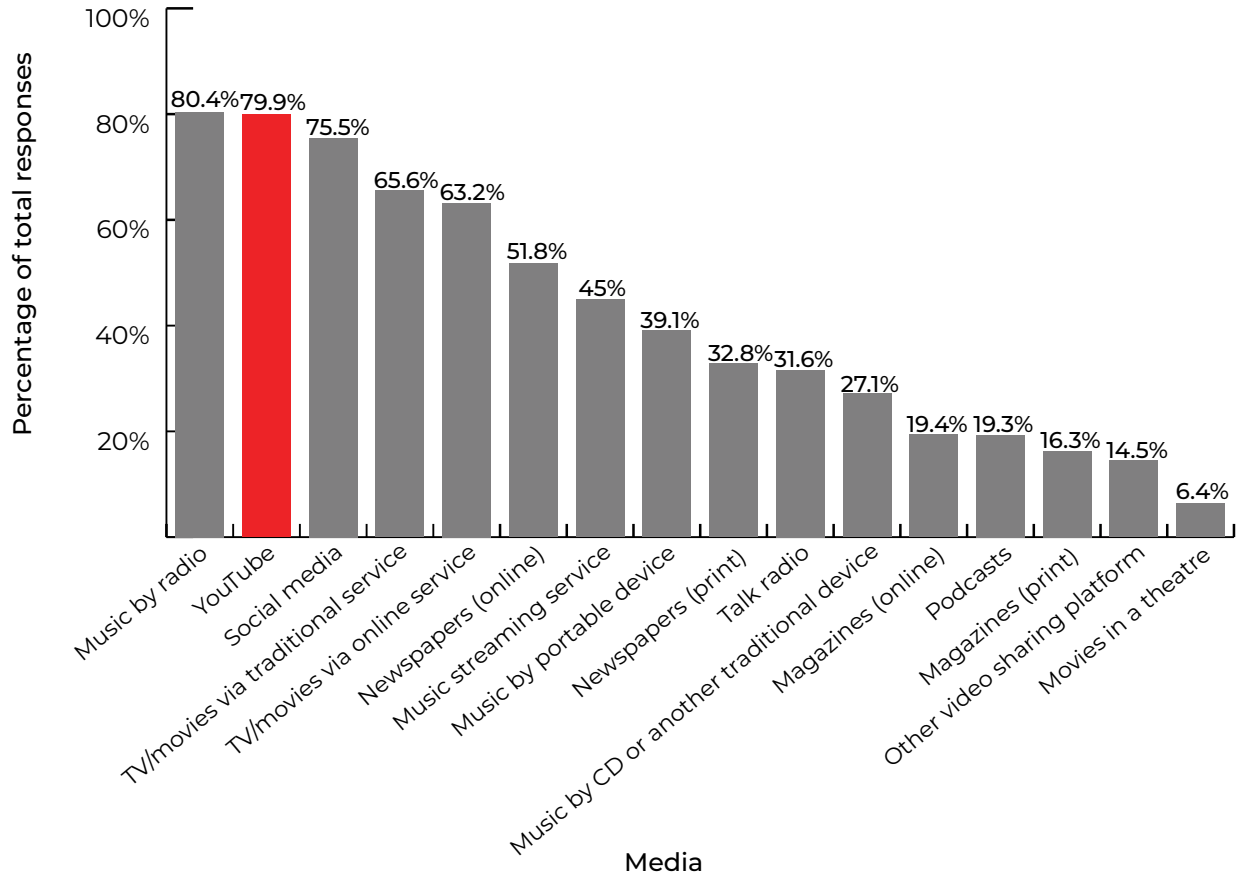
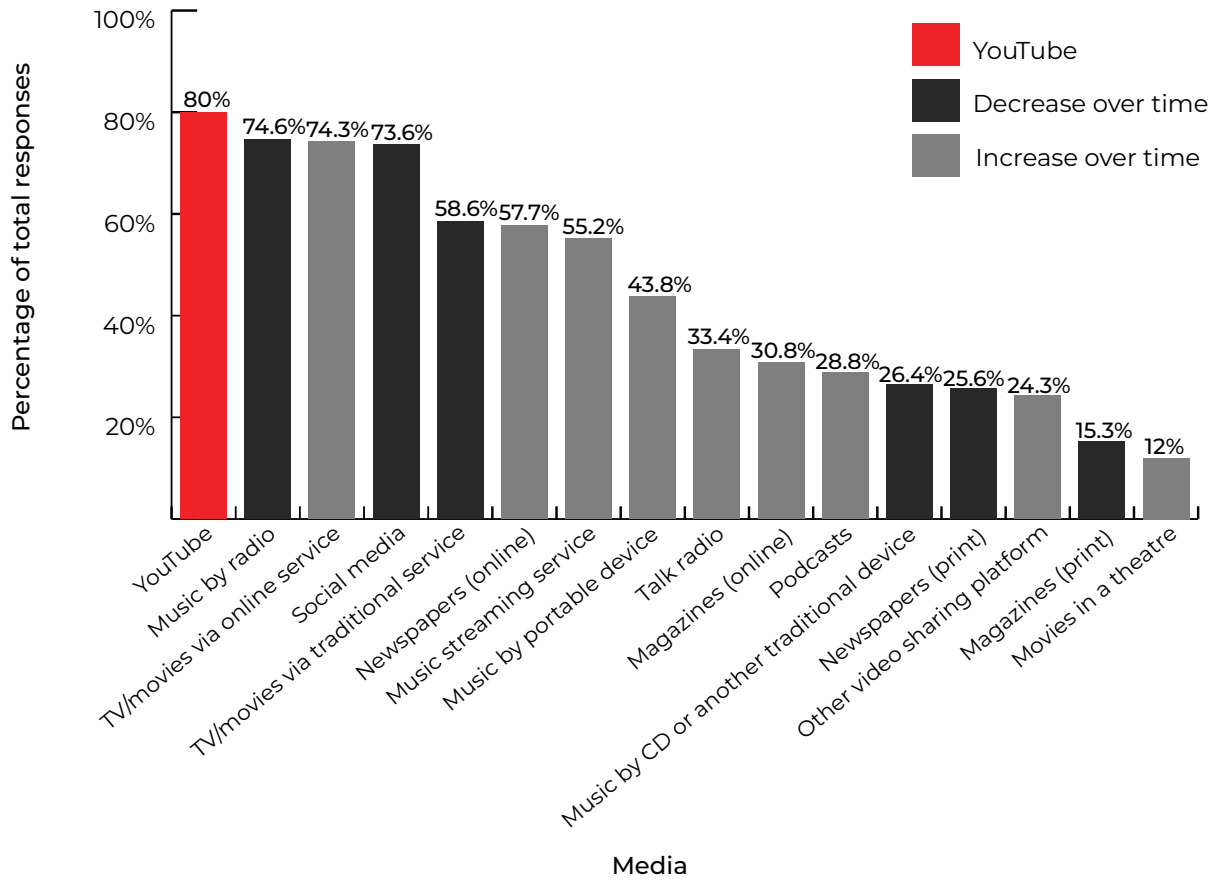


FIGURE 3.24: CANADIAN YOUTUBE CONSUMERS PREDICT THEIR FREQUENT MEDIA USE IN 5 YEARS



YOUTUBE IN CANADA

Unique value proposition

04

“The freedom to create whatever you want, when you want, and to have access to an entire world audience. All of this value is handed over to the content creator, we can do what we want.”

- Canadian YouTube creator on what they value most about their experience as a YouTube creator

“I love being able to grow my community on YouTube and Spread positive vibes.”

- Canadian YouTube creator on what they value most about their experience as a YouTube creator

“Giving a voice to a niche audience, cultivating a community that helps people connect all over the world with the same passion. Being able to devote my career to this sustainably in 4 years.”

- Canadian YouTube creator on what they value most about their experience as a YouTube creator

4.1 21 VALUE PROPOSITIONS, 5 META-INSIGHTS, 1 KEY TAKE-AWAY

This report has examined YouTube contributions to Canada’s national media ecosystem, largely told through the perspectives of Canadian YouTube creators and consumers.

Our research was anchored by two surveys. Results have been presented with nearly 50 charts, more than 25 images, as well as quotes from creators and consumers that helped to bring alive the quantitative data.

21 VALUE PROPOSITIONS

Twenty-one value propositions emerged from the research, each suggesting a way that YouTube contributes to the Canadian media ecosystem:

#1 (1.1) BENEFITS AT NO COST TO THE SYSTEM:

The platform is free for creators and consumers, incurring no technological or administrative cost to Canada’s media ecosystem.

#2 (1.2) UNIQUE VALUE CHAIN:

On YouTube, value creation results from its **value chain dynamics**, which tighten linkages between creators and consumers.

#3 (1.3) LIVING LAB:

YouTube might be considered a **living lab** in how content by Canadian creators performs in a global marketplace of open competition.

#4 (2.1) DIVERSITY:

YouTube creators are **diverse** across age, geography, primary language spoken, gender, visible minority, physical disability and Indigenous peoples.

#5 (2.2) CREATIVE ENTREPRENEURS:

YouTube has facilitated the rise of a **new group of 160,000 Canadian creators**, including 40,000 who have achieved sufficient audience traction to monetize their channels.

#6 (2.3) EMPLOYMENT:

Canadian YouTube entrepreneurs are creating employment for themselves and others: nearly **28,000 full-time equivalent (FTE) jobs**, not including labour

on 120,000 channels that are not monetized or spin-off labour such as advertising and talent-management businesses built for the YouTube platform.

#7 (2.4) REVENUE:

While the majority of YouTube eligible creators' channels generate than \$10,000 per year, 15% earn \$50,000 or more annually; 12% earn \$75,000 or more; 9% earn \$100,000 or more; and 6% earn \$150,000 or more (gross revenue).

#8 (2.5) EXPORT:

YouTube is a **free, instant global export instrument**, a service highly valued by Canadian creators, whose goal is to reach global audiences.

#9 (2.5) ACCESS TO GLOBAL MARKETS:

Canadian creators value the access YouTube provides to global audiences. If promotion of content to domestic audiences were to reduce visibility to international audiences, 61% of eligible Canadian creators believe their channels would be impacted negatively.

#10 (2.5) DOMESTIC AUDIENCE:

Canadian YouTube creators report that Canada is their #1 audience, followed by the U.S. and U.K.; France is also a valuable audience.

#11 (2.6) EDUCATION IS A MAIN PURPOSE:

While Canadian creators excel in all YouTube genres, **teaching and inspiring audiences is Canadian creators' highest purpose, after audiences and revenue.**

#12 (2.7) BUILDING COMPETENCIES:

YouTube offers an **array of free services to strengthen the skills of creators** in production (YouTube Space); channel management (Creator Academy); and audience data (YouTube Studio).

#13 (2.8) PATHWAYS TO AND FROM LEGACY MEDIA:

The connections between YouTube and legacy media go two ways; success on YouTube can lead to success on legacy media platforms, and many legacy media creators use the benefits of YouTube.

#14 (3.1) "EASY" AND "CHOICE" ARE THE NEW "KING" AND "QUEEN."

More than three in four Canadians use YouTube, valuing it as a "MeTube" for its personal affordances of being **free, always on, easy to search and its unlimited topics**, rendering "easy" and "choice" as the new "king" and "queen."

#15 (3.2) A UNIQUE MEDIA FORMAT, NEITHER LEGACY NOR SOCIAL MEDIA:

More than half of Canadian YouTube audiences access the platform and the platform's interactive features are also less valued, positioning YouTube between legacy and social media as a **unique hybrid medium without equivalent in the national ecosystem.**

#16 (3.3) DIVERSITY:

Canadian YouTube consumers value the platform's diversity of **genres, perspectives, voices, languages, geographies, genders and ethnicities that are not as visible on other media.**

#17 (3.4) COMPLEMENTARY TO LEGACY MEDIA:

YouTube is not the first place that Canadian YouTube users go for music, entertainment (including long-form narrative, sports, comedy), or news and information, suggesting **YouTube is complementary to legacy media.**

#18 (3.5) YOUTUBE IS THE FIRST MEDIA SPACE WHERE CANADIANS GO TO LEARN:

Seventy percent of Canadian YouTube consumers rank YouTube as the first place they go to learn things.

#19 (3.6) ACCESS TO GLOBAL CONTENT:

65% of Canadian YouTube consumers value **YouTube as the best place to watch the same video as anyone else in the world.**

#20 (3.6) CANADIAN CONTENT:

88% of Canadian YouTube users do not actively seek Canadian content on YouTube, with no significant differences across age or primary language spoken. 80% of Canadian YouTube consumers believe that no government or other organization should determine what they can watch on YouTube.

#21 (3.7) MEDIA DISRUPTION:

Canadian YouTube users **predict their YouTube use will increase** in the next five years, while their **use of legacy media platforms will decline, with the exception of talk radio.**

5 META INSIGHTS

In 5 meta insights, we observed that Canadian YouTube creators and consumers value many of the same YouTube features and services:

#1:

Canadian YouTube creators and consumers value that YouTube's services are **free** and **easy-to-use**.

#2:

Canadian YouTube creators and consumers value YouTube's reach is **borderless** and **global, facilitating access to global audiences and global content.**

#3:

For Canadian YouTube creators and consumers, YouTube is a unique media offering, with **no equivalent in the domestic media ecosystem.**

#4:

Canadian YouTube creators and Canadian YouTube audiences agree that one of YouTube's **key purposes is learning.**

#5:

The **theme of joy** was dominant in both surveys. Canadian creators and consumers appear to be having a great time on YouTube, whether building entrepreneurial businesses from personal passions or watching whatever and whenever they want.

“I have a full-time business doing what I love to do and every day is amazingly fun!”

CANADIAN YOUTUBE CREATOR,
MARCH 2019

1 KEY TAKE-AWAY

For all of YouTube's vastness and complexity, our research suggests a simple logline: YouTube plays a unique and significant role in Canada's media ecosystem. The connection between creators and consumers goes two ways: one to global and global-one.

YouTube, since its launch 15 years ago, is facilitating the rise of a new group of Canadian creative entrepreneurs who are visible on the national and global stage and who are inventing new forms of popular content, resulting in significant outcomes with respect to diversity, employment, domestic popularity, and access to global audiences. YouTube has achieved these results without requiring transfer of IP from creators (including copyright or distribution rights) and largely in the absence of public funding and its associated costs.

4.2. FROM THE ZOO TO OUTER SPACE

Our story of YouTube began with nineteen seconds at the zoo. We close it on a "cosmic" note. In fifteen years, YouTube has become its own media universe, facilitating new screen opportunities for Canadian creators and consumers. Its impact has become astronomical (quite literally) as demonstrated by a YouTube video by Canada's most famous astronaut Commander Chris Hadfield, who grew up on an Ontario farm. "[Space Oddity](#)" combines YouTube's most popular features: science learning, music remix and above all, the authentic personal perspective that is unique to YouTube. On YouTube, connection between creators and consumers is one-to-global, or shall we say, cosmic....



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CHRIS HADFIELD

“SPACE ODDITY”

42,851,139+ VIEWS

As of April 2019

On May 12, 2013, the final day of his final mission, Canadian astronaut Commander Chris Hadfield, who grew up on an Ontario farm, posted YouTube's first music video from space. He recorded it in the International Space Station (ISS) and sent it to Earth, where his son Evan edited and uploaded it (Evan Hadfield runs the successful YouTube channel Rare Earth, that teaches audiences about the world). In YouTube's re-mix tradition, the video is a haunting, lyrical cover of David Bowie's "Space Oddity" starring Hadfield singing and playing guitar, floating through the ISS. By January 11, 2016, the day Bowie died, Hadfield's video had been viewed more than 16 million times and Bowie had said: "It's possibly the most poignant version of the song ever created." "Space Oddity" blends YouTube's popular genres of music remix and science learning in an enchanting alchemy of personal authenticity. By April 2019, Hadfield's awe-inducing video had been viewed nearly 43M times around the world.



RARE EARTH

10.8B VIEWS

24.4M SUBSCRIBERS

As of April 2019

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NOTES ON METHODOLOGY

Our research on YouTube in Canada focused on creators and Canadian audiences. Research reported here is, as far as we can determine, the only survey-based attempt ever undertaken to measure the national profile of YouTube creators and audiences. Most of the knowledge base had to be developed from scratch. A fuller picture would include advertising, music, audiences under 18, experiences of Canadian creators over time, and comparisons with other countries.

Original research for this report included two online surveys that examined the characteristics and experiences of two groups of YouTube users: (1) consumers, and (2) creators. The survey instruments were made available in English and in French. Only adults aged 18 or older were eligible to participate. For both surveys, survey instruments were designed by Ryerson University Audience Lab in consultation with Google Canada, who commissioned [Asking Canadians](#) to carry out the surveys online. The consumer survey was issued to Asking Canadians' own consumer panel, while the creator survey was made available to all Canadian creators via the YouTube Creator Studio homepage. Resultant anonymized data was analyzed by Audience Lab. The research is in compliance with the Ryerson University Research Ethics Board.

There were 1500 participants in the Consumer survey, drawn from a national panel. Only individuals who used YouTube were eligible to participate. The respondent population was roughly comparable to the Canadian population in most key demographic respects. The survey was deployed in the field in November 2018.

The 1268 participants in the creator survey represent a self-selected sample. A link to the online survey was made available on the YouTube Creator Studio home page, with the following script used as an invitation from YouTube to participate:

YouTube creators are creative entrepreneurs, building audiences and revenue through their passion, creativity, hard work and perseverance. However, the YouTube creator community is often not well understood by the entertainment industry or policy makers, and their contributions to the creative economy are frequently undervalued.

We want to change that. In partnership with YouTube Canada, Ryerson University is surveying Canadian YouTube creators to properly measure their contribution to Canada's creative economy. Ryerson will analyze this information and produce a report outlining the economic impact of YouTube and YouTube creators in Canada.

This is the first time anyone has tried to properly understand your immense contribution to Canada's creative economy, and we need your help for this project to be successful. Please take a few minutes to complete the following survey by [Date] so we can fully understand and communicate the various contributions YouTube creators like you make to Canada.

This survey is hosted off of YouTube and is not linked to your YouTube account in any way. All information you provide is anonymous and will only be used for the purpose of assessing the economic and social impact of YouTube and YouTube creators in Canada.

With your help, we can change how YouTube and the YouTube creator community are viewed in Canada.

The Creator survey was deployed in March 2019, with one nudge to Creators sent via email by the YouTube team to boost responses during the week of March 11, 2019. Anonymized responses were delivered to Audience Lab for analysis.

Consumer Survey Demographic Summary

Of the 1500 responses to the Consumer survey, 5.5% of respondents fell into the 18-24 age range, 23.0% in the 25-34 age range, 17.7% in the 35-44 age range, 18.6% in the 45-54 age range, 31.4% in the 55-64 age range, and 3.9% of respondents were 65+. Respondents were required to be at least 18 years old in order to participate in the survey.

The gender self-identification of the respondents was as follows: 51.8% identified as female, 47.6% as male, 0.1% as transgender female, 0.1% as transgender male, 0.1% as other, and 0.3% preferred not to answer.

In terms of location/region within Canada, 29.9% of respondents were located in the West, 38.8% located in Ontario, 18.7% were from French-speaking residents of Quebec and 4.5% were from English-speaking residents of Quebec, 8.1% were located in the Atlantic region, and 0.1% were located in the Territories.

Primary languages spoken at home were classified as English, French, and other. Of the respondents, 71.9% spoke English as their primary language, 19.4% spoke French as their primary language. The remaining 8.7% of respondents fell into the other category, which includes the following languages: Mandarin, Cantonese, Punjabi, Spanish, Tagalog, Arabic, Yoruba, Vietnamese, Urdu, Ukrainian, Turkish, Tamil, Taiwanese, Swiss, Swedish, Swahili, Sinhala, Serbian, Russian, Romanian, Portuguese, Polish, Fula, Persian, Ojibwe, Nepali, Malay, Korean, Kashmiri, Hebrew, Japanese, Italian, Inuktitut, Hungarian, Hokkien, Hindi, German, Gaspesien, Finnish, Farsi, Estonian, Dutch, Czech, Croatian, Creole, Cebuano, Bengali, ChiBemba, and Afrikaans. In terms of secondary languages spoken, 45.4% of respondents noted that they spoke a secondary language.

When asked about annual (pre-taxed) household income, 0.7% of respondents made less than \$9,999.00 annually, 3.6% fell into the \$10,000 - \$24,999 range, 13.2% of respondents made \$25,000 - \$49,999, 16.5% made \$50,000 - \$74,999, 14.5% made \$75,000 - \$99,999, 18.3% made \$100,000 - \$149,999, 14.2% made \$150,000+, and 19% preferred not to answer.

In terms of employment, 56.1% of respondents stated they were employed full-time, 8.1% were employed part-time, and 8.0% were self-employed. Retirees made up 15.5% of respondents, students (full-time and part-time) made up 5.2%, 1.1% were not employed for pay (for example volunteers or unpaid internships), and 1.9% of respondents were caregivers or homemakers (without pay). A further 4.3% of respondents preferred not to answer or specified an "other" job description.

Of all respondents, 70.6% were born and live in Canada, 8.0% were born and live in Canada but have parents who were born elsewhere, 20.4% are permanent residents of Canada, and 1.1% are temporary residents of Canada.

In terms of highest level of education achieved, respondents who had completed a Bachelor's degree made up 29.6% of the total respondent population, while respondents with a professional or graduate degree made up 21.9% and respondents with a college diploma made up 17.5%. Respondents with some college or university experience made up 14.7%, with an apprenticeship or other trades certificate made up 4.3% and a high school diploma/GED made up 8.8%. Of the total population, 1.6% did not complete high school, and 1.6% preferred not to answer.

When asked which ethnicity they most identified with, respondents answered as follows:

	COUNT	%
North American (American (US), Canadian, Caribbean, Jamaican, Mexican)	948	63%
European (British, Dutch, French, German, Hungarian, Irish, Italian, Polish, Portuguese, Scottish, Spanish, Other Central/ Eastern European, Other Western European)	351	23%
Asian (Iranian, Russian, Ukrainian)	22	1%
South Asian (East Indian, Pakistani, Other Southeast Asian)	48	3%
East Asian (Chinese, Filipino, Japanese, Korean, Vietnamese)	152	10%
African	20	1%
Arabic/Middle Eastern	26	2%
I do not identify with any ethnic or racial group	72	5%
Other	55	4%

Creator Survey Demographic Summary

Of the 1268 creator survey respondents, the largest age group represented was the 18-24 year old age group, which included 33% of respondents. The 25-29 year old age group included 13% of respondents, 30-34 years old included 11%, 35-39 years old included 9%, 40-44 years old included 8%, 45-59 years old included 5%, 50+ years old included 9% of respondents, and the remaining 11% of respondents preferred not to answer.

The gender self-identification of the respondents was as follows: 28.9% identified as female, 65.3% as male, 1.5% as non-binary, 1% as other, and 3.2% preferred not to answer.

In terms of location/province within Canada, 12% of respondents were from BC and Alberta respectively, 2% were from Saskatchewan and 3% from Manitoba. Respondents from Ontario made up 47% of total surveyed creators, while 17% of respondents were from Quebec. Of the Atlantic provinces, 2% of respondents were from New Brunswick and Nova Scotia respectively, 1% from Newfoundland and Labrador, and 0% from Prince Edward Island. Of all creators surveyed, 0% of respondents were located in Yukon, Northwest Territories, or Nunavut, while 2% of respondents stated they were located outside of Canada.

In terms of other identifying characteristics, creators surveyed included 18% who identified as visible minorities, 9% who identified as people with disabilities, 3% who identified as indigenous and 16% who preferred not to answer. Fifty seven percent of creators surveyed answered that they identified with none of the above.

Calculating FTE Jobs

Calculation of the total amount of Canadian YouTube creators was based on the estimation that there are currently 40,000¹⁶ eligible Canadian YouTube creators (Canadian creators with over 1k subscribers). The Creator survey determined 25% of respondents were classified as eligible, allowing us to estimate a total of 160,000 Canadian YouTube creators in total (eligible and ineligible combined).

Calculation of the amount of FTE jobs in the YouTube creator field was based on the same estimation of 40,000 eligible Canadian YouTube creators which was then used in calculations based on data from three of our creator survey questions.

In order to determine how many eligible Canadian YouTube creators work full-time (or full-time equivalent) we took the responses from the following survey question, and reduced the number of responses of the part-time category to 1/5th (0.2) of the total responses in this category to reflect 8 hours of work per week (the lowest number of hours worked per week that would qualify the creator for this category).

**Survey Question: How much time do you spend working as a YouTube Creator?
(Select your best estimate)**

- *Full-time (37 hours or more per week)*
- *Part-time (8 - 36 hours per week)*
- *A few hours a month or less*
- *Don't know*

Of the 40,000 eligible creators, 28% of eligible creators' responses indicated they worked full-time (28% x 40,000 = 11,200 FT jobs), and 57% of eligible creators' responses indicated they worked part-time (57% x 40,000 x 0.2 = 4,560 FTE jobs). Thus we estimate that there are a total of 15,760 FTE jobs held by eligible Canadian YouTube creators.

To determine how many ancillary jobs are created by eligible Canadian YouTube creators hiring other people to work on their channel, we started with the same base estimation of 40,000 eligible Canadian YouTube creators, and then using the data from the survey question below, multiplied this number by the percentage of eligible Canadian creators who do employ others (20%). This calculated the estimated number of eligible Canadian creators who employ others to be 8,000.

Survey Question: Do you employ other individuals to assist you with your channel?

- *No*
- *Yes*

A follow up question (below) was then asked of respondents who answered that they do in fact employ other individuals to assist with their channel. In addition to asking how many people they employ, the question also asked if these employees were full-time, part-time, or freelance/occasional.

**Survey Question: Roughly how many people do you employ and what is their status?
(select all that apply)**

- *1 person*
- *2-5 people*
- *6-10 people*
- *Over 10 people*
- *Not applicable*

In order to estimate the total number of FTE jobs created by eligible Canadian creators who employ others, we multiplied the total number of eligible Canadian creators who hire others (8,000) by the percentage of responses in each category of the above survey question. We then multiplied this number by the lowest number of people per category (ex. for a response in the 6-10 people hired category, we multiplied by 6), and then took 1/5th (considering 8 hours as the lowest amount of part-time work as per the calculation above) of this number so that our estimates were as conservative as possible. Thus, we estimate that 9,944 full-time jobs and 2,229 FTE jobs (11,144 part-time jobs), a total of 12,173 FTE jobs, are created by eligible Canadian creators who employ others. This calculation plus the original amount of FTE jobs calculated to be held by eligible Canadian creators themselves gives us a total number of 27,933 FTE jobs created (15,760 FTE eligible Canadian creator jobs + 12,173 FTE jobs created by eligible Canadian creators = 27,933 FTE jobs held by eligible Canadian creators and their employees).

In closing, we would like to re-emphasize the deliberately narrow scope of this report. To comprehensively understand the value of YouTube in the Canadian media ecosystem, additional arenas of YouTube that might be examined include advertising; music; and audiences under 18, each arena requiring the design of appropriate research protocols to facilitate evidence-based research.

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