

facebook

Connecting benefits

How social networking supports Australian small businesses and communities

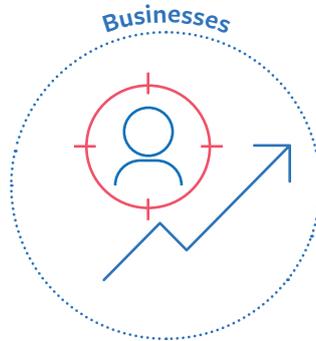
August 2018



Report prepared by PwC Australia

Snapshot

This report explores some of the economic and social benefits of using Facebook from the perspective of small and medium sized businesses (SMBs)¹ in Australia and local communities.



Helping businesses reach relevant customers, locally and internationally, allowing them to grow organically and employ more people



Facebook provides a platform for Australians and Australian businesses to **connect**

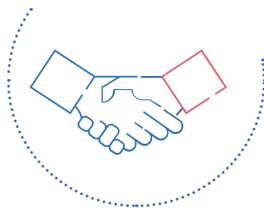
Small and medium sized businesses in Australia

facebook

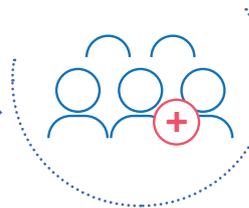
58%
of SMBs

or approximately 480,000 have a Facebook Page in Australia

excludes sole traders and holding companies



57% of SMBs with a Facebook Page have **hired more staff** as a result of the growth they have experienced aided by Facebook



In 2017, aided by their growth from using Facebook, SMBs in Australia hired approximately **120,000 employees**



Approximately **\$16.8 billion** in additional economic value (GVA) was generated by these additional employees in 2017



Australians spent an estimated **\$2.1 billion** in 2017 on purchases from a business of any size after seeing an advert or promotion on Facebook



An estimated **8.2 million Australians** have purchased from, or visited, an SMB after seeing content relevant to the business on Facebook



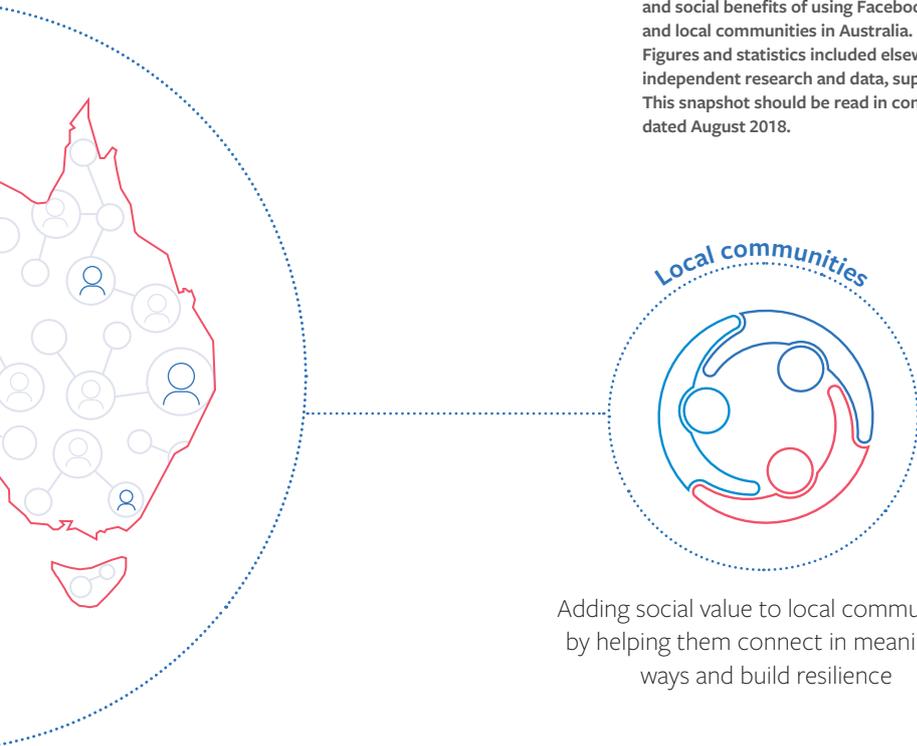
35% of Australian SMBs exported to foreign markets in 2017
80% of which had a Facebook Page

In regional Australia in 2017 this accounted for...

approximately **34,800 employees** hired by SMBs

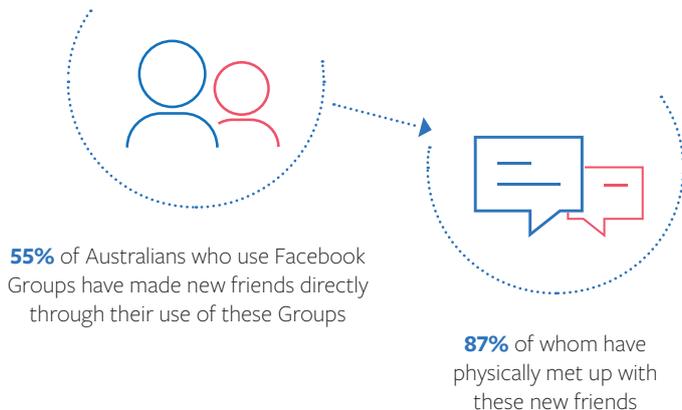
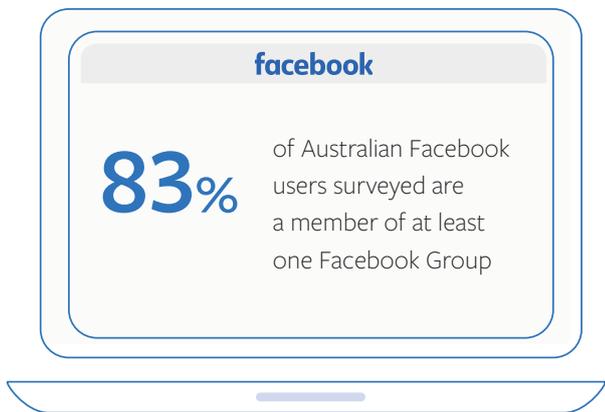
who generated approximately **\$4 billion** in additional economic value (GVA)

This report is prepared by PricewaterhouseCoopers Consulting (Australia) Pty Ltd to explore the economic and social benefits of using Facebook from the perspective of small and medium sized businesses (SMBs) and local communities in Australia. References are not provided within the snapshot or executive summary. Figures and statistics included elsewhere in the report without specific referencing are based on PwC's independent research and data, supplemented by the use of third party sources (referenced throughout). This snapshot should be read in conjunction with the full report "Connecting Benefits" by PwC Australia, dated August 2018.

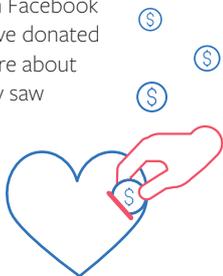


Adding social value to local communities by helping them connect in meaningful ways and build resilience

Communities in Australia



23% of Australian Facebook users surveyed have donated to a cause they care about through a link they saw on Facebook



This led to approximately **\$475 million** donated by Australians in 2017

Facebook Safety Check has been activated **23 times** by Australian communities since it was introduced in August 2016



of these times were in regional Australia

85% of Facebook users in regional Australia use Facebook Groups, compared to **82%** in metropolitan Australia

56% of Facebook users in regional Australia have purchased something from another user through Facebook, compared to **43%** in metropolitan Australia



Executive summary

Online platforms such as Facebook connect people with friends, families, governments, not-for-profits (NFPs) and organisations of all sizes. However, these online platforms have evolved into something far more than a place to share photos and updates. The platforms of today allow users, both individuals and businesses, to share live content, accept payments, sell products, and communicate instantly.

This report provides a framework for analysing both the economic and community benefits from using Facebook in Australia, taking into account the commercial and non-commercial uses of the platform. However, the breadth of interactions through Facebook means a single measure of the social and economic impact is not possible as many social outcomes are quantified by activity rather than a financial metric. Instead, this report profiles some of the measurable benefits of Facebook and highlights two key outcomes from the adoption and use of online platforms such as Facebook and Instagram:

- the overcoming of barriers and leverage of free trade agreements to help SMBs grow, employ more people, and generate economic growth

- the building of resilient communities through forming new friendships, enabling donations to charitable causes and providing support in times of adversity.

Online services, particularly Facebook and Instagram, are becoming increasingly popular in Australian society and are allowing SMBs to connect with customers and grow revenues, both locally and internationally. This enables existing businesses to grow and new businesses to be built creating new employment opportunities. From these additional employees, approximately \$16.8 billion in economic value (GVA) was generated in Australia in 2017, with \$4 billion (24 percent) of this GVA generated in regional Australia.

Using online services such as Facebook and Instagram to engage with customers and promote a brand removes many of the geographical barriers that traditional brick-and-mortar businesses face. This is important in Australia for two reasons:

- It allows small businesses in regional areas of Australia to access the larger markets of the state capital cities
- It helps to provide low-cost access to global markets, allowing a business to seek international demand for their products or services at an early stage of the business lifecycle.

The top regional area in terms of employment and economic growth from SMB use of Facebook is the Gold Coast. In 2017, SMBs on the Gold Coast hired approximately 3,200 additional employees as a result of their growth aided by their use of Facebook, generating \$450 million in economic output (GVA). Elsewhere in regional Australia, Newcastle/Lake Macquarie and the Sunshine Coast saw around 1,900 employees hired in 2017 by SMBs due to the growth they experienced, in part from using Facebook.

These growth opportunities have led to a relatively new phenomenon of local businesses pursuing international sales at an early stage, which has been coined 'born global'. Over a third (35 percent) of Australian globally active businesses now earn international revenue within two years of establishment.

This is a momentous shift in export dynamics and a long way from traditional business models where a business would only venture into foreign markets once it had established itself domestically. In 2017, 35 percent of Australian SMBs exported to foreign markets, and 80 percent of these had a Facebook Page.

The online engagement around businesses and products has also had a positive economic impact when it comes to driving consumer purchasing.



In 2017, over half of Australian Facebook users surveyed purchased something from a business (of any size) after seeing an advert or promotion on Facebook. This accounted for sales of nearly \$2.1 billion, however, as brands typically use multi-channel approaches it is not possible to attribute this entirely to Facebook. In Australia, an estimated 8.2 million Facebook users have purchased from, or visited an SMB after seeing content on Facebook that is relevant to the business.

Platforms such as Facebook also connect individuals and help them to build resilient communities, generating social value. At its core, Facebook operates as a platform for individuals to connect with their friends and family, or with people who share a common interest or characteristic (e.g. a common cultural background, living in the same location or an interest in a particular hobby). It provides people with the ability to connect with others, share ideas, photos, videos, or content relevant to their common interest. Quantifying one figure for the social impact of Facebook is not straightforward as every user's experience is unique. Therefore the analysis quantifies three social uses of the platform:

- 1 Communication** – 83 percent of Australian Facebook users surveyed use Facebook Groups. Of this, 55 percent have formed new friendships through these Groups, and 87 percent of these have physically met up with these new friends.
- 2 Philanthropic awareness** – 23 percent of Australian Facebook users surveyed have donated to a cause they care about through a link they saw on Facebook. With an average annual donation of \$140 per person, this equates to around \$475 million donated by Australians in 2017.
- 3 Support in adversity** – Facebook Safety Check has been activated 23 times by Australian communities and many millions of Australians have marked themselves as safe.

Our research has also uncovered the stories of social entrepreneurs who are using Facebook and Instagram to launch their ideas and calls to action. For example:

- **Mama Tribe**, a Facebook Group established to help support new and existing mums. In a little over a year, they have built a support network of over 35,000 mums, helping women throughout Australia in their times of need (see Case Study 2).

- Facebook and Instagram have helped to spread the word of **Take 3 for the Sea**, an environmental group that encourages people to collect rubbish from public spaces. The idea began in Bateau Bay, NSW, but the research shows their Instagram hashtag has now been used in 129 different countries. Although only active for nine years, it is having a profound impact educating people on the issue of plastic pollution in our oceans (see Case Study 3).
- **Football Without Borders** is a small Facebook Group, based in Darwin, that organises football matches for asylum seekers, refugees and new migrants so they can engage with the local community. This Group has fewer than 300 members yet they have regular football players from 25 different countries, many of whom have left their homes due to extreme circumstances.

Overall, the internet reflects, accelerates and amplifies both the good and the bad in society. While it is often the negative that draws public attention, the positives generated by online platforms can, at times, be overlooked. This report provides an overview of some of these positive contributions.



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01

Social networking in Australia

Advances in technology lie at the core of the ‘innovation boom’. However, it is a technology that has been a part of our lives for close to twenty years – online social networks – that are encouraging Australians to follow their passions in business and in the community.

Social networking has transformed significantly in the past decade, becoming more dynamic due to updates and advancements in mobile technology, allowing us to communicate and share content whilst on the move. During this transformation, social networking platforms have attracted a wider audience of individuals and businesses who enjoy the many benefits they bring. Although some have a preferred social network, it is common for users, both individuals and businesses, to have profiles across several platforms to take advantage of each of their unique features, so called multi-homing.

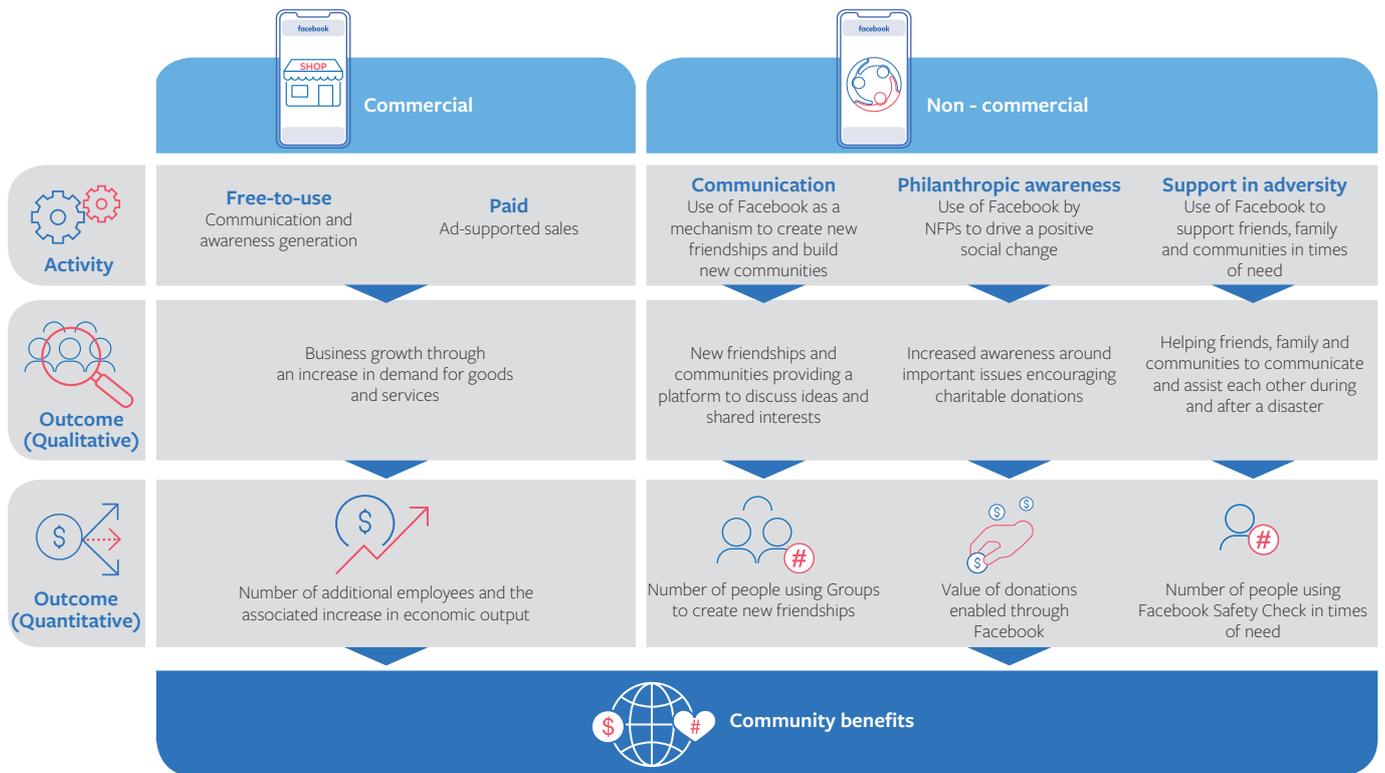
New technologies have created a range of features that allow individuals and businesses to share live content, accept payments, sell products, and communicate instantly. These new tools help to dissect a global audience into smaller communities based on specific and relevant attributes or interests. The increased functionality and capabilities now see many social networks operating as multi-sided platforms, connecting private users with other users, advertisers with buyers, and businesses with both existing and potential customers.

The breadth of these interactions means that a single measure of the economic and social contribution is not possible. Specifically, while it is somewhat easier to understand the economic benefits of commercial activities derived by the use of Facebook, the broader social interactions tend to be measured by activity.

Ultimately, as demonstrated in Figure 1, the community’s benefit from social networking is derived from both commercial and non-commercial activities. Some of the impacts can be measured in dollar terms, but there are some which are not so easily converted to financial metrics. The framework does not represent the complete range of social and economic benefits that could be attributed to Facebook, but rather focuses on the matters considered in this report. Section 2 of this report analyses the commercial impact from SMBs using Facebook, and Section 3 explores the non-commercial impacts on society.

The speed at which all online industries are developing is driving innovation for the benefit of consumers, leading to increased living standards. However, with this pace comes the challenge of staying ahead of bad actors on internet platforms. To achieve the economic and social benefits outlined above, social networking platforms are having to ensure that they work to address concerns around privacy, safety and security, and address challenges such as platform integrity.

Figure 1 – Framework for assessing the community benefits of Facebook



Source: PwC

Social networks are a key channel for SMBs to connect with consumers

Around half of all Australian SMBs now have a presence on social networking platforms, including those with a free-to-use profile, and those that pay to advertise. Considering just 15 percent of SMBs had a presence on social networks in 2011, there has been an impressive uptake over the past seven years as more businesses realise the benefits from online visibility.² PwC estimates this to increase to nearly 70 percent in the next five years.

Of those SMBs with a presence on social networking platforms, 90 percent of small businesses, and 87 percent of medium sized businesses have a Facebook Page (see Figure 2). However, much like individual users, it is common for SMBs to have profiles across multiple social networking platforms, including for example Twitter and YouTube, to reach a wider audience and take advantage of the functionality of each.

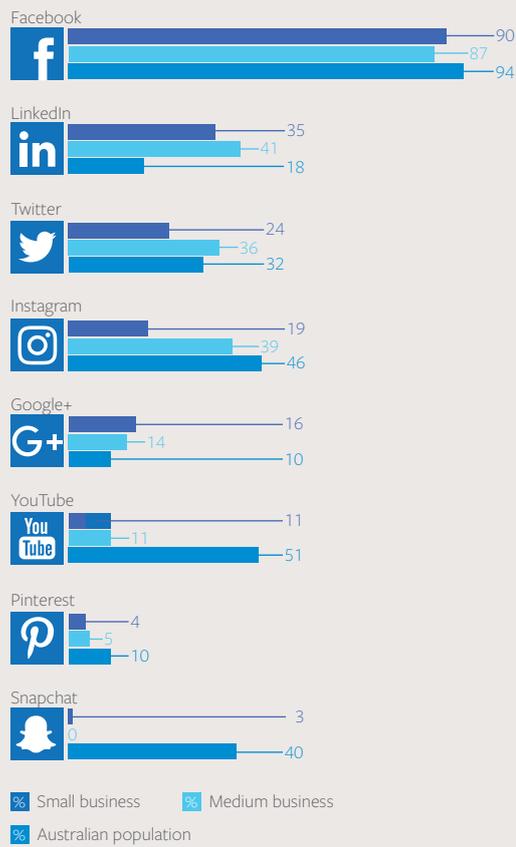
There are five core reasons SMBs are using social networking platforms:

- advertise to potential customers
- share information on products and events
- access new markets (domestically or internationally)
- drive traffic to their own website
- understand and communicate with their consumers.

Social networks are not just a tool for established businesses; a growing number of entrepreneurs are starting their businesses directly on social networking platforms due to the lack of barriers. Indeed, over a third of Australian SMBs that have a Facebook Page built their business on Facebook.³ The lack of a need for a brick-and-mortar store means minimal investment is required to begin trading, and the ease of reaching markets further afield, even internationally, allows entrepreneurs to target a global (i.e. larger) market rather than simply a local one.



Figure 2 – Social networking presence of those using social media ⁴



Source: Sensis (2017)

Nearly 60 percent of Facebook users are using Facebook Messenger to contact businesses rather than through email or phone calls⁵

Connecting the Australian population through social networks

The use of social networks is increasing. In Australia nearly 80 percent of the population now uses social networking of some form, up from 70 percent in 2016.⁶

Figure 2 compares the social networking presence of Australians against the presence of small and medium sized businesses, for those that use social networks. Of the platforms that Australians use, Facebook and Instagram are a popular choice and have high usage across all age groups.

While it is no surprise that those aged under 30 are the most active users of social networking sites, the evidence does show the elderly population is engaging. Nearly a quarter of the Australian

population aged over 65 check social networking sites at least once per day, with the primary reason of catching up with friends and family.⁷

The most common reasons for people to use social networking platforms have remained constant over the past seven years – to catch up with family and friends, and to share photographs and videos.⁸ However, as these platforms have evolved, there are a growing number of reasons for people to log in. Section 3 of this report looks at these trends in more detail, and specifically at how Facebook enables its users to find their relevant online communities, create new friendships, engage with issues they care about, and help communities in times of need.

02

Removing barriers to help businesses find relevant consumers

Facebook is helping businesses of all sizes reach relevant consumers, locally and internationally. This opens up new markets at an earlier stage of the business lifecycle, enabling cross-border trade, allowing the business to grow organically and employ more people. An increase in employment generates economic growth, benefiting the wider community.

Key findings⁹



Approximately
480,000
Australian SMBs have a
Facebook Page, equivalent
to **58%** of SMBs



57% of these SMBs have hired more staff
aided by the growth they have experienced from
using Facebook, accounting for the employment
of approximately **120,000** full time
equivalent staff in 2017

29% of whom were in regional
areas of Australia

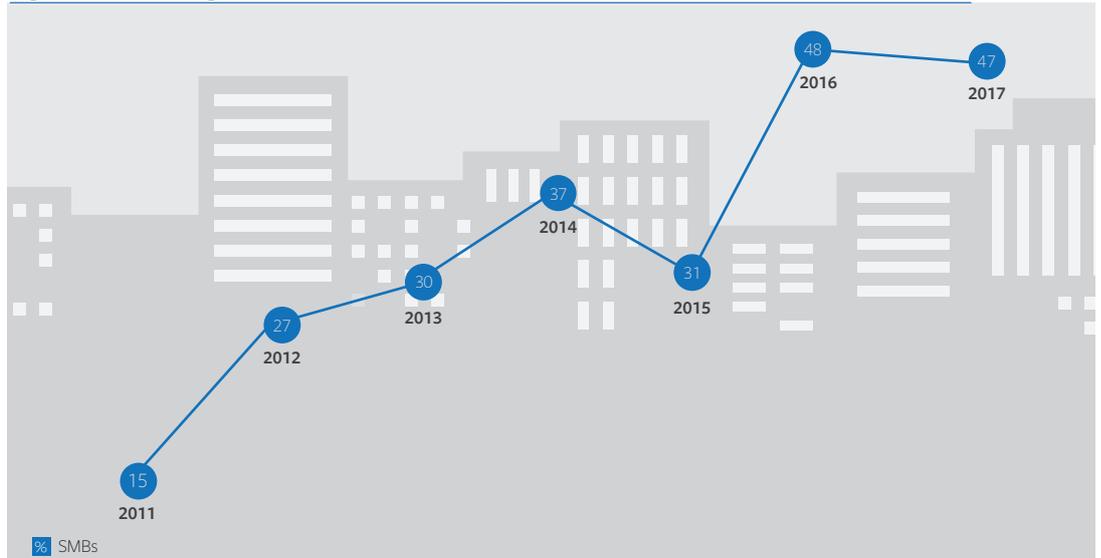


Approximately
\$16.8 billion
in additional economic value
(GVA) was generated by these
additional employees in 2017

24% was generated
in regional areas of Australia

Source: PwC analysis of Morning Consult SMB survey (2017)¹⁰ and ABS (2017a). Employment and economic output estimates based on data contained within PwC's Geospatial Economic Model (GEM)

Figure 3 – Percentage of Australian SMBs with a presence on social networks



Source: Sensis (2017)

Australian SMBs on Facebook

SMBs are a vital component of the Australian economy, employing more than two-thirds of all workers. The Australian Government has a range of support mechanisms, for example grants and tax breaks, to ensure small businesses continue to flourish, promoting healthy competition. As discussed in Section 1, another resource that new and existing SMBs are turning to are social networking platforms, either on a free-to-use basis, or through paid advertising.

Figure 3 shows Sensis' estimates of the percentage of SMBs using social networks, increasing from 15 percent in 2011, to around 50 percent in 2017. PwC's analysis of a Morning Consult Survey (2017) using their Geospatial Economic Model (GEM) suggests this is understated, and that 58 percent of Australian SMBs now use Facebook.

The monetary costs for a business switching between competing social networking platforms is zero, leading many companies to have profiles across various platforms. With that said, Facebook is the most popular choice, with nearly 90 percent of SMBs that use social networking platforms having a Facebook Page for their business.¹¹

Figure 4 shows the proportion of SMBs using Facebook by industry, with a comparison against the UK and the US, which both have a similar adoption rate of Facebook amongst SMBs. Certain industries have a higher usage of Facebook, especially companies in the hospitality or retail sector, which typically have business-to-consumer business models where Facebook is used as a tool to connect with customers.

Australian SMBs' adoption of Facebook seems to be significantly lower in the technology and construction sectors relative to these industries in the UK and the US. It is possible to hypothesise that these Australian SMBs are not making full use of online visibility through social networks. This is especially true for the construction sector, where Australia has a higher proportion of businesses within this industry compared to the US and UK.¹² PwC's study, in 2015, found that if:

- the construction sector properly utilised internet and mobile technologies, it would add a \$4.2 billion boost to the national economy over the next 10 years
- the professional, scientific and technical services industry (closely linked to Morning Consult's 'technology' industry) properly utilised internet and mobile technologies, it would add a \$3.7 billion boost to the national economy over the next 10 years.¹³

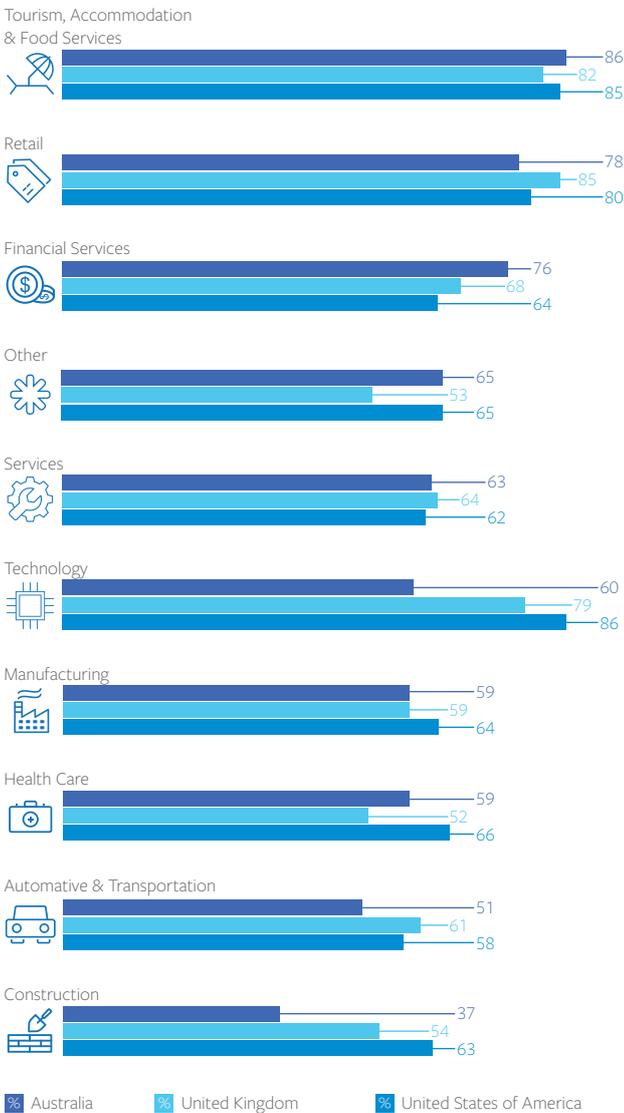
Social networking platforms offer affordable advertising for SMBs

The advertising industry has experienced a major transformation with the adoption of the internet, changing the way people access and absorb information. Thirty years ago, advertising was expensive and confined to print, TV, radio and billboards. In the last year, online advertising spend grew over 10 percent and now accounts for nearly half of advertising spend in Australia.¹⁵ Advertising through social networking is just one of these marketing channels that has arisen from the internet.

Through advertisements on social networks, consumers are introduced to a range of new businesses and products that are now able to compete against larger businesses. The typically higher costs of traditional advertising may not be a viable option for smaller businesses, however advertising on social networks offers more flexibility for lower budgets. This provides businesses with a more affordable and accessible way to reach consumers within their target market, regardless of how long they have been trading. In Australia, over 350,000 businesses (of all sizes) spent less than \$130 (\$100 USD) through advertising on Facebook in 2017.¹⁶

This structural change has transformed the way brands go to market. Considering that over 80 percent of people use a smartphone to access Facebook,¹⁷ companies are having to adapt their go-to-market strategies to have content that is easily digestible through the smaller screen on a smartphone. The results indicate this has been successful. In 2017, over half of Australian Facebook users purchased something from a business (of any size) after seeing an advert or promotion on Facebook. This accounted for sales of nearly \$2.1 billion,¹⁸ however, as brands typically use multi-channel approaches it is not possible to attribute this entirely to Facebook.

Figure 4 – Proportion of SMBs using Facebook by industry¹⁴



Source: Morning Consult SMB survey (2017)

Sensis have found, since 2013, the proportion of large Australian businesses (i.e. employment of 200 or more persons) advertising on social networking platforms has increased marginally, however, the proportion of SMBs using these platforms to advertise has more than doubled. In 2017, over a quarter of small businesses, and 35 percent of medium sized businesses in Australia paid to advertise on social networking platforms.

The advertising capabilities of social networking platforms mean a business can increase the likelihood of the right customer seeing their products, thereby optimising marketing spend and return on investment. For example, a small business could run two separate adverts simultaneously and monitor the performance of each, ultimately phasing out the least successful. For start-ups and young businesses this is often a more attractive offering than traditional marketing methods which require more upfront investment. These techniques appear to work, with an estimated 8.2 million Australians having purchased from, or visited an SMB after seeing content on Facebook that is relevant to the business.¹⁹

SMBs are finding a global consumer base through social networking platforms

Consumers from all around the world are connecting with Australian businesses through Facebook. The latest data shows approximately 210 million people from around the world are connected on Facebook to a business of any size in Australia.²⁰ The majority of people are from the USA, UK, Canada, India and Pakistan, with both the US and UK in the top five destinations for exports from Australia.²¹

Using social networking platforms to advertise and promote a brand removes many of the geographical barriers that traditional brick-and-mortar businesses face. This is important in Australia for two reasons:

- It allows small businesses in regional areas of Australia to access the larger markets of the state capital cities
- It helps to provide low-cost access to global markets, allowing a business to seek international demand for their products or services at an early stage of the business lifecycle.

This relatively new phenomenon of pursuing international sales at an early stage has been coined 'born global'. Just over a third (35 percent) of Australian globally active businesses now earn international revenue within two years of establishment.²²

This is a momentous shift in export dynamics and a long way from the traditional business models where a business would only venture into a foreign market once it had established itself in its domestic market. This is important as it provides SMBs with a way to support their growth plans if demand in their local market is insufficient. Nonetheless, rather than targeting new consumers in countries all over the globe, these new exporters are deploying a more tactful strategy, with 59 percent of exporting firms trading in just one or two other countries.²³

In 2017, 35 percent of Australian SMBs exported to foreign markets, and 80 percent of these had a Facebook Page.²⁴ In terms of the overall number of exporters, 88 percent of goods exporters in Australia are SMBs, however, collectively this accounts for just five percent of the value of goods exported from Australia.²⁵ Despite the low gross value of exports by SMBs, they are of no less importance given the majority of the Australian population relies on SMBs for employment.

Economic impact of SMBs using Facebook

As a platform for businesses and consumers to engage directly online, Facebook has supported Australian SMBs to grow their market reach and sales, consequently employing more people and generating an increase in economic output.

Figure 5 provides a summary of the economic impact of SMBs' usage of Facebook in terms of employment and economic output (Gross Value Added, GVA).

Key finding 1



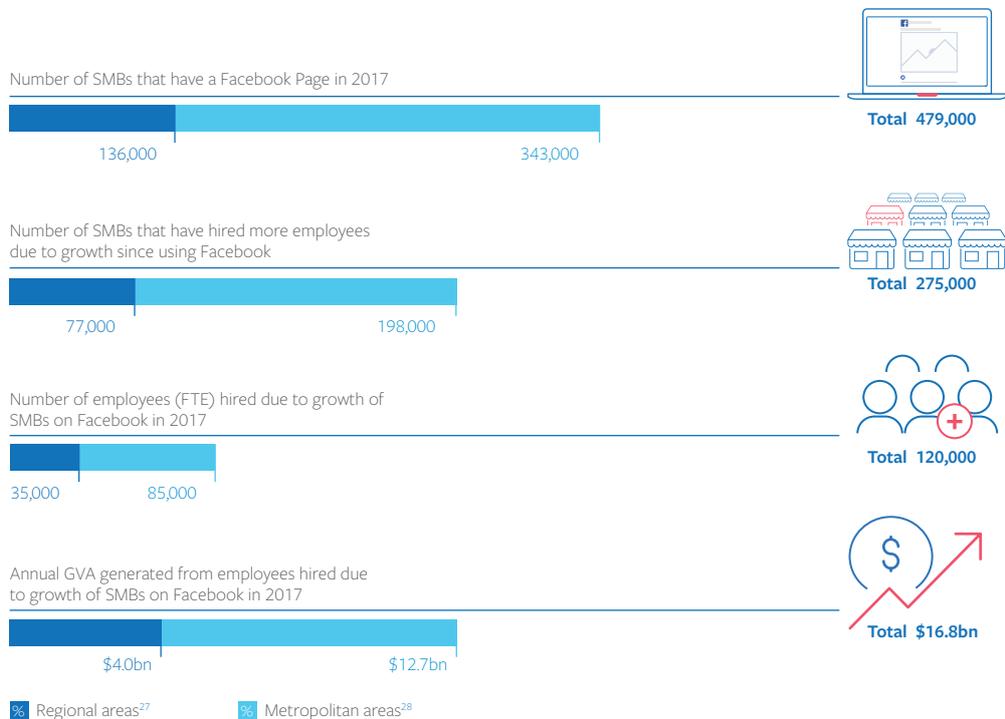
Approximately 480,000 SMBs have a Facebook Page

PwC's analysis shows 58 percent of Australian SMBs have a Facebook Page, equal to around 480,000 SMBs. In metropolitan regions of Australia, 61 percent of SMBs have a Facebook Page, compared to 52 percent of SMBs in regional Australia, although there are some clusters of high usage in regional areas.

Across Australia, the areas with the highest proportion of SMBs with a Facebook Page are dominated by the metropolitan areas of Sydney and Brisbane, with between 63 and 66 percent of SMBs having a Facebook Page. The various areas of Melbourne have somewhat lower adoption rates, with around 58 percent of SMBs having a Facebook Page.

In regional Australia, the areas with the highest proportion of SMBs using Facebook are located in Queensland and New South Wales (NSW). The top two regional areas are Newcastle/Lake Macquarie, and Illawarra (Wollongong) – both situated in NSW. The data suggests a high usage of Facebook by SMBs along the entire 250-kilometre stretch of coastline from Newcastle to Wollongong – including Sydney. In regional Queensland, the Gold Coast and Sunshine Coast have the highest rates of Facebook usage by SMBs.

Figure 5 – Overview of economic impact and SMBs' usage of Facebook in Australia ²⁶



Note: Approximate figures shown. Numbers may not add up due to rounding.
 Source: ABS (2017a), Morning Consult SMB survey (2017), PwC's GEM

Key Finding 2



57% of these SMBs have hired more staff aided by the growth they have experienced from using Facebook, accounting for the employment of approximately 120,000 full time equivalent staff in 2017

A third of SMBs using Facebook in Australia increased their headcount in the six months to December 2017, and 38 percent said they would increase their number of employees in the following six months.²⁹

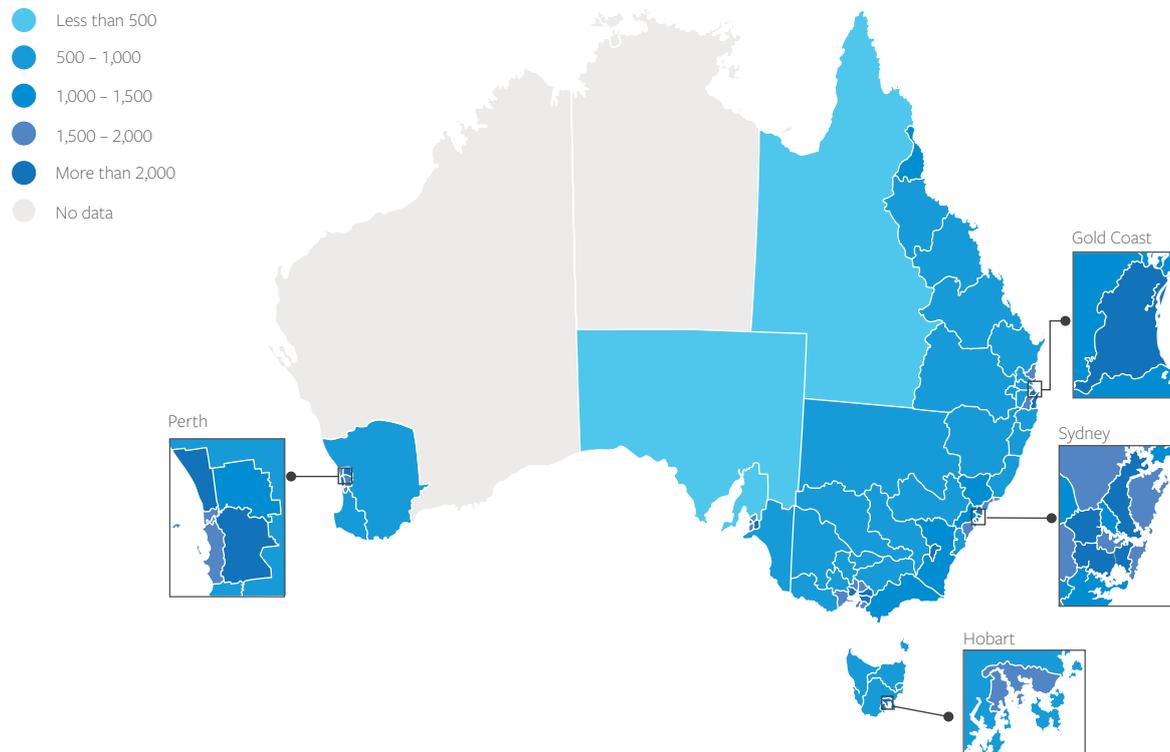
Facebook has played a role in this, connecting businesses to local, national and international markets, allowing businesses to expand their reach and enjoy the associated benefits like increased sales and revenue growth. Specifically, 57 percent of SMBs on Facebook have hired more employees due to the growth in demand for their products and services since they first joined Facebook. Furthermore, of these businesses, over 70 percent

said they have used Facebook to find suitable employees by posting job vacancies on their Page.³⁰

By enabling Australian SMBs to access new markets and expand their sales, Facebook has supported the creation of new jobs and employment. PwC's analysis of the Australian market shows approximately 120,000 employees (full time equivalents, FTEs) were hired in 2017 aided by the growth of SMBs from using Facebook.³¹ Almost a third (29 percent) of this came from regional Australia.

Figure 6 illustrates the number of employees hired in 2017 by SMBs aided by their use of Facebook.

Figure 6 – Number of employees in SMBs hired due to growth of the business from using Facebook in 2017



Source: Maps prepared using PwC's GEM, SMB counts and employment numbers as at June 2016 sourced from ABS, Facebook use by SMB sourced from Morning Consult SMB Survey (2017)

Figure 7 – Top 10 areas for employment due to the growth of SMBs following their use of Facebook in 2017

	Area	Employees hired in 2017 (FTE)
1	Melbourne – Inner City	6,523
2	Sydney – City and Inner South	5,735
3	Melbourne – South East	3,632
4	Sydney – North Sydney and Hornsby	3,328
5	Gold Coast	3,187
6	Sydney – Inner South West	2,717
7	Brisbane – Inner City	2,611
8	Perth – North West	2,550
9	Melbourne – Outer East	2,545
10	Melbourne – Inner South	2,477

Highlighted rows indicate regional areas

Source: ABS (2017a), Morning Consult SMB survey (2017), PwC's GEM

SMBs in the inner city areas of Melbourne and Sydney accounted for the greatest employment in the past year due to SMB growth aided by the use of Facebook (Figure 7). The Gold Coast stands out as the top regional area with nearly 3,200 employees hired in 2017, which is higher than the inner city areas of both Perth and Brisbane. Elsewhere in regional Australia, Newcastle/Lake Macquarie and the Sunshine Coast have the next highest employment from SMB growth aided by Facebook, both with around 1,900 employees hired in 2017.

The Gold Coast is a hub of small business, with an average of 2,700 small businesses started each year, or around seven per day.³² Over 14,000 SMBs on the Gold Coast have a Facebook Page – approximately 62 percent of all SMBs located within the area. In terms of industries, retail trade and accommodation and food services account for over 20 percent of employment on the Gold Coast.³³ These are the two industries with the highest rates of Facebook usage by SMBs, as shown by Figure 4, potentially a leading cause for the significant number of employees hired on the Gold Coast aided by SMBs' growth from using Facebook.

Evolve Skateboards provides an example of a new business from the Gold Coast using Facebook and Instagram to promote their brand, increasing sales domestically and internationally (see Case Study 1). This growth has allowed them to expand their team, now employing 15 people in their headquarters on the Gold Coast, four in the United Kingdom, and two in New Zealand.

Nationally, Hobart has the highest proportion of SMBs that have employed more people due to the growth of their business from using Facebook. It is worth noting that Hobart has a relatively low number of SMBs, therefore this only accounts for around 730 employees hired in 2017. Economic growth in Hobart has been improving in recent years, driven by the tourism sector experiencing record numbers of visitors.³⁴ Given SMBs in the tourism, accommodation and food industry are some of the biggest users of Facebook, it suggests local businesses in this industry are capturing the growing market through their use of Facebook.



Going global

Case Study 1 Evolve Skateboards

Founded:
2011, Gold Coast

Founders:
Jeff Anning and
Fleur Anning

Jeff and Fleur, the founders of Evolve Skateboards, discovered electric skateboards when someone glided past them at home on the Gold Coast. Newly inspired, Jeff purchased one online. Six weeks later, a heavy, clunky skateboard arrived at their home, and despite the excitement, they felt they could do better.

Fleur and Jeff were so confident about their idea to design an electric skateboard based on a high performance longboard that they sold their family home to fund the first production. The business began on Facebook and YouTube, using the platforms to share photos, videos and news, before opening their website prior to launch. The first batch sold out in two weeks, with orders from all around the world. In a short space of time, Fleur and Jeff had started Evolve Skateboards - already an international business.

Now in its seventh year of operating, Evolve Skateboards uses Facebook and Instagram to drive brand awareness, announce events and new products, share educational content and to advertise to potential customers. Interestingly, customers have independently created Facebook Groups as online communities where they organise group rides with other people that share an interest in the Evolve brand.

When launching new products, Facebook and Instagram are their core channels. During the launch of the best-selling 'GT' model, they released a series of teaser videos and posts solely on Facebook and Instagram. They sold out within 24 hours, with net sales of over \$1 million. This success has allowed them to expand their team, now employing 15 people at the Gold Coast headquarters, with a further four in the UK and two in New Zealand.

Seventy percent of Evolve's sales come from around 30 international markets, and at any one time, they are pursuing two or three other markets through their Instagram and Facebook Pages. Their success has been noticed, with the company winning several awards including 'Queensland Exporter of the Year' at the Premier of Queensland's Export Awards in 2017.

Looking ahead, Evolve Skateboards has ambitions to use Facebook and Instagram to enter new markets such as Japan, Canada and Spain, whilst continuing to grow the brand in New Zealand and the UK. Their network of distributors are focusing on the US, Europe and several Asian countries including South Korea and Singapore.



Source: Evolve Skateboards

Key Finding 3



These employees generated approximately \$16.8 billion in additional economic value in 2017

By enabling SMBs to grow and create additional employment, Facebook has supported the generation of approximately \$16.8 billion of economic value in Australia in 2017.

Figure 8 provides a list of the top 10 areas of Australia with the highest economic growth in 2017 generated by the employees hired aided by SMBs' growth from using Facebook. Once again, the Gold Coast is the only regional area that features on this list. The next highest regional areas are Newcastle/Lake Macquarie, and the Sunshine

Coast, each with around \$250 million in economic growth, and then Hunter Valley (excluding Newcastle) and Illawarra, both with economic growth in the region of \$160 million. Overall, roughly a quarter (\$4 billion) of the economic growth, attributable to the growth of SMBs from using Facebook, is in regional Australia.

Figure 8 – Top 10 areas for economic growth from employees hired due to the growth of SMBs from using Facebook in 2017

Area	2017 GVA (in 2015 AUD millions)
1 Sydney – City and Inner South	1,159
2 Melbourne – Inner	1,033
3 Sydney – North Sydney and Hornsby	638
4 Gold Coast	458
5 Melbourne – South East	453
6 Brisbane – Inner City	438
7 Perth – South East	437
8 Perth – Inner City	434
9 Perth – North West	400
10 Australian Capital Territory	383

Highlighted rows indicate regional areas

Source: ABS (2017a), Morning Consult SMB survey (2017), PwC's GEM

62%

Over **14,000** SMBs have a Facebook account on the Gold Coast, approximately 62 percent of all SMBs located within the area

Around **3,200** people have been employed on the Gold Coast in 2017 from the growth of SMBs aided by Facebook

The Gold Coast has consistently stood out as a regional area of Australia that is benefitting from SMBs use of Facebook

The additional employees hired on the Gold Coast due to the growth of SMBs aided by their use of Facebook generated over **\$450 million** in economic output in 2017

An average of **2,700** small businesses (i.e. 1-19 employees) are started on the Gold Coast every year



Source: Mama Tribe

03

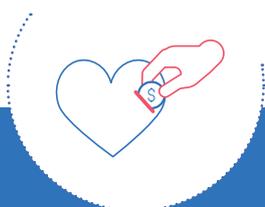
Connecting individuals to build resilient communities

Facebook allows every user to find their relevant communities – locally, nationally and internationally. In turn, this helps people to find new friends, discuss and donate to issues they care about, and collectively this assists communities in times of need. This encourages local community members to contribute to a social infrastructure that builds a more resilient and supportive society.

Key facts



83% of Australian Facebook users are a member of at least one Facebook Group



\$475 million was donated by Australians to causes they care about through links they saw on Facebook in 2017



Safety Check

has been activated 23 times by Australian communities since it was introduced in August 2016

Source: PwC Survey (2018) and Facebook Internal Data (2018)

At its core, Facebook operates as a platform for individuals with a shared common interest or characteristic to interact, whether this is friends, family or other members of the public. It provides people with the ability to connect and share ideas, photos, videos, or content relevant to their interests, building an engaged and inclusive society, both online and in physical communities.

As of July 2018, 16 million Australians access Facebook every month, and 13 million log in every day.³⁵ Of those with a profile, 60 percent believe that Facebook has a positive impact on their local community, and almost half say that it helps to create jobs and economic opportunities within their local area. This is higher than both the United States and UK which have comparable usage of Facebook.³⁶

As discussed in Section 1 of this report, assessing the social and non-commercial impact of Facebook is not as straightforward as measuring the economic impact, where a quantifiable increase in employment leads to an associated dollar value of economic growth. Instead, the benefits that communities derive from their citizens' use of Facebook is broader and harder to quantify.

As expressed in the framework in Figure 1, this section of the report looks at three key social benefits in further detail:

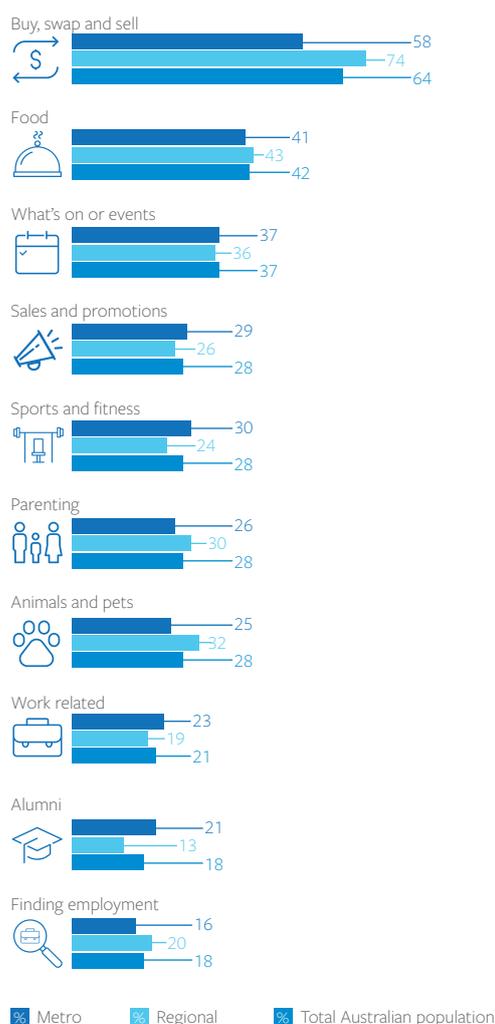
- 1 **Communication** – Australians are using Facebook Groups as a mechanism to find new friends and create new communities that are inclusive and supportive.
- 2 **Philanthropic awareness** – NFPs are using Facebook and Instagram as a tool to connect with the Australian population to drive a positive social change, creating awareness around important issues and helping to maximise donations from the public.
- 3 **Support in adversity** – Communities regularly connect via platforms such as Facebook to navigate their way through disasters, coordinating relief efforts and helping people in times of distress.

1. Facebook groups are creating inclusive communities

Facebook Groups is one tool that Facebook offers, allowing people to engage with other users to express opinions, share relevant content or discuss a common interest. PwC's survey shows 83 percent of Australians on Facebook use Facebook Groups, with a slightly higher usage in regional Australia (85 percent) compared to metropolitan Australia (82 percent). Of those respondents using Facebook Groups, 87 percent said they were very important, or slightly important, in connecting people with their local community.

Furthermore, of the Australian population that uses Groups, 55 percent say that have developed new friendships with people through the Groups that they engage with. Of those that have made new friends, 87 percent have physically met up with

Figure 9 – Most popular types of Facebook Group



Source: PwC survey 2018

Note: This shows the percentage of people that actively use Facebook Groups in each of the categories of Groups

PwC's survey shows Australians are members of 27 Groups on average, and actively use 11 of these



Source: Football Without Borders

these people, showing Facebook is contributing to real, physical friendships throughout Australia.

Besides creating new friendships, Groups provide a space for people to engage and share ideas. Figure 9 shows the most popular types of Group, including the split between metropolitan and regional Australia.

Buy, Swap and Sell Groups are the most popular amongst Facebook users in Australia, with a significantly higher proportion of users in regional Australia. The PwC survey shows 56 percent of Facebook users in regional Australia have purchased something from another individual through Groups or Marketplace, compared to 43 percent in metropolitan Australia. The average annual spend on these purchases is higher in regional Australia, at \$290 per year, compared to \$250 in metropolitan areas.

Some Groups are more popular amongst Facebook users in regional Australia such as 'Parenting', 'Animals and pets', and 'Finding employment' Groups. Albeit small, a higher proportion of people in regional Australia (66 percent and 63 percent for regional and metropolitan Australia respectively) report feeling more included within their local community from their use of Groups.

With the right platform and tools, Australian

citizens are naturally helping others. Case Study 2 shares the story of Mama Tribe, a Facebook Group designed for mothers who, like the founders, experience a period of loneliness and isolation after giving birth. Their success now sees local doctors referring new mothers to the Group as a place to meet others in similar situations.

Other Groups in regional Australia are more targeted. 'Football Without Borders' is a small Facebook Group, based in Darwin, with fewer than 300 members. They organise weekly male and female football matches for refugees and new migrants in Darwin, providing them with a safe space within a new community. The connections they make through playing football allow them to integrate better into society, find employment, develop their English language capabilities, learn cultural nuances and new computer skills. Five volunteers from the local area help to organise the matches, which now have regular players from 25 different countries.

'Show some #DairyLove' is another successful regional Group, which provides support for dairy farmers. Founded by a farmer in North West Victoria, the Group has over 16,000 members nationally, providing farmers with mental health support, positivity and contact with others in the industry.³⁷



Helping those in need

Case Study 2 Mama Tribe

Founded:
2017, Gold Coast

Facebook members:
35,000

Nikki and Haley, the co-founders of Mama Tribe, discovered first-hand the common feeling of going from a busy work and social life, to being a full time mum. The unrivalled joy of becoming a mum also led to feelings of immense isolation, leading Nikki and Haley to set up Mama Tribe in early 2017 – a Facebook Group that offers support to, and from, mums in similar positions. With around one in seven women experiencing postnatal depression in the year following childbirth in Australia,³⁸ they knew they were not alone.

In 2013 PwC estimated the cost to the Australian economy and community of not treating perinatal³⁹ depression and anxiety to be \$538 million.⁴⁰ It was clear something had to change, therefore the mission was simple; to ensure no mum felt lonely, isolated or without support, with the motto ‘no mum left behind’.

Within 24 hours, hundreds of mums had joined from all over Australia, and over a thousand within one week, leading Mama Tribe to establish separate location-based Groups. Each location has a designated ambassador to ensure the word of Mama Tribe spreads throughout the local community, encouraging mums to meet up in person. Facebook Groups acted as the perfect tool

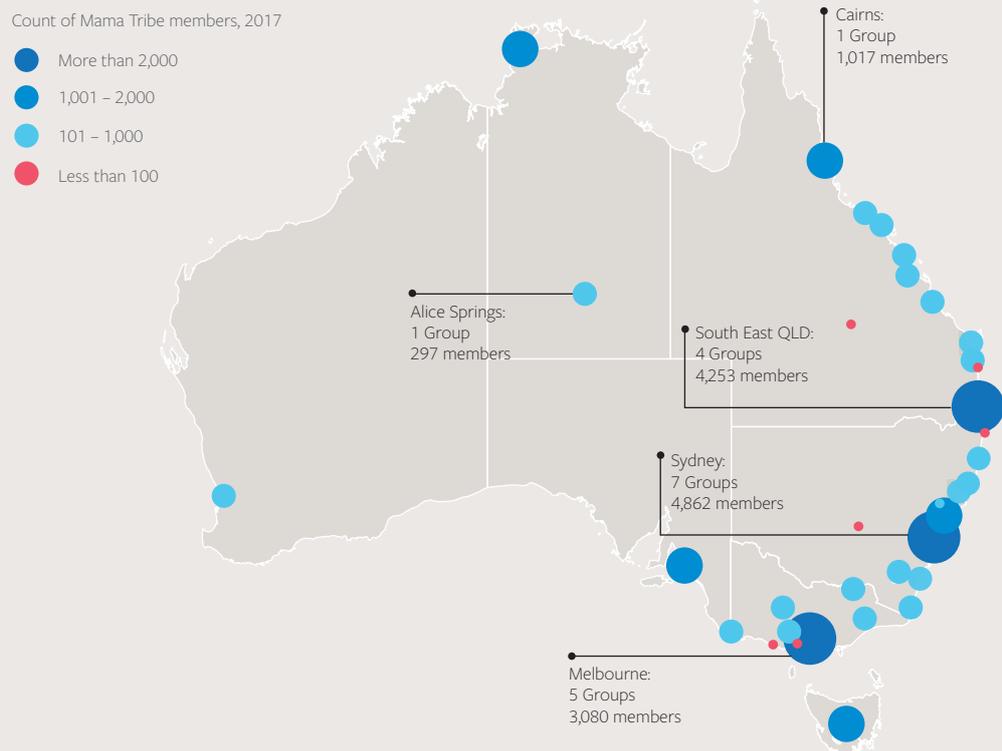
considering Australian parents spend 60 percent more time on Facebook mobile, than non-parents.⁴²

Within the first year over 50 location-based Groups were established, with almost 100 volunteer ambassadors, and around 30,000 members. Thousands of mums held meet-ups within their own communities, leading to new friendships for the mums, children and even boyfriends and husbands.

At the beginning of 2018 the community of Mama Tribe was strong, and following feedback from their supporters they have now launched ambassador facilitated monthly meet-ups called ‘Mama Mingles’, as well as a buddy system for new members that may feel nervous about attending.

Mama Tribe’s growth has been almost entirely organic, clearly servicing an unmet need. The majority of Group members have joined through recommendations from their friends and family that are existing members, but some mums are even receiving referrals from local doctors, demonstrating the Group’s ability to help those in need.

Figure 10 – Locations of Mama Tribe Groups in Australia



Source: PwC analysis of Mama Tribe data⁴¹

2. Facebook is used to create awareness around important issues and enables charitable donations

Through connecting with other users, Facebook provides a platform for people to discuss and donate to relevant causes that matter to them. This happens in two ways. Firstly, Facebook and Instagram provide platforms for charities to publicise their campaigns, missions and calls to action, helping to bring attention to social, environmental or political issues. Secondly, Facebook acts as a tool to share fundraising links with your friends, family and followers, generating awareness and funding for particular causes.

The PwC survey showed 23 percent of Australians on Facebook have donated to a charity or fundraising link they have seen on Facebook in the past year. With an average annual donation amount of roughly \$140 per person, this equates to around \$475 million in annual donations. It is worth noting that these may not all be new donations, but rather Facebook has enabled these through providing a platform to share links to donation pages regarding important issues in society.

Case Study 3 tells the story of Take 3 for the Sea, a charity founded in Bateau Bay, New South Wales, that uses Facebook and Instagram to share their ambition of removing plastic waste from beaches and public spaces.

Encouraging everyday environmentalism



Case Study 3 Take 3 for the Sea

Founded:

2009, Bateau Bay,
New South Wales

'Take 3 for the Sea' (Take 3) is a not-for-profit that encourages people to pick up three pieces of rubbish each time they visit a beach or public space. The organisation delivers education programs in schools, surf clubs, communities and online, to inspire participation in reducing the global issue of plastic pollution.

Take 3 joined Facebook in 2010 and Instagram in 2012, to help spread their ambitions for a cleaner planet beyond Australia. This has been successful, with half of their Facebook audience now located in other countries. After Australia, the majority of Take 3's Facebook followers are from the US, the Philippines, the UK and South Africa, showing their diverse reach with each of the top five countries in a separate continent.⁴³

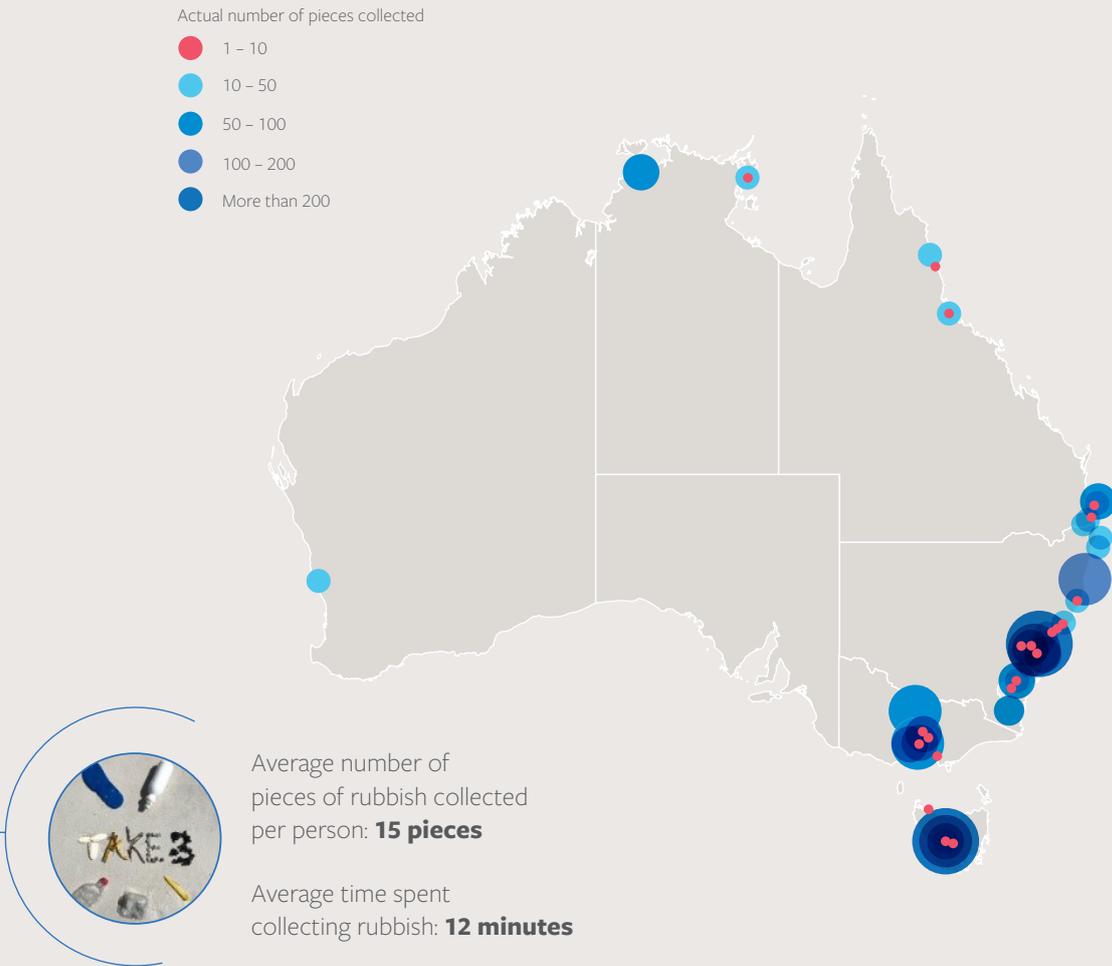
In 2017, Take 3 launched a three-month initiative called 'Pick it up. Snap it. Share it' on Facebook and Instagram. Followers of Take 3 were encouraged to post geo-tagged photos of rubbish they had collected from public spaces. A team from Macquarie University analysed a sample of 500 of the 4,000 images that were posted on Facebook, which found over 10,000 individual pieces of rubbish were collected from the sample alone. Whilst the majority of Facebook posts came from Australia, there were some from the US, the UK, New Zealand, and even the Bahamas. A call to action posted on Facebook and Instagram has resulted in a quantifiable impact in Australia and countries all over the world. Figure 11 shows the geographic spread of the Australian sample.

Looking at the use of the hashtag #take3forthesea on Instagram, there are over 16,000 public posts from **129 different countries**, with the highest usage in Australia, the US, the UK, Indonesia and Spain (see Figure 12).⁴⁴ What began as an idea on the New South Wales Central Coast has now had a tremendous impact on the environment in Sydney, Australia and all around the world. There are Instagram posts from every continent except Antarctica, and even reaching countries in Central Africa and mainland Europe.

It is especially encouraging to see engagement with Take 3 throughout Asia. Considering the top five countries responsible for contributing the most plastic to our oceans are China, Indonesia, the Philippines, Vietnam and Sri Lanka, and eight of the top ten most polluting rivers in the world are located within Asia, it is fundamentally important that Take 3's message is heard within these countries.⁴⁵

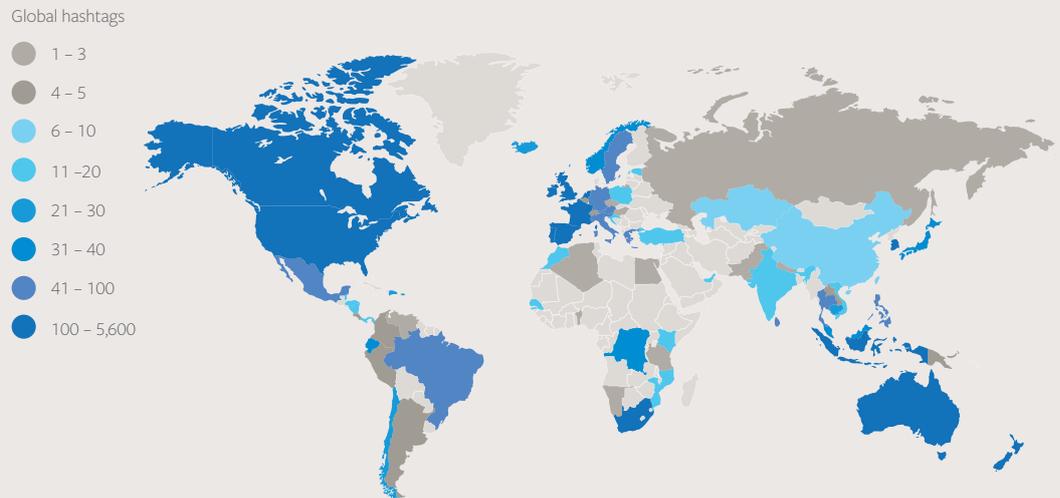
Looking ahead, if every Australian Facebook follower of Take 3 collected the average amount of rubbish that was collected by Australians during the sample, **1,200,000** pieces of rubbish would be cleared from public spaces within Australia during one year. Additionally, if all the Facebook followers of Take 3 from around the world collected the global average seen during the sample, over **2,500,000** pieces of rubbish would be collected worldwide, totalling nearly 35,000 hours of volunteering.

Figure 11– Number of pieces of rubbish collected within Australia during 3-month sample



Source: PwC analysis of Wilson, S.P. and Verlis, K.M. (2017)

Figure 12 - Global use of the #take3forthesea hashtag on Instagram



Source: PwC analysis of Instagram internal data (2017)

3. Facebook is used to unite communities in times of need

Communities in Australia regularly use platforms such as Facebook to help share information in emergencies and to coordinate response and relief efforts. To amplify and support communities in times of need, Facebook has developed new tools such as Safety Check, Community Help and AMBER Alert.

Increased integration and connections within society help to build more resilient communities that are better placed to support each other in emergencies. Emergencies appear in many forms, sometimes affecting the masses, and sometimes affecting an individual. Given the number of people on social networking sites, friends and family members are using Facebook to collaborate and assist each other in times of need.

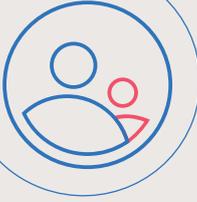
The ability to use Facebook as a tool to unite and support communities was evidenced by the Queensland Police Service (QPS) during the 2011 Queensland floods. The QPS Facebook Page experienced an increase from under 20,000 'likes' to over 160,000 within three days of the severe flooding events in Toowoomba, Lockyer Valley, Ipswich and Brisbane, enabling the QPS to reach a larger percentage of the population.⁴⁶ Their proficiency in using social media as an engagement tool during the floods and subsequent events has been internationally recognised.

Safety Check



During a major disaster, Safety Check helps people let their friends and family know they are safe, check on others in the affected area, and mark their friends as safe. The tool was first released in 2014 in response to Typhoon Ruby in the Philippines.

The Safety Check tool was developed in response to the ways in which communities used Facebook. Prior to Safety Check, members of local communities took the responsibility to create



Some of the major events in Australia where people have marked themselves safe are:

- 1 The Flooding in South Australia (2016)
- 2 The Flooding in Northeast Queensland (2018)
- 3 The Bushfire in Southwest Victoria (2018)
- 4 The Wildfire in Royal National Park (2018)
- 5 The Bushfire in Tathra, New South Wales (2018)

Source: Facebook Internal Data (2018)

Facebook Pages for people to communicate and either offer support, or ask for assistance in the form of supplies, shelter or medical support. For example, during Cyclone Yasi in 2011, Facebook Pages were used to share information by the community and research suggests this acted as a source of psychological first aid in the early stages of a disaster and helps to support aspects of community resilience. Take, as another example, the 2013 bushfires in Tasmania, where a local woman created a Facebook Page to help the affected communities. A request on the Page asked for any locals with a boat to meet in Cremorne the following day, ready to drop supplies to those who were confined by the bushfires. Over 200 boats departed the following morning, working alongside the emergency services to deliver essential items to those stranded.⁴⁷

The initial concept of Safety Check began in Japan during the Fukushima tsunami and nuclear disaster in 2011. Facebook engineers witnessed people turning to Facebook to let others know they were safe through posts and comments. Those original ideas developed into the first version of Safety Check that was released in 2014. Safety Check has continued to evolve based on user feedback and in 2016 was updated so that, instead of being turned on by Facebook, it would be turned on by the community. Once an incident occurs, a third party source alerts Facebook. If a lot of people in the area are talking about the incident, they may be invited to mark themselves as safe, and invite others to do the same, through Safety Check.

Since 2016, Safety Check has been activated 23 times by Australian communities and many millions of people have marked themselves as safe. The first community-activated Safety Check in Australia was for the earthquake in Bowen, Queensland, in August 2016. Since then, the most common activations of Safety Check are for bushfires (70 percent of events) and floods (17 percent of events).⁴⁸

Three of the top five uses of Safety Check in Australia, ranked by the number of people that marked themselves as safe, were in regional Australia. Nationally, 65 percent of activations have occurred in regional areas.⁴⁹

This is a clear indication that people living in remote and regional areas of Australia are using Safety Check should they find themselves in a natural disaster zone.

Community Help

To continue to ensure that the platform was helping people in times of need, in 2016, a team from Facebook met with seven communities that had been impacted by disasters in various locations around the world. From this consultation it was clear that Safety Check needed to service two key needs. First is the need for the user to let friends and family know they are safe – a need that Safety Check addressed. Second, members of the community were keen to know how they could help and offer assistance in the aftermath. This led to the creation of Community Help – a tool that allows people to offer and request help following a crisis, which launched in Australia in February 2017. With Community Help people can find and give help, and message others directly to connect after a crisis. Posts can be viewed by category

and location, making it easier for people to find the help they need. Australia was one of the first countries in which Community Help was launched.

AMBER Alert

A further example of communities turning to social networking platforms to help in times of need is when police require help sourcing information in the search for a missing person. To support the communities' desire to help, in January 2015, Facebook launched AMBER Alert in the United States to help distribute a dedicated alert with details of a missing child on Facebook to people who are in the area where the child went missing. The tool was launched in Australia in partnership with the Australian Federal Police, Queensland, New South Wales, Victorian, South Australian, Tasmanian, West Australian and Northern Territory Police services.

The AMBER Alert tool is activated at the direction of law enforcement and, once activated, a dedicated News Feed story that contains key information on the missing child will appear on Facebook to people who are in the search area. The alert will include important details about the child such as a photo, description, potential location, and any other available information that can be provided to the public to aid in the search. People are also able to share the alert with friends to further spread the word and help galvanise the community. Since the launch of the tool in Australia in June 2017, it has been used five times.⁵⁰



Source: Facebook Internal Data (2018)

Endnotes

- 01 The ABS defines a small business as employing less than 20 people, and a medium business as one employing 20 or more people, but less than 200. For this report we use the ABS definition but exclude non-employing businesses such as sole traders and holding companies which would distort the analysis.
- 02 Sensis (2017)
- 03 Morning Consult SMB Survey (2017)
- 04 This measures social networking usage by platform for those SMBs and individuals (aged 18+) with a presence on social networks
- 05 PwC Survey (2018)
- 06 Sensis (2017)
- 07 Sensis (2017)
- 08 Sensis (2017)
- 09 This analysis excludes businesses with no employees (i.e. sole traders or holding companies) which would distort the analysis, and excludes businesses in the following ANZSIC industries due to low sample sizes and lack of data availability: Agriculture, Forestry and Fishing, Mining, Electricity, Gas Water and Waste Services and Public Administration and Safety. Businesses in the NT and regional WA were also removed due to lack of data. \$ figures are Australian Dollars at 2015 levels.
- 10 Morning Consult defined a SMB as having up to 500 employees. Only 12.7% of survey respondents fall into the 101-500 employee category, therefore all businesses in this category have been included as they do not have a significant impact on the analysis or results.
- 11 Sensis (2017)
- 12 ABS (2017a), ONS (2017) and SUSB (2018)
- 13 PwC (2015)
- 14 Real estate, Energy/Mining, and Agriculture were removed from analysis due to small sample sizes
- 15 IAB and PwC (2017)
- 16 ACCC Digital Platforms Inquiry, Facebook submission (2018)
- 17 Sensis (2017)
- 18 PwC Survey (2018)
- 19 PwC analysis of Morning Consult SMB survey (2017), and ABS (2017a)
- 20 Facebook internal data (2017)
- 21 AusTrade (2017)
- 22 UTS (2017)
- 23 UTS (2017)
- 24 Morning Consult SMB survey (2017)
- 25 ABS (2017c). The top five exports of goods and services from Australia are industries typically dominated by larger businesses: iron ores and concentrates, coal, education-related travel services, gold and natural gas. AusTrade (2017)
- 26 This analysis considers the impact of Facebook on Australian SMBs from an ABS Statistical Area Level 4 (SA4) perspective. There are 109 SA4s, which are geographical areas defined by the ABS for the use of statistical analysis in Australia, taking into account both population and labour markets.
- 27 Regional areas for the purposes of this study are all SA4s not included in the GCCSA of each state and territory as defined by the ABS, or in the ACT
- 28 Metropolitan areas for the purposes of this study are all ABS Statistical Area level 4 (SA4s) included in the Greater Capital City Statistical Areas (GCCSA) of each state and territory as defined by the ABS, and all SA4s in the ACT
- 29 Future of Business Survey (December 2017). Here, SMB refers to a business with less than 250 employees across all industries, and excludes sole traders or businesses with no employees such as holding companies
- 30 Morning Consult SMB Survey (2017)
- 31 These figures do not account for displacement
- 32 ABS (2017b)
- 33 ABS (2016)
- 34 Tasmanian Treasury (2017)
- 35 Facebook internal data (2018)
- 36 Morning Consult Consumer Survey (2017)
- 37 ABC News (2018)
- 38 Perinatal Mental Health Consortium (2008)
- 39 From conception to the end of the first year of a child's life
- 40 PwC (2014)
- 41 Mama Tribe internal data (2018)
- 42 Facebook IQ, Meet the Parents Australia, (2017)
- 43 Take 3 for the Sea, Internal data (2017)
- 44 Instagram internal data (2017)
- 45 Jambeck et al. (2015), and Schmidt et al. (2017)
- 46 Taylor, M., Wells, G., Howell, G., and Raphael, B. The Australian Journal of Emergency Management (2012)
- 47 ABC (2013)
- 48 Facebook internal data (2018)
- 49 Facebook internal data (2018)
- 50 Facebook internal data (2018)



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