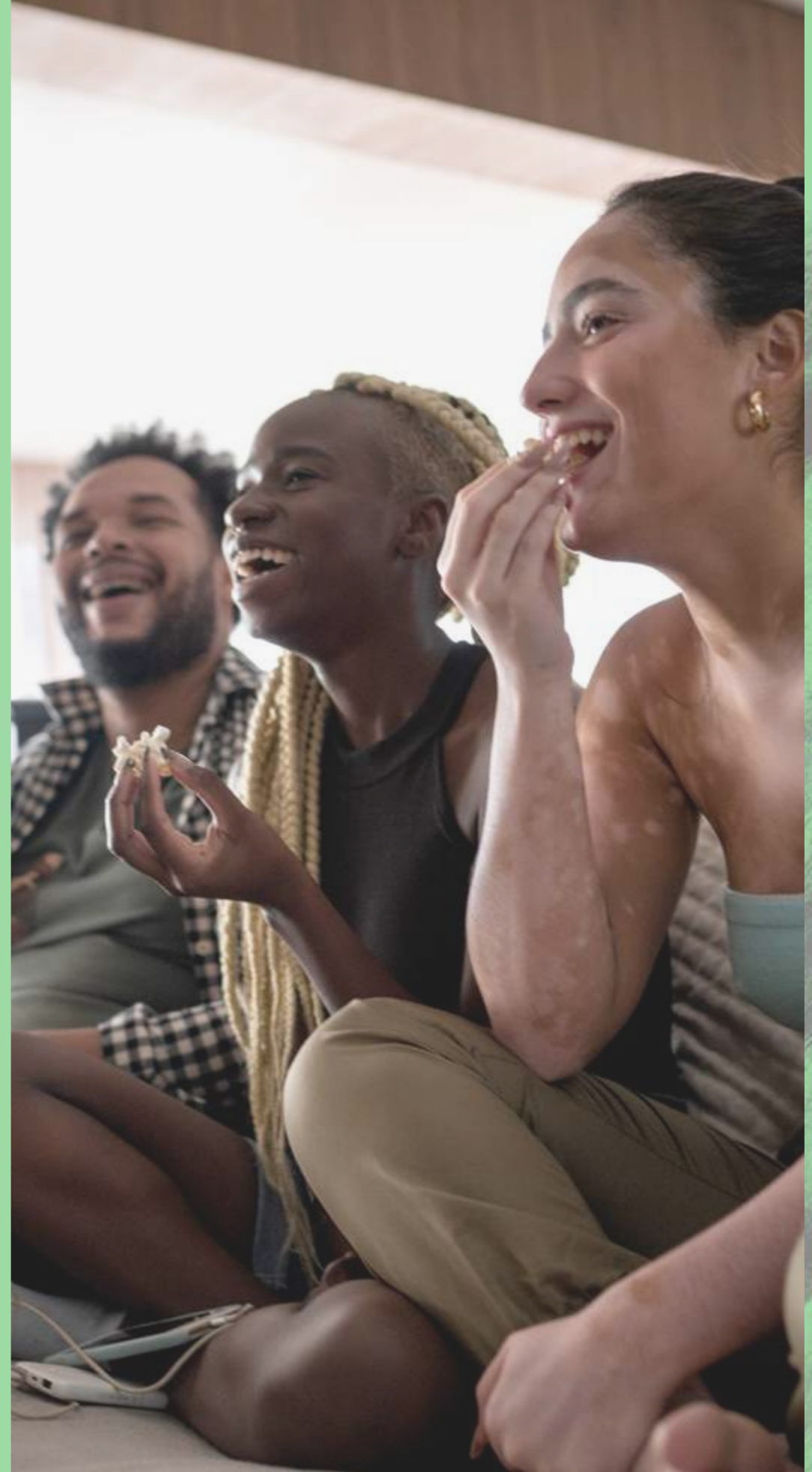


# CTV Is for Everyone

Unlocking TV's new diverse audience



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# Unlocking TV's new diverse audience

The media landscape has experienced a seismic cultural shift in the past three years. To better reflect Europe's richly diverse and increasingly conscious society, media owners, brands, and agencies are setting new standards for the level of diversity represented in their work.

Interestingly, recent technological advances are adding momentum to this shift. We see this clearly in the evolution of television advertising,

where underrepresented groups are being more carefully considered, cultural nuance is becoming better understood, and conscious consumerism is taking priority.

The growth of CTV advertising has played a key role in empowering advertisers to understand the new TV audience, who expect flexibility and world-class content, but do not delineate between different TV formats.

Audiences now move seamlessly between broadcast AVOD (Advertising supported Video On Demand) services, native OTT (Over-The-Top) platforms and traditional linear TV. Advertisers must be able to reach viewers across multiple touchpoints.

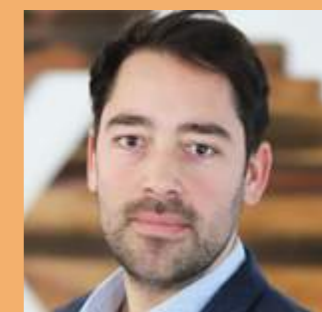
With a change in audience composition and viewing habits, now is a critical time for brands to better understand how to reach these addressable audiences and the ways they consume content.

“Not only are CTV viewers more engaged, they also are an accurate representation of Europe's richly diverse population.”

When we compare data from SpotX's research conducted last year with data sourced in this report, we see four out of five households in the EU5 are now reached by a connected TV, a 30% increase from 2020.

Not only are CTV viewers more engaged, they are also an accurate representation of Europe's richly diverse population.

Our objective with this report, which follows our 'CTV is For Everyone' and 'CTV: Future Forward' reports, is to continue to build out a holistic picture of the European CTV landscape at a pivotal time in its development. It contextualises the composition of the new TV audience so that advertisers can best understand the optimal balance of media investment across CTV and linear television.



EDWARD WALE  
MD CTV, EMEA AT MAGNITE



# Defining CTV

Before we dive into our research findings, it's important to define the term "CTV" clearly.

CTV is a television set connected to the internet through the built-in capabilities of a smart TV, streaming device or gaming console, which enables the viewing of video content streamed to the large screen.

You can find a full glossary of definitions at the end of [this report](#).

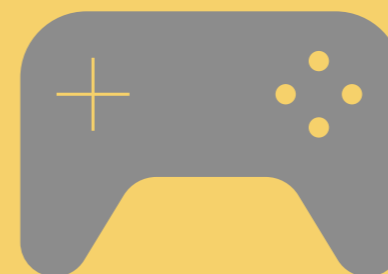
## CTV:



Smart TVs



Streaming Devices



Gaming Consoles

## Over the Top:



Desktops/  
Laptops



Phones/  
Tablets

# TV viewing and the global pandemic

The effects of the coronavirus pandemic have **amplified and accelerated the transition to CTV** as a way for Europeans to access premium content that differs from the standard options found on traditional television in a flexible, personalised way.

According to data provided by Samsung Ads, the leading connected audience platform, the pandemic has coincided with a significant shift in consumers' preference to stream content.

## SAMSUNG Ads

Across the EU5 markets, between January 2020 and May 2021, traditional TV viewing rose by 17%, while CTV consumption increased by 55%.

Samsung TV viewers across the EU5\* now spend a similar amount of hours enjoying both linear (1h 59min) and streamed (2h) content per day.

"Consumption of both linear and streaming has increased throughout the last year, with streaming hours growing at a significantly faster rate across Samsung smart TVs in Europe.

Samsung TVs in the UK and Germany consume the most CTV content, with an average of 2h 8min and 2h 7min daily viewership respectively per month, followed closely by Spain and France, with 2h 5min and 1h 58min of average daily streaming respectively.

Whilst streaming adoption grew twice as fast as linear across Italian Samsung TVs, linear still remains strong in the region,

with an average of 2h 2min of daily linear viewership per month versus 1h 34min of streaming.

In the near future, we anticipate this trend will increase as new viewing behaviours become established habits amongst European audiences."



ALEX HOLE  
VP, EUROPE AT SAMSUNG ADS

\*EU5 - the UK, Germany, Italy, Spain and France

# CTV is for everyone: Five key takeaways



1

## Hybrid TV viewing is the new normal

71% of European audiences now watch a combination of traditional TV and CTV content. 30% of households say they watch mostly CTV delivered content, whereas only 22% watch traditional TV exclusively.

2

## The CTV audience mirrors Europe's diverse profile

Streamers match the national profile, whereas the traditional TV audience skews older and consequently underdelivers younger audiences.

3

## Ad-supported programming is becoming a primary way CTV viewers watch content

Ad-free content such as Netflix and Disney+ no longer dominate CTV content consumption. CTV viewers now watch an almost equal amount of ad-supported content.

4

## CTV's reach goes beyond the boundaries of language and location

CTV is not limited to the constraints of language and location in the same way traditional programming is. The flexibility of CTV meets the needs of modern audiences who wish to watch niche or foreign language content.

5

## CTV better caters to the newly emerging conscious consumer

80% of CTV viewers said they are more likely to pay attention to ads from brands that are in line with their lifestyle and opinions, and attentive viewers are much more likely (65%) to make a purchase after seeing an ad versus those who are passively watching.

European trend:

# CTV delivers diversity

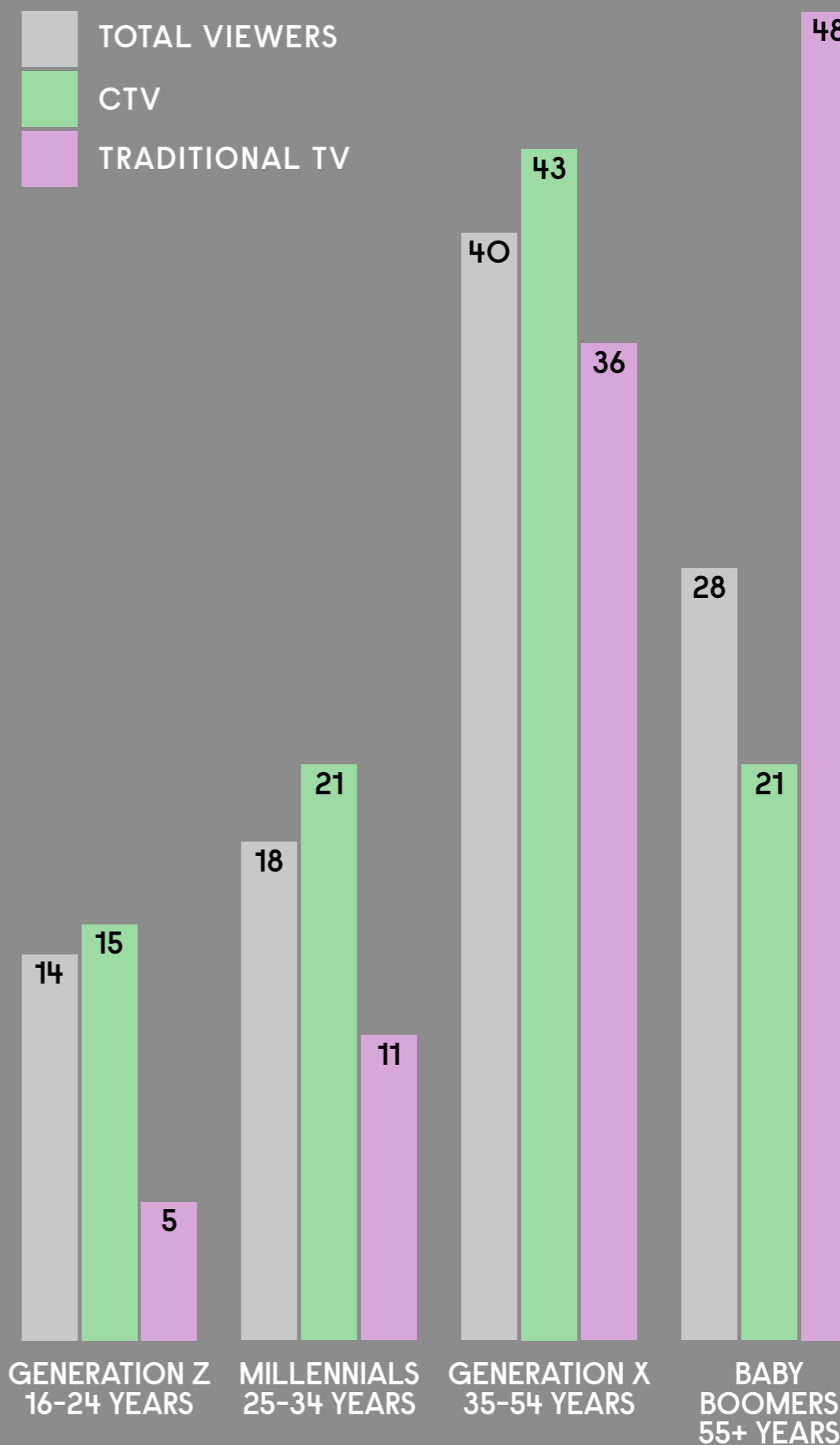
When we look at European TV audiences, it's important to realise the range of lifestyles, backgrounds, languages and interests which make up this unique population. Europe is rich in cultural differences, which has cultivated a robust TV industry while simultaneously making it harder for advertisers to keep up with the demands of such a fragmented ecosystem.

CTV is well equipped to deal with this fragmentation and deliver incremental results for advertisers. For example, due to the limitations of traditional programming, a third of Europeans watch TV content that is not in their first language on CTV.

Content owners now have the ability to deliver local language content in a flexible, personalised way, whether through a broadcaster AVOD service or a native OTT platform via CTV.

CTV audiences as a whole offer a strong representation of the national population. While traditional TV audiences are ageing, CTV captures younger, more digitally savvy audiences. This means advertisers targeting the 18-44 year old category see significantly better results when including CTV as part of their wider TV strategy.

The Traditional TV audience is mostly 55+  
% who watch



European trend:

# CTV caters to the conscious consumer

In the past few years, consumers have become more in tune with their political beliefs and personal values, and they trust social media less now than they did twelve months ago. Most Europeans want to buy from brands that are aligned with their lifestyle and opinions, regardless of whether they are traditional TV or CTV viewers.

As political and societal opinions have strengthened, social media platforms have become less trusted environments.



**18% say their political opinions have strengthened in the last 12 months**



**23% of CTV viewers have a more negative opinion of social media**

CTV provides a more trusted environment for consumers to access content and provides advertisers with a safer ecosystem to connect with consumers.

Long-form video on social media platforms is a much less effective means of reaching consumers who also watch CTV.

→ 54% of CTV users who also use social media platforms are not watching professionally produced content (TV shows, movies, etc) on social platforms – they typically watch CTV for that type of content.

→ Only 26% of CTV users are likely to pay attention to a video ad on social media.

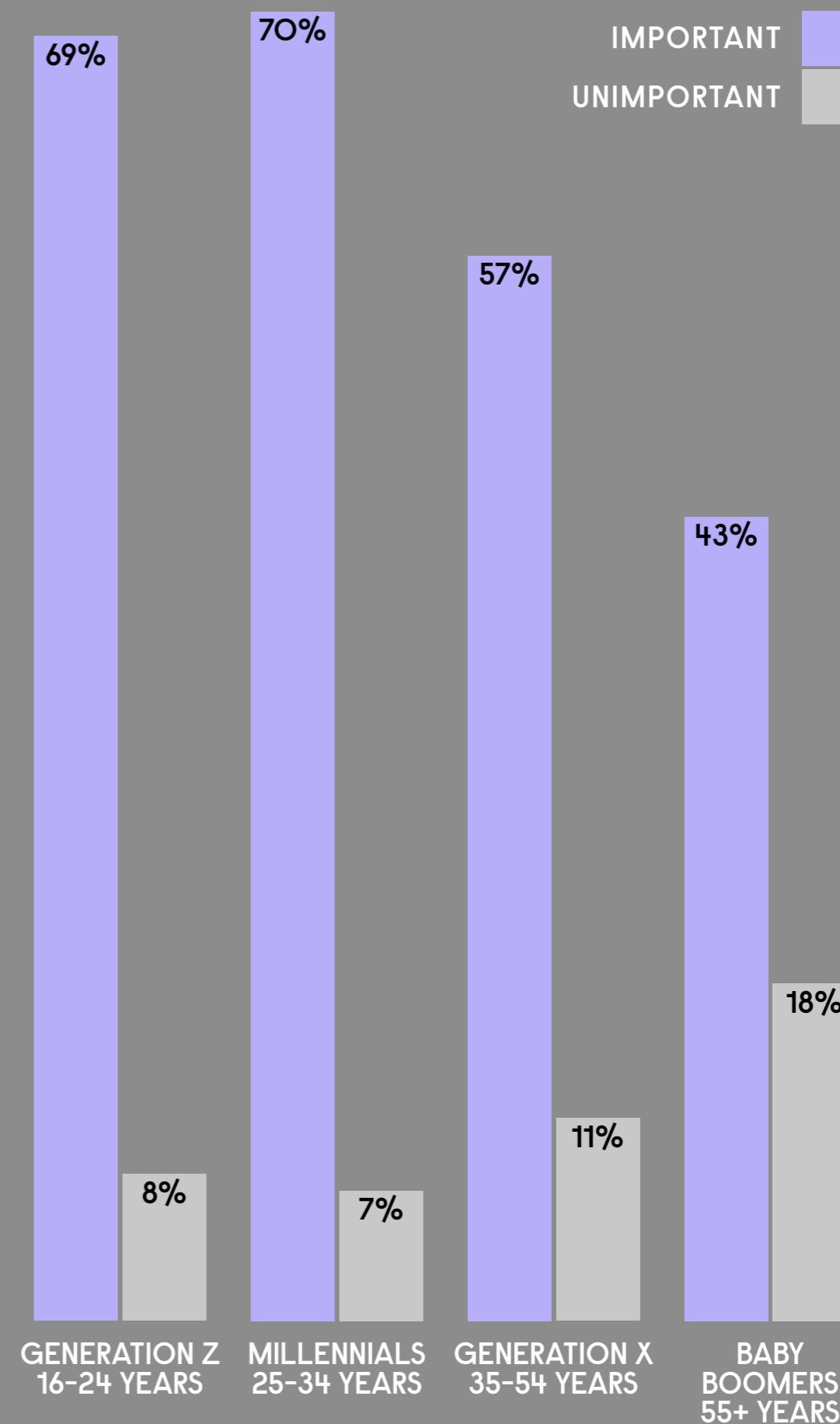
CTV viewers place more importance on their identity, values, and opinions being reflected by the brands they buy from.

→ 62% say that it is important to buy brands that are in line with their lifestyle and opinions.

→ 49% are willing to share information in order to receive ads from brands that match their interests and values versus 28% of traditional TV viewers.

→ Millennial CTV viewers place more importance on brand value alignment than any other TV audience (70% say buying from brands whose values align with their own is important).

## Importance of brand values





European trend:

# CTV influences purchasing decisions

CTV audiences are more open to receiving ads that are relevant to their interests than traditional TV viewers. Forty-nine percent of CTV viewers confirmed that they would be willing to share personal information with a media service in order to receive ads from brands that match their interests and values compared to 28% for traditional TV viewers. Furthermore, **56% of CTV viewers said they are more likely to pay attention to personalised ads, compared to 31% of Traditional TV viewers** who agreed with that question.

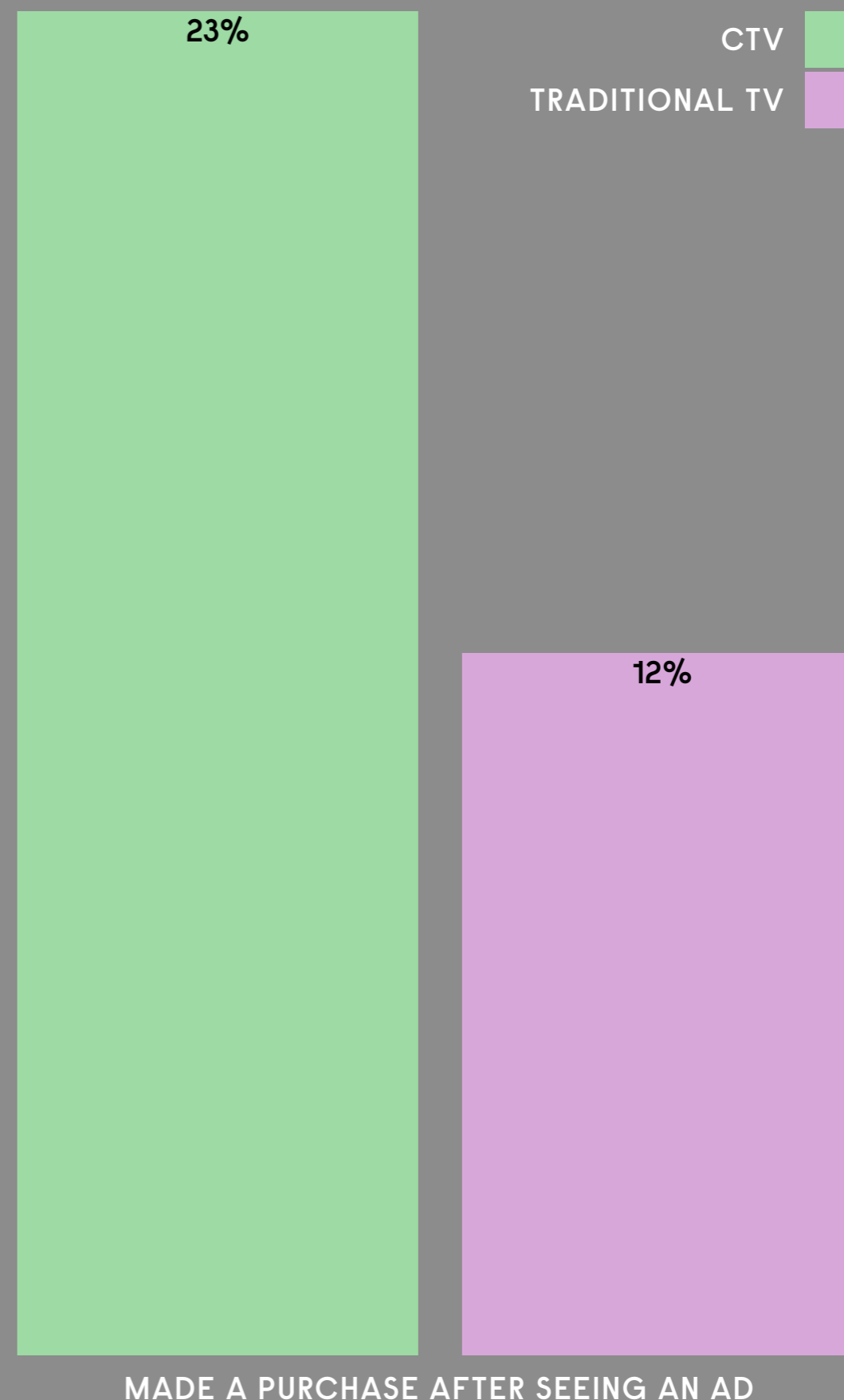
Conversely, traditional TV viewers are generally less tolerant of ads. This is likely because they are paying to receive content through their cable/satellite subscription and ad loads tend to be higher within traditional TV programming.

Brands that thoughtfully target CTV viewers with messaging that is in line with their interests, values, and lifestyles are 80% more likely to be paid attention to.

Attentive and engaged viewers are much more likely (65%) to make a purchase after seeing an ad versus those who are passively watching, disinterested, or who switch their attention to another screen or activity.

CTV's addressable nature, combined with a greater level of ad receptivity by the audience, makes it a more effective environment for driving purchase conversions. When we asked CTV viewers and traditional TV viewers how likely they are to buy a product after seeing an ad they paid attention to, CTV viewers were twice as likely to make a purchase.

## CTV viewers are more likely to make a purchase after seeing a TV ad



# The AVOD opportunity

“CTV has boomed over the past 18 months and, as this research reveals, shows no sign of slowing down. It’s not surprising that the ability to watch quality content at the click of a button has proved so popular across Europe - people are seeking more flexibility in all areas of life, and watching TV is no different.

But what we are seeing change is consumer willingness to pay for multiple streaming subscriptions - our research at The Trade Desk found that many people would prefer an AVOD streaming service, with the cost partially offset by ads.

“As Magnite’s research reveals, viewers are more likely to pay attention to ads that resonate with their interests and values.”

This is a huge opportunity for brands and advertisers to reach large, diverse audiences that they may not find elsewhere - particularly the younger generations with tomorrow’s purchasing power. As Magnite’s research reveals, viewers are more likely to pay attention to ads that resonate with their interests and values. This means that the smart application of data is required to ensure they are reaching the right people, at the right time.”



**DAVE CASTELL**  
GM EMEA INVENTORY &  
PARTNERSHIPS AT THE TRADE DESK



# The EU Five: An in-depth look at the five major TV markets in Europe



# UK

“The UK TV market is flourishing, despite production challenges brought on by the global pandemic. A wealth of premium content, the high penetration of smart TVs in households, and widespread adoption of FASTs mean that audiences are enjoying the best of hybrid viewing in record numbers.

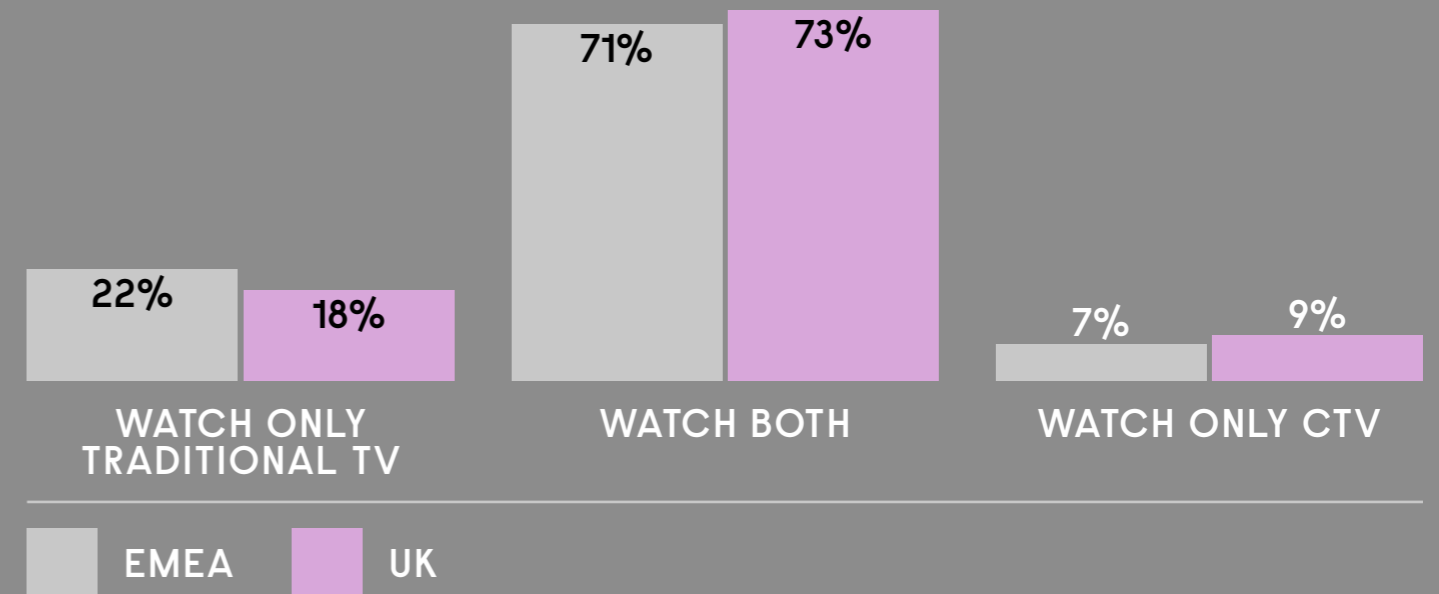
This provides an enormous opportunity for advertisers looking to extend their audience reach beyond the barriers of traditional TV services. Whether it’s watching niche or foreign language content, incorporating CTV into a TV buying plan should now be considered essential in order to cater to the rich cultural variety within the UK.”



**JULIE SELMAN**  
MD UK & NORDICS AT MAGNITE

## Who Are UK CTV Viewers?

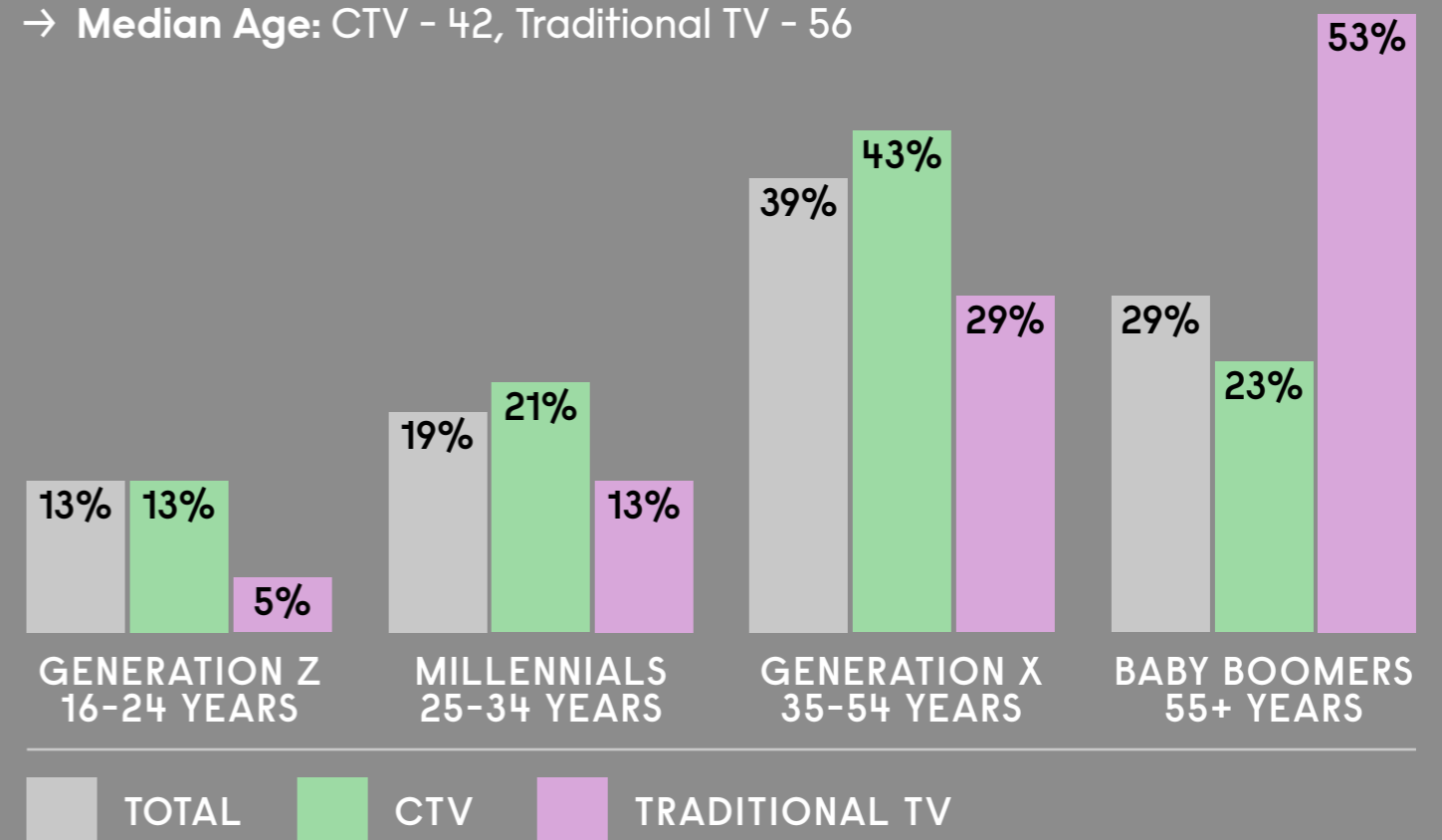
CTV has widespread adoption in the UK, outpacing the other EU5 countries. CTV viewership is fast approaching traditional TV viewership levels, demonstrating that CTV is just as preferred as traditional TV.



## Age

CTV is watched by all age groups across the UK and mirrors the population. In contrast, traditional TV significantly over delivers against the older Boomer demographic and under delivers against the under 40-year-old population.

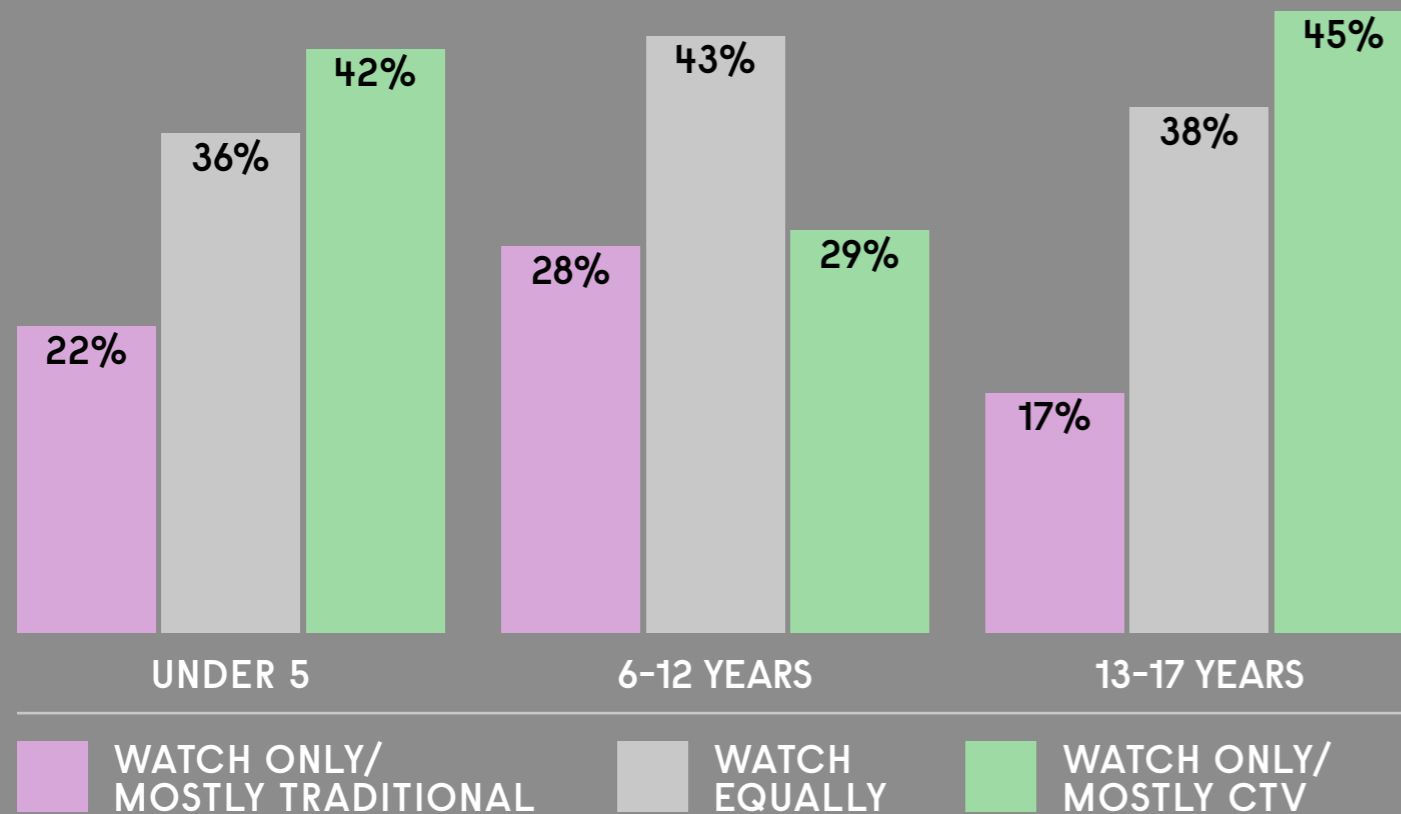
→ Median Age: CTV - 42, Traditional TV - 56



## Households with children

Parents are easier to reach with CTV, especially households with teens:  
45% of households with teens watch mostly streamed content.

→ 46% of CTV viewers have kids in the household (vs. 31% for traditional TV)



## CTV Reaches diverse audiences

- 68% of purchase decision-makers
- 89% of Gamers and 28% watch only CTV
- 65% of light TV viewers
- 69% of those born outside of the UK

## How are they watching?

- 42% of CTV households have two or more smart TVs
- 77% of CTV viewers typically watch with at least one other person
- 75% subscribe to one or more FASTs while 27% use three or more FAST services, the highest in the EU5

Between January 2020 and May 2021, data from Samsung smart TVs showed traditional TV viewing in the UK rose by 19%, while CTV consumption increased by 59%.

SAMSUNG Ads

## CTV and Social Media

- 64% of CTV viewers do not watch professionally produced content on social media channels, the highest amongst the EU5
- 65% of CTV viewers pay more attention to an ad on CTV vs. social media (22%)

## Attitudes to advertising

CTV viewers vs. traditional TV viewers

- 24% more likely to purchase the product after seeing the TV ad
- 54% more likely to share personal information to receive relevant advertising
- 70% more likely to pay attention to relevant messaging
- 35% more likely to buy brands that align with their values and opinions

# Germany

“German CTV viewers are the most receptive to advertising in comparison to other audiences in the EU5, highlighting the unique opportunity for advertisers looking to reach engaged and increasingly diverse consumers.

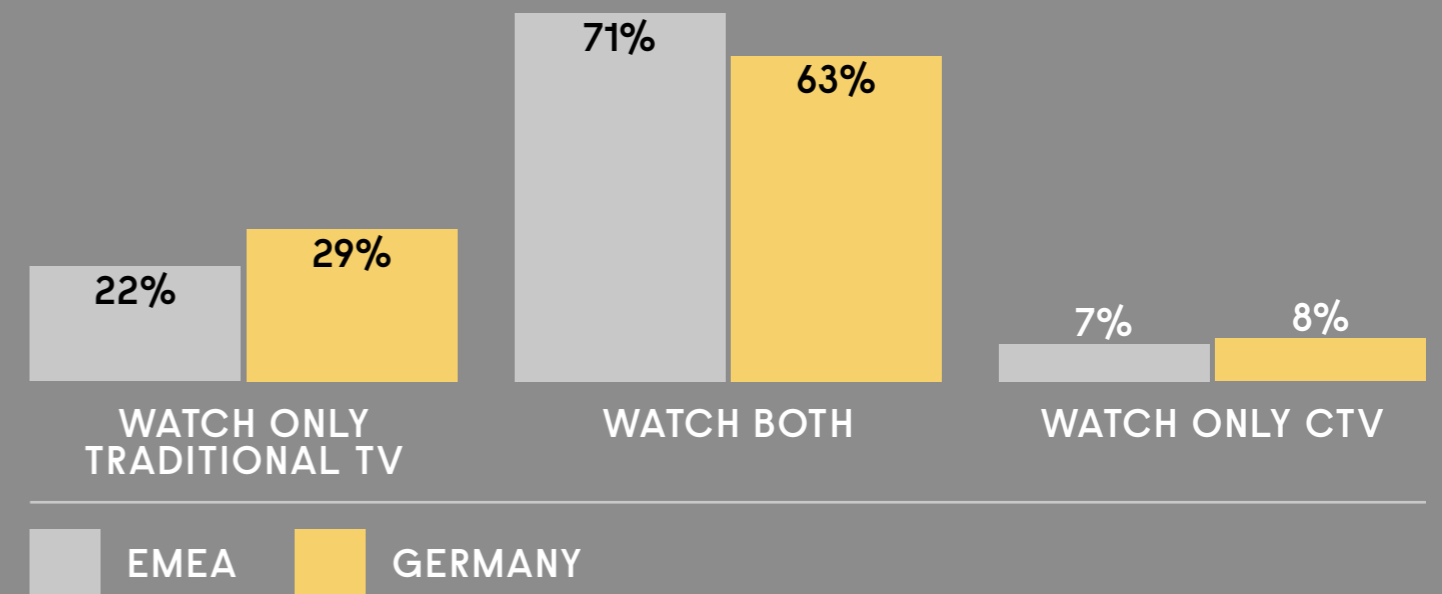
Traditional television in Germany remains strong, but the growing trend for hybrid viewing shows how Germans are embracing streaming platforms, particularly since the global pandemic. The growing mistrust of social media in the country means CTV provides an alternative for advertisers looking to connect with conscious consumers; a growing segment of our society.”



**JOHANNES PAYSSEN**  
MD CENTRAL EUROPE AT MAGNITE

## Who Are German CTV Viewers?

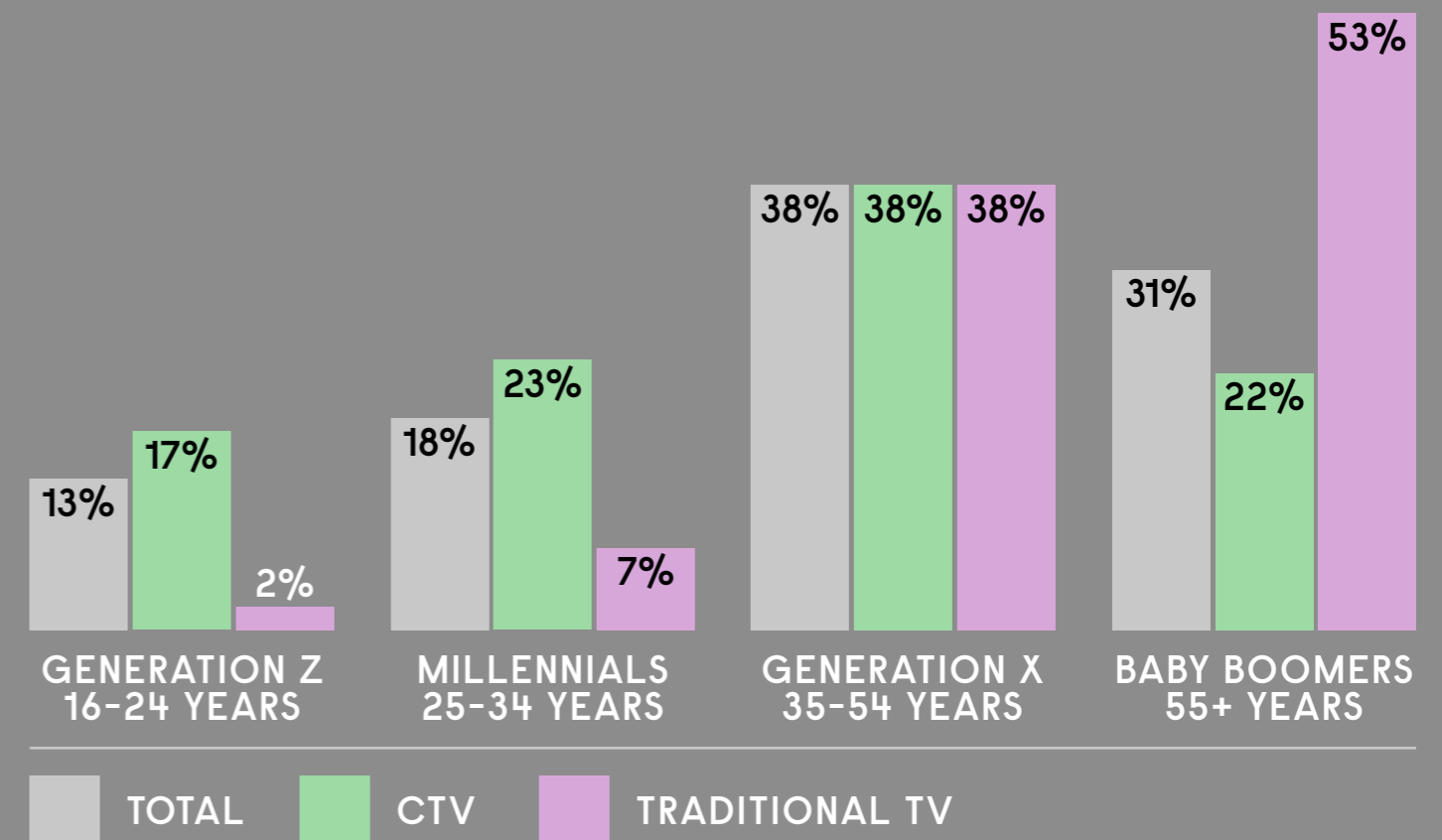
CTV adoption has somewhat lagged behind the other markets, but CTV gained in popularity, driving strong levels of hybrid viewing.



## Age

CTV is watched by all age groups across Germany and is more representative of the German population than traditional TV which significantly underdelivers against ages 18-40 (Gen Z and Millennials).

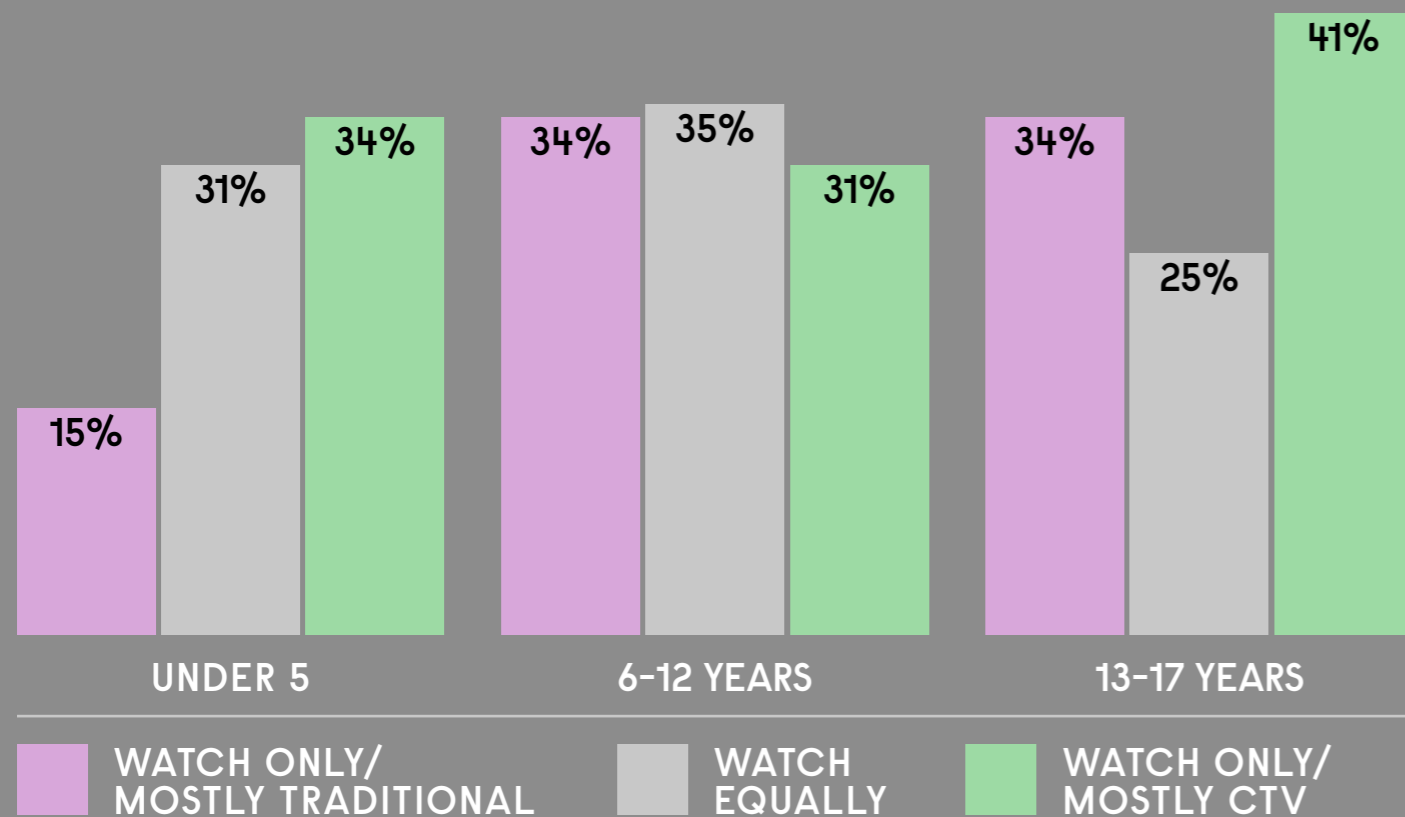
→ Median Age: CTV - 39, Traditional TV - 56



## Households with children

Parents are easier to reach with CTV, especially households with teens:  
41% of households with teens watch mostly streamed content.

→ 40% of CTV viewers have kids in the household (vs. 26% for traditional TV)



## CTV Reaches diverse audiences

- 58% of purchase decision-makers
- 88% of Gamers and 30% watch only CTV
- 63% of light TV viewers
- 67% of those born outside of Germany

## How are they watching?

- 35% of CTV households have two or more smart TVs
- 74% of CTV viewers typically watch with at least one other person
- 30% of CTV viewers are watching foreign language content
- 44% subscribe to one or more FASTs

Between January 2020 and May 2021, data from Samsung smart TVs showed traditional TV viewing in Germany rose by 14%, while CTV consumption increased by 53%.

SAMSUNG Ads

## CTV and Social Media

- 60% of CTV viewers do not watch professionally produced video content on social media channels
- 51% of CTV viewers are more likely to pay attention to an ad on CTV vs. social media (29%)

## Attitudes to advertising

CTV viewers vs. traditional TV viewers

- 217% more likely to purchase the product after seeing the TV ad
- 106% more likely to share personal information to receive relevant advertising
- 127% more likely to pay attention to relevant messaging
- 71% more likely to buy brands that align with their values and opinions

# France

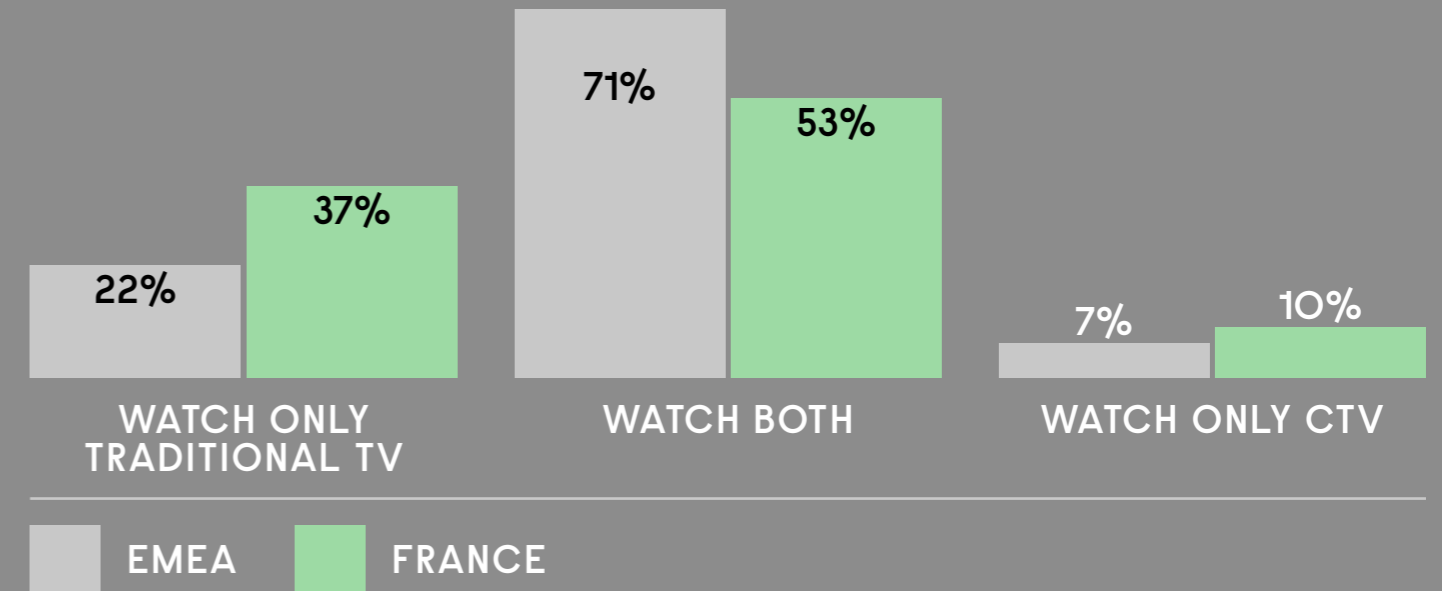
“The French TV market is highly unique. The IPTV delivery system present in most households has created a separate TV ecosystem within the wider European framework. This presents its own specific challenges and opportunities for advertisers looking to reach incremental audiences in France.

While this ecosystem can seem complex, the growing popularity of CTV services, fuelled by the recent launches of Disney+, Pluto TV and SALTO, is an encouraging development for advertisers. CTV audiences in France are much more representative of the general population than traditional TV viewers and, in general, are more receptive to advertising.”



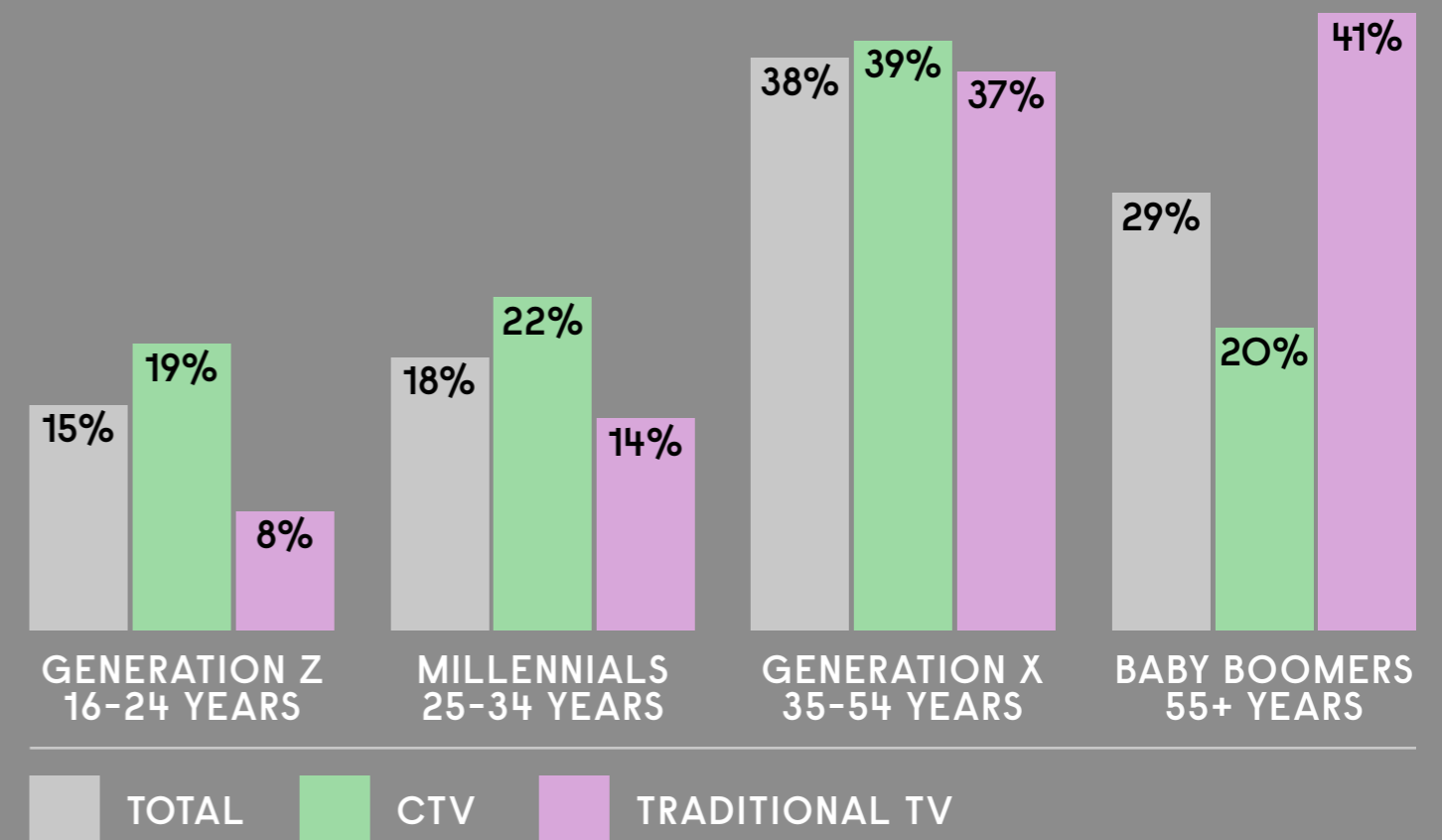
VALÉRIE LATRONCHE  
MD FRANCE & BELGIUM AT MAGNITE

## Who Are France's CTV Viewers?



### Age

CTV is watched by all age groups across France and is more representative of the French population than traditional TV.  
→ Median Age: CTV - 40, Traditional TV - 50

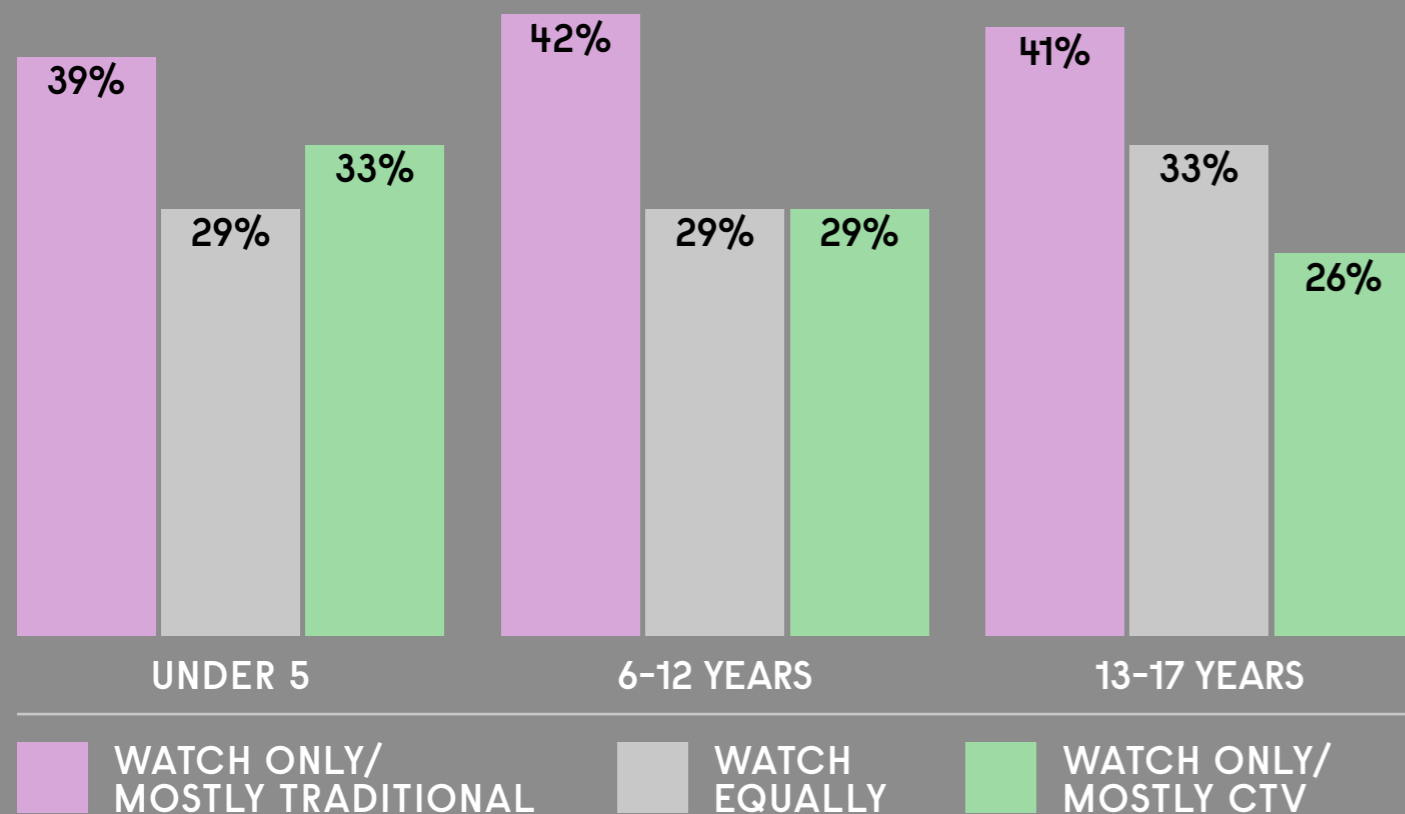




## Households with children

Parents are still watching more traditional TV than CTV, but nearly a third of parents are being missed altogether with traditional TV messaging.

→ 61% of CTV households have kids (vs. 31% for traditional TV), a significant increase over last year



## CTV Reaches diverse audiences

- 56% of purchase decision-makers
- 79% of Gamers and 32% watch only CTV
- 52% of light TV viewers
- 57% of those born outside of France

## How are they watching?

- 26% of CTV households have two or more smart TVs
- 76% of CTV viewers typically watch with at least one other person
- 37% watch foreign language content
- 54% subscribe to one or more FASTs, 29% use two or more FAST services

Between January 2020 and May 2021, data from Samsung smart TVs showed traditional TV viewing in France rose by 16%, while CTV consumption increased by 69%.

SAMSUNG Ads

## CTV and Social Media

- 47% of CTV viewers do not watch professionally produced content on social media channels
- 61% of CTV viewers pay more attention to an ad on CTV vs. social media (26%)

## Attitudes to advertising

CTV viewers vs. traditional TV viewers

- 62% more likely to purchase the product after seeing the TV ad
- 64% more likely to share personal information to receive relevant advertising
- 56% more likely to pay attention to relevant messaging
- 43% more likely to buy brands that align with their values and opinions

# Italy

“The Italian TV market is experiencing a renaissance as increased broadband and smart TV penetration evolves the way the general population accesses TV content. This shift to streaming services, particularly amongst the young, makes the Italian CTV market an attractive prospect for advertisers looking to future-proof their TV buying strategies.

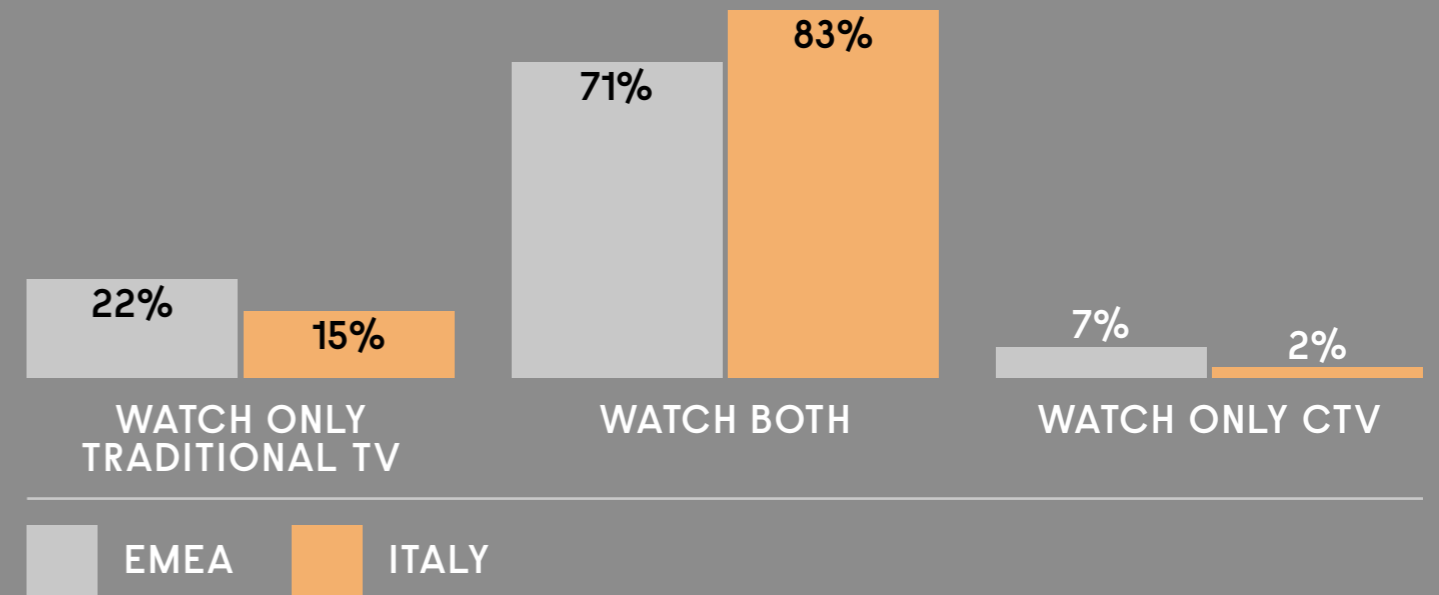
Italy has the strongest presence of free ad-supported television services (FASTs) per household, which is amongst the highest of the EU5. This means CTV reaches a wide variety of key consumer targets, many of whom are hard to find on traditional television. This presents a unique opportunity for brands to expand their reach to broader audiences.”



SARA BULUGGIU  
MD ITALY, SPAIN & MENA AT MAGNITE

## Who Are Italian CTV Viewers?

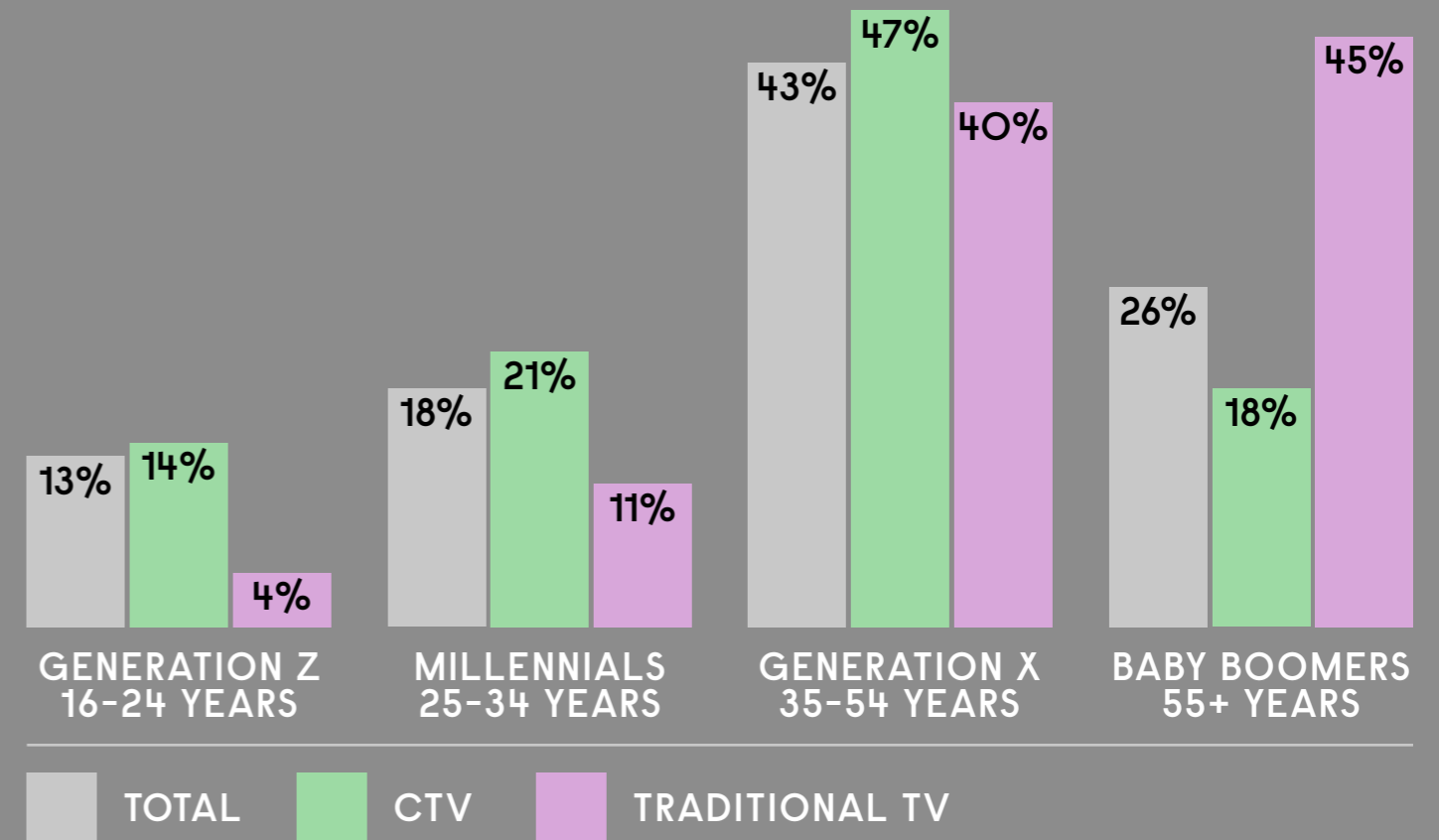
CTV adoption is evolving, with viewers integrating CTV into their regular viewing habits.



## Age

CTV is watched by all age groups across Italy and is more representative of the Italian population than traditional TV which significantly underdelivers against ages 18-40 (Gen Z and Millennials).

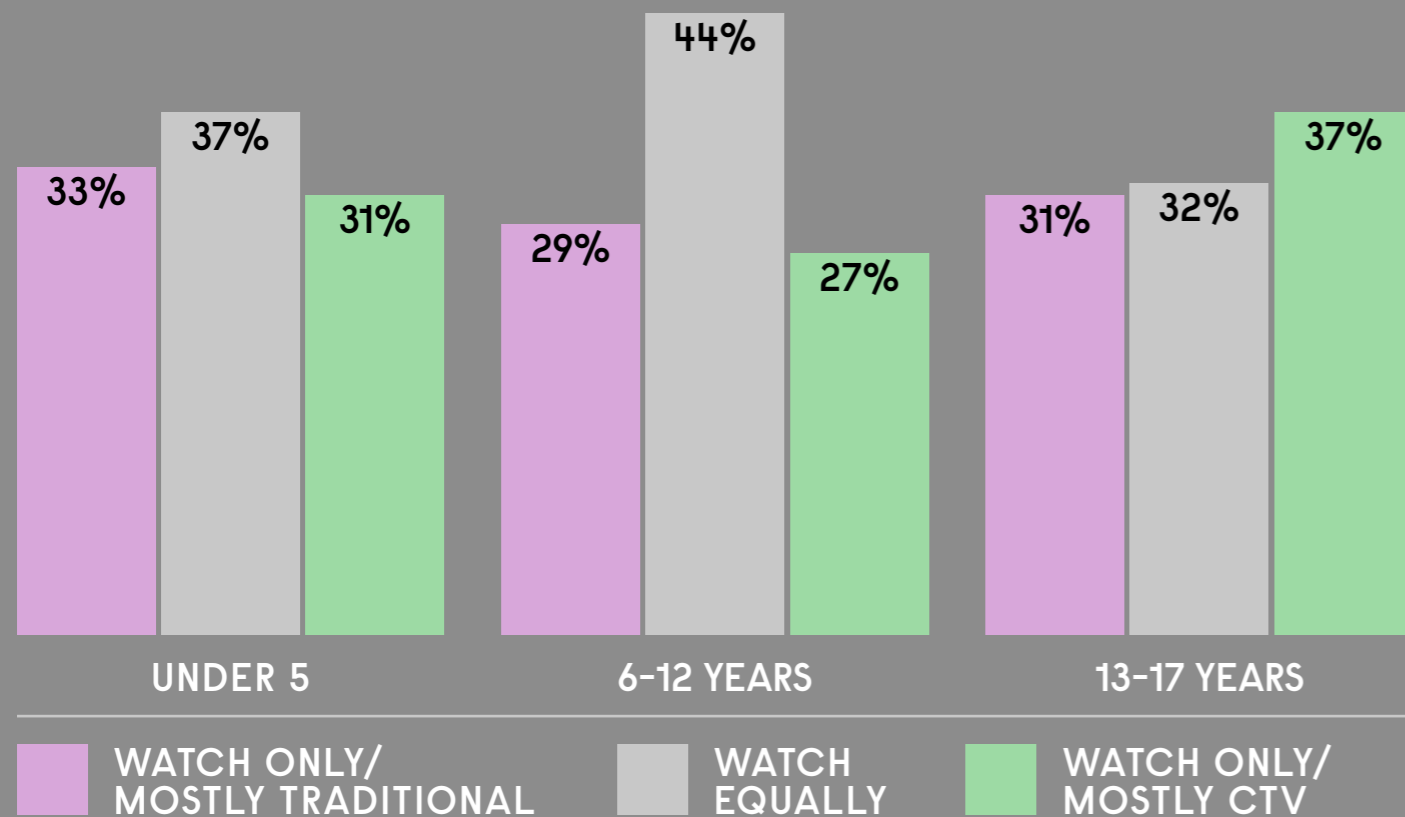
→ Median Age: CTV - 41, Traditional TV - 52



## Households with children

Parents are easier to reach with CTV, especially households with teens: 37% of households with teens watch mostly streamed content.

→ 50% of CTV viewers have kids in the household (vs. 32% for traditional TV)



## CTV Reaches diverse audiences

- 63% of purchase decision-makers
- 92% of gamers and 30% watch only CTV
- 65% of light TV viewers
- 61% of those born outside of Italy

## How are they watching?

- 37% of CTV households have two or more smart TVs
- 79% of CTV viewers typically watch with at least one other person
- 47% of CTV viewers are watching foreign language content
- 73% subscribe to one or more FASTs, 37% have two or more FAST services

Between January 2020 and May 2021, data from Samsung smart TVs showed traditional TV viewing in Italy rose by 22%, while CTV consumption increased by 45%.

SAMSUNG Ads

## CTV and Social Media

- 48% of CTV viewers do not watch professionally produced content on social media channels
- 58% CTV viewers pay more attention to an ad on CTV vs. social media (26%)

## Attitudes to advertising

CTV viewers

- 45% more likely to purchase the product after seeing the TV ad
- 46% more likely to share personal information to receive relevant advertising
- 79% more likely to pay attention to relevant messaging
- 22% more likely to buy brands that align with their values and opinions

# Spain

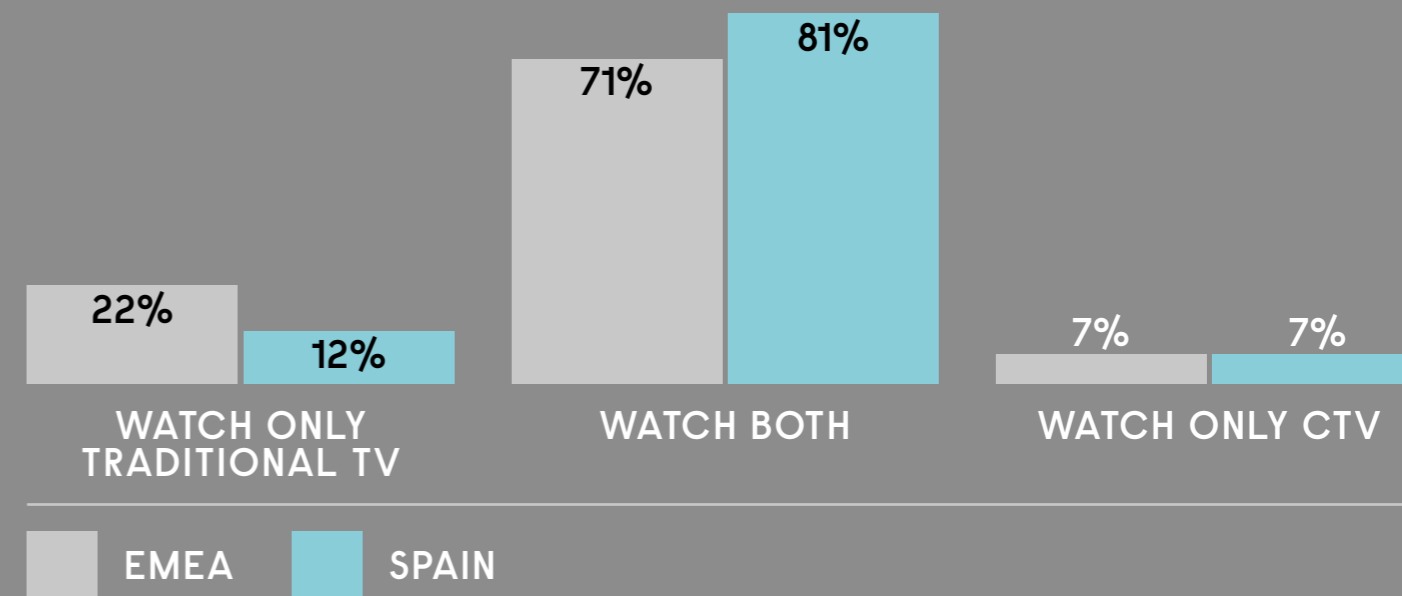
“The Spanish market has a particularly robust CTV ecosystem and, in comparison with the rest of the EU5, has the highest levels of CTV adoption, providing a special opportunity for brands to extend their usual TV reach. In fact, a growing percentage of the population watch only CTV as opposed to traditional linear formats, showing the popularity of the format. This adoption is supported by the high penetration of smart TVs in Spanish households and the social appeal of communal streaming.

In general, the Spanish CTV audience is diverse and more reflective of the general population than traditional TV viewers, who are disproportionately older than their CTV counterparts. CTV viewership is especially strong in households with children and younger audiences, making it a vital component of future TV advertising strategy.”



**SARA BULUGGIU**  
MD ITALY, SPAIN & MENA AT MAGNITE

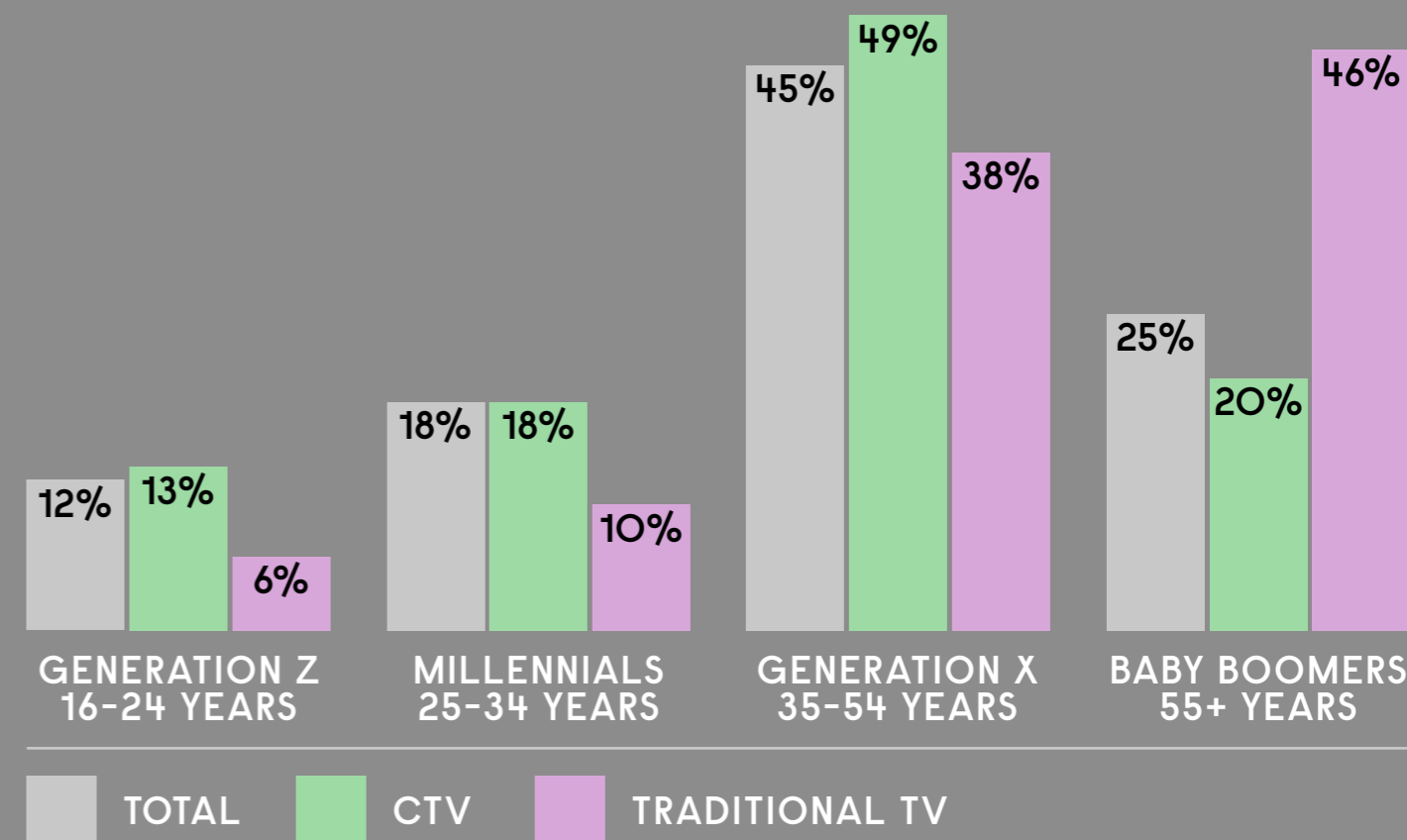
## Who Are Spain's CTV Viewers?



### Age

CTV is watched by all age groups across Spain and is more representative of the Spanish population than traditional TV. In contrast, traditional TV significantly over delivers against the older Boomer demographic.

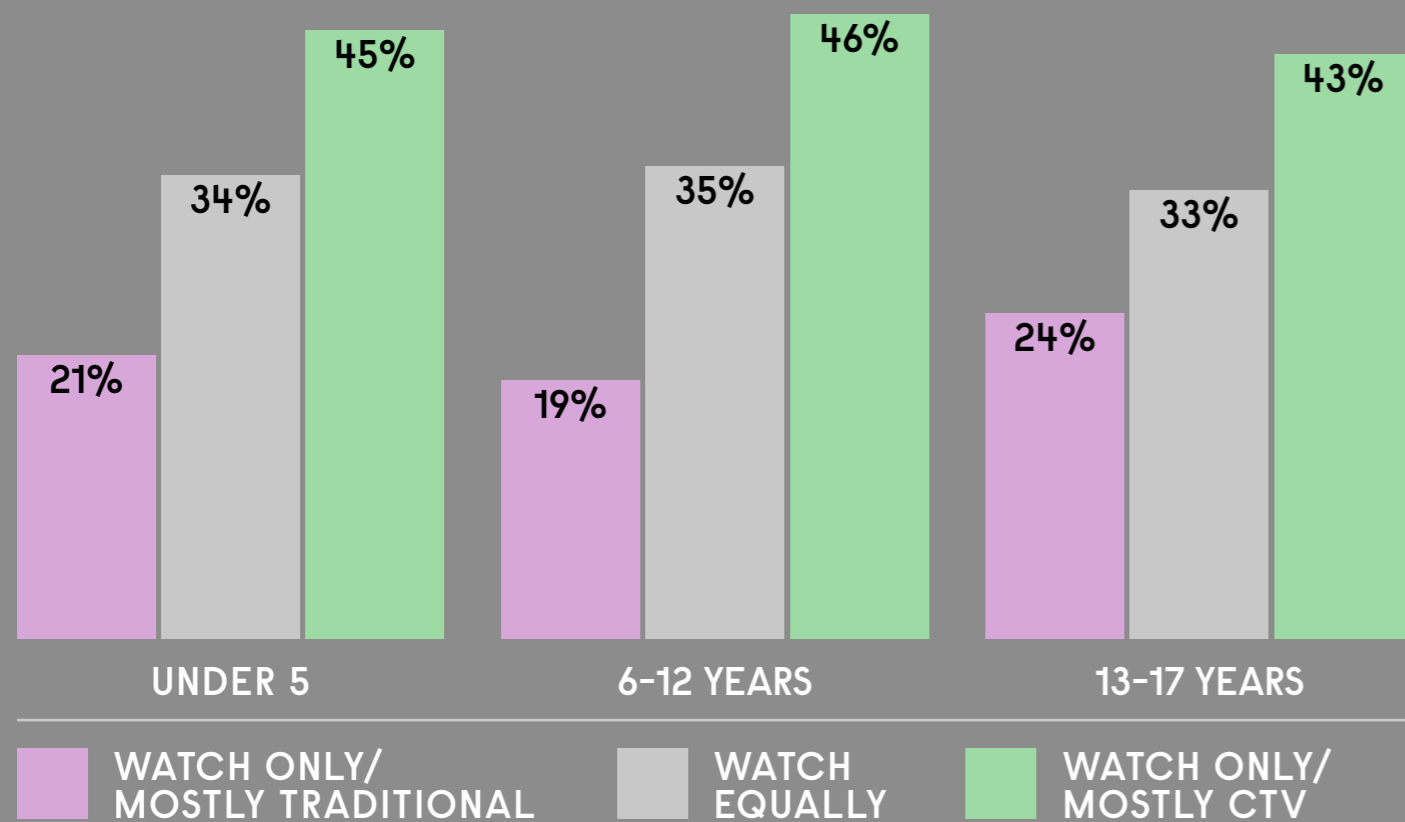
→ Median Age: CTV - 41, Traditional TV - 52



## Households with children

Parents are more likely to be found on CTV, especially households with teens: 43% of households with teens watch mostly streamed content.

→ 50% of CTV viewers have kids in the household (vs. 32% for traditional TV) which aligns with the population profile in Spain



## CTV Reaches diverse audiences

- 75% of purchase decision-makers
- 95% of Gamers and 23% watch only CTV
- 69% of light TV viewers
- 77% of those born outside of Spain

## How are they watching?

- 42% of CTV households have two or more smart TVs
- 86% of CTV viewers typically watch with at least one other person
- 40% watch foreign language content
- 53% subscribe to one or more FASTs, 22% have two or more FAST services

Between January 2020 and May 2021, data from Samsung smart TVs showed traditional TV viewing in Spain rose by 15%, while CTV consumption increased by 51%.

SAMSUNG Ads

## CTV and Social Media

- 52% of CTV viewers do not watch professionally produced content on social media channels
- 58% of CTV viewers pay more attention to an ad on CTV vs. social media (27%)

## Attitudes to advertising

CTV viewers vs. traditional TV viewers

- 150% more likely to purchase the product after seeing the TV ad
- 45% more likely to share personal information to receive relevant advertising
- 54% more likely to pay attention to relevant messaging
- 30% more likely to buy brands that align with their values and opinions

# What does this mean for advertisers?



Television advertising remains one of the most compelling areas for brands to invest in. The rapid adoption of CTV viewing has led to better services for consumers and provided a scaled solution for advertisers looking to supplement their traditional TV buying. This has strengthened the entire TV ecosystem and delivered new diverse audiences essential for businesses looking to future-proof their TV strategies.

CTV allows advertisers to connect with audiences that have become harder to reach through traditional TV and develop addressable, privacy-centric planning – including a greater emphasis on the use of first-party customer data and contextual targeting.

The impact of CTV as an advertising medium comes from its ability to efficiently reach any audience type, making it an excellent complement to traditional TV in engaging not only the mainstream, but incremental or niche audiences. CTV is for Everyone – which is why CTV should be considered a “must have” inclusion on any television-based media plan.

Want to know more?  
Contact your Magnite representative for details or email [emeadf@magnite.com](mailto:emeadf@magnite.com)



**GRAEME LYNCH**  
VP DEMAND, EMEA AT MAGNITE

# Definitions

## **AVOD**

Ad-supported Video On Demand. A streaming video service that offers consumers access to a catalogue of on-demand content and contains advertisements.

## **CTV**

Connected Television. A television set connected to the internet through the built-in capabilities of a smart TV, streaming device, or gaming console, which enables the viewing of video content streamed to the large screen.

## **FASTs**

Free Ad-supported Streaming TV services.

## **IPTV**

The delivery of premium video or TV content over an IP network rather than through traditional, terrestrial, satellite or cable television formats. It offers the ability to stream live or on-demand content via a connected device.

## **Light TV Viewers**

TV viewers who watch 10 or less hours of TV content a week.

## **Professionally Produced Content**

Premium quality content produced by movie studios, networks, and TV production companies. Not user generated.

## **Streaming/streamers**

Video delivered to TV audiences via the internet. Streamers are people who watch television, movies, and video content through an internet connection.

## **Smart TV**

An Internet-enabled TV set that includes free and paid streaming apps. A smart TV eliminates the need for a separate set-top box or streaming device to receive television and video content via the internet.

## **Traditional TV**

Television watched through a cable or satellite set-top box, or over the air digital antenna.

# Methodology

Statista conducted a quantitative survey through an online access panel (computer-assisted web interviews, or CAWI). The questionnaire was mobile enabled. The target group was television consumers in France, Germany, Italy, Spain and the UK, aged 16 years and older, including the 65+ age category, who watch television regularly (at least seven hours a week).

Quota sampling per country was used according to gender, age, and region. The total sample size was n=5,000 (n=1,000 per country).

To increase the number of interviews within the "CTV only" target group, an additional boost sample of 200-280 respondents per country within the "CTV only" target group was collected to ensure proper representation.

### **SURVEY TIME FRAME:**

23RD JUNE TO 9TH JULY 2021.



# About Magnite

We're Magnite (NASDAQ: MGNI), the world's largest independent sell-side advertising platform. Publishers use our technology to monetize their content across all screens and formats including CTV, online video, display, and audio. The world's leading agencies and brands trust our platform to access brand-safe, high-quality ad inventory and execute billions of advertising transactions each month. In April 2021 we acquired SpotX to further enhance our CTV business and better help our clients in this rapidly growing market. Anchored in sunny Los Angeles, bustling New York City, mile high Denver, historic London, and down under in Sydney, Magnite has offices across North America, EMEA, LATAM, and APAC.

To find out more information about this research, or to see other insights from Magnite, please visit <https://www.magnite.com/research/>

Alternatively, please contact [corpcomms@magnite.com](mailto:corpcomms@magnite.com)





# About Statista

Statista Q is dedicated to all individual and data-related projects in the areas of market research, market and competitor analyses, forecast and modelling, data analytics, data insights management and data visualization. With a high level of methodological competence and the extensive expertise of more than 50 analysts, industry experts and market researchers, Statista Q helps to make customer decisions more fact-based and therefore more successful. As a full-service market research institute, Statista Q is embedded in the Statista network: in addition to the know-how of one of the leading data platforms, you can also benefit from our in-house design department as well as from our strategy consultancy nxt statista.

Learn more about Statista Q and our market research expertise at <https://q.statista.com>.

