The Quarterly U.S. SVOD Tracker (1Q 2022)

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First Quarter 2022 U.S. SVOD: Key Takeaways

In order to better analyze the U.S. consumer's structural shift to increased streaming behavior, we worked with HarrisX, a leading market research and consulting company that specializes in online polling & data analytics and focuses on digital and direct to consumer strategies. HarrisX conducts a monthly survey on video consumption in the United States and in this report we are leveraging data from 22,839 respondents between January and March. Our key findings are as follows:

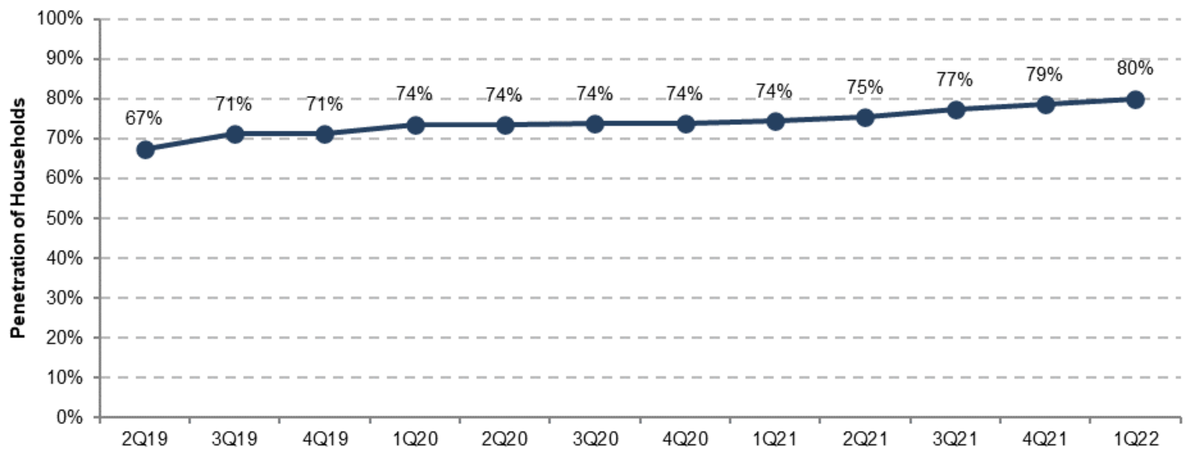
- In the U.S., streaming's penetration of households ticked up by 100 basis points Q/Q to 80% driven by gains in homes that have cut the Pay TV cord. As aggregate penetration reaches maturity, we are seeing growth in new subscriptions at new services like Peacock and Paramount+ vs. the more established services of Netflix, Hulu, Disney+ and Amazon.
- At these legacy services, the number of new original episodes that premiered in the first quarter appears to be a step-down vs. the more vibrant debuts from the fourth quarter of 2021. In contrast, Peacock (thanks to key events – Olympics and Super Bowl) and Paramount+ appear to have ramped up their new content offerings to gain share.
- We see a problem brewing in the data. When asked why consumers cut the cord and moved to streaming, the issue of "Pay TV being too expensive" may be quickly bypassed by the rationale that "all the shows I currently watch are on streaming." As more linear network owners (e.g., Disney, Comcast, Paramount and now Warner Bros. Discovery) shift more and more original content to their streaming services they are potentially creating a "tragedy of the commons" moment when all these individual actions end up collectively damaging a common good. In this case, the linear TV bundle.
- On Tuesday night, Netflix reports 1Q 2022 results and we are essentially in line with consensus and have not adjusted for the impact of any business losses due the war between Russia and Ukraine. Our U.S. data shows that Netflix had more limited content success this quarter, which should limit UCAN subscriber growth to nearly 200K net additions. The risk is to the downside especially in light of the recent rolling price hikes. In contrast, we see above-consensus strength in the APAC region due to Japan, South Korea and price cuts in India.

Streaming Penetration Hits 80% Driven By Those Outside the Linear Bundle

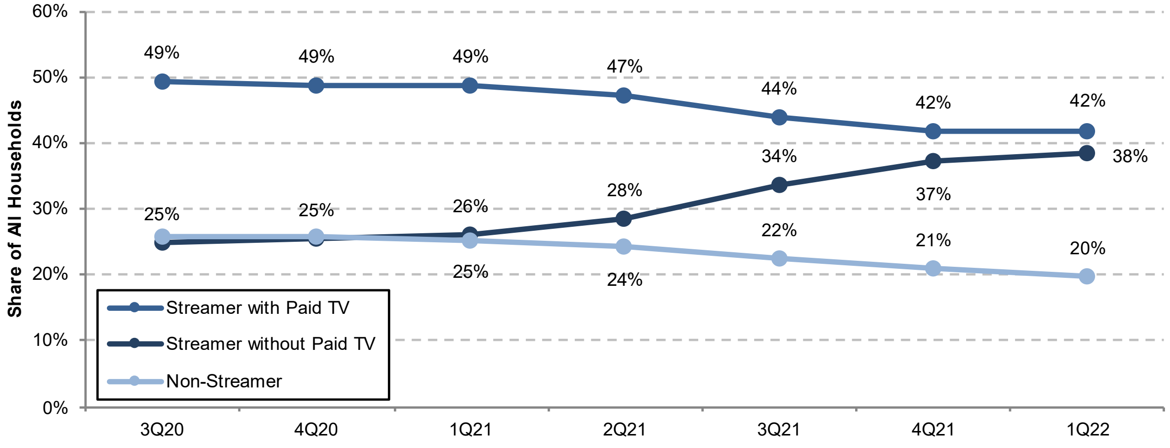
Streaming penetration of U.S. households increased 100 bps to a new quarterly high of 80% from 4Q21 to 1Q22. This growth came from households outside of the Pay TV bundle, with the share of streaming households without a Pay TV subscription increasing by 100 bps this quarter as well. The share of streamers who subscribe to Pay TV was flat quarter over quarter.

As we will see later in this presentation, Nielsen data also confirms that the growth of streaming is sourced by households who have cut the cord.

Streaming Penetration of U.S. Households



Cord Cutting



Source: HarrisX, MoffettNathanson analysis

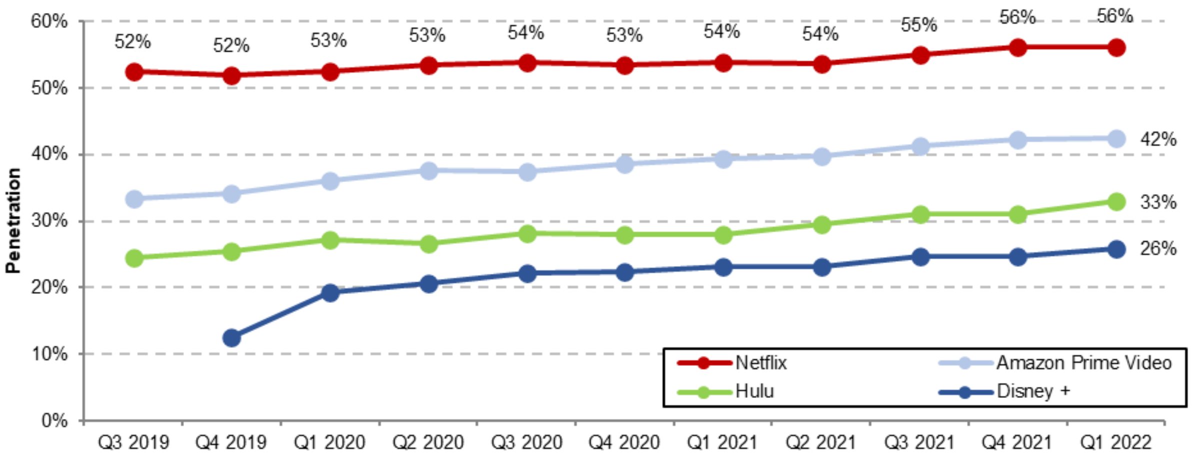
The Giants Stall as Smaller Services Grow

Netflix and Amazon Prime Video were flat in a quarter that saw tremendous growth for the each of the smaller services (except discovery+ and Apple TV+). The star of these charts is the rocket ship that is Peacock, whose 235 bps Q/Q growth places it nipping at the heels of Disney+ (though this survey data is capturing its AVOD tier, exaggerating its SVOD tier's growth). Peacock was helped in part by event programming of the Winter Olympics and the Super Bowl.

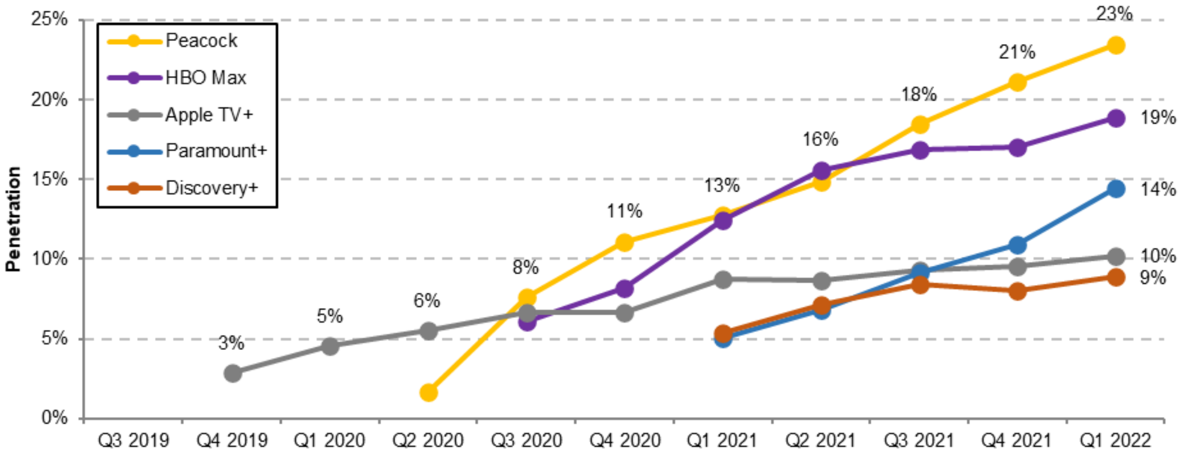
Paramount+ also had a great quarter, growing 350 bps Q/Q. Hulu and HBO Max grew a decent 175 bps and 185 bps, respectively, and Disney+ grew 120 bps.

Discovery+ and Apple TV+ both continued to struggle to gain momentum, despite the latter carrying streaming's first Best Picture winner at the Oscars. Perhaps a *Coda* bump will materialize in Q2.

Which of these paid services do you or someone in your household currently use to stream content?



Which of these paid services do you or someone in your household currently use to stream content?



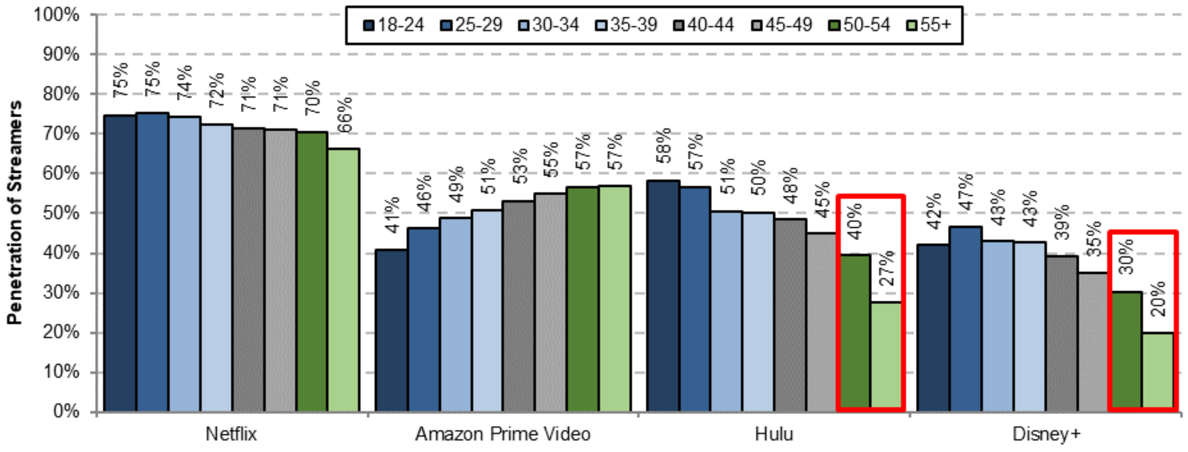
Source: HarrisX, MoffettNathanson analysis

Age of Users – The Hulu & Disney+ Issue

Each streamers' distribution of viewers across age groups remained fairly consistent from last quarter. As such, we continue to raise the concern that both Hulu and Disney+ show a remarkable drop-off with older users. Both services did increase their penetration of people aged 55+ by 2% Q/Q but remain heavily skewed towards younger audiences.

Netflix remains both number one across all ages and fairly evenly disturbed across all ages. Amazon Prime Video and Peacock skew slightly older, while HBO Max's slightly younger skew should not be greatly helped by a bundling with discovery+.

Which of these paid services do you or someone in your household currently use to stream content? (1Q22)



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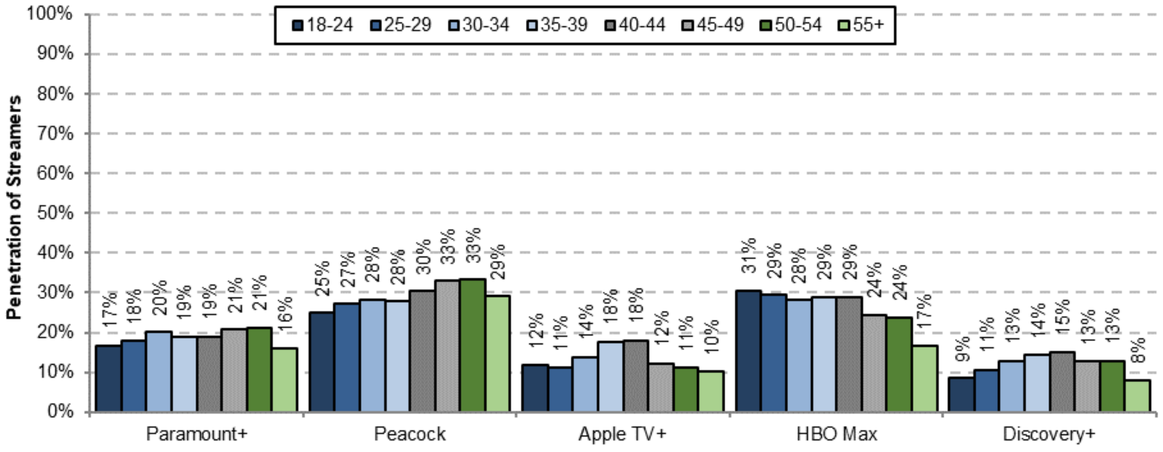


Source: HarrisX, MoffettNathanson analysis

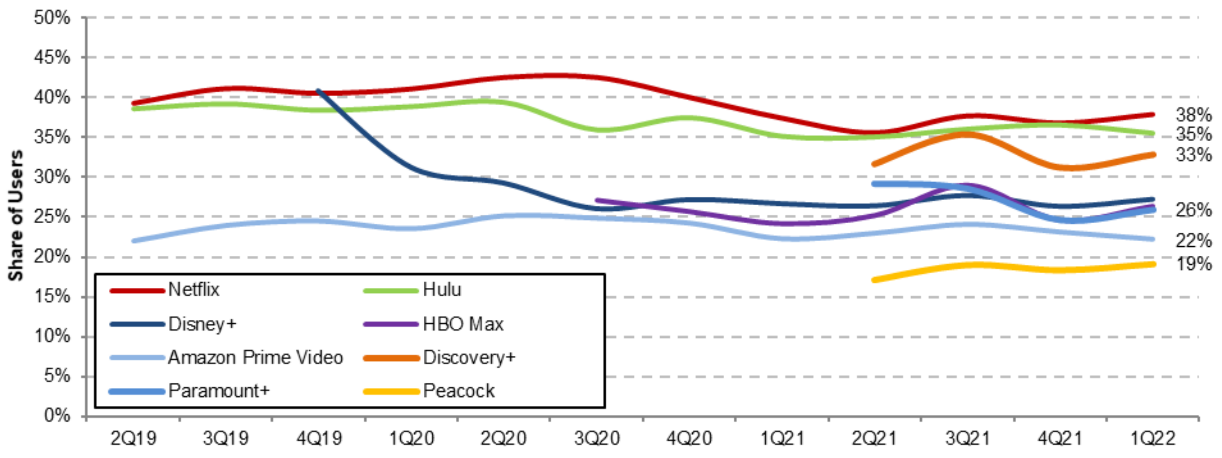
Daily and Weekly Viewership

Discovery+ may not have a lot of subscribers, but those who do subscribe get a lot of utility out of their monthly fee. Daily usage among its users is third only to Netflix and Hulu.

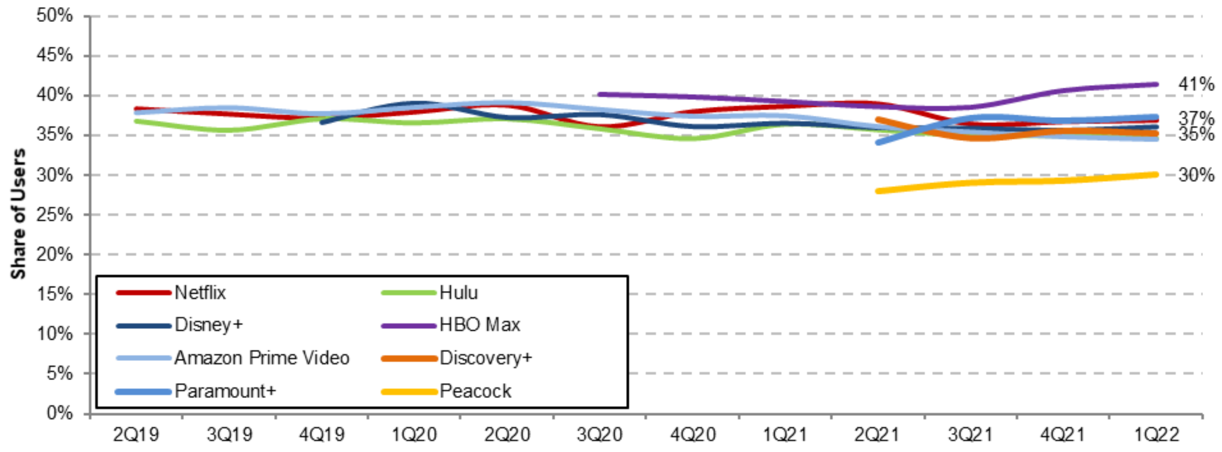
Peacock lags the rest of the pack in terms of both daily and weekly usage among its users, clocking in at 19% and 30% for each of those respective metrics. Amazon Prime Video also draws relatively weak usage numbers, coming in second to last for both metrics.

26% of HBO Max users use the service daily, putting it in the lower-middle of the bunch, but HBO Max leads in terms of weekly usage by a decent bit at 41%.

In the past month, which services did you or someone in your household use daily?



In the past month, which services did you or someone in your household use several times a week?



Source: HarrisX, MoffettNathanson analysis

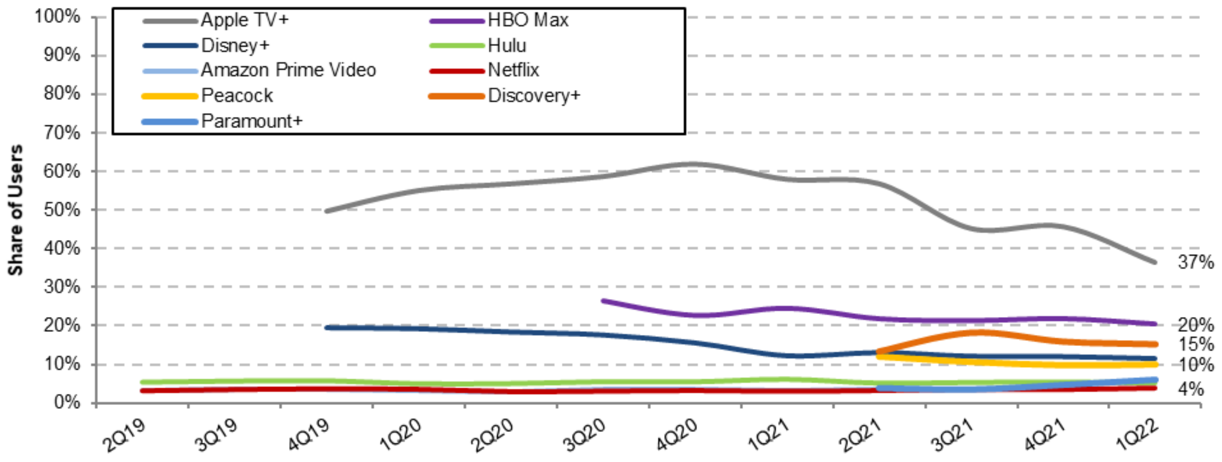
Who Pays for the Service?

It seems people are finally starting to pay for Apple TV+, with the share of users who access the service through a promotional package dropping 930 bps Q/Q. Even with this dramatic drop, more than a third of its users are still watching for free. How many will continue "subscribing" once doing so means paying a monthly fee remains a concerning question for the service.

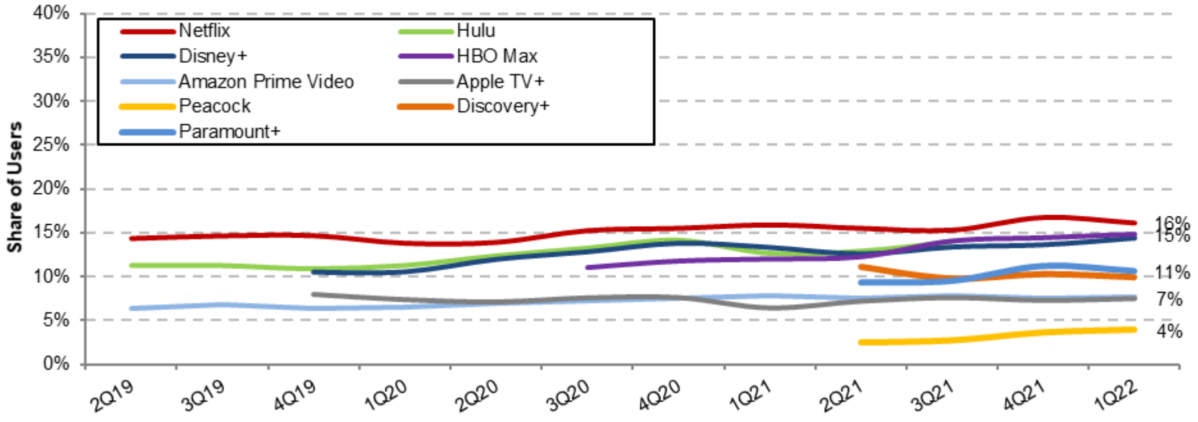
The same question applies to both HBO Max and discovery+, whose 20% and 15% respective share of users who receive access through a promotional package remained flat from the previous quarter.

Netflix has started cracking down on password sharing in Latin America and may start doing so too in the U.S. where 16% of its users continue to access the service through another household's account (down 60 bps Q/Q). Peacock has the lowest share of password sharing at 4%, possibly reflective of this data's partial capture of its free, AVOD tier.

Access is included in a promotional package for another service



Someone outside of my household pays for the streaming platform



Source: HarrisX, MoffettNathanson analysis

Why Stream vs. Pay for the Bundle?

The top reason that consumers give for cutting the cord and moving to streaming is that subscription TV is too expensive. Yet, as we will show in the next slide that rationale is becoming less important. The second most important driver of this change is that "all the shows I currently watch are available on streaming services." This factor is quickly rising in importance.

Why Do You Stream as a Replacement for Pay TV?

Why you stream as a replacement for Paid TV	Hulu		Amazon Prime		Netflix	
	Q1 2022	Q/Q	Q1 2022	Q/Q	Q1 2022	Q/Q
Subscription television is too expensive	30%	-2%	34%	-4%	31%	-2%
I don't watch enough television to pay for it	13%	-5%	13%	-2%	15%	-3%
All the shows I currently watch are available on streaming services	23%	6%	20%	3%	20%	1%
The convenience of it	13%	-1%	14%	2%	14%	1%
I don't own a television	1%	-1%	1%	0%	1%	0%
To avoid watching commercials	9%	0%	9%	1%	9%	1%
To binge watch content	11%	2%	8%	2%	9%	1%
Other	1%	0%	0%	-1%	1%	0%

Source: HarrisX, MoffettNathanson analysis

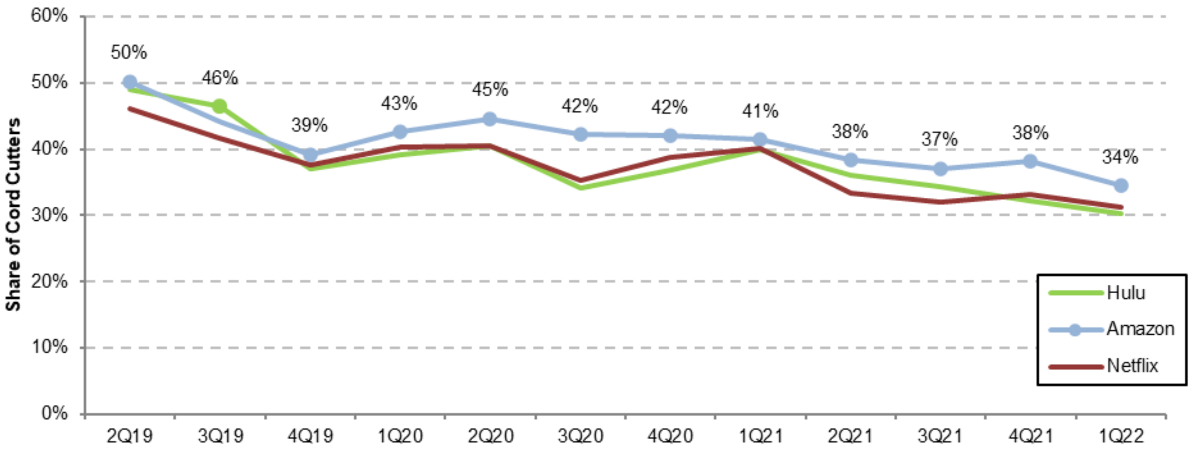
Why Cut the Cord and Stream?

In fact, the share of people canceling their Pay TV subscription in favor of a streaming service due primarily from cost concerns has dropped significantly since 2019.

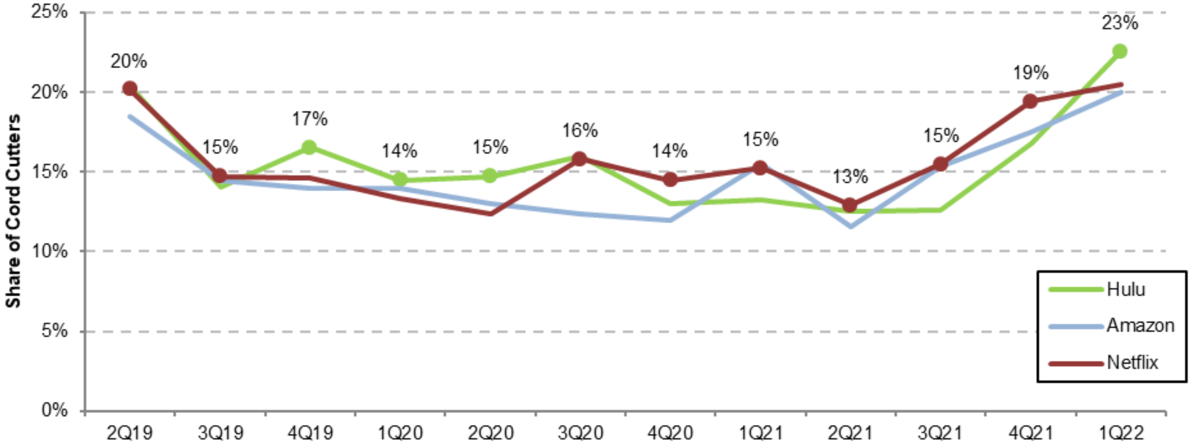
Over the past year, we are seeing that content offerings are an increasingly important driver of streaming penetration. Two things that we should note:

1. The pandemic delayed the availability of content on many services and now as these new offerings are hitting streaming platforms, consumers are increasingly realizing that there is a content bounty on streaming.
2. The disappearance of original content on linear is a potential tragedy of the commons situation. Linear network owners are individually moving more and more original content to streaming, which collectively weakens the viability of the bundle for all. It is akin to the mistake made when linear network owners individually agreed to sell content to Netflix, which ultimately weakened the linear system that paid their bills.

Switched from Pay TV to streaming because of cost



Switched from Pay TV to streaming because of content



Source: HarrisX, MoffettNathanson analysis

Overlap of Streaming Service Usage

We discussed last quarter the Disney Bundle's mixed record, with relatively low levels of Disney+ users watching Hulu and vice versa. The situation remains unchanged Q/Q, with the share of Disney+ users also using Hulu remaining flat at 61% and the share of Hulu users using Disney+ declining 75 bps to 48%. While Disney's hands are tied in terms of how much it can integrate the services until its joint ownership with Comcast is untangled, it is still surprising how few Disney+ and Hulu users Disney has managed to convince to upgrade to the Bundle.

Beyond that, Netflix remains the base of the subscription bundle from which each other service is additive. Overlap between HBO Max and discovery+ increased slightly (20% of HBO Max users also use discovery+ – up 200 basis points Q/Q – and 51% of discovery+ users now also use HBO Max – up 300 basis points). The share of Paramount+ users who also use Peacock remains interestingly high.

Overlap of Streaming Service Usage (1Q22)

	Netflix	Amazon Prime	Hulu	Disney+
Netflix	100%	80%	81%	87%
Amazon Prime	61%	100%	63%	68%
Hulu	47%	49%	100%	61%
Disney+	40%	42%	48%	100%

Overlap of Streaming Service Usage (1Q22)

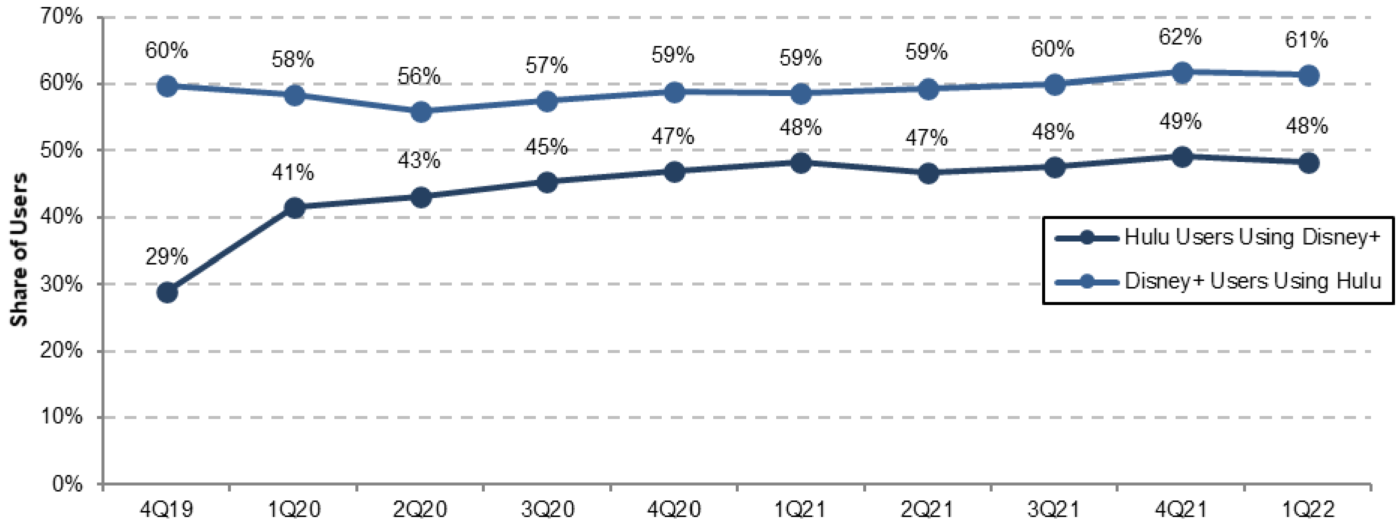
	Netflix	Apple TV+	HBO Max	Peacock	Discovery+	Paramount+
Netflix	100%	83%	86%	77%	83%	82%
Apple TV+	15%	100%	25%	18%	28%	26%
HBO Max	35%	56%	100%	43%	51%	52%
Peacock	32%	42%	44%	100%	53%	58%
Discovery+	13%	24%	20%	20%	100%	30%
Paramount+	21%	36%	33%	36%	48%	100%

Source: HarrisX, MoffettNathanson analysis

Checking in on the Disney Bundle

After a heavy marketing campaign, the Disney Bundle, which offers Disney+, Hulu, and ESPN+ at a reduced rate, seems to have plateaued in terms of its penetration of Disney+ and Hulu users. A steady ~60% percent of Disney+ users use Hulu each quarter and ~48% of Hulu users also use Disney+.

Disney+ and Hulu Overlap Over Time



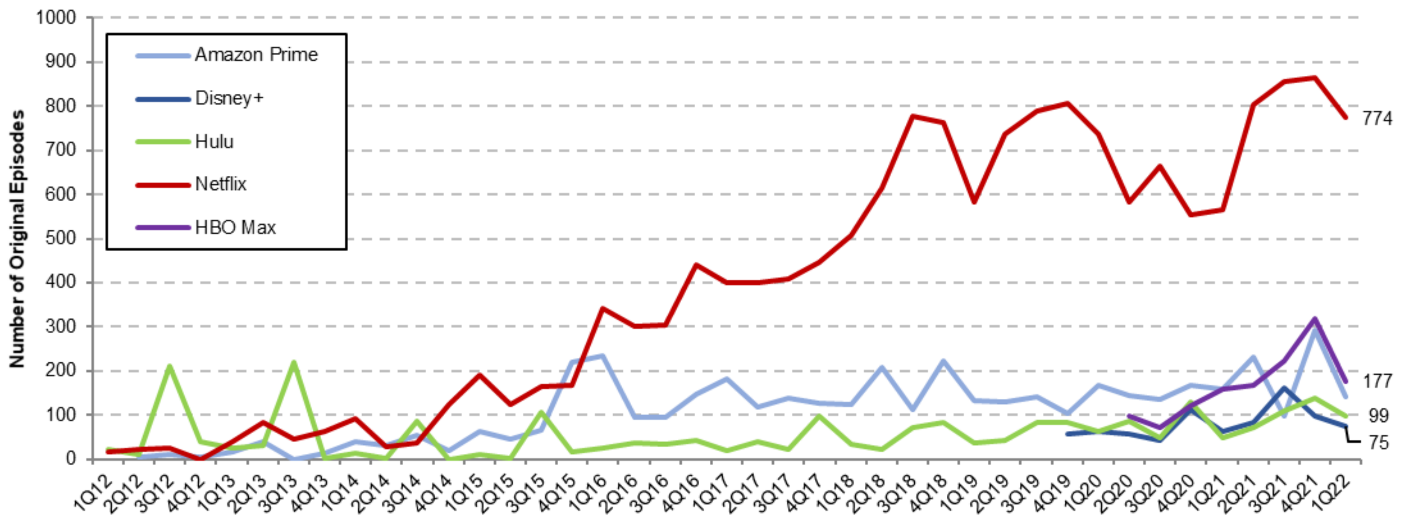
Source: HarrisX, MoffettNathanson analysis

First Quarter Content Slates Dipped

Content output declined across the board this past quarter, though Netflix remains in a league of its own.

HBO Max retains its second-place position in terms of number of original episodes released, though whether it will continue to be Best of the Rest under new management remains to be seen. Hulu and Disney+'s content slates continued to be surprisingly bare in Q1.

Number of Original Content Episodes per Quarter



Source: HarrisX, MoffettNathanson analysis

Turning to Nielsen Data: A look at U.S. TV Viewership

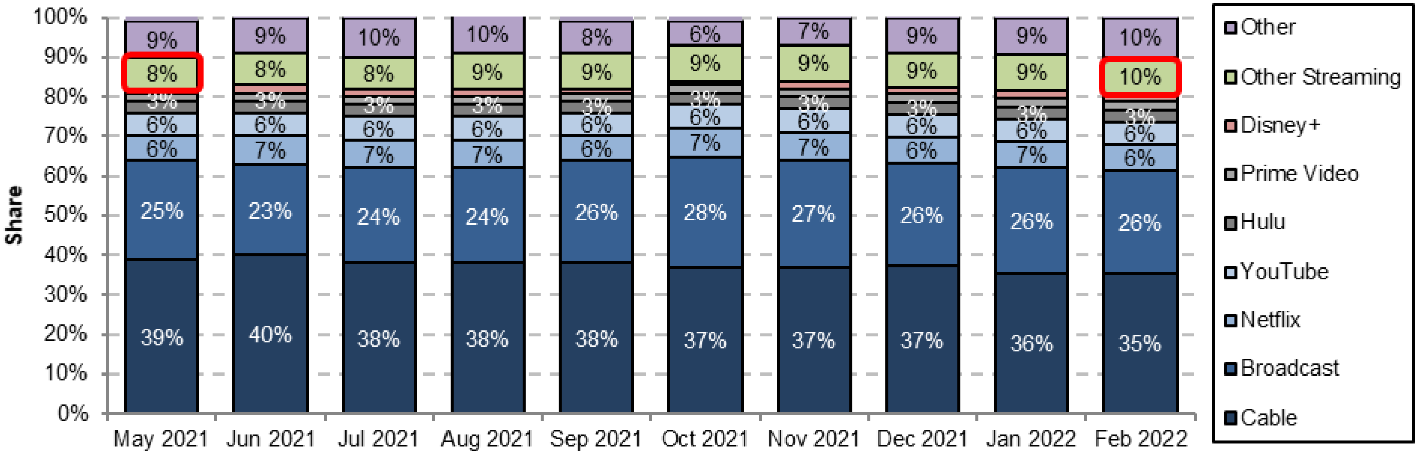
Over the past 10 months, big picture, linear TV viewing across broadcast and cable has averaged about 60% to 65% of all P2+ viewing time, while streaming has remained relatively consistent around ~28%.

However, since October we have seen linear's share of viewing slip from 65% down to 61% in February, the lowest level since The Gauge began.

At the same time, streaming has grown it's share by +100 bps to reach 29% the past two months. Note the remaining 6% to 10% of television consumption labeled "Other" contains streaming via cable set top boxes, which does not credit respective streaming distributors but has continued to grow.

Among the streamers, Netflix and YouTube remain the consistent leaders with 6% to 7% of total television consumption followed by Hulu at 3%. Disney and Amazon Prime Video have bounced around between 1-2% of all viewing time, and the long tail of "Other Streaming" reached a high of 10% in February.

Nielsen The Gauge – U.S. Television Minutes Viewed



	May 2021	Jun 2021	Jul 2021	Aug 2021	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022
Linear TV	**64%**	**63%**	**62%**	**62%**	**64%**	**65%**	**63%**	**63%**	**62%**	**61%**
Streaming	**26%**	**28%**	**28%**	**28%**	**28%**	**28%**	**28%**	**28%**	**29%**	**29%**

Source: Nielsen, MoffettNathanson analysis

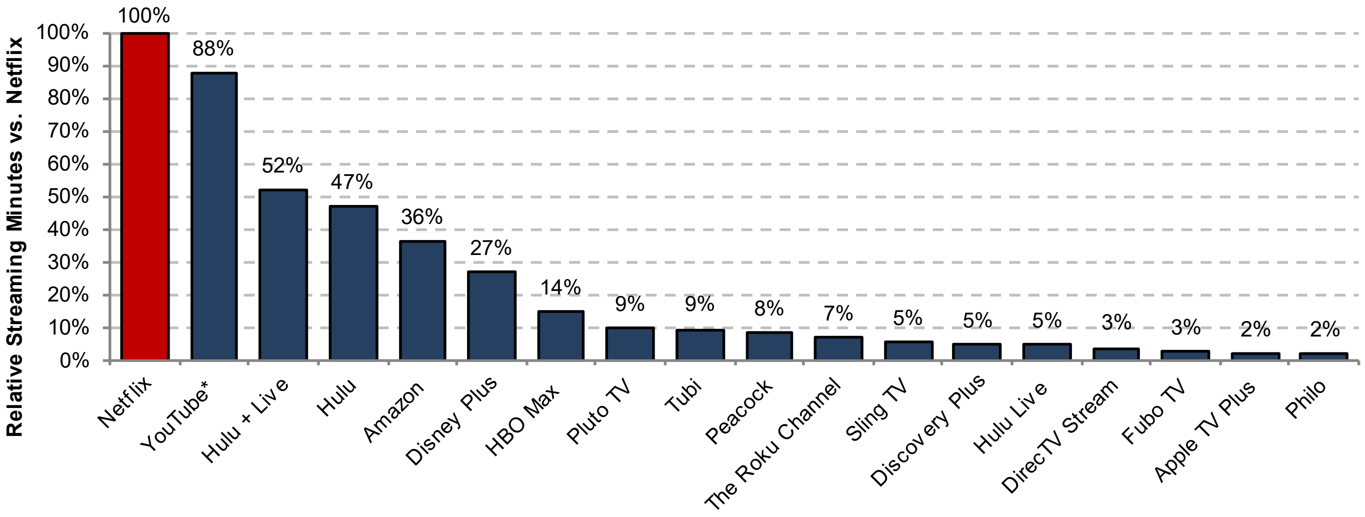
U.S. Streaming Minutes By Service

Beyond the top 5 streaming services (Netflix, YouTube, Hulu, Amazon Prime Video and Disney+) there is a meaningful drop off in U.S. TV time viewed across the other notable platforms. Yet, we have seen HBO Max begin to gain traction, growing time viewed as a percentage of Netflix by +200 bps since last quarter from 12% in 4Q21 to 14% in 1Q22.

Meanwhile, the leading ad-supported streaming services Pluto TV and Tubi had 9% of time viewed relative to Netflix in the quarter, while The Roku Channel lagged behind at 7%.

Peacock (including all tiers) had 8% of time viewed vs. Netflix in 1Q, discovery+ had 5% and Apple TV+ had 2%, while the vMVPDs all came in around 2-5%.

1Q 2022 U.S. Streaming Minutes Relative vs. Netflix



Source: Nielsen, MoffettNathanson analysis

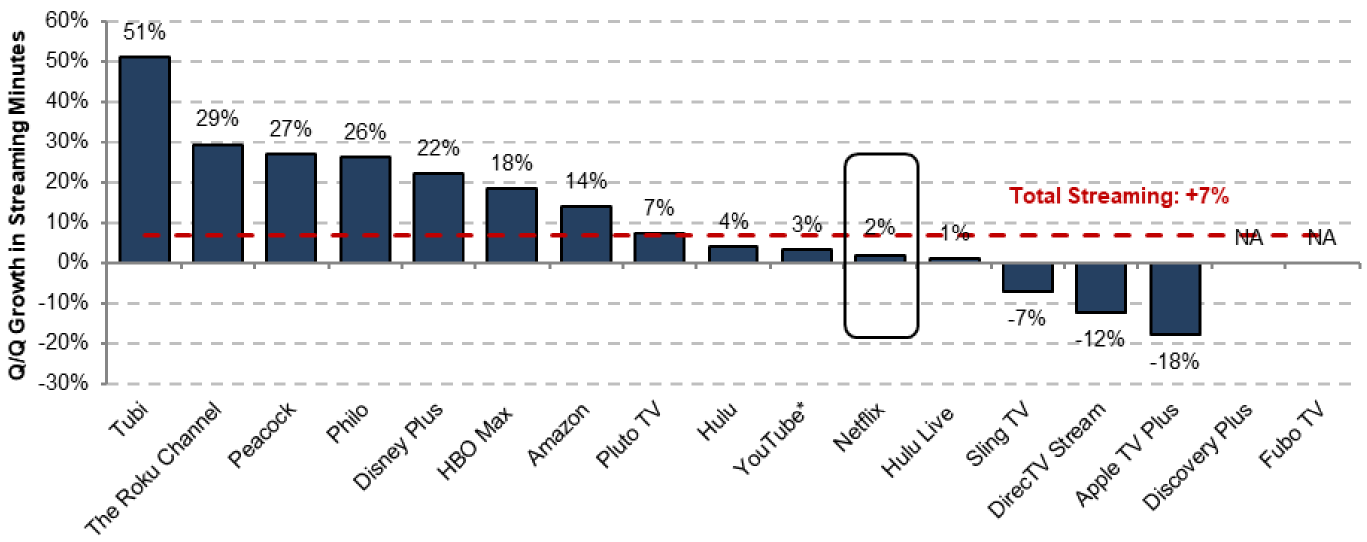
U.S. Streaming Minutes By Service

Looking at sequential growth in streaming minutes, time viewed across the tracked platforms ticked up +7% from 4Q21 to 1Q22.

Tubi dominated the pack, growing time viewed by +51%. The Roku Channel also grew viewership by +29%, while Pluto grew only +7% (albeit still the largest among the three).

Other meaningful growers include Peacock (+27%), Disney+ (+22%) and HBO Max (+18%). Streaming industry leader Netflix grew viewership +2% in 1Q22 from a notably higher base.

Q/Q Growth in U.S. Streaming Minutes (1Q22 vs. 4Q21)



Source: Nielsen, MoffettNathanson analysis

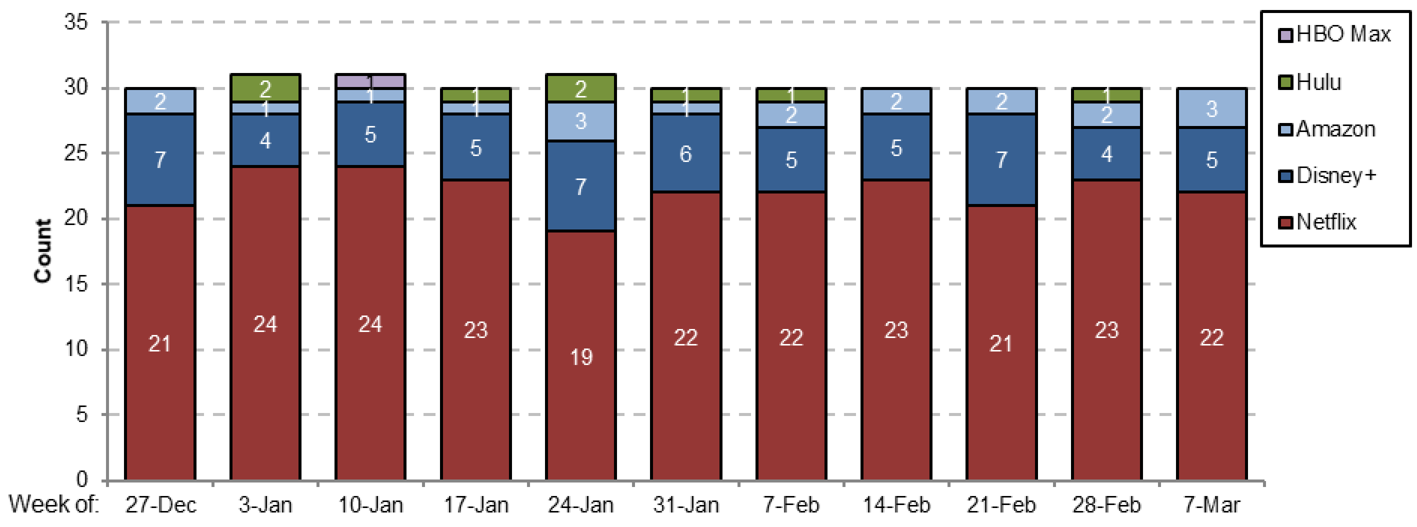
Top 10 Streaming Titles

Each week Nielsen publishes a list of the top 10 originals, acquired titles, and movies across all streaming platforms by minutes viewed. Out of the 30 possible slots across the three categories, more than 2/3rds routinely go to Netflix.

These numbers are pretty consistent from last quarter, with the biggest change being the absence of Apple TV+ who often had 1 title in the top 30 each week in Q4 thanks to *Ted Lasso*. Disney+ increased its weekly average presence from 4.7 titles to 5.5. Hulu's weekly average decreased from 1.2 titles to 0.7. Netflix fell slightly from 22.7 average weekly titles to 22.2. Amazon experienced the largest growth going from 0.8 average weekly titles last quarter to 1.8 in Q1.

Several weeks sum to 31 due to top titles appearing on multiple platforms, such as *Charlie and the Chocolate Factory*, which appeared on both Netflix and HBO Max (and is responsible for the latter's sole appearance on this chart).

1Q 2022 Number of Originals, Acquired Series and Movies in Nielsen's U.S. Top 10 Lists by Platform



Source: Nielsen, MoffettNathanson analysis

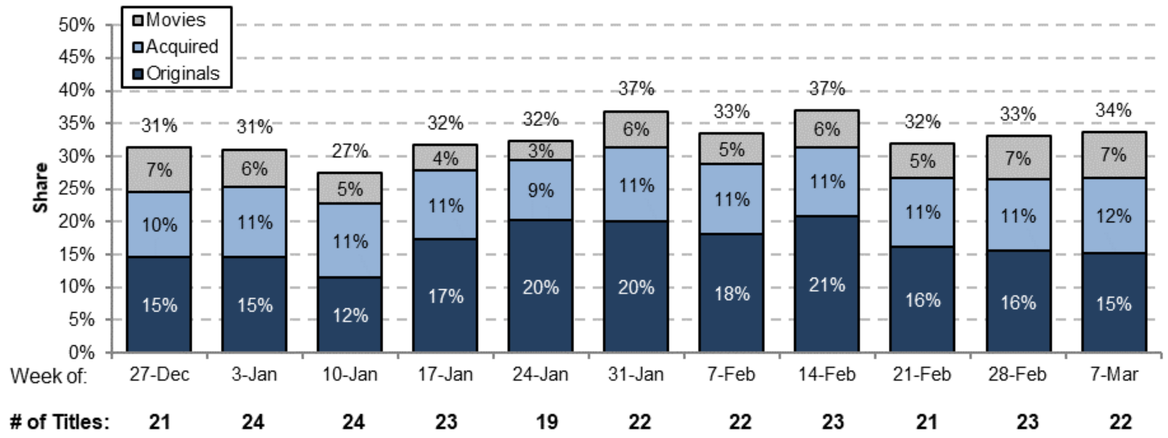
Top 10 Titles Share of Viewership

We added up the number of viewing hours that Netflix's top ten shows generated each week and compared it to the underlying number of hours reported by Nielsen for Netflix in 1Q 2022.

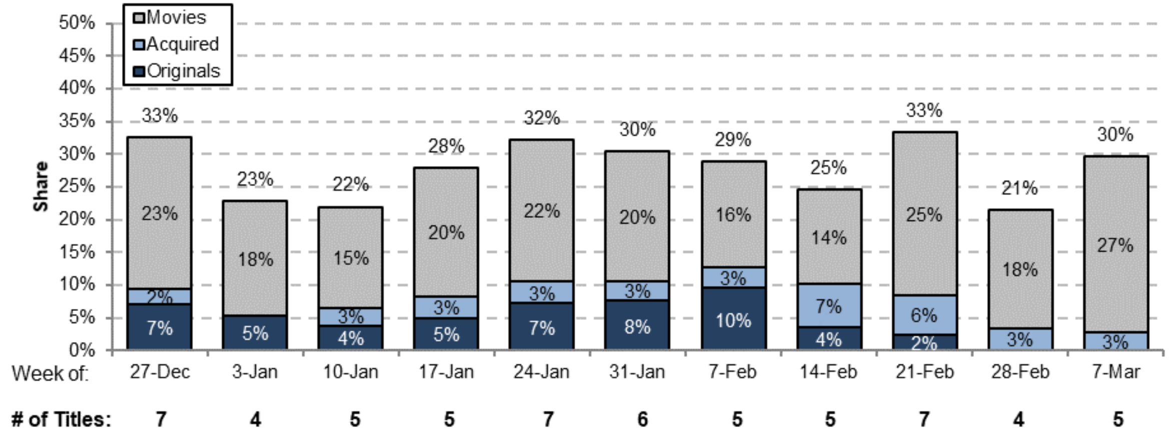
According to our analysis, these top shows represent anywhere between 27% to 37% of Netflix's viewership. The most volatile part of these weekly consumption patterns continues to be the release of new original content, which equates to anywhere from 12% to 21% of time spent on Netflix.

Compared to the broad content slate of Netflix, Disney+'s limited appearances in Nielsen's Top 10 Lists is a byproduct of their smaller content offering. Across originals, acquired content and movies, Disney+ only had a handful of titles (around 4 to 7) break into the Top 10 lists vs. Netflix's 19 to 24. Yet, these titles – primarily Disney+ movies – drove a meaningful share of engagement on Disney+, accounting for 21% to 33% of total weekly time viewed on the service.

1Q 2022 Netflix Share of U.S. Streaming Minutes from Top Originals, Acquired Series and Movies



1Q 2022 Disney+ Share of U.S. Streaming Minutes from Top Originals, Acquired Series and Movies

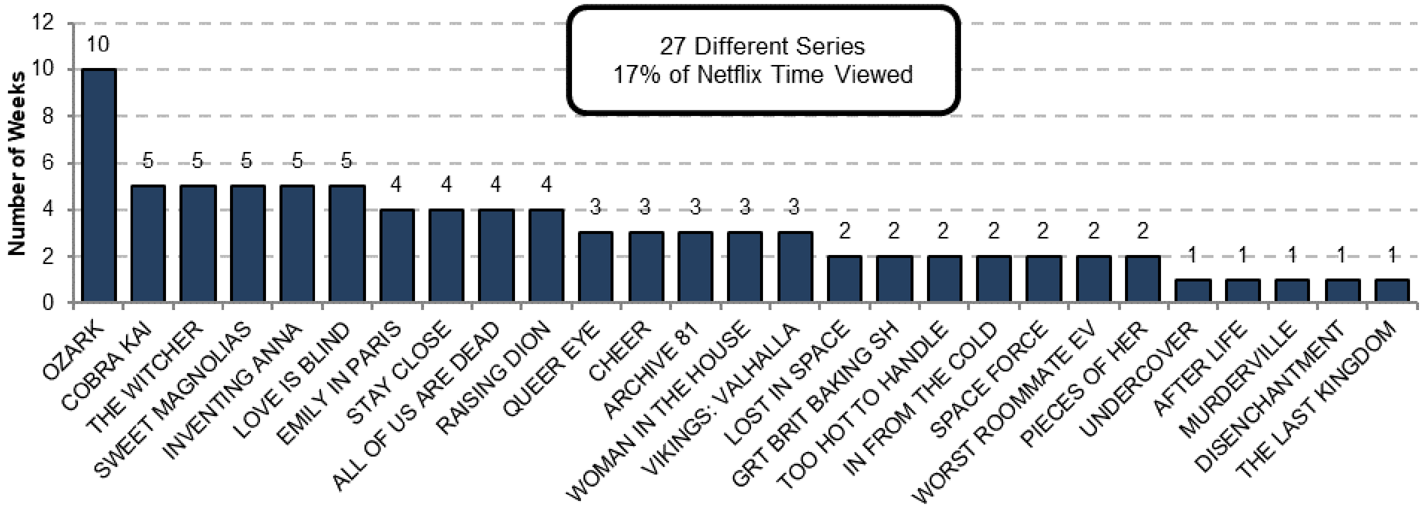


Source: Nielsen, MoffettNathanson analysis

Netflix Top Originals

27 different Netflix original series cracked Nielsen's top 10 list this quarter. These series collectively accounted for 17% of all time viewed on Netflix. While most titles' jaunts on the list are brief, *Ozark* has proven to have a remarkable shelf life for a Netflix title, appearing on the list every week of the quarter for which we have data.

Netflix Originals by Number of Appearances in Nielsen Top 10 (1Q22)



Source: Nielsen, MoffettNathanson analysis
Note: Latest data through week of March 7, 2022.

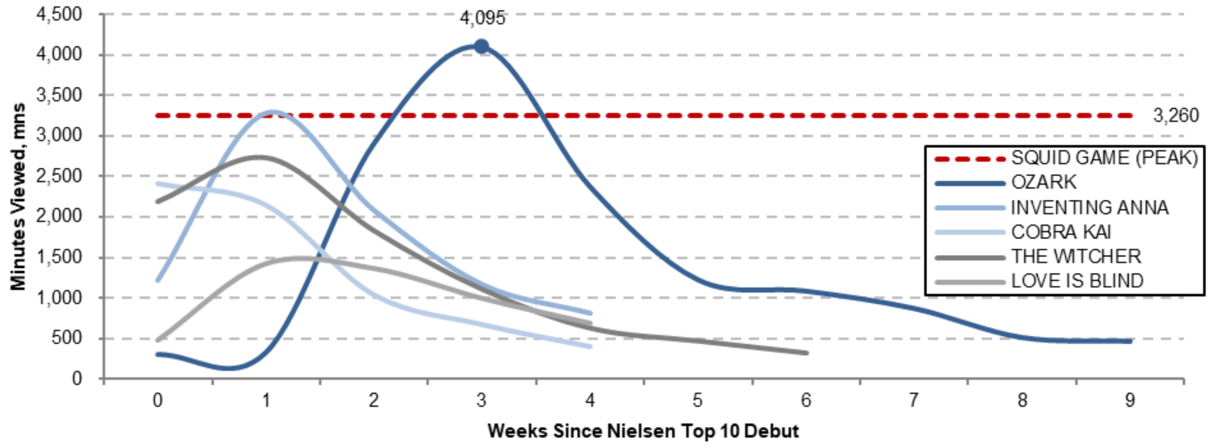
Viewership of Netflix Top Originals

We also analyzed how viewership trended for Netflix's top shows to better understand how consumers engage with originals.

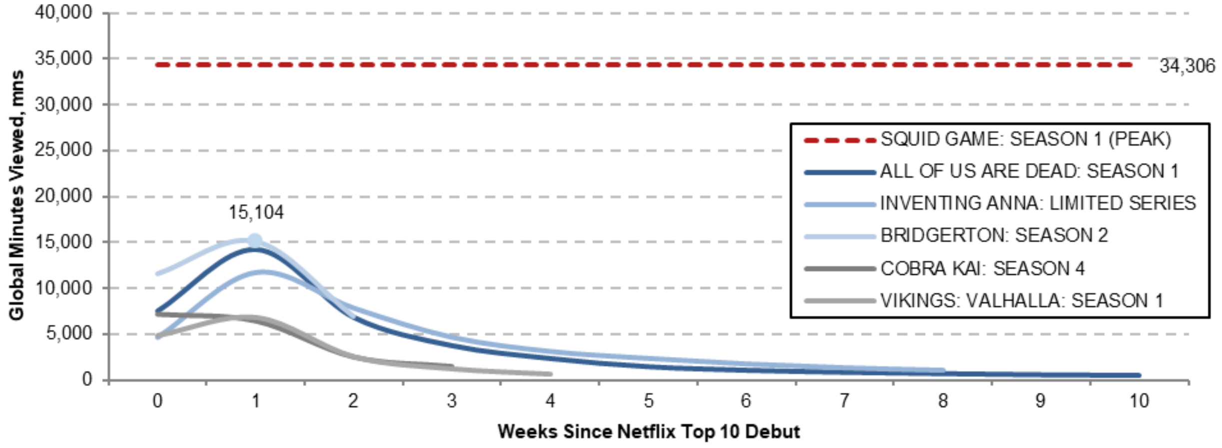
Although the newest season of *Ozark* debuted January 21st, according to Nielsen it broke into Netflix's top shows in the U.S. the week of January 3rd as viewers caught up on prior seasons. In fact, the season 4 launch fell at the tail end of Week 2 on this chart, before viewership peaked in Week 3, even surpassing the prior peak of *Squid Games.* Yet, as we can see with each show, viewership tails off fairly quickly after spiking.

Even using Netflix's own data on Global Top 10 shows how quickly viewership of top series erodes after release. Since the beginning of 3Q 2021, no show has come close to *Squid Game* at the global level, and similar to Nielsen's data on U.S. viewership, Netflix's data shows that top originals drive an initial surge in consumption before quickly fading around the world.

1Q 2022 Top Netflix Originals U.S. Time Viewed by Week Since Debut on Nielsen's Top 10 List



Netflix Global Top 10 – Global Minutes Viewed for Top TV Series Since 3Q 2021



Source: Nielsen, MoffettNathanson analysis
Note: Latest data through week of March 7, 2022. Squid Game peak added for reference.

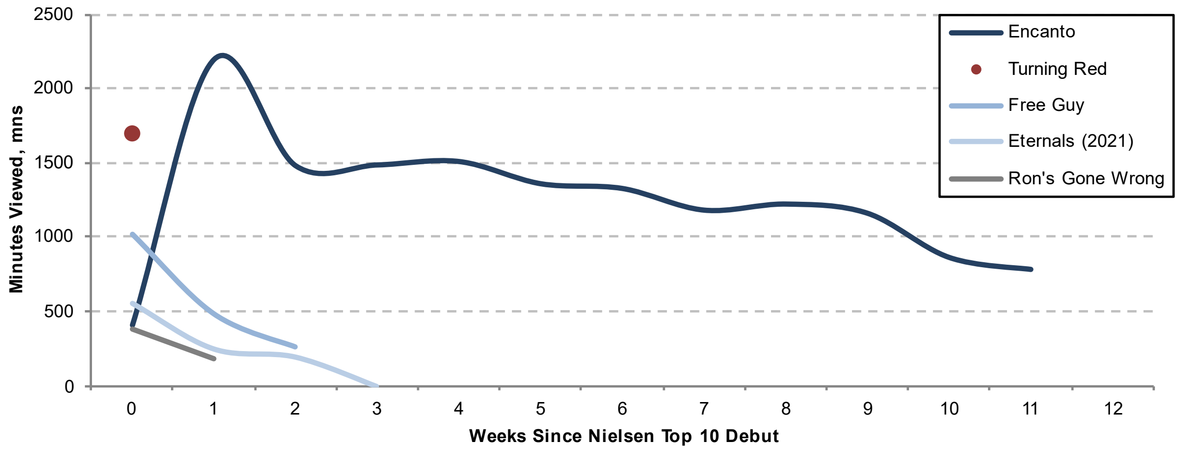
Viewership of Disney+ Top Movies

As Disney+ is still ramping up its original content production, it continues to lean more heavily on films to drive usage.

Encanto broke into the Nielsen top 10 list in the final week of 2021 and sustained strong viewership throughout the first quarter, especially compared to *Free Guy, Eternals* and *Ron's Gone Wrong*, which followed the usual pattern of tailing off quickly after launch.

Turning Red debuted on Disney+ the week of March 7th, the latest available week of data, and as such we only have one week of viewership data for Pixar's latest foray into direct-to-Disney+ releases. The launch week numbers were strong, and it will be interesting to see the trend in the coming weeks given the continued performance of fellow animated movie *Encanto*.

1Q 2022 Top Disney+ Movies U.S. Time Viewed by Week Since Debut on Nielsen's Top 10 List



Source: Nielsen, MoffettNathanson analysis
Note: Latest data through week of March 7, 2022.

Nielsen and Netflix

According to Nielsen penetration data, 67% of subscribers to eight of the largest MVPDs also subscribe to Netflix, in line with 4Q 2021. This steady penetration comes as the MVPDs shed an estimated 1.5 million subscribers in 1Q 2022, leading to 1.1 million fewer households who subscribe to both Netflix and these MVPDs.

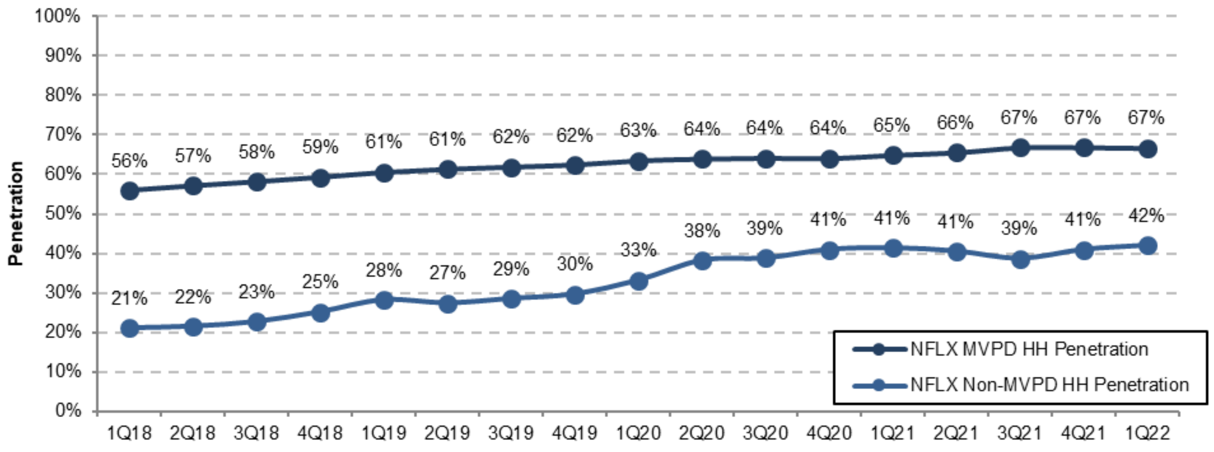
We predict Netflix offset this by increasing its penetration of non-MVPD households by +100 bps, driving net gains across the combined buckets of +100k subscribers.

While Netflix's penetration of MVPD households has plateaued, it has accelerated its penetration of non-MVPD households. Yet, a large portion of its gains among non-MVPD households are likely coming from those that cut the cord and already subscribed to Netflix.

Netflix Subscribers and Penetration of MVPDs

	4Q21			1Q22			Variance	
in mns	Netflix Penetration	Television Households	Netflix Subscribers	Netflix Penetration	Television Households	Netflix Subscribers	Television Households	Netflix Subscribers
Comcast	76%	18.2	13.7	75%	17.7	13.3	-2.4%	-2.8%
Charter	65%	15.8	10.3	65%	15.6	10.2	-1.2%	-1.0%
DirecTV	62%	11.1	6.8	61%	10.7	6.6	-3.3%	-3.6%
Dish	51%	8.2	4.2	50%	7.9	4.0	-3.3%	-4.9%
Verizon	77%	3.6	2.8	77%	3.6	2.8	-1.3%	-1.6%
Cox	68%	2.6	1.8	69%	2.6	1.8	-3.6%	-2.5%
AT&T	72%	1.9	1.4	71%	1.8	1.3	-2.0%	-3.4%
Altice USA	70%	3.0	2.1	70%	2.9	2.0	-1.5%	-2.1%
Total	**67%**	**64.4**	**43.1**	**67%**	**62.9**	**41.9**	**-2.3%**	**-2.6%**
Rest of US	**41%**	**58.0**	**23.7**	**42%**	**59.5**	**25.0**	**2.6%**	**5.2%**
Total Paid Members	**55%**	**122.4**	**66.8**	**55%**	**122.4**	**66.9**	**0.0%**	**0.2%**

Netflix Penetration of MVPD vs. Non-MVPD US TV Households



Source: Nielsen, Company reports, MoffettNathanson estimates and analysis

Netflix Forecast

We are leaving our 1Q 2022 Netflix estimates unchanged and acknowledge that we haven't adjusted the quarter for the impact of Netflix's shutdown in Russia.

We estimate Netflix added 3.0 million subscribers in 1Q, relatively in line with consensus (2.9 million). Yet, we are above consensus in APAC and to a lesser extent UCAN, while we are below consensus in EMEA.

We also leave our Netflix revenue and earnings estimates unchanged. For 1Q 2022 we forecast revenue growth of +11% to $7.98 billion (+1% above consensus), operating income of $1.78 billion (in line with consensus) and EPS of $2.93 (+$0.04 above consensus.

Netflix Subscribers by Region

in mns	4Q20	1Q21	2Q21	3Q21	4Q21	1Q22E	Consensus 1Q22E	Variance
UCAN	73.9	74.4	74.0	74.0	75.2	75.4	75.3	0.1
EMEA	66.7	68.5	68.7	70.5	74.0	75.0	75.4	(0.4)
LATAM	37.5	37.9	38.7	39.0	40.0	40.4	40.4	(0.0)
APAC	25.5	26.9	27.9	30.1	32.6	34.1	33.6	0.4
Total Paid Subs	**203.7**	**207.6**	**209.2**	**213.6**	**221.8**	**224.8**	**224.7**	**0.1**
UCAN	0.9	0.4	(0.4)	0.1	1.2	0.2	0.1	0.1
EMEA	4.5	1.8	0.2	1.8	3.5	1.0	1.4	(0.4)
LATAM	1.2	0.4	0.8	0.3	1.0	0.4	0.4	(0.0)
APAC	2.0	1.4	1.0	2.2	2.6	1.5	1.0	0.4
Paid Net Sub Adds	**8.5**	**4.0**	**1.5**	**4.4**	**8.3**	**3.0**	**2.9**	**0.1**

Netflix Estimates vs. Consensus

in $, mns	1Q21	Estimates 1Q22E	Consensus 1Q22E	Variance
Total Revenue	7,163.3	7,979.4	7,932.7	1%
Y/Y		*11%*	*11%*	*(65 bps)*
Total Operating Income	1,959.9	1,776.6	1,772.5	0%
Margin	27.4%	22.3%	22.3%	8 bps
Y/Y		*-9%*	*-10%*	*(21 bps)*
EPS	$3.75	$2.93	$2.89	1%
Y/Y		*-22%*	*-23%*	*(90 bps)*

Source: Refinitiv Eikon, Company reports, MoffettNathanson estimates and analysis

HarrisX

About

HarrisX is a leading technology, research and consulting company that specializes in online polling & data analytics and focuses on the understanding of the connected consumer. The company has a fourteen-year history assessing public opinion and behavior in the telecom, media, and personal technology industries through syndicated and custom research services. Based in Washington DC and with offices in New York City, San Francisco, and Tampa, HarrisX runs the Mobile Insights (wireless focused) and Total Communication Surveys (TV/broadband/voice focused) and an array of other connected consumer surveys resulting in the largest syndicated TMT-focused consumer trackers in the U.S. Across its products, HarrisX's gathers data from nearly 100,000 monthly respondents. HarrisX, studies mobile behaviors through its Telephia.io behavioral data application, which captures actual smartphone usage data. For further detail on this study, contact Alex Chizhik at alex@harrisx.com or Dritan Nesho at dritan@harrisx.com. If you're interested in viewing other research by HarrisX's, please visit the HarrisX Marketplace.

Survey Methodology

The data in this report comes from the Streaming Media Panel of HarrisX's Total Communications Survey. The Total Communications Survey ("TCS") is a monthly survey that provides an understanding of the home communication and entertainment ecosystems among n=8,500 household decision makers aged 18+. TCS measures consumer attitudes and behaviors across TV, Internet, landline, and streaming services. The survey leverages data going back to 2007 to capture key performance indicators – such as consideration, perception & penetration, satisfaction metrics, willingness to recommend across service providers – and covers broad topic areas, such as loyalty, path to purchase, usage, switching and likelihood to switch, and customer service.

TCS is a recontact of Mobile Insights - the largest wireless survey tracker measuring attitudes and behaviours of mobile consumers. TCS data is weighted to be representative at the household level both nationally and regionally. Weighting parameters include service provider, age gender, marriage, income, owner/renter status, household size, and minority status.

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