

# Super Bundling

How Super Bundling is the secret weapon in the quest for subscriber growth and retention

## Who do European subscribers want to provide all-in-one subscription service?

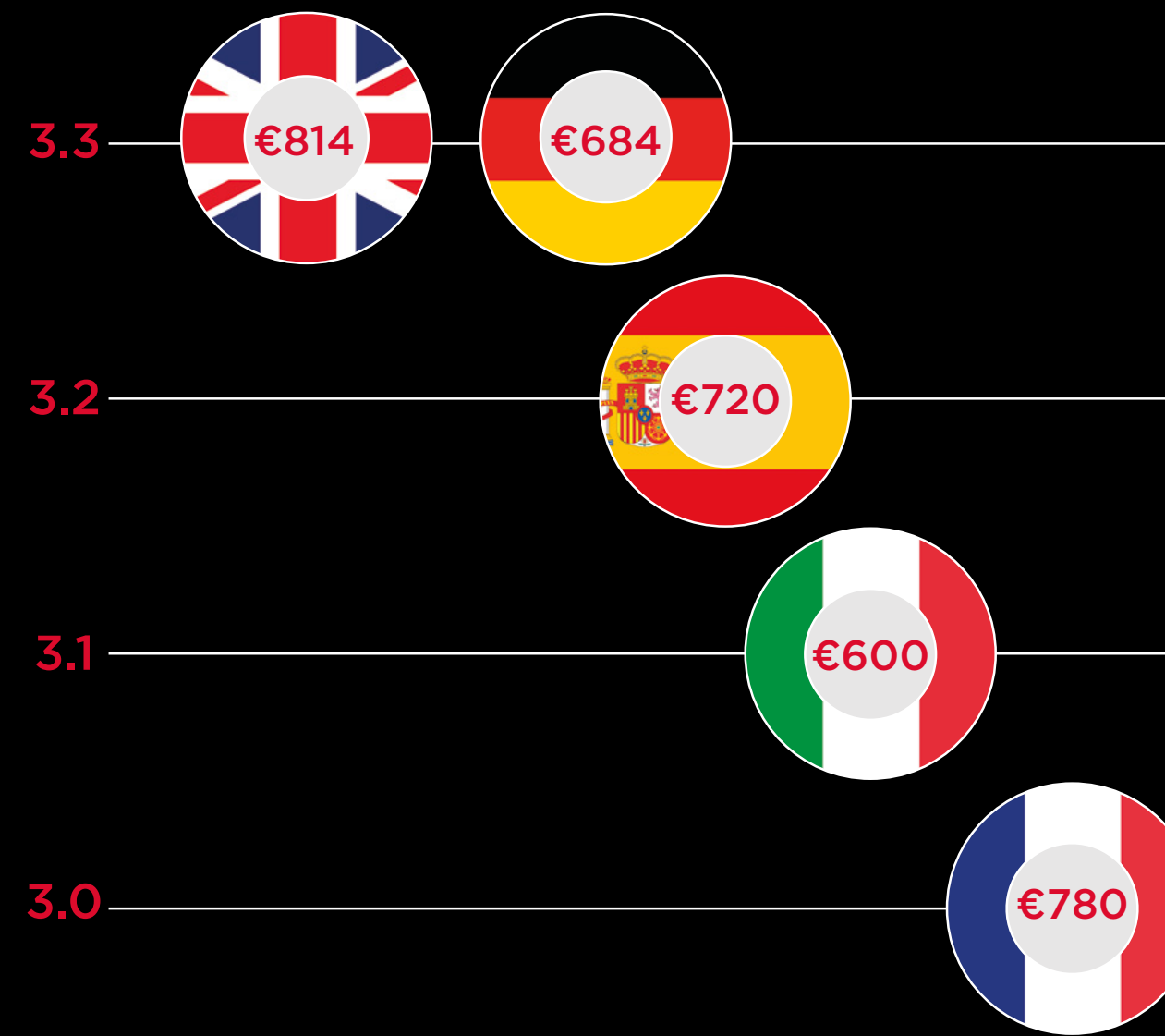
- 70% Mobile operator
- 36% Broadband provider
- 17% TV provider
- 16% Payment or wallet company
- 15% Bank or credit union
- 10% Retail
- 6% Social media



### Super Bundling promotes customer advocacy

56% of European subscribers would be more likely to recommend a provider that offers this service - rising to 61% in Spain.

## Average number of subscriptions per user and annual spend



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Subscriptions market value estimated to grow from \$593 billion in 2024 to nearly \$1 trillion by 2028

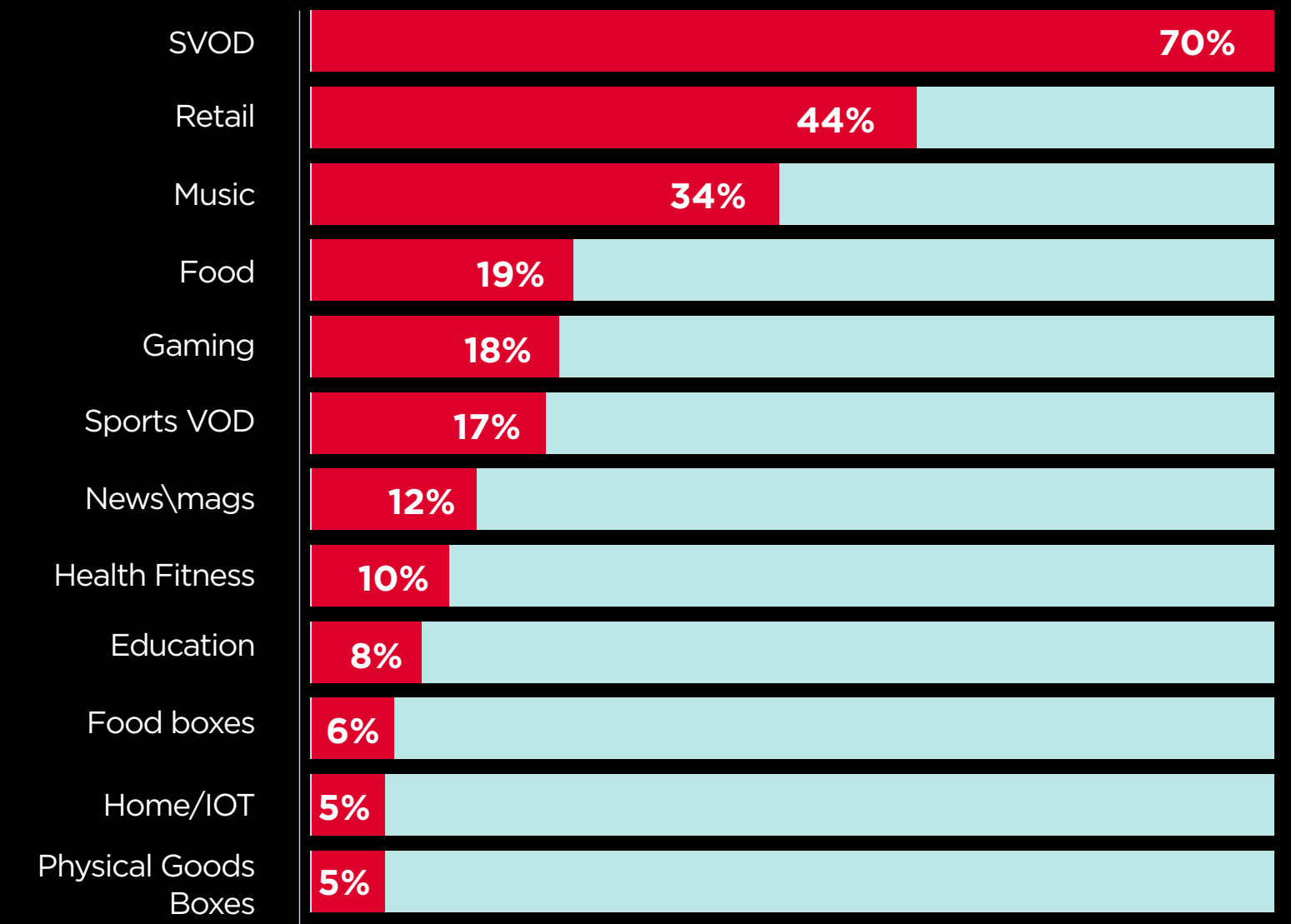
Source: Juniper Research

\$593  
BILLION

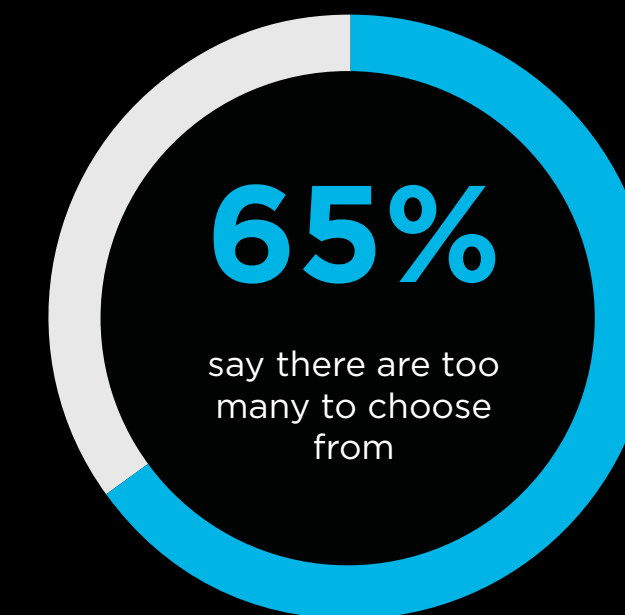
\$1  
TRILLION

## 7 out of 10 European subscribers have at least one Subscription Video-on-Demand (SVOD)

### Subscription variety in Europe

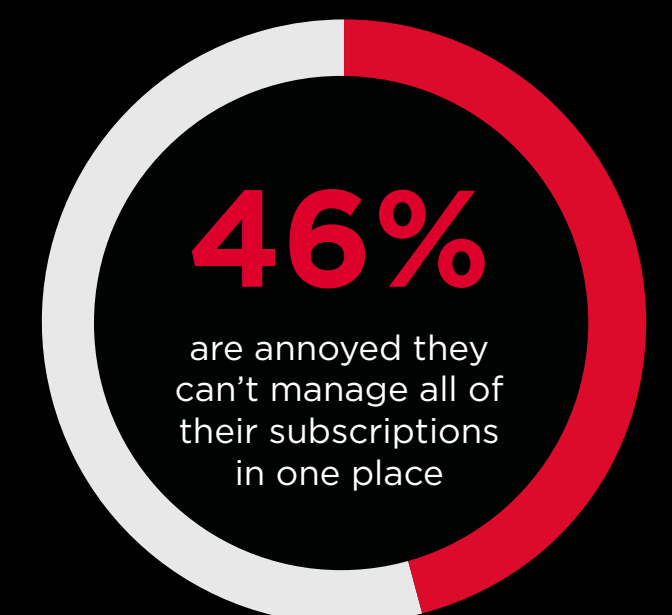


## European subscribers feel there are now too many subscription services to deal with



58%

Want **one single platform** to manage all their subscriptions



50%

Want ability to pay for **multiple subscriptions** via **one monthly bill**