

SUBSCRIPTION WARS: **Super Bundling Awakens**

Chapter 2 - Subscription habits by state



Subscriptions - State of the nation

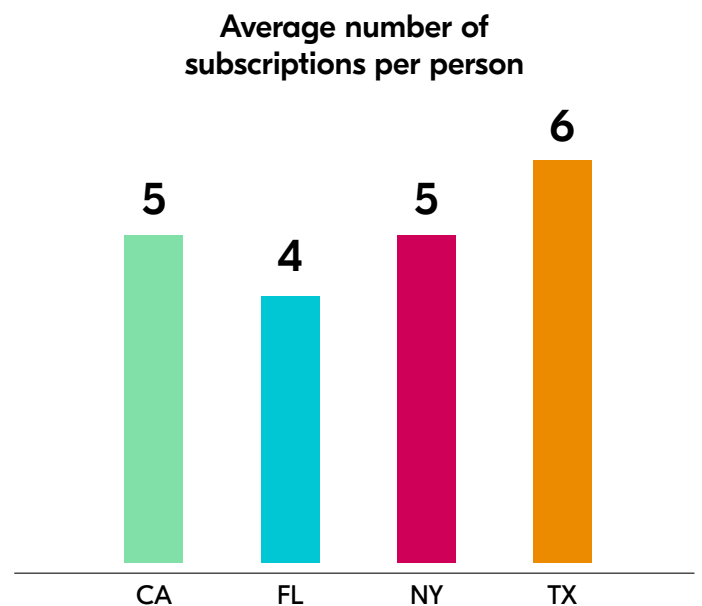
People living in Texas are spending more on subscriptions than those in any other US state, and also boast the highest number of sign-ups — with an average of six per subscriber — a third more than the national average of 4.5.

Inhabitants of the Lone Star State spend \$103 per month on subscription services — totalling over \$1,200 a year — \$300 more than the national average.

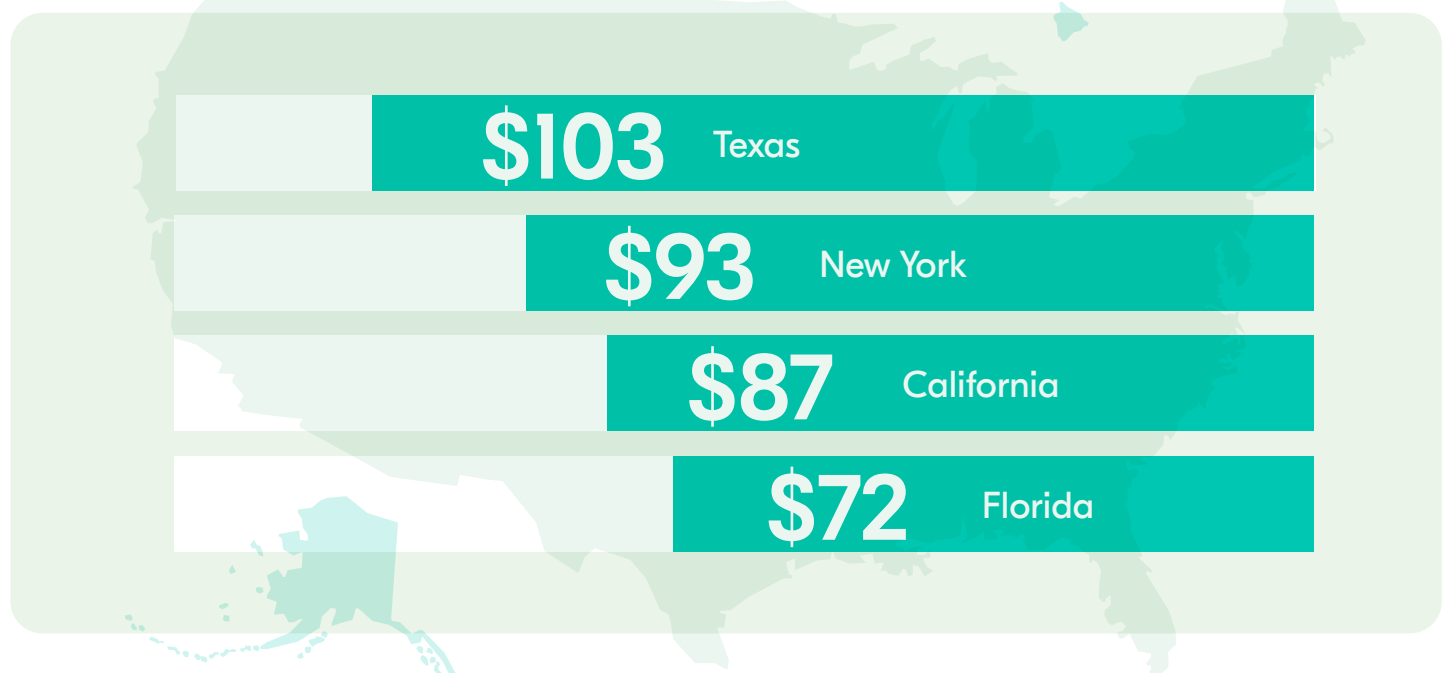
Subscribers in New York follow with \$93 per month and five subs per subscriber, whereas those in Florida spend just \$72 and have just four sign-ups each, just below the national average.

That's according to data from Bango, which surveyed 5,000 US subscribers, exploring their attitudes, behaviors, and the changing nature of the subscription economy.

The survey reveals a number of key differences in spending habits and the types of subscriptions people sign up to, state by state.



Monthly subscription spend (\$)



TV, retail, music and gaming top subscription types by popularity

When looking at subscription types, nuances begin to emerge between certain states.

Subscribers in Texas were found to be the most likely to have subscriptions in nine out of twelve categories covered in the study, including music, gaming, and health and fitness, with New York coming in a close second in gaming, health and fitness and SportsVOD.

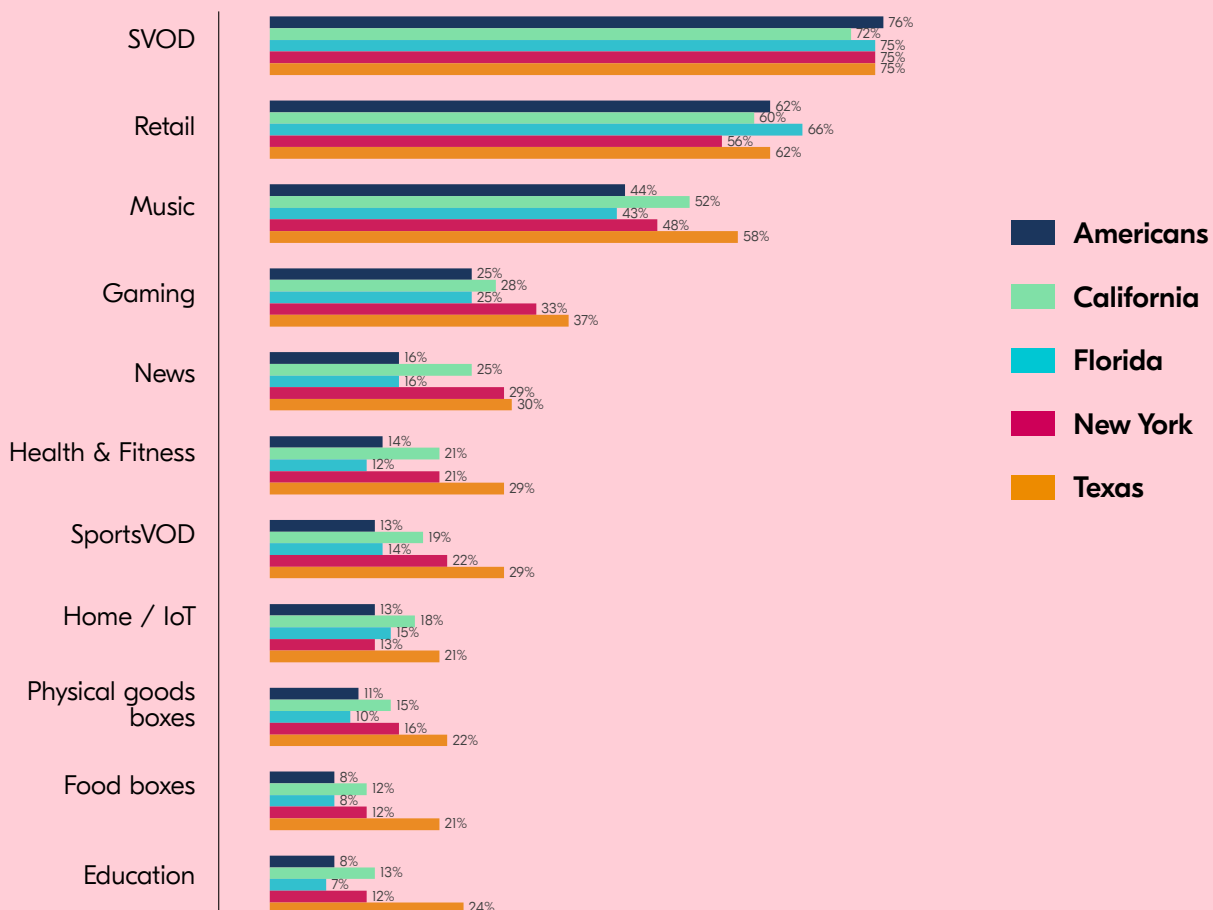
Although news was a lower priority category for most states, with just 16% of all American subscribers signing up to a service such as the NY Times or the Washington Post, in New York this figure rises to 29%. And over a fifth (22%) of

subscribers in the Big Apple sign up to at least one SportsVOD service such as NFL+, NBA+ or DAZN — more than double the US average of 13%.

However, across all of the states, one category looms large in terms of subscriptions: TV and film streaming, or streaming video on demand (SVOD).

Subscriptions to services such as Netflix dominates across the USA, with three quarters (76%) of all American subscribers owning one. This figure remains virtually the same across individual states, with 75% in Texas, Florida and New York and 72% in California.

Subscriptions by state and type



Addressing subscription fatigue

There are certain pressures causing subscribers to cancel subscriptions across all states, ranging from financial to the introduction of ads.

Respondents in Texas and New York were the most likely to cancel subscriptions due to price hikes (66% and 59%), compared to just over half of those in California (53%) and Florida (51%).

Almost half (48%) of Texans also said they had canceled subscriptions due to ads being introduced, compared to 27% in Florida and 31% of all Americans.

And there is also a sense that subscription fatigue is setting in for many people.

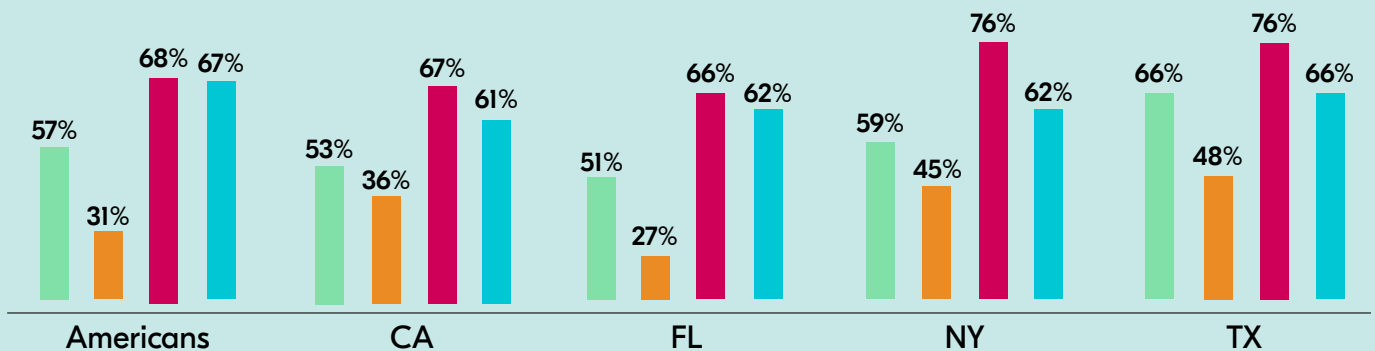
More than two-thirds (68%) of all Americans said they felt there were too many subscriptions now, with this figure rising to over three-quarters (76%) in both New York and Texas.

Yet despite these reservations, the desire for more services is still there.

The majority of respondents across most states said that they can't afford to subscribe to all the deals they'd like to, including 66% of Texans and 62% of New Yorkers.

Subscription and spending trends

- Canceled a subscription due to a price hike
- Canceled a subscription due to ads being introduced
- There are too many subscriptions
- Can't afford all the subscriptions they'd like



Management issues

The data shows that in the states where subscription spending is high, such as Texas and New York, there is also a great deal of frustration and confusion about how to manage them.

In fact, (50%) of Texas residents surveyed and two-fifths of those in New York (41%) stated they don't actually know how much they spend on subscriptions. This is much higher than in Florida, where under a third (29%) said the same.

The data shows a clear correlation between the appetite for spending big sums on subscriptions and a clear desire to manage

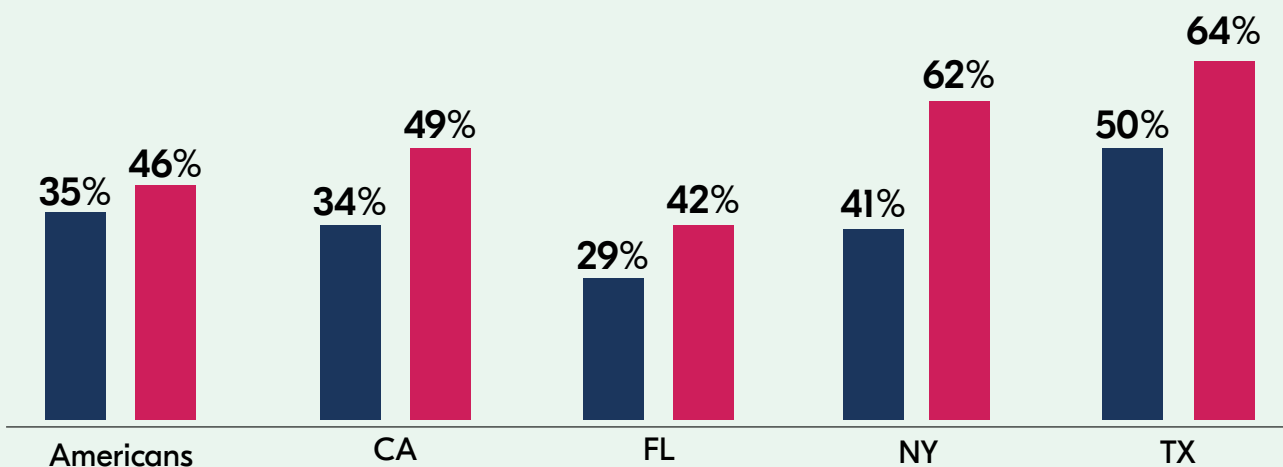
these subscriptions in a way that prevents the user from feeling overwhelmed.

And it's not all talk - it seems people are willing to put their money where their mouths are.

Almost two-thirds (62%) of New York-based subscribers say they would leave their current service provider for another if such a central management option was available, a fifth higher than the 46% national average.

From confusion to solution

- Don't know how much they spend on subscriptions every month
- Would leave their current provider if a central hub were made available elsewhere

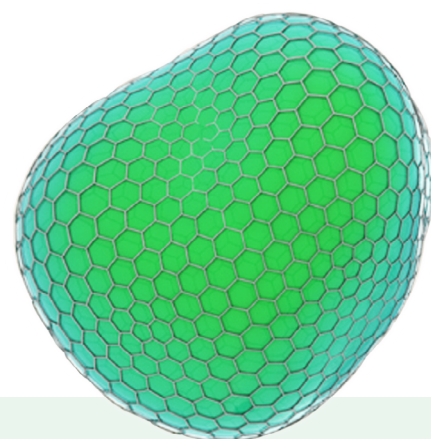


Stating the case for Super Bundling

In New York, over half (51%) of subscribers say they are annoyed they can't manage all their subscriptions in one place, with 58% of those in Texas agreeing.

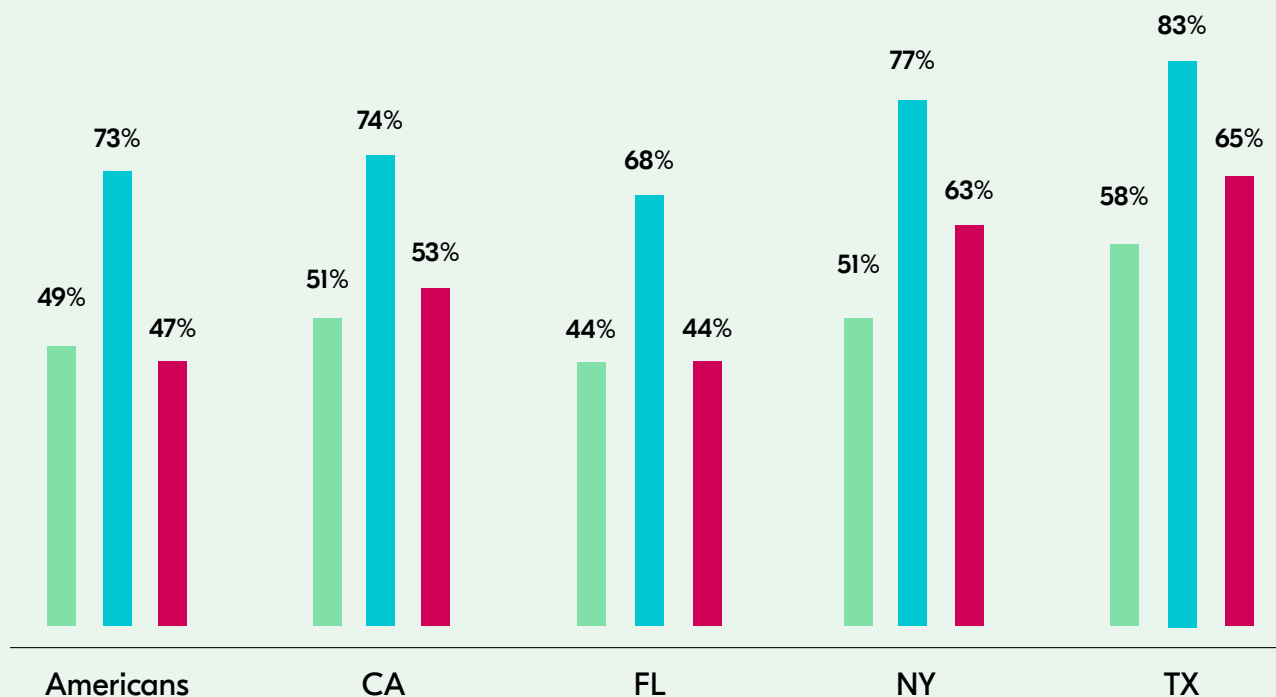
Eight in ten (83%) of Texans and over three quarters (77%) of New Yorkers said they are in favour of one app to manage all of their subscriptions.

A further 65% in Texas and 63% in New York said they would sign up for more subscriptions if such a hub existed — a figure far higher than for all subscribers across the USA (47%).



Attitudes to managing subscriptions centrally

- Annoyed they can't manage all their subscriptions in one place
- Would like all their subscriptions managed in one central hub
- Would sign up for more subscriptions if a single hub were available







Who should own Super Bundling

When it comes to how this all works, subscribers are most willing to put their trust in telco providers to offer this service.

Half of all Americans (50%) say they'd like to see a central subscriptions hub offered by a mobile phone provider, with this figure rising to 61% in New York and 71% in Texas.

TV and broadband providers follow (29% and 26% of all Americans respectively), while other options such as employers and utility providers rank much lower.

Choice of provider to offer single subscriptions hub

	Americans	California	Florida	New York	Texas
 Mobile operators	50%	55%	50%	61%	71%
 TV/cable providers	29%	28%	30%	32%	36%
 Payment companies	26%	30%	25%	34%	35%
 Broadband providers	26%	28%	28%	29%	34%

Super Bundling - The future is here

What unites all of these states is a growing appetite for consistency, flexibility, and simplicity, which can all be found within the Super Bundling solution.

Providing a central hub to simplify the control and management of subscriptions in a world where our desire to have services outweighs our ability to deal with the admin presents a win-win scenario for subscribers and businesses alike.

It drives new revenue for content providers allowing subscription services to share users rather than fighting over them.

What's abundantly clear is that Super Bundling isn't just the future - it's already here.

For more findings on Super Bundling, subscription habits, and expert insights, you can download the full report from Bango here:

[Subscription Wars: Super Bundling Awakens](#)



