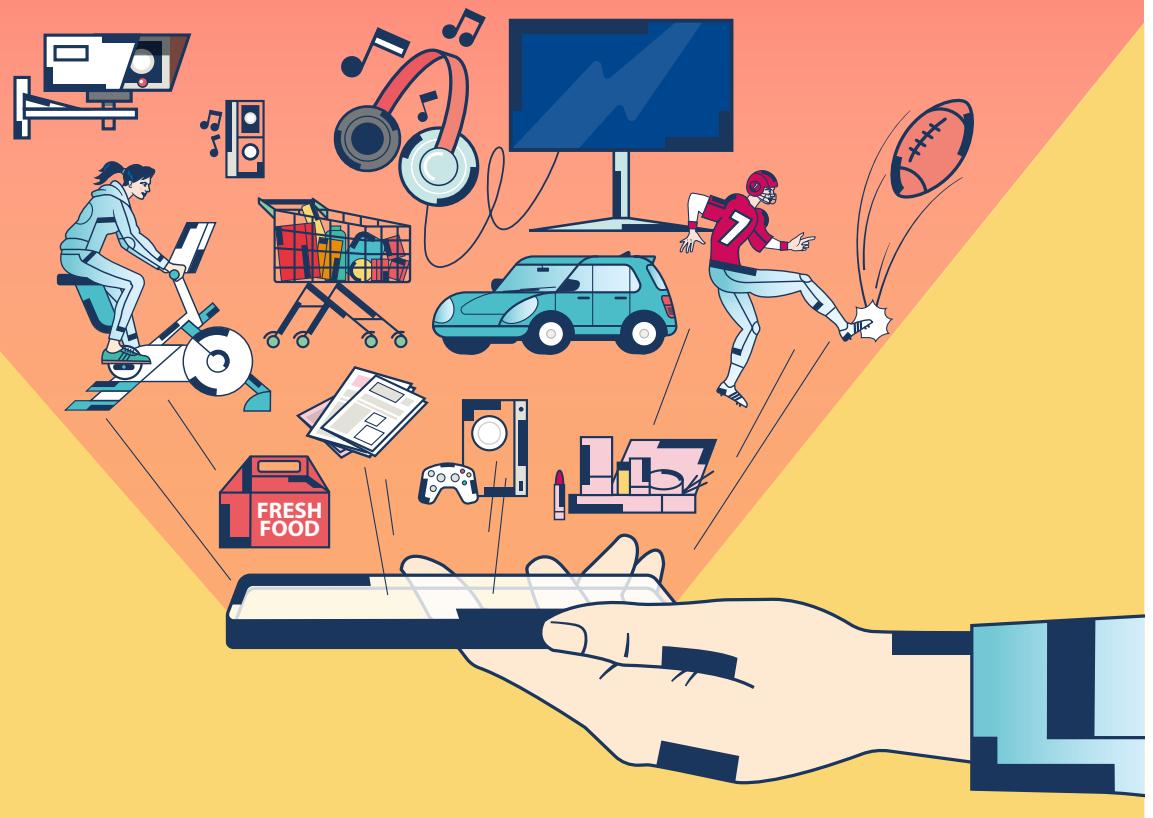


# Bundling: the next wave of subscriptions

**From AI to social media - unlocking growth in the next generation of subscription bundles**



# Beyond streaming

## *Welcome to the next wave of subscriptions.*

Subscription video on-demand (SVOD) may have dominated headlines in the subscription economy, but it's no longer the whole story.

While music streaming and retail subscriptions climb high in 2nd and 3rd place, millions of people now also subscribe to fitness trackers, budgeting apps, premium social media accounts and - most recently - AI assistants. Wallets are open, the race is on, and every new category is angling to become the must-have service in its lane.

But the real opportunity lies ahead. While services like Netflix and Spotify are fighting to retain market share, many other categories are just getting started.

These “younger” subscriptions are seeing rising demand, but still have **huge open ground to capture**. The appetite is there. What’s missing is access.

That’s why after years of tracking subscriber habits across the world and digging into the ‘Streaming Wars’, Bango are shining a light on the new, unsung heroes of the subscriptions world: the next wave.

## Data Methodology

This report includes data from 5,000 US subscribers, exploring their attitudes, behaviors, and the changing nature of the subscription economy.

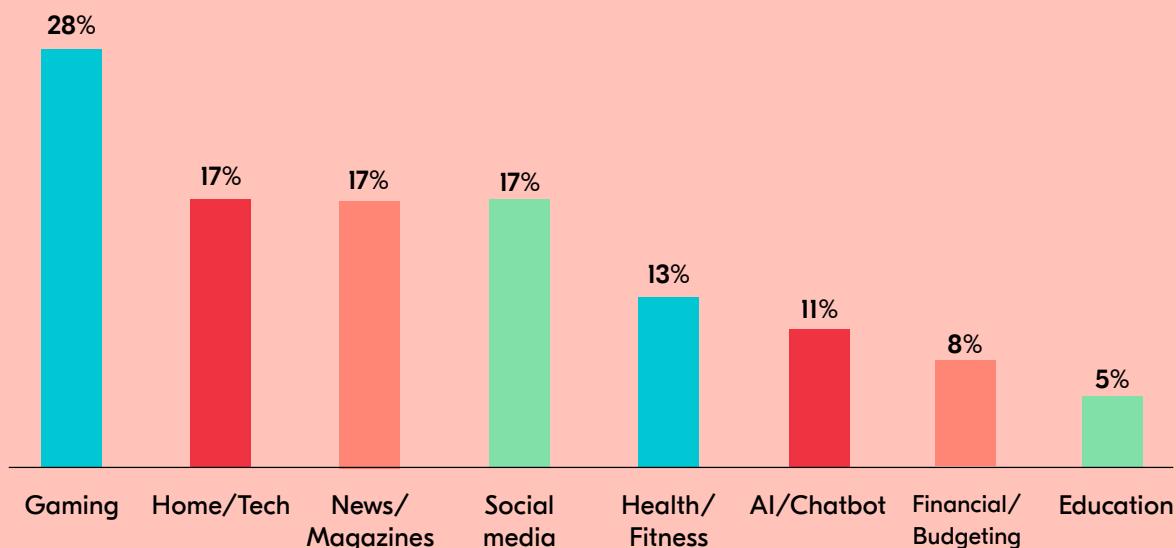
Commissioned by Bango and conducted by independent research agency 3Gem, the **Subscriptions Assemble: Welcome to the bundle economy** research was conducted in Jan ‘25 – launched in March ‘25.

# The next wave of subscriptions

The most popular subscriptions are still subscription video on-demand (SVOD), retail, and music. Three quarters of US subscribers have at least one SVOD sub, while **62%** pay for a retail sub and **43%** pay for music. But there's a long list of other subscriptions, and subscribers, to consider.

These are your future customers.

Subscriptions that go beyond streaming are at the perfect growth stage: familiar enough to be trusted, untapped enough to scale fast. In this short guide, we'll show how bundling can unlock new audiences for your subscription products, and supercharge customer acquisition.



## 'Untapped markets'



**47%**  
of self-described gamers  
don't yet have a gaming  
subscription



**Only 25%**  
of self-described wellness  
enthusiasts currently pay for a  
health or wellness subscription



**Only 15%**  
of self-described investors  
currently pay for financial or  
budgeting subscription



**Only 30%**  
of self-described sports fans pay  
for a SportsSVOD subscription

# Subscribers for life

In a market built on monthly billing and a constant fight to retain customers, loyalty can feel like a thing of the past. Many users jump in and out of subscriptions as their needs change, their interests shift, or a better deal comes along. Flexibility is part of the appeal.

But not everyone moves on.

Around **70%** of US subscribers say they have at least one “Forever Subscription” - a service they don’t ever plan to cancel. That kind of loyalty doesn’t just happen. It’s earned. And while many of these subscribers are locked into their favorite streaming platforms, there’s growing evidence that services outside entertainment could win that status too.

It’s about building a relationship that sticks, rather than chasing short-term sign-ups.

The question for newer categories is simple: **How do you become the subscription they’ll never let go of?**

The answer starts with being where your future subscriber already is, and then making it easy for them to stay. When your product is bundled with other trusted services, you gain reach, relevance and build loyalty.

## Building your *Forever Subscriber* base

To earn “Forever Subscription” status, providers must show up where customers already pay and make it effortless to stay, whether that means plugging into a content hub or bundling complementary partners straight into their own app.

Both routes solve the same pain point: subscribers crave simplicity (**63%** want a single place to manage all their subscriptions), and actively expect brands to collaborate (**71%** urge providers to “combine forces”). Meet them in the channel they trust, remove billing friction, and your service graduates from nice-to-have to non-negotiable.



**70%**  
of US subscribers have a  
“Forever Subscription”

# Flexibility, control, convenience

Rigidly defined categories are a thing of the past. American subscribers build stacks of subscription services to suit their personal wants and needs, picking and mixing as they see fit.

Almost half of social-media subscribers (44%) also pay for a gaming subscription such as Xbox Game Pass, while a quarter of smart-home users add a premium social feed to the same household budget.

Even in the classroom, subscriptions cross-pollinate: 28% of learners who shell out for an education platform also invest in an AI assistant such as ChatGPT Pro.

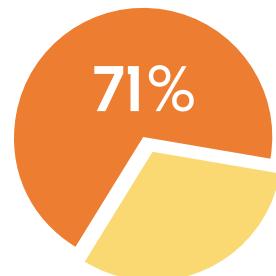
The catch? Those stacks are getting messy. Almost three-quarters (71%) of US subscribers say that their subscription providers should “work together more and combine forces,” and nearly two-thirds (62%) would rather buy a bundle of subscriptions than hunt each subscription down one-by-one.

**Convenience now trumps exclusivity.**

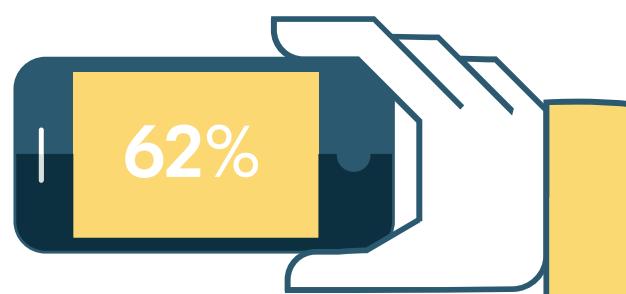
That’s why the smart money is on collaboration and bundling with the apps subscribers already love. Pair a news subscription with a fitness tracker, or tuck a budgeting tool inside a retail membership, and suddenly each service can amplify the other.

Subscribers want flexible, convenient bundles. When asked, 83% of smart-home users, 81% of fitness fans and 80% of students say they’d prefer pick-and-mix packages over rigid, pre-built deals.

By showing up together on the same bill or inside the same content hub, you can provide that flexibility, cutting friction and supercharging stickiness.



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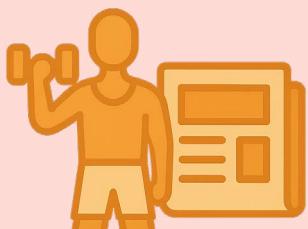
# Combine and conquer

Ask someone how and where they get all of their subscriptions and you'll rarely get a simple answer. News junkies pair meditation apps with finance apps. Gamers combine paid social media with premium AI.

No two subscribers are the same and there are no set rules for subscriptions.

The upshot for subscription providers is that your next wave of growth may come from a bundle with a category you've never considered. The latest data from Bango shows that subscribers are already building mash-ups nobody saw coming, and they're ready to lock in the brands that get creative first.

## The hidden power couples\*



### Active and informed

**24%** of wellness lovers subscribe to newspapers and magazines, the highest of any group and 9 points above average. For subscription brands, this could be a natural tie-in, combining editorial fitness advice with wellness apps or workout plans.

### Stylish sports fans

**26%** of fashion fans also stream live sports via a paid SVOD service. It's a natural crossover, opening the door to bundles that combine streaming access with exclusive merch or limited-edition kit drops.

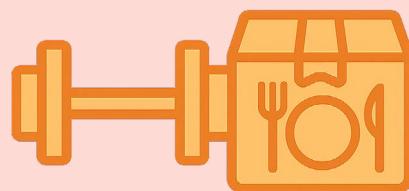


### Binge-watching bookworms

**81%** of book fans also subscribe to at least one video streaming service - the same rate as self-proclaimed movie fans. Rather than being in competition, book and video subscriptions could be a perfect partnership.

### Healthy snackers?

Fitness subscribers are hungry for convenience with one in three (**34%**) paying for food boxes. Health, meal kits and fitness tracking subscriptions could form a virtuous circle of habit.



\*data from self-declared interest groups



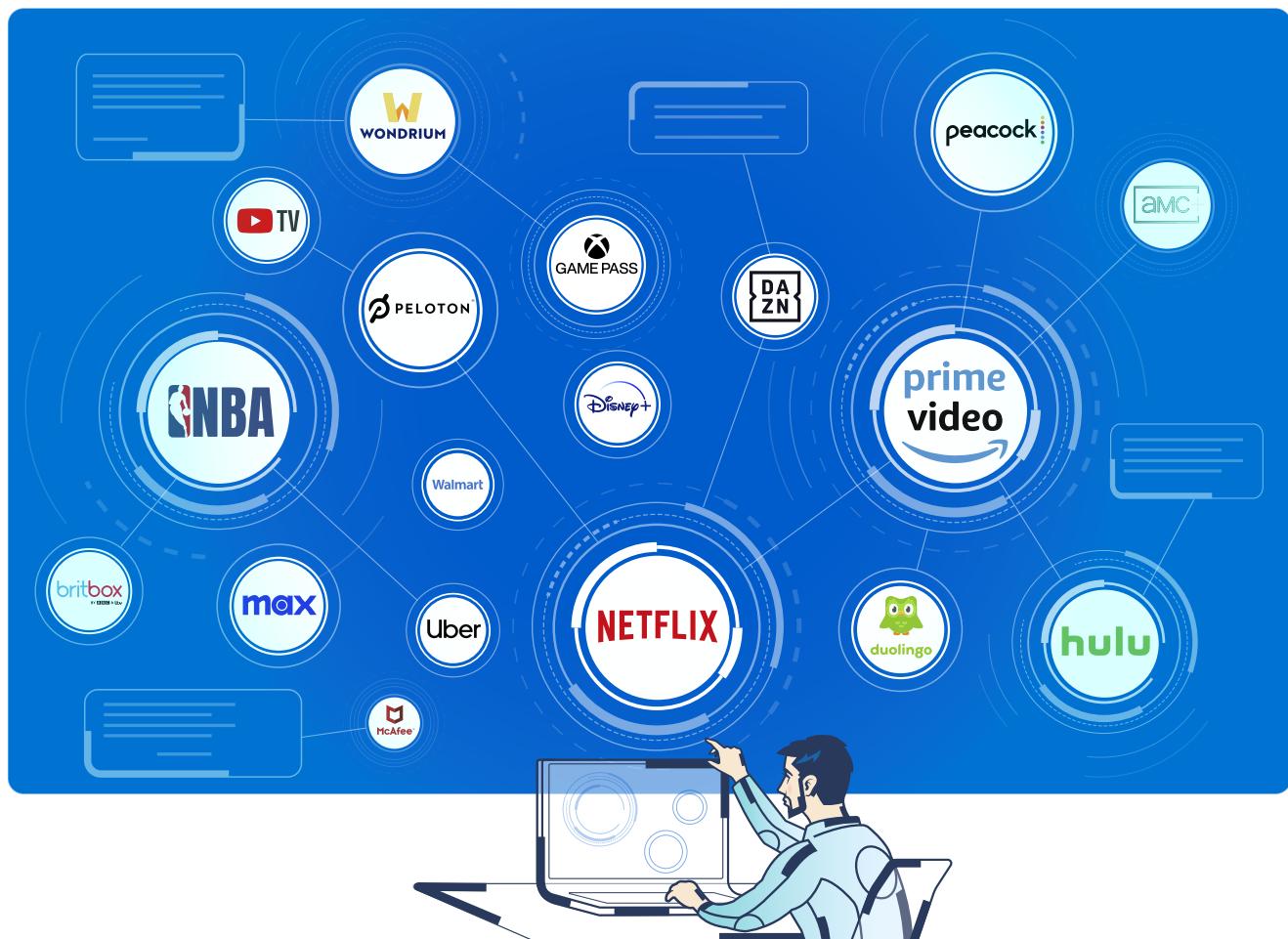
## Social gaming

Gamers are high adopters of both paid social platforms at a rate of **24%** and AI assistants at **18%**. It suggests a clear opportunity to bundle gaming, social features, and smart tools into one connected experience.

\*data from self-declared interest groups

## Freedom beats presets

This is your invitation to think past the obvious “streaming-plus-music” template. Instead, consider building, or being a part of, fresh pairings that mirror real-life behavior.



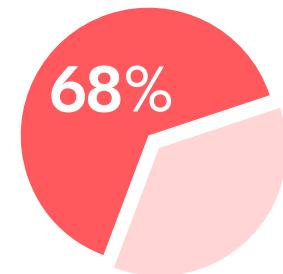
# Bundling, your way

## *When subscription providers become the bundlers*

Flexible bundling offers such as Verizon myHome and myPlan, MyTelenet and Optus SubHub, have often been the fast lane to scale in the subscription economy. These bundling strategies have helped **68%** of US subscribers pick up at least one indirect subscription, and have powered a global wave of Super Bundling that **73%** of subscribers say they want for managing all of their subscriptions in one place.

In 2025, a new trend is taking shape. Instead of only being bundled within content hubs, subscription providers themselves are now taking the lead in a fast-moving Bundle Economy. The bundled are becoming the bundlers.

SiriusXM's decision to bundle Fox Nation video into premium audio tiers is an early signal: an example of one subscription bundling another to expand the reach of both parties and maximize value for their subscribers.



**of US subscribers pick up at least one indirect subscription**

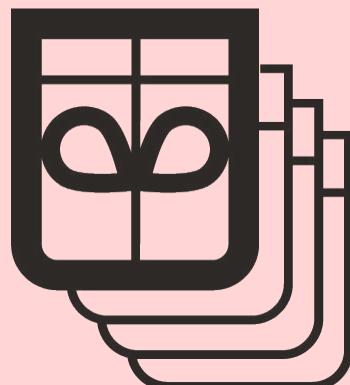


On May 6, 2025 SiriusXM and FOX Nation announced a new bundle of their streaming services

## Why subscribers care

Flexibility now beats brand loyalty.

Remember: Nearly two-thirds of US subscribers (**62%**) prefer to buy a bundle over chasing individual apps, and **71%** believe providers "should work together more and combine forces"



# How to build a provider-led bundle

## Start with...

A single, complementary partner whose audience overlaps yours.

Think fitness + food boxes, or language-learning + travel perks.

Pilot the offer to learn what drives engagement before expanding the roster.

## Next...

**Charge only for the extra value:** bolt the add-on onto an existing tier and ask for a small, transparent top-up. Think '10% off when you add a third service', so subscribers instantly see the upside without feeling they're paying for the whole bundle from scratch.

## Finally...

**Plug into the hubs, don't bypass them.** Leverage the one-to-many benefits from the Digital Vending Machine® from Bango enabling subscription products to integrate once and surface your bundle wherever subscribers are already shopping. That keeps distribution broad while letting you retain the direct relationship (and data) inside your product.

Well-designed provider bundles don't compete with content hubs; they enrich them, turning former rivals into co-creators and giving subscribers exactly the mix-and-match ownership they're asking for. Nail the formula now and, on the next page, we'll show how to super-charge this process in the world's largest bundling ecosystem.



# Join the world's largest bundling ecosystem

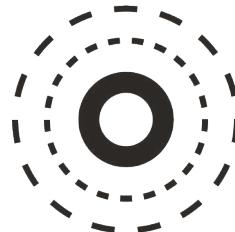
## Go beyond streaming bundles

Traditional bundling has focused on SVOD and music, but today's subscribers want more. Joining the Digital Vending Machine® (DVM™) from Bango helps build your own bundles or get your service into any bundle your audience wants - combining AI tools, finance apps, social platforms, productivity services - into fully customizable packages.



## Reach new audiences, instantly

Break out of the direct to consumer niche. Tap into massive new distribution channels via platforms like Verizon myHome/myPlan, Optus SubHub, MyTelenet and hundreds more. All looking to offer rich, flexible bundles beyond the usual suspects.



## Become a 'Forever Subscription'

Let customers combine your service with others they already love. When subscriptions work together, users stick around longer - building your brand into a mix of essential services they use every single day.



## Track performance, optimize ROI

With built-in analytics, the DVM shows you which bundle combinations are performing best, so you can see what drives growth, retention and revenue. Double down on what works and pivot quickly when it doesn't.



## Why act now?

In the bundle economy, growth depends on more than selling subscriptions. It's about how you bundle them. Whether you team up with individual subscriptions or feature in a content hub, the prize is the same: higher ARPU, lower churn and a customer who sticks for life. Now's the moment to decide which bundles your brand will build and join.

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