



CASE STUDY

Subscription bundling. The telcos' next big thing?

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Consumers want to aggregate all their subscriptions in 'Super Bundling' hubs. The Digital Vending Machine® (DVM™) from Bango lets telcos build them. In this report, we explain the concept – and find out why major content provider TelevisaUnivision signed up.

We live in a subscriptions world. According to Bango, the typical American household currently spends \$900 per year on subscription services. This is a pattern that is being repeated across all regions. For example, the average consumer in Latin America now spends \$37 a month on 3.5 subscriptions.

It's not surprising that consumers are spending more on subscriptions. There are so many products to choose from. The market has fragmented. For example, companies such as Disney and Paramount, which used to bundle their content with Netflix, now have their own offerings.

Meanwhile, the subscription model has moved beyond screen entertainment into diverse new areas. Today's consumers might have a subscription to ride a connected exercise bike (Peloton) or help them sleep (Calm), to use office software (Microsoft) or fund their favorite creator (Patreon).





The \$1.2 trillion subscriptions economy

There are good incentives for businesses to embrace the subscription business model. It offers the potential for predictable revenue, enhanced customer loyalty and data-driven insights.

According to one market estimate, the global subscriptions market was worth \$722 billion in 2025, and could grow to \$1.2 trillion by 2030.

But it's not all rosy. After the growth, there's been an inevitable hangover: subscription fatigue.

Simply, some consumers feel they have too many subscription accounts to manage. One Bango study found that 68 percent of US, 65 percent of European and 80 percent of LATAM streaming

subscribers feel there are too many services available. Around two-thirds of US shoppers say they can't afford all of the subscriptions they would like.

But the concern is not always to do with fees. Just as likely, consumers also feel anxious about their *lack of control* over their subscriptions. They want more agency – ideally via a single destination where they can pay for and manage all their accounts.

What's the solution? Digital technology company Bango believes it has one. It has developed a product that enables consumers to manage multiple subscriptions in one place. From here, subscribers can view, buy, pause and stop all their accounts. This proposition has become known as 'Super Bundling'.

Of course, Bango is not a consumer-facing business. It can't offer Super Bundling itself. Instead,

it created a software as a service (SaaS) product that enables hundreds of subscription content providers to distribute their content through various retail partners such as telcos.

Telcos in pole position

Why telcos? Well, telcos are perfectly placed to play this consumer-facing role. They offer reach, reduced friction in payments, proven user acquisition models and high levels of consumer trust.

In fact, many carriers already offer subscription bundles. According to market analyst Omdia, 20 percent of subscription video on demand (SVOD) accounts are currently sold through telcos. It predicts this could rise to 25 percent by 2028.

Bango is a longstanding partner of MNOs. The company launched in the early 2000s as an enabler of mobile value-added services. It started with direct carrier billing and payments, but has reinvented itself several times since to adapt to wider changes in the industry. In the process, it has developed deep and lasting relationships with most of the world's carriers.

So Bango harnessed its technical expertise and carrier relationships. It built a special Super Bundling ecosystem tailored for MNOs. Bango describes the concept as a 'Digital Vending Machine (DVM)' – a destination through which telco customers can easily discover, select and pay for their subscriptions all in one place via a single centralized bill.

The search for new users

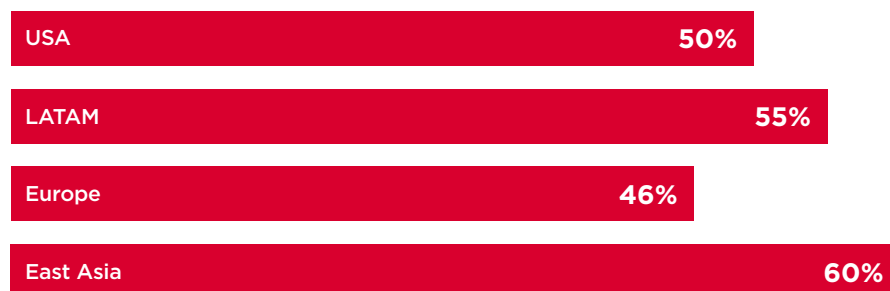
The 'choose new services' part is what makes the concept so interesting to the other participants in the Super Bundling model: content providers.

One of the enduring challenges for companies with subscription-based services is finding new customers – especially as 'organic' subscriber growth slows down. Customer acquisition can be expensive. But it's usually worth the money. According to one report, a streaming TV firm can spend \$88 to acquire a new customer but will be rewarded with \$836 in lifetime value (LTV).

Clearly, working with a partner that already has a vast and loyal customer base can offer a direct route to new subscribers. Collectively, MNOs have more than 5 billion customers.

Some research by Bango backs up this argument. Super Bundling: Inside Secrets report talked to the world's leading subscription providers. They believe telcos are the ideal partners to lead the bundling market thanks to their massive reach and ease of payments. What's more, subscribers feel the same.

% of users that want their mobile operator to offer Super Bundling



Source: Bango survey of 21,400 individuals across 15 countries

Managing the complexity: the four essentials

The above research makes it clear what subscribers want: one destination for multiple services, with a single sign-in, seamless payment and friendly user interface. Sounds straightforward, right? It's not. To enable Super Bundling, stakeholders must wrestle with complexity 'under the hood'.

Challenges include:

Integration

Super Bundling subscription hubs should support a wide range of subscription services. However, these services can be highly differentiated, each with their own methods of payment, contract structure and technical platform. It's a challenge to integrate diverse products into a single hub. To take away the complexity, Bango developed standardized APIs for telcos and content providers to sell through one another, via the Digital Vending Machine.

Support

Super Bundling hubs should do more than let consumers manage their existing subs. They must also provide a destination for *discovery* of new subscription services. That means discounts, offers and promotions. Telcos must bake these features into their platforms making it easier

for their customers to sign up, and thereby increasing ARPU.

User experience

If you're going to offer subscribers a single sign-in for all accounts, you better make it easy to navigate. Otherwise, what's the point? Bad design and technical flaws risk damaging the reputations of both telcos and their subscription partners.

Insight

Data is the lifeblood of subscription services. Providers use data from millions of customer interactions to tweak the content and design of their products. Telcos must make it easy for their partners to collect all the data they need.

The above four components are the 'secret sauce' behind the Digital Vending Machine from Bango for telcos. Today, the product is scaling fast across global carriers in all regions. Meanwhile content providers are rushing to be part of the Digital Vending Machine offering.

Recent additions include Crunchyroll and Disney+ (streaming video), Nord Security (software security), Les Mills (digital fitness), Uber One (ride sharing and deliveries), Perlego (educational eBooks) and more.



Partner story: TelevisaUnivision

One of the Digital Vending Machine's original content partners is the Spanish-language broadcaster TelevisaUnivision. It owns the most watched Spanish programming networks in the US and Mexico.

TelevisaUnivision is home to the premium streaming services ViX, which together offer more than

70,000 hours of high-quality original Spanish-language programming from distinguished producers and renowned talent

TelevisaUnivision joined forces with Bango in 2022 to make its ViX on-demand subscription service part of the Digital Vending Machine offering.

In this exclusive interview, Vanessa Rosas, General Director Global Distribution & Streaming Partnerships at TelevisaUnivision, talks about the partnership and explains the benefits of Super Bundling with telcos.



What is the brief back story of TelevisaUnivision?

We are the world's leading Spanish-language content and media company, with digital and linear streaming offerings as well as radio platforms. Our portfolio includes broadcast networks TelevisaUnivision and UniMás in the US, and Las Estrellas and Canal 5 in Mexico. We have 36 Spanish-language pay-TV channels, including

Galavisión and TUDN, the #1 Spanish-language sports channel in the US and Mexico. With the most attractive Spanish-language sports rights portfolio in the world, TelevisaUnivision has solidified its position as the Home of Soccer.

TelevisaUnivision also owns and operates 59 TV stations in the U.S., four in Mexico with 222 affiliates, as well as Videocine studios and Uforia — the Latin music hub with 40 U.S. radio stations, live events, and a strong digital audio presence.

And what about ViX?

ViX is our video on demand product. It is the first large-scale global streaming service exclusively serving the Spanish-speaking world. It offers free and premium content including original movies, comedies, dramas, telenovelas, and children's programming, along with live news and sports. It was launched July 2021, and accesses content from TelevisaUnivision's library.

What methods did TelevisaUnivision use to drive subscriptions in the past?

We would drive users to app stores or various B2B billing integrations.

Why did TelevisaUnivision choose to work with Bango?

When we launched our first streaming service, Blim, our technical team handled all partner integrations in-house. However, with the development of ViX, we set much more ambitious growth targets. To scale faster, we quickly realized that managing all integrations internally would no longer be sustainable.

That's when we found that Bango Digital Vending Machine offered exactly what we were looking for. Their solution matched our technical and scalability needs, making them the ideal partner to support our next phase. ViX was born through this collaboration, we started together from day one, building the platform as strategic partners

How did TelevisaUnivision become aware of the Digital Vending Machine from Bango offering?

We did a review of the best integrators. We were looking at companies with a proven track record and with both national and international reach. We identified several. But only a few had the

capability to handle multiple integrations simultaneously and scale effectively. Bango stood out as one of the few that met all our expectations.

What is the set up and on-boarding process like for the Bango platform?

It is clear and simple. The Digital Vending Machine from Bango has a high-level design (HLD) document we can use to integrate new resellers. Before, we had to do this ourselves from scratch every time. Now, when we have a new reseller, we just review the HLD for that reseller and activate or deactivate the properties as needed. It is a simple process.





How does Bango's partnership help TelevisaUnivision with data and analytics?

We get regular reports from Bango and it's very useful to be able to combine their analytics and ours. We look carefully at numbers such as active users, churning users, the volume of suspended accounts, LTV, retention value and more. And we can do this for each of the integrations we have with distribution partners.

What is the next phase of your partnership with Bango?

We are still in the expansion phase. With the support of Bango, we successfully launched with 8 B2B partners, some of which have a presence in multiple countries. As a result, we have achieved 13 active connections across Mexico, U.S. and Central America. Now we are working on several more integrations in markets that make sense for our service. Generally, we want to work with more resellers. By working with Bango we can get time to market to around eight weeks, which is very good.

Looking ahead, what new ideas do you want to explore?

We want to keep expanding in Latin America with both postpaid and prepaid users. Digital Vending Machine from Bango is constantly evolving, with new features being added to meet market demands. The latest addition, known as 'Smart Top-Ups', is primarily for the prepaid segment, though its flexibility allows it to be adapted for the other use cases as well. This feature manages the top-up of any offer, by stacking multiple top-ups and controlling the extension of subscription according to the stack. This results in a more flexible, convenient, and seamless experience for all our subscribers.



Bango enables content providers to reach more paying customers through global partnerships. Bango revolutionized the monetization of digital content and services, by opening-up online payments to mobile phone users worldwide. Today, the Digital Vending Machine® is driving the rapid growth of the subscription economy, powering choice and control for subscribers.

The world's largest content providers, including Amazon, Google and Microsoft trust Bango technology to reach subscribers everywhere.

Bango, where people subscribe.

For more information, visit www.bango.com



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