

SUBSCRIPTION WARS: The subscriber strikes back

Southeast Asia & India

Survey of over 6,000 subscribers across
Southeast Asia & India shows appetite for
simpler subscription management



Introduction

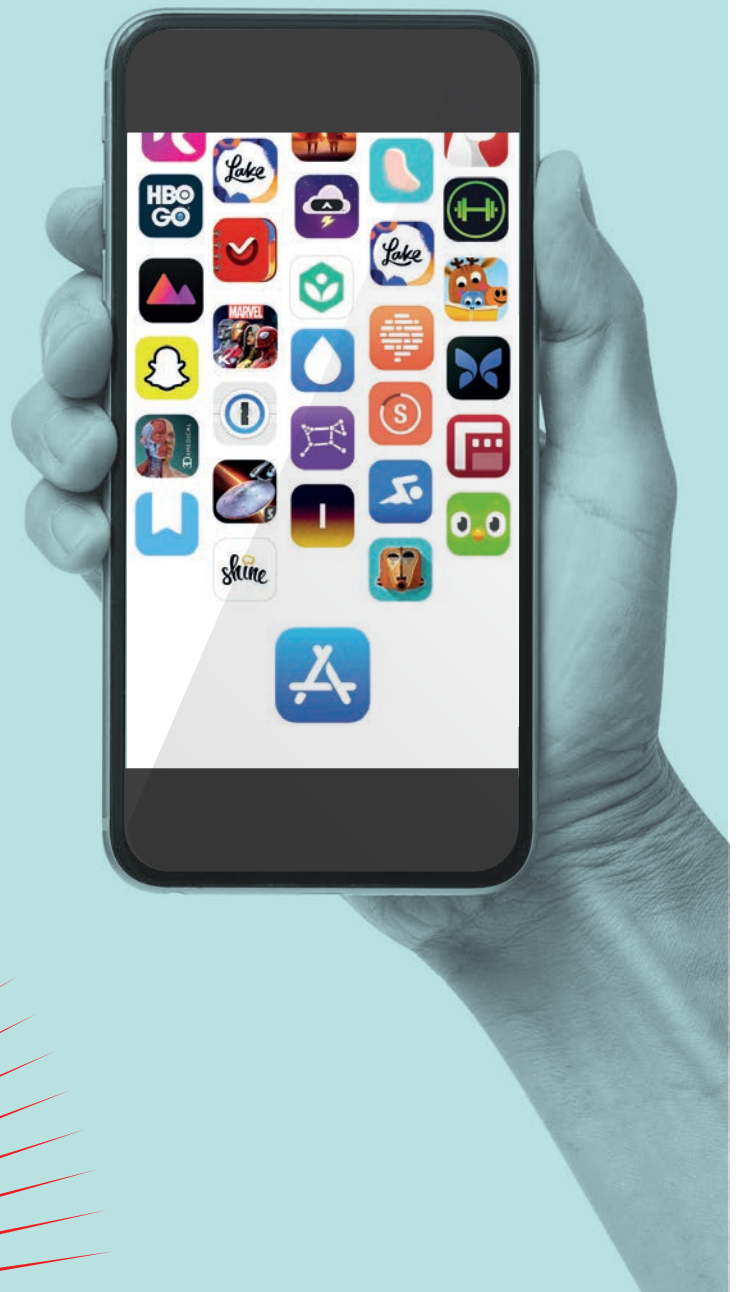
Subscriptions... the story so far in Southeast Asia and India

Since 2018 the subscription economy has leapt from **\$100 billion** to over **\$300 billion** in 2023. And that figure's only set to grow to **\$600 billion** by 2026.

But with growth comes fragmentation. With multiple services now available, many subscribers feel overwhelmed, and the appetite for a single platform to manage all of their subscription services is growing.

Now, as Asian markets play a key role in the global expansion of streaming and subscription services, we wanted to explore how the subscription economy is evolving in Southeast Asia & India. To do this, we've dived into six vibrant markets across the region - **India**, **Indonesia**, **Malaysia**, **Philippines**, **Thailand**, and **Vietnam**.

Through this study, we wanted to understand how subscriber expectations are changing the telecommunications space, and the role that subscriptions can play in a market traditionally dominated by pre-paid mobile.



In this report, you'll discover

- 1 How the subscription economy is evolving in Southeast Asia & India
- 2 The challenges subscribers face when managing and paying for subscriptions
- 3 The future for subscriptions in Southeast Asia and India and why consumers want greater simplicity and flexibility
- 4 The concept of Super Bundling the single platform subscription management solution that is meeting the changing needs of subscribers in this region
- 5 How Bango, the technology leader in Super Bundling, is opening up access to a new subscription ecosystem

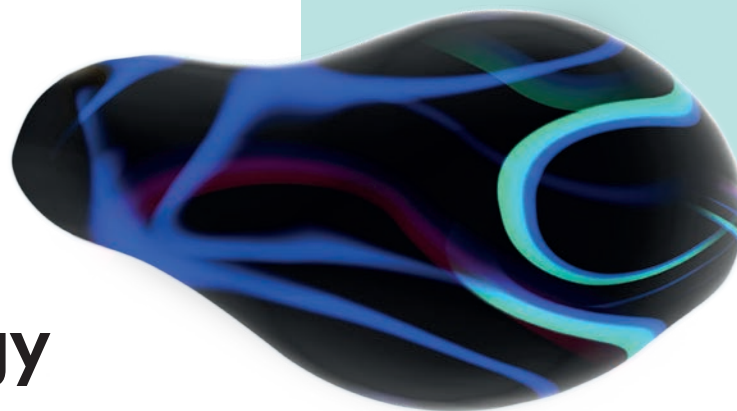
Four key takeaways

Whether on pre or post-paid plans, consumer habits, pain points and requirements remain the same when it comes to subscriptions

Managing subscriptions is overwhelming and frustrating consumers in the region: **81%** say they have too many subscriptions to keep up with

The need for Super Bundling in Southeast Asia & India is undeniable: **93%** of consumers say they'd welcome one platform to manage all of their subscriptions in one place

Subscribers don't want less choice - they want less admin. **89%** of consumers in the region would pay for more subscriptions if they were simpler to manage



Methodology

This report was commissioned by Bango and carried out by independent researchers at MMR based on a quantitative survey of 6,171 consumers across six countries - India, Indonesia, Malaysia, Philippines, Thailand, and Vietnam. The online survey was conducted in August 2023 and

involved an online quantitative survey conducted among males and females (50:50), between the ages of 18-65, across socio-economic classification groups who subscribe to at least one of the following services: Over-the-top (OTT) streaming, Music, Food delivery, Health, Gaming, and others.

Pre- vs post-paid, a shift in subscriptions

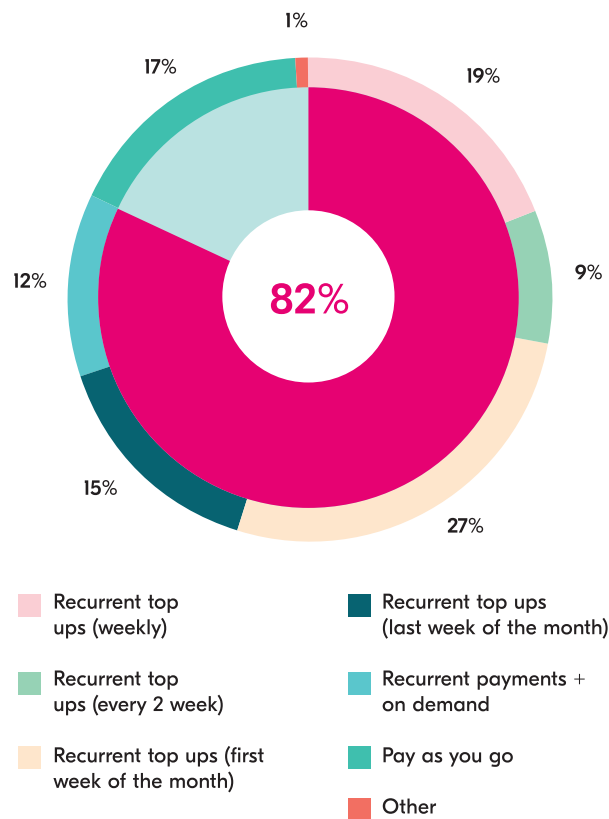
In Southeast Asia & India, pre-paid customers make up the majority of the market (**83%**). These subscribers have traditionally been seen as less predictable, topping up their credit when needed. In contrast, post-paid customers (**17%**) offer a more reliable, and consistent billing cycle.

But these groups might not be as different as we once thought. Yes, of course pre-paid subscribers top up less and pay less overall, than post-paid. But the comparisons shouldn't stop here.

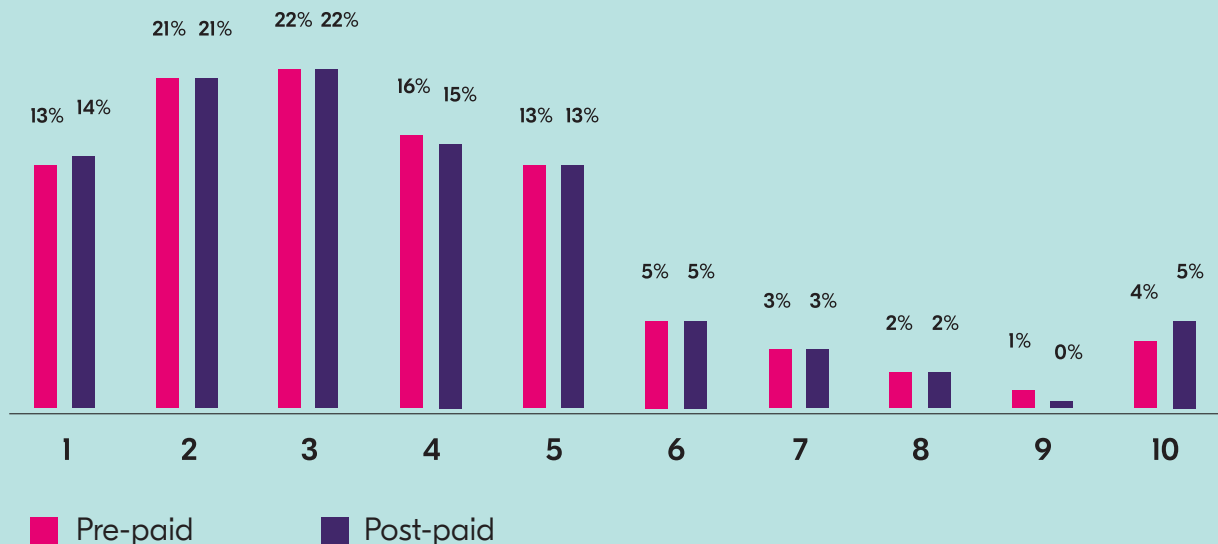
Among pre-paid customers, a massive **82%** pay the same amount every time via a recurring payment. In short, pre-paid is no longer about unpredictable or pay-as-you-go one-off payments. It's a planned, consistent schedule - just like post-paid.

The gap between pre- and post-paid is closing, and this fact is just as clear in the subscriptions market. Both groups pay for a similar number of subscriptions, billed in a similar way, over a similar length of time.

How often do pre-paid mobile consumers top up?



How many subscription-based services do you have access to?



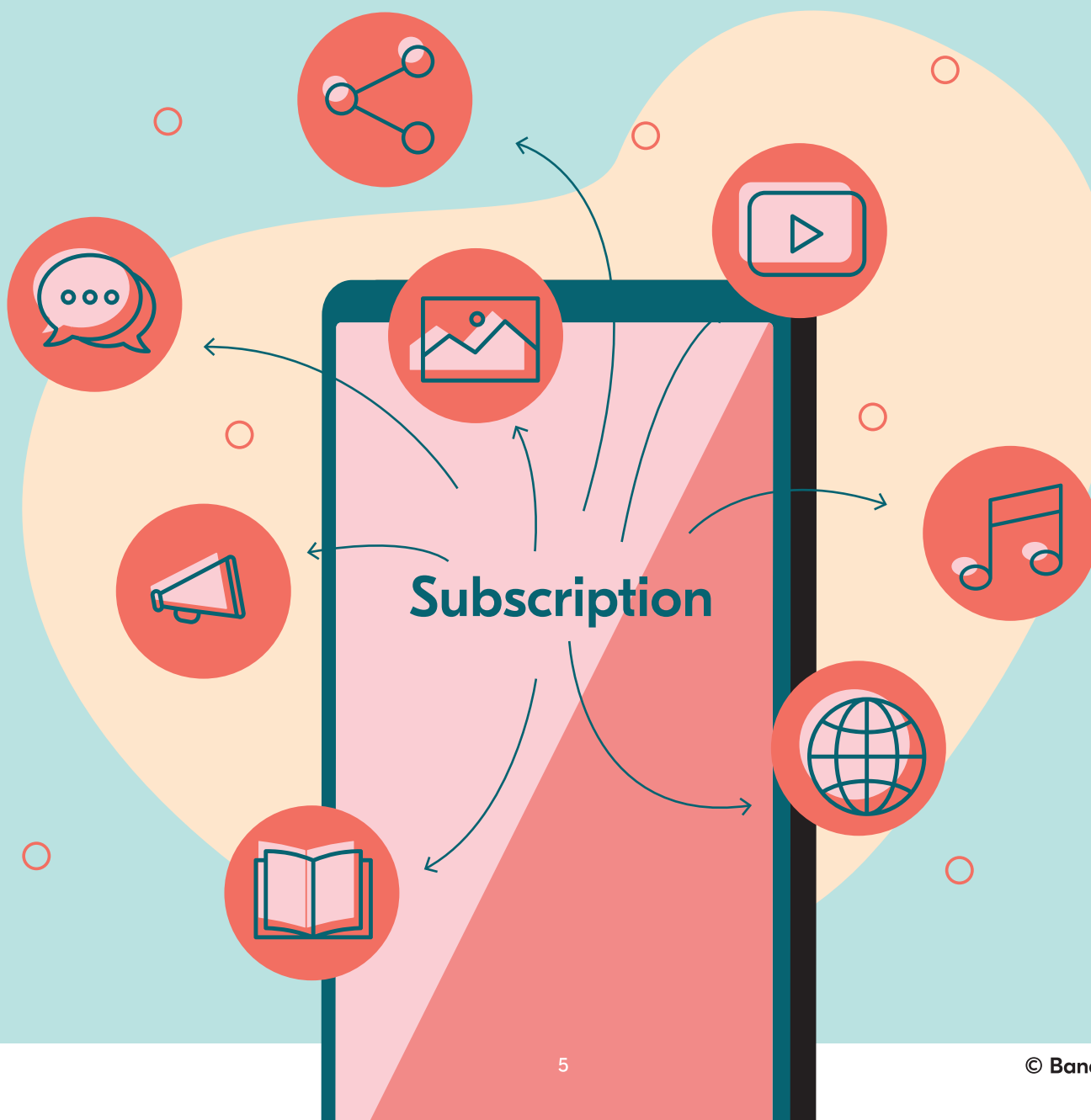
The state of subscriptions and bundles

When we look at the most popular subscriptions in Southeast Asia & India, streaming video, music and food delivery subscriptions lead the charge. For both pre-paid and post-paid subscribers, the data tells a similar story, with the majority of subscribers paying for similar services on a monthly plan.

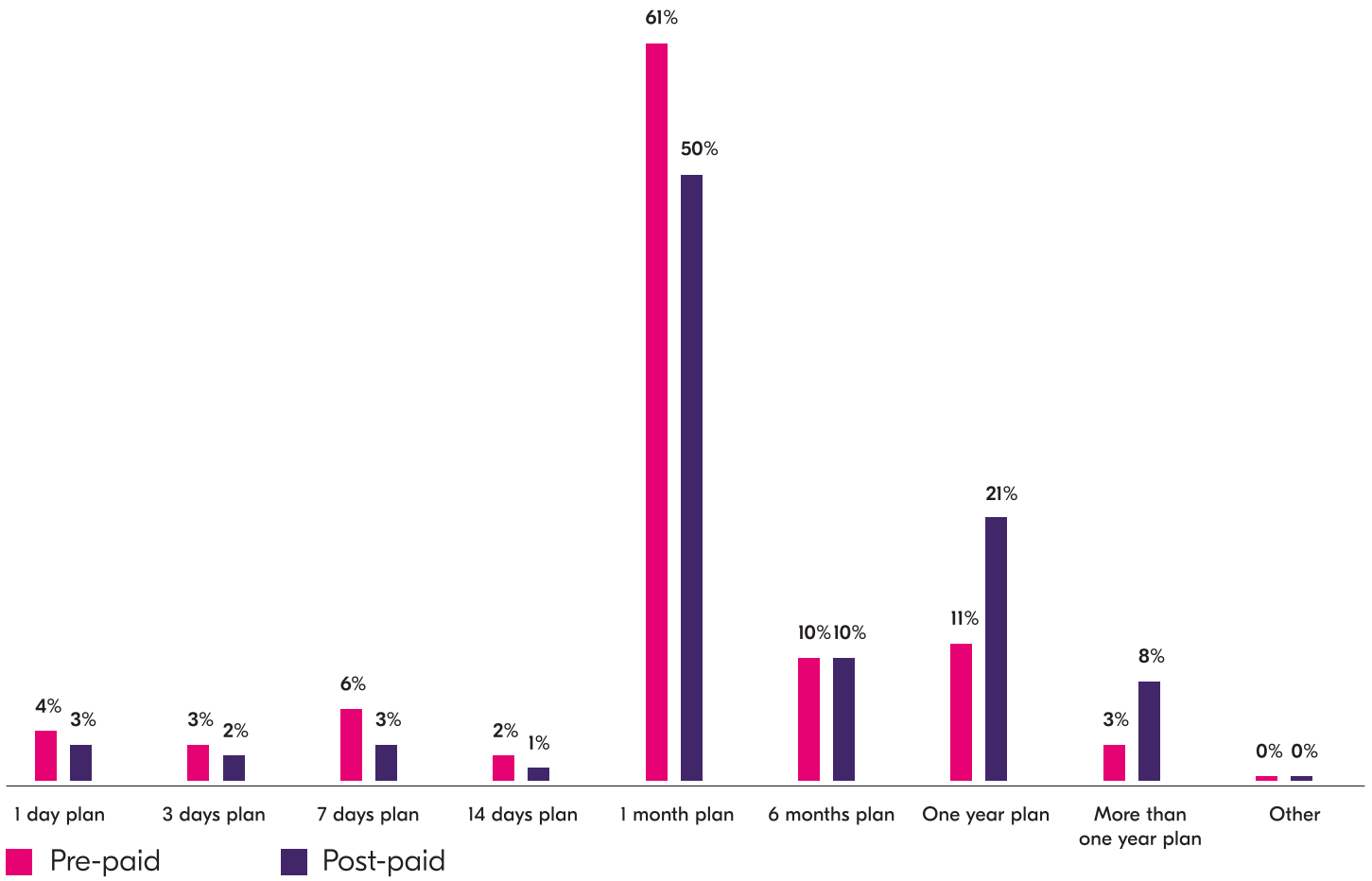
For many of these subscribers, subscription services and mobile providers complement

each other. On average, **76%** pay for subscriptions via their regular phone bill, while **67%** have a phone plan with built-in streaming and subscription services.

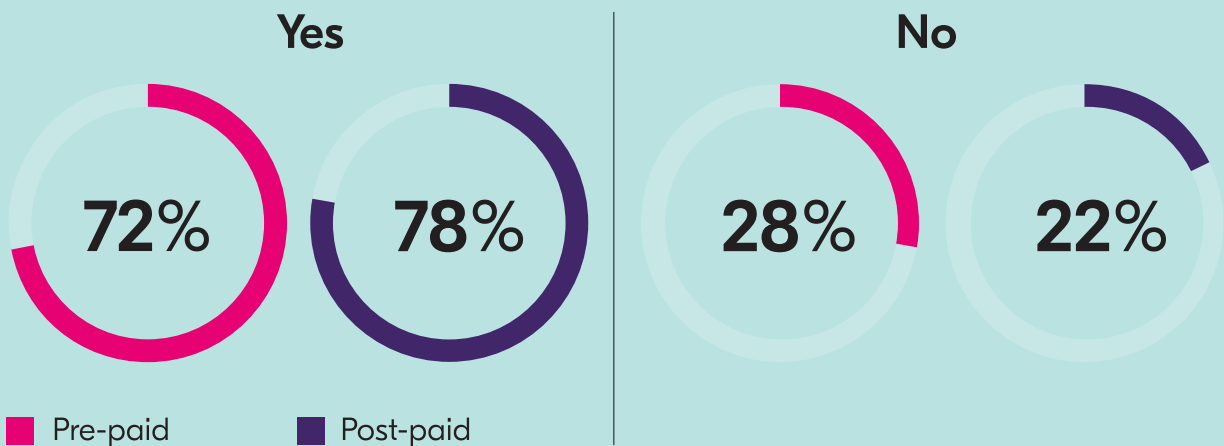
And there is an appetite for more, which is beyond the subscriptions people are given via their initial sign-up plans. Up to a third of subscribers would sign up to extra services, such as food delivery, sport and music subscriptions, if this was an option.



How long do you usually subscribe to subscription services?



How many subscribers use subscriptions provided through their phone contract (pre- vs post-paid)



Which services do people subscribe to via their mobile plans?

	India	Indonesia	Malaysia	Phillipines	Thailand	Vietnam
Television / Film	85%	82%	69%	79%	84%	74%
Sport	42%	22%	23%	17%	40%	49%
Music	71%	67%	55%	51%	55%	51%
Food delivery	47%	59%	60%	39%	45%	41%
Health / Fitness	29%	15%	19%	10%	16%	15%
Gaming	27%	23%	25%	19%	28%	32%
Productivity / Software	22%	13%	21%	15%	18%	23%
News / Magazine	32%	17%	13%	10%	12%	21%
Physical goods Boxes	20%	15%	15%	14%	12%	13%
Other	1%	1%	4%	3%	1%	2%

% of consumers who use their mobile plan to subscribe to subscription services

	India	Indonesia	Malaysia	Phillipines	Thailand	Vietnam
Yes	78%	81%	58%	77%	88%	74%
No	22%	19%	42%	23%	12%	26%

% of consumers who use a subscription service provided as part of their mobile contract

	India	Indonesia	Malaysia	Phillipines	Thailand	Vietnam
Yes	86%	83%	76%	83%	90%	90%
No	14%	17%	24%	17%	10%	10%

A case of subscription overload?

Just as in the US, consumers are overwhelmed by the number of subscriptions available. The ease at which they can sign up to new services - either by free trials or other offers - means keeping tabs on spending can be a headache.

And it's not just TV and movie subscriptions that start to stack up. Whether it's ordering groceries, gaming, or signing up to a health and fitness package, the choice can be overwhelming.

As the data confirms, consumers are either paying for subscriptions they don't use, have signed up to free trials they forgot to cancel or forget they had subscriptions they were paying for but didn't use.

It's a phenomenon known as subscription overload. Not only is it an administrative headache, it can be hard on the pocket as well.

The market is reaching a saturation point, with **81%** consumers saying there are "too many subscription services" now.

Analysis

81% of consumers said that there are too many subscription services now

59% are annoyed they can't manage all their subscriptions in one place

48% of subscribers feel 'locked in' to their current subscription providers

44% feel pirate streaming services are the best way to access all the content in one place

44% of these consumers forgot they had subscriptions they were paying for but didn't use

32% of consumers are paying for subscriptions that they don't use

Subscriber frustrations

59%

annoyed that they can't manage all of their subscriptions in one place

54%

can't remember their billing date of subscriptions

51%

feel frustrated they can't pause or stop their subscriptions whenever they like

48%

feel "locked in" to their current subscription provider

71%

would like to opt out of automatic renewals on their subscriptions

81%

feel there are too many subscription services now

53%

it's hard to know which streaming service has the content they are looking for

44%

of consumers forgot they had subscriptions they were paying for but didn't use

32%

of consumers are paying for subscriptions that they don't use



What's needed is a new approach to managing subscriptions to improve the overall customer experience



The future for subscriptions: Simplicity and flexibility

The data speaks for itself. Consumers want a simpler hassle-free subscription experience. In fact, **93%** want all of their subscriptions managed in a single platform. That's not just for TV and movies. It's everything.

Nine in ten (**91%**) said having all their subscriptions in one place would help them better manage their household expenses. What's more, two thirds (**67%**) don't care which platform they use, as long as they can access the content/service they want.

93% want all of their subscriptions managed in a single platform

93% of pre-paid consumers and **91%** of post-paid consumers — said they wanted all their subscriptions managed in a single platform, further underlining the fact there is no difference between the two customer segments.

In fact, all the pain points mentioned by consumers — from managing subscriptions to greater control over spending — can be addressed by centralizing all their subscriptions into one simple easy-to-use bundling platform.

But these aren't the only issues facing consumers. Dig a little deeper and it's clear that while it would be wrong to describe some issues as 'pain points', they are, nonetheless, definitely irritations.

What consumers want is Super Bundling.

Solving subscriptions with Super Bundling

Super Bundling is a digital revolution driven by consumers that is bringing channel partners - such as telcos, banks and retailers - and content providers together in a single platform.



What do subscribers want from a single subscription management service?

Get discounts when they subscribe to a bundle of services and subscriptions

Access and subscribe to different services - such as games, music and food deliveries - within a single platform

Calculate the best deals and prices across all platforms

See costs saved through deals and promotions

Pay multiple subscriptions via one monthly bill

Take payment holidays

Centrally update payment deals

“

What makes the case for Super Bundling so compelling is that this isn't being done to make lives easier for telcos, TV companies or content providers.

Super Bundling is being adopted because it's exactly what consumers want. Consumers are crying out for a way to make their lives easier - a simple way to add, administer and pay for subscriptions and products all in one place.

And they are telling us that if this is done, they'd switch to the provider of this service, be more loyal to them AND pay for more services. It's a win for everyone, but mostly it's a win for the customer.



Giles Tongue,
VP Marketing, Bango

Introducing Super Bundling - the all-in-one subscriptions hub

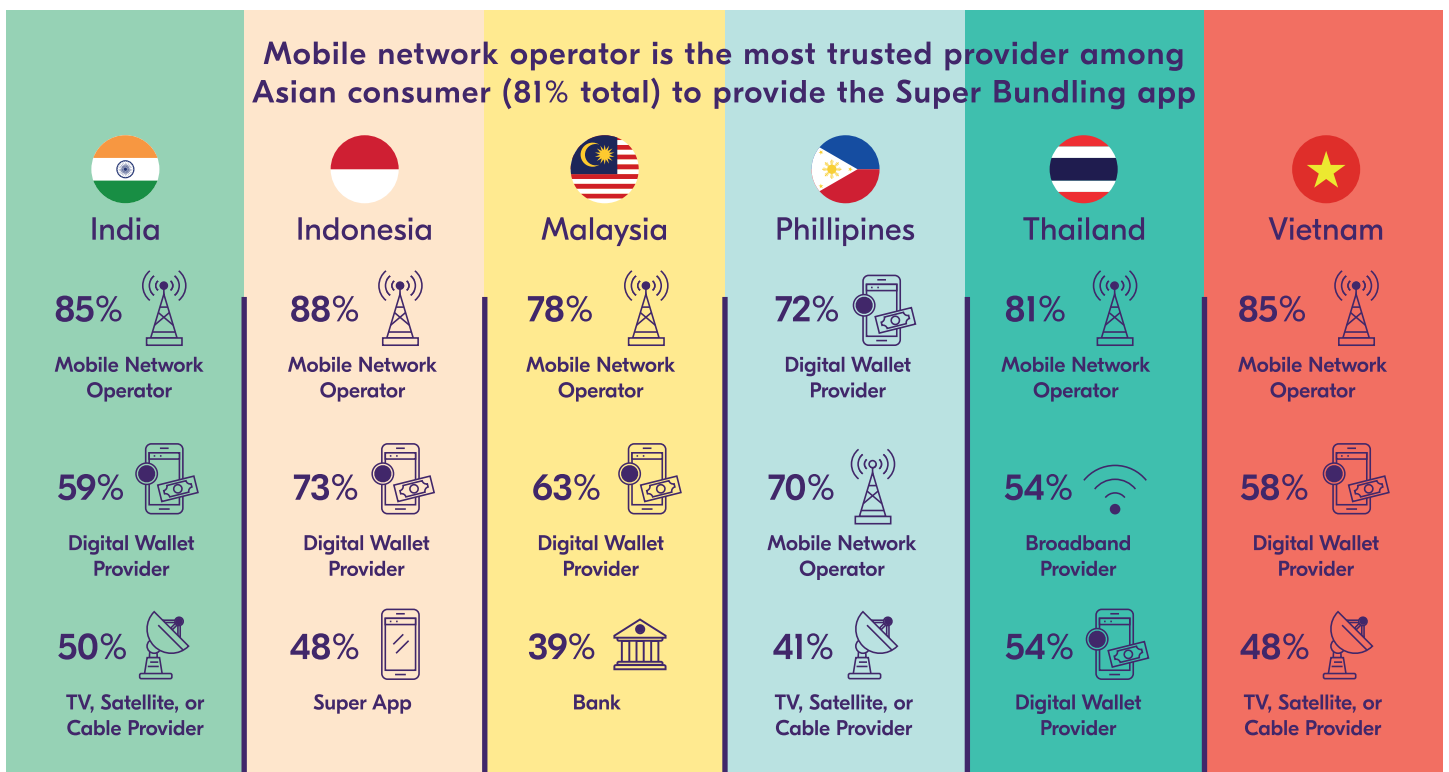
In Australia, subscribers are able to access a Super Bundling service via Optus SubHub. This all-in-one platform brings together services such as Netflix, Amazon Prime, Paramount and Kindle.

In the US, Verizon's +play is offering subscribers a similar level of choice in terms of content, administrative simplicity and flexibility.

In both cases, part of the success of these services is down to the existing trusted billing relationship that customers have with these Super Bundling hub providers.

The data from Southeast Asia & India reveals that mobile operators (81%) are the most trusted brands to provide Super Bundling, followed by digital wallet providers (63%) and TV, satellite and cable providers (39%).

Who is most trusted to offer a single platform for subscriptions?



Super Bundling provides customers with access to a huge range of subscription services — managed and paid for through a single content hub.

Again, this includes a whole range of services, from streaming apps, gaming and ebooks to food

delivery, health, and fitness.

For those who understand the tectonic changes happening in the subscription economy — and the shift to Super Bundling — the rewards are clear.

Super Bundling drives customer acquisition and loyalty

95% would be more loyal to a brand that provided Super Bundling

94% think Super Bundling would help them control their household expenses

92% would use a single Super Bundling platform that had in-built cyber security

90% would subscribe to international content such as Netflix or Disney+ if their network operator will offer easy access

89% of subscribers would spend more time using their subscription services if Super Bundling was available

81% would sign up for more subscription services if it was available

66% would leave their current TV/broadband/mobile provider if Super Bundling was available elsewhere



Consumer dynamics in Southeast Asia & India compared to the US

In November 2022, Bango published a report — Subscription wars: the subscriber strikes back — which took an in-depth look at consumer behavior in the USA. There are some striking similarities — and differences — between the USA and Southeast Asia & India that are well worth pointing out.

Unsurprisingly, streaming TV and films are the most popular subscription services in both the USA (85%) and Southeast Asia & India (81%) with music (both 54%) also making the top three. And while subscribers in the USA would prefer to

play games online, people in Southeast Asia & India are keen to order food (55%).

The key takeaway is the extent to which subscribers in Southeast Asia & India want greater control over their subscriptions. There was good data from the US which is fueling the adoption of Super Bundling in North America.

But the strength of the data from subscribers in Southeast Asia & India points to even greater opportunities for businesses that host content hubs and those that provide subscription services.

	USA	Southeast Asia & India
One single place to manage all their subscriptions	78%	93%
Feel there are too many subscriptions services	72%	81%
Don't care which platform they use as long as they can access the content/services they want	65%	67%
Would spend more money if they had access to a Super Bundling platform	70%	89%
Would sign up to more subscription services if they were managed better	63%	81%
Would be more loyal to brands that offered a single platform	79%	95%
Would leave their current TV/Mobile/Telco provider to one that offers a single subscriptions hub	57%	66%
Don't know how much they're spending on subscriptions	35%	16%

What is Super Bundling?

Super Bundling is the new frontier for brands looking to cement brand loyalty and drive customer acquisition. It's already being adopted in the US, Europe and Australia.

The concept is simple. It revolves around a content hub that brings together dozens of subscription services — all managed and paid for in one place. Typically, this could be hosted by a telco although it's a viable strategy for other partners as well such as broadband and TV providers, banks and digital wallet services.

Traditionally, the bundling of subscriptions by telcos has been done to make the value of the phone package more appealing to customers. However, those that host Super Bundling platforms have the opportunity to sell more products — increasing average revenue per user (ARPU), driving loyalty, acquiring new customers, and repositioning themselves with this expanded offer. In this region, where appetite for managing multiple subscriptions is high, this approach is critical.

After all, organizations like telcos are no strangers to bundling. The concept took off when they started packaging their own services — such as data, call time and SMS — as part of their plans. And as this model became more successful, telcos became more creative, branching out to offer subscriptions in areas such as sports and movies.

Today, the industry is going through the next generation of bundling — Super Bundling. It may look like the bundling of old, but it's on a completely different level. Driven by subscribers, telcos are responding by offering Super Bundling platforms that offer unparalleled choice, ease of use and single billing.

According to a research made by Omdia, **20%** of all online video subscriptions this year will be sold via telco bundling. In Southeast Asia and India, that figure currently stands at 17% rising to **21%** in 2026, while in central and Southern Asia it's set to hit **22%**.

But this is about more than SVOD. Every conceivable subscription-based business or content provider — such as gaming, health and fitness, music, education and physical goods services such as food delivery and beauty products — stands to benefit from making their services available through Super Bundling hubs.



Subscription users don't want less choice, they want less admin.

They're tired of managing multiple services, multiple accounts and paying multiple bills. What's needed is not fewer subscription services, but a new way to bundle all those subscriptions together to make them easier to manage.

We need to focus on creating all-in-one solutions that give users the best prices and provide flexibility over bills. Above all, we need a solution that puts subscribers first.



Anil Malhotra,
Co-founder and Chief
Marketing Officer,
Bango

Bango — spearheading the Super Bundling revolution

Super Bundling is the solution to a problem that is tarnishing consumer experience. And Bango's technology is at the heart of this digital subscription revolution.

Bringing together telcos and content providers in one place, Bango Digital Vending Machine is a SaaS product that enables the Super Bundling of content subscriptions.

Top telcos have already created their own vibrant subscription hubs by capitalizing on the Bango Digital Vending Machine bringing together dozens of providers including Netflix, ESPN, Amazon Prime, Duolingo, YouTube, Peloton, Audible and more in one seamlessly integrated solution.

The Bango Digital Vending Machine isn't

just for established players. The low barrier to entry means it's ideal for content and service providers looking to make a name for themselves. Plus, it opens doors to some of the biggest reseller networks around including telcos, banks and retailers.

Support for a range of commercial models means that the Bango Digital Vending Machine ensures both content hubs and providers get to market at speed and with minimal integration. There are no awkward introductions or multiple, difficult-to-manage commercial relationships. Instead, there's just one. Bango. And we take care of the rest.

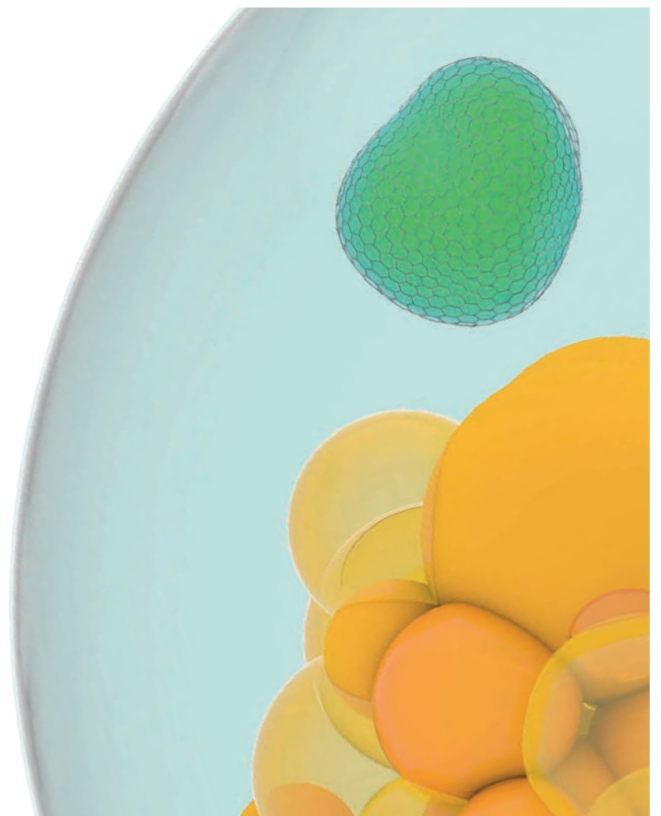
Our pre-built integrations ensure content providers are made available to all the telcos, all the time.

Be part of the Bango Super Bundling revolution

It's not a case of if Super Bundling will happen. Or when. The Super Bundling revolution is happening. Now. And it's being driven by a wider appetite for digital subscription services coupled with a need for subscribers to stay on top of their spending.

Almost one in five (16%) of subscribers in Southeast Asia & India don't know how much they spend each month on subscriptions. While a third (32%) are paying for subscriptions that they don't use. Nearly half (44%) of these subscribers forgot they had subscriptions they were paying for but didn't use.

People are crying out for a way to access, manage — and pay for — all of their subscriptions in one place.



Subscribers are telling us:



93% of those surveyed by Bango said they want all their subscriptions managed via a single service



91% said that centralizing all subscription services in one place would enable subscribers to better manage their household expenses



95% would be more loyal to a brand that provided Super Bundling

The future for the subscription economy lies in Super Bundling.

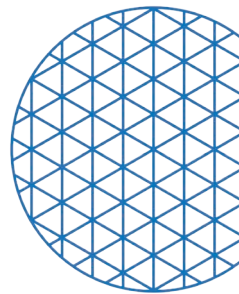
For telcos and other platform providers, Super Bundling has become a key battleground for the retention and acquisition of customers.

For content providers, it's an additional route to market that provides access to millions of potential new customers.

And for subscribers, Super Bundling is the answer to a problem that is souring their enjoyment of their favorite subscriptions and services.

Which is what the Bango Digital Vending Machine is designed to do.

It's time for you to be part of the Super Bundling revolution too.



Want to find out more about Bango Digital Vending Machine and how Super Bundling is set to supercharge the subscription economy?



Contact us at sales@bango.com

About Bango

Bango brings together digital payments and marketing technology to help businesses effectively market, sell, and monetize products to online customers everywhere. The world's leading companies, including Google, Amazon and Microsoft, all work with us to accelerate their growth and scale their businesses.

The Bango Digital Vending Machine is provided as a SaaS product offering essential services for merchants to grow, including one-click online payment and digital distribution through third-party resale partnerships.

These technologies, delivered through a unified platform, enable merchants and their partners to market and monetize content and services to billions of online users everywhere.

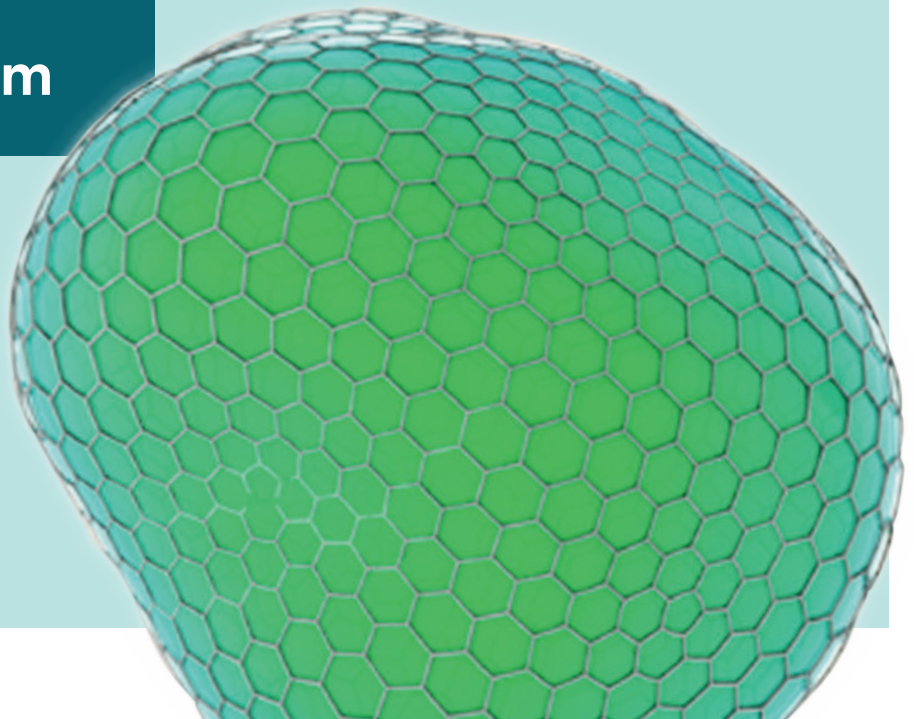
The Bango Digital Vending Machine drives the new wave of "Super Bundling" services, which are increasingly responsible for consumer subscriptions. Resellers, such as telcos, banks, utilities, and retailers, deploy the Bango Digital Vending Machine to attract and engage more customers by bundling third-party subscriptions with their own services.

By leveraging their trusted billing relationships with millions of subscribers, resellers offer a significant benefit to merchants seeking new customers. Merchants, in turn, provide exciting content that helps differentiate the services offered by resellers.

For more information visit
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Appendix:

Deep dive into consumer behavior in India, Indonesia, Malaysia, Philippines, Thailand, and Vietnam.



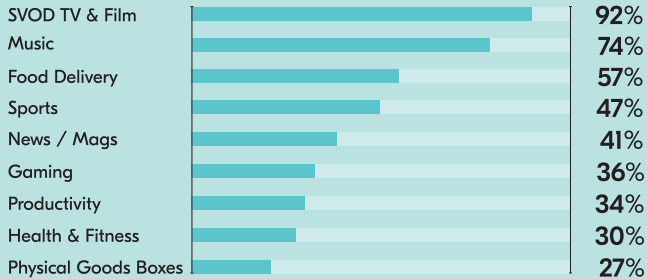


India

Market Overview

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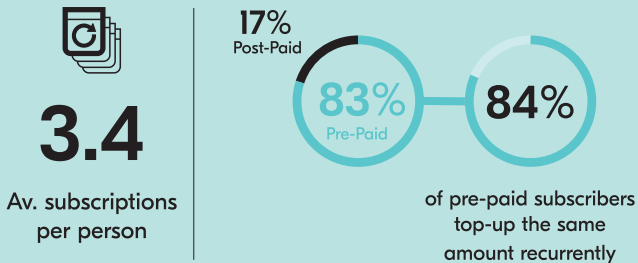
Which subscriptions do consumers subscribe to?



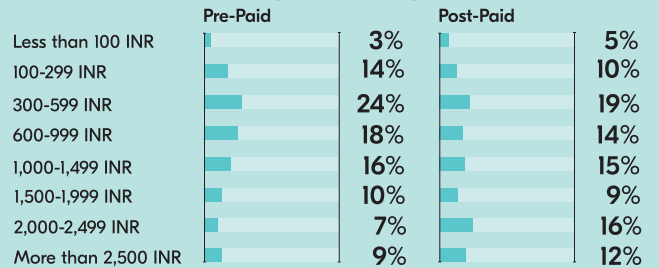
Top 3 most popular subscription durations



Pre-paid users make up the majority of the market



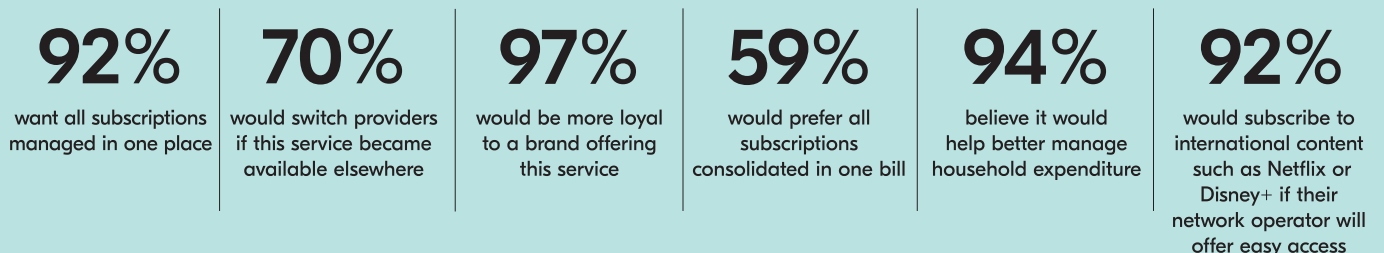
How much do subscribers spend monthly on subscriptions?



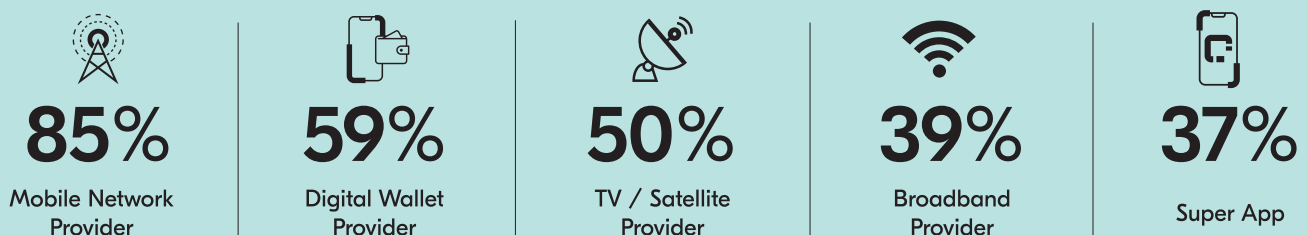
What frustrates subscribers the most



Consumers want one place to buy and manage subscriptions: Super Bundling

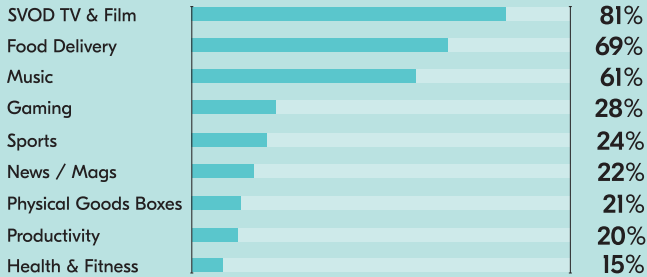


Who would subscribers most trust to provide this service





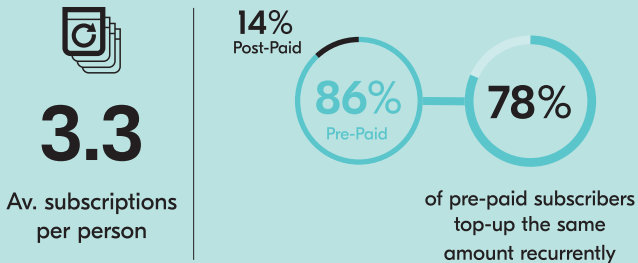
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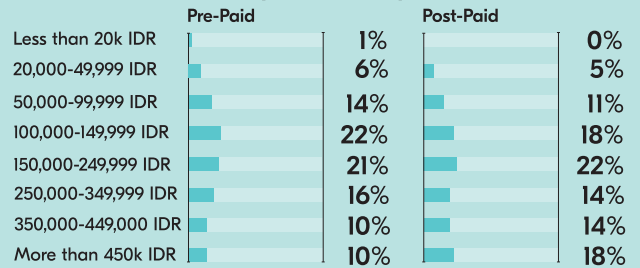
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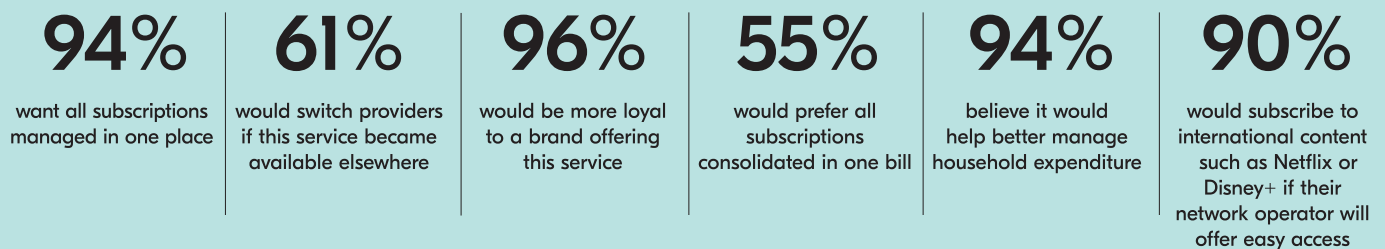
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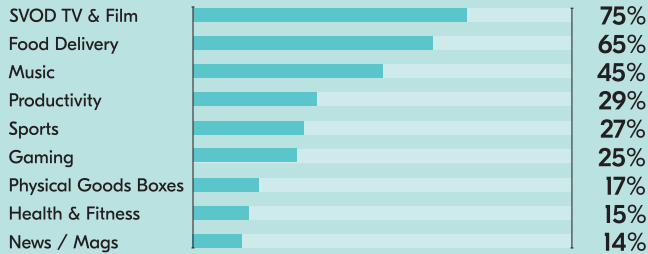


Who would subscribers most trust to provide this service





Which subscriptions do consumers subscribe to?



Top 3 most popular subscription durations



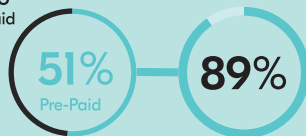
Pre-paid users make up the majority of the market



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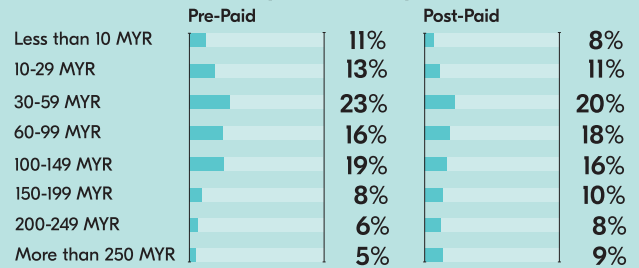
Average subscriptions per person

49% Post-Paid



89% of pre-paid subscribers top-up the same amount recurrently

How much do subscribers spend monthly on subscriptions?



What frustrates subscribers the most



Consumers want one place to buy and manage subscriptions: Super Bundling



Who would subscribers most trust to provide this service



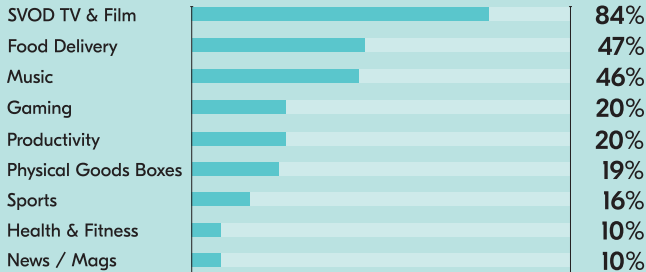


Philippines

Market Overview

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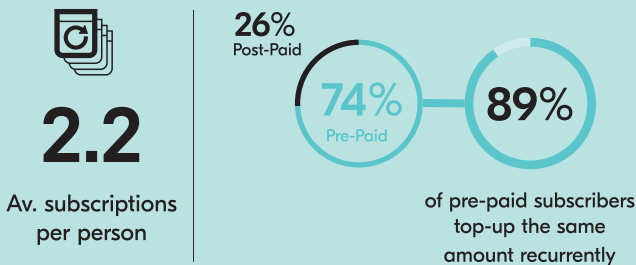
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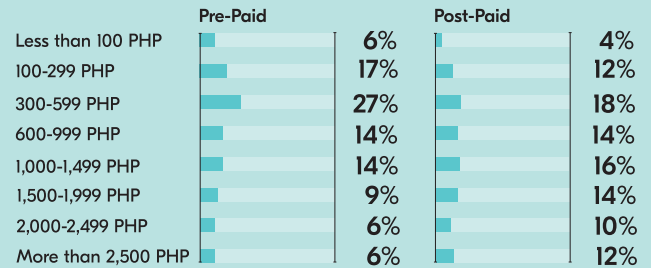
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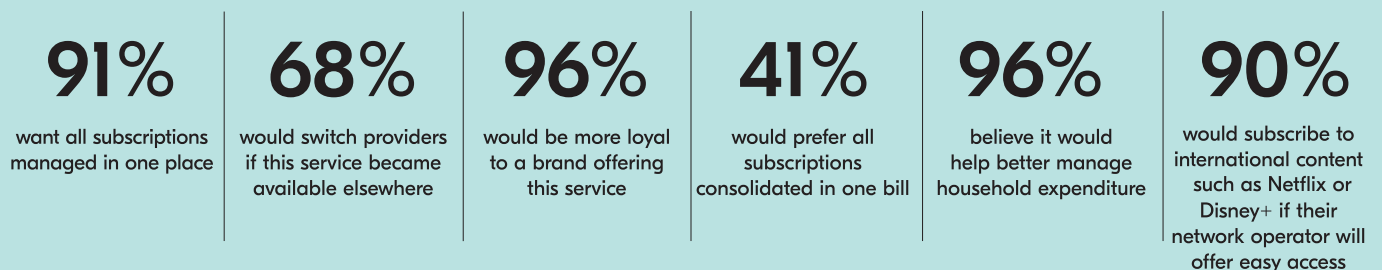
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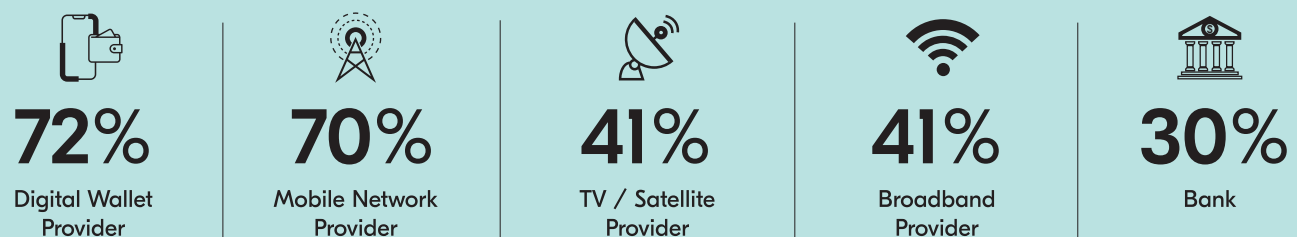
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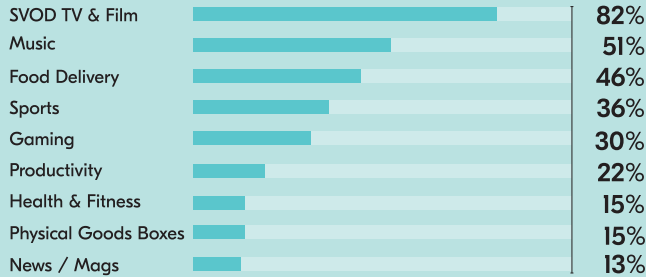


Thailand

Market Overview

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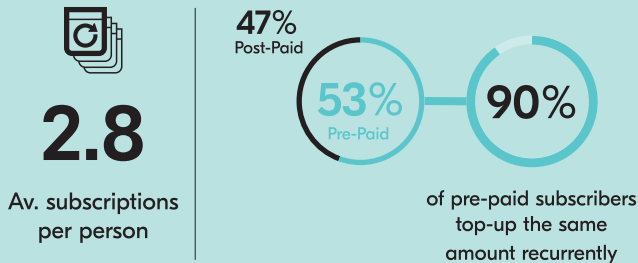
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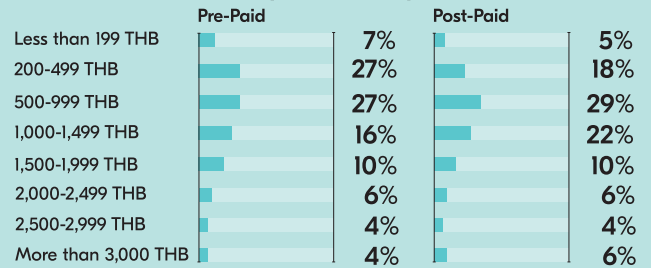
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Pre-paid users make up the majority of the market



How much do subscribers spend monthly on subscriptions?



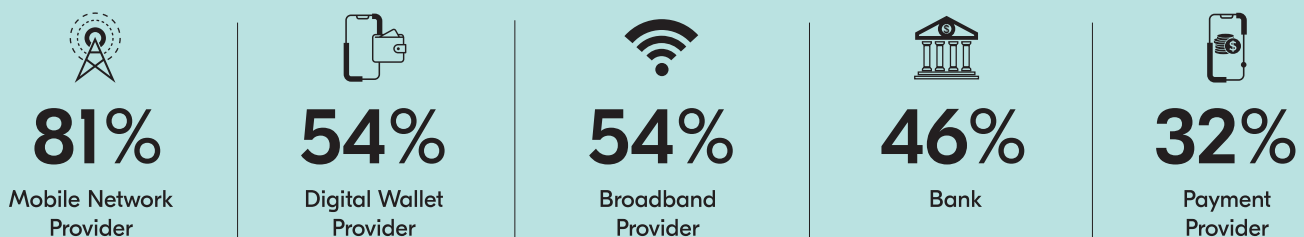
What frustrates subscribers the most such as Netflix or



Consumers want one place to buy and manage subscriptions: Super Bundling

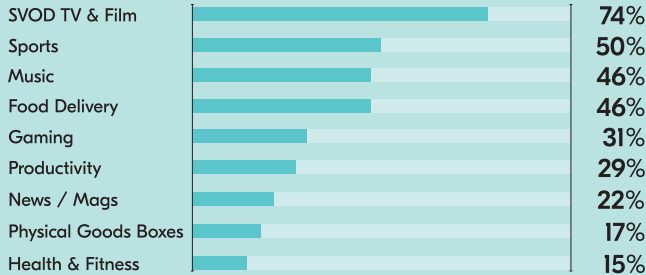


Who would subscribers most trust to provide this service





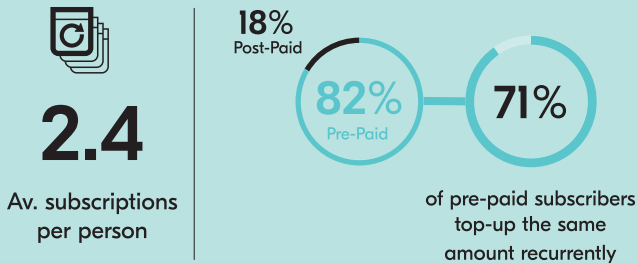
Which subscriptions do consumers subscribe to?



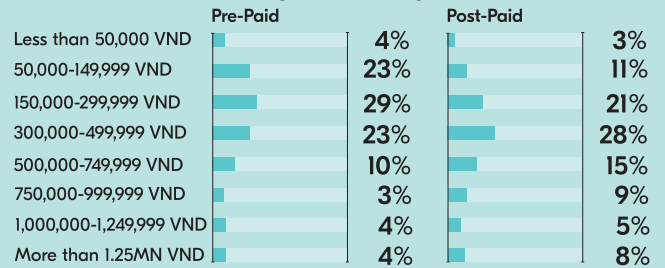
Top 3 most popular subscription durations



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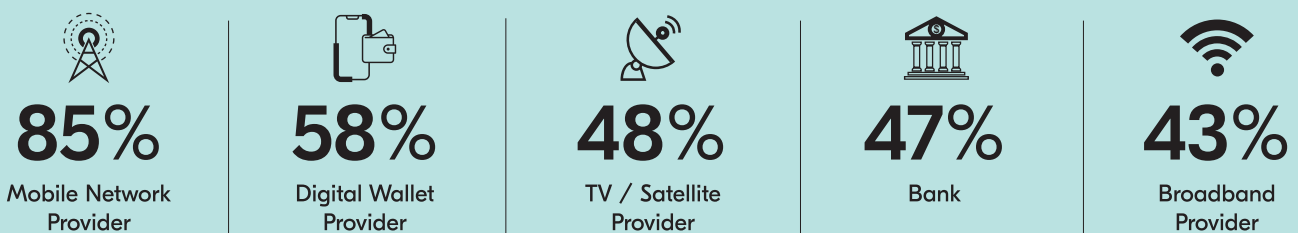
What frustrates subscribers the most



Consumers want one place to buy and manage subscriptions: Super Bundling

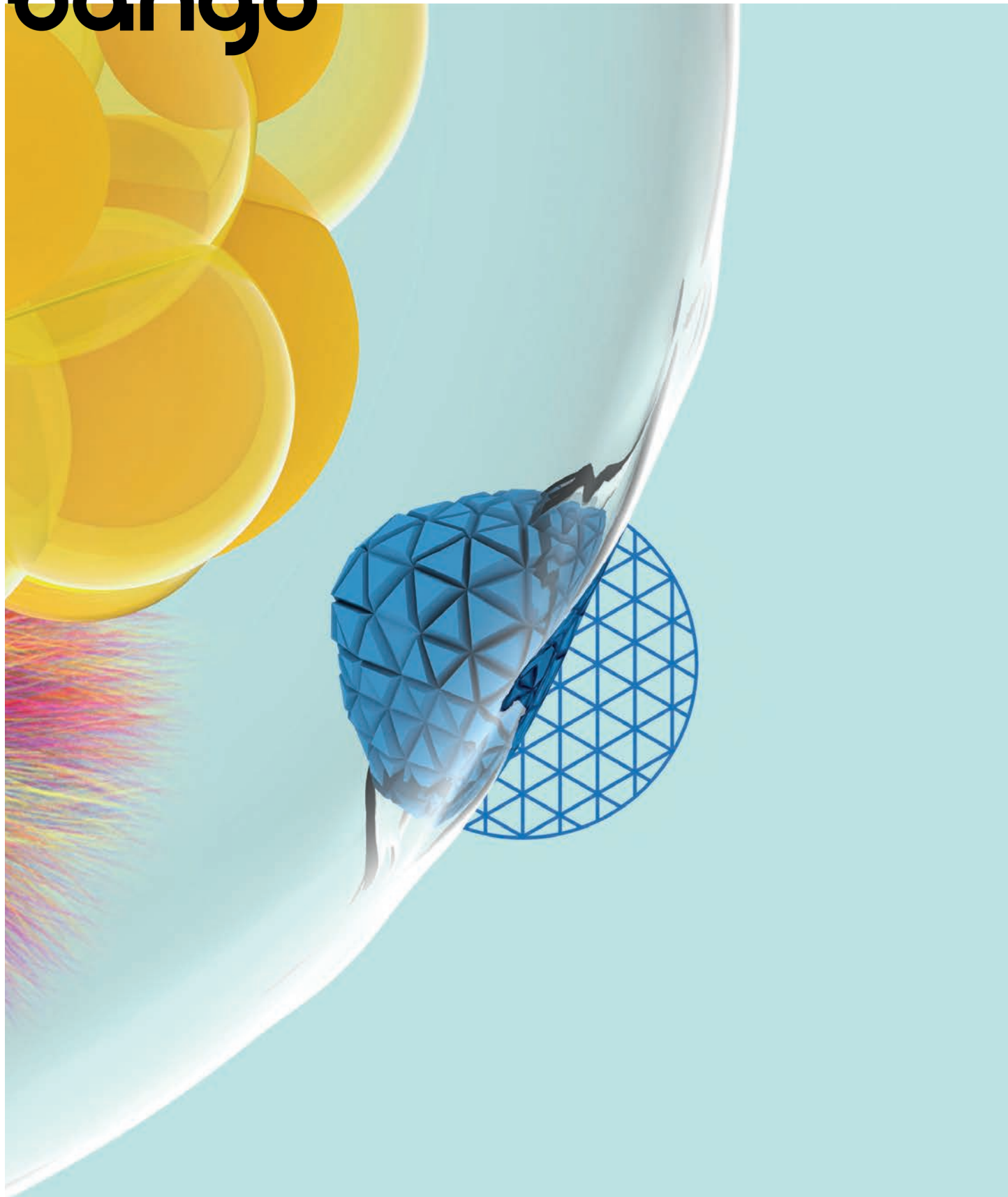


Who would subscribers most trust to provide this service





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