

EU Consumer Research: Subscription Services

 FOCALDATA

 Business
Software
Alliance

October 2025

Methodology.

METHODOLOGY:



Mode: Online survey

Sample:

France: 1,048 consumers

Germany: 1,001 consumers

Italy: 1,120 consumers

Spain: 1,025 consumers



Fieldwork partner: FocalData





(member of British Polling Council and the MRS)



Dates: 12-18 September 2025

DEMOGRAPHICS:

Each market was weighted to appropriate estimates for gender, education, and age.

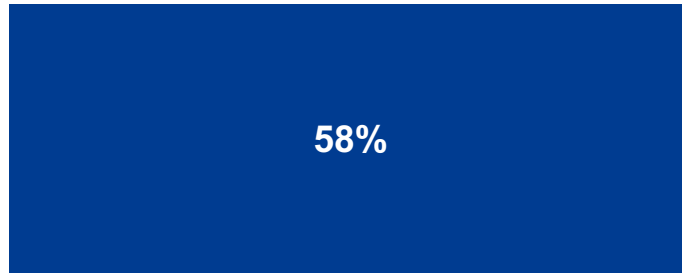
| |  France |  Germany |  Italy |  Spain |
|---------------|--|---|---|---|
| <i>Gender</i> | | | | |
| <i>Male</i> | 48% | 49% | 48% | 48% |
| <i>Female</i> | 52% | 51% | 52% | 52% |
| <i>Age</i> | | | | |
| <i>18-24:</i> | 11% | 9% | 8% | 9% |
| <i>25-44:</i> | 30% | 30% | 28% | 31% |
| <i>45-64:</i> | 33% | 35% | 36% | 36% |
| <i>65+:</i> | 26% | 26% | 28% | 24% |

Findings

Consumer purchasing decisions.

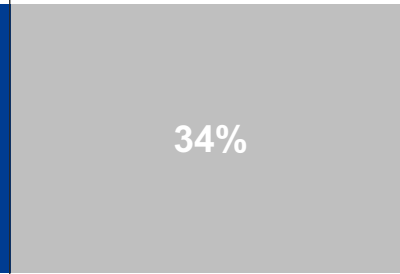
Which comes closer to your view?

Consumers are best equipped to make purchasing decisions on their own **without government intervention.**



58%

Consumers need government intervention to **protect them from companies.**



34%

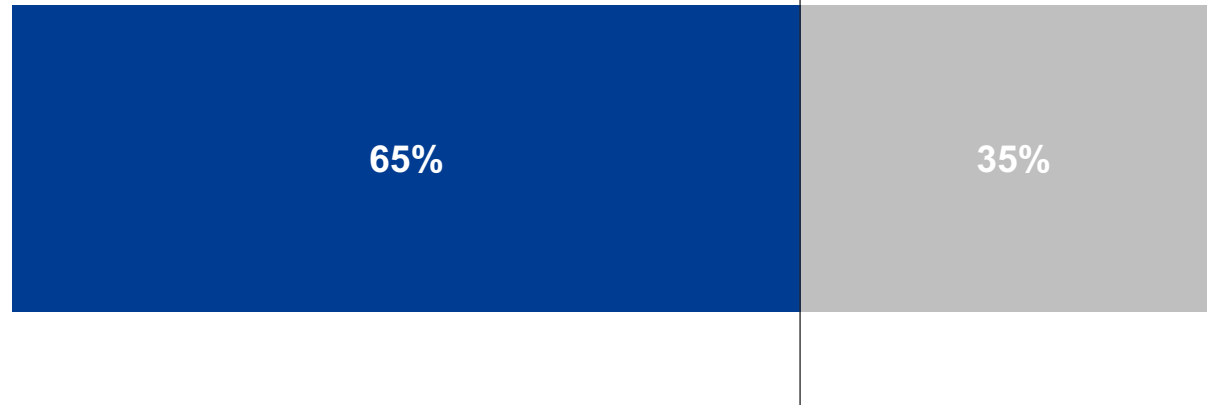
Note: Respondents were given a "not sure" option

Subscription models vs. one-time purchase option.

Which comes closer to your view?

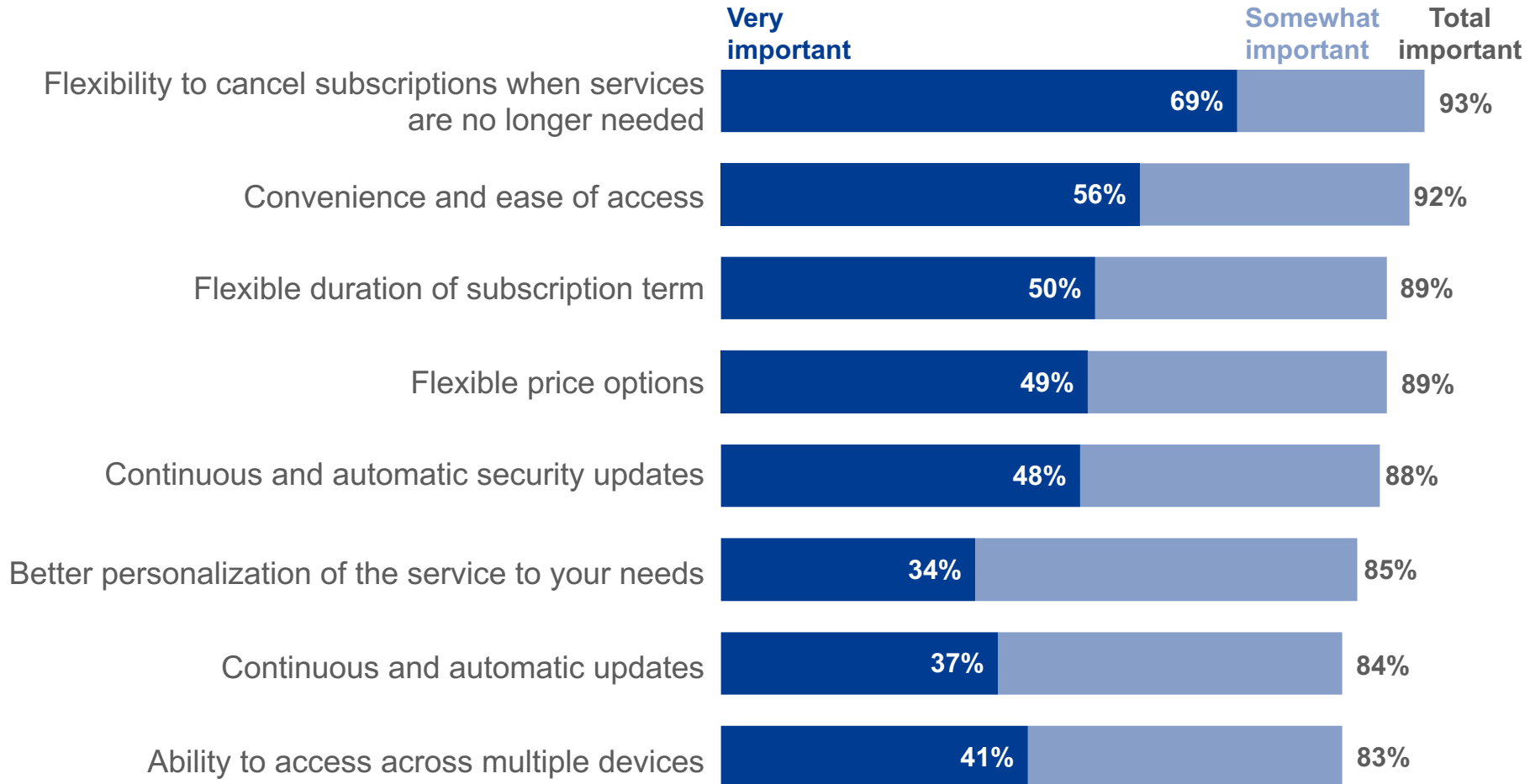
Subscription models provide people with **ongoing access to services or content – and ongoing, automatic software updates** – at a lower upfront cost since companies can offer discounts when they have a predictable revenue stream.

Subscription models **force you to agree to complicated, confusing contracts and pay for ongoing access** to services or content when sometimes all you need is a simple, one-time purchase option.



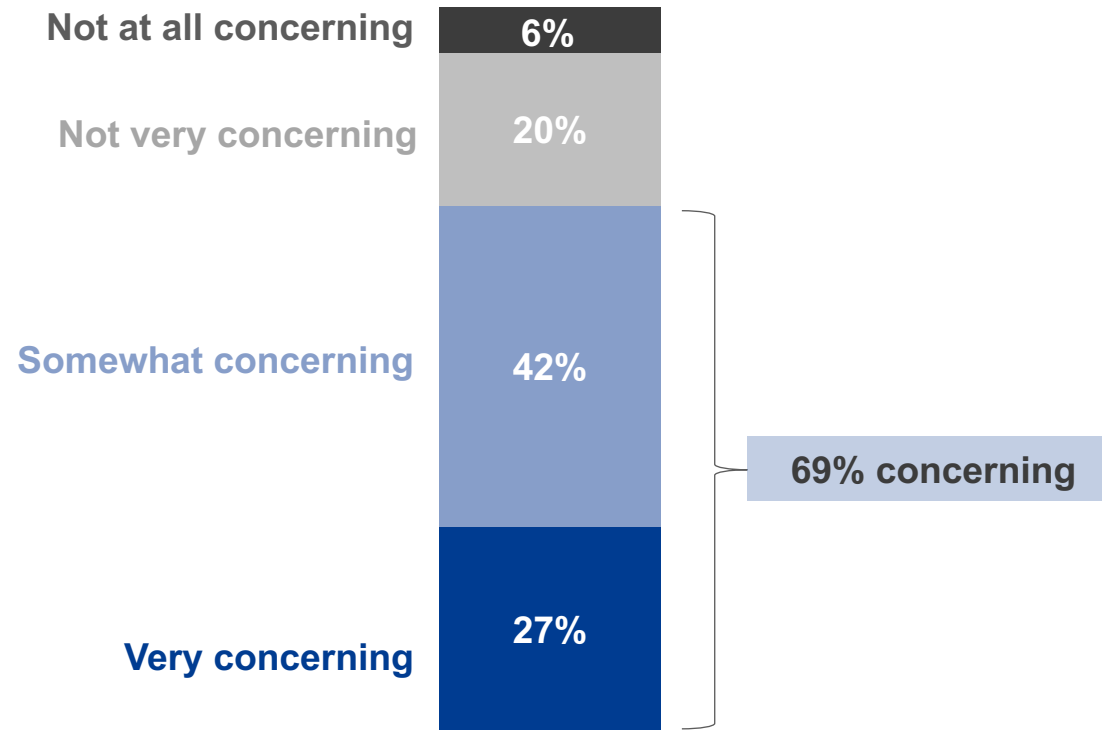
Benefits of a subscription model.

How important is each benefit of subscriptions to you?



Concern over losing access to stored content.

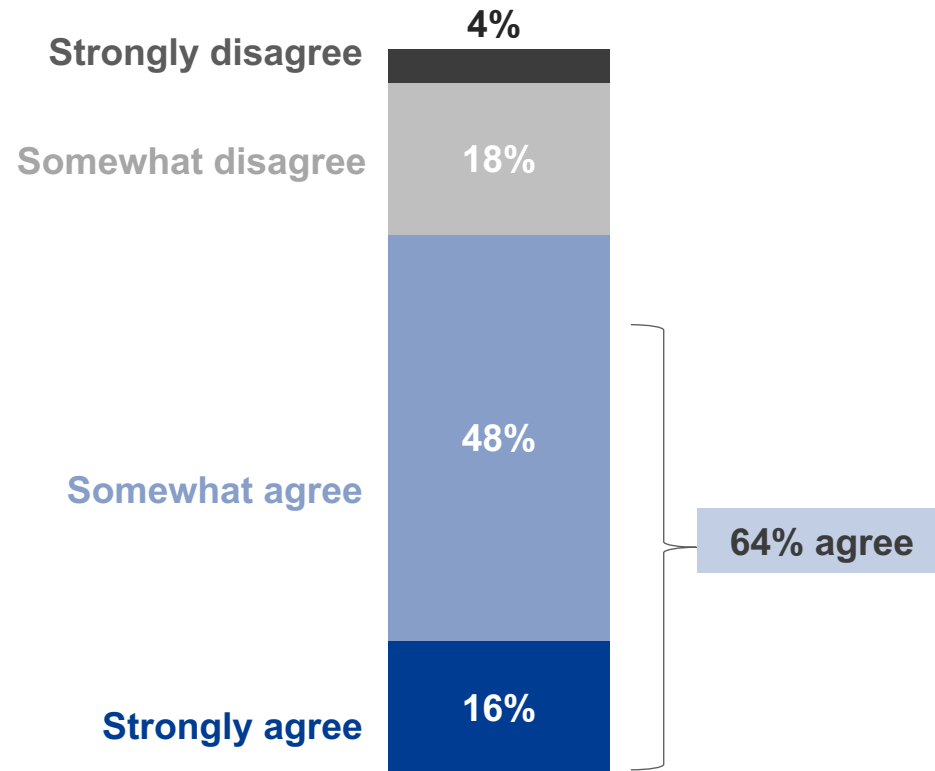
Below is a list of potential concerns with subscription models. How concerning is “Losing access to product preferences or stored content under a subscription service upon cancellation” to you?



Personal vs. professional subscriptions.

Do you agree or disagree with the following:

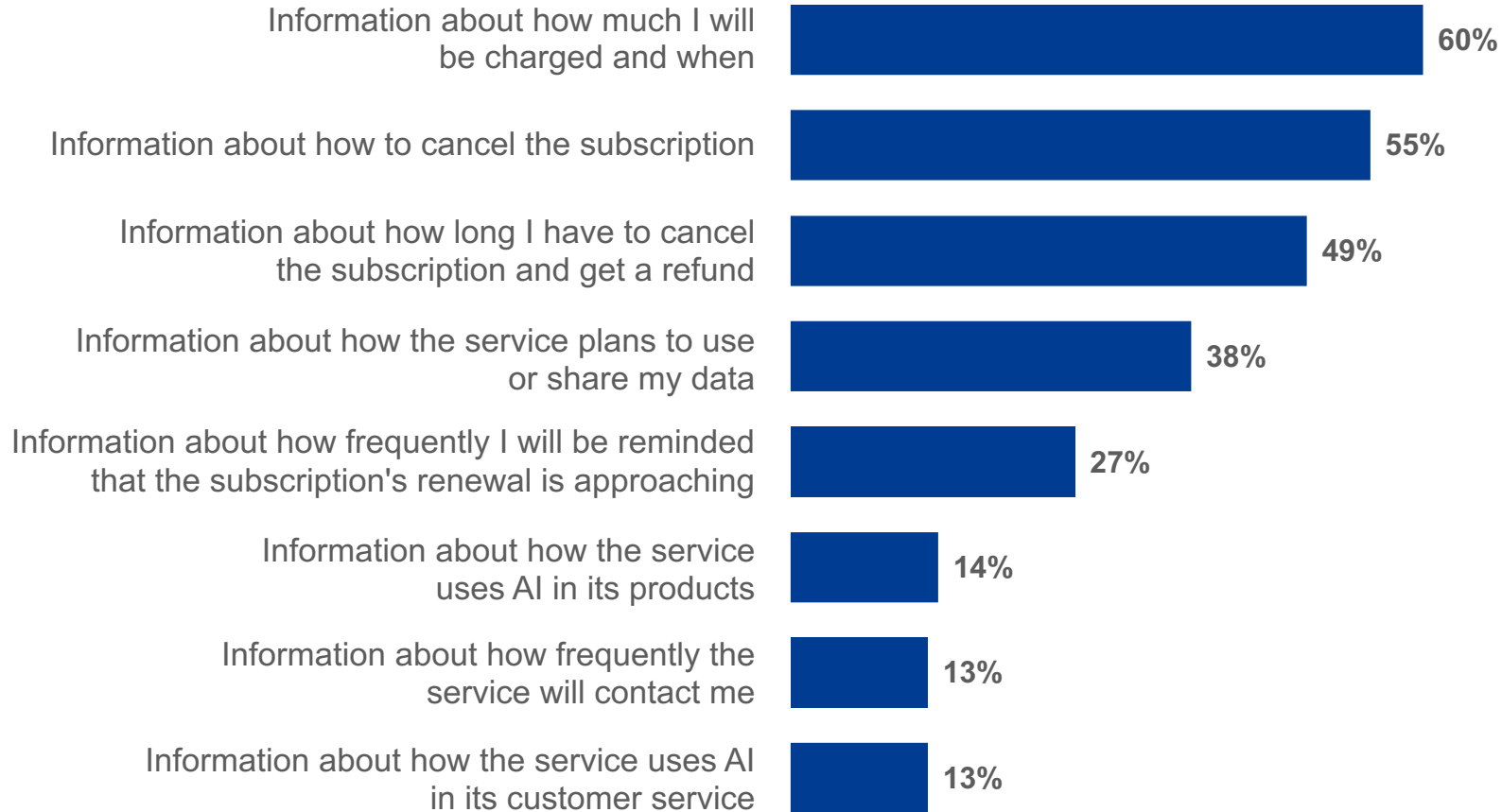
“Subscriptions for personal use such as media streaming and music are different from subscriptions for professional tools like photo editing or other online software.”



Desired information from terms and conditions.

What information are you primarily looking for when you read or skim the terms and conditions of a subscription?

Among those that said they at least skim the terms



Long-term vs. monthly subscription.

Which comes closer to your view?

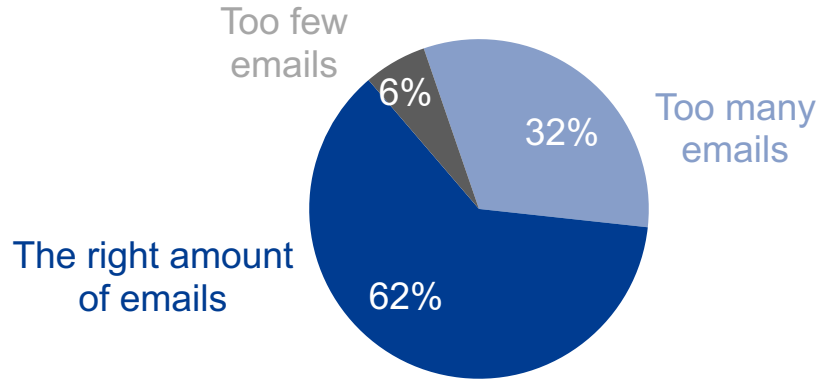
I would prefer to access digital content and services via a **longer-term subscription offered at a discount.**

I would prefer to access digital content and services via a **recurring subscription that can be cancelled any time, but at a higher monthly price.**

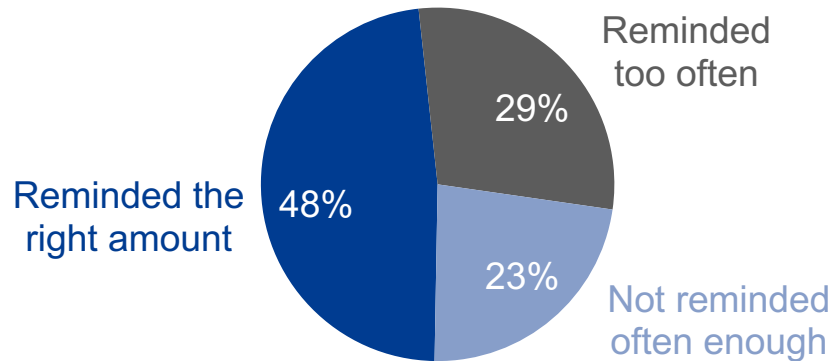


Frequency of communications.

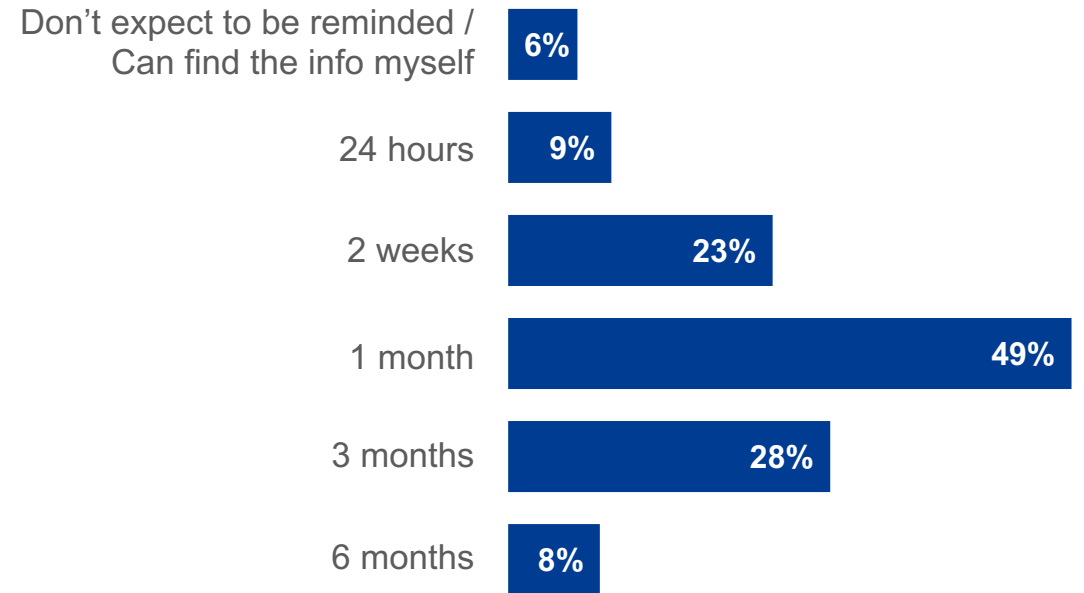
When you sign up for a service or subscription, do you generally feel that the company sends you too many or too few emails about it?



And thinking of your own subscriptions, how do you feel about the frequency of email reminders you receive about upcoming renewal or cancellation deadlines?



When do you expect to be reminded about an upcoming renewal for a 12-month subscription?

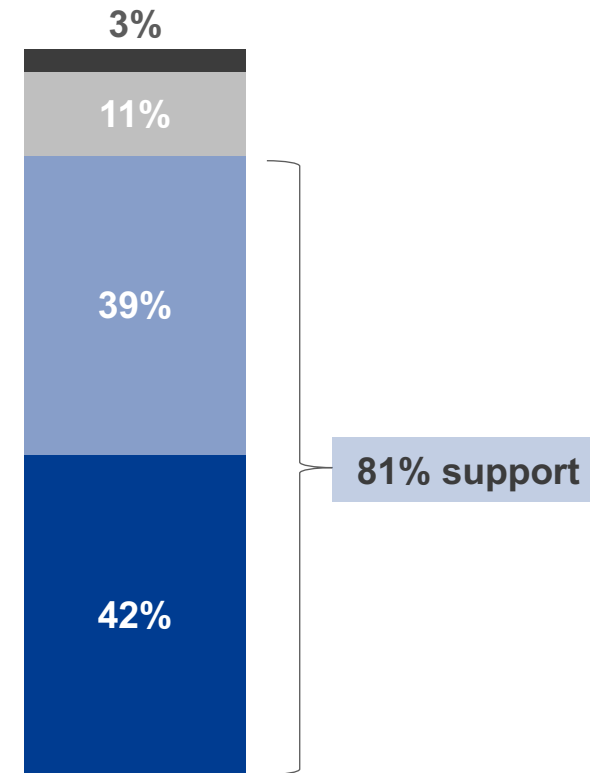
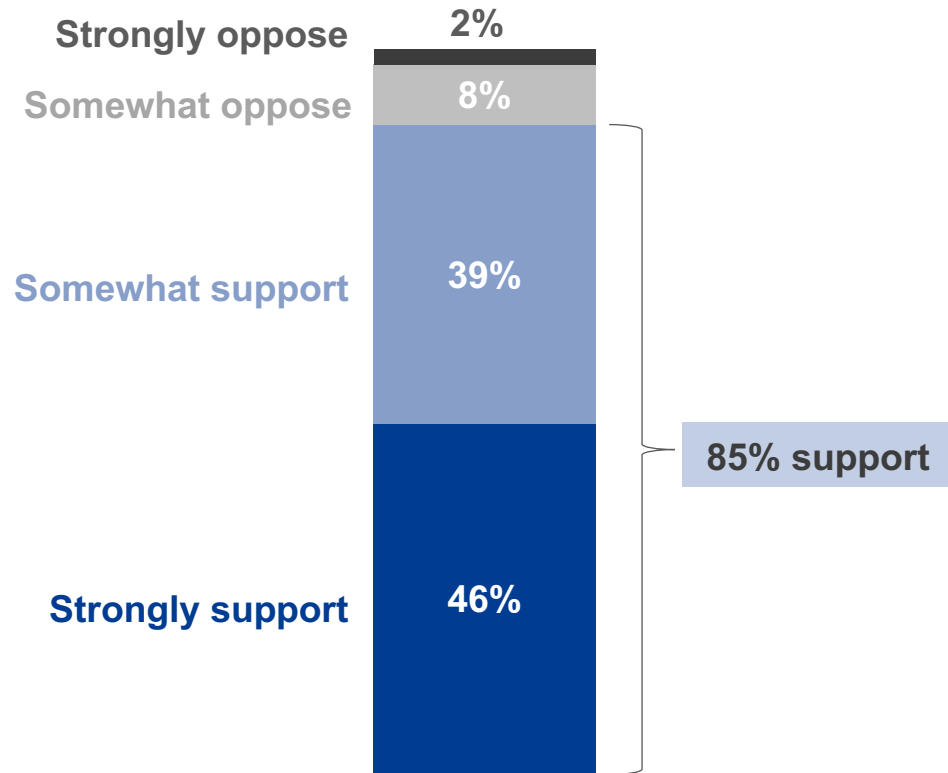


Subscription cancellation policies.

Do you support or oppose...

“Straightforward functionality on the subscription website, such as a cancellation button or link within my account settings”

“Being informed of the consequences of cancellation, such as loss of storage or content”

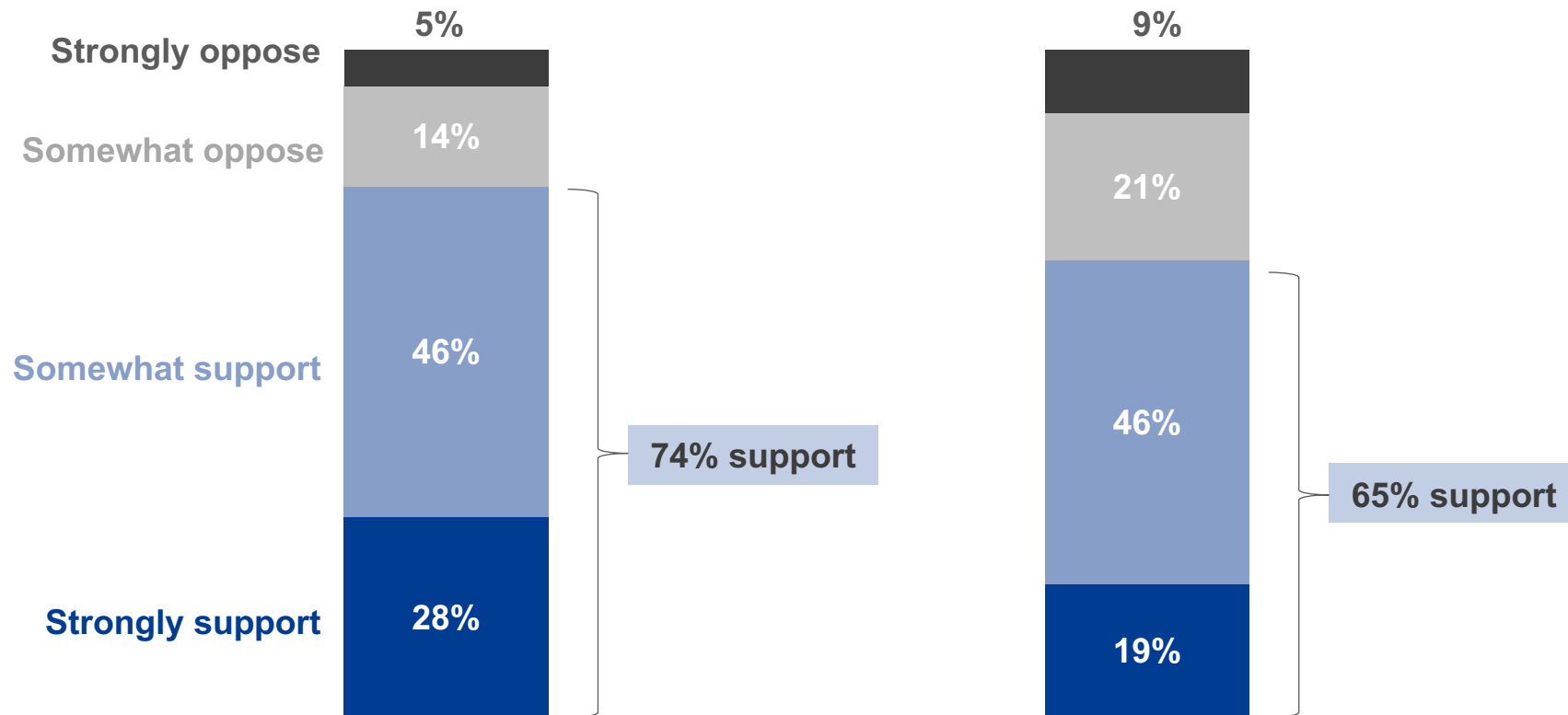


Support for being offered a monetary incentive or to provide feedback upon cancellation.

Do you support or oppose...

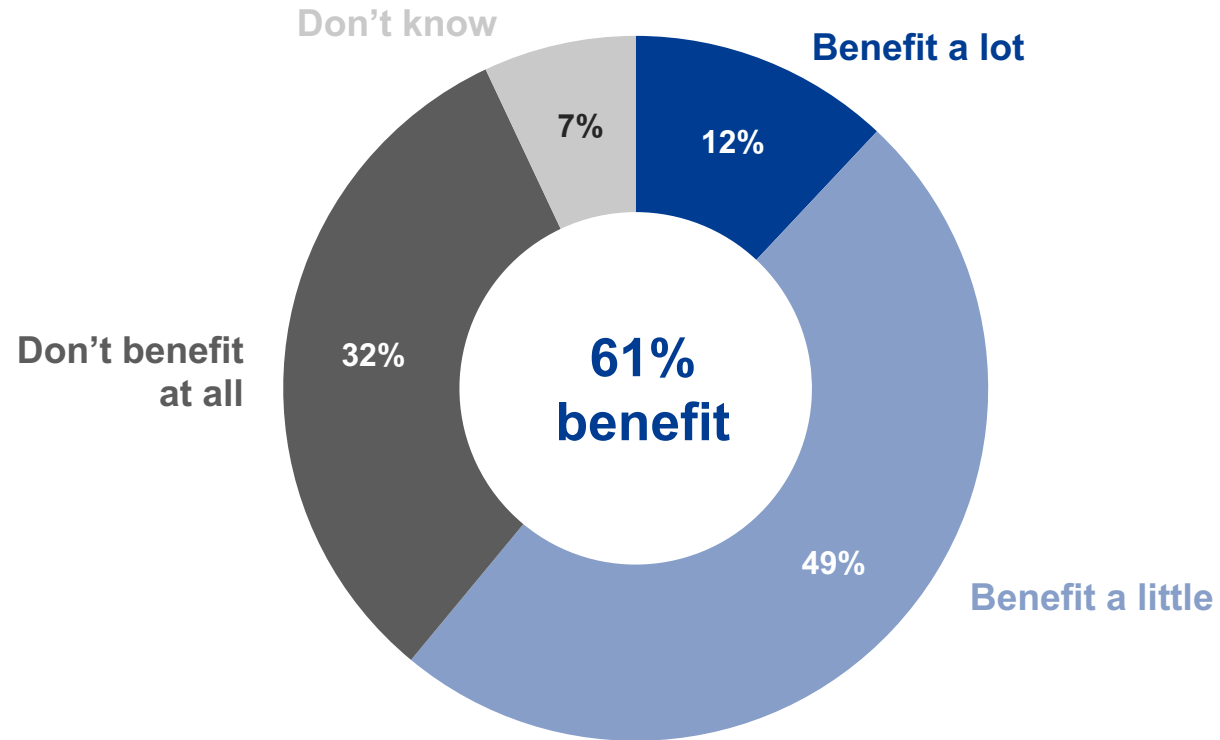
“Being offered a discount or other monetary incentive when I begin the process of cancelling a subscription”

“Being asked to provide feedback on why you are cancelling a subscription to help improve their offering”



Free trials.

Generally speaking, do you benefit from free trials offered by subscription companies?



Thank you.
