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Consumer Management of Digital Subscription Portfolios: A Systematic Literature Review

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ABSTRACT

This study systematically reviews how consumers manage digital subscription portfolios across four interrelated dimensions: accumulation, evaluation, strain, and adjustment. It aims to integrate fragmented research on multihoming, bundling, switching, retention, churn, sharing, access-tier transitions, and other subscription-management behaviors within a broader portfolio perspective. The study employs systematic literature review methodology. A two-phase Scopus search was conducted using predefined search strings and eligibility criteria covering consumer-facing digital subscription services. Following duplicate removal, title-and-abstract screening, and full-text assessment, 13 peer-reviewed studies published between 2015 and 2026 were included. The studies were systematically coded according to their characteristics, theoretical perspectives, behavioral evidence, portfolio mechanisms, consumer decisions, and their relevance to accumulation, evaluation, strain, and adjustment. The evidence was synthesized through descriptive mapping and qualitative cross-study comparison. The review shows that digital subscription management extends beyond isolated decisions such as switching, retention or churn. Consumers may simultaneously accumulate, evaluate, retain, replace, share, or otherwise reconfigure subscriptions. Evaluation and adjustment are the most extensively represented dimensions, while strain remains comparatively underdeveloped and fragmented across affordability, switching and lock-in frictions, fragmentation, privacy, coordination, and management-related burdens. The evidence also indicates substantial overlap among the four dimensions but does not support a fixed sequential or causal Accumulation–Evaluation–Strain–Adjustment process. Methodologically, the literature relies largely on intentions, stated or hypothetical choices, self-reported configurations, and analytical or predictive models rather than directly observed portfolio behavior. This review contributes by shifting the unit of analysis from isolated subscription decisions toward a digital subscription portfolio perspective. It integrates previously separate research streams through a four-dimensional organizing framework while preserving distinctions among different mechanisms, decisions, and evidence types. The review also identifies portfolio strain, longitudinal behavioral evidence, cross-market generalizability, and integrative portfolio-level modeling as important priorities for future research.

1. INTRODUCTION

Digital subscription services are playing an important role in providing digital content and services especially in the areas of video streaming, news, entertainment and other online platforms. As subscription-based offerings expand consumers may no longer interact with one provider or service in isolation, but instead they may hold multiple subscriptions simultaneously, bundle services, use competing platforms, share access or move between different subscription levels. Recent studies illustrate this growing diversity through multihoming across OTT platforms (Sarraf & Kar, 2026; Uppal et al., 2026), simultaneous subscriptions across digital-content categories (Shim et al., 2025), bundled pay-TV and OTT configurations (Kim et al., 2021; Kim & Kim, 2024), digital-news bundles (Park et al., 2026), and shared subscription arrangements (Wu et al., 2026). Such developments make consumer subscription behavior increasingly relevant, not only at the level of individual service adoption, but also at the level of the broader set of subscriptions that the consumer holds and manages.

The current literature remains fragmented regarding individual subscription behaviors and decision contexts. Some of the studies focus on switching and retention (Chang & Chiu, 2023), others distinguish complete from partial switching (Meier et al., 2026), while other research examines multihoming (Sarraf & Kar, 2026; Uppal et al., 2026), bundling (Kim et al., 2021; Park et al., 2026), churn prediction (Mohan & Jadhav, 2022), access-tier transitions (Kim et al., 2025; Tsai, 2023), subscription sharing (Wu et al., 2026), and fragmentation-driven multiple subscriptions (Budzinski et al., 2019). All of these studies offer important but fragmented explanations of how consumers construct and change subscription configurations rather than a single portfolio-level account. This fragmentation is also shown in the reviewed corpus by the presence of similar portfolio states through substantially different mechanisms and decisions.

Previous reviews identified during the review process focus on related subscription phenomena but do not directly synthesize the management of multiple consumer digital subscriptions as a portfolio. Wu et al. (2024) reviewed member subscription services in retailing and organize the literature through subscription types, target consumers, membership journey stages, and provider strategies. In contrast, Muratcehajic and Loureiro (2024) systematically reviewed the subscription specific customer retention and develop a Subscriber Retention Management framework regarding the determinants and management of retention. These reviews offer useful insights into membership and retention respectively, but do not go far enough to synthesize the broader question of how consumers manage multiple digital subscriptions as interconnected configurations.

Addressing this gap is relevant both conceptually and managerially. From the consumer side, having multiple subscriptions means simultaneous value, affordability, content, alternatives, switching costs, and convenience considerations (Chang & Chiu, 2023; Kim & Kim, 2024; Meier et al., 2026; Park et al., 2026; Sarraf & Kar, 2026) and creates potential burdens such as fragmentation, lock-in, coordination, privacy, and subscription management (Budzinski et al., 2019; Kim & Kim, 2024; Sarraf & Kar, 2026; Wu et al., 2026). From a managerial perspective, consumer decisions are no longer limited to acquiring or canceling, but are increasingly about partial switching (Meier et al., 2026), multihoming (Sarraf & Kar, 2026; Uppal et al., 2026), tier transitions (Kim et al., 2025; Tsai, 2023), sharing (Wu et al., 2026) and bundle-configuration choices (Kim et al., 2021; Park et al., 2026). The evidence that is currently available therefore suggests that traditional single-service outcomes such as adoption, retention or churn represent just a part of the wider subscription-management problem. Therefore, this systematic review of the literature aims to respond to the following research question:

RQ: How do consumers manage digital subscription portfolios across accumulation, evaluation, strain, and adjustment?

The review addresses this question by synthesizing research on consumer-facing digital subscription services across four analytically distinct, but potentially overlapping dimensions: Accumulation (formation or expansion of multi-subscription configurations), Evaluation (assessments of value, cost, utility, alternatives, and service attributes), Strain (burdens and frictions associated with subscription configurations), and Adjustment (ways consumers modify those configurations through behaviors such as switching, retention, sharing, tier transitions, and other forms of reconfiguration). These dimensions are a review-level organizing framework rather than a validated causal sequence or established theory. The review attempts to create a more comprehensive understanding of consumer digital subscription portfolio management, identify conceptual and empirical gaps in the existing body of evidence, and determine future research directions by combining studies that have previously addressed these behaviors independently.

2. LITERATURE REVIEW AND CONCEPTUAL FOUNDATION

2.1. Digital subscription services and Multi-subscription behavior

The reviewed literature examines digital subscription services in settings involving multiple, bundled, or interrelated service choices rather than only isolated subscription decisions. For example, Shim et al. (2025) examined current relationships among several digital subscription categories including subscription video-on-demand (SVOD), music streaming, newsletters, e-books, educational content, and knowledge-information services. Their findings identify both positive and negative associations across subscription categories, indicating that concurrent subscription use may involve complementary as well as substitutive relationships. However, such associations do not imply that all subscriptions constitute a deliberately coordinated portfolio. To add more, multihoming represents a more explicit form of simultaneous subscription use, Sarraf and Kar (2026) examined consumers who maintain memberships across multiple OTT services and investigate configurations of functional, social, epistemic, and experiential values associated with the intention to multihome. Uppal et al. (2026) considered a different form of multihoming in which alliances between competing streaming services facilitate integrated access across platforms. Because their analysis is game-theoretic, its implications concern modeled consumer and market outcomes rather than directly observed adoption. Bundling provides another route to multi-service access, in which Kim et al. (2021) examined consumer preferences for pay-TV–OTT bundles, while Park et al. (2026) analyzed preferences for news packages combined with other digital content, these studies capture stated or hypothetical package choices rather than direct observation of how consumers subsequently manage multiple subscriptions. Additionally, multi-service access can therefore arise through concurrent holding, multihoming, complementary or substitutive relationships, bundled provision, or integrated access arrangements. Notably, these configurations differ both behaviorally and evidentially and should not be treated as interchangeable manifestations of a single form of multi-subscription behavior.

2.2. Consumer continuance, switching, and subscription adjustment

Literature examines several forms of subscription adjustment that extend beyond simple cancellation, Chang and Chiu (2023) investigated switching and retention intentions in OTT services, while Kim and Kim (2024) examined provider choice under switching costs, brand loyalty, and reference-dependent preferences using a discrete-choice design. Other studies focus on changes in access arrangements, Tsai (2023) examined free users' intentions to move toward paid OTT services, whereas Kim et al. (2025) investigated intentions to adopt ad-supported plans among premium subscribers and non-subscribers, these studies therefore represent different forms of behavioral intention or stated choice rather than a uniform record of realized subscription change.

A particularly important distinction concerns complete and partial switching, Meier et al. (2026) distinguished complete switching in which the incumbent service is replaced, from partial switching where the incumbent is retained while an alternative service is added. Partial switching can therefore expand a consumer's subscription configuration rather than simply constitute a weaker form of replacement. Churn and sharing represent further, non-equivalent forms of adjustment, Mohan and Jadhav (2022) used multiple-subscription status and switching frequency as predictors in churn models and their evidence supports predictive classification and association rather than a causal claim that holding multiple subscriptions produces churn. By contrast, Wu et al. (2026) analytically model choices between individual and shared subscription plans and examine implications for pricing, access, consumer surplus, and welfare, since this evidence is model-derived it should not be interpreted as direct observation of realized subscription-sharing behavior. Taken together, retention, provider switching, complete switching, partial switching, churn, access-tier transitions, and subscription sharing all concern the continuation or modification of subscription arrangements, but they represent conceptually distinct consumer decisions.

2.3. Theoretical perspectives in digital subscription research

The included studies draw on diverse theoretical perspectives to explain subscription-related decisions, the Push–Pull–Mooring (PPM) framework has been adapted to consumer service-provider switching by distinguishing factors that push consumers away from an incumbent provider, pull them toward alternatives, and moor them to their current choice (Bansal et al., 2005). Within the included corpus, Chang and Chiu (2023) applied PPM to OTT switching and retention intentions, while Tsai (2023) used the framework to examine free-to-paid switching intention.

Reference-dependent preferences and loss aversion provide a different explanation of consumer choice, Tversky and Kahneman (1991) conceptualized choice as dependent on a reference point, with losses potentially exerting a stronger influence on preferences than equivalent gains. Kim and Kim (2024) applied this perspective to switching costs, brand loyalty, and stated choice in OTT bundled services, which explicitly draws on Tversky and Kahneman (1991) regarding reference points, status-quo effects, and loss aversion.

Expectation Disconfirmation Theory explains satisfaction through the relationship between prior expectations, perceived performance, and resulting confirmation or disconfirmation (Oliver, 1980). Within the reviewed literature, Meier et al. (2026) used this perspective when examining configurations associated with complete and partial switching. Meanwhile, the Theory of Consumption Values proposes that consumer choice may reflect multiple dimensions of perceived value (Sheth et al., 1991). Sarraf and Kar (2026) applied this perspective configurationally to OTT multihoming and combine it with Complexity Theory to examine how combinations of conditions can produce outcomes through conjunction, causal asymmetry, and equifinality. Other studies relied on different theoretical or analytical foundations, for example, Kim et al. (2025) combined a uses and Gratifications perspective with a motivation-based approach to examine intentions toward ad-supported OTT plans. Economic, utility-based, or media-economics approaches underpin studies of bundling, alliance-enabled multihoming, subscription sharing, and package choice, including Kim et al. (2021), Park et al. (2026), Uppal et al. (2026), and Wu et al. (2026). Other included studies are primarily empirical, predictive, or policy-oriented without foregrounding a single formal consumer theory. Thus, the theoretical perspectives represented in literature illuminate different subscription decisions rather than constituting a unified theory of digital subscription portfolio management.

2.4. From fragmented subscription decisions to a portfolio-management perspective

Existing research provides relevant but distributed accounts of switching, retention, multihoming, bundling, sharing, churn, access-tier transitions, cross-category relationships, and structural fragmentation. Similar multi-subscription configurations may therefore arise through different routes, they may reflect voluntary multihoming, complementary service use, partial switching, bundled or alliance-enabled access, shared arrangements, or structurally fragmented access requiring multiple subscriptions. Budzinski et al. (2019), for example, analyzed policy setting in which fragmented football broadcasting arrangements can result in consumers needing multiple streaming subscriptions. In this review, digital subscription portfolio management is used as a review-level integrative perspective rather than as an established theory or a framework explicitly adopted by the included studies. The portfolio perspective allows related behaviors to be examined together while preserving distinctions among how subscriptions are simultaneously held, added, retained, replaced, bundled, integrated, shared, or experienced as fragmented. It also preserves differences among current behavior, behavioral intention, stated or hypothetical choice, predictive evidence, analytical modeling, and conceptual or policy reasoning. The existing literature thus provides relevant components of portfolio management, but these components remain distributed across different decision contexts and explanatory perspectives, providing the rationale for a systematic portfolio-level synthesis.

2.5. Conceptual organizing framework for the review

To organize this dispersed literature, the present review adopts four analytically distinct but potentially overlapping domains: Accumulation, Evaluation, Strain, and Adjustment. These domains constitute a review-level organizing framework rather than a theory proposed by any single included study. Moreover, accumulation concerns the formation or expansion of multi-subscription configurations through mechanisms such as simultaneous holding, multihoming, bundling, or the addition of services, phenomena represented across studies of cross-category subscriptions, bundles, and multihoming (Kim et al., 2021; Park et al., 2026; Sarraf & Kar, 2026; Shim et al., 2025). Evaluation concerns consumers' assessment of subscriptions or configurations through considerations such as price, perceived value, content, utility, affordability, convenience, switching costs, and service attributes (Kim & Kim, 2024; Park et al., 2026; Sarraf & Kar, 2026). Strain refers to burdens or frictions associated with subscription configurations where such burdens are represented in the literature, including financial constraints, switching or lock-in friction, fragmentation, management burden, privacy concerns, and coordination costs (Budzinski et al., 2019; Kim & Kim, 2024; Uppal et al., 2026; Wu et al., 2026). To add more, adjustment concerns the continuation or modification of subscription configurations through switching, retention, partial switching, churn or cancellation, sharing, access-tier transitions, rebundling, or related changes (Chang & Chiu, 2023; Meier et al., 2026; Mohan & Jadhav, 2022; Tsai, 2023; Wu et al., 2026).

The four dimensions may overlap and interact, but they are not proposed as a validated causal model, a sequential consumer journey, or an established Accumulation → Evaluation → Strain → Adjustment process. Their purpose is to provide a consistent analytical structure through which the heterogeneous subscription behaviors represented in the literature can subsequently be synthesized.

3. RESEARCH METHODOLOGY

3.1. Review design and reporting approach

This study employed a systematic literature review (SLR) to identify, evaluate, and synthesize research concerning consumer management of digital subscription portfolios. The SLR approach provides a structured means of reviewing an existing body of knowledge through explicit and reproducible procedures for literature identification, selection, and synthesis (Tranfield et al., 2003). The review was therefore conducted using a predefined search strategy, explicit eligibility criteria, staged screening, structured data extraction, and framework-based synthesis.

The study-selection process was documented using PRISMA reporting guidance (Page et al., 2021) to provide a transparent account of study identification, screening, full-text assessment, and final inclusion. Predefined inclusion and exclusion criteria were established before screening to promote consistency and transparency throughout the selection process (Booth et al., 2021). The methodological process comprised two complementary Scopus searches, deduplication, title-and-abstract screening, full-text eligibility assessment, structured extraction and coding, and qualitative synthesis of the final included studies.

3.2. Search strategy and information source

Scopus was used as the bibliographic database for study identification. A two-phase search strategy was adopted to balance conceptual precision with adequate coverage of the literature. The first phase targeted terminology directly associated with multiple digital subscriptions and portfolio-level behavior, whereas the second phase broadened the search to capture related subscription decisions and adjustment behaviors that might not explicitly employ portfolio terminology.

3.2.1. Phase One: Core portfolio search

The first search targeted studies explicitly addressing multiple digital subscriptions, subscription fatigue and overload, subscription portfolios, multihoming, cycling, rotation, and related phenomena. The following Boolean expression was applied to titles, abstracts, and keywords:

TITLE-ABS-KEY(("digital subscription*" OR "subscription service*" OR "subscription-based service*" OR "streaming service*" OR "online subscription*" OR OTT) AND ("subscription fatigue" OR "subscription overload" OR "subscription saturation" OR "subscription portfolio*" OR "multi-subscription*" OR "multiple subscription*" OR "subscription cycling" OR "subscription rotation" OR ((multihoming OR "multi-homing") AND (subscription* OR streaming OR OTT))) AND (consumer* OR customer* OR subscriber*))

The core search initially returned 11 records. Predefined Scopus filters were then applied. Publications were limited to the period 2015–2026, the English language, and journal source type. Document types were restricted to Article and Review, while the selected subject areas were Business, Management and Accounting; Economics, Econometrics and Finance; Social Sciences; and Decision Sciences. Following application of these filters, 7 records remained.

3.2.2. Phase Two: Supporting behavioral search

Because studies relevant to portfolio management may examine consumer responses without explicitly using terms such as "subscription portfolio" or "multihoming," a second supporting search was conducted. This search targeted behaviors and outcomes including cancellation, discontinuance, non-renewal, switching, downgrading, pausing, churn, resistance, willingness to subscribe, underutilization, perceived waste, account sharing, and bundling.

The following Boolean expression was used:

TITLE-ABS-KEY(("digital subscription*" OR "subscription service*" OR "subscription-based service*" OR "streaming service*" OR "online subscription*" OR OTT) AND (cancellation OR discontinuance OR nonrenewal OR "non-renewal" OR switching OR downgrade* OR pausing OR churn OR resistance OR "willingness to subscribe" OR underutilization OR "perceived waste" OR "account sharing" OR bundling) AND (consumer* OR customer* OR subscriber*)) AND NOT TITLE-ABS-KEY(network* OR protocol* OR routing OR bandwidth OR handover OR seller* OR merchant* OR driver* OR advertiser*)

The supporting search initially retrieved 93 records. Application of the same publication-year, language, document-type, source-type, and subject-area filters reduced this set to 40 records.

The two search outputs were then merged, producing 47 records. Three records were duplicated across the two search phases and were removed, leaving 44 unique records. Two additional records fell outside the predefined 2015–2026 publication period and were removed before formal screening. Consequently, 42 records proceeded to title-and-abstract screening.

3.3. Eligibility criteria

As seen in table 1, predefined inclusion and exclusion criteria were applied consistently across the retrieved records to support transparency and consistency in the study-selection process (Booth et al., 2021). Eligibility was assessed according to publication characteristics, digital-subscription context, consumer-level focus, portfolio relevance, and analytical contribution.

Table 1. Inclusion and exclusion criteria

Criterion	Inclusion	Exclusion
	English, Peer-reviewed journal Articles/ Reviews, 2015-2026	Non-English, non-journal, non-per-reviewed, pre-2015
Context	Consumer-facing digital subscription services	Physical subscriptions, B2B/ enterprise subscriptions
Consumer focus	consumer/ subscriber behavior or decisions	Provider-side or technical focus only
Portfolio relevance	Relevant to Accumulation, Evaluation, Strain, or Adjustment	No clear relevance to any of the four dimensions
Analytical contribution	Portfolio-related concepts are used in analysis/findings/interpretation	Mentioned only incidentally or descriptively

A study was not required to use the term "portfolio" explicitly, but it had to make a substantive contribution to understanding the accumulation, evaluation, strain, or adjustment of digital subscriptions.

3.4. Study selection and screening process

The study-selection process is summarized in Figure 1 using a PRISMA flow diagram (Page et al., 2021). Following the two Scopus searches, 47 records were identified. After removing three duplicates and two records outside the predefined publication period, 42 records underwent title-and-abstract screening. Nineteen records were excluded at this stage, leaving 23 studies for full-text assessment. Ten additional studies were excluded following full-text review, resulting in a final sample of 13 studies.

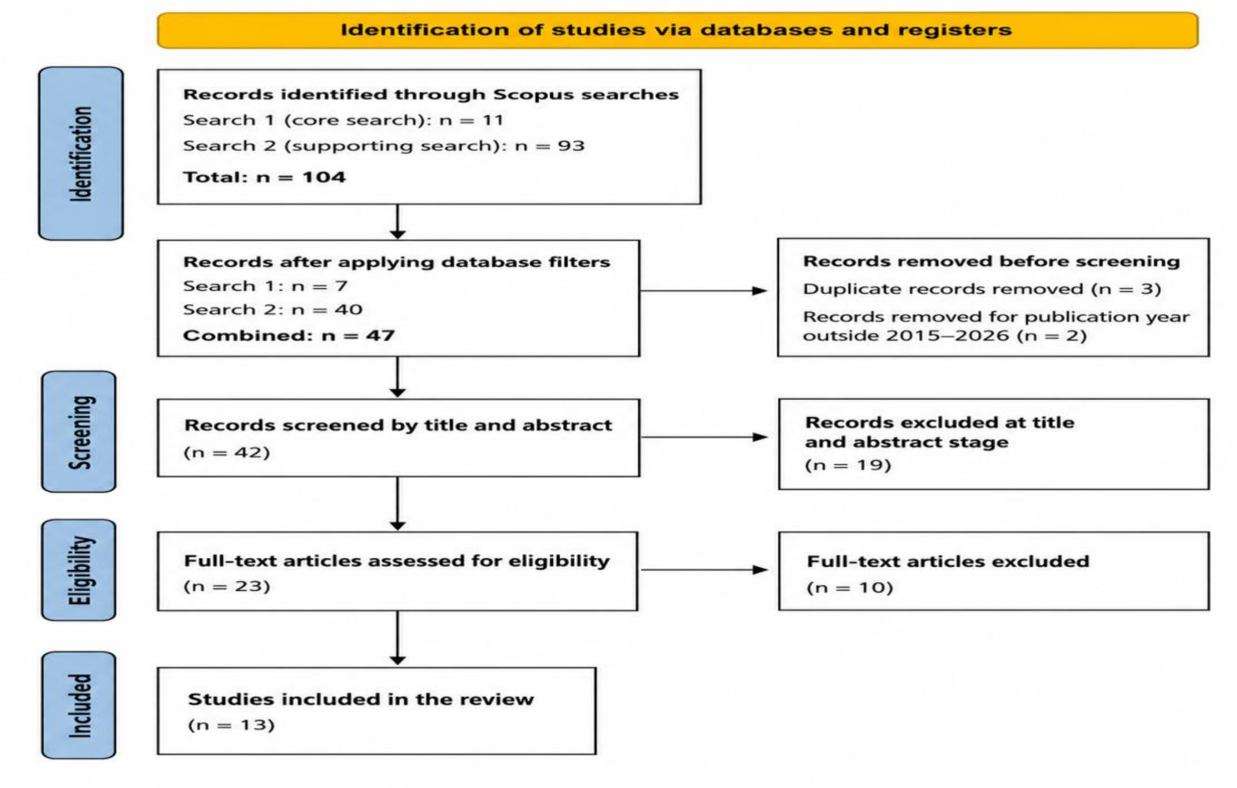

Figure 1. PRISMA flow diagram of the study-selection process

3.5. Data extraction and synthesis

Data from the 13 included studies were extracted using a structured framework covering study characteristics, subscription context, theoretical perspective, behavioral evidence, portfolio mechanisms and decisions, key findings, limitations, consumer consequences, and managerial or policy implications. Each study was also coded against the four organizing dimensions; Accumulation, Evaluation, Strain, Adjustment as Primary, Secondary, or Not Present according to its substantive analytical content. The extracted evidence was synthesized qualitatively through descriptive mapping and cross-study thematic comparison; no statistical meta-analysis was conducted because of heterogeneity in study designs, contexts, and evidence types.

4. REVIEW RESULTS

4.1. Characteristics of included studies

The final review comprised 13 studies published between 2019 and 2026. As shown in Table 2, the included studies span multiple geographic settings, subscription-service contexts, methodological approaches, theoretical orientations, and forms of behavioral evidence.

Table 2. Characteristics of the included studies

Study ID	Country	Data collection period	Subscription context	Study design / method	Sample	Theoretical framework	Behavior type
37 – Kim & Kim (2024)	South Korea	NR	Pay-TV–OTT bundles	Discrete choice experiment; mixed logit + reference-dependent choice + 2SLS	N = 610	Reference-Dependent Preferences and Loss Aversion	Hypothetical choice / stated preference
18 – Chang and Chiu (2023)	Taiwan	Apr–May 2020	OTT / video streaming	Cross-sectional survey; PLS-SEM	N = 500	Push–Pull–Mooring (PPM)	Behavioral intention
43 – Uppal et al. (2026)	N/A	N/A	OTT / video streaming	Analytical / game-theoretic model	N/A	Economic / utility-based analytical foundation	Simulated / model-predicted behavior
42 – Sarraf and Kar (2026)	India–Australia	2018–2023 reviews; survey period NR	OTT / video streaming	Mixed methods; LDA + fsQCA	7,321 IMDb reviews + N = 706 survey respondents	Theory of Consumption Values + Complexity Theory	Mixed behavior types
6 – Shim et al. (2025)	South Korea	2022	Multi-category digital subscriptions	Secondary-data quantitative analysis; multivariate probit + latent class models	N = 2,595	No explicit formal theoretical framework	Self-reported current behavior
21 – Tsai (2023)	Taiwan	2020–2021	OTT / video streaming	Two-stage survey study; PLS-SEM / PLS-MGA + follow-up triangulation	Main N = 446; follow-up N = 121	Push–Pull–Mooring (PPM)	Behavioral intention
23 – Meier et al. (2026)	United States	NR	OTT / video streaming	Mixed methods; qualitative interviews + fsQCA	44 interviews + N = 224 survey respondents	Expectation Disconfirmation Theory (EDT)	Behavioral intention
7 – Kim et al. (2025)	South Korea	Sep 2023	OTT / video streaming	Cross-sectional survey; hierarchical regression	N = 813 (708 premium subscribers; 105 non-subscribers)	Uses and Gratifications + motivation-based perspective	Behavioral intention
24 – Mohan and Jadhav (2022)	NR	NR	OTT / video streaming	Predictive / machine-learning analysis using primary survey data	N = 294	No explicit formal theoretical framework	Behavioral intention
41 – Budzinski	N/A	N/A	Football / sports streaming	Conceptual / policy analysis	N/A	No explicit formal	Conceptual / policy analysis

et al. (2019)						theoretical framework	
30 – Kim et al. (2021)	South Korea	Jun–Jul 2019	Pay-TV–OTT bundles	Discrete choice experiment; mixed logit	N = 665	No explicit formal theoretical framework	Hypothetical choice / stated preference
39 – Wu et al. (2024)	N/A	N/A	Subscription sharing	Analytical / game-theoretic model	N/A	Economic / utility-based analytical foundation	Simulated / model-predicted behavior
20 – Park et al. (2026)	Australia	Feb 2024	Digital news bundles	Choice-based conjoint experiment; Hierarchical Bayes estimation	N = 2,125	Neoclassical / microeconomic media-economics approach	Hypothetical choice / stated preference

Note: Study numbers refer to internal IDs assigned during the review process, NR = not reported; N/A = not applicable; OTT = over-the-top; PPM = Push–Pull–Mooring; EDT = Expectation Disconfirmation Theory; fsQCA = fuzzy-set qualitative comparative analysis; LDA = latent Dirichlet allocation.

Geographically, the evidence base is concentrated in South Korea which accounts for four studies followed by Taiwan with two. Additional empirical evidence comes from the United States, Australia, and one cross-country India–Australia study, while the geographic location of respondents was not reported in one study. Three non-empirical studies did not involve original country-specific consumer samples. The service-context distribution is even more concentrated: seven of the 13 studies focus on OTT/video streaming, two examine pay-TV–OTT bundles, and the remaining contexts; digital news bundles, multi-category digital subscriptions, subscription sharing, and football/sports streaming are each represented by a single study (Figure 2).

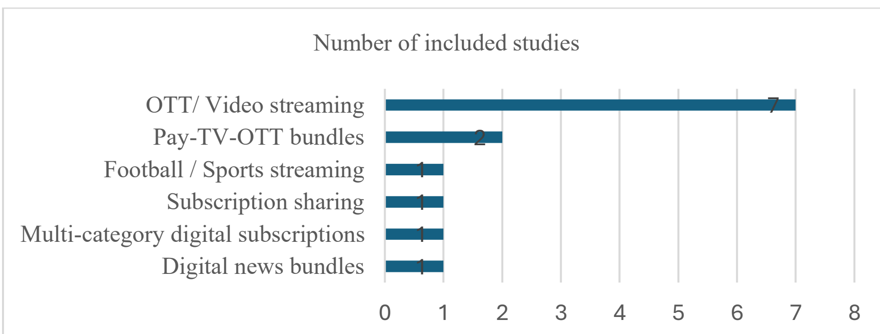

Figure 2. Distribution of Included Studies by Subscription / Service Context

Methodologically, cross-sectional quantitative surveys and discrete choice/conjoint studies are the two most common empirical designs, with three studies in each category. Two studies use mixed-method approaches, while secondary-data quantitative analysis and predictive/machine-learning analysis using primary survey data are each represented once. The empirical evidence is complemented by two analytical/game-theoretic studies and one conceptual/policy analysis. Behavioral evidence is more concentrated: five studies examine behavioral intention and three use hypothetical choice or stated preference. Two studies rely on simulated or model-predicted behavior, one combines multiple behavior types, and one examines self-reported current behavior. No included study is classified as using actual observed subscription behavior as its primary behavioral evidence. Also, the theoretical base is heterogeneous in which six studies employ explicit formal theories or frameworks, three draw primarily on economic or utility-based theoretical or analytical foundations, and four specify no explicit formal theoretical framework. No single theoretical framework dominates the corpus; the Push–Pull–Mooring framework is the only named framework represented in more than one included study. Additionally, the included literature is also relatively recent, in which publication years range from 2019 to 2026, with 10 of the 13 studies published from 2023 onward (Figure 3). Reported data-collection periods extend from 2018 to 2024, although the earliest period refers to IMDb review data rather than conventional survey collection, and several studies do not report exact collection dates.

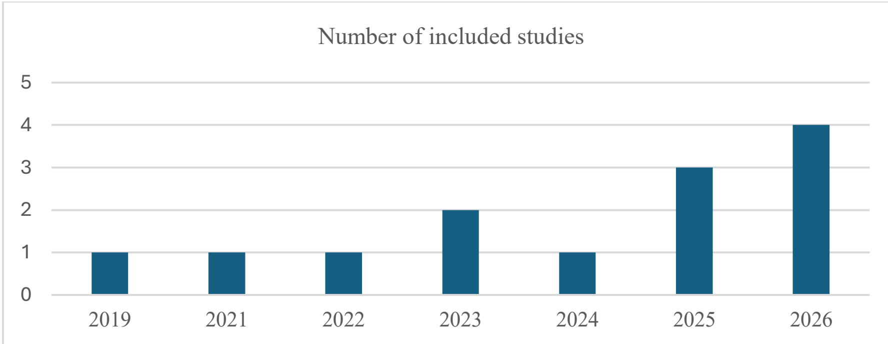

Figure 3. Distribution of included studies by publication year

Empirical sample sizes vary substantially across the included studies, ranging from small qualitative phases to large quantitative samples. Several studies use multi-phase or multi-source designs, including combinations of interviews, surveys, online reviews, and follow-up samples. These components were therefore retained separately rather than pooled into a single comparable sample statistic. Overall, the evidence base is geographically concentrated in East Asia, contextually centered on OTT/video streaming, methodologically diverse, and behaviorally weighted toward intentions, stated preferences, and model-derived outcomes.

4.2. Synthesis across the four dimensions of digital subscription portfolio management

The included studies were synthesized using four predefined dimensions of digital subscription portfolio management: accumulation, evaluation, strain, and adjustment. As shown in Table 3, the dimensions are represented unevenly across the 13 included studies, with substantial overlap between dimensions. The coding distinguishes between Primary evidence, where a dimension constitutes a central element of the study, Secondary evidence, where it is analytically relevant but non-central, and not present, where the dimension was not directly examined.

Table 3. Study-Level Coding Across the Four Portfolio-Management Dimensions

Study ID	Accumulation	Evaluation	Strain	Adjustment
37 – Kim & Kim (2024)	Secondary	Primary	Secondary	Primary
18 – Chang and Chiu (2023)	Not present	Primary	Secondary	Primary
43 – Uppal et al. (2026)	Primary	Secondary	Secondary	Secondary
42 – Sarraf and Kar (2026)	Primary	Primary	Secondary	Not present
6 – Shim et al. (2025)	Primary	Not present	Not present	Not present
21 – Tsai (2023)	Not present	Secondary	Not present	Primary
23 – Meier et al. (2026)	Primary	Primary	Secondary	Primary
7 – Kim et al. (2025)	Not present	Primary	Not present	Primary
24 – Mohan and Jadhav (2022)	Secondary	Secondary	Not present	Primary
41 – Budzinski et al. (2019)	Primary	Secondary	Primary	Secondary
30 – Kim et al. (2021)	Primary	Primary	Not present	Secondary
39 – Wu et al. (2026)	Not present	Secondary	Secondary	Primary
20 – Park et al. (2026)	Primary	Primary	Secondary	Secondary

Note: Primary indicates that the dimension was directly examined as a central element of the study; Secondary indicates analytically relevant but non-central examination; Not present indicates that the dimension was not directly examined and should not be interpreted as evidence of absence.

Portfolio Evaluation has the broadest direct representation in the corpus, appearing as a Primary dimension in seven studies and as a Secondary dimension in five, resulting in direct representation in 12 of the 13 studies. Adjustment follows closely, with seven Primary and four Secondary codings across 11 studies. Accumulation is directly represented in nine studies, including seven Primary and two Secondary codings. Strain displays a markedly different profile: although it is directly represented in eight studies, only one study examines it as a Primary dimension, while seven treat it as Secondary. Figure 4 summarizes this distribution.

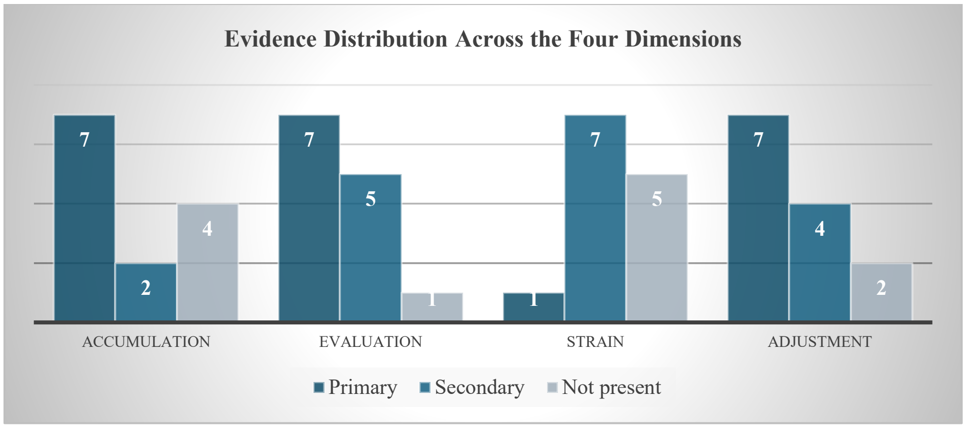

Figure 4. Distribution of primary, secondary and not-present coding across the four portfolio-management dimensions

4.2.1. Accumulation

Portfolio Accumulation is represented through several forms of concurrent or multi-service subscription holding. Recurring manifestations include multihoming, bundled multi-service configurations, and the simultaneous maintenance of more than one digital subscription. Multihoming appears in alliance-based OTT settings, culturally differentiated subscription portfolios, cross-category subscription use, and fragmentation-driven multiple-subscription arrangements. Bundling represents a second recurring form of accumulation, particularly in pay-TV–OTT and digital news contexts. Partial switching also contributes to accumulation where consumers retain an incumbent service while adding or maintaining an alternative subscription. More specific forms include complementary cross-category accumulation and forced multihoming arising from fragmented content rights. Overall, accumulation is concentrated primarily in OTT, streaming, and bundled subscription settings.

4.2.2. Evaluation

Portfolio Evaluation is the most broadly represented dimension in the corpus. The reviewed studies assess portfolios and subscription configurations through several distinct evaluative mechanisms. Recurring patterns include comparisons between incumbent and alternative services, switching costs, price and affordability, willingness to pay, service and content attributes, exclusiveness, and availability. Other studies emphasize broader value configurations, including functional, social, experiential, and epistemic value, while analytical work considers the marginal utility of maintaining a second subscription. Convenience, enjoyment, and one-stop access also appear as evaluative considerations in selected studies. Importantly, these constructs represent different forms of evaluation rather than a single unified value construct, and the evidence does not support treating them as interchangeable.

4.2.3. Strain

Portfolio Strain is comparatively less developed as a primary focus of literature. Only one study examines strain as a Primary dimension, whereas seven studies represent it as Secondary and five do not directly examine it. The forms of strain identified across the corpus are heterogeneous, they include transaction, financial, and access burdens associated with fragmented subscription environments; management, cognitive, coordination, and privacy-related burdens; switching costs and lock-in-related frictions; affordability constraints; and subscription fatigue framed as portfolio–value misfit. The evidence also differs substantially in strength, where some burdens are conceptually argued or model-derived, while others are empirically tested or interpreted as secondary mechanisms. For example, Study 37 identifies switching costs and contractual or lock-in-related restrictions, whereas Study 18 links switching costs with habit-based lock-in. Subscription fatigue is represented as a portfolio–value misfit in Study 42 but is not directly measured as an outcome or predictor. Thus, the corpus supports describing Strain as comparatively underexamined, rather than absent.

4.2.4. Adjustment

Portfolio Adjustment is broadly represented and extends beyond conventional switching or churn. Recurring forms include provider switching, complete switching, churn, and retention but the literature also examines partial switching, free-to-paid transition, movement from premium to ad-supported plans, subscription sharing, and changes in bundle or subscription configurations. Partial switching is particularly relevant to portfolio management where it involves retaining the incumbent service while adding an alternative, thereby modifying rather than replacing the existing portfolio. Other adjustment mechanisms include adding a second allied OTT service, moving to a shared subscription arrangement, and rebundling digital services. The underlying evidence ranges from behavioral intentions and hypothetical choices to empirically estimated and model-derived decisions, therefore adjustment intentions should not be interpreted as observed consumer behavior.

4.2.5. Cross-dimensional synthesis

Cross-dimensional synthesis indicates that the four dimensions are analytically distinct but frequently interconnected. The strongest recurring linkage is between Evaluation and Adjustment where service value, alternative attractiveness, switching costs, affordability, content, plan attributes, and willingness to pay are explicitly embedded within switching, retention, churn, sharing, or bundle-configuration decisions. Accumulation and Evaluation are also linked where the value, utility, affordability, or content attributes of multi-service configurations influence multihoming or bundle choices. Accumulation–Adjustment linkages emerge where portfolio change involves adding a second service, partial switching with concurrent holding, rebundling, or managing fragmented subscriptions. Strain–Adjustment relationships are evident where switching costs, lock-in-related frictions, affordability, management costs, privacy and coordination burdens, or fragmentation are explicitly connected with portfolio modification. Evidence also links Accumulation with Strain and Evaluation with Strain in selected studies, although these relationships are narrower and include a mix of empirical, model-derived, and conceptual evidence. These relationships should be interpreted as descriptive cross-study linkages rather than as a sequential or causal process.

Taking together, the evidence supports Accumulation, Evaluation, Strain, and Adjustment as a useful organizing framework for digital subscription portfolio management. The dimensions capture distinct but overlapping aspects of how subscription portfolios are formed, assessed, experienced, and modified. Ten of the 13 studies directly represent at least three dimensions, while 12 represent at least two, demonstrating substantial multidimensional overlap. Nevertheless, the distribution is uneven: Evaluation and Adjustment are most broadly represented, Accumulation is substantial but more contextually concentrated, and Strain remains comparatively weak as a Primary focus. Importantly, the reviewed evidence does not establish a sequential Accumulation → Evaluation → Strain → Adjustment process, nor does it support a unified causal chain across the four dimensions. The framework should therefore be interpreted as an organizing structure for literature rather than a validated process model.

4.3. Portfolio contexts, mechanisms, and consumer decisions

The synthesis indicates that digital subscription portfolio management is better understood as a set of context-dependent configuration problems than as a single switching process. Across the included studies, portfolio behavior varies according to the subscription context, the relationship among services, the mechanism through which the portfolio is structured or modified, and the resulting consumer decision. Table 4 integrates these elements into a portfolio typology.

Table 4. Integrated Typology of Digital Subscription Portfolio Contexts, Mechanisms, and Consumer Decisions

Portfolio Context	Service Relationship	Portfolio Mechanism	Consumer Decision	Supporting Studies
Bundled multi-service configuration	Bundled	Bundling	Choose between bundled subscription configurations	Studies 37, 30, 20
Incumbent-alternative provider context	Incumbent vs alternative	Provider switching	Switch provider or retain incumbent	Studies 18, 37
Incumbent-alternative provider context	Incumbent vs alternative	Complete switching	Replace the incumbent service	Study 23
Incumbent-alternative provider context	Incumbent vs alternative	Partial switching	Retain incumbent and add a second service	Study 23
Simultaneous multi-service holding/ multihoming	Not explicitly classified	Multihoming	Intention to continue multihoming / maintain a multi-subscription portfolio	Study 42
Cross-category current subscription context	Complementary and substitutive patterns	Concurrent cross-category subscriptions	Current configuration observed; no prospective portfolio-change decision	Study 6
Single vs. multihoming choice	Allied / integrated	Alliance-facilitated multihoming	Subscribe to two allied services	Study 43
Access-tier transition	Free vs paid	Free to paid transition	Switch/ adopt paid access	Study 21
Access-tier transition	Premium vs ad-supported	Ad-supported transition	Move to an ad-supported plan	Study 7

Primary-platform churn within multi-subscription context	Not explicitly classified	Mechanism not explicitly specified; multi-subscription status and switching frequency used as churn predictors	Planned churn/switching of primary OTT platform while multiple subscriptions are present	Study 24
Fragmentation / forced multihoming	Fragmented across providers	Fragmentation-driven multiple subscriptions	Forced multihoming / hold multiple subscriptions	Study 41
Shared vs. individual access	Shared vs individual	Subscription sharing	Choose or move to shared access	Study 39

4.3.1. Portfolio contexts

The most clearly recurring context is the bundled multi-service configuration, in which consumers compare or select packages combining pay-TV, OTT, news, or other digital content (Studies 37, 30, and 20). A second recurring context is the incumbent–alternative provider setting, where consumers consider whether to remain with the incumbent, move to an alternative, or modify the existing configuration (Studies 18 and 23). Simultaneous multi-service holding also recurs, although the underlying evidence differs: Study 42 examines intention to continue multihoming, whereas Study 6 observes current cross-category subscription configurations without identifying a prospective portfolio-change decision. Other contexts are more study-specific, including single-versus-multihoming choice, access-tier transitions, primary-platform churn within a multi-subscription context, fragmentation-driven multihoming, and shared-versus-individual access.

4.3.2. Portfolio mechanisms

The mechanisms through which portfolios are structured or modified are similarly diverse. Bundling is the clearest recurring mechanism, but its associated decisions vary across studies. Consumers may compare providers within bundled pay-TV–OTT configurations, select among zero, one, or two OTT services in a hypothetical bundle, or choose news packages containing additional digital content. Thus, bundling describes how the portfolio is organized rather than a single decision outcome. To add more, provider switching represents another recurring mechanism, but the evidence distinguishes among retention, complete replacement, and portfolio expansion. In Study 23, complete switching replaces the incumbent service, whereas partial switching retains the incumbent while adding an alternative. Partial switching is therefore a portfolio-expanding decision rather than simply a weaker form of replacement. Also, multihoming and multiple-service holding encompass several distinct mechanisms. Study 42 concerns intended continuation of multihoming, Study 6 documents current cross-category combinations, Study 43 models alliance-facilitated addition of a second OTT service, and Study 41 describes fragmentation-driven forced multihoming. Study 24 differs from these mechanisms: it uses multiple-subscription status and switching frequency as predictors of planned churn of the primary platform but does not establish how the portfolio is constructed or maintained.

4.3.3. Consumer decisions

The resulting consumer decisions extend well beyond generic switching. The corpus includes retention of an incumbent service, complete replacement, partial switching with concurrent holding, continuation of multihoming, bundled configuration choice, free-to-paid transition, premium-to-ad-supported transition, shared-access choice, forced multihoming, and planned churn of a primary platform within a multi-subscription context. Importantly, the underlying evidence types differ: some decisions are behavioral intentions, some are hypothetical or model-derived choices, and others reflect current configurations rather than prospective change. These forms should therefore not be interpreted as equivalent observed behaviors.

4.3.4. Service relationships

Service relationships further differentiate portfolio configurations. Bundled services are explicitly integrated within a package, while incumbent–alternative relationships structure switching and retention decisions. Some studies identify complementary or substitutive relationships across service categories, whereas alliance-based settings facilitate multihoming between integrated services. Other contexts involve free-versus-paid or premium-versus-ad-supported access, shared-versus-individual plans, or fragmented services distributed across providers. Where the extraction does not explicitly classify the relationship among services, no such relationship is inferred. Figure 5 summarized the analytical relationship among portfolio context, service relationship, mechanism, and consumer decision.

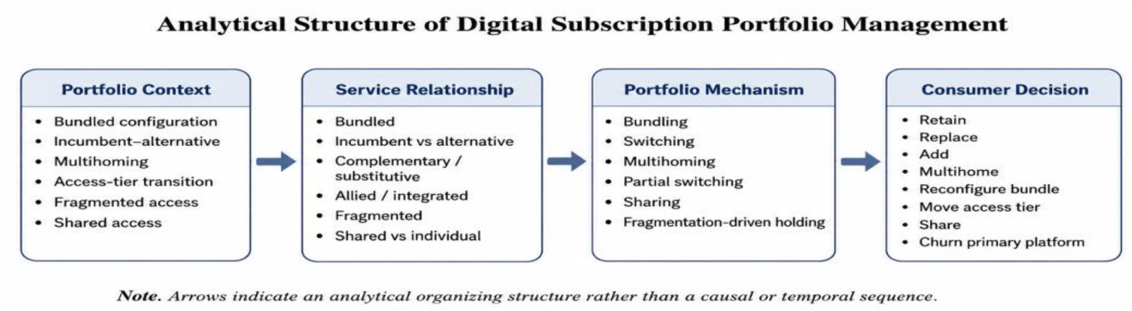

Figure 5. Analytical structure of digital subscription portfolio management

4.3.5. Recurring portfolio pathways

Several recurring descriptive pathways emerge from the integrated typology. Bundled configurations recur through bundled service relationships and bundling mechanisms to bundle-composition or package-selection decisions. Incumbent–alternative contexts recur across switching-related studies but branch into retention, provider switching, complete replacement, or portfolio expansion. A broader multiple-service context also recurs, but its meaning differs across studies: it may represent intention to maintain multihoming, current cross-category holding, alliance-facilitated addition, structural compulsion through fragmented access, or a context within which planned churn of the primary platform is examined. Access-tier transitions form a narrower recurring pathway because the included studies move in different directions between free, paid, premium, and ad-supported access. Fragmentation-driven holding and subscription sharing remain study-specific in the current corpus.

4.3.6. What constitutes a portfolio-level decision?

Taken together, the synthesis suggests that a portfolio-level subscription decision is characterized by explicit consideration of the configuration or relationship among multiple services, rather than by the mere existence of a subscription. Portfolio-level decisions may involve maintaining multiple services, adding an alternative while retaining an incumbent, selecting among bundle compositions, managing fragmented access across providers, or choosing shared access arrangements. By contrast, an isolated plan change should not automatically be classified as portfolio-level if the extracted evidence does not establish a multi-service or inter-service configuration. Studies 21 and 7 therefore remain adjacent access-tier cases rather than direct evidence of simultaneous multi-subscription portfolio management.

Overall, the evidence indicates that digital subscription portfolio management cannot be reduced to a single switching process. Similar mechanisms may generate different decisions, while similar portfolio states may arise through different mechanisms. Bundling may lead to provider choice or bundle composition; incumbent–alternative comparison may result in retention, replacement, or portfolio expansion; and multiple-subscription holding may reflect voluntary continuation, addition, structural fragmentation, or simply the context within which primary-platform churn is examined. The review therefore distinguishes context, service relationship, mechanism, and decision as separate analytical components and treats the identified pathways as descriptive rather than causal or temporal sequences.

4.4. Cost-value trade-offs and sources of portfolio strain

The synthesis indicates that cost–value reasoning is more developed in the literature than direct portfolio-strain measurement. Across the included studies, consumers are repeatedly positioned as balancing the benefits of broader access, alternative services, richer content, convenience, or shared access against monetary, switching, management, fragmentation, or transaction-related burdens. However, these tensions do not always constitute portfolio strain. Several studies examine cost–value trade-offs without directly measuring strain, while strain itself is more often treated as a secondary consideration than as a central outcome.

Table 5. Main Cost-Value Trade-offs and Sources of Portfolio Strain

Cost-Value Trade-off/ Tension	Main Cost or Burden	Main Value or Benefit	Associated Strain Source	Supporting Studies
Alternative service/ content value vs switching, lock-in, or exclusivity friction	Switching costs, contractual or habit-based lock-in, incumbent exclusivity	Alternative-provider benefits, content, flexibility	Switching and lock-in friction	37, 18, 23
Richer portfolio/ access vs price or affordability	Higher price, affordability constraints, discount/ payment requirements	Additional content, second-subscription utility, quality, novelty, convenience	Affordability / financial constraints	43, 42, 23, 30, 20
Lower-cost/ free access vs advertising or paid-quality benefits	Advertising exposure or cost of paid/ ad-free access	Free access, convenience, ad-free use, quality, richer content	No direct strain established	21, 7
One-stop/ comprehensive access vs fragmentation and transaction burden	Separate payments, fragmented access, transaction costs	Comprehensive access, one-stop convenience	Fragmentation / loss of one-stop access	41, 20
Shared-access savings vs privacy/ coordination/ transition cost	Privacy risk, search, learning, coordination, and transition costs/ transaction	Lower effective cost, shared-access savings	Privacy, coordination, and transaction/ transition burden	39

Note: A cost–value trade-off is reported only where both a cost/burden side and a value/benefit side are explicitly represented in the extracted evidence. Advertising exposure and generic price differences are not treated as portfolio strain unless an explicit strain linkage is present.

Two recurring cost–value tensions dominate the corpus. The first concerns the value of alternative services or content relative to switching, lock-in, or exclusivity friction. Studies 37, 18, and 23 show that alternative-service attractiveness, switching flexibility, or additional content can be offset by switching costs, contractual or habit-based lock-in, or the loss of incumbent exclusive content. The second recurring tension concerns richer portfolio access relative to price, affordability, discount requirements, or payment terms. Across Studies 43, 42, 23, 30, and 20, broader access and portfolio value are associated with benefits such as additional content, second-subscription utility, convenience, novelty, and bundled value, but these benefits are evaluated alongside higher prices, affordability constraints, required discounts, or payment conditions. These patterns occur across multiple contexts, although the underlying constructs and evidence types differ and should not be interpreted as a common causal relationship.

4.4.1. Sources of portfolio strain

The sources of portfolio strain are narrower and more fragmented than the cost–value trade-offs. Two recurring strain clusters can be identified. First, switching and lock-in friction recur in studies 37 and 18, where switching costs, contractual restrictions, and habit make provider or configuration change more difficult. Second, fragmentation and loss of one-stop access recur in studies 41 and 20, although the strength of evidence differs: Study 41 treats transaction costs, multiple subscriptions, and loss of one-stop shopping as Primary Strain in a conceptual/policy analysis, whereas Study 20 treats one-stop bundled access as a Secondary strain-related consideration.

Other strain sources are study-specific, for example study 43 identifies time, psychological, management, and attention burdens associated with managing content across separate services. Study 42 interprets subscription fatigue as a portfolio–value misfit rather than directly measuring fatigue. Study 23 identifies affordability as a constraint on maintaining multiple services or engaging in complete or partial switching, while Study 39 models' privacy, search, learning, coordination, and transaction burdens in shared-access arrangements. These patterns should therefore not be generalized beyond the context in which they are directly supported.

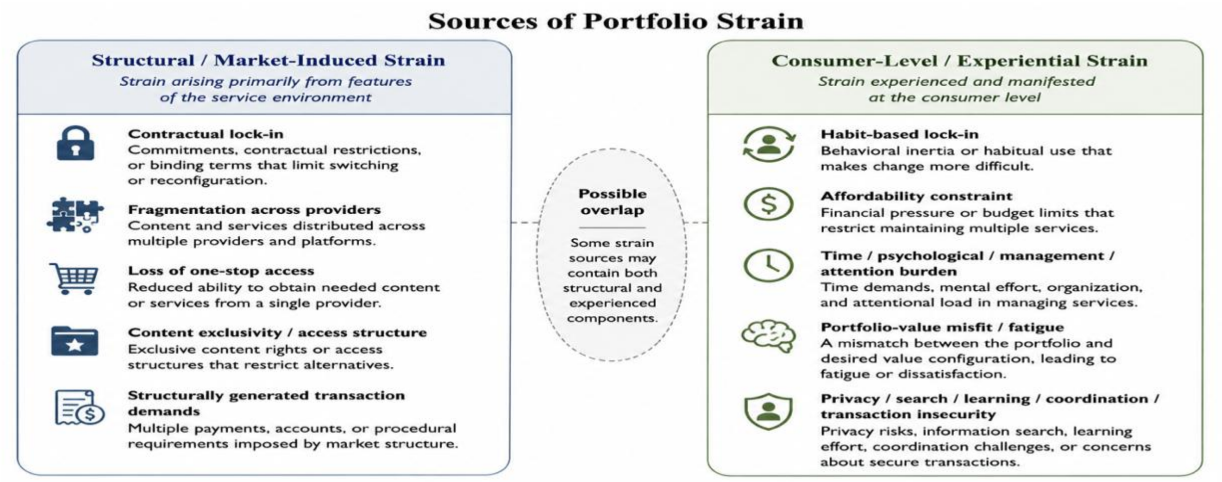

Figure 6. Structural and consumer-level sources of portfolio strain. Note: Some strain sources may contain both structural and experienced components; the classification reflects their dominant characterization in the extracted evidence.

As seen in figure 6, the extracted evidence supports a cautious distinction between structural or market-induced strain and consumer-level or experiential strain. Structural strain is primarily associated with features of the service environment, including contractual lock-in, fragmented provision, loss of one-stop access, content exclusivity, and structurally generated transaction demands. Consumer-level strain is reflected in habit-based lock-in, affordability constraints, management and attention burdens, portfolio–value misfit, and privacy or coordination concerns. These categories should not be treated as mutually exclusive, because some strain sources contain both structural and experienced components; the classification reflects their dominant characterization in the available evidence.

4.4.2. Cost-value considerations that do not constitute portfolio strain

Lower-cost or ad-supported access represents a recurring cost–value tension, but it should not automatically be interpreted as portfolio strain. Studies 21 and 7 compare lower-cost or free access with advertising exposure or paid-quality benefits, yet Portfolio Strain is coded as Not present in both studies. Similarly, generic price sensitivity or discount requirements are not sufficient to establish strain without an explicit portfolio-level burden. This distinction prevents ordinary price or plan evaluation from being conflated with portfolio strain.

4.4.3. Underdevelopment of portfolio strain

Overall, the evidence base remains limited as a dedicated portfolio-strain literature. Only one study treats Strain as a Primary dimension, while seven treat it as Secondary and five do not directly examine it. Accordingly, strain is more often embedded within studies of switching, multihoming, bundling, sharing, or access arrangements than investigated as a central outcome in its own right. Cognitive and management burdens are represented in only a small number of studies, and portfolio fatigue is not directly measured. The current evidence therefore supports stronger conclusions about cost–value trade-offs than about direct fatigue, generalized financial burden, or causal trade-off–strain processes.

4.5. Explanatory mchanisms and consumer consequences

The synthesis does not support a single dominant explanation of consumer management of digital subscription portfolios. Instead, the evidence shows selective convergence around a limited number of recurring explanatory mechanisms, alongside substantial theoretical and mechanism-level fragmentation. The most recurrent explanations concern switching and lock-in, attractiveness and mooring, and bundling utility or one-stop access, while other mechanisms remain study-specific. Consumer consequences also vary considerably and should be distinguished from the immediate decisions that the explanatory mechanisms help to explain.

Table 6. Explanatory Mechanisms and Associated Consumer Outcomes Across the Included Studies

Explanatory Mechanism	Main Decision Outcome	Broader Consumer Consequence	Supporting Studies	Evidence Type
Switching costs, lock-in, attractiveness, and mooring	Switching, retention, or transition intention	Reduced switching flexibility / lock-in	37, 18, 21	Hypothetical / behavioral intention
Alliance-reduced friction and multihoming utility	Addition or maintenance of a second subscription	Higher modeled utility, consumer surplus, reduced management burden	43	Model-derived
Value configuration and cultural portfolio curation	Intention to continue multihoming	Portfolio-value alignment; possible fatigue/value misfit	42	Mixed current/intention and conceptual interpretation
Complementarity and substitution in co-subscription demand	Current multi-subscription configuration	No direct downstream consequence explicitly identified	6	Current self-reported behavior
Expectation disconfirmation, satisfaction, affordability, and content exclusivity	Complete or partial switching	Access to both services, incumbent retention/ lock-in, affordability constraint	23	Behavioral intention/ empirically tested configurations
Motivation-based plan evaluation	Transition to ad-supported access	No direct downstream consequence explicitly identified	7	Behavioral intention
Multiple-subscription status and switching-frequency prediction	Planned primary platform churn	Higher predicted churn risk	24	Predictive empirical/ behavioral intention
Fragmentation-induced access pressure	Forced multiple subscriptions	Higher expenditure, transition costs, loss of one-stop access	41	Conceptual / policy
Bundling utility and one stop access	Bundle selection / configuration choice	Convenience, joint content access, perceived value, discount expectations	30, 20	Hypothetical/ stated preference
Sharing costs and market-expansion mechanisms	Shared-plan choice / access expansion	Consumer-surplus variation, lower-shared access attractiveness under transition costs	39	Model-derived

Note: Decision outcomes and broader consumer consequences are treated as analytically distinct. Intention, hypothetical choice, model-derived outcomes, current behavior, and conceptual evidence are not interpreted as equivalent forms of observed consumer behavior.

Two explanatory mechanisms occur across more than one study as seen in table 6. The first concerns switching costs, lock-in, attractiveness, and mooring. Studies 37, 18, and 21 examine movement between incumbent and alternative services through different theoretical routes, including reference dependence and loss aversion, Push–Pull–Mooring mechanisms, alternative attractiveness, switching costs, and habit. Although grouped for cross-study comparison, these mechanisms should not be treated as theoretically equivalent. The second one concerns bundling utility and one-stop access. Studies 30 and 20 associate bundled configurations with utility, content access, convenience, perceived value, and discount-related evaluation. Beyond these clusters most explanatory mechanisms remain study-specific.

4.5.1. Explanatory diversity and theoretical fragmentation

The explanatory structure of the literature is highly heterogeneous. Explicit theoretical approaches include Reference-Dependent Preferences and Loss Aversion, Push–Pull–Mooring, Expectation Disconfirmation Theory, the Theory of Consumption Values and Complexity Theory, and Uses and Gratifications or motivation-based perspectives. Other studies rely on utility or economic modeling, predictive empirical analysis, or conceptual policy reasoning. The evidence therefore indicates theoretical fragmentation with selective convergence rather than consolidation around a dominant framework. The recurrence of similar behavioral outcomes across different theoretical routes further supports this interpretation.

4.5.2. Decision outcomes versus broader consumer consequences

The synthesis distinguishes immediate decision outcomes from broader consumer consequences. Decision outcomes include switching, retention, transition, churn, multihoming, bundle selection, and shared-plan choice. Broader consequences include reduced switching flexibility or lock-in, consumer surplus and utility, convenience and reduced management burden, content access and perceived value, affordability pressure, portfolio-value misfit, and privacy or coordination burdens. This distinction is important because a decision such as switching or multihoming is not conceptually equivalent to the subsequent effects experienced by consumers. The broader consequences are heterogeneous in both direction and evidence type. Some are economic, such as modeled consumer surplus or expenditure; others are experiential, including convenience, management burden, or fatigue-related interpretations; and others concern access, flexibility, or perceived value. The evidence does not support collapsing these outcomes into a single positive–negative consequence continuum.

4.5.3. Recurring mechanism–consequence patterns

Several descriptive mechanisms–consequence patterns recur across studies. Switching, attractiveness, and mooring mechanisms correspond with reduced switching flexibility, retention intention, or switching intention across Studies 37, 18, and 21. Bundling utility corresponds with joint or broader content access, perceived value, convenience, and discount expectations in Studies 30 and 20. A broader multihoming-related pattern links alliance-reduced friction in Study 43 with value configuration in Study 42, although the former is model-derived while the latter combines active multihoming status, behavioral intention, and conceptual interpretation. These relationships should therefore be treated as comparative explanatory patterns rather than causal chains.

4.5.4. Different routes to similar outcomes

Similar consumer outcomes are associated with different explanatory routes. Switching or transition intention is examined through PPM attractiveness and mooring, reference dependence and loss aversion, expectation disconfirmation and content constraints, and motivation-based evaluation. Likewise, multihoming or multiple-service holding is associated with alliance-reduced friction, culturally configured value alignment, complementarity in current co-subscription patterns, or structural fragmentation. Convenience and access benefits also arise through different mechanisms, including bundling, alliance integration, and shared access. These contrasts indicate that similar portfolio outcomes should not be assumed to reflect a common underlying mechanism.

4.5.5. Limits of the consumer-consequence evidence

The evidence is more developed for explaining adjustment decisions or intentions than for establishing broader consumer consequences. Several studies identify switching, retention, multihoming, bundle selection, or churn outcomes without specifying additional downstream portfolio-level consequences. Moreover, the corpus relies more heavily on behavioral intentions, model-derived outcomes, and hypothetical or stated-preference evidence than on observed current behavior. Consequently, the literature provides a relatively rich explanation of why consumers may modify subscription configurations, but a less developed account of the longer-term experiential, financial, and welfare consequences of portfolio management. Overall, the evidence supports a plural explanatory architecture characterized by theoretical fragmentation, selective cross-study convergence, and substantial variation in both mechanisms and consequences.

4.6. Managerial and policy implications

Managerial implications are more prevalent than policy implications across the included studies and are concentrated primarily around provider-facing decisions. The most recurring themes concern retention and switching management, pricing and access tiers, bundling and package design, and content, convenience, or portfolio fit. Policy implications are less common and more heterogeneous, focusing mainly on competition, access, alliances, exclusivity, consumer protection, and platform governance.

Table 7. Summary of managerial and policy implication families

Implication family	Main practical focus	Supporting studies
Retention, switching, and churn management	Monitor switching/ retention drivers, churn indicators, loyalty, habit, portfolio status, and predictive signals	18, 21, 23, 24
Pricing and access-tier management	Discounts, dynamic pricing, favorable plans, tiered access, affordability-sensitive offers	20, 21, 23, 30, 37, 39
Bundling and package design	Complementary bundles, alliances, partnerships, package composition, cross-service access	6, 20, 30, 43
Content, convenience, and portfolio-fit design	Content quality, personalization, recommendations, convenience, portfolio-fit, audience-specific communication	7, 21, 23, 42
Policy and regulatory considerations	Competition, access, alliances, exclusivity, bundling regulation, privacy and algorithmic accountability	30, 37, 41, 42, 43

Note: Review-level implication families were retained only where multiple author-reported implications supported a common practical theme. Study-specific implications were not generalized.

4.6.1. Managerial Implications

Retention, switching, and churn management form one recurring practical priority. Across Studies 18, 21, 23, and 24, the author-reported implications emphasize monitoring switching and retention drivers, loyalty and habit, multiple-subscription status, switching frequency, and churn-related indicators to support retention-oriented strategies. These recommendations vary on an evidential basis: Study 24 is predictive rather than causal, and the corpus does not establish a common intervention effect. Pricing and access-tier management also recur across several contexts through favorable plans, discounts, dynamic pricing, affordability-sensitive offers, and tiered or differentiated access. A second group of implications concerns portfolio and package design. Studies 6, 20, 30, and 43 emphasize complementary bundling, alliances, strategic partnerships, package composition, and cross-service access as ways of improving perceived portfolio value or convenience. Related service-design implications include content quality, personalized recommendations, portfolio diagnostics, portfolio fit, and audience-specific communication. These themes recur across the corpus, although the underlying evidence ranges from current subscription patterns to hypothetical choice and model-derived analysis.

4.6.2. Policy implications

Policy implications are comparatively sparse and do not point to a single regulatory direction. They include domestic-platform development, support for alliances that facilitate multihoming, restrictions on broadcasting exclusivity, third-party program-guide access, flexible bundling regulation conditional on competition and consumer welfare, and culturally sensitive or privacy-conscious platform design. Because these implications arise from heterogeneous empirical, model-derived, hypothetical, and conceptual/policy evidence, they should be interpreted as context-specific recommendations rather than a common policy consensus. Overall, practical literature is more developed in provider retention, pricing, package design, and content strategy than in unified portfolio-level guidance. Explicit portfolio-management implications are present, particularly in studies of bundling, multihoming, sharing, and portfolio fit, but they remain fragmented across contexts and evidence types.

5. DISCUSSION AND FUTURE RESEARCH DIRECTIONS

5.1. Interpretation of main findings

The findings suggest that digital subscription portfolio management cannot be fully explained through isolated constructs such as switching, churning, or continuance. Instead, the reviewed literature points to a broader configuration-based phenomenon in which consumers may simultaneously hold, evaluate, retain, add, replace, share, or restructure digital subscriptions. Multihoming and multiple-service holding are represented in Sarraf and Kar (2026), Uppal et al. (2026), Shim et al. (2025), and Budzinski et al. (2019), while different forms of switching, retention, and adjustment are examined by Chang and Chiu (2023), Meier et al. (2026), Tsai (2023), and Kim et al. (2025). The fact that 10 of the 13 included studies represented at least three dimensions and 12 represented at least two therefore indicates more than simple topical overlap; it suggests that subscription decisions are frequently embedded within broader portfolio configurations. However, this overlap should not be interpreted as evidence of a fixed Accumulation → Evaluation → Strain → Adjustment sequence or a common causal process across studies.

A particularly important implication is the strong evaluation orientation of literature. Consumers are repeatedly examined through assessments of switching costs and alternative attractiveness (Chang & Chiu, 2023; Kim & Kim, 2024), multidimensional value (Sarraf & Kar, 2026), affordability and content exclusiveness (Meier et al., 2026), willingness to pay and package attributes (Kim et al., 2021; Park et al., 2026), and the utility associated with maintaining additional subscriptions (Uppal et al., 2026). This concentration suggests that existing research has largely approached subscription management through a decision-calculus lens, emphasizing how consumers compare benefits, costs, alternatives, and service attributes. Yet the outcomes of these evaluations are more varied than simple service discontinuation. Meier et al. (2026) distinguish complete from partial switching, Tsai (2023) examined free-to-paid transition, Kim et al. (2025) examined movement toward ad-supported access, and Wu et al. (2026) modeled individual versus shared subscription arrangements. These forms of change imply that adjustment is better understood as portfolio reconfiguration, which may involve expansion, retention, substitution, sharing, or modification rather than cancellation alone.

The comparatively weak development of Strain reveals a different limitation in literature. Budzinski et al. (2019) is the only included study coded with Strain as a Primary dimension, focusing on burdens associated with fragmented access and the need for multiple subscriptions. Elsewhere, strain is represented indirectly through separate mechanisms: Kim and Kim (2024) examined switching and lock-in-related costs; Chang and Chiu (2023) identified habit-based and switching-related mooring effects; Meier et al. (2026) highlighted affordability constraints; Sarraf and Kar (2026) conceptualized subscription fatigue as portfolio–value misfit rather than directly measuring fatigue, and Wu et al. (2026) modeled privacy, coordination, transaction, and transition costs associated with shared subscription arrangements. The implication is therefore not that subscription strain is absent, but that it remains conceptually fragmented across different burden constructs rather than being examined as a coherent portfolio-level phenomenon. This interpretation must also be tempered by the methodological diversity of the corpus, which combines intentions, stated or hypothetical choices, predictive analyses, analytical models, current self-reported configurations, and conceptual or policy evidence. Consequently, the cross-study patterns identified here should not be interpreted as universal causal relationships or as direct evidence of realized consumer behavior.

5.2. Conceptual contribution

The main conceptual contribution of this review is to shift the analytical focus from isolated subscription decisions toward a broader digital subscription portfolio perspective. Existing studies tend to examine separate phenomena such as switching and retention (Chang & Chiu, 2023), multihoming (Sarraf & Kar, 2026; Uppal et al., 2026), bundling (Kim et al., 2021; Park et al., 2026), partial switching (Meier et al., 2026), churn (Mohan & Jadhav, 2022), subscription sharing (Wu et al., 2026), and fragmentation-driven multiple-subscription access (Budzinski et al., 2019). When viewed collectively, however, these streams describe different mechanisms through which consumers construct and manage configurations of digital services. The contribution of the portfolio perspective is therefore not to collapse these behaviors into a single construct, but to provide an integrative level of analysis through which their relationships and distinctions can be examined together.

A second contribution lies in organizing this fragmented evidence through the four dimensions of Accumulation, Evaluation, Strain, and Adjustment. Accumulation captures mechanisms such as multihoming, simultaneous holding, bundling, and partial switching (Meier et al., 2026; Sarraf & Kar, 2026; Shim et al., 2025; Uppal et al., 2026). Evaluation captures assessments of value, affordability, alternatives, switching costs, utility, content, and package attributes (Kim & Kim, 2024; Park et al., 2026; Sarraf & Kar, 2026; Uppal et al., 2026). Strain captures burdens associated with fragmentation, lock-in, affordability, coordination, privacy, and transaction-related frictions (Budzinski et al., 2019; Kim & Kim, 2024; Meier et al., 2026; Wu et al., 2026). Adjustment encompasses switching, retention, partial switching, access-tier transitions, churn, sharing, and configuration change (Chang & Chiu, 2023; Kim et al., 2025; Meier et al., 2026; Mohan & Jadhav, 2022; Tsai, 2023; Wu et al., 2026). The conceptual value of this structure lies in demonstrating how apparently separate behaviors can occupy overlapping positions within subscription management while retaining distinct mechanisms and outcomes. The framework therefore functions as an organizing device, not as a validated causal model or sequential consumer journey.

The review further refines the conceptual meaning of Adjustment and exposes the relative immaturity of Strain. Adjustment can involve expansion as well as reduction: Meier et al. (2026) showed that partial switching may involve retaining an incumbent while adding an alternative; Uppal et al. (2026) examined alliance-enabled multihoming that can facilitate access to an additional service; and Wu et al. (2026) showed how sharing can alter the subscription arrangement without necessarily eliminating access. By contrast, Strain remains dispersed across separate burden mechanisms. Budzinski et al. (2019) is the only study in which Strain is coded as a Primary dimension, while Chang and Chiu (2023), Kim and Kim (2024), Meier et al. (2026), Sarraf and Kar (2026), and Wu et al. (2026) captured specific elements such as switching frictions, affordability, management burden, portfolio–value misfit, privacy concerns, and coordination or transaction costs. This imbalance suggests that adjustment behavior has become comparatively differentiated in literature, whereas portfolio strain has yet to develop into a consistently conceptualized and directly measured construct.

5.3. Research gaps and future research directions

The review identifies four main areas in which literature remains insufficiently developed. First, the evidence base relies heavily on intentions, stated or hypothetical choices, cross-sectional surveys, and analytical models, limiting understanding of how subscription portfolios actually evolve over time. Chang and Chiu (2023), for example, explicitly called for longitudinal studies and long-term observation of user lifecycles, while Shim et al. (2025) identified their cross-sectional design as unable to capture dynamic changes in multi-subscription behavior. Sarraf and Kar (2026) similarly recommended complementing self-reported survey evidence with behavioral usage analytics. Future research should therefore follow consumers longitudinally and combine survey measures with behavioral tracking where possible. This would allow researchers to distinguish stated intentions from realized additions, cancellations, partial switches, cycling, sharing, and other portfolio adjustments.

Second, portfolio strain requires substantially stronger conceptualization and measurement. The current corpus identifies multiple burdens, but these remain distributed across switching costs, lock-in, affordability constraints, fragmentation, management burden, privacy concerns, coordination costs, and portfolio–value misfit rather than being integrated into a common portfolio-level construct. Budzinski et al. (2019) provided the clearest primary treatment of fragmentation-related burden, whereas Kim and Kim (2024), Meier et al. (2026), Sarraf and Kar (2026), and Wu et al. (2026) addressed more specific forms of friction. Future studies should therefore develop and validate multidimensional measures of subscription strain that distinguish, for example, financial, cognitive, management, access, privacy, and coordination burdens. Such work would also permit direct testing of when strain contributes to portfolio adjustment rather than inferring this relationship from separate constructs.

Third, the literature has limited cross-market and consumer-heterogeneity coverage. Several studies are concentrated in particular national settings, especially South Korea and Taiwan, and their authors explicitly caution against broad generalization. Chang and Chiu (2023) recommend cross-cultural and cross-regional comparison, Kim and Kim (2024) called for comparisons across countries and greater attention to demographic heterogeneity, and Meier et al. (2026) recommended replication outside the United States and further investigation of individual differences underlying partial and complete switching. Shim et al. (2025) likewise recommended cross-cultural comparisons and more detailed examination of the number of subscriptions consumers hold. Future portfolio research should therefore examine how income, age, household structure, culture, subscription intensity, service category, and other consumer characteristics shape different portfolio configurations and adjustment strategies.

Finally, future research should move from studying individual portfolio mechanisms in isolation toward more integrative models of portfolio management. Existing work separately explains multihoming, switching, bundles, sharing, cross-category subscriptions, and tier transitions, but relatively little research examines how these decisions interact within the same consumer portfolio. Shim et al. (2025), for example, noted that binary subscriber/non-subscriber measures do not fully capture the complexity of multi-subscription behavior and recommend directly accounting for the number of subscriptions held. Meier et al. (2026) demonstrate that complete and partial switching arises through different configurations and further call for research for consumer profiles and contextual triggers. Future studies could therefore test integrated models linking portfolio accumulation, evaluation, strain, and adjustment while allowing for non-linear and alternative pathways rather than imposing a single sequence. Particular attention should be given to underexamined behaviors such as portfolio cycling, pausing, downgrading, rebundling, and simultaneous changes across multiple subscription categories, which remain much less developed than switching and retention in the current evidence base.

5.4. Overall discussion synthesis

Overall, the review indicates that digital subscription portfolio management is best understood as a configuration problem rather than as a sequence of isolated subscription decisions. The evidence shows that consumers may simultaneously accumulate, evaluate, retain, replace, share, or reconfigure subscriptions, while the importance of each dimension varies across contexts and decision types. Evaluation and Adjustment are comparatively well developed, whereas Strain remains fragmented across separate burden constructs and is rarely treated as a primary portfolio-level phenomenon. The review therefore contributes by integrating otherwise separate research streams within a common portfolio perspective while preserving distinctions among multihoming, bundling, switching, churn, sharing, and access-tier transitions. At the same time, the current evidence base remains methodologically and geographically heterogeneous, with substantial reliance on intentions, hypothetical choices, cross-sectional evidence, and analytical modeling. These limitations reinforce the need for future research that observes actual portfolio change over time, develops stronger measures of portfolio strain, examines consumer heterogeneity across markets, and tests more integrative models of how subscription configurations are formed and modified.

7. CONCLUSION

This systematic literature review examined how consumers manage digital subscription portfolios by synthesizing evidence across four analytically distinct but overlapping dimensions: Accumulation, Evaluation, Strain, and Adjustment. The review shows that digital subscription management extends beyond isolated decisions such as adoption, retention, switching, or churn. Consumers may simultaneously hold multiple services, evaluate alternative configurations, experience different forms of burden or friction, and modify their portfolios through partial switching, multihoming, sharing, tier transitions, bundling, and related forms of reconfiguration. Across the reviewed evidence, Evaluation and Adjustment are the most extensively represented dimensions, whereas Strain remains comparatively underdeveloped and dispersed across financial, switching, fragmentation, privacy, coordination, and management-related burdens.

The main contribution of the review is therefore to integrate previously fragmented subscription behaviors within a broader portfolio-management perspective. The four-dimensional framework provides a common structure for understanding how subscription configurations are formed, assessed, experienced, and modified, while avoiding the assumption that these processes occur in a fixed sequence. The substantial overlap among the dimensions supports their usefulness as an organizing framework, but the reviewed evidence does not establish a universal Accumulation → Evaluation → Strain → Adjustment pathway or a common causal chain.

At the same time, the current evidence base remains limited by its reliance on heterogeneous research designs and predominantly intended, hypothetical, self-reported, or model-derived behaviors rather than directly observed portfolio changes. Future research should therefore place greater emphasis on longitudinal and behavioral evidence, stronger conceptualization and measurement of portfolio strain, greater cross-market and consumer-level heterogeneity, and integrative models that capture alternative forms of portfolio reconfiguration. Overall, treating digital subscriptions as interconnected consumer portfolios offers a broader basis for understanding contemporary subscription behavior than focusing on individual subscription decisions alone

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