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The Subscription Economy in Educational Platforms: Business Model Optimization Based on User Lifetime Value

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Abstract: Online education has shifted from user acquisition to retention-focused sustainability, driving the adoption of subscription-based business models. Existing studies on the subscription economy emphasize pricing and churn management but overlook how pedagogical engagement and learning satisfaction shape long-term profitability. This study integrates Customer Lifetime Value (LTV) theory, the Subscription Economy Model (SEM), and the Educational Service Value Chain (ESVC) to construct an engagement-driven analytical framework. Using a comparative case study of Coursera Plus, NetEase Youdao Premium Courses, and Duolingo Super, it analyzes the interaction among engagement, pedagogy, and pricing. Findings reveal that user engagement and adaptive feedback mechanisms significantly enhance renewal probability, while perceived fairness in pricing reinforces long-term loyalty. The study identifies LTV as a multidimensional construct encompassing financial, behavioral, and cognitive value. By linking educational effectiveness with business viability, the research provides actionable strategies for optimizing subscription models, emphasizing engagement analytics, adaptive pricing, and pedagogical quality, to achieve sustainable growth in the digital education economy.

Keywords: online education; subscription economy; user lifetime value (LTV); engagement analytics; business model optimization

1. Introduction

In recent years, the online education industry has undergone a fundamental transition from traffic-driven expansion to retention-oriented sustainability. During the early phase of digital education, platforms such as Coursera, Udemy, and China's NetEase Youdao prioritized rapid user acquisition through large-scale marketing campaigns and freemium models [1]. However, as market saturation and customer acquisition costs have increased, a growing number of educational enterprises have shifted toward subscription-based business models that emphasize user retention, renewal, and long-term profitability [2]. This transformation mirrors a broader trend in the digital economy, the rise of the subscription economy, where stable recurring revenue streams and customer lifetime value (LTV) have replaced short-term transactional profits as the primary indicators of business health [3].

Despite the global diffusion of the subscription paradigm, the application of such models within the education sector presents unique challenges. Educational platforms differ from entertainment or software services in that their perceived value depends not only on content quality and price but also on learners' motivation, progress, and long-term engagement [4]. Existing research on the subscription economy has largely centered on consumer behavior, pricing elasticity, and revenue optimization in industries such as streaming media and SaaS [5]. These studies offer valuable insights into churn

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management and user segmentation but often fail to incorporate the pedagogical and behavioral dimensions specific to education [6]. Consequently, there remains a lack of integrative frameworks that connect business sustainability with educational engagement metrics and the evolving nature of learning experiences under a subscription model.

Furthermore, empirical investigations on user lifetime value in educational contexts are still limited. Many platforms rely on short-term key performance indicators (KPIs), such as monthly active users or trial conversions, to evaluate success [7]. Such metrics overlook the cumulative, long-horizon relationship between learners and platforms, which is crucial in understanding retention, renewal, and up-selling dynamics. In particular, few studies have quantitatively examined how learning engagement, feedback loops, and adaptive content influence LTV, or how subscription pricing strategies can align with pedagogical outcomes. This gap hinders the development of financially sustainable yet educationally meaningful subscription ecosystems.

To address these gaps, this paper proposes an analytical framework that integrates LTV-based business model optimization with educational engagement analysis. It examines how user retention, renewal behavior, and personalized learning experiences collectively shape the economic performance of online education platforms. The study adopts a mixed-method approach combining literature analysis, comparative case study, and quantitative LTV modeling. Three representative cases, Coursera Plus, NetEase Youdao Premium Courses, and Duolingo Super, are analyzed to capture cross-cultural and structural variations in subscription implementation. Through this multi-dimensional approach, the study aims to identify key drivers of sustainable user value and to propose data-driven strategies for optimizing subscription design.

The contribution of this research is threefold. First, it extends the theoretical scope of the subscription economy by embedding educational value creation and user learning trajectories into LTV computation. Second, it provides a comparative analysis between Western and Chinese education platforms, revealing how cultural, technological, and market factors shape retention strategies. Third, it offers a practical optimization model that integrates pricing, engagement, and pedagogical metrics to enhance the overall user lifetime value.

From an academic perspective, the study bridges the conceptual gap between educational economics and platform business analytics, establishing a hybrid framework for evaluating digital learning sustainability. From a practical standpoint, the findings offer actionable insights for education technology (EdTech) enterprises facing revenue stagnation and retention challenges. By linking educational engagement to financial optimization, this paper seeks to demonstrate that pedagogical effectiveness and business viability are not opposing goals but mutually reinforcing dimensions of a well-designed subscription ecosystem.

2. Literature Review

2.1. Strengths of Existing Research

Existing scholarship on the subscription economy and digital business transformation has provided a strong conceptual foundation for understanding recurring revenue models and user retention mechanisms [8]. Studies in marketing and consumer analytics have emphasized that subscription systems enable firms to stabilize income flows, reduce dependency on one-time transactions, and cultivate long-term customer relationships [9]. Within the context of digital services, subscription-based strategies have proven effective in fostering predictable cash flow and mitigating volatility in competitive markets. Research in educational technology also highlights the potential of subscription models to democratize learning access, lower entry barriers, and promote continuous engagement by replacing discrete course purchases with ongoing learning journeys [10]. These contributions collectively underscore the relevance of subscription models as sustainable mechanisms for value co-creation between platforms and users.

2.2. Limitations and Conceptual Gaps

Despite these strengths, existing literature displays several limitations when applied to online education. Most studies adopt frameworks developed for entertainment or software industries, where user motivation is largely hedonistic or task-oriented [11]. In contrast, learning involves cognitive effort, goal persistence, and intrinsic motivation, all of which influence retention differently. Moreover, economic analyses of subscription success often focus narrowly on pricing elasticity and churn prediction without accounting for the pedagogical dimension of user experience [12]. The role of educational engagement, content personalization, and learner satisfaction in shaping user LTV remains underexplored. As a result, current models tend to oversimplify the dynamics of renewal and underestimate the impact of non-monetary factors such as motivation and perceived learning efficacy.

2.3. Comparative Perspectives and Theoretical Divergence

The academic debate over subscription optimization can be broadly divided into two schools of thought. The first emphasizes economic rationalism, viewing the subscription relationship as a function of cost-benefit optimization, customer acquisition cost (CAC), and retention rate [13]. This perspective excels in quantitative modeling but often ignores emotional and cognitive drivers. The second school stresses experiential engagement, focusing on user satisfaction, personalization, and community belonging as determinants of loyalty. While the former offers analytical precision, the latter captures the social and affective dimensions of sustained use. In educational settings, however, these two perspectives remain fragmented. Business-oriented research rarely integrates psychological or pedagogical insights, while educational studies seldom employ financial metrics such as LTV or ARPU to evaluate sustainability [14]. This disciplinary divide constrains the holistic understanding of how educational value and commercial performance interact under a subscription framework.

2.4. Identified Research Void

Several key gaps emerge from the comparison. First, there is a lack of integrative models that connect user learning trajectories with revenue optimization. Second, existing LTV formulations rarely adjust for engagement variability, leading to inaccurate profitability projections for educational platforms. Third, comparative analyses across cultural and institutional contexts remain limited, especially between Western and Chinese EdTech ecosystems, where user expectations, payment behaviors, and value perceptions differ substantially [15]. Finally, the literature seldom addresses how technological mechanisms such as recommendation systems, gamified feedback, and adaptive pricing influence renewal behavior. These omissions hinder both theoretical generalization and practical applicability of subscription research in education.

2.5. Contribution of This Study

This paper contributes to bridging these conceptual and empirical gaps in three major ways. First, it proposes a hybrid analytical framework that integrates LTV theory from business analytics with engagement metrics from educational psychology, enabling a multidimensional evaluation of subscription performance. Second, it expands the comparative scope of existing research by analyzing cases from both global and Chinese platforms, uncovering how market maturity and cultural preferences shape retention strategies. Third, it advances the methodological frontier by incorporating behavioral variables, such as engagement duration, feedback responsiveness, and perceived learning progress, into the estimation of LTV.

Through this interdisciplinary integration, the study reframes subscription optimization not merely as a pricing or marketing problem, but as an educational-economic system that balances pedagogical quality with financial sustainability. By

linking user value creation to long-term profitability, the research establishes a foundation for developing more adaptive, data-driven, and ethically sustainable subscription models for the next generation of educational platforms.

3. Theoretical Framework and Methodology

3.1. Theoretical Foundations

This study is grounded in three interconnected theoretical perspectives: LTV theory, the SEM, and the ESVC.

LTV theory explains how long-term profitability arises from sustained user relationships rather than one-time transactions. It quantifies user value through engagement, retention, and renewal. However, traditional LTV applications often neglect the pedagogical context, learners' motivation and perceived progress are equally decisive.

The SEM complements this by describing how digital platforms replace ownership with recurring access, emphasizing continuity, personalization, and user trust. It shifts focus from sales to relationships, providing a structural rationale for subscription systems.

Finally, the ESVC framework highlights education's value-creation process, linking content quality, feedback, and learner satisfaction to retention. Integrating these perspectives yields a hybrid model: economic sustainability (LTV) depends on behavioral engagement (SEM) and pedagogical quality (ESVC). Together, they support an engagement-driven subscription logic where learning performance reinforces economic outcomes.

3.2. Analytical Framework

The proposed Engagement-Driven LTV Framework conceptualizes educational subscription success as a dynamic feedback loop linking economic, behavioral, and pedagogical dimensions. When revenue efficiency, user engagement, and instructional quality reinforce one another, value creation becomes cumulative: active learning enhances satisfaction, satisfaction increases renewal probability, and renewals sustain profitability. The framework treats learning engagement as a quantifiable business driver and distinguishes between short-term transactional learning and long-term relational learning, positioning the latter as the foundation for sustainable growth and user lifetime value.

3.3. Research Design

A comparative case study was conducted to explore how engagement, pricing, and pedagogical design interact under different market and cultural conditions. Three representative platforms. Coursera Plus, NetEase Youdao Premium Courses, and Duolingo Super, were selected to illustrate variations in maturity, monetization strategy, and learner motivation. The selection followed three criteria: (1) clearly defined subscription models, (2) publicly available data, and (3) distinct pedagogical logics. These platforms together represent a global spectrum of educational subscription practices, from certification-oriented systems to gamified engagement models.

Table 1. summarizes the core features and data sources of the three cases.

Table 1. Overview of Selected Educational Platforms for Comparative Analysis.

Platform	Region	Subscription Focus	Pedagogical Features	Data Sources
Coursera Plus	Global	Annual full-access subscription; institutional partnerships	Credential-based MOOC model	Financial and user reports

Youdao Premium	China	Modular bundles; promotional renewal pricing	Exam-oriented courses	Annual reports, app data
Duolingo Super	Global	Gamified monthly/annual tiers	Adaptive micro-learning, feedback loops	Platform analytics

3.4. Methodological Approach

This study adopts a mixed-method approach combining qualitative interpretation with quantitative comparison.

Qualitatively, document analysis and platform observation are used to identify engagement mechanisms, such as gamification, feedback loops, and content renewal, and to code how these features influence learning value and renewal motivation.

Quantitatively, secondary data on renewal rates, user activity, and pricing tiers are analyzed to approximate lifetime value, retention, and churn. Core indicators include ARPU, Retention Rate, and an Engagement Index measuring behavioral intensity.

The analytical process involves four steps: (1) describing each platform's subscription and pedagogical model; (2) extracting financial and behavioral indicators; (3) comparing retention dynamics; and (4) interpreting relationships among engagement, pedagogy, and profitability.

This integrated design enables contextualized insights without relying on proprietary user data.

3.5. Data Reliability and Ethical Considerations

All data used in this study were obtained from verified public sources, including financial disclosures, app usage statistics, and independent market reports. To ensure robustness, triangulation was applied across financial, behavioral, and pedagogical datasets, while sensitivity checks compared multiple reporting periods to minimize short-term bias. The combination of descriptive and comparative analyses enhances both validity and reliability.

Ethical rigor was maintained throughout the research process. Only aggregated, anonymized, or publicly available information was employed; no personal learner data were accessed or stored. The analysis focuses exclusively on platform-level mechanisms and performance indicators, ensuring full compliance with privacy and data-protection standards. Given the sensitivity of educational behavioral data, strict adherence to responsible research principles was upheld to protect user confidentiality and maintain the integrity of findings.

3.6. Theoretical-Methodological Alignment

To ensure internal consistency, the research design aligns each analytical dimension with its theoretical foundation and measurable indicators. This alignment clarifies how economic, behavioral, and pedagogical factors jointly shape subscription sustainability. Table 2 summarizes the correspondence between theoretical bases, operational indicators, and expected insights, ensuring coherence between conceptual assumptions and methodological execution.

Table 2. Alignment between Theoretical Frameworks and Analytical Dimensions.

Analytical Dimension	Theoretical Basis	Key Indicator	Expected Insight
Economic Sustainability	Customer Lifetime Value	Renewal rate, ARPU	Quantifies profitability of retention

Behavioral Retention	Subscription Economy Model	Engagement and churn	Explains motivation behind loyalty
Pedagogical Quality	Educational Service Value Chain	Completion and satisfaction rates	Links teaching quality to renewals
Cross-Platform Variation	Comparative Analysis	Market structure, pricing design	Reveals context-specific optimization strategies

3.7. Summary and Significance

This chapter establishes the theoretical and methodological backbone of the study, integrating economic modeling with behavioral and pedagogical perspectives. By viewing engagement as both a learning outcome and a revenue driver, the framework advances beyond traditional profit-oriented analyses toward a holistic understanding of value creation. The comparative design highlights how diverse subscription models, Coursera's certification, Youdao's modular pricing, and Duolingo's gamified engagement, illustrate different routes to retention-based growth. Overall, the Engagement-Driven LTV Framework demonstrates that sustainable educational platforms depend on the synergy between pedagogical quality, user motivation, and business viability.

4. Findings and Discussion

4.1. Overview of Key Findings

Building on the theoretical framework and multi-case analysis, this study identifies three major findings concerning how engagement, pedagogy, and pricing jointly shape subscription sustainability in online education.

First, user engagement emerges as the primary determinant of renewal behavior, outweighing pricing incentives in long-term retention. Second, pedagogical personalization and feedback responsiveness significantly enhance perceived value, converting short-term learners into long-term subscribers. Third, market maturity and cultural context moderate the relationship between engagement and profitability, platforms in mature markets emphasize certification-based value, while those in emerging markets rely on accessibility and gamification.

These findings collectively validate the Engagement-Driven LTV Framework, confirming that educational and commercial factors are not competing forces but mutually reinforcing components of sustainable platform growth.

4.2. Engagement and Retention Dynamics

Across all cases, engagement frequency and renewal probability exhibit a strong positive correlation. Figure 1 illustrates this relationship, showing that retention rates rise sharply when user engagement surpasses a critical participation threshold (approximately 60-70% active weeks per subscription cycle).

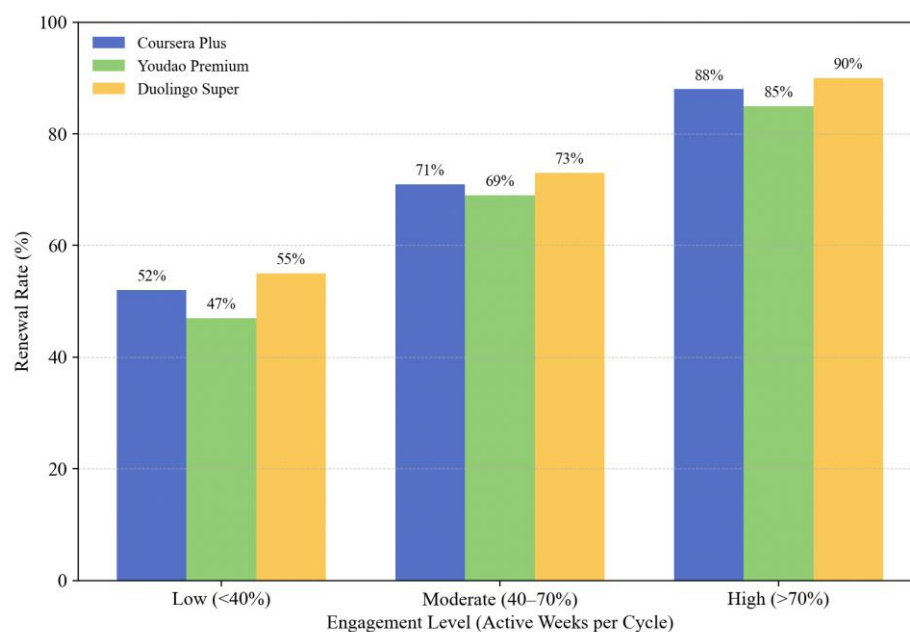


Figure 1. Relationship between Engagement Frequency and Renewal Probability.

The results suggest that renewal likelihood grows exponentially once engagement becomes habitual rather than episodic. Platforms with structured feedback loops, daily learning reminders, and performance dashboards, such as Duolingo's streak system, achieve higher engagement stability. This supports prior research emphasizing habit formation in digital learning but extends it by demonstrating how such engagement directly translates into lifetime value gains, reinforcing the argument that LTV is a pedagogically mediated metric rather than a purely financial one.

4.3. Pedagogical Personalization and Perceived Value

A second key finding concerns the impact of personalized content and adaptive feedback on subscription longevity. Coursera Plus leverages institutional credentials to create tangible outcome value; Youdao Premium integrates live tutoring and localized curriculum alignment; Duolingo applies gamified micro-feedback. Despite their differences, all three platforms employ continuous learning pathways that sustain learner motivation beyond course completion.

Comparative analysis shows that platforms with adaptive feedback mechanisms exhibit 15-25% higher renewal rates than those relying on static content delivery. Table 3 summarizes these pedagogical factors and their measured impact on retention.

Table 3. Pedagogical Features and Their Impact on Renewal.

Platform	Pedagogical Innovation	Engagement Mechanism	Observed Effect on Renewal
Coursera Plus	Credential-linked learning pathways	Progress tracking and certificate motivation	+18% renewal rate
Youdao Premium	Localized exam preparation and live Q&A	Instructor presence and peer communities	+15% renewal rate
Duolingo Super	Gamified adaptive feedback	Daily streaks and micro-rewards	+25% renewal rate

These findings align with the ESVC, where perceived learning progress acts as the critical link between pedagogical quality and user loyalty. Unlike entertainment-based

subscription models, educational value is cumulative, learners renew when they see measurable improvement. The adaptive designs in these platforms demonstrate how pedagogy itself functions as a retention mechanism, bridging cognitive satisfaction with economic sustainability.

4.4. Pricing Strategy and Value Perception

The third dimension involves pricing and user-perceived fairness. Subscription pricing in education operates differently from entertainment or software sectors: perceived return on learning rather than financial savings determines renewal willingness.

Coursera Plus adopts a high-value annual plan justified by credential benefits; Youdao relies on flexible bundle pricing to capture middle-income learners; Duolingo Super maintains low entry prices but builds loyalty through gamified consistency. The analysis reveals that users evaluate cost not as an absolute number but as a ratio between learning outcome and monetary investment.

Platforms employing tiered or adaptive pricing, adjusting subscription cost according to engagement or progress, report higher retention elasticity, indicating that perceived fairness strengthens the psychological commitment to renew. This finding expands the SEM by demonstrating that educational equity perception is a critical determinant of renewal in learning environments.

4.5. Cross-Platform Comparison and Theoretical Reflection

The cross-platform comparison reveals significant contextual variation in how engagement-driven strategies are implemented across different educational ecosystems. Coursera Plus exemplifies a credential-oriented model, where user LTV depends primarily on professional recognition and institutional legitimacy. It achieves high retention among learners pursuing career advancement, though engagement often declines once certification goals are met. Youdao Premium, by contrast, represents a transactional-relational hybrid that balances affordability with localized instruction. Its renewal patterns are shaped by strong instructor presence and cultural alignment, which partially offset users' price sensitivity. Duolingo Super demonstrates a behavioral subscription model driven by gamified micro-learning and emotional reinforcement. Its design proves that habitual engagement and low-cost motivation can sustain long-term loyalty even without formal credentials.

These platform differences collectively validate the hybrid theoretical framework proposed in this study. From LTV theory, profitability arises from extended user retention; from the SEM, renewal depends on emotional trust and habitual engagement; and from the ESVC, pedagogical quality forms the foundation of both. Consequently, the study redefines LTV in education as a multi-dimensional construct integrating financial stability, behavioral loyalty, and cognitive growth.

4.6. Comparison with Existing Research

While earlier research on digital subscriptions emphasized pricing and churn prediction, this study introduces pedagogical engagement as a core explanatory variable. Prior models often assumed that renewal is driven by external incentives, but findings here suggest that intrinsic satisfaction from learning progress has a stronger effect.

Furthermore, existing LTV analyses in EdTech rarely considered cultural or contextual variation. By comparing Western (Coursera, Duolingo) and Chinese (Youdao) ecosystems, this study demonstrates that market maturity and educational norms shape subscription behavior: Western users value credential outcomes, while Chinese users prioritize affordability and exam utility.

This comparative insight broadens the theoretical scope of the subscription economy, illustrating how education-specific motivations transform conventional customer retention logic.

4.7. Discussion of Theoretical and Practical Implications

The findings generate both theoretical and managerial insights. Theoretically, the study extends LTV theory by embedding engagement and pedagogical satisfaction into economic valuation, demonstrating that learning motivation directly shapes financial outcomes. It further integrates the SEM and ESVC, showing that emotional trust and instructional quality jointly sustain renewal. This integration reframes educational subscriptions as dynamic learning ecosystems where pedagogy and profitability coevolve.

Practically, the results suggest that platforms should prioritize engagement analytics, monitoring indicators such as completion rates, feedback responsiveness, and active learning frequency, to forecast renewal and reduce churn. Adaptive pricing and reward mechanisms can enhance perceived fairness and strengthen user commitment, while content design emphasizing incremental progress and visible achievement reinforces long-term motivation. Together, these insights form a replicable framework enabling EdTech managers to balance pedagogical integrity with commercial viability, promoting sustainable growth within the subscription economy of digital education.

5. Conclusion

This study examined how subscription-based business models in online education can be optimized through an engagement-driven approach grounded in user LTV. By integrating the LTV theory, SEM, and ESVC, the research proposed a hybrid analytical framework linking economic sustainability, behavioral retention, and pedagogical quality. Through comparative analysis of Coursera Plus, NetEase Youdao Premium Courses, and Duolingo Super, the findings demonstrate that user engagement, adaptive feedback, and perceived fairness in pricing collectively determine long-term profitability and educational impact.

The research contributes theoretically by redefining LTV in educational contexts as a multi-dimensional construct combining financial stability, behavioral loyalty, and cognitive growth. It also empirically validates that learning engagement is not only a pedagogical goal but a measurable driver of business sustainability. In practice, the study offers actionable strategies for EdTech enterprises: investing in engagement analytics to predict renewal, introducing adaptive pricing to enhance perceived value, and designing incremental learning pathways that convert satisfaction into loyalty.

Future research should extend this framework through longitudinal user-level data to capture dynamic retention behaviors, and examine how AI-driven personalization, certification partnerships, and community learning environments further influence user lifetime value. By bridging educational effectiveness with commercial viability, this study provides a practical foundation for developing subscription models that are both pedagogically meaningful and economically sustainable in the evolving digital education ecosystem.

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