

# ONLINE SERVICES MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT  
FORECASTS FOR 2025-2030





## **Main objective**

A comprehensive presentation of information on the online services market in Poland, along with medium- and long-term development forecasts.

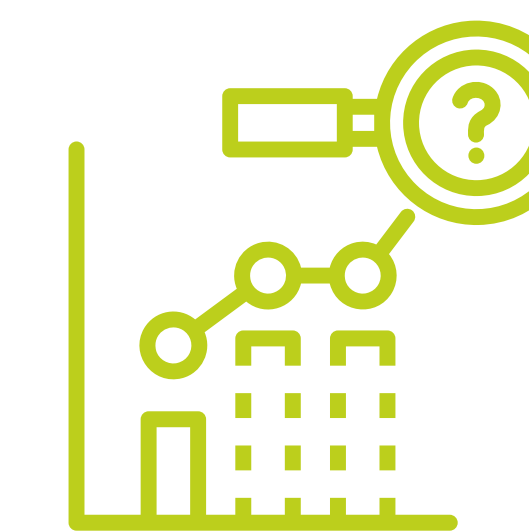
## **Additional objectives**

- presentation of the value of the online services market in Poland
- analysis of the specific segments comprising the market for online services (with particular emphasis on insurance, healthcare, fintech and q-commerce) and analysis of modes of purchase (subscription or single transaction) and payment methods (debit card, credit card, BLIK, Direct Billing and others)
- discussion of the impact of the macroeconomic and geopolitical situation on the market for online services and its growth rate in 2025-2030
- mapping of the competitive environment and presentation of the major players operating in selected segments



### **Time span**

2019-2024



### **Forecast horizon**

2025-2030



### **Geographic coverage**

Poland

## What is included in the report?

- value and growth rate of the market for online services in Poland
- breakdown of expenditure in the market for online services, by key services
- volume and growth rate of the online services in Poland
- value and volume structure of the market for online services, by subscriptions and one-off purchases
- analysis of individual payment methods
- assessment of various service categories in online market
- market development forecasts, by segment
- SWOT analysis
- key players
- findings of PMR Market Experts by Hume's research



## Subject matter

- macroeconomic situation and its impact on the market for online services in Poland
- value and structure of the market for online services, by main categories
- volume and structure of the online services market
- market breakdown into subscriptions and one-off transactions
- ARPU for individual services purchased online
- findings of PMR x Hume's custom research in online services
- assessment of individual service categories in online services market
- mapping of market players, by service
- analysis of different payment methods for online services
- value and volume forecasts for the total market and each of its segments
- payment methods for services ordered online:
  - ↳ Direct-Billing
  - ↳ BLIK
  - ↳ Apple Pay / Google Pay
  - ↳ credit/debit card
  - ↳ SMS
  - ↳ Pay-By-Link quick payments
  - ↳ pre-paid payments in the mobile app
  - ↳ traditional bank transfer
  - ↳ cash
  - ↳ other forms



## Scope

In our analysis of the online services market in Poland, we have considered the following segments:

- **Key traditional services in e-distribution**

- ↳ telecommunication services
- ↳ beauty services
- ↳ e-health
- ↳ insurance services
- ↳ fintech services
- ↳ food delivery services
- ↳ fitness and sports services
- ↳ q-commerce

- **E-tickets: transport / public transport fees**

- ↳ airline tickets
- ↳ train tickets
- ↳ intercity bus tickets

- ↳ shared mobility: city bikes, scooters, mopeds, and car sharing
- ↳ taxi fares (m-taxi)
- ↳ public transport tickets
- ↳ mobile parking payments

- **Digital content**

- ↳ digital games
- ↳ digital video (VOD, SVOD, OTT)
- ↳ adult content
- ↳ digital press
- ↳ digital music
- ↳ e-dating
- ↳ e-books
- ↳ audiobooks

- **E-tickets – entertainment**

- ↳ tickets for sporting events
- ↳ cinema tickets
- ↳ theatre tickets
- ↳ concert tickets
- ↳ tickets for cabarets / shows / club events

- **Other services**

- ↳ e-gambling & e-lottery
- ↳ tourism services
- ↳ educational services
- ↳ paid listings / classified ads



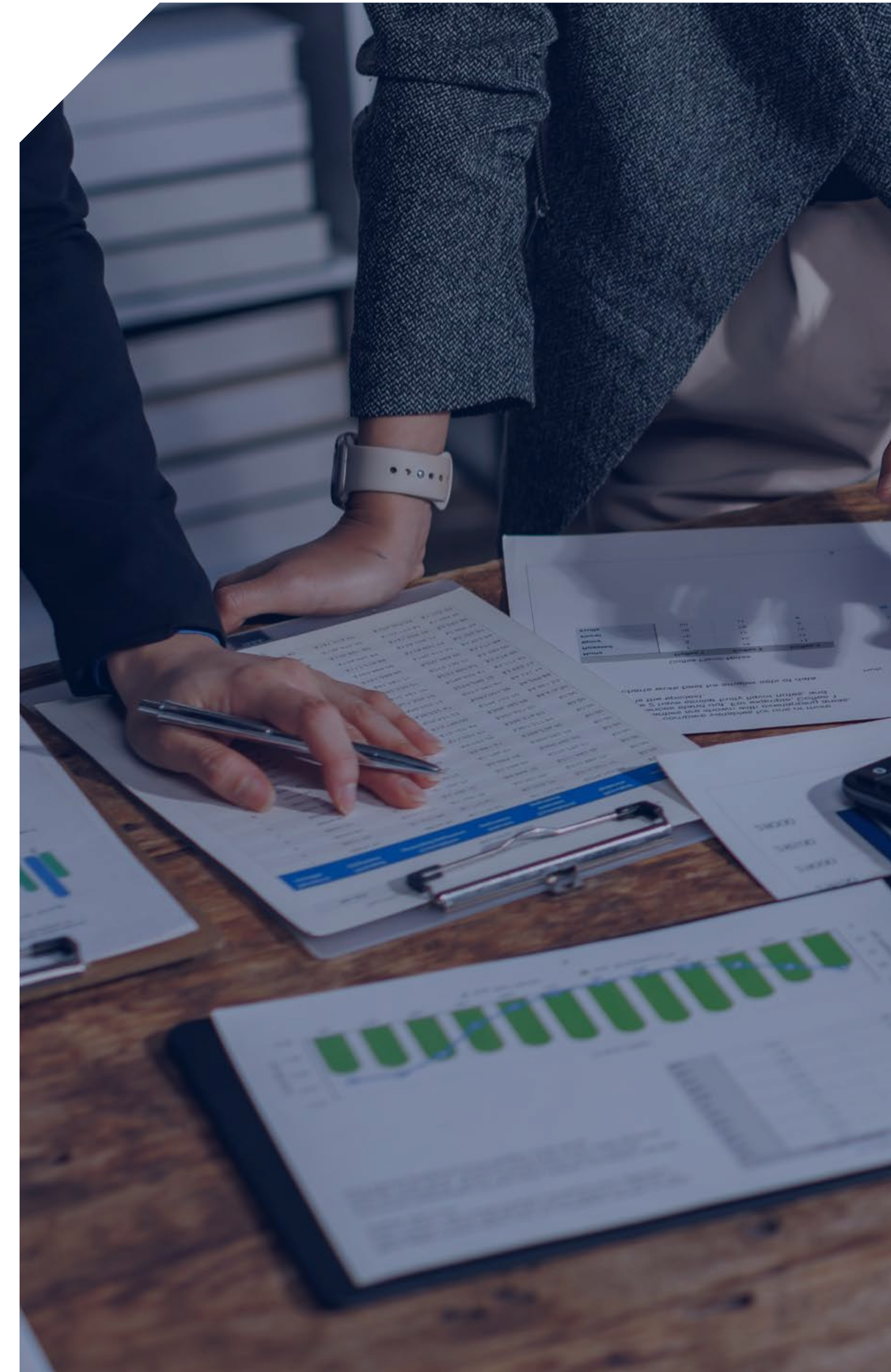
## Research methods used in the report

The report "Online services market in Poland 2025" is based on an analysis of secondary data as well as proprietary research conducted by PMR x Hume's.

The quantitative survey was carried out in May 2025 on a random sample of adult residents of Poland, using the CAWI (Computer-Assisted Web Interview) technique. As part of the study, 1,620 fully completed interviews were conducted with consumers who use at least one digital service.

The secondary sources include:

- financial reports of companies and their parent organizations,
- press releases and analytical briefings, trade press and specialized online portals, general-interest media,
- reports on specific segments of the e-commerce market in Poland and Europe,
- other documents and studies, as well as findings from dedicated projects conducted by PMR x Hume's.





## Forecasts

Long-term market development forecasts were prepared for the report using econometric models and 10-year time series.

The forecasts cover the period 2025-2030.

The forecasts presented in this report are based on nearly 180 variables describing the Polish economy, consumer behavior, and factors influencing the development of the online services market, including:

- GDP per capita and real GDP growth rate,
- CPI inflation,
- average annual LFS unemployment rate and real change in average monthly gross wage in Poland
- real change of household disposable income in Poland and private consumption,
- number of residents in Poland and share of each demographic group.

**The accuracy of the forecasts published in PMR Market Experts' reports is high – the typical error rate (MAPE) is lower than 3-5%.**



## What questions does the report provide answers to?

- What is the value of the market for online services in Poland?
- What is the share of service sales in the e-commerce market in Poland?
- What is the share of subscriptions in online services in Poland?
- What is the value structure of the market for online services in Poland with a breakdown into individual service categories?
- How many people order services via the internet in Poland?
- How many people choose subscriptions and how many opt for single transactions?
- Which online service categories are growing the fastest?
- What payment methods are most popular in online services market in Poland?
- What is the competitive environment in selected market segments and which players have the largest market shares in terms of revenue, number of customers and number of transactions?
- What are the prospects for the market for online services in Poland?
- How does inflation impact service orders in the online channel?



**DATASET** – together with the report, we provide the most important data in an Excel spreadsheet for individual aggregation.

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At PMR Market Experts, we have been preparing cyclical industry reports for over 20 years. Our core specialisations:

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- Retail
- Pharma & Healthcare
- Construction

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- **Pay TV and VOD market in Poland**
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**CONTACT:**

**Monika Szczypta**

Senior Sales & Business Development Manager

tel.: +48 607 979 580

[monika.szczypta@pmrmarketexperts.com](mailto:monika.szczypta@pmrmarketexperts.com)



**OFFICE**

Królewska 57  
30-081 Kraków, Polska



**CONTACT**

tel.: +48 609 290 093  
+48 782 011 000  
[sales@pmrcorporate.com](mailto:sales@pmrcorporate.com)  
[info@pmrcorporate.com](mailto:info@pmrcorporate.com)



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