

PMR MARKET
EXPERTS

PAY TV AND VOD MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030





The number of completely new users of pay TV and VOD services is not growing as fast as in previous years. However, **in contrast to pay TV, VOD continues to maintain clear growth**, as measured by both revenue growth and the number of active subscriptions. This growth is due to the increasing number of users of more than one VOD platform at the same time.

Several trends can be noticed, especially in the context of changing offers and an increasingly fragmented market. The number of platforms is constantly increasing, they are introducing new access models, expand the range of themes, offer special promotions or add VOD to telecom services. These factors result in users not focusing solely on a single platform's offering, but combining several depending on the content they are interested in, which becomes even more important particularly in the context of consumer interest in platforms emerging in the Polish market.

PMR Market Experts' report **"Pay TV and VOD market in Poland 2025"** provides video content market sizing by structure and individual segments. It presents key data and trends in the analysed market, based on a proprietary B2C survey of demand. The individual market segments are also measured in the context of the macroeconomic situation, and, on the basis of these analyses, development forecasts up to 2030 have been prepared.





Main objective

To provide a comprehensive and up-to-date analysis of the situation in the pay TV and VOD services market in Poland and present medium- and long-term forecasts for its development.

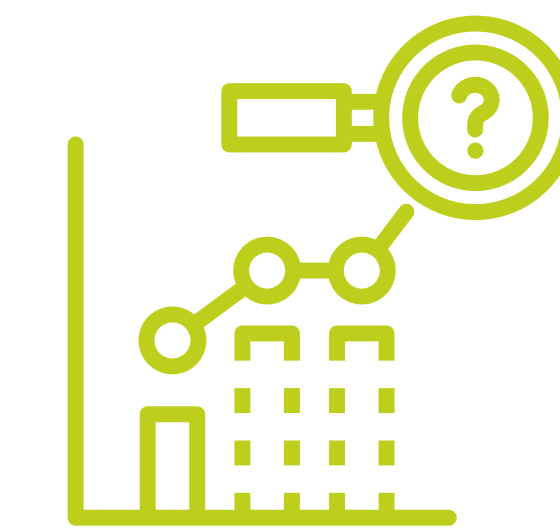
Additional objectives

- to size the pay TV and VOD services market segments, by main technologies, and present forecasts for their development
- to present key macroeconomic, demand-side, supply-side, technological and legal factors affecting the pay TV and VOD services market
- to describe consumer trends in the use of pay TV and VOD services
- to map trends in the global pay TV and SVOD services market as benchmarks for the situation in the Polish market
- to profile major players operating in the pay TV and VOD services market in Poland
- to discuss the impact of the macroeconomic situation on the pay TV and VOD services market in Poland and its growth rate for 2025-2030



Time span

2015-2024



Forecast horizon

2025-2030



Geographic coverage

Poland



What is included in the report?

- **value and growth rate** of the pay TV and VOD services market
- **structure of spending** in the pay TV and VOD services market by access model
- **analysis of the pay TV and VOD services market** in volume terms
- PMR Market Experts **survey findings**
- **analysis of the competitive landscape** in the pay TV and VOD services market
- **KPIs and profiles of key players** in the pay TV and VOD services market
- **consumer trends** in the pay TV and VOD services market
- **consumer profile** for pay TV and VOD services
- **development forecasts** for 2025-2030 for the market and each segment analysed

Consumer survey

For the purposes of the report, a customised consumer **survey of 2,000 respondents was conducted in June 2025.**

Among others, the following have been examined:

- co-existence of VOD and pay TV services
- consumer habits regarding the frequency of use of pay TV and VOD services and the choice of devices on which they watch particular content
- reasons for withdrawing from pay TV and VOD services
- account sharing in SVOD services
- popularity of individual offers and packages
- popularity of free VOD services
- use of services enabling linear television reception on the internet

Subject matter

- macroeconomic situation and its impact on the pay TV and VOD services market in Poland
- value and growth rate of the market measured by the level of consumer spending on pay TV and VOD services
- volume of the pay TV and VOD services market and its change
- number of households using pay TV and VOD services
- ARPU – average revenue per user in the pay TV and VOD services market
- market indicators in the pay TV and VOD services market, including overlap, churn rate, cord-cutting and others
- distribution channel for SVOD services
- analysis of the competitive landscape in the pay TV and VOD services market
- KPIs and profiles of key players in the pay TV and VOD services market
- popularity of digital terrestrial television services (DVB-T2) and its impact on the pay TV and VOD services market

Product categories:

The report analyses in detail the pay TV and VOD services market in Poland. In our analysis, we have considered the following segments:

- pay TV
 - ↳ digital platforms
 - ↳ cable TV networks
 - ↳ IPTV providers
- VOD services
 - ↳ paid SVOD services
 - ↳ VOD TV services
 - ↳ pay-per-view
 - ↳ free of charge services – AVOD



Forecasts

For the purposes of the report, long-term development forecasts were prepared using econometric models and historical time series.

The forecasts cover the period 2025-2030.

In addition to projections for the market value and its segments, the report also covers forecasts for 2025-2030 for selected demographic and macroeconomic indicators, including:

- GDP per capita and real GDP change,
- CPI and price index for telecom services,
- average annual LFS unemployment rate and real change in average monthly gross wage in Poland,
- real change in household disposable income in Poland and private consumption
- number of Poland's residents 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 usually less than 3%.



What questions does the report provide answers to?

- What is the value of the pay TV market in Poland?
- How many pay TV subscribers are there in Poland?
- How many pay TV subscribers in Poland use satellite TV compared to CaTV or IPTV?
- What is the ARPU in the pay TV market in Poland?
- How many subscribers withdrew from pay TV services in Poland?
- What is the competition in the pay TV market in Poland?
- How many people in Poland use free-to-air terrestrial television?
- What is the value of the VOD services market in Poland?
- How many users in Poland use VOD services?
- What is the number of subscriptions to VOD services in Poland?
- What is the competition between streaming platforms?
- How many pay TV subscribers in Poland use VOD services at the same time?
- How does the account sharing in SVOD services affect the market?
- What is the scale of switching from pay TV to SVOD services?



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



DIGITAL & ICT

MARKET ANALYSIS AND 5-YEAR
DEVELOPMENT FORECASTS

- **AI market in Poland**
 - **Cloud computing market in Poland**
 - **IT equipment and consumer electronics resale market in Poland**
 - **Internet of Things market in Poland**
 - **Data centre market in Poland**
 - **Online services market in Poland**
 - **Gaming market in Poland**
 - **Pay TV and VOD market in Poland**
 - **Integrated telecommunications services market in Poland**
 - **Telecommunications services for business and carrier segment in Poland**
 - **ICT market in Poland**
 - **Mobile internet and value-added services market in Poland**
 - **Cybersecurity market in Poland**
 - **Telecommunications market in Poland**
 - **Digital transformation market in Poland (2024)**
- **Business systems and applications market in Poland**
 - **IT services market in Poland**
 - **Labour market and IT wage structure in Poland**
 - **ESG reporting – challenges and development prospects in Poland**
 - **Smart home market in Poland**
 - **Wearables market in Poland**

**NEW
REPORTS**

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- Digital & ICT
- Retail
- Pharma & Healthcare
- Construction

Our reports are more than just a compilation of facts – they are reliable knowledge based on proven methodology. We combine primary and secondary data, proprietary algorithms and econometric models to provide precise information about the market, its values, growth rates, segments and key players.

We are part of Hume's Institute – a 360° research agency specialising in quantitative and qualitative research, forecasting and market predictions.

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