



INTEGRATED TELECOMMUNICATIONS SERVICES MARKET IN POLAND 2023

MARKET ANALYSIS AND DEVELOPMENT FORECASTS FOR 2023-2028

IMPACT OF INFLATION AND WAR IN UKRAINE

About the report

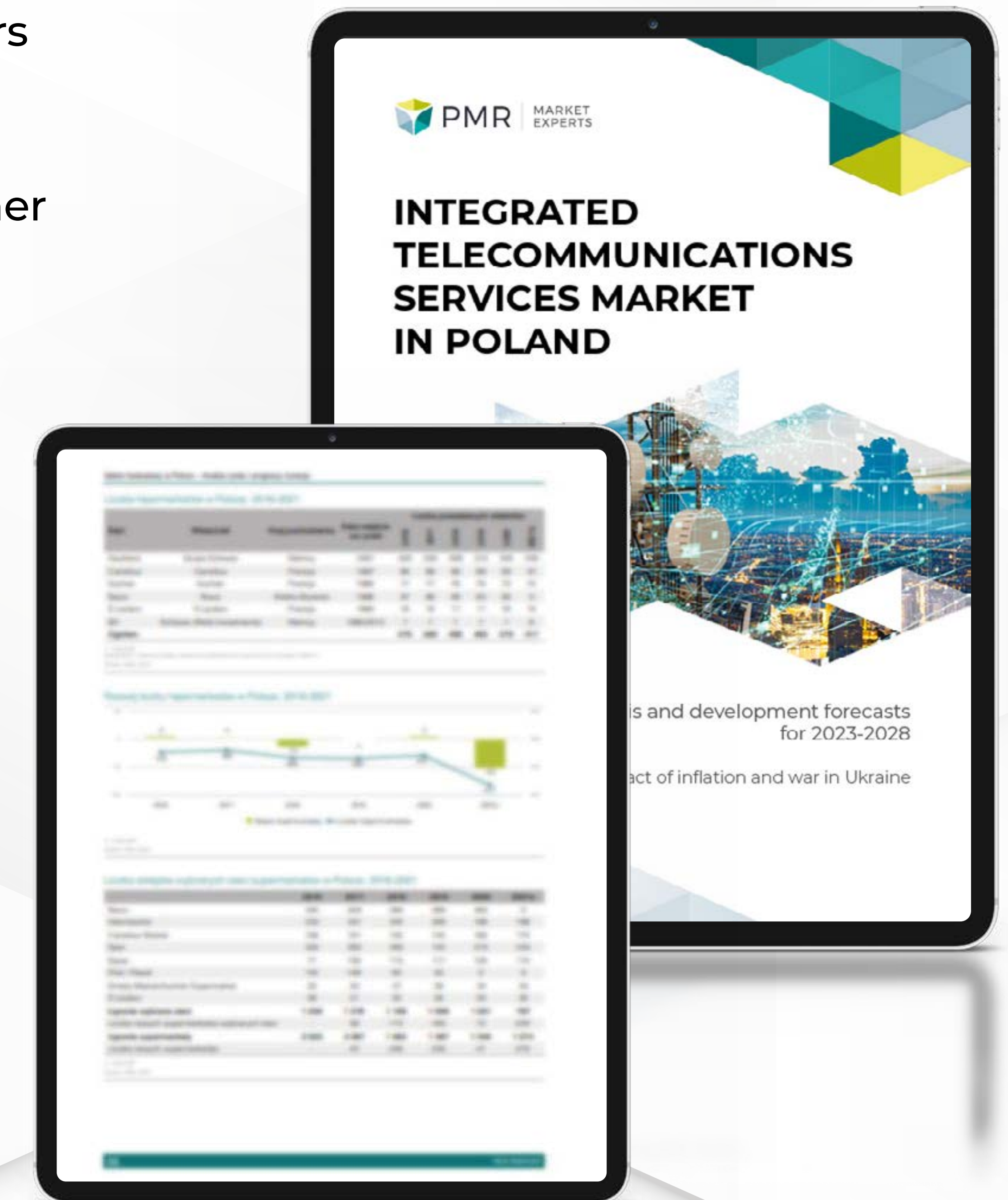
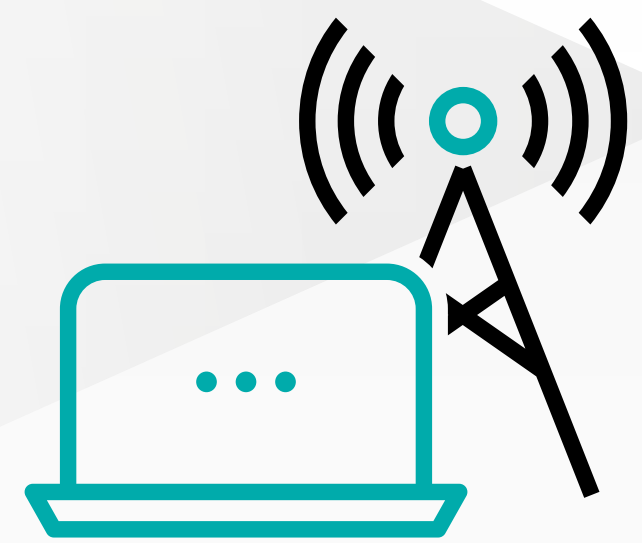
Bundling in the telecommunications services market has been a key strategy of operators for years. Bundling of services brings convenience and cost optimisation benefits to customers and provides operators with a tool to generate higher revenue per customer and reduce subscriber base turnover. Service integration is a competitive field for operators who are looking for ways to make their offers more attractive, for example with VOD services or other additional household services.

The report "**Integrated telecommunications services market in Poland 2023**" presents the results of a comprehensive analysis of the market of integrated telecommunications services. It shows the value of the market and expenses structure, broken down into different types of services.

It also analyses volume aspects, such as:

- number of services sold in the retail telecommunications market,
- number of services sold in bundles,
- average number of services per bundle,
- number of subscribers to bundled services.

It also provides information on consumer trends, including the most frequently chosen service bundles and the reasons behind choosing bundled services. The report presents key market trends, most important events and investments in the context of the market development forecasts for 2023-2028. You will also find data on the competitive environment – detailed profiles of the most important providers of integrated telecommunications services and information on the market structure in terms of the shares of individual providers.



About the report

Main objective:

To present a comprehensive analysis of the integrated telecommunications services market in Poland as well as mid-term and long-term forecasts of its development.

Additional objectives:

The specific objectives of the research and analysis carried out for the report were to identify:

- segments of the integrated telecommunications services market and their development forecasts
- key macroeconomic, demand-side, supply-side, technological and legal factors and trends affecting the integrated telecommunications services market
- consumer trends in the use of integrated telecommunications services
- major players operating in the integrated telecommunications services market
- most important events in the integrated telecommunications services market

What information can be found in the report?

- market value in 2013-2022
- market structure in 2013-2022 by segments
- key events
- macroeconomic, demand-side, supply-side, technological and legal factors affecting the market
- consumer trends in the use of telecommunications services bundles
- major players operating in the integrated telecommunications services market
- development forecasts until 2028 for:
 - the integrated telecommunications services market both in value and volume terms
 - main segments of the integrated telecommunications services market
 - changes in macroeconomic factors

Subject matter and scope

Time span: 2013-2022

Forecast horizon: 2023-2028

Geographic coverage:..... Poland

SCOPE

Retail telecommunications services sold individually and in bundles:

- Mobile telephony (post-paid)
- Fixed-line telephony
- Fixed-line Internet
- Mobile internet (post-paid)
- Pay TV

SUBJECT MATTER

- value of the integrated telecommunications services market, by type of service in the B2C segment
- number of RGUs in the integrated telecommunications services market, by type of service
- overall number of RGUs in the retail telecommunications market, by type of service
- number of subscribers to integrated telecommunications services in the B2C segment
- average number of RGUs per subscriber of integrated telecommunications services
- ARPU from the sales of integrated telecommunications services



Consumer survey

The report presents findings from a study on bundling telecommunications services with VOD services and configurations of telecommunications services from a single provider.

The survey was conducted in Q2 2023 on a sample of 1,522 adult Poles.

Examined included:

- use of telecommunications services in households
- co-occurrence of different services within a single household
- co-occurrence of telecommunications services from a single provider or a number of providers from the same capital group
- accompanying or additional services, including the number of VOD services to which the respondents have access via the operator channel
- streaming services most frequently purchased in the operator channel
- percentage of customers of individual operators with access to VOD services in the operator channel



Additional information

FORECASTS

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

The forecasts cover the period of 2023-2028.

In addition to projections for the market value and its segments, the report also covers forecasts for 2023-2028 for selected demographic and macroeconomic indicators, including:

- per capita GDP and GDP real growth rate
- inflation
- average annual LFS unemployment rate and real change of average monthly gross wage in Poland
- real change in disposable income of Polish households and private consumption
- number of Poland's residents and share of each demographic group

Together with the report, we provide the most important data in the Excel spreadsheet for individual aggregation.

BENEFITS OF PURCHASING THE REPORT

The Report answers, for instance, the following questions:

- What is the value of the integrated telecommunications services market?
- What is the number of subscribers to integrated telecommunications services?
- What are the key trends in the integrated telecommunications services market?
- How does the presence of VOD services in operators' offers affect the integrated telecommunications services market?
- What proportion of services in the retail telecommunications services market is sold in bundles?
- How many services on average are included in a bundle?
- What does the competition scene look like in this market?
- What are the most common service configurations within a bundle?
- What is the average revenue per subscriber in the integrated telecommunications services market?
- What benefits do subscribers and service providers gain from the bundling?



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