

Overview of the Russian IT market for 2023

August 2024



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Internet audience



👥 Russian Internet audience in 2023

102.7 mn

Number of average monthly Internet users in Russia

84%

Share of the Russian population that uses Internet

>95%

Share of the Russian Internet users that use VK services

83%

Share of the Russian population that uses Internet every day

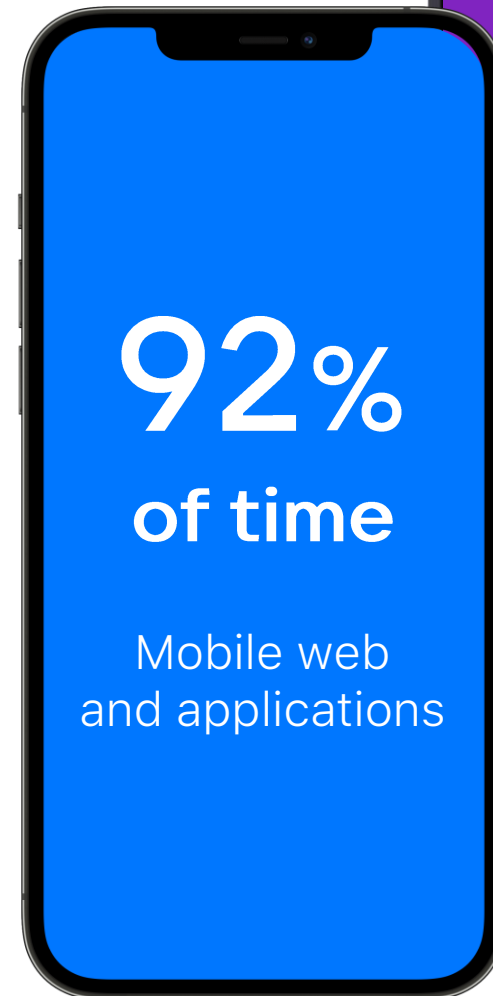
🕒 Time spent online and Internet consumption

Average time spent
by Internet users online

~5 hours per day¹

Average time spent
by users in VK services

~1 hour per day²



The rest
of time

Desktop

🔗 Activities in the Russian Internet

Top categories among online activities
% of time spent online




👥 Social networks
18%



📺 Watching videos
18%

💬 Messengers
17%



🎮 Games
9%

VK projects allow to fill most of the needs of the Internet users

 **ВКонтакте**
 **OK**
 **Дзен**

 **VK Видео**
 **VK Клипы**

 **VK Мессенджер**

 **VK Play**
 **mini apps**

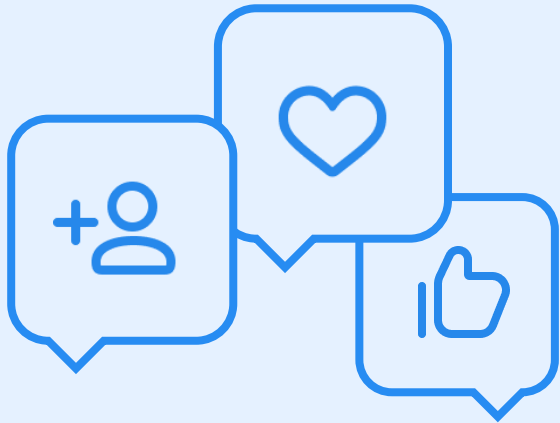
Social networks

81%

Share of the Russian population that uses social networks at least **once a month**¹

60%

Share of the Russian population that uses social networks **every day**¹



101 ▲31 mn vs 2021 mn

Total number of users of Russian social networks in 2023²

Top social networks in Russia³

 **ВКонтакте**

No1

in terms of the number of active authors and the volume of created content

 **OK**

No2

in terms of the volume of created content

Advertising market



Media advertising market in Russia

Market segments, RUB bn	2023	Changes, YoY
Video (TB+OLV)	231.5	▲20%
Audio	20.2	▲32%
Radio	19.5	▲32%
Digital	0.7	▲17%
Publishing	25.4	▲10%
Press	4.6	▼4%
Digital	20.8	▲14%
Out of Home	67.1	▲41%
Outdoor advertising	57.7	▲38%
Classic advertising media	27.7	▲18%
Digital advertising media	30.0	▲64%
Transit advertising	7.0	▲75%
Indoor advertising	2.4	▲30%
Internet services	386.6	▲37%
Media advertising market size	730.7	▲30%

RUB 386.6 bn ▲37% vs 2022
Online advertising market size in 2023

📣 Interactive advertising market in Russia

Market segments, RUB bn, excl. VAT	2023	Changes, YoY
Media advertising (Branding)	74.8	▲29%
Banners	48.7	▲43%
Video	26.0	▲8%
Performance	352.9	▲33%
Classifieds	140.0	▲43%
Retail media	163.5	▲227%
Influencers	18.0	▲50%
Messengers	20.0	▲100%
Mobile operators	30.0	▲50%
Audio	0.7	▲17%
Other	7.4	▲30%
Interactive advertising and online promotion market size	807	▲55%


RUB 427.6 bn ▲32% vs 2022
 Market size of traditional segments of interactive advertising in 2023

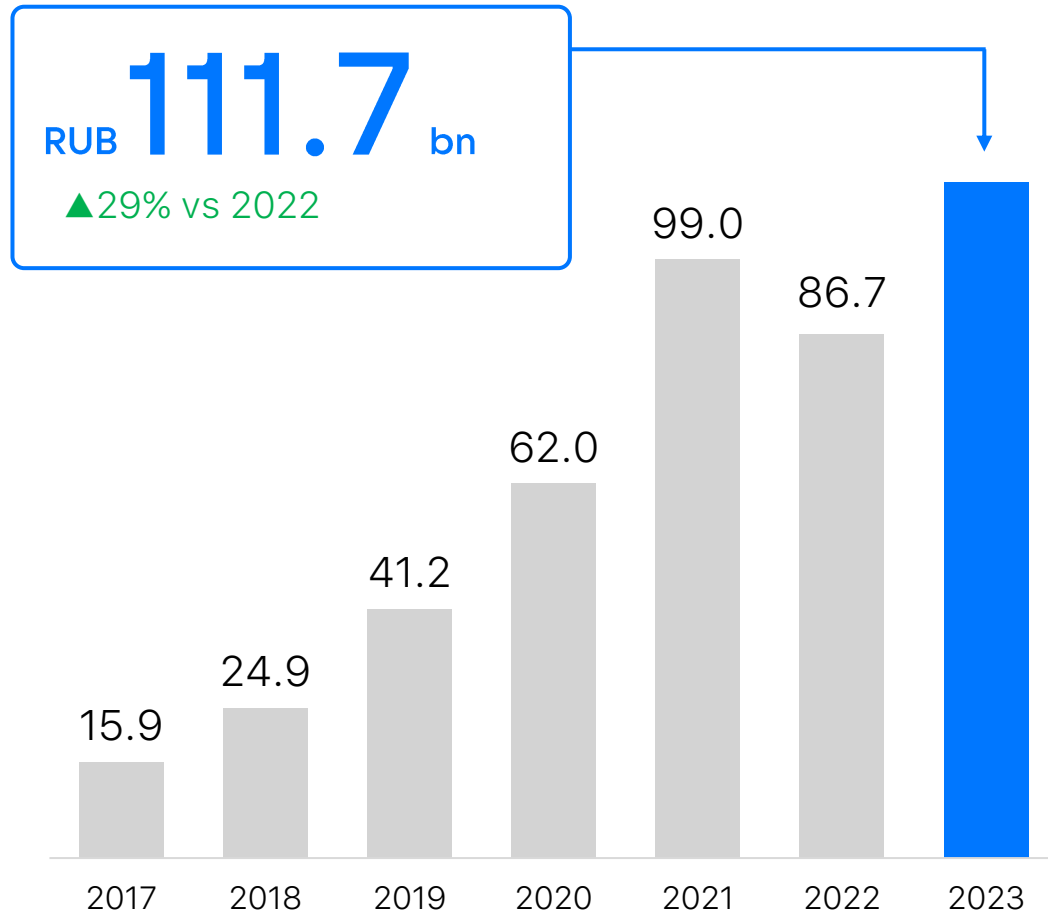

RUB 379.6 bn ▲93% vs 2022
 Market size of innovative segments of interactive advertising in 2023

Video services and music streaming

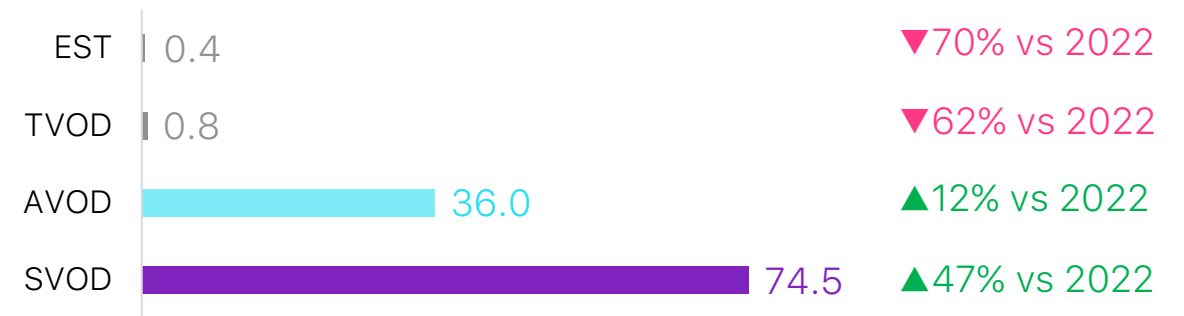


Legal video services market

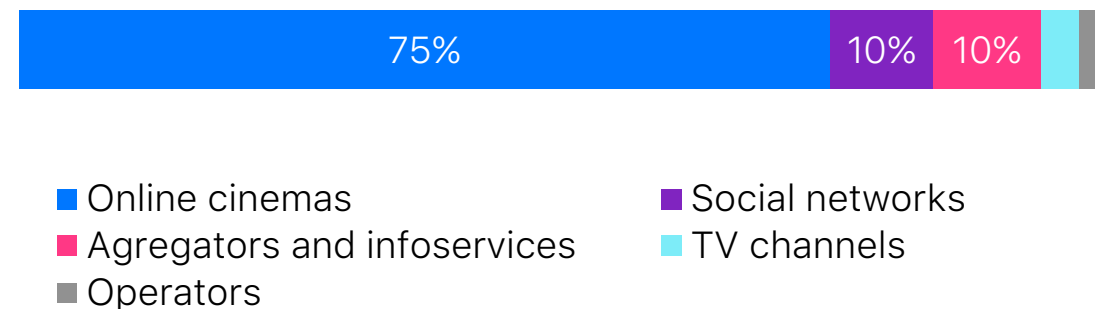
Total revenue
RUB bn (excl. VAT)



Revenue for 2023 by monetization models
RUB bn (excl. VAT)

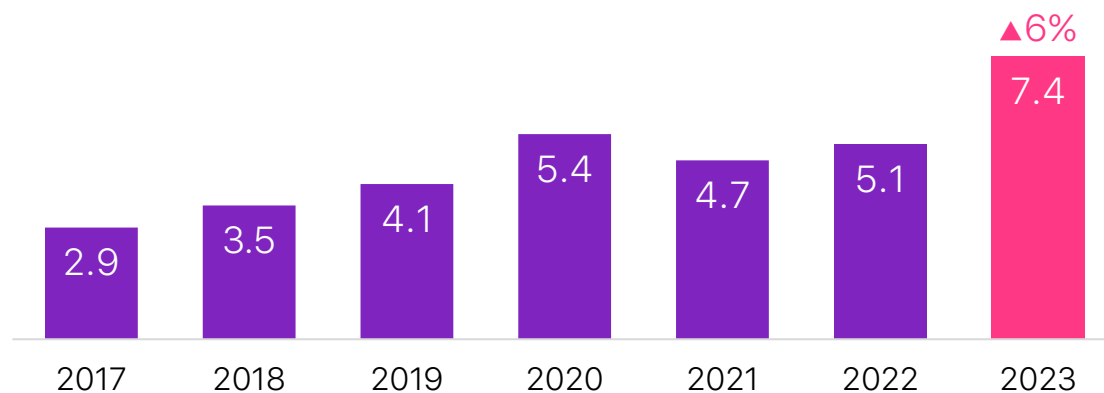


Market revenue breakdown by segments in 2023
%



Smart TV market

Smart TV sales¹
mn pieces



18 ▲40% vs 2022
mn

households had
paid subscriptions
to online cinemas
in 2023²

27 %

of the total number
of households had
paid subscriptions
at the end of 2023²

Ways to consume video content online¹
% of Smart TV users

49%



watch
by subscription

49%



watch free
of charge with
advertisements

4%



buy once
for all

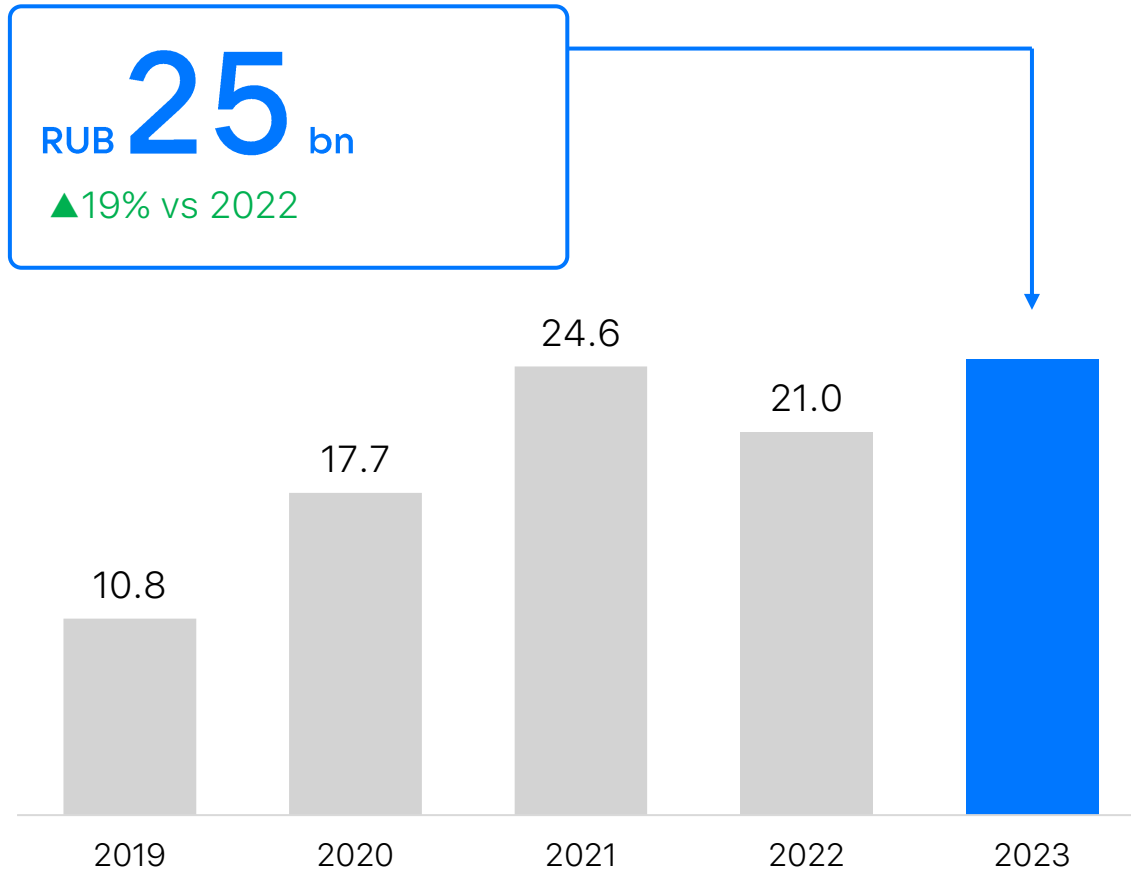
3%



Pay for
each view

🎵 Music streaming market

Total revenue¹
RUB bn



Non-musical content in audio services²

Every third user of audio services



listens
to the radio online



listens
audiobooks



listens
podcasts

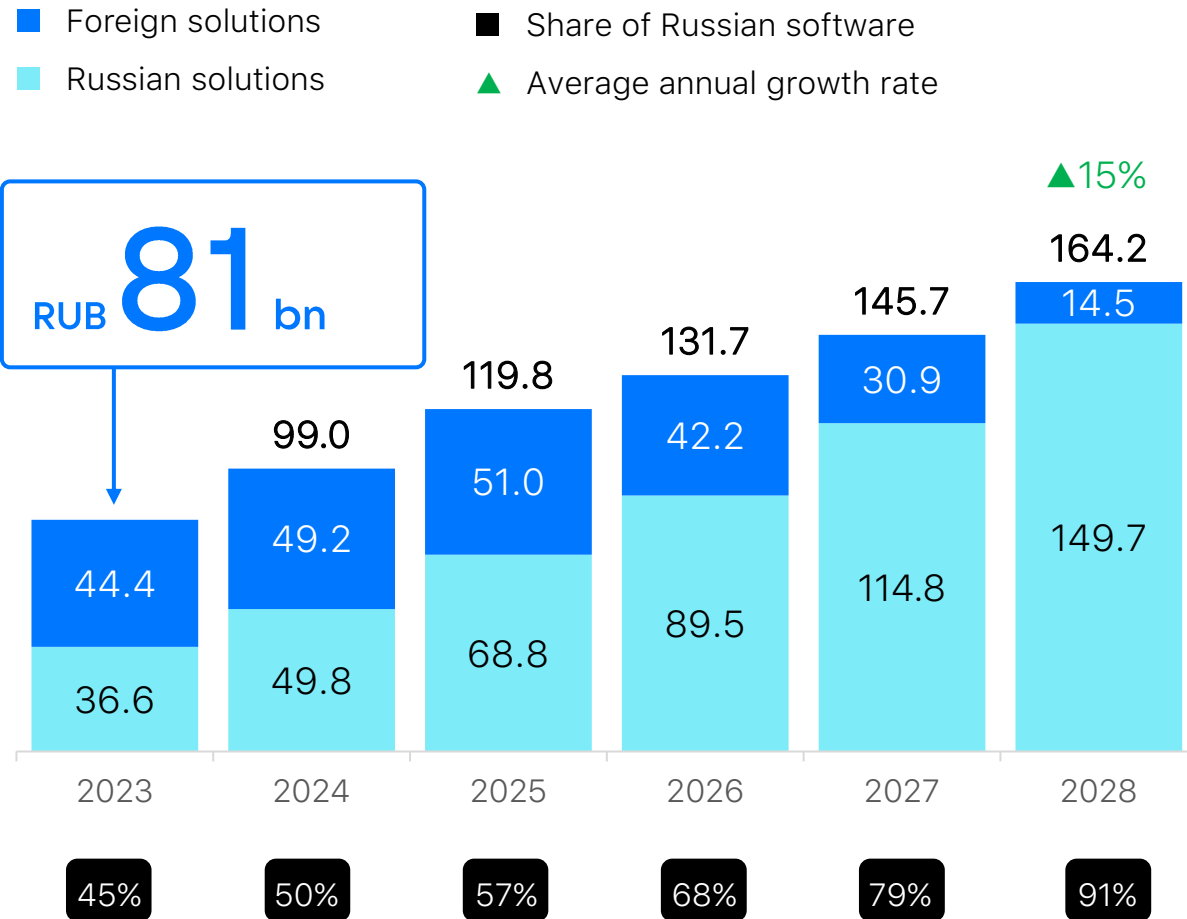
Corporate
software,
including
cloud services



Communication services market

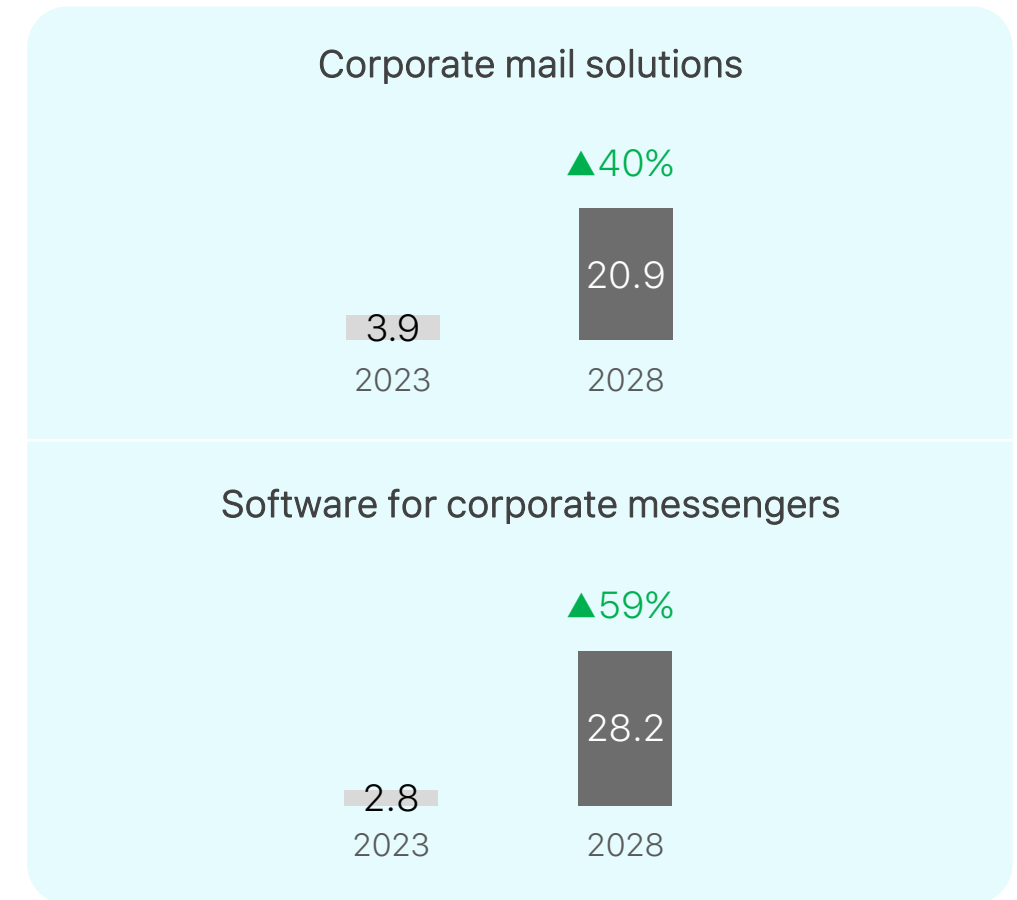
Unified communications market assessment¹

RUB bn



Forecasts for Russian solutions sales growth

RUB bn



(1) Includes corporate telephony and sales of equipment for video conferencing systems.

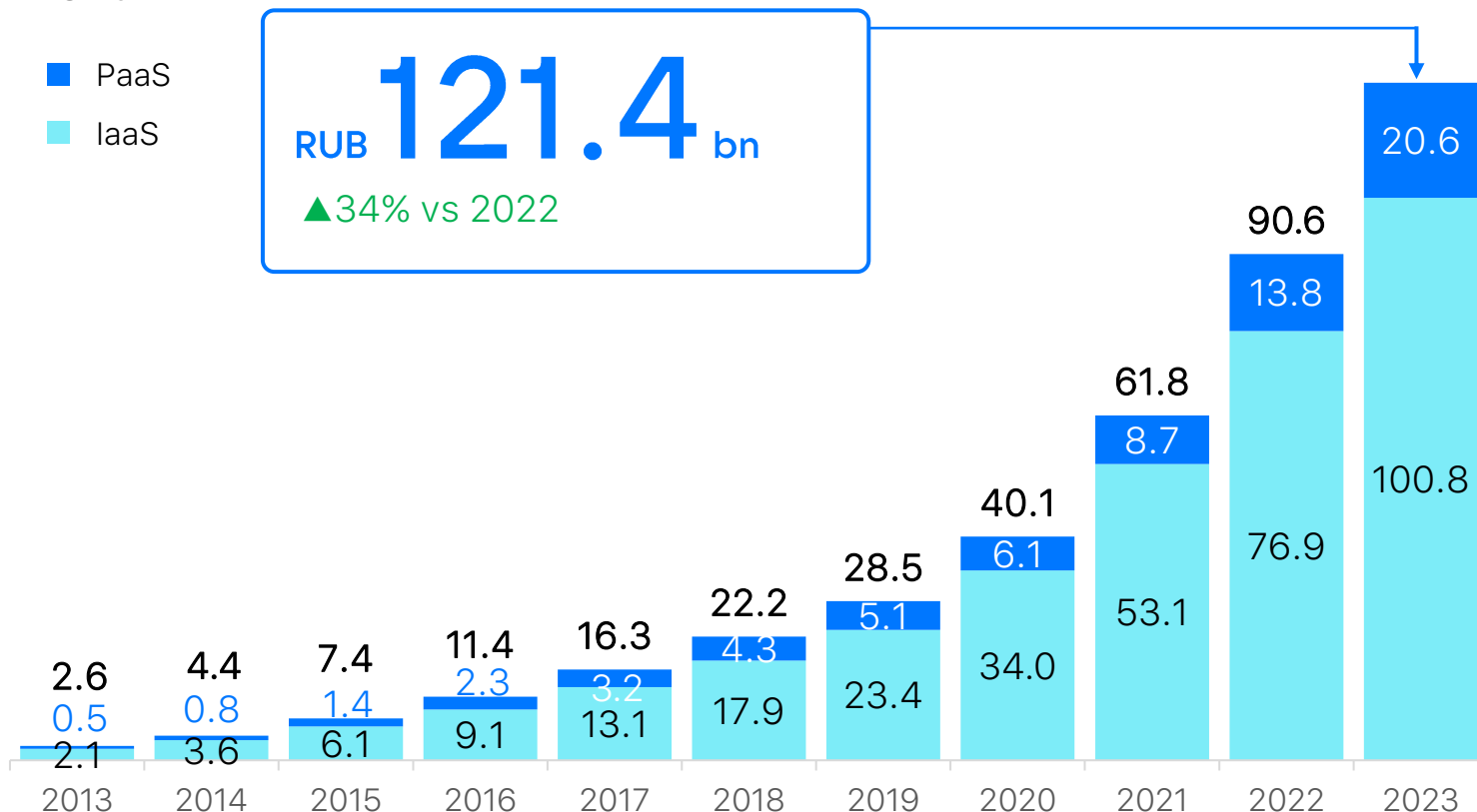
Source: J'son & Partners Consulting – Research of the Russian unified communications market in 2023

Cloud infrastructure services and software market

Cloud infrastructure services market assessment¹

RUB bn

■ PaaS
■ IaaS



▲ 28%

annual market growth rate for 2023 in the IaaS + PaaS segments¹

RUB 440 bn

cloud infrastructure services and software market estimate for 2027 (with a current total growth rate forecast of +20% YoY)²

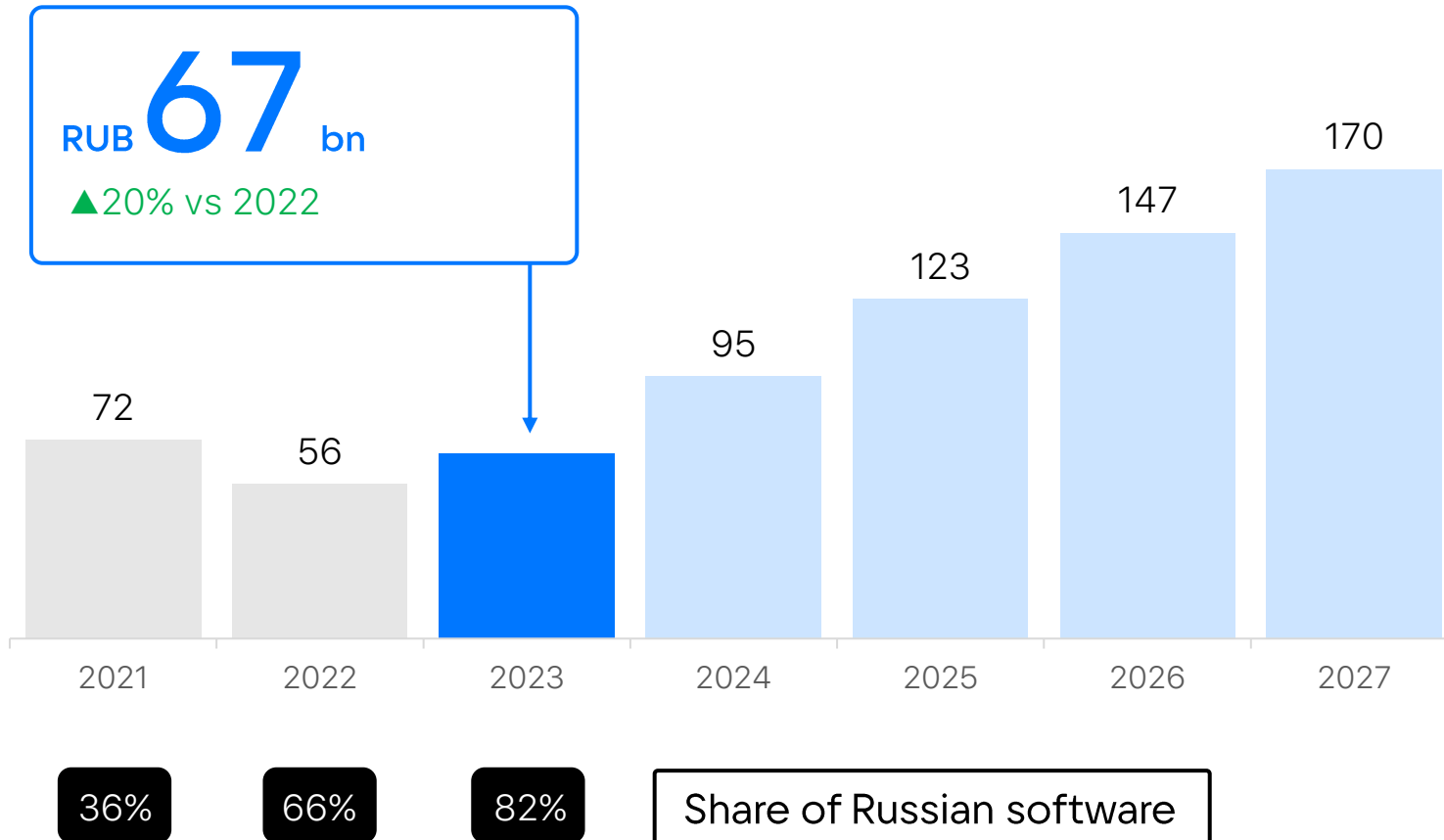
(1) Источник: iKS Consulting – Russian cloud infrastructure services market in 2023. Data for 2023 – forecast.

(2) Company data, including an aggregated assessment of the cloud services market (IaaS and PaaS) and private clouds, as well as infrastructure software: within the framework of DBMS software and data processing tools, the company relies on the assessment of the CSR

Data management services and software market

DBMS and data processing tools market assessment¹

RUB bn



▲25%

forecasted average annual growth rate in 2023–2027²

▲2.5x

estimate of the Russian DBMS and data processing tools market growth in 2027 compared to 2023²

DBMS – Data storage, processing and management tools.

(1) Source: [CSR – Market of data management and processing systems in the Russian Federation](#). (2) Company calculations based on CSR estimates

Online education market



Revenue of educational services in Russia

Revenue of top-100 EdTech companies in 2023

RUB **119** bn

▲32% vs 2022

35%

Additional professional education

▲27% vs 2022

30%

Children's education

▲39% vs 2022

14%

Developers and platforms

▲49% vs 2022

7%

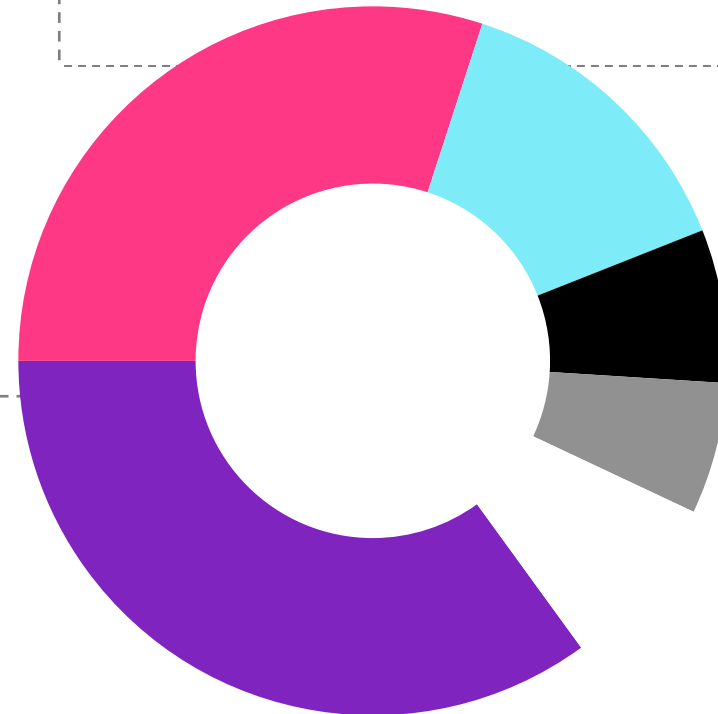
Business education

▲17% vs 2022

6%

Foreign languages

▲14% vs 2022



For more information,
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