

Overview of the Russian IT market for 2022

August 2023



Content

Internet audience	3
Advertising market	7
Video services and music streaming	10
Corporate software, including cloud services	13
Education market	15



Internet audience



👥 Russian Internet audience in 2022

98.6 mn

Average monthly number of Internet users in Russia

81%

Share of the Russian population that uses the Internet

78%

Share of the Russian population that uses the Internet **every day**

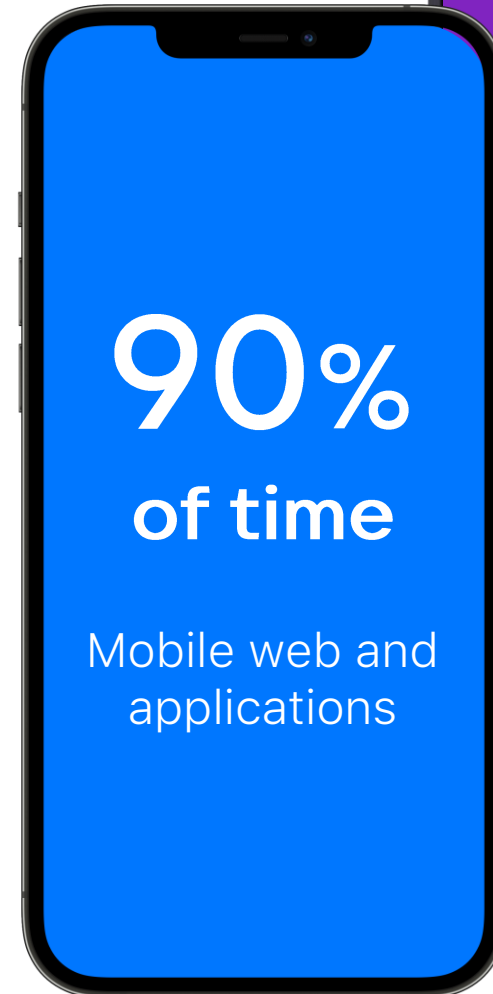
🕒 Online time and Internet consumption

Average time spent by Russian people on the Internet

3 h 26 min



of internet users use mobile Internet



The rest of time

Desktop

⌘ Activities in the Russian Internet

Top categories among online activities¹
% of time spent online

⌘ Social networks

21%

📺 Watching videos

18%

💬 Messengers

15%

🎮 Games

10%

🛒 eCommerce

3%

⌘ Social media

98% of Internet users are registered in some social network²

Top 2 social networks by the number of people registered in them²
% of all Internet users

86%  VKontakte

63%  Odnoklassniki

(1) Source: Mediascope Cross Web (all of Russia, population 12+, Desktop&Mobile, 2022). (2) Source: RAEC, survey of the population of Russia, multiple answers are possible

Advertising market



Media advertising market in Russia

Market segments, RUB bn	2022	Changes, YoY
Radio	14.7	▲5%
Press	4.8	▼41%
Newspapers	2	▼34%
Magazines	2.8	▼45%
Out of Home	47.6	▲6%
Outdoor advertising	41.8	▲9%
Classic advertising media	23.5	0%
Digital advertising media	18.3	▲24%
Transit advertising	4	▼2%
Indoor-advertising	1.8	▼20%
Internet advertising	324.9	▼2%
Media advertising market size (excluding TV advertising*)	392	▼2%

*The volume of TV advertising in 2021 was RUB 197.3 bn

RUB **325** bn ▼2% vs 2021
Online advertising market size in 2022

📣 Interactive advertising market in Russia

Market segments, RUB bn, excl. VAT	2022	Changes, YoY
Media advertising (Branding)	58.0	▼1,6%
Banners	34.0	▲27,0%
Video	24.1	▼26,0%
Performance	265.7	▲0,4%
Search	113.2	▼18,0%
CPX	140.2	▲33,0%
Video	12.3	▼42,0%
Classifieds	98.0	▲40,0%
Retail media	50,0	▲127,0%
Influencers	12,0	—
Messengers	20,0	—
Mobile operators	10,0	—
Audio	0,6	—
Other	5,7	—
Interactive advertising market volume	520	

RUB **324** bn 0% vs 2021

Market size of traditional segments of interactive advertising in 2022

RUB **196** bn

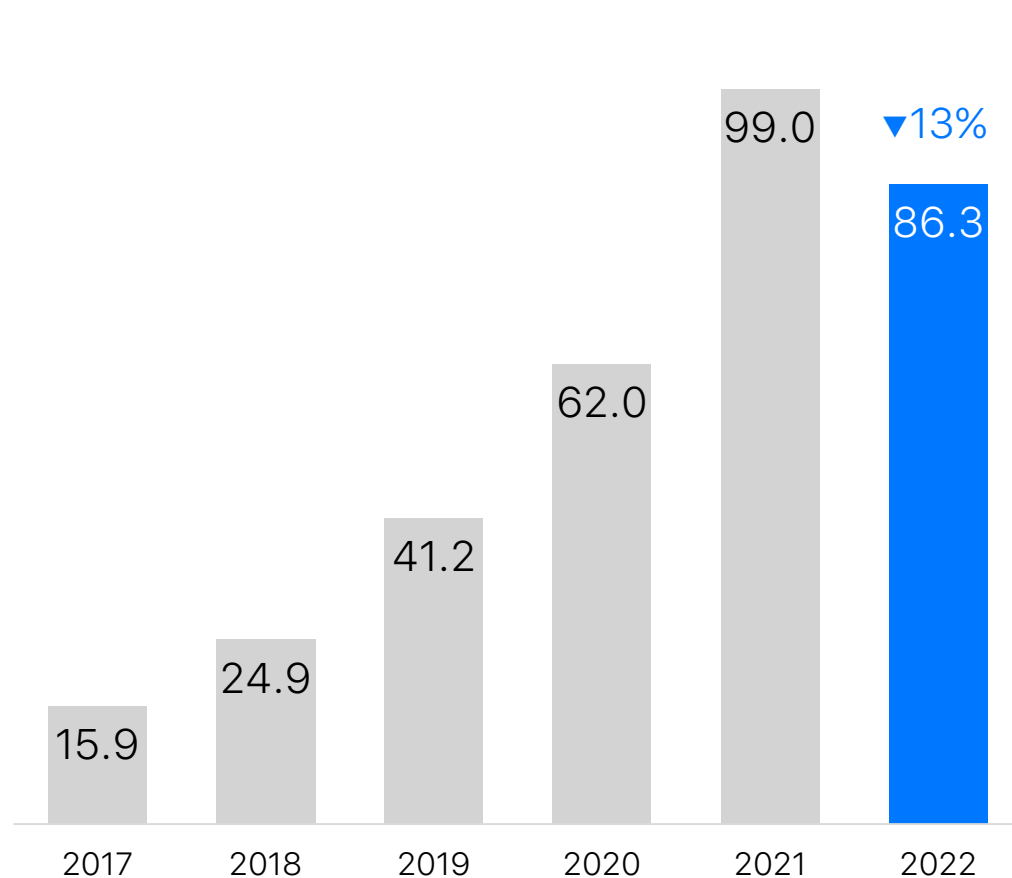
Market size of innovative segments¹ of interactive advertising in 2022

Video services and music streaming

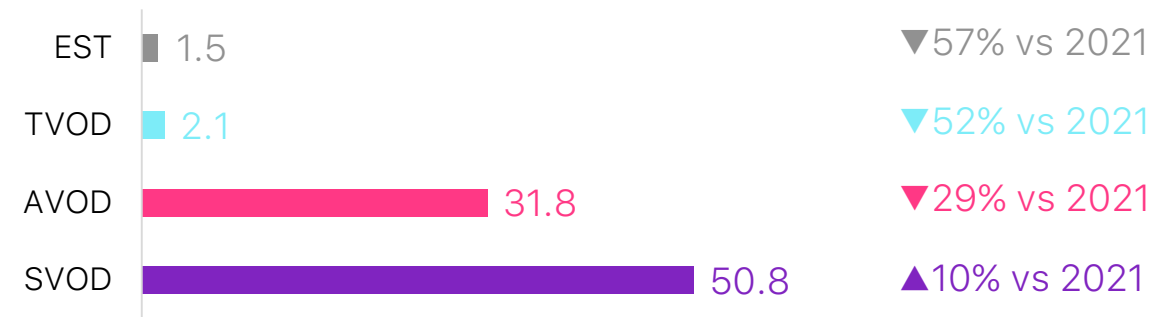


Legal video services market

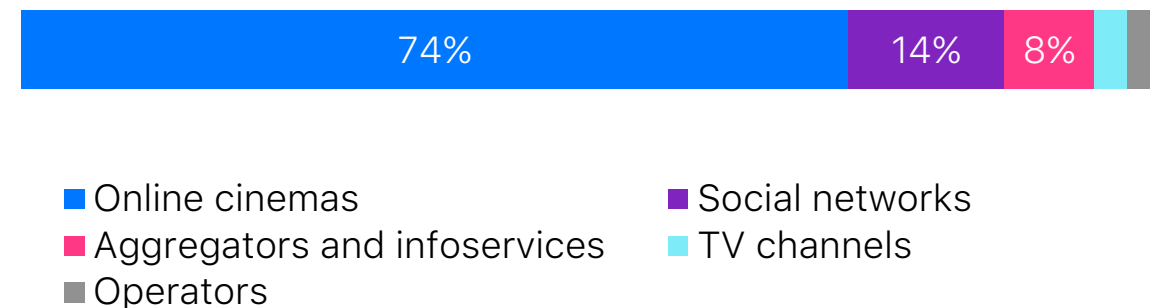
Total revenue
RUB bn (without VAT)



Revenue for 2022 by monetization models
RUB bn (without VAT)

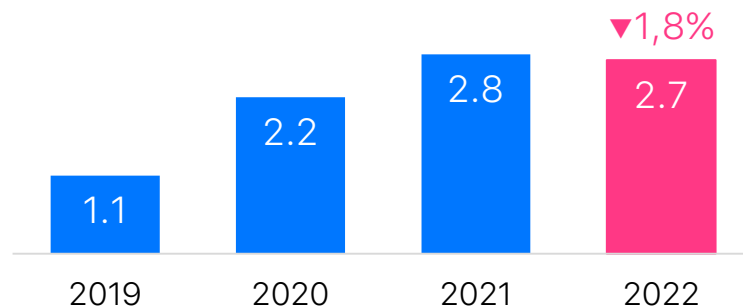


Market revenue structure by segments in 2022
%



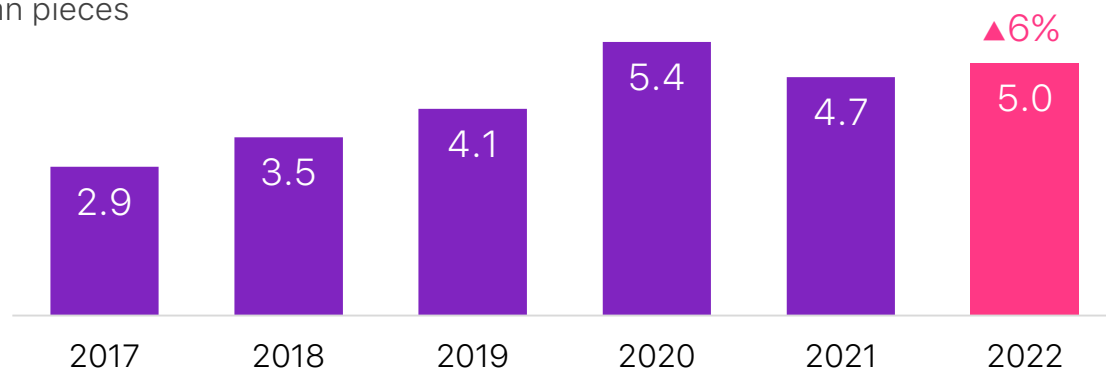
📺 Paid subscriptions

Number of paid subscriptions to video services per user number



📺 Smart TV

Smart TV sales
mn pieces



Source: [J'son & Partners Consulting](#)

🎵 Music

RUB **20** bn

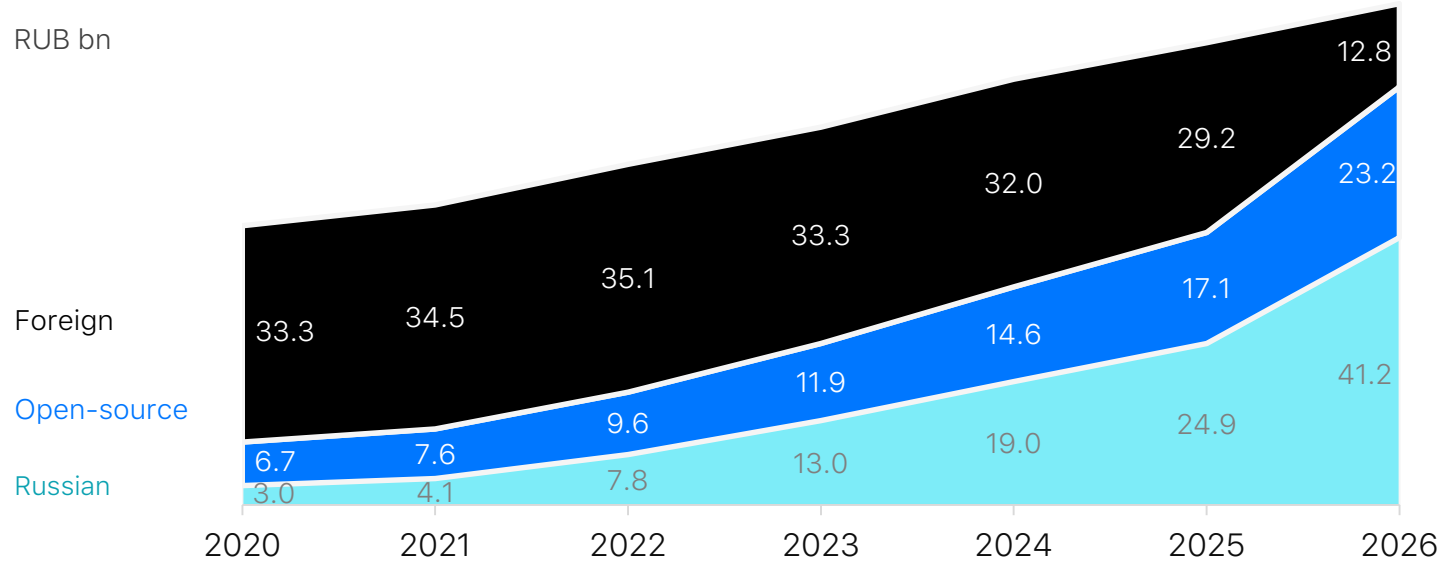
Music streaming market size
estimate for 2022

Source: Company data

Corporate software, including cloud services



Communication services market



Growth of the share of the Russian software

▲ 14x by 2026

▲ 20% - average market growth rate

Share of participants of various business segments buying paid communications software

70% Large business

24% Medium-sized business

4%

1%

Small business Micro business

The main drivers of market development

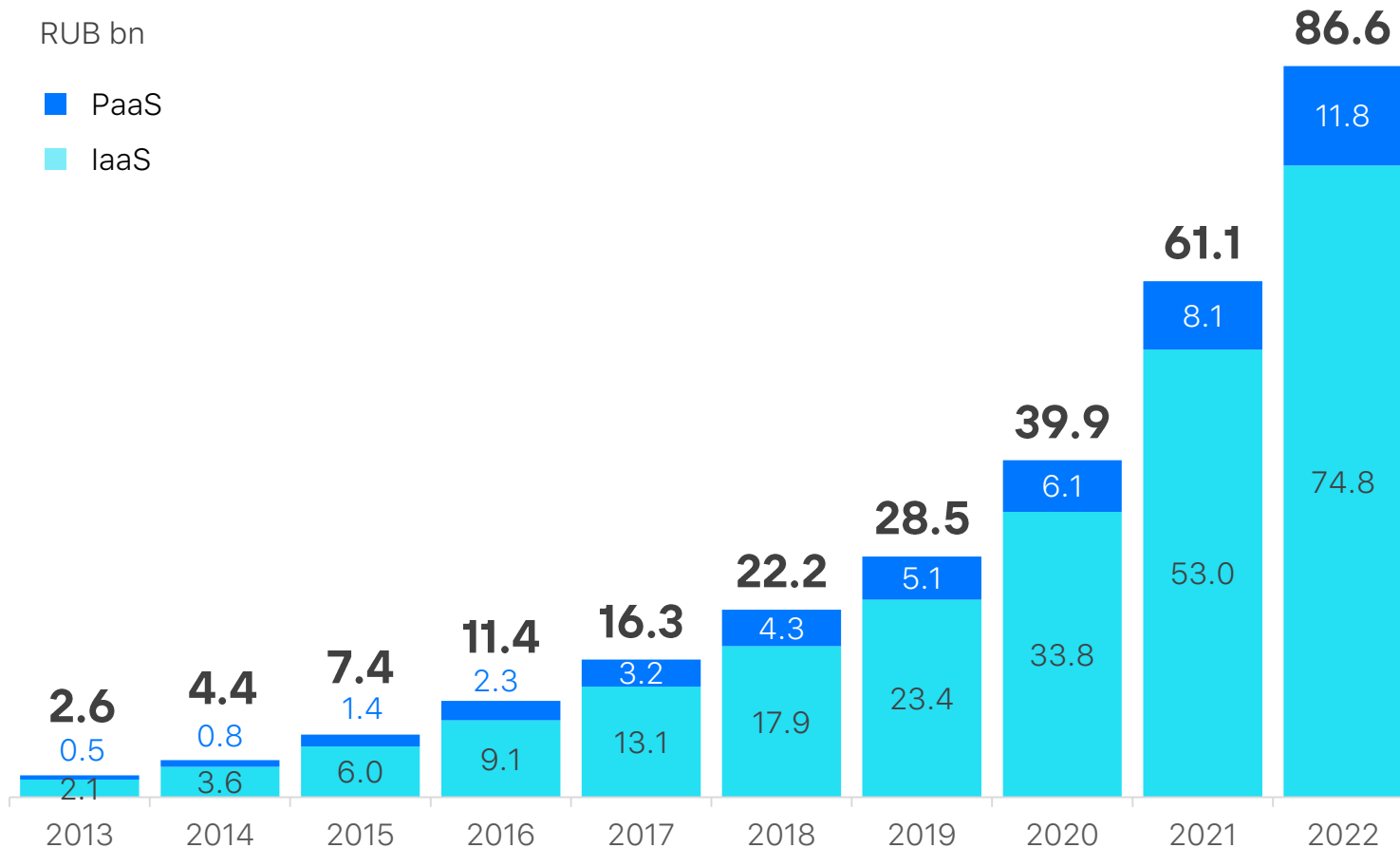
- Strengthening information security requirements
- Growing consumer loyalty to Russian software

Source: Company estimate

☁ Infrastructure and platform cloud services market

RUB bn

■ PaaS
■ IaaS



27%

the annual market growth rate predicted by iKS earlier, with up to 32%¹ growth of individual segments (IaaS) in some years

RUB 238 bn

estimate of the market size of cloud infrastructure services IaaS + PaaS in 2025 (with a current forecast of +40% growth rate)²

(1) Source: [iKS Consulting](#). Data for 2022 are forecast. (2) Company Data

Education market

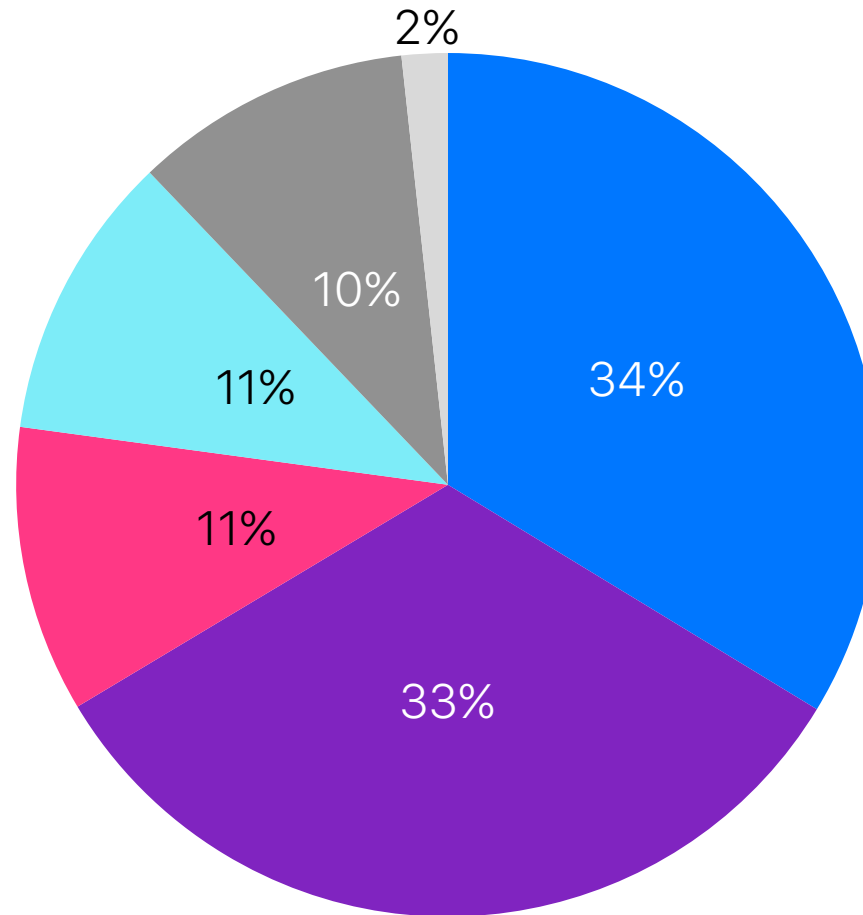


Revenue of educational services in Russia

Revenue of top 100 EdTech companies in 2022

RUB **87** bn

▲18% vs 2021



- Additional professional education
- Children's education
- Platforms and developers
- Business
- Foreign languages
- Soft Skills

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