RMAA

Industry Report Russia & CIS 2024



Russian-Speaking Influencer Marketing Overview

Industry Report Russia & CIS 2024



Introduction

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“The transformative events after 2022 have ushered in a new era for influencer marketing in Russia&CIS, setting it apart from global patterns. The blocking of foreign social platforms has not only altered the digital landscape but also reshaped the dynamics of influencer engagement and content creation. In this White Paper, we delve into the aftermath of these changes, exploring how the transition to Russian social services has impacted both influencers and brands. We aim to provide a comprehensive understanding of the current influencer marketing system in these regions, encompassing detailed social media analytics, profiles of top bloggers, and emerging trends.

The nuances of this unique market present challenges and opportunities. Adapting to the evolving digital ecosystem requires a keen understanding of the local culture and audience preferences. This White Paper is designed to guide global marketers through these complexities, offering insights for navigating the Russian&CIS influencer marketing landscape. Our in-depth analysis covers various aspects, from the rise of new platforms to the shifting preferences of internet users, giving a clear perspective on how to successfully engage with this market.

By understanding these regional specificities, brands can tailor their approaches to resonate more deeply with local audiences.”

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RMAA

RMAA is a cross-border marketing agency dedicated to connecting brands with Russian-speaking audience.

RMAA is a cross-border marketing agency dedicated to connecting brands with Russian-speaking audience. We help navigate cultural, linguistic & media landscape
barriers to deliver your story to the Russophone audience. RMAA connects brands with a global Russian-speaking audience.

Founded in 2008 and based in Moscow, the RMAA marketing agency creates for its clients a detailed and extensive understanding of how to increase sales, improve their marketing techniques, and grow businesses and brands in Russia and the CIS.

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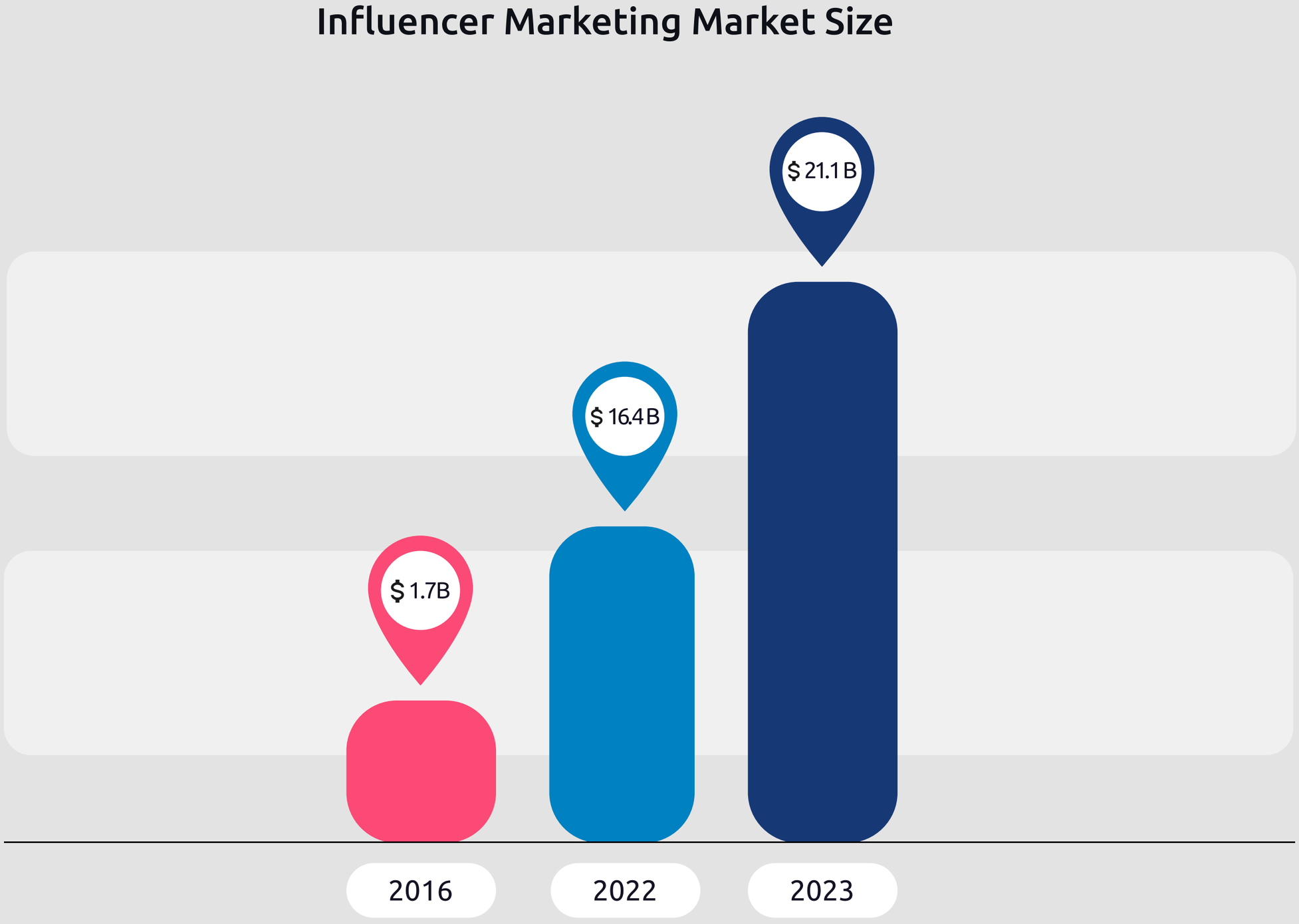
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**Meta Platforms Inc. projects, the activities of which are prohibited in Russia.*

Section 1

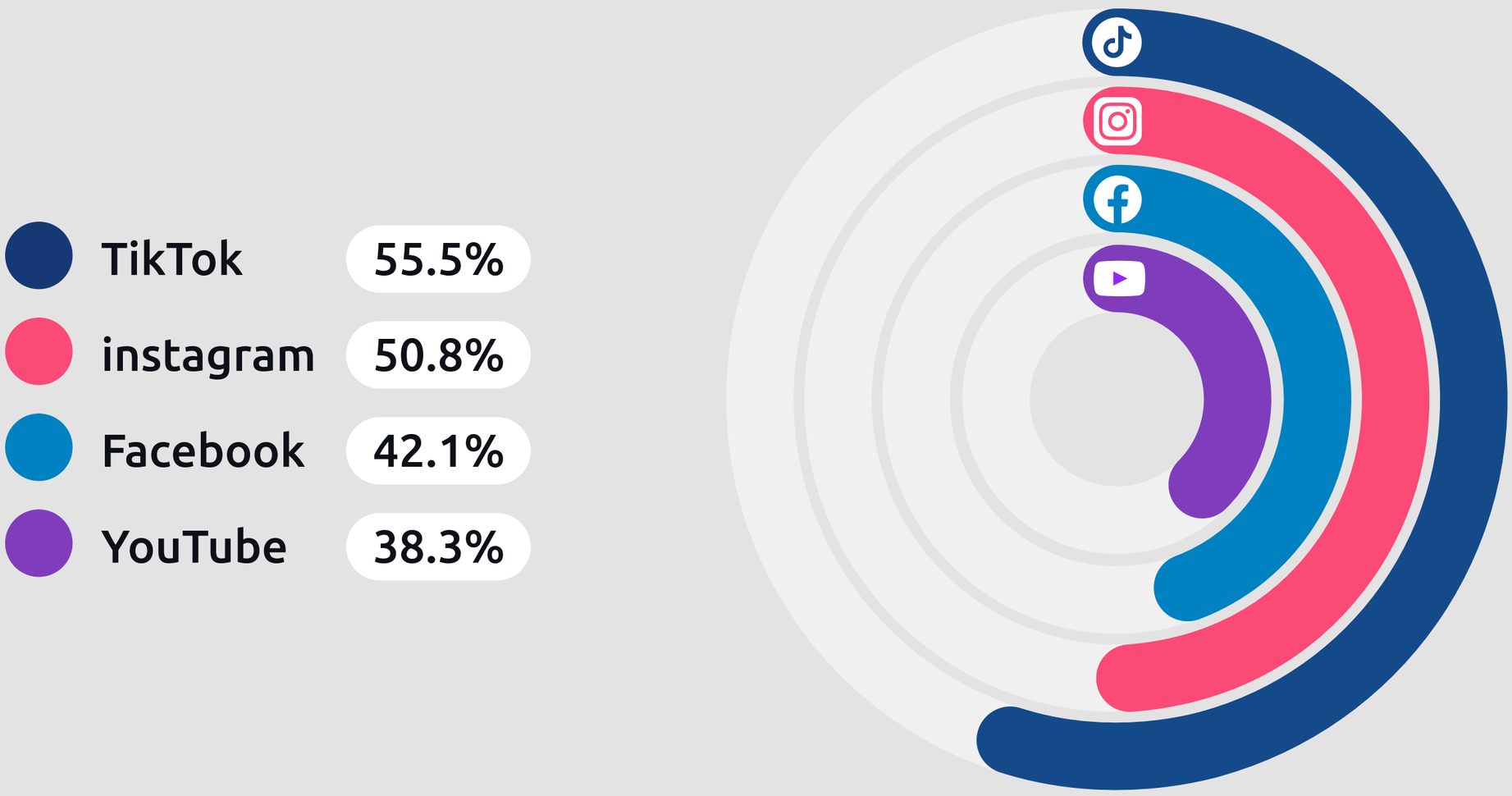
Russian Digital Market Overview

A Global Perspective on the Evolving Influencer Marketing Ecosystem



- Influencer Marketing Industry is set to grow to approximately $21.1 Billion in 2023
- Over 83% of brands still believe influencer marketing to be an effective form of marketing
- 67% business who budget for influencer marketing intend to increase their influencer marketing budget over 2023
- 23% companies intend to spend more than 40% of their entire marketing budget on influencer campaigns

The Most Common Channel Used by Influencer Marketing Brands



- TikTok has come into its own, taking over first place, used by 55.5% of brands tapping into it for influencer marketing campaigns.
- 50.8% of brands go to Instagram when they decide to participate in influencer marketing, dropping it down to second place.
- Surprisingly, Facebook* jumped in popularity as an influencer marketing channel last year, with 50% of brands working with Facebook influencers, although this fell back to 42.1% this year.
- Many of the other social channels have seen reduced usage for influencer marketing compared to last year. For example, 38.3% of the respondents tapped into YouTube for their campaigns (44% last year)

However, in Russia and the CIS, the landscape is changing significantly. This is due to the specifics of the market, audience and resources.

Section 2

Insights into Russia's Influencer Marketing Arena

2.1 Global Russian-Speaking Population: A Comprehensive Numerical Analysis

Population of Russia: ~144 M people
Russian-speakers outside of Russia: ~114 M people



Russian Speaking Market:
Russia + CIS + Worldwide audience ~ **258 M people**

Additionally:

- 227 million unique mobile connections were active in Russia
- Over 75% of the population lives in urban centers
- Over 42% of the population are between 25 and 54 years old
- The average age of Russia's population is 39.2
- The median mobile internet connection speed is 21.73 Mbps, and the median fixed internet connection speed sits at 74.92 Mbps

Population	Connecting to mobile	Internet users	Social media users
144.2 million	219.8 million	130.4 million	106.0 million

In 2023, an impressive 88.2% of Russia's population, amounting to 127.5 million people, were online. However, it's essential to recognize that this figure doesn't fully represent the global Russian-speaking online community. Thanks to the Soviet Union's historical influence, significant Russian-speaking communities exist in neighboring countries such as Belarus, Kazakhstan, Uzbekistan, and the Baltic states.

Moreover, the Russian-speaking diaspora extends globally, with substantial populations in the United States, Germany, the broader European Union, Israel, Canada, and Australia. Additionally, reports suggest that over a million Russians have relocated since 2022.

Determining the exact size of the worldwide Russian-speaking audience is a complex task, but it undoubtedly encompasses tens of millions of people across all continents. Including Russia's population, the total number reaches as high as 258 million. This vast and dispersed audience presents a lucrative opportunity for the promotion of products and services.

It's important to note that the term 'Russian-speaking population' encompasses both native Russian speakers and those fluent in Russian as a second language. This demographic is diverse, including various ethnicities and nationalities, and is far from being homogeneous.

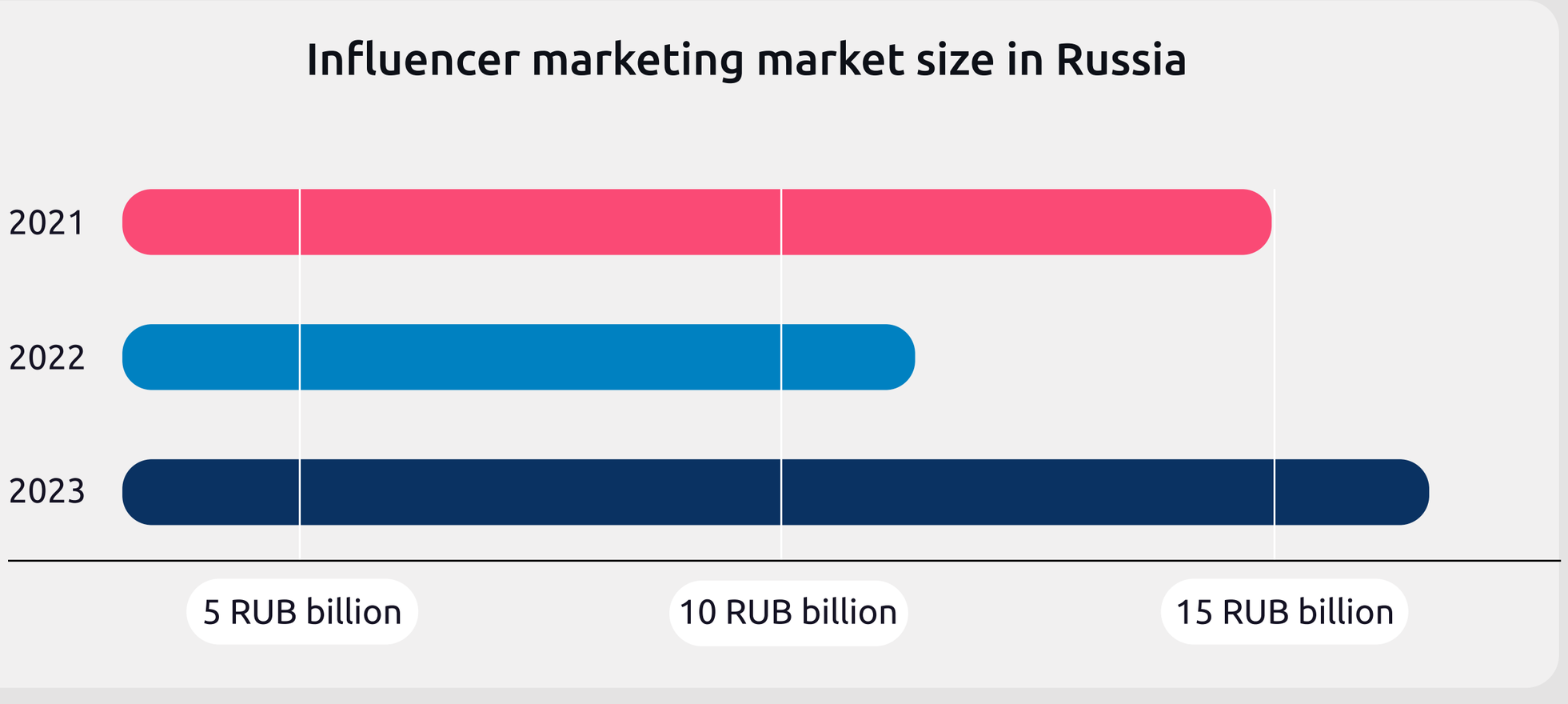
It is the most widely spoken of the Slavic languages, with over 258 million total **speakers** worldwide. **Russian** is the seventh-most spoken **language in the world** by number of native **speakers** and the eighth-most spoken **language in the world** by total number of **speakers**

2.2 Assessing the Volume of Russia's Influencer Marketing Industry

Despite facing numerous challenges, including the Instagram* blocked, TikTok's shutdown, the halt of YouTube monetization, the exit of Europe brands, and shifts in advertising laws, the market has successfully adapted to these transformations.

In 2023, Russian domestic social networks held a majority share of 56%, surpassing their foreign counterparts. The landscape saw an expansion in the number of players, with the segment growing to include 63 entities, 28 of which are local platforms.

Thinking ahead, the expectation isn't merely a rebound to the previous growth rates of 150-200% per year, but rather a substantial surpassing of these figures. This optimism underscores the market's resilience and adaptability in the face of significant disruptions.



15,75 RUB billion

market size of the influencer marketing and native advertising market

1.5 - 2.5 time higher

growth in the number of advertising integrations with bloggers

2.3 Russia and the World: Key Variances in Digital Ecosystems

The 2022 was marked by dramatic changes in the Internet advertising industry in Russia:

No Ads

Google does not show advertising in Russia on its resources (search engine, YouTube, etc.).

Restrictions

TikTok introduced restrictions for Russian users: it is not possible to post new content or run ads.

Blocked

The popular social networks Facebook* and Instagram*, which also served as advertising channels, are blocked in Russia.

Popular platforms

The popular social networks Facebook* and Instagram*, which also served as advertising channels, are blocked in Russia.

Changes in the digital ecosystem have had a global impact on the structure of advertisers' budgets and on the work of companies and professionals providing internet marketing services.

Section 3

Russian Social Media Landscape and Blogger Influence

YouTube has emerged as the frontrunner in average monthly audience reach in Russia, underscoring the escalating popularity of video content in the digital marketing landscape.

VKontakte witnessed a 10% surge in its user base, reaching 85 million by the third quarter of 2023.

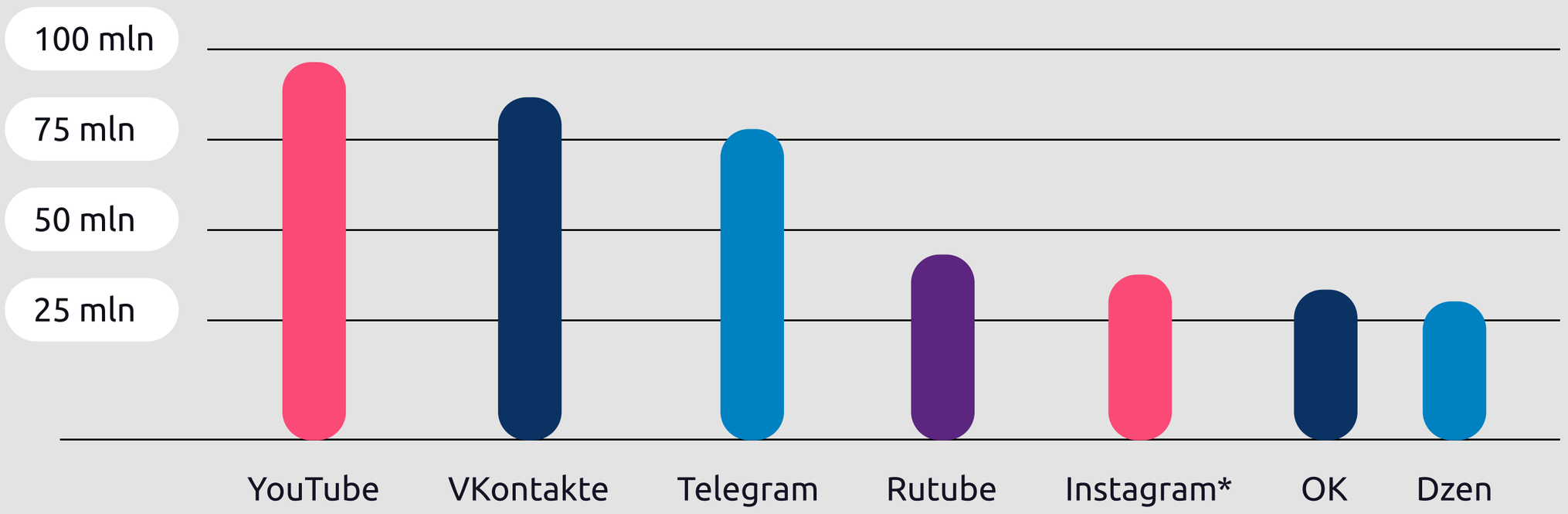
Telegram ranks among the top three, with both its monthly and daily audience reach expanding steadily.

Rutube, Russia's counterpart to YouTube, is experiencing growth driven by the partial migration of bloggers to the platform and the creation of exclusive content, which is capturing audience interest.

Despite being blocked, Instagram* continues to be used by the audience, although its share of total users in Russia has significantly diminished post-blocked.

The Russian social networks Odnoklassniki (part of the VKontakte holding) and Dzen (owned by Yandex), which cater to an older and more affluent audience, are also demonstrating strong performance.

Average monthly audience reach by platforms operating in Russia, 2023



3.1 How YouTube became Russia's leading platform

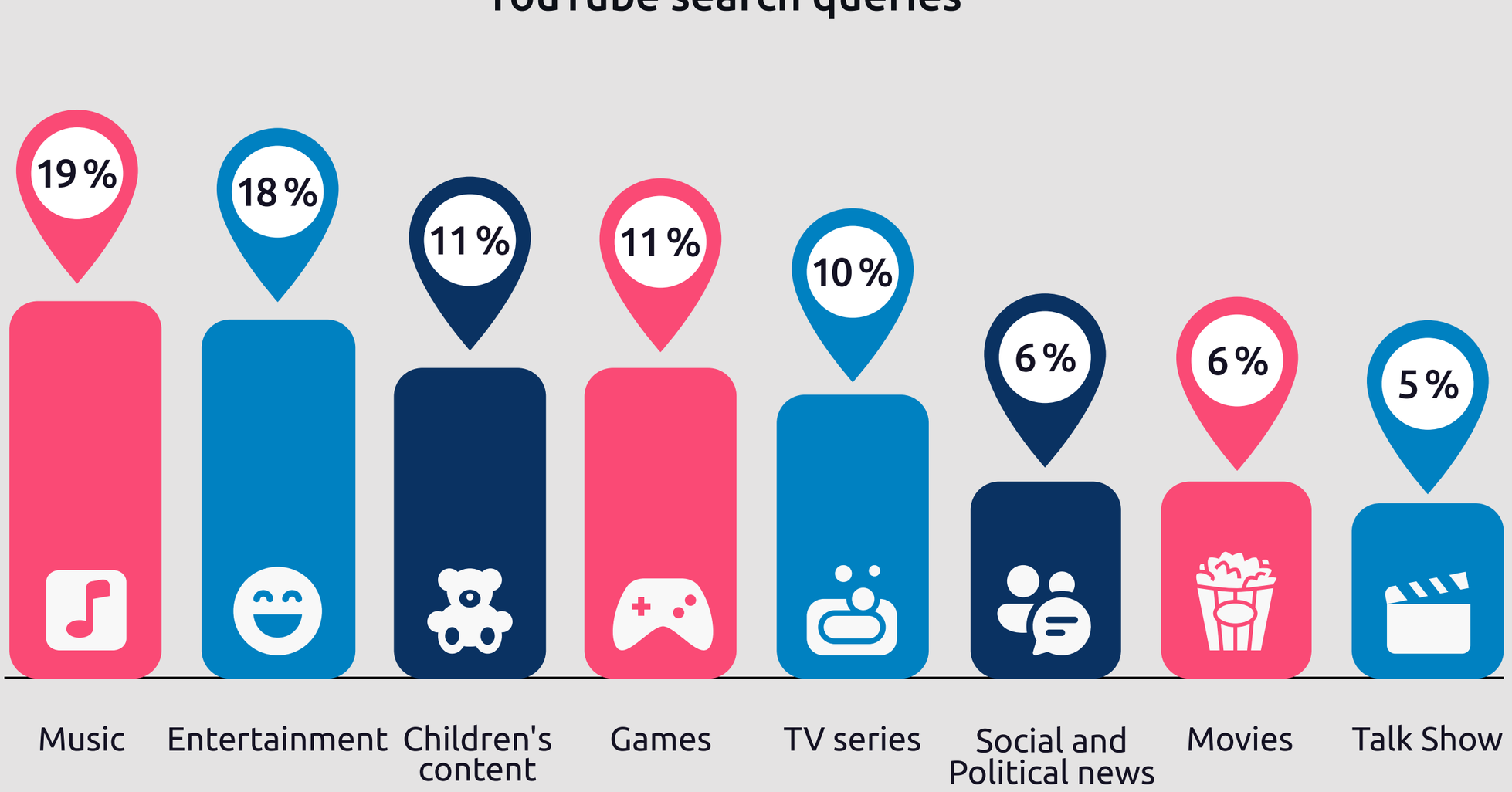
The monthly reach of the YouTube Russian audience is 94.78 million people.

According to Similarweb, 5.2% of the global YouTube traffic comes from Russia.

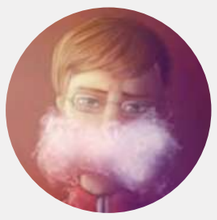
On average, 42.9% of Russians watch YouTube videos every day.

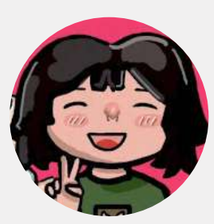
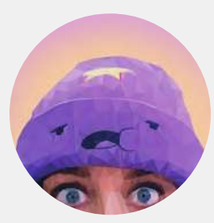
Russians spend about 86 minutes a day watching YouTube videos.

The most frequently searched for content on Russian YouTube topics are Music (19%), Entertainment (18%), Children's content (11%), Games (11%), and TV series (10%).



TOP-20 Russian YouTube Channels

Channel	SM Influence
 1. A4	994
 2. Marmok	941
 3. TheBrianMaps	926
 4. Litvin	891
 5. EdisonPts	881
 6. Kuplinov Play	873
 7. MrLololoshka	868
 8. Egorik	852
 9. windy31	850
 10. vanzai	849

Channel	SM Influence
 11. Dima Maslennikov	845
 12. ExileShow	839
 13. Anastasiz	837
 14. Glent	836
 15. Ildar Auto-Select	833
 16. Kompot	830
 17. Simbochka Pimbochka	809
 18. HiMan	808
 19. TheKateClapp	803
 20. sndk	800

*SM Influence is an index of social media influence. The index takes into account the total engagement of a YouTube channel and the number of publications per year. The index is distributed on a scale and ranges from 0 to 1000 points.
*Research period: 01 January - 11 December 2023.

In Russia, YouTube has faced significant challenges, including a complete ban on monetization for local channels, yet this has not deterred the collaboration between brands and content creators. They quickly adapted to these changes by shifting towards organic, paid promotions and initiating direct interactions with each other. The landscape is rich with a variety of channel ratings, from subscriber counts to view numbers. However, the SM Influence index by Medialogy provides a more accurate reflection of the real state of influencer engagement on YouTube in Russia.

Previously, channel selection heavily relied on thematic relevance, but the trend has shifted towards a more universal approach. Successful integration now depends on a multitude of factors, including the creator's personality, the interactive and engaging presentation of advertisements, consistent content output, and metrics like subscriber and view counts.

The dominant number of channels contains colourful, interactive content in the format of Challenges, ironic situations, horror stories, crazy science experiments, etc. In addition, game topics. Mostly, these are channels dedicated to the game of Minecraft (EdisonPts, Kuplinov Play, MrLololoshka, windy31, GLENT, Kompot).

The first place is occupied by blogger Vlad Paper and his channel A4. The author has been included in many Russian youtube ratings since 2016. Vlad shoots videos of different popular formats, ranging from horror stories to Challenges. For several years of popularity A4 has turned into a full-fledged brand, which is no longer limited to YouTube (note - the author owns a food brand Lava-Lava and online shop A4 Shop thematically close to the style of A4 channel).

Among the list there are 2 newcomers included in Forbes rating "Successful young people under 30 years old". Anastasia Burchuladze (note - Anastasiz channel, 13th place in the rating) is known for her conversational videos about life, music videos and collaborations with other video bloggers. The blogger's audience has already exceeded 6 million subscribers. Another one is Ilya Yatskevich (note - ExileShow channel, 12th place in the rating), who is developing an account on Twitch. The author creates music live and talks about his life. At the same time, the videos on YouTube are released constantly, gathering more than 3 million views.

The YouTube landscape in Russia showcases a dynamic mix of established influencers who maintain their popularity and new, promising talents emerging on the scene. Brands often find themselves choosing less popular channels due to budget constraints or the need for niche-specific content, highlighting the importance of a personalized approach to influencer campaigns in navigating the diverse and evolving Russian YouTube ecosystem.

3.2 VKontakte's Commitment to Author Diversity and Support

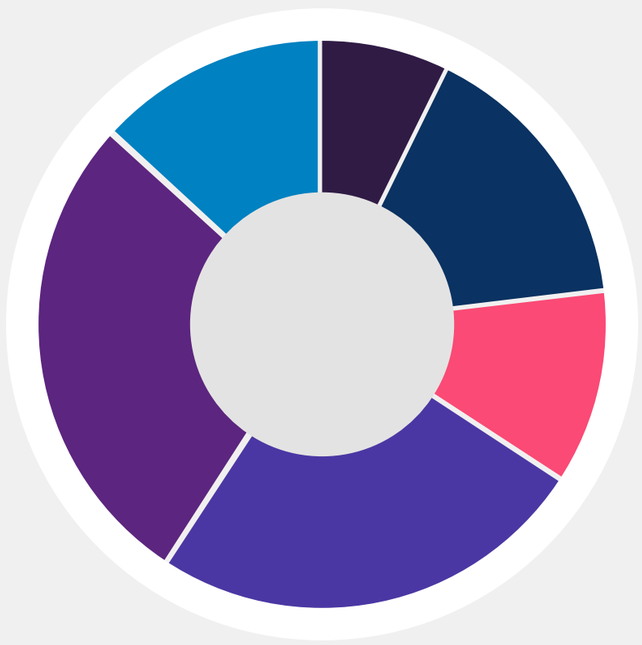
VKontakte 2024

- **Audience:** 89 million users per month, 54.6 million people daily
- **Users watch** 2.41 billion videos daily
- **Popular countries:** Russia, Belarus, Kazakhstan
- **Demographics:** 62% women and 38% men
- **Age:** 25-44

VKontakte opportunities for bloggers

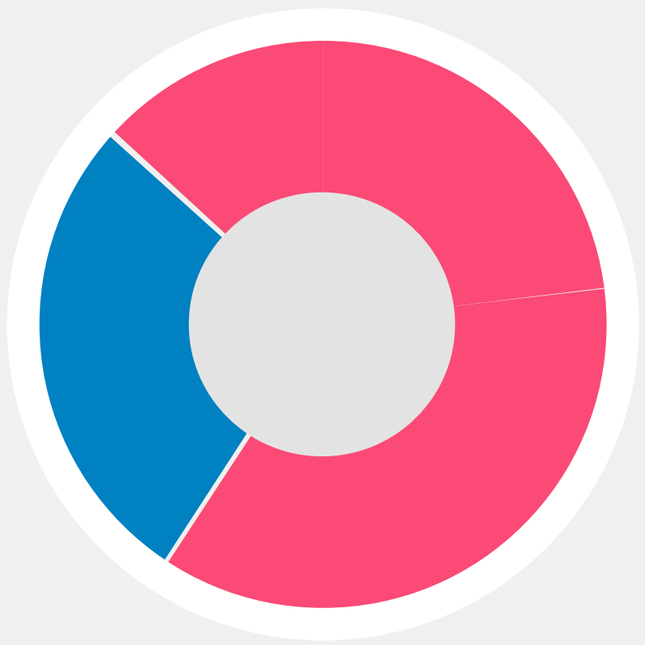
25 569 032 authors

426 485 649 posts



Distribution by age:

- up to 18
- 18-24
- 55+
- 25-34
- 35-44
- 45-54



Distribution by gender:

- male
- female

Smart Feed is similar to the Instagram* "Recommendations" and selects users to show content based on their interests. It is an organic tool that uses artificial intelligence algorithms.

VK Clip is a short video in a vertical format. The content gathers over 200 million views daily. A bonus for authors with 10+ thousand users is the ability to embed an advertisement in the clip and earn revenue from it.

The live stream has advanced advertising functionality. The author can add a link, products or a poll during the broadcast. In addition, viewers can support the blogger financially through a special button.

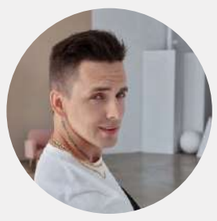
Stories have a vertical format that disappears 24 hours after publication.

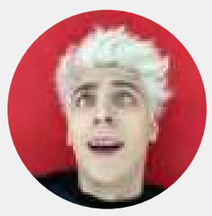
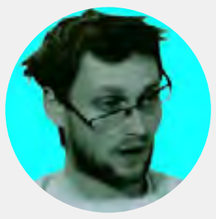
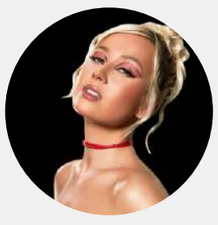
Targeted advertising is a paid promotion in all VKontakte channels for communities, products, services, websites and mobile applications. Campaigns are launched through the VK-Ads advertising platform.

The Clipper Support Programme is designed for bloggers who actively use VK Clips. Authors with the highest number of views have a chance to get a prize fund of 100 million rubles.

VK Donut has a paid subscription to exclusive content.

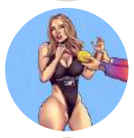
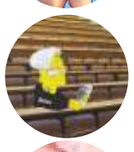
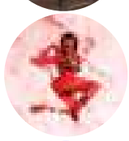
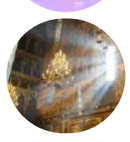
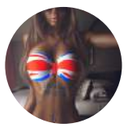
TOP-20 VKontakte Bloggers

Blogger	SM Influence
 1. veydi_rush	811
 2. Kara_kross	792
 3. Dasha Doshik	790
 4. Valya Karnaval	786
 5. Dmitry Maslennikov	783
 6. Samchuk_studio	780
 7. tenderlybae	777
 8. Gavrilina	771
 9. Annya Pokrov	769
 10. Brian's band	765

Blogger	SM Influence
 11. A4	759
 12. Milana Khametova	747
 13. Kukoyaki	738
 14. Kuplinov Play	736
 15. Litvin	727
 16. Exile	720
 17. Arseniy Popov	715
 18. Edison Family	698
 19. Klava Coka	698
 20. Danya Milohin	692

*SM Influence is an index of social media influence. The index takes into account the total engagement of a VK Account and the number of publications per year. The index is distributed on a scale and ranges from 0 to 1000 points.
*Survey period: 01 January - 17 December 2023.

TOP-20 VKontakte Publics

	Public name	Audience	Comments	Likes	Reposts	Engagement
	1. Rhymes and punches	5 274 819	121 541	6 834 221	1 992 251	8 948 013
	2. Leonardo Dayvinchik	15 706 171	172 079	6 235 831	636 804	7 044 714
	3. Oatmeal, sir!	5 449 655	63 728	4 966 815	875 307	5 905 850
	4. SWT	3 062 416	43 919	5 158 664	326 754	5 529 337
	5. VPS	2 345 897	29 288	4 324 890	714 060	5 068 238
	6. Pikaby	3 198 534	0	2 535 057	755 321	3 290 378
	7. Believe Orthodoxy	2 027 226	0	2 990 069	252 621	3 242 690
	8. Topor storage	4 582 632	187 237	1 360 870	1 314 693	2 862 800
	9. MDK	12 017 402	108 256	1 300 139	1 207 745	2 616 140
	10. Netflix	1 954 281	0	2 290 091	269 316	2 559 407
	11. CB	1 466 071	44 172	2 044 920	445 541	2 534 633
	12. Sarcasm	3 300 671	22 262	1 646 665	738 058	2 406 985
	13. Marvel/DC	3 202 742	0	1 980 657	305 109	2 285 766
	14. Match TV	2 904 774	56 016	1 999 206	151 930	2 207 152
	15. Pozor	4 713 155	5 558	1 871 279	286 394	2 163 231
	16. Borscht	7 105 867	83 315	1 000 383	1 064 304	2 148 002
	17. Overheard - They're talking about you	4 067 882	28 710	1 870 660	207 785	2 107 155
	18. YEP	10 191 341	0	1 313 859	681 780	1 995 639
	19. IGM	4 225 622	82 029	1 294 181	520 884	1 897 094
	20. Lepra	5 092 988	0	1 036 636	860 399	1 897 035

Most authors and publics of VKontakte have a core emphasis on entertainment content, which significantly shapes the influencer marketing landscape on the platform. This focus is characterized by:

High User Engagement. Entertainment content, known for its engaging and often viral nature, resonates well with the VKontakte audience. Influencers who create content in this genre tend to have higher levels of engagement, making them attractive partners for brands. This is especially evident in the top communities of Rhymes and Pants, Leonardo Daivinchik, Ovsyanka, Sir!, which have been leading the VKontakte ratings for several years.

Creative Freedom. The entertainment genre offers content creators a broad canvas for creativity. This freedom allows influencers to experiment with various themes, from humor and music to gaming and lifestyle, catering to a wide range of interests among their audience. VKontakte's variety of formats only increases the experimental ground.

Brand Integration. Entertainment content provides unique opportunities for seamless brand integration. Influencers can incorporate products or services into their content in a way that feels natural and engaging, enhancing the effectiveness of marketing messages.

Trend-Driven Content. Influencer marketing in this space is often driven by current trends and pop culture, making it essential for influencers and brands to stay up-to-date with the latest developments. This dynamic nature keeps content fresh and relevant.

Cross-Platform Promotion. Entertainment content on VKontakte often complements cross-platform promotional strategies. Influencers might use VKontakte in conjunction with other platforms, like YouTube or Instagram, to maximize their reach and impact. YouTube leader Vlad Bumaga, as well as Karina Kross, Dasha Doshik, Valya Karnaval, Brian, Exile, tenderlybae, Dmitry Maslennikov, Anya Pokrov, and others - all of them have at least three accounts in different social networks. Plus, their YouTube channels have 1 million subscribers or more.

Community Building. Influencers focusing on entertainment content are particularly adept at building strong communities. These communities are not just audiences but active participants who contribute to the content creation process, often through comments, shares, and collaborations.

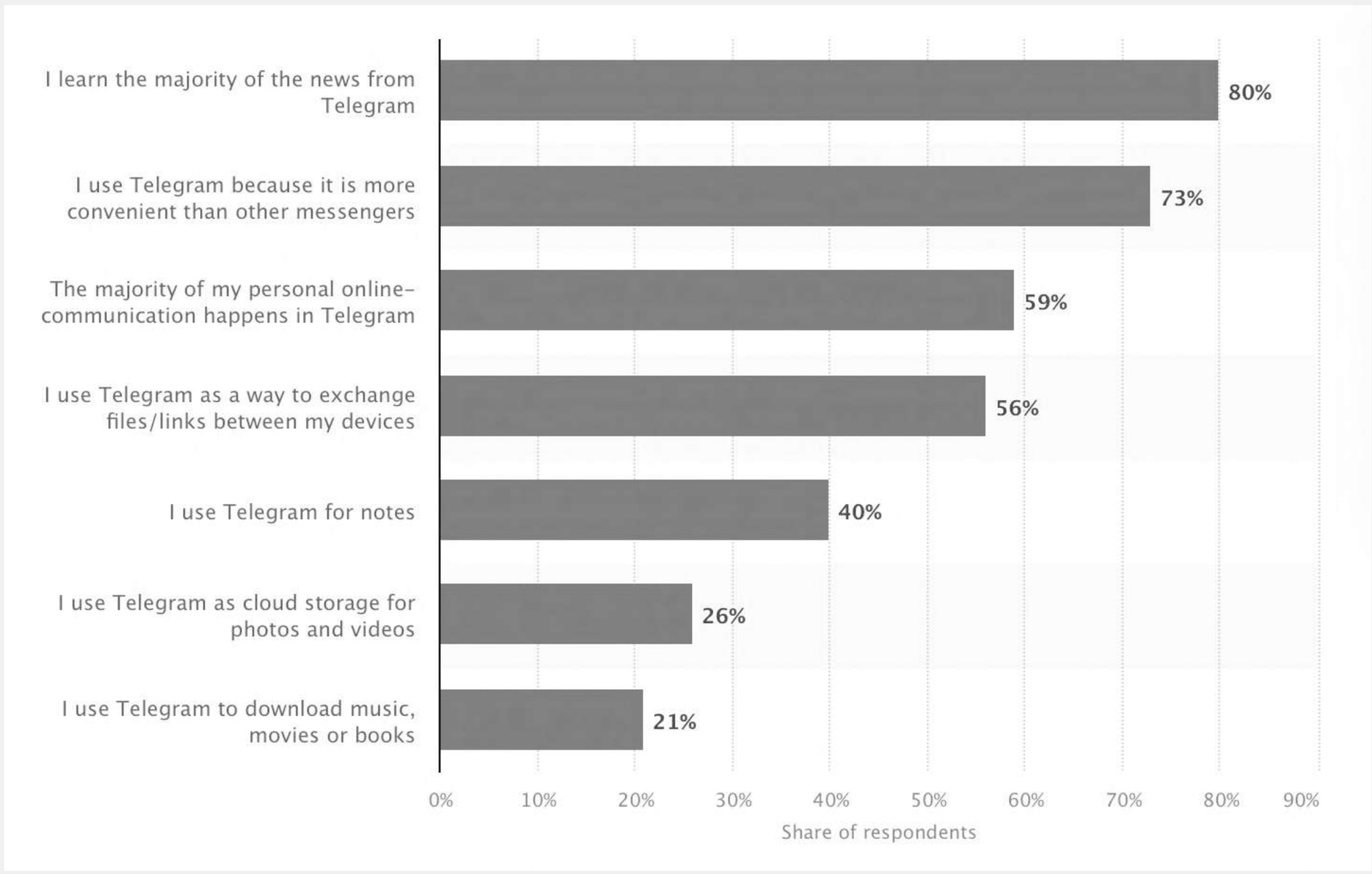
3.3 Promotion in Telegram and its specifics



Telegram 2024

- **Audience:** 800 million users per month
- **World ranking:** 8th place (social media)
- **Users spend** an average of 3 hours and 57 minutes a month in the messenge
- **In Russia,** Telegram messenger is used by 45.8% of the population on a daily basis
- The most frequent users of Telegram are from the regions of Moscow (31.33%), St. Petersburg (12.59%) and Moscow Region (4.34%)
- **Demographics:** 58% men and 42% women
- **Age:** 25-34

Why do you use Telegram?



Every fourth Telegram user is subscribed to more than 50 Telegram channels. Over a half of the audience regularly read up to 10 channels

A Telegram channel can be in the format of a blog of a popular author, news or thematic media, brand. In the last two cases, there is no personalisation. However, this has no effect on users in terms of promotion, since the main difference between Telegram and other social networks is the news character of information presentation, mainly in text/textual/graphic form.

TOP-20 Telegram Channels

	Channel	Name	Audience, ths.,	Average number of views per post, ths.
	1. @medvedev_telegram	Dmitry Medvedev	1 101,4	1 219,6
	2. @vv_volodin	Vyacheslav Volodin	1 124,8	2 198,3
	3. @yurasumyyurasumy	The World Today with Yuri Podolyaka	2 707,6	1 773,4
	4. @alfabank	Alfa Bank	671,2	1 230,5
	5. @kuplinov_telegram	Kuplinov Play	796,3	1 142,1
	6. @a4omg	Vlad Paper A4	768,8	1 125,0
	7. @litvintm	LITVIN	1 441,2	1 093,3
	8. @Топор18	Topor 18+	7 579,9	1 024,8
	9. @aleksandr_skif	Alexander Khodakovsky	574,7	934,5
	10. @br1anm7ps	Broen lives here	673,3	854,5
	11. @maslennikovliga	Dima Maslennikov Blogger	1 159,9	838,3
	12. @readovkanews	Readovka	2 312,7	830,3
	13. @breakingmash	MASH	2 138,9	807,0
	14. @rian_ru	RIA News	2 947,1	778,1
	15. @rkadyrov_95	Kadyrov_95	2 116,3	720,0
	16. @moscowmap	Moscow News	1 919,1	713,3
	17. @mrs_druzhinina	Irina Druzhinina	1 154,9	685,6
	18. @mpartisans_news	Live	4 126,3	666,5
	19. @gosuslugi	Gosuslugi	1 051,9	645,1
	20. @ТопорLife	Topor Live	4 757,9	618,5

*Survey period: 01 January - 17 December 2023.

Paid Promotion through Telegram Ads

This platform is often advertised on by major brands who usually work with agencies and follow 'established' approaches to achieve their goals when selling ads on Telegram.

Sponsored messages on Telegram are displayed in large public one-to-many channels with 1000+ subscribers and are limited to 160 characters. Sponsored Messages are based solely on the topic of the public channels in which they are shown.

This means that no user data is obtained or analyzed to display ads, and every user viewing a particular channel on Telegram sees the same sponsored messages.

Advertisers can choose the language and approximate topics of channels where their ads will be displayed. It is also possible to choose specific channels where a certain ad will be shown – or add specific channels where it will not be displayed.

This allows advertisers to serve precise and efficient ads while preserving user privacy.

Adverts are marked with the word 'Advertisement' at the beginning of the post and are located at the bottom of the channel's news feed. They may also contain a button to go to the advertised source.

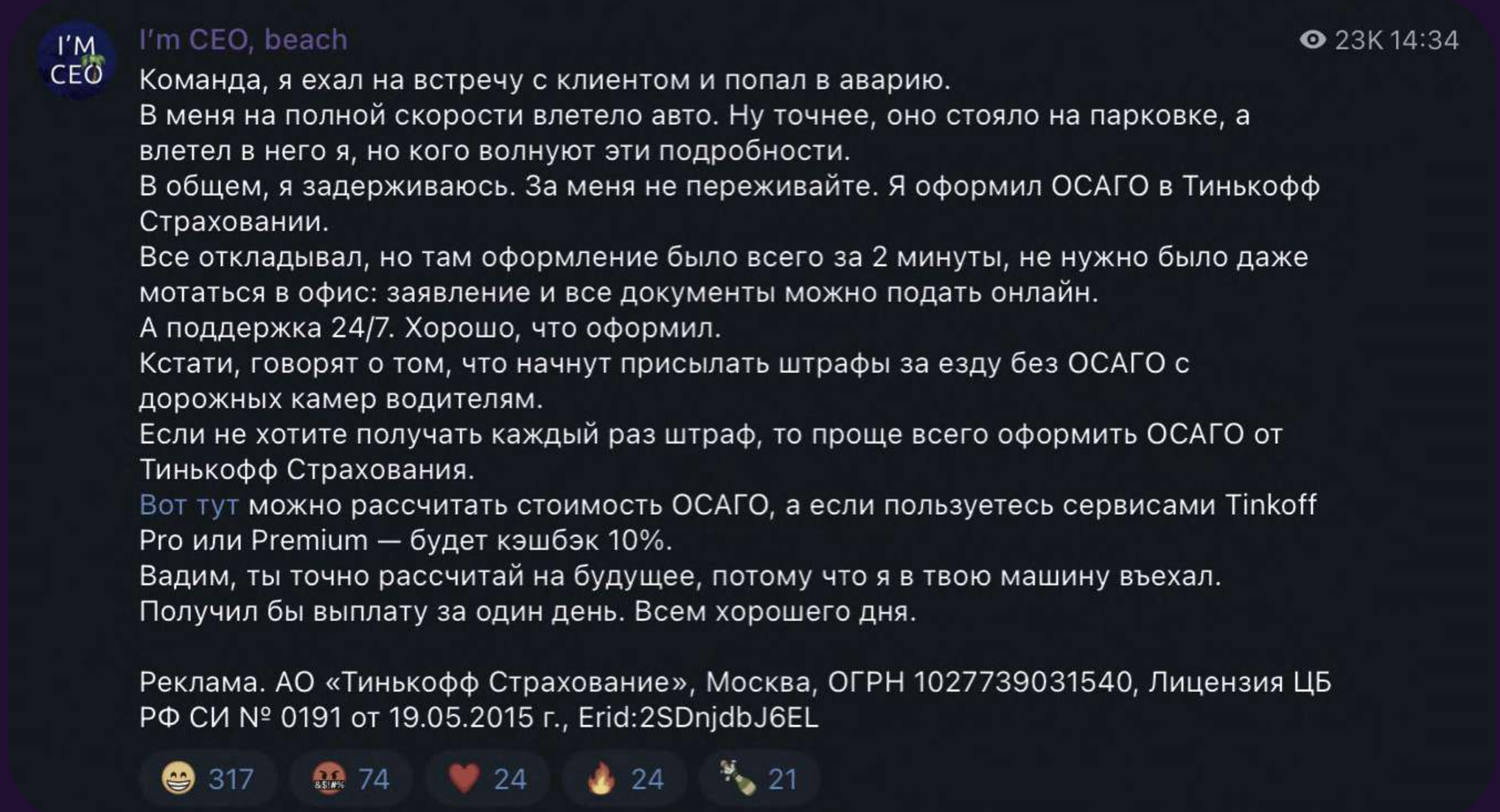


Telegram Seedings

This involves direct cooperation between advertisers and administrators of public channels or chat rooms. In this case, the advertiser pays for the placement of their offer in the publications of the channels. This approach allows them more flexibility in selecting channels that have the audience most suitable for their product or service. Payment for unofficial promotion is usually made directly to the channel owners.

Identifying the target audience is important. In some cases the target may be clear, but in others a deeper analysis is required. Telemetr, Telega.in and TGStat provide a list of channels based on topic, format and number of subscribers. The top channels in the chosen field have more visibility, but they can be more expensive to promote on.

An advertising publication may contain text and graphics plus a button or link to go to the promoted site.

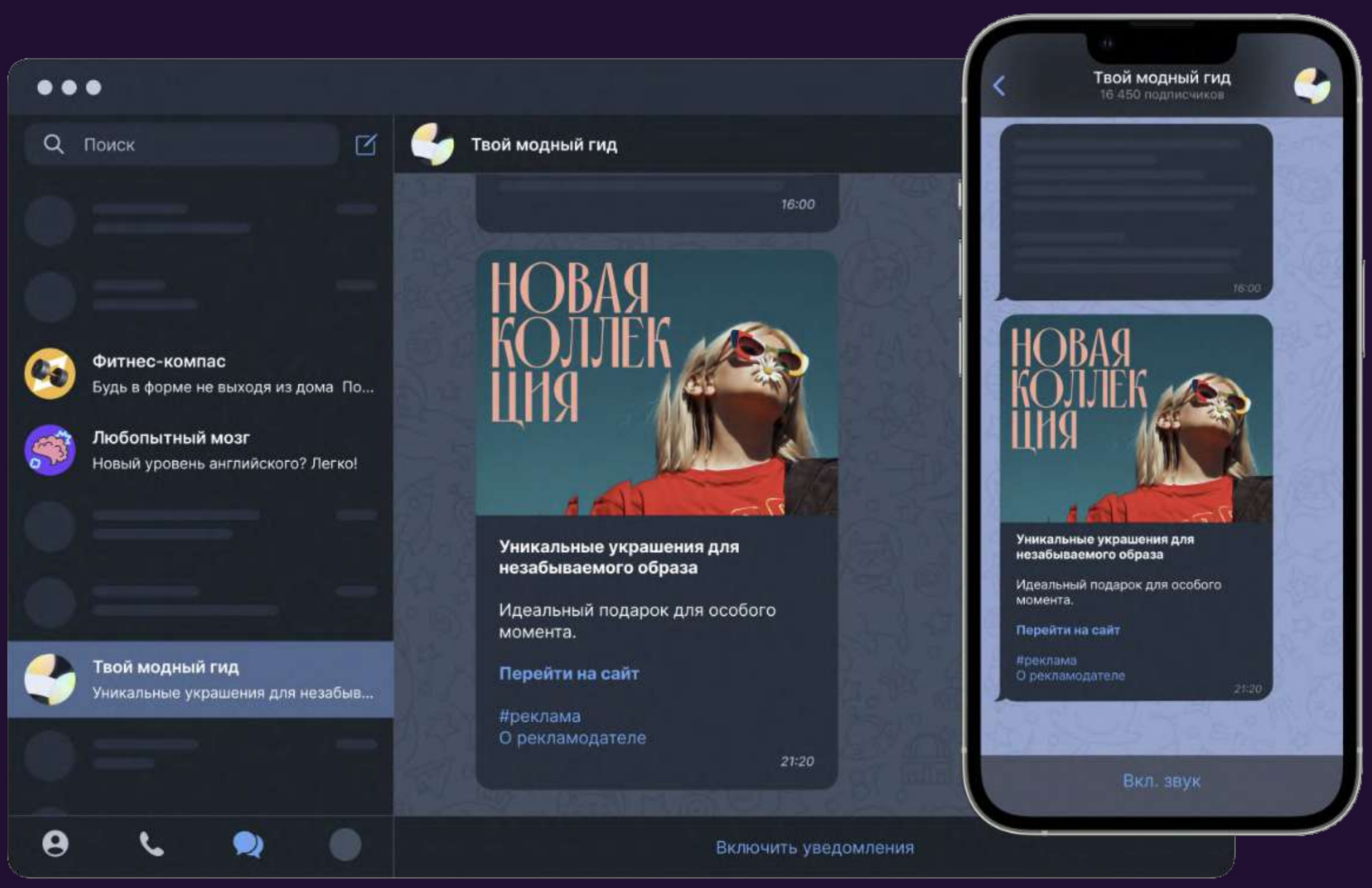


Contextual advertising in Telegram channels via Yandex.Direct

Telegram channels have emerged as a novel and captivating platform for advertising through Yandex.Direct. These advertisements integrate seamlessly into the feeds of public Telegram channels, which are part of the Yandex Advertising Network. This innovative advertising approach is currently exclusive to Russia.

Each ad integrates seamlessly into the channel's flow, resembling a standard post, and includes:

- A captivating image or video clip.
- An engaging, clickable headline coupled with a link directing to the advertiser's website.
- The advertising copy itself.
- A distinct label identifying the content as an advertisement.
- A reference link offering more information about the advertiser. To enhance these adverts, additional components like age-appropriate tags or disclaimers can be incorporated.



Source: https://www.realweb.ru/research/01.pdf

In the dynamic world of Telegram influencer marketing, three primary objectives stand out: cultivating brand awareness, pinpointing a specific target audience, and fostering trust. A glance at Telegram's top-rated channels reveals a diverse mix, including Russian brand channels like Alfa Bank, renowned YouTube personalities such as Vlad Bumaga and Dima Maslennikov, influential political figures including Dmitry Medvedev and Ramzan Kadyrov, along with prominent news outlets like RIA Novosti.

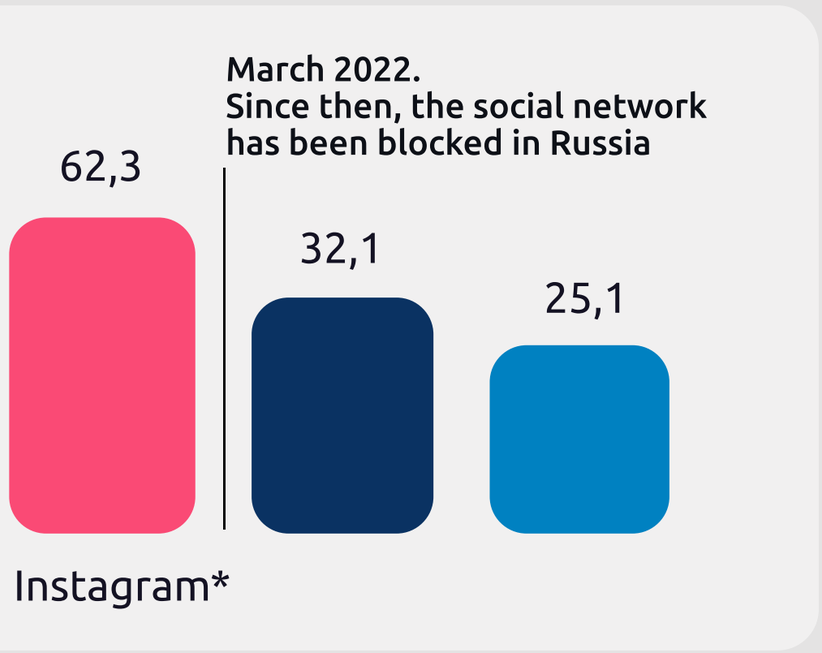
For enhancing brand recognition, channels boasting over 100,000 followers are ideal. Conversely, influencers with audiences up to 100,000 are more effective for driving sales. Discovering these channels can be an exploratory journey, navigable through manual searches, specialized exchanges, and tailored catalogs.

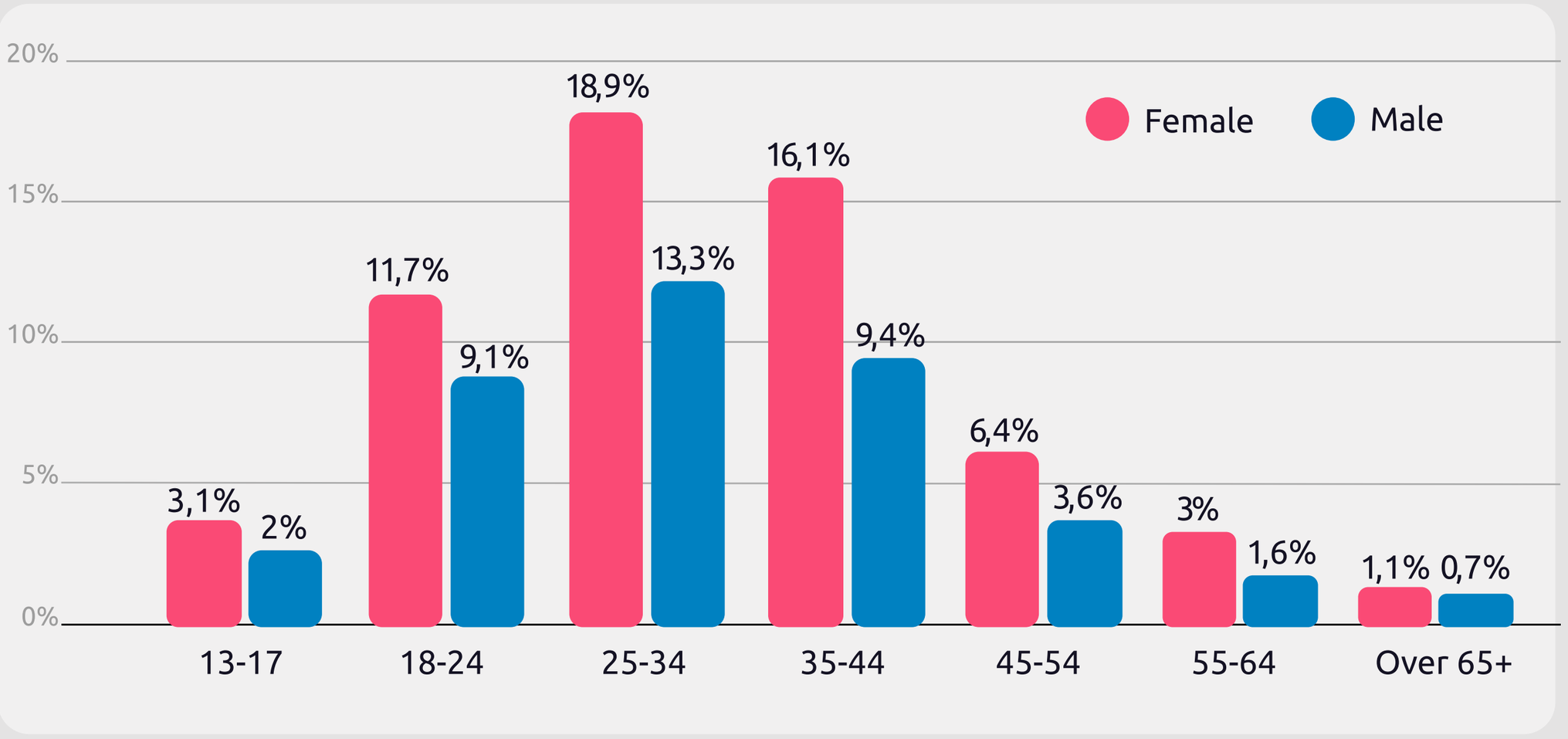
Assessing a channel's impact involves a nuanced analysis of subscriber engagement—view counts, comments, reactions, and overall engagement rates are critical metrics. Regardless of the advertising goal or format, it's crucial to align with the inherent nature of messengers: a focus on timely and newsworthy content. Advertisements should harmonize with the channel's tone, be succinct, and incorporate clear, compelling calls to action.

3.4 Why Instagram* Shouldn't Be Underestimated?

The audience of the social network Instagram* continues to fall after being blocked in 2022. At the end of October 2023, the monthly reach of the platform in Russia was only 25.1 million people - this is almost a quarter less than in the same period of 2022, and 2.5 times less than in October 2021. Many experts attribute this decline to the inconvenience of using Instagram*, which requires a VPN connection to open the resource.

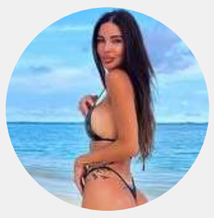
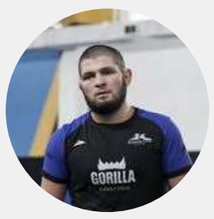
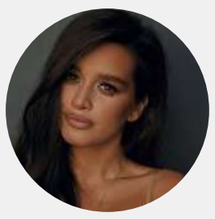
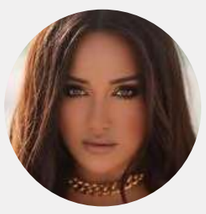
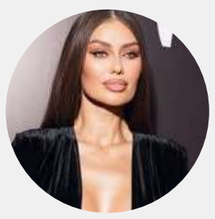
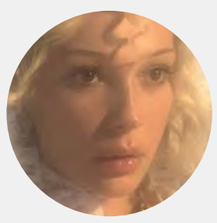
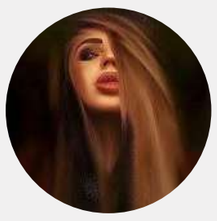
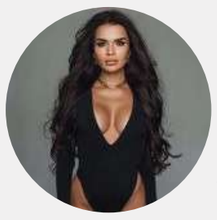
Monthly reach, number of people 12+ who accessed the app at least once a month, million

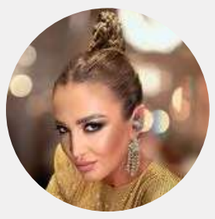
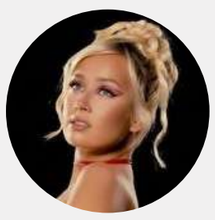
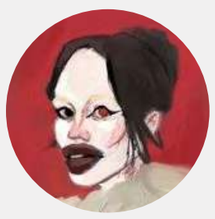




As of November 2023, nearly 19 percent of Instagram users in Russia were women aged 25 to 34 years, making this category the largest group of users of this social network.. Overall, Instagram was dominated by female audiences across all categories.

TOP-20 Russian Instagram* Bloggers

Blogger		SM Influence
	1. Oxana Samyilova	992
	2. Khabib Nurmagomedov	966
	3. Ksenia Borodina	906
	4. Gohar Avetisyan	903
	5. Egor Kreed	899
	6. Victoria Bonya	880
	7. Nastya Ivleeva	880
	8. Karina Kross	879
	9. Elena Sazhina	858
	10. Nadin Serovski	853

Blogger		SM Influence
	10. Timati	844
	11. Olga Buzova	843
	12. Valya Karnaval	834
	13. Klava Coka	830
DANYA WHITE TEAM	14. Morgenshtern (recognised as a foreign agent in Russia)	827
	15. Dava	819
	16. Instasamka	818
	17. Elmira Tolegenova	813
	18. Yerbolat Zhanabylov	812
	19. Irina Pinchuk	805

SM Influence is an index of social media influence. The index takes into account the total engagement of an Instagram channel and the number of publications per year. The index is distributed on a scale and ranges from 0 to 1000 points.
*Survey period: 01 January - 14 December 2023.

Within the vast landscape of Russian Instagram*, direct negotiations between advertisers and bloggers are a common occurrence on Instagram*, often utilizing native advertising techniques.

A significant advantage here is the potential for content to attract a substantial volume of organic traffic, even when posted by micro-bloggers.

However, in Russia, the ability to access detailed analytics or utilize the platform's monetization tools has become impossible . Still, this limitation hasn't deterred some brands and bloggers from continuing their efforts.

In the Russian influencer scene, celebrities from the showbiz sector dominate the charts. Figures like Timati, Ksenia Borodina, Egor Krid, and Victoria Bonya lead the pack. Additionally, the top 20 list includes influencers who initially rose to fame on Instagram* a few years back, such as the renowned TV host Nastya Ivleeva, Oksana Samoylova, Instasamka, among others.

Hence, when discussing Influencer marketing in a broader sense, two primary trends emerge. The first one involves collaborations with high-profile celebrities, often spanning multiple platforms. The second trend is focused on partnerships with micro-bloggers, banking on the lure of organic traffic. Staying attuned to the network's evolving trends, particularly those linked to the reels format, is crucial.

Anyway, after Instagram* was blocked in 2022, local services took over its leadership role in Russia.

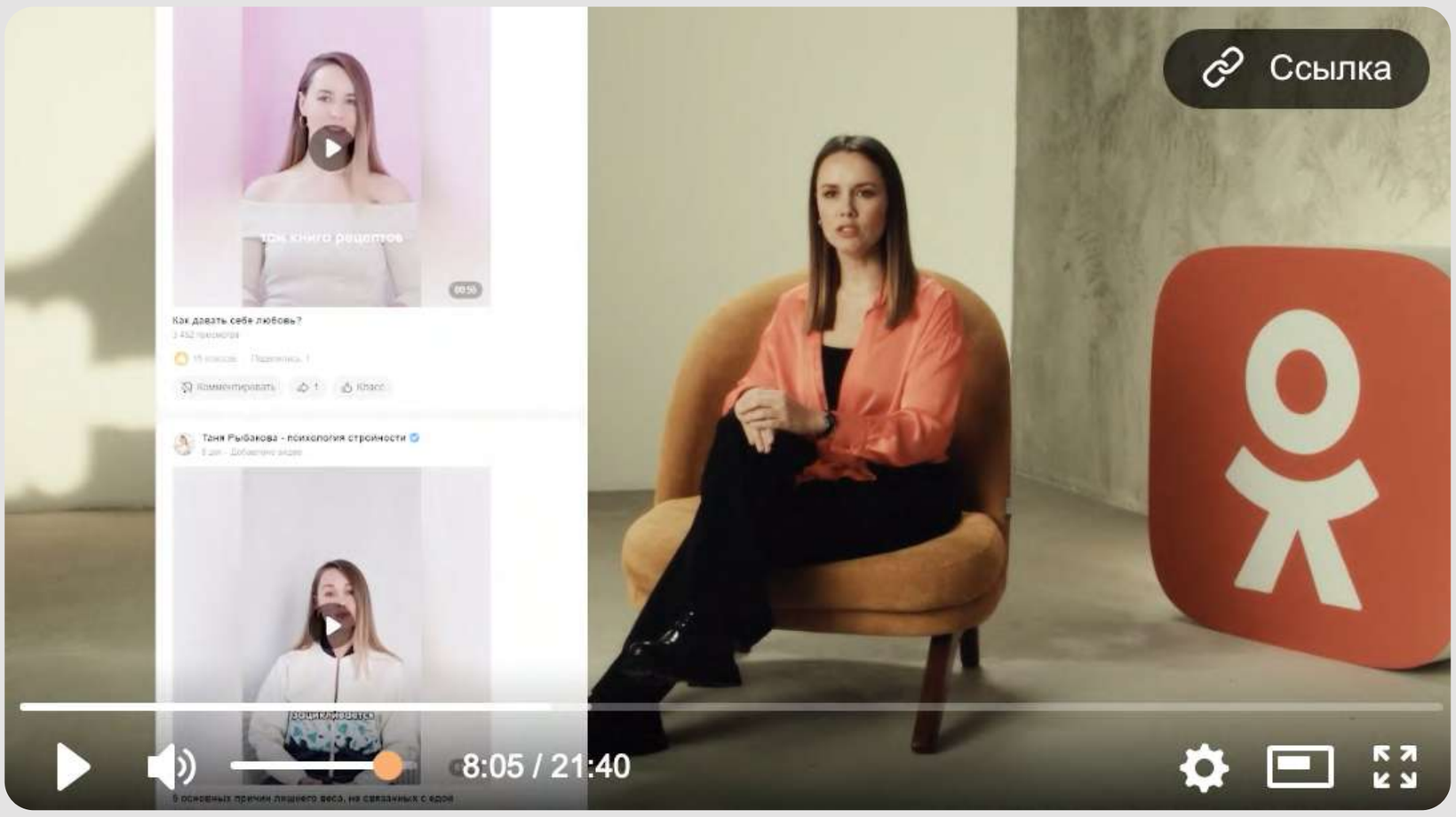
3.5 Influencer engagement projects in Odnoklassniki

Since 2022, a notable shift has occurred with many communities and businesses migrating to Odnoklassniki. The platform's audience, while specific, is both expanding and increasingly financially active. This movement persisted into 2023, albeit in a less conspicuous manner.

Odnoklassniki boasts a monthly user base of 40 million, with a significant 73% accessing the site via mobile devices. Predominantly, its users are concentrated in major Russian cities like Moscow, Krasnodar, and Yekaterinburg.

For its users, Odnoklassniki primarily serves as a hub for connecting with friends and family. Consequently, traditional marketing strategies that promote an idealized visual dream are less effective here. Instead, content that addresses specific problems or life scenarios resonates more successfully with the audience.

In terms of influencer marketing, Odnoklassniki hasn't reached the same level of popularity as targeted advertising. Nonetheless, the platform is actively attracting promising creators. In the summer of 2023, Odnoklassniki launched a project inviting bloggers to create and share shows at no cost. Prior to this, the network had introduced a flagship TV show, "Ok People," hosted by actor Sergei Burunov, which delved into the hobbies of its users. Essentially, Odnoklassniki is strategically nurturing its influencer community, with a particular focus on micro-bloggers who command a high level of user engagement.

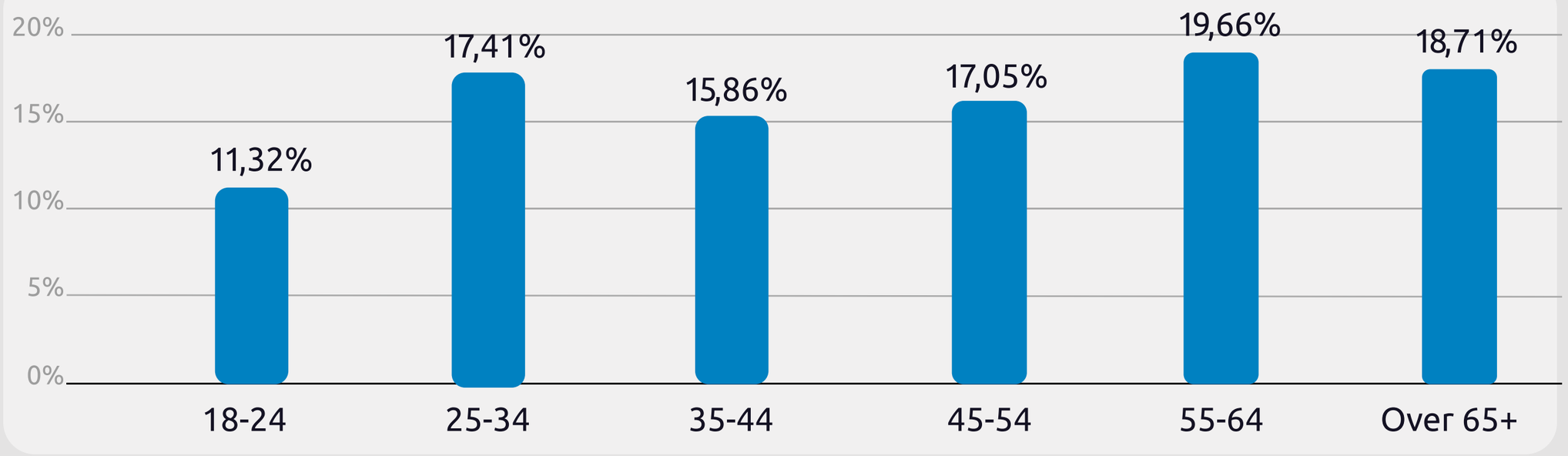


3.6 Shifting Focus to Native Advertising Integrations on Dzen

Dzen is a content creation and viewing platform owned by VK. The Dzen feed generates personalised recommendations for users based on machine learning. Popular content topics are news, politics, culture, sports, entertainment. Until April 2022, Dzen belonged to Yandex and was called "Yandex. Dzen".

- 25% of Russians use DZen every day.
- The Dzen audience in Russia is 80 million people per month. This is 15.91% more than in 2022. Dzen reaches 66.6% of the Russian population.
- 89.94% of global Dzen traffic comes from Russia. The second place is occupied by Ukraine with 2.67%, and Belarus is in the third place with 1.54%.
- The top 10 countries in terms of Dzen traffic also include Kazakhstan, Germany, the USA, Turkey, France, Israel and Poland.

Demographics:



47%
women

53%
men

TOP-20 Dzen Authors and Publics

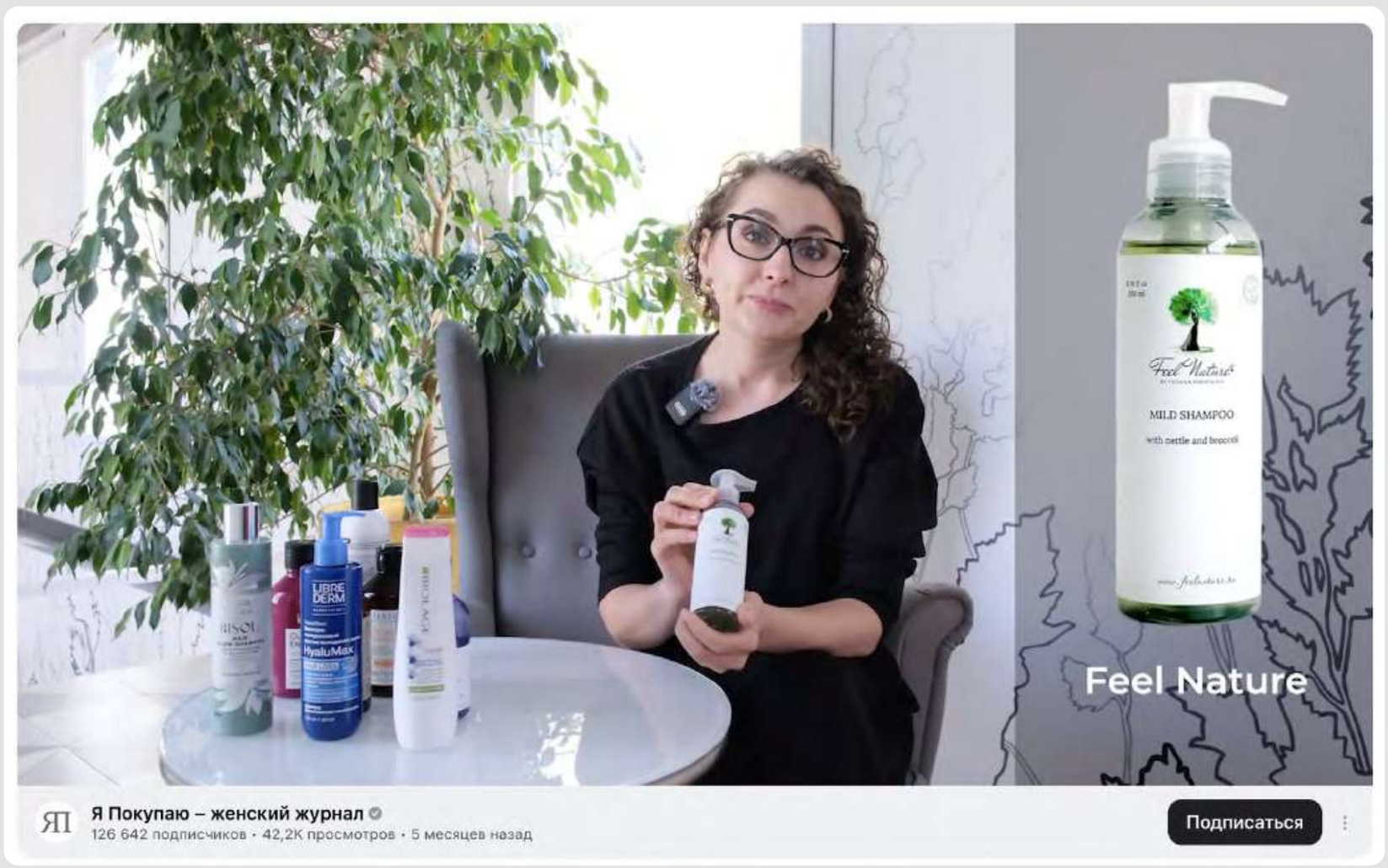
	Autor name	Audience	Comments	Likes	Engagement
	1. Tsargrad	1 769 055	609 978	6 133 642	6 743 620
	2. Avia.pro - News	543 386	229 040	2 448 472	2 677 512
	3. MK	901 690	120 792	1 012 103	1 132 895
	4. Argumenty i fakty aif.ru	957 356	93 555	923 830	1 017 385
	5. 8 times mom	179 059	31 270	881 873	913 143
	6. KP.RU: Komsomolskaya Pravda	1 555 024	93 274	802 110	895 384
	7. Civilisational geopolitics	143 143	34 959	746 673	781 632
	8. Izvestia	641 003	56 688	686 061	742 749
	9. Zakhar Prilepin	321 589	34 647	701 765	736 412
	10. RIA News	1 292 553	30 399	683 622	714 021
	11. Channel 78	72 423	45 398	612 342	657 740
	12. NEWS.ru	202 107	90 993	502 544	593 537
	13. Interesting stories	188 790	27 886	557 123	585 009
	14. Channel Five - news and video	423 344	52 007	526 825	578 832
	15. Military review	445 104	30 409	483 183	513 592
	16. Evgehkap	90 729	21 766	489 474	511 240
	17. Ukraine.ru	340 527	46 524	421 212	467 736
	18. Style Fashion Trends	82 049	25 092	427 364	452 456
	19. Velikoruss	146 744	14 656	411 189	425 845
	20. Public Tews Service	99 131	18 539	405 960	424 499

In examining the landscape of influencer marketing on the Dzen social network in Russia, several key insights emerge.

Strength in Spot Placements: The platform excels in spot placements, particularly when collaborating with specialized bloggers. This suggests that brands looking for focused engagement within specific audiences can leverage Dzen's unique positioning. For example, topics of health, technology, b2b market goods, etc.

Importance of a Brand Presence: Establishing a brand page on Dzen is highly beneficial. The network offers substantial opportunities for organic and payment promotion, making it a strategic choice for brands seeking to enhance their digital footprint in a more impactful manner.

Leveraging News Format: Given the popularity of this format content among TOP-20 authors on Dzen, brands should consider tailoring their content strategy to align with this trend. The material can be presented as an article, horizontal video up to 3 hours, live broadcast or short posts/rolls. By adopting a similar approach, brands can increase their resonance with the platform's audience.



In conclusion, Dzen presents a unique avenue for influencer marketing in Russia. Its strength lies in its niche appeal and potential for organic growth, making it an important part of a diversified digital marketing strategy.

3.7 Russian Twitch stability has been proven for years

Twitch reigns as the foremost video streaming service in Russia, renowned for broadcasting esports tournaments. Its standout feature is the ability for real-time interaction between viewers and streamers.

On Twitch, users actively engage in creating live broadcasts, videos, chats, comments, and various other interactive content forms.

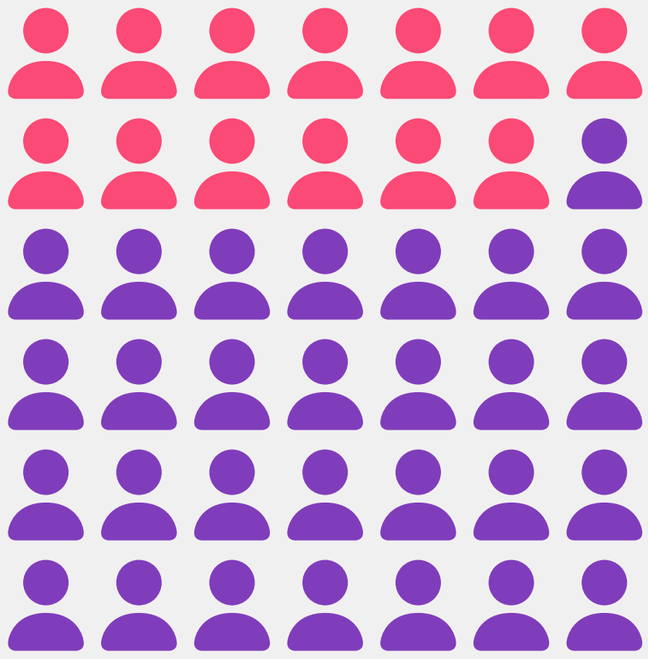
Top countries:

USA	20,6%	▲+13.53%
Germany	7,03%	▲+11.11%
South Korea	4,85%	▲+13.94%
Russia	4,75%	▲+7.75%
Japan	4,39%	▲+13.87%
Others	58,39%	

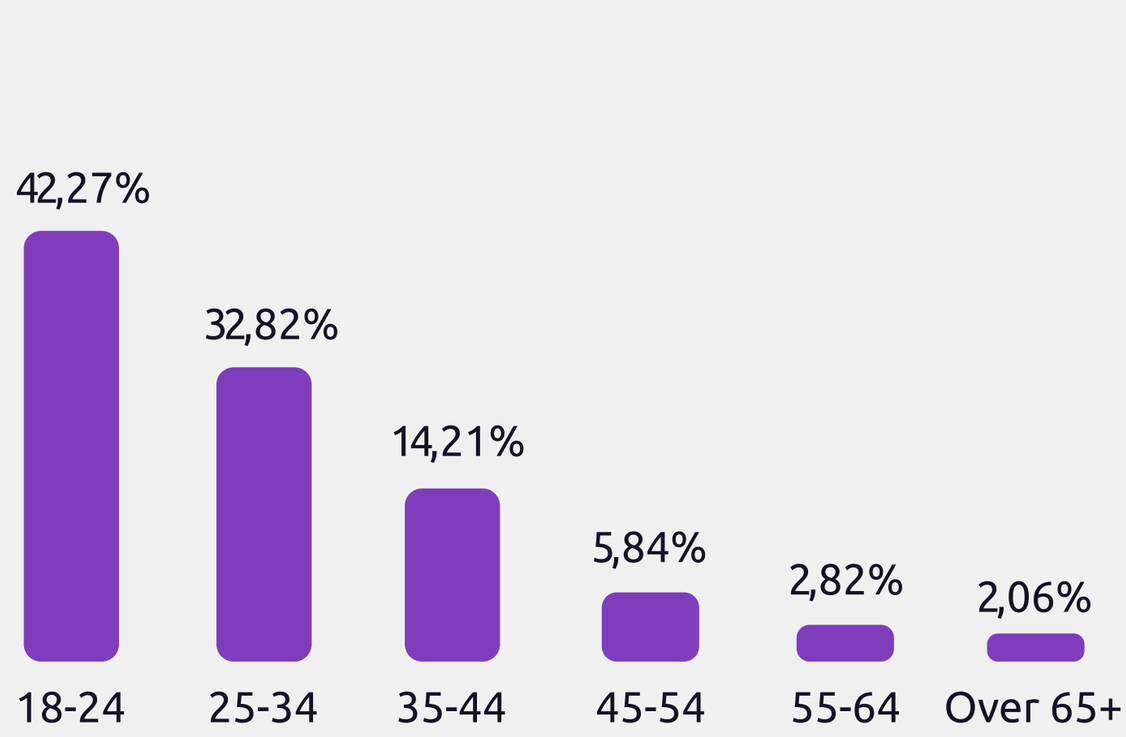
Topics:



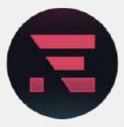
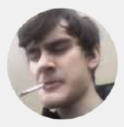
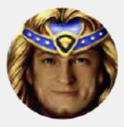
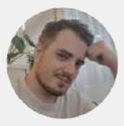
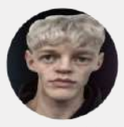
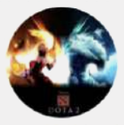
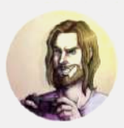
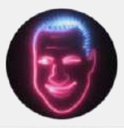
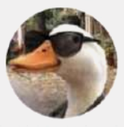
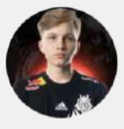
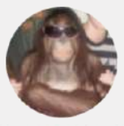
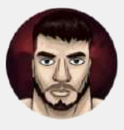
Distribution by gender:



Distribution by age:



TOP-20 Russian Twitch Streamers

		AVG VIEWERS	TIME STREAMED	ALL TIME PEAK VIEWERS	HOURS WATCHED	RANK	FOLLOWERS GAINED	TOTAL FOLLOWERS	TOTAL VIEWS
#1	 EVELONE192	35,893	7.1 hours	153,742	255K	50	+5.6K	2.35M	99.1M
#2	 BUSTER	23,038	49.2 hours	196,574	1.13M	63	+30.8K	3.82M	114M
#3	 BRATISHKINOFF	15,131	103 hours	146,916	1.56M	76	+47.7K	2.75M	114M
#4	 VOODOOSH	7,709	191.7 hours	52,516	1.48M	134	+7.9K	350K	41.3M
#5	 RECRENT	6,705	223.7 hours	47,737	1.50M	140	+16.0K	1.09M	74.3M
#6	 HONEYMAD	13,900	39.1 hours	35,127	543K	146	+3.2K	733K	87.2M
#7	 PARADEEV1CH	15,048	24.4 hours	81,966	367K	150	+28.3K	1.76M	12.4M
#8	 LENAGOL0VACH	9,172	117.4 hours	22,916	1.08M	153	+15.9K	543K	29.5M
#9	 NIX	11,099	68.3 hours	246,261	758K	164	+6.5K	726K	18.7M
#10	 KORESHZY	12,155	49 hours	65,061	595K	168	+32.8K	1.70M	12.3M
#11	 STRAY228	9,313	79.5 hours	49,312	740K	194	+8.8K	1.54M	120M
#12	 JESUSAVGN	8,542	93.8 hours	106,667	801K	197	+11.1K	1.76M	75.6M
#13	 DMITRY_LIXXX	6,804	140.9 hours	31,463	959K	205	+19.8K	1.33M	44.7M
#14	 JUST_NS	7,253	115.1 hours	114,216	835K	225	+2.1K	708K	55.5M
#15	 SHADOWKEKW	9,592	56.1 hours	34,509	538K	226	+7.6K	441K	9.74M
#16	 M0NESYOF	11,224	23 hours	28,407	258K	251	+20.7K	944K	11.9M
#17	 N3KOGLAI	10,749	16.4 hours	543,743	176K	281	+13.2K	2.60M	12.8M
#18	 STROGO1337	6,228	109.2 hours	20,278	680K	293	+13.6K	465K	5.30M
#19	 RAVSHANN	7,443	69.5 hours	19,746	518K	295	+36.7K	328K	1.91M
#20	 C_A_K_E	4,147	197 hours	43,277	817K	329	+4.3K	397K	89.7M

Overall Rank is based on average concurrent viewers, followers, views, and stream time for the last 30 days, January 2024, Russian language. Twitch personalities only are shown.

Twitch advertising budgets in Russia

The Russian advertising market on Twitch is a burgeoning sector, with an estimated annual value exceeding 1 billion rubles. Focusing on the top 50 Russian-speaking Twitch streamers by subscriber count across their primary accounts (which includes platforms like Twitch, Instagram*,Telegram, VKontakte, and YouTube), the monthly advertising spend totals are about 85.9 million rubles. This translates to an average of approximately 1.7 million rubles per month for each streamer.

Among the most prevalent advertising categories on Twitch, online casinos lead with 23 advertisers, followed closely by games with 19, and sports betting with 8 advertisers. Other notable categories in the top 10 include computer equipment, loot boxes (virtual boxes in games offering random prizes), online services, offline retail stores, offline entertainment, food, and banks.

TOP-10 Twitch commercial categories in Russia

	Category	Advertiser count	Mention count
1.	Sports Betting	8	986
2.	Online Casino	23	327
3.	Games	19	280
4.	Loot Boxes	8	167
5.	Fast Food	3	164
6.	Banks	3	158
7.	Energy Drinks	1	153
8.	Online Services	6	139
9.	Computer Equipment	8	81
10.	Online Education	2	75

Leading the pack in terms of ad integrations are bookmakers Winline, with a staggering 491 advertising integrations, and BetBoom, with 310 ones. Tornado Energy, an energy drink brand, ranks third with 153 ad integrations. Other prominent advertisers making their mark include Dodo Pizza, Tinkoff, Mycsgo, and Yandex, all securing spots in the top ten for advertising integrations on Twitch.

TOP-10 Twitch advertisers in Russia

Brand	Category	Mention count
1. Winline	Sports Betting	491
2. BetBoom	Sports Betting	310
3. Tornado Energy	Energy Drinks	153
4. Do-Do Pizza	Fast Food	152
5. Tinkoff	Banks	93
6. Mycsgo	Loot Boxes	83
7. Cat Casino	Online Casino	79
8. Pari.Ru	Sports Betting	77
9. SkyEng	Online Education	74
10. Yandex	Online Services	64

Twitch in Russia stands as a thriving service, poised for continued progress over the next decade due to its adeptness at meeting audience needs. Influencers on Twitch command an active and loyal follower base, fostering a high level of trust. The platform offers diverse formats for brand integration, such as product placements within streams, reviews, raffles, and more.

However, Twitch's advertising area underwent a considerable shift on June 6. The platform now prohibits certain types of advertisements, including video adverts, banners, and audio promos, and restricts logo displays to no more than 3% of the screen. Additionally, streamers are barred from advertising political and medical products, gambling, tobacco, and certain financial services.

Moreover, navigating influencer partnerships on Twitch does present challenges. Some streamers may lack a deep understanding of the products they promote, and advertisers might not fully grasp the platform's nuances.

However, the benefits far outweigh these hurdles. The future of Twitch in Russia looks promising, with expectations of new metrics, enhanced conversion analysis, and a more strategic selection of influencers. These influencers will not only be ready to forge effective advertising relationships but also command the most loyal and engaged audiences.

3.8 Summary highlights

In the wake of the early 2022 crisis, influencers in Russia demonstrated remarkable adaptability, leading to a resurgence in market growth by the latter half of the year. Amidst this recovery, bloggers shifted from banned social networks to local platforms like Telegram and VKontakte, subsequently raising their advertising rates. Meanwhile, advertising integrations on YouTube and Twitch evolved to become more native, operating without the need for an intermediary advertising platform.

In 2023, a significant uptick in earnings was observed among individual bloggers, who constitute 95% of Russian authors, with a 30% increase in income. Those who are self-employed, representing 4% of bloggers, saw an even greater rise of 35% in earnings. The cost of advertising placements with bloggers has escalated by 30% compared to February of the previous year, and this trend is anticipated to continue into 2024, particularly for celebrities and macro-bloggers. Average bloggers experienced a more modest increase in rates, around 10%

The influencer marketing in Russia is undergoing a significant transformation, moving into its second developmental phase. This transition is marked by an increasing shift from the traditional platform-centric approach, where bloggers primarily focused on platforms like YouTube, Instagram*, or TikTok, to a more diverse and multifaceted strategy.

This new phase is characterized by a broader diversification in media, content, and formats. Notably, there's a growing prominence of video content, news style which is reshaping the way influencers engage with their audiences. This trend is not just limited to the major platforms but is also evident in narrower-profile social networks like Odnoklassniki and Dzen. These platforms are adapting to the changing digital landscape, offering unique opportunities for influencers to create more targeted and specialized content.

In summary, the influencer marketing environment in Russia is evolving into a more dynamic and versatile domain. Bloggers are leveraging the strengths of both broad and narrow-profile platforms, capitalizing on the growing appetite for video content, and embracing a wider array of media and formats. This evolution bodes well for the future of influencer marketing in Russia, promising continued growth and innovation in the field.

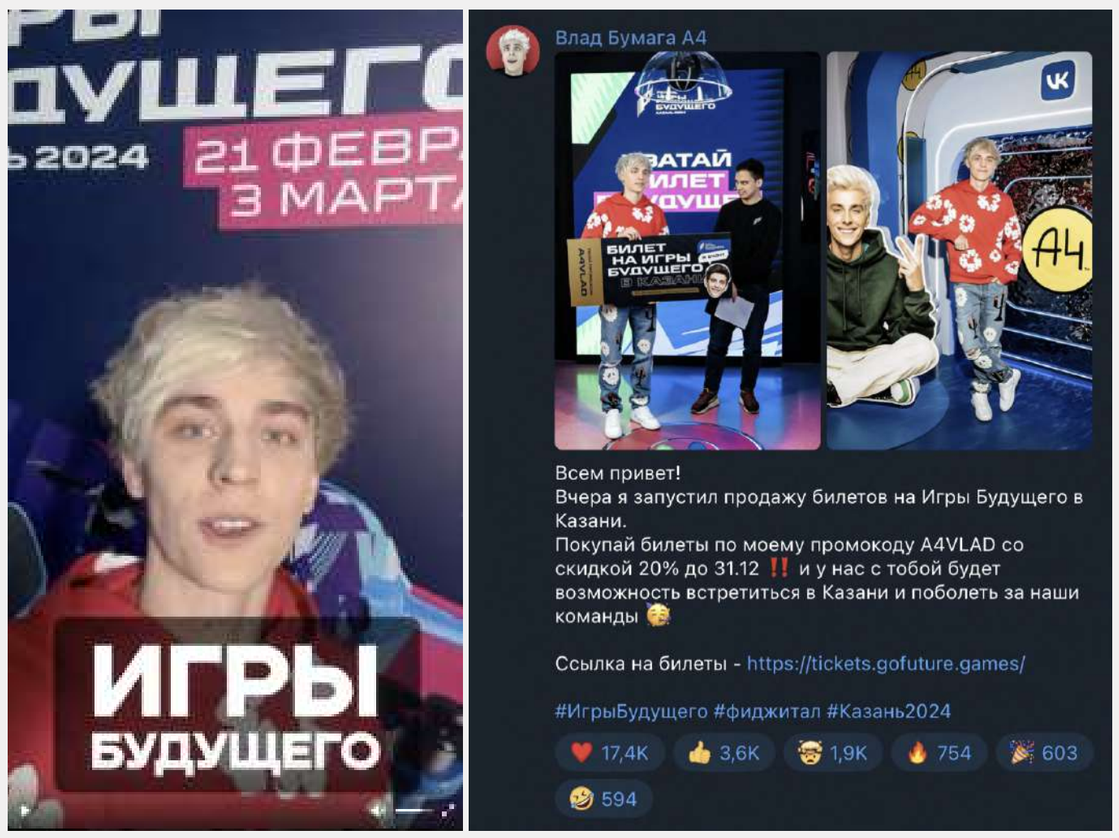
Section 4

Trends 2024 in the Russian Influencer Market: Key Focus Areas for Brands

Trends 2024 in the Russian Influencer Market: Key Focus Areas for Brands

In 2024, Influencer marketing in Russia is navigating a path that both mirrors global trends and diverges due to unique aspects of its local social networks and other distinct factors.

The 2022 block of foreign social networks catalyzed a significant shift among bloggers towards local platforms. This transition spurred a wave of experimentation in platform selection, content formats, styles, and more. One notable outcome of these shifts is the emergence of a cross-platform trend. Influencers are increasingly duplicating their content across multiple platforms simultaneously. This approach effectively doubles key metrics: it not only enhances user engagement with the content but also expands the reach of advertising integrations.



An advert for an offline event for gamers in Russia, "Games of the Future", posted by popular blogger Vlad Paper A4 on his official pages on Telegram and VKontakte.

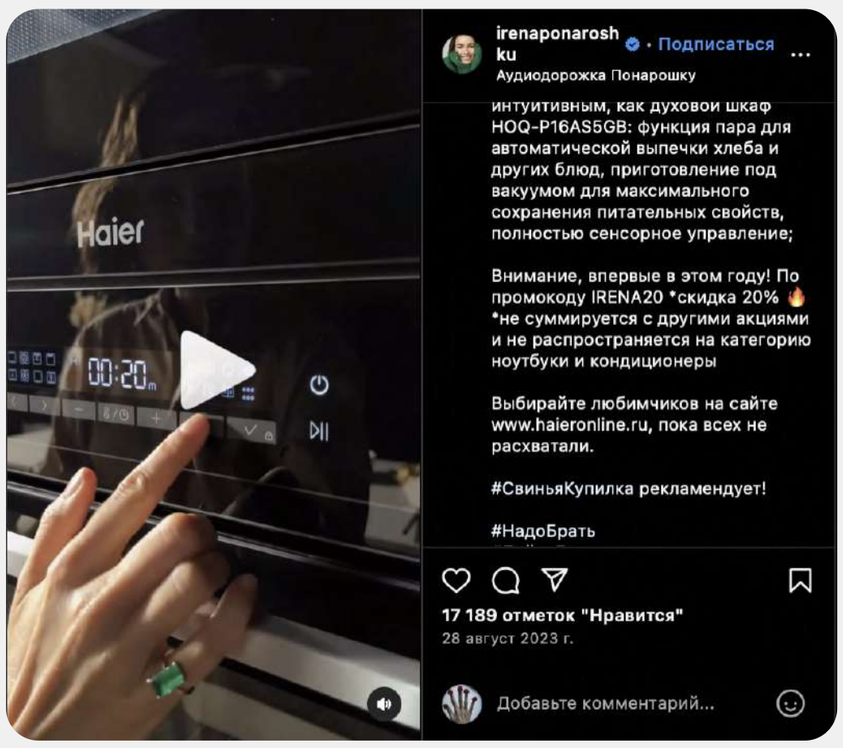
Furthermore, Russian internet platforms are actively fostering the growth of influencer marketing helping bloggers in their transition from international services. This support manifests in various collaborations, such as the production of exclusive shows. Additionally, there's a trend towards creating individual exclusive videos by bloggers who maintain a presence on multiple platforms. For instance, platforms like Rutube and VKontakte are providing authors with user-friendly tools to facilitate the transfer of content from foreign services. As previously mentioned, Odnoklassniki is focusing on promoting emerging bloggers, contributing to the diversification of the influencer landscape. Meanwhile, Telegram is innovating new ways of interaction, including the introduction of vertical stories, thereby expanding the possibilities for influencers.

The trend of long-term collaborations and brand ambassadorships with bloggers, which has been gaining momentum globally for years, is also becoming increasingly prominent in the Russian market. Establishing stable, ongoing partnerships with influencers is proving to be more beneficial for brands, yielding better results over time. This approach not only streamlines marketing efforts but also fosters a sense of consistency and authenticity in brand messaging.

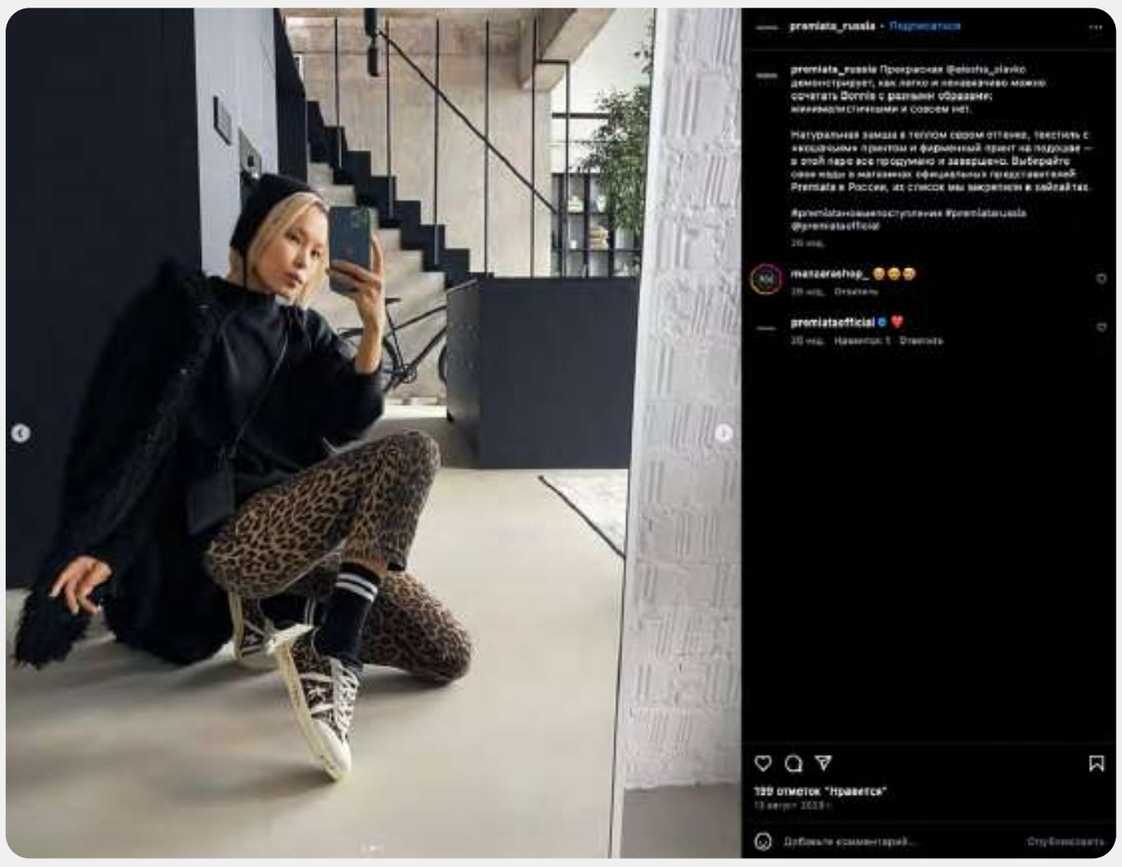
Haier brand's advertising collaboration with TV presenter Irena Ponaroshku. Reviews of products were published throughout 2023 in the format of Instagram* Reels.







Mirroring a global pattern, the Russian market is witnessing a rising influence of micro- and nano-bloggers. This shift is likely attributed to the fact that these smaller-scale influencers tend to have higher engagement rates compared to their more famous counterparts. They offer brands a more cost-effective way to reach specific target audiences, delivering better value for the investment. Collaborations with such bloggers are becoming increasingly common across various social platforms, including Russia's version of Instagram*.



Premiata brand promotional post with micro blogger Alena Savko.

Concurrently, more sophisticated, emotionally resonant integrations aimed at boosting user engagement are appearing in the Russian market. The era of classic posts is gradually receding, making way for more inventive and immersive promotional approaches. Advertisers are increasingly seeking out these novel methods to connect with audiences more effectively.

In line with this trend are the live streams on Twitch, which continue to maintain strong audience figures and the presence of influential gamers in Russia. These live streams offer a dynamic, real-time interaction platform, allowing for deeper emotional connections and engagement between influencers and their audience.
This shift towards more complex and emotive content, micro/nano bloggers orientations reflects a broader evolution in the influencer marketing sphere, where authenticity and personal connection are becoming key drivers of audience engagement and brand loyalty.

In the light of these trends, 2024 is anticipated to be a pivotal year for the final redistribution of content creators to local social platforms, following the restrictions imposed on foreign services. However, this transition also brings its own set of challenges.

What are the complexities of Russian influencer marketing right now?

Influencer marketing in Russia is navigating a challenging terrain, characterized by a combination of regulatory hurdles and unique issues related to various platforms. Currently, 48% of Russian bloggers are earning through Instagram*, a platform banned in Russia and owned by Meta, labeled as an extremist and terrorist organization in the country. The impending blockage of VPN services by Roskomnadzor, starting March 1, 2024, threatens the stability of bloggers primarily reliant on Instagram* for income.

The transition to local platforms is not without its difficulties. The unpredictability associated with YouTube promoting is a concern for advertisers, given the risk of bloggers being blocked for different reasons (for instance, political reason).

VKontakte, a popular alternative, doesn't entirely replicate YouTube's functionality. An example of this is VK Video, which doesn't save the point at which a user stops watching, leading to inflated view counts and causing advertisers to pay more for what are essentially repeat views.

The intricacies of advertising on Dzen and Odnoklassniki are still not fully grasped by advertisements, adding complexity due to the distinct nature of these networks.

Further, Rutube, Russia's counterpart to YouTube, faces server capacity issues and cannot sustain a load on par with the Russian-language YouTube. This is in addition to other challenges, including the monetization aspects for creators.

These platform-specific challenges, combined with a lack of practical case studies and recent changes in Russian advertising legislation, create a multifaceted and demanding environment for bloggers and advertisers in the Russian influencer marketing sector.

Section 5

Understanding Blogger Advertising Through the Lens of Russian Legislation

An important innovation for last years was the mandatory labeling of advertising on the Russian Internet that was adopted on September 1, 2022. Since this time any online advertisement must be labeled, and all information about it must be submitted to the Unified Registry of Internet Advertising (ERIR) through the Advertising Data Operator (ADO).

This is monitored by Roskomnadzor, and all participants in the advertising chain must provide it with information about advertisements displayed on the Internet. They will have to report both before and after an advertising campaign.

Data communication subjects and objects

Who provides data?	Who communicates data from the market and issues a token?		Who will get access to data?
Advertisers **Advertising system** **Mediators** agencies or freelancers **Publishers** platforms that are in direct contact with advertisers	→ ADO 1 ADO 2	→ ERIR	→ **All parties** **Federal Anti-Monopoly Service** **Federal Tax Service** **Roskomnadzor**

Labeling is necessary in any of these situations:

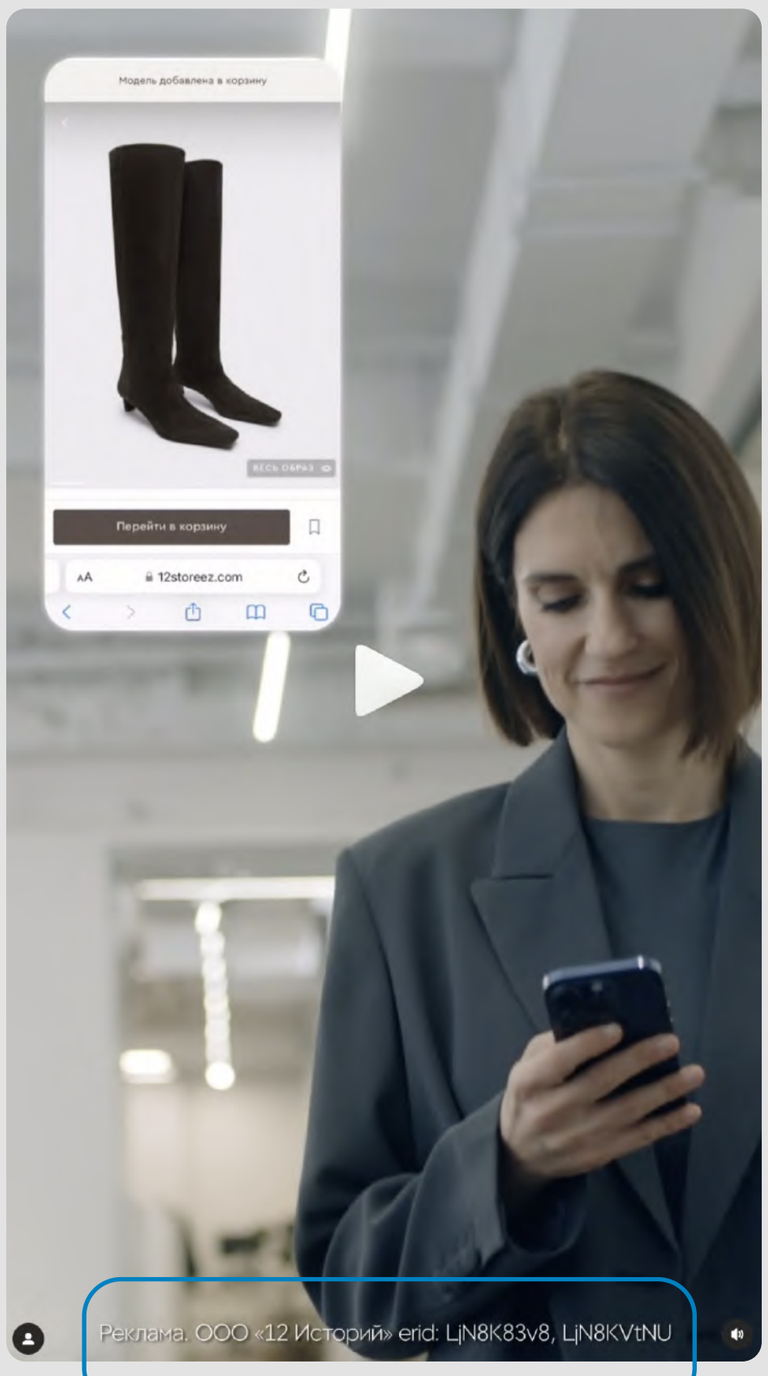
- You're advertising your products on your website, your app, or your social media page;
- You contact an advertiser – another site, a social networking page, a blogger;
- You contact an agency and they place the ads for you.

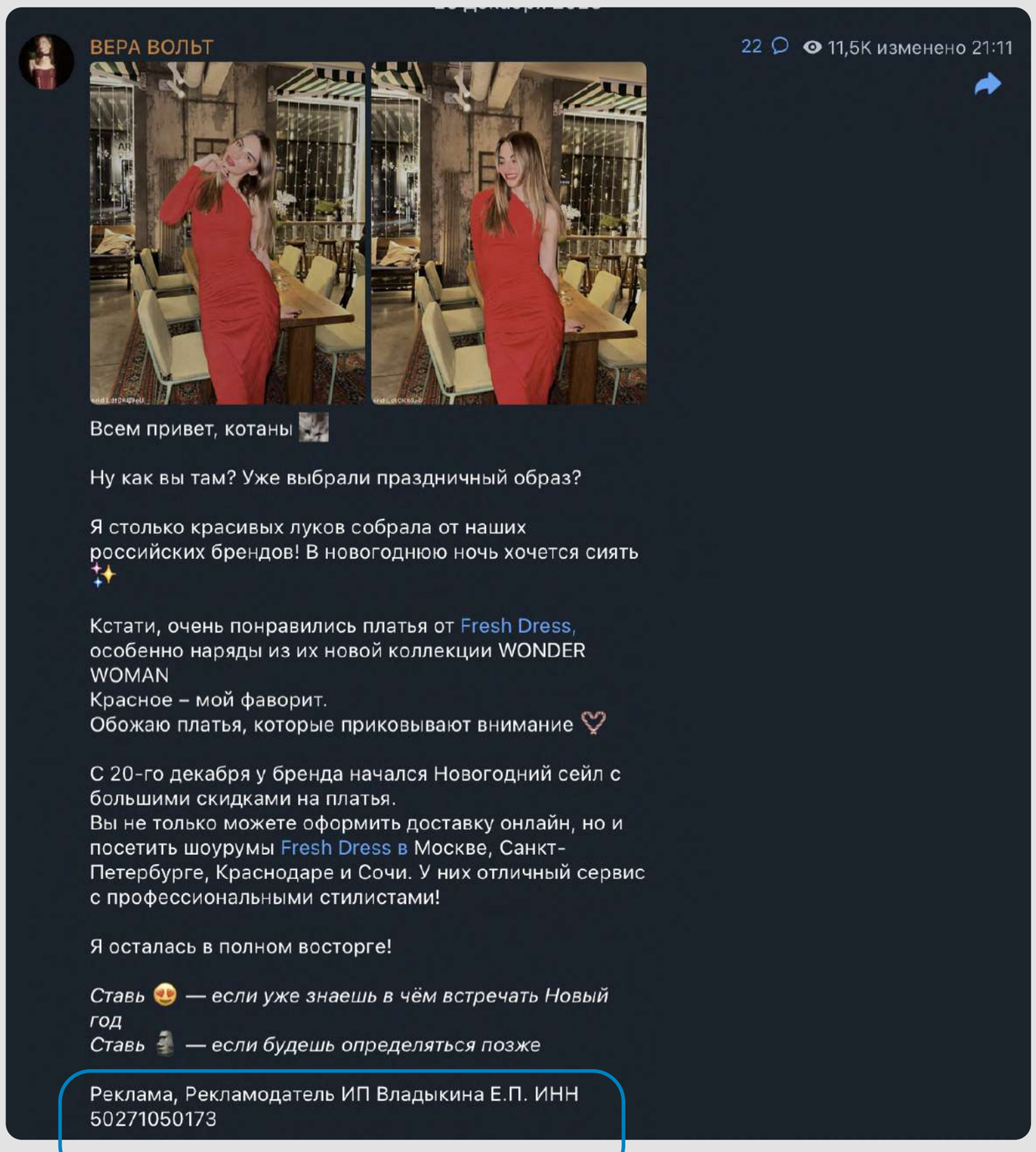
Advertising is information that:

- Is addressed to an indefinite circle of people;
- Aimed at attracting attention to the advertised object, creates interest to it and promotes it in the market.

Everything that is considered advertising must be marked, except: social advertising and advertising on TV and radio programs, if it is also placed on the Internet without change.

Advertisements for your own products in email newsletters and push notifications must be marked "Advertising", but you do not have to submit the information to ERIR.





How do advertising systems and agencies work with ad labeling?

“As a lawyer, I would like to clarify the current scenario regarding advertising systems and their integration with advertising data operators. Systems like Yandex.Direct and VK Ads have an automatic integration process with these operators through an API, which generates tokens without the need for businesses to request them separately.

However, for advertising on other platforms, especially when involving social media influencers, such as Telegram channel ads or Instagram reels, it's necessary to apply to an external Advertising Data Operator (ADO)*

When you enlist the services to an RMAA, you effectively offload the responsibility of ODS interaction to us. We handle all aspects of ad marking for our clients, ensuring compliance with regulatory requirements.

For instance, this is particularly true for micro bloggers or individual influencers who often lack extensive experience in this field. They typically find it more feasible to engage an agency to handle the creation of advertising marks.

While the introduction of these regulations has indeed increased the complexity of our work, we've found these challenges to be manageable. Initially, the amount of information and data needed for compliance reporting can appear overwhelming.

However, at RMAA, we've successfully streamlined our internal processes for ad labeling. This approach has significantly reduced the burden of paperwork for our clients, allowing them to focus on their core business activities”.

Anna Galutskikh
HEAD OF LEGAL DEPARTMENT RMAA

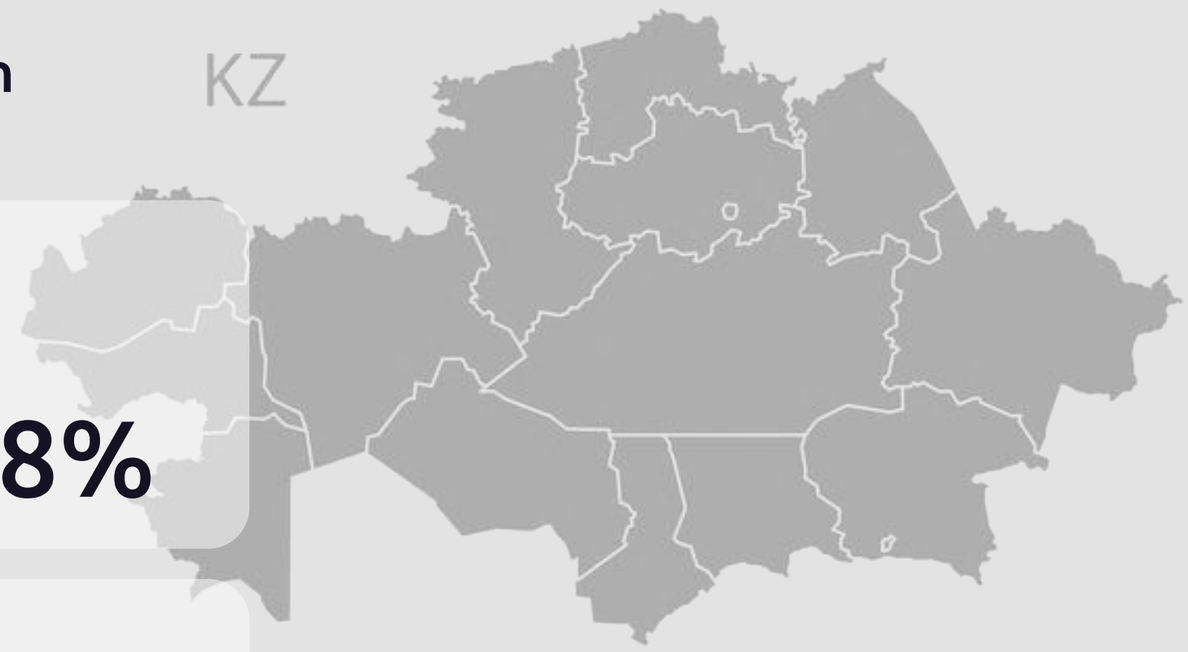
Section 6

CIS Influencer Marketing Overview

6.1 Kazakhstan

In Kazakhstan, 17.3 million out of 19.5 million of the population use the Internet. The distribution of users by region is fairly smooth, with the capital and major cities traditionally leading the way. 76% of users go online from smartphones, and 60% of users use only mobile traffic.

Portraits of Internet users in Kazakhstan look as follows:



women **52%**

men **48%**

29 %
are aged 6-19

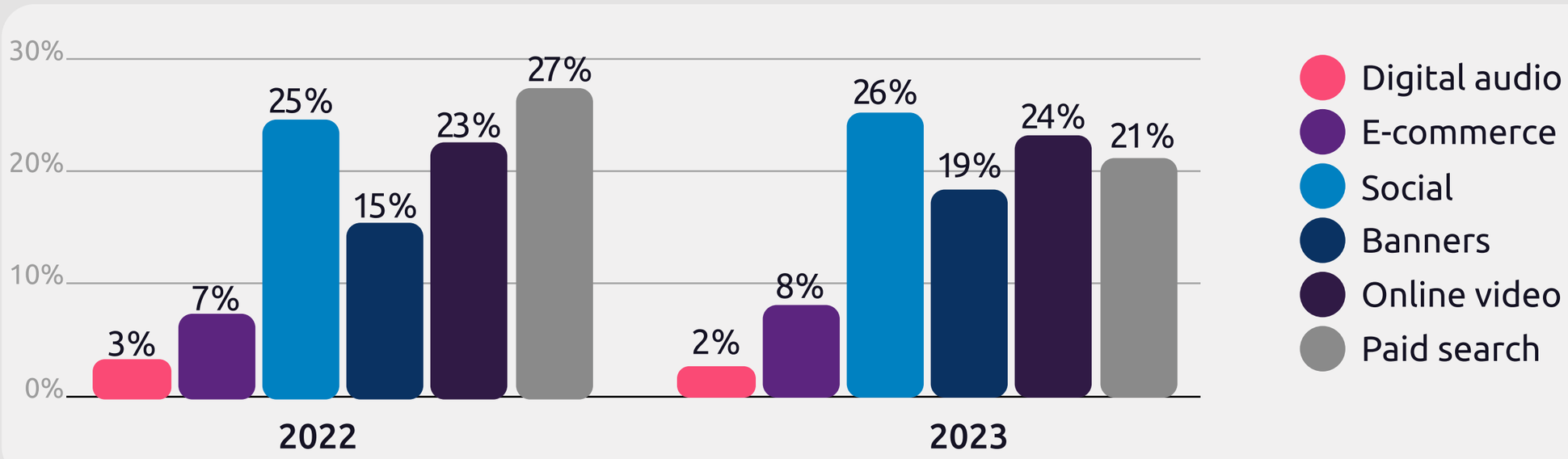
41 %
are aged 20-41

88 %
work in the country

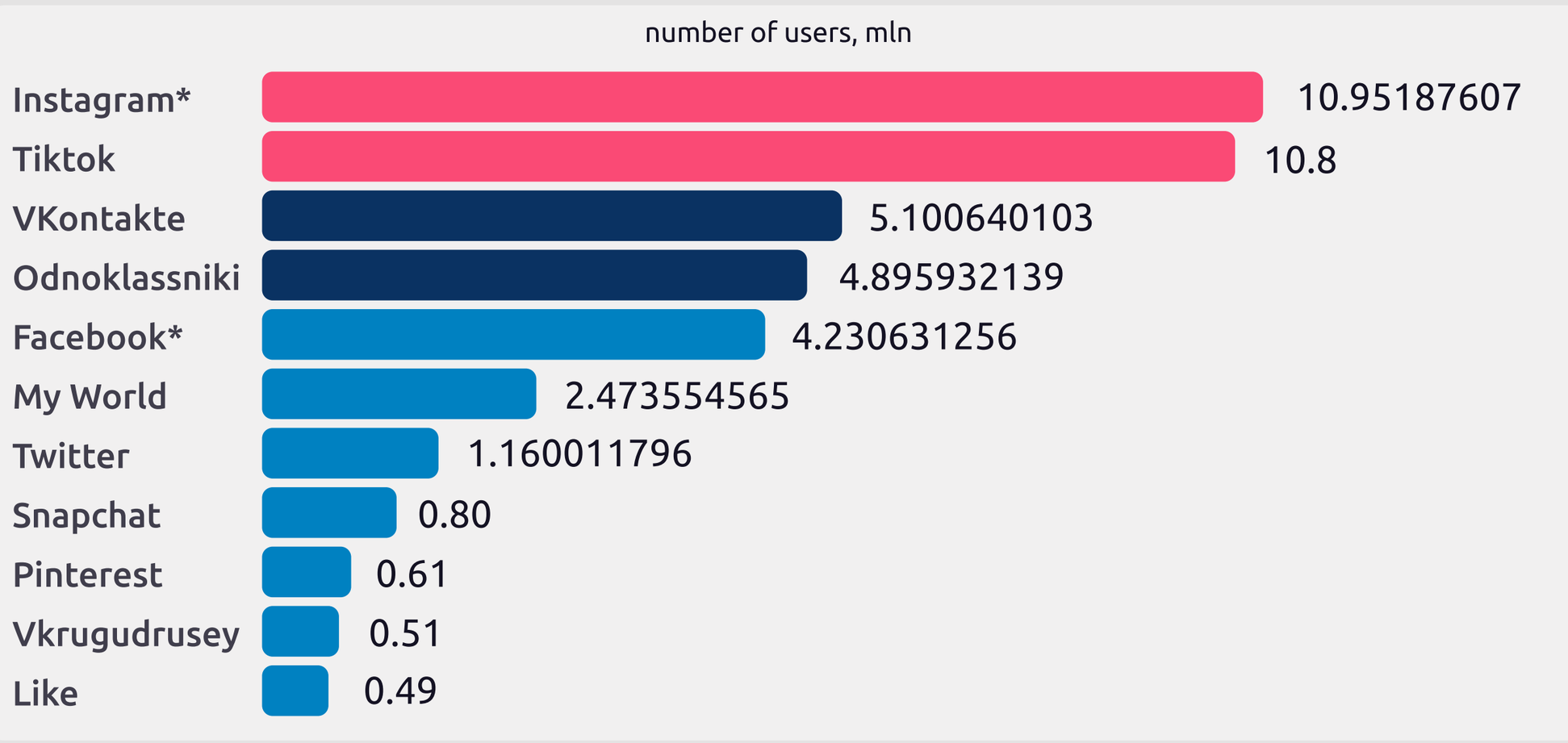
89 %
are online on a daily basis

Over the past five years, investment in digital has doubled in Kazakhstan. This year, the share of investments in digital channels will grow to 43%. This is due to the growing reach and trust in digital advertising and the wide opportunities for personalized communication.

Digital investment structure



The Kazakhstan Digital Influencer Ecosystem



In Kazakhstan, the undisputed favorites among social media platforms are Instagram* and TikTok, enjoying open accessibility unlike in the Russian market. This distinction also extends to other regions of the CIS. However, VKontakte and Odnoklassniki hold their ground as popular choices among users.

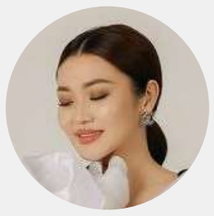
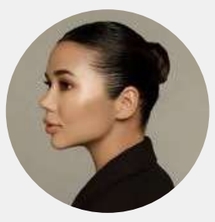
This variety in platform preference is a critical consideration for anyone devising strategies to enter the region leveraging targeted advertising and influencer partnerships.

On Instagram*, personalities like Nazerke Almukhametova (@asmr_blogger), Kairat Nurtas (@kair_n), Asha Matai (@asha_matai), and Nurdaulet (@nnnurdaylet) skillfully present their content in both Kazakh and Russian, offering a bilingual charm. Conversely, influencers such as Elmira Tolegenova (@elt6i), Aliya Baitugaeva (@super.mamasita), Toktarbek Sergazy (@sekavines), and Karina Oksukpaeva (@oksukpaevak) focus on Russian-speaking audiences.

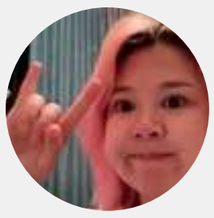
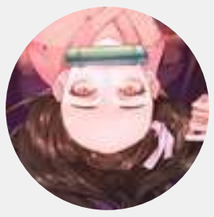
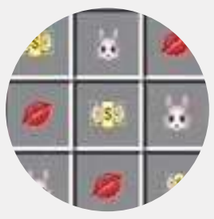
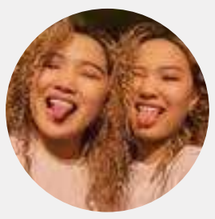
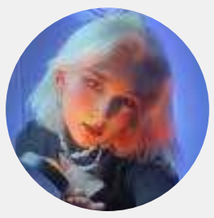
In the realm of TikTok, a shift towards English content is emerging, broadening the platform's universal appeal. Influencers like Kiki Kim (@kikakim), the group Bip House (bip.house), Omari (@omari.to), Kagiris Twins (@kagiristwins), and Bakiyeva Adalyat (@adaliatta) are pioneering English in their profiles, showcasing a global content outreach. Leading the pack, Homa (@homm9k) along with Yolo House (@the.yolohouse), Ilya Borzov (@ilya_borzov), and Ten Yujin (@ten_yujin), blend Russian and English in their content, enhancing its richness. Meanwhile, Dasha Doshik, celebrated in Russia, sticks to the Russian linguistic rules.

This linguistic variety not only illustrates the diverse nature of Kazakhstan's influencer scene but also highlights how these influencers adeptly bridge cultural and linguistic differences, fostering a colorful and interconnected online ecosystem.

TOP-10 Kazakhstan Instagram* bloggers

	Blogger	Instagram* Link	Subscribers, mln
	1. Nazerke Almukhametova	@asmr_blogger	10.3
	2. Erke Esmahan	@erke_esmahan	8.3
	3. Elmira Tolegenova	@elt6i	7.2
	4. Aliya Baitugaeva	@super.mamasita	7.1
	5. Kairat Nurtas	@kair_n	6.8
	6. Toktarbek Sergazy	@sekavines	6.8
	7. Karina Oksukpayeva	@oksukpaevak	4.8
	8. Asha Matai❤️❤️❤️❤️❤️KZ	@asha_matai	4.5
	9. Nurdaylet	@nnnurdaylet	4.5
	10. Saken Maigaziyev	@saken_maigaziyev	4.2

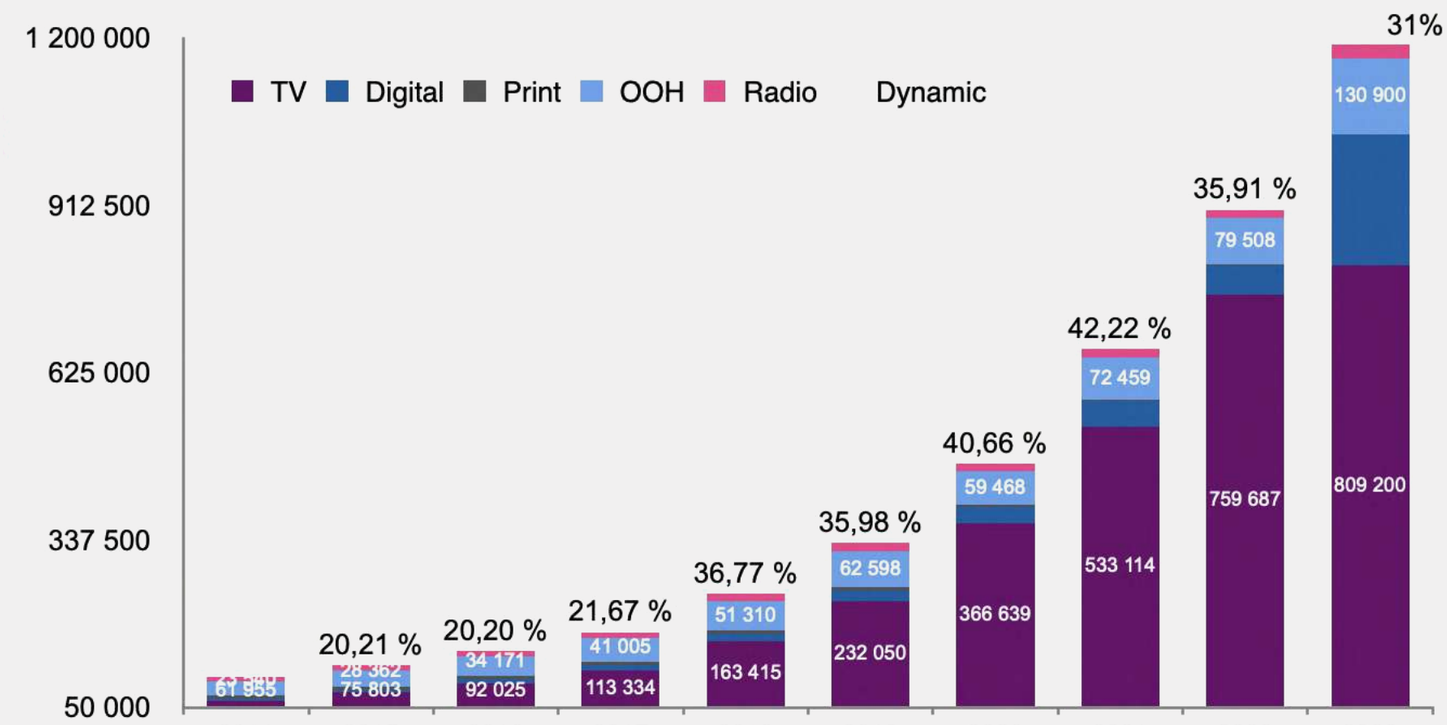
TOP-10 Kazakhstan Tik-Tok Bloggers

	Blogger	Instagram* Link	Subscribers, mln
	1. Homa	@homm9k	52.5
	2. Kika Kim	@kikakiim	36.5
	3. Yolo House	@the.yolohouse	27.7
	4. Bangers in PY Jamas	@bip.house	26.9
	5. Ilya Borzov	@ilya_borzov	23.2
	6. i_am_doshik	@i_am_doshik1	22.2
	7. omari.to	@omari.to	30.4
	8. Ten Yujin	@ten_yujin	20.9
	9. Kagiris Twins	@kagiristwins	21.2
	10. Adaliatta	@adaliatta	20

6.2 Uzbekistan

For three consecutive years, Uzbekistan's advertising market has experienced consistent growth in investments, particularly in TV and digital advertising. Television remains the primary catalyst driving this market. Remarkably, the digital segment has surged by 347% in volume. This upward trajectory is expected to continue into 2024, indicating a robust and expanding advertising landscape in the country.

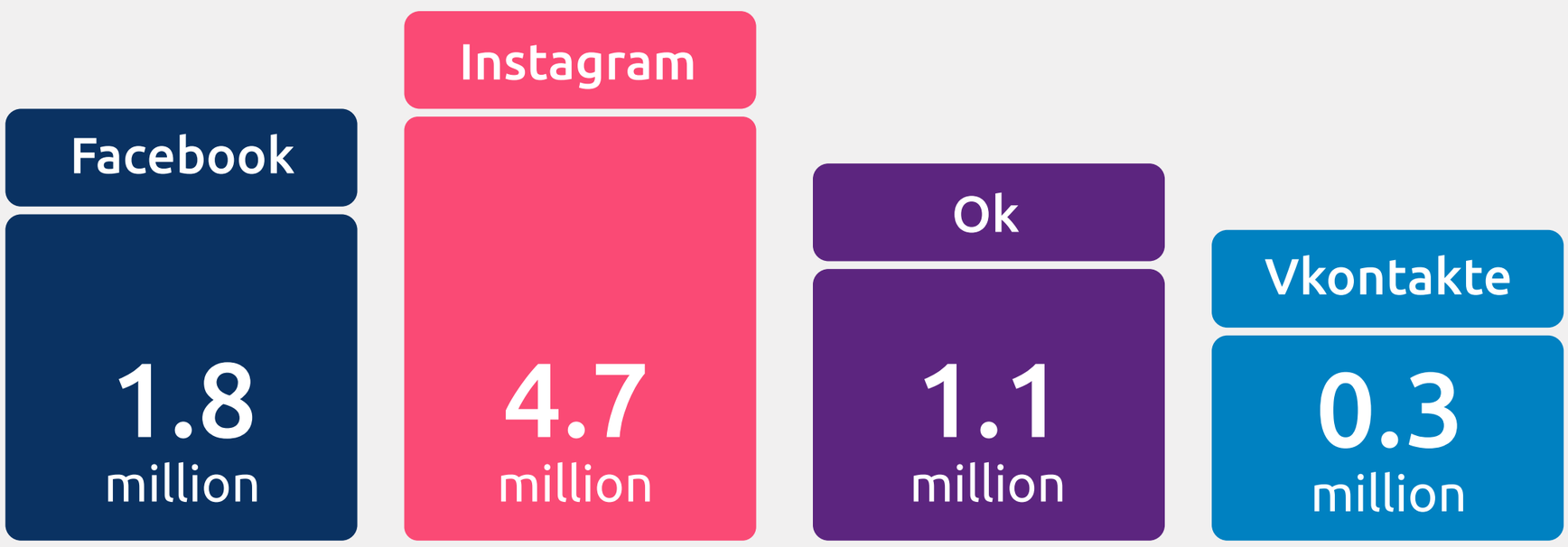
Estimated advertising costs UZS min

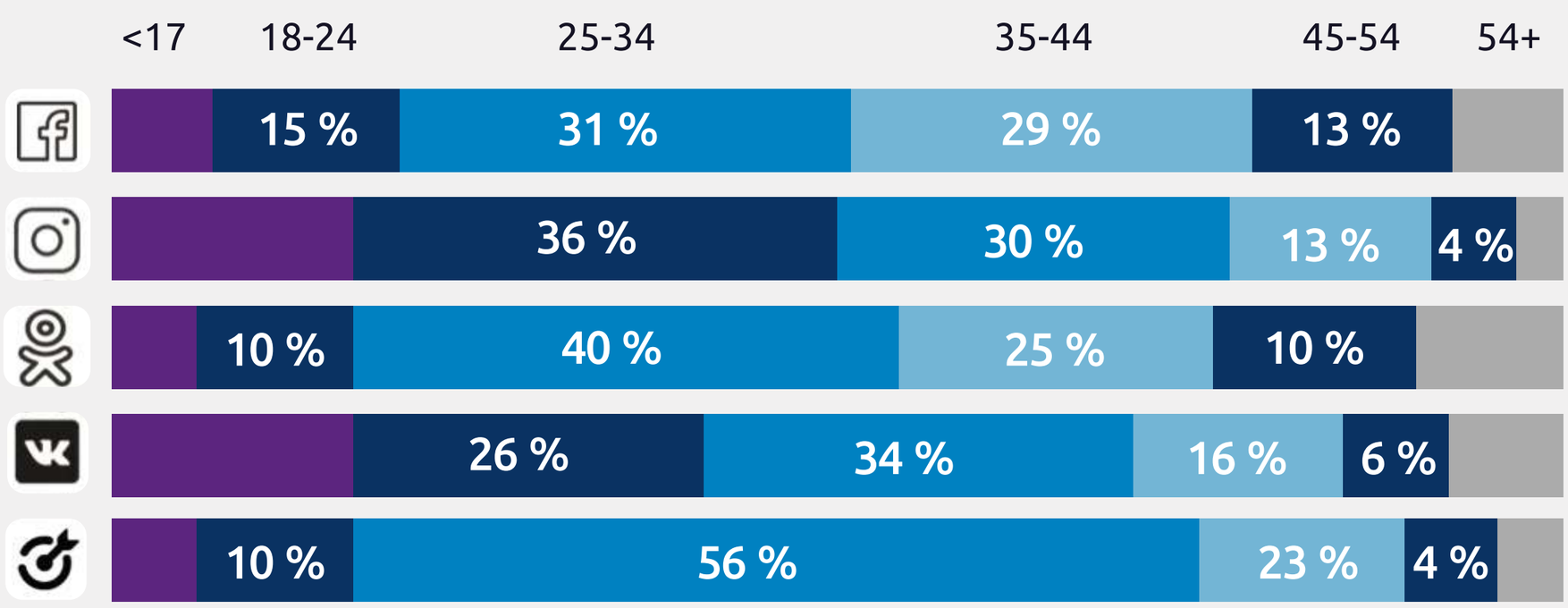


Digital structure in Uzbekistan

Population	Connecting to mobile	Internet users	Social media users
34.9 million ▲+1,6%	**31.84** million ▲+7,6%	**26.74** million ▲+1,6%	**9.0** million ▲ +44%
Urbanization **51%**	Of population **86,6%**	Of population **76,6%**	Of population **25%**

- 70% of social media users are registered as men which creates difficulties for targeting
- 76% of women use smartphones
- 55% of smartphone users are aged 20-39



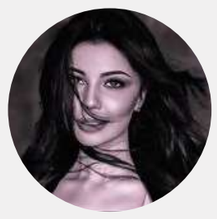
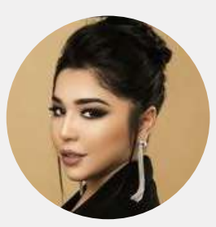


The Uzbek Digital Influencer Ecosystem

The Uzbek audience is uniquely characterized by its keen interest in news and active engagement within social networks. This trend is even evident in the Instagram* rankings, where figures like the politician Shavkat Mirziyoyev and media outlets such as Kun.uz feature prominently. This strong preference for news and communication is also the reason why TikTok's popularity in Uzbekistan is comparatively low, while platforms like VKontakte, Facebook*, and Odnoklassniki lead the pack. Telegram, in particular, enjoys widespread use, with 65% of Uzbekistan's internet users engaging daily and 76% monthly.

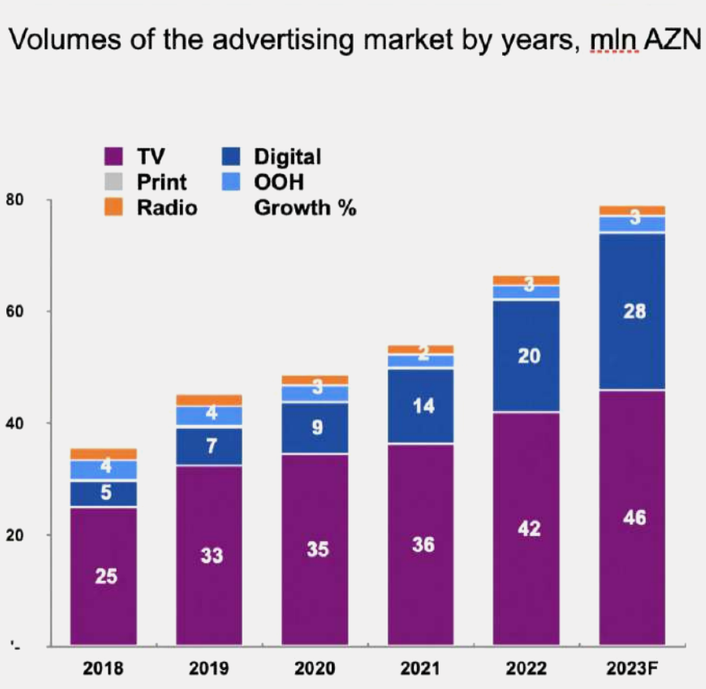
On Instagram*, the majority of accounts predominantly feature content in Uzbek, reflecting the region's preference for news-centric material. However, influencers like Shahzoda (@shahzodasinger) and Nazarov Yakhshi bola (@dili.me) often use Russian, catering to audiences more aligned with Russia. The top-ranked influencer, Otabek Umarov (@otabek_muhammadalievich), strategically employs both languages to maximize his reach and appeal to a broader audience.

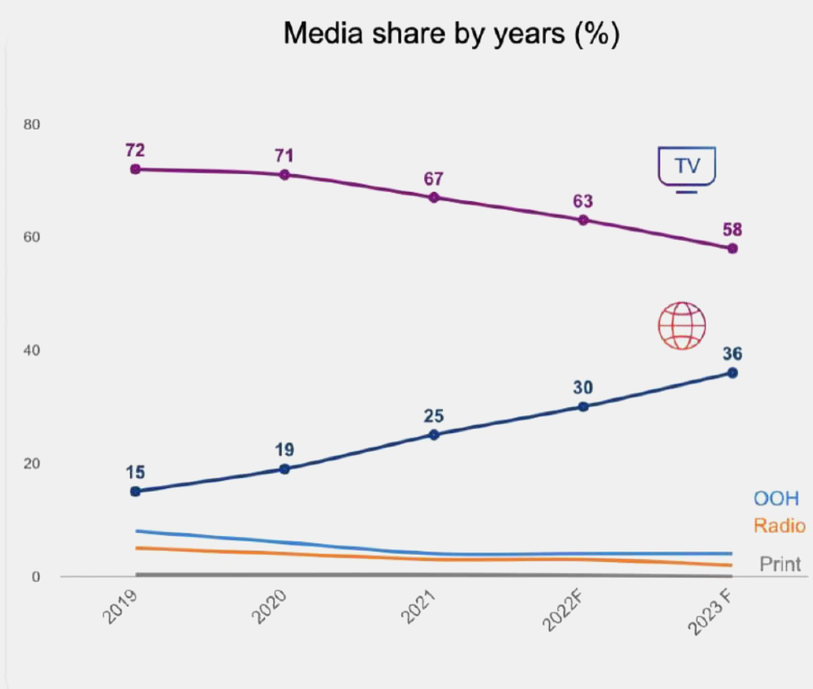
TOP-10 Uzbek Instagram* bloggers

	Blogger	Instagram* Link	Subscribers, mln
	1. Otabek Umarov	@otabek_muhammadalievich	30.4
	2. Sariq Bola	@jahongir_xojayev	5.8
	3. Shahzoda	@shahzodasinger	5.6
	4. Kun.uz	@kun.uz	5.3
	5. Shavkat Mirziyoyev	@mirziyoyev_sh	4.9
	6. Luiza Rasulova	@luiza_rasulova	4.6
	7. Jahongir Paziljonov	@jahongirpaziljonov	4.4
	8. Nazarov Yakhshi bola	@dili.me	4.4
	9. Ziyoda Qobilova	@ziyodamusic	4.3
	10. Blogger Kayumov	@doniyorkayumov1	3.9

6.3 Azerbaijan

Despite the traditional dominance of the TV advertising market, the digital segment is steadily gaining momentum with each passing year. In 2023, digital market growth increased by 8% compared to the year before. Definitely, it will only increase in 2024.





Population	Connecting to mobile	Internet users	Social media users
10.39 million	**11.92** million	**8.92** million	**4.15** million
Urbanization	Of population	Of population	Of population
57,4%	**114,8%**	**86%**	**40%**

Portraits of Internet users in Azerbaijan look as follows:

- 49% men, 51% women;
- the main audience is aged 25-44;
- 68,1% of mobile device users;
- 30,79% of desktop device users;
- 98,3% of the audience access social networks via mobile devices.

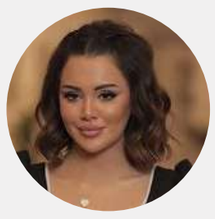
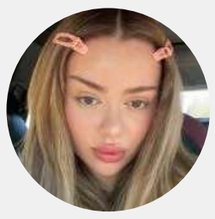
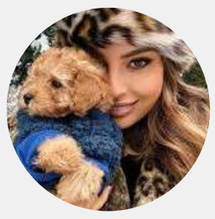
The Azerbaijan Digital Influencer Ecosystem

In the rankings of top Azerbaijani TikTok and Instagram* influencers, Elkhan Khalafov (Sheemamoto) stands out as the sole figure leading the charge in the Russian-language space. The rest of the creators tailor their content to resonate with their primary audience, using the Azerbaijani language.

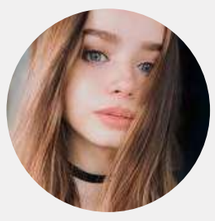
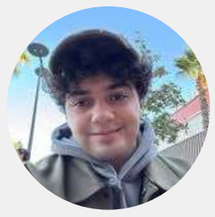
Top social networcs

3.25 mln users	1.5 mln users	670 K users	304.5 K users
39.1% reported ads reach 13+	18% reported ads reach 18+	8.9% Reported ads reach 18+	3.7% Reported ads reach 13+
-19.8% YoY Growth	-6.3% YoY Growth	21.8% YoY Growth	43.6% YoY Growth
40% | 60%	35% | 65%	37% | 63%	33% | 67%

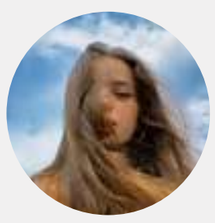
TOP Azerbaijani Lifestyle Bloggers Instagram*

Blogger	Instagram* Link	followers	estimated reach
	1. @lifeofvuss	118K	30.9K
	2. @hllyblog	688K	136.1K
	3. @nadjiba_	703K	131.2K
	4. @leila_land	607K	125.9K

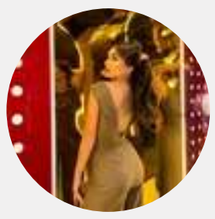
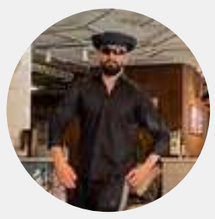
TOP Azerbaijani entertainment Bloggers Instagram*

	1. @nadjaf	257K	58.7K
	2. @sevarmamedova	165K	44.3K
	3. @ra_travellers	84.9K	20.1K
	4. @sheemamoto	84.5K	21.6K

TOP Azerbaijani Lifestyle Bloggers Tik-Tok

Blogger Tik-Tok Link	followers	average video view
 **1. @wefeg.m**	198.2K	300K
 **2. @sevarmamedova**	99.9K	80K
 **3. @nadjiba_**	110.9K	80-100K
 **4. @leila.land**	25K	60K

TOP Azerbaijani entertainment Bloggers Tik-Tok

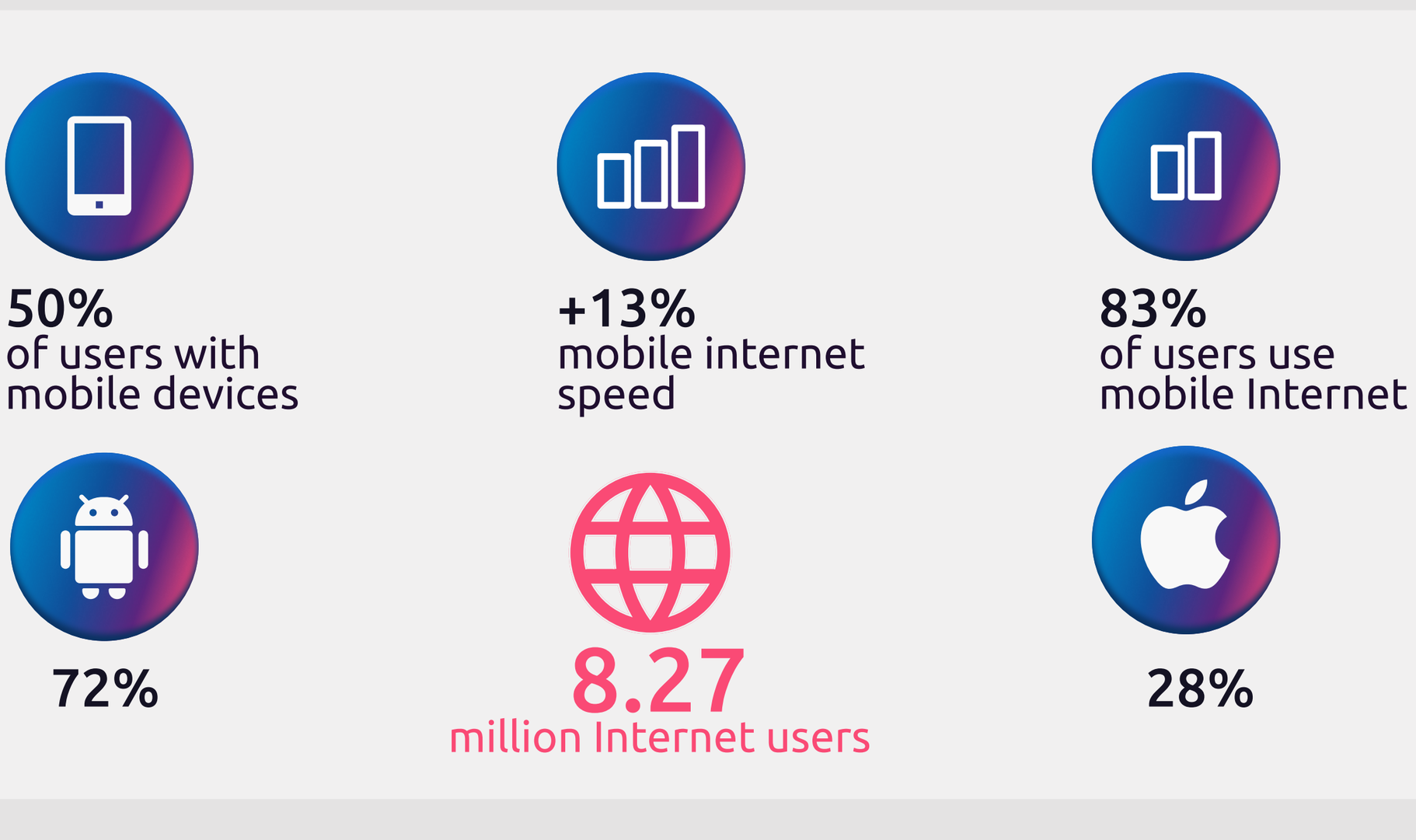
 **1. @shams_all**	307.9K	200K
 **2. @ilkin_khalil**	229.3K	150-200K
 **3. @a1xan**	139.2K	500K
 **4. @therealmarkkim**	124K	50K

6.4 Belarus

In recent times, the advertising landscape in Belarus has been facing challenges. The exit of large international corporations from the country has led to reduced budgets across all major advertising mediums.

However, there's a silver lining: the digital domain has been resilient amidst these shifts and continues to experience growth. Just two years ago, internet advertising accounted for 46% of the market in Belarus, and this figure rose to 54% last year. The internet is progressively taking over from television, which currently holds 23%, and radio and outdoor advertising, each holding 11%.

Several international brands have shifted their focus away from outdoor and TV advertising, reallocating their budgets towards digital platforms, especially YouTube. Furthermore, Belarusian users are showing a preference for the Internet over classic media, indicating a significant shift in the country's advertising dynamics.



Last year witnessed a 13% increase in mobile internet speeds across the country, setting the stage for a predicted surge in the mobile advertising sector. There's also a noticeable shift in user behavior, with a decline in the use of traditional search engines.

44% of internet users now turn to social networks for information, a figure that rises to 48% among those under 26 years old.

This shift underscores the growing influence of social media as a primary source of information for a significant portion of the internet-savvy Belarus population.

TOP Social Media in Belarus

Pinterest	Instagram	Facebook	YouTube	Twitter	VKontakte
21.78%	18.4%	18.15%	17.05%	12.26%	5.97%

The Belarus Digital Influencer Ecosystem

The Instagram* influencer scene in Belarus is marked by a range of interests among its users. Topping the list is the renowned athlete Chingiz Allazov (@chingizallazov). The lineup also includes notable figures like Maxim Krupeichenko (@krypeichenko), director of the Belarusian Metallurgical Plant, socialite Vlad Belousov (@belousov10), the travel-focused Poznay Kobrin (@kobrintour.by), and the informative State of Emergency Belarus account (@cpbelarus). Additionally, car enthusiast Den (@den100del), beauty blogger Valentina (@valentina.safronova), popular brand Mark Formelle (@markformelle), and the Mila store chain (@milashop_official) are among the favorites.

These influencers predominantly maintain their profiles in Russian, aligning with the linguistic preference of the majority of the Belarusian audience. Standing out in this landscape is Eurovision 2018 participant Andi Taranik (@anditaranik), who broadcasts his content in both Russian and English. His strategy is clearly aimed at captivating a potential European audience, showcasing a blend of local appeal and international outreach.

Belarusian YouTube is led by the likes of Vlad Paper A4 and Glent, channels that also enjoy significant popularity in Russia. The remainder of the Top-10 splits into two main genres: entertainment and gaming.

In the realm of entertainment, channels like Lesha Maisak, Vladislav Shudeyko, and musicians Dim Dimych and Kobyakov echo the style of A4.The Dexter channel offers a unique twist with its reality show-style content, standing out from the conventional entertainment lineup. On the gaming front, the Top-10 features Biskas, known for Minecraft content; TicTac, who focuses on Standoff2; and Cool Games, where Pavel delves into computer and mobile game reviews.

All these content creators favor Russian for their narration, catering not just to the Belarusian audience but also to a wider Russian-speaking demographic, including viewers from Russia.

TOP-10 Belarus Instagram* Bloggers

	Blogger	Instagram* Link	Subscribers followers
	1. **Chingiz Allazov**	@chingizallazov	5.8M
	2. **Mark Formelle**	@markformelle	1.1M
	3. **Maxim Krupeichenko**	@krypeichenko	1.0M
	4. **Andi Taranik**	@anditaranik	1.0M
	5. **Vlad Belousov**	@belousov10	967K
	6. **Recognise Kobrin**	@kobrintour.by	936K
	7. **PE Belarus ■ stay informed**	@cpbelarus	819K
	8. **Den**	@den100del	749K
	9. **Valentina**	@valentina.safronova	776K
	10. **Mila shop chain**	@milashop_official	682K

TOP-10 Belarus YouTube Bloggers

	Blogger	Subscribers mln
	1. A4	51,1
	2. Glent	18,2
	3. Vladislav Shudeyko	7,2
	4. Lesha Maisak	7,1
	5. Dim Dimych	6,3
	6. TicTac	5,9
	7. Biskas	5,8
	8. Dexter	5,4
	9. Kobyakov	3,6
	10. Cool games	3,2

Conclusions

As the Russian&CIS markets continue to evolve in their unique trajectories, distinct from the broader global influencer marketing trends, understanding these changes becomes crucial for any brand or business looking to engage effectively in these regions. The shift towards local platforms and the nuances of audience preferences in Russia&CIS needs a personal approach, one that respects the trends and digital landscapes of these markets.

In navigating these complex environments, the experience of the RMAA agency becomes invaluable. Specializing in developing bespoke marketing strategies, selecting the most impactful influencers, and managing the multifaceted aspects of influencer marketing, RMAA is poised to guide businesses through the intricacies of these dynamic markets. Their deep understanding of local trends, coupled with a strategic approach, ensures that your brand can connect with audiences in Russia&CIS.

RMAA

RMAA helps brands refining their marketing strategies and selecting the right influencers to achieve their objectives within the Russian and CIS markets.

Contact the RMAA team by email

office@rmaa.agency

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