Online Gaming Segment Overview

Q3 2015
Segment Volumes

- Query dynamics
- User interest growth in regions
- Category growth forecast
Segment dynamics: ‘Online gaming’

Yandex data, Jun 2015, Geo – Russia
Interest towards category in the regions: CIS, Russia

Seasonal variations are common in all regions.

Yandex data, Jun 2015, Geo – Russia+CIS
Interest towards category in Russian regions

Yandex data, Jun 2015, Geo – Russia+CIS
Online Games’ Genres

- User interest by genre
- Dynamics of user interest by genre
User interest by genre

The impression share of RPG however decreased in spring 2015 to 44% vs 48% in summer 2014. The Action games impression share has slightly increased by 3% in spring 2015. The impression share of Strategy games varies between 12% and 13%.

Yandex data, Jun 2015, Geo – Russia
User interest growth in genre games

Million Impressions

-6%  June ’13 – May ’14
-3%  June ’14 – May ’15

RPG
ACTION
STRATEGY

Yandex data, Jun 2015, Geo – Russia
User interest by genre

The majority of impressions in genres are triggered by brand queries (i.e. Minecraft). In Strategy and RPG genres generic queries have a bigger impression share than in Action games.

Yandex data, Jun 2013 – May 2015, Geo – Russia
Interest towards RPG, Action and Strategy genres

Interest dynamics is very similar for all genres

Yandex data, Jun 2015, Geo – Russia
RPG online games

• Subgenres of RPG
Subgenres of RPG

Yandex data, Jun 2015, Geo – Russia
Subgenres of RPG

Million Impressions

<table>
<thead>
<tr>
<th>Genre</th>
<th>June ’13 – May ’14</th>
<th>June ’14 – May ’15</th>
</tr>
</thead>
<tbody>
<tr>
<td>MMORPG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SENDBOX</td>
<td></td>
<td>-3%</td>
</tr>
</tbody>
</table>

Yandex data, Jun 2015, Geo – Russia
Most popular MMORPG games

Yandex data, Jun 2015, Geo – Russia

- TES SKYRIM
- World of Warcraft
- Origins
- Fallout Online
- ArcheAge
- Diablo Online
- FORCED
- Копатель Онлайн
- Lineage
- Аллоды Онлайн
- Neverwinter
- Star Wars: The Old Republic
- Драконы
- Perfect World
User interest: growth in MMORPG games

Yandex data, Jun 2015, Geo – Russia
Strategy online games

• Subgenres of Strategy
Subgenres of Strategy

Million Impressions

Yandex data, Jun 2015, Geo – Russia
Subgenres of Strategy

Million Impressions

<table>
<thead>
<tr>
<th>Subgenre</th>
<th>June ‘13 – May ‘14</th>
<th>June ‘14 – May ‘15</th>
</tr>
</thead>
<tbody>
<tr>
<td>MOBA</td>
<td></td>
<td>+17%</td>
</tr>
<tr>
<td>STRATEGY</td>
<td>-9%</td>
<td></td>
</tr>
<tr>
<td>MANAGER</td>
<td>+1%</td>
<td></td>
</tr>
<tr>
<td>CARDGAME</td>
<td></td>
<td>+59%</td>
</tr>
</tbody>
</table>

Yandex data, Jun 2015, Geo – Russia
Most popular MOBA games

Million Impressions

Yandex data, Jun 2015, Geo – Russia
Most popular MOBA games (without DotA 2)

Yandex data, Jun 2015, Geo – Russia

Thousand Impressions

- League of Legends
- Prime World
- SMITE
- SMITE
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## User interest in MOBA games

### Million Impressions

<table>
<thead>
<tr>
<th>Game</th>
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<th>June ’14 – May ’15</th>
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<tr>
<td>DotA 2</td>
<td>30</td>
<td>35</td>
</tr>
<tr>
<td>League of Legends</td>
<td>-5%</td>
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</tr>
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</tr>
<tr>
<td>SMITE</td>
<td>+62%</td>
<td>+62%</td>
</tr>
<tr>
<td>Heroes of the Storm</td>
<td>+247%</td>
<td>+247%</td>
</tr>
<tr>
<td>Heroes of newerth</td>
<td>-26%</td>
<td>-26%</td>
</tr>
<tr>
<td>NOVA 2</td>
<td>+30%</td>
<td>+30%</td>
</tr>
<tr>
<td>Demigod</td>
<td>-4%</td>
<td>-4%</td>
</tr>
<tr>
<td>Infinite Crisis</td>
<td>-10%</td>
<td>-10%</td>
</tr>
<tr>
<td>Bloodline Champions</td>
<td>-30%</td>
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</tr>
</tbody>
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Yandex data, Jun 2015, Geo – Russia
User interest in MOBA games (without DotA 2)

Million Impressions

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Yandex data, Jun 2015, Geo – Russia
Most popular Strategy games

Impressions

Yandex data, Jun 2015, Geo – Russia
User interest growth in Strategy games

Yandex data, Jun 2015, Geo – Russia
Online Game Types

- Browser vs Client types
- Platform types
- Contribution model types
Queries on client games make up approximately 83% of all searches on online gaming.

Yandex data, Jun 2015, Geo – Russia
Most queries in the segment are related to PC games.

Yandex data, Jun 2015, Geo – Russia
Users interest growth by platforms games

Million Impressions

<table>
<thead>
<tr>
<th>Platform</th>
<th>June ’13 – May ’14</th>
<th>June ’14 – May ’15</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC games</td>
<td></td>
<td>+3%</td>
</tr>
<tr>
<td>Mobile</td>
<td>-9%</td>
<td></td>
</tr>
<tr>
<td>Game consoles</td>
<td>-5%</td>
<td></td>
</tr>
</tbody>
</table>

Yandex data, Jun 2015, Geo – Russia
Online games popularity by contribution model

Buy-2-play
(Minecraft, GTA Online)

Free-2-play
(World of Tanks, Counter Strike, Танки онлайн)

Pay-2-play
(World of Warcraft, Diablo, EVE)

Freemium games
include mostly games for mobile platforms

Yandex data, Jun 2015, Geo – Russia
User interest growth by contribution model

Yandex data, Jun 2015, Geo – Russia

Million Impressions

- Free-2-play
- Buy-2-play
- Pay-2-play
- Freemium

June '13 – May '14
June '14 – May '15

-6%  -4%  -13%  -6%
Brand Queries
Dynamics requests for online games brands

Yandex data, Jun 2015, Geo – Russia

Million Impressions
Dynamics requests for online games brands (excluding highest search result)

Yandex data, Jun 2015, Geo – Russia
Users interest growth for online games brands

Yandex data, Jun 2015, Geo – Russia
Search Patterns

- Various writings of games’ titles
- Queries for gaming-related terms
58% of users’ queries for online games are in Russian. Other 42% use queries in English. Only 55% of queries include original title of online game. 45% of queries include slang, abbreviations and short titles.

Yandex data, Jun 2015, Geo – Russia
Queries made by users searching for gaming-related terms

- Installation, downloads, clients: 38.0%
- Learning, lets-play, guides, videos, cheats: 9.1%
- Updates, patches, mods: 9.9%
- Registration, servers: 15.1%
- Gaming universe: other (maps, skins, weapon etc.): 24.1%
- Additional interest (screenshots, wallpapers, music etc.): 2.8%
- Gaming universe: heroes (abilities, experience, level up): 0.7%
- Gaming universe: social (races, clans, guilds): 0.3%

Yandex data, Jun 2015, Geo – Russia
The following sources have been used for this analytical review:

• Yandex Data

• Computer game genre classification – [http://gamesisart.ru/TableJanr.html](http://gamesisart.ru/TableJanr.html)

Thank you!