



# Online Gaming Category Overview

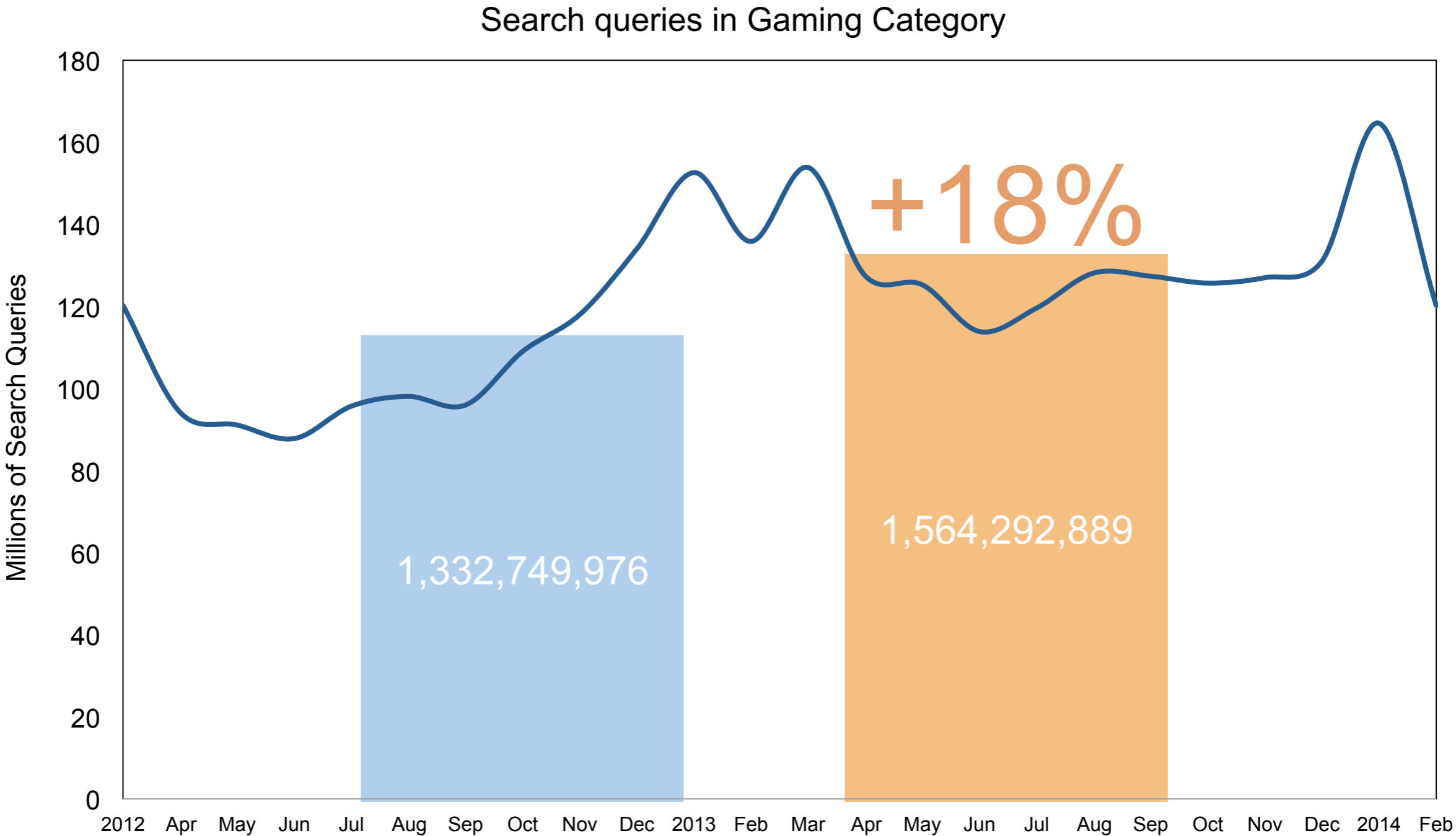
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# Segment Volumes

- ✓ Query dynamics
- ✓ User interest growth in regions
- ✓ Category growth forecast

# Search queries in Gaming category increased by 18%



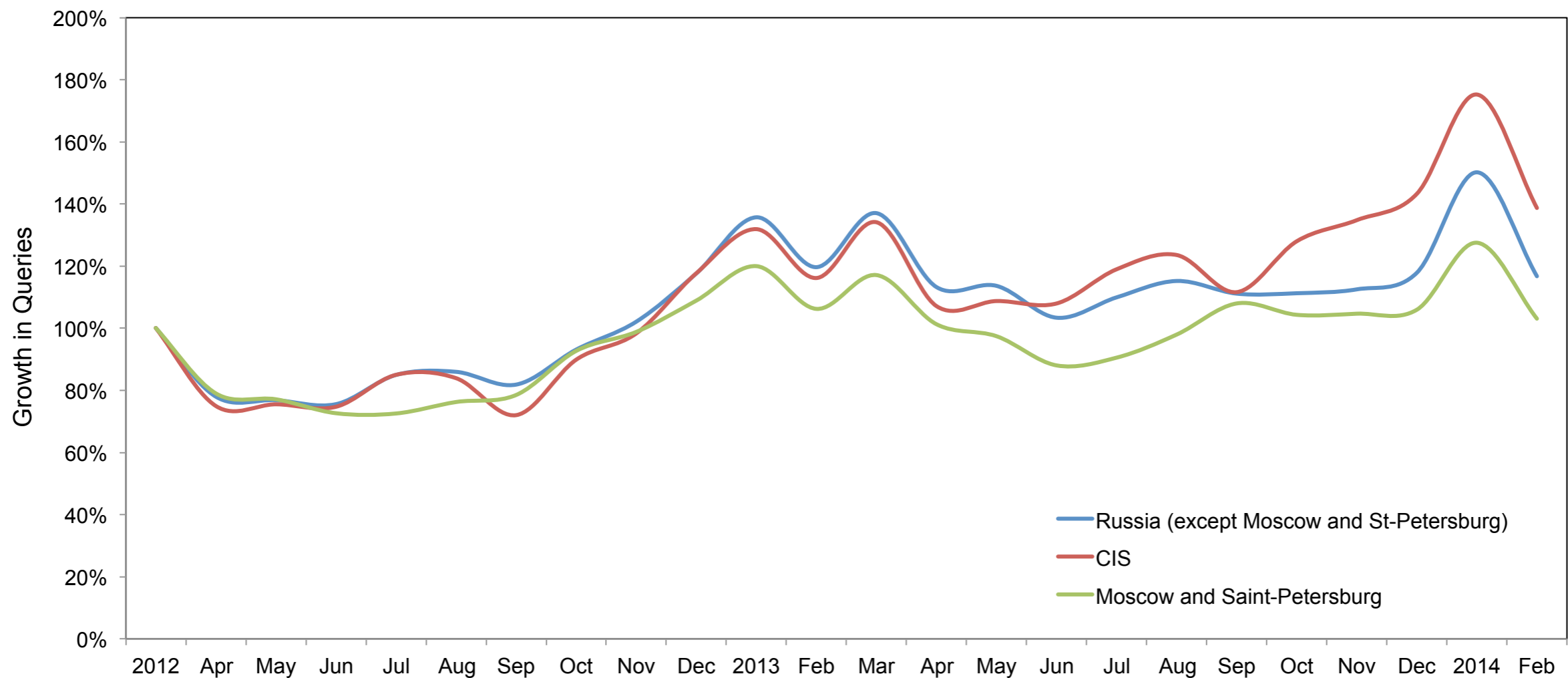
Comparison Period: Mar'12 - Feb'13 and Mar'13 - Feb'14.

# Fastest growth came from areas outside Moscow & St Petersburg

Over the last 12 months the number of queries on online gaming increased:

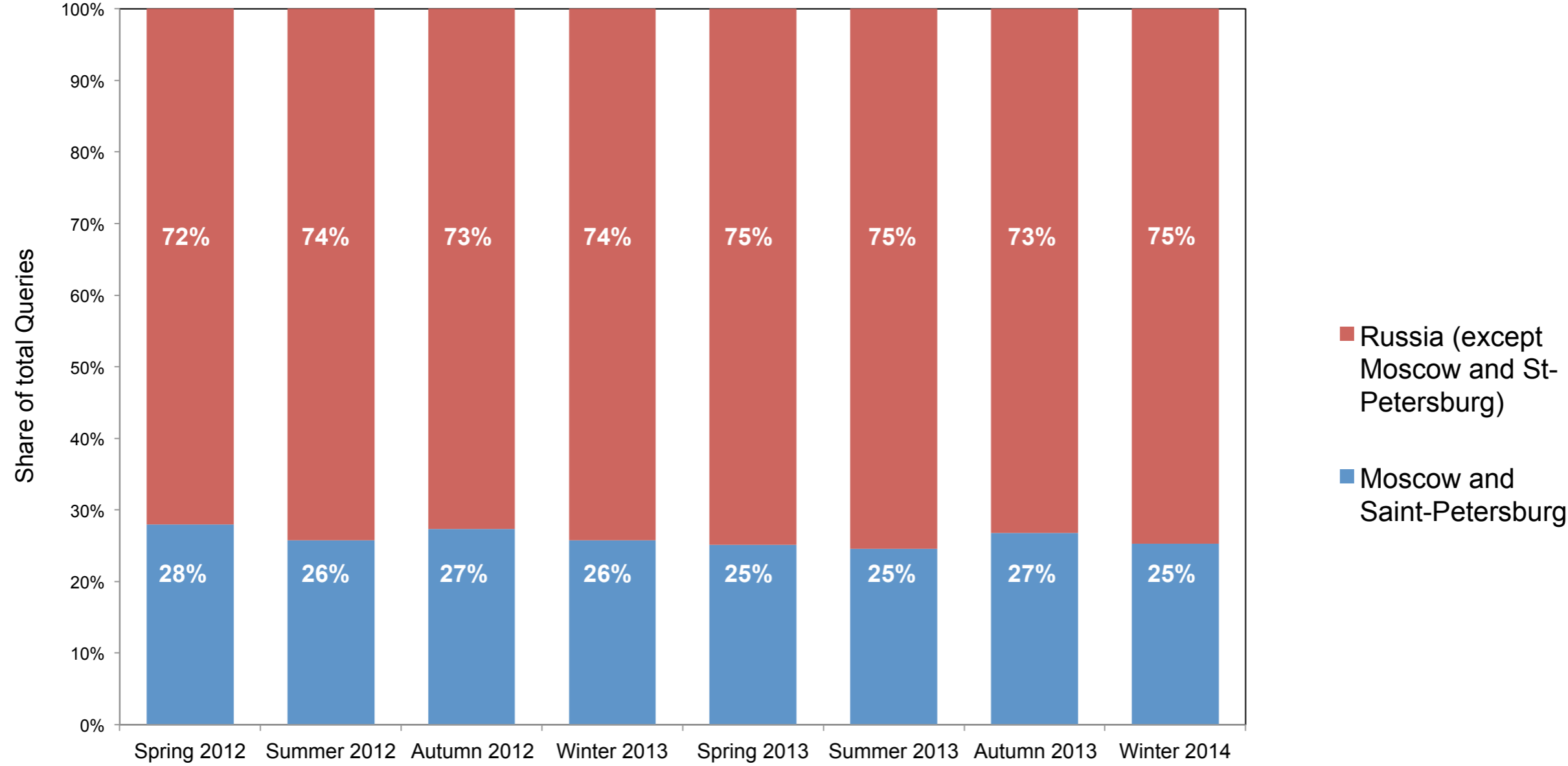
- In Moscow and St-Petersburg by 15%
- In Russian regions (except Moscow and St-Petersburg) by 23%;
- In CIS-countries (except Russia) by 37%.

Search queries in Gaming Category



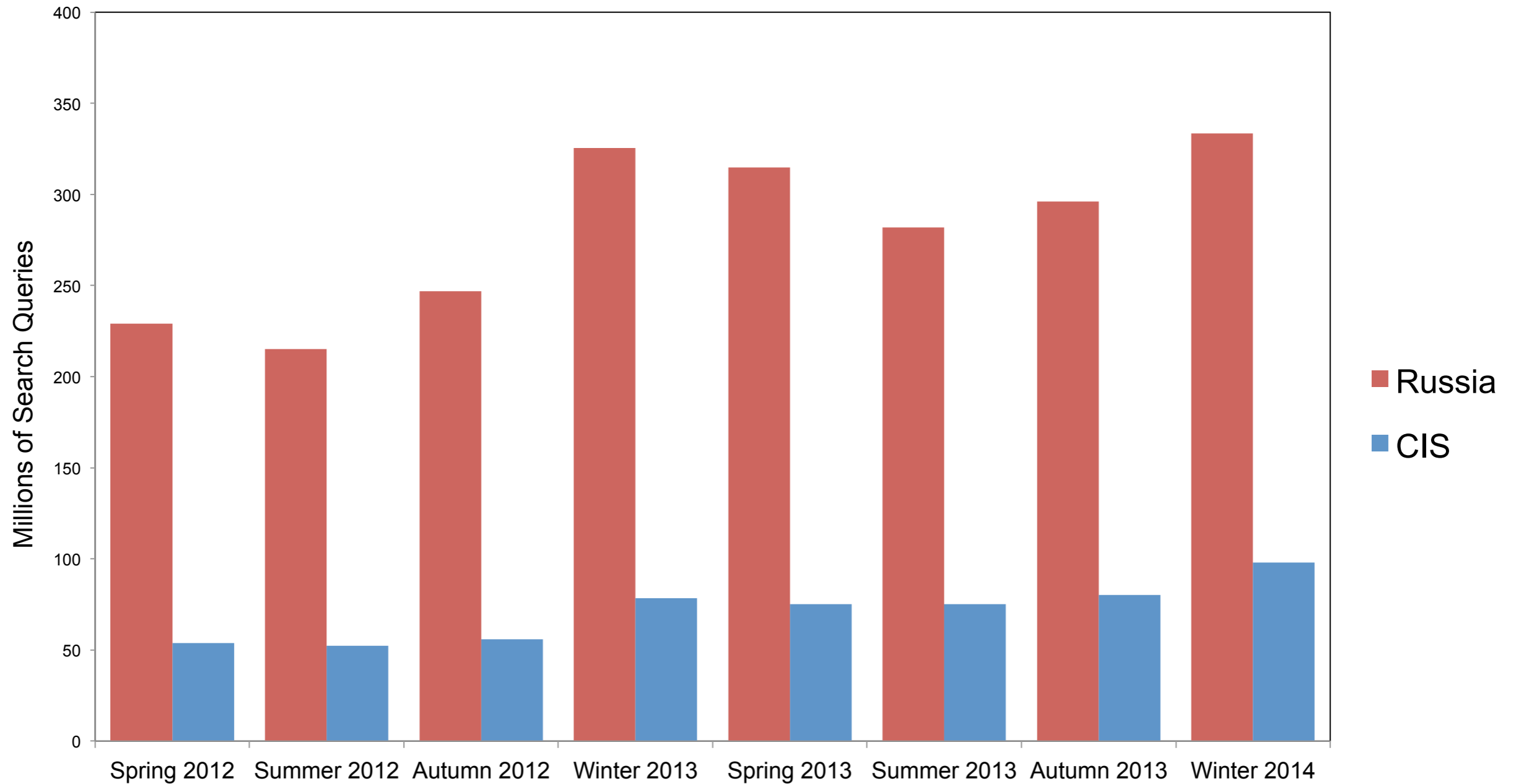
# Overall share of queries is decreasing in big cities

Share of Search Queries: Cities vs Regions



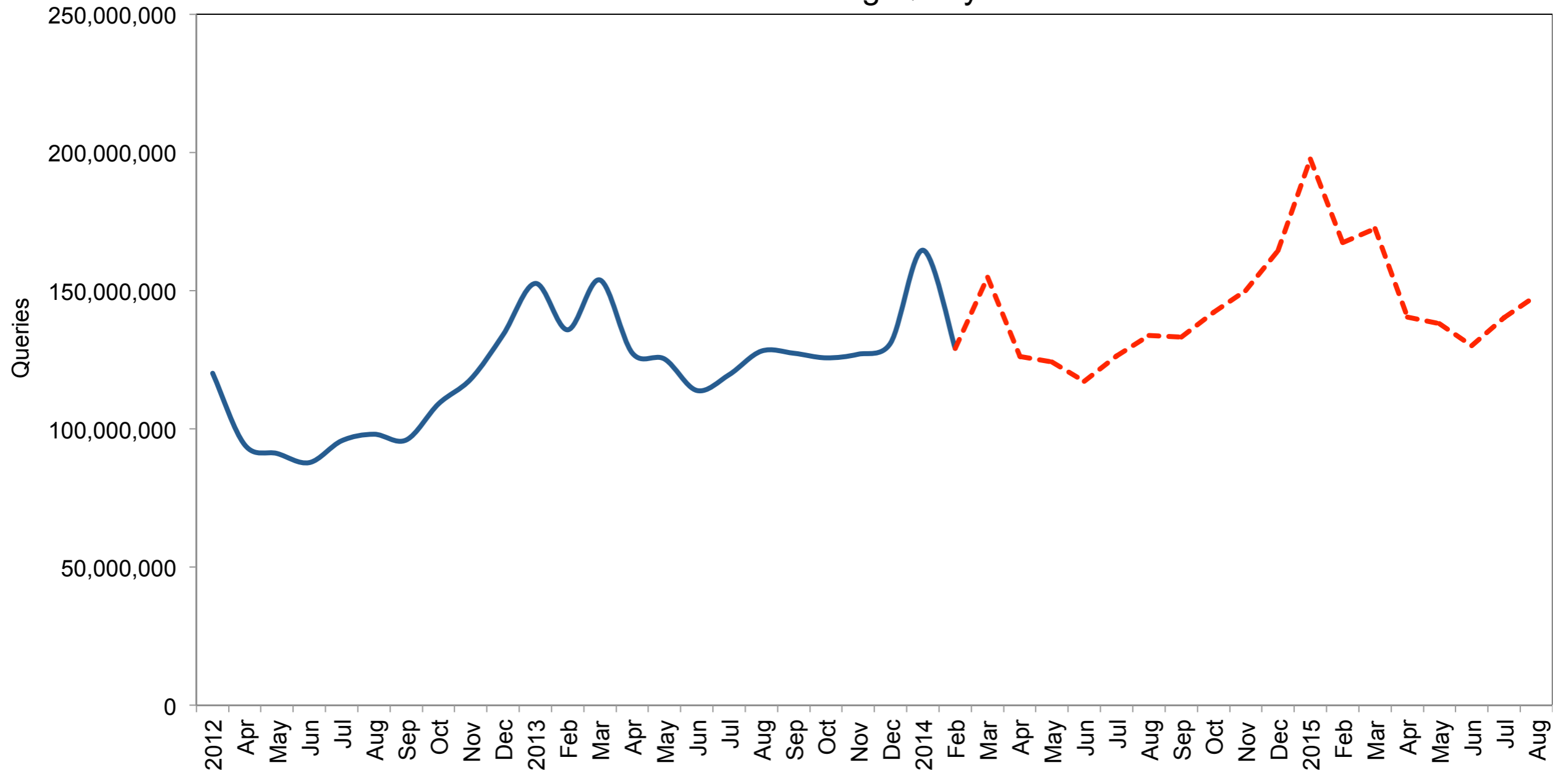
# Winter is peak season for gaming queries

Seasonality of Gaming Search Queries: Russia vs CIS



# Solid query growth forecast through 2014 and 2015

## Forecast for Gaming Query Growth



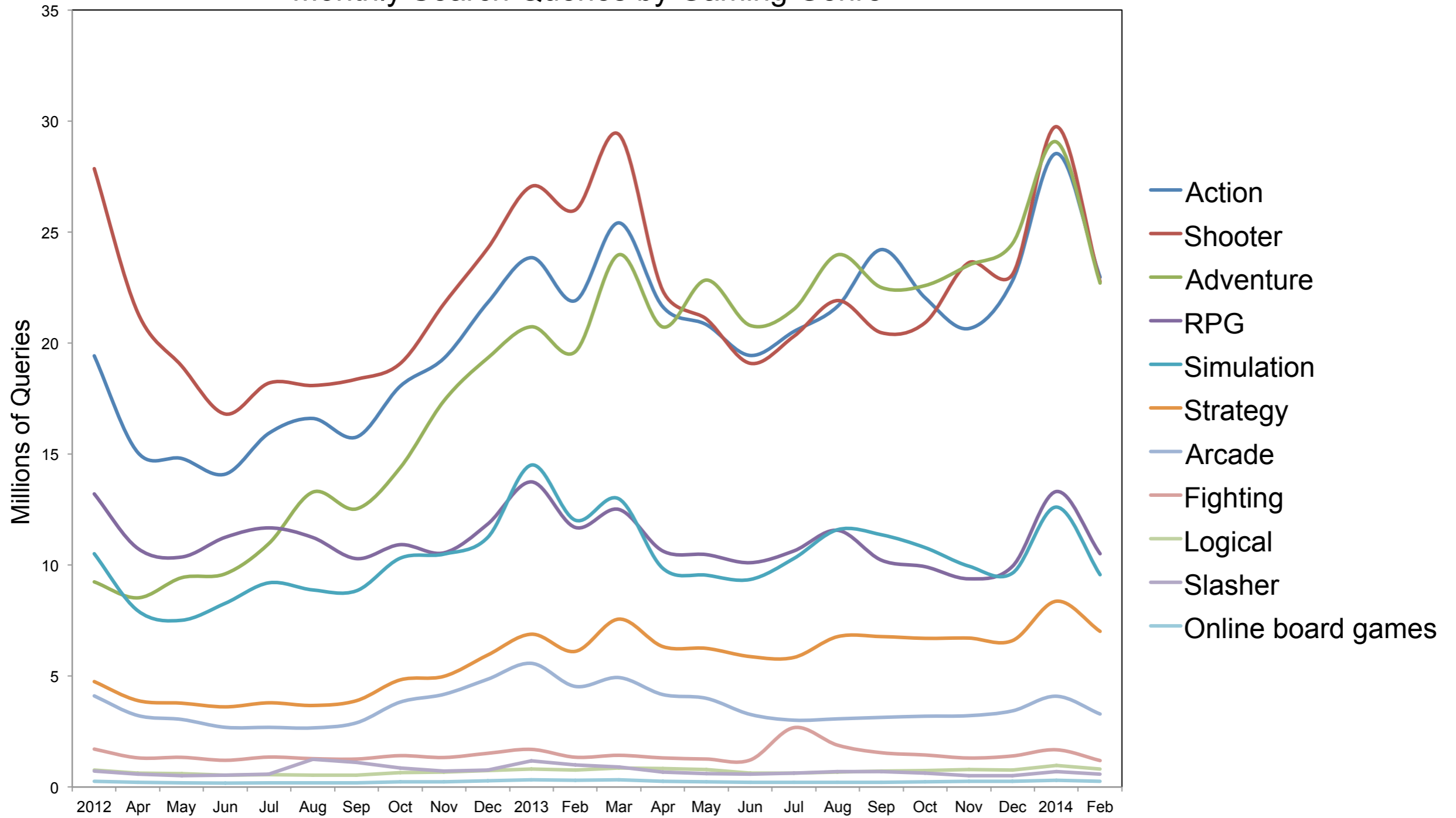
# Online Games by Genre

- ✓ Most popular games genres
- ✓ User interest growth in genres
- ✓ Interest towards MMO games

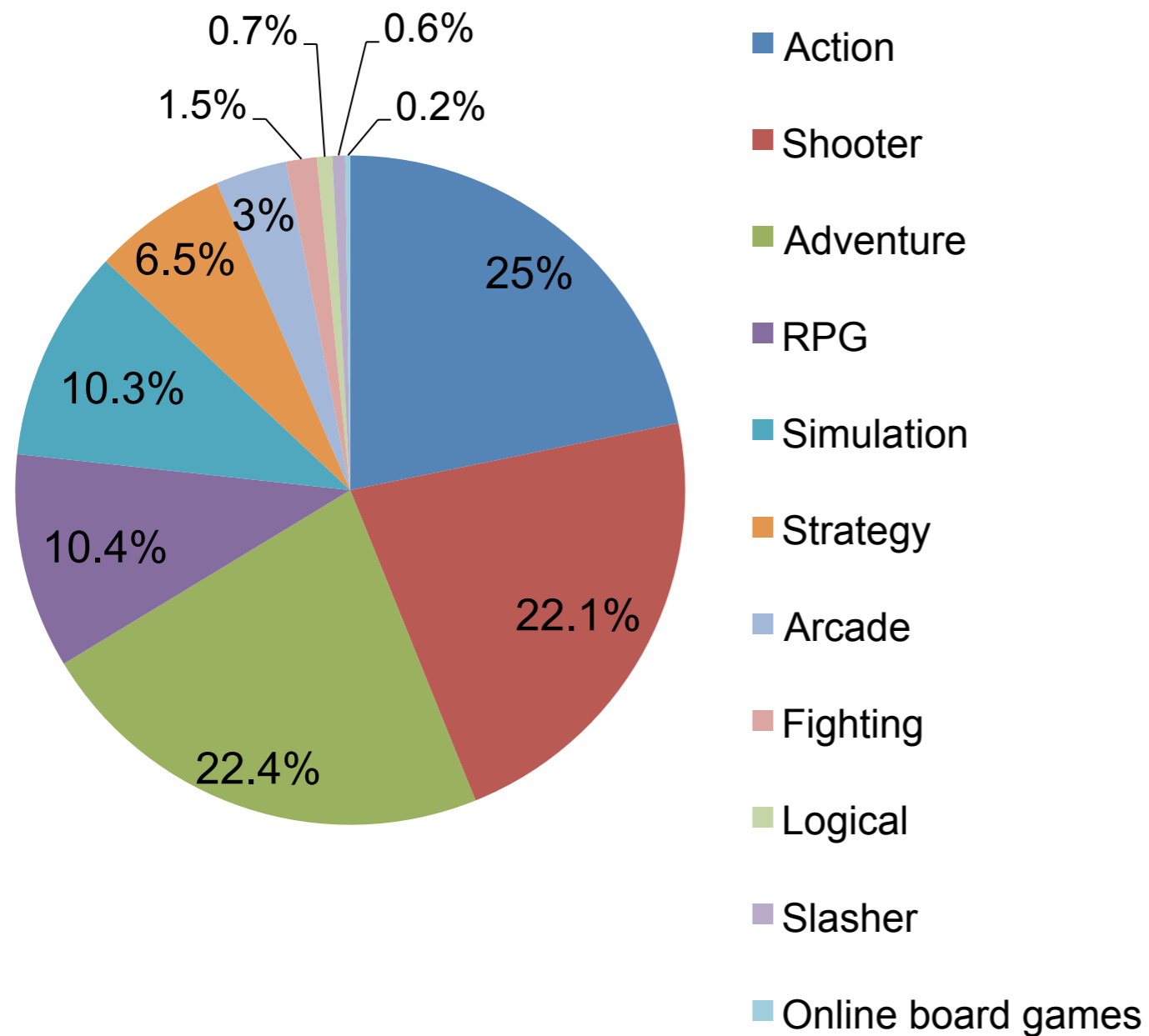


# Action, Shooter and Adventure games dominate

## Monthly Search Queries by Gaming Genre



# Action, Shooter and Adventure make up almost 75% of interest



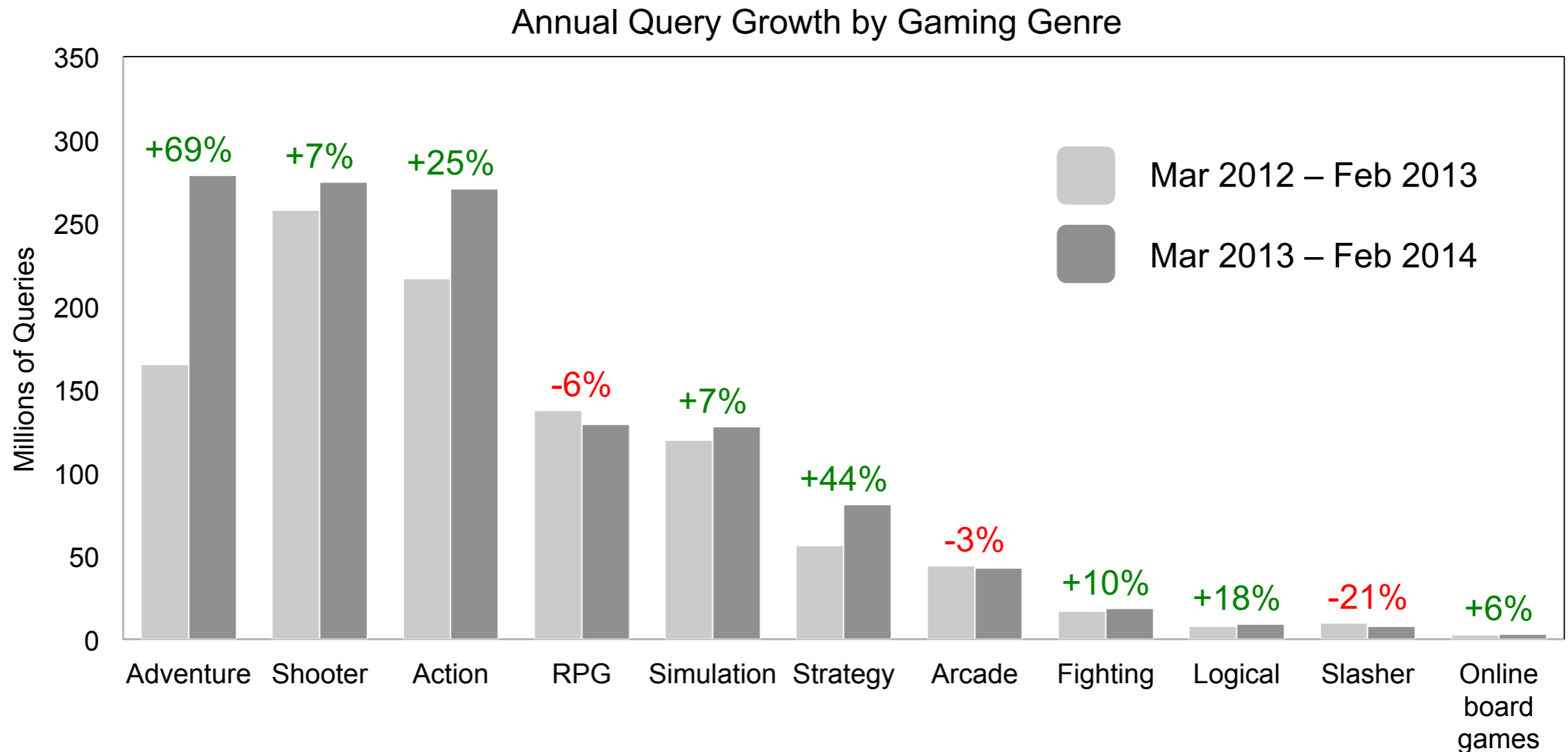
The main interests of users are divided among three genres. The interest in genre is heavily driven by specific branded titles.

For example, these titles exemplify the top categories:

- Action – World of Tanks
- GTA Shooter – Counter Strike, Warface,
- Adventure – Minecraft

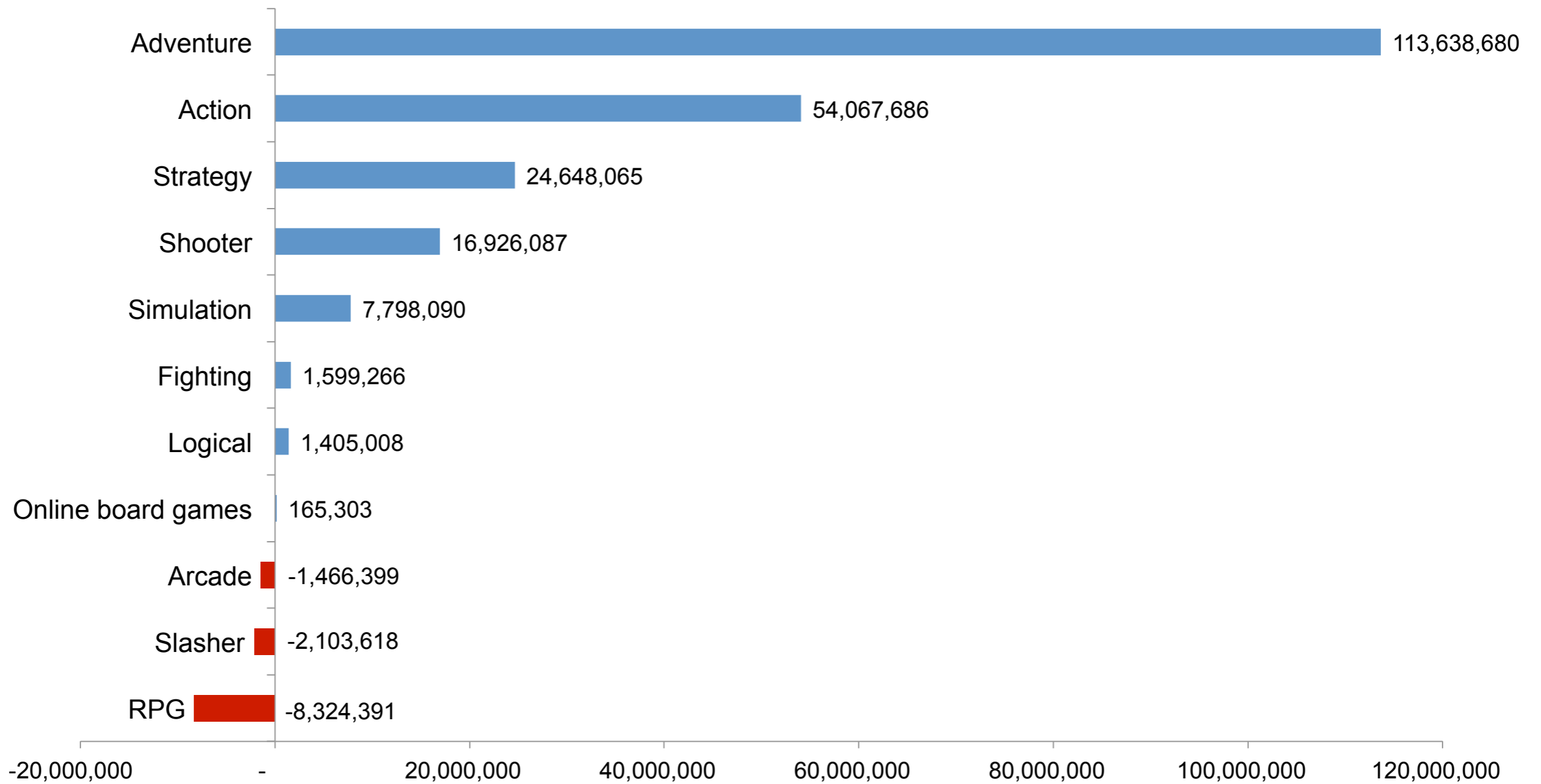
Generic queries for the most popular genres make up no more than 3-7% of the total volume.

# Strong growth is seen in many of the genres

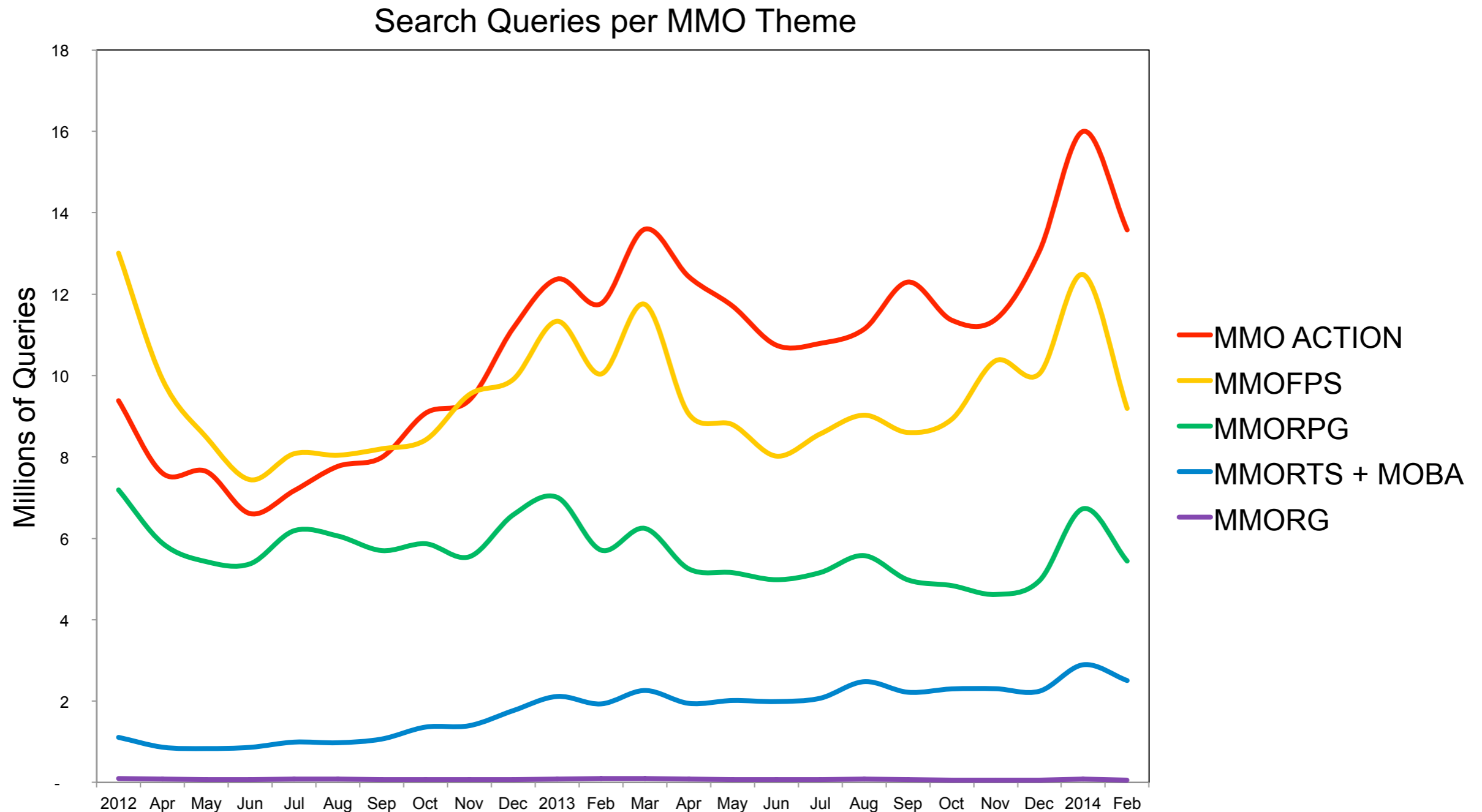


Dynamics by percent. Adventure increased by 69%, mainly from the growth of interest in the game Minecraft. Interest towards RPG fell by 6% due to the decreased interest by generic search toward mmorpg, but also a reduced interest in the games WOW and Lineage. However, there is a tendency of growing interest in mmorpg – Archeage.

# Absolute annual query growth by Gaming Genre



# MMO Action is the largest and fastest growing area

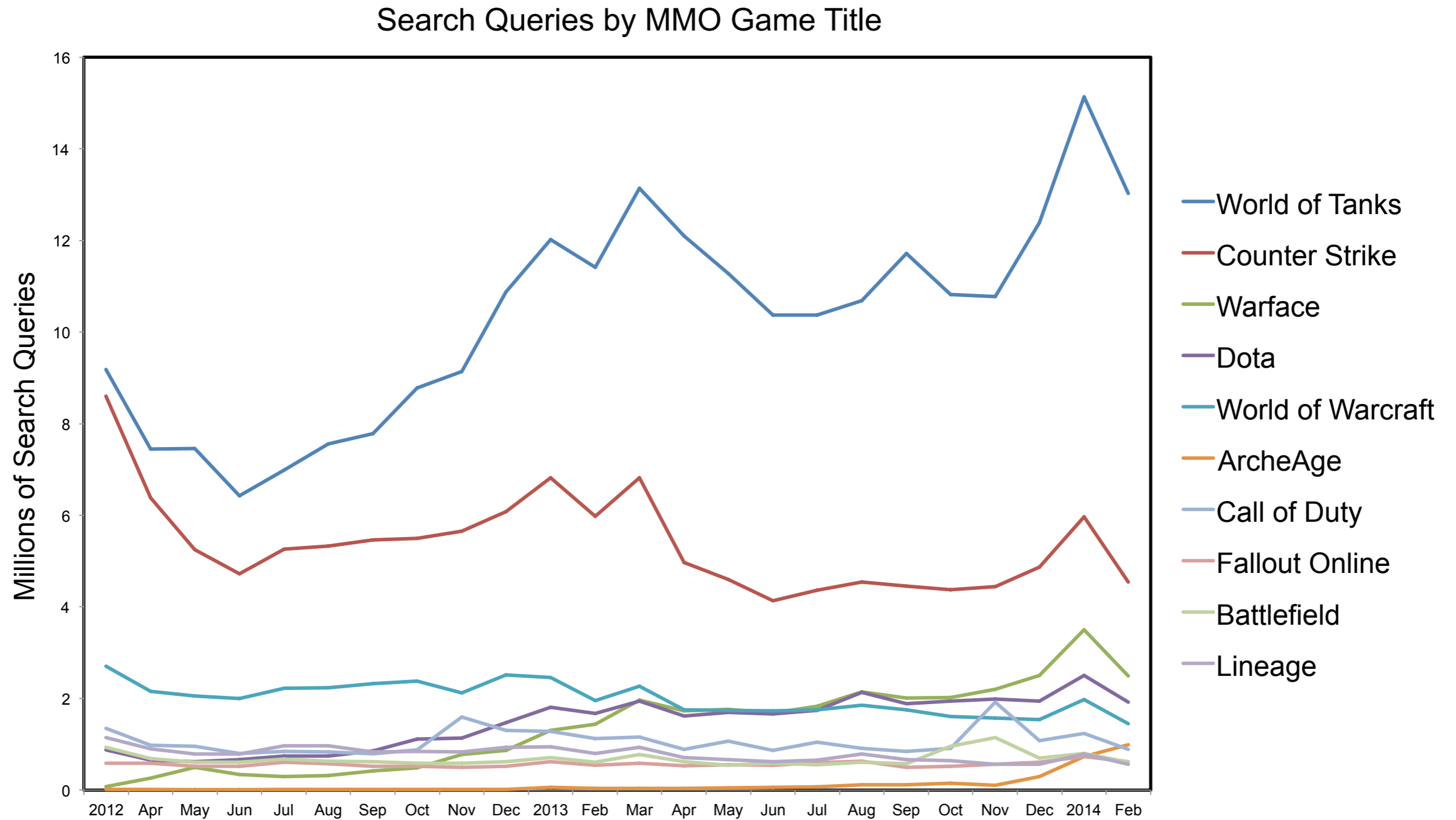


The most popular type of Massively Multiplayer Online Games is MMO Action, representing games like World of Tanks, World of Warplanes, War Thunder.

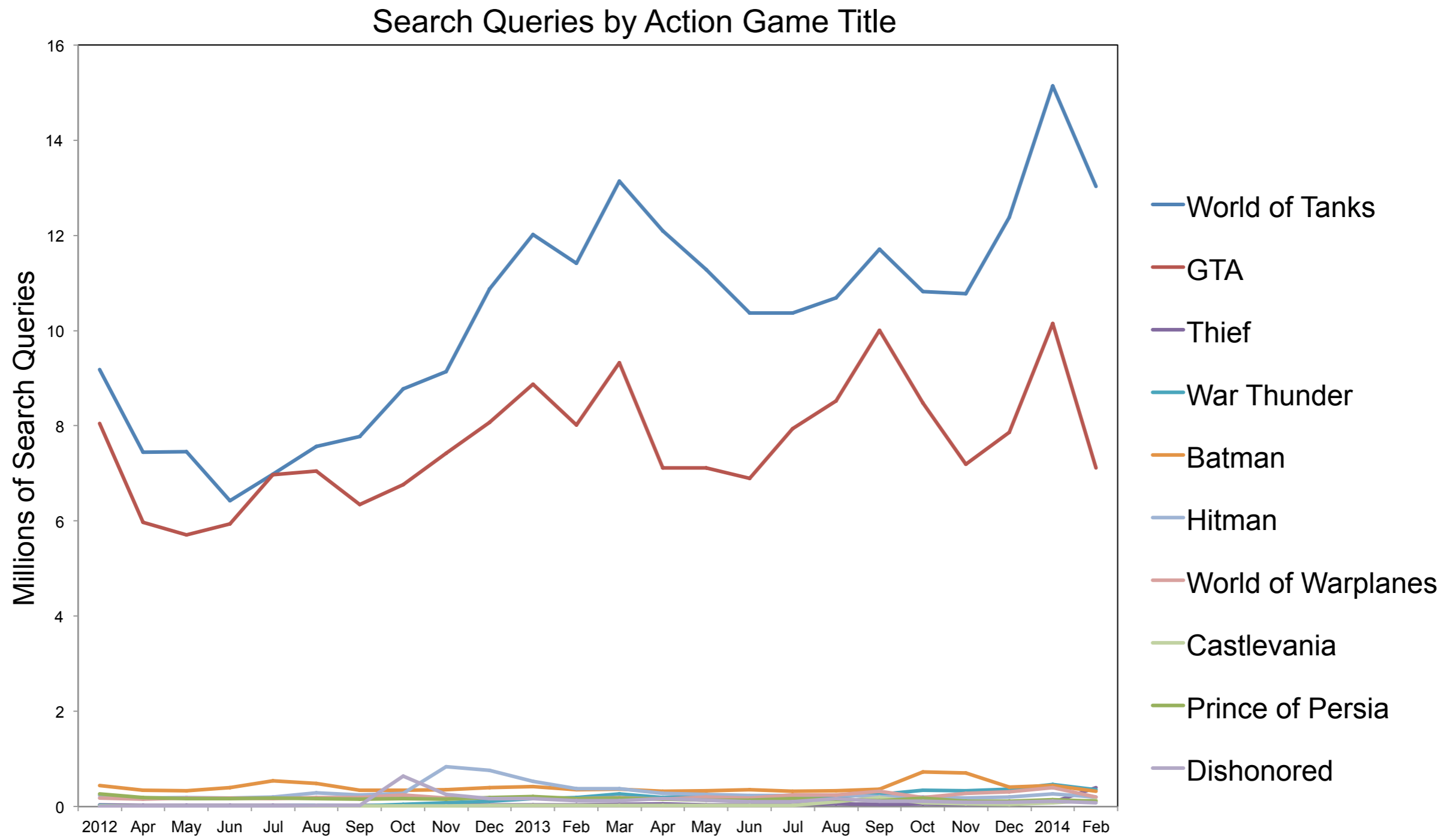
# Online Games

- ✓ TOP online games
- ✓ Browser vs Client games
- ✓ Online games popularity by platforms
- ✓ Online games popularity by contribution model

# World of Tanks is by far the most popular MMO game



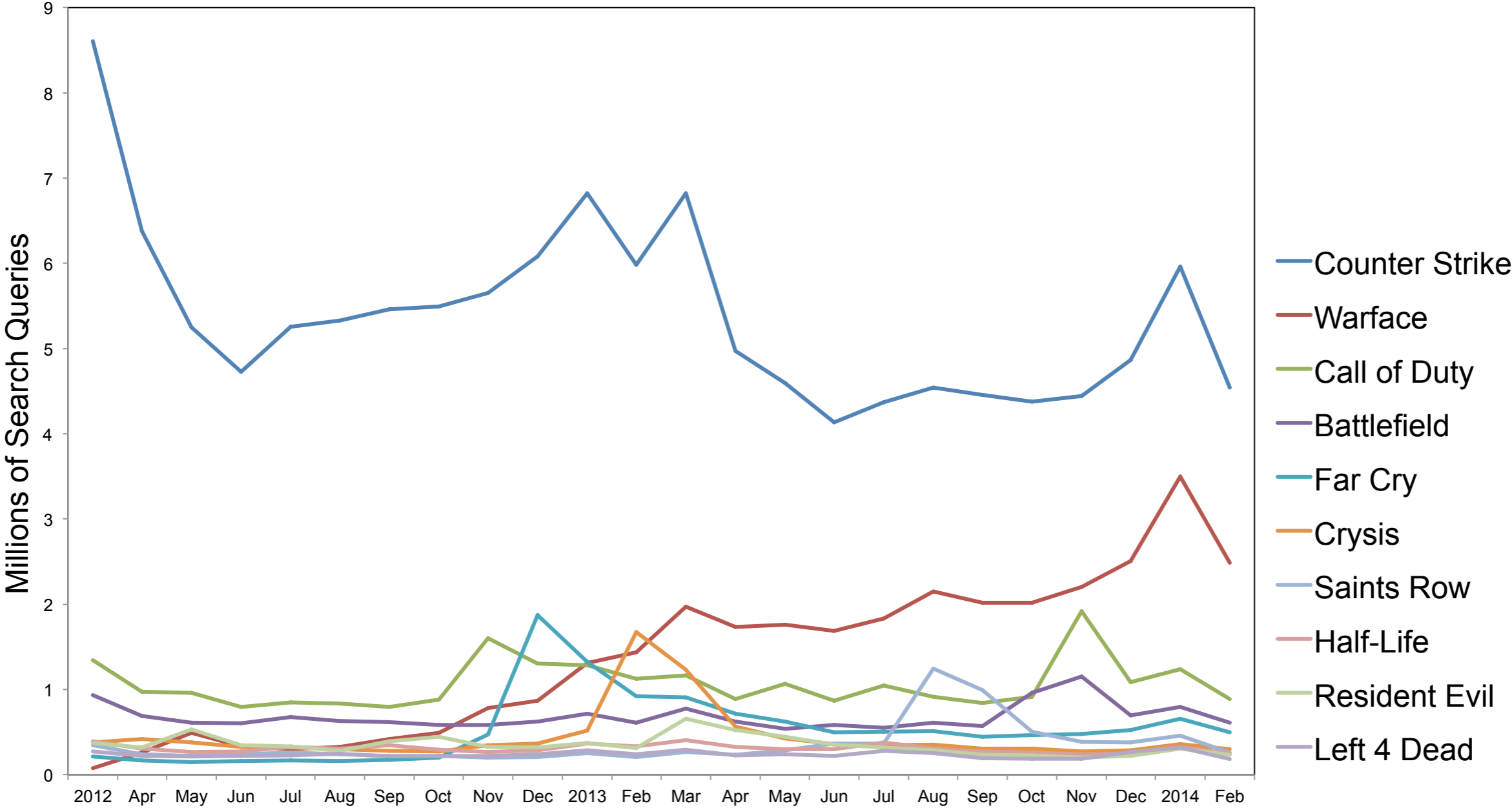
# World of Tanks is also most popular Action game



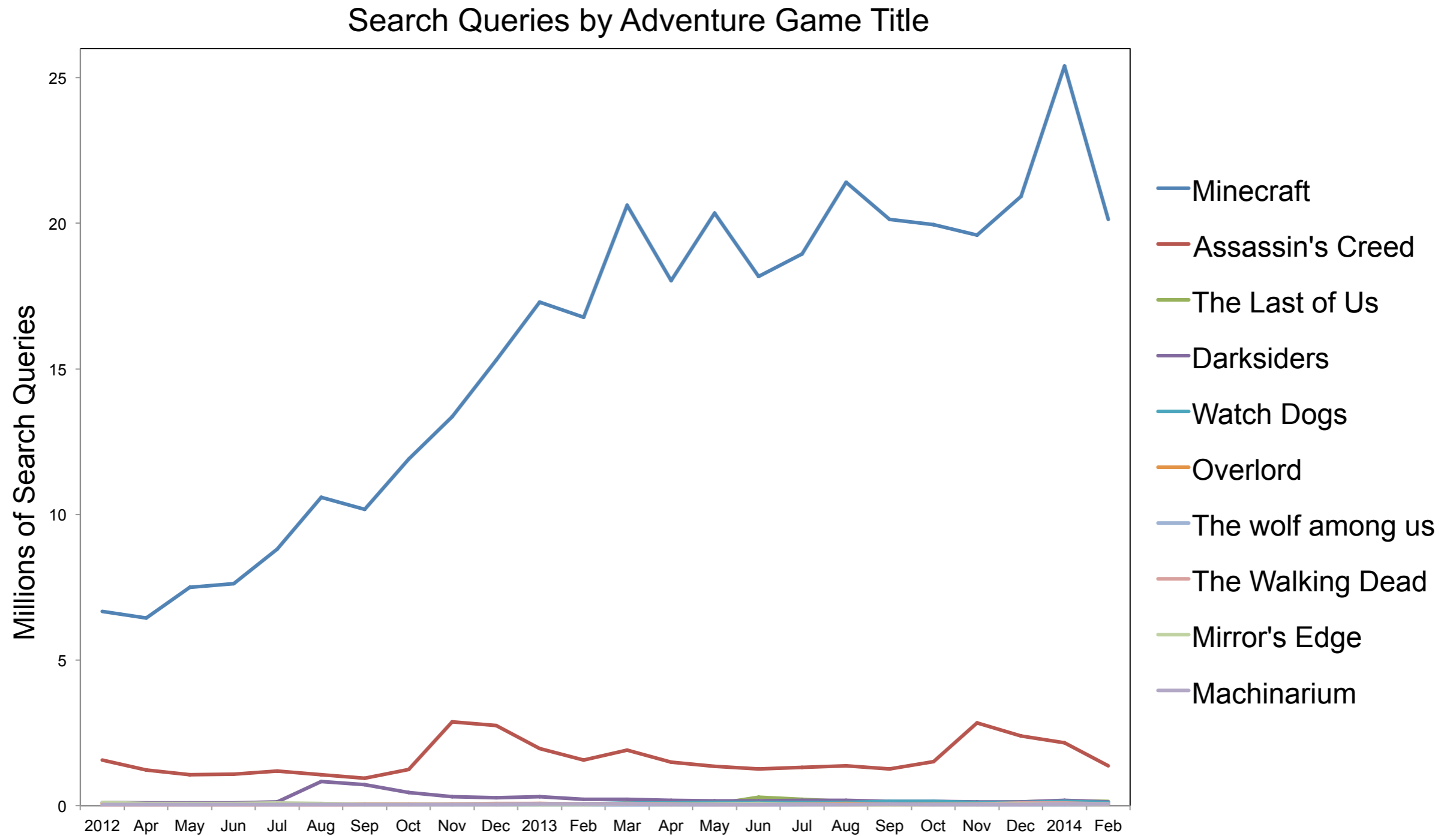


# Shooter Titles: Counter Strike is most popular, but Warface is growing quickly

Search Queries by Shooter Game Title

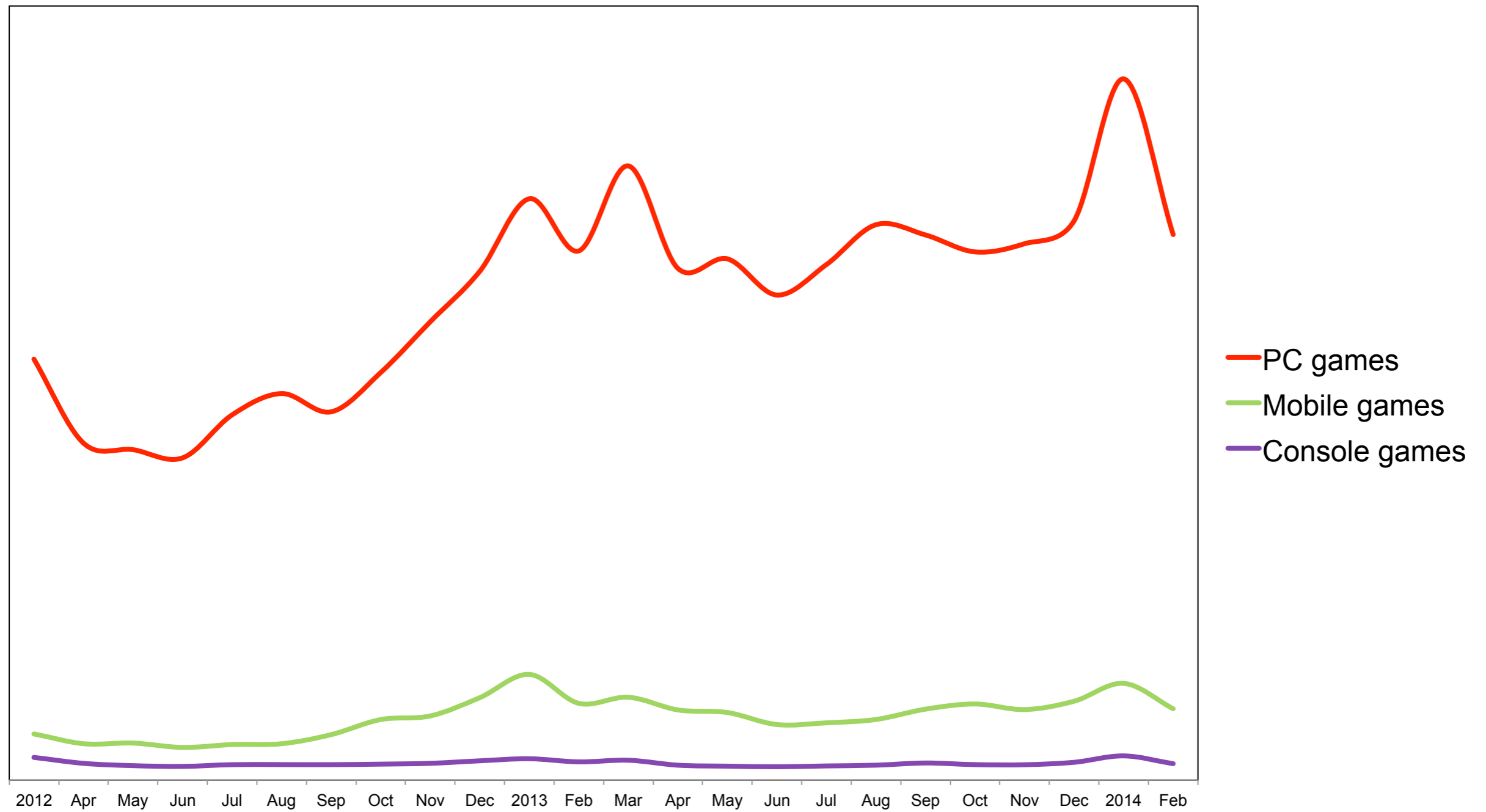


# Minecraft dominates the Adventure category

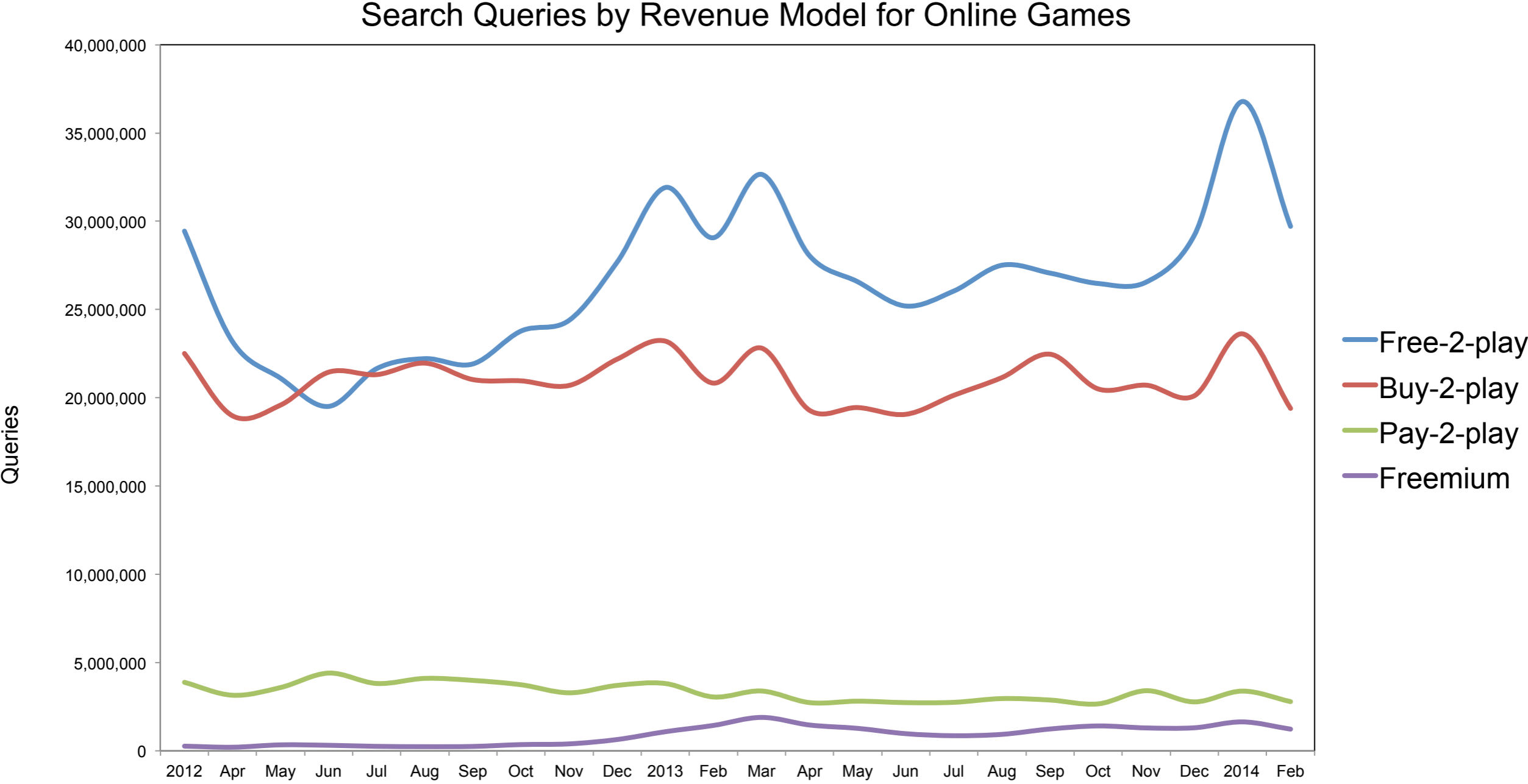


# PC games dominate the online gaming market

Search Queries by Platform for Online Games



# Free-2-Play and Buy-2-Play revenue models dominate



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

Buy-2-play (Minecraft, GTA Online)

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

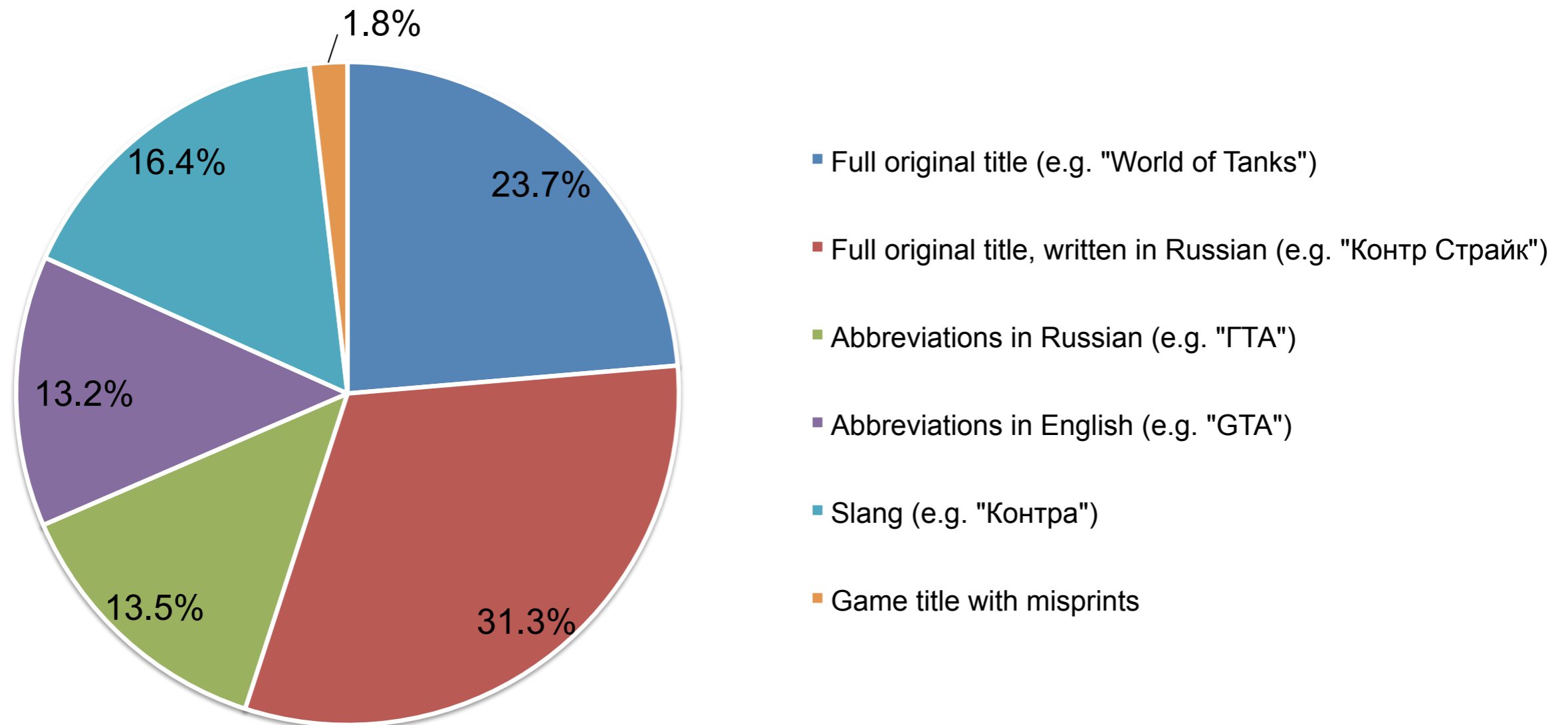
Group «Freemium» mainly consists of games for mobile platforms

Yandex data, March 2014, Geo - Russia

# Search Patterns

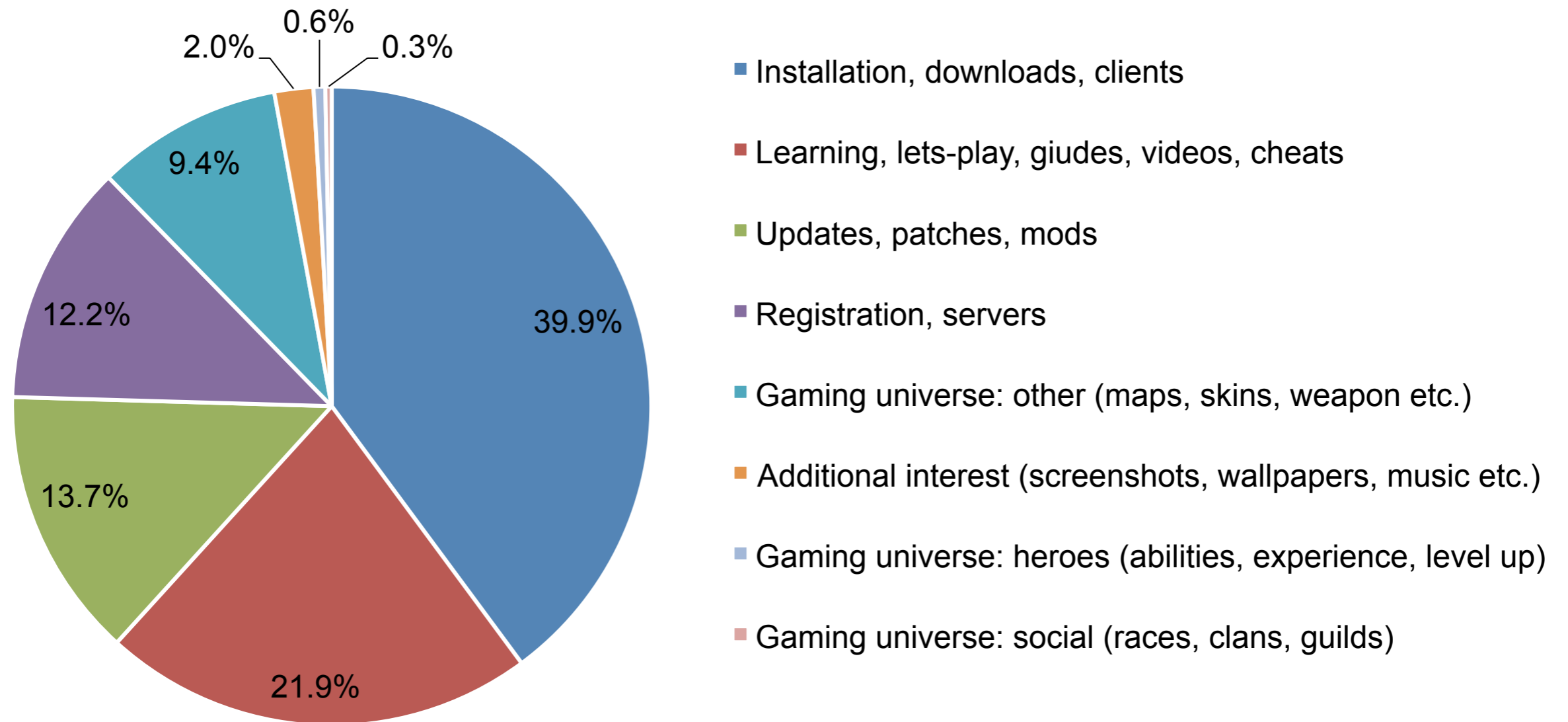
- ✓ Various writings of games' titles
- ✓ Queries for gaming-related terms

# Search Query Behavior of Online Gamers



55% of users' queries for online games are in Russian.  
The other 45% use queries in English.  
Only 55% of queries include the original title of online game.  
45% of queries include slang, abbreviations and short titles.

# Queries made by users searching for gaming-related terms



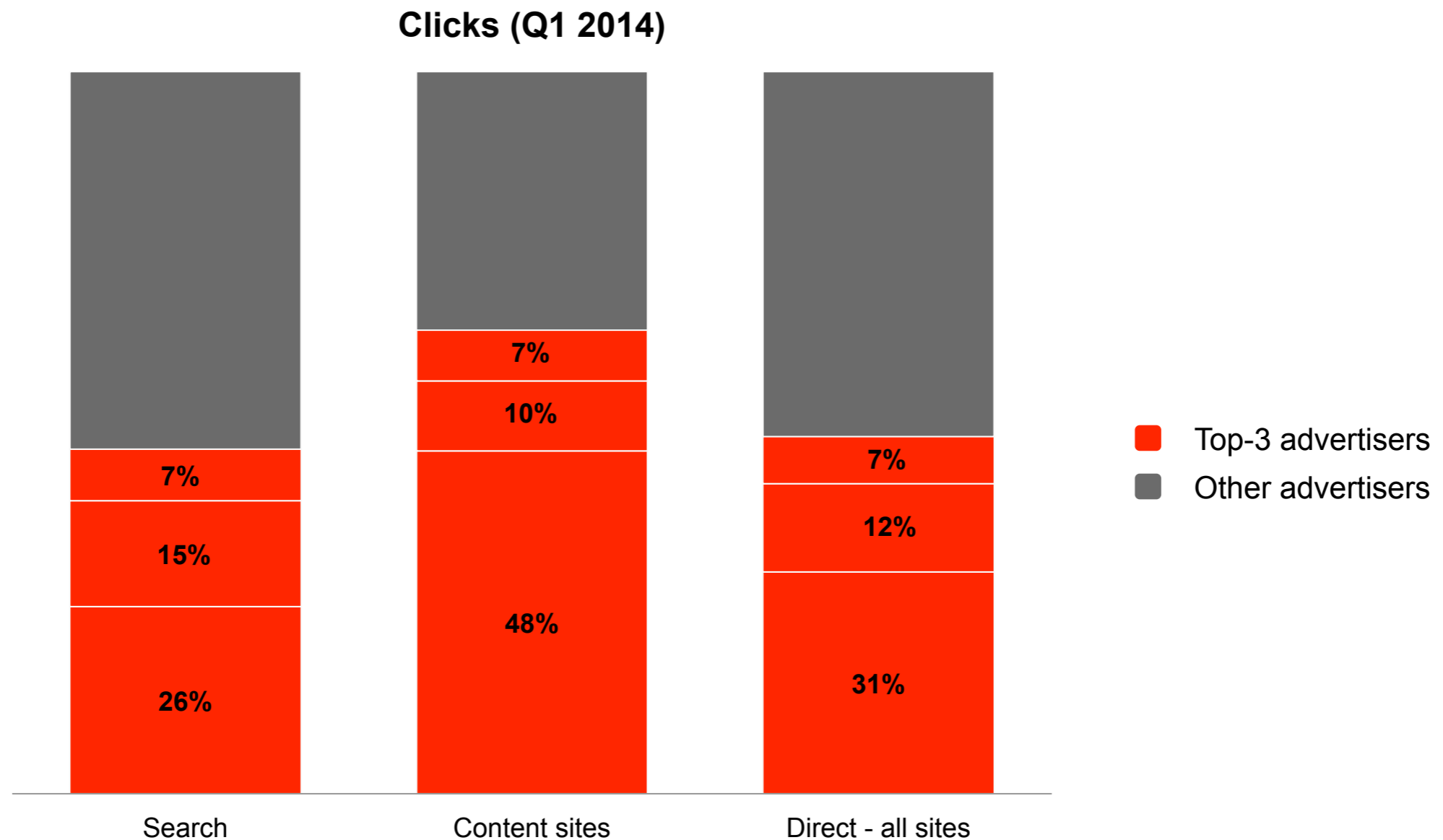
53% of queries represent various writings of game titles. 47% are inlaid queries, including exact user intent.

# Competitive landscape

- ✓ Category Leaders' Click Share
- ✓ Click Share – Search vs. Content Sites
- ✓ Click Share by Regions
- ✓ Average CPC (dynamics)
- ✓ Average CPC (by position)

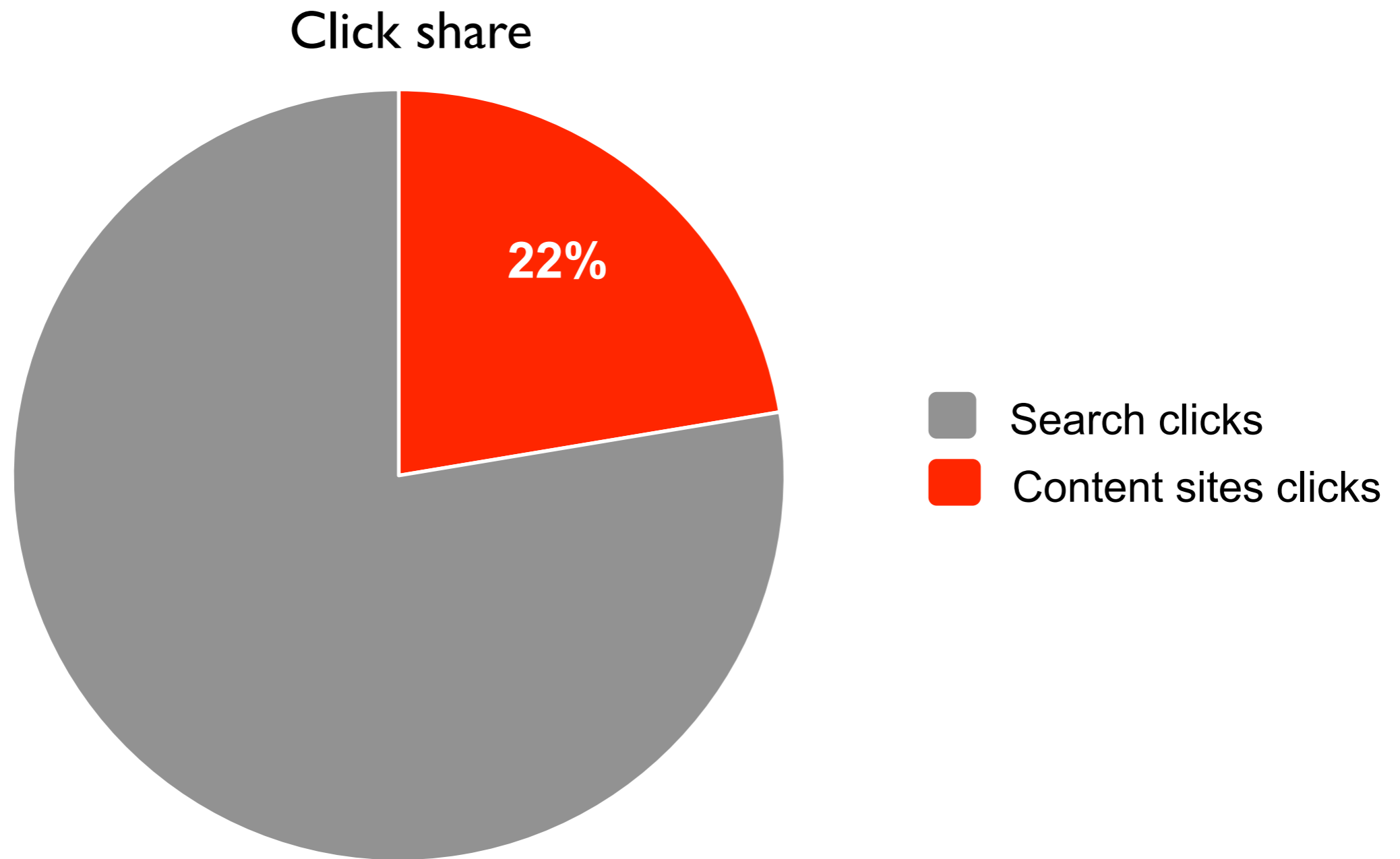


# Paid Click share performance for Gaming Advertisers



In Q1 2014 – 49% of total click volume in category was drawn by TOP-3 advertisers.

# Paid Click Share – Search vs. Content Sites

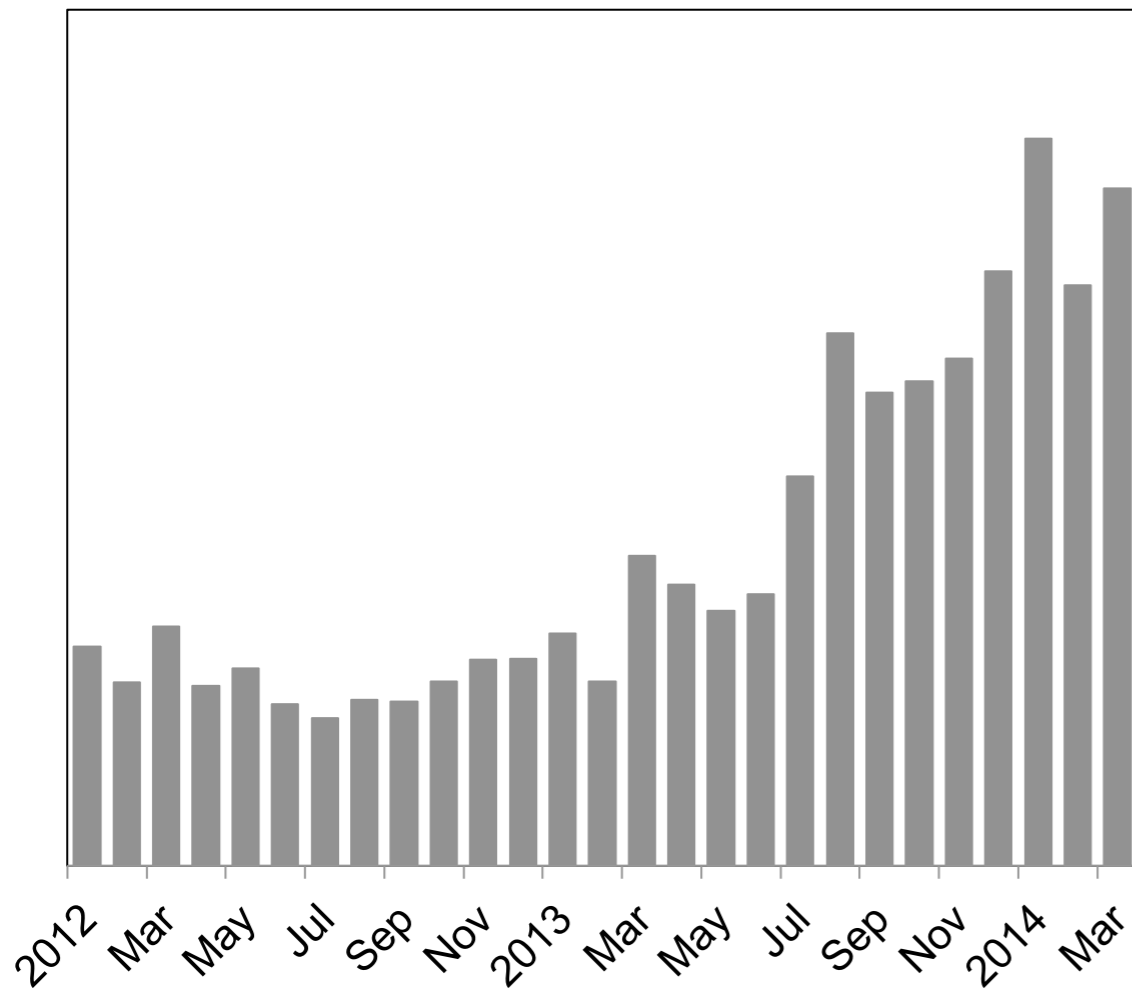


In Q1'2014 clicks from content sites made 22% of total click volume.

# Paid Click Share – Search vs. Content Sites

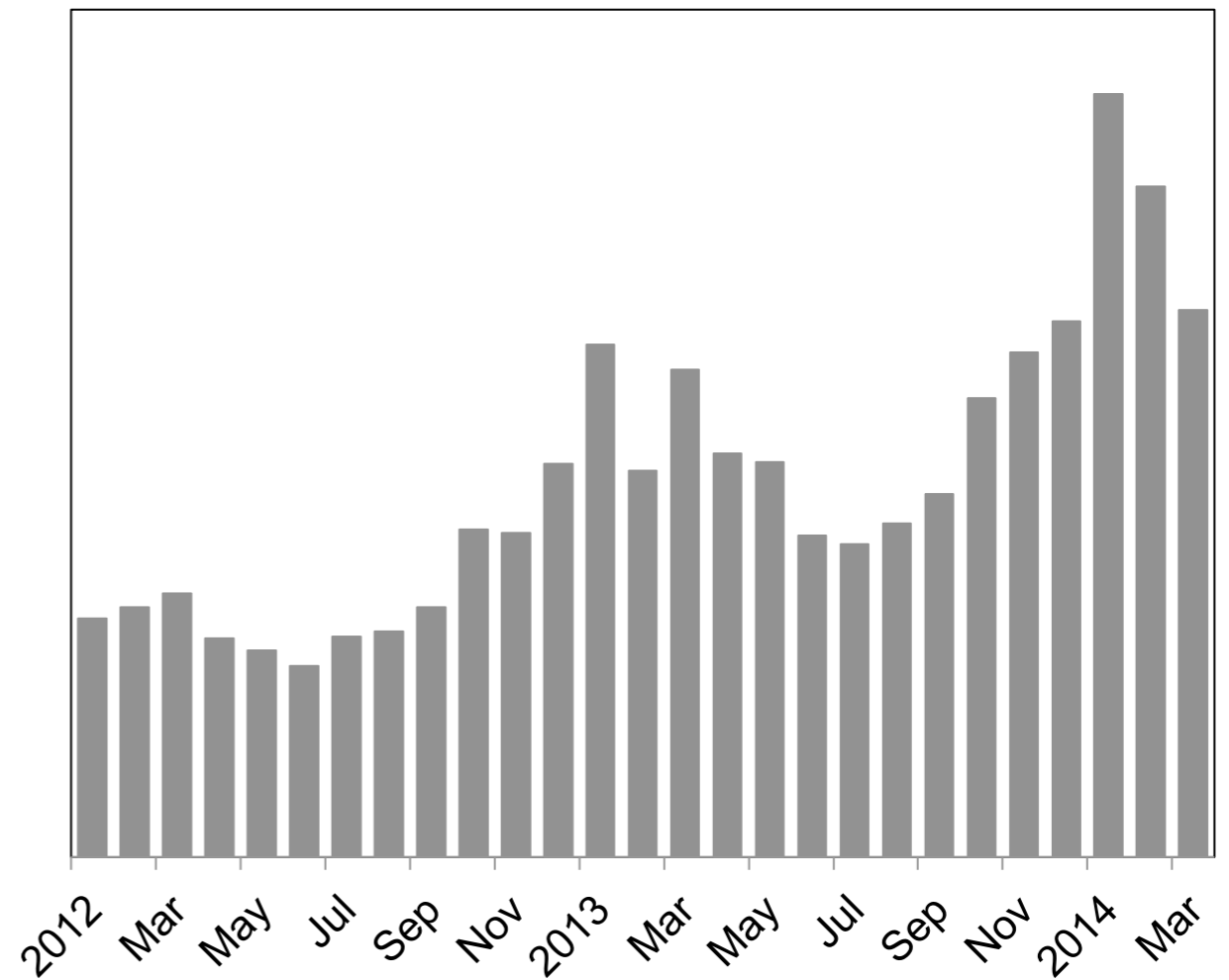
## Search

■ Online games

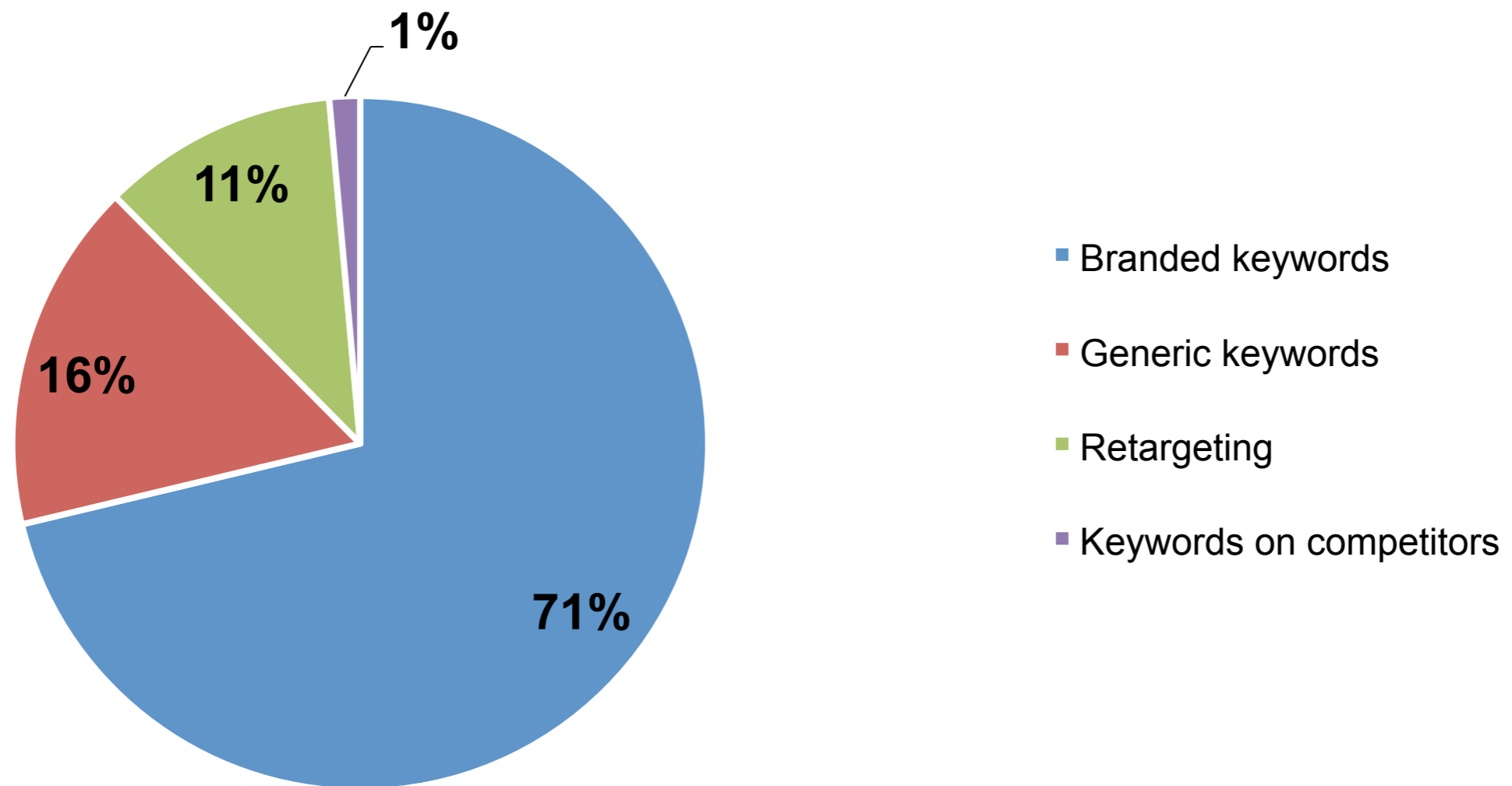


## Content Sites

■ Online games



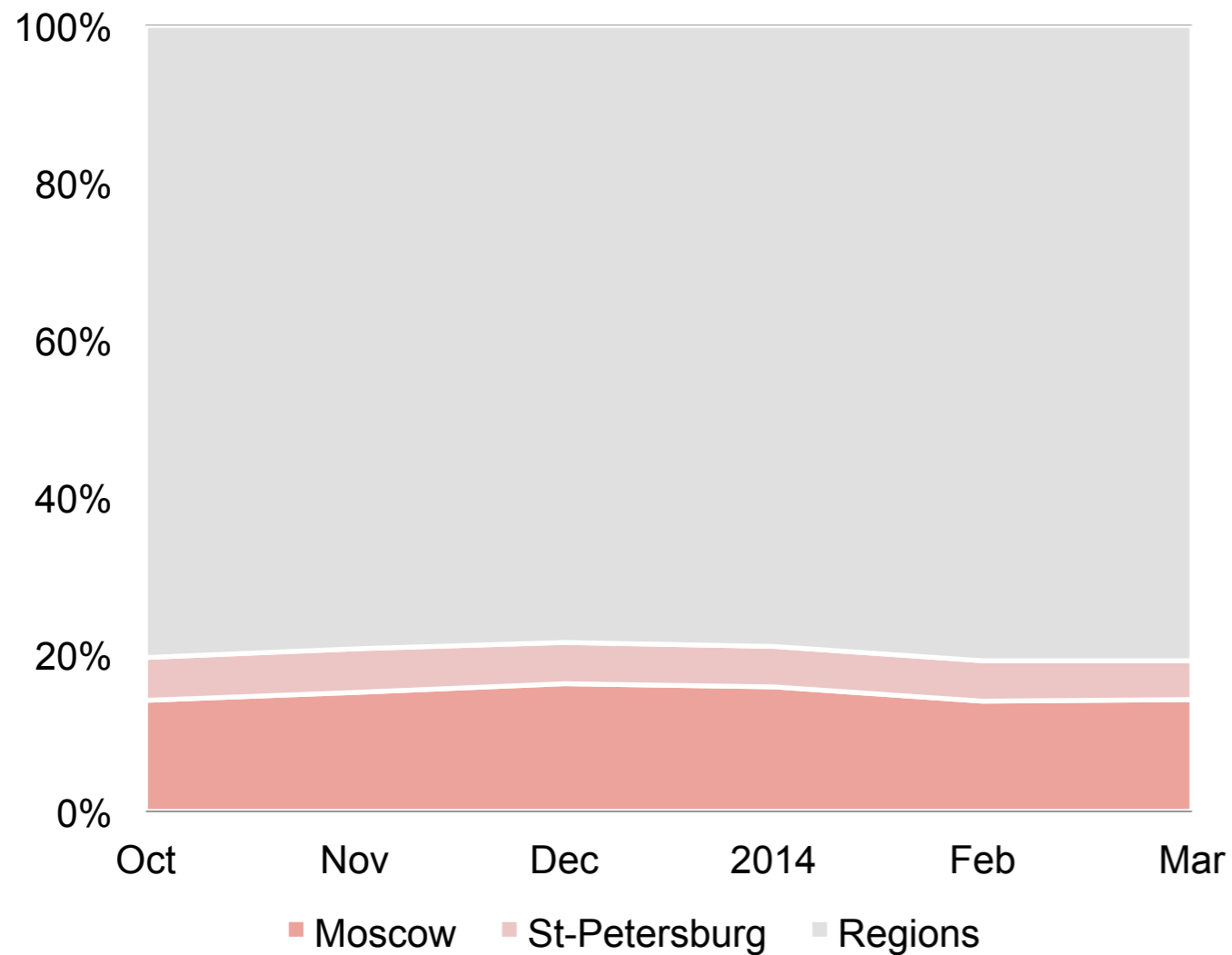
# Paid clicks by Keyword strategy



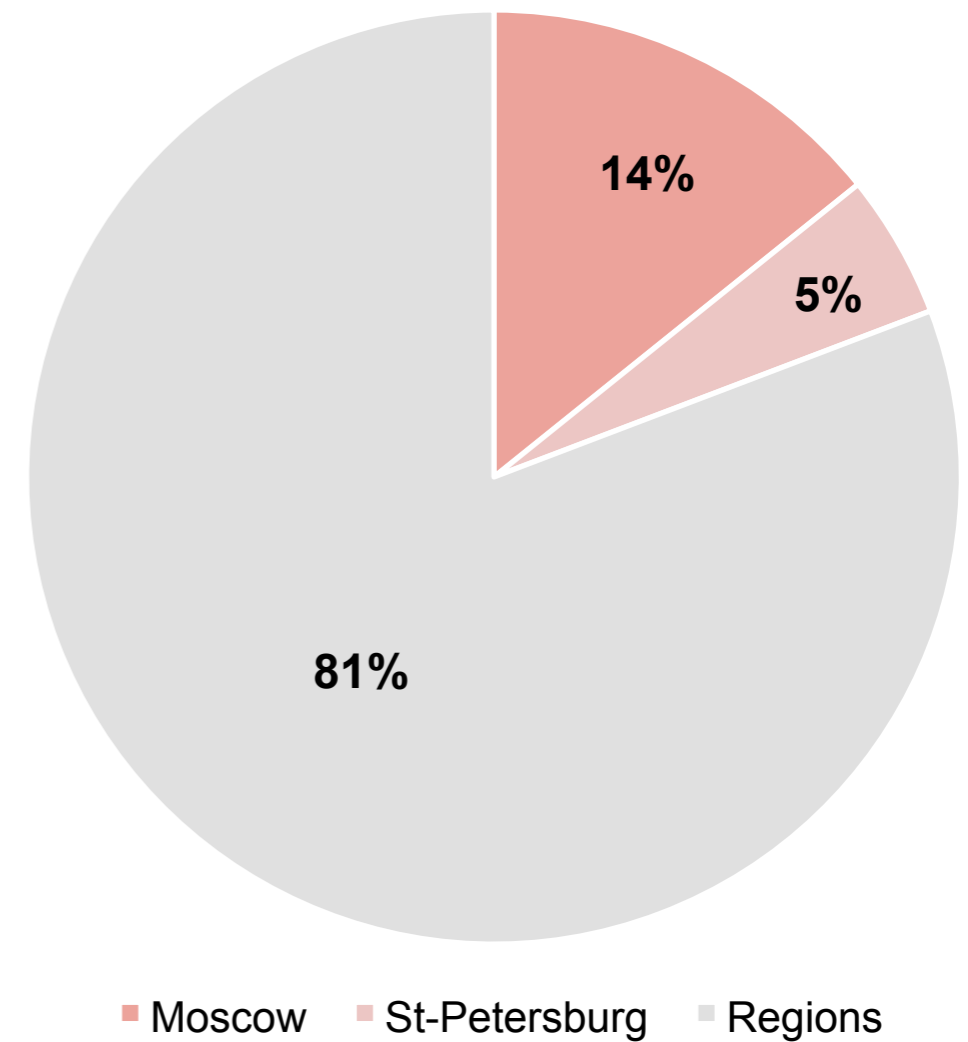
Brand awareness plays an important role in the success of CPC campaign in category. Brand keywords clicks share reaches 70% of all clicks for TOP advertisers.

# Paid click share by location

## Online games



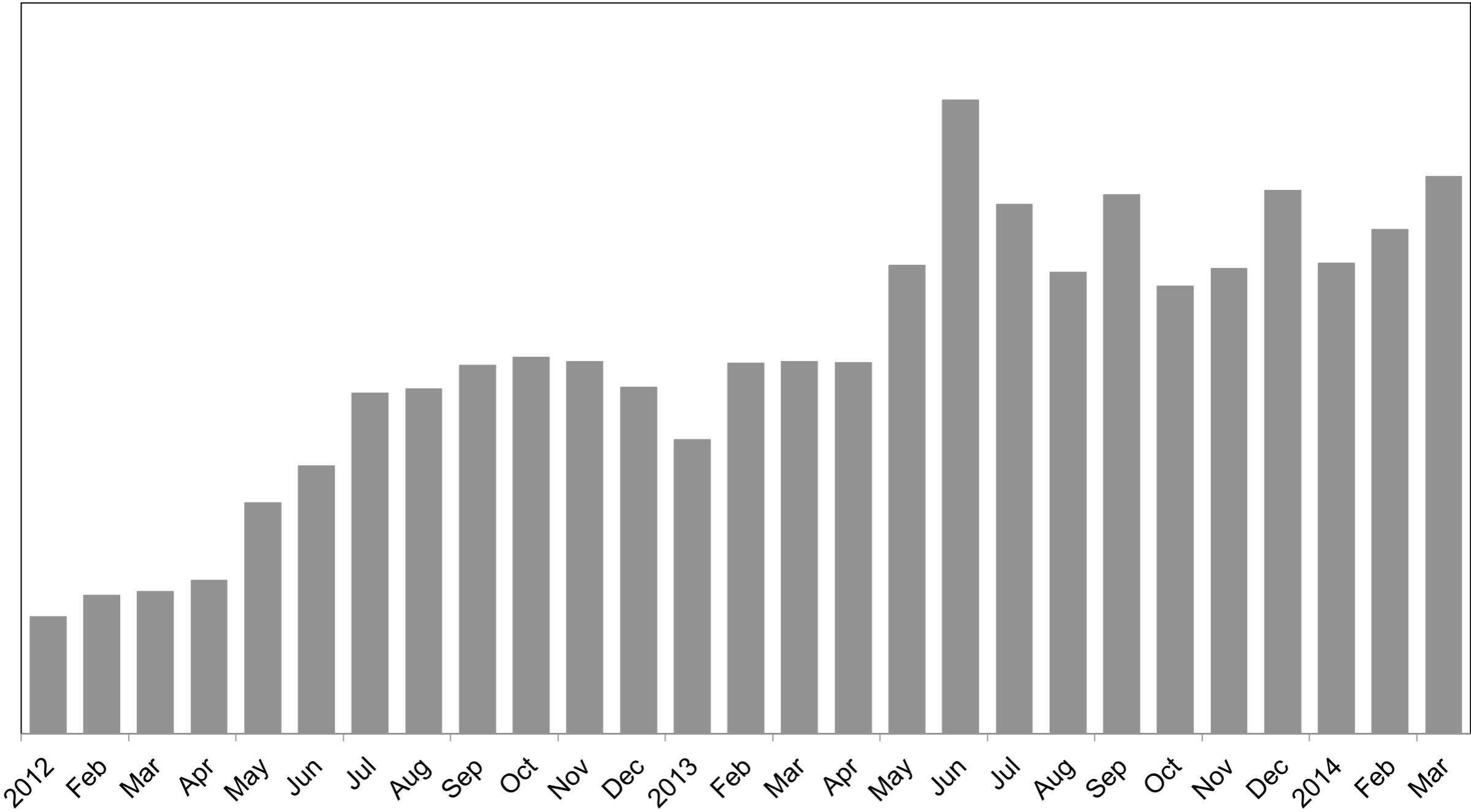
## Click share (March 2014)



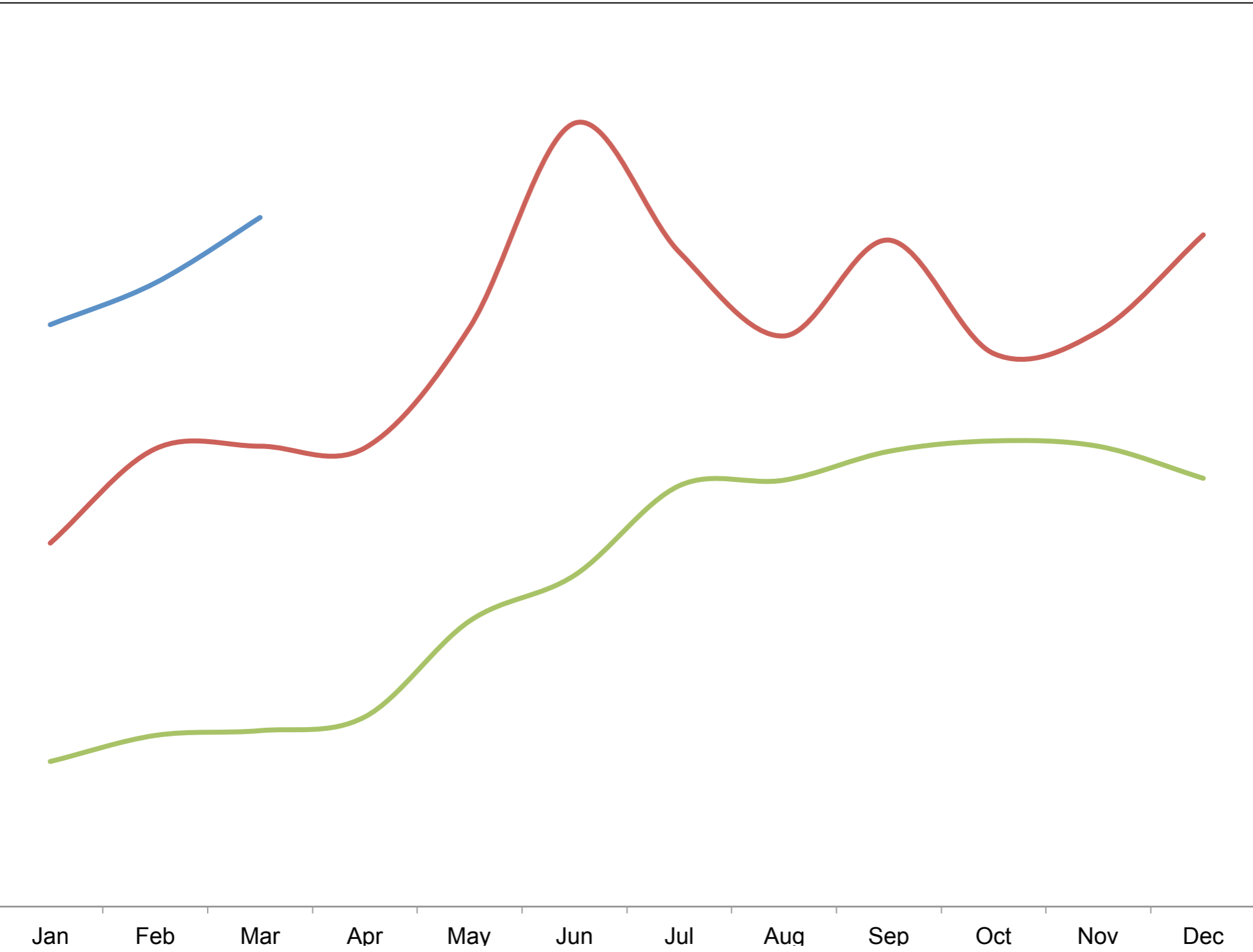
# Average CPC for Online Game Category

CPC

■ Online games



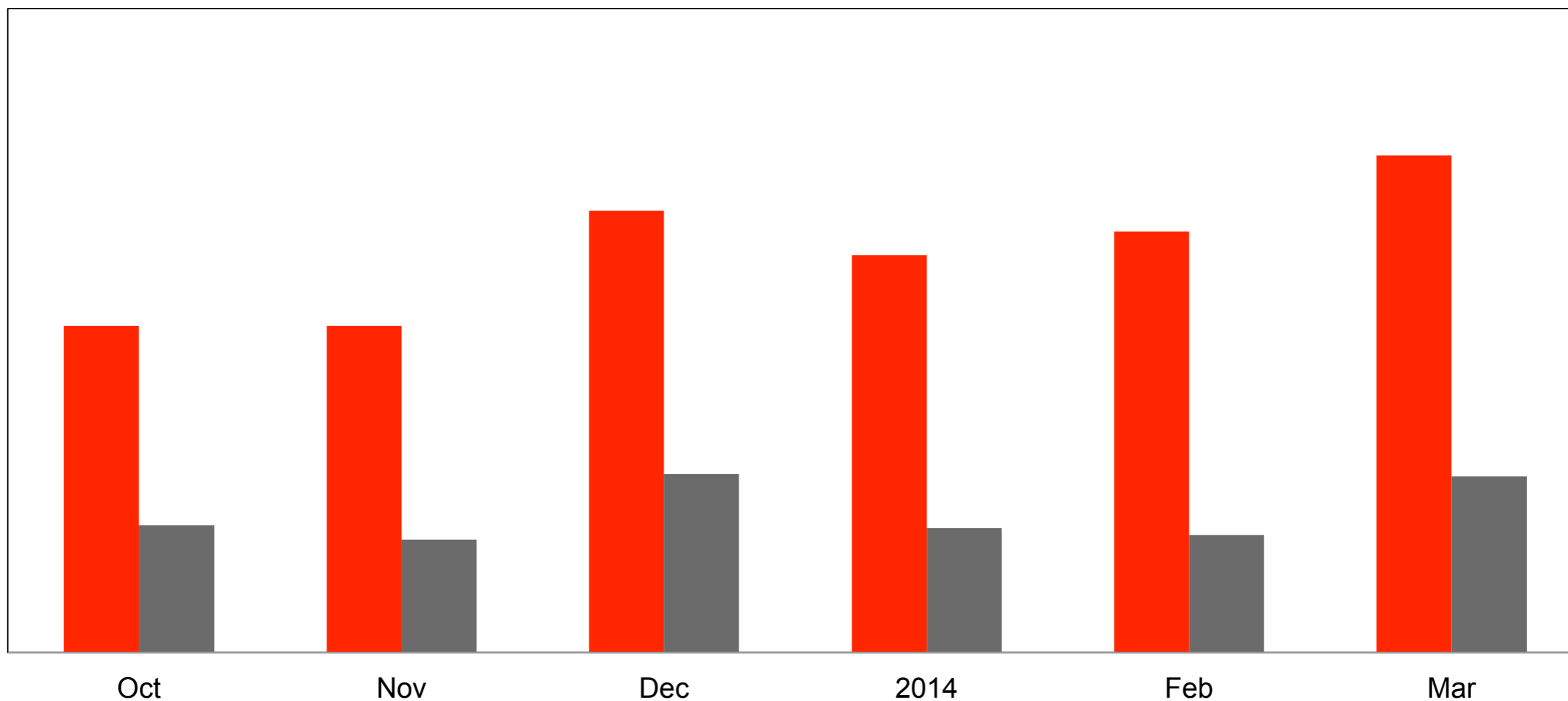
# Average CPC Trends



— 2014  
— 2013  
— 2012

# Average CPC (by position)

■ Online games (premium)    ■ Online games (guaranteed/dynamic)







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# Thank you!