

YANDEX

YOUR GATEWAY TO RUSSIA

Manfred Schlosser

Head of Sales and Partnerships – Europe at Yandex

Yandex

Internet and audience in Russia



Internet audience in Russia



97 million

users or 79% of the population of Russia



71%

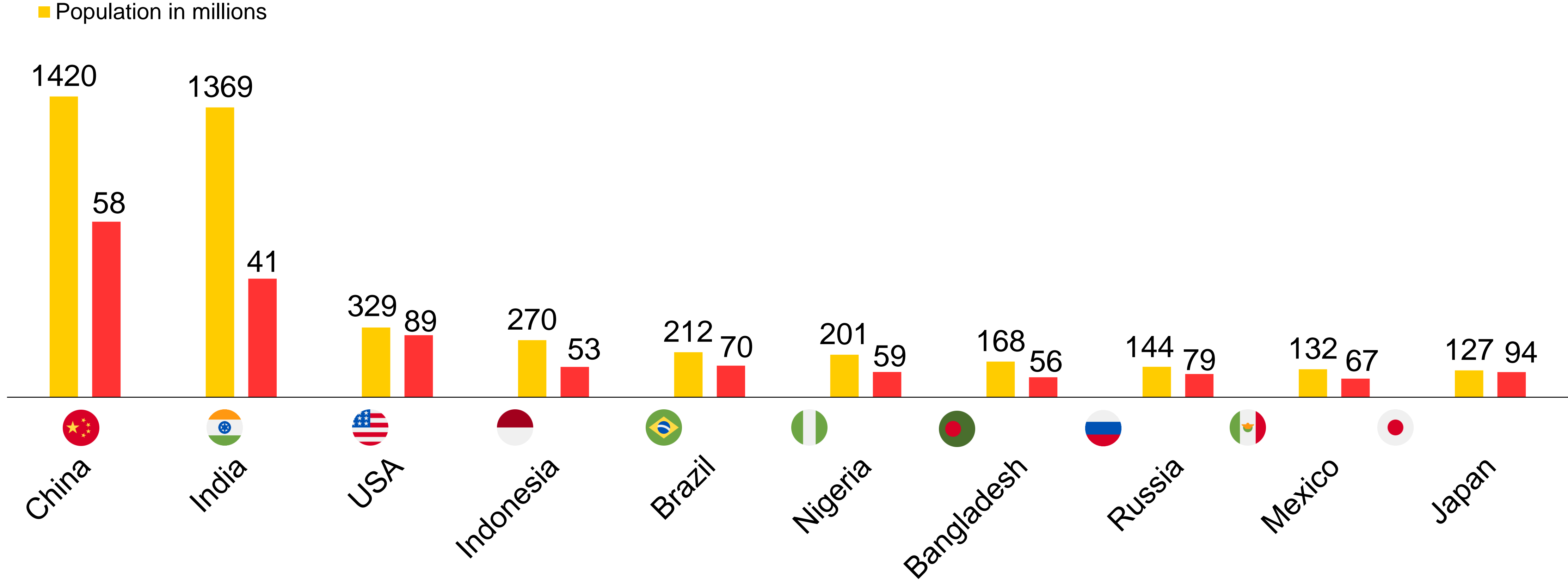
of users access the internet on mobile devices



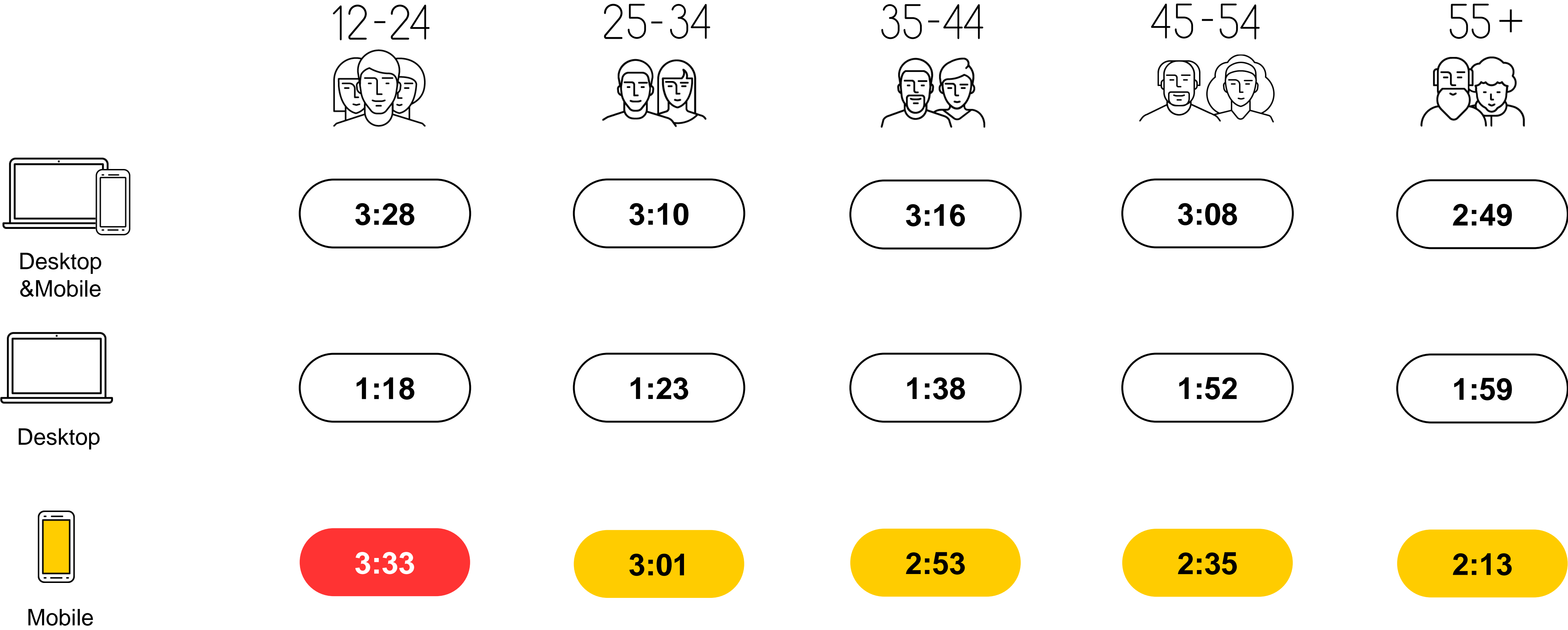
190 minutes

average time users spend online each day

Top 10 countries by number of internet users: Russia is 8th largest Internet audience



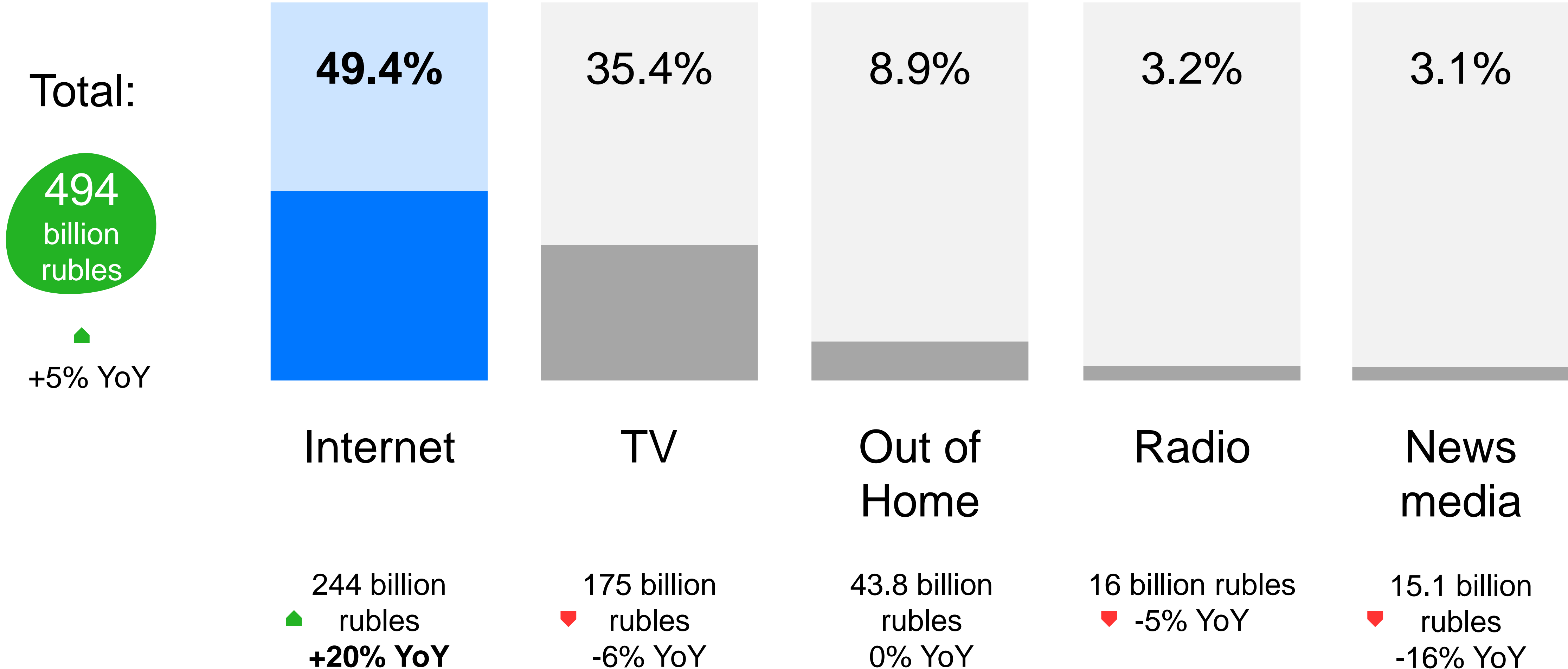
Time spent on the internet



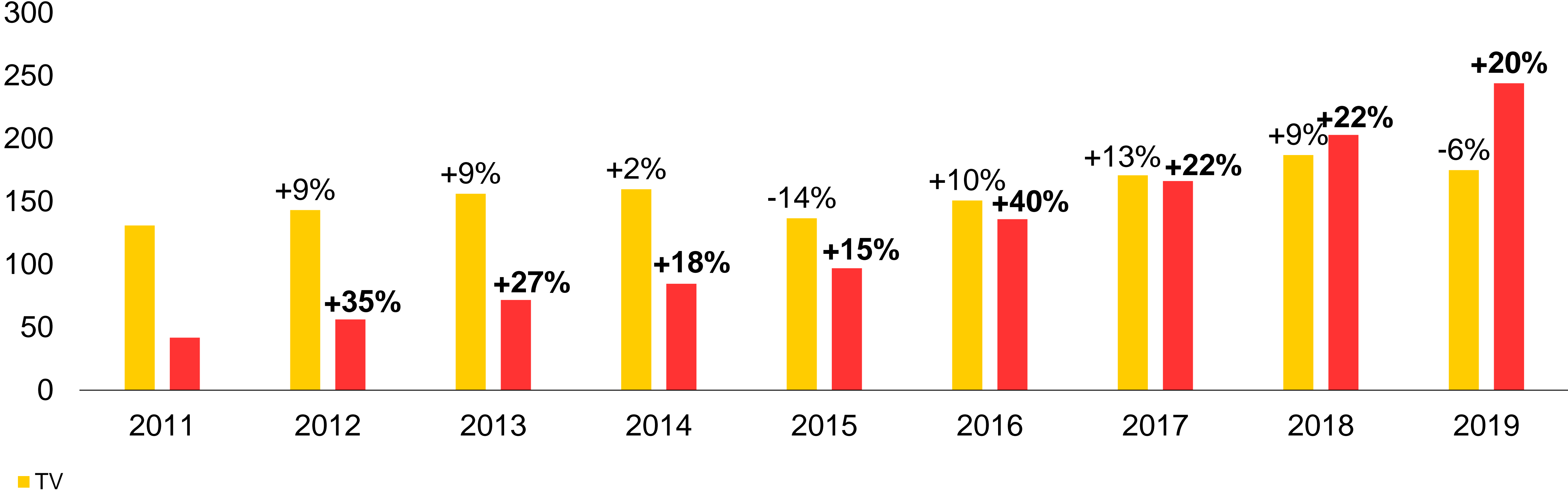
Online advertising market



Volume of the Russian advertising market in 2019

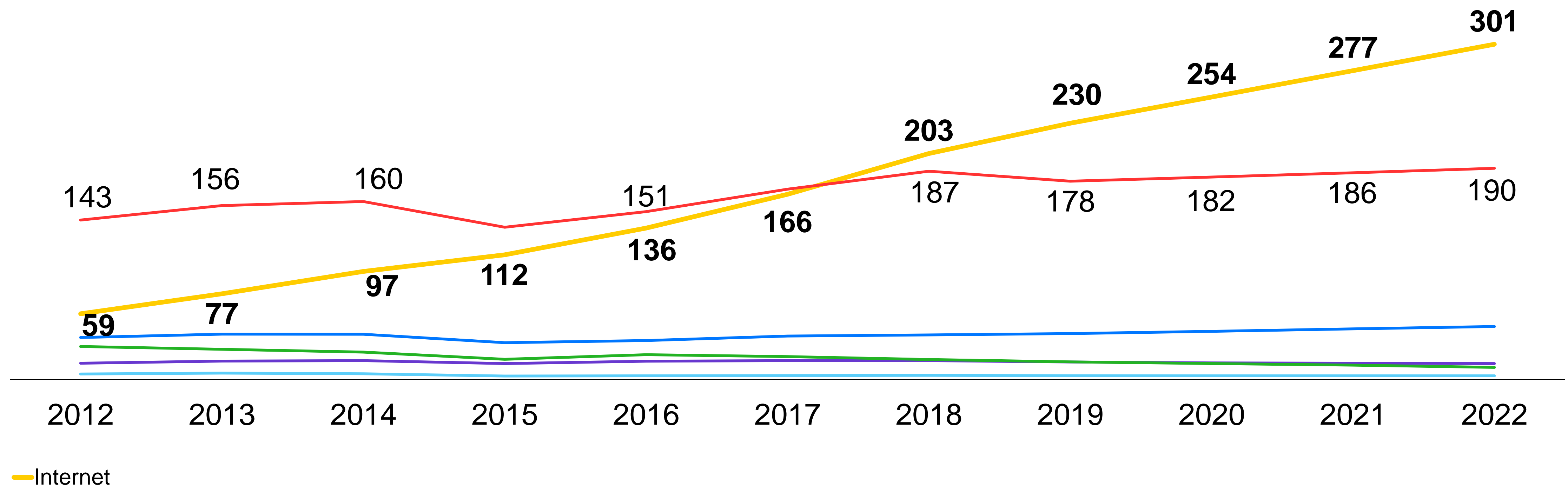


Investment in online advertising continues to grow at a fast rate



ACAR, 2011-2019, billion rubles, year-on-year growth.

Investments in online advertising will continue to grow

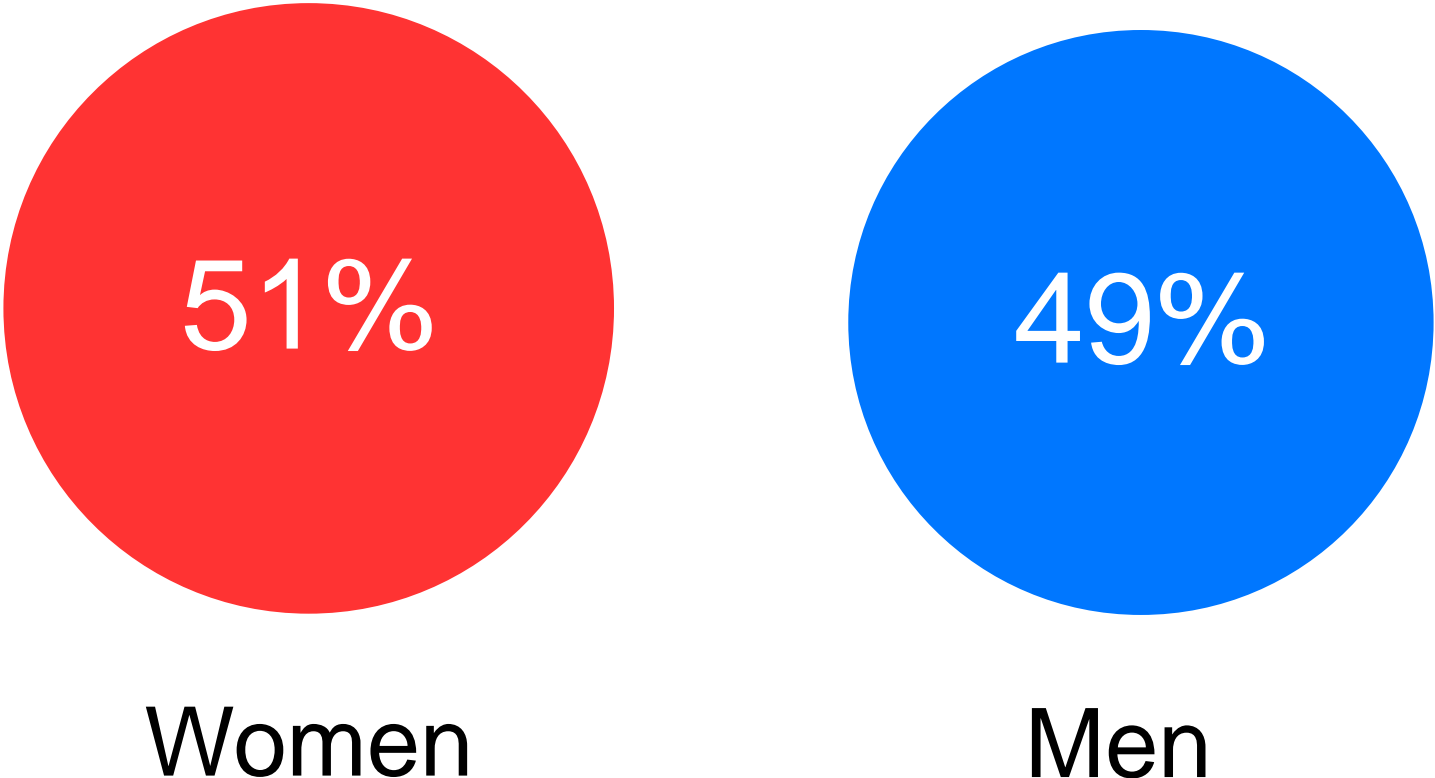


E-commerce market

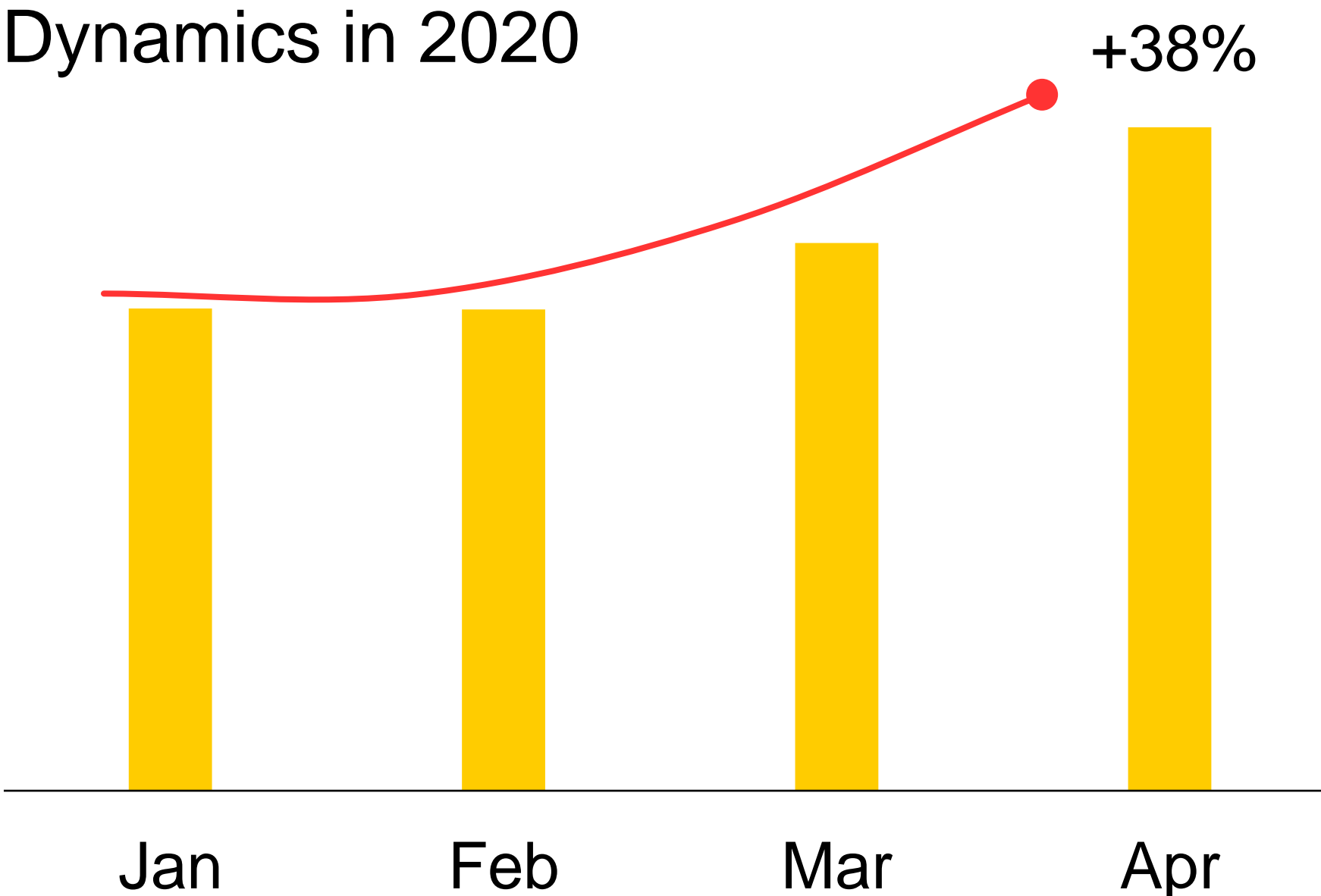


E-commerce users in Russia

~64,000,000

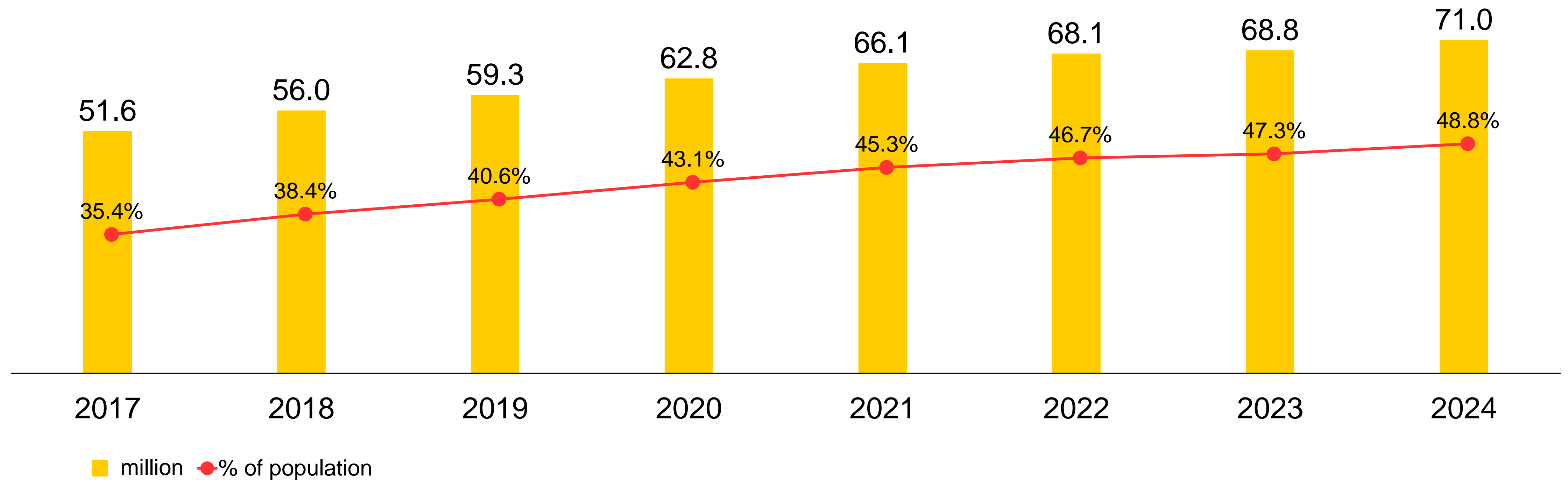


Age	Percentage
0–17	8%
18–24	17%
25–34	23%
35–44	23%
45–54	13%
55+	16%



Yandex.Market Analytics, April 2020. Growth in April relative to January 2020.

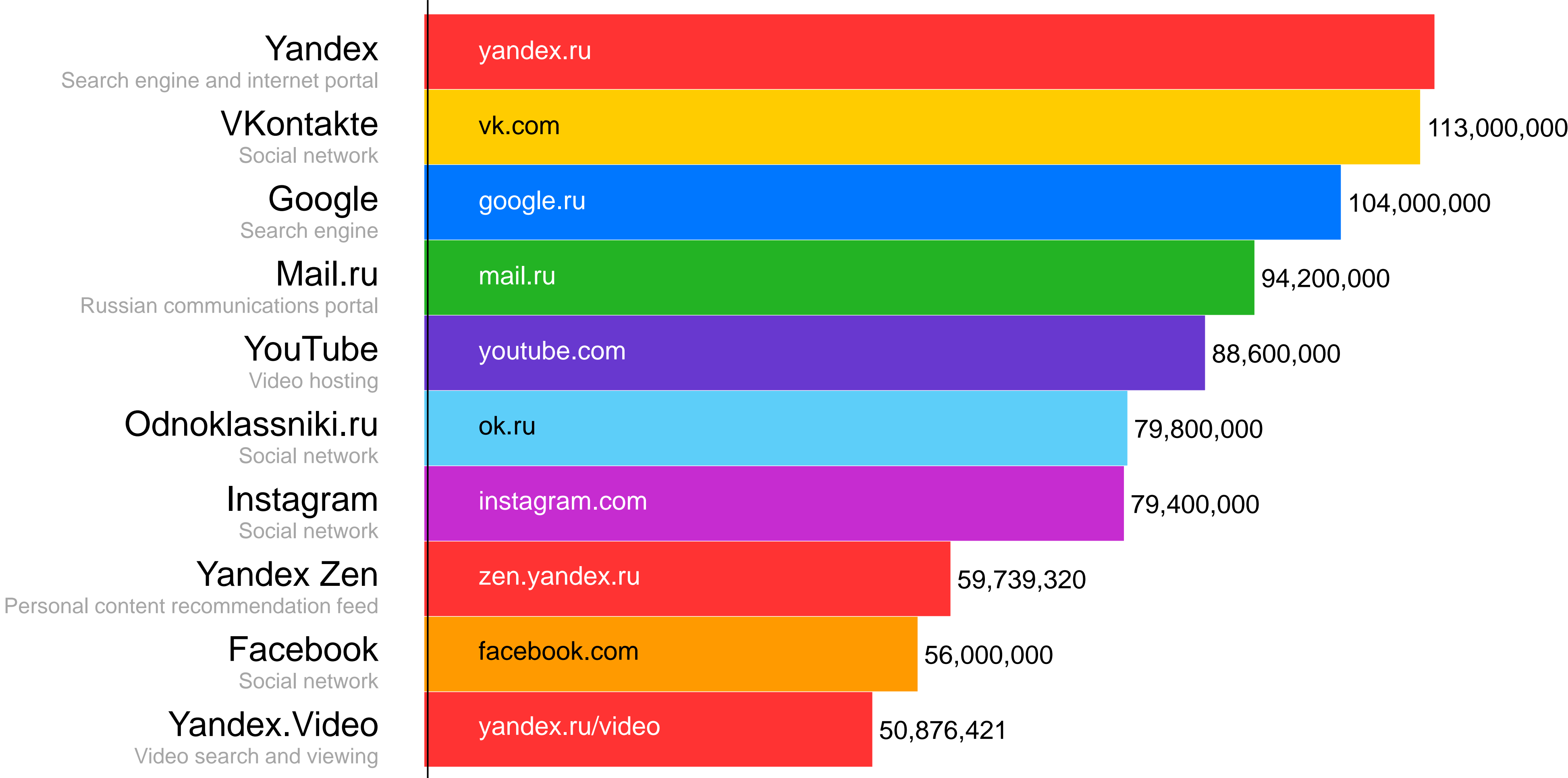
E-commerce users in Russia



Statista. May 2020. Forecast adjusted to account for the expected impact of COVID-19.

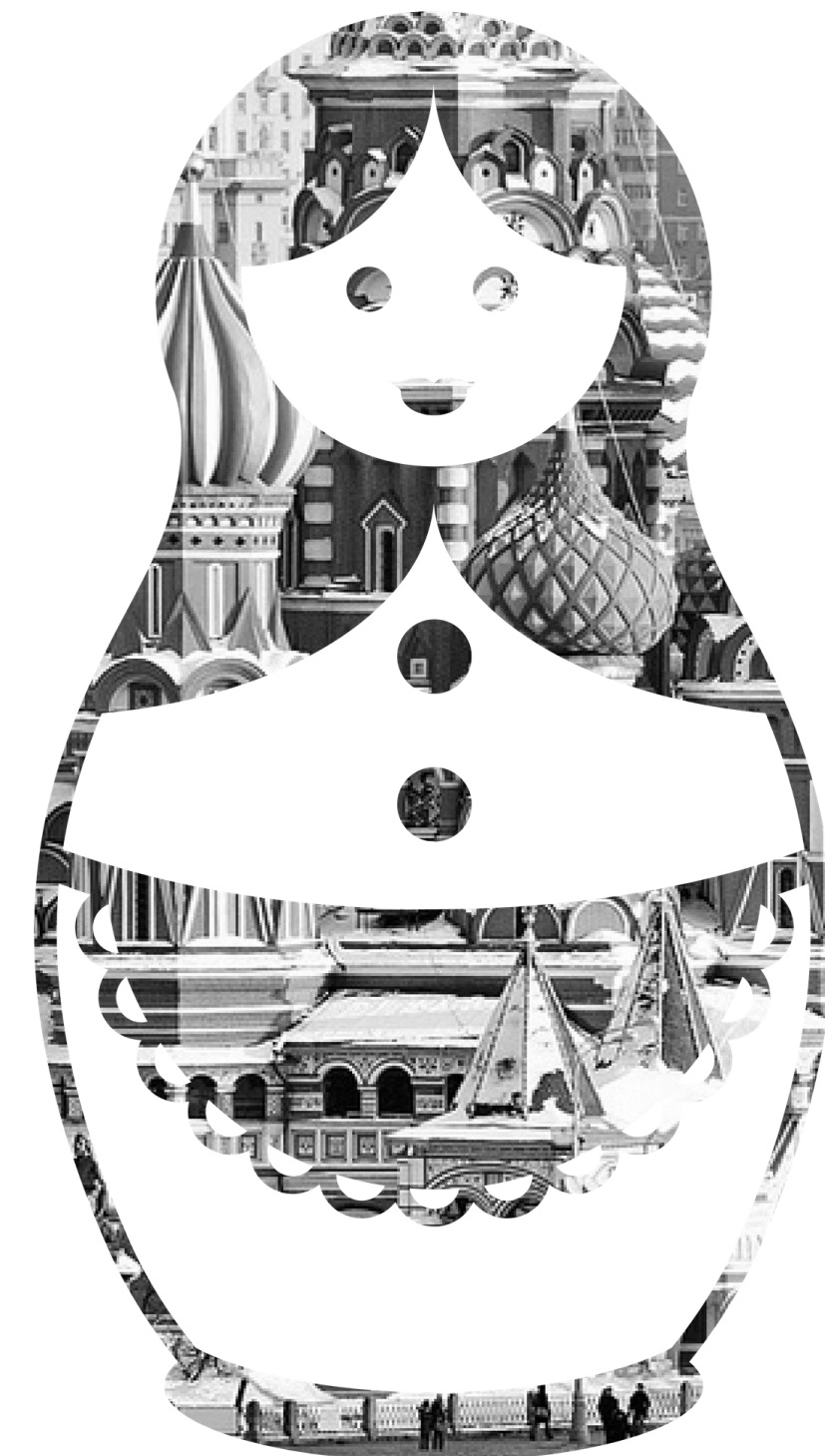
www.yandex.com | Your Gateway to Russia | August 2020

Top internet resources in Russia



Yandex.Radar data. Top internet resources in Russia. Cross-device users. March 2020.

INTRODUCTION TO **YANDEX**





Yandex is a technology company that builds intelligent products and services powered by machine learning. Our goal is to help consumers and businesses navigate the online and offline world more easily

OUR MILESTONES

1989



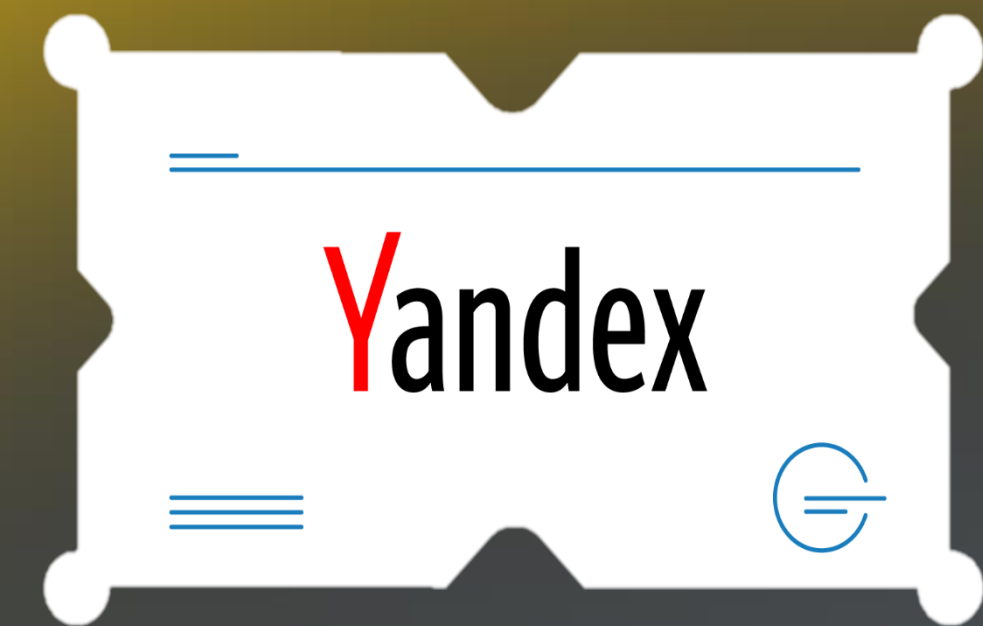
Search Technology

1997



yandex.ru

2011



IPO on NASDAQ

Over

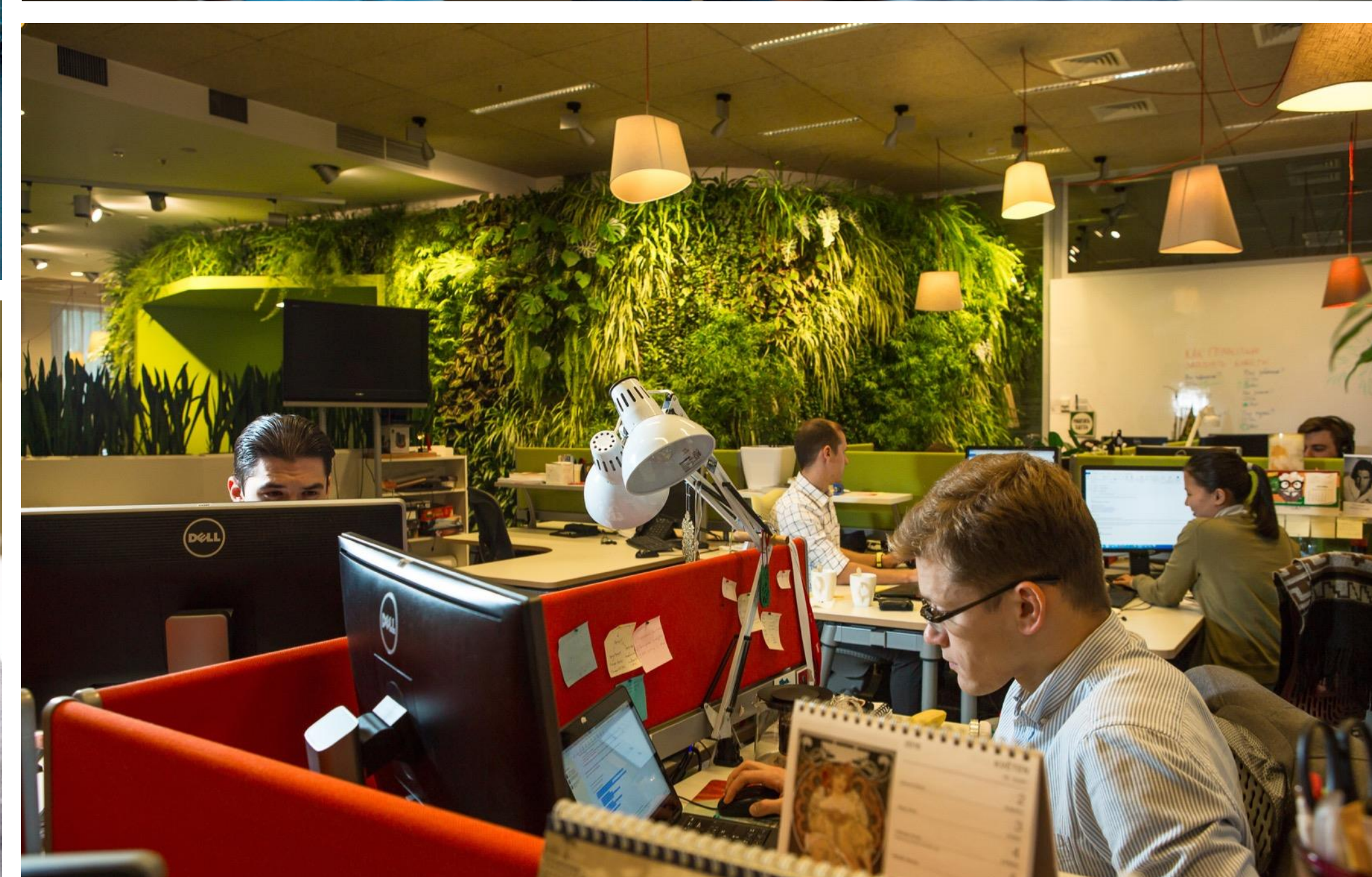
11 000

employees

About **50%**

software developers





World's most recognizable search technologies



Yandex

Russia, 1997



Google

US, 1998



NAVER

S.Korea, 1999



Baidu 百度

China, 2001



bing

US, 2009

Yandex's presence outside Russia

Belarus
30.8%
Share of search market

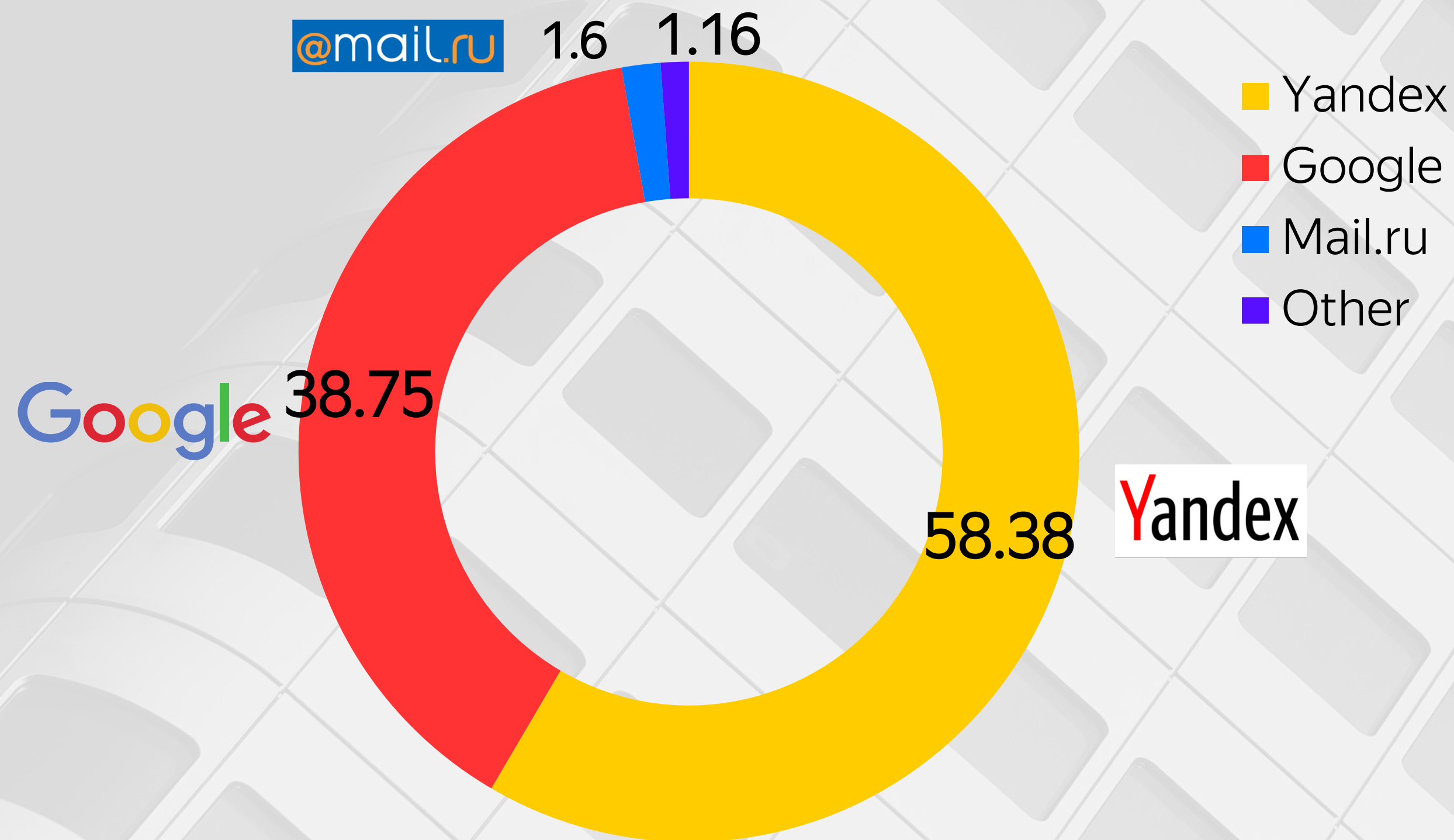
Turkey
3.2%
Share of search market

Kazakhstan
18.5%
Share of search market

Source: Yandex.Radar, August 2019

YANDEX IS THE CONSISTENT SEARCH LEADER IN RUSSIA

Search market share %, Russia, all devices



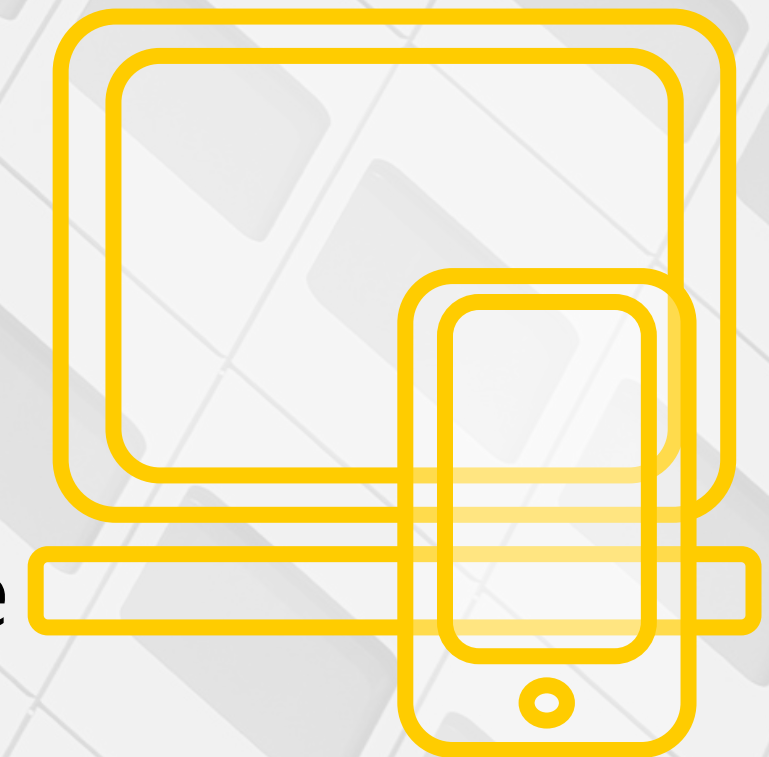
Yandex Search share by device:

67,79%

on desktop

55,88%

on Smartphone



Yandex search in Europe (queries/month)

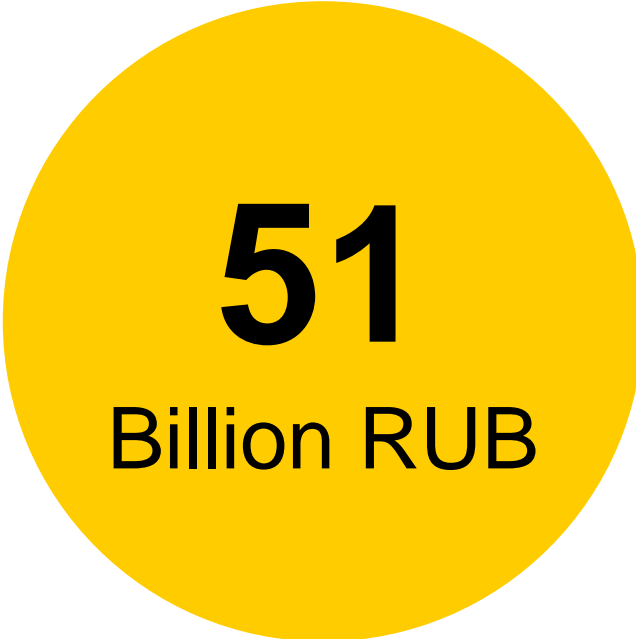
Top-10 European countries Millions of queries/month

Germany	15,37
The Czech Republic	10,37
Turkey	8,35
The Netherlands	7,36
France	5,19
The UK	5,11
Latvia	4,48
Poland	4,17
Spain	3,69
Estonia	3,29

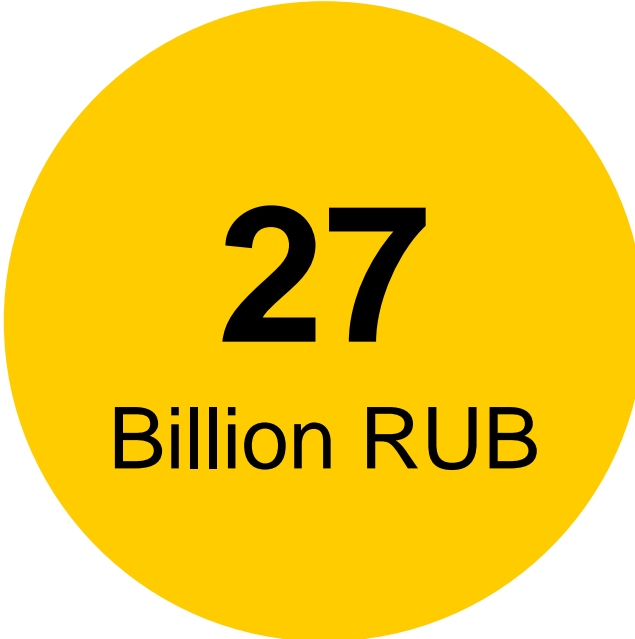
A map of Europe and Russia is shown in a dark blue color. A callout box with a white dot and a line points to Russia, containing the text "8,6 billions Russia".

8,6 billions
Russia

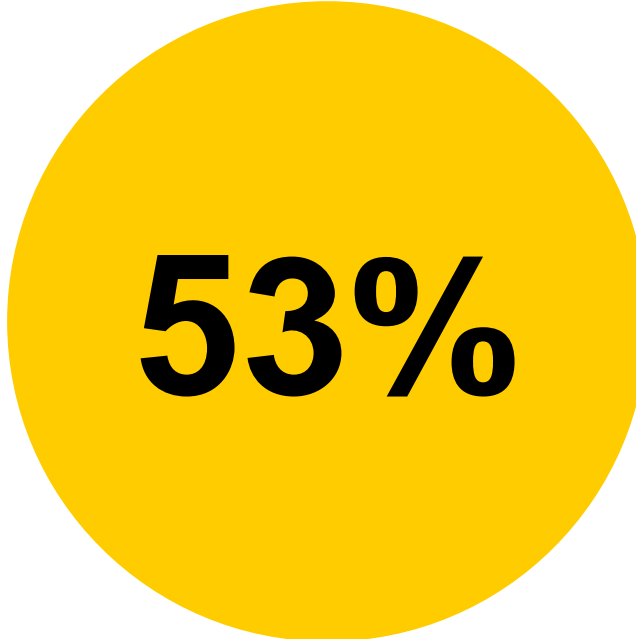
Yandex: #1 advertising partner in Russia



Size of Russian online advertising market in Q1 2019*



Yandex advertising revenue in Q1 2019**



Yandex's share on online advertising market

* Source: RACA, 2019

** Yandex official financial reporting for Q1 2019



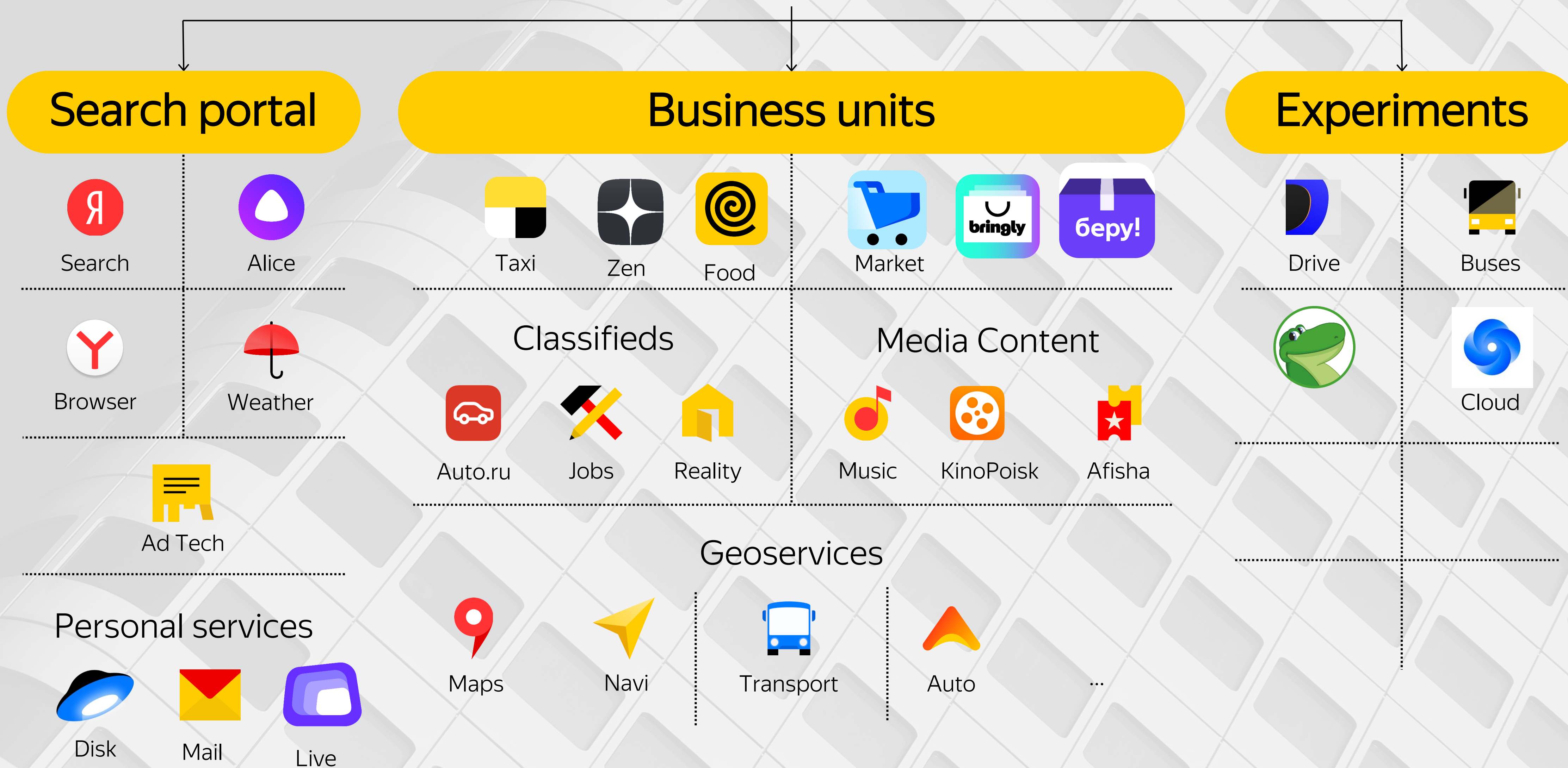
Products and services

YANDEX IS FAR MORE THAN A SEARCH ENGINE

The screenshot shows the Yandex.ru homepage with several service widgets highlighted by yellow callouts:

- News**: A section titled "Сейчас в СМИ в Москве" (Now in the media in Moscow) dated 16 March, Saturday 14:30. It lists news items such as "Юлии Началовой сделали операцию" (Julia Началова underwent surgery) and "Россия пригрозила ответить на новые санкции Евросоюза" (Russia threatened to respond to new EU sanctions). It also includes financial data: USD MOEX 64,81 -0,70, EUR MOEX 73,39 -0,69, and НЕФТЬ 67,04 -0,19%.
- Mail**: A user profile section for "user" with options for "Почта 2" (Mail 2), "Написать письмо" (Write email), "Диск" (Disk), and "Получить Плюс" (Get Plus).
- Search**: The central search bar with the Yandex logo, a search input field, and a "Найти" (Find) button. Below it, a suggestion "Найдётся всё. Например, периметр квадрата" (Everything will be found. For example, the perimeter of a square) and a link to "Сделать Яндекс основным поиском" (Make Yandex the main search engine).
- Weather**: A "Погода" (Weather) widget showing "0°" and "Вечером 0, ночью -1" (Evening 0, night -1).
- Traffic**: A "Пробки" (Traffic) widget showing "4" and "Ближайшие 5 часов дороги свободны" (Roads free in the next 5 hours).
- Maps**: A "Карта Москвы" (Map of Moscow) widget with links for "Метро" (Metro), "Такси" (Taxi), "Расписания" (Schedules), and "Сообщество соседей" (Neighbors community).
- Music**: A "Посещаемое" (Visited) widget with links for "Недвижимость — про регистрацию" (Real estate — registration), "Музыка — без рекламы" (Music — no ads), and "Афиша — знаменитости на сцене" (Program — celebrities on stage).
- TV listings**: A "Телепрограмма" (TV program) widget with a "Эфир" (Broadcast) button and a list of programs: "14:10 Репортаж Россия 24", "14:15 Я твоё счастье Пятница", "14:20 Пятое измерение Культура", "Сейчас в эфире" (Now on air) with "Беды батюшки Амура Ocean TV", "Тор-30. Русский крутяк недели МУЗ-ТВ", and "Волейбол. Лига чемпионов-2018/2019... Старт".

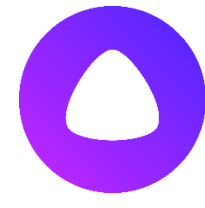
Yandex



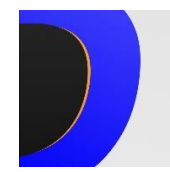
YANDEX IN EVERYDAY LIFE



Zen



Alice



Drive



Music



Maps



Weather



Navi



Taxi



Transport



Search



Disk



Ad Tech



Browser



Mail



Food



Auto.ru



Jobs



Reality



Беру!



Market



Live



KinoPoisk



Afisha



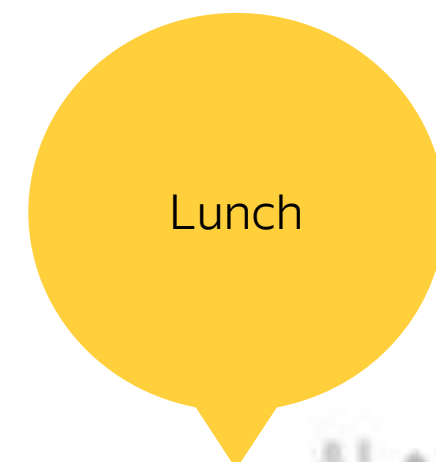
Morning



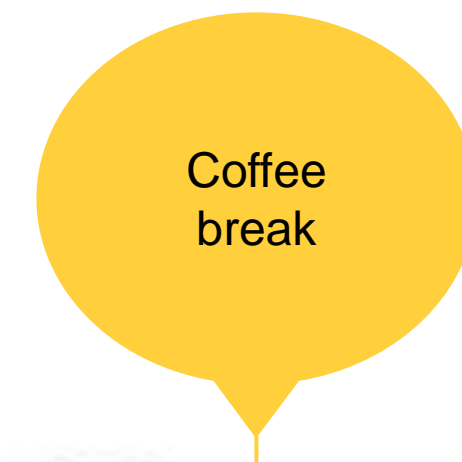
Transfer to work



Office



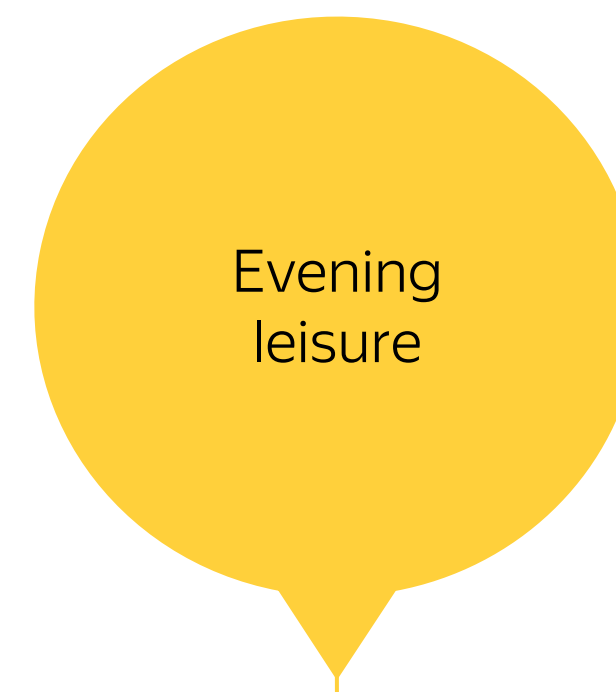
Lunch



Coffee break



Shopping



Evening leisure

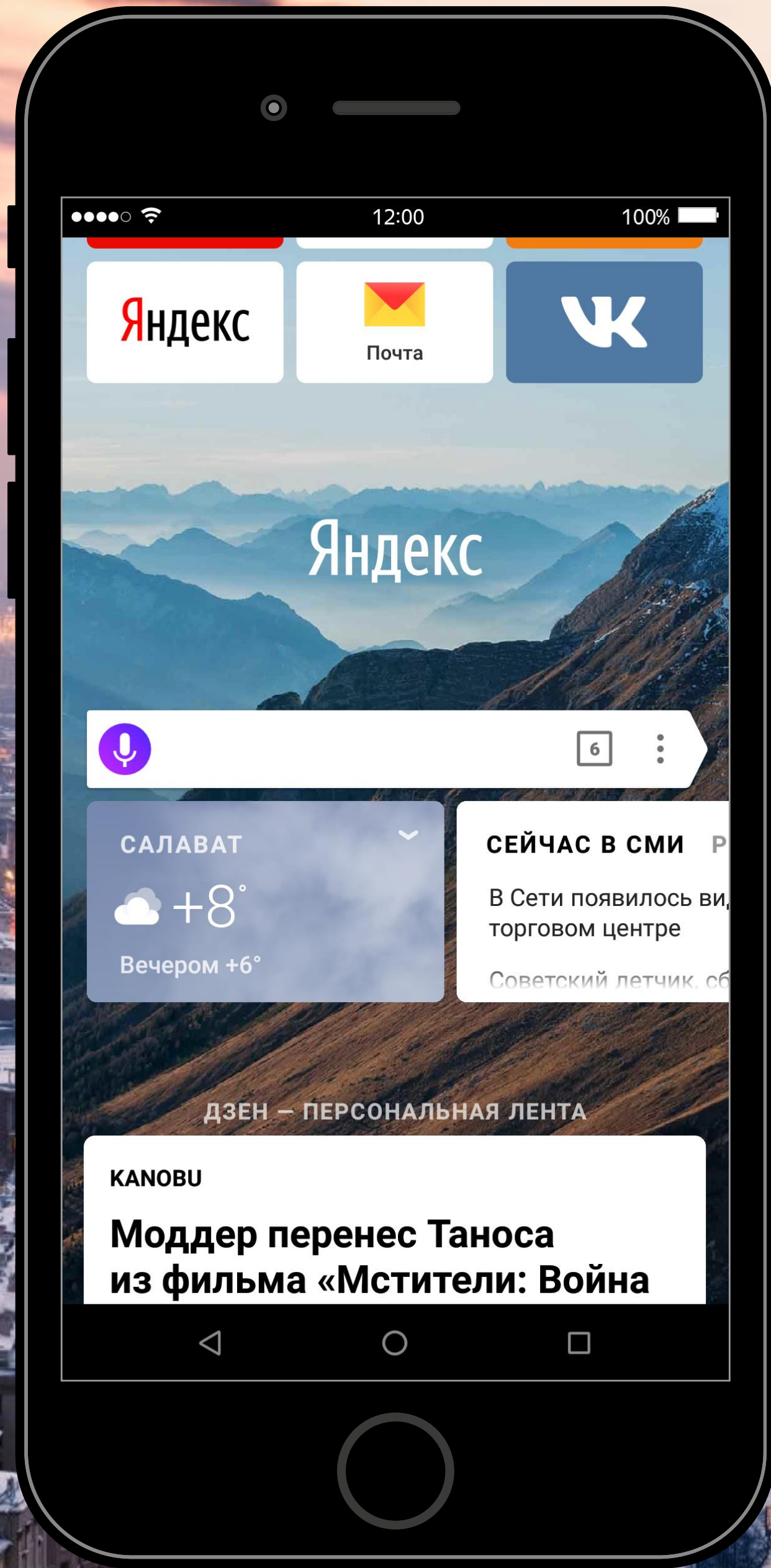


Apps

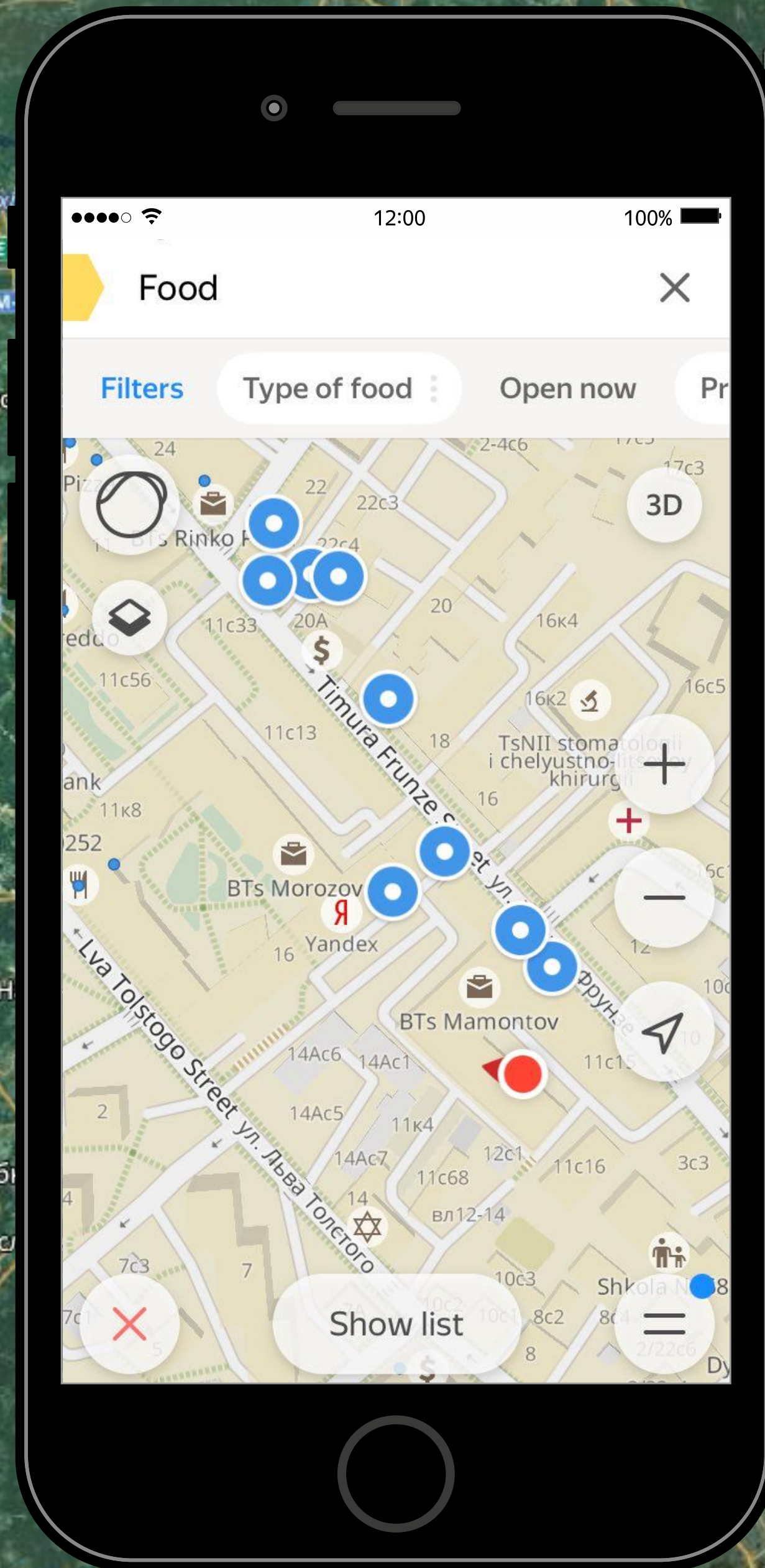
Yandex Browser

Russia's most popular alternative mobile browser

- › The first browser with virtual conversational assistant
- › Yandex Protect Technology provides data security in public Wi-Fi hotspots
- › Zen offers a personalized content feed with recommendations based on AI



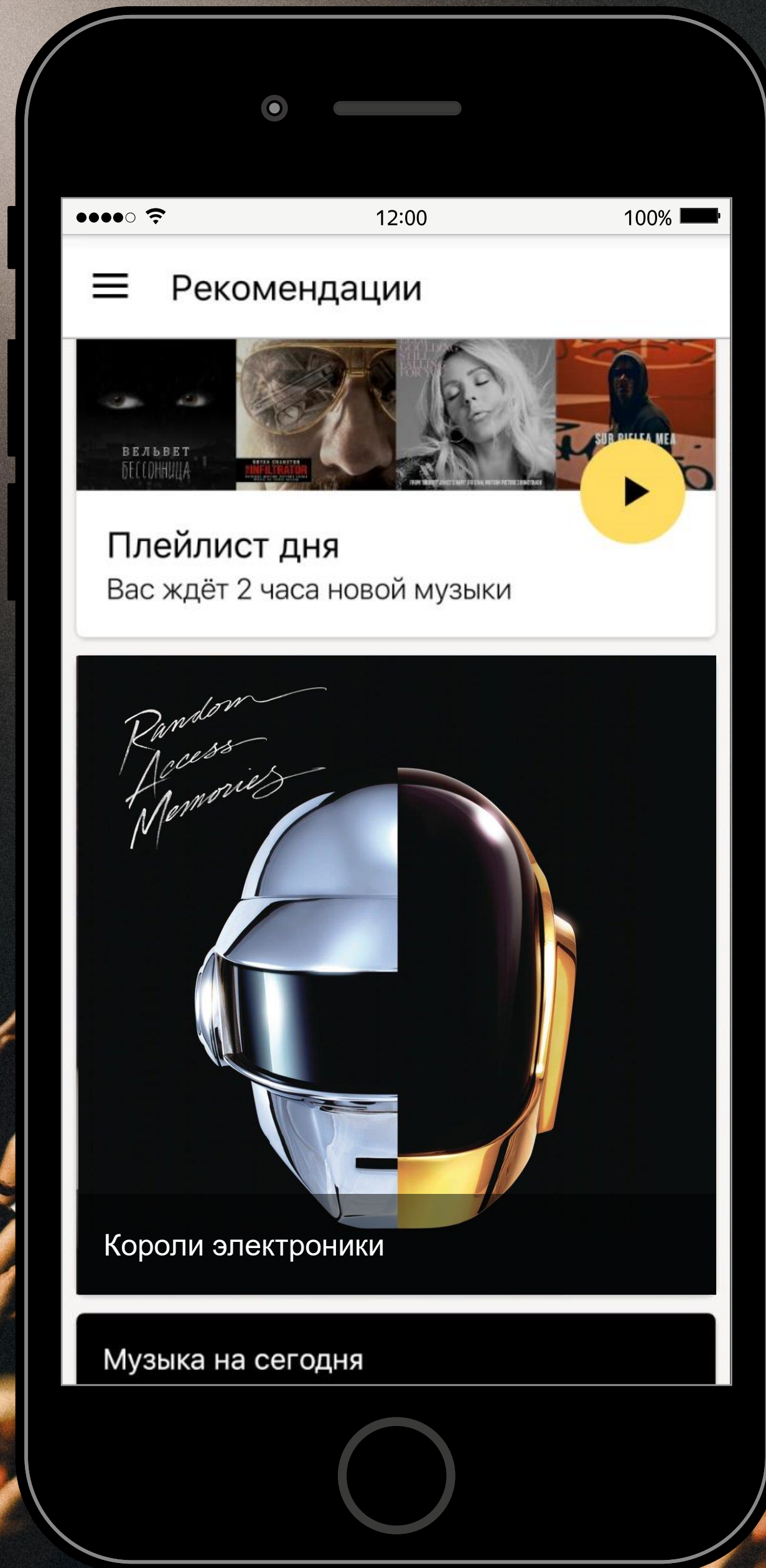
Yandex.Maps



46M monthly users find places to visit with Yandex.Maps

- › Daily online updates with 15K changes
- › UGC: thousands of contributors keep maps up to date
- › B2B solutions: routing and web/mobile API

Yandex.Music



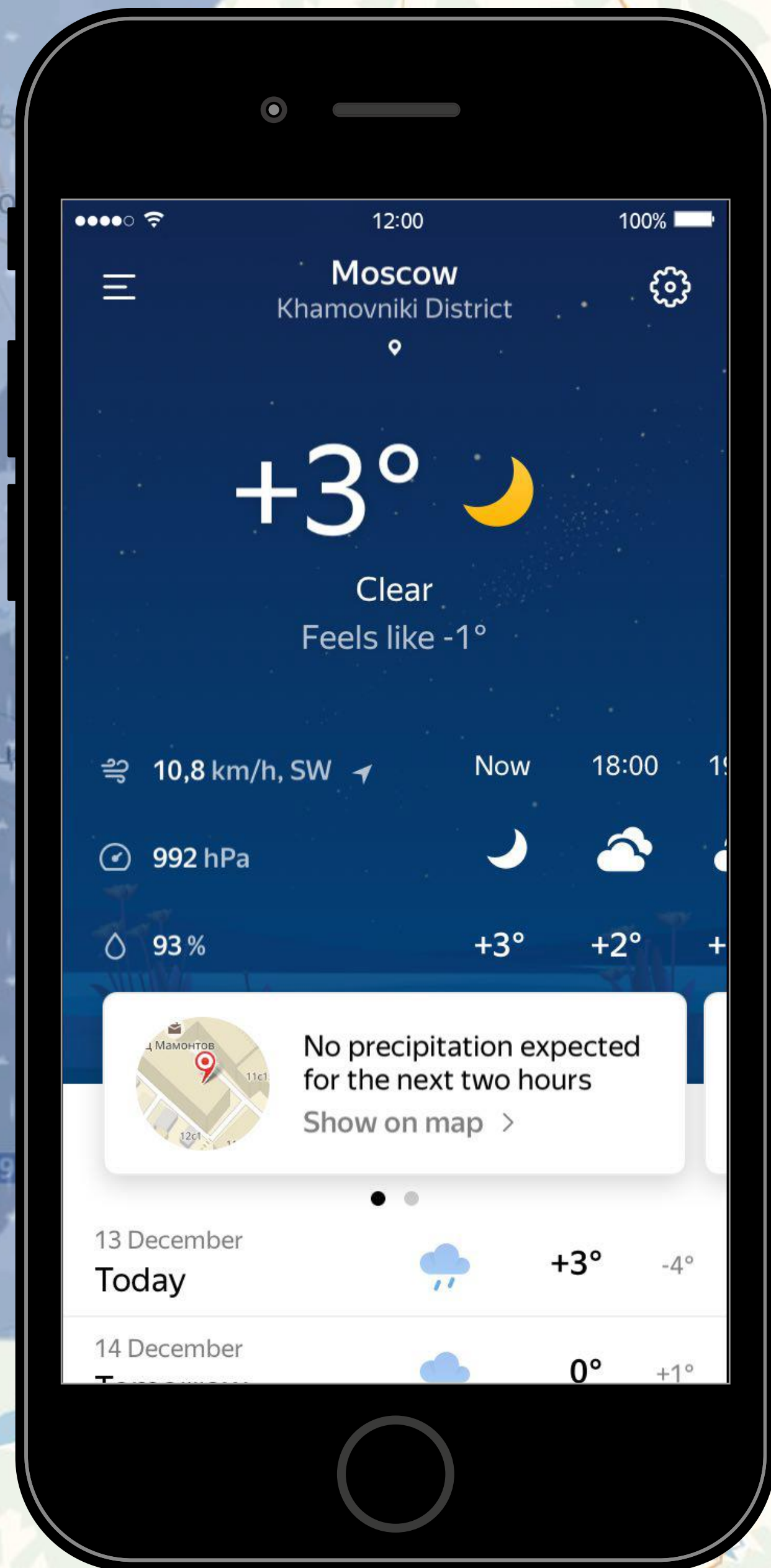
#1 music streaming service in Russia

- › Personal music recommendations based on user preferences
- › 23 000 000 tracks
- › 20 000 000 monthly listeners

Yandex.Weather

The most popular weather forecasting service in Russia

- › Over 35 M monthly users
- › Hyperlocal weather focused based on AI. Weather forecast with precision of 10 minutes
- › Top Google Play weather app
- › 5 M unique desktop users and over 3 M mobile users
- › Official technology partner of Russia's national meteorological service



Яндекс Погода

Город или район

Прогноз на 10 дней Прогноз на месяц Погода на карте Войти

Осадки Температура Ветер Давление Пыльца

Молнии

16:20 16:30 16:40 16:50 17:00 17:10 17:20 17:30 17:40 Сейчас 18:00 18:10 18:20 18:30 18:40 18:50 19:00 19:10 19:20

Automotive

Yandex.Taxi

Leading online taxi booking service in Russia

- › 1 000 000 000 rides since 2011
- › 15 countries spanning from Eastern Europe & European Union to Asia, Middle East, and Africa
- › Collaboration with Uber
- › First driverless taxi service in Europe with just a safety engineer in the passenger seat



Self-driving cars

Public road testing completed

- › Fleet of 10 vehicles for city tests and data gathering
- › Cars deliver passengers without anyone in the driver's seat
- › Ongoing urban testing since December 2017*
- › Demoed in Las Vegas at CES 2019, the biggest consumer electronics show in the world
- › The first service to offer autonomous ride-hailing in Europe in the university city of Innopolis and Skolkovo Innovation Center, Russia

*with mandatory safety driver



Yandex.Drive

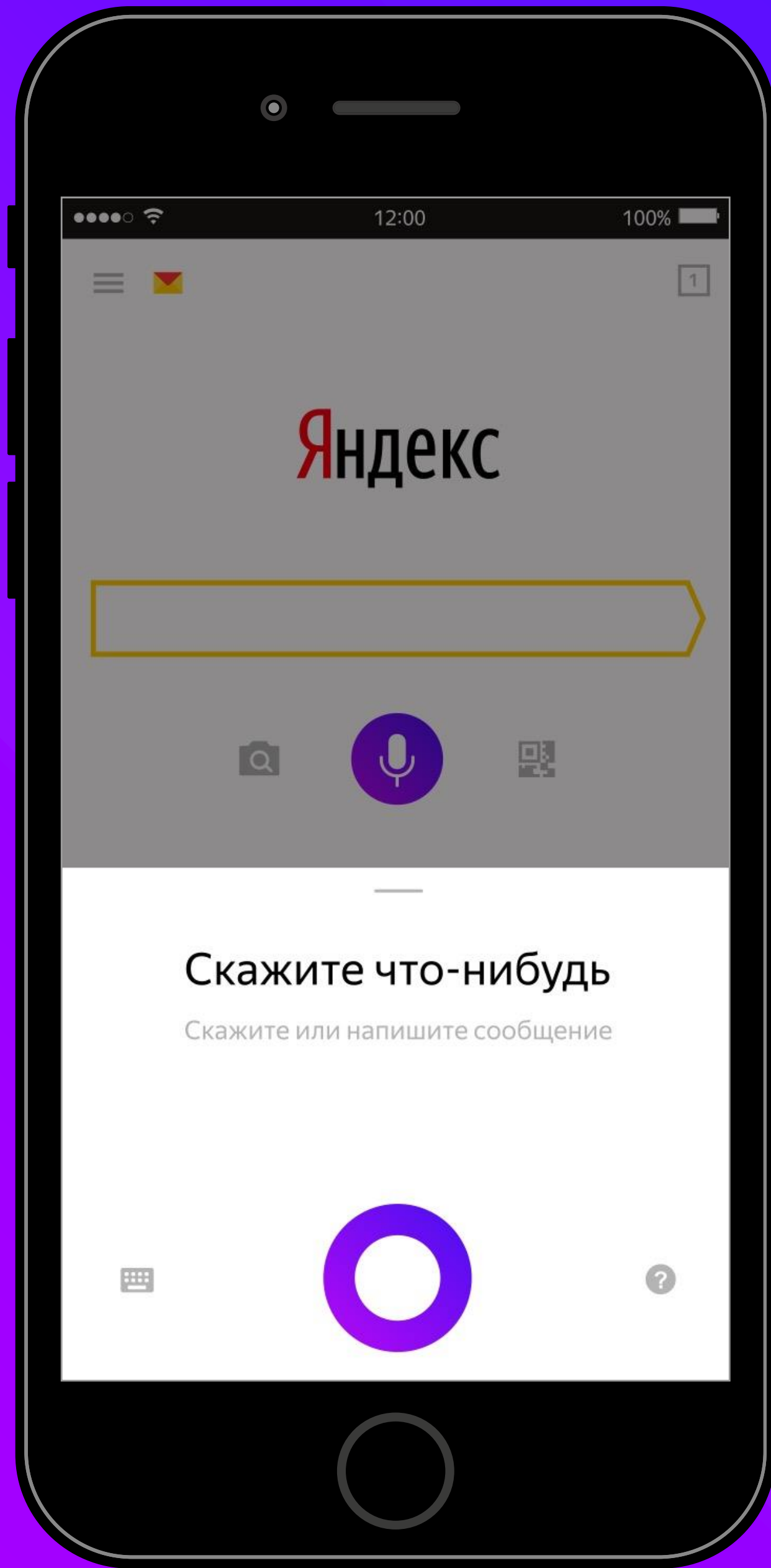
Yandex.Drive Car sharing service

- › The leading carsharing service in Russia
- 2nd in Europe
- 3rd in the world
- › Cars feature the Yandex.Auto multimedia platform with Navigator and Music
- › Approx. 2 million rides per month



9500+ cars
available

Voice

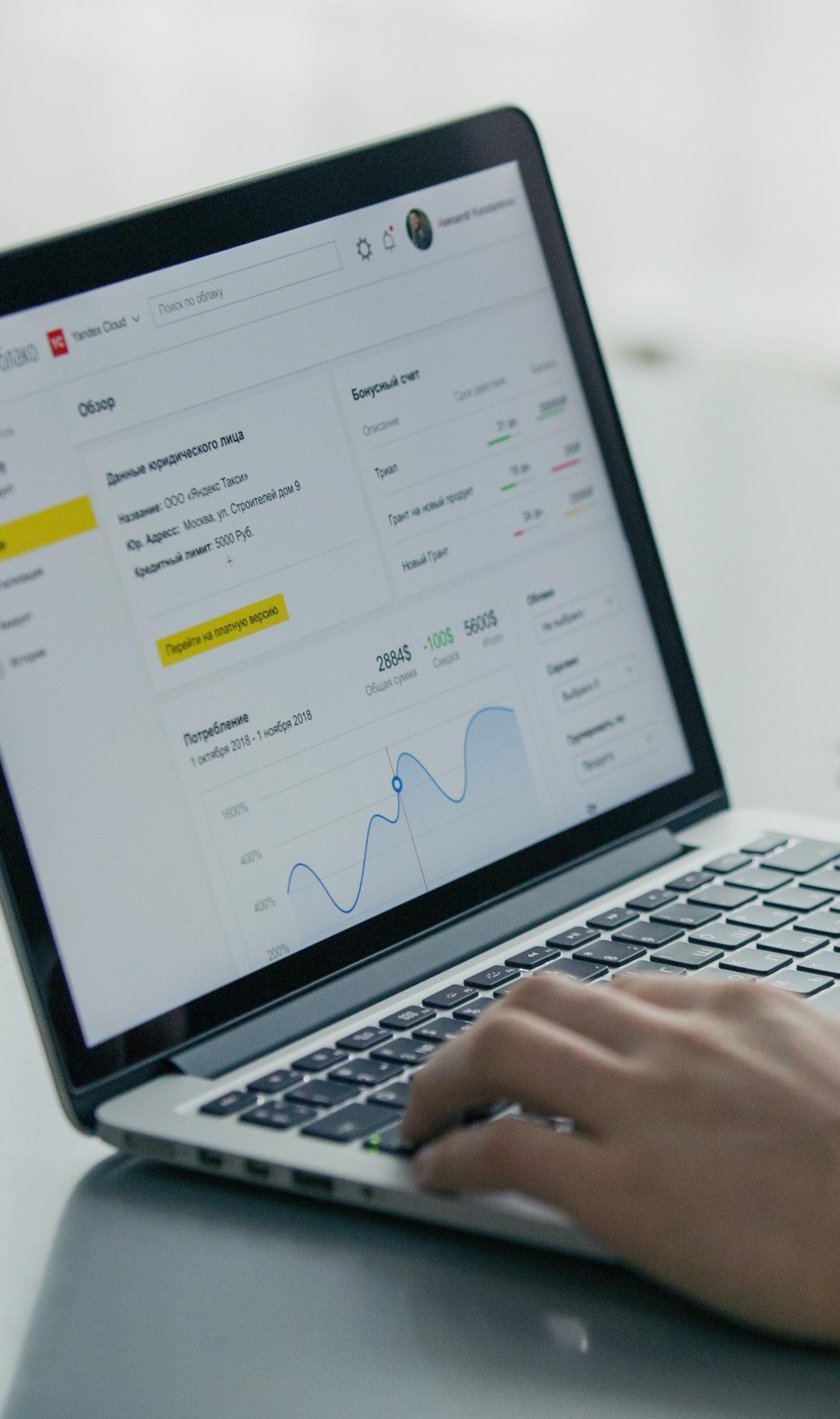


Alice

Voice assistant powered by Yandex

- › Launch: October 2017
- › Audience: 28 000 000 montly users
- › 20%: share of voice commands in Yandex Search
- › Available in: Yandex App for iOS and Android;
Yandex.Browser for iOS, Android and Windows;
Yandex.Navigator for iOS and Android;
Yandex.Launcher for Android

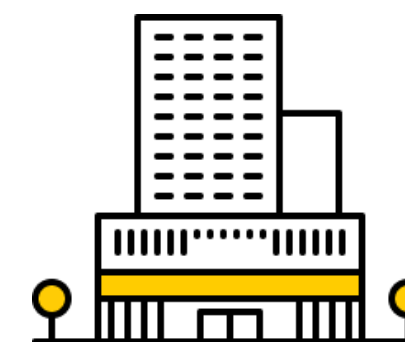
Cloud



Yandex.Cloud

Use Yandex technologies to create and develop your digital services

- › IaaS stack of technologies, Security & Compliance
- › PaaS — Data Platform & IoT, SaaS
- › Machine Learning: Speech Kit, Translate, Computer Vision
- **Yandex.Cloud customers in Russia — Porsche Russland, Conde Nast, Leroy Merlin and others**



Launched in Sept. 2018 —
10 000 users in October 2019

Yandex Advertising Ecosystem



Yandex Ecosystem

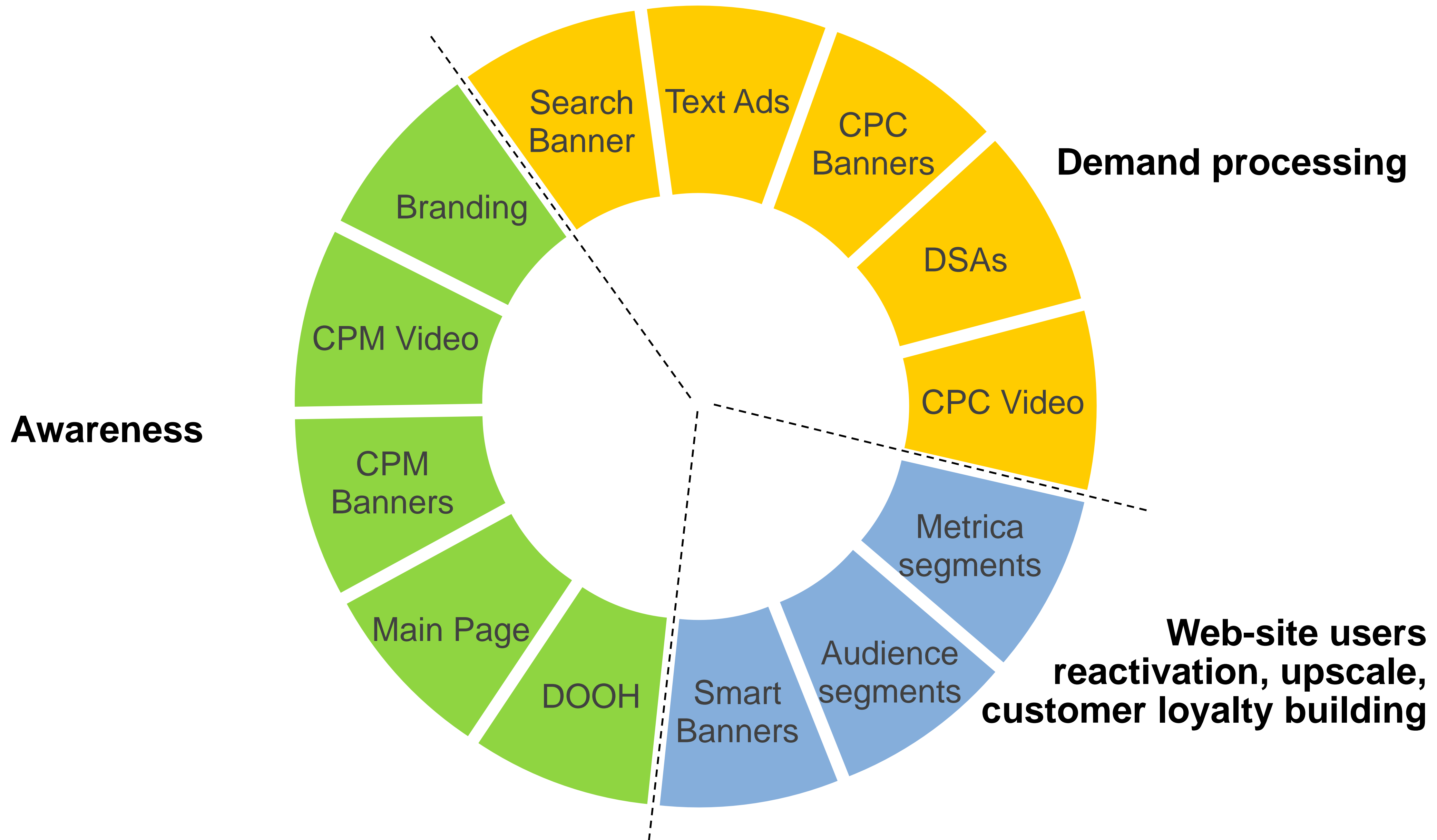
Modern advertising is building consistent, immersing communication with customers across

all media
all channels
all levels

of the purchase funnel



Yandex Advertising opportunities



A dark, moody photograph of a desk. In the center, a laptop is open, with a pair of glasses resting on its keyboard. To the right, a smartphone lies on the desk surface. The lighting is low, creating a professional and focused atmosphere.

Yandex

Thank You!

Manfred Schlosser

Head of Sales and Partnerships – Europe at Yandex

Manfred@yandex-team.com