RUSSIAN FILM MARKET OVERVIEW: 2016 RESULTS

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Background to Development of the Cinema Market

In 2016, the rate of decline slowed down and, in some sectors of economy, the negative trend even gave way to growth (for example, in industrial and agricultural production indices) compared to the catastrophic decline of the key macroeconomic indicators in 2015. At the same time, we expect growth this year in the Russian economy according to the forecast of the Ministry of Economic Development of the Russian Federation.

Despite the ruble strengthening in 2016, Russia failed to enter the top ten countries in terms of dollar-denominated box office receipts, same as in 2015, taking only 14th place. Thus, the exchange rate dynamics are still affecting box office receipts, which are calculated in US dollars.

Table 1. Box Office Receipts by Country in 2016

<table>
<thead>
<tr>
<th>No.</th>
<th>Country</th>
<th>Box office receipts (USD million)</th>
<th>2016</th>
<th>2015</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>USA</td>
<td>10,134.9</td>
<td>10,343.20</td>
<td></td>
<td>-2%</td>
</tr>
<tr>
<td>2</td>
<td>China</td>
<td>6,886.2</td>
<td>7,085.50</td>
<td></td>
<td>-3%</td>
</tr>
<tr>
<td>3</td>
<td>Japan</td>
<td>2,163.9</td>
<td>1,895.90</td>
<td></td>
<td>14%</td>
</tr>
<tr>
<td>4</td>
<td>Great Britain</td>
<td>1,657.4</td>
<td>1,580.70</td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td>5</td>
<td>France*</td>
<td>1,535.9</td>
<td>1,478,5</td>
<td></td>
<td>4%</td>
</tr>
<tr>
<td>6</td>
<td>South Korea</td>
<td>1,499.6</td>
<td>1,449.90</td>
<td></td>
<td>3%</td>
</tr>
<tr>
<td>7</td>
<td>India</td>
<td>1,485.2</td>
<td>1,793.90</td>
<td></td>
<td>-17%</td>
</tr>
<tr>
<td>8</td>
<td>Germany</td>
<td>1,132.4</td>
<td>1,294.90</td>
<td></td>
<td>-13%</td>
</tr>
<tr>
<td>9</td>
<td>Australia</td>
<td>940.5</td>
<td>921.6</td>
<td></td>
<td>2%</td>
</tr>
<tr>
<td>10</td>
<td>Mexico</td>
<td>803.5</td>
<td>840.7</td>
<td></td>
<td>-4%</td>
</tr>
<tr>
<td>11</td>
<td>Canada</td>
<td>767.7</td>
<td>786.0</td>
<td></td>
<td>-2%</td>
</tr>
<tr>
<td>12</td>
<td>Brazil</td>
<td>744.7</td>
<td>n/a</td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>13</td>
<td>Italy</td>
<td>732.5</td>
<td>n/a</td>
<td></td>
<td>n/a</td>
</tr>
<tr>
<td>14</td>
<td>Russia</td>
<td>711.3</td>
<td>722.6</td>
<td></td>
<td>-2%</td>
</tr>
</tbody>
</table>

Sources: IHS, European Audiovisual Observatory, CNC (*)

Russia retained seventh place in global cinema attendance rating, which it has held for three years in a row and has set a new attendance record, while China – the new driving force of the world market – slowed down considerably.
Table 2. Cinema Attendance by Country in 2016

<table>
<thead>
<tr>
<th>No.</th>
<th>Country</th>
<th>Admissions (million)</th>
<th>2016</th>
<th>2015</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>India</td>
<td>2,263.0</td>
<td></td>
<td>2,071.9</td>
<td>9%</td>
</tr>
<tr>
<td>2</td>
<td>China</td>
<td>1,370.0</td>
<td></td>
<td>1,253.9</td>
<td>9%</td>
</tr>
<tr>
<td>3</td>
<td>USA</td>
<td>1,315.2</td>
<td></td>
<td>1,240.0</td>
<td>6%</td>
</tr>
<tr>
<td>4</td>
<td>Mexico</td>
<td>321.0</td>
<td></td>
<td>286.0</td>
<td>12%</td>
</tr>
<tr>
<td>5</td>
<td>South Korea</td>
<td>217.0</td>
<td></td>
<td>217.3</td>
<td>0%</td>
</tr>
<tr>
<td>6</td>
<td>France**</td>
<td>213.1</td>
<td></td>
<td>205.4</td>
<td>4%</td>
</tr>
<tr>
<td>7</td>
<td>Russia</td>
<td>194.6</td>
<td></td>
<td>174.1</td>
<td>12%</td>
</tr>
<tr>
<td>8</td>
<td>Brazil</td>
<td>185.0</td>
<td></td>
<td>170.7</td>
<td>8%</td>
</tr>
<tr>
<td>9</td>
<td>Japan</td>
<td>180.1</td>
<td></td>
<td>166.6</td>
<td>8%</td>
</tr>
<tr>
<td>10</td>
<td>Great Britain</td>
<td>168.0*</td>
<td></td>
<td>171.9</td>
<td>-2%</td>
</tr>
</tbody>
</table>

Sources: IHS, European Audiovisual Observatory (*), CNC (**)
It is worth noting that the procedure includes negotiations among the interested players, and if an agreement is still not reached, the decision will be taken by the Ministry of Culture.

The beginning of 2017 has already been marred by another ambiguous initiative to raise the cost of distribution certificates from RUB 3,500 to RUB 5 million, but has still not yet been approved.

**Film Distribution**

The number of new films distributed in Russia is quite stable: in 2016, 384 films were released. Nearly the same quantity was recorded in 2015, and the peak indicators of 2013-2014 remain decisively unchallenged, of which during that time, over 400 films were released. In total, more than 500 films were screened in 2016 (excluding event cinema and regional films).

According to our estimates, box office receipts in Russia in 2016 amounted to RUB 47.5 billion, while the number of purchased tickets totalled RUB 194.6 million. Thus, in 2016 there was an explosive growth in the domestic film industry: upon three years of stagnation the attendance grew suddenly by 7.4% (in 2015 it decreased by 0.9%), and box office receipts increased by 11.6% (vs. 2.1% in 2015).
As of 1 January 2017, there were 4,364 commercial screens at 1,363 sites in Russia (the average number of screens for the cinema complex was 3.2); by 1 June 2017, the number of screens had grown by more than a hundred (up to 4,483), and the number of sites exceeded 1,400. The share of 3D screens for the last few years has remained practically on the same level, only showing a slight decrease – the rate of decline has been hampered due to the Cinema Fund’s programme for cinema development in small towns (where such screens support 3D format almost always).

In Russia, the number and share of single screen cinemas is growing due to the Cinema Fund’s programme for subsidising screens in small towns.

Table 3. Allocation of Commercial Cinemas in Russia by Number of Screens as of 1 January 2017

<table>
<thead>
<tr>
<th>Number of screens per site</th>
<th>Number of sites</th>
<th>Number of screens</th>
<th>Market share by number of screens</th>
<th>Market share by number of sites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single screen cinemas</td>
<td>552</td>
<td>552</td>
<td>12.6%</td>
<td>40.5%</td>
</tr>
<tr>
<td>Miniplexes</td>
<td>673</td>
<td>2,520</td>
<td>57.7%</td>
<td>49.4%</td>
</tr>
<tr>
<td>Multiplexes</td>
<td>134</td>
<td>1,213</td>
<td>27.8%</td>
<td>9.8%</td>
</tr>
<tr>
<td>Megaplexes</td>
<td>4</td>
<td>79</td>
<td>1.8%</td>
<td>0.3%</td>
</tr>
<tr>
<td><strong>Total in Russia</strong></td>
<td><strong>1,363</strong></td>
<td><strong>4,364</strong></td>
<td><strong>100%</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>
Table 4. Allocation of Commercial Cinemas in Russia by Number of Screens as of 1 June 2017

<table>
<thead>
<tr>
<th>Number of screens per site</th>
<th>Number of sites</th>
<th>Number of screens</th>
<th>Market share by number of screens</th>
<th>Market share by number of sites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single screen cinemas</td>
<td>599</td>
<td>599</td>
<td>13.4%</td>
<td>42.2%</td>
</tr>
<tr>
<td>Miniplexes</td>
<td>679</td>
<td>2,557</td>
<td>57.0%</td>
<td>47.8%</td>
</tr>
<tr>
<td>Multiplexes</td>
<td>138</td>
<td>1,248</td>
<td>27.8%</td>
<td>9.7%</td>
</tr>
<tr>
<td>Megaplexes</td>
<td>4</td>
<td>79</td>
<td>1.8%</td>
<td>0.3%</td>
</tr>
<tr>
<td><strong>Total in Russia</strong></td>
<td><strong>1,420</strong></td>
<td><strong>4,483</strong></td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

By the end of 2016, Cinema Park and Formula Kino retained leadership in the Russian market. In early 2016, the merger of these two leading companies was announced, but in April it turned out that the cinema chains failed to reach an agreement. Nevertheless, in the spring of 2017, Alexander Mamut acquired Cinema Park and then signed an agreement on the purchase of a 75% stake in Formula Kino from A1. In May 2017, the chains merged into one structure with a 14% market share.

The third place was taken by Premier zal, replacing KARO in fourth place. Cinema 5, ranked 14th by the end of 2015, entered the Top 10 for the first time. It should be noted that the boost of Premier zal and Cinema 5 is due to the receipt of cinemas that were opened under the Cinema Fund's programme for management or film programme planning rather than the opening of their own sites.

Table 5. Major Operators of Cinema Chains in Russia as of 1 January 2017 (including franchises and cinemas with film programme planning)

<table>
<thead>
<tr>
<th>Ranking as of 1 January 2017</th>
<th>Chain Operator</th>
<th>Number of sites</th>
<th>Number of screens</th>
<th>Market share by number of screens</th>
<th>Head office</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cinema Park</td>
<td>39</td>
<td>349</td>
<td>8.0%</td>
<td>Moscow</td>
</tr>
<tr>
<td>2</td>
<td>Formula Kino</td>
<td>35</td>
<td>264</td>
<td>6.0%</td>
<td>Moscow</td>
</tr>
<tr>
<td>3</td>
<td>Premier zal</td>
<td>161</td>
<td>234</td>
<td>5.4%</td>
<td>Yekaterinburg</td>
</tr>
<tr>
<td>4</td>
<td>KARO</td>
<td>28</td>
<td>221</td>
<td>5.1%</td>
<td>Moscow</td>
</tr>
<tr>
<td>5</td>
<td>Kinomax</td>
<td>30</td>
<td>211</td>
<td>4.8%</td>
<td>Moscow</td>
</tr>
<tr>
<td>6</td>
<td>Luxor</td>
<td>23</td>
<td>158</td>
<td>3.6%</td>
<td>Moscow</td>
</tr>
<tr>
<td>7</td>
<td>Mirage Cinema</td>
<td>21</td>
<td>145</td>
<td>3.3%</td>
<td>St. Petersburg</td>
</tr>
<tr>
<td>8</td>
<td>Cinema Star</td>
<td>25</td>
<td>129</td>
<td>3.0%</td>
<td>Moscow</td>
</tr>
<tr>
<td>9</td>
<td>Monitor</td>
<td>27</td>
<td>102</td>
<td>2.3%</td>
<td>Krasnodar</td>
</tr>
<tr>
<td>10</td>
<td>Cinema 5</td>
<td>16</td>
<td>86</td>
<td>2.0%</td>
<td>Cheboksary</td>
</tr>
<tr>
<td><strong>Total for operators</strong></td>
<td></td>
<td><strong>405</strong></td>
<td><strong>1,899</strong></td>
<td><strong>43.5%</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Total in Russia</strong></td>
<td></td>
<td><strong>1,363</strong></td>
<td><strong>4,364</strong></td>
<td><strong>100%</strong></td>
<td></td>
</tr>
</tbody>
</table>

Table 6. Major Operators of Cinema Chains in Russia as of 1 June 2017 (including franchises and cinemas with film programme planning)

<table>
<thead>
<tr>
<th>Ranking as of 1 June 2017</th>
<th>Chain Operator</th>
<th>Number of sites</th>
<th>Number of screens</th>
<th>Market share by number of screens</th>
<th>Head office</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Joint chain of CINEMA PARK and Formula Kino</td>
<td>74</td>
<td>612</td>
<td>13.7%</td>
<td>Moscow</td>
</tr>
<tr>
<td>2</td>
<td>Premier zal</td>
<td>177</td>
<td>259</td>
<td>5.8%</td>
<td>Yekaterinburg</td>
</tr>
<tr>
<td>3</td>
<td>Kinomax</td>
<td>32</td>
<td>235</td>
<td>5.2%</td>
<td>Moscow</td>
</tr>
<tr>
<td>4</td>
<td>KARO</td>
<td>28</td>
<td>216</td>
<td>4.8%</td>
<td>Moscow</td>
</tr>
<tr>
<td>5</td>
<td>Luxor</td>
<td>23</td>
<td>158</td>
<td>3.5%</td>
<td>Moscow</td>
</tr>
</tbody>
</table>
Greater Moscow is the leader among Russian regions, comprising 18.1% of Russia’s commercial cinemas according to comScore. This region traditionally brings in more than a quarter of all box office receipts owing to higher ticket prices.

### Table 7. Allocation of Commercial Cinemas in Federal Districts in Russia as of 1 January 2017

<table>
<thead>
<tr>
<th>Federal district</th>
<th>Number of sites</th>
<th>Number of screens</th>
<th>Market share by number of screens</th>
<th>Market share by admission*</th>
<th>Market share by box office receipts*</th>
<th>Average ticket price (RUB)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater Moscow</td>
<td>134</td>
<td>790</td>
<td>18.1%</td>
<td>18.6%</td>
<td>25.9%</td>
<td>339.9</td>
</tr>
<tr>
<td>Volga Federal District</td>
<td>215</td>
<td>733</td>
<td>16.8%</td>
<td>16.7%</td>
<td>13.8%</td>
<td>201.1</td>
</tr>
<tr>
<td>Central Federal District (excluding Greater Moscow)</td>
<td>227</td>
<td>632</td>
<td>14.5%</td>
<td>13.5%</td>
<td>12.3%</td>
<td>220.7</td>
</tr>
<tr>
<td>Siberian Federal District</td>
<td>180</td>
<td>492</td>
<td>11.3%</td>
<td>10.9%</td>
<td>9.5%</td>
<td>211.3</td>
</tr>
<tr>
<td>Ural Federal District</td>
<td>137</td>
<td>417</td>
<td>9.6%</td>
<td>8.3%</td>
<td>7.4%</td>
<td>217.5</td>
</tr>
<tr>
<td>Southern Federal District</td>
<td>144</td>
<td>385</td>
<td>8.8%</td>
<td>10.9%</td>
<td>10.2%</td>
<td>227.8</td>
</tr>
<tr>
<td>St. Petersburg</td>
<td>61</td>
<td>349</td>
<td>8.0%</td>
<td>8.7%</td>
<td>9.2%</td>
<td>257.4</td>
</tr>
<tr>
<td>North-West Federal District (excluding St. Petersburg)</td>
<td>107</td>
<td>264</td>
<td>6.0%</td>
<td>4.9%</td>
<td>4.4%</td>
<td>216.8</td>
</tr>
<tr>
<td>Far Eastern Federal District</td>
<td>102</td>
<td>186</td>
<td>4.3%</td>
<td>4.8%</td>
<td>5.0%</td>
<td>252.4</td>
</tr>
<tr>
<td>North Caucasian Federal District</td>
<td>56</td>
<td>116</td>
<td>2.7%</td>
<td>2.5%</td>
<td>2.3%</td>
<td>222.4</td>
</tr>
</tbody>
</table>

*Sources: Nevafilm Research, comScore (*)

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Price: RUB 50,000 + 18% VAT

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