

# CINEMA MARKET

**DECEMBER 2016**

MARKET STATISTICS OF THE RUSSIAN FILM INDUSTRY

BY NEVAFILM RESEARCH AND RUSSIAN FILM BUSINESS TODAY

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	2	10.03.2017	01.03.2017	February 2017		
	3	10.04.2017	01.04.2017	March 2017		
	4	10.05.2017	01.05.2017	April 2017		
	5	13.06.2017	01.06.2017	May 2017		
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# CONTENTS

<b>CINEMA EXHIBITION IN RUSSIA</b>	<b>3</b>
<b>FILM DISTRIBUTION</b>	<b>8</b>
<b>DISTRIBUTION OF RUSSIAN FILMS</b>	<b>11</b>
<b>RUSSIAN BEST EXHIBITORS INDEX</b>	<b>12</b>
<b>DIGITAL EQUIPMENT FOR NEW SCREENS</b>	<b>14</b>

# CINEMA EXHIBITION IN RUSSIA

INDICATOR	AS OF 01.12.2016	AS OF 01.01.2017
Commercial cinemas	1,313	1,387
number of sites opened in the previous month	29	75
number of sites shut down in the previous month	0	-1
Commercial cinemas	4,241	4,372
number of screens opened in the previous month	47	135
number of screens shut down in the previous month	-2	-4
3D screens	3,337	3,437
IMAX cinemas	44	44
Other PLF-screens	17	17
4DX screens	9	9
D-BOX screens	25	25
Dolby Atmos screens	70	74
Barco Auro-3D screens	28	28

Source: Nevafilm Research

## Cumulative total of sites and screens opened and shut down for the year

INDICATOR	2015	2016
Number of sites opened since the start of the year	87	223
Number of sites shut down since the start of the year	-71	-21
Number of screens opened since the start of the year	378	448
Number of screens shut down since the start of the year	-183	-80

Source: Nevafilm Research

## Commercial cinemas by the number of screens in Russia as of 1 January 2017

NUMBER OF SCREENS PER SITE	NUMBER OF SITES	NUMBER OF SCREENS	SHARE BY NUMBER OF SITES, %	SHARE BY NUMBER OF SCREENS, %
<b>SINGLE SCREEN CINEMAS</b>	<b>579</b>	<b>579</b>	<b>41.7%</b>	<b>13.2%</b>
Two screens	233	466	16.8%	10.7%
Three screens	108	324	7.8%	7.4%
Four screens	116	464	8.4%	10.6%
Five screens	81	405	5.8%	9.3%
Six screens	76	456	5.5%	10.4%
Seven screens	58	406	4.2%	9.3%
<b>MINIPLEXES, TOTAL</b>	<b>672</b>	<b>2,521</b>	<b>48.4%</b>	<b>57.7%</b>
Eight screens	63	504	4.5%	11.5%
Nine screens	34	306	2.5%	7.0%
10 screens	18	180	1.3%	4.1%
11 screens	8	88	0.6%	2.0%
12 screens	4	48	0.3%	1.1%
13 screens	4	52	0.3%	1.2%
14 screens	0	0	0.0%	0.0%
15 screens	1	15	0.1%	0.3%
<b>MULTIPLEXES, TOTAL</b>	<b>132</b>	<b>1,193</b>	<b>9.5%</b>	<b>27.3%</b>
17 screens	2	34	0.1%	0.8%
22 screens	1	22	0.1%	0.5%
23 screens	1	23	0.1%	0.5%
<b>MEGAPLEXES, TOTAL</b>	<b>4</b>	<b>79</b>	<b>0.3%</b>	<b>1.8%</b>
<b>TOTAL</b>	<b>1,387</b>	<b>4,372</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Nevafilm Research

## Fragmentation of the cinema exhibition market in Russia by types of exhibitors as of 1 January 2017

TYPE OF EXHIBITOR	NUMBER OF EXHIBITORS	NUMBER OF SITES	NUMBER OF SCREENS	MARKET SHARE BY NUMBER OF SCREENS, %
Federal chains	32	574	2,471	56.5%
Regional chains	18	66	246	5.6%
Local chains	55	204	476	10.9%
Independent cinemas	543	543	1,179	27.0%
<b>TOTAL IN RUSSIA</b>	<b>648</b>	<b>1,387</b>	<b>4,372</b>	<b>100%</b>

Source: Nevafilm Research

## TOP 20 major operators of cinema chains in Russia as of 1 January 2017

(including franchises and cinemas with film programme planning)

RANKING	CHAIN OPERATOR	NUMBER OF SITES	NUMBER OF SCREENS	MARKET SHARE BY NUMBER OF SCREENS	HEAD OFFICE
1	Cinema Park	39	348	8.0%	Moscow
2	Formula Kino	35	263	6.0%	Moscow
3	Premier-zal	161	231	5.3%	Yekaterinburg
4	KARO	28	221	5.1%	Moscow
5	Kinomax	30	211	4.8%	Moscow
6	Luxor	23	157	3.6%	Moscow
7	Mirage Cinema	21	145	3.3%	St. Petersburg
8	Cinema Star	25	129	3.0%	Moscow
9	Monitor	27	102	2.3%	Krasnodar
10	Cinema 5	15	77	1.8%	Cheboksary
11	Mori Cinema	10	65	1.5%	Moscow
12	5 Zvezd	10	59	1.3%	Moscow
13	OptimaKino	19	52	1.2%	Moscow
14	Grand Cinema	8	48	1.1%	Moscow
15	Barguzin	9	46	1.1%	Irkutsk
16	Kinoformat	9	41	0.9%	Volgograd
17	Kino City	18	40	0.9%	St. Petersburg
18	Kubankino	29	35	0.8%	Krasnodar
19	Imperia Grez – Electronics	8	34	0.8%	Nizhny Novgorod
20	Megapolis (Imperia Igr)	4	29	0.7%	Chelyabinsk
<b>TOTAL OPERATORS</b>		<b>528</b>	<b>2,333</b>	<b>53.4%</b>	
<b>TOTAL IN RUSSIA</b>		<b>1,387</b>	<b>4,372</b>	<b>100.0%</b>	

Source: Nevafilm Research

## TOP 10 major operators of cinema chains in Russia as of 1 January 2017

(excluding franchises and cinemas with film programme planning)

RANKING	CHAIN OPERATOR	NUMBER OF SITES	NUMBER OF SCREENS	MARKET SHARE BY NUMBER OF SCREENS	HEAD OFFICE
1	Cinema Park	39	348	8.0%	Moscow
2	Formula Kino	35	263	6.0%	Moscow
3	KARO	28	221	5.1%	Moscow
4	Kinomax	27	194	4.4%	Moscow
5	Luxor	23	157	3.6%	Moscow
6	Mirage Cinema	21	145	3.3%	St. Petersburg
7	Cinema Star	25	129	3.0%	Moscow
8	Mori Cinema	10	65	1.5%	Moscow
9	Monitor	14	61	1.4%	Krasnodar
10	5 Zvezd	10	59	1.3%	Moscow
<b>TOTAL OPERATORS</b>		<b>232</b>	<b>1,642</b>	<b>37.6%</b>	
<b>TOTAL IN RUSSIA</b>		<b>1,387</b>	<b>4,372</b>	<b>100.0%</b>	

Source: Nevafilm Research

## Changes in membership at major chains for December 2016

(excluding franchises and cinemas with film programme planning)

RANKING AS OF 01.01.2017	RANKING AS OF 01.12.2016	CHAIN OPERATOR	NUMBER OF SITES	NUMBER OF SCREENS
1	1	Cinema Park	2	13
2	2	Formula Kino	0	-3
3	3	KARO	0	0
4	4	Kinomax	0	0
5	5	Luxor	0	0
6	6	Mirage Cinema	0	0
7	7	Cinema Star	1	5
8	8	Mori Cinema	0	0
9	9	Monitor	0	0
10	10	5 Zvezd	0	0

Source: Nevafilm Research

## TOP 10 chains opened/shut down in December 2016

(excluding franchises and cinemas with film programme planning)

CHAIN	CITY	CINEMA NAME	NUMBER OF SITES	NUMBER OF SCREENS	CHANGES
Cinema Park	Kovrov	Cinema Park at the shopping and leisure centre Kovrov Mall	1	4	cinema opened
Cinema Park	Tula	Cinema Park at the shopping and leisure centre Maxi	1	8	cinema opened
Cinema Park	Naberezhnye Chelny	Cinema Par – Torgovy Kvartal	0	1	opened after renovation
Formula Kino	Moscow	Formula Kino – Europe	0	-3	closed for renovation
Cinema Star	Moscow	Cinema Star – Europark	1	5	cinema opened

Source: Nevafilm Research

# FILM DISTRIBUTION

MONTHLY DATA	DECEMBER 2016 (28.11.16-31.12.16)	VS.			
		NOVEMBER 2016 (24.10.16-27.11.16)		DECEMBER 2015 (30.11.15-31.12.15)	
Box office receipts (USD million)	63.8	-21.3%	(81.0)	+40.2%	(45.5)
Box office receipts (RUB million)	4,018.0	-22.0%	(5,149.2)	+19.4%	(3,364.2)
Attendance (million people)	16.2	-21.3%	(20.6)	+29.2%	(12.5)
Ticket price (USD)	3.9	-0.0%	(3.9)	+8.5%	(3.6)
Ticket price (RUB)	248.1	-0.9%	(250.4)	-7.6%	(268.5)
<b>AVERAGE CINEMA SCREENS FOR THE PERIOD</b>	<b>4,295.9</b>	<b>+2.1%</b>	<b>(4,209.5)</b>	<b>+9.1%</b>	<b>(3,936.3)</b>
Box office monthly receipts per screen (USD thousand)	114.9	-22.8%	(19.2)	+28.5%	(11.6)
Box office monthly receipts per screen (RUB thousand)	935.3	-23.5%	(1,223.2)	+9.4%	(854.7)
Monthly attendance per screen (thousand people)	3.8	-22.8%	(4.9)	+18.4%	(3.2)

Sources: Russian Film Business Today (data for CIS excluding Ukraine),  
Nevafilm Research (evaluation for Russia)



<b>CUMULATIVE ANNUAL TOTAL</b>	<b>2016 (01.01.16-31.12.16)</b>	<b>VS. 2015 (01.01.15-31.12.15)</b>	
Box office receipts (USD million)	722.5	-3.1%	(745.6)
Box office receipts (RUB million)	48,548.5	+9.4%	(44,359.2)
Attendance (million people)	193.5	+10.1%	(175.7)
Ticket price (USD)	3.7	-12.0%	(4.2)
Ticket price (RUB)	250.9	-0.6%	(252.4)
<b>AVERAGE CINEMA SCREENS FOR THE PERIOD</b>	<b>4,094.5</b>	<b>+6.0%</b>	<b>(3,862.2)</b>
Box office monthly receipts per screen (USD thousand)	176.4	-8.6%	(193.1)
Box office monthly receipts per screen (RUB thousand)	11 857,0	+3.2%	(11,485.5)
Monthly attendance per screen (thousand people)	47,3	+3.9%	(45.5)

Sources: Russian Film Business Today (data for CIS excluding Ukraine),  
Nevafilm Research (evaluation for Russia)

According to Nevafilm Research, in H1 the Russian share of CIS box office receipts comprised 90,35% (by attendance) and 91,83% (by box office receipts), based on data from seven distributors: Bazelevs, WDSSPR, Central Partnership, 20th Century Fox CIS, UPI, Volga and Exponenta.

The indicator for one screen is calculated based on the average number of operating screens for the period.

**REFERENCE: data on attendance by box office receipts from other sources**

DECEMBER 2016	01.12.16-31.12.16				28.11.16-31.12.16
	COMSCORE (RUSSIA)	CAIS – FEDERAL CONSOLIDATED AUTOMATED INFORMATION SYSTEM (RUSSIA)	BOOKER'S BULLETIN (CIS EXCLUDING UKRAINE)	RUSSIAN FILM BUSINESS TODAY (CIS EXCLUDING UKRAINE)	RUSSIAN FILM BUSINESS TODAY (CIS EXCLUDING UKRAINE)
Box office receipts (USD million)	60.0	—	—	65.1	69.2
Box office receipts (RUB million)	3,748.6	3,766.5	4,134.5	4,105.7	4,355.5
Attendance (million people)	14.8	114.9	16.5	16.7	17.6
Ticket price (USD)	4.0	—	—	3.9	3.9
Ticket price (RUB)	253.1	252.8	251.0	246.4	247.7

NOVEMBER 2016	01.11.16-30.11.16				24.10.16-27.11.16
	COMSCORE (RUSSIA)	CAIS (RUSSIA)	BOOKER'S BULLETIN (CIS EXCLUDING UKRAINE)	RUSSIAN FILM BUSINESS TODAY (CIS EXCLUDING UKRAINE)	RUSSIAN FILM BUSINESS TODAY (CIS EXCLUDING UKRAINE)
Box office receipts (USD million)	68.8	—	—	74.1	87.8
Box office receipts (RUB million)	4,396.9	4,339.0	4,741.2	4,715.7	5,581.7
Attendance (million people)	17.4	17.2	19.1	19.0	22.3
Ticket price (USD)	4.0	—	—	3.9	3.9
Ticket price (RUB)	253.3	252.8	248.1	248.1	250.0

# DISTRIBUTION OF RUSSIAN FILMS

MONTH	NUMBER OF RUSSIAN RELEASES, EXCLUDING ALTERNATIVE CONTENT AND REGIONAL FILMS (CALENDAR MONTH)	BOX OFFICE RECEIPTS (RUB MILLION)	ATTENDANCE (MILLION PEOPLE)
January 2015 (01.01.15-01.02.15)	11 (33.3%)	2481.5 (36.2%)	10.1 (39.6%)
February 2015 (02.02.15-01.03.15)	10 (32.3%)	706.5 (16.6%)	3.0 (17.9%)
March 2015 (02.03.15-29.03.15)	7 (21.9%)	880.3 (22.8%)	3.6 (22.1%)
April 2015 (30.03.15-26.04.15)	6 (15.8%)	869.0 (21.7%)	4.1 (26.2%)
May 2015 (27.04.15-31.05.15)	4 (16.0%)	624.0 (19.4%)	2.7 (21.7%)
June 2015 (01.06.15-28.06.15)	7 (28.0%)	99.1 (2.6%)	0.5 (2.9%)
<b>TOTAL FOR H1 2015</b>	<b>45 (24.5%)</b>	<b>5660.3 (21.7%)</b>	<b>23.9 (23.4%)</b>
July 2015 (29.06.15-26.07.15)	3 (10.3%)	75.6 (1.6%)	0.4 (1.9%)
August 2015 (27.07.15-30.08.15)	2 (9.5%)	67.2 (2.1%)	0.3 (2.5%)
September 2015 (31.08.15-27.09.15)	10 (33.3%)	248.5 (10.5%)	1.2 (11.7%)
October 2015 (28.09.15-25.10.15)	12 (33.3%)	387.2 (10.6%)	1.7 (12.5%)
November 2015 (26.10.15-29.11.15)	12 (33.3%)	501.9 (10.9%)	2.5 (13.2%)
December 2015 (30.11.15-31.12.15)	9 (28.1%)	516.9 (14.2%)	2.1 (15.7%)
<b>TOTAL FOR 2015</b>	<b>93 (25.3%)</b>	<b>7457.6 (15.5%)</b>	<b>32.1 (16.8%)</b>
January 2016 (01.01.16-31.01.16)	8 (26.7%)	2275.8 (36.2%)	9.0 (37.9%)
February 2016 (01.02.16-28.02.16)	10 (27.0%)	725.7 (16.5%)	2.9 (16.8%)
March 2016 (29.02.16-27.03.16)	14 (33.3%)	775.9 (16.3%)	3.4 (18.1%)
April 2016 (28.03.16-24.04.16)	9 (29.0%)	973.3 (28.5%)	3.7 (27.7%)
May 2016 (25.04.16-29.05.16)	4 (13.3%)	1175.4 (23.1%)	4.6 (23.2%)
June 2016 (30.05.16-26.06.16)	6 (24.0%)	116.7 (2.8%)	0.5 (3.0%)
<b>TOTAL FOR H1 2016</b>	<b>51 (26.2%)</b>	<b>6042,9 (21,5%)</b>	<b>24.2 (21.8%)</b>
July 2016 (27.06.16-24.07.16)	2 (6.9%)	55.8 (1.6%)	0.3 (2.2%)
August 2016 (25.07.16-28.08.16)	4 (18.2%)	90.5 (1.7%)	0.4 (1.9%)
September 2016 (29.08.16-25.09.16)	7 (19.4%)	487.7 (16.5%)	2.1 (17.3%)
October 2016 (26.09.16-23.10.16)	11 (33.3%)	746.7 (23.9%)	3.0 (23.2%)
November 2016 (24.10.16-27.11.16)	12 (33.3%)	699,4 (12.5%)	3.0 (13.4%)
December 2016 (28.11.16-31.12.16)	14 (38.9%)	1137.4 (26.1%)	5.2 (29.3%)
<b>TOTAL FOR 2016</b>	<b>101 (26.1%)</b>	<b>7457.6 (15.5%)</b>	<b>32.1 (16.8%)</b>

Source: Russian Film Business Today (data for CIS excluding Ukraine)

# BEST RUSSIAN EXHIBITORS INDEX

The **BEST RUSSIAN EXHIBITORS INDEX** is developed similarly to the “blue-chip” stock index and reflects changes in attendance per screen at the country’s best cinema chains:

- Cinema Park,
- Formula Kino,
- KARO,
- Kinomax (only its own cinemas, excluding franchises),
- Cinema Star,
- Mori Cinema,
- 5 Zvezd.

$$\text{Average daily attendance per screen at the chain} = \frac{\sum \text{Number of tickets sold at the chains}}{\text{Number of days in the period} * \sum \text{Average number of screens at the chains for the period}}$$

In December 2016, 1,269 screens participated in data monitoring for the index.

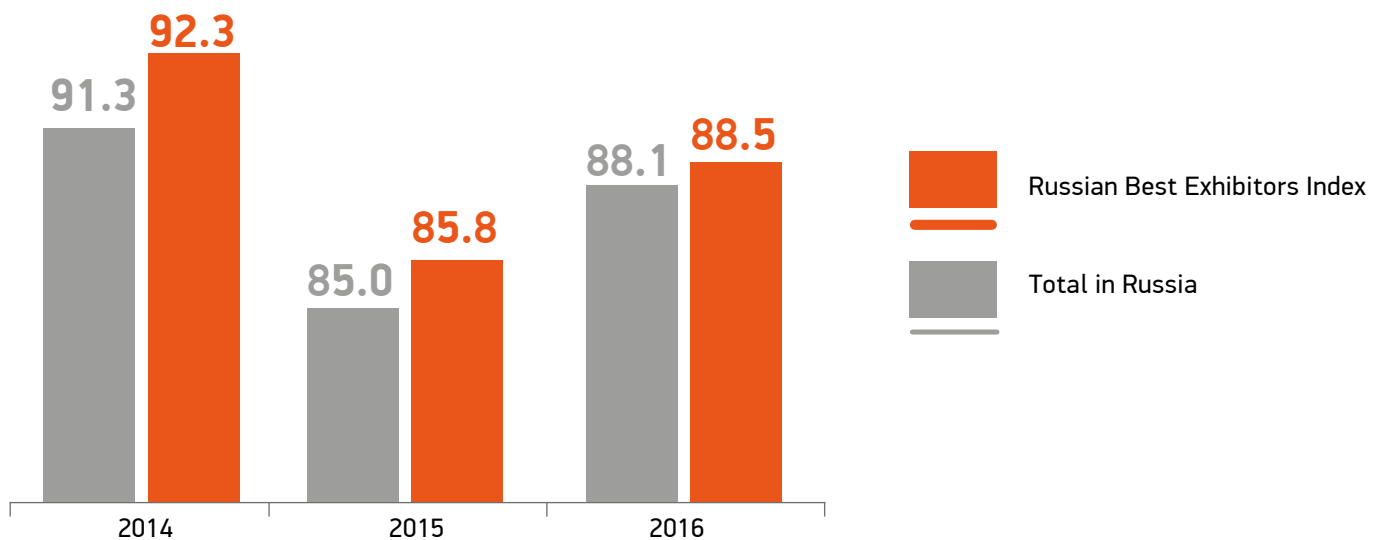
The index is the ratio of the average daily attendance per screen in the current period to the average daily attendance per screen in the base period. The index calculation base is formed with regards to an average attendance per screen in 2013 at three leading Russian cinema chains: Cinema Park, Cinema Park and KARO.

$$\text{Attendance index} = \frac{\text{Average daily attendance per screen}}{\text{Average daily attendance per screen in the base period}} * 100$$

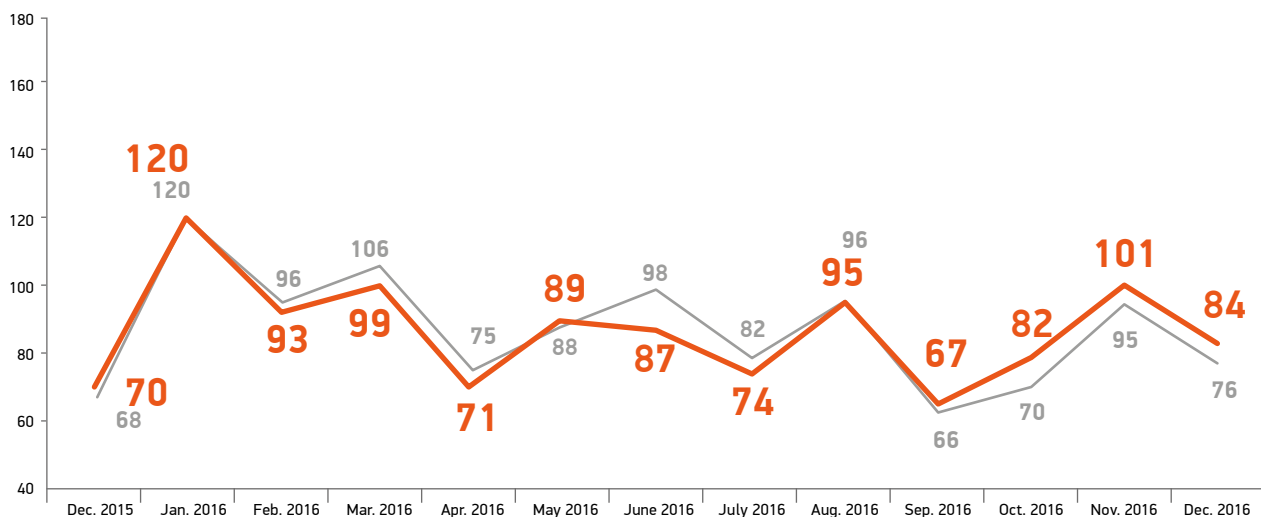
December demonstrates a traditional decline on the cinema exhibition market: in 2016, daily attendance per screen dropped by 17 points to 83. The All-Russian index dropped more significantly (by almost 20 points) and comprised 76. When compared to December 2015, attendance per screen was higher both at cinema chains and in the country in general: at that time, the index comprised 70 and 68 points respectively.

As of the end of 2016, there has been an increase in attendance per screen: indexes increased by 3 points compared to 2015, while in the previous year, there was a decrease by 7 points. In general, an increase in attendance per screen has been observed in Russia for the first time.

### Annual values dynamics of daily attendance per one screen



### Russian Best Exhibitors Index



# DIGITAL EQUIPMENT FOR NEW SCREENS

This section shows the equipment ranking of digital screens that have been installed for the specified period at newly opened cinemas in Russia, including sites that changed exhibition companies if the latter came with new equipment. Scheduled replacements of projectors, servers, and 3D systems are not reflected in the statistics.

## Projector producer ranking

PROJECTOR MODEL	NEW SCREENS IN DECEMBER 2016	ACCUMULATED TOTAL
Barco	83	1,855
Christie	36	1,823
NEC	6	451
Cinemeccanica	1	173

Source: Nevafilm Research

## Server producer ranking

SERVER MODEL	NEW SCREENS IN DECEMBER 2016	ACCUMULATED TOTAL
Doremi	14	1,641
Dolby	20	1,425
GDC	8	515
Barco	72	359
Christie	11	268
NEC	1	22

### 3D-system producer ranking

3D	NEW SCREENS IN DECEMBER 2016	ACCUMULATED TOTAL
Dolby 3D	1	1,111
RealD	7	496
XpanD 3D	1	480
Volfoni	8	486
GetD	30	182
Ivision	30	69
IMAX 3D	1	45
Hi Shock	1	33
Li-Tech	3	30
Le-vision	2	16
Freedeo	5	8
P5000	4	4
—	34	939

Source: Nevafilm Research