CINEMA FUND

RUSSIAN FILM INDUSTRY – 2019

Brief edition

ABOUT THE RESEARCH

The Cinema Fund hereby presents a summary of the "Russian Film Industry 2019" information and analytical publication, which is an annual survey of the main segments of the national film industry. This edition covers the details of film distribution and exhibition markets in the Russian Federation, the video service market, the film industry structure, the state of the Russian film industry and film-maker education, the international distribution of Russian titles, the scope and terms of government support, the status of Russian national film products on Russian television, as well as a summary of the major film festivals and film awards for 2019.

This study was conducted by the Analytical Department of the Cinema Fund.

The study is based on the data provided by the Russian Cinema Fund Analytics (RCFA) to give the fullest and most competent view on film distribution and exhibition status in the Russian Federation.

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FILM DISTRIBUTION

> The Russian film distribution market is currently the largest European market by the number of tickets sold: 219.4 million admissions in Russian cinemas in 2019.

More than 200 million tickets have been sold annually for film exhibitions in Russian cinemas since 2017, making it a top-10 film distribution market by admissions. As of 2019, the Russian national cinema market was the largest European market by the number of tickets sold. The top-5 also included France, UK, Germany and Italy that sold 213.3 million, 176.1 million, 118.6 million and 104.7 million tickets respectively.

Calendar figures of Russian and foreign films*, 2019

	Box office, rub bln	Admissions, million	Screenings, million	Average ticket price, RUB	Average ticket price, USD
Russian titles	12.268	50.6	2.8	242.5	3.68
Foreign titles	43.199	168.8	7.7	255.9	3.95
Total	55.467	219.4	10.5	252.8	3.89
Share of Russian titles	**22.1%**	**23.1%**	**26.9%**		

** From January 01, 2019 to December 31, 2019.*
Source: RCFA

> The Russian national film distribution market peaked at RUB 55.5 billion (USD 857 million), which is the highest value in the modern history of Russian film distribution, with just over 20 years in the market.

In 2019 the total box office revenue in the Russian Federation was RUB 55.5 billion (USD 857 million), 219.4 million tickets were sold in Russian cinemas. Compared to 2018, the growth rate was + 10.3% for box office and + 9.5% for the number of tickets sold. The average ticket price increased by 0.7% to RUB 252.8 (USD 3.89).

The growth of the Russian national market in 2019 was due to an unprecedented density of highly anticipated Hollywood releases: just two titles – ***The Lion King*** and ***Avengers: Endgame***, grossed over RUB 2.5 billion each, and, 11 more films grossed over RUB 1 billion each during the year. Foreign titles grossed RUB 43.2 billion (USD 667.5 million), which is 18.4% higher than in 2018.

In 2019, the box office of Russian titles was RUB 12.3 billion (22.1% of the total box office) or USD 186 million; 50.6 million admissions for Russian titles in the country's cinemas (23.1% of the total number of tickets). Although the Russian national cinema indicators were below their record highs of 2018 (RUB 13.8 billion and 57.9 million viewers), nevertheless they made a significant contribution to the development of the Russian film distribution market. For the third year in a row, we register at least 50 million admissions for Russian titles, and the share of Russian titles well exceeded the 20% threshold for box office and admissions.

The growth of the total market volume has contributed to an increase in the maximum box office per release: seven titles have grossed over RUB 2 billion box office in Russian distribution over the past 10 years, four of which were released in 2019.

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First on the list of the top-10 highest-grossing releases of 2019 was the Russian comedy ***Son of a Rich*** directed by Klim Shipenko. The title was released late in the year, and became the highest grossing Russian title after collecting RUB 3.1 billion ($ 49.6 million). The title recorded 11.6 million admissions across Russia. The war film ***T-34*** directed by Alexey Sidorov was the third Russian title to gross over RUB 2 billion in distribution, ranking fourth in the list of the highest grossing titles of 2019: the picture totalled to 8.8 million admissions, and the box office grossed RUB 2.3 billion.

Top-10 Releases of 2019 at the Russian Box Office

No.	Film title	Release date	Country	Genre	Distributor	Box office, rub bln	Box office, USD million	Admissions, million
1	Son of a Rich	26 December	Russia	Comedy	CP	3.073	49.6	11.6
2	The Lion King	18 July	USA	Animation	WDSSPR	2.635	41.4	10.9
3	Avengers: Endgame	29 April	USA	Comic	WDSSPR	2.576	39.8	8.7
4	T-34	01 January	Russia	War film	CP	2.271	33.2	8.8
5	Maleficent: Mistress of Evil	17 October	USA	Fantasy	WDSSPR	1.912	29.9	7.6
6	Joker	03 October	USA, Canada	Thriller	CAO	1.890	29.3	6.8
7	Frozen II	28 November	USA	Animation	WDSSPR	1.827	28.7	7.5
8	How to Train Your Dragon: The Hidden World	21 February	USA	Animation	UPI	1.689	25.8	7.2
9	The Secret Life of Pets 2	25 May	USA, France, Japan	Animation	UPI	1.479	22.8	6.9
10	Aladdin	23 May	USA	Musical	WDSSPR	1.215	18.8	4.9

Source: RCFA. Data as of 20 March 2020.
CP – Central Partnership, CAO – Karo Premiere, UPI – Universal Pictures International Russia, WDSSPR – Walt Disney Studios Sony Pictures Releasing.

There are about 60 distribution companies operating in the Russian film distribution market, with approximately 90% of box office and admissions (88% in 2019) coming from the five largest distributors. Over a third of the total box office for movies released in 2019 was generated by titles released by Walt Disney Studios Sony Pictures Releasing (36.6%, RUB 20.8 billion, 41 releases). Central Partnership has released 38 titles, which accounted for 19.7% of the total box office for 2019 releases (RUB 11.2 billion), while Universal Pictures International released 18 titles (12.6%, RUB 7.2 billion). A further 12.2% of the total box office for 2019 releases was grossed by 24 titles released by Karo Premiere in collaboration with Karoprokat (RUB 6.9 billion, of which RUB 1.1 billion was grossed by 10 Russian titles released by Karoprokat). Twentieth Century Fox CIS has released 14 titles (7.4%, RUB 4.2 billion). A little over RUB 1 billion was grossed by titles released by Volga and Nashe Kino (2.4%, RUB 1.3 billion and 2.0%, RUB 1.1 billion respectively).

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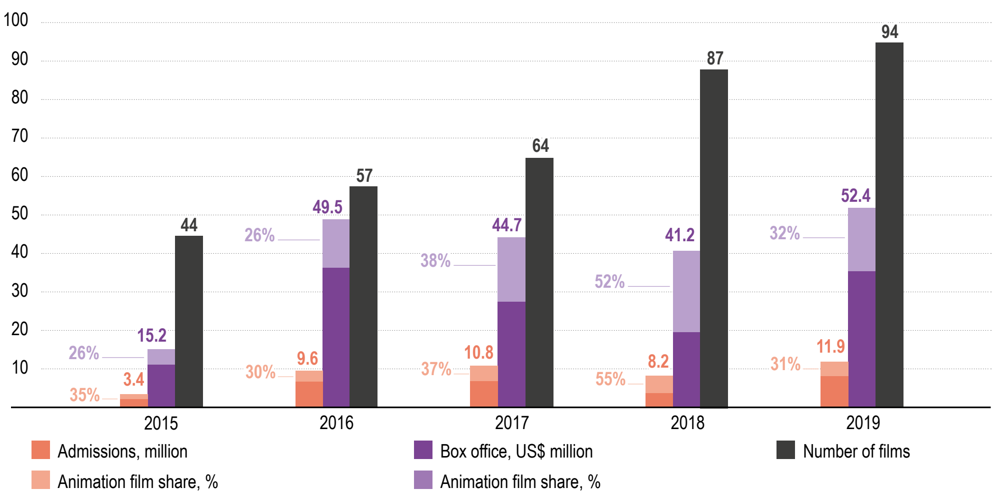
INTERNATIONAL DISTRIBUTION

> Over the past five years, the number of countries importing Russian audiovisual content has increased fivefold (from 23 to 120 countries, including all distribution channels), and the international box office of Russian titles has increased by 3.5 times.

In 2019, 94 Russian titles were distributed abroad. International admissions for Russian titles was 11.9 million, with the box office exceeding USD 50 million (USD 52.4 million). These are currently the best results that Russian titles have achieved in the international box office in the current climate of promoting national content.

Main indicators of the international distribution of Russian films, 2015-2019



Sources: ComScore, Booker's Bulletin

In 2019, the rating of the highest-grossing Russian titles on the international box office was topped by the sports drama ***Going Vertical*** directed by A. Megerdichev (Three T Production of Nikita Mikhalkov). The film was released in China on 13 June 2019. A total of 3 million admissions were recorded in foreign countries in 2019, and the box office grossed USD 14.3 million (in addition to China, the film was also distributed in South Korea). The animated film ***The Snow Queen: Mirrorlands*** (USD 7.8 million, 1.7 million admissions, 30 countries) ranks second. In total, four titles of The Snow Queen franchise produced by the Wizart Animation Studio totalled to 9.4 million admissions outside Russia, the box office grossed USD 46.7 million.

The third position is taken by ***The Big Trip*** (Licensing Brands, LLC), which grossed USD 3.9 million (931 thousand admissions) in international box office. The film also topped the international distribution rating in 2019: it was released in 43 countries.

Animated films account for at least 30% of international admissions for Russian titles each year (31.3% in 2019).

As for feature films, ***Leto*** by K. Serebrennikov was released in the highest number of countries (23 countries, USD 0.8 million). In 2019, the horror film ***The Mermaid: Lake of the Dead*** directed by S. Podgaevskiy (KIT Film Studio) managed to peak at 1 million international admissions. The title was released in 11 countries, with a box office of USD 2.8 million, the bulk of which was grossed in Mexico, Brazil and Colombia.

For five of Russia's top-10 highest-grossing titles, the international box office results proved to be higher than the Russian box office (in particular, for animated films and horror films).

Top-10 highest-grossing Russian titles in international distribution in 2019

No.	Film title	For 2019			For the entire period		Share of international box office	Share of box office in Russia
		Number of countries	Box office, USD million	Admissions, mln	International box office, USD million	Box office in Russia, USD million		
1	Going Vertical	2	14.4	3.096	15.0	51.4	22.6%	77.4%
2	The Snow Queen: Mirrorlands	30	7.8	1.720	8.4	2.7	75.9%	24.1%
3	The Big Trip	43	3.9	0.931	4.5	2.3	66.3%	33.7%
4	The Mermaid: Lake of the Dead	11	2.8	1.035	4.2	1.6	72.5%	27.5%
5	The Iron Mask	4	2.6	0.553	3.3	5.2	38.9%	61.1%
6	Queen of Spades: Through the Looking Glass	18	1.8	0.627	2.0	1.3	59.8%	40.2%
7	T-34	11	1.3	0.125	1.3	33.2	3.8%	96.2%
8	How I Became Russian	4	1.3	0.253	1.3	1.8	41.5%	58.5%
9	Masha and the Bear	9	1.3	0.332	11.4	0.0	99.7%	0.3%
10	Sheep and Wolves: Pig Deal	20	1.2	0.244	1.2	1.6	42.5%	57.5%

Sources: RCFA, ComScore, Box Office Mojo, Booker's Bulletin

Every year, more than 40% of the international box office and admissions of Russian titles comes from distribution in China; in 2019 it amounted to 42.3% of box office (USD 22.2 million) and 40.3% of admissions (4.8 million admissions). Ten Russian titles were distributed in China.

Mexico ranked second for the box office in 2019: eight Russian titles grossed USD 2.8 million (5.4%). South Korea ranked third, with USD 2.7 million (5.1%). 14 Russian titles were distributed in Turkey with a box office of USD 2.0 million, 30% of which was grossed by the animated series ***Masha and the Bear***. The last of the top-5 highest-grossing countries is Germany, where 24 Russian titles were distributed with a box office of USD 1.7 million, 15% of which was grossed by the war film ***T-34***.

Top-5 countries for the Russian titles box office in 2019

No.	Country	Box office percentage	Box office, USD million	Admissions, million	Number of titles	Top title
1	China	42.3%	22.2	4.779	10	Going Vertical
2	Mexico	5.4%	2.8	1.179	8	The Mermaid: Lake of the Dead
3	South Korea	5.1%	2.7	0.413	9	The Snow Queen: Mirrorlands
4	Turkey	3.8%	2.0	0.757	14	Masha and the Bear
5	Germany	3.3%	1.7	0.163	24	T-34
Total top-5 countries in 2019		**59.9%**	**31.4**	**7.292**		

Sources: RCFA, ComScore, Box Office Mojo, Booker's Bulletin

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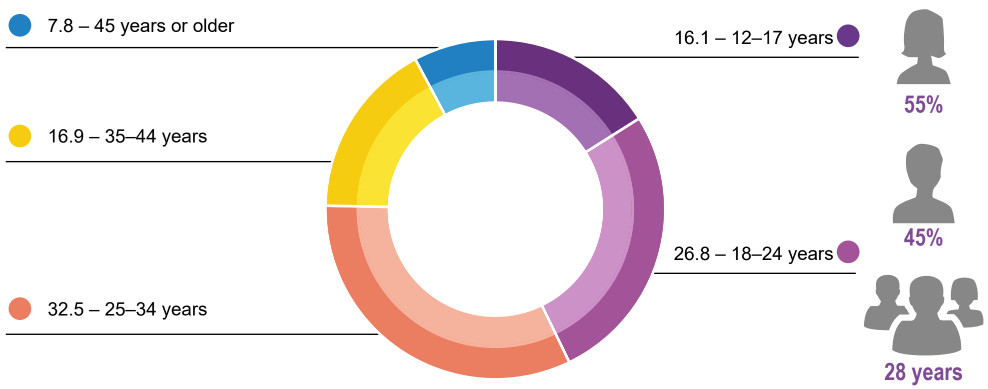
FILM AUDIENCE

> The average age of the moviegoer is 28, most frequent attendees are 18 years of age. Meanwhile, the largest group of moviegoers is 25-34 years old (every third admission).

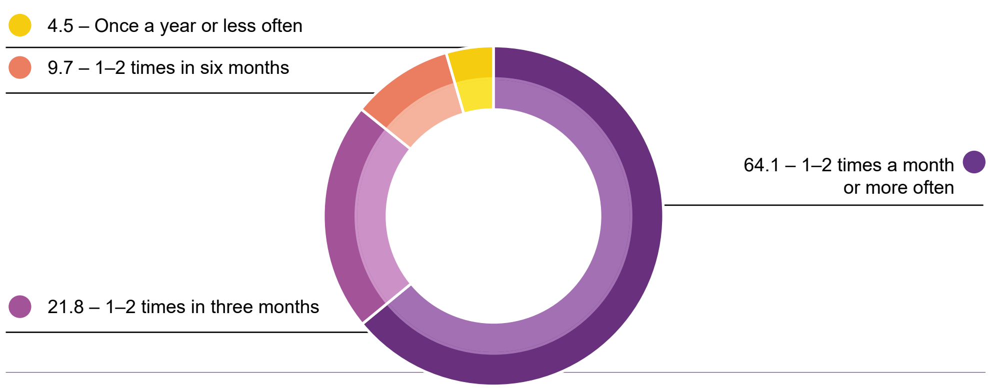
The film audience in the Russian Federation is predominantly female (55% are women). The average admission age is 28, most frequent attendees are 18 years of age.

In terms of age groups, the percentage of the audience aged 12–17 is 16.1%. The percentage of the audience aged 18–24 years is 26.8%. Admissions in this age group form the core of the film audience, that is, they visit the cinema more often than others (69% visit the cinema 1–2 times a month or more). The largest admission group is aged 25–34 years (32.5% of the admissions, every third moviegoer). People aged 35–44 make up 16.9%, and the percentage of 45-year olds and above is 7.8%.

Cinema audience by age, %



Cinema attendance, %



Source: Cinema Fund, "The Moviegoer"

Viewer composition by age group

	Total	aged 12–17	aged 18–24	aged 25–34	aged 35–44	aged 45+
Couple	**27.7%**	9.2%	31.7%	37.8%	22.0%	21.9%
Friends	**30.8%**	59.7%	42.0%	22.7%	9.8%	10.3%
Family	**25.0%**	22.2%	8.6%	20.0%	53.3%	49.1%
Alone	**15.3%**	8.1%	16.4%	18.2%	13.8%	17.4%
Other	**1.2%**	0.8%	1.3%	1.3%	1.1%	1.3%

Source: Cinema Fund

Moviegoers visit cinemas mostly with friends (30.8%). This is the main viewer composition in the Under-25 audience. Another 27.7% of the audience visit the cinema with another person, 15.3% of the cinema audience come to watch a film alone. The family composition is predominant for the 35–44-year-old audience.

The share of the family audience is 25%, and depending on the weekend varies from 22% to 39% during public holidays, weekends and school holidays (the percentage of the family audience can reach 48% during the New Year holidays).

The average age of a child visiting the cinema with parents was 8 years. The minimum age when children start visiting the cinema with their parents is 5 years. Almost half of the family audience (48.5%) attended a film with a child of primary school age (7–11 years old), 30.4% of the family audience with children under 7 years old, and 21.1% with 12–14-year-old teenagers.

Age groups of children visiting the cinema with their parents

	Total
Preschool age (under 7)	**30.4%**
Primary school age (7–11)	**48.5%**
Teenagers (12–14)	**21.1%**

Average age of children visiting the cinema with their parents: **8 years**
Minimum age: **5 years**

Source: Cinema Fund, "The Moviegoer"

In 2019, the audience of Russian titles was on average 5 years older than that of foreign titles: 32 and 27 years, respectively. The percentage of attendees aged 18–24 in the audience of Russian titles did not exceed 20% (28% of the audience of foreign titles); the percentage of viewers older than 35 and above is 38%, 17% of which are over 45 (22% of the audience of foreign titles, no more than 6% of which are over 45). The audience of Russian titles is also distinguished by a higher proportion of women (59% vs. 54%), and a slightly lower frequency of visits than the audience of foreign titles.

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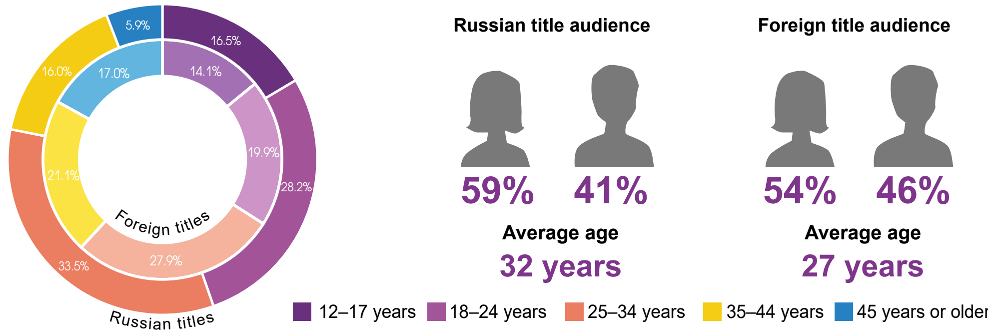
2019 Russian and Foreign Titles Audience Profile



Cinema attendance	1–2 times a month or more often	1–2 times in three months	1–2 times in six months	Once a year or less often
Russian titles	63%↓	21%↓	11%↑	6%↑
Foreign titles	64%	22%	9%	4%

The average level of moviegoer satisfaction and willingness to recommend a Russian title in distribution in 2019 was 17 points: 46.7% of moviegoers expressed their willingness to recommend a film to their friends after watching it, 30.0% would not recommend it, and 23.3% were neutral. The level of satisfaction and willingness to recommend a foreign title was 21 points: 48.1% of moviegoers would recommend the title, 26.7% would not recommend it, and 25.2% were neutral.

Average value of viewer satisfaction index and willingness to recommend a title, 2019

	NPS, points	Would recommend	Would not recommend	Neutral
Average	**21**	47.9%	27.3%	24.8%
Russian titles	**17**	46.7%	30.0%	23.3%
Foreign titles	**21**	48.1%	26.7%	25.2%

NPS is an index for assessing the level of satisfaction with a film and willingness to recommend it. Index range: –100 to 100. The index value is calculated as the difference between the percentage of film goers willing to recommend the film and the percentage of film goers not willing to recommend it.

Among Russian titles in distribution in 2019, the highest level of satisfaction and willingness to recommend was registered for the war film T-34: 65 points, 75% of viewers were willing to recommend the film to their friends after watching it, 10% would not recommend it. Among foreign titles, the top-performing was the drama Green Book: 70 points, 77% would recommend the film and only 6% would not recommend it.

MOVIE GOER

The data source for the analysis is the cinema audience tracker "The Moviegoer", which is a Cinema Fund project designed to provide cinema industry stakeholders with access to up-to-date data on the age and gender composition of moviegoers at the end of each weekend, their level of satisfaction with the title they have watched, and the reasons for their choice. The project team weekly surveys admission composition in the cinemas located in Russia: in Moscow, St. Petersburg, Yekaterinburg, Novosibirsk and Krasnodar, the cities with the highest admission rates. The project's partners providing platforms for the survey were the "Formula Kino/Cinema Park" united cinema chain and the "KARO" cinema chain. Only the actual cinema audience takes part in the polls, that is, viewers leaving cinema halls after watching films. Sample size: 1500 moviegoers over the weekend.

FILM EXHIBITION

> The level of digital exhibition services accessibility for the population has increased from 60.2% to 70.0% (from 88.0 million to 102.9 million people) compared to 2015.

As of the end of 2019, there were 2,096 cinemas and 5,597 screens operating in the Russian Federation. Cinema chain showed growth rate of +9.9% by number of cinemas and +4.8% by number of screens as compared to 2018. 10.5 million screenings were held, the average ticket cost amounted to RUB 252.8.

Digital cinemas in Russia, 2019

	Sites	Screens
Operating in 2019	2 150 +9.0%*	5 739 +4.5%
Operating as of 31 December 2019	2 096 +9.9%	5 597 +4.8%

Source: RCFA
** Change in the number of cinemas compared to the previous year.*

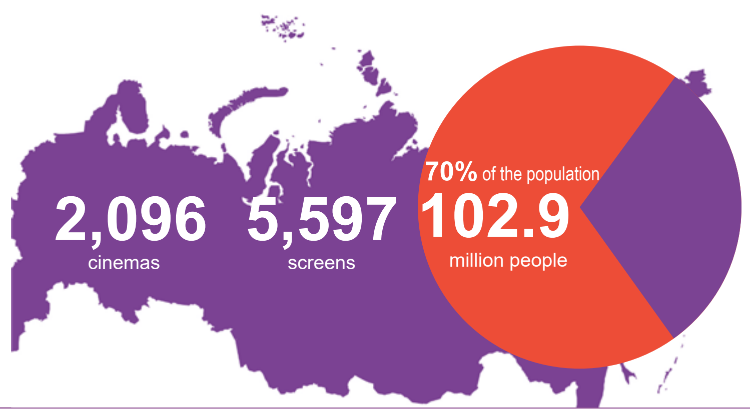
The cinema density per 100,000 people averaged 3.8 screens. A total of 102.9 million people (70% of the population of the Russian Federation) had access to advanced digital cinema services.

Dynamics of advanced cinema services availability to the population, 2015–2019

	2015	2016	2017	2018	2019
Number of screens per 100,000 people	2.7	3.1	3.4	3.6	3.8
Level of availability of cinema services	60.2%	63.0%	66.0%	68.5%	70.0%
Population with access to cinema services, millions	88.0	93.2	97.0	100.6	102.9

As compared to 2015, the cinema chain has grown 76.3% by the number of cinemas and 39.8% by the number of screens.

AVAILABILITY OF DIGITAL CINEMA SERVICES*



** As of 31 December 2019.*

Since 2015, the main driving force behind the growth of the Russian cinema network has been the Russian federal programme on renovating screens in areas with population of up to 500,000.

By the end of 2019, under the renovation programme, 992 screens had been opened in 80 regions of the country. Over the course of five years, RUB 4.89 billion of federal budget subsidies were spent on their retrofitting. Although the opening of these screens was gradual, they have already recorded more than 27 million admissions, with 12.3 million for Russian titles. The total box office from their ticket sales has already exceeded government programme expenses and amounted to RUB 5.01 billion, of which RUB 2.16 billion were grossed by Russian titles. Therefore, this programme has not only increased the level of digital cinema service accessibility to the public, but has also expanded the general national distribution market (by 5% in terms of admissions and by 3.6% in terms of box office in 2019), thus providing grounds for additional annual revenues for content right holders of up to RUB 1 billion per year.

By the end of 2018, 1907 digital cinemas were operating in the country, and by the end of 2019, this number has reached 2096. During the year, 230 cinemas opened, 53 cinemas closed, 12 cinemas recommenced their exhibitions, and 80 cinemas changed the number of their screens. A positive trend in the number of cinemas was observed among 3–4-screen cinemas, 5–6-screen cinemas, and 9–11-screen cinemas against 2018: +3.1%, +6.9%, and +2.8% respectively. In contrast, the number of two-screen cinemas decreased by 3.4%, from 298 to 288.

A quarter of total admissions and box office in 2019 accounted for 145 cinemas with 7–8 screens. On average, 24 viewers attended a film at a cinema of this category, paying an average of RUB 253.9 per ticket.

Structure of the digital cinema market by number of screens, 2019

Number of screens	Number of sites	Admissions, million	Share of admissions	Box office, RUB bln	Box office percentage	Number of screenings, million	Admissions per screening, persons	Box office per screening, RUB	Average ticket price, RUB
1	1,175	19.2	8.7%	3.722	6.7%	1.3	15	2,830.0	194.0
2	288	19.1	8.7%	4.304	7.8%	1.1	18	4,053.7	224.8
3–4	266	34.9	15.9%	8.604	15.5%	1.8	19	4,720.2	246.8
5–6	187	47.5	21.7%	11.491	20.7%	2.2	22	5,306.6	241.7
7–8	145	55.9	25.5%	14.182	25.6%	2.3	24	6,061.4	253.9
9–11	73	32.3	14.7%	9.272	16.7%	1.4	23	6,689.7	287.4
12–24	16	10.6	4.8%	3.891	7.0%	0.4	24	8,818.8	368.0
Total	**2 150**	**219.4**	**100%**	**55.467**	**100%**	**10.5**	**21**	**5,266.4**	**252.8**

Digital cinemas and screens that operated in 2019 were taken into account.

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The average of 21 admissions was recorded per screening in 2019, with average ticket price of RUB 252.8; the average box office per screening amounted to RUB 5,300. The country's Top-10 cinemas showed the average admission of 36 viewers and RUB 11,000 box office per screening.

The Kinocenter Solovey na Krasnoi Presne cinema (Moscow) became the largest cinema by number of admissions, as in the previous year. On December 2, 2019, the most visited cinema in the country was closed down, and the building is to be demolished and replaced by a hotel complex.

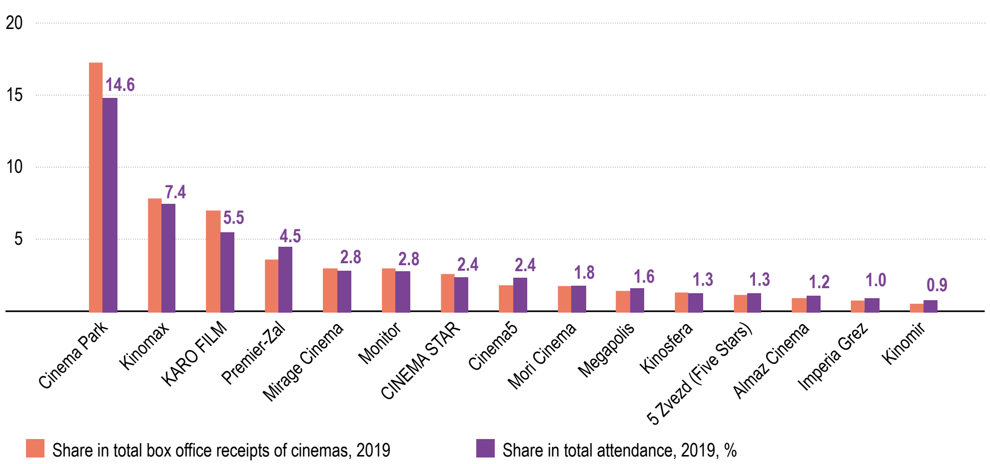
Among ten largest cinemas in terms of admissions over the year, four are located in Moscow, three in Krasnodar, and one each in St. Petersburg, Yekaterinburg and Rostov-on-Don.

Top-5 cinemas by attendance, 2019

No.	City	Cinema chain	Cinema	Number of halls	Share of admissions in the Russian Federation	Admissions per screening, persons	Box office receipts per screening, RUB	Box office receipts per screen, USD
1	Moscow		Solovey Film Centre, Krasnaya Presnya	24	0.67%	32	8,982	138.2
2	Moscow	KARO FILM	KARO FILM at Aviapark Mall	17	0.50%	30	13,283	205.0
3	Krasnodar	Monitor	Monitor SBS	11	0.46%	38	12,218	188.0
4	Krasnodar	Kinomax	Kinomax	8	0.45%	55	16,260	250.1
5	Saint Petersburg		PIK	8	0.45%	46	9,089	140.1
Total Top-5:				**68**	**2.53%**	**37**	**11,506**	

Half of the total admissions (51.5%) comes from 15 cinema chains, which together account for 31% of the country's cinemas and 44% of its screens.

Ratio of major cinema chain box office and admission shares, 2019



FILM PRODUCTION

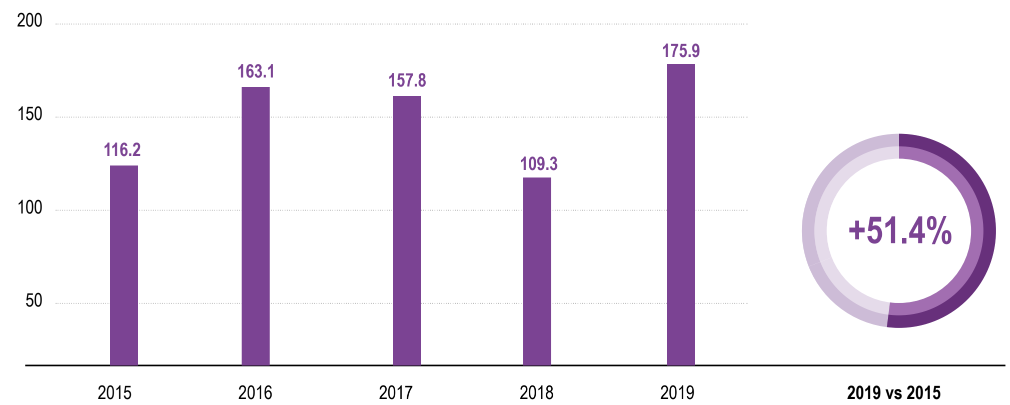
> Over the past five years, the average production budget of Russian full-length titles has increased by one and a half times: from RUB 116.2 million in 2015 to RUB 175.9 million in 2019.

In 2019, 177 Russian titles (137 feature films, 9 animated films, 26 documentaries, and 5 almanacs) were distributed, produced by 157 film companies.

Among the 2019 releases, 26 were regionally produced (21 in 2018). The leader in terms of the number of titles released in the regions is Yakutia (7 titles were released in 2019, and 5 in 2018), with Buryatia in second position (three releases each in 2018 and 2019).

Over the past five years, the average production budget of the Russian full-length titles has increased by one and a half times: from RUB 116.2 million in 2015 to RUB 175.9 million in 2019. Moreover, while in 2013–2015, this figure was at a relatively stable level of RUB 110–115 million, since 2016, the average production budget of the title released in distribution increased by 1.5 times – up to RUB 163 million. This growth is due to a sharp decline in the parity purchasing power of the national currency that occurred in late 2014. Given an average three-year production cycle, film companies that have launched film projects since late 2014 have been subject to high volatility in the foreign exchange market, which has affected the growth of production budgets. The exception to the overall trend is 2018: the average production budget for titles released during this period was RUB 109.3 million, 31% lower than in the previous year. This decrease was due to the release of a film series (which is a part of the series ***Gogol***, the full-length version of ***Politseyskiy s Rublyovki. Novogodniy Bespredel***) and several debut films with a cost of production that is lower than a cinematic quality film.

Average production budget of a Russian full-length film, 2015–2019, RUB million



The ratio of the average and median budgets of feature films to those of animated films demonstrates the characteristics of animated production: the average production cost of a full-length animated film is significantly higher than that of a feature film, is more sensitive to currency fluctuations, and shows the minimum difference between the median and average values. The cost of producing an animated film increased by 60%: from 189.8 million in 2016 to 303.9 million in 2019.

Average and median production budget for feature films and animated full-length films, 2016–2019

	Feature films						Animated films					
	2015	2016	2017	2018	2019	2019 vs 2015	2015	2016	2017	2018	2019	2019 vs 2015
Average production budget, RUB million	106.7	157.8	154.6	111.5	164.1	+54%	184.6	189.8	192.0	187.8	303.9	+65%
Median production budget, RUB million	69.6	85.2	80	89	77.5	+11%	138.3	177.1	175.0	153.1	300.0	+117%

In 2019, 78 films were released with partial financial support from the state. The box office for these titles was RUB 11.2 billion, with a total RUB 4.8 billion of support. The share of non-refundable support in the total production budget of these titles decreased to 28.8% (including funds allocated on a 100% refundable basis – to 36.2%). On average, over five years, the share of non-refundable state support was 37.0% of the total production budget (including funds allocated on a 100% refundable basis – 45.7%).

	2015	2016	2017	2018	2019	Total for 5 years
Titles	81	82	71	63	78	375
Average production budget, RUB million	94.7	126.5	133.8	111.4	171.6	127.8
Box office, rub billion	6.022	8.537	13.667	8.021	11.242	47.489
Support, RUB billion	3.488	5.523	4.491	3.571	4.840	21.913
Share of production budget	45.5%	53.3%	47.3%	50.9%	36.2%	45.7%
including the share of non-refundable support	39.8%	41.2%	38.8%	40.9%	28.8%	37.0%
Share of refundable support	5.7%	12.0%	8.5%	10.0%	7.3%	8.7%

In 2019, film production in the Russian Federation was provided by 30 film studios having 104 stages, 24 chroma key studios and 5 film sets at their disposal. The largest film studios in Moscow are Amedia (16 stages), My Studio (13 stages and 1 chroma key), Cinema Concern Mosfilm (13 stages, 3 film sets and 1 chroma key), which at the end of 2019 got permission to build a new multifunctional cultural centre, including a civic centre and a new filming stage (the 17th stage will be the largest at Mosfilm: its area will be 2,300 sq. m.), as well as the Maxim Gorky Central Film Studio for Children and Youth (12 stages and 1 chroma key). In St. Petersburg, the major film studios are ORK Film Studio (United Russian Film Studios) (6 stages and 1 chroma key) and Lenfilm (4 stages and 1 chroma key).

Moscow has the largest number of film studios – 15. St. Petersburg has 4 studios, Ufa and Khabarovsk have 2 studios each. Yekaterinburg, Khanty-Mansiysk, Yakutsk, Krasnodar, Kazan and Saratov have one film studio each.

Cinema services are provided by 44 organisations. The largest in terms of the number of services provided are CineLab (Moscow, 11 types of services), VEK Studio (St. Petersburg, 9 types of services) and February Twenty Ninth (Yekaterinburg, 8 types of services). Moscow is the undoubted leader in the number of film service companies and in the number of film studios. The most frequently offered services are computer processing of materials during the post-production stage, as well as rental of filming equipment (cameras, camera equipment, transport).

FILM FESTIVALS AND AWARDS

> Since 2019, the list of international film festivals held annually in the Russian Federation is subject to approval by the Ministry of Culture of the Russian Federation (in 2019, the list included 65 international film festivals).

Every year, approximately 170 various kinds of film festivals are held in the Russian Federation, of which over 110 (65%) are considered as international festivals.

Until the end of 2018, there had been no legal definition of a "film festival" in the Russian Federation, which created many interpretations and ambiguous grounds for obtaining a film distribution certificate.

The legislative regulation of film distribution, which requires a distribution certificate for film distribution and/or exhibition in the Russian Federation, provides an exception for titles from the list of international film festivals held in the Russian Federation by the Russian Ministry of Culture, namely: a film may be screened without a distribution certificate if it is screened "at an international film festival held in the Russian Federation, which is included on the list of film festivals and has a total duration of at least three days and not more than fifteen days, provided that such a film is screened no more than five times at a given film festival, and in the event that the film festival is held more than once a year, its total duration shall not exceed fifteen days, and each event shall not last less than three consecutive days and the total number of screenings of such a film at all events of the festival shall not exceed five times".

In 2019, 53 film festivals were supported by the state, with a total of RUB 355.8 million (in 2018 – RUB 362.9 million, in 2017 – RUB 353.4 million).

The main festival venue of the country is traditionally the Moscow International Film Festival (MIFF). The Open Russian Film Festival Kinotavr is the runner-up (including in terms of state support), and the Open Russian Festival of Animated Film is third.

36 Russian titles were presented in the competitive programmes of the 41st Moscow International Film Festival. As part of the main competition, the jury appraised 13 titles from different countries, including 3 titles produced in Russia: ***Sunday*** (directed by Svetlana Proskurina), ***Vongozero***. ***The Outbreak*** (directed by Pavel Kostomarov) and ***The Sun Above Me Never Sets*** (directed by Lubov Borisova). One of the titles competing for awards was co-produced in Russia, Bangladesh and Germany – ***Saturday Afternoon*** (directed by Mostofa Sarwar Farooki).

15 titles competed for the main prize of the 30th Kinotavr, including debuts. The Grand Prix of the festival was awarded to ***Byk***, Boris Akopov's debut film. Best Director was awarded to Aleksandr Lungin (***Bolshaya poeziya***), and the comedy ***Let's Get Divorced*** was selected as Best Debut (directed by Anna Parmas). Victoria Tolstoganova won the award for Best Actress for her performance in ***Above The Sky***, Alexander Kuznetsov won Best Actor in ***Bolshaya Poeziya***. Gleb Filatov was awarded for Best Cinematography for his film ***Byk***. Best Screenplay award went to Anna Parmas, Maria Shulgina and Elizabeth Tikhonova for ***Let's Get Divorced***. 26 films took part in the short film competition, ***Fuel*** by Mikhail Arkhipov was awarded Best Short Film.

The winner of the Golden Eagle Award 2019 in the Best Feature Film category was ***Text*** by Klim Shipenko. ***Byk*** by Boris Akopov, ***Beanpole*** by Kantemir Balagov, ***Odessa*** by Valery Todorovsky, and ***T-34*** by Alexey Sidorov, who won the Best Director, also competed in the category.

> The Grand Prix of the Kinotavr Film Festival 2019 was awarded to ***Byk***, debut film by Boris Akopov. The winner of the Golden Eagle Award 2019 in the Best Feature Film category was ***Text*** by Klim Shipenko. The White Elephant Award in the Best Feature Film category went to ***Beanpole*** directed by Kantemir Balagov.

Best Animated Film was awarded to ***He Can't Live Without Space*** directed by Konstantin Bronzit, Best Non-fiction Film – ***Without Statute of Limitations***. ***Opening the Closet*** of Shame by Aleksandr Zvyagintsev, Best Short Film – ***The Interview*** directed by Ivan Sosnin.

Best Miniseries or Television Film was awarded to Alexey Andrianov's series ***Godunov***. Sergey Ursulyak's series ***Nenastye*** won in the Best Television Series category.

CF CINEMA FUND

> In 2019, four Russian titles: drama ***Byk***, ***Beanpole***, ***Bratstvo*** and ***Leave of Absence*** short-length film won five awards at Class A international film festivals.

In 2019, four Russian titles: drama ***Byk***, ***Beanpole***, ***Bratstvo*** and ***Leave of Absence*** short-length film won five awards at Class A international film festivals. In addition, director Andrei Konchalovsky was presented with Lifetime Achievement Award at the Tallinn Black Nights Film Festival for his outstanding contribution to cinema.

Russian award winners at Class A international film festivals, 2019

Festival	Award	Title	Received by
72nd Cannes International Film Festival	Un Certain Regard prize for Best Director	Beanpole	Director Kantemir Balagov
	FIPRESCI prize		
22nd Shanghai International Film Festival	Best Script	Bratstvo	Director Pavel Lungin
72nd Locarno International Film Festival	Award for Best Director of a Short Film	Leave of Absence	Director Anton Sazonov
54th Karlovy Vary International Film Festival	Best film of the competition program "From West to East"	Byk	Director Boris Akopov
23rd Tallinn Black Nights Film Festival	Lifetime Achievement Award		Director Andrei Konchalovsky

In total, from 2013 to 2019, Russian cinematography won 67 awards at Class A film festivals.

FILM EDUCATION

> Three Russian educational institutions have worldwide recognition as members of the International Association of Film and Television Schools at UNESCO (CILECT): Gerasimov Institute of Cinematography (VGIK), St. Petersburg State University of Film and Television (SPUFT) and GITR Film and Television School.

The basic educational institution of the Russian Federation providing training in the field of cinema is the Russian State University of Cinematography named after S.A. Gerasimov (VGIK). In 2019, the leading university in the field of cinematography celebrated its 100th anniversary. The University trains specialists in higher, secondary and further education programmes. The University has seven faculties, three branches (in Irkutsk, Rostov-on-Don and Sergiev Posad), 20 laboratories, Higher Film and Television Courses, Cinema, Television and Multimedia College, as well as Cinema Art Research Institute.

VGIK provides training at the following faculties: Directing, Acting, Cinematography, Animation and Multimedia, Art, Scriptwriting and Film Studies, Production and Economics. In 2019, 263 specialists graduated from higher education programmes, of whom 80 (including 27 specialising in feature films, 9 in non-fiction films, and 12 in animation and computer graphics) graduated from the Faculty of Directing and 31 from the Faculty of Animation and Multimedia. The Faculty of Scriptwriting and Film Studies has 48 graduates, Faculty of Cinematography – 30, Faculty of Production – 33. The Faculty of Acting has 21 graduates, Faculty of Art – 20 graduates. 278 young people who studied at VGIK branches and colleges received secondary vocational education.

The St. Petersburg State University of Film and Television is the second most significant university in terms of academic status and number of specialised faculties, providing training in programs of secondary vocational education, higher education and further vocational education. In 2019 the University included three faculties (Screen Arts, Television, Design and Photography, Vocational Education), 17 departments, laboratories; Educational Video Centre; Interdepartmental Video Editing, Animation and Voice Acting Training and Production Complex; Film and Video Technical College. The Film and Television Production Department and the Multimedia and Animation Direction Department were transferred to the Faculty of Screen Arts due to the 2019 merger of the Faculty of Multimedia Technology and Photography and the Faculty of Management and Media Communications (the new faculty was named the Faculty of Television, Design and Photography). The Computer Graphics and Design Department has a laboratory of graphic computer technologies, where students learn to create multimedia projects. Established in 2018, the Student Media Centre educational television studio was renamed to Video Art Laboratory. Special attention is paid to further vocational education programmes for second-tier specialists. While in 2018, there were 14 second-tier training programmes, in 2019, their number increased to 19.

In 2019, within the main specialties in the area of cinematography, 14 feature and television films directors, 10 animation and computer graphics directors, 15 sound producers, 6 cinematographers, 37 producers, 8 film critics, and 17 playwrights graduated from SPUFT with higher education diplomas. The University offers a wide range of professional retraining programmes.

Apart from VGIK and SPUFT, specialist training under higher education programs in the field of cinematography is offered by state universities and institutes, including Moscow State Institute of Culture (MGIK) (former MGUKI), Russian State Institute of Performing Arts (RGISI), Omsk F.M. Dostoevsky State University (OmSU), Oryol State Institute of Culture (OGIIK), Krasnodar State Institute of Culture (KGIK), North-Caucasus State Institute of Arts (NCSIA), Kazan State Institute of Culture (KazGIK).

The most popular majors include film and television directing, producing and economics, as well as acting.

Three Russian educational institutions have worldwide recognition as members of the International Association of Film and Television Schools at UNESCO (CILECT): Gerasimov Institute of Cinematography (VGIK), St. Petersburg State University of Film and Television (SPUFT) and GITR Film and Television School. The Association includes 172 specialised educational institutions across the world and provides the following membership benefits: high-scale recognition by the world's educational, scientific and cultural communities, prospects for professional and personal growth for students, teachers and staff members through participation in the Association's arrangements, exchange and joint development of curricula plans and programs, and several other opportunities contributing to the development of film education all over the world.

The largest film schools include Moscow Film School, Industry School of Film and Television, opened in autumn 2017, as well as the Advanced Course for Screenwriters and Film Directors, which is the oldest post-graduate educational institution in Russia training specialists in the main film professions: screenwriters, directors of feature and non-fiction films, producers.

In this area of education, main cinematography training programs by both popularity and the number of graduates include film directing, producing, acting and sound design.

The intensity of training and the focus on the practical application of skills and professional communication allow achieving a high level of personnel training in highly specialised disciplines in a very short time (on average, 1 to 2 years), which to a large extent compensates for the shortage of necessary competencies in filmmaking process. Just as important is the high motivation of students who, as a rule, have already acquired higher education and gained a bit of experience in a certain area to fulfil their creative and professional potential through getting further education or training in the field of cinematography.

Education facilities and resources of the majority of film schools and courses enable specialist training consistent with the most relevant requirements for skills needed in today's film production process.

> The Russian Federation has about 40 film schools, specialised courses, and non-government film universities providing training in filmmaking. 28 film schools are located in Moscow, 6 in St. Petersburg, 2 in Yekaterinburg, and Krasnodar and Ufa have 1 school each.

TELEVISION

In the Russian film industry, the participation of the Russian National State Television and Radio Broadcasting Company (VGTRK) and major media companies – Gazprom-Media and National Media Group in the production and promotion of films guarantees audience success to a large extent, while it is often crucial for high-budget major titles. The assets of holdings in all segments of the media market (television, radio, media, film production and distribution, Internet platforms) allow implementing large-scale integrated advertising campaigns, thereby reaching almost any target audience and having a synergistic effect on video content distribution.

Assets of major media holdings

VGTRK holds a leading position in the national broadcasting market and is one of the leading producers of programmes. VGTRK is comprised of federal channels: Russia 1, Russia-K, more than 80 regional television and radio companies broadcasting in all regions of the Russian Federation, Russia 24, a 24-hour information channel, the Russian international channel RTR-Planeta, the Russian version of the Euronews channel, four radio stations (Radio of Russia, Radio Mayak, Kultura, Vesti FM), and the Russia State Internet channel, which brings together dozens of Internet resources. VGTRK also offers in partnership with Rostelecom the first Russian package of non-air channels – Digital TV, which includes 17 TV channels: My Planet, Science 2.0, History, The Living Planet, T24, Mult, Russian Novel, Russian Detective, Russian Bestseller, NST and others.

Gazprom-Media Holding manages nine air television channels (NTV, TNT, TV-3, Friday!, TNT4, Match TV, Match! STRANA, 2x2, Super), film production and distribution (KIT Film Studio, Central Partnership, Comedy Club Production, Good Story Media), and production and distribution of thematic TV channels (Red Media). Gazprom-Media's portfolio also includes 10 radio stations, assets in the Internet segment – Premier Video Service, Ruform (Rutube video hosting and Pladform video content distribution system), and in the printing segment (Seven Days and Media Press publishing houses).

The assets of the National Media Group include five air TV channels (Channel One, REN TV, Channel Five, Channel 78, as well as STS Media, which includes the channels STS, Domashniy, Che, STS Love and STS Kids), four groups of paid TV companies (Media Alliance, Viasat Russia, Media-Telecom, Sony Pictures Television Networks), digital and information resources (Izvestia International Centre, Sport-Express, Metro-Peterburg). The holding's assets in content and film production include Art Pictures Studio, Keystone Production, NMG Studio, Metrafilms Studio, as well as Industry School of Film and Television (partner project of National Media Group, Fyodor Bondarchuk and Vodorod Film Company), Art Pictures Vision, a TV film and TV series production company, Art Pictures Distribution, a company that purchases and monetises the content rights portfolios, Hype Agency, an influencer marketing agency. In the Internet technologies segment, the holding's assets include such resources as Vitrina TV (a single platform for Internet-broadcasting of the federal TV channels content, its founders being National Media Group CJSC, Channel One Russia JSC, Russia National State Television and Radio Broadcasting Company (VGTRK) and STV Media LLC), more.tv – online platform for video content streaming (the service was launched in September 2019), as well as AmberData – an aggregator platform for management of impersonal user data on the Internet.

About 30–40 Russian titles are released every year, supported by TV channels. In 2019, with the support of TV channels, 37 titles were released, with a total box office of RUB 9.5 billion (67% of the total box office of Russian releases of the year). These include both the highest-grossing titles of the year ("The Peasant" (Russia 1, Super), "T-34" (Russia 1), "Soyuz Spaseniya" (Channel One Russia)), and genre films corresponding to the content policy of TV channels.

Top-10 2000–2019 Russian films on TV in 2019

No.	Name	TV channel	Admissions, thousand people	TV rating, %	Share, %	Air date
1	T-34	RUSSIA 1	6610.2	9.4	35.0	09 May
2	Going Vertical	RUSSIA 1	5115.9	7.3	22.8	23 February
3	Tankers	CHANNEL ONE RUSSIA	4714.0	6.7	21.7	18 January
4	Posledniy bogatyr	RUSSIA 1	4489.7	6.4	19.5	01 January
5	Ice	RUSSIA 1	4439.0	6.3	21.6	08 March
6	SuperBobrovy. Narodnye mstiteli	RUSSIA 1	3008.0	4.3	16.3	01 January
7	Ekipazh	RUSSIA 1	2608.2	3.7	24.2	23 February
8	I Am Losing Weight	CHANNEL ONE RUSSIA	2497.0	3.6	17.1	08 March
10	Tanks	CHANNEL ONE RUSSIA	2285.8	3.3	15.4	23 February

Source: Mediascope, TV Index

The war film ***T-34***, which premiered on Victory Day (09 May 2019) on Russia 1, headed the air of 2019: the TV rating was 9.4%, the number of admissions is estimated at 6.6 million viewers.

According to Mediascope, in 2019, 98% of residents of large Russian cities aged 4 years and older turned on their TV at least once a month. 66% of the population turned on their TV every day. At the same time, the average daily TV viewing time dropped to 3 hours 40 minutes a day (in 2017 – 242 minutes a day, in 2018 – 230 minutes, in 2019 – 220 minutes). Average daily viewing time among the audience from 4 to 17 years old was 1 hour 42 minutes, among the audience from 18 to 34 years old – 2 hours 12 minutes. According to the 2019 results, Russia-1 is once again the largest TV channel, with a 12.0% of audience. Apart from Russia-1, the top-5 TV channels include Channel One Russia (10.6%), NTV (9.0%), Channel Five (6.6%), and REN TV (5.3%).

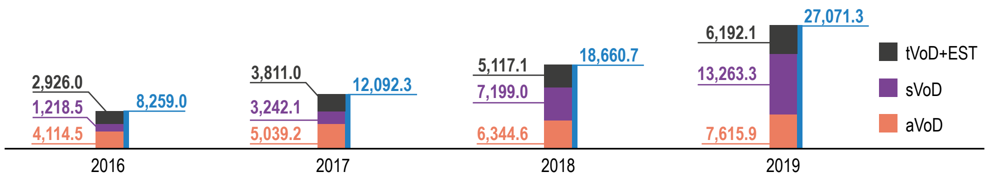
In 2019, the Russian Federation completed the transition to digital television broadcasting, providing access to 20 mandatory public TV channels and three radio channels for the entire population. The Paid TV market has continued to grow. According to TMT Consulting, the growth of Paid TV in Russia in 2019 was 3.3%, the number of subscribers – 45.3 million. The market volume has exceeded the 100 billion mark, having reached RUB 103.9 billion. The influence of limiting factors for the growth of this market is increasing: an increase in the number of subscribers to online platforms, as well as the global trend of decreasing TV viewing time among young audience.

VIDEO SERVICES

According to IAA TelecomDaily, the total volume of the Russian online video services market over the past few years shows a three-fold increase: from RUB 8.3 billion in 2016 to RUB 27.1 billion in 2019. Market growth (+45% compared to 2018) is due to the demand for a paid monetisation model, which was more than 2/3 of total revenue.

Over the past four years, the revenue model of online cinemas has undergone serious changes. Thus, in 2015, the share of profits from the advertising monetisation model reached 58%. In 2019, it declined by more than 2.5 times to 23%, falling behind other content monetisation models – subscription video on demand (sVoD), transactional video on demand (tVoD) and content purchasing (EST). In absolute figures, the profit from the advertising monetisation model (aVoD) also shows an annual increase of 20%. The increase in the paid model is also due to the highest demand among the audience for new film distribution products, usually distributed as per the EST model (purchasing).

Share of various revenue models in total revenue of online video services, million rubles



Source: IAA TelecomDaily

There are several dozens of players on the Russian online video services market. The main segments of the legal video services market are:

- online cinemas – content aggregators, online resources offering online legal professional video content using OTT technology (ivi, Okko, Megogo, etc.);
- TV channels, monetising primarily their online content via paid or advertising model (TNT, STS, Channel One Russia, etc.);
- CSPs, which implemented paid video services on STBs in the form of VoDs or video streaming (Rostelecom, Beeline, MegaFon, etc.);
- digital distribution platforms – video content aggregators providing OTT viewing, apps for mobile platforms and Smart TV (iTunes, GooglePlay, etc.).

Experts include the following market growth drivers:

- growth of the paying audience, stronger habits of online shopping;
- development of payment systems allowing fast and convenient purchase of online content, as well as loyalty programs for mobile operators and banks;
- reduced delay between cinema and online premieres to 8–12 weeks;
- increased Internet penetration;
- increased SmartTV and smartphone penetration;
- online cinemas offering exclusive content (own production, sports, catch-forward model);
- reinvigoration of major Internet companies and media holdings in the market;
- partnerships with leading Russian and Hollywood studios;
- active anti-piracy policy.

The availability of unlicensed video content still has a negative impact on the market. At the same time, according to Group-IB estimates, in 2019, the online piracy market in Russia not only stopped growing for the first time in 5 years, but also showed a decline. Its volume was USD 63.5 million, which is 27% lower compared to 2018. Among the main reasons for the collapse of the online piracy websites' revenue, Group-IB experts name: attack on the advertising monetisation model of online piracy websites, the fall of the "big three" of piracy CDNs (Moonwalk, HDGO and Kodik), which provided content to 90% of unlicensed online cinemas in Russia and the CIS, as well as improvement of the legislative field and anti-piracy memorandum*.

In addition to piracy, barriers to the development of the video services market include low quality content when using the advertising model, the relatively high cost of quality professional content, uneven access to Internet, the speed and quality of which may differ from region to region, as well as the lack of a clear regulatory framework for online video and industrial targeting and monetisation metrics.

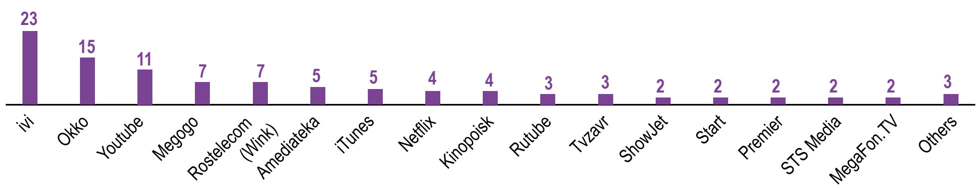
The largest video services in Russia are ivi and Okko, which account for about 40% of the total video services market (according to IAA TelecomDaily, 23% and 15% respectively).

According to the company, ivi's revenue for 2019 was RUB 6.1 billion, excluding VAT (+55% growth). The main cash inflow was provided by the paid model, which now accounts for 76% of total service revenue (against 70% in 2018). In 2019, there were film premieres of projects created with the participation of ivi – "Yumorist", "Trezvyy Voditel", "Robo", and "Dorogoy Papa", which later became available via subscription.

According to the company, the turnover of the Okko online cinema at the end of 2019 increased by 96%, amounting to RUB 4.9 billion including VAT. In April 2019, a deal was made between the owner of Rambler Group Service and Sberbank, which acquired 46.5% of the holding's online business in August, and digital products and services of Rambler were integrated into the ecosystem of the bank. Thanks to media support from the Rambler Group and Sberbank's ecosystem, the service was able to almost double its revenue.

The top-5 online video services include Megogo and Rostelecom's Wink (7% each). Amediatek has 5% of the market. The share of the American video service Netflix was 4%.

Share of online cinemas in total revenue, %



Source: IAA TelecomDaily

As the market develops, the structure of competition is changing from extensive to intensive methods. Building content libraries is less important than understanding the viewer's needs, their preferences for video genres, screens and common viewing circumstances.

Based on international expertise, Russian online cinemas are launching the production of their own content as an effective tool for attracting and retaining users, thus expanding the structure of Russian film production.

** Memorandum – "Concerning Cooperation in the Field of Exclusive Rights Protection in the Digital Era" is the main document that laid the foundation for self-regulation of the industry, signed in 2018 by Russia's leading film and television producers, search engine operators and video hosting owners, and reflecting the consolidation of the position of major market players in the fight against online piracy.*

SUMMARY

KEY FIGURES of the Russian Film Industry, 2015–2019

Film distribution

Top-5 European countries by Cinema Attendance, 2019

Country	Admissions, million 2018 г.	Admissions, million 2019 г.	Dynamics	National market share in 2019
Russia	200.4	219.4	+9.5%	23.1%
France	201.2	213.3	+6.0%	35.0%
Great Britain	177.0	176.1	– 0.5%	48.4%*
Germany	105.4	118.6	+12.6%	21.3%
Italy	91.7	104.7	+14.2%	21.6%

*Including Hollywood co-production.
Source: European Audiovisual Observatory

	Gross box office, USD mln	Gross box office, RUB bln	Annual growth rate by box office, %	Annual growth rate by admissions, %	Admissions, million	Average ticket price, RUB	Total number of releases
2019	853.6	55.5	+10.3	+9,5	219.4	252.8	626
2018	811.8	50.3	– 6.1	– 6,2	200.4	251.0	521
2017	917.0	53.6	+11.0	+11,5	213.5	250.9	472
2016	722.6	48.3	+11.1	+10,3	191.6	252.2	486
2015	705.8	43.5	– 6.0	– 8,9	173.6	250.5	425

Russian titles in distribution

In Russia

	Gross box office, RUB bln	Box office share of Russian titles, %	Admissions, million	Share of admissions Russian titles, %	Total number of releases
2019	12.3	22.1	50.6	23.1	177
2018	13.8	27.5	57.9	28.9	142
2017	13.0	24.3	54.7	25.6	123
2016	8.6	17.8	35.2	18.4	156
2015	7.2	16.6	31.1	17.9	123

Abroad

	Box office, USD million	Number of titles	Admissions, million
2019	52.4	94	11.9
2018	41.2	87	8.2
2017	44.7	64	10.8
2016	49.5	57	9.6
2015	15.2	44	3.4

Top-5 countries for the Russian titles box office in 2019

	Share of box office, %	Box office, USD million
China	42.3	22.2
Mexico	5.4	2.8
South Korea	5.1	2.7
Turkey	3.8	2.0
Germany	3.3	1.7

Film exhibition

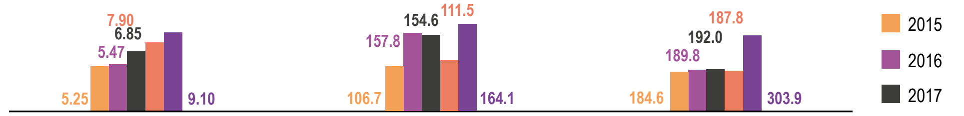
	Number of sites by the end of the year	Number of screens by the end of the year	Number of screenings, million	Screens opened under the modernisation programme*
2019	2,096	5,597	10.5	992
2018	1,907	5,341	10.0	787
2017	1,612	4,930	9.5	426
2016	1,367	4,491	8.6	187
2015	1,189	4,004	7.6	–

** Accumulated total.*

Percentage of population with access to digital cinema services, %

- 2019 – 70 (102.9 million people)
- 2018 – 69 (100.6 million people)
- 2017 – 66 (97.0 million people)
- 2016 – 63 (93.2 million people)
- 2015 – 60 (88.0 million people)

Film production



Scope of state support of film production, RUB billion

Average budget of the Russian feature films, RUB million

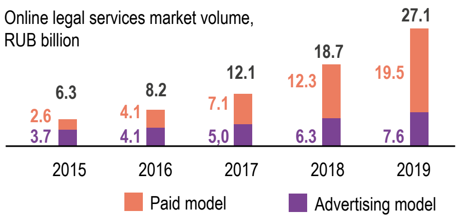
Average budget of animated feature films, RUB million

Film Festivals

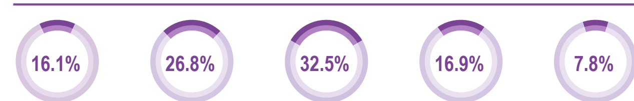
Number of awards won by Russian titles at Class A international film festivals

Video services

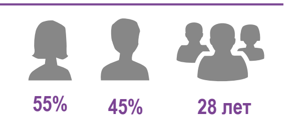
Online legal services market volume, RUB billion



Film audience

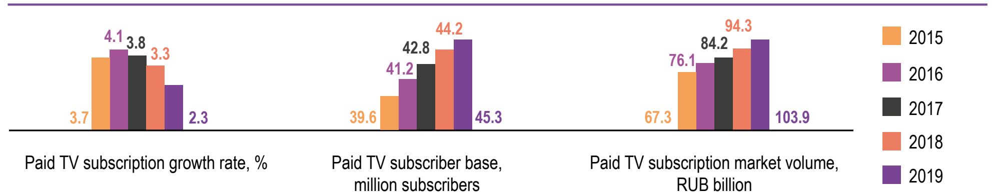


12–17 years | 18–24 years | 25–34 years | 35–44 years | 45 years or older



Share of family audience: 25%
Average age of children: 8 лет

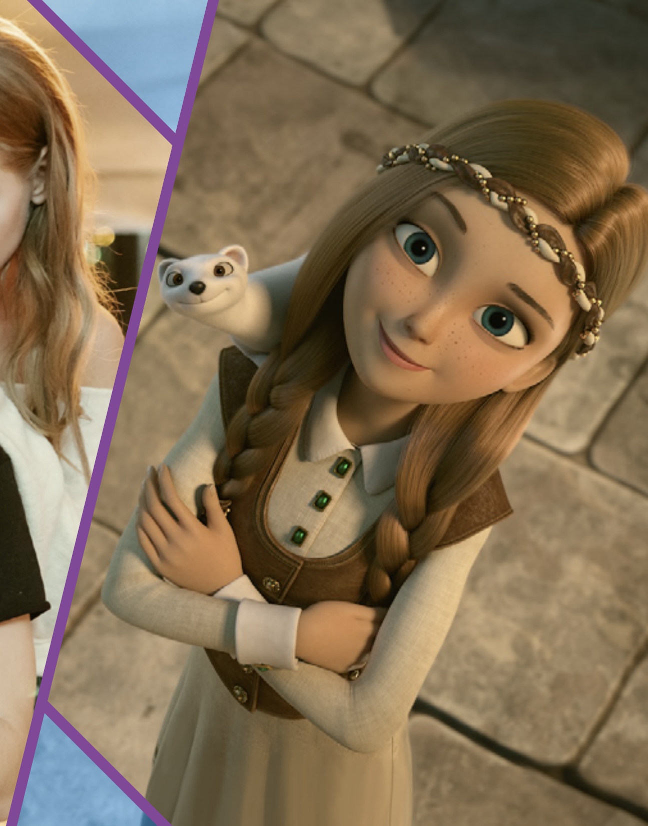
Paid TV



Paid TV subscription growth rate, %

Paid TV subscriber base, million subscribers

Paid TV subscription market volume, RUB billion



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