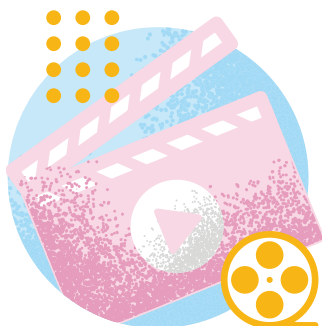


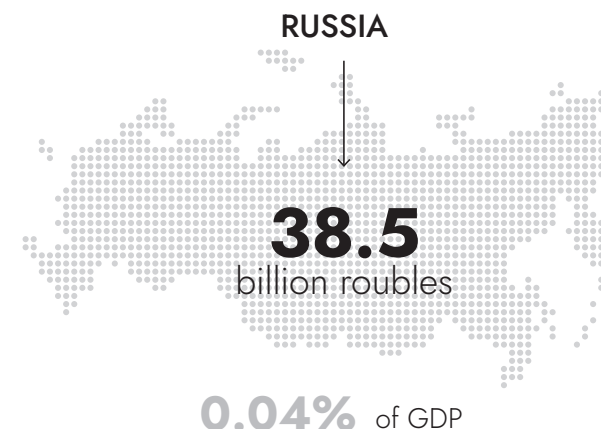
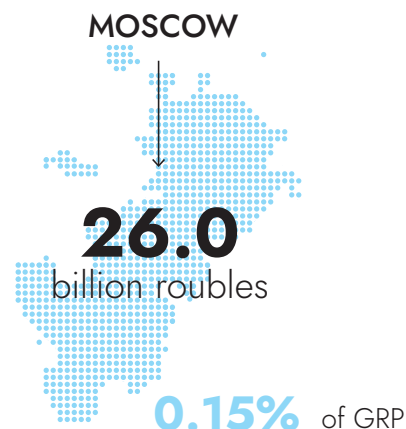
FILM AND ANIMATION



OKVED2 CODES

- 59.11** Production of motion pictures and TV programmes
- 59.12** Post-production of motion pictures and TV programmes
- 59.13** Distribution of motion pictures and TV programmes
- 59.14** Motion picture projection
- 77.22** Renting of video tapes and disks

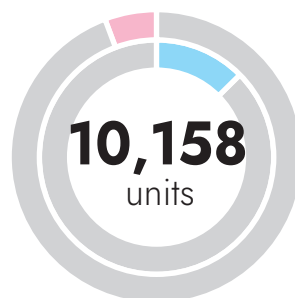
CREATIVE INDUSTRY GVA ESTIMATES



CONTRIBUTION TO MOSCOW'S CREATIVE ECONOMY

ENTERPRISES AND SPs

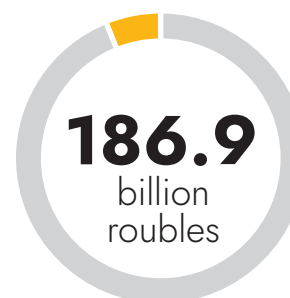
5.7% **12.6%**



Of which enterprises — 3,309,
sole proprietors — 6,849

REVENUE

6.1%



Provided revenue reports for 2018 —
1,521 enterprises (46.0%)

EMPLOYMENT

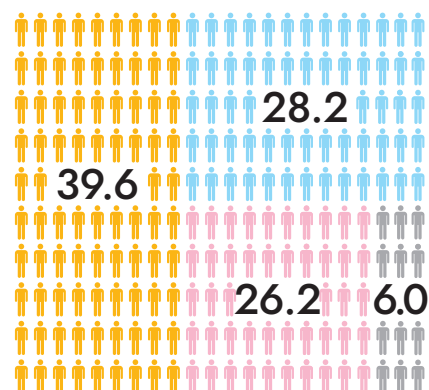
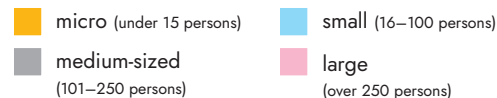
4.7%



Provided employment reports for 2018 —
2,290 enterprises (70.0%)

EMPLOYMENT PERCENTAGE DISTRIBUTION

ENTERPRISES:

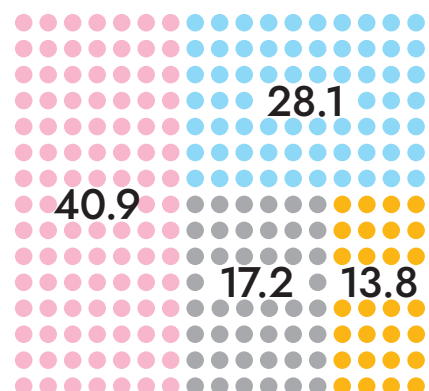
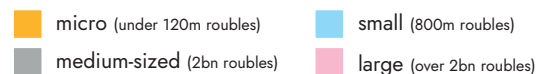


46.4%

are employed in
top 50 enterprises

REVENUE PERCENTAGE DISTRIBUTION

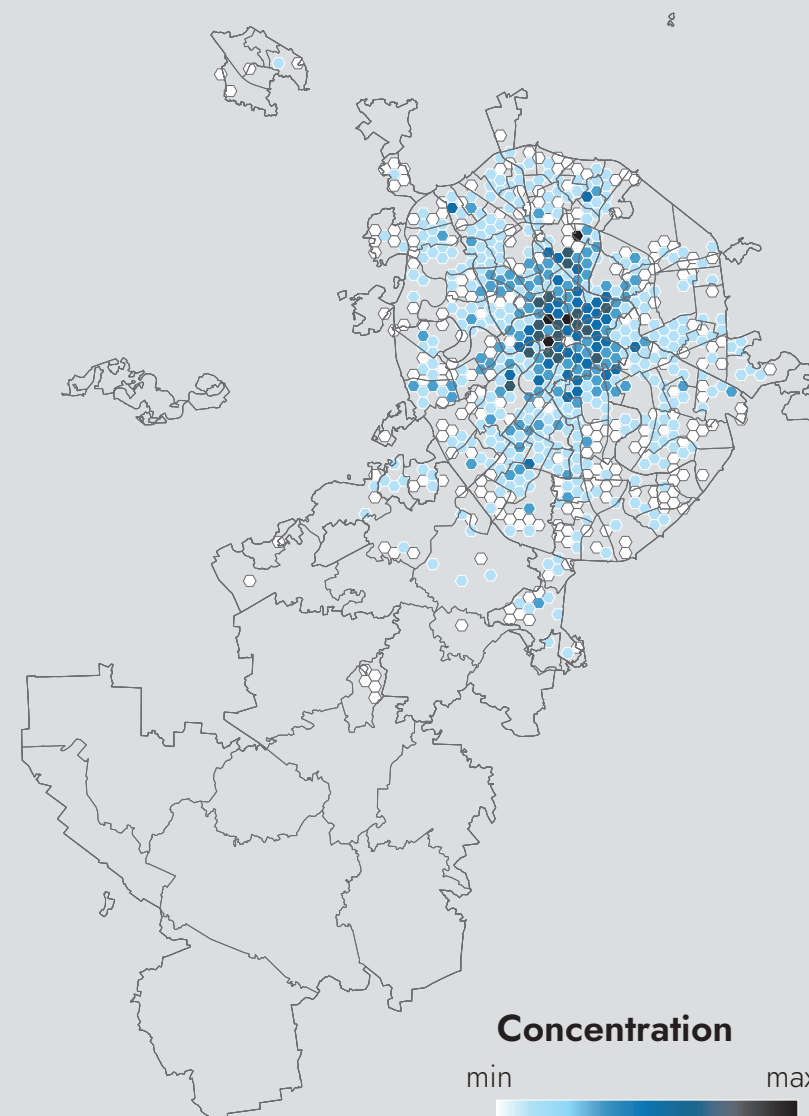
ENTERPRISES:



61.1%

revenue is earned by
top 50 enterprises

FILM AND ANIMATION: LOCALISATION OF ENTERPRISES



AWARDS OF LEADING RUSSIAN FILM COMPANIES FOR THE PRODUCED FILMS: 2015–2019

| Film company | City | Number of nominations | | | | Total |
|---------------------------------------|---------------|-----------------------|--------------|----------|------|-------|
| | | Nika | Golden Eagle | Kinotavr | MIFF | |
| CTB Film Company | St Petersburg | 8 | 7 | 9 | 1 | 25 |
| Non-Stop Production | Moscow | 7 | 9 | 0 | 0 | 16 |
| TriTe Studio | Moscow | 0 | 16 | 0 | 0 | 16 |
| Mosfilm | Moscow | 4 | 7 | 2 | 0 | 13 |
| Mars Media Entertainment | Moscow | 5 | 2 | 4 | 0 | 11 |
| Andrei Konchalovsky Production Center | Moscow | 3 | 4 | 0 | 3 | 10 |
| Art Pictures Studio | Moscow | 1 | 8 | 1 | 0 | 10 |
| Lenfilm | St Petersburg | 7 | 0 | 3 | 0 | 10 |
| Vertical | Moscow | 4 | 5 | 0 | 0 | 9 |
| SAGa Film Company | Moscow | 3 | 3 | 1 | 1 | 8 |
| New People | Moscow | 1 | 3 | 4 | 0 | 8 |

Moscow is a centre of national filming industry. According to the expert community, over 90% of films are made here, and 80% of animation studios are located in the capital. It is also leading among other Russian cities by the number of movie theatres and cinema halls.

Nine companies from Moscow and two from St Petersburg have entered the rating for the number of awards and wins at the largest Russian film festivals. The number of award-winning pictures varies from two ('Vertical' and 'SAGa Film Company') to nine ('CTB Film Company'). 177 films won in at least one nomination, of which 25 were awarded prizes in two and more events.

In 2015–2019, 713 Russian films have been released in Russian cinemas (28% of all released films). By the number of releases among distributors, the leader is 'Mult v kino', which produces collections of premiering animation series of the same name. The highest box office was secured by 'Central Partnership', 'Karoprokat', and 'Walt Disney Studios Sony Pictures Releasing': they hold 65% of the aggregate ticket-selling revenues.

Source: HSE estimates based on KinoPoisk Online Database and data on winners of Nika Award, Golden Eagle Award, Kinotavr Film Festival, and Moscow International Film Festival (MIFF), 2015–2019.

DISTRIBUTION OF RUSSIAN FILMS IN RUSSIA: 2015–2019

713
films

61.1 billion
roubles
box office*

LARGEST DISTRIBUTION COMPANIES

| Company | Number of films |
|--|-----------------|
| Mult v kino | 111 |
| Central Partnership | 71 |
| Karoprokat | 64 |
| Nashe Kino | 44 |
| Samokat | 42 |
| Walt Disney Studios Sony Pictures Releasing | 41 |
| Fox | 32 |
| Paradise | 32 |

BOX OFFICE LEADERS

KHOLOP

2019, comedy
KinoPoisk rating



Box office,
billion roubles

3.07



Number of viewers,
million persons

11.62

DVIZHENIE VVERKH

2017, drama, sport
KinoPoisk rating



2.97



12.01

T-34

2019, adventure, war
KinoPoisk rating



2.27



8.84

POLITSEYSKIY S RUBLYOVKI.
NOVOGODNIY BESPREDEL

2018, comedy
KinoPoisk rating



1.69



6.33

POSLEDNIY BOGATYR

2017, comedy, family
KinoPoisk rating



1.67































































7.40

* In Russia and CIS.

Source: HSE estimates based on the data of the Film Distributor Bulletin and KinoPoisk Online Database (as of August 2020).

MOST POPULAR RUSSIAN-LANGUAGE YOUTUBE CHANNELS OF RUSSIAN ANIMATION SERIES: 2020

| Number of subscribers, million persons | Number of views, billion | Number of videos | Russian name of channel | English name of channel | Number of videos | Number of views, million | Number of subscribers, thousand persons |
|---|---|--|---|--|---|---|--|
|  31.2 |  25.4 | 841  | MASHA I MEDVED 2011  Animaccord  | MASHA AND THE BEAR 2014  Moscow  |  582 |  8,367.7 |  18,400 |
|  6.2 |  5.7 | 843  | FIKSIKI 2011  Aeroplan Studio  | THE FIXIES 2014  Moscow  |  883 |  767.4 |  705 |
|  6.0 |  9.4 | 1,024  | LUNTIK 2007  Melnitsa Animation  | MOONZY 2014  St Petersburg  |  86 |  13.6 |  65 |
|  5.9 |  6.2 | 794  | BARBOSKINY 2011  Melnitsa Animation  | THE BARKERS 2014  St Petersburg  |  85 |  44.7 |  114 |
|  4.2 |  3.1 | 545  | TRI KOTA 2015  Metrafilms  | KID-E-CATS 2018  Moscow  |  201 |  77.1 |  106 |
|  2.9 |  3.8 | 887  | TVSMESHARIKI* 2011  Petersburg  | KIKORIKI 2018  St Petersburg  |  248 |  4.0 |  15 |

 Channel registration year  Production studio  Location

* Smeshariki series.

Source: HSE estimates based on the data of official YouTube pages of animaiton series (as of October 2020).

AWARDS OF RUSSIAN ANIMATION STUDIOS FOR THE PRODUCED CONTENT: 2017–2019

| Studio | City | Number of nominations | | | | Total |
|--|---------------|-----------------------|------|------|---------|-------|
| | | Multimir | BCF* | Ikar | ORFAF** | |
| Soyuzmultfilm | Moscow | 2 | 5 | 11 | 11 | 29 |
| Petersburg Animation Studio | St Petersburg | 7 | 1 | 7 | 8 | 23 |
| Parovoz Animation Studio | Moscow | 12 | 0 | 2 | 1 | 15 |
| Melnitsa Animation | St Petersburg | 8 | 1 | 1 | 1 | 11 |
| School-Studio SHAR | Moscow | 0 | 3 | 2 | 6 | 11 |
| CTB Film Company | St Petersburg | 8 | 0 | 1 | 2 | 11 |
| Animaccord | Moscow | 9 | 0 | 0 | 0 | 9 |
| Pchela Animation Studio | Moscow | 0 | 1 | 5 | 2 | 8 |
| The Gerasimov Institute of Cinematography (VGIK) | Moscow | 0 | 1 | 0 | 6 | 7 |
| Aeroplan Studio | Moscow | 4 | 0 | 0 | 2 | 6 |

* Big Cartoon Festival.

** Open Russian Festival of Animated Films.

Source: HSE estimates based on the data about winners of Multimir Award, Ikar National Animation Award, Big Cartoon Festival (Moscow), and Open Russian Festival of Animated Films for 2017–2019; and open data of online resources Animator.ru and KinoPoisk.

Moscow- and St Petersburg-based studios are leading by the number of wins at Russian animation festivals and received awards during 2017–2019. 'Soyuzmultfilm' tops the rating with 29 awards under its belt, followed by 'Petersburg Animation Studio' (23 awards) and a Moscow studio 'Parovoz'. 127 animation projects have won in at least one nomination, of which 25 have been awarded on two and more occasions.

For the last ten years Russian studios have been actively launching YouTube channels for their animation series. **The leader by the number of views and subscribers is 'Masha and the Bear' show for children (Animaccord).** There are over 800 episodes with over 25 billion views.

Russian cartoons have gained popularity abroad. Thus, the English-language channel of 'Masha and the Bear' has almost 500 episodes, which cumulative audience has reached 8.5 billion views. The biggest number of episodes in English are represented on the channel streaming 'The Fixies' (Aeroplan Studio).