



who

2016 snapshot: How we live today

Source: ONS report June 2016

UK population is **65.11 million** (grew by 0.5m from the previous year)

England: 54.79m (of which London: 8.67m)

Scotland: 5.37m

Wales: 3.09m

N. Ireland: 1.85m

50.7% female
49.3% male

While the median age is 40, the older population continues to increase. More than 1 in 6 (17.8%) are aged 65+:

Age group	% population
0 – 9	12.4%
10 – 14	5.5%
15 – 24	12.5%
25 – 34	13.6%
35 – 44	12.9%
45 – 54	14.0%
55 – 64	11.3%
65 – 74	9.7%
75 – 84	5.7%
85+	2.4%
Total	100.0%

ONS 2016 based on data from local authorities in England & Wales

The UK population is projected to reach 70 million by mid-2027 and 74.3 million by mid-2039. By then, more than 1 in 12 citizens are projected to be aged 80 or over (source: ONS).

StudioCanal



Entertainment



Finding families: Four- and five-star reviews greeted both of these enthralling cinematic dramas, distinctly positioned in the competitive 2016/17 awards season. Casey Affleck and Dev Patel were both well-received winners of the BAFTA awards for Best Actor and Best Supporting Actor, respectively, for their roles in these films on Sunday 12 February 2017. *Manchester by the Sea* also won the Best Original Screenplay BAFTA for Kenneth Lonergan, who also directed; while the Best Adapted Screenplay mask went to Luke Davies for *Lion*. Both films played in the UK on the Curzon circuit, which was awarded a Special BAFTA for Outstanding British Contribution to

Cinema, an attraction that competes in the 'going out' market, is estimated to reach **77%** of the UK population – so more than 50m people go to the cinema at least once during the year.

'The movies' can hold various different appeals to people at different times, e.g. a family outing; a party; a date; a girls' night out; an afternoon or evening with a partner or mate(s); perhaps also a way to stay 'in the know' amongst social peers. Audiences comprise a complex mosaic of consumer segments, varying substantially film by film, week by week.

UK cinema audience by age 2015/2010

	2015	2010
7 – 14	13.6%	13.6%
15 – 24	29.4%	31.8%
25 – 34	18.7%	23.3%
35 – 44	16.3%	14.0%
45 – 54	9.5%	8.7%
55+	12.5%	18.7%
Total	100%	100%

BFI/CAA/Film Monitor

Overall, the UK cinema audience tends to skew young and upmarket: 58% ABC1 vs. 39% non-cinemagoers; 36% aged 16–34 vs. 31% UK population; 85% heavy internet users vs. 56% non-cinemagoers (source: DCM).

Young adults aged 16–34 consume more films and media than ever across a range of devices; they are often early adopters of new cinema releases, enjoying a deeply immersive, out-of-home experience in IMAX, 3D and/or Dolby Atmos on a film's opening weekend. By contrast, older people are more likely to visit cinemas on weekdays, a little after a film's launch date.

Of course, many forms of **media and communications** play a central, and fast evolving, role in people's lives. As ever more people become ever better connected, they tend to spend more time doing what they love online – including keeping in touch with friends and family, and watching the latest on-demand series or features. In its 2016 *Communications Market Report*, the regulator Ofcom noted that:

- Average UK household spending on TV, radio, internet, telephony and post was £18.90 per month
- 4G take-up has increased rapidly to 48% of UK adults (from 30% in 2015), while 4G mobile services are now available to 98% of UK premises
- 86% of UK adults have internet access at home
- Average internet use is estimated at 25 hours online per week, rising to 29 hours among 16–24s
- The smartphone is now the device of choice for using the internet – 71% of adults claimed to own a smartphone, more than any other connected device, rising to 90% among under 35s
- Wider internet availability, the provision of faster connection speeds, and the popularity of using a smartphone to go online all contribute to a rise in use of on-demand and online services (e.g. shopping, accessing health information, news)

UK cinema audience demographic trends

- **7-14 year olds:** Broadly static as a proportion of the overall cinema audience, despite being a rising proportion of the UK population – so a growing opportunity here – although the millennial generation tends to expect (online) content to be free
- **15-24s:** Traditionally the cinema's most frequent/core audience, but declining as a proportion of both the audience and the population
- **25-34s:** Increasing as a proportion of the population but declining as a proportion of the cinema audience
- **35-44s:** Increasing as a proportion of the cinema audience
- **45+:** Increasing as a proportion of the cinema audience as the population continues to grow older