

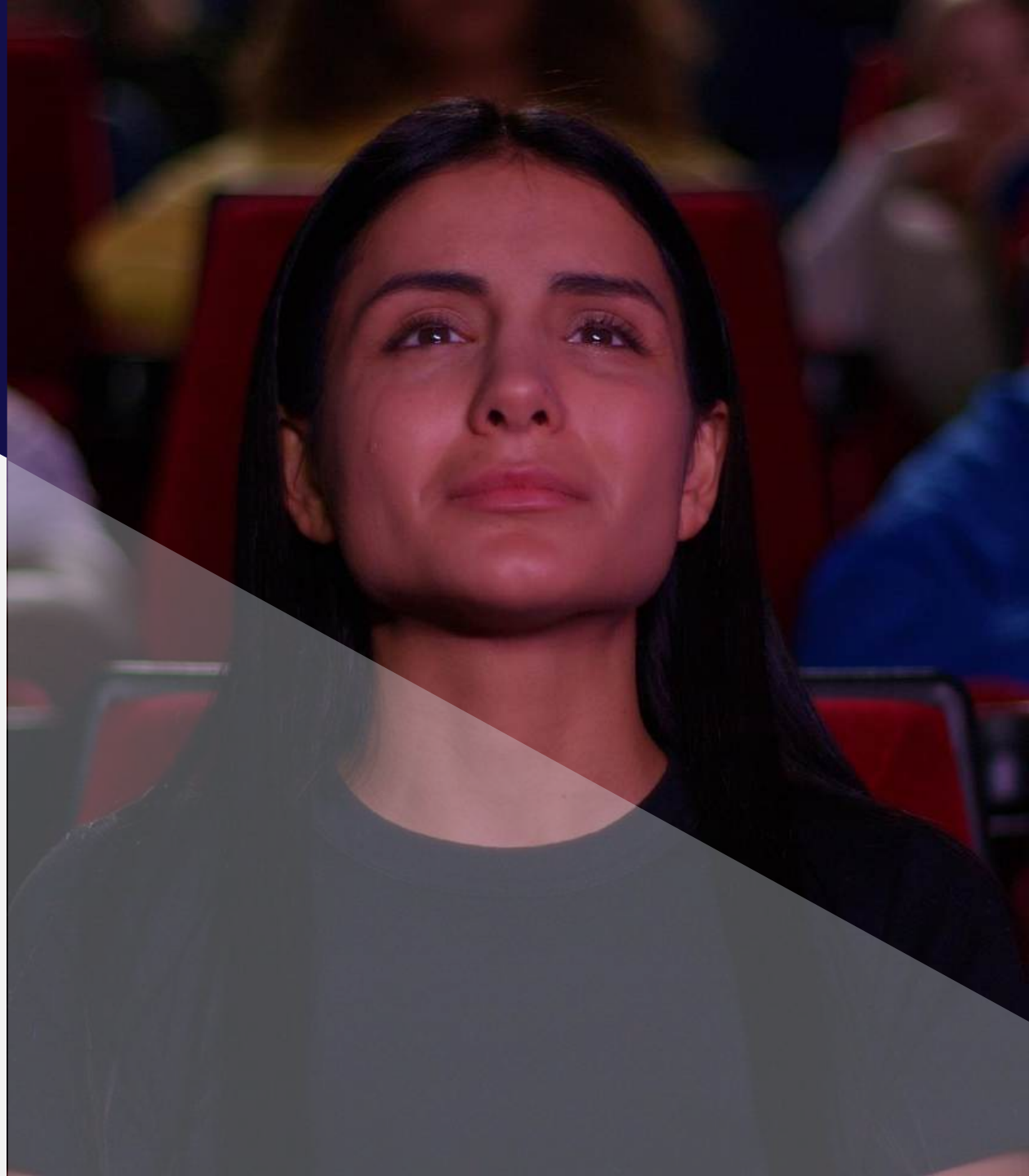


## A Fresh Take

Staying ahead of evolving dynamics in the marketplace and our culture

# Inside Out

## How Cinema Turns Emotion Into Brand Opportunity



**“Watching a film in the theater with an audience is an experience. We can laugh together, cry together, scream and fight together, perhaps sit in devastated silence together. And in a time in which the world can feel very divided, this is more important than ever. It’s a communal experience you simply don’t get at home.”**

Sean Baker, Best Director Oscar Speech for *Anora*  
(03/02/2025)



## Cinema brings joy, suspense, drama and humor to life, driving brand impact

A trip to the movie theater is more than entertainment, it is joy, excitement and even a tear or two. It **sparks passion, fuels fandom and inspires action**. From the thrill of a trailer drop to the nostalgia of beloved IP (intellectual property), movies create 'core memories' that shape who we are and connect us to others.

For marketers, these deeply felt experiences are more than emotional, they're opportunities. Cinema captures attention in an immersive environment that **primes highly engaged audiences to notice, remember and respond to brands**.

### What you'll learn in this report

- ▶ Why emotion is the new 'premium' and how cinema's immersive environment drives engagement, recall and brand impact
- ▶ How 'emotional fandom,' community and anticipation around movies delivers audience experiences similar to another high-engagement platform: sports
- ▶ How 'the momentum of movies' creates continuous, high-value opportunities for marketers

# In this report, we explore how cinema transcends entertainment to emotionally engage audiences and drive outcomes for advertisers

1

'Emotion' is the  
New 'Premium'



2

Big Screen, Big Feels,  
Big Outcomes



3

The 'Surround Sound'  
of Cinema as 'Sport'



4

The Momentum  
of Movies



1

**‘Emotion’ is the New ‘Premium’**



# Exciting, high-quality premium content captures audience attention and fosters engagement through strong emotional connections

- ▶ Aligning ads with emotional content can quadruple their effectiveness in creating impact and building brand equity\*

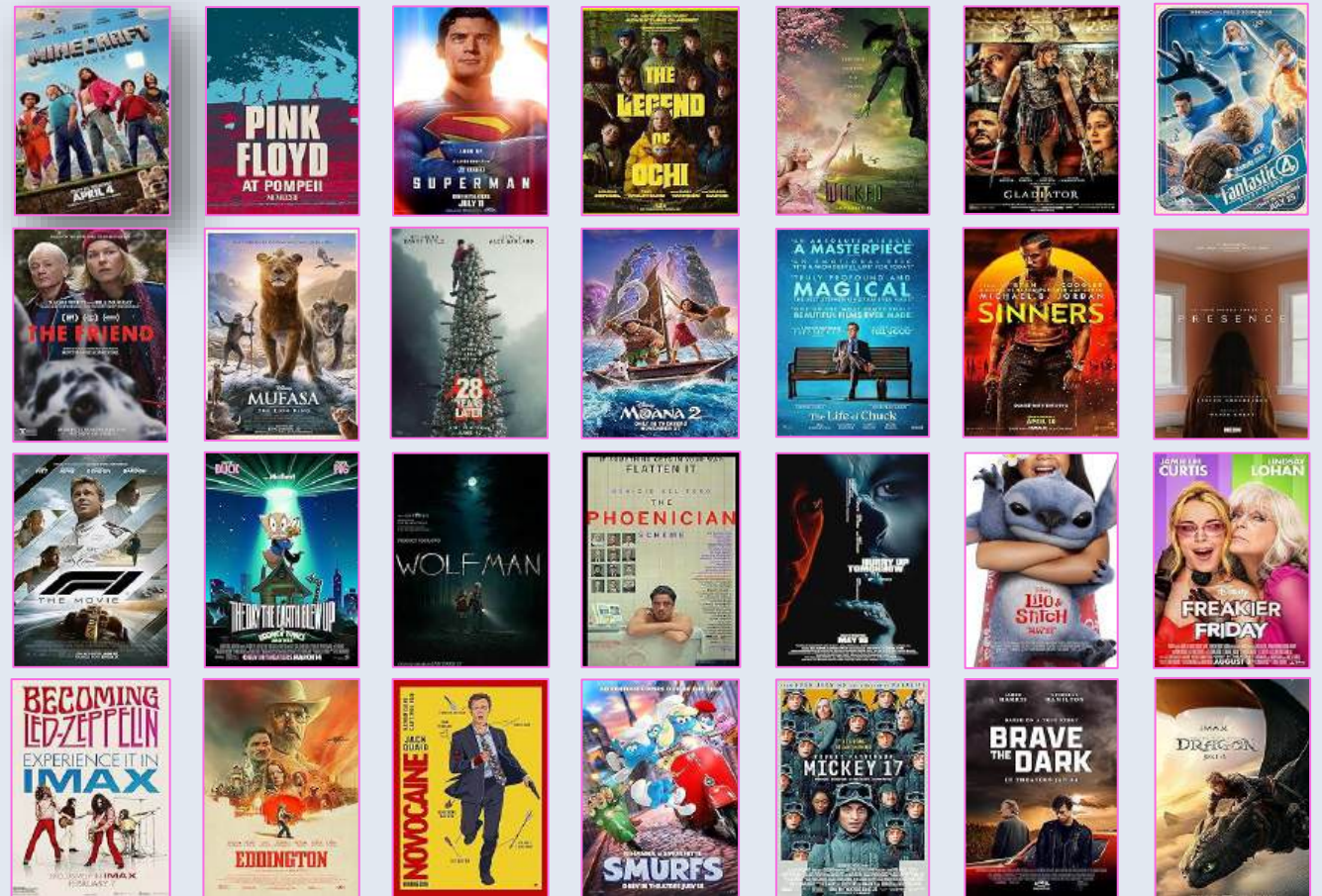
## 'Emotion' is the new 'Premium'

'Premium content' – industry shorthand for advertising impact – has primarily been related to the cost of production, with more expensive programming being deemed more premium.

However, research suggests that 'premium' has more to do with the **emotional connection** viewers have with their favorite content, which can be significantly impactful at **driving ad receptivity**.

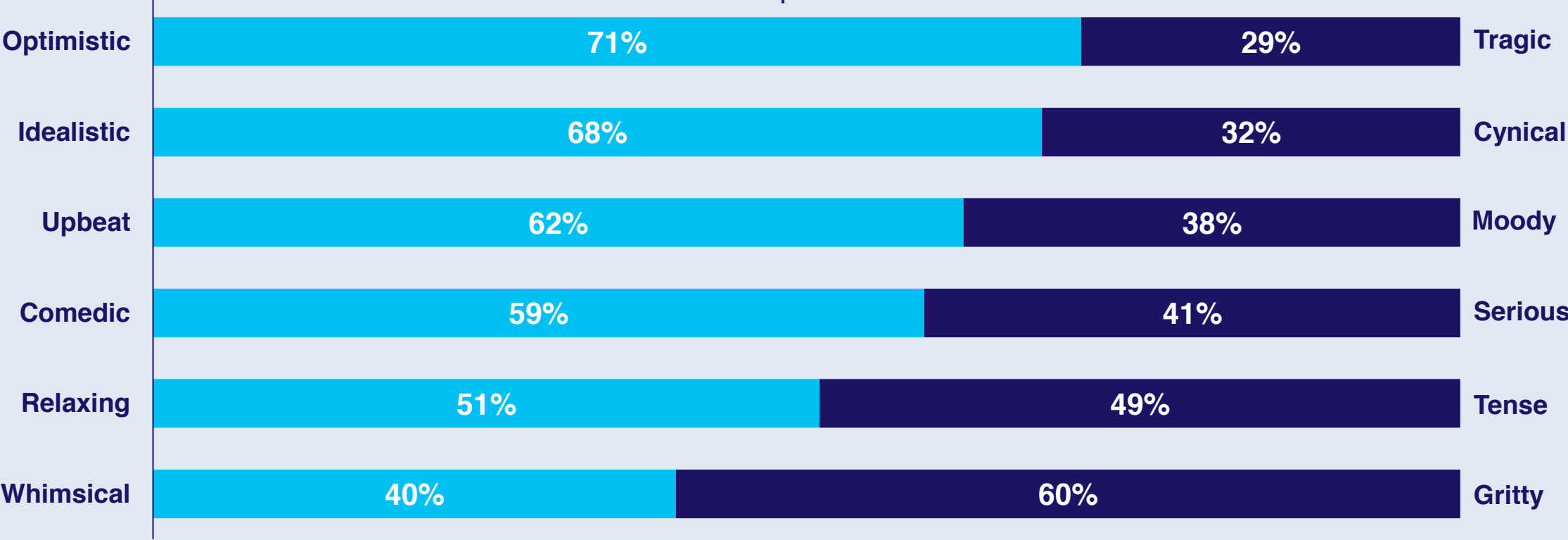
Source: Kantar, *Harness the power of emotion in digital advertising*, 3/13/2023.

## Sampling of Recent Theatrical Releases



# Audiences are drawn to a variety of positive, emotional storytelling tones including ones that are optimistic, idealistic, upbeat and lighthearted

The Tone of Storytelling Audiences Prefer in a Movie or Show  
% of respondents



**How to read:** 71% of respondents prefer optimistic tones while 29% prefer tragic tones

Source: MarketCast, *New America Content Exploration*, July 2025.

# The cinematic environment drives positive emotion among almost all moviegoers which creates strong opportunities for brand engagement

The moviegoing experience drives a

**+22%**

lift in positive emotions

Pre-Screening

**78%**

are in a **positive mindset** entering the theater



Post-Screening

**95%**

are in a **positive mindset** after their theater experience

“When people are **emotionally engaged**, they not only **remember more**, they **care more**. This presents a huge opportunity for brands to **foster deeper consumer connections.**”

Devora Rogers, Chief Strategy Officer at Alter Agents  
*(PR Newswire, 6/10)*

Source: Screenvision and Alter Agents, *Cinema's Emotional Resonance*, 2024.

**A positive, engaged mindset makes audiences receptive to ads and primes them to be more likely to purchase the products they see**

**Impact of Positive Mindset on Response to Advertising**

**+18%**

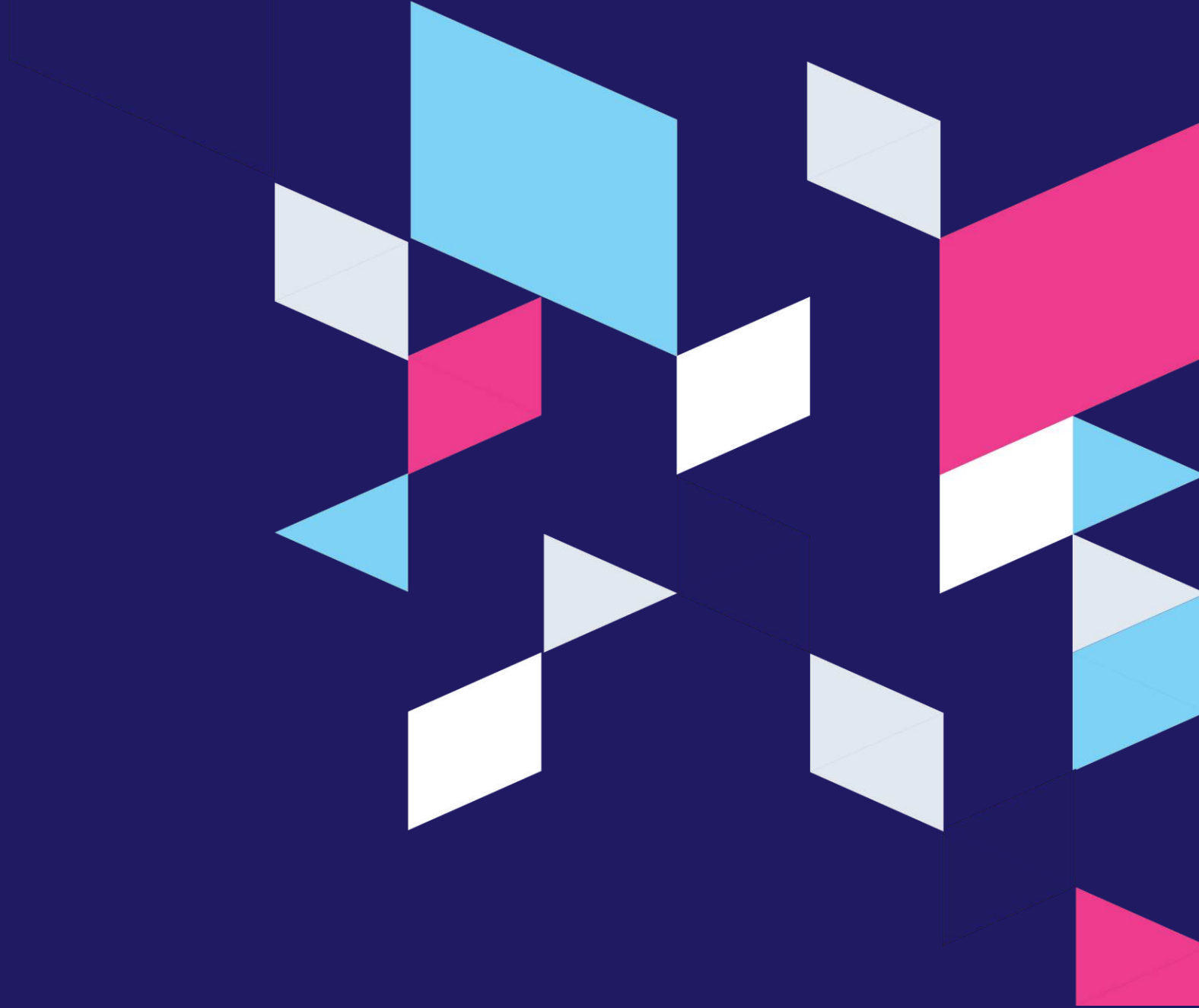
Increase in brand favorability

**+35%**

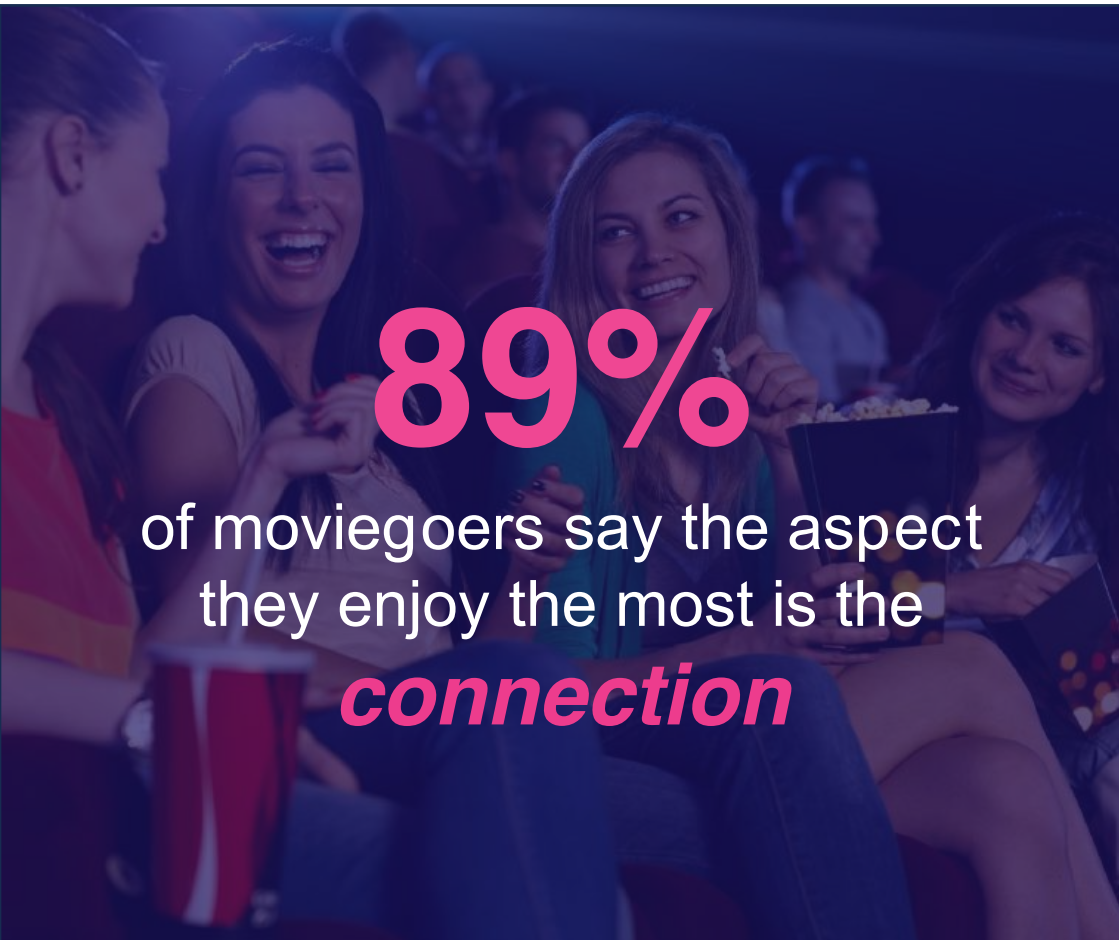
Increase in purchase intent

2

**Big Screen, Big Feels,  
Big Outcomes**



# Going to the movies is a shared experience that leaves audiences feeling more deeply connected to family, friends and other fans



% of respondents who go to the movies...



**97%**

in a  
**Group**



**83%**

with  
**Family**



**75%**

with  
**Friends**

(Gen Z respondents)

Source: Screenvision and Alter Agents, *Cinema's Emotional Resonance*, 2024. 'Group' includes at least one other person.

# In fact, most people across lifestages mention ‘spending time with friends and family’ as a top reason for going to see a movie at the theater

## Top reason for going to the movie theater

% who said ‘to spend time with friends and family’ is a ‘major factor’

Gen Alpha

68%

64% of Gen Alpha agree they’ll go to the theater ‘to make seeing the movie feel like a *special event*’

Gen Z

60%

Millennials

59%

Gen X

63%

Source: NRG, *Gen Alpha Saves the Box Office?*, August 2025.



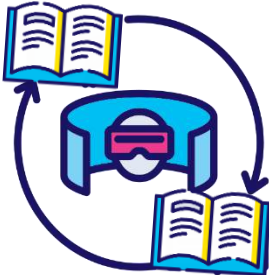
# The communal experience makes cinema a uniquely powerful environment where advertisers can connect more deeply through collective reactions

## Moviegoers agree with the following statements



**96%**

The **sound** and **visuals** in the theater make the experience feel **more immersive**



**92%**

Watching movies in a theater helps them feel **immersed** in the story



**84%**

The **shared reactions** of the audience **enhance their enjoyment** of the movie

Source: Screenvision and Alter Agents, *Cinema's Emotional Resonance*, 2024.

# Movie soundtracks turn those communal reactions into shared emotions, deepening the audiences' connection to the story

**billboard**

December 18, 2024

**'WICKED' BREWS UP RADIO HITS IN 'POPULAR' & 'DEFYING GRAVITY': 'IT'S A POP CULTURE MOMENT'**

*The* **Hollywood**  
REPORTER

July 15, 2025

**Iggy Pop on Closing Out 'Superman' Soundtrack: Hero is "the Best Friend You Could Have"**

**N7**  
**GN**

May 7, 2025

**Is the music from "Sinners" stuck in your head? A composer breaks down why it could be a modern classic**

**billboard**

July 8, 2025

**WHEN DINOSAURS RULED THE CHARTS: THE 'JURASSIC PARK' FRANCHISE'S BILLBOARD HISTORY**



# The communal power of cinema doesn't just create shared emotions; it also activates the brain to make brands unforgettable

## Cinema increases brain activity in four measured neuroscience areas



**+21%**

**Global memory**



**+16%**

**Personal relevance**



**+14%**

**Detail memory**



**+2%**

**Approach / withdrawal**

Source: The Media Leader, *Neuroscience explains why cinema ads are 'significantly' more impactful and memorable*, November 29, 2023. "Global memory", or right brain, influences more "big picture" holistic processing while "detail memory", or left brain, relates to how people remember brands, key messages, calls to action, and ad creative. "Personal relevance" refers to how personally relevant participants found the content, whereas "approach/withdrawal" links to "the lean in/lean out emotional direction" to the content they were exposed to.

The cinematic environment evokes powerful emotions which enables brands to connect more effectively with highly engaged audiences

84%

of moviegoers agree that watching movies in a theater is an **emotionally powerful experience**

+20%

Increase in **brand favorability** after exposure to cinema ad\*



Source: Screenvision and Alter Agents, *Cinema's Emotional Resonance*, 2024. \*Screenvision, *Custom Research Study Norms 2024-2025*.

3

## The 'Surround Sound' of Cinema as 'Sport'



# Movies have similar emotional attributes as sports while providing a much more accessible and affordable experience for audiences and brands

## Attributes of 'Emotional Fandom' in Cinema & Sports



**Personal  
Investment**



**Community  
&  
Belonging**



**Rituals  
&  
Traditions**



**Identity  
&  
Loyalty**



**Escapism  
&  
Shared Joy**

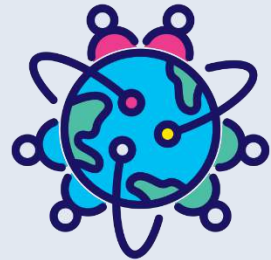
# Within these attributes, movies can elicit a similar level of audience intensity and connection as sports when it comes to ‘emotional fandom’

## Attributes of ‘Emotional Fandom’ in Cinema & Sports



### Personal Investment

Movie fans are emotionally invested in **characters, franchises, and storylines**



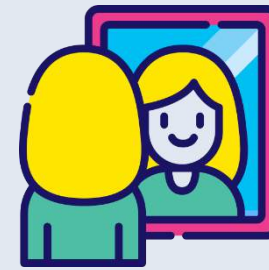
### Community & Belonging

Audiences flock to theaters for **opening weekends**, connecting with others who share their **love for cinema**



### Rituals & Traditions

**Dressing up for premieres, quoting famous lines, or rewatching classics** on anniversaries



### Identity & Loyalty

Fandom around **film franchises** can form **part of personal identity**, often passed through generations



### Escapism & Shared Joy

Cinema offers **immersion into different worlds, catharsis, and collective joy or awe**

Sports fans **live and die** by the wins and losses of their **favorite teams**, often tying their emotions to outcomes

Fans gather in stadiums, bars, or at home to **watch games together**, creating **shared experiences and traditions**

**Ritualistic superstitions, wearing team jerseys, tailgating, and chanting** in stadiums

**Team allegiance** often becomes a **core part of identity**, which is **passed down through families**

Sports provide **entertainment, distraction, and a sense of hope**, no matter the outcome

# Movie fans treat a theatrical release like a 'big game' with most people across lifestages preferring to see a movie on its opening weekend



% of respondents who prefer to see a new movie on opening weekend, by generation

Gen Alpha

63%

Gen Z

58%

Millennials

59%

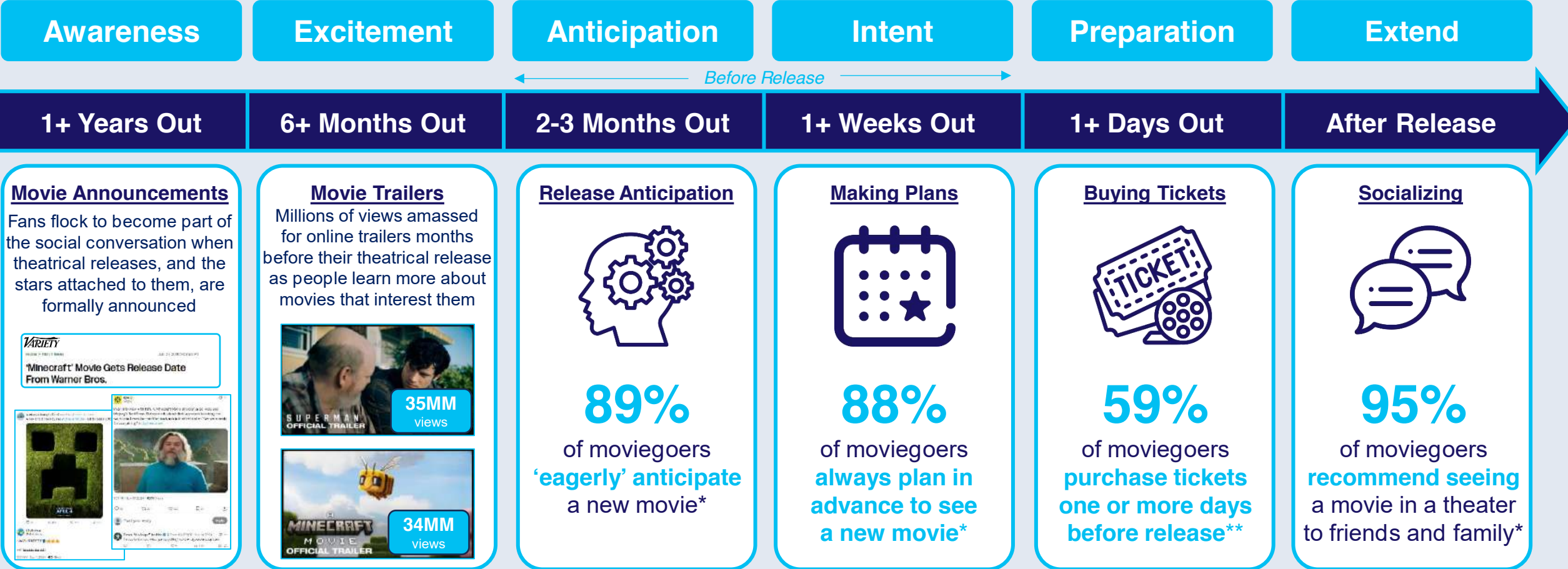
Gen X

53%

Source: NRG, *Gen Alpha Saves the Box Office?*, August 2025.

# Much like sports, the 360-surround sound of cinema keeps audiences connected to a theatrical release well before and after showtime

► Download our full report, '[Reeling in Audiences](#)', to learn more about the 10 acts of attention along the cinematic journey to the movies



Source: Total trailer views as of 8/20/25 from the film studio's official YouTube channel. \*NCM, *Moviegoing Audience Insights, Behind-The-Screens (BTS) Online Community*, November / December 2023, Base: A18+ Moviegoers. \*\*Screenvision, Screen Engine Data, March 2024. Base: Total Respondents (18+), 'Thinking about your movie ticket purchasing behavior, when do you typically purchase your tickets for a movie you would like to see?'

# Like sports, theatrical immersion extends beyond the screen, as fans step into the world of movies through merchandise, travel and related events


**Movie Fans Collect Merch to Feel Closer to the Stories They Love**


 **Forbes** July 24, 2025  
 An \$80 'Fantastic Four' Popcorn Bucket? New Merch Breaks Size—And Price—Record


 **CBR.** June 3, 2025  
 A Record Amount of Superman Merchandise is Hitting Shelves

 **Hollywood Reporter** December 6, 2024  
 Oz-Mania Continues Post-'Wicked' With 'The Wizard of Oz' 85th Anniversary Collabs

**Fans Flock to Tourist Destinations Featured On Screen**

 **K** August 12, 2025  
**THAI TOURISM RIDES HOLLYWOOD WAVE WITH JURASSIC WORLD AND ALIEN: EARTH**

 **msn** June 20, 2025  
 Holiday hotspot overrun with movie fans celebrating Jaws' 50th anniversary

 **NATIONAL GEOGRAPHIC** November 7, 2024  
 On the trail of Paddington Bear from London to Peru

**Movie-Related Events Attract Thousands of Fans**

 **M** August 30, 2025  
 D23 2025: Every movie and series announced and shown at this year's fan event, so far

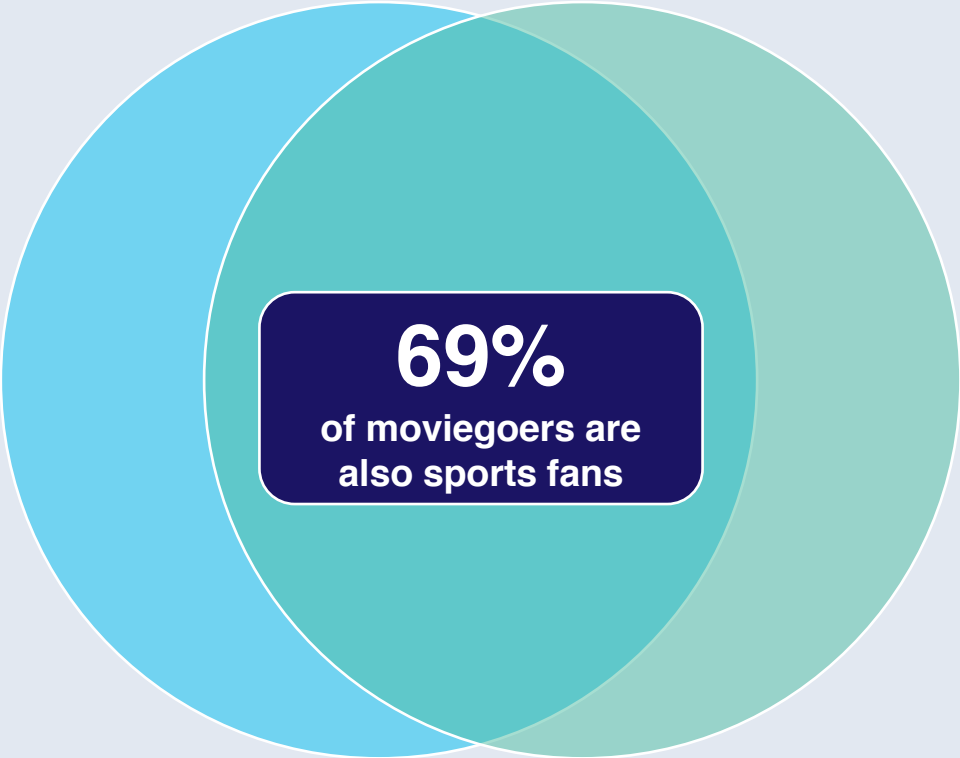
 **Milwaukee Magazine** May 14, 2025  
 Over 30,000 People Attended the 2025 Milwaukee Film Festival

 **Forbes** October 21, 2024  
 New York Comic Con 2024: Over 200,000 Attendees Flooded The Jacob Javits Center

# Cinema offers marketers an opportunity to extend impact and reach across highly engaged audiences even for brands that are buying sports

## Audience Reach Overlap of Fandoms

■ Moviegoers   ■ Sports Fans



Source: VAB analysis of MRI-Simmons, Spring 2025 Study, Moviegoer = Watched a movie in theaters in the last 12 months. Sports Fan = Watched sporting event on TV in the last 12 months. % overlap represent moviegoers that are also sports fans.

4

## The Momentum of Movies

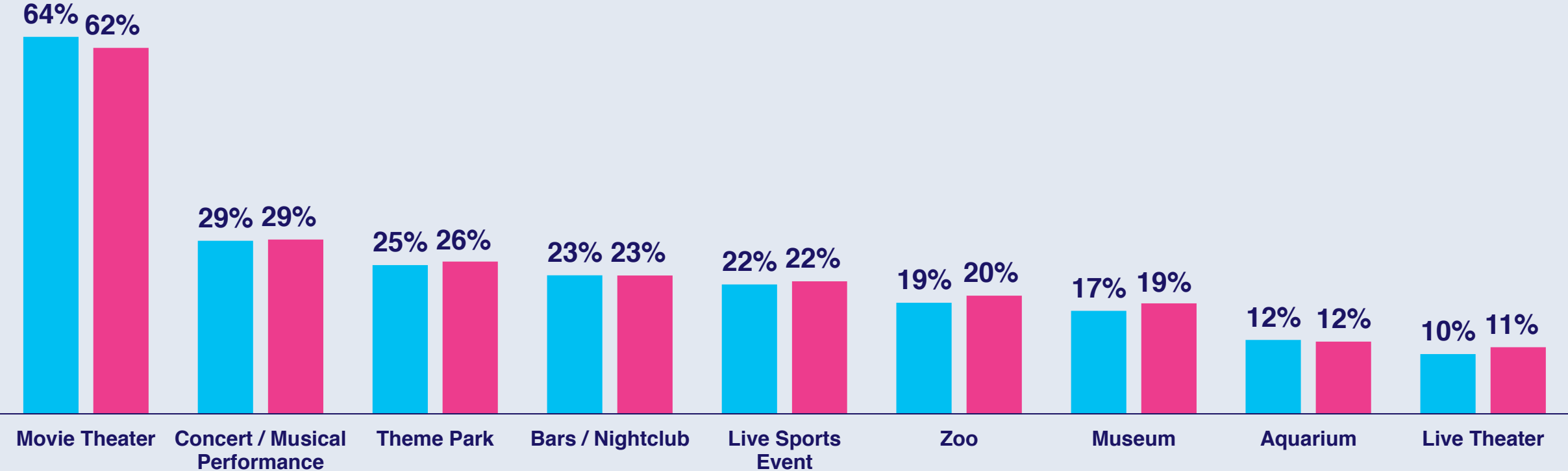


# Movies are the most popular ‘away from home’ entertainment activity, surpassing concerts and sports, attracting passionate audiences at scale

## Entertainment / Leisure Activities Participated In The Last 12 Months

% of respondents

A18-34 A25-44



Source: VAB analysis of MRI-Simmons Spring 2025 Doublebase USA Study. Base: A18+. Reflects leisure activities participated in the last 12 months. ‘Concert / Musical Performance’ includes respondents who have attended any of the following music performances: country, rock, classical music / opera, R&B / hip-hop / rap, other music performances. Live sports events includes any live sporting event attended in the last 12 months. Theme parks include any theme park visited in the last 12 months.

**Theatrical movies are very popular ‘at home’ entertainment as well, making up 75% of the top 20 streamed movies (and ~\$4B in box office revenues)**

**Top 20 Streaming Programs – Movies, 1H 2025**

Rank	Movie	Streamer	Minutes Viewed (in Billions)	Domestic Box Office Revenue
1	Moana 2	Disney+	7.227	\$460,405,297
2	Despicable Me 4	Netflix	6.274	\$361,004,205
3	Back in Action	Netflix	5.264	N/A
4	Moana	Disney+	3.846	\$248,757,044
5	The Wild Robot	Netflix / Peacock	3.817	\$143,901,945
6	Sonic The Hedgehog 2	Netflix / Paramount+	3.732	\$190,872,904
7	The Electric State	Netflix	3.254	N/A
8	Wicked	Peacock	3.233	\$473,231,120
9	Frozen	Disney+	3.056	\$400,953,009
10	The Accountant 2	Prime Video	3.031	\$65,523,366
11	Kraven The Hunter	Netflix	2.968	\$25,026,310
12	Gladiator II	Paramount+	2.799	\$172,438,016
13	Twisters	Peacock	2.781	\$267,762,265
14	Nonnas	Netflix	2.734	N/A
15	Mufasa: The Lion King	Disney+	2.730	\$254,567,693
16	The Life List	Netflix	2.691	N/A
17	Super Mario Bros. Movie	Netflix	2.666	\$574,934,330
18	Straw	Netflix	2.656	N/A
19	Encanto	Disney+	2.620	\$96,093,622
20	Lilo & Stitch (2002)	Disney+	2.619	\$145,794,338
<b>Theatrical Total</b>			<b>53.399</b>	<b>\$3,881,265,464</b>

Source: VAB analysis of Nielsen, *Top 20 Streaming Programs – Movies*, Jan '25 – Jun '25. \*Domestic theatrical B.O. from Boxofficejo.com, as of 8/20/25.

Note: Light blue movies denote theatrical releases and dark blue movies denote 'direct to streaming' releases.

**Top 20 Streaming Movies – 1H 2025**

**75%**

were theatrical releases...

...which accounted for

**\$3.9B**

in domestic theatrical revenue\*

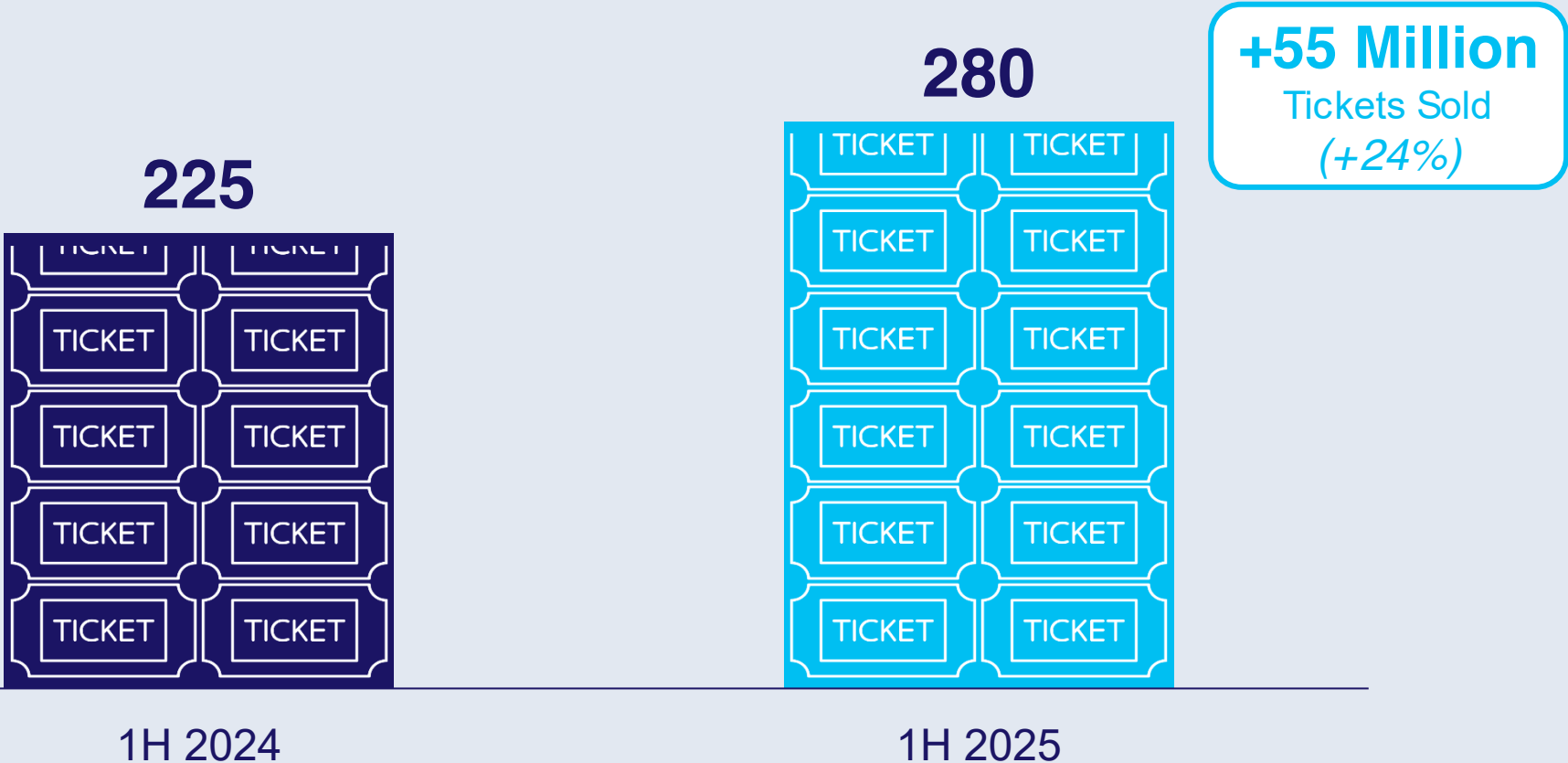
and...

**54.4B**

minutes of streaming viewing

# Theatrical ticket sales are on the rise, with 55 million more admissions in the first half of 2025 compared to 2024, a 24% increase vs. prior year

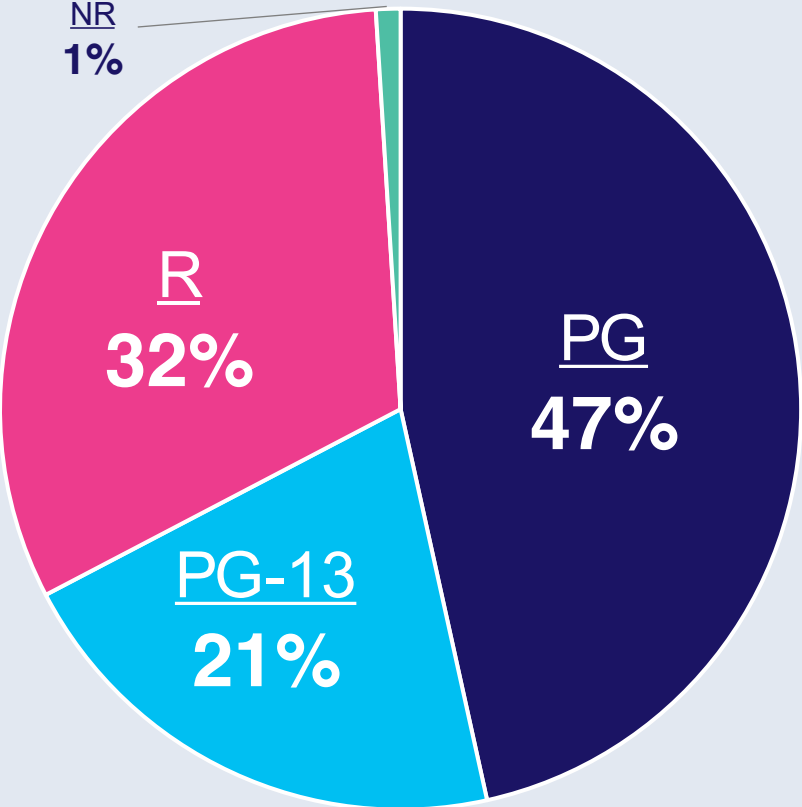
## Movie Tickets Sold In Millions



Source: The People Platform, 2025 Mid-Year State of Cinema Report: Admissions Surge, Powering a Banner Year, August 2025.

# The cinema has movies for everyone, from family-friendly ‘PG’ to mature ‘R’ movies, offering marketers an ability to reach key audience segments

**Share of Tickets Sold by MPA Rating**  
1H 2025



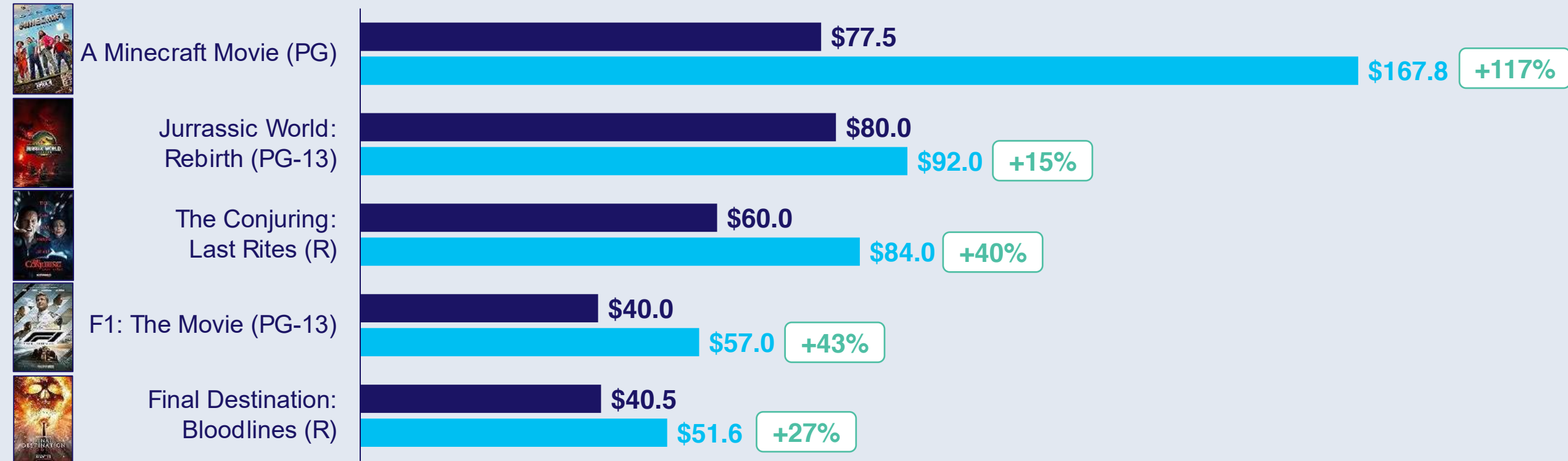
Source: The People Platform, 2025 Mid-Year State of Cinema Report: Admissions Surge, Powering a Banner Year, August 2025.

# Recent releases have even overperformed industry analysts' top-end revenue projections as audiences seek out cinematic experiences in droves

## Domestic Box Office Projections vs. Opening Weekend Box Office

\$ in MM

■ Projection ■ Revenue



Source: Projections based on VAB analysis of Screendollars, *Wednesday Report Forecast*, 4/2/25, 5/14/25, 6/25/25, 7/2/25 & 9/3/25. Chart projections reflect a median of projection range (The Conjuring: Last Rite's 9/3 projection was \$55MM to \$65MM, with a median of \$60MM). Opening Weekend Revenue based on finalized opening weekend box office per [boxofficemojo.com](https://www.boxofficemojo.com), as of 9/9/25.

# Studios are committed to bringing more films to the big screen, with larger budgets, expanded theatrical slates and re-releases of past favorites

THEWRAP.

August 13, 2025

**New Paramount Plans to Ramp Film Slate Up to 20 Theatrical Films Per Year**

CNN Business

August 25, 2025

**Netflix's 'KPop Demon Hunters' led domestic weekend box office in unexpected win**

DEADLINE

March 7, 2025

**Amazon MGM Will Release 12-14 Films Theatrically In 2026 As Studio Commits "Financially And Philosophically" To The Big Screen**

SCREENRANT

November 22, 2024

**Wicked Part 1 & 2 Combined Budget Reportedly Revealed, And It Set A Record For Universal**

SCREENRANT

June 10, 2025

**Superman's Reported Budget Makes It One Of The Most Expensive Movies Ever, Possibly Bigger Than Endgame**

Forbes

August 31, 2025

**'Jaws' Re-Release Beats Newcomers At Box Office —As 'Weapons' Returns To No. 1**

# Emotions coming to a theater near you: High-profile movies and specialty films create opportunities for brands to connect with engaged audiences

<p><u>10/3/25</u></p> 	<p><u>10/10/25</u></p> 	<p><u>10/10/25</u></p> 	<p><u>10/10/25</u></p> 	<p><u>10/17/25</u></p> 	<p><u>10/17/25</u></p> 	<p><u>10/31/25</u></p> 	<p><u>11/7/2025</u></p> 
<p><u>11/14/25</u></p> 	<p><u>11/21/2025</u></p> 	<p><u>11/26/2025</u></p> 	<p><u>12/5/25</u></p> 	<p><u>12/12/25</u></p> 	<p><u>12/19/25</u></p> 	<p><u>12/19/25</u></p> 	<p><u>12/25/25</u></p> 

Source: IMDb, Upcoming Releases, 2024/2025. Note: Release dates planned as of 8/21/2025 and subject to change.

# Key Marketer Takeaways

## Cinema creates an immersive environment for brands to engage audiences through emotion

- ▶ Emotion is the new premium, with cinema's powerful storytelling that gives brands a unique opportunity to connect more deeply and memorably with audiences
- ▶ The communal nature of the theater amplifies positive emotions and shared energy, creating a uniquely impactful space where brand relationships feel authentic and lasting
- ▶ Like sports, cinema taps into 'emotional fandom,' passion and community, which offers marketers an opportunity to extend impact and reach across highly engaged audiences intensely immersed in collective experiences
- ▶ Shared, immersive theater experiences drive stronger outcomes, with the collective energy of the audience amplifying emotions and strengthening brand connections

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What It Means for Multiscreen TV  
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## Disconnect to Reconnect

How Real-Life Shared Experiences Are the  
Antidote for Social Media Isolation Among Gen Z



## The Pursuit of Happiness

How Mood Lights Up  
Ad Engagement at the Cinema



## Reel Talk

20 Trends Exploring the Resurgence &  
Heightened Value of Cinema



## Reeling in Audiences

10 Acts of Attention Along  
the Moviegoer's Journey



## Show Me the Money

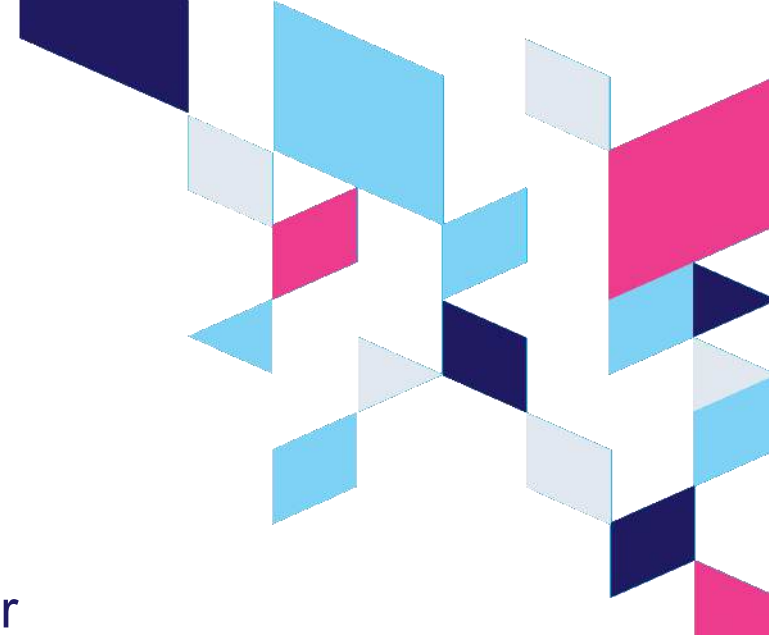
Highlighting the Value of Moviegoers  
Across 20 Major Categories

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