

THE STRENGTH OF THEATRICAL EXHIBITION

DECEMBER 2025 UPDATE



INTRODUCTION

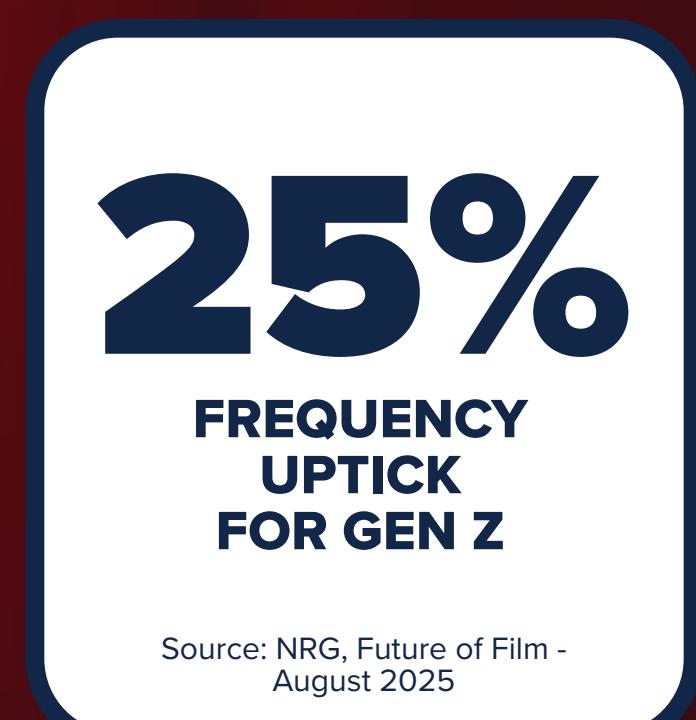
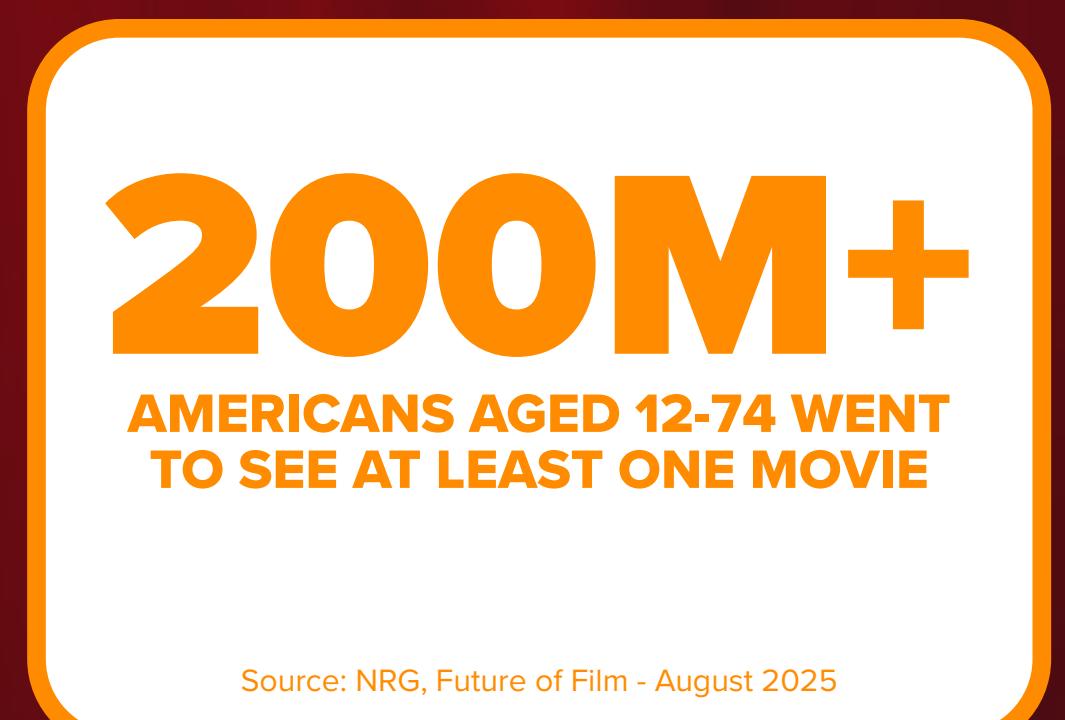
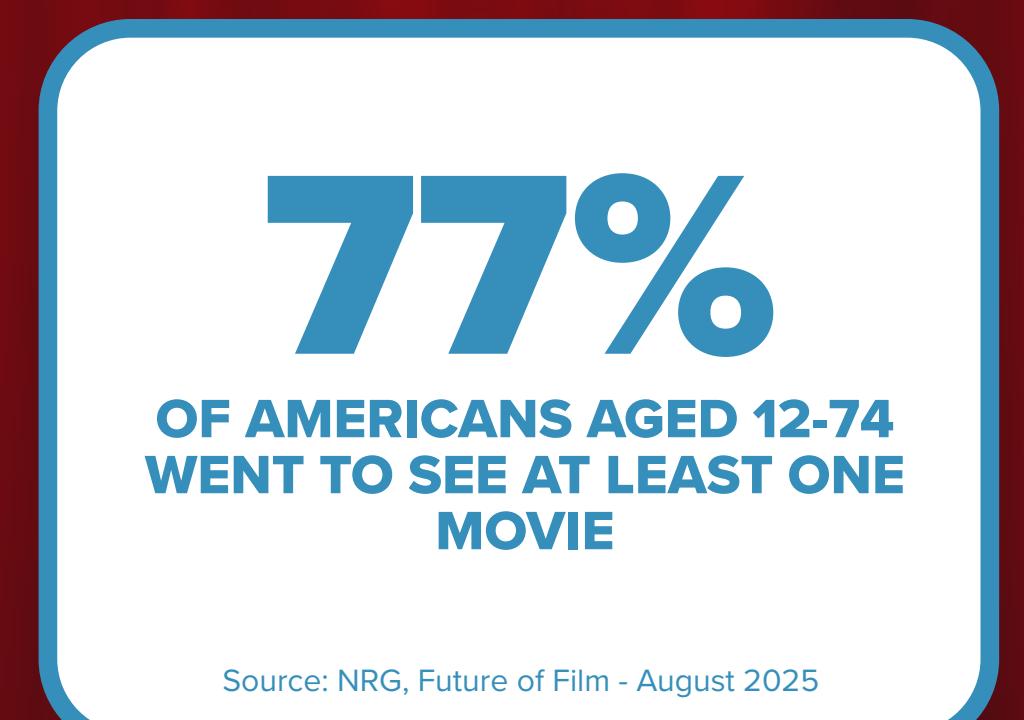
As our industry is about to experience yet another massive shift, there is one constant that remains unchanged: **movie theatres sit at the forefront of the experiential economy—the beating heart of cities and towns all around the world.**

In this report, which serves as an update to our **Strength of Theatrical Exhibition** report from December 2024, we take a closer look at how movie theatres connected with a wide range of consumers this past year, from building loyalty by investing in experiences to providing something for everyone on the big screen.

As a result, moviegoing remains a mass behavior with **77%** of Americans visiting a theater over the past 12 months, according to a study fielded by National Research Group in August 2025. And despite the noise around devices, the big-screen experience continues to win attention across generations. Per NRG, frequency among Gen Z moviegoers increased by **25%**, demonstrating how through innovation and experiences, exhibition is building the moviegoing audience of tomorrow.



Source: NRG, Future of Film - August 2025



RE-INVESTMENT ERA: \$1.5B IN UPGRADES IS FUELING LOYALTY PROGRAM GROWTH

15%

**JUMP IN LOYALTY
CLUB MEMBERS
IN NORTH
AMERICA SINCE
2024**



Source: Cinema United

136M

**CURRENT
NUMBER OF
THEATRE
LOYALTY CLUB
MEMBERS IN
NORTH AMERICA**



Source: Cinema United

The increase in loyalty club members comes as the North American exhibition industry re-invested more than **\$1.5 billion** in their theatres in the past year, demonstrating a clear financial commitment to creating the premium entertainment experiences that fans of movies on the big screen crave.



Moviegoers grab a bite to eat and some drinks at THE LOT's theatre in San Diego, California



A big crowd waits for their movie to start at LOOK Dine-in Cinemas in New York City
Photo Credit: Cassie Sokoloff

SOMETHING FOR EVERYONE:

EXHIBITION WILL HAVE A WIDE SELECTION OF FILMS FOR CONSUMERS TO LOOK FORWARD TO

The movie theatre industry succeeds when investment and innovation meet a robust slate of diverse films. In particular, PG-rated family fare and horror films excelled in 2025, with more on the way in 2026.

According to NRG, moviegoing for parents with kids aged 4-12 went up from 6 visits to **7.2** over the last 12 months.

Moviegoers aged 13-34 accounted for a dominant **73%** of all horror tickets sold at the North American box office in 2025, per Comscore.

NUMBER OF WIDE* RELEASES PER YEAR



Source: Comscore, Cinema United

PG-RATED WIDE RELEASES



Source: Comscore, Cinema United

WIDE HORROR RELEASES



Source: Comscore, Cinema United



Fans greet characters from *Five Nights at Freddy's 2* at Santikos' Casa Blanca theatre in San Antonio, Texas

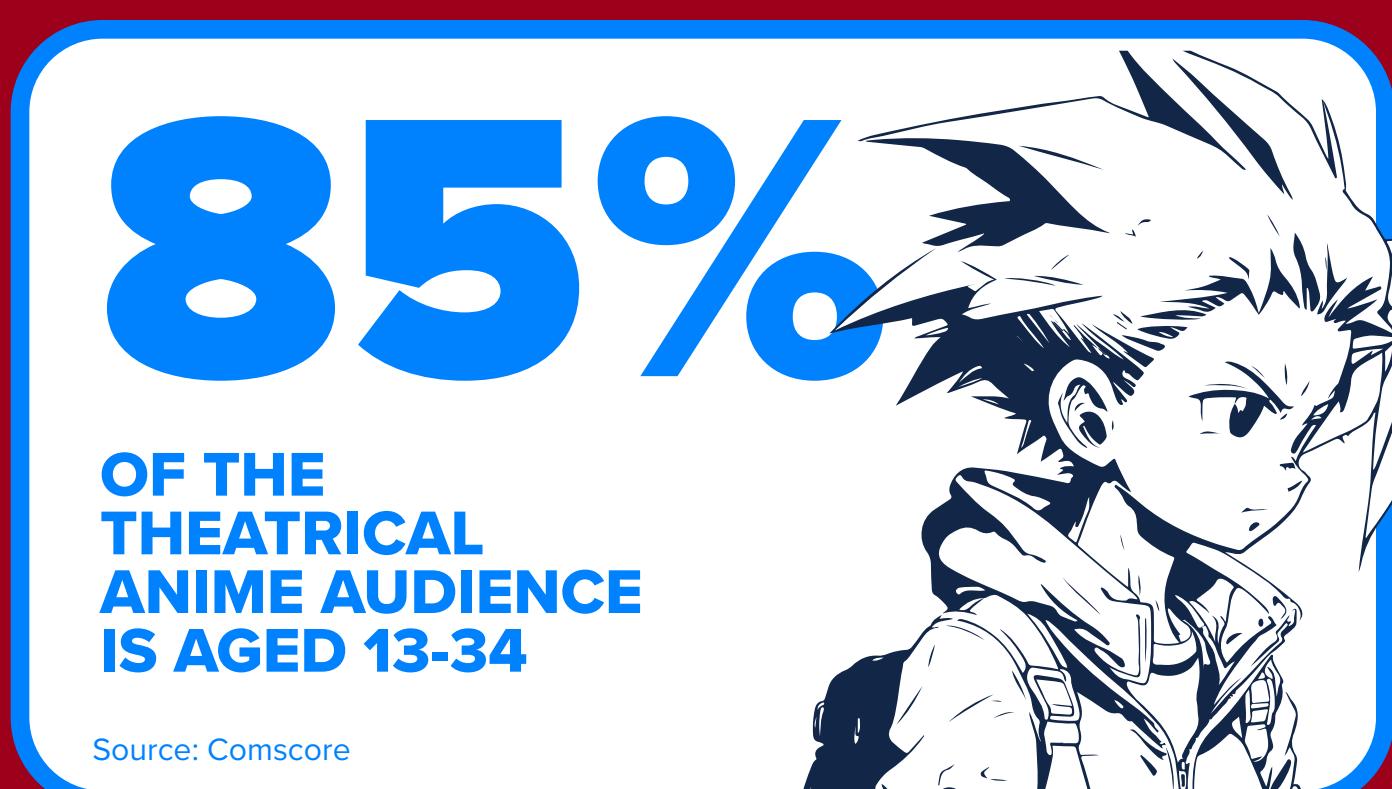
SURGING CINEMATIC GENRES:

HOW MOVIEGOERS ARE RESPONDING TO A GREATER DIVERSITY OF FILMS

Following the success of such films as *The Super Mario Bros.*, *Sonic the Hedgehog*, and *A Minecraft Movie*, distributors are rushing to bring major video game adaptations to theatres.

Another genre with a strong 2025 was anime, achieving two #1 openings in North America this year (*Demon Slayer* and *Chainsaw Man*), with younger moviegoers driving that strong attendance.

A focus on films that young moviegoers want to see is paying off: in 2025, audiences aged 10-24 ranked going to the movies higher than any other activity.



GEN Z IS SHOWING UP: WHY EXPERIENCES MEAN MORE THAN EVER

Movie theatres are making the kind of investments that Gen Z consumers value the most. They are building new, larger screens; installing enhanced sound systems; creating more dynamic food and beverage options; and adding new seats to auditoriums. As a result, Gen Z moviegoers are seeking out movies more often and with greater enthusiasm.

MOVIE FREQUENCY FOR GEN Z

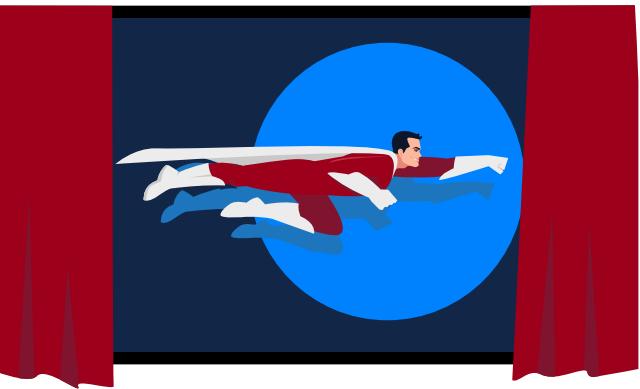


6.1
VISITS PER YEAR

UP FROM 4.9 VISITS
YEAR-OVER-YEAR

Source: NRG's Future of Film Study, August 2025

WHAT DRIVES GEN Z TO THEATRES



Premium large format screens

38%

Ordering food & drinks at your seat

33%

Deluxe/lounge seats

33%

Source: NRG's Future of Film Study, August 2025

GEN Z MEMBERS WHO GO TO THE MOVIES AT LEAST SIX TIMES A YEAR

2025

41%

2022

31%

Source: NRG's Future of Film Study, August 2025



#1

Concessions

23%

Immersive Experience

18%

Source: McKinsey & Company's The Attention Equation Study

CONCLUSION

Theatrical exhibition's significance should never be judged solely on the box office receipts of just one weekend, month, quarter, or year—rather the impact of our industry lies with the people who fill auditoriums all around the world and create community through one-of-a-kind shared experiences on the big screen.

Even in the face of incredible challenges, the future of cinema remains bright as we entertain and connect with the next generation of moviegoers.

As we look to 2026 and beyond, we meet that steadfast enthusiasm with the same kind of investment and innovation as always, focused on the future and poised for even greater success.





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