



2026

IN THE FRAME

Six key trends shaping the media
and entertainment landscape



A word from our CEOs



Jon Penn
CEO, National
Research Group

At NRG, we spend a lot of time thinking about what's next for the entertainment industry: how cultural shifts and technological change reshape the way stories are made, distributed, and experienced. It's often tempting to view each technological innovation and moment of cultural change as steps forward on a simple, linear path to progress.

Reality is never that straightforward. Every major technological leap sparks a cultural countercurrent. The result is not a clean handoff from old models to new ones, but a landscape defined by a series of paradoxes, as new possibilities clash with entrenched habits and behaviors.

As AI becomes more deeply embedded into creative workflows, audiences place greater value on what feels human. As streaming unshackles our media consumption from temporal and geographic constraints, consumers seek

real-world experiences that feel uniquely "of the moment." And as digital life becomes increasingly frictionless, people find renewed meaning in what takes effort.

Understanding what's next isn't about predicting the trajectory of today's platforms and technologies. It's about understanding people: what they'll crave amid abundance, who they'll trust in an age of simulation, where they'll seek joy and connection in a world that often feels like it's changing faster than they can keep up.

That's why we've approached the six trends in this report, first and foremost, through the lens of human behavior. Because, if history tells us anything, it's that audiences lead the way. Technology may set the pace, and industry executives may steer the ship, but it's viewers and fans who determine the ultimate destination.



Sharon Waxman
Founder and CEO,
TheWrap

What any seasoned journalist will tell you is that trying to predict the future is one of our biggest occupational hazards—especially in a media and entertainment world that grows more frenetic by the week.

That said, as chroniclers of the ebbs and flows of our business, we do see around the corners for what's next, spotting trends before and as they are happening.

What you will read here is how technology, cultural shifts and consumer appetites will shape the landscape in the new year in Hollywood and media.

Whether it's the continuing evolution of AI, an IP pushback in film, an embrace of creators, or sports fandom transformed by streaming, the new year promises to be a new inflection point.

Our goal is always to be essential to our readers, especially helping them be smarter about their business. We hope that the analysis, data and survey results you ingest here offer a starting playbook for 2026.

Our news cycle is 24/7 and we are proud of what we deliver all year long minute-by-minute and to be able to share this exclusive, forward-looking research with you, in partnership with NRG.

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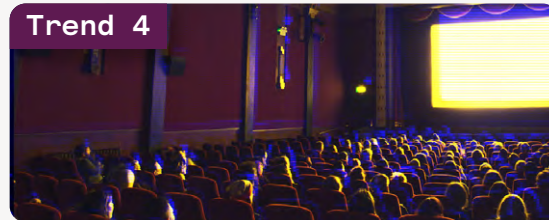
As the entertainment industry enters 2026, it's navigating a moment of profound transition: still adjusting to the rippling effects of the pandemic and the subsequent actors' and writers' strikes, while also attempting to chart a path forward for long-term reengagement with audiences across formats and channels.

This report unpacks six key trends that will define the year ahead, from the rise of content creators as Hollywood power players to the deepening integration of AI into the industry's creative workflows. Taken together, these trends offer a snapshot of a fast changing media ecosystem, and the opportunities it presents for studios, exhibitors, and audiences alike.



The Creator Convergence

The boundaries between Hollywood and the creator economy are dissolving, as studios embrace creators as marketers and talent while social platforms professionalize and move into the living room.



Theatrical Originals Strike Back

After years of franchise dominance, a handful of original films broke through in 2025—and 2026 will test whether that momentum can survive a crowded blockbuster slate.



Hollywood Courts the Heartland

In the aftermath of the 2024 election, studios and streamers are recalibrating toward conservative, rural, and faith-forward audiences, creating new opportunities and igniting cultural flashpoints.



Streaming Expands Sports Fandom

The shift of live sports to streaming is expanding the landscape of fandom, bringing new leagues into the spotlight and fostering a more participatory, digitally driven fan culture.



The AI Wars Intensify

Breakthroughs in generative video are transforming production workflows, even as audiences and creatives remain uneasy about authenticity, labor impacts, and AI's environmental footprint.



Reconnecting with Reality

Consumers—especially younger generations—are pushing back against digital saturation and seeking out immersive, in-person experiences that offer connection, presence, and escape from algorithmic life.

Trend 1

The Creator Convergence

The creator economy and Hollywood are no longer separate worlds; they're rapidly becoming part of the same entertainment ecosystem.

Film and TV studios are increasingly looking to creator platforms as both vital marketing channels and a source of talent, while social video platforms make a push for living room viewing and top creators start to model themselves after movie and TV producers.



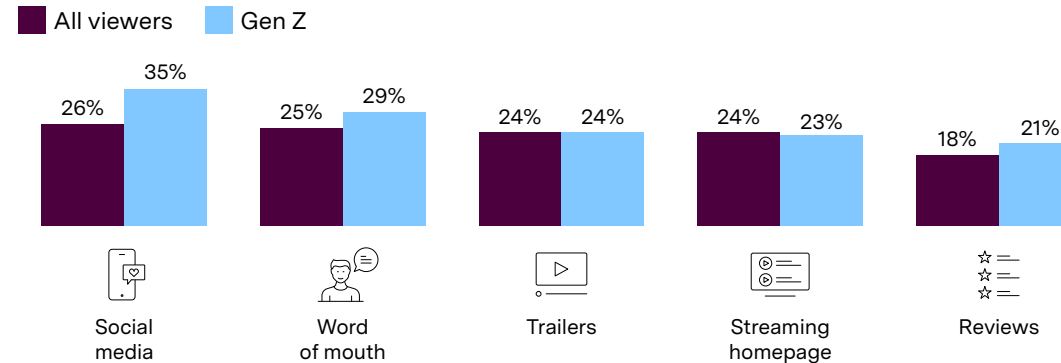
The lines between Hollywood and the creator economy are dissolving fast

For many years, Hollywood and the online creator economy acted as connected but still largely distinct ecosystems: one defined by legacy infrastructure, cultural prestige, and institutional gatekeepers, the other by the radical openness of social video. But lately, that divide has been collapsing. And 2026 might be the year it disappears altogether.

Already, the entertainment industry is deeply reliant on creator-driven platforms as tools for driving engagement with theatrical releases and streaming content.¹ When viewers are settling in to watch a movie on their couch, social media is likely the place they first heard about it. And videos on YouTube and TikTok now hold more sway than any other form of reviews when it comes to helping avid moviegoers decide whether to go and see a new release on opening weekend.

1. Drew Taylor, "Who Needs Critics When You Have Influencers?," TheWrap, October 17th, 2024

Q: How did you hear about the most recent movie you watched at home?



n=3,348 US moviegoers, ages 12 to 74. Survey conducted in August 2025.

The growing cultural sway of creators and influencers has had a transformative effect on the way that movies and TV shows are released and promoted. Fan edits on TikTok, for example, now regularly outperform official trailers. Where studios might once have sought to crack down on the use of unlicensed footage from their movies, these days they're embracing it. Lionsgate, for example, recently created an official partnership program for select fan editors,² while also taking steps to make its IP more accessible to independent creators on Roblox.³

2. Jamie Jirak, "Adapt or die": Professional editors react to Lionsgate hiring TikTok fan creators," Daily Dot, October 31st, 2025

3. Kayla Cobb, "Roblox Opens IP Licensing to All Partners, Letting More Creators Make Games About Top Properties," TheWrap, November 11th, 2025

And stars who would once have spent their time on the press tour giving interviews to print magazines or TV news outlets now flock to YouTube to show off their hot sauce tolerance with Sean Evans or endure an awkward chicken shop date with Amelia Dimoldenberg.⁴ Or they sit down with creators for long-form video podcasts—a format that, arguably, allows them to show off more of their personality and connect more intensely with viewers than they'd be able to through, say, an appearance on late night TV.⁵

4. Kayla Cobb, "Creator-Led Shows Are Filling in the Gaps of Late Night's Decline," TheWrap, November 19th, 2025

5. Kayla Cobb, "Creatorverse: As Late Night is Dying, Podcasting Is Thriving," TheWrap, July 24th, 2025



Most influential sources of movie reviews

Among opening weekend moviegoers

01



YouTube videos

02



TikTok videos

03



Professional critics

04



People I follow on social media

05



Tomatometer on Rotten Tomatoes

06



Podcasts

07



Popcornmeter on Rotten Tomatoes

08



Reddit

09



Letterboxd

*n=3,348 US moviegoers, ages 12 to 74.
Survey conducted in August 2025.*

This shift was on full display in 2025, as Leonardo DiCaprio appeared alongside his co-star Benicio del Toro on Travis and Jason Kelce's *New Heights* podcast to promote *One Battle After Another*.⁶ Joaquin Phoenix, meanwhile, popped up on Theo Von's show to talk about his own political thriller, *Eddington*. Both Phoenix and DiCaprio have made no secret of their general dislike of traditional press interviews; their embrace of this new model speaks to the benefits of a more candid, conversational framework for audience engagement.

2025 was also the year that Netflix began making a concerted push into the podcast space—a signal that the streaming giant sees opportunities for synergy between video podcasts and its core entertainment offerings.⁷ Radio and podcasting networks like iHeartMedia, meanwhile, have shifted their attention away from signing deals with established celebrities in favor of investing in independent creators.⁸ Increasingly, there's a sense within Hollywood that interfacing with the creator ecosystem is no longer optional.

6. Alyssa Ray, "Travis Kelce Can't Believe He Booked Leonardo DiCaprio's First-Ever Podcast, Either," *TheWrap*, September 24th, 2024

7. Tess Patton, "Netflix Bets on Video Podcasts to Capture Even More of Your Free Time," *TheWrap*, November 24th, 2025

8. Tess Patton, "iHeartMedia Launches TikTok Podcast Network, Greenlights Up to 25 New Podcasts from Creators," *TheWrap*, November 10th, 2025



Credit: New Heights/YouTube

These same underlying forces have also created the conditions for prominent voices within the creator economy to make the jump into more “traditional” forms of storytelling—often bringing their hyper-engaged fanbases with them. From *SNL* adding popular TikTokers like Jane Wickline and Jeremy Culhane to its cast,⁹ to auteur directors putting high-profile podcasters in their movies,¹⁰ it’s clear that there are now routes to “mainstream” success and credibility that don’t run through the traditional Hollywood gatekeepers.

9. Sandra Gonzalez, “‘SNL’ announces cast additions, including ‘Please Don’t Destroy’ standout and TikTokers,” CNN, September 2nd, 2025

10. Luke Winkie, “From *Cum Town* to *Red Carpets*,” Slate, October 28th, 2025

Making the jump: creators moving into the mainstream



Stavros Halkias

First building an audience as part of a podcasting trio alongside Nick Mullen and Adam Friedland, Halkias parlayed that success into a stand-up career; a self-released set recording on YouTube in 2022 led to a Netflix special in 2023. In 2024 he co-starred in Netflix’s *Tires*, alongside Shane Gillis—another comedian who honed his stage persona through podcasting. Most recently, he played a major role in Yorgos Lanthimos’ acclaimed *Bugonia*, alongside Emma Stone and Jesse Plemons.



Rachel Sennott

Sennott first broke out through self-deprecating comedy on Twitter and lo-fi character videos on Instagram. That digital momentum carried her into New York’s alt-comedy scene and ultimately into film: after standout performances in *Shiva Baby* (2020) and *Bodies Bodies Bodies* (2022), she co-wrote and starred in 2023’s *Bottoms*. Her HBO series, *I Love LA*—which she writes and produces, as well as stars in—was recently picked up for a second season.



Veronika Slowikowska

Slowikowska built her early following through offbeat sketch comedy on TikTok and Instagram, quickly becoming a mainstay of the platforms’ comedy ecosystems. That success led to opportunities in indie film projects, as well as various recurring TV roles. Her breakout moment came in 2025, when it was announced that she would be joining the cast of *Saturday Night Live*, alongside several other new cast members—such as Jeremy Culhane and Ben Marshall—with deep roots in online sketch comedy.



Vinny Thomas

After starting out as a stand-up comic, the pandemic prompted Thomas to refocus his career around short form video content on platforms like Instagram, TikTok, and Twitter (now X). On these platforms, he’s known for surreal videos, in which he often plays animals, aliens, or other outlandish characters. Since 2021, he’s been a regular contributor to NPR’s *Wait, Wait...Don’t Tell Me!*, and he is currently a recurring cast member on the Apple TV show *Platonic*.



Mark Rober

A former NASA and Apple engineer, Rober built one of YouTube’s most trusted science and engineering channels through imaginative stunt videos and meticulously crafted experiments. Aside from his science content, he’s also well known for his philanthropic partnerships with MrBeast, including the Team Seas and Team Water initiatives. His success on YouTube caught the attention of Netflix: in 2025, he hosted a Christmas special on the platform alongside *Sesame Street*’s Elmo, and in 2026 he’ll be launching his own competition show, produced by Jimmy Kimmel and his own CrunchLabs brand.

As Hollywood makes overtures to creators, social video platforms are transforming to look more like legacy media outlets

Just as the entertainment industry has embraced the creator economy as both a marketing channel and a source of talent, creator platforms themselves have been starting to look more and more like the media outlets they once sought to displace.

Partly, this shift has been driven by changing audience habits, as viewers re-evaluate what counts as “premium” or “TV-worthy” content; more than three-quarters of social video viewers now watch YouTube content on their TVs on at least a weekly basis.

11. Kayla Cobb, “YouTube’s Stellar 2024: An Overnight Success 10 Years in the Making,” *TheWrap*, December 23rd, 2024



Platforms themselves have been actively encouraging this trend. Over the past two years, YouTube has been steadily rolling out features designed to facilitate living room viewing.¹¹ And in 2025, the company completely overhauled its TV app, taking heavy inspiration from existing SVOD services.¹² Instagram has also now launched its own dedicated app for TV viewing.¹³ Interestingly, these developments coincide with a trend among streaming platforms like Netflix for redesigning their UIs to facilitate vertical viewing and scrollable discovery.¹⁴ SVOD and social video are, it seems, rapidly converging on the same cultural territory.

12. Janjo Roettgers, “Inside YouTube’s transformation on your TV,” *The Verge*, October 30th, 2025

13. Kurt Wagner, “Instagram Debuts Dedicated Television App for Amazon Fire TV,” *Bloomberg*, December 16th, 2025

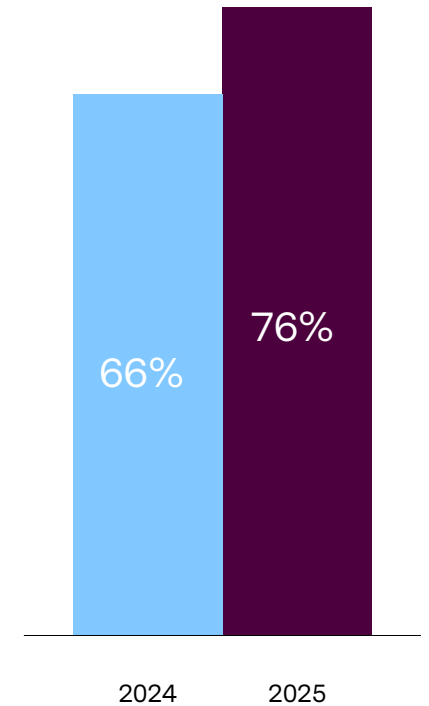
14. Patricia Meliana, “Netflix redesigns discovery with AI: how marketers should respond,” *Content Grip*, May 15th, 2025

Other social platforms have been finding their own ways to adopt the cultural markers and rituals of Hollywood. Instagram recently launched a new awards program for creators on its platform, with Spike Lee on the judging panel.¹⁵ Not to be outdone, TikTok swiftly announced that it was bringing the “TikTok Awards,” pioneered in markets like Germany and South Korea, to the US.¹⁶ Featuring a red carpet reception and a ceremony that will be livestreamed on Tubi, the company is attempting to position these awards as something like the Oscars or the Emmys of online content creation.

15. Aisha Malik, “Instagram introduces new ‘Ring’ award for top creators,” *TechCrunch*, October 6th, 2025

16. Aisha Malik, “TikTok announces its first awards show in the US,” *TechCrunch*, November 3rd, 2025

Social video viewers who watch YouTube content on a connected TV at least once per week



Annual surveys of US social video viewers, n=905 for 2024, n=1,000 for 2025, ages 12 to 54.

Top creators themselves are becoming increasingly professionalized in their approach to content production, adopting Hollywood's playbook in the process. Creators like Michelle Khare¹⁷ and Dhar Mann¹⁸ now operate what are essentially miniaturized versions of film studios, complete with writers' rooms, modular shooting sets, and dozens or even hundreds of permanent staff.

And they're seeking out opportunities to put their content onto larger and larger screens. Tubi recently closed a deal with Hartbeat, Kevin Hart's production studio, to bring four creator-driven feature films to its platform in 2026.¹⁹ And this past September, a tour documentary about the YouTube group Dude Perfect played in Regal Theaters around the world.²⁰

17. Kayla Cobb, "Creatorverse: Creators as Entrepreneurs Are Driving the Industry's Rise," *TheWrap*, September 4th, 2025

18. Tess Patton, "Go Inside Dhar Mann's 125,000-Square-Foot Creator Production Hub," *TheWrap*, September 29th, 2025

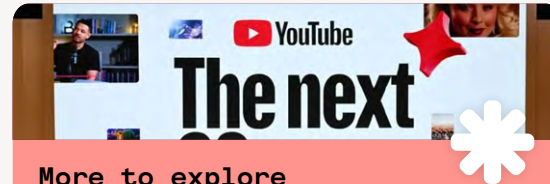
19. Kayla Cobb, "Tubi Partners With Kevin Hart's Hartbeat on 4 Movies from Kinigra Deon, 85 South Show," *TheWrap*, October 29th, 2025

20. "Dude Perfect Partners with Regal Cinemas To Launch 'Dude Perfect: The Hero Tour' Movie In Hundreds of Theaters Worldwide," *Boxoffice Pro*, August 4th, 2025

For whatever reason, horror has proved to be a genre particularly well-suited for creators looking to make the jump from the smallest to the biggest screen. YouTube movie critic Chris Stuckmann made his directorial debut in 2025 with *Shelby Oaks*.²¹ And in 2026, A24 will be distributing *The Backrooms*, a feature length adaptation of a found footage series by 20-year-old YouTuber Kane Parsons, starring Chiwetel Ejiofor and Renate Reinsve.²²

21. Drew Taylor, "How 'Shelby Oaks' Director Chris Stuckmann Made the Jump From YouTuber to Big Screen Filmmaker," *TheWrap*, October 24th, 2025

22. Umberto Gonzalez, "19-Year-Old Horror Influencer Kane Parsons to Direct A24 Movie 'The Backrooms' Starring Chiwetel Ejiofor, Renate Reinsve," *TheWrap*, June 11th, 2025



More to explore

At the company's Made on YouTube event in September 2025, the online video giant outlined plans to provide creators with tools to create premium content that can drive and sustain living room viewing. Read *TheWrap's* coverage of the event to find out more.



Scripted microdramas represent the final melding of legacy and social media

The ongoing convergence between Hollywood and the creator economy also creates space for the emergence of new storytelling formats. Scripted microdramas—bite-sized, serialized narratives designed for binging on vertical video platforms—may represent the ultimate synthesis of these two worlds. These tightly plotted, cliffhanger-driven shows borrow the emotional grammar of traditional TV melodrama, but they're engineered for the rhythms of social video.

In China, where more than 830 million viewers already watch microdramas, the format has become a multibillion-dollar content category supported by hyper-efficient production pipelines, modular sets, and AI-assisted workflows that can take a series from development to release in under two months.²³

23. Tess Patton, "Vertical Micro-Dramas Are an \$8 Billion Business. Hollywood Is Finally Paying Attention," *TheWrap*, October 21st, 2025

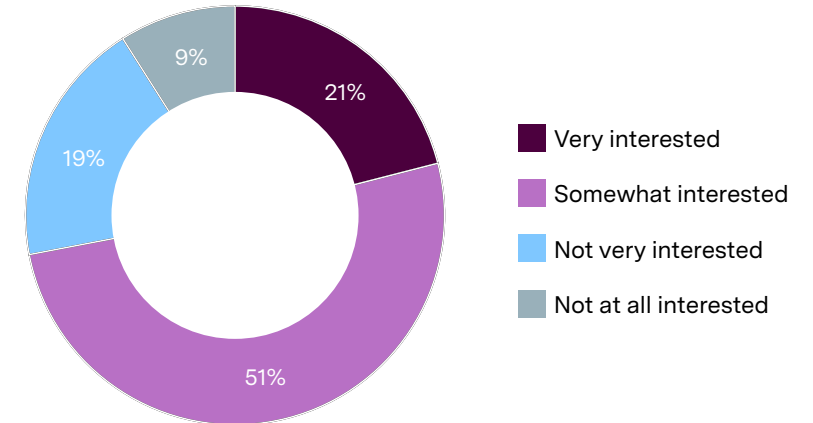


That efficiency—and the format's proven ability to hook audiences—has begun to attract serious interest from US studios. Fox's recent investment in Holywater, a vertical-video production studio, represents one of the first major attempts by a Hollywood player to move from using short-form video as a marketing channel to treating it as an important content format in its own right.²⁴ Meanwhile, SAG-AFTRA's newly announced Verticals Agreement explicitly prepares performers for a future in which vertical storytelling becomes a core part of America's entertainment landscape.²⁵

24. Lucas Manfredi, "Fox Entertainment Takes Equity Stake in Vertical Video Platform Holywater," October 9th, 2025

25. "Turning the Industry on Its Side: SAG-AFTRA Goes Vertical With New Agreement," SAG-AFTRA, October 13th, 2025

Openness to watching scripted "microdramas" on short form video platforms



n=900 US moviegoers, ages 13 to 64.
Survey conducted in August 2025.

Of course, the industry has been burned by vertical video before, as anyone who remembers the saga of Quibi can attest.²⁶ But this time, there's a proven template to work from. And audiences appear ready for this shift: 72% of Americans are at least somewhat interested in watching microdramas. Dedicated microdrama platforms like ReelShort and DramaBox have already topped US app charts, proving the appetite is there—and that American audiences are increasingly willing to explore narrative formats that sit somewhere in between TV and TikTok.²⁷

Currently, these platforms are heavily dominated by romantic dramas, many of which are

26. Katie Baker, "Ultimately, Quibi was the Quickest Bite of All," *The Ringer*, October 22nd, 2022

27. Lucia Moses, "These salacious, bite-sized soaps have become a \$1.3 billion business in the US," *Business Insider*, September 17th, 2025

adaptations of web novels or online comics. But that could shift as investment flows into this content category, bringing in new audiences and broadening the range of stories on offer. As more creators experiment with serialized vertical storytelling, and as more studios take an interest in microdramas, the format looks poised to become another important bridge between creator culture and Hollywood.

In a media landscape defined by shrinking attention spans and rising production costs, microdramas offer something rare: a format that can provide cinematic punch at the speed of social video. And they may be the clearest sign yet that there's no longer a meaningful boundary between Hollywood and the creator economy.

What's Next:**Three storylines
to watch in 2026****TikTok changes hands**

TikTok enters 2026 under a cloud of regulatory uncertainty. The platform's proposed US restructuring—under which its algorithm will be transferred to a consortium of government-approved investors—could prove one of the most consequential media developments of the year.²⁸ If things go smoothly, this process could create new opportunities for US media giants to tap into TikTok fandoms and engage with audiences and creators on the platform.

28. Liv McMahon, "[Trump claims a TikTok deal is done. Who would own it, and how would it work?](#)", BBC News, September 30th, 2025

**The microdrama boom comes into focus**

2026 will be the year US entertainment companies decide whether microdramas are a novelty or the next major content category. We'll see how microdrama platforms adapt the format from its roots overseas to appeal to domestic tastes—and whether streaming giants like Netflix and Amazon feel this is a space worth getting into. And we'll learn whether the monetization models pioneered in China can successfully work in an American context, divorced from the superapps like WeChat that define the Chinese social media ecosystem.

**Video podcasts cement their cultural footprint**

Podcasting looks set to continue its cultural evolution—from the background noise of consumers' commutes to a format that merits multisensory, appointment engagement. In 2026, we'll see the fruits of Netflix's recent deals with Spotify²⁹ and iHeartMedia³⁰ to bring video versions of some of the world's highest-profile podcasts to its platform. YouTube also seems poised to continue supporting the development of creator-fronted, long-form video podcasts. Increasingly, it seems as if video podcasts may be slotting into the niche once occupied by late night TV. Expect more creators to expand their shows into multi-format franchises, and more celebrities to treat these shows as the default venue for shaping the cultural narrative.

29. Henry Goldblatt, "[Netflix, Spotify Forge Video Podcast Deal](#)," Tudum by Netflix, October 14th, 2025

30. Lauren Forristal, "[Netflix doubles down on video podcasts with iHeartMedia deal](#)," TechCrunch, December 16th, 2025

Trend 2

Hollywood Courts the Heartland

A year on from the divisive 2024 election, the entertainment industry finds itself reassessing its relationship with the American heartland. Studios and streamers are making a concerted effort to reach audiences beyond coastal cultural hubs, seeking out stories that resonate with conservative, rural, and faith-forward viewers.

But as American culture becomes increasingly polarized, this outreach creates both opportunities and new fault lines.



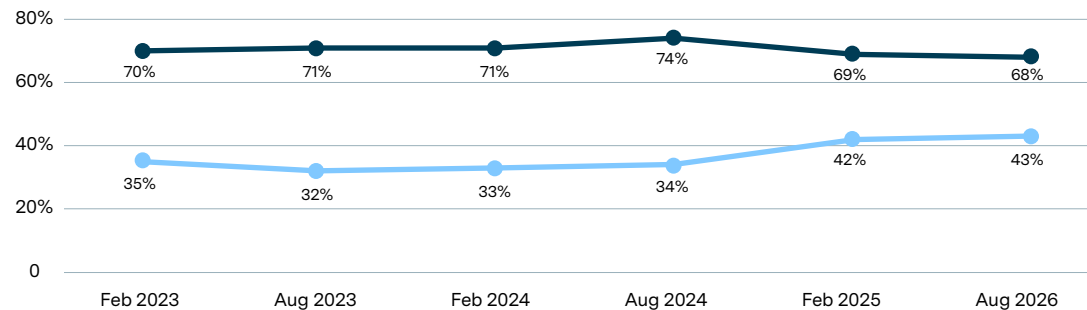
Since the 2024 election, the entertainment industry has been taking steps to reach beyond coastal bubbles

For decades, the entertainment industry has been dogged by accusations that it speaks primarily to coastal, liberal audiences—often overlooking, misunderstanding, or caricaturing the values of the American “heartland.” Those tensions sharpened in the aftermath of the 2024 election, raising an uncomfortable question: does Hollywood really know its audience?

Across NRG’s research, conservative, rural, and middle-American viewers have consistently reported feeling underrepresented in the movies and TV shows produced by major studios. In 2025, however, the mood finally started to shift. Studios began reassessing their relationship with audiences who don’t live in Los Angeles, New York, or other cosmopolitan cultural hubs. **And they increased their investment into stories that speak more directly to audiences who have previously regarded mainstream entertainment with a fair degree of skepticism.** The result: a

Attitudes toward Hollywood among conservative moviegoers

■ Hollywood is too heavily involved in politics ■ Movies do a good job of reflecting my values/beliefs



Biannual surveys of US moviegoers, ages 12 to 74.

small but noticeable uptick in the percentage of conservative viewers who feel that their values and beliefs are well-represented on screen.

Of course, the question of how to define “heartland” audiences is itself a highly contentious one. Too often, this audience is framed as a cultural monolith, or defined by a narrow set of political views or voting patterns. In reality, it’s made up of deeply diverse communities: small towns and mid-sized cities, industrial hubs and farming regions, university towns, immigrant enclaves, suburban corridors, and tribal nations. While these audiences may skew more conservative than coastal viewers, what truly unites them isn’t a singular political

ideology, but a shared set of values that cut across geography and demographics—and a desire for grounded, human storytelling that showcases their lives and communities.

Paramount has been a key trendsetter on this front. Through their partnership with Taylor Sheridan, they’ve produced an entire ecosystem of TV and streaming content that centers the experiences of heartland Americans. 2025 brought us the second and final season of *Yellowstone* spin-off *1923*, as well as the announcement of multiple upcoming shows within the franchise. In 2028, when his TV deal with Paramount expires, Sheridan will be taking his talents to NBCUniversal—a sign that creators



Credit: Paramount Network

who can successfully connect with heartland audiences are increasingly in demand in today’s entertainment economy.³¹

The Paramount/Skydance merger, completed in August 2025, has turbocharged the studio’s efforts. New CEO David Ellison, the son of close Trump ally Larry Ellison, has made no secret of his desire to create content that connects with middle America.³² The studio recently greenlit a movie billed as “a Western version of *Taken*,” and has also been exploring an adaptation of the *Call of Duty* video games.

31. Niall Ridgley, “[What Yellowstone creator’s surprise Paramount exit means for Hollywood](#),” *TheStreet*, November 1st, 2025

32. Hugo Lowell, “[Larry Ellison discussed axing CNN hosts with White House in takeover bid talks](#),” *The Guardian*, November 20th, 2025

A history of the extended Sheridan-verse

Yellowstone and its spin-offs



Yellowstone
2018–2024



1883
2021–2022



1923
2022–2025



Y: Marshals
Coming in 2026



The Madison
The Dutton Ranch
1944
TBD



Mayor of Kingstown
2021–present



Tulsa King
2022–present



Lawman: Bass Reeves
2023



Lioness
2023–present



Landman
2024–present

Other Taylor Sheridan projects

But Paramount is far from the only studio looking to make inroads with these audiences. Amazon has developed a healthy stable of “dad TV,” in the form of shows like *Reacher*, *Jack Ryan*, and *Bosch*.³³ Netflix has been releasing a slew of Westerns and Western-inspired series—including *Ransom Canyon*, *American Primeval*, *The Abandons*, and *Untamed*.³⁴ And Disney is reportedly searching for IP that can effectively lure Gen Z men back to the box office.³⁵

To some, these efforts read as overcorrection. Indeed, 2025 saw a number of controversies related to the relationship between politics and the media. Ellison’s push to reshape CBS News—including through the appointment of Bari Weiss as editor-in-chief—has prompted backlash from some staffers.³⁶ In September, Disney took Jimmy Kimmel’s show off the air following comments the host made about the death of Charlie Kirk—a move that was swiftly reversed following a surge of Disney+ and Hulu cancellations.³⁷ It’s almost inevitable that 2026 will see further flashpoints as media companies attempt to navigate between the conflicting political pressures of the Trump 2.0 era.

33. “With the latest season of *Reacher*, Prime Video is dominating the market for “Dad TV.”” Parrot Analytics, January 12th, 2024

34. Matt Mahler, “Netflix Is Stealing ‘Yellowstone’ Fans with Their New Western Series,” Movieweb, February 18th, 2025

35. Kennedy Felton, “Disney looks to reclaim Gen Z boys as streaming habits shift,” Straight Arrow News, August 23rd, 2025

36. Justin Baragona, “He lied to us: CBS News staffers say new owner David Ellison ‘just can’t be trusted,’” The Independent, September 16th, 2025

37. Adrian Horton, “Disney+ and Hulu cancellation rates doubled after Kimmel suspension,” The Guardian, October 20th, 2025

There's been a proliferation of specialist production companies and distribution platforms targeting heartland audiences

Beyond the confines of mainstream film and TV, specialist production companies and distribution platforms are also finding success by targeting heartland audiences.

Faith-based and faith-adjacent storytelling, long seen as niche, is becoming a more visible part of the entertainment ecosystem. Angel Studios' unprecedented success with *Sound of Freedom* in 2023 set the stage, **but the past two years have seen a wave of investment into Christian-oriented streaming platforms and production companies.** Angel Studios themselves went public in September 2025³⁸—and October saw the launch of faith-based streaming channel Wonder Project on Amazon Prime Video, featuring more than 125 licensed titles, headlined by the platform-exclusive *House of David*.³⁹

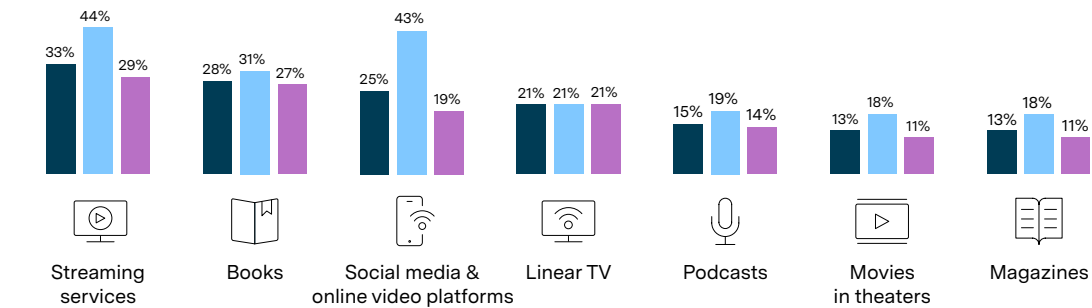
38. James Farris, "How the movie and TV studio behind 'Sound of Freedom' is selling investors on its unorthodox business model," Business Insider, September 13th, 2025

39. Lucas Manfredi, "Wonder Project Streaming Subscription to Launch on Prime Video in October," TheWrap, August 28th, 2025

How America's Christians consume faith-based content

Percentage of Christians who "regularly" consume faith-based content through these channels

■ All Christians ■ Under 35 ■ 35 and above



n=1,000 US Christians who consume faith-based content, ages 18 to 74. Survey conducted in November 2024.

The proliferation of faith-based and faith-adjacent content on streaming platforms has helped to create a new generation of religiously-motivated viewers. NRG's own research on faith-based media has found that Millennial and Gen Z Christians are actually more likely to seek out content with religious themes than older generations.⁴⁰ And they're engaging with this type of media across a wider variety of channels; aside from watching shows like *The Chosen*, they're seeking out faith-first podcasts and finding community with fellow believers on apps like TikTok and YouTube.

40. "Faith, film, and the future: the evolution of Christian content," National Research Group, January 31st, 2025

Other media outlets have attempted to launch their own specialist streaming platforms, blending explicitly faith-based content with more secular material aimed at similar demographics. In 2022, conservative media company The Daily Wire launched its own SVOD platform, DailyWire+, following it up in 2023 with a specialist children's platform called Bentkey. In 2024, the company gave a theatrical release to Matt Walsh's movie *Am I Racist?*, which went on to become the highest grossing documentary of the year.⁴¹ And in January 2026, DailyWire+ will be releasing fantasy epic *The Pendragon Cycle*, their first live-action scripted series.⁴²

41. Josh Rottenberg, "Inside the rise of the conservative movie industry behind 'Reagan', 'Am I Racist?'," Los Angeles Times, January 19th, 2025

42. Amanda Harding, "DailyWire+ Announces Release Date For 'The Pendragon Cycle'," DailyWire+, October 17th, 2025



Credit: Angel Studios



More to explore

Download NRG's *Lights, Camera, Amen* report to learn more about the changing tastes of Christian audiences and the evolution of faith-forward content.

In a politically divided nation, there's an opening for content that brings people together

Ultimately, the media and entertainment industry's post-2024 repositioning and the subsequent backlash exemplified by, for example, audience response to Jimmy Kimmel's suspension, are both symptoms of a deeper truth. We live in a highly polarized era, in which media content is increasingly filtered through the lens of political identity, and where viewers often approach new releases with implicit questions about which "side" they belong to.

Data from NRG's Franchise IQ tracking program illustrates this vividly. Many of the most politically divisive franchises in America today aren't explicitly political in nature. Franchises like *Black Panther*, *Spider-Verse*, and *Scott Pilgrim* resonate more strongly with Democrats, while Republicans gravitate toward action movies like *Rambo* and *Top Gun* and historical epics like *Gladiator*. Even family-friendly brands like *Sesame Street* or nostalgic favorites like *Happy Gilmore* show clear ideological skews. In a divided nation, very little in pop culture feels ideologically neutral anymore.

Media franchises with the most politically skewed fan bases

Select franchises from among those with the greatest gap in popularity between Democrats and Republicans

Democrats show stronger affinity for...



Black Panther



Spider-Verse



Sesame Street



Hamilton



Black Mirror



Scott Pilgrim



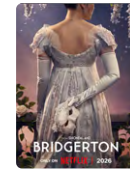
Animal Crossing



Freaky Friday



Knives Out



Bridgerton

Republicans show stronger affinity for...



Happy Gilmore



Rambo



Top Gun



Meet the Parents



Gran Turismo



Jack Reacher



Virgin River



Gladiator



Jackass



The Fast and the Furious

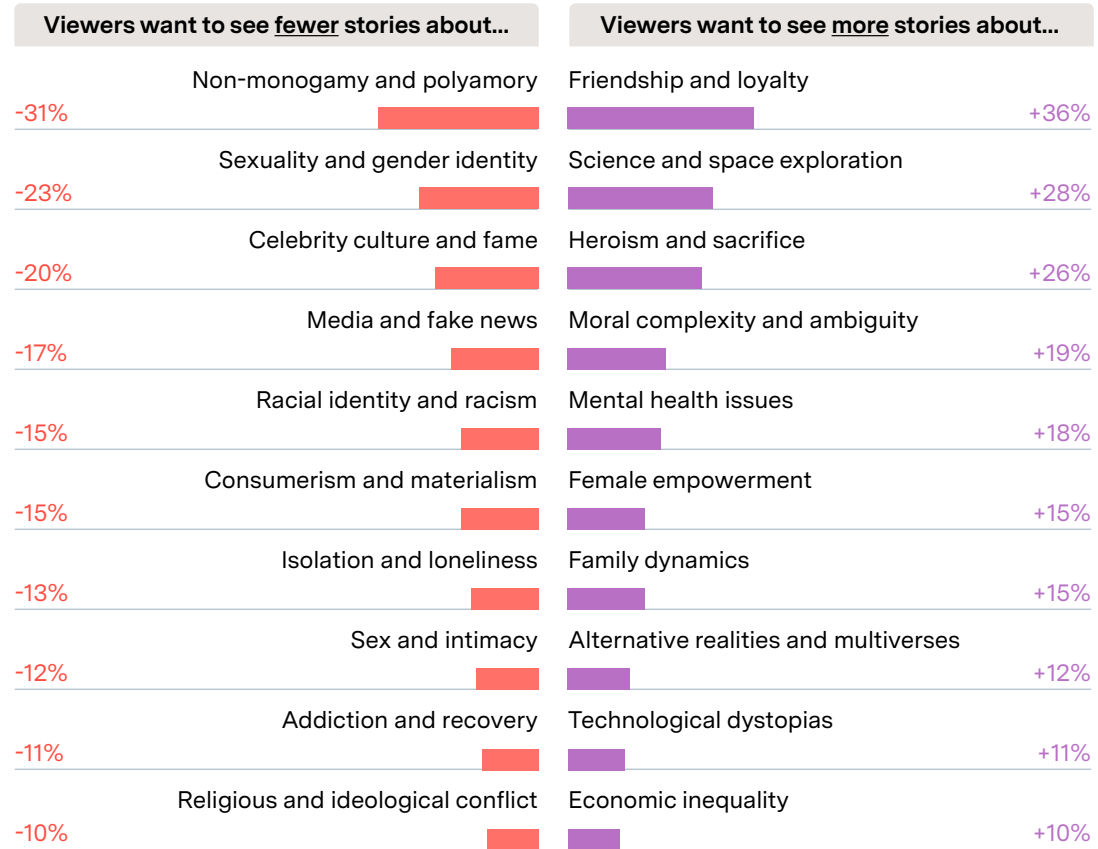
Data from NRG's Franchise IQ research program, based on weekly surveys of US consumers, exploring attitudes toward media franchises across TV, film, gaming, and more.

And yet, when we ask audiences what they want to see more of in the media they consume, a different picture emerges. Viewers across the political spectrum express strong interest in stories about the values and traits that bind the nation together and create a shared sense of common purpose: topics such as friendship and loyalty,

science and space exploration, and heroism and sacrifice. Meanwhile, the topics they generally want to see less of—media and "fake news", sexuality, celebrity culture, for example—tend to be the culture-war flashpoints that dominate headlines and online discourse.

Topics viewers want to see in TV and streaming content

NET: “I want to see more of this” minus “I want to see less of this”



n=3,000 US TV and streaming viewers, ages 12 to 74. Survey conducted in September and October 2025.

Taken together, these findings point toward an under-recognized opportunity: in a moment of unprecedented polarization, there's broad audience appetite for stories that transcend political categorization and speak to universal human concerns. That doesn't mean the industry needs to retreat into blandness or avoid challenging ideas and themes. Rather, it suggests a hunger for narratives rooted in shared values—curiosity, courage, community, and family bonds—rather than overt ideological signalling.

Increasingly, it seems as if audiences are feeling burnt out by the constant fever pitch of contemporary politics. What they're looking for are stories that offer relief from the constant culture war—stories that remind them of what they have in common, not what sets them apart. For the entertainment industry, this represents one of the biggest opportunities of 2026. In an age defined by political tension, the ability to bring people together might just be one of Hollywood's most valuable assets.



What's Next:**Three storylines
to watch in 2026****Media outlets navigate
challenging political headwinds**

With a president who has demonstrated a willingness to put public pressure on media outlets deemed as hostile or unfair to the administration, 2026 may bring a new wave of political skirmishes between the White House and Hollywood. Expect flashpoints around late-night hosts, editorial strategy, and even specific movie releases to become national talking points, as media companies navigate unprecedented pressure to align with—or visibly resist—the administration's expectations.

**Faith-based and conservative
streaming outlets seek their
breakout hit**

With their *Game of Thrones* inspired take on Arthurian Legend, The Daily Wire will be hoping to bring mainstream fantasy fans to their streaming platform. And Wonder Project has its own set of originals lined up for 2026. This could be the year that one of these niche platforms produces a show that finds genuine crossover success—a development that would prompt major studios and streamers to rethink how much of their own slates should cater to faith-forward audiences.

**Streamers and studios look
to bridge cultural divides**

After years of steadily rising political polarization, we should expect to see studios and streaming experiment more aggressively with stories designed to appeal across cultural and political lines. We'll soon see if content decisions made in 2025 have successfully enabled them to reach out to historically overlooked heartland audiences, without alienating other segments.

Trend 3

The AI Wars Intensify

With text-to-video tools maturing at breakneck speed and tech giants making aggressive plays in synthetic media, AI is rapidly becoming a central part of Hollywood's production ecosystem.

But major questions remain about how—and whether—audiences and creatives want it to be used. As viewers wrestle with what “authenticity” means in an age of artificially generated content, 2026 will force studios to define not just what AI can do, but what it should do.



2025 was a landmark year for AI video—but general audiences remain uneasy about the tech’s impact on the entertainment industry

The past year marked a dramatic acceleration in the capabilities of generative AI-powered video tools. Sora 2, the new iteration of OpenAI’s text-to-video model, launched in September, and quickly surged to the top of the US app charts—hitting 1 million downloads even faster than ChatGPT did.⁴³ Google, meanwhile, made its latest video generation model, Veo 3.1, available through its Gemini API and incorporated the technology into the company’s Flow video editor.⁴⁴

For Hollywood, 2025 felt like the moment when AI stopped being hypothetically disruptive and started becoming operationally transformative. In July, Amazon made a high-profile investment in Fable, a platform for user-generated content that bills itself as the “Netflix of AI.”⁴⁵ The tech

43. Sarah Perez, “Sora hit 1M downloads faster than ChatGPT,” TechCrunch, October 9th, 2025

44. Ian Carlos Campbell, “Google’s Veo 3.1 is better at generating videos from images,” Engadget, October 15th, 2025

45. Lucia Moses, “Amazon just funded a streamer that lets you use AI to make your own TV shows. Read its pitch to Hollywood studios,” Business Insider, July 30th, 2025



More to explore

Of all the new AI video gen models, Sora 2 has generated particular interest within the entertainment industry. Read more from The Wrap on how OpenAI’s new model has shifted the balance of power in Hollywood’s relationship with AI.

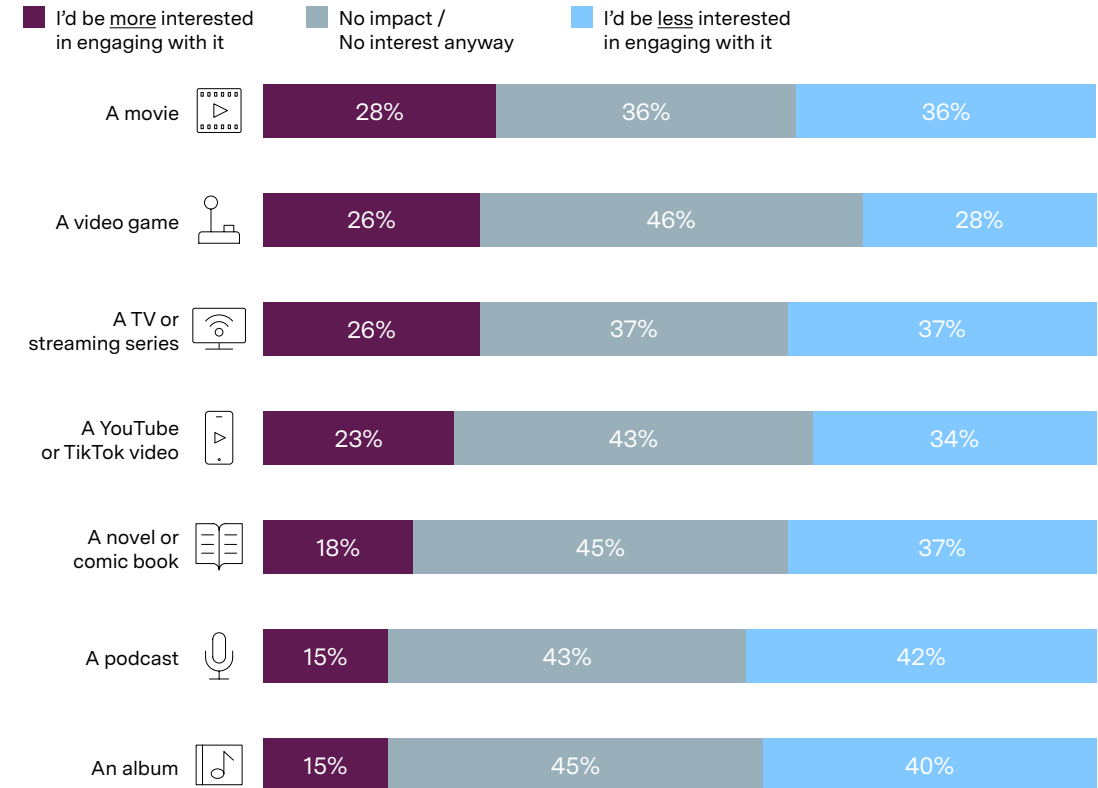
giant is also involved in an ambitious plan to use AI to restore 43 minutes of lost footage from Orson Welles’ 1942 movie, *The Magnificent Ambersons*.⁴⁶ And in May, the founder of FAST streaming service Xumo announced the launch of Fairground, a new studio and streaming platform focused exclusively on AI-generated TV shows.⁴⁷

Not all of these experiments have gone smoothly. Lionsgate, for example, has run into snags with its partnership with Runway AI; the size of the studio’s catalog, combined with copyright and licensing concerns, have made it difficult for the two partners to realize the lofty ambitions they set out in 2024 to create a bespoke, in-house generative AI model to support filmmakers and storytellers.⁴⁸ Disney has been beset by similar challenges in building its own internal AI tools.⁴⁹

46. Andrew Pulver, “AI firm plans to reconstruct lost footage from Orson Welles’ masterpiece *The Magnificent Ambersons*,” The Guardian, September 5th, 2025

47. Thomas K. Arnold, “Xumo Co-founder Colin Petrie-Norris Launches Studio and Streaming Distribution Service Focused on AI-Generated Content,” Media Play News, May 14th, 2025

Q: Would you be more or less interested in engaging with a piece of media if you found out it had been created, in part, by AI?



n=3,500 US entertainment consumers, ages 13 to 64. Survey conducted in November 2025.

48. AJ Dellinger, “Lionsgate Is Finding Out It’s Really Hard to Make Movies With AI,” Gizmodo, September 24th, 2025

49. Roger Cheng, “How Disney’s AI Ambitions Hit a Wall,” TheWrap, November 18th, 2025

Alongside these developments, there's the looming question of whether the technology can or will be deployed in a way that creates real value for audiences and creatives. AI was, after all, a central point of contention during the WGA and SAG-AFTRA strikes of 2023.⁵⁰ And more recent controversies—such as the backlash during *The Brutalist*'s Oscar campaign over the film's use of AI to help Adrien Brody pull off a Hungarian accent—prove that many within the industry are still uneasy about the technology's rapid proliferation.⁵¹

Consumer sentiment reflects this ambivalence. Over a third say that they'd be less interested in watching a movie or a TV show if they found out it was made using generative AI—significantly more than the number who say they'd be more inclined

to watch AI-generated content. While some are excited about the possibility of AI being used to enhance the visuals of new releases or create new opportunities for user-generated content, others fret that AI will lead to content that feels soulless and creatively bankrupt.

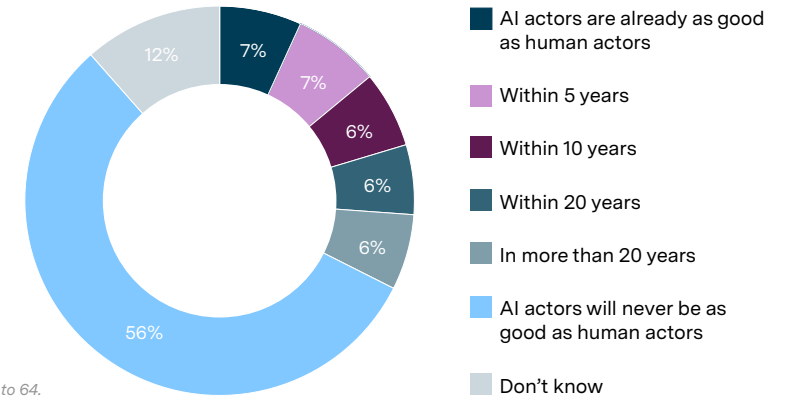
General audiences are also highly skeptical of claims made by some AI firms that we are not far off from a world in which AI “actors” can deliver human-caliber performances. In September 2025, European production studio Particle6 Group unveiled Tilly Norwood, an allegedly “screen-ready” AI actress—prompting a stern response from SAG-AFTRA.⁵² Over half of Americans, however, are unconvinced that AI creations like Norwood will ever be able to perform to the standard of human actors.

50. Regan Morris, “AI was enemy No. 1 during Hollywood strikes. Now it's in Oscar-winning films,” BBC News, March 31st, 2025

51. Chris Murphy, “*The Brutalist*'s AI Controversy, Explained,” Vanity Fair, January 24th, 2025

52. “SAG-AFTRA Statement on Synthetic Performer,” SAG-AFTRA, September 30th, 2025

Q: When do you think AI actors will be able to give a performance comparable in quality to that of a human?



n=3,500 US entertainment consumers, ages 13 to 64.
Survey conducted in November 2025.



Credit: Peter Mountain/Netflix

To unlock the potential of AI, studios will need to demonstrate that it can be an amplifier for human creativity

The American public isn't in principle opposed to consuming AI-generated media. An AI-generated song has already topped a Billboard singles chart.⁵³ On TikTok, Gen Z and Gen Alpha have embraced AI-generated ASMR videos and memes like Italian brain rot.⁵⁴

But when it comes to TV and film, viewers do at least want to know that the right guardrails are in place to ensure that human creativity remains core to the creative process, and that the jobs of actors, writers, and other creative workers aren't put at risk. Currently, over half of streaming viewers believe that the incorporation of AI into production workflows will harm human actors—more than twice the number who think it will benefit them.

53. Laura Molloy, "AI-generated country track 'Walk My Walk' tops US Billboard chart," NME, November 16th, 2025

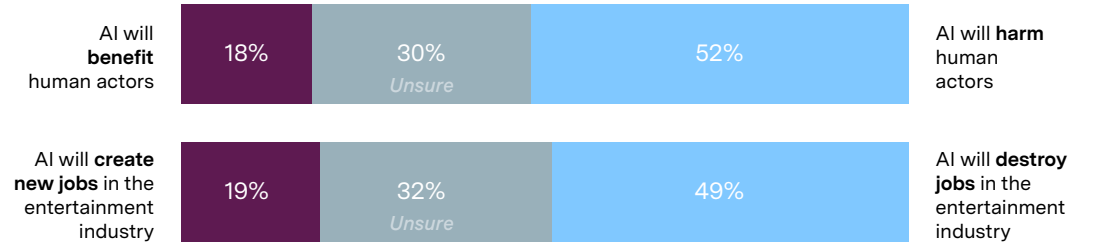
54. Elle Hunt, "From Chimpanzini Bananini to Ballerina Cappuccina: how gen alpha went wild for Italian brain rot animals," The Guardian, June 25th, 2025

This dynamic reflects broader trends that have emerged from NRG's recent research on public attitudes toward AI. Most Americans aren't dogmatically pro or anti AI. Instead, their views tend to be nuanced. They're aware of the benefits of the technology, while also being concerned about the potential for misuses and the risk of automating away people's jobs.

When AI can be framed as an amplifier for human creativity rather than a replacement for it, audiences are far more receptive. They're broadly comfortable with the idea of AI being used to generate special effects, help fill in otherwise impossible crowd scenes, or even edit scripts originally drafted by human writers. These are the kinds of applications that feel additive: ways of expanding what's possible and making a movie's budget stretch further.

Skepticism sets in, however, whenever AI appears poised to take over the parts of the creative process viewers consider most essentially "human." The idea of fully synthetic actors—or AI being used to replicate the voices of deceased celebrities—remains unsettling to most Americans. Likewise, almost three in five believe it would be unacceptable for a studio to put out a movie where the script was written from scratch by an AI.

Q: How do you think AI will impact the entertainment industry?



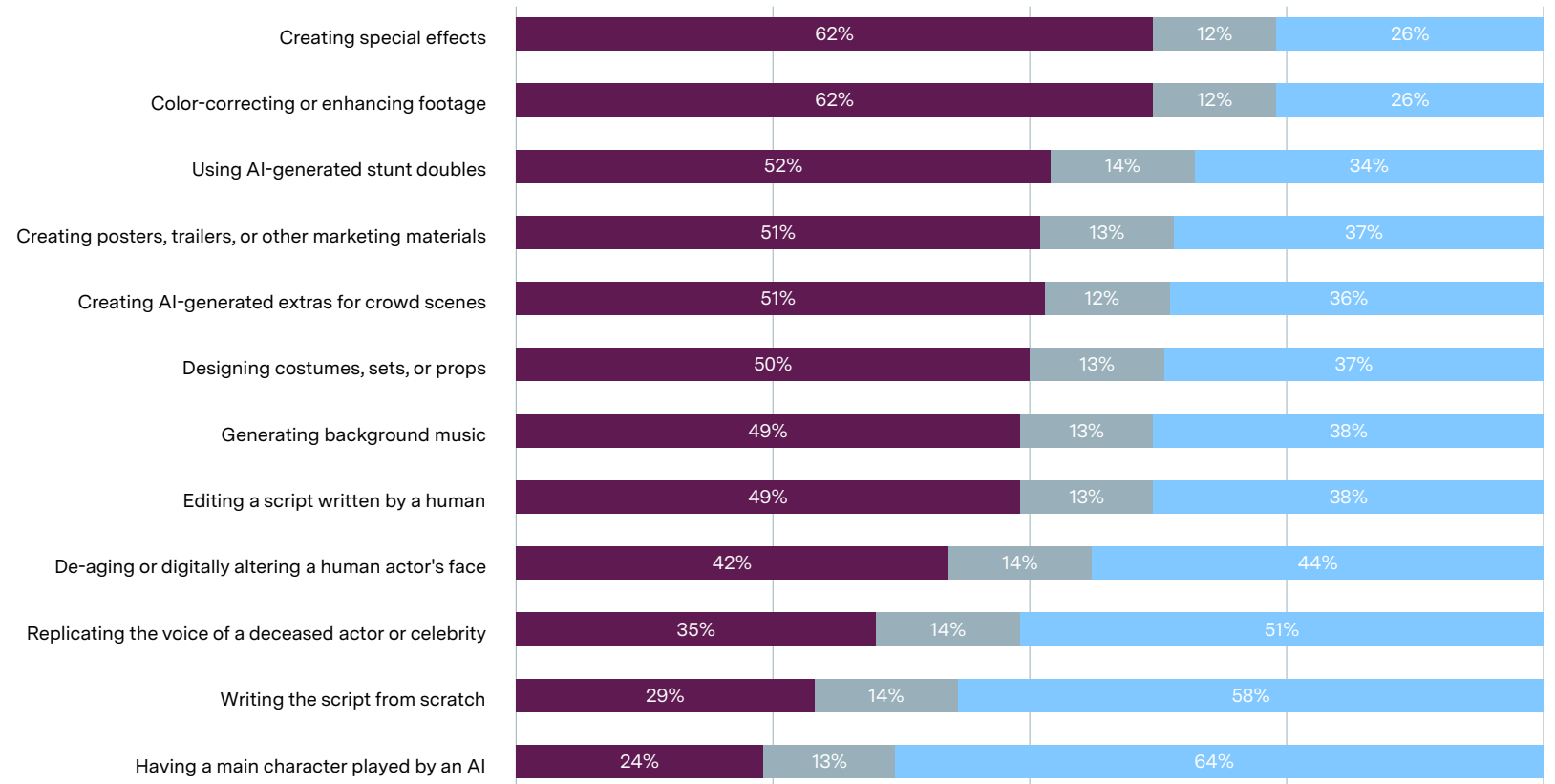
n=3,500 US entertainment consumers, ages 13 to 64. Survey conducted in November 2025.



Heading into 2026, studios that communicate clearly about how they're using AI—and why—will have an advantage. Transparency around guardrails, creative oversight, and labor protections will be essential for maintaining public trust as the technology becomes more deeply embedded into production pipelines. And the companies that can demonstrate, through their output, that AI is enabling richer worlds and more ambitious storytelling without devaluing human contributions will be the ones most likely to win over skeptical viewers.

Q: How do you think movies and TV shows should use generative AI?

■ Acceptable ■ Unsure ■ Not acceptable



n=3,500 US entertainment consumers, ages 13 to 64. Survey conducted in November 2025.

In 2026, we can expect to see generational and political divergence in attitudes toward AI

One of the major shifts in public attitudes toward AI in 2025 has been the gradual polarization of public attitudes toward AI around generational and political lines.

Until recently, AI was the rare topic where consumers' opinions didn't map neatly onto partisan divides.⁵⁵ But lately, that appears to be changing. And much of that shift can be attributed specifically to growing public anxiety about AI's environmental footprint.⁵⁶

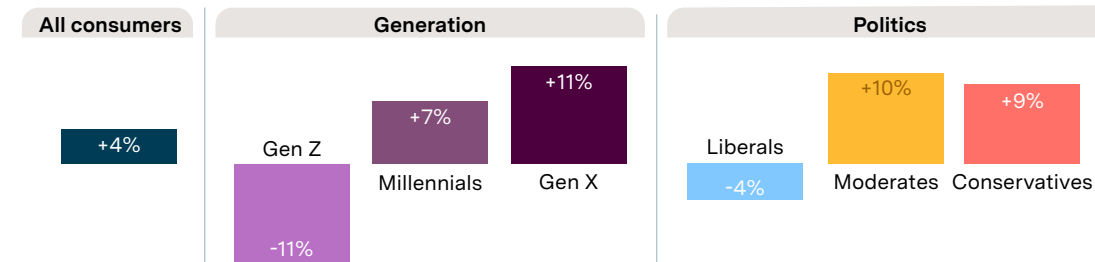
2025 was the year that concerns about the energy demands of model training and the resources required for data center expansion entered the mainstream discourse. Environmental advocacy groups began highlighting the discrepancy between tech companies' sustainability pledges and the accelerating resource requirements of large-scale AI development. And media outlets ran numerous stories about the strain that new data center development has started to place on

55. "Where consumers currently stand on AI regulation," National Research Group, June 13th, 2024

56. "The Sustainability of AI: What Consumers Believe About the Sector's Environmental Impact," National Research Group, November 18th, 2025

Consumer attitudes toward AI's impact on the environment

NET: "AI will have a positive impact on the environment" minus "AI will have a negative impact on the environment"



n=1,000 US consumers, ages 18 to 64. Survey conducted in September 2025.

the water resources of the communities in which these facilities are being built.⁵⁷

High-profile celebrities have waded into the debate as well; in an Instagram post, the singer SZA begged fans not to use AI to replicate her likeness or voice, claiming that "[people] are dying from...the pollution AI energy centers are creating."⁵⁸

When asked whether AI will have a positive or negative impact on the environment, the public is deeply split, with younger and left-leaning viewers significantly more likely to believe AI will harm the planet, and older and more conservative viewers more likely to see potential environmental

57. Michelle Fleury and Nathalie Jimenez, "I can't drink the water" - life next to a US data centre," BBC News, July 10th, 2025

58. Larisha Paul, "SZA Calls Out Destructive AI Usage: 'Environmental Racism' is the 'Price for Convenience,'" Rolling Stone, July 16th, 2025

upside through efficiency gains or the use of the technology to help unlock new breakthroughs in green technology. Recent polling by Gallup has found a similar political divide emerging around the national security implications of AI.⁵⁹

The result is a landscape in which attitudes toward AI are more diverse than ever, increasingly filtered through consumers' identity, ideology, and personal value systems. For Hollywood, this means AI-driven projects will not be judged in a vacuum. They'll be interpreted differently by different segments of the audience, with the same innovation inspiring excitement for some viewers and distrust for others.

59. Benedict Vigers and Justin Lall, "American Views on AI, National Security in 5 Charts," Gallup, October 6th, 2025



What's Next:

Three storylines to watch in 2026



OpenAI breaks new ground with the first AI-generated animated feature

At Cannes, OpenAI plans to debut *Critterz*, the first feature-length animated movie created using the company's generative AI tools.⁶⁰ Reportedly, the movie has taken just nine months to write, storyboard, and animate, against a budget of less than \$30 million. If it does well, it could open the floodgates, radically transforming production timelines and workflows for animation.

60. Robert Hart, "OpenAI comes for Hollywood with *Critterz*, an AI-powered animated film," *The Verge*, September 8th, 2025



IP and rights frameworks begin to take shape

The proliferation of AI text-to-video tools—headlined by OpenAI's Sora—has put rightsholders in a difficult position. On the one hand, they'll want to prevent their characters from showing up in inappropriate contexts; but many will be reluctant to stifle fan creativity or discourage public engagement with their franchises. OpenAI has already unveiled plans to give content owners more granular controls over how their property shows up in Sora-generated content.⁶¹ And Disney recently announced a landmark licensing deal, giving Sora users access to more than 200 characters from the company's franchises—a move which could pave the way for further partnerships between AI platforms and major media brands.⁶²

61. Roger Cheng, "OpenAI's Sora 2 Stresses Hollywood's Uneasy Alliance With AI," *TheWrap*, October 8th, 2025

62. "The Walt Disney Company and OpenAI reach landmark agreement to bring beloved characters from across Disney's brands to Sora", OpenAI, December 11th, 2025



AI presenters begin finding work

Tilly Norwood may have hogged the headlines in 2025, but she's far from the only AI-generated personality on the scene. On social video platforms, brands have begun launching "virtual influencers" as ambassadors for their products.⁶³ Startups like Inception Point AI are publishing thousands of podcasts with AI hosts every week.⁶⁴ And in October, FastStream Interactive announced plans to add segments featuring AI-generated presenters to its interactive TV music channel, ROXi.⁶⁵ Most likely, niche channels and smaller FAST services will be the key early test beds for this type of content, before we start to see fully AI-generated performers show up on major broadcast, cable, or SVOD platforms.

63. Jasmine Williams, "The rise of virtual influencers: are they here to stay?," *Sprout Social*, August 15th, 2025

64. Tess Patton, "An AI Podcasting Machine Is Churning Out 3,000 Episodes a Week—and People Are Listening," *TheWrap*, November 17th, 2025

65. Jenny Priestley, "Thank you for the music? First AI-generated music TV presenters to debut in UK, US," *TVBEurope*, October 7th, 2025

Trend 4

Theatrical Originals Strike Back

For years, Hollywood's risk calculus has favored the familiar: interconnected franchises, recognizable heroes, and established IP. But 2025 forced the industry to reevaluate those assumptions, as a small handful of truly original titles not only held their own but outperformed expectations at the box office.

With 2026 bringing one of the most crowded franchise slates in recent memory, the industry now finds itself testing whether audiences are truly ready to embrace something new, or whether nostalgia will continue to dictate the cultural agenda.



After more than a decade of franchise dominance, 2025 featured some encouraging box office wins for original movies

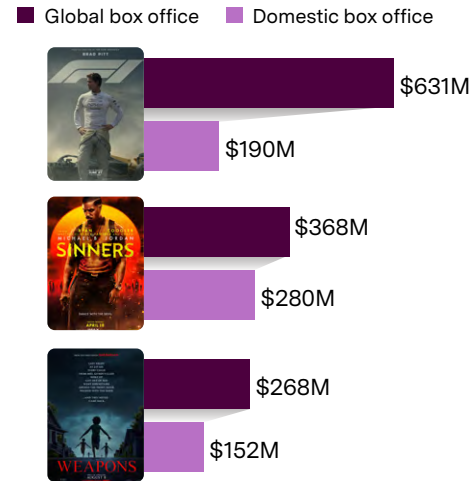
For much of the 2010s and early 2020s, the movie landscape was dominated by sequels, reboots, and cinematic universes—reliably bankable properties that studios leaned on to mitigate risk in an increasingly unpredictable theatrical environment. Of the 60 top-performing theatrical releases between 2016 and 2024, only five were true originals, disconnected from any pre-existing IP or previous franchise installments.⁶⁶

But in 2025, we saw inklings of a shift in direction. A cluster of wholly original films managed to break through with audiences, delivering results that surprised even seasoned industry analysts.

Apple Studios' *F1*, distributed by Warner Bros., brought in \$631 million at the global box office, earning it a spot in the top 10 highest-grossing films of the year and becoming the biggest

66. Allie Canal, "1 chart shows why Hollywood produces so many sequels," Yahoo! Finance, March 3rd, 2024

Highest-grossing original movies in 2025



Source: BoxOfficeMojo. Box office totals accurate as of December 2025.

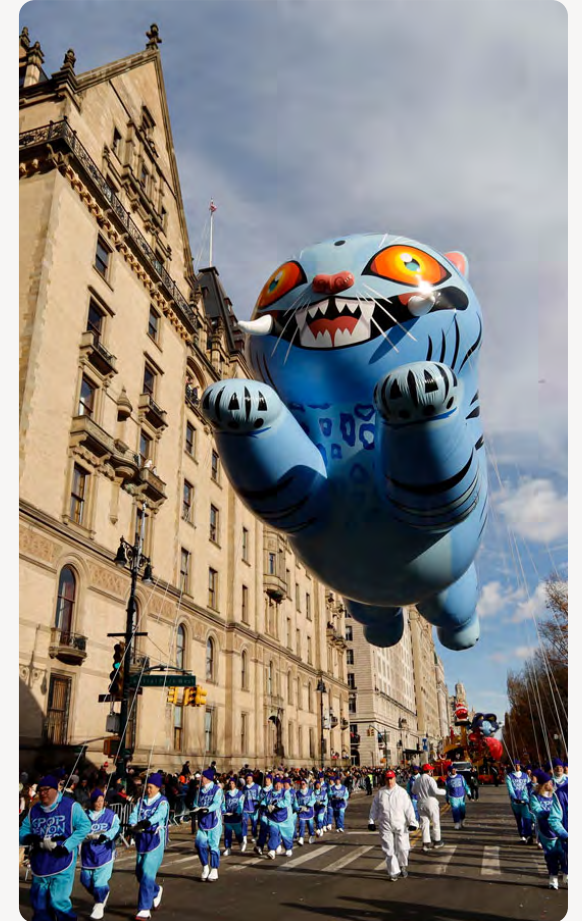
moneymaker of Brad Pitt's career. Meanwhile, Ryan Coogler's *Sinners* and Zach Cregger's *Weapons* proved that audiences are still willing to show up for fresh and stylish auteur-driven pictures. Even Paul Thomas Anderson's challenging social thriller, *One Battle After Another*, crossed the \$200 million threshold: small by blockbuster standards, but easily the highest-grossing movie of PTA's career.⁶⁷

67. Jeremy Fuster, "One Battle After Another Begins Its Titanic Box Office Challenge With \$22.4 Million Opening," TheWrap, September 28th, 2025

To be clear, franchises and cinematic universes still dominate the market. But even so, the success of some of these titles has sparked renewed interest within the industry in developing fresh IP and investing in talented up-and-coming filmmakers with distinctive voices. For comparison: in 2024, the top 20 at the domestic box office was composed entirely of movies that were either franchise installments or adaptations of existing IP, and featured just two book adaptations that weren't connected to an existing cinematic universe (*The Wild Robot* and *It Ends with Us*).⁶⁸

And it wasn't just in theaters that originals found success in 2025. Netflix's *KPop Demon Hunters* was one of the most surprising hits of the year; despite a low-profile release, it eventually went on to become the most-watched Netflix original in the platform's history.⁶⁹ Its success even prompted Netflix to give a limited theatrical release to a singalong edit of the movie in August, and then again in October/November.⁷⁰

The success of *F1* and *KPop Demon Hunters* both speak to an emerging trend within the entertainment industry: hybrid movies that are technically original IP, but which still seek to tap into a pre-existing fanbase. In the case of the former, Warner Bros. and Apple hoped to capitalize on the growing popularity of Formula 1 among American sports fans; the latter, meanwhile, spoke to younger audiences' fascination with Korean music and culture.



68. "Domestic Box Office For 2024," BoxOfficeMojo

69. Peter Hoskins, "Kpop Demon Hunters becomes Netflix's most viewed film ever," BBC News, August 27th, 2025

70. Shaurya Thapa, "KPop Demon Hunters' singalongs are back in cinemas for Halloween - here's how to get tickets," TimeOut, October 30th, 2025

Increasingly, moviegoers are saying they want to see fresh ideas and standalone stories

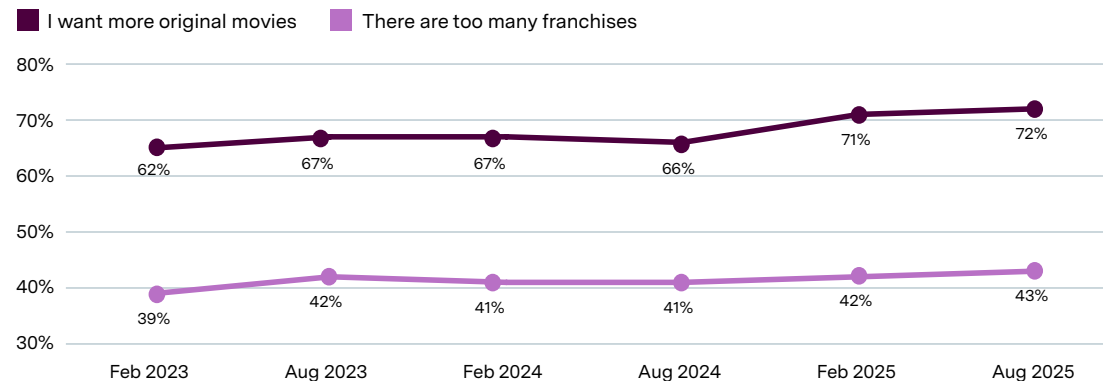
Viewers' growing interest in original movies also reflects an emerging sense of "franchise fatigue." Many of Hollywood's "mega franchises" have struggled to maintain the momentum they built up in the 2010s. Superhero movies, in particular, have suffered due to cultural overexposure. Neither of this year's tentpole releases—*Superman* and *The Fantastic Four: First Steps*—managed to gross more than \$650 million. While their tallies would be impressive in a vacuum, it's clear that audiences' tastes have moved on from the days when MCU movies were regularly smashing box office records.

Franchises targeted toward a younger demographic have proved more bankable of late. 2024 was the first year in decades in which PG movies outperformed all other ratings at the global box office.⁷¹ And many of the biggest success stories of the post-pandemic era—titles like *Moana 2*, *Inside Out 2*, *A Minecraft Movie*, and *The Super Mario Bros. Movie*—have been

71. Ben Cohen, "Hollywood is Reeling—and PG Movies Have Never Been So Popular," *The Wall Street Journal*, November 21st, 2025

Viewer sentiment on franchises and originals

Percentage who agree with these statements



Biannual surveys of US moviegoers, ages 12 to 74.

movies geared for family viewing. In many cases, these are titles that invite parents to pass on the affection they have for the franchise to a new generation of viewers.

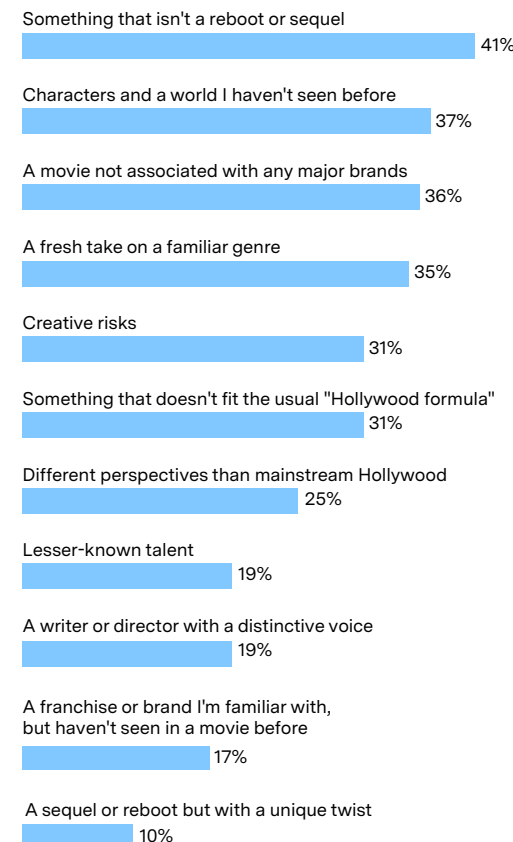
Consequently, studios with rich libraries of kid-friendly IP have been exploring opportunities to leverage it through sequels, spin-offs, and live action remakes. But even these kinds of adaptations are no longer a safe bet: for every live action *Lilo & Stitch* or *How To Train Your Dragon*, there's a *Snow White* that fails to live up to expectations.

Recent surveys of American moviegoers reinforce this sentiment. Viewers are more likely than they

have been in years to express dissatisfaction with the number of franchise releases in theaters. More than seven in ten, meanwhile, say that they want studios to invest more in standalone stories, develop fresh IP, and take more inventive creative swings.

For viewers, "originality" isn't just about movies being able to stand on their own two feet without the backing of a larger franchise or cinematic universe. When asked what they expect from a film described as "original," moviegoers also point to things like creative risk-taking, fresh takes on familiar genres, and characters and worlds that offer something they've never seen on screen before.

Q: What would you expect to see in a movie described as "original?"



n=3,348 US moviegoers, ages 12 to 74. Survey conducted in August 2025.

In 2026, we'll see if originals can hold their own against a crowded franchise slate

It's worth noting, however, that originals like *F1*, *Sinners*, and *Weapons* also benefited from being released during a relatively fallow year for the major franchises—one in which a good portion of the highest-profile releases, including *Zootopia 2*, *Wicked: For Good*, and *Avatar: Fire and Ash*, were clustered together in Q4.

By contrast, the year ahead brings one of the most crowded franchise slates in recent memory. New installments in major series—including *Star Wars*, *Mario*, *Toy Story*, *Moana*, *Minions*, *The Hunger Games*, and *Dune*, to name just a few—look likely to dominate the cultural conversation throughout most of the year.⁷² We'll be getting a new *Spider-Man* movie—arguably, the world's most bankable superhero⁷³—as well as *Avengers: Doomsday*, the first new *Avengers* title since 2019's *Endgame*, still the second-highest grossing movie of all time.

72. Ryan Scott, "2026 Could Be One Of The Biggest Years Ever At The Box Office - Here's Why," *Slash Film*, June 19th, 2025

73. J.A.M., "Spider-Man Is Pop Culture's Greatest Superhero, And Marvel Is Ready To Own That," *ScreenRant*, March 5th, 2025

High-profile originals on the slate for 2026

Includes book adaptations and biopics that are not part of an existing movie franchise

							
<i>Wuthering Heights</i>	<i>GOAT</i>	<i>Hoppers</i>	<i>Project Hail Mary</i>	<i>Michael</i>	<i>Disclosure Day</i>	<i>The Odyssey</i>	<i>Hexed</i>
Warner Bros. Pictures	Sony	Pixar	Amazon MGM	Lionsgate	Universal Pictures	Universal Pictures	Walt Disney Animation
Feb 13	Feb 13	Mar 6	Mar 20	Apr 24	Jun 12	Jul 17	Nov 11

For original films, that creates a formidable challenge: how do you stand out when the calendar is packed with brand juggernauts? That tension between original stories and franchise IP is therefore shaping up to be one of the major storylines of 2026. If 2025 marked a moment of franchise fatigue—however slight—2026 will tell us whether that fatigue has real staying power.

Still, despite the abundance of franchise offerings, 2026 will also feature a slate of high-profile originals that could capitalize on the momentum from 2025. Disney, Pixar, and Sony all have animated originals on their slates in the form, respectively, of *Hexed*, *Hoppers*, and *GOAT*. It's been a rough few years for animated originals—Disney's *Wish* (2023) and Pixar's *Elio* (2025) both

struggled at the box office—but these studios will all be hoping that the success of *KPop Demon Hunters* can be replicated in a theatrical context.

The year ahead will also see some big live action swings from established creative luminaries. In June, Steven Spielberg will make his return to sci-fi storytelling with *Disclosure Day*—a UFO movie penned by *Jurassic Park* screenwriter David Koepp.⁷⁴ And if we broaden the definition of originals to include literary adaptations, then Christopher Nolan's *The Odyssey*, Emerald Fennell's *Wuthering Heights*, and Lord and Miller's *Project Hail Mary* also enter the frame as major releases to pay attention to.

74. Jeremy Fuster, "John Williams Teams With Steven Spielberg for 30th Time to Score Upcoming UFO Movie," *TheWrap*, October 28th, 2025



Credit: Netflix

All eyes will be on Nolan in particular to see whether or not he can replicate the success of 2023's *Oppenheimer*. Early signs are encouraging; the movie has set records already by selling out IMAX screenings a full year in advance.⁷⁵

If even a few of these films break through amid a crowded release calendar, it could signal a meaningful long-term shift in audience appetites—one that would embolden studios to widen the aperture for what they consider "safe" bets. If not, the gravitational pull of franchises may increase even further. Ultimately, 2026 won't just be a test of individual titles; it will be a referendum to determine whether the green shoots of 2025 were an anomaly, or the early sign of a slow but significant rebalancing between original ideas and legacy IP.

75. Sian Cain, "First tickets to Christopher Nolan's *The Odyssey* sell out - a year before its 2026 release," *The Guardian*, July 18th, 2025

What's Next:

Three storylines to watch in 2026



The box office viability of animated originals is put to the test

After several shaky years for original animation, 2026 will be pivotal in determining whether it's still possible to successfully launch an animated all-ages franchise in theaters. Movies like *GOAT*, *Hoppers*, and *Hexed* will test whether families and young adults will show up for animation that isn't rooted in a familiar IP. With the oldest members of Gen Alpha now entering their teenage years, there's a real opportunity to speak to them with original animated franchises that their generation can feel a unique sense of ownership over.



Christopher Nolan's *The Odyssey* reaches its destination

Although *The Odyssey* is technically an adaptation, its scale, ambition, and auteur pedigree position it squarely within the category of "original-feeling" movies. And Nolan is one of the few filmmakers working today whose name alone can turn a non-franchise project into a global tentpole. If the movie lives up to expectations, it could further incentivize studios to place big bets on originals driven by a singular creative vision, be it from an established auteur or a bold up-and-comer. It may also prompt a revival of the "sword and sandals" historical epic, encouraging storytellers to mine the global literary canon for public domain IP that could speak to the needs and values of contemporary audiences.



The MCU sets out to recapture the magic of the 2010s

On the franchise side of the equation, one of the biggest question marks of the year will be the performance of *Avengers: Doomsday* in December. With the Russo brothers bringing back Robert Downey Jr. and finally integrating the cast of the Fox *X-Men* movies into Marvel's primary theatrical universe, it's clear that Disney is pulling out all the stops in an effort to create a worthy follow-up to 2019's *Endgame*.⁷⁶ The road to get here hasn't always been a smooth one, but the movie's performance could dictate the long-term trajectory of the entire superhero genre.

76. Eric Diaz, "Everything We Know About Avengers: Doomsday," Nerdlist, September 8th, 2025

Trend 5

Streaming Expands Sports Fandom

Streaming has upended the logic of live sports. Once the final bastion of cable, sports have become a central battleground for the streaming giants.

Beyond simply changing where audiences watch games, this trend has reshaped the landscape of sports fandom itself—expanding the range of sports and leagues that Americans pay attention to, and

helping to cultivate a new generation of fans for whom fandom is inherently participatory.

As streaming cements itself as a go-to destination for live sports, the industry faces a pivotal year: one in which the balance of power between leagues, networks, and platforms may be permanently altered.



The streaming revolution has radically changed how Americans watch sports

During the early phases of the streaming revolution, live sports remained one of the final anchors of traditional television: a form of content that resisted the pull of cord-cutting and kept millions of households tethered to cable bundles. But in the last few years, that center of gravity has shifted dramatically. **Streaming platforms have invested heavily in sports rights and live broadcast infrastructure, transforming both where and how Americans watch sports content.**⁷⁷

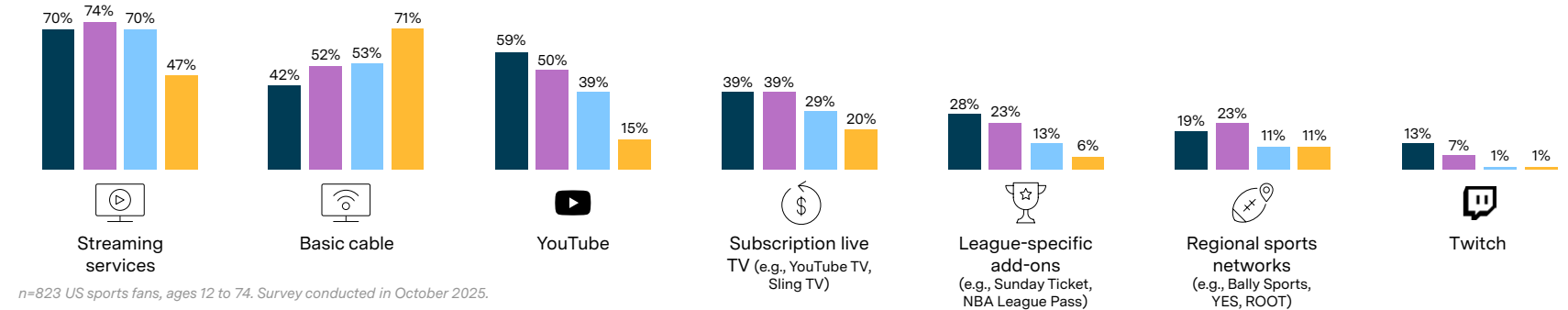
This shift accelerated in 2025. For the first time in its history, YouTube livestreamed an NFL game for free, drawing 17.3 million global viewers and setting platform records for concurrent viewership.⁷⁸ Netflix continued expanding into live sports and spectacle programming, acquiring the rights to the 2026 World Baseball Classic in Japan, adding to a sports roster that already included WWE Raw and the NFL's annual Christmas Day games.⁷⁹ Paramount recently

77. Josh Sim, "Global sports media rights spend to surpass US\$78bn in 2030," SportsPro, November 25th, 2025

78. Jonathan Rest and Ida Wood, "Global NFL bow sets live stream record for YouTube," SportBusiness, September 8th, 2025

Q: How do you watch live sports?

■ Gen Z ■ Millennials ■ Gen X ■ Boomers



closed a \$7.7 billion deal for the broadcast and streaming rights for UFC, ending the league's current pay-per-view model.⁸⁰ And Apple secured a five-year media deal with F1, signalling that tech leaders are ready to stake long-term claims on the category.⁸¹

As well as snapping up the rights to existing leagues, streaming platforms are also putting on their own events. In 2024, Netflix hosted a controversial boxing match between influencer Jake Paul and former heavyweight champion Mike Tyson; now, they're following it up with a highly

79. "Netflix to become Japan's exclusive home for '26 World Baseball Classic," MLB, August 25th, 2025

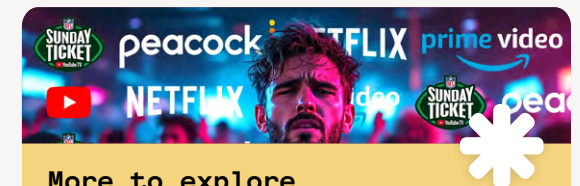
80. Mark Sweeney, "Paramount pays \$7.7bn for exclusive US rights deal with UFC," The Guardian, August 11th, 2025

81. Andrew Benson, "Apple wins US F1 TV rights in \$750m deal," BBC Sport, October 17th, 2025

anticipated—and eye-wateringly expensive—bout between Paul and British boxer Anthony Joshua.⁸²

As a result, the sports ecosystem entering 2026 looks profoundly different from the one that existed just a few years ago. **Fans are developing new habits and routines, and streaming has begun to displace other channels as the crucible in which sporting culture is forged.** With the sole exception of Baby Boomers, sports fans of all ages are now more likely to be watching sports content on streaming platforms than anywhere else.

82. Patrick Finlay, "Staggering Amount of Money Netflix Had to Pay to Make Jake Paul vs Anthony Joshua Happen," GiveMeSport, November 21st, 2025



More to explore

The migration of live sports to streaming platforms has, at times, created headaches for fans left unclear of where to watch their favorite teams. Read TheWrap's coverage to find out how fans are navigating an increasingly confusing broadcast landscape.

Thanks to streaming, formerly niche sports and leagues are moving into the mainstream

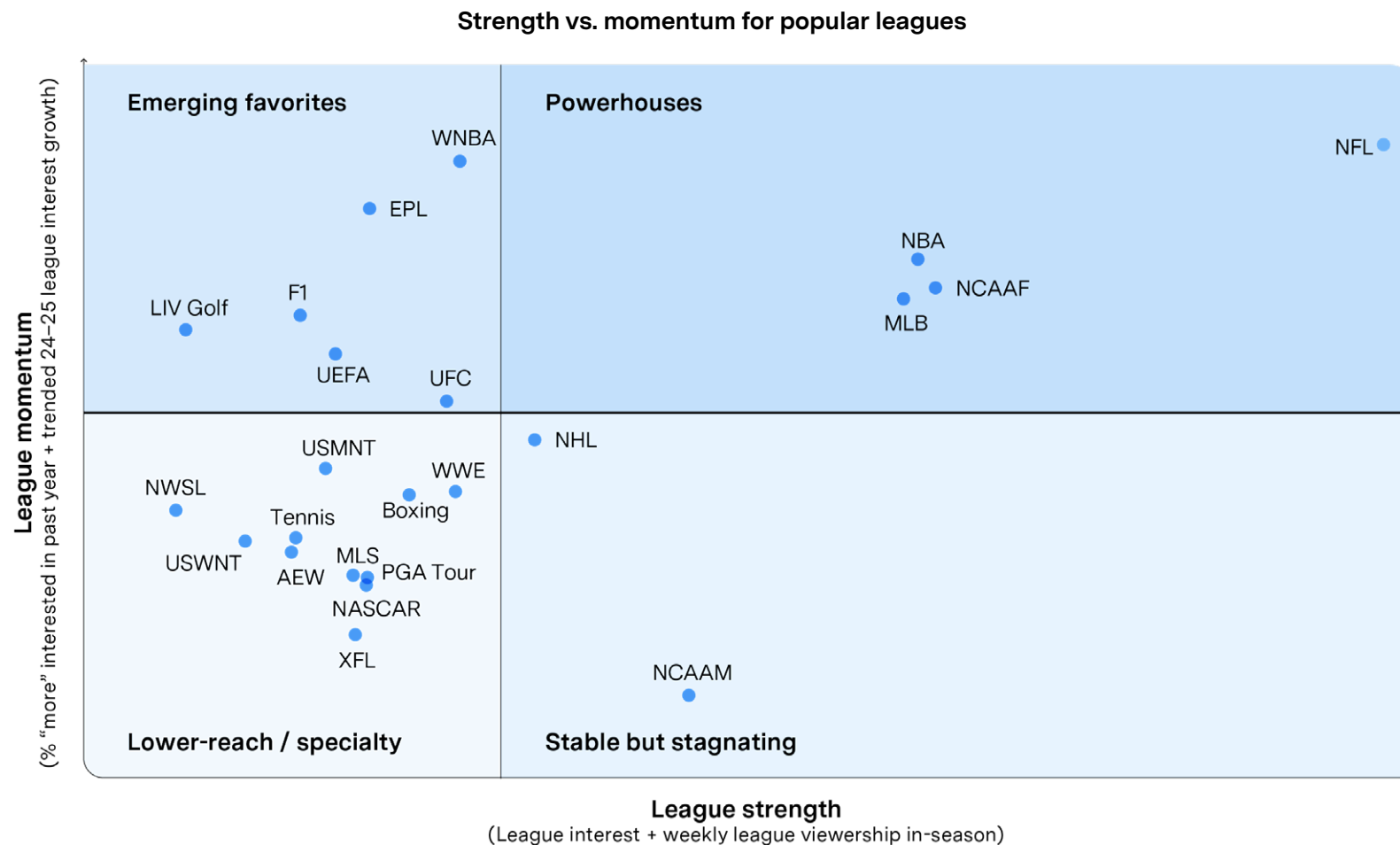
Streaming platforms aren't just giving fans more ways to watch the content they already care about; they're introducing them to new events and leagues, reshaping the terrain of sports fandom itself.

Historically, barriers to access—limited airtime, regional blackouts, and expensive cable packages—made it difficult for smaller sports or international leagues to grow their audience in the US. Streaming has begun to dissolve those barriers.⁸³

Sports like Formula 1, cricket, soccer, and various women's leagues have benefitted enormously.⁸⁴ Games that once required dedicated subscriptions or which were simply unavailable in the US can now be surfaced through personalized recommendation algorithms on platforms like Netflix, YouTube, and Amazon Prime Video. That process of frictionless discovery has invited new fans into sporting cultures that previously felt distant from the American mainstream.

83. "Live sports: The next frontier in the streaming wars?" National Research Group, April 24th, 2022

84. "Why investors are piling into niche sports," The Economist, September 9th, 2025



n=626 US sports fans, ages 18 to 64. Survey conducted in October 2025.

NRG's data shows that, while traditional powerhouses like the NBA and NFL still command the lion's share of public attention, formerly niche leagues like the WNBA, as well as global sports like F1 and international imports like the English Premier League, now have strong momentum behind them, benefiting from exceptional year-on-year growth in fan interest and awareness. In 2024, the WNBA was the fastest-growing brand in professional sports—helped along, of course, by the media frenzy surrounding league superstar Caitlin Clark.⁸⁵

Streaming has also created new opportunities for narrative sports storytelling, with platforms increasingly using fictional shows and movies as well as documentaries and docuseries to help drive engagement for their live sports offerings. Netflix's *Drive to Survive* series played a major role in popularizing F1 within the US.⁸⁶ Apple is likely hoping that the box office success of *F1* augurs well for their own investment in the sport. And Ryan Reynolds and Rob McElhenney pulled off the unthinkable with their streaming series *Welcome to Wrexham*, getting Americans to pay attention to the fifth tier of English soccer.

85. Susan M. Shaw, "The WNBA Was The Fastest-Growing Brand In Professional Sports In 2024," *Forbes*, February 4th, 2025

86. William Mullally, "How Netflix's *Drive to Survive* changed sport, film, and television," *The National*, March 14th, 2025

Of course, it's not all good news for fans. Some worry that streaming platforms' embrace of live sports will simply create a net increase in subscription fees; others may struggle to figure out where to watch the games they want to see.

But we do at least seem to be moving toward a more pluralistic sporting culture: one in which leagues beyond the top tier players can carve out their own audiences. That, in turn, is likely to attract new investment to some of these sports, giving athletes more opportunities to monetize their skills and generate their own personal fandoms.



Streaming has helped to create a new generation of fans for whom fandom is inherently participatory

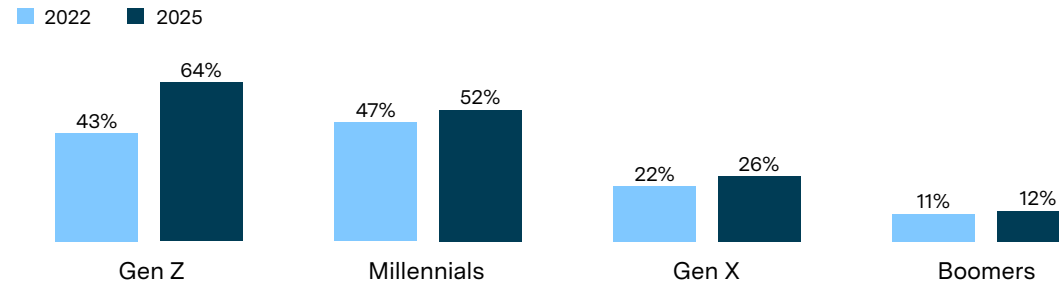
The broadening of the sporting landscape has also helped bring in a new generation of young, streaming-native fans. For years, received wisdom in the industry held that sports was quickly becoming an old person's game: Gen Z and Gen Alpha, we thought, cared more about *Minecraft* and *Fortnite* than *Monday Night Football*.

Now, however, the picture is starting to change; sports that have embraced the transition to the streaming era and the possibilities created by new technologies and communication channels have been able to successfully bring younger audiences into their fandoms.

However, it would be a mistake to assume that these young fans will follow the same trajectory as their predecessors. For one thing, the sports they care about are different: they're less likely to take an interest in traditional mainstays like football or hockey, and more likely to follow basketball, wrestling, and MMA.⁸⁷ But more than that, they

Prevalence of sports betting across generations

Percentage of sports fans who place bets on sports a few times a month or more



Surveys of US sports fans, ages 18 to 64.

have a fundamentally different conception of the relationship between themselves and the teams and the players they're passionate about.

These younger fans have grown up in a post-social media environment; they want to connect with star athletes on a more personal level through podcasts and vlogs, treating them not just as distant idols but as surrogate friends.⁸⁸ And many of them don't care all that much about watching broadcasts as they air; they'd rather engage with sports through highlight reels on TikTok, game breakdowns from other fans, and memes on platforms like Reddit and X.⁸⁹ For them, fandom is about reacting, commenting, and sharing more than it is about sitting back and passively taking in a game.

87. Minal Modha, "Do younger audiences really not watch sport? Here's what the data says," SportsPro, December 9th, 2024

88. Elyse Gorrell, "How social media is changing the game for athletes," The Conversation, June 30th, 2025

Perhaps most significantly, these viewers have largely entered the fandom after the nationwide ban on sports betting was struck down by the Supreme Court in 2018—one of the most significant moments in the history of commercial sports in the US. As a result, they don't have the same stigma around gambling that older generations developed; they're used to a world in which teams and leagues regularly sign sponsorship deals with major gambling brands. And platforms like Kalshi and Polymarket have given them the ability to bet on all sorts of activities beyond the field itself, from who plays the halftime show to whether Taylor Swift shows up to watch the game.⁹⁰

89. Jo Redfern, "Young fans might skip watching the match, but they still love the game," SportBusiness Tech, August 21st, 2025

90. Francesca Maglione, "Taylor Swift Engagement Ignites Bets on Super Bowl and a Baby," Bloomberg, August 26th, 2025



Research by NRG shows that Gen Z are now placing bets more often than any other group of sports fans. And they also appear to be among the most likely to engage in adjacent activities, from speculating on sports-related memecoins to participating in fantasy leagues.⁹¹ All of this reinforces the degree to which fandom has become a dynamic, participatory experience rather than a weekly TV-viewing appointment.

As streaming normalizes this always-on model of engagement, we should expect to see further movement in this direction. Sports fandom will become less tied down to specific moments in time, heavier on narrative, and more closely bound up with digital communities and gambling ecosystems.

91. Ana Faguy, "Why are sex toys being thrown during WNBA games?," BBC News, August 8th, 2025

What's Next:**Three storylines to watch in 2026****The FIFA Men's World Cup comes to North America**

The World Cup will certainly be one of the sporting highlights of 2026. It comes at a pivotal moment for US soccer—at a time when interest in MLS is increasing and international club competitions are more accessible than ever.⁹² But it will also serve as a major stress test for the streaming ecosystem. Fox will be carrying games on Fox One, the streaming service it launched in August 2025; if broadcasts go smoothly and the tournament drives a significant surge in subscriptions, it could accelerate the shift toward a streaming-first model for global sports rights.

92. Austin Karp, "MLS regular season data shows 29% viewership growth over 2024," Sports Business Journal, October 23rd, 2025

**Streamers invest in standalone sporting events**

Between the NBA media rights deals signed in 2024,⁹³ and the various other deals that have closed in 2025, there aren't that many major media packages up for grabs in the near-term future (with the potential exception of the NFL, if the league moves forward with plans to bring its existing deals to an early end in 2026⁹⁴). If streamers want to continue their aggressive push into the sporting arena, they may need to either look further afield for international imports or invest more heavily into launching their own events. Netflix have set the trend with their celebrity-driven boxing matches; 2026 may see more streamers host their own standalone events and tournaments across a diverse range of sports.

93. Brad Adgate, "NBA New Media Rights Agreements Reflect The Growth Of Streaming," Forbes, July 29th, 2024

94. Alex Sherman, "NFL Commissioner Roger Goodell says league could renegotiate media deals as soon as 2026," CNBC, September 24th, 2025

**Sports betting braces for backlash**

Legalized gambling has, in tandem with streaming, played a major role in the growth of sports fandom among younger audiences and the emergence of new sporting communities. But the industry faces some challenging headwinds heading into 2026. Recent gambling scandals in professional and college sports have shone a light on the dangers of unfettered access to sports betting,⁹⁵ while the new crop of "prediction markets" like Kalshi are currently mired in disputes with regulators and gambling commissioners.⁹⁶ And a growing share of Americans now view legal sports betting as a net negative for society and for sports themselves.⁹⁷

95. David Purdum, "Chauncey Billups, Terry Rozier arrested in gambling inquiries," ESPN, October 23rd, 2025

96. Jonathan Stempel, "Kalshi is subject to Nevada gaming rules, judge finds," Reuters, November 26th, 2025

97. John Gramlich, "Americans increasingly see legal sports betting as a bad thing for society and sports," Pew Research Center, October 2nd, 2025

Trend 6

Reconnecting With Reality

Signs of digital fatigue are emerging across the culture, with consumers increasingly seeking out experiences that foster real-world connection rather than passive consumption. Gen Z and Gen Alpha—despite being the most online generations—are leading the push for meaningful, in-person moments.

For the entertainment industry, this shift represents a rare opportunity to reimagine how content shows up in theaters and other out-of-home contexts, and to experiment with new screening formats that meet audiences where appetites are heading.



Americans—especially Gen Z and Gen Alpha—want to make room for more real-world experiences in their lives

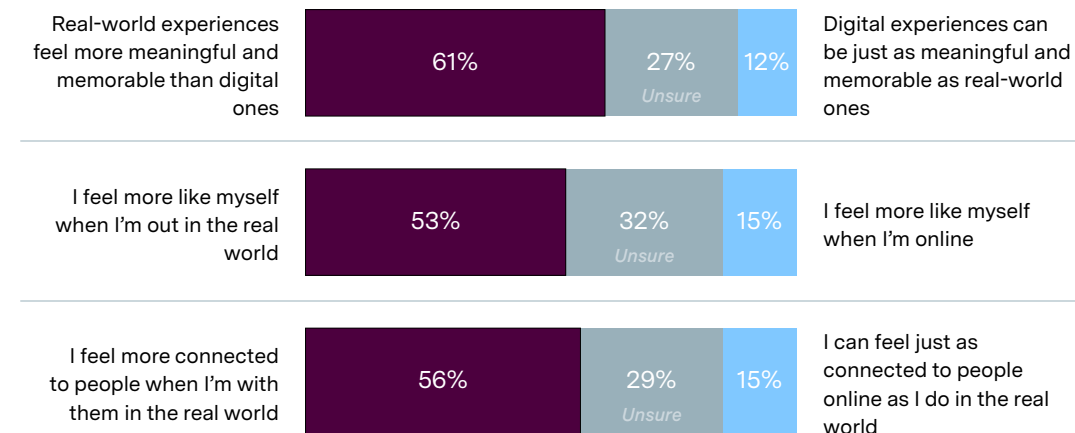
After a decade in which digital platforms became the default setting for work, leisure, and social connection, audiences are showing signs that they might be ready to start pushing back. There's a strong desire—particularly among younger generations—to reclaim more of their time for offline connection and community. Increasingly, it feels as if 2026 might be the year in which the pendulum starts to swing back toward experiences that feel tangible, communal, and unmediated by algorithms.

The majority of consumers believe that real-world experiences are more meaningful, more authentic to their true identities, and more conducive to building relationships with others. Digital spaces still matter, of course; for today's kids and teens, they're now the primary vehicle through which they learn social skills and maintain relationships with their peers.⁹⁸ But there's a clear appetite for a rebalancing in favor of the real world.

98. "Growing Pains: the scrolls and tolls of modern childhood," National Research Group, March 25th, 2025

Public attitudes toward digital and real-world experiences

Percentage of consumers who agree with each statement



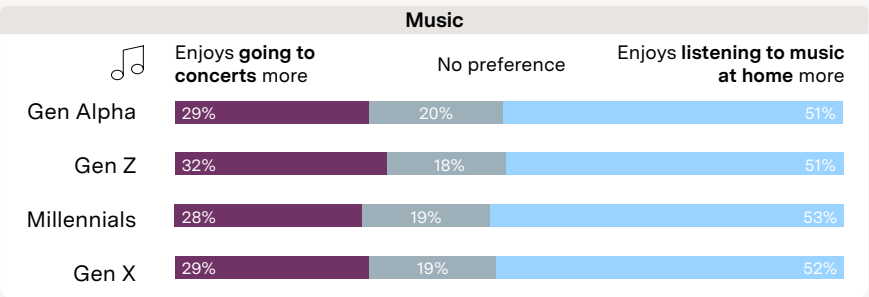
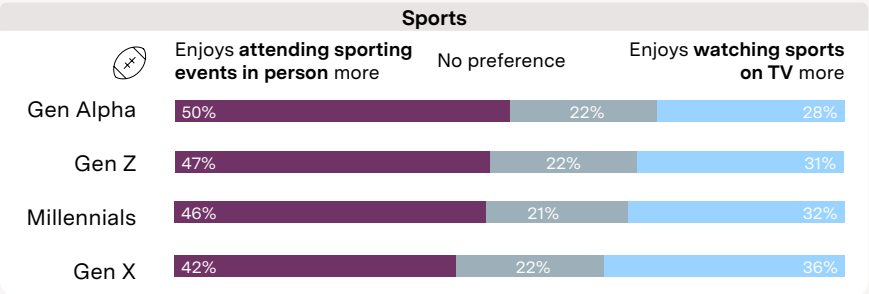
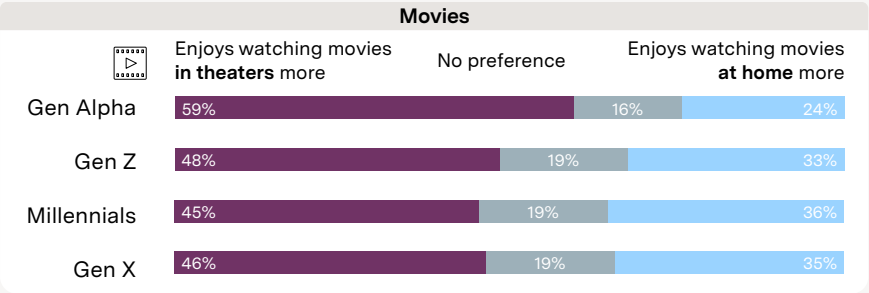
n=3,500 US entertainment consumers, ages 13 to 64. Survey conducted in November 2025.

Across nearly every category measured by NRG—movies, sports, gaming, dining—Americans express greater enthusiasm for in-person experiences than their at-home equivalents. The sole exception is live music: most people would prefer to listen to their favorite artists on streaming than make the trek out to a live gig.

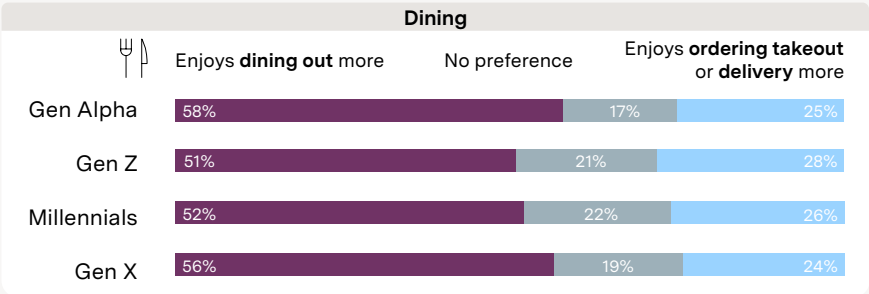
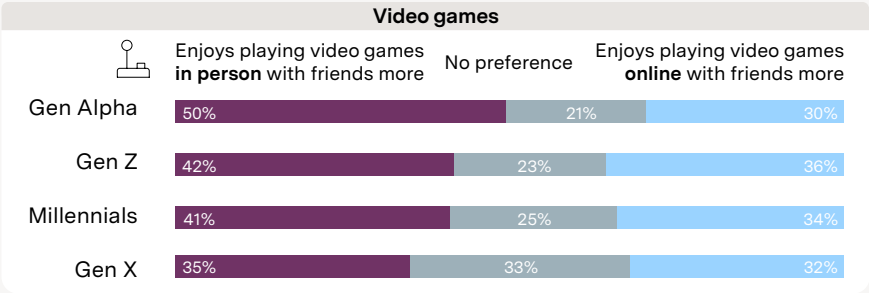
Crucially, it's Gen Z and Gen Alpha—the generations that have grown up in a world of frictionless, "on demand" content experiences—that actually show the strongest preference for live events and creating memories in the real world. Despite being the most digitally fluent generations in history, they're also among the most eager to spend more of their free time offline, whether that's going to the movies or simply playing video games with friends in the same physical space.



Preferences for real-world vs. at-home experiences



n=6,100 US moviegoers, ages 6 to 60. Survey conducted in May and June 2025.



More to explore

In *Gen Alpha Saves the Box Office?*, NRG looks at why younger Americans, specifically, are hungry for real-world connection, and how that appetite could shape the future of the theatrical experience.

NRG’s research has also found that the social aspect of live experiences plays a larger role in motivating Gen Z and Gen Alpha to leave the house.⁹⁹ In the case of moviegoing, for example, older generations are more likely to say they enjoy going because of the quality of the sound or the picture quality in theaters relative to what’s on offer at home. Younger Americans, on the other hand, go because they enjoy the experience of spending time with their friends and family, experiencing communal moments of joy and delight with others in the same physical space. That’s also why kids and teens are the most likely to say that they prefer going to a busy theater over a quiet one: it’s about the energy in the room as much as the story on the screen.

Together, these findings reflect a broader cultural recalibration: as digital abundance becomes the norm, real-world scarcity becomes a selling point. After decades of being told the future would be frictionless and online, people are increasingly seeking out experiences with texture, effort, and presence.

99. “Gen Alpha at the Movies: From Pixels to Popcorn,” National Research Group, August 29th, 2025

Consumers are looking for ways to use technology to facilitate, rather than replace, real world interaction

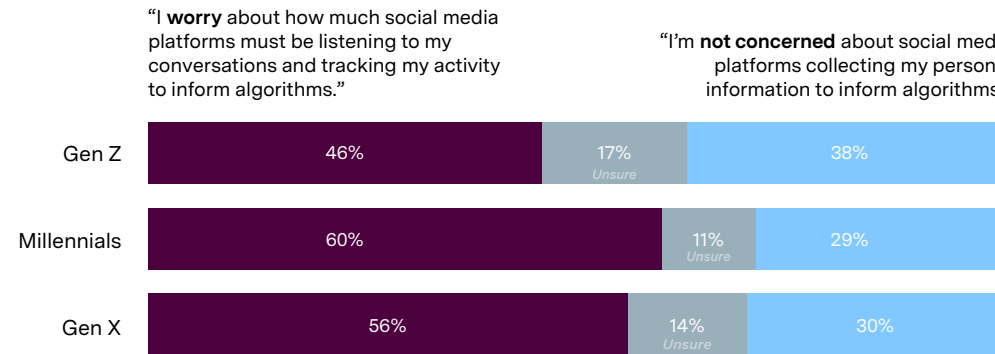
Alongside this cultural vibe shift, there's a growing sense of unease among ordinary consumers about the extent to which they've surrendered control of their lives to unseen, poorly understood algorithms on social media platforms and streaming services.

Americans of all ages say that they're uncomfortable with the way that social platforms intrude on their sense of privacy and autonomy. And the growing popularity of AI tools threatens to erode consumers' digital privacy even further; Sam Altman himself has acknowledged that the increased personalization of AI tools creates a major risk of backlash among security-conscious users.¹⁰⁰

100. Roger Monti, "OpenAI's Sam Altman Says Personalized AI Raises Privacy Concerns," Search Engine Journal, November 12th, 2025

Public attitudes toward online privacy

Percentage of consumers who agree with each statement



n=1,000 US social video users, ages 13 to 54. Survey conducted in November 2025.

The solution, in the eyes of many consumers, is to reimagine the role that technology plays in their lives: to actively seek out opportunities where digital services can help to facilitate, rather than replace, moments of real world connection.

We can see this trend reflected in the growing popularity of "anti-screen" digital products. Focus Friend, for instance—a minimalist productivity app developed by YouTube and TikTok star Hank Green, which pairs users with a cartoon bean who encourages them to put their phone down—topped the App Store charts on release, and was later named by Google Play as its "app of the year."¹⁰¹

101. Sarah Perez, "Hank Green's Focus Friend is Google Play's app of the year," TechCrunch, November 18th, 2025

Major platforms are responding to this sentiment as well. In October 2025, YouTube introduced time-limit tools for its Shorts feed, allowing users to cap their daily scrolling and reassert control over their screen time.¹⁰² For an app built on the promise of infinite scrollability, the addition of these kinds of opt-in guardrails is noteworthy; it signals that platforms now recognize consumer fatigue with bottomless feeds, and the reputational risks of being seen as digital time sinks.

102. Jess Weatherbed, "YouTube will help you quit watching Shorts," The Verge, October 22nd, 2025



And there's a growing market of tech products designed specifically to help parents bring their kids' screen time under control. Curio, a line of chatbot-powered stuffed toys that markets itself as a "screen time alternative," has attracted the attention of parents seeking ways to occupy their children's attention that don't involve staring at a device.¹⁰³ Back-to-basic "dumbphones," meanwhile, have become a popular smartphone alternative for those who want their kids to be able to reach them, but without the ability to access online media at will.¹⁰⁴

103. Eshita Gain, "AI plush toys promise screen-free play for kids—but at what cost?," Mint, August 17th, 2025

104. Catie McLeod, "The child's first phone dilemma: 'Parents need to get really involved in this'," The Guardian, September 21st, 2025

For the entertainment industry, this shift represents an opportunity to remind audiences of the value of the theatrical experience

As audiences push back against digital saturation, there's a unique opportunity for the entertainment industry to channel that energy into real-world touchpoints that feel immersive and communal, and which can't be reproduced at home. Theatrical spaces are increasingly being reimagined as experiential hubs that can offer viewers something fundamentally different from what they'd get in their bedrooms or their living rooms.

Experimentation pushing the boundaries of the theatrical experience

Classic and specialist film formats

- *One Battle After Another* lured in true cinephiles through VistaVision screenings in select cities, becoming the first movie in decades to screen in the format. In some cases, this required restoring projectors that hadn't been used since the 1950s.¹⁰⁵
- In marketing *Sinners*, Warner Bros. made the various screening formats a core part of the narrative. Ryan Coogler filmed a promotional video with Kodak, in which he nerded out over the differences between film formats, generating much discussion among online film communities.¹⁰⁶

105. Ben McCann, "One Battle After Another is the latest film shot in VistaVision, a 1950s format making a big comeback," *The Conversation*, September 24th, 2025

106. Leah Schnelbach, "Sinners Director Ryan Coogler Get Lovingly Nerdy Over Aspect Ratios," *Reactor*, April 24th, 2025



Novelty screenings

- Dystopian thriller *The Long Walk* ran a unique "treadmill screening" for creators and influencers: viewers were required to keep pace with the characters in the movie, or be forcefully ejected from the theater.¹⁰⁷
- Viewers were able to see an early preview screening of Yorgos Lanthimos' *Bugonia* in LA for free, provided they were willing to shave their heads first; a barber was on standby to provide haircuts.¹⁰⁸

107. Raquel Calhoun, "The Long Walk Turns Screening Into Endurance Test With 3MPH Treadmill Rule," *TheWrap*, August 29th, 2025

108. Catherine Shoard, "Go bald or go home: LA cinema offers free Bugonia ticket to those willing to shave their heads," *The Guardian*, October 20th, 2025



Site-specific installations

- Since launching in August 2025, *The Wizard of Oz at the Sphere*—an immersive Vegas experience that uses state-of-the-art visuals to fully immerse audiences in the world of the MGM classic—has sold more than a million tickets, bringing in \$130 million in revenue.¹⁰⁹
- Netflix recently opened the doors of its first "Netflix House," at the King of Prussia Mall in Philadelphia—offering fans of shows like *Stranger Things* the opportunity to step into their favorite fictional universes.¹¹⁰
- Lionsgate recently launched an immersive *John Wick* experience in Vegas.¹¹¹ Paramount, meanwhile, has announced similar plans to open their own Vegas installation themed around the *Top Gun* franchise.¹¹²

109. Dave Brooks, "Sphere's 'Wizard of Oz' Hits New Box Office Milestone," *Billboard*, October 20th, 2025

110. Nicole Minar, "The First Netflix House Opens Its Doors In Philadelphia," *Young Hollywood*, November 30th, 2025

111. Jason Bracelin, "Inside Las Vegas' new John Wick Experience," *Las Vegas Review-Journal*, March 20th, 2025

112. Emlyn Travis, "Immersive Top Gun experience featuring high-stakes rides and Hard Deck-inspired bar to touch down in Las Vegas," *Entertainment Weekly*, May 23rd, 2025



In the past, there has sometimes been a tendency within the industry to assume that theaters needed to accommodate, not push back on, viewers' reliance on their phones and tablets. "Meta, for example, recently ran a high-profile trial of their "Movie Mate" technology, an in-character chatbot that audiences can interact with using their phones while watching a movie in a theater.¹¹³ Recent research by NRG, however, suggests that this may not be the right approach if theaters want to emphasize the unique power and energy of the theatrical experience.¹¹⁴

When moviegoers are asked about the type of screenings they'd be interested in attending in the future, experiences involving phones or tablets perform exceptionally poorly. Instead, they gravitate toward experiences that offer a heightened sense of immersion—such as Premium Large Format (PLF) screenings and VR and 3D viewings—as well as those that incorporate dining or hospitality elements. They're looking, in other words, for experiences that make going to the theater feel like a true *event*.

113. Brooks Barnes, "Chatting in Movie Theaters Is a No-No. But What About Chatbots?" *The New York Times*, May 2nd, 2025

114. "Gen Alpha at the Movies: From Pixels to Popcorn," National Research Group, August 29th, 2025

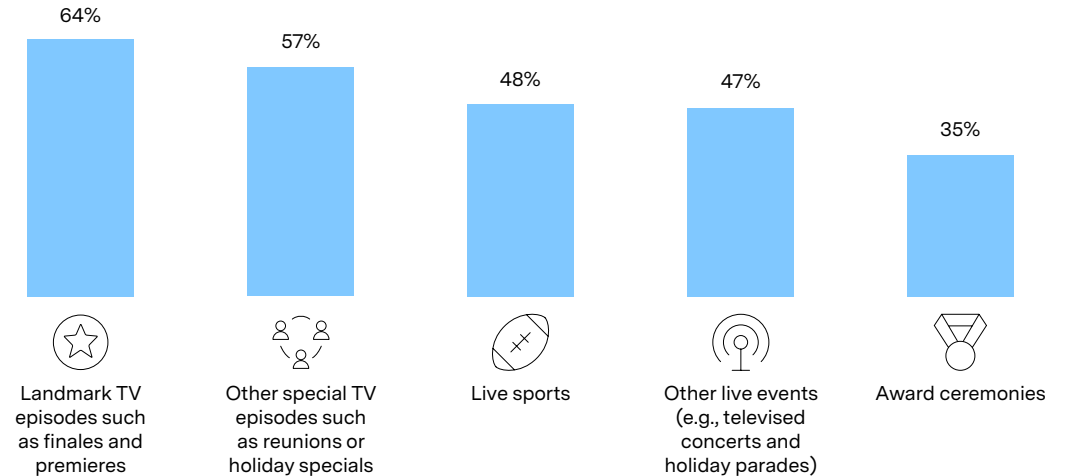
Theaters, it seems, have started responding to this demand. PLF screens such as IMAXes have been growing in popularity in the post-COVID era, steadily increasing their share of the market.¹¹⁵ And studios and exhibitors have started experimenting with new formats and offerings. Specialist and novelty screenings—from *One Battle After Another*'s VistaVision run to *Bugonia*'s viral "bald screening"—all speak to the desire among audiences for moviegoing to feel like an occasion again. While only a tiny percentage of interested consumers may get to attend these kinds of screenings, they can still play an important role in generating interest and tethering the movies, in potential viewers' minds, to a specific and tangible moment in time.

Even streaming platforms have begun investing in physical spaces. 2025 saw the opening of the first wave of Netflix Houses: themed installations that offer fans of the platform's top shows the chance to jump into the universes they love, combining immersive sets with themed eateries and merch outlets.

115. John Hazelton, "Plenty of room in the market: What's next for the thriving premium format cinema sector?" *Screen Daily*, March 26th, 2025

Q: How interested would you be in watching non-movie content in a movie theater?

Percentage "very" plus "fairly" interested



n=3,000 US streaming viewers, ages 13 to 54. Survey conducted in October 2025.



Netflix also made waves recently by announcing plans to put the series finale of *Stranger Things* into more than 350 theaters on New Year's Eve—part of a wider shift in what audiences are willing to think of as “theatrical” content. Nearly two-thirds of streaming viewers say that they’d be open to watching landmark TV episodes in movie theaters; nearly half would be interested in watching live sports broadcasts on the big screen.

So it’s easy to see why, on a recent episode of Matt Belloni’s *The Town* podcast, AMC CEO Adam Aron talked openly about his chain’s desire to start broadcasting big ticket sporting events.¹¹⁶ Or why the UFC has occasionally experimented with putting high profile fights into theaters.¹¹⁷ These kinds of nontraditional screenings could help introduce new audiences to the magic of the movie theater—while also offering exhibitors a way to drive up revenue during otherwise fallow box office windows.

116. Demetri Ravanos, “Are Movie Theaters the Next Gold Rush for Sports?” Barrett Media, September 9th, 2025

117. Liam Killingstad, “UFC On The Big Screen,” Front Office Sports, July 11th, 2021

Taken as a whole, these developments reflect a growing willingness within the industry to reimagine both the scope of theatrical content, and how that content gets presented to viewers. As audiences increasingly express fatigue with algorithmically driven digital life, the industry finds itself with a rare opportunity to reignite viewers’ passion for the theatrical experience—by making theaters the kinds of places people seek out not just to watch the latest releases, but to create unique memories and have experiences they can’t get anywhere else.



What's Next:

Three storylines to watch in 2026



Stranger Things opens the door for the movie-fication of TV

If Netflix's bold experiment to bring Hawkins, Indiana to the big screen, other streamers may follow suit—turning season premieres, finales, and other “event episodes” into theatrical moments. This concept isn't an entirely novel one; Fathom Entertainment has been putting Broadway shows, opera performances, music gigs, and even select TV broadcasts into theaters for many years now.¹¹⁸ But we'll soon find out if it's a model that can be scaled up effectively, and whether general audiences are open to rethinking what type of content feels special and grand enough to merit a trip to the movie theater.

118. Ben Revier, “As movies struggle, U.S. theaters pivot to the events business,” Marketplace, November 24th, 2025



Immersive event venues spread across the nation

As consumers seek out experiences they can't replicate at home, entertainment companies are leaning into large-scale, multisensory environments. Netflix Houses in Philadelphia and Dallas offer fans IRL extensions of their favorite worlds. The hit virtual concert ABBA Voyage will soon be making its US debut in New York.¹¹⁹ And tech company Cosm is set to open specialized sports-centric venues in Atlanta and Detroit which will function as, essentially, miniature versions of the Las Vegas sphere.¹²⁰ Audience response to these launches will tell us whether this kind of experience can be successfully transplanted out of the Nevada desert and into cities across the US.

119. Liam Stack, “ABBA's Popular Hologram Show Could Come to New York City,” The New York Times, November 27th, 2025

120. Alex Sherman, “Cosm considers international expansion of immersive sports-viewing venues,” CNBC, February 5th, 2025



Live events face mounting accessibility and affordability pressure

As demand for real-world entertainment has increased, so have frustrations around the cost of participating. In 2025, we saw increased scrutiny from consumers, press, and regulators on ticketing practices—hidden fees, dynamic pricing, scalper bots—that make concerts and sporting events prohibitively expensive for many.¹²¹ Ticketmaster recently cracked down on scalpers in response to a lawsuit filed by the FTC; regulators may soon be pushing for more far-reaching reforms.¹²²

121. J.R. Lind, “Finding A 'Crisis,' NITO Calls For NY To Cap Ticket Fees,” Pollstar, October 22nd, 2025

122. Cerys Davies, “Ticketmaster to ban multiple accounts, controversial resale software following FTC lawsuit,” Los Angeles Times, October 20th, 2025

In a moment of transition and uncertainty, audiences remain the driving force for the industry

Midway through the 2020s, it's clear that the entertainment industry is in a moment of transition, caught between a chaotic recent history and an uncertain future.

On the one hand, the industry is still grappling with the ramifications of the moments of disruption that defined the first half of the decade: the COVID-19 pandemic of 2020 and 2021, and the twin strikes of 2023. At the same time, it's being pulled forward by powerful forces that are still in the process of taking shape—from the continued growth of streaming, to the growing cultural power of online creators, to the accelerating integration of artificial intelligence into every stage of the creative process.

The as-yet unresolved battle for ownership over Warner Bros. Discovery is perhaps the most obvious flashpoint;

the outcome, whatever it may be, will undoubtedly have profound consequences for the industry. But the uncertainty surrounding the company's future is a microcosm of larger uncertainties clouding the future of media and entertainment: questions around the relationship between theatrical and streaming content, about who controls distribution and discovery in an increasingly fragmented platform landscape, and about how creative labor is valued in an era of AI-enabled automation.

Further complicating matters is the fact that this is all playing out against the backdrop of a changing political climate. The current administration has proved more willing than any other in recent history to exert public pressure on media institutions, drawing entertainment companies into broader cultural and ideological



conflicts—from the President's high-profile lawsuits against individual news outlets, to his proposed (and repeatedly delayed) tariffs on movies made outside the United States.

The entertainment industry has always been shaped by moments of upheaval. What makes this period different is the number of transformations happening simultaneously. Given these intersecting sources of complexity and uncertainty, it's never been more vital for the industry to focus on the human needs underpinning media

consumption and engagement. Technologies, platforms, and business models will continue to evolve, but the fundamental motivations that drive audiences—the need to feel entertained, understood, connected, and seen—remain remarkably consistent.

Brands that understand those timeless needs, and put audiences squarely at the center of their strategic visions, will find themselves best positioned to adapt through uncertainty and come out stronger on the other side.

Methodology

To create this report, we've drawn on NRG's extensive portfolio of market-leading research and insights reports, including syndicated reports from the firm's *Future Of* series, as well as tracking data from its Originals IQ and Franchise IQ programs.

Future of...: A series of annual and biannual reports exploring macro trends in the US and global entertainment landscape. *Future of Film* explores moviegoing habits and theatrical trends; *Future of Series* looks at what audiences want to watch in their living rooms; and *Future of Social Video* unpacks the trends shaping content experiences on the smallest screens of all.

Originals IQ: An "always-on" tracking program that measures audience interest in streaming originals, based on weekly surveys of streaming viewers aged 13 to 54 in the US and four other markets.

Franchise IQ: NRG's tracker measuring consumer attitudes toward franchises across gaming, TV, film, streaming, and more, fueled by surveys of consumers in 12 global markets.

Details of sample size and survey dates have been provided next to all graphs in this report. To learn more about NRG's various research programs, visit nrgmr.com.

About NRG

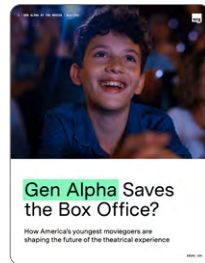
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About WrapPro

WrapPRO is the premium subscription service from the entertainment industry news site, TheWrap, targeting executives and industry professionals. It provides a higher level of analysis and content than the standard, free version of the website, featuring exclusive reporting alongside in-depth coverage, industry data, and in-depth coverage of film, TV, streaming, and the business side of entertainment.

Previous reports



Gen Alpha saves the Box Office

How America's youngest moviegoers are shaping the future of the theatrical experience



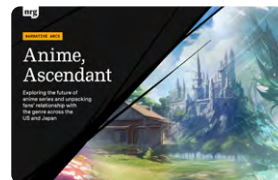
Growing Pains

How the social and technological trends of the twenty-first century have redefined the experience of being a kid and navigating the world as a young person



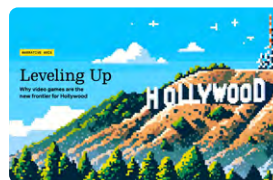
Hero Complex

The role of the entertainment industry in tackling the "crisis of masculinity" afflicting today's boys and young men



Anime, Ascendant

Why interest in anime is surging, and the four forces that will shape the future of the genre



Leveling Up

Why video game adaptations could be the next frontier for Hollywood



Lights, Camera, Amen

What younger Christians are looking for in faith-based content

Words and analysis

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