

Film Analytics



6/29/25

M3GAN MISSES WHILE F1 RUNS HOT

Can it be that the cine-verse is over saturated with mediocre horror? One might be inclined to draw that conclusion given that **M3GAN 2.0** opened drastically lower than any prognosticator had expected. Even the most pessimistic forecasts had the lower bound at about \$15M and ours was higher. Yet the weekend haul looks like about \$10.2M.

Given that 28 Years Later, Sinners, and Final Destination: Bloodlines are still on screens and representative of the horror genre, perhaps it isn't surprising that the not so well regarded M3GAN 2 bit it.

While it would seem to me that anyone who went to see F1 would realize that they were in fact attending a "movie", the title is officially **F1: The Movie**. Be that as it may. F1 overperformed a bit grossing \$55.6M for the weekend, topping our high-end forecast by about 3%.

Holdovers were decidedly mediocre, falling a depressing 51% from last weekend heavily influenced by last weekend's box office sweepstakes winner 28 Years Later falling a whopping 67%. All this leads to another weekend decline over the equivalent weekend of 2024 of about 18% more than was forecast. While the weekend will show a deficit vs. 2024, bear in mind that the total gross for week 26 of 2025 will probably exceed the total for the same week of '24 due to the debut of **Jurassic World: Rebirth** on 7/2, and the higher than normal box office for the "holiday" profile for 7/3.

Next weekend may provide a reversal when Jurassic World: Rebirth grabs the plurality of North American screens. The big opening film for 2024 was Despicable Me 4 at \$75M. Expectations are for a better result on Jurassic.

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Rnk	Title	Distributor	3 Day BOR*	Δ%	Cume*	Cume Est*	Wk#
1	F1: The Movie	Warners	55.60	-	55.6	104	1
2	How to Train Your Dragon	Universal	19.40	-47%	200.1	223	3
3	Elio	Disney	10.70	-49%	42.2	54	2
4	M3GAN 2.0	Universal	10.20	-	10.2	19	1
5	28 Years Later	Sony	9.70	-68%	50.4	59	2
6	Lilo & Stitch	Disney	6.90	-29%	400.1	410	6
7	Mission: Impossible—The Final Reckoning	Paramount	4.15	-36%	186.0	192	6
8	Materialists	A24	3.00	-53%	30.4	33	3
9	From the World of John Wick: Ballerina	Lionsgate	2.13	-53%	55.5	57	4
10	Karate Kid: Legends	Sony	1.00	-58%	51.6	52	5

For this weekend's (studio estimated) opening chart follow the following link. <https://www.the-numbers.com/weekend-box-office-chart> The numbers above are studio estimates on Sunday. Viewing the link above on Monday may result in different values as studios will update their weekend numbers.

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The chart below shows how the industry performed for the current weekend of '25 versus the equivalent weekend of '24 along with projections for next weekend.

Estimates For Week 26 & Week 27	
Week 25 Heldover \$	124.93
Week 26 Holdover \$	60.31
Holdover %	-51.7%
'25 Weekend 26 Total	126.94
'24 Weekend 26 Total	154.79
Year/Year +/- %	-18.0%
'24 Weekend 27 Total	151.55
2025 Week 27 Projections Vs 2024	
New Open Est \$	95.00- 105.00M
Week 27 with Holds @ -52% to -48%	60.9 - 66.0
Weekend 27 Range	155.9 to 171.0
+/- Versus 2024	3% to 13%

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History of Estimates Ranges for 06/27/25 - 07/04/25 Openings

Title	Range	Est Date
F1: The Movie	30M-40M	5/24/2025
F1: The Movie	45M-55M	6/3/2025
F1: The Movie	45M-55M	6/3/2025
F1: The Movie	35M-45M	6/9/2025
F1: The Movie	35M-40M	6/17/2025
F1: The Movie	38M-48M	6/24/2025
F1: The Movie	43M-53M	6/25/2025
F1: The Movie	43M-53M	6/25/2025
M3GAN 2.0	25M-35M	11/14/2023
M3GAN 2.0	25M-35M	3/22/2025
Jurassic World Rebirth	70M-90M	8/20/2024
Jurassic World Rebirth	80M-100M	3/22/2025
Jurassic World Rebirth	80M-100M	6/5/2025
Jurassic World Rebirth	80M-100M	6/5/2025
Jurassic World Rebirth	110M-130M	6/13/2025
Jurassic World Rebirth	95M-115M	6/17/2025
Jurassic World Rebirth	90M-105M	6/17/2025
Jurassic World Rebirth	90M-105M	6/17/2025
Jurassic World Rebirth	95M-105M	6/27/2025

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Upcoming Significant Wide Release Films 7/4/25

Jurassic World: Rebirth (Universal, PG13, 134, Action) Five years after Dominion, an expedition tries to extract DNA from three prehistoric creatures. What could go wrong? Well, a lot. Scarlet Johansen takes over the lead in an effort to extend the franchise's success.

Estimates are in the chart below.

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Forecast (Millions Except Where Noted)							
Opening	Film Week*	Film Title	Distributor	Opening Est		Cume Est	
				Low	High	Low	High
7/2/25	7/4/25	Jurassic World Rebirth	Universal	95	105	328	363
	7/11/25	Superman	Warner Bros.	115	135	336	394
	7/18/25	Eddington	A24	3	9	9	26
	7/18/25	Smurfs	Paramount Pictures	15	20	49	66
	7/18/25	I Know What You Did Last Summer	Sony Pictures	20	25	58	73
	7/25/25	House on Eden	IFC Entertainment Group	500K	2	1	4
	7/25/25	The Fantastic Four: First Steps	Walt Disney	90	110	274	334
	8/1/25	Naked Gun	Paramount Pictures	15	20	53	71
	8/1/25	The Bad Guys 2	Universal	25	30	79	95
8/6/25	8/8/25	Sketch	Angel Studios	2	6	5	16
	8/8/25	Freakier Friday	Walt Disney	28	33	85	101
	8/8/25	Weapons	Warner Bros.	10	15	27	41
8/14/25	8/15/25	Shin Godzilla	GKIDS	500K	2	897K	3
	8/15/25	Eli Roth Presents: Jimmy and Stiggs	Iconic Releasing	2	4	5	11
	8/15/25	Americana	Lionsgate	3	5	8	13
	8/15/25	Clika	Sony Pictures	3	8	8	21
	8/15/25	Nobody 2	Universal	8	12	22	34
	8/22/25	Honey Don't	Focus Features	2	4	5	11
	8/22/25	Grand Prix of Europe	Viva Pictures	500K	1	1	3
	8/29/25	The Toxic Avenger Unrated	Cineverse	3	4	7	10
	8/29/25	Caught Stealing	Sony Pictures	10	14	25	35
	8/29/25	The Roses	Walt Disney	10	14	27	38
	9/5/25	Light of the World	Salvation Poem Project	2	6	5	15
	9/5/25	The Conjuring: Last Rites	Warner Bros.	20	25	54	67
	9/12/25	Spinal Tap II: The End Continues	Bleecker Street	2	3	4	8
	9/12/25	Downton Abbey: The Grand Finale	Focus Features	13	17	34	46
	9/12/25	The Long Walk	Lionsgate	12	16	31	41
	9/12/25	Demon Slayer -Kimetsu no Yaiba- The Movie: Infinity Castle	Sony Pictures	7	11	11	17
	9/19/25	A Big Bold Beautiful Journey	Sony Pictures	12	16	36	49
	9/19/25	Him	Universal	7	11	19	30
	9/26/25	The Strangers: Chapter 2	Lionsgate	10	14	24	34
	9/26/25	Gabby's Dollhouse: The Movie	Universal	5	7	13	19
	9/26/25	One Battle After Another	Warner Bros.	15	20	38	51
	10/3/25	The Smashing Machine	A24	4	6	10	15
	10/3/25	Untitled Zurty Studios Film45933	Zurty Studios	250K	750K	610K	2

*First Friday after Opening Date. Opening Date shows if it is not a Friday

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Month	Monthly Comps Box Office									
	2023	% Diff	2024	% Diff	2025 Low	% Diff	2025 Avg	% Diff	2025 High	% Diff
1	564.6	45%	497.0	-12%	538.0	8%	538.0	8%	538.0	8%
2	497.5	36%	357.9	-28%	469.7	31%	469.7	31%	469.7	31%
3	637.8	8%	741.2	16%	391.3	-47%	391.3	-47%	391.3	-47%
4	899.1	56%	420.2	-53%	862.3	105%	862.3	105%	862.3	105%
5	774.0	-1%	543.0	-30%	953.5	76%	953.5	76%	953.5	76%
6	1,003.7	4%	964.3	-4%	985.6	2%	994.6	3%	1,003.5	4%
7	1,362.6	20%	1,167.1	-14%	1,332.3	14%	1,446.8	24%	1,561.2	34%
8	812.5	74%	886.8	9%	625.9	-29%	731.4	-18%	839.6	-5%
9	472.5	47%	589.9	25%	345.0	-42%	416.3	-29%	488.1	-17%
10	555.8	19%	458.4	-18%	498.2	9%	605.2	32%	711.1	55%
11	551.4	-12%	896.6	63%	762.5	-15%	890.1	-1%	1,019.5	14%
12	699.0	5%	971.4	39%	1,381.8	42%	1,555.1	60%	1,728.6	78%
Totals	8,830.3	20%	8,493.9	-4%	9,146.1	8%	9,854.2	16%	10,566.3	24%

Month	Cumulative Monthly Comps Box Office								
	2023	2024	% Diff	2025 Low	% Diff	2025 Avg	% Diff	2025 High	% Diff
1	564.6	497.0	-12%	538.0	8%	538.0	8%	538.0	8%
2	1,062.1	854.9	-20%	1,007.7	18%	1,007.7	18%	1,007.7	18%
3	1,699.9	1,596.1	-6%	1,399.0	-12%	1,399.0	-12%	1,399.0	-12%
4	2,598.9	2,016.4	-22%	2,261.3	12%	2,261.3	12%	2,261.3	12%
5	3,372.9	2,559.4	-24%	3,214.8	26%	3,214.8	26%	3,214.8	26%
6	4,376.6	3,523.7	-19%	4,200.4	19%	4,209.4	19%	4,218.3	20%
7	5,739.1	4,690.8	-18%	5,532.8	18%	5,656.1	21%	5,779.5	23%
8	6,551.6	5,577.6	-15%	6,158.6	10%	6,387.6	15%	6,619.1	19%
9	7,024.1	6,167.5	-12%	6,503.6	5%	6,803.9	10%	7,107.2	15%
10	7,579.9	6,625.9	-13%	7,001.8	6%	7,409.1	12%	7,818.3	18%
11	8,131.3	7,522.5	-7%	7,764.3	3%	8,299.2	10%	8,837.7	17%
12	8,830.3	8,493.9	-4%	9,146.1	8%	9,854.2	16%	10,566.3	24%

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Month	Monthly Comps Est Attendance									
	2023	% Diff	2024	% Diff	2025 Low	% Diff	2025 Avg	% Diff	2025 High	% Diff
1	51.8	40%	45.1	-13%	48.0	7%	48.0	7%	48.0	7%
2	45.6	31%	32.5	-29%	41.9	29%	41.9	29%	41.9	29%
3	58.5	5%	67.3	15%	34.9	-48%	34.9	-48%	34.9	-48%
4	82.5	51%	38.1	-54%	77.0	102%	77.0	102%	77.0	102%
5	71.0	-4%	49.3	-31%	85.1	73%	85.1	73%	85.1	73%
6	92.1	0%	87.5	-5%	88.0	1%	88.8	1%	89.6	2%
7	125.0	16%	105.9	-15%	119.0	12%	129.2	22%	139.4	32%
8	74.5	68%	80.5	8%	55.9	-31%	65.3	-19%	75.0	-7%
9	43.3	42%	53.5	24%	30.8	-42%	37.2	-31%	43.6	-19%
10	51.0	15%	41.6	-18%	44.5	7%	54.0	30%	63.5	53%
11	50.6	-15%	81.4	61%	68.1	-16%	79.5	-2%	91.0	12%
12	64.1	2%	88.1	37%	123.4	40%	138.8	58%	154.3	75%
Totals	810.1	16%	770.8	-5%	816.6	6%	879.8	14%	943.4	22%

*Projections for 2025 include Untitled films that may be placeholders for pending films.

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1	51.8	40%	45.1	-13%	48.0	7%	48.0	7%	48.0	7%
2	45.6	31%	32.5	-29%	41.9	29%	41.9	29%	41.9	29%
3	58.5	5%	67.3	15%	34.9	-48%	34.9	-48%	34.9	-48%
4	82.5	51%	38.1	-54%	77.0	102%	77.0	102%	77.0	102%
5	71.0	-4%	49.3	-31%	85.1	73%	85.1	73%	85.1	73%
6	92.1	0%	87.5	-5%	88.0	1%	88.8	1%	89.6	2%
7	125.0	16%	105.9	-15%	119.0	12%	129.2	22%	139.4	32%
8	74.5	68%	80.5	8%	55.9	-31%	65.3	-19%	75.0	-7%
9	43.3	42%	53.5	24%	30.8	-42%	37.2	-31%	43.6	-19%
10	51.0	15%	41.6	-18%	44.5	7%	54.0	30%	63.5	53%
11	50.6	-15%	81.4	61%	68.1	-16%	79.5	-2%	91.0	12%
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Included are baseline estimates for films designated as Untitled. When more details are available more fulsome estimates will be provided.

It is possible that some films will be added to or deleted from the schedule in Q3 – Q4. Right now, Q2 is set with Q3 schedule near complete and Q4 still subject to additions and deletions of dated film.

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Looking at how gross concentration has changed over the last decade, we can see that the industry is reliant more and more on the biggest of films. The reason, big budget event releases are dominating box office while streaming is becoming the more likely outlet for lesser (and often riskier) movies.

Gross Concentration Films Opening in Each Year												
Tier	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Gross (BB)	10.56	11.06	11.70	10.77	11.83	10.74	1.65	4.81	7.41	9.14	8.50	3.51
Top 50 \$	7.49	8.49	8.64	8.15	8.82	8.37	1.58	4.40	6.83	7.37	7.38	3.32
Top 50%	71%	77%	74%	76%	75%	78%	96%	91%	92%	81%	87%	95%
Top 25 \$	5.21	6.43	6.60	6.05	6.60	6.48	1.41	3.57	5.75	5.53	6.04	2.83
Top 25%	49%	58%	56%	56%	56%	60%	85%	74%	78%	61%	71%	81%
Top 10\$	2.74	4.00	4.02	3.52	3.98	4.32	1.08	2.38	4.10	3.38	3.92	2.17
Top 10%	26%	36%	34%	33%	34%	40%	65%	49%	55%	37%	46%	62%

* Film than had their opening date in the year indicated

Tiered Grosses Films Opening in Each Year



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