

LUMINATE

MAY 2026 MUSIC BIZ

State of the Industry

Current Global Consumption & Trends

Introduction



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**LUMINATE
LOS ANGELES**

AGENDA

01 Q1 2026 Global Metrics

02 Global Export Power

03 Latin Music Boom

04 Music Listeners in Mexico and Brazil

*30+ years in business,
3+ years of next-gen platform
development and innovation*

Rooted in Music and Film/TV

*Essential to a
customer's understanding
of their business*

*As a data company, if
your data is not accurate,
you are irrelevant*

To **build** the **entertainment economy's** most **essential, accurate**
and **objective** data and make it **accessible to everyone**

*No bias - built upon
organizational independence
and integrity*

*While we come from
enterprise, making the right
information available to talent,
creators and artists is a goal*

Essential Entertainment Industry Activity & Audience Intelligence at Scale

4 TB+

Data Processed
Daily

19B+

Daily Streams

13B+

Streaming
Minutes Watched

15M+

Musical Artists

20K+

Film & Television
Titles

100M

Publishing Works

500+

Data Providers

60+

Countries

The Entertainment Ecosystem Trusts Luminate



Our Solutions

Consumption

Metadata

Music

Consumption Activity

More than 500 verified streaming, retail and airplay sources tracking millions of artists, albums and songs in 60+ global markets

Data Enrichment

The world's largest artist identification and songwriter works database with over 300 million identifiers

Film & TV

Streaming Viewership (M)

Minutes watched for all original films and episodic series across all major U.S. streamers

Film & TV Metadata

Verified and timely information on people, projects and companies across film and TV in seven markets

Insights & Intelligence

Custom and Syndicated Research, Analysis & Consultation

Surveys, reports, analysis and recommendations, based on client needs

Data Partnership Update

New Partner Updates for CONNECT

Spotify Video

Spotify video data broken out on-platform.

Tencent

Executed special partnership with Tencent - with initial data available now in Worldwide view.

Deezer

Q2 launch targeted

Luminate Roadmap Themes

MUSIC

- Advanced AI-driven Capabilities (UI, Lumi Chat, MCP)
- CONNECT for Publishing - Works/ISWC visibility
- Advanced A&R Capabilities
- AI Music Data
- Social Data
- Short Form Data
- Live Event Data

AUDIENCE INSIGHTS

- Quarterly Audience Syndicated Research
- Brand and Audience Profiling and Spending Trends
- “Comes with Data” Custom Consulting Services: Data Access and Analytical Services

FILM & TV + STREAMING VIEWERSHIP (M)

- Expanded Video Streaming Data Providers
- Cue Sheets / Music in Film & TV
- Talent Dashboard in SVM

All themes subject to change



A person in a dark jacket is performing on stage, holding a microphone and a drumstick. The scene is dimly lit with a blue tint.

/01

Q1 2026 Global Metrics

1/2/26 - 4/2/26
vs. 1/3/25 - 4/3/25

Global Metrics

Q1 2026 Q1 2025

GLOBAL ON-DEMAND AUDIO SONG STREAMS



9.7%
Q1 '26 vs. Q1 '25

EX-U.S. ON-DEMAND AUDIO SONG STREAMS



11.6%
Q1 '26 vs. Q1 '25

U.S. ON-DEMAND AUDIO SONG STREAMS



4.8%
Q1 '26 vs. Q1 '25

CANADA ON-DEMAND AUDIO SONG STREAMS

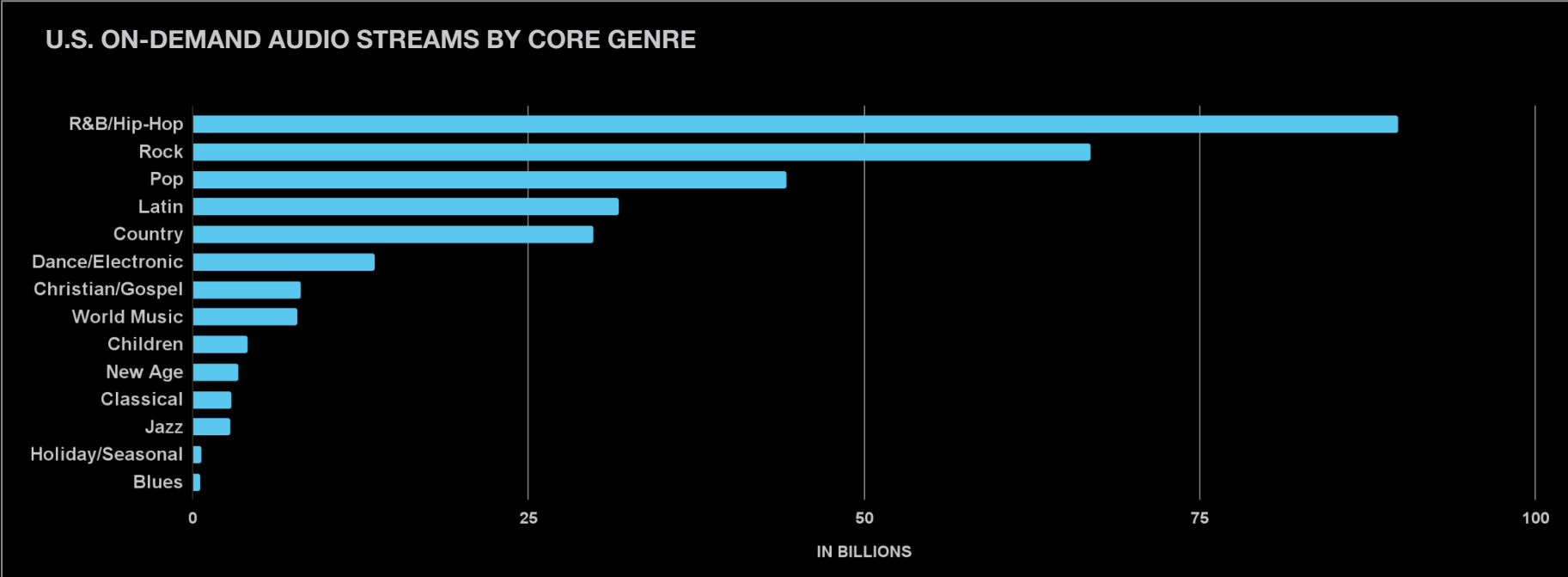


3.4%
Q1 '26 vs. Q1 '25



U.S. Main Genre Trends in Q1 2026

- The Latin music and Country genres continue their back-and-forth rankings as Bad Bunny's new album and Super Bowl performance in February help drive the genre to 4th largest, just ahead of Country
- The Christian / Gospel genre ranked as 7th largest in streaming volume



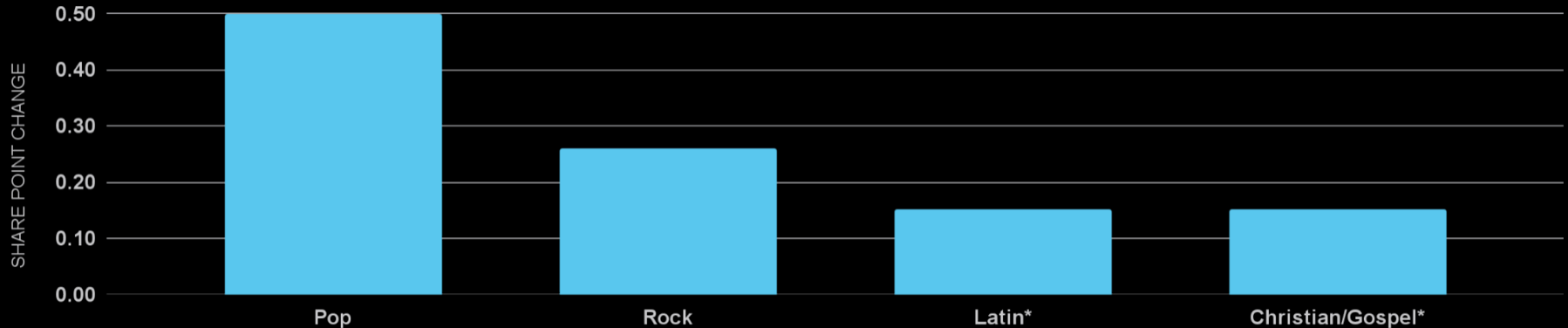
U.S. Genre Trends Q1 2026

- BTS' new album *ARIRANG* is categorized as the Pop, helping to drive the genre to the top growth spot through Q1 2026
- Rock continues its recent strong growth to place second during Q1 after being the top growth genre of 2025
- Latin and Christian / Gospel both grow +.15 share points to rank third in overall growth. A focus on the Latin genre follows in the upcoming slides.

Q1 2026 TOP GROWTH GENRES

Billboard Genres; On-Demand Audio; Ranked by Sharepoint Change in Q1 2026 vs. Q1 2025

*Latin and Christian/Gospel genres both grow +.15 share points



/02

Global Export Power

BTS and Bad Bunny Drive Korean and Puerto Rican Export

Global Export Power Rankings (Q1 2026)

Luminate Export Power Rankings evaluate a country or territory's ability to export recorded music globally.

This score is a combination of four data points: the rank of artists in each country based on Total On-Demand Streaming and Country of Origin; the number of countries importing music from a given export country; the streaming size of importing countries; and the number of artists per export country reaching international audiences.

RANK	COUNTRY / TERRITORY	FIRST	SECOND	THIRD	TOP EXPORT GENRE	TOP ARTISTS OF EXPORT GENRE
1	United States	Canada	Australia	New Zealand	R&B/Hip-Hop	Kanye West
2	United Kingdom	United States	Australia ↑	Ireland ↓	Rock	Coldplay
3	South Korea ↑	United States ↑	Taiwan ↓	Japan ↑	K-Pop	BTS
4	Canada ↓	United States	United Kingdom	Australia	R&B/Hip-Hop	The Weeknd
5	Puerto Rico ↑	United States	Mexico	Spain	Latin	Bad Bunny
6	Germany ↓	Austria	Switzerland	Turkey ↑	Dance/Electronic	Boney M.
7	France ↓	Belgium	Switzerland	Lebanon ↑	Dance/Electronic	David Guetta
8	Australia	United States	United Kingdom ↑	Canada	Pop	Sia
9	Brazil	Portugal	Bolivia	Argentina	Latin	MC GW
10	Sweden	United States	United Kingdom ↑	Germany	Dance/Electronic	ABBA

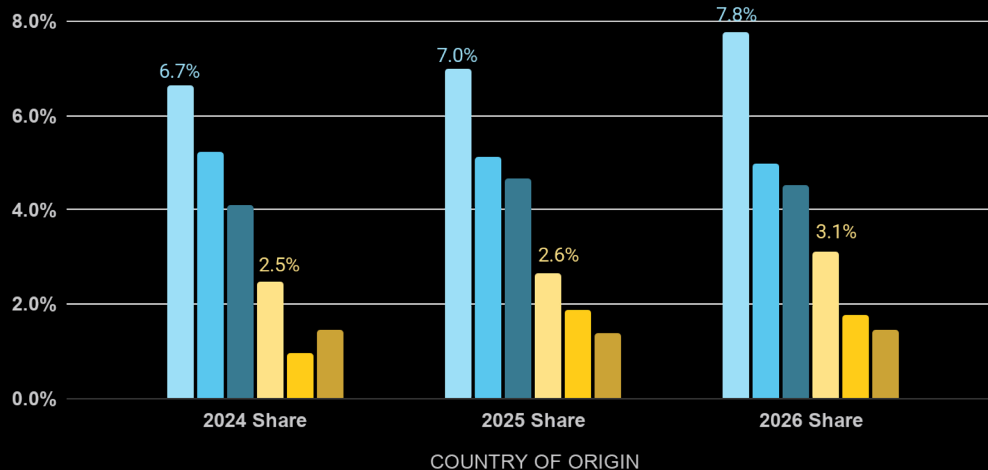
U.S. Streaming by Country / Territory of Origin

Just over 2 in every 3 U.S. streams is an American artist, however, this figure is declining each year as streaming consumption continues to diversify. Notably, artists from the UK have increased their share of U.S. streaming +8 share points in 2026 while Bad Bunny has driven Puerto Rico streaming to a +.5 sharepoint gain. Other countries to gain ground in the U.S. market include Australia and Sweden.

SHARE OF COUNTRY OF ORIGIN (EXCLUDING U.S.)

U.S. On-Demand Audio

United Kingdom Mexico Canada Puerto Rico South Korea Australia



Top UK Artist in the U.S.

Olivia Dean (Overall Rank: 16)

Top Puerto Rican Artist in the U.S.

Bad Bunny (Overall Rank: 2)

Top Australian Artist in the U.S.

Tame Impala (Overall Rank: 80)

Top Swedish Artist in the U.S.

Zara Larsson (Overall Rank: 214)



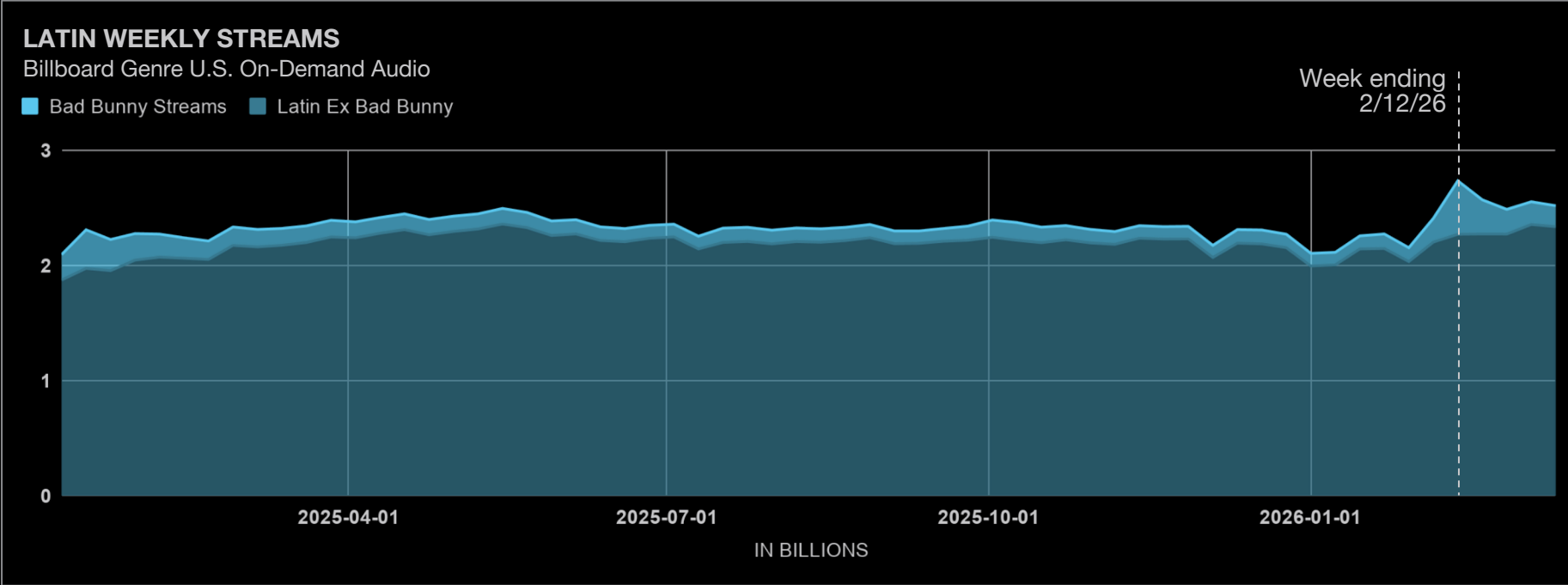
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Latin Music

Latin music reaches new heights

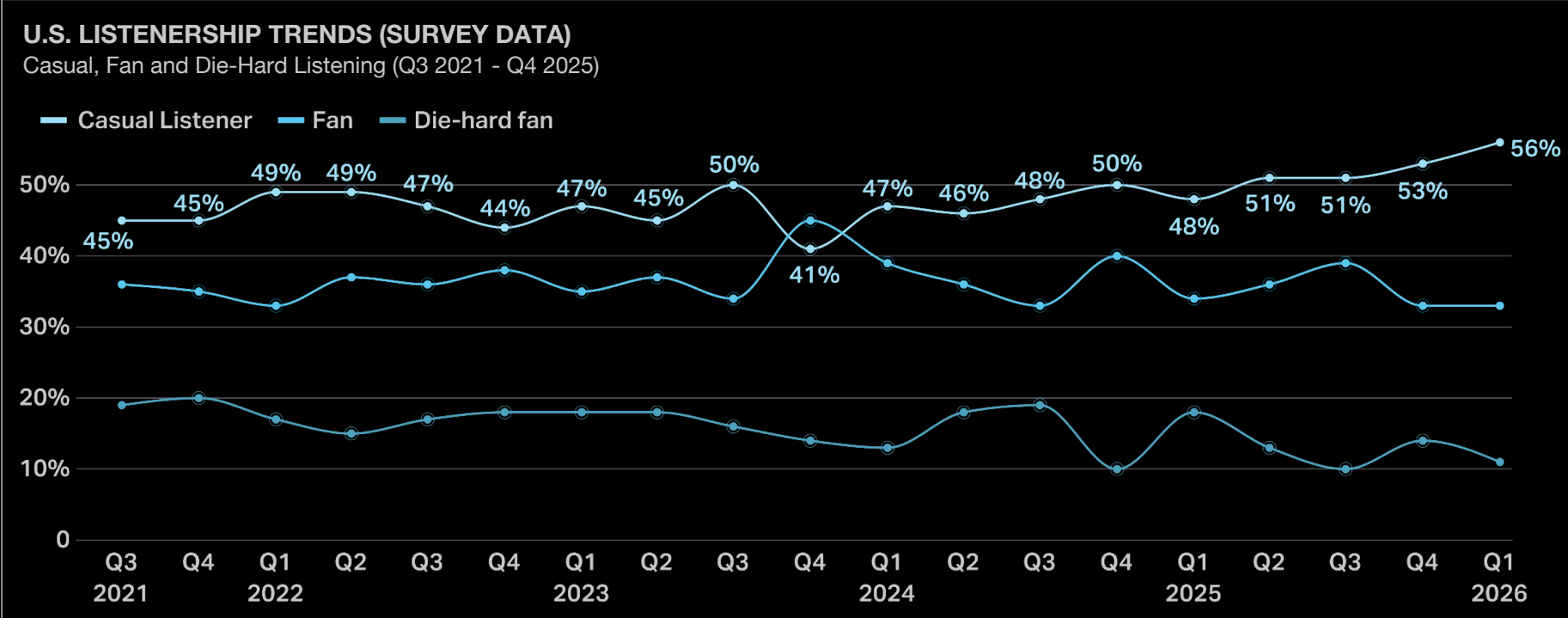
U.S. Latin Streaming Reaches All-Time High

Bad Bunny's Super Bowl performance drove Latin music U.S. On-Demand Audio (ODA) streaming to the genre's highest streaming week ever with 2.74B ODA streams the week ending 2/12/26.



Casual U.S. Listenership of Latin Grows Steadily

While fan (weekly) and die-hard (top “favorite” genre) listenership has remained somewhat steady, casual listenership (monthly) of the Latin genre has steadily grown since 2023, indicating the genre’s growing mainstream appeal.



SOURCE: LUMINATE INSIGHTS CONSUMER RESEARCH DATA

In the U.S., Nearly 1 in 10 Streams are Spanish Language

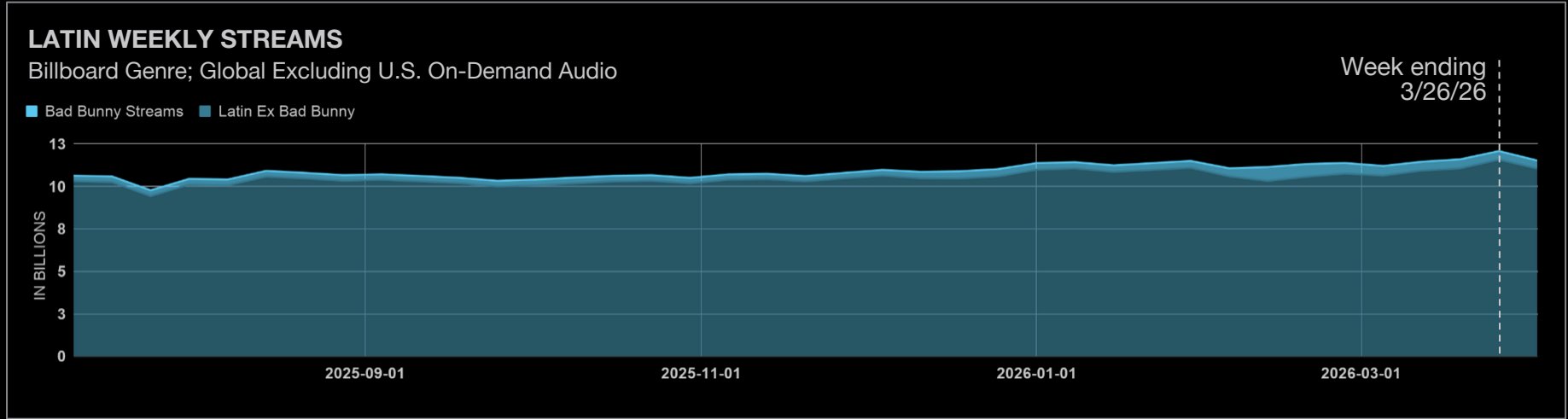
- Bad Bunny has helped drive U.S. streaming of Spanish language music to its highest share ever with nearly 1 in 10 audio streams. Korean language streaming is also up with Kpop successes that include BTS.
- This diversification has pulled from English language music consumption, which is down 2.1 share points so far in 2026 when compared to 2025. This follows a longer trend of English language music consumption decline.
- All Other languages outside of English, Spanish and Korean made up 3.4% of streaming in Q1 2026, a full 1.5 share points higher than in 2025 and a further indication of diversified streaming

	FY 2023	FY 2024	FY 2025	YTD 2026
English	88.80%	87.50%	88.10%	86.0%
Spanish	8.10%	9.40%	8.90%	9.5%
Korean	0.70%	0.70%	1.10%	1.1%
All Other	2.40%	2.40%	1.90%	3.4%



Global Latin Streaming Reaches All-Time High

Latin music streaming outside of Bad Bunny also reached its global high in Q1 2026 (specifically week ending 3/26/26) on the strength of new collaborative albums from Regional Mexican artists Tito Double P x Peso Pluma, and Junior H x Gael Valenzuela.



ARTIST	ALBUM	RELEASE DATE	Q1 2026 GLOBAL ODA
Tito Double P and Peso Pluma	<i>Dinastía</i>	12/25/25 (Deluxe Version Released 2/26/26)	1.66B
Junior H and Gael Valenzuela	<i>DEPR</i>3\$\$\$ED MFKZ</i>	2/26/26	450.9M





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Music Listeners in Brazil & Mexico

How and Where to reach Gen Z listeners and superfans

Gen Z Music Listeners in Brazil and Mexico

While Brazilian Gen Z demonstrate significantly high superfan rates, Mexican Gen Z are spending more time and money with music overall

GEN Z MUSIC CONSUMPTION BY MARKET

Item	Mexico (2025)	Brazil (2025)
Hours listened per month	68 hours (111)	52 hours (104)
Superfan rates	15% (95)	26% (126)
Streamers total	72% (90)	81% (98)
Premium streamers	52% (96)	59% (107)



Gen Z Superfandom in Brazil and Mexico

Superfandom is similar amongst Gen Z in Brazil and Mexico, however compared to their own local music listeners, Brazilian Gen Z are more likely to post about artists on social media and buy physical products.

GEN Z SUPERFAN BEHAVIORS BY MARKET:

Item	Mexico (2025)	Brazil (2025)
Attend an in-person live music performance	70% (102)	70% (112)
Purchase physical copies of music (e.g., vinyl, CDs, ect.)	26% (108)	26% (119)
Purchase digital copies of music (songs or albums)	23% (85)	29% (105)
Post about them on social media	21% (97)	33% (128)
Purchase physical merchandise	31% (103)	32% (120)
Talk about them with friends or family	28% (90)	40% (104)



Gen Z Digital Engagement in Mexico and Brazil

Gen Z in Brazil are using TikTok and Instagram at higher rates than the average listeners in their country. Shortform video platforms are also driving deeper music discovery opportunities amongst these audiences. However, there are signs that Gen Z in these territories use streaming platforms less than their fellow citizens (indicated by lower indexes). Luminate is fielding these territories again in 2026 and will update.

GEN Z DIGITAL ENGAGEMENT BY MARKET:

Item	Mexico (2025)	Brazil (2025)
Top Social Platforms	Tiktok — 53% (95) Instagram — 52% (102) Facebook — 50% (83)	Instagram — 70% (104) TikTok — 44% (119) WhatsApp — 40% (95)
Top Discovery Sources	Streaming services — 58% (92) Short form video — 56% (110) Social Media — 40% (100)	Streaming services — 62% (98) Short form video — 61% (124) Social Media — 49% (120)
Top Streaming Services	YouTube — 79% (95) Spotify — 73% (92) YouTube Music — 63% (91)	Spotify — 83% (99) YouTube — 80% (99) YouTube Music — 67% (94)

Takeaways

- **Q1 Streaming Trends**
 - Continued measured growth
- **Global Export Power**
 - Megastar Bad Bunny and BTS releases drive country and territory ranking shifts
- **Spotlight: Latin**
 - Growth continues, with nearly 1 in 10 streams in Spanish
- **Spotlight: GenZ Fans in Mexico and Brazil**
 - Consistent passion for music, different spend and discovery points
- **New and expanded visibility to come**
 - CONNECT for Music Publishing Works
 - DSP Breakout and US Market Share
 - AI Music designation



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