

LUMINATE

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MAY 2026 MUSIC BIZ

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# State of the Industry

## Current Global Consumption & Trends

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# Introduction



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# AGENDA

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01 Q1 2026 Global Metrics

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02 Global Export Power

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03 Latin Music Boom

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04 Music Listeners in Mexico and Brazil

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*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

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# Data Partnership Update

New Partner Updates for CONNECT

## Spotify Video

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Spotify video data broken out on-platform.

## Tencent

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

## Deezer

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Q2 launch targeted

# Luminate Roadmap Themes

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## 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

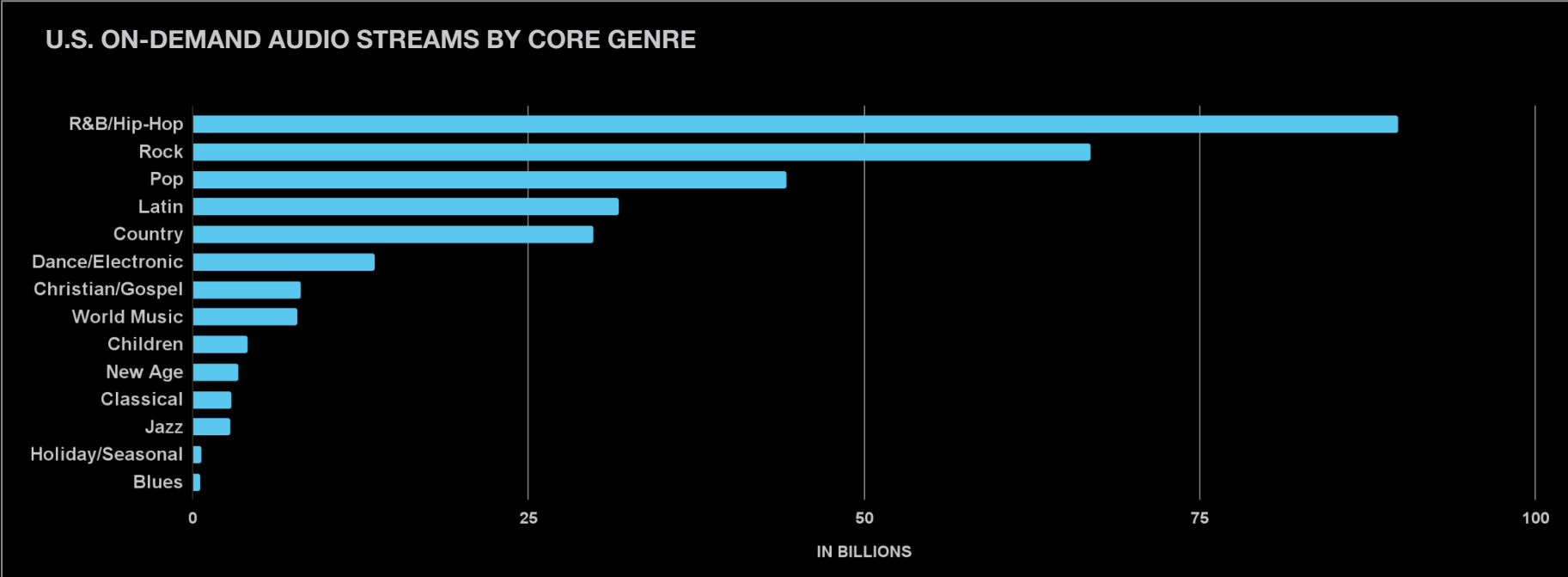


**3.4%**  
Q1 '26 vs. Q1 '25



# 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



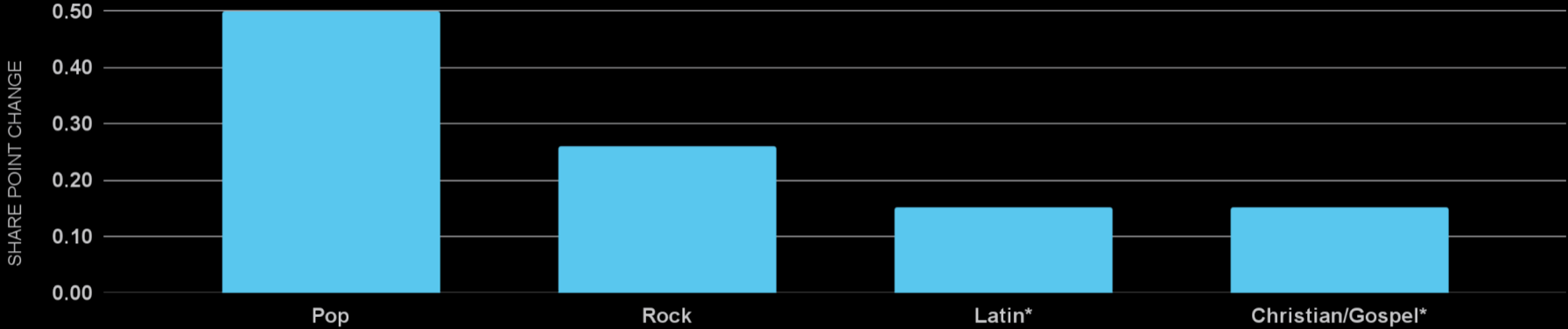
# U.S. Genre Trends Q1 2026

- 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                        |

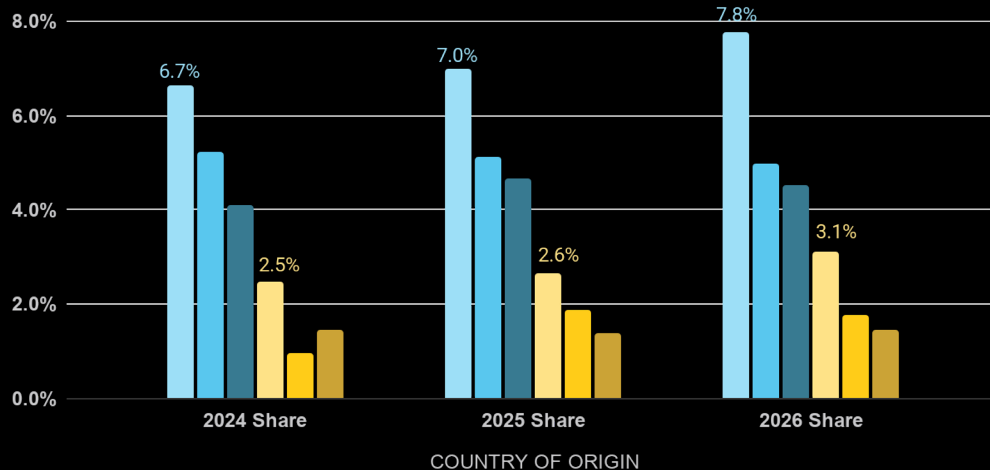
# U.S. Streaming by Country / Territory of Origin

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)



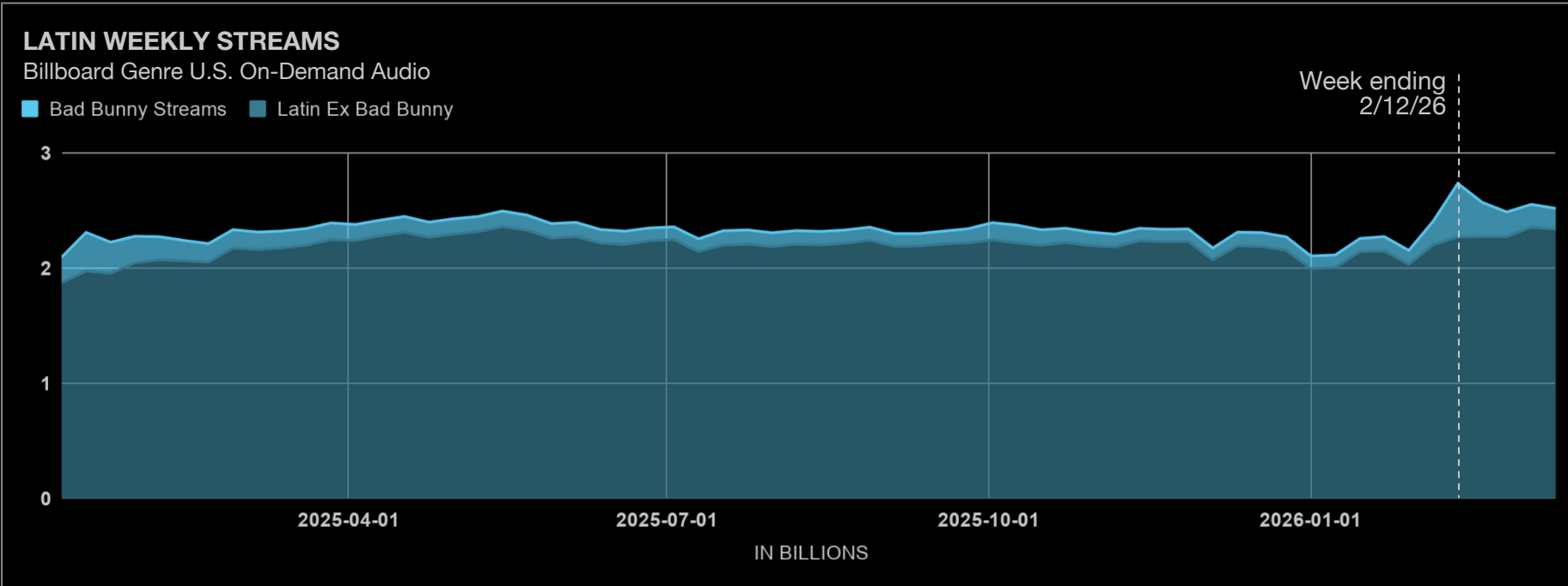
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# Latin Music

Latin music reaches new heights

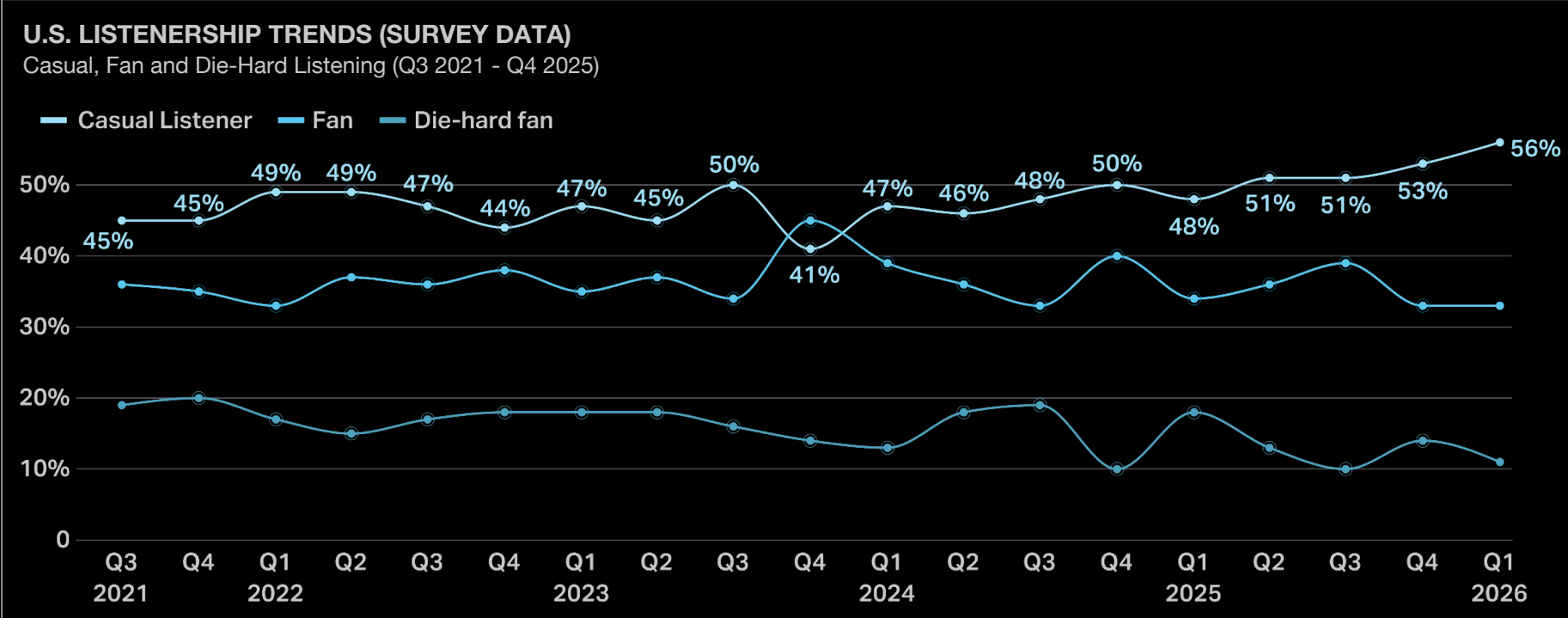
# U.S. Latin Streaming Reaches All-Time High

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

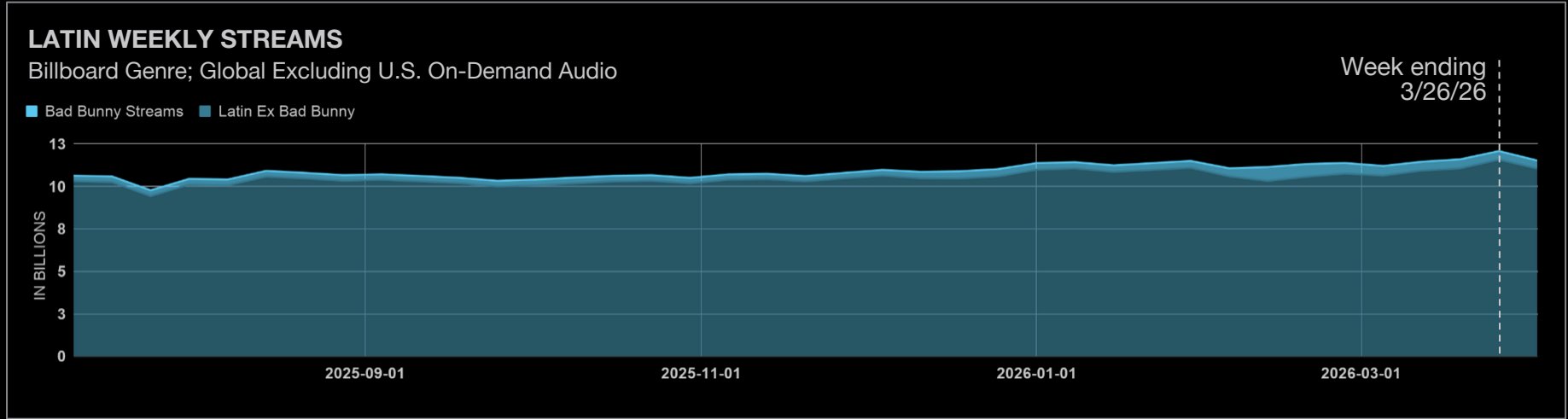
- Bad Bunny has helped drive U.S. streaming of Spanish language music to its highest share ever with nearly 1 in 10 audio streams. Korean language streaming is also up with Kpop successes that include BTS.
- This diversification has pulled from English language music consumption, which is down 2.1 share 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) | <b>1.66B</b>       |
| Junior H and Gael Valenzuela | <i>DEPR&lt;/i&gt;3\$ED MFKZ</i> | 2/26/26                                    | <b>450.9M</b>      |





/04

# 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)   |
|-------------------------------|---|---|
| <b>Top Social Platforms</b>   | Tiktok — 53% (95)<br>Instagram — 52% (102)<br>Facebook — 50% (83)                         | Instagram — 70% (104)<br>TikTok — 44% (119)<br>WhatsApp — 40% (95)                        |
| <b>Top Discovery Sources</b>  | Streaming services — 58% (92)<br>Short form video — 56% (110)<br>Social Media — 40% (100) | Streaming services — 62% (98)<br>Short form video — 61% (124)<br>Social Media — 49% (120) |
| <b>Top Streaming Services</b> | YouTube — 79% (95)<br>Spotify — 73% (92)<br>YouTube Music — 63% (91)                      | Spotify — 83% (99)<br>YouTube — 80% (99)<br>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





Thank You!

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