



MIDYEAR

REPORT



TRENDS IN MUSIC, TV & FILM
— 2026

LUMINATE





Introduction



Rob Jonas / CEO, Luminate

This is the first Luminate Midyear Report to combine Music and Film & TV under one cover. That’s because the music industry wants a clearer read on streaming television and theatrical performance; film and TV companies are asking for the reverse.

On the music side, Global On-Demand Audio streams grew 9.8 percent in H1 2026, while the ex-U.S. figure grew faster still, by 11.8 percent. Genre is where that growth is being redistributed. While R&B/Hip-Hop continues to set the U.S. audio streaming pace with approximately 1 in every 4 streams, it faces increased competition from growth genres such as Dance/Electronic. A Luminate analysis of the Billboard 200 shows that R&B/Hip-Hop fell to 30% of chart consumption this half, down from 41% in H1 2023. The Latin and Country genres picked up the difference, with Bad Bunny’s album and Super Bowl performance in February driving Latin music U.S. On-Demand Audio (ODA) streaming to its highest week ever, at 2.74B ODA streams (week ending 2/12/26).

CD sales surged 16 percent to 16.3 million units, outpacing vinyl’s modest 2.4 percent growth, thanks largely to BTS’ *ARIRANG*. Strip out BTS and the wider K-pop catalog, and CD sales still grew by 6.7 percent, helped along by 60 percent of Gen Z listeners now saying they most listen to music from the 1990s or earlier, up from just 18 percent in 2021. That same *ARIRANG* effect carried South Korea to third in Luminate’s Export Power Rankings.

AI-generated music is no longer a novelty at the margins, either. Breaking Rust’s “Livin’ on Borrowed Time” leads specifically in the U.S., where 58.7 percent of its activity originates, an early signal that American listeners are engaging with AI music on its own terms rather than importing someone else’s hit.

Fandom itself maps unevenly across genres. K-pop fans lead the industry in both purchase and engagement behavior, Indie Rock and EDM show similarly dense high-value pockets, while Country and Pop skew toward a more lean-back, consumption-heavy audience.

On the Film & TV side, the leveling we have been watching for two years continues. Netflix’s share of U.S. original viewing time sits at 57 percent, still commanding but down further from H1 2025. Library content keeps doing the heavier lifting, with roughly 19,000 library titles available across major U.S. platforms against 7,000 originals, pulling in nearly four times the streaming hours. New series production kept shrinking, too, with U.S. TV premieres down to 517 this half from 930 in 2022, even as free streaming services picked up some of the slack SVOD left behind.

The clearest proof the two businesses are converging sits in our own documentary data. *The Rise of the Red Hot Chili Peppers: Our Brother, Hillel* drove an 11% jump in the group’s U.S. streams and an 8% jump globally the week the film landed on Netflix. Read together rather than apart, these numbers describe one combined industry, where an artist’s chart trajectory or Export Power Ranking can be inextricably linked to how a documentary about the artist performs on streaming or at the box office. That is why this report treats Music and Film & TV as one story rather than two.

About Luminate

Luminate is the entertainment industry’s most trusted data partner, delivering the most essential, objective and trustworthy insights to drive businesses forward across music, film and television. Operating at the intersection of technology and creativity, Luminate manages 30 trillion data points from hundreds of verified sources and is globally recognized for its AI achievements. The company’s products and expert consultative services offer unparalleled cultural significance, consistently fueling Billboard’s authoritative music charts for over 30 years, driving Variety’s Streaming Originals charts and acting as an official data source for the Golden Globes. Luminate is an independently operated company, a subsidiary of PME TopCo., a joint venture between Penske Media Corporation and Eldridge.



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- MARKET DIVERSITY
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MUSIC CONSUMPTION METRICS

Global Music Metrics

2025* 2026*

GLOBAL ON-DEMAND AUDIO SONG STREAMS



+9.8%
Volume Change

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



+11.8%
Volume Change

SOURCE: LUMINATE MUSIC CONSUMPTION DATA; *1/2/26-7/2/26 VS. 1/3/25-7/3/25

U.S. Music Metrics

2025* 2026*

U.S. TOTAL ALBUM CONSUMPTION+

Album equivalents**



+4.4%
Volume Change

U.S. ON-DEMAND AUDIO SONG STREAMS



+4.8%
Volume Change

U.S. TOTAL PHYSICAL ALBUM SALES+

LP, CD and cassette



+7.8%
Volume Change

SOURCE: LUMINATE MUSIC CONSUMPTION DATA; *1/2/26-7/2/26 VS. 1/3/25-7/3/25; ALERT: NEW RATIO FOR SEA (STREAM-EQUIVALENT ALBUMS): 1,000 PREMIUM STREAMS=ONE ALBUM, 2,500 AD-SUPPORTED STREAMS=ONE ALBUM; TEA (TRACK-EQUIVALENT ALBUMS): 10 DIGITAL TRACKS=ONE ALBUM; **FOR HISTORICAL EQUIVALENT TRENDING, H1 2025 EQUIVALENT NUMBERS IN THIS REPORT REFLECT UPDATED 2.5:1 RATIO; SEE METHODOLOGY SECTION AT BACK OF REPORT FOR MORE INFO

Canada Music Metrics

2025* 2026*

CANADA TOTAL ALBUM CONSUMPTION

Album equivalents**



+3.2%
Volume Change

CANADA ON-DEMAND AUDIO SONG STREAMS



+3.6%
Volume Change

CANADA TOTAL PHYSICAL ALBUM SALES

LP, CD and cassette



+4.2%
Volume Change

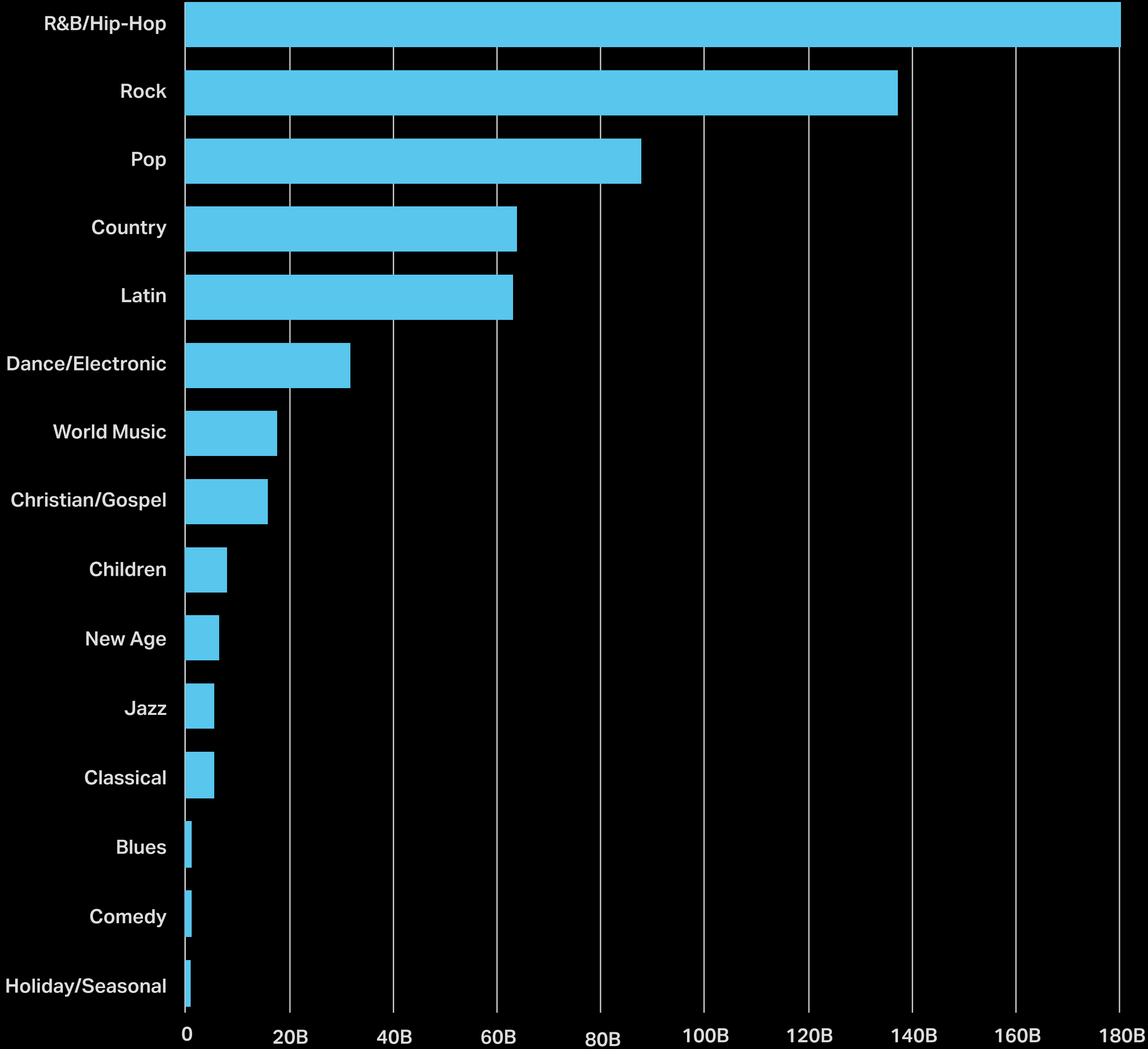
SOURCE: LUMINATE MUSIC CONSUMPTION DATA; *1/2/26-7/2/26 VS. 1/3/25-7/3/25; ALERT: NEW RATIO FOR SEA (STREAM-EQUIVALENT ALBUMS): 1,000 PREMIUM STREAMS=ONE ALBUM, 2,500 AD-SUPPORTED STREAMS=ONE ALBUM; TEA (TRACK-EQUIVALENT ALBUMS): 10 DIGITAL TRACKS=ONE ALBUM; **FOR HISTORICAL EQUIVALENT TRENDING, H1 2025 EQUIVALENT NUMBERS IN THIS REPORT REFLECT UPDATED 2.5:1 RATIO; SEE METHODOLOGY SECTION AT BACK OF REPORT FOR MORE INFO

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VITAL STATS

Beyond the macro consumption volume figures lies a core set of foundational benchmarks and KPIs that map the current trajectory of the global music industry. Tracking metrics relating to the highest-growth genres, the enduring appeal of catalog songs and shifts in the physical landscape provide the essential baseline for analyzing the defining trends of 2026 so far.

U.S. ON-DEMAND AUDIO STREAMS, BY MAIN GENRE



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



DON TOLIVER

CREDIT: DANIEL PRAKOPCYK

R&B/Hip-Hop sets the pace, but competition grows.

While the R&B/Hip-Hop genre accounts for approximately 1 in every 4 U.S. On-Demand Audio streams, its share of the industry has continued to decline in recent years, as it lost 1.6 share points compared with last year at this time. The Country and Latin music genres continue the side-by-side growth seen in recent years, and while Bad Bunny's latest album and Super Bowl performance was a key driver for the genre, Country music ultimately ranked as the fourth largest genre through the first half of 2026. Artists including breakout Country star Ella Langley and the aforementioned Bad Bunny are continuing indicators that these genres are impacting younger, culture-led fans.



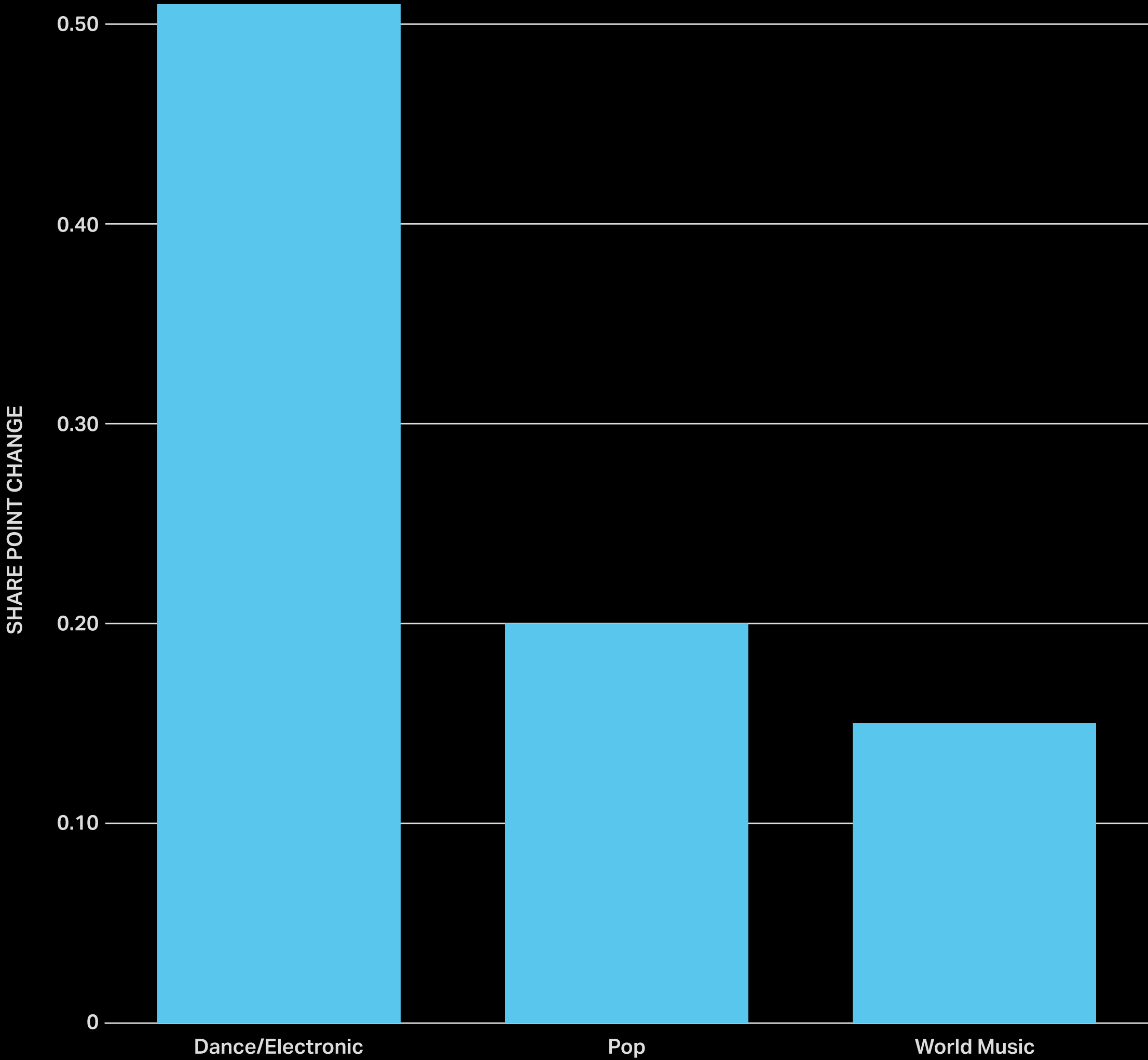
JOHN SUMMIT
CREDIT: IZZY NUZZO

Dance/Electronic, Pop and World Music grow their streaming share the most.

Dance/Electronic (+18.9% year-over-year On-Demand Audio volume change) has surged as the largest U.S. growth genre for H1 2026 through a mix of new releases and catalog hits. While John Summit and Disco Lines are leading the charge with current hits, a massive boom in catalog streaming driven by viral nostalgia has pushed releases from the 2015–17 era into half of the Top 10 spots. Pop (+6.5%) secures second place, with Justin Bieber, Olivia Dean and Harry Styles driving the genre to a +.20 share point change. Additionally, BTS’ new album *ARIRANG* is categorized as both Pop and K-pop due to its English and Korean tracks, acting as a growth driver for both genres. The World Music genre upped its share by .15 points on the strength of +11.9% year-over-year growth.

H1 2026 TOP GROWTH GENRES

Billboard Genres, On-Demand Audio, ranked by share point change in H1 2026 vs. H1 2025



SOURCE: LUMINATE MUSIC CONSUMPTION DATA

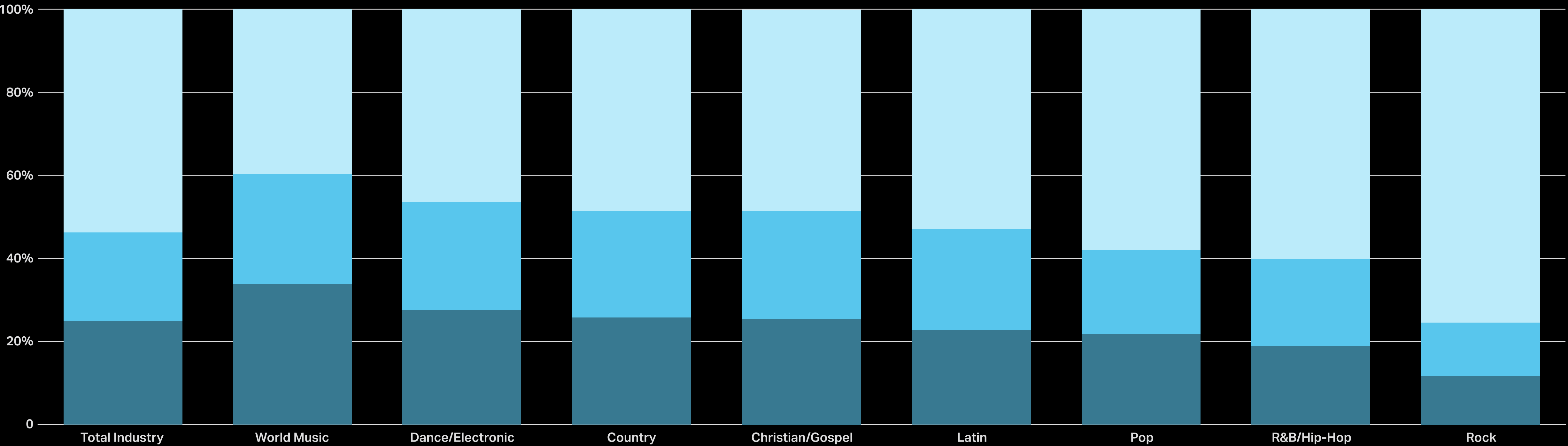
World Music leads Release Age streaming share of tracks 60 months old or newer.

The World Music genre is the most Current, as it leads in streaming of tracks that are 0-18 months old (34%) as well as those 18-60 months (26.5%). Though Rock has grown its overall streaming share in recent years, the genre’s Deep Catalog continues to expand, with now 75% of Rock activity from tracks older than 60 months, a substantial +5pp change from the midyear point in 2025.

U.S. ON-DEMAND AUDIO STREAMING IN 2026, WEEKS 1-26

Main genre share of U.S. audio streaming that is Current, Catalog and Deep Catalog

Current (0-18 mos.) Catalog (18-60 mos.) Deep Catalog (60+ mos.)



SOURCE: LUMINATE MUSIC CONSUMPTION DATA

TOTAL U.S. PHYSICAL ALBUM SALES, BY STRATA

Strata	Share 2026	Share 2025	Share Point Change
Independent	32.1%	36.6%	-4.45
Mass Market	28.7%	23.3%	5.41
E-Commerce	26.1%	27.4%	-1.30
Direct to Consumer	10.2%	10.2%	-0.03
Non-Traditional	1.7%	1.5%	0.28
Venue	1.1%	1.1%	0.08

TOP MASS-MARKET ALBUM TITLES, WEEKS 1-26, 2026

Artist	Title	Physical Sales at Mass Market
BTS	<i>ARIRANG</i>	727.0K
ENHYPEN	<i>THE SIN : VANISH</i>	229.8K
ATEEZ	<i>GOLDEN HOUR: PART.4</i>	194.0K

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



ENHYPEN

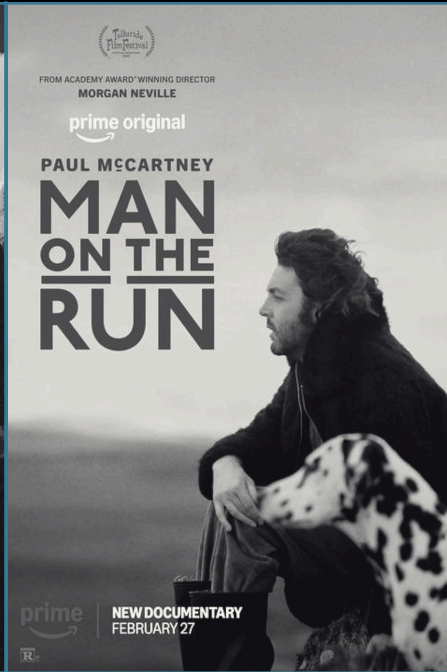
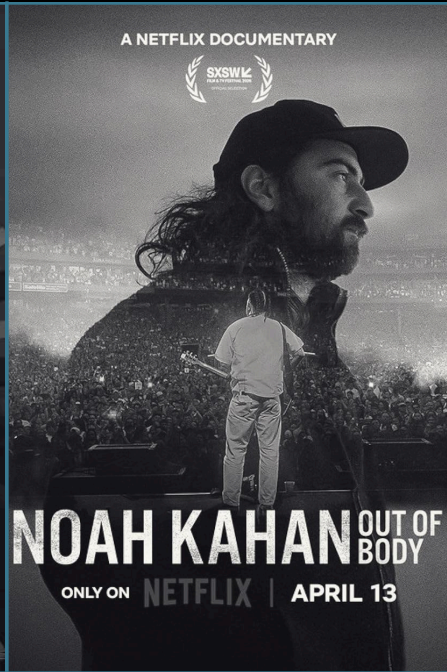
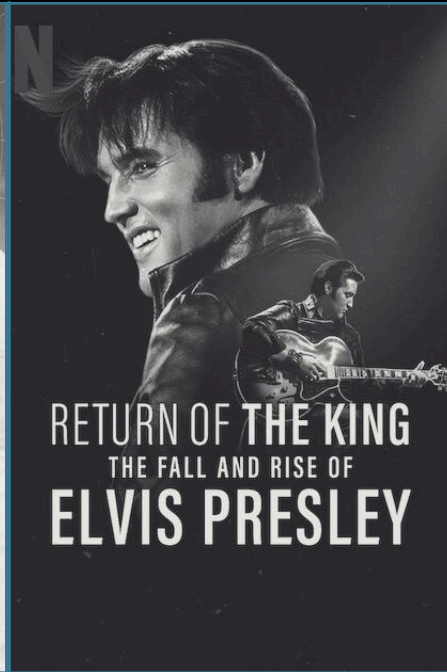
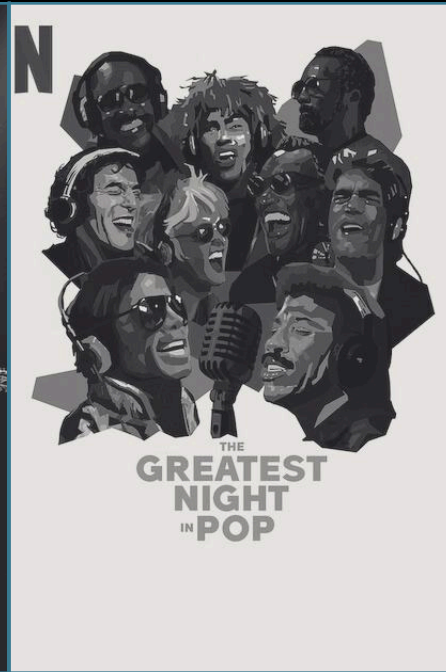
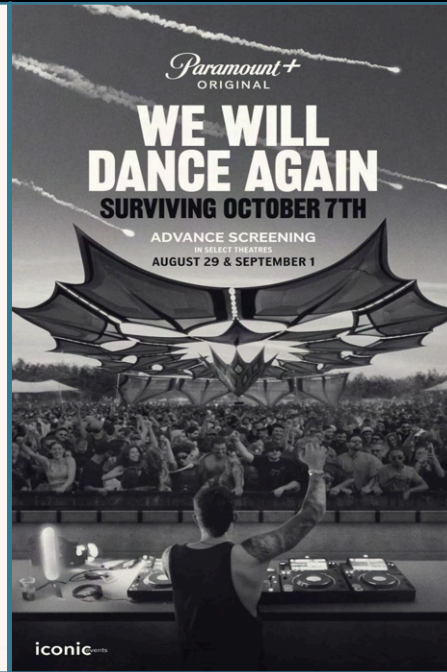
CREDIT: GILBERT FLORES

Mass Market helps to drive fandom culture.

While indie retail continues to lead all strata in share of physical sales, Mass Market (e.g., Target, Walmart et al.) showed the largest gain over its H1 2025 performance to capture nearly 30% of the market. Notably, K-pop-aligned artists, including BTS, ENHYPEN and ATEEZ, lead in Mass Market sales, as the purchase of physical collectibles is core to the genre's fandom. This jump in share pulled most notably from indie retail as well as e-commerce (Amazon, TikTok Shop).

Seven of the Top 10 original music docs rank in the list of Top 50 documentaries overall.

The Rise of the Red Hot Chili Peppers: Our Brother, Hillel on Netflix ranks No. 1 in the U.S., driving the group’s catalog to a quick +11% gain in U.S. On-Demand Audio streams (+3.4M) and +8% global (+7.4M) gain the week it was released.

										
	<i>The Rise of the Red Hot Chili Peppers: Our Brother, Hillel</i>	<i>Man on the Run</i>	<i>Lainey Wilson: Keepin' Country Cool</i>	<i>Noah Kahan: Out of Body</i>	<i>Earth, Wind & Fire (to be Celestial vs. That's the Weight of the World)</i>	<i>Return of the King: The Fall and Rise of Elvis Presley</i>	<i>The Greatest Night in Pop</i>	<i>BTS: The Return</i>	<i>We Will Dance Again</i>	<i>Miss Americana</i>
Music Doc Rank	1	2	3	4	5	6	7	8	9	10
Overall Doc Rank	12	13	27	33	41	43	45	56	78	103
Minutes Watched	286.2M	284.8M	131.8M	105.7M	74.3M	67.2M	63.3M	45.0M	26.8M	17.8M
Release Date	3/20/26	2/13/25	4/22/26	4/13/26	6/7/26	11/13/24	1/29/24	3/27/26	9/24/24	1/31/20
Platform	Netflix	Prime Video	Netflix	Netflix	HBO Max	Netflix	Disney+	Netflix	Paramount+	Netflix

SOURCE: LUMINATE STREAMING VIEWERSHIP (M)

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MARKET DIVERSITY

The music ecosystem is undergoing a shift as the historical dominance of English-language tracks steadily declines. In the U.S., streaming consumption is continuing to diversify, highlighted by nearly 1 in 10 streams being in Spanish. This transformation is led by global icons such as Bad Bunny and BTS, who captured the American mainstream in 2026. While European markets lead the world in borderless streaming diversity, insular regions including Japan and Brazil prove localized music scenes are thriving independently. For labels and brands, navigating this landscape means recognizing that modern music success is no longer anchored to a single language but driven by hyper-engaged global communities.

U.S. STREAMING SHARE, BY LANGUAGE

Top 10K tracks, Total On-Demand (Audio + Video) streams

	FY 2023	FY 2024	FY 2025	Weeks 1-21, 2026
English	88.8%	87.5%	88.1%	87.1%
Spanish	8.1%	9.4%	8.9%	9.4%
Korean	0.7%	0.7%	1.1%	1.1%
All Other	2.4%	2.4%	1.9%	2.4%



In the U.S., nearly 1 in 10 streams are Spanish language.

Through the first half of 2026, the U.S. music streaming ecosystem continued to diversify, as English-language consumption fell to a new low of 87.1%. Concurrently, Spanish-language music matched its historical peak at 9.4% of U.S. On-Demand Audio streams, while long-tail languages outside of English, Spanish and Korean reclaimed their footprint of 2.4% after a 2025 dip.

This shift demonstrates that non-English repertoire is no longer a niche sub-segment but a permanent, growing pillar of mainstream domestic consumption, requiring domestic labels to increasingly focus marketing resources on multilingual and localized discovery.

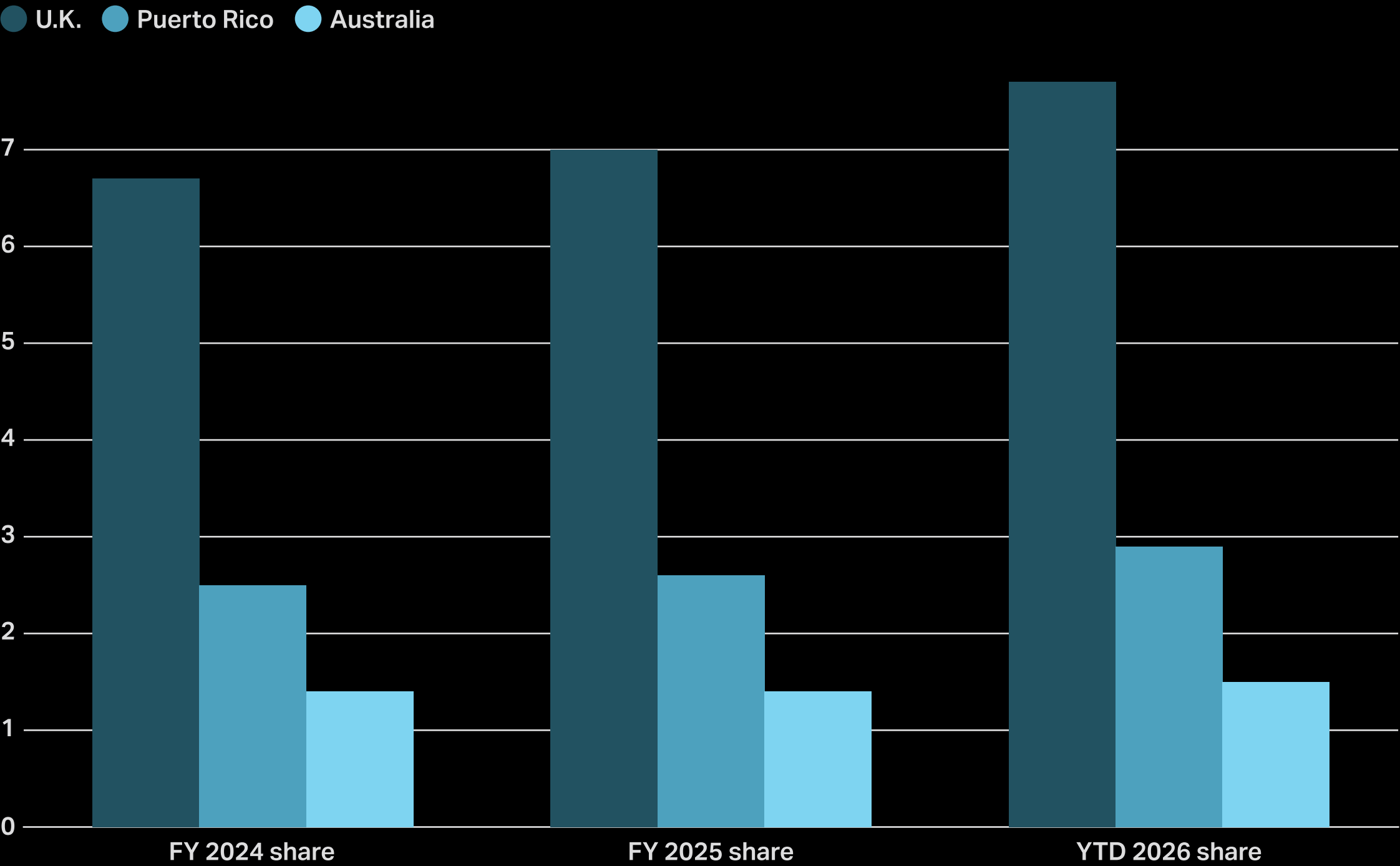
SOURCE: LUMINATE MUSIC CONSUMPTION DATA

The United Kingdom gains the most as U.S. streaming ecosystem grows more diverse.

While American artists still command over two-thirds of U.S. streams, international talent is capturing greater market share. Driven by breakout artists and superstars including the United Kingdom’s Olivia Dean and Puerto Rico’s Bad Bunny, the U.K. grew its U.S. streaming share by +0.8 percentage points, to 7.8%, while Puerto Rico climbed to 2.9% and Australia saw notable gains. The decline of the domestic market share advantage highlights a flatter global playing field, where artists from anywhere in the world can leverage global DSP streaming services to compete directly in the U.S.

SHARE OF COUNTRY / TERRITORY OF ORIGIN

U.S. On-Demand Audio; Top 3 countries ranked by share growth in YTD 2026 vs. FY 2025 (excl. continental U.S.)



BAD BUNNY

Top Puerto Rican artist in the U.S.
(Overall rank: 4)



OLIVIA DEAN

Top U.K. artist in the U.S.
(Overall rank: 21)



TAME IMPALA

Top Australian artist in the U.S.
(Overall rank: 76)

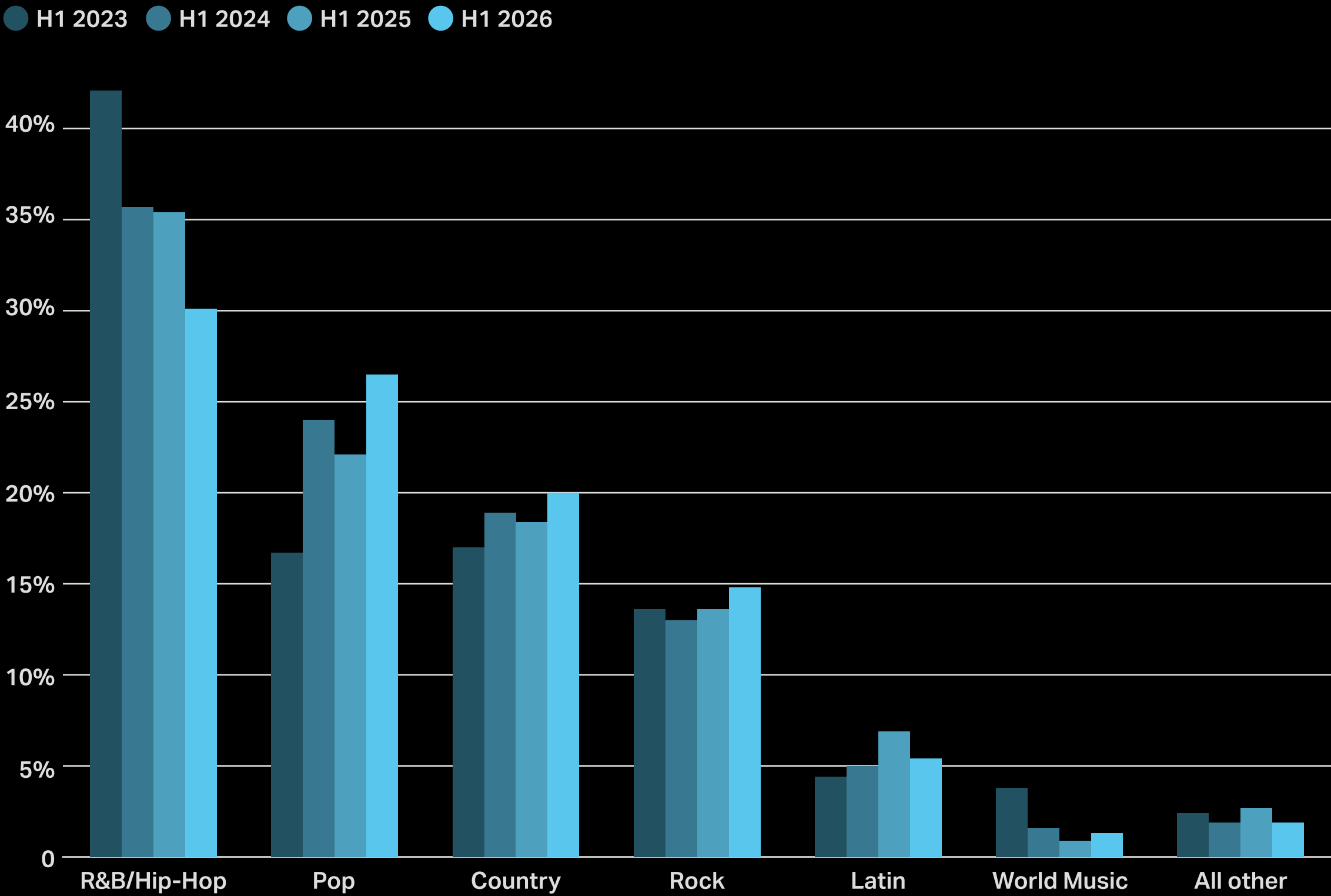
SOURCE: LUMINATE MUSIC CONSUMPTION DATA; PHOTO CREDITS: BAD BUNNY: DIWANG VALDEZ; DEAN: RYAN WILLIAMS; TAME IMPALA: JULIAN KLINCEWICZ

Diversification is also seen in genre consumption on the Billboard 200 albums chart.

A structural realignment can be noted on the U.S. Billboard 200 album charts, where R&B/Hip-Hop has experienced the sharpest decline in equivalent share since 2023. This loss has been directly captured by a broad coalition of gaining genres, most notably Pop, Country, Rock and Latin.

U.S. BILLBOARD 200 SHARE, BY MAIN GENRE

Total album equivalents

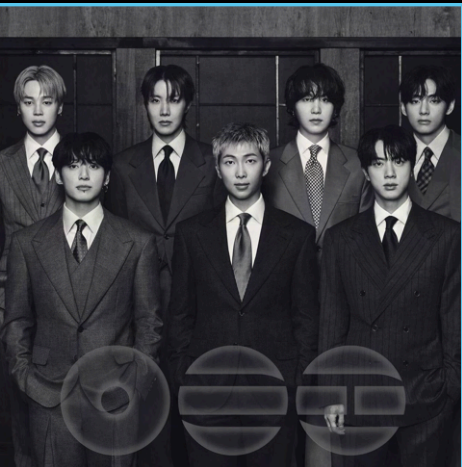


TOP 2026 ALBUMS IN SELECT GENRES

POP

ARIRANG,
BTS

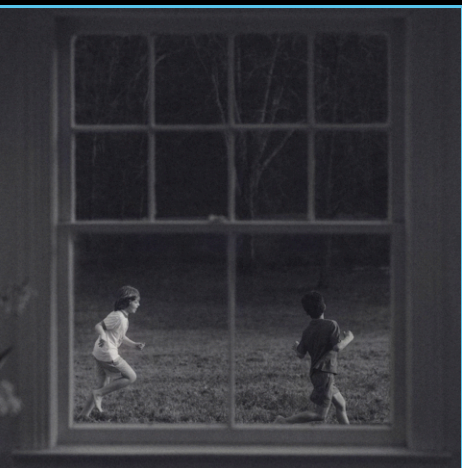
TOTAL EQUIVALENTS
1.49M



ROCK

The Great Divide,
Noah Kahan

TOTAL EQUIVALENTS
1.35M



COUNTRY

I'm The Problem,
Morgan Wallen

TOTAL EQUIVALENTS
2.04M



LATIN

DeBÍ TIRAR Más FOToS,
Bad Bunny

TOTAL EQUIVALENTS
1.54M



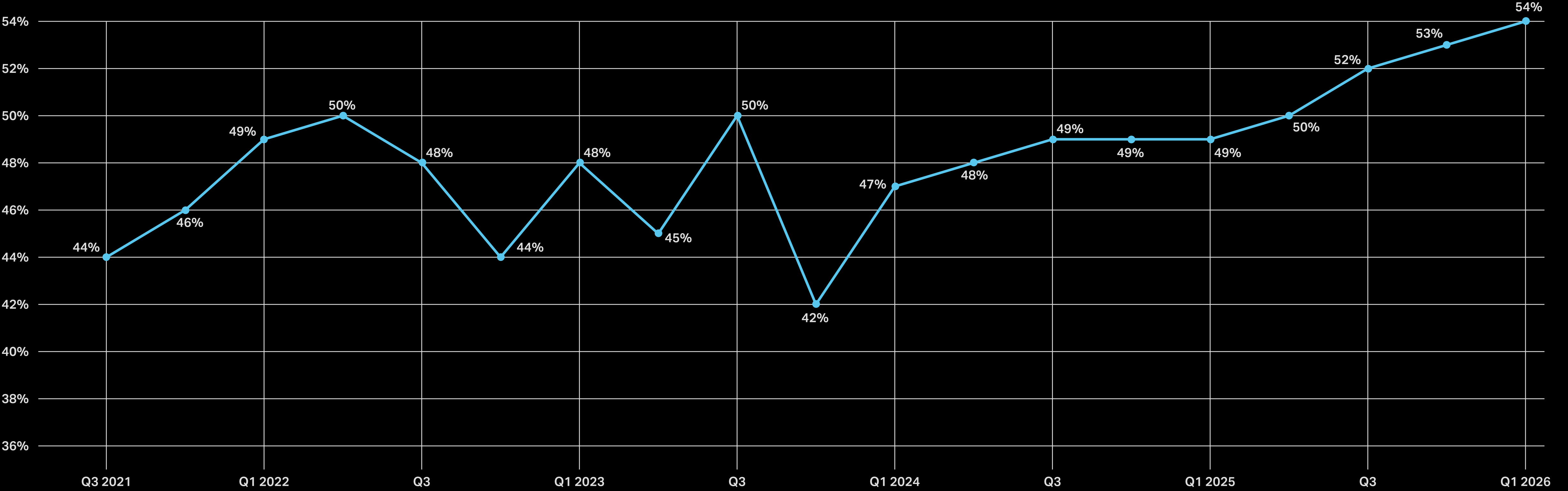
SOURCE: LUMINATE MUSIC CONSUMPTION DATA, ANALYSIS OF BILLBOARD 200 U.S. ALBUMS CHART; GENRES BASED ON MAIN GENRE ASSIGNMENTS, AS NOTED IN LUMINATE CONNECT; GENRE SHARES ARE MUTUALLY EXCLUSIVE, AS AN ALBUM CAN ONLY HAVE ONE MAIN GENRE

Casual U.S. listenership of Latin grows steadily.

U.S. casual monthly listenership of the Latin genre has experienced consistent long-term growth, climbing to a peak of 54% in Q1 2026. This indicates a profound expansion of the genre’s footprint beyond its traditional base into the broader American cultural mainstream. The steady rise in casual listening is a key driver of the genre’s growth and transforms Latin music into an exceptionally lucrative canvas for mass-market brands, offering massive, cross-cultural reach that traditional English-centric campaigns can no longer replicate on their own.

U.S. LISTENERSHIP TRENDS: LATIN GENRE

Percent of U.S. music listeners who are “casual” Latin genre listeners

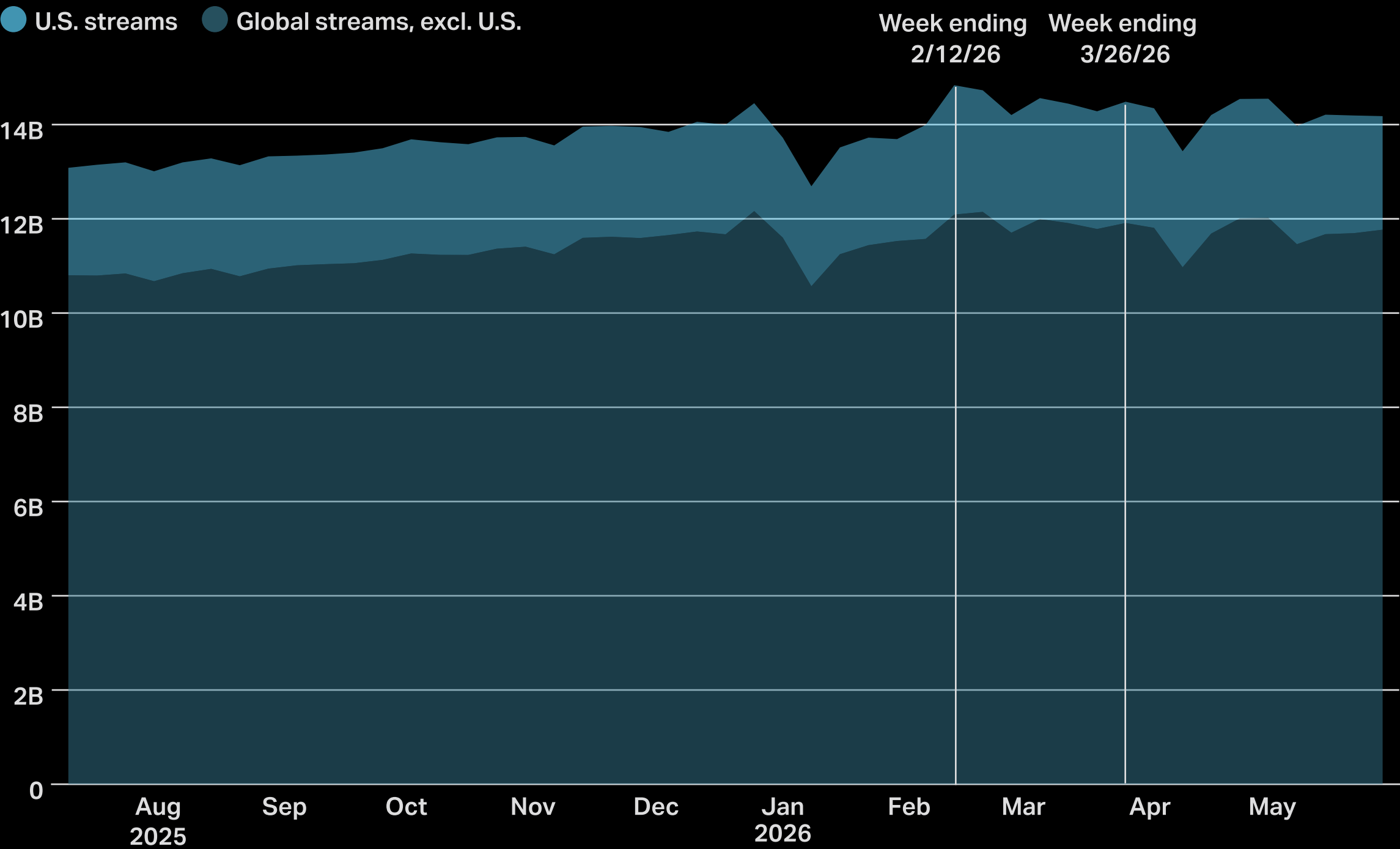


SOURCE: LUMINATE ARTIST + GENRE TRACKER

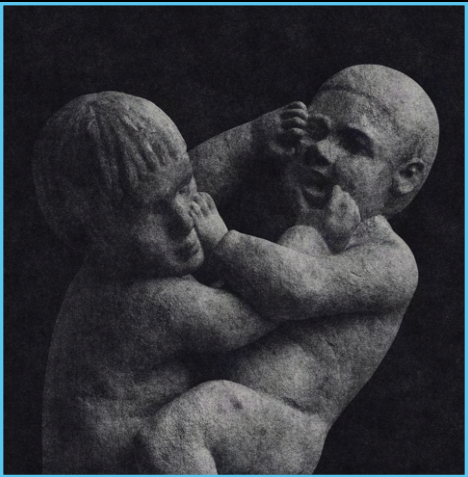
Global Latin streaming reaches all-time high.

Global Latin music streaming reached unprecedented heights in early 2026, catalyzed by Bad Bunny’s Super Bowl performance, which drove a record-breaking 2.74 billion U.S. On-Demand Audio streams in a single week. Outside of this flagship catalyst, the broader genre achieved separate global highs driven by massive collaborative Regional Mexican album releases from artists such as Tito Double P, Peso Pluma, Junior H and Gael Valenzuela. This simultaneous performance proves that Latin music's global growth engine is running on two powerful, independent tracks: massive, singular pop culture events and a deep, highly collaborative streaming ecosystem within regional subgenres.

LATIN WEEKLY ON-DEMAND AUDIO STREAMS



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



TITO DOUBLE P & PESO PLUMA

ALBUM: *DINASTÍA*

RELEASE DATE: 12/25/25 (DELUXE 2/26/26)

YTD GLOBAL ODA: 2.46B



JUNIOR H & GAEL VALENZUELA

ALBUM: *DEPR</3\$\$\$ED MFKZ*

RELEASE DATE: 2/26/26

YTD GLOBAL ODA: 763M



ZARA LARSSON
CREDIT: SAMI DRASIN

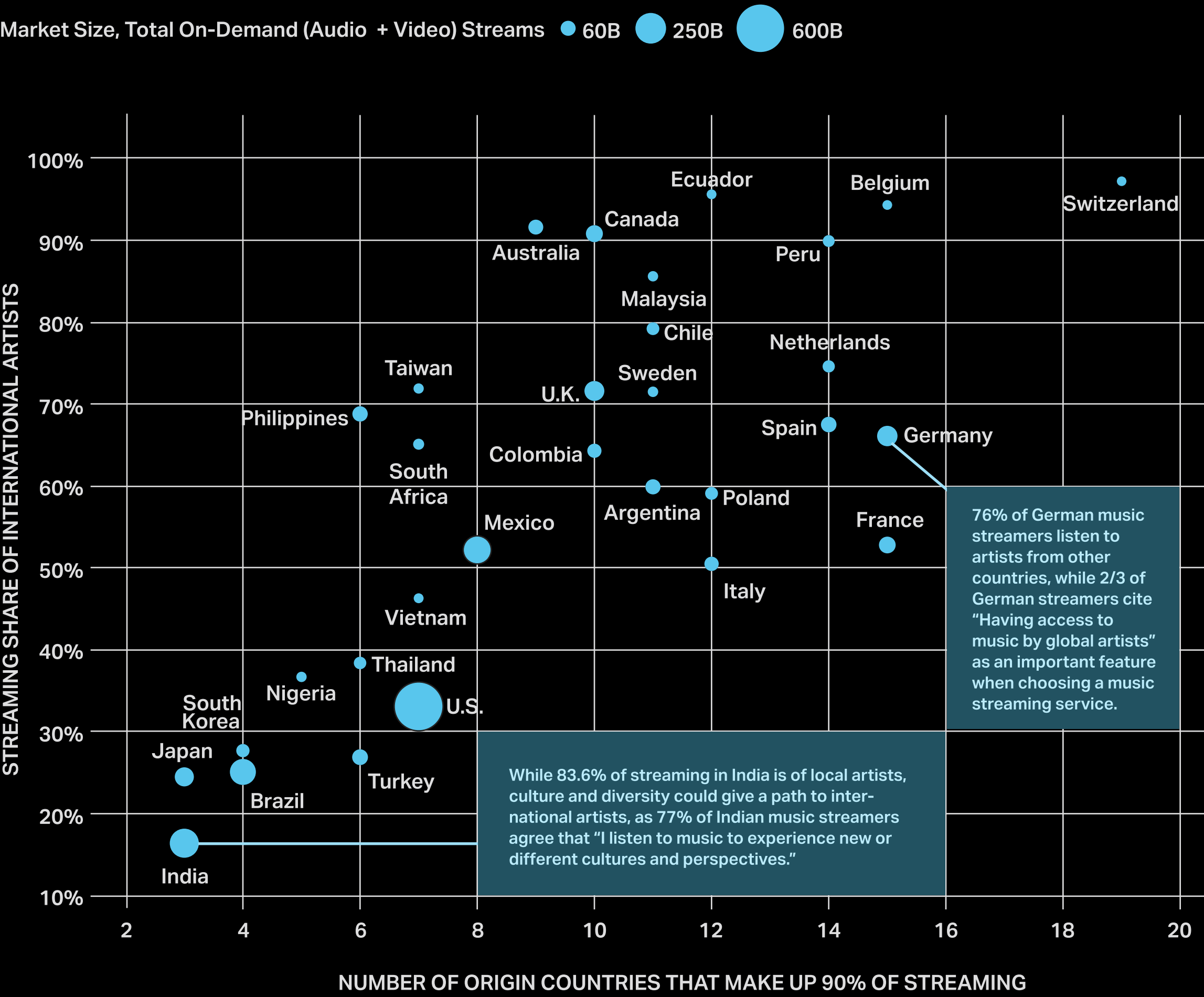
Europe shows greatest diversity in streaming behavior.

A global analysis of streaming diversity reveals that European nations — led by Switzerland, Belgium and Germany — possess the most heterogeneous music ecosystems. Conversely, powerhouse markets including India, Japan, South Korea and Brazil are the least diverse, as dominant local music scenes satisfy a majority of domestic demand.

For international strategists, this bifurcated landscape means export efforts should target high-diversity European hubs, while strategies for insular markets such as India or Japan must pivot toward investing in and partnering with localized domestic talent pools.

DIVERSIFICATION OF MUSIC MARKETS

Top 10K artists per country, ranked by Total On-Demand streaming in YTD 2026.
Read as: Approximately 33% of streams in the U.S. come from international artists, while 90% of U.S. streaming is driven by seven countries.



SOURCE: LUMINATE MUSIC CONSUMPTION DATA, LUMINATE GLOBAL MUSIC 360;
EXCLUDES COUNTRIES WITH LESS THAN 10 BILLION YTD ON-DEMAND STREAMS

GLOBAL EXPORT POWER RANKINGS, H1 2026

Highlighted items indicate changes vs. FY 2025

Rank	Country / Territory	Top Importer 1	Top Importer 2	Top Importer 3
01	United States	Canada	Australia	New Zealand
02	United Kingdom	United States	Australia ↑	Ireland ↓
03	South Korea ↑	Japan ↑	Taiwan ↓	United States ↑
04	Canada ↓	United States	United Kingdom	Australia
05	Germany	Austria	Switzerland	Turkey ↑
06	France	Belgium	Switzerland	Lebanon ↑
07	Puerto Rico	United States	Mexico	Spain
08	Brazil ↑	Portugal	Bolivia	Argentina
09	Australia ↓	United States	United Kingdom ↑	Canada
10	Sweden	United States	Germany ↑	United Kingdom ↑

GLOBAL EXPORT POWER RANKINGS FORMULA

Rank of artists in each country based on Total On-Demand streaming and country of origin

+

Number of countries importing music from a given export country

+

Streaming size of importing countries

+

Number of artists per export country reaching international audiences

South Korea rises in Export Power Rankings on the heft of BTS’ global success.

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/Territory of Origin; number of countries importing music from a given export market; streaming size of importing countries; and number of artists per export market reaching international audiences.

The global success of BTS’ *ARIRANG* drives South Korea to its position as the third-largest music exporter, with the U.S. being the largest importer of Korean music. Brazil also moves up as Alok and Anitta help drive the global share. This marks another jump for Brazil, which ranked 9th in 2025 after ranking 10th in 2024, and speaks to the market’s growing international opportunities.

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

/ 01 MUSIC

MAJORS, INDIES, MUSICIANS & CREATORS

The music industry is navigating a democratization wave, as lowered digital distribution barriers continue to fuel an unprecedented volume of independent track releases on global streaming platforms. Independent distributors are successfully chipping away at major-label dominance, expanding both their physical track presence and their total streaming share across nearly every consumption tier. This long-tail expansion is amplified by a rising class of domestic content creators, with over a third of U.S. content creators reporting that they upload their own media and music online. Crucially, as the industry watches the dawn of the AI era, it is the musicians themselves who are leading the charge — embracing generative AI as an assistive creative tool to remix, edit and redefine the boundaries of modern music production.



BIGXTHAPLUG
CREDIT: DAVID BRENDAN HALL

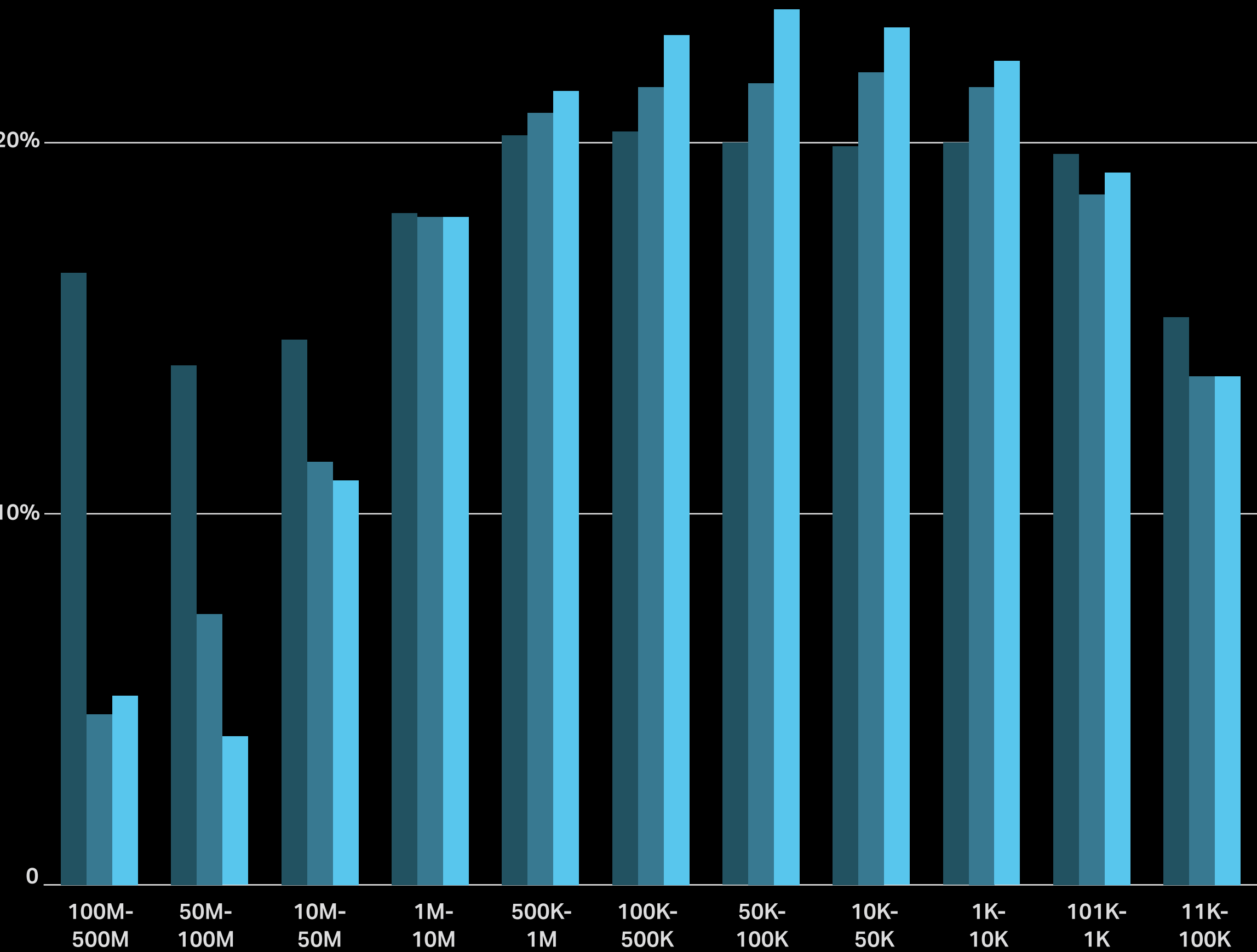
U.S. independent music presence builds through mid and lower tiers.

Of music that is eligible for U.S. market share, independent/non-major distributed tracks (ISRCs) have increased their presence throughout the mid- and lower-volume streaming tiers. These independent tracks either held steady or expanded their numbers at all tiers with 10M or fewer streams while growing at the most elite tier — 100M-500M.

INDEPENDENT SHARE OF ISRCs, PER TIER

U.S. On-Demand Audio streams, weeks 1-21, based on distributor market share

2024 2025 2026



INDEPENDENT SHARE OF TRACKS (ISRCs)

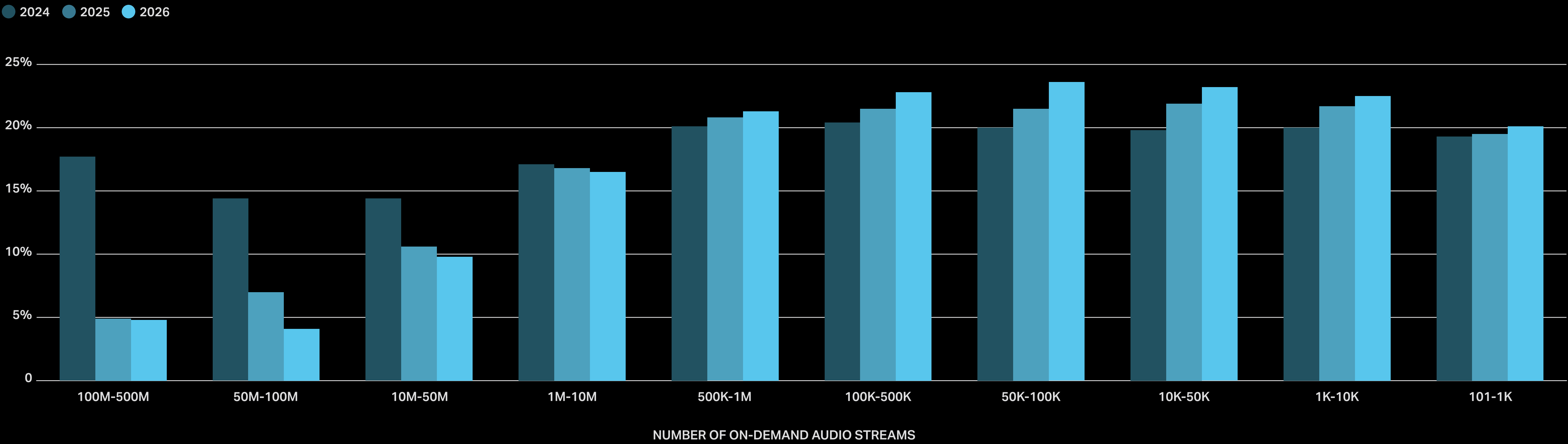
SOURCE: LUMINATE MUSIC CONSUMPTION DATA; INDEPENDENT INCLUDES ALL DISTRIBUTION OUTSIDE MAJOR LABELS OR THEIR OWNED ENTITIES, INCLUDING ADA, THE ORCHARD AND VIRGIN

Independent streaming share grows modestly.

While indie presence has grown in more than half of the tiers shown, growth in streaming share of these tiers has been more measured. Major record labels control of the top of the streaming funnel in 2026, but a new path for indie artists and tracks is taking shape. Non-major distribution shows clear year-over-year growth across mid-tier brackets and a steady, concentrated footprint of roughly 5% at the elite level (100M–500M streams). While major labels are successfully maintaining a fortress around blockbuster streaming hits, independent sectors are building a sustainable ecosystem away from reliance on singular mainstream superstars.

INDEPENDENT STREAMING SHARE, ACROSS TIERS

U.S. On-Demand Audio streams, weeks 1-21, based on distributor market share



SOURCE: LUMINATE MUSIC CONSUMPTION DATA; INDEPENDENT INCLUDES ALL DISTRIBUTION OUTSIDE MAJOR LABELS OR THEIR OWNED ENTITIES, INCLUDING ADA, THE ORCHARD AND VIRGIN; MORGAN WALLEN PRIMARY ARTIST CATALOG MOVED FROM INDEPENDENT TO MAJOR DISTRIBUTION IN 2024

AI music is taking center stage.

The global music industry is navigating complex policy and monetization questions around AI-generated and AI-assisted content. In November 2023, The Beatles' song “Now and Then” was one of the first high-profile cases of AI assistance when it was used to help separate John Lennon’s vocal from the original demo recording. Now an influx of tracks, including “Papaoutai (Afro Soul)” by Chill77, Unjaps and Mikeeysmind, are seeing significant activity. And while the top AI-generated track in the U.S. only ranks 4,304, the 19M U.S. On-Demand Audio streams generated by Breaking Rust’s “Livin’ on Borrowed Time” and 59% U.S. share of activity demonstrate there is potential for U.S. consumer demand.

TOP 5 AI-ASSISTED AND/OR GENERATED TRACKS, RANKED BY GLOBAL ON-DEMAND AUDIO STREAMS, WEEKS 1-24, 2026

Artist	Song Title	Release Date	Ex-U.S. ODA Streams	U.S. ODA Streams	Global Rank	U.S. Rank	Ex-U.S. Share	U.S. Share
Chill77, Unjaps, Mikeeysmind	“Papaoutai (Afro Soul)”	12/20/25	210.7M	17.6M	282	4,802	92.3%	7.7%
The Second Voice	“LET ME BE”	1/25/26	75.6M	10.1M	2,185	9,253	88.2%	11.8%
Tu Corrido Mx	“Entre tú y yo”	12/26/25	25.8M	7.3M	8,310	13,299	77.9%	22.1%
Ragal Ironbull	“VALHALLA CALLING”	4/3/26	26.0M	6.6M	8,479	14,914	79.8%	20.2%
Breaking Rust	“Livin’ on Borrowed Time”	10/14/25	13.4M	19.0M	8,558	4,304	41.3%	58.7%

SOURCE: LUMINATE MUSIC CONSUMPTION DATA; “AI ASSISTED” DEFINED AS HUMAN-LED AI USED AS A TOOL (E.G., STEM SEPARATION, MASTERING, ARRANGEMENT HELP, LYRIC DRAFTING, PRODUCTION ASSISTANCE); AI GENERATED (OR “FULLY AI-GENERATED”) IS DEFINED AS OUTPUT FROM PROMPTS INTO GENERATIVE MODELS WITH MINIMAL HUMAN DIRECTION



Musicians are increasingly open to using generative AI as a tool.

Musicians are embracing gen AI tools at a significantly higher rate than the general public, suggesting they view the technology with optimism rather than resistance. As musicians view these tools more positively than the general public, tech platforms are best served by establishing formal, ethical AI-creator toolkits that protect IP and foster technical innovation.

54%

of U.S. musicians show positive feelings and acceptance toward gen AI tools in music, compared with 35% of non-musicians.

18%

of U.S. musicians report using AI to edit or remix existing music, while only 6% of non-musicians use AI for editing or remixing.

SOURCE: LUMINATE ENTERTAINMENT 365, LUMINATE U.S. MUSIC 360, Q1 2026

U.S. CREATOR ACTIVITIES

Luminate defines a content creator as someone who creates any content with the intention of reaching a broader audience. The data presented here represents the percentage of the general population that turns out at least one type of content from the list provided here with the intention of reaching a broader audience.

Creator Activities	Percentage of U.S. Creators
Post on social media	70%
Post short video clips/stories online	45%
Post full-length videos online	35%
Upload music online (audio and/or video)	35%
Host a livestream	22%
Produce a podcast	21%

+52%

more likely to attend music festivals

+45%

more likely to be music superfans



39% of the U.S. general population consider themselves content creators.

The line between consumer and creator has blurred significantly in recent years, with more than a third (39%) of the U.S. general population now identifying themselves as content creators. These creators are highly active, with a notable 35% directly uploading music audio or video online. For the broader industry, this signals that marketing teams and rights holders must view the general public as active an promotional partner rather than just a target audience.

SOURCE: LUMINATE U.S. MUSIC 360, Q1 2026; COMPARISONS TO THE AVERAGE U.S. MUSIC LISTENER

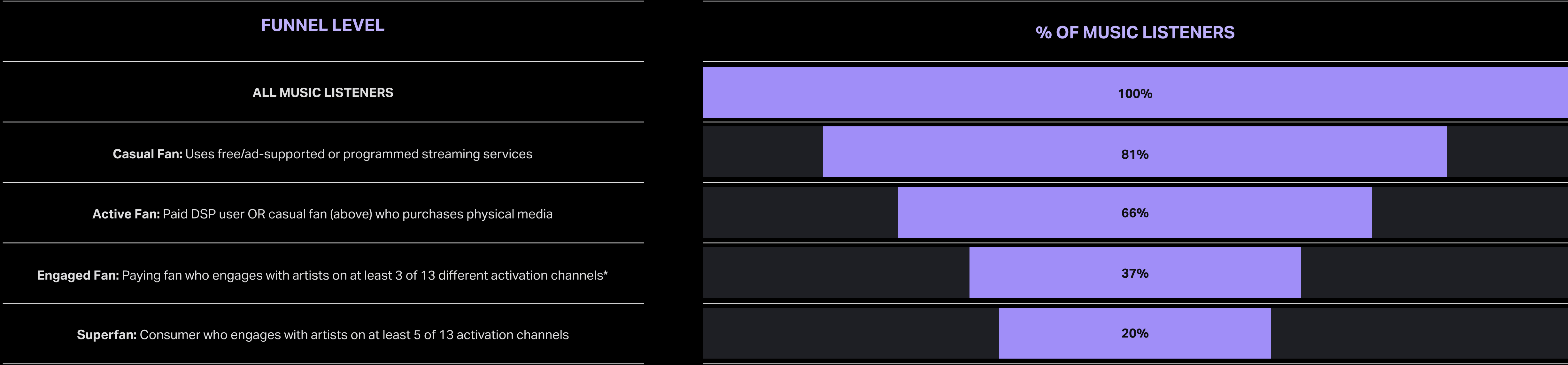
/ 01 MUSIC

PAID & FREE FANDOM

As macroeconomic pressures and inflation squeeze consumer wallets in 2026, the industry must look past basic streaming volume to understand the nuances of fandom segmentation. True superfandom has bifurcated into two distinct behavioral classes: purchase-based fans, who protect their favorite artists through financial support; and engagement-based fans, who put their time and social capital toward community building. Navigating this environment requires a deliberate strategy that respects fans’ financial constraints while maximizing their organic advocacy.

U.S. fan engagement is multilevel.

In Luminate’s most recent audience response data, 20% of U.S. music listeners are considered superfans, meaning they engage with artists and music in 5 or more ways. However, the levels of fandom vary, and understanding where specific fan groups fit into the Fan Engagement Funnel helps marketers tailor activations and devise strategies to move fans closer to superfan status.



SOURCE: LUMINATE U.S. MUSIC 360; *ACTIVATION CHANNELS DEFINED IN METHODOLOGY AT BACK OF REPORT



TAYLOR SWIFT
CREDIT: JOHN NACI ON

Superfan activities fall into purchase- and engagement-based categories.

Modern superfandom manifests through two distinct behaviors: financial investment and community immersion. Purchase-based fans are defined by tangible economic actions, with 73% seeing value in artist merchandise and 56% willing to travel out of town for live music. Meanwhile, engagement-based fans (seen on following page) drive the culture through social connection, where 54% use music to experience new perspectives and 45% use digital livestreams to feel closer to creators.

TOP 5 U.S. SUPERFAN PURCHASE ACTIVITIES

Scope of Defining Behaviors	Music Listeners
Values artist merchandise other than the music (e.g., T-shirt, hat)	73%
Willing to travel out of town to see an artist perform live	56%
Attends an in-person live music performance	53%
Buys artist merchandise (e.g., T-shirts, stickers) to financially support the artist	41%
Wishes there were more ways to financially support artists	35%

SOURCE: LUMINATE U.S. MUSIC 360, Q1 2026

TOP 5 U.S. SUPERFAN ENGAGEMENT ACTIVITIES

Scope of Defining Behaviors	Music Listeners
Listens to music to experience new cultures and perspectives	54%
Livestreams performances to feel more connected with a favorite artist	45%
Would like to connect with music artists on a more personal level (e.g., live chats)	40%
Talks about the artist with friends or family	39%
Listens to specific artists to participate in the community it provides	38%

SOURCE: LUMINATE U.S. MUSIC 360, Q1 2026



The financial split in superfandom warrants a unique engagement approach.

For industry strategists, the fandom behavior split means marketing can no longer rely purely on a consumer’s wallet. Value must be captured by balancing high-margin physical products for the transactional fan with rich, interactive community spaces for the socially active fan.

Approximately 1 in 10 U.S. superfans engages in both purchase- and engagement-based activities.

While 22% of all music listeners qualify as purchase-based superfans and 17% qualify as engagement-based superfans, a highly prized core of 11% represents the ultimate overlap: individuals who are both financially and socially invested. Identifying and targeting this specific overlap allows rights holders to optimize their conversion campaigns, ensuring that promotional efforts hit the fans most likely to simultaneously stream, purchase and champion.

MUSIC SUPERFAN VENN DIAGRAM

Among music listeners

22%

TOTAL purchase-based superfans

11%

Purchase-based
superfans ONLY

11%

Both purchase- and
engagement-based
superfans

6%

Engagement-based
superfans ONLY

17%

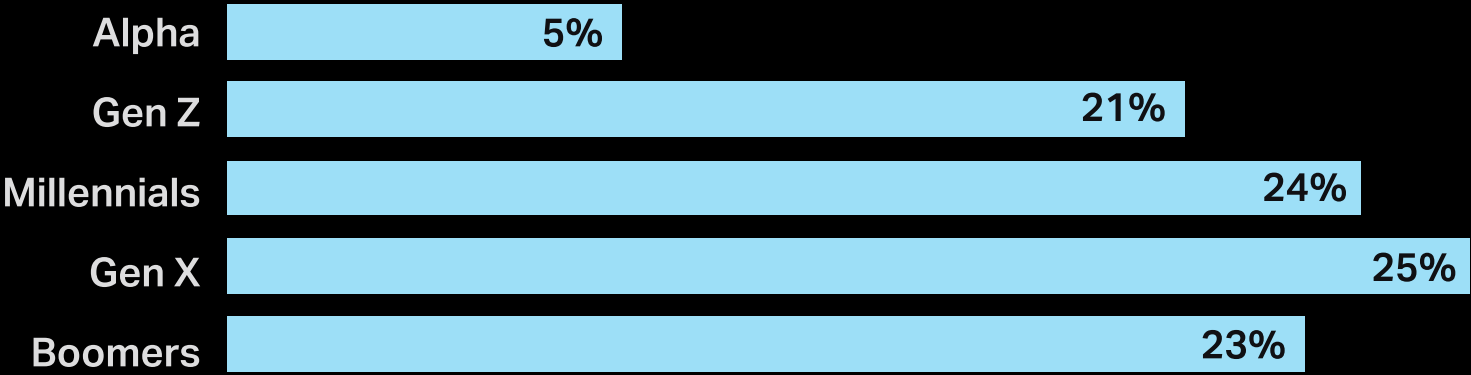
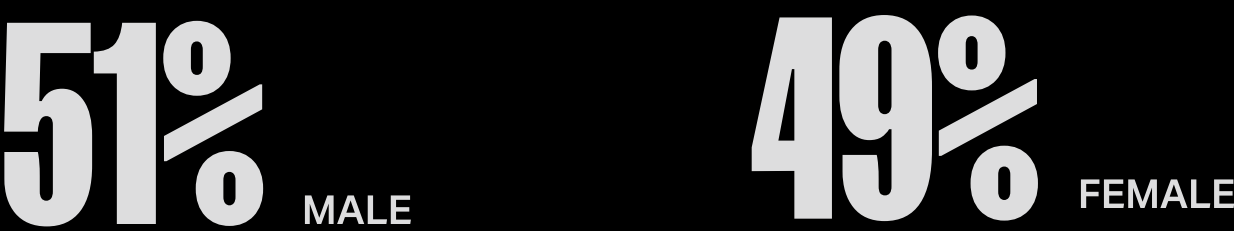
TOTAL engagement-based superfans

SOURCE: LUMINATE U.S. MUSIC 360, Q1 2026

Youth culture drives online engagement, while premium superfandom is anchored to a high-income demographic.

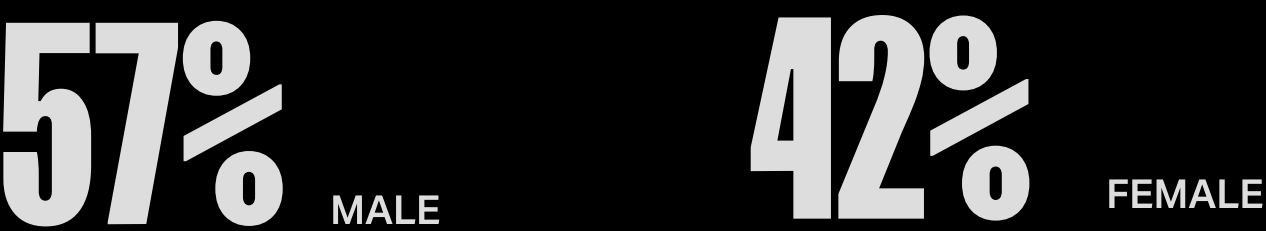
The demographic profiles of superfans display distinct age and income disparities compared with the general music-listening public. While Gen Z and Millennials make up half of the general audience, they overindex heavily in engagement-based superfandom at a combined 63%. Financially, both superfan segments demonstrate significantly higher economic resilience, with 42% of purchase-based and 39% of engagement-based fans reporting a household income over \$100K, versus just 26% of total music listeners. These profiles reveal that while youth culture drives online engagement, the financial backbone of premium fandom is anchored to an affluent, high-income demographic. This disparity requires labels to design tiered monetization strategies that offer free or low-cost digital interaction for younger segments while reserving premium, high-ticket D2C items for higher-income fans.

TOTAL MUSIC LISTENERS



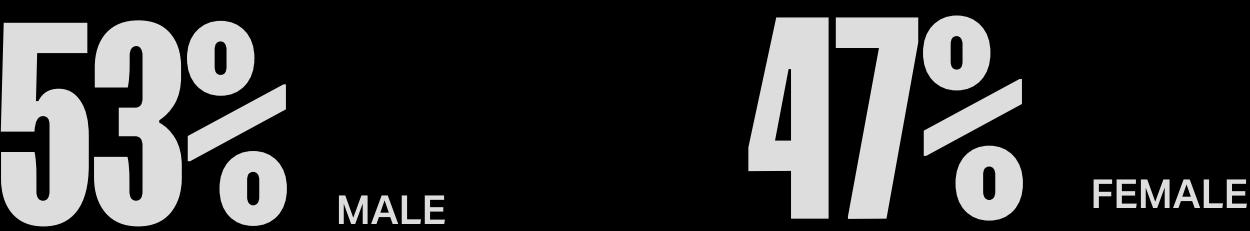
26% HOUSEHOLD INCOME OVER \$100K

PURCHASE-BASED SUPERFANS



42% HOUSEHOLD INCOME OVER \$100K

ENGAGEMENT-BASED SUPERFANS



39% HOUSEHOLD INCOME OVER \$100K

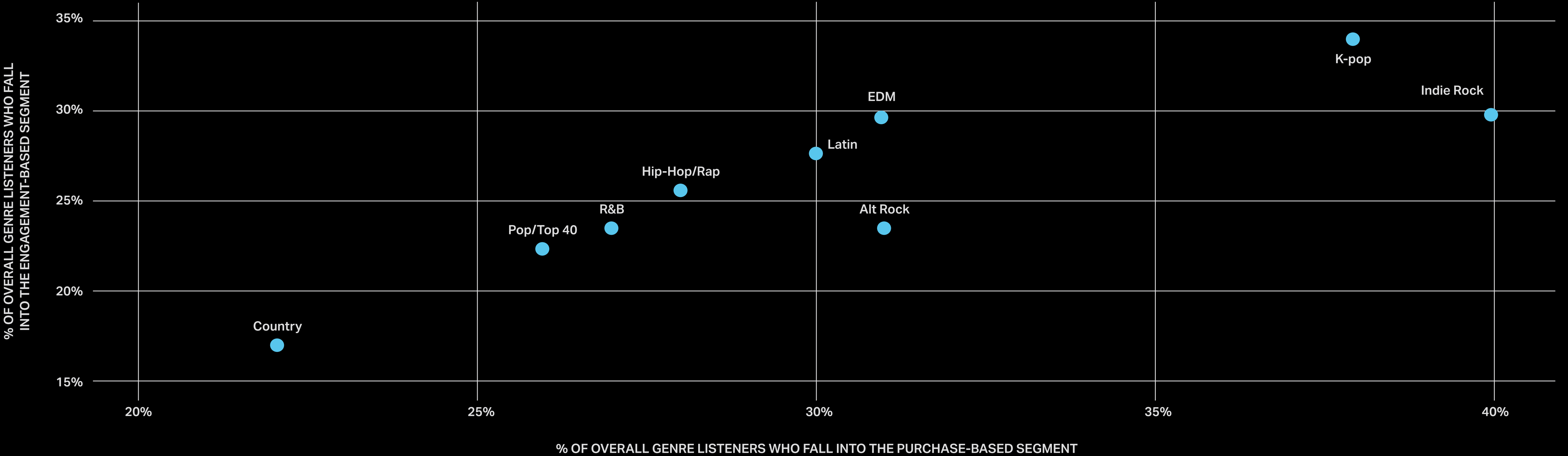
SOURCE: LUMINATE U.S. MUSIC 360, Q1 2026

K-pop and indie rock lead the purchase x engagement matrix.

A matrix cross-referencing genre fandom with the likelihood of fans to broadcast their music habits reveals that K-pop leads the entire industry, boasting both the highest percentage of overall segment listeners and a peerless propensity for peer-to-peer amplification. Indie Rock and EDM also display remarkably dense pockets of high-engagement and high-purchase superfans. Conversely, Country and Pop sit in the lower-left quadrant, indicating a more lean-back, consumption-heavy listener base. This matrix demonstrates how niche and highly community-driven genres such as K-pop, EDM and Indie Rock provide a self-sustaining marketing engine through fan advocacy, giving these genres a disproportionate cultural and commercial footprint relative to their baseline streaming volumes.

U.S. GENRE & SUPERFANDOM

Based on the average fan in these genres



SOURCE: LUMINATE U.S. MUSIC 360, Q1 2026



KATSEYE

CREDIT: GILBERT FLORES

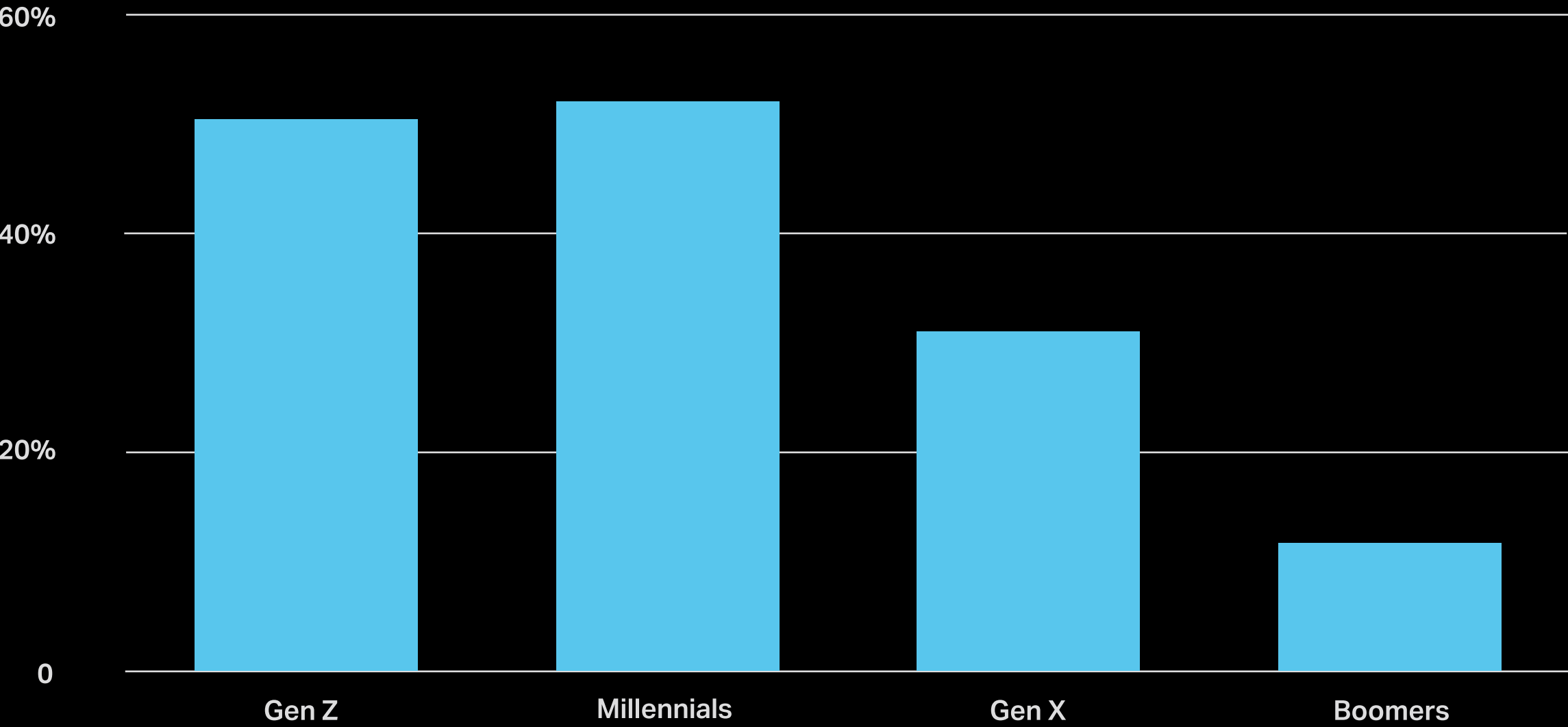
The 2026 CD sales resurgence comes with a fascinating twist.

In a much-discussed physical-media pivot, CD sales surged 16% to 16.3 million units in the first half of 2026, vastly outpacing vinyl's modest 2.4% growth. Driven by collection building, price accessibility, massive albums such as BTS' *ARIRANG* and a strong K-pop release schedule, this revival belies an unexpected development: Approximately half of Gen Z and Millennial CD buyers do not actually own a CD player.

After removing BTS and other K-pop sales, U.S. CD sales would still be +6.7% through the first half of 2026, suggesting that the CD has been recontextualized from a functional audio format into an affordable collectible. This behavior underscores that for younger generations, the act of buying physical music is as much about aesthetic ownership and direct financial support for the artist as it is listening to the music on the product itself.

APPROXIMATELY HALF OF GEN Z AND MILLENNIALS WHO HAVE PURCHASED A CD DO NOT OWN A CD PLAYER

% who bought a CD but DO NOT own a CD player



TOP U.S. CD ALBUM SALES, WEEKS 1-26, 2026

Artist	Title	U.S. CD Sales
BTS	ARIRANG	567.0K
ENHYPEN	THE SIN : VANISH	286.4K
ATEEZ	GOLDEN HOUR: PART.4	263.0K

SOURCE: U.S. MUSIC 360, Q1 2026, LUMINATE MUSIC CONSUMPTION DATA

Go inside Luminate's *Live Music 2026* report.

Some industry reports cite “blue dot fever” as a reason for recent high-profile tour cancellations, but what are the main barriers to ticket purchase for fans?

POP LISTENERS

- 1. Date of event
- 2. Cost of ticket
- 3. Cost of travel to event

HIP-HOP LISTENERS

- 1. Date of event
- 2. Cost of travel to event
- 3. Lineup of event

K-POP LISTENERS

- 1. Date of event
- 2. Size of event/number of attendees
- 3. Personal safety concerns (e.g., crowd control, lack of safe space)

LATIN LISTENERS

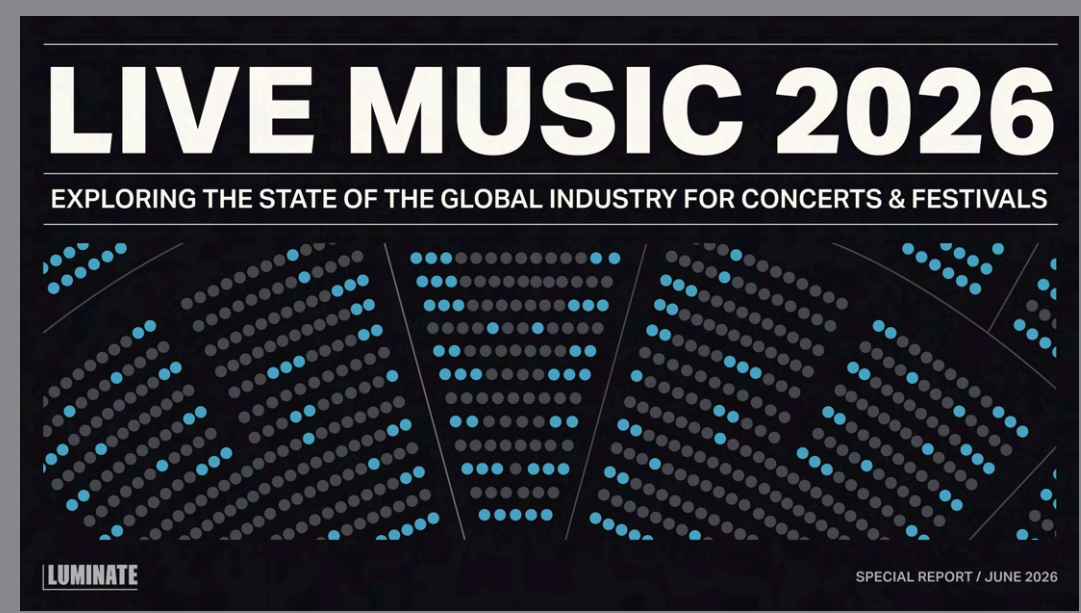
- 1. The event is not held at an accessible venue
- 2. The event ends too late at night
- 3. Date of event

ROCK LISTENERS

- 1. Cost of ticket
- 2. Location of event
- 3. The event is not held at an accessible venue

COUNTRY LISTENERS

- 1. Cost of ticket
- 2. Cost of travel to event
- 3. Location of event



FOR MORE ON THE STATE OF CONCERTS AND FESTIVALS, READ LUMINATE’S JUNE 2026 REPORT [HERE](#).

SOURCE: LUMINATE U.S. MUSIC 360, Q1 2026

Go inside Luminate's *Retro Revival* report.

60%

of Gen Z consumers (ages 13-24) now report they listen to music from the 1990s or earlier the most, skyrocketing from just 18% in 2021.

54%

of Gen X and 49% of Gen Z consumers specifically cite nostalgia as an important motivating factor when deciding to purchase vinyl. Additionally, 55% of Gen X buyers and 41% of Millennial buyers say nostalgia directly influences their CD purchases.



FOR MORE ON THE POWER AND IMPACT OF NOSTALGIA, READ LUMINATE'S MAY 2026 REPORT [HERE](#).



SOURCE: LUMINATE U.S. MUSIC 360, Q1 2026

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FILM & TV

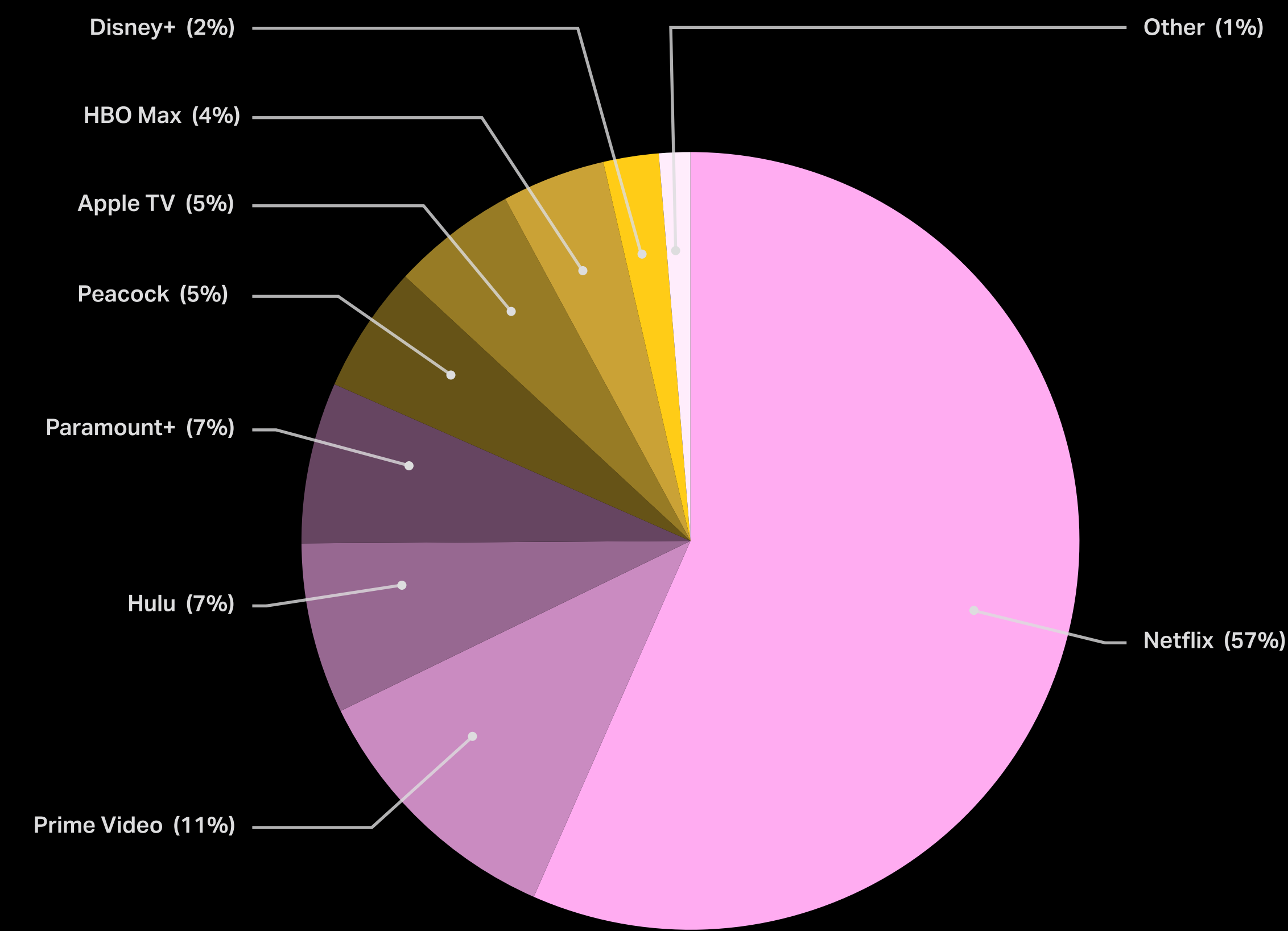


/ 02 **FILM & TV**

STREAMING ENGAGEMENT

Even as U.S. consumers continue to stream massive amounts of SVOD original content, library titles are what drive sustained viewing time for the biggest services, with even newer linear TV titles showing strength. Luminate Streaming Viewership (M) data illuminates the key trends shaping SVOD engagement in 2026.

SHARE OF U.S. STREAMING ORIGINAL VIEWING TIME, H1 2026



SOURCE: LUMINATE STREAMING VIEWERSHIP (M); NOTE: "OTHER" INCLUDES AMC+, BRITBOX, DISCOVERY+, TUBI; DATA SPANS JAN 2-JUL 2, 2026



HIS & HERS
CREDIT: ELI JOSHUA ADE/NETFLIX

Rivals’ hits are challenging Netflix’s market share.

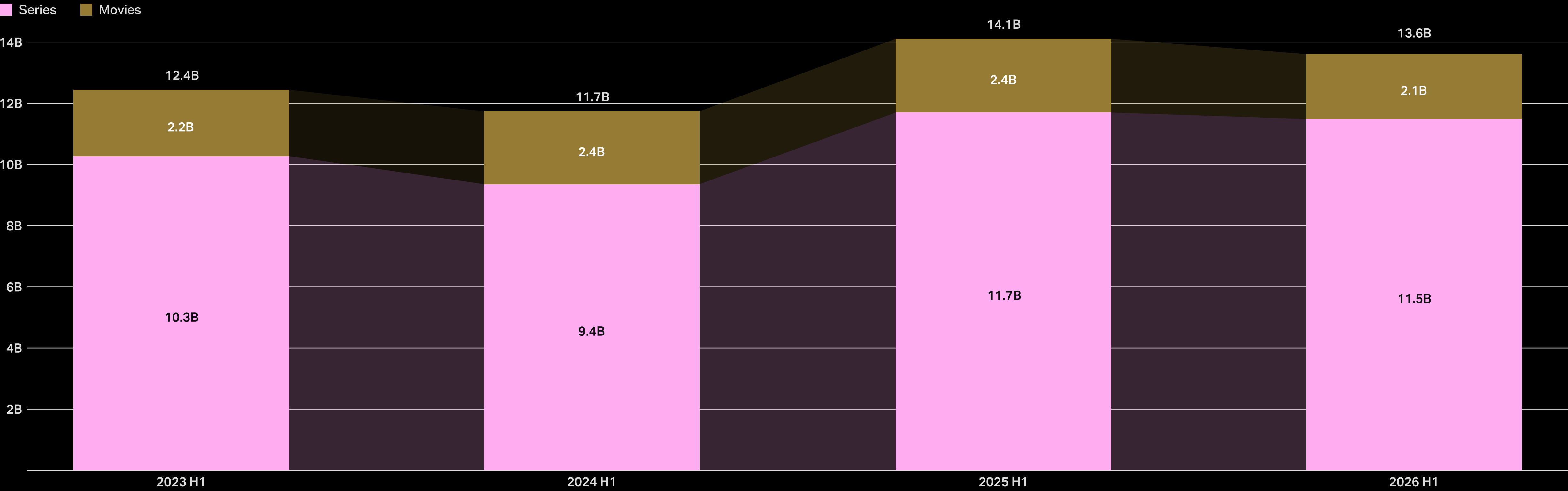
Netflix still accounts for well over 50% of U.S. original content viewing time among the major SVODs (overall for H1 and in any given week). However, its market share is noticeably down from H1 2025, continuing a recent downward trend as its rivals launch more hit shows. HBO Max and Amazon’s Prime Video captured the largest year-over-year increases in share; the latter did so without a major breakout hit in the first half of 2026, suggesting user growth and/or wider viewership across a broad range of titles.

Viewership for original content is still high despite a slight YoY dip.

U.S. original content streaming time year to date remains elevated from past years and nearly on par with 2025 despite a modest decline (possibly due to a stronger H1 theatrical film slate in 2026). Streaming usage broadly continues to climb in the U.S., and the growing number of megahits on various platforms will likely keep original content viewership elevated for the foreseeable future.

U.S. ORIGINAL CONTENT HOURS STREAMED

On major SVOD/AVOD platforms



SOURCE: LUMINATE STREAMING VIEWERSHIP (M); FIGURES MAY NOT SUM TO TOTALS DUE TO ROUNDING

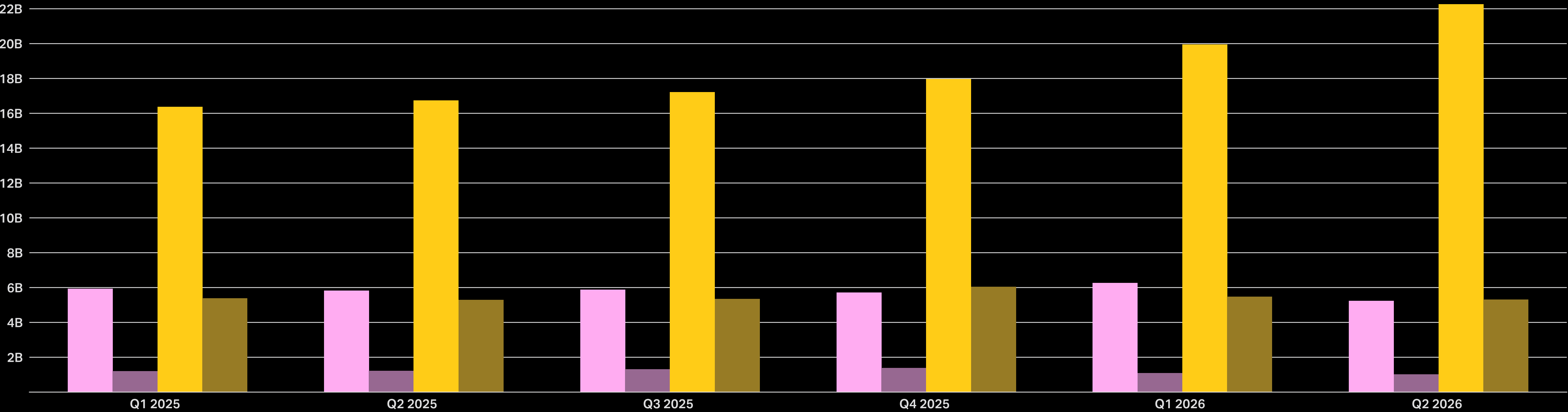
Audiences stream library films and TV far more than originals.

Library content consumption dwarfs that of original titles on streaming platforms, driven in part by sheer volume (per Luminate estimates, nearly 19,000 library titles are available on major services in the U.S., versus just 7,000 originals) but also by audience demand. Not only do older hits such as *The Big Bang Theory* and *Grey’s Anatomy* reliably draw substantial viewing time, but new broadcast network series have shown surprising strength on streaming compared with recent original hits.

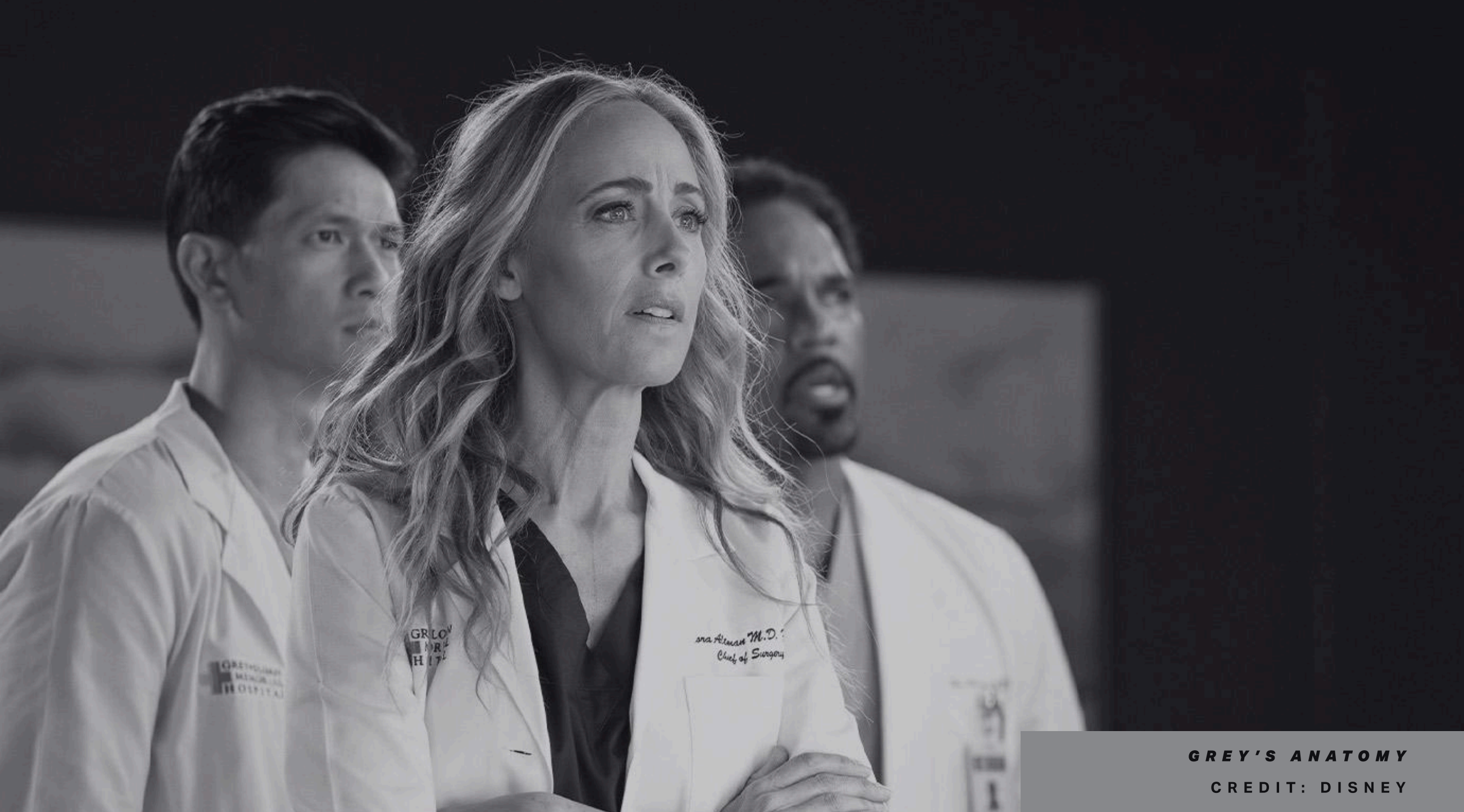
U.S. FILM & TV HOURS STREAMED

On major SVOD & AVOD platforms

Original TV Original film Library TV Library film



SOURCE: LUMINATE STREAMING VIEWERSHIP (M)



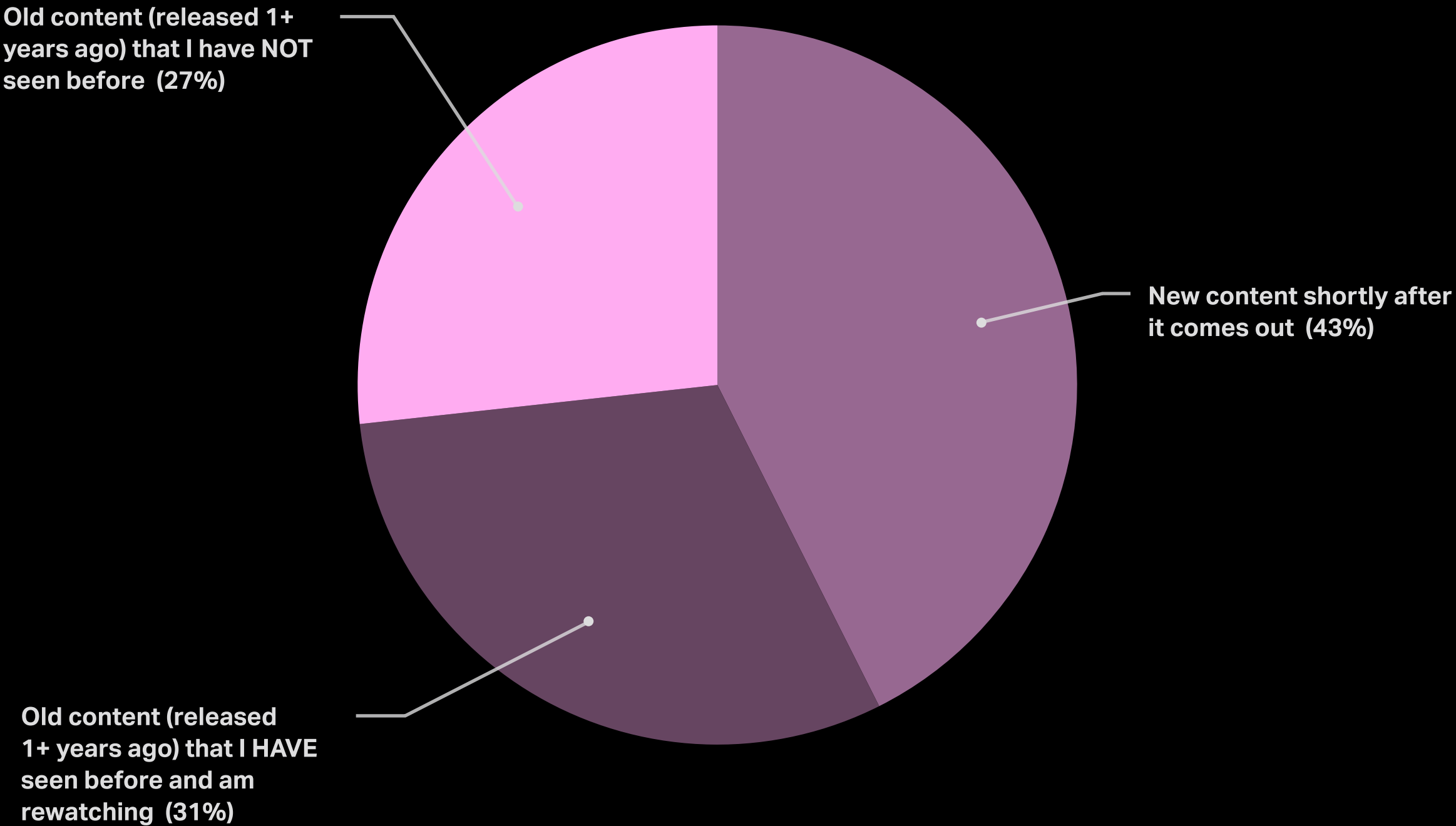
GREY'S ANATOMY
CREDIT: DISNEY

TV viewers say new titles get just over 40% of their time.

Television watchers surveyed by Luminate estimate they spend nearly 60% of their time watching or rewatching content more than one year old, with the remainder spent on “new content shortly after it comes out.” The impact that reduced post-peak TV output may have had on these viewing habits is not entirely clear; however, it’s more likely that viewing habits from cable TV, which was heavily saturated with syndicated reruns, have carried over to streaming.

OLD VS. NEW CONTENT VIEWING TIME

Survey Q: When watching at home, what percentage of that time do you usually spend watching the following types of TV shows?



SOURCE: LUMINATE ENTERTAINMENT 365; BASE: U.S. TV VIEWERS

Linear hits give “ParaMax” the chance to rival Netflix.

As the proposed Paramount Skydance-Warner Bros. Discovery merger inches closer to reality, it’s worth considering what this pair-up would mean for the content landscape. A major motivation behind the deal is to create a combined SVOD service that can truly compete with Netflix, which may be possible thanks to the two companies’ popular linear network titles. When factoring in streaming viewership for 2025 series from flagship channels such as CBS, HBO and HGTV on top of SVOD originals, a hypothetical “ParaMax” platform captured 20% of total U.S. hours streamed for such content last year, a solid second place behind Netflix’s 40%. This highlights a rare competitive advantage legacy media companies including Paramount and WBD hold over Netflix: the ability to generate robust viewing time from economically efficient linear titles, which typically cost far less to produce than streaming hits such as *Stranger Things*.

2025 SHARE OF U.S. STREAMING VIEWING

For platform originals and parent linear network originals

PLATFORM	HOURS STREAMED	MARKET SHARE
Netflix	17.9B	40%
Paramount+ & HBO Max	9.1B	20%
Hulu/Disney+	7.6B	17%
Paramount+	6.3B	14%
Peacock	6B	13%
Prime Video	3B	7%
HBO Max	2.8B	6%
Apple TV	1.4B	3%

SOURCE: LUMINATE FILM & TV, LUMINATE STREAMING VIEWERSHIP (M); “LINEAR NETWORK ORIGINALS” DEFINED AS 2025 LINEAR TITLES AVAILABLE SAME OR NEXT DAY ON SVOD

Podcasts on Netflix are off to a slow start on TVs.

Available data indicates the most popular podcast on Netflix is the daily talk show *The Breakfast Club*, which averaged 4 million weekly minutes streamed between its January SVOD debut and the end of May, when it transitioned to a live format. While this excludes mobile phone streaming, where a good deal of podcast consumption occurs, Netflix’s push into podcasts was widely seen as a challenge to YouTube and its growing dominance of big-screen viewing time. With sluggish viewing on TVs so far (a rough estimate would place *The Breakfast Club*’s daily Netflix audience at less than 2,000), it seems this attempt is meeting a somewhat muted reception.

THE BREAKFAST CLUB PODCAST ON NETFLIX, H1 2026

Weekly minutes streamed



SOURCE: LUMINATE STREAMING VIEWERSHIP (M);DATA SPANS JAN 30-MAY 28

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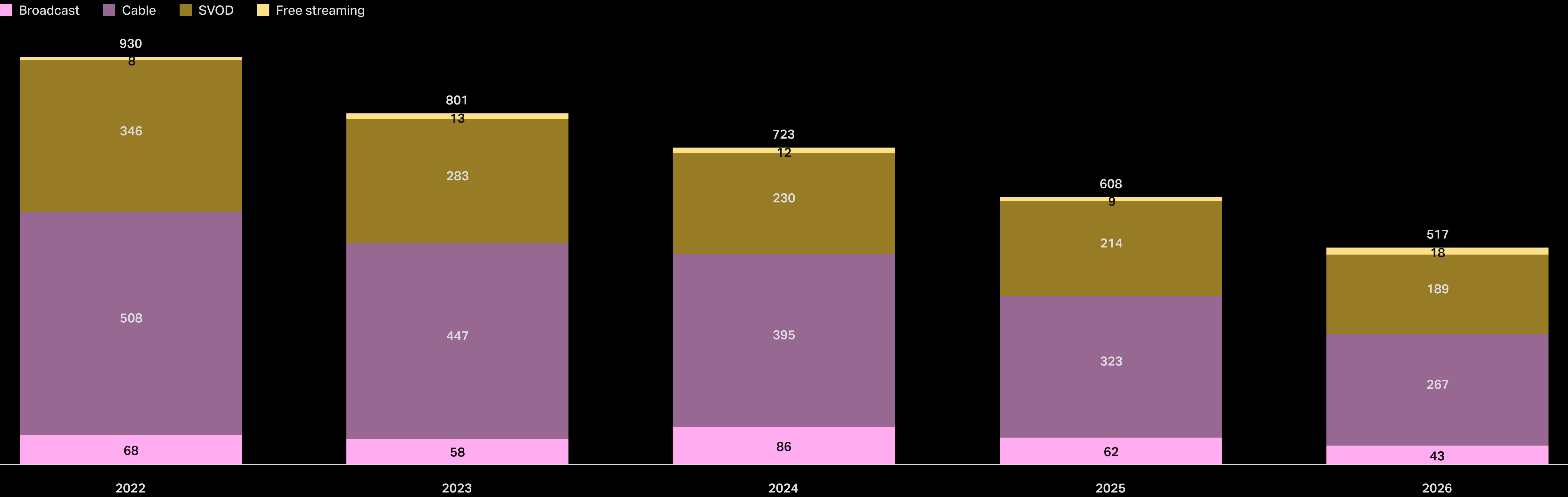
TV TRENDS

While *The Pitt* easily topped the charts as H1 2026’s most-watched streaming original series, a deeper dive into the data reveals a strong challenge from a surprising source: broadcast networks, which provided some of the year’s biggest streaming hits thus far. As U.S. TV premieres continue to sag, here’s a close look at what’s working among platforms’ much-reduced slates.

U.S. series output fell again YoY, continuing the annual post-peak TV trend.

U.S.-produced TV premieres in H1 fell 15% year over year, continuing the post-2022 trend of a roughly 10%-15% annual decline. Cable originals continue to erode rapidly, while broadcast networks also saw a surprisingly steep drop (though variable premiere dates for returning series play a role in this). SVOD series, meanwhile, posted another double-digit decline (12%), larger than 2025’s but smaller than that of previous years. On the whole, the post-peak TV contraction still has yet to show any signs of a reversal or even a significant slowdown.

U.S.-PRODUCED TV PREMIERES H1 2022-26, BY PLATFORM



SOURCE: LUMINATE FILM & TV

U.S. MOST-WATCHED STREAMING ORIGINAL SERIES, H1 2026

By minutes streamed

TITLE	PLATFORM	MINUTES STREAMED
<i>The Pitt</i>	HBO Max	19.4B
<i>The Lincoln Lawyer</i>	Netflix	16.9B
<i>Bridgerton</i>	Netflix	14B
<i>Landman</i>	Paramount+	13.1B
<i>Stranger Things</i>	Netflix	12B
<i>Love Island USA</i>	Peacock	11.8B
<i>The Night Agent</i>	Netflix	9.3B
<i>Virgin River</i>	Netflix	9.1B
<i>His & Hers</i>	Netflix	8.8B
<i>The Traitors</i>	Peacock	8.6B

SOURCE: LUMINATE STREAMING VIEWERSHIP (M); NOTE: DATA SPANS JAN 2-JUL 2, 2026



THE PITT

CREDIT: WARRICK PAGE/MAX

The Pitt topped all streaming originals in H1 2026.

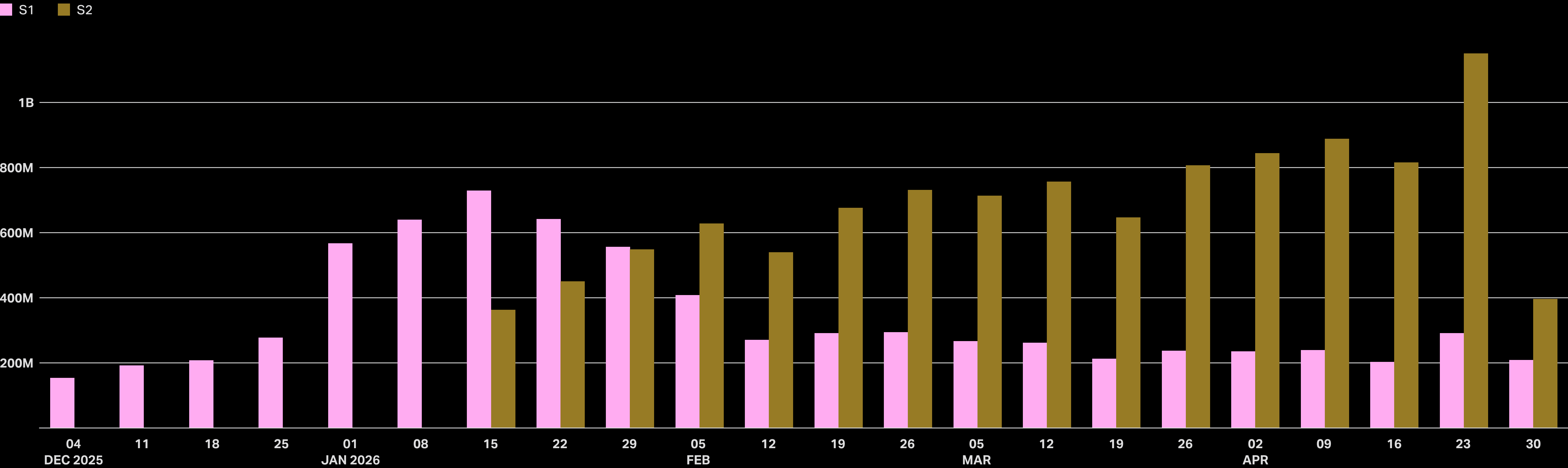
HBO Max’s *The Pitt* cemented itself as a streaming powerhouse with its second season, eclipsing all SVOD originals by a healthy margin in the first half of this year. Meanwhile, despite releasing most of their new episodes in 2025, fellow blockbusters *Landman* and *Stranger Things* also outranked most 2026 premieres. Netflix lost out on the top spot but once again claimed more than half of the top 10 most-streamed originals, defying skeptics as several of its biggest hits begin to wind down.

Sustained viewership for *The Pitt* is what truly fuels the show’s success.

The Pitt’s standout performance on HBO Max goes beyond its viewership upon release; the true strength of the series lies in its consistently strong engagement over time. After premiering in January 2025, the debut season did not dip below 100 million weekly minutes streamed until June, then saw a massive viewership surge in December as the season 2 premiere approached. The series thus achieved the most coveted success metric for a streaming hit: a new season fueling renewed engagement for previous entries.

THE PITT U.S. MINUTES STREAMED

December 2025-April 2026, for week ending ...



SOURCE: LUMINATE STREAMING VIEWERSHIP (M)

New broadcast series show surprising streaming strength.

Newly available data from Luminate Streaming Viewership (M) shows that current broadcast network originals do surprisingly well on SVOD platforms. Viewership for *The Pitt*’s sophomore season was eclipsed by two CBS series in H1, *Marshals* and *Tracker*. For the former, at least, this is not a case of a broadcast series boasting the advantage of an inflated runtime; *Marshals* S1 runs roughly two and a half hours shorter than *The Pitt* S2. Meanwhile, the latest seasons of ABC’s *The Rookie* and *Will Trent* both managed to surpass viewing time for Netflix’s *His & Hers*, one of 2026’s top streaming original hits. The runtime caveat does apply here, as both ABC series had 18 episodes versus *His & Hers*’ six. But the fact remains that, for all the noise about the death of linear TV, new broadcast series are still generating significant engagement.

U.S. MOST-STREAMED TV SEASONS, H1 2026

By minutes streamed

Broadcast originals Streaming originals

TITLE	ORIGINAL NETWORK	STREAMING PLATFORM	MINUTES STREAMED
<i>Marshals</i> S1	CBS	Paramount+	16B
<i>Tracker</i> S3	CBS	Paramount+	12.9B
<i>The Pitt</i> S2	-	HBO Max	12.5B
<i>The Lincoln Lawyer</i> S4	-	Netflix	10.8B
<i>Love Island USA</i> S8	-	Peacock	10.4B
<i>The Rookie</i> S8	ABC	Hulu/Disney+	10.3B
<i>Bridgerton</i> S4	-	Netflix	9.7B
<i>Landman</i> S2	-	Paramount+	9.3B
<i>Will Trent</i> S4	ABC	Hulu/Disney+	9.3B
<i>Sheriff Country</i> S1	CBS	Paramount+	9B

SOURCE: LUMINATE STREAMING VIEWERSHIP (M); NOTE: DATA SPANS JAN 2–JUL 2, 2026

/ 02 FILM & TV

FILM FOCUS

The two biggest stories for film in 2026 so far go hand in hand: Streaming original movies saw a resurgence after years of losing out to theatrical titles on SVOD, while audiences showed a renewed interest in consuming films in theaters, driving the domestic box office to post-pandemic heights. Luminate Insights data digs further into this phenomenon, illustrating how younger consumers are fueling the return to out-of-home moviegoing.



The Crash and *The Rip* led H1 streaming films as SVOD originals resurged.

After years of taking a backseat to theatrical titles on SVOD platforms, streaming original films have come roaring back, accounting for seven of the top 10 most-streamed titles in H1 2026. All but one of those came from Netflix, which benefited from the breakout success of true-crime documentary *The Crash* as well as the reteaming of Matt Damon and Ben Affleck in *The Rip*. However, Disney’s *Zootopia 2* has a strong chance of rising to No. 1 by year’s end, as family films often do on the back of repeat viewing by young children.

U.S. MOST-STREAMED FILMS, H1 2026

By estimated views

Streaming original film Theatrical film

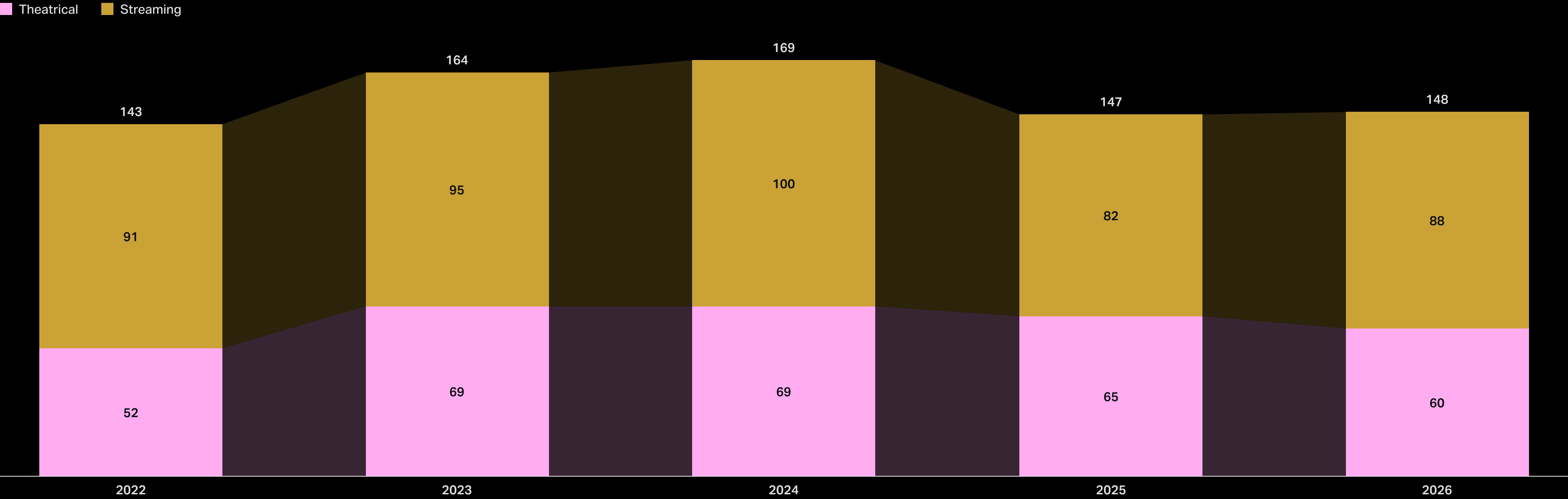
TITLE	PLATFORM	VIEWS
<i>The Crash</i>	Netflix	39.6M
<i>The Rip</i>	Netflix	39.5M
<i>Apex</i>	Netflix	37.3M
<i>Zootopia 2</i>	Disney+	36.4M
<i>War Machine</i>	Netflix	32.6M
<i>The Wrecking Crew</i>	Prime Video	27M
<i>People We Meet on Vacation</i>	Netflix	21.4M
<i>Toy Story</i>	Disney+	21.3M
<i>The Devil Wears Prada</i>	Hulu/HBO Max	20.3M
<i>Remarkably Bright Creatures</i>	Netflix	20M

SOURCE: LUMINATE STREAMING VIEWERSHIP (M); DATA AS OF MAY 26; “VIEWS” DEFINED AS MINUTES STREAMED DIVIDED BY RUNTIME

Free streaming is offsetting shrinking SVOD original film slates.

Theatrical film slates tend to be backloaded with mid-to-late-summer blockbusters, holiday season tentpoles and awards bait, making H1 volume an imprecise bellwether for the health of the industry. Major theatrical releases actually hit a new post-pandemic high in 2025, and time will tell whether 2026’s theatrical output surpasses this. As for straight-to-streaming films, shrinking SVOD releases are being offset by growing slates at Tubi and other free streamers. A true breakout moment for an original free streaming film is likely not far off.

U.S.-PRODUCED MAJOR FILM RELEASES, H1 2022-26



SOURCE: LUMINATE FILM & TV; NOTE: “STREAMING” INCLUDES MAJOR U.S.-BASED SVOD AND FREE STREAMING PLATFORMS; “THEATRICAL” INCLUDES MAJOR AND MINI-MAJOR U.S.-BASED STUDIOS (THE BIG FIVE, A24, AMAZON MGM, APPLE, LIONSGATE, NEON, UNITED ARTISTS)

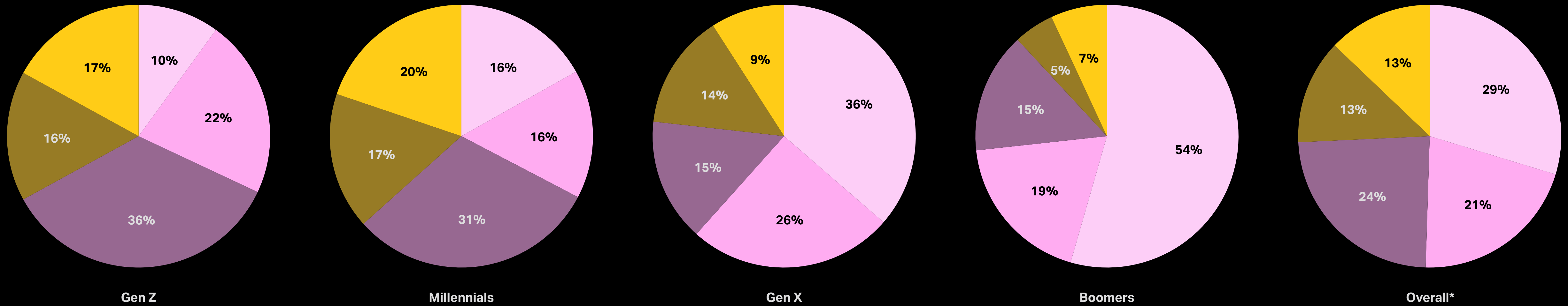
Younger generations fuel theatrical moviegoing with frequent attendance.

With theatrical moviegoing mounting a comeback this year, it’s become clearer than ever that younger generations are driving box office success in the post-COVID market. Per Luminate’s H1 Entertainment 365 survey data, nearly 70% of both Gen Z and Millennial movie watchers saw two or more films in theaters within three months of the survey, with about a fifth of each cohort seeing four or more. By contrast, more than half of Boomers and 36% of Gen X who watch movies reported not going to a theater at all.

U.S. THEATRICAL MOVIEGOING FREQUENCY

Survey Q: About how many films have you seen in a theater in the past 3 months?

None One Two Three Four or more



SOURCE: LUMINATE ENTERTAINMENT 365; *OVERALL FIGURES REPRESENT COMBINED NET OF THESE FOUR GENERATIONS; BASE: U.S. MOVIE WATCHERS

DOMESTIC BOX OFFICE VS. U.S. STREAMING VIEWS

For first 28 days on SVOD

TITLE	DOMESTIC B.O.	WINDOW	VIEWS
<i>One Battle After Another</i>	\$72.9M	84 days	10.6M
<i>Marty Supreme</i>	\$96.0M	120 days	4.1M
<i>Red One</i>	\$97.0M	27 days	23M
<i>Weapons</i>	\$151.6M	77 days	8.3M
<i>Sinners</i>	\$280.0M	77 days	11.4M
<i>Jurassic World Rebirth</i>	\$339.6M	120 days	15.7M
<i>A Minecraft Movie</i>	\$424.1M	77 days	11.5M
<i>Zootopia 2</i>	\$428.1M	105 days	20.6M

SOURCE: LUMINATE STREAMING VIEWERSHIP (M), BOX OFFICE MOJO; NOTE: "VIEWS"
DEFINED AS MINUTES STREAMED DIVIDED BY RUNTIME; DATA FIELDIED MAY 2026

Long theatrical windows don’t dent streaming views.

After COVID and the streaming wars drove an industrywide shrinking of theatrical-exclusive windows, the pendulum has swung back. Companies including Universal and Sony have affirmed their commitment to longer windows, while most major studio films now take 75 to 120 days to arrive on SVOD after their theatrical debuts.

It’s not hard to see why: Long theatrical windows do not seem to negatively impact streaming viewership, but short windows can cut into valuable box office revenues. For instance, Amazon’s *Red One*, which arrived on Prime Video less than 30 days after its theatrical release, failed to clear \$100M domestically despite boasting stars Dwayne Johnson and Chris Evans.

Indeed, when a lengthy window is granted, domestic box office and streaming views show a strong (though not perfect) correlation, with a higher B.O. total generally predicting more views in a title’s first month on SVOD.



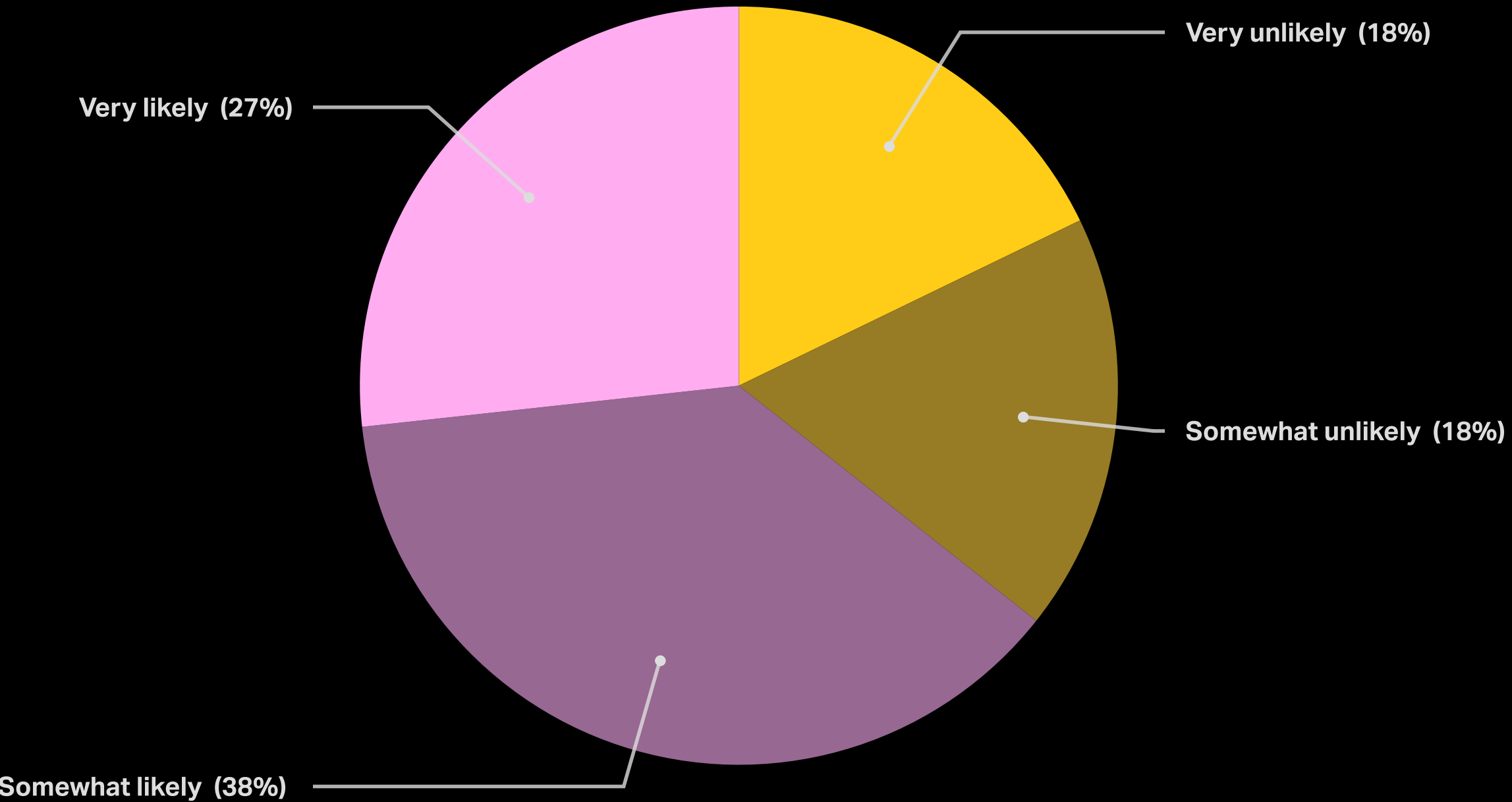
WUTHERING HEIGHTS
CREDIT: WARNER BROS.

Movie streamers value theaters for films they want to see.

When it comes to premium VOD, theatrical windows are still reduced from the pre-pandemic 90-day mandate, with 45 days the new standard for successful studio titles. However, even with at-home availability, it appears that consumers who stream movies still value a theatrical experience for films they find compelling: Among U.S. consumers who stream movies, just 36% said they would be unlikely to see a film they planned to view in theaters if they knew it would be available to stream 45 days after its theatrical release.

THEATRICAL WINDOWS’ IMPACT

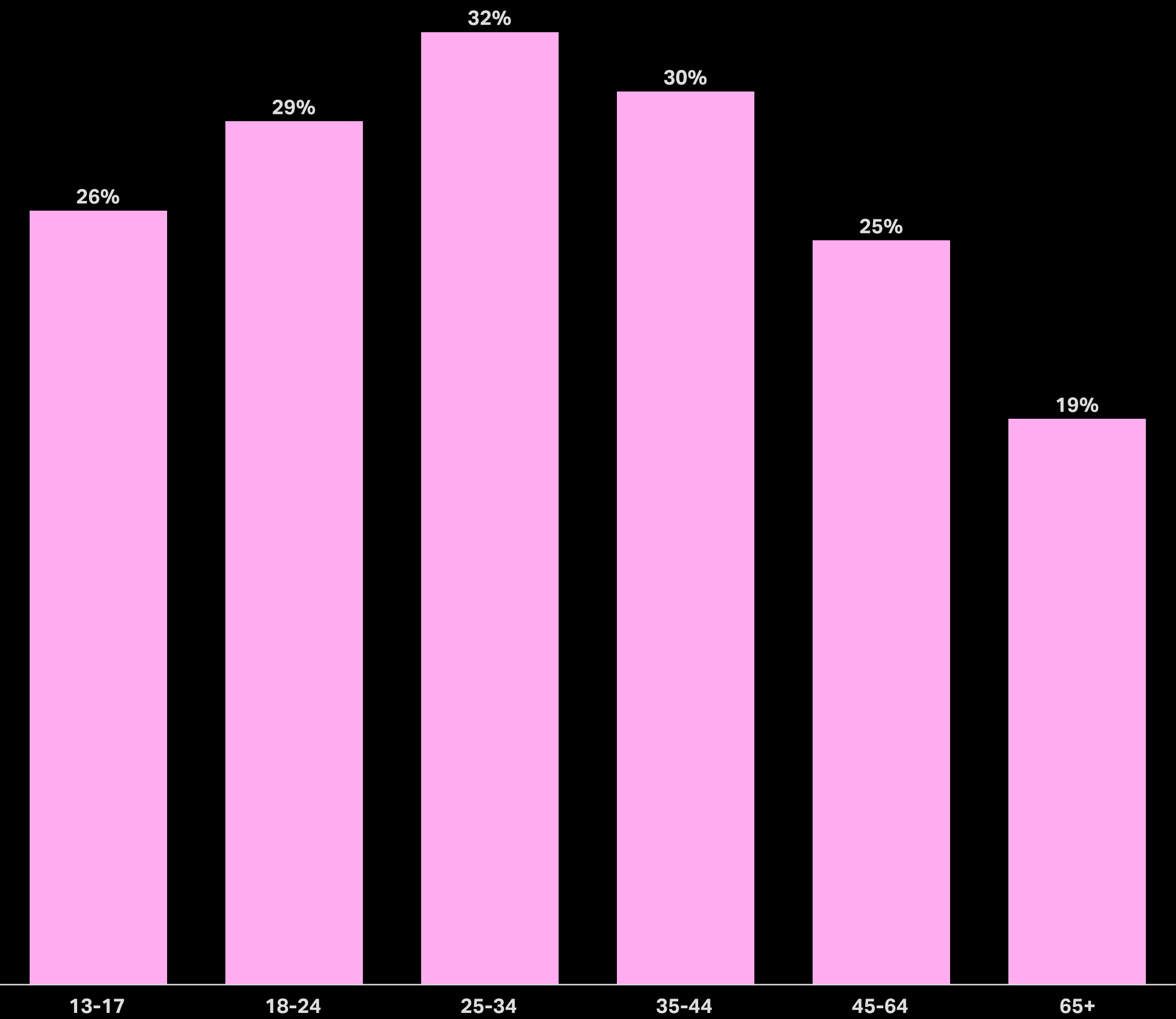
Survey Q: Thinking about a newly released movie you plan to see, how likely are you to watch it in theaters if it will be available to stream 45 days after its theatrical release?



SOURCE: LUMINATE ENTERTAINMENT 365; BASE: U.S. MOVIE STREAMERS

DEMAND FOR ORIGINAL MOVIES, BY AGE

Share of movie watchers agreeing with the statement, “I wish there were more original movies to see in theaters (e.g., non-sequel, non-reboot)”



SOURCE: LUMINATE ENTERTAINMENT 365; BASE: U.S. MOVIE WATCHERS



OBSSESSION

CREDIT: FOCUS FEATURES

Younger adults have the highest demand for original films.

Despite the success of non-franchise films including *Project Hail Mary* and *Obsession* in H1, Luminate survey data suggests the demand for more “original” Hollywood movies is often overstated. Among U.S. movie watchers, no more than a third of any age demographic agreed with the statement, “I wish there were more original movies to see in theaters.”

Interestingly, however, demand was highest among younger adults, with the share of those agreeing falling off significantly among consumers 45 and older. This suggests that not only are Gen Z and Millennial moviegoers driving original films’ box office success, but more of them can be lured to theaters with the right non-franchise titles.

/ 03

MIDYEAR MUSIC RANKINGS



Global Top 10 Songs

On-Demand Audio streams

	ARTIST	TITLE	AUDIO STREAMS
1	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“Golden”	1.124 billion
2	Taylor Swift	“The Fate of Ophelia”	1.115 billion
3	Djo	“End of Beginning”	1.029 billion
4	Alex Warren	“Ordinary”	1.015 billion
5	Olivia Dean	“Man I Need”	1.011 billion
6	BTS	“SWIM”	0.987 billion
7	Bad Bunny	“DtMF”	0.974 billion
8	Tame Impala & JENNIE	“Dracula”	0.942 billion
9	Dominic Fike	“Babydoll”	0.904 billion
10	sombr	“back to friends”	0.848 billion

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Top 10 Songs

On-Demand Audio streams

	ARTIST	TITLE	AUDIO STREAMS
1	Ella Langley	“Choosin’ Texas”	570.9 million
2	Olivia Dean	“Man I Need”	340.2 million
3	Alex Warren	“Ordinary”	322.8 million
4	Ella Langley	“Be Her”	289.1 million
5	Bad Bunny	“DtMF”	284.5 million
6	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“Golden”	282.8 million
7	PinkPantereess with Zara Larsson	“Stateside”	272.4 million
8	Bruno Mars	“I Just Might”	267.3 million
9	Taylor Swift	“The Fate of Ophelia”	255.7 million
10	Olivia Dean	“So Easy (To Fall In Love)”	252.9 million

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Top 10 Albums

Album equivalents

	ARTIST	TITLE	TOTAL ALBUM-EQUIVALENT CONSUMPTION	ALBUM SALES	SONG SALES	ON-DEMAND AUDIO STREAMS	ON-DEMAND VIDEO STREAMS
1	Morgan Wallen	<i>I'm The Problem</i>	2.035 million	47,000	96,000	2.061 billion	1.9 million
2	Ella Langley	<i>Dandelion</i>	1.638 million	103,000	374,000	1.542 billion	2.4 million
3	Bad Bunny	<i>DeBÍ TiRAR Más FOToS</i>	1.543 million	306,000	84,000	1.312 billion	1.2 million
4	BTS	<i>ARIRANG</i>	1.492 million	910,000	297,000	0.580 billion	3.4 million
5	Noah Karan	<i>The Great Divide</i>	1.349 million	285,000	69,000	1.076 billion	0.9 million
6	Olivia Dean	<i>The Art of Loving</i>	1.309 million	201,000	112,000	1.143 billion	1.2 million
7	Drake	<i>ICEMAN</i>	1.300 million	16,000	33,000	1.313 billion	5.5 million
8	Don Toliver	<i>OCTANE</i>	1.212 million	62,000	18,000	1.203 billion	0.4 million
9	Taylor Swift	<i>The Life of a Showgirl</i>	0.992 million	100,000	145,000	0.903 billion	4.2 million
10	Morgan Wallen	<i>One Thing at a Time</i>	0.968 million	8,000	32,000	1.007 billion	0.4 million

SOURCE: LUMINATE MUSIC CONSUMPTION DATA; TOP 10 ALBUMS (ALBUM SALES+TRACK-EQUIVALENT ALBUMS+ON-DEMAND STREAM-EQUIVALENT ALBUMS): RANKED BY EQUIVALENT ALBUM UNITS, COMPRISING ALBUM SALES, TRACK-EQUIVALENT ALBUMS AND STREAMING-EQUIVALENT ALBUMS; EACH UNIT=ONE ALBUM SALE OR 10 TRACKS SOLD FROM AN ALBUM OR 1,000 PREMIUM ON-DEMAND OFFICIAL STREAMS; 2,500 AD-SUPPORTED ON-DEMAND OFFICIAL STREAMS BY SONGS FROM AN ALBUM (UGC ON-DEMAND STREAMS NOT INCLUDED)

U.S. Top 10 Vinyl Albums

Total sales

	ARTIST	TITLE	SALES
1	BTS	<i>ARIRANG</i>	331,000
2	Bad Bunny	<i>DeBí TiRAR Más FOToS</i>	283,000
3	Harry Styles	<i>Kiss All the Time. Disco, Occasionally.</i>	247,000
4	Olivia Rodrigo	<i>you seem pretty sad for a girl so in love</i>	206,000
5	Noah Kahan	<i>The Great Divide</i>	185,000
6	Michael Jackson	<i>Thriller</i>	162,000
7	Olivia Dean	<i>The Art of Loving</i>	159,000
8	Bruno Mars	<i>The Romantic</i>	113,000
9	Michael Jackson	<i>Number Ones</i>	101,000
10	J. Cole	<i>The Fall-Off</i>	96,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Top 10 CD Albums

Total sales

	ARTIST	TITLE	SALES
1	BTS	<i>ARIRANG</i>	567,000
2	ENHYPEN	<i>THE SIN : VANISH</i>	286,000
3	ATEEZ	<i>GOLDEN HOUR : PART 4</i>	263,000
4	ATEEZ	<i>GOLDEN HOUR : PART 5</i>	212,000
5	CORTIS	<i>GREENGREEN</i>	169,000
6	Stray Kids	<i>DO IT</i>	141,000
7	TOMORROW X TOGETHER	<i>7TH YEAR: A Moment of Stillness in the Thorns</i>	123,000
8	Harry Styles	<i>Kiss All the Time. Disco, Occasionally.</i>	121,000
9	Olivia Rodrigo	<i>you seem pretty sad for a girl so in love</i>	114,000
10	KATSEYE	<i>SIS (Soft Is Strong)</i>	106,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Share of Total Volume, by Format & Genre

Selected top main genres

	GENRE	ALBUMS + TEA + SEA ON-DEMAND	TOTAL ON-DEMAND STREAMS	ON-DEMAND AUDIO STREAMS	ON-DEMAND VIDEO STREAMS	TOTAL ALBUMS SALES	PHYSICAL ALBUM SALES	DIGITAL ALBUM SALES	DIGITAL SONG SALES
1	R&B/Hip-Hop	23.9%	24.8%	24.6%	27.4%	12.7%	13.2%	10.0%	13.1%
2	Rock	20.2%	18.2%	18.7%	12.0%	43.3%	44.5%	36.2%	23.3%
3	Pop	12.2%	11.9%	12.0%	11.0%	15.1%	16.0%	9.8%	15.6%
4	Country	8.6%	8.4%	8.7%	5.0%	5.8%	5.3%	9.0%	11.3%
5	Latin	8.1%	9.2%	8.6%	16.9%	1.5%	1.5%	1.8%	2.7%
6	Dance/Electronic	4.2%	4.2%	4.3%	3.2%	2.1%	1.9%	3.3%	6.9%
7	World Music	2.6%	2.5%	2.4%	3.9%	6.3%	6.9%	2.7%	2.2%
8	Christian/Gospel	2.2%	2.2%	2.2%	2.5%	1.1%	0.7%	3.3%	4.2%
9	Children	1.2%	1.3%	1.1%	3.6%	0.5%	0.4%	0.1%	0.6%
10	Jazz	0.9%	0.7%	0.7%	0.3%	2.8%	2.7%	3.2%	1.1%
11	Classical	0.8%	0.7%	0.7%	0.2%	1.2%	0.9%	0.3%	0.8%

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Top 10 Radio Songs

Based on audience impressions

	ARTIST	TITLE	AUDIENCE
1	Bruno Mars	“I Just Might”	1.963 billion
2	Olivia Dean	“Man I Need”	1.795 billion
3	Kehlani	“Folded”	1.673 billion
4	Alex Warren	“Ordinary”	1.574 billion
5	Ella Langley	“Choosin’ Texas”	1.420 billion
6	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“Golden”	1.367 billion
7	Taylor Swift	“The Fate of Ophelia”	1.317 billion
8	sombr	“back to friends”	1.268 billion
9	Leon Thomas	“MUTT”	1.245 billion
10	Olivia Dean	So Easy (To Fall In Love)	1.210 billion

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

Canada Top 10 Albums

Album equivalents

	ARTIST	TITLE	TOTAL ALBUM-EQUIVALENT CONSUMPTION	ALBUM SALES	SONG SALES	ON-DEMAND AUDIO STREAMS	ON-DEMAND VIDEO STREAMS
1	Morgan Wallen	<i>I'm The Problem</i>	181,000	2,000	6,000	187.0 million	175,000
2	Drake	<i>ICEMAN</i>	178,000	2,000	3,000	182.0 million	973,000
3	Noah Kahan	<i>The Great Divide</i>	167,000	14,000	7,000	155.3 million	119,000
4	Ella Langley	<i>Dandelion</i>	148,000	4,000	28,000	145.4 million	227,000
5	Olivia Dean	<i>The Art of Loving</i>	130,000	6,000	8,000	129.4 million	157,000
6	Taylor Swift	<i>The Life of a Showgirl</i>	123,000	6,000	16,000	119.7 million	472,000
7	Noah Kahan	<i>Stick Season</i>	116,000	3,000	3,000	117.2 million	36,000
8	Alex Warren	<i>You'll Be Alright, Kid</i>	115,000	1,000	11,000	121.2 million	188,000
9	Bad Bunny	<i>DeBÍ TIRAR Más FOToS</i>	112,000	5,000	8,000	111.4 million	56,000
10	Don Toliver	<i>OCTANE</i>	108,000	2,000	1,000	111.1 million	50,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA; TOP 10 ALBUMS (ALBUM SALES+TRACK-EQUIVALENT ALBUMS+ON-DEMAND STREAM-EQUIVALENT ALBUMS): RANKED BY EQUIVALENT ALBUM UNITS, COMPRISING ALBUM SALES, TRACK-EQUIVALENT ALBUMS AND STREAMING-EQUIVALENT ALBUMS; EACH UNIT=ONE ALBUM SALE OR 10 TRACKS SOLD FROM AN ALBUM OR 1,000 PREMIUM ON-DEMAND OFFICIAL STREAMS; 2,500 AD-SUPPORTED ON-DEMAND OFFICIAL STREAMS BY SONGS FROM AN ALBUM (UGC ON-DEMAND STREAMS NOT INCLUDED)

Canada Top 10 Songs

On-Demand Audio streams

	ARTIST	TITLE	AUDIO STREAMS
1	Ella Langley	“Choosin’ Texas”	59.8 million
2	Alex Warren	“Ordinary”	48.5 million
3	Taylor Swift	“The Fate of Ophelia”	41.1 million
4	Olivia Dean	“Man I Need”	41.1 million
5	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“Golden”	37.4 million
6	Tame Impala & JENNIE	“Dracula”	34.2 million
7	Dominic Fike	“Babydoll”	33.8 million
8	PinkPantheress with Zara Larsson	“Stateside”	33.7 million
9	Djo	“End of Beginning”	32.9 million
10	Bruno Mars	“I Just Might”	31.1 million

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

TREND BREAKS IN 2026

Album-Equivalent Ratios: U.S. album-equivalent ratios in the Luminate CONNECT platform and in the Billboard charts were updated in Week 1, 2026. The new ratio for album equivalency is that 1 album=1,000 premium audio or video streams=2,500 ad-supported audio or video streams. The pre-2026 ratio of 1 album=1,250 premium audio or video streams=3,750 ad-supported audio or video streams has been replaced where relevant in this report by the new ratios to provide accurate historical trending.

METRICS

Export Power: The Luminate Export Power Rank is a metric designed to evaluate a country's ability to export 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 region; the streaming size of importing countries; and the number of artists per export country reaching international audiences.

MIDYEAR MUSIC RANKINGS

As of Week 3 of 2026, YouTube audio and video activity is no longer included in the Billboard charts; however, YouTube data is included in the Luminate equivalent and streaming numbers found on pages 62-64, 67, 69-70.

WHAT DETERMINES A SUPERFAN?

A superfan is someone who engages with artists and their content in many ways. The data we collect represents the percentage of music listeners who engage with artists and their content in five or more ways from this list: Attend an in-person live music performance; talk about the artist with friends or family; attend a virtual live music performance; purchase physical copies of music (e.g., vinyl, CDs); purchase physical merchandise; purchase digital copies of music (songs or albums); post about the artist on social media; interact with the artist on chat forums or networks (e.g., Discord, Reddit); sign up for artist newsletters; subscribe to a fan club or other fan group; tip artists in person or virtually; purchase virtual merchandise; directly fund the artist (e.g., Venmo, Cash App, Patreon).

WHAT IS SHARE POINT CHANGE?

Throughout this report, there are references to “share point change.” An example of this is in “highest-growth genres,” where Dance/Electronic shows a .51 gain relative to other genres. Share point change measures how much one share increases or decreases relative to another, taking volume into account and expressed in percentage points rather than raw percentages.

Data Sources

This *2026 Midyear Report* is powered by Luminate’s industry-leading music consumption, data enrichment and consumer research insights products. All data and products are commercially available.

MUSIC CONSUMPTION BY CONNECT

The music consumption data in this report is sourced from CONNECT, which aggregates data from over 500 verified streaming, retail and airplay sources and tracks millions of artists, albums and songs across 60+ global markets.

U.S. MUSIC 360 & REGIONAL MUSIC 360

Consumer behaviors and preferences related to music fan engagement, including music and artist discovery, genres and language preferences, time and money spent, streaming and platform use and live music preferences.

ARTIST + GENRE TRACKER

Consumer behaviors and preferences related to music fan engagement with artists and across genres, including awareness, likability, perceptions, discovery, merchandise, purchasing and influence.

FILM & TV METADATA

Verified and timely intelligence on people, projects and companies across the global entertainment industry.

U.S. ENTERTAINMENT 365

Consumer behaviors and preferences related to entertainment and how consumers allocate their leisure time across all available entertainment channels, including time and money spent, discovery and engagement, platform preferences, subscription models, motivations and category purchasing.

LUMINATE INDEX

A ranking of today’s most influential talent, incorporating proprietary audience data, social media data and the same exclusive Luminate data that powers the Billboard charts.

STREAMING VIEWERSHIP, MODELED, OR SV(M)

A modeled approach to measuring viewership on the major U.S. streaming platforms; reports minutes watched and views for library and original content, as well gender and age demographics.

Data Sources

NEW DATA PROVIDERS IN 2026

Streaming	
Tencent	Adds Chinese music activity into Luminate’s global dataset (see chart at right)
Deezer	Strengthens global and country datasets, particularly in Europe
Spotify Video	Provides deeper insight into how video is shaping music consumption

Physical	
Merch Cat	Official venue sales with real-time merchandise inventory tracking and analytics
Books-A-Million	One of the U.S.’ largest book retailers that also sells vinyl and CD albums



MIDYEAR REPORT/TRENDS IN MUSI

& FILM — 2026



LUMINATE