HYBE AMERICA AND LUMINATE PARTNER TO SUPPORT BTS' HISTORIC COMEBACK ERA

LUMINATE | HYBE WE BELIEVE IN MUSIC

EXECUTIVE SUMMARY

With the BTS comeback in spring 2026 delivering the album *ARIRANG*, HYBE partnered with Luminate to develop a data-informed strategy for the vinyl format. Through a collaborative relationship, HYBE and Luminate conducted customized data pulls to analyze the changing landscape of global music consumption.

The execution of the vinyl strategy yielded historic commercial results:

208K

208,000 vinyl units were sold in the first week alone.

#6

This became the 6th largest vinyl week in the modern era for any artist and stands as the largest vinyl week by a group since tracking began in 1991.

No. 1

These 208,000 vinyl units made up nearly 40% of the album's 532,000 pure album sales, which helped secure the No. 1 debut on the Billboard 200.

A HISTORIC MILESTONE FOR THE MODERN ERA

The release of BTS' *ARIRANG* secured its place in music history by achieving one of the top first-week vinyl sales for an album in the modern era. According to Billboard reporting, the album opened at No. 1 on the Billboard 200, with 641,000 equivalent album units driven heavily by 532,000 in pure album sales.

Vinyl accounted for 208,000 copies of those pure sales. This marks BTS' best-ever sales week on vinyl and stands as the largest vinyl sales week by a group since Luminate began electronically tracking sales in 1991. Solo pop acts dominate the top 5 spots, which makes this achievement by a group a significant demonstration of their physical product sales power.

"With Luminate CEO Rob Jonas, we decided to innovate a new type of working relationship where our teams would explore a range of new questions about music fan behaviors. We examined vinyl trends and cross-examined it with other music consumption habits. With the data, my team was able to extrapolate insights to inform how we should approach physical formats."

ISAAC LEE,
CEO OF HYBE AMERICA

THE POWER OF PHYSICAL SALES ON BILLBOARD CHARTS

Physical sales remain a massive catalyst for chart placement. Secure physical transactions such as CDs, vinyl and cassettes can impact the Billboard 200 heavily. Tapping into vinyl provides artists with a lucrative revenue stream separate from standard digital streaming economics.

THE K-POP LANDSCAPE: PHYSICAL HEAVY, VINYL LIGHT

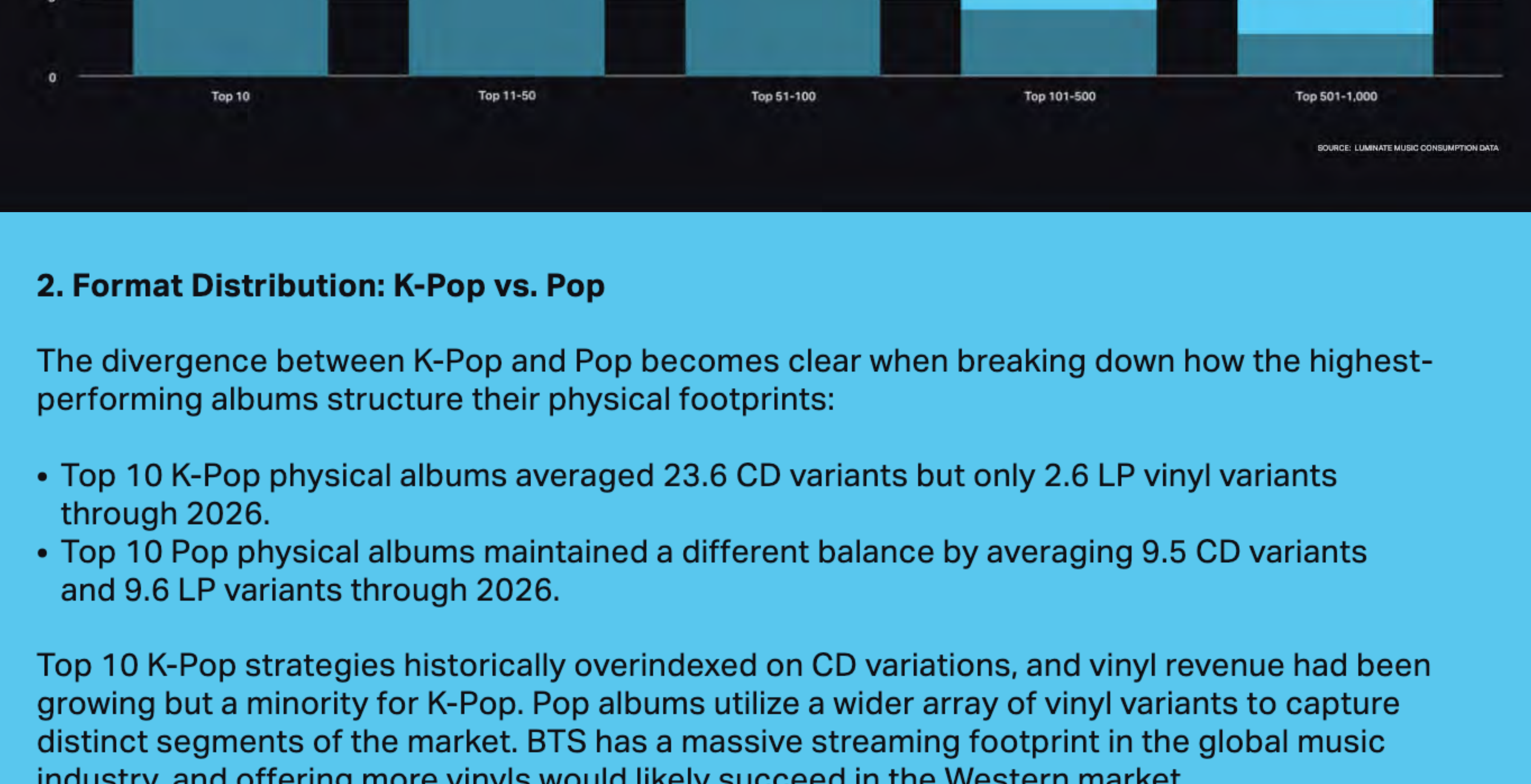
The K-Pop sector sells a lot of physical media, and the demand has historically centered on CDs, as they were easy to produce in Korea and Japan. K-Pop fans are avid collectors, and we saw an opportunity in vinyl because BTS' market power mirrors mainstream pop icons, and pop acts heavily utilize vinyl variants to offer valuable collectibles to fans. With the comeback, BTS offered vinyl, which ended up unlocking new revenue.

K-POP VS. POP: INDUSTRY BENCHMARKS

An analysis of market consumption data highlights the standard dynamics of top-performing albums on the Billboard 200:

1. The Proliferation of Physical Variants

Luminate consumption data tracks a steady upward trajectory in physical variants among elite releases. Physical variants, defined by unique UPCs per album release, have become an increasingly popular tactic to secure a Top 10 Billboard 200 placement.



2. Format Distribution: K-Pop vs. Pop

The divergence between K-Pop and Pop becomes clear when breaking down how the highest-performing albums structure their physical footprints:

- Top 10 K-Pop physical albums averaged 23.6 CD variants but only 2.6 LP vinyl variants through 2026.
- Top 10 Pop physical albums maintained a different balance by averaging 9.5 CD variants and 9.6 LP variants through 2026.

Top 10 K-Pop strategies historically overindexed on CD variations, and vinyl revenue had been growing but a minority for K-Pop. Pop albums utilize a wider array of vinyl variants to capture distinct segments of the market. BTS has a massive streaming footprint in the global music industry, and offering more vinyls would likely succeed in the Western market.

Previous BTS Vinyl Performance

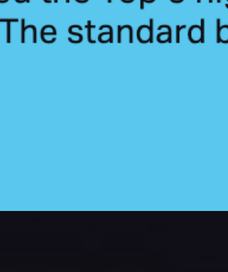
Historical data for BTS' vinyl performance was sparse prior to this rollout, because the group's previous releases focused on robust, multi-edition CD box sets. HYBE had plans to launch vinyls, and HYBE America worked with Luminate to understand the previous trends in vinyl in the U.S.

LUMINATE RECOMMENDATION

HYBE went to Luminate with a request to understand vinyl, because it was going to be a part of its next major release. Based on the data, HYBE decided to invest in significantly more vinyl variants than prior BTS album launches by expanding beyond a single standard release and introducing member-specific versions.

Historical data revealed that Top 10 Billboard 200 albums rely heavily on a multi-variant strategy, yet K-Pop acts averaged fewer than 3 vinyl variants per release compared with 10 variants for mainstream pop acts. Because BTS commands a massive, collector-driven fanbase, diversifying the vinyl catalog allowed the campaign to target the high-indexing collectibles market and capture significant revenue that previously went unrealized.

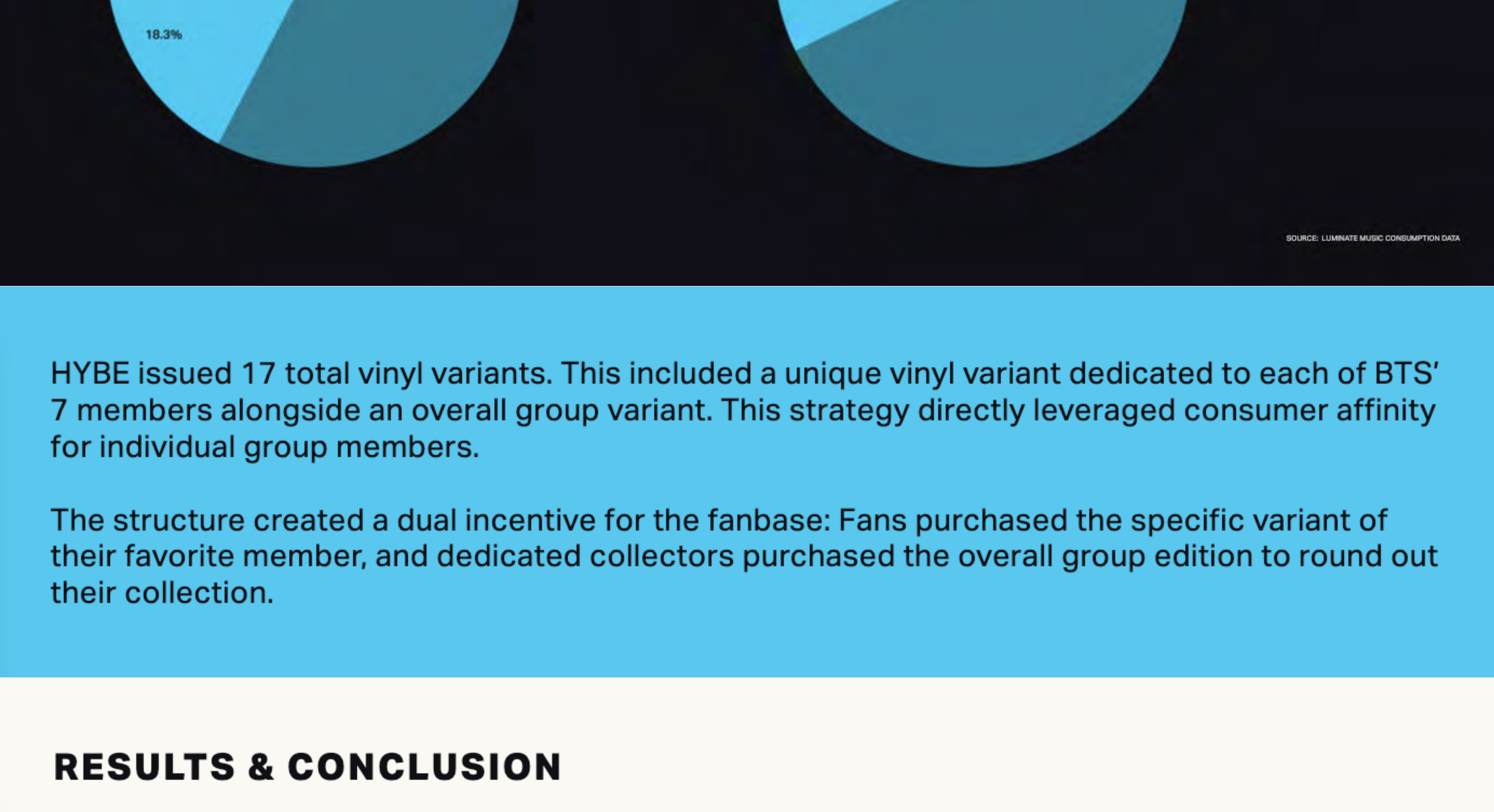
"Working closely with HYBE, we saw an opportunity to rethink the physical music strategy for BTS. The data showed how highly engaged their collector fanbase was, and that insight helped inform a new approach to vinyl, including member-specific editions. The historic first-week results show what's possible when a deep understanding of audience behavior translates into smart commercial strategy."



ROB JONAS,
CEO OF LUMINATE

THE MEMBER VARIANT VINYL STRATEGY

Luminate analyzed physical sales data from 2026 that identified the Top 5 highest-performing vinyl variants typically account for 97.6% of an album's vinyl sales. The standard breakdown of U.S. vinyl sales by variant follows a predictable distribution:



HYBE issued 17 total vinyl variants. This included a unique vinyl variant dedicated to each of BTS' 7 members alongside an overall group variant. This strategy directly leveraged consumer affinity for individual group members.

The structure created a dual incentive for the fanbase: Fans purchased the specific variant of their favorite member, and dedicated collectors purchased the overall group edition to round out their collection.

RESULTS & CONCLUSION

The execution of the member-centric vinyl strategy yielded historic commercial results:

The strategy directly drove 208,000 vinyl units in the first week alone.

This became the 6th-largest vinyl week in the modern era for any artist and stands as the largest vinyl week by a group since tracking began in 1991.

Those 208,000 first-week vinyl units made up nearly 40% of the album's 532,000 pure sales, which helped secure it the No. 1 debut on the Billboard 200.

HYBE established a new industry blueprint for physical monetization by blending K-Pop collectibility structures with mainstream pop vinyl distribution, leveraging Luminate data to make data-informed decisions.

CONCLUSION: BTS GENRE BREAKOUT

The historic success of this vinyl campaign stems from a fundamental reality: BTS has broken out of the traditional constraints of the K-Pop category. Luminate's Artist + Genre Tracker (AGT) measures this scale, showing that BTS achieved an awareness of 42% post return in the U.S. This metric places the group on par with major global mainstream icons including Olivia Rodrigo, Morgan Wallen and Travis Scott. BTS' awareness is in the 78th percentile of all 700+ tracked artists, where the median artist's awareness is 14% (e.g., BTS is more well known than roughly 4 in 5 artists Luminate has in their AGT).

This footprint significantly exceeds the K-Pop genre average of 9% median and 11% mean among the 22 K-Pop acts tracked. Outside of one other major group at 25% awareness, peer acts remain localized, landing anywhere from 5% to 15% in awareness. By leveraging Luminate's consumer funnel insights to analyze this high likability and awareness, HYBE recognized that treating BTS like global pop powerhouses, rather than a niche genre act, would unlock the massive consumer base necessary to drive these record-breaking vinyl sales.