

ALL THAT MATTERS // OCTOBER 2026

WHERE CULTURE MEETS SCALE

Spotlight on Asia-Pacific Music Trends

LUMINATE

Introduction

ALL THAT MATTERS // OCTOBER 2026



Scott Ryan

Chief Revenue Officer

AGENDA

ALL THAT MATTERS // OCTOBER 2026

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|----|--|
| 01 | Luminate in Focus |
| 02 | State of Streaming: APAC Music Consumption |
| 03 | Global Export: Growth of APAC Markets in International Territories |
| 04 | Leveraging Transmedia in Global Music Industry |
| 05 | Takeaways |
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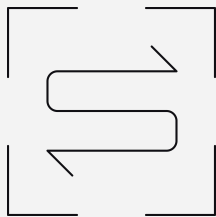
A person is shown in silhouette, performing at a DJ booth. The scene is dramatically lit with several bright, angled light beams cutting through a dark, hazy atmosphere. The person is positioned in the center-left, facing right, with their hands near the DJ equipment. A microphone on a stand is visible in front of them. The overall mood is moody and energetic.

/01

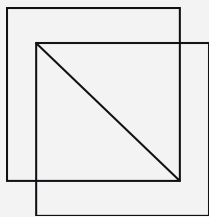
Luminate in Focus

Luminate

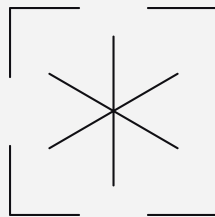
The trusted independent leader in entertainment consumption, audience intelligence and metadata



**Music
Consumption
& Rights**

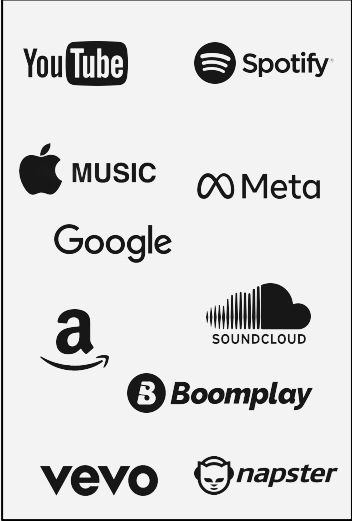
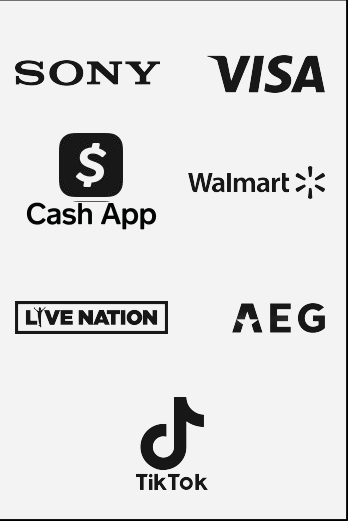


**Film / TV
Viewership
& Metadata**



**Audience
Insights &
Intelligence**

The Global Entertainment Ecosystem Trusts Luminate

Music Labels & Distributors	Platforms & Tech	Valuation & Publishing Rights Management	Media & Entertainment	Brands
				

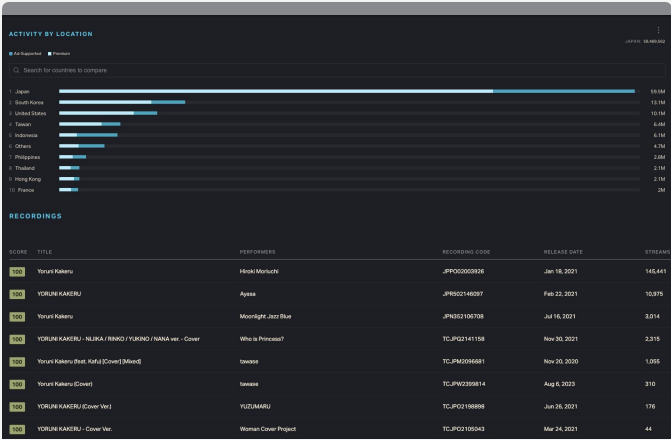
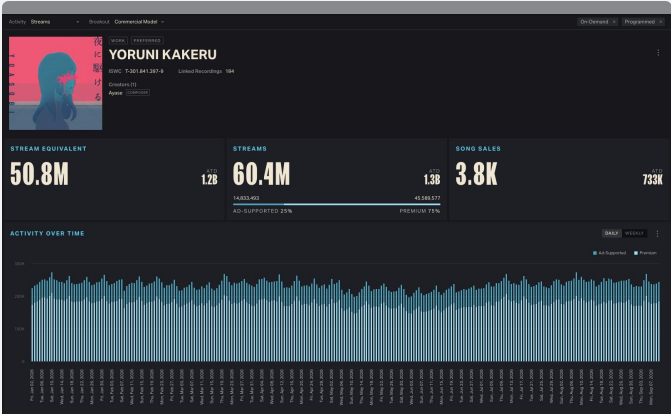
Our Portfolio

	Consumption	Metadata
Music	Consumption Activity - Recording & Publishing 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
Audience Insights	Audience Understanding - Custom Research, Analysis & Consultation Market research including surveys, reports, analysis and recommendations, based on client needs	

Publishing Works Data: Linking Works to Recordings

Navigate from a song's streaming performance directly to its underlying musical work; see who wrote it and how many recordings (covers, versions, remixes) are linked to that work.

- Optimize workflows
- Improve royalty forecasting
- Evaluate investment opportunities
- Enrich Metadata for more accurate reporting



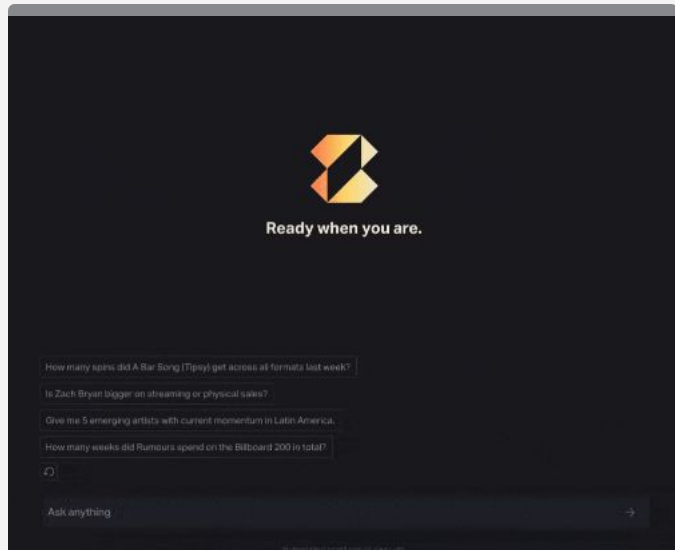
Lumi, Your Native Language AI Analyst

Let Lumi do the analysis for you.
Simply ask the question.

“Show me artists in the J-pop / anime soundtrack space who are trending or breaking out in Thailand over the past 3-6 months.”

“Find the Indonesia-based Pop artists with the biggest streaming growth over the last month”

“Pull out all Korean artists who have ranked in the Billboard Global 200 and their longest hit on that chart”



August 17, 2026 11:46 PM

ビルボードのグローバルチャートにランクインした日本人アーティストは

📄 🔗

🕒 Processed for 59s
🛠️ Ran 2 tools with 1 model >

今週(Week 202632、2026年8月7日～13日)のBillboard Global 200チャートの上位200位を確認したところ、日本出身のアーティストとして明確に確認できたのは以下の1組です。

順位	楽曲	アーティスト	レーベル
180	Dichavati	Helabussador, dj honda , Rey Tony, Ya Ice Dilan	JipMusic Global / Planet Records

dj honda(ディージェイ・ホンダ)は日本出身のDJ/プロデューサーで、この曲にフィーチャリング参加としてクレジットされています。

補足:

- この結果は今週の上位200位という1週間分のスナップショットに基づくものです。BTS、KATSEYE、Stray Kids、ATEEZ、ILLIT、LE SSERAFIM、JENNIEなど複数OK-POPアーティストはランクインしていますが、いずれも韓国出身のアーティストで、日本出身ではありません。
- このチャートのデータは2020年第36週(202036)から利用可能です。特定の週や、特定のアーティスト(例:YOASOBI、



/02

State of Streaming

APAC Music Consumption

Today's Global Music Market....

366M

Recording ISRCs Total in H1 2026

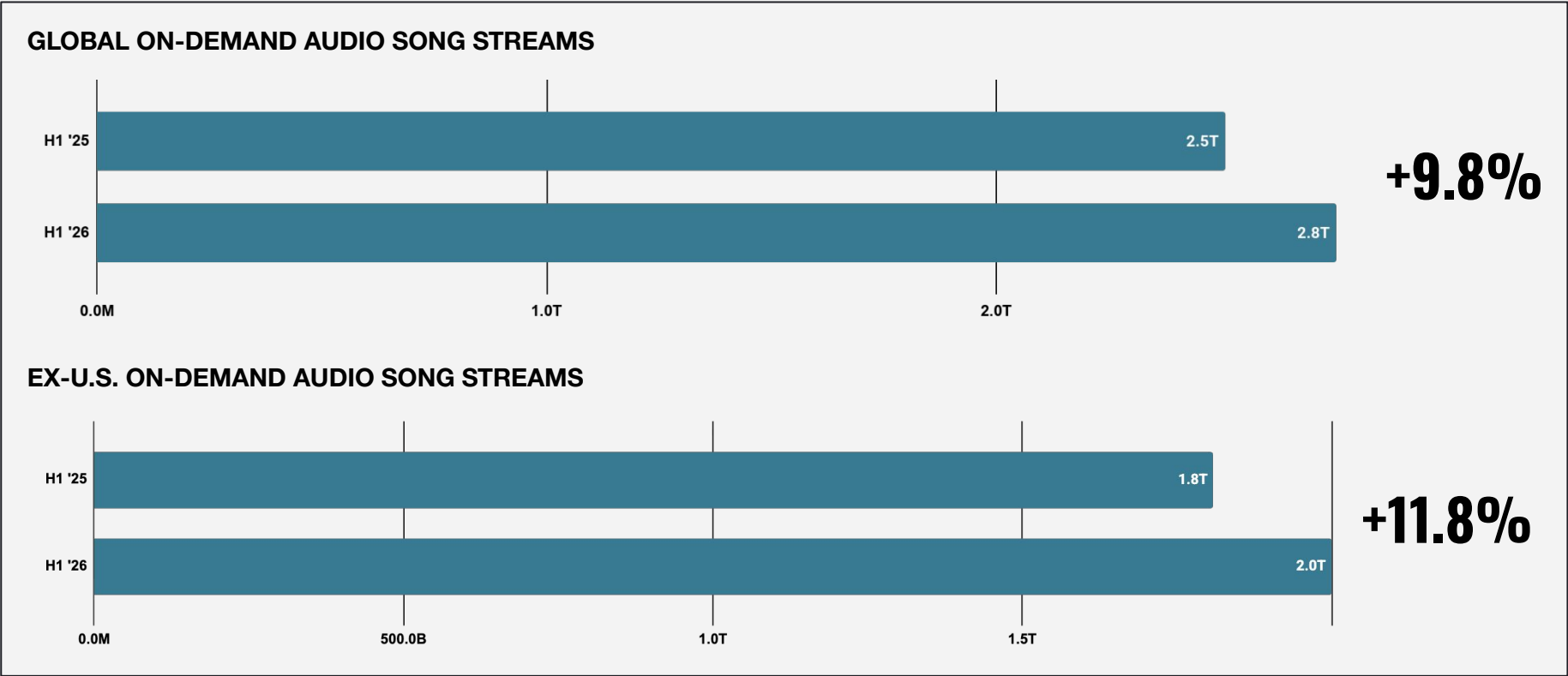
150K+

New ISRCs Per Day In H1 2026

735K

ISRCs or .2% = 80% of Global
Market Streaming

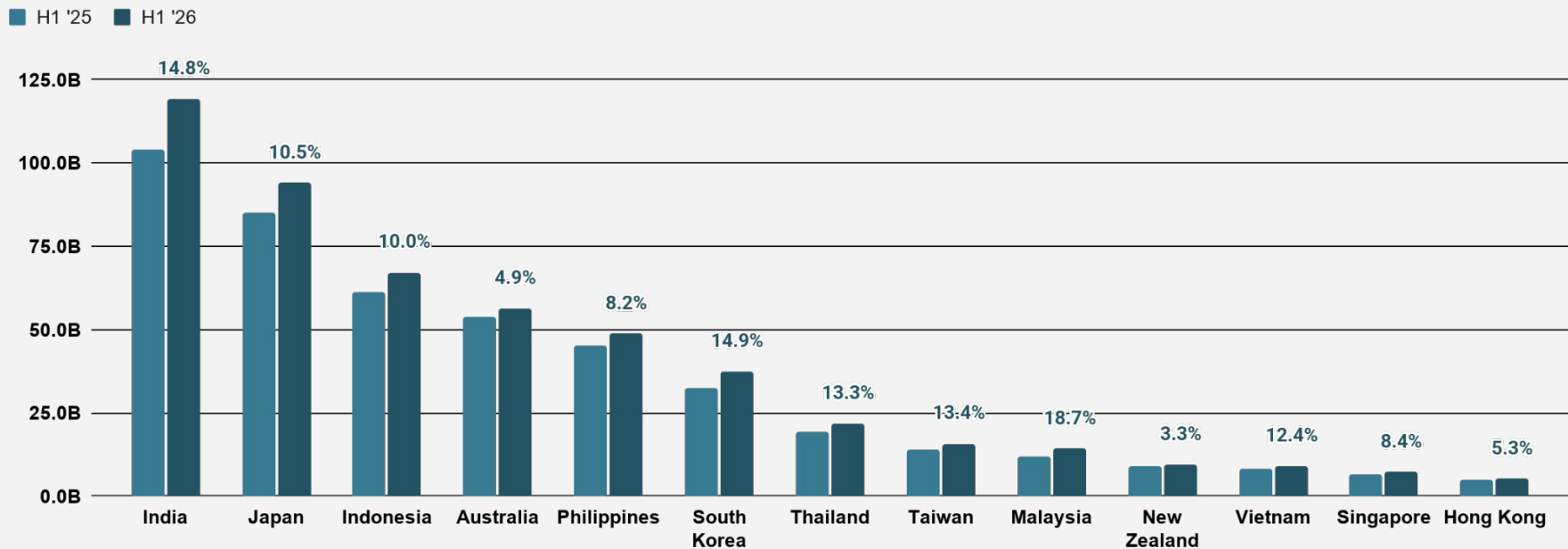
Global Music Metrics



On-Demand Audio streaming growth in the majority of APAC & ANZ countries is outpacing the global industry rate of 9.8%

TOP AUDIO STREAMING MARKETS: ASIA & AUSTRALIA/NZ

On-Demand Audio Streams, Weeks 1-26

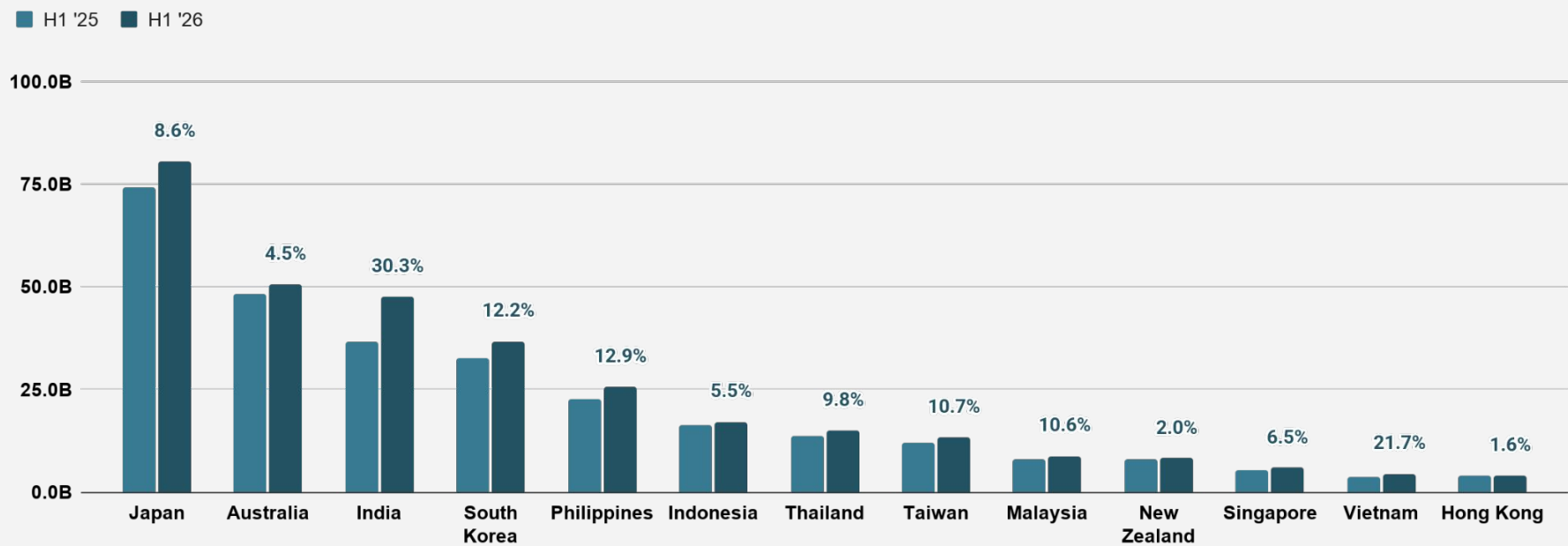


Top Premium Streaming Markets: APAC & ANZ

Globally, 62% of On-Demand (Audio + Video) streams are Premium, compared to just 38% in the APAC region.

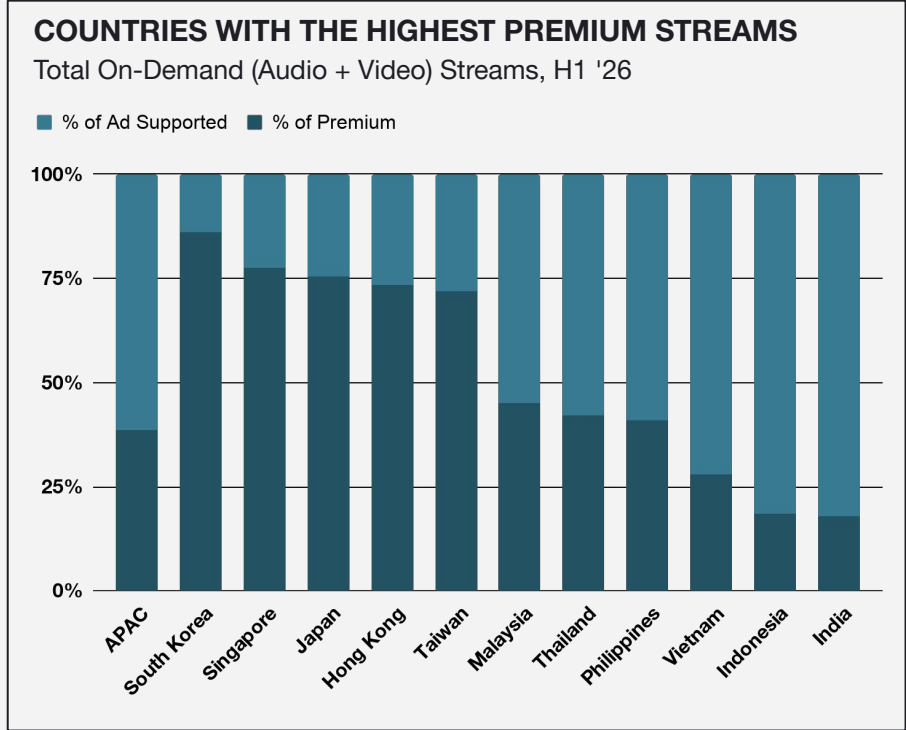
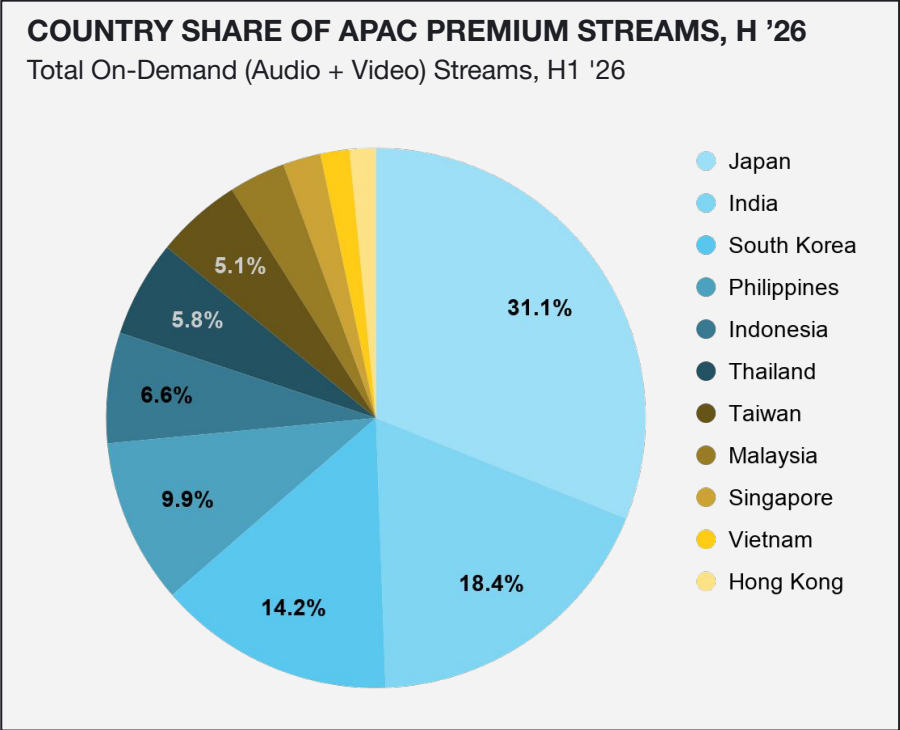
TOP AUDIO STREAMING MARKETS: ASIA & AUSTRALIA/NZ

Total Premium On-Demand (Audio + Video) Streams, Weeks 1-26



APAC's Premium Consumption Rely on Key Anchors While Emerging Markets Scale Up

Japan (31.1%) and South Korea (18.4%) account for half of regional premium volume, but Southeast Asia and India represent the next wave of ARPU conversion.



India: High-Intent Triggers: Live Events and Physical Product Subscription indicators

Festival-goers (+67%) and physical collectors (+41%) exhibit the highest conversion intent among non-paying listeners.

AMONG MUSIC LISTENERS NOT CURRENTLY PAYING FOR STREAMING...

+67%

Music Festival Attendees are 67% more likely to pay for a subscription to a streaming service in the next 6 months.

+41%

Physical Music Buyers are 41% more likely to pay for a subscription to a streaming service in the next 6 months.

+15%

Gamers are 15% more likely to pay for a subscription to a streaming service in the next 6 months.

Japan: Digital Buyers, Live Event Attendees, and Gamers Represent Conversion Pipeline

Non-paying music listeners who purchase digital downloads are +166% more likely to subscribe to streaming, followed by live attendees (+90%), gamers (+67%), and Gen Z (+55%).

AMONG MUSIC LISTENERS NOT CURRENTLY PAYING FOR STREAMING...

+166%

Digital Music Buyers are 166% more likely to pay for a subscription to a streaming service in the next 6 months.

+90%

Live Music Attendees are 90% more likely to pay for a subscription to a streaming service in the next 6 months.

+67%

Gamers are 67% more likely to pay for a subscription to a streaming service in the next 6 months.

+55%

Gen Z are 55% more likely to pay for a subscription to a streaming service in the next 6 months.

+38%

K-Pop Fans are 38% more likely to pay for a subscription to a streaming service in the next 6 months.

+25%

Millennials are 25% more likely to pay for a subscription to a streaming service in the next 6 months.

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Global Export

Growth of APAC & ANZ Markets in
International Territories



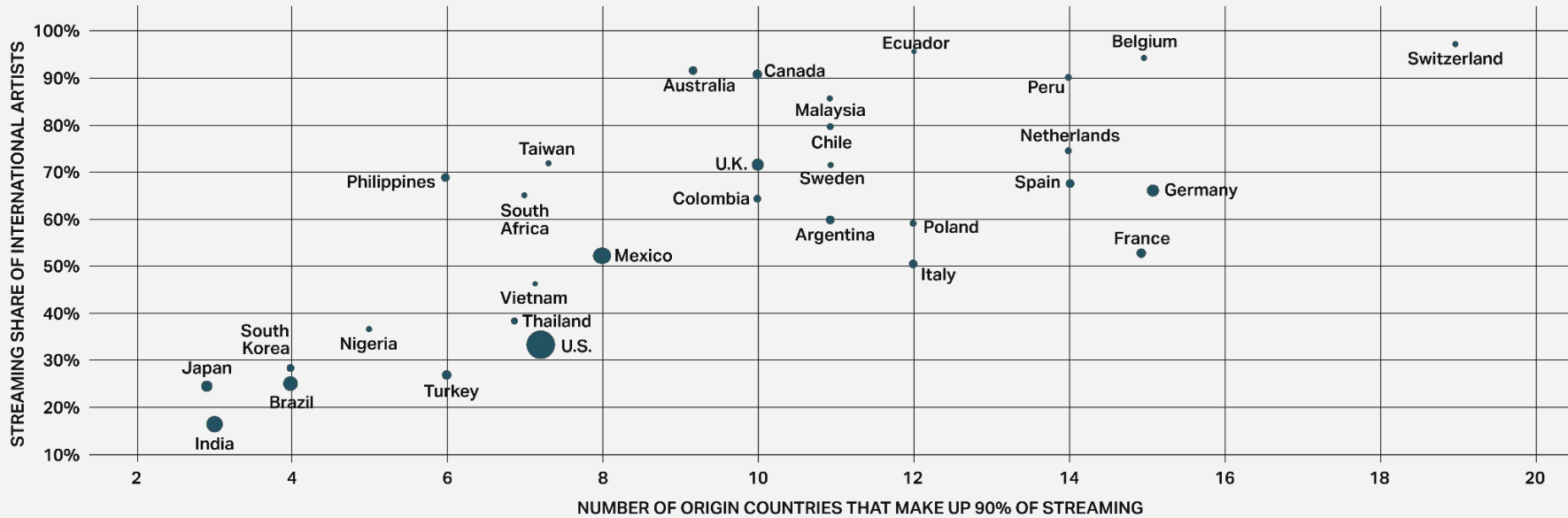
Domestic Consumption Varies Across Local Asian Music Ecosystems

Domestic repertoire dominates in India, Japan, and South Korea (~75%+ local share), whereas Southeast Asia (Taiwan, Philippines) acts as a global import hub.

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.

Market Size, Total On-Demand (Audio + Video) Streams • 60B • 250B • 600B



10 Regional APAC & ANZ Markets Increase in Global Export Rankings

South Korea (#3), Japan (#12), India (#13), and the Philippines (#28) are translating regional popularity into global streaming market share.

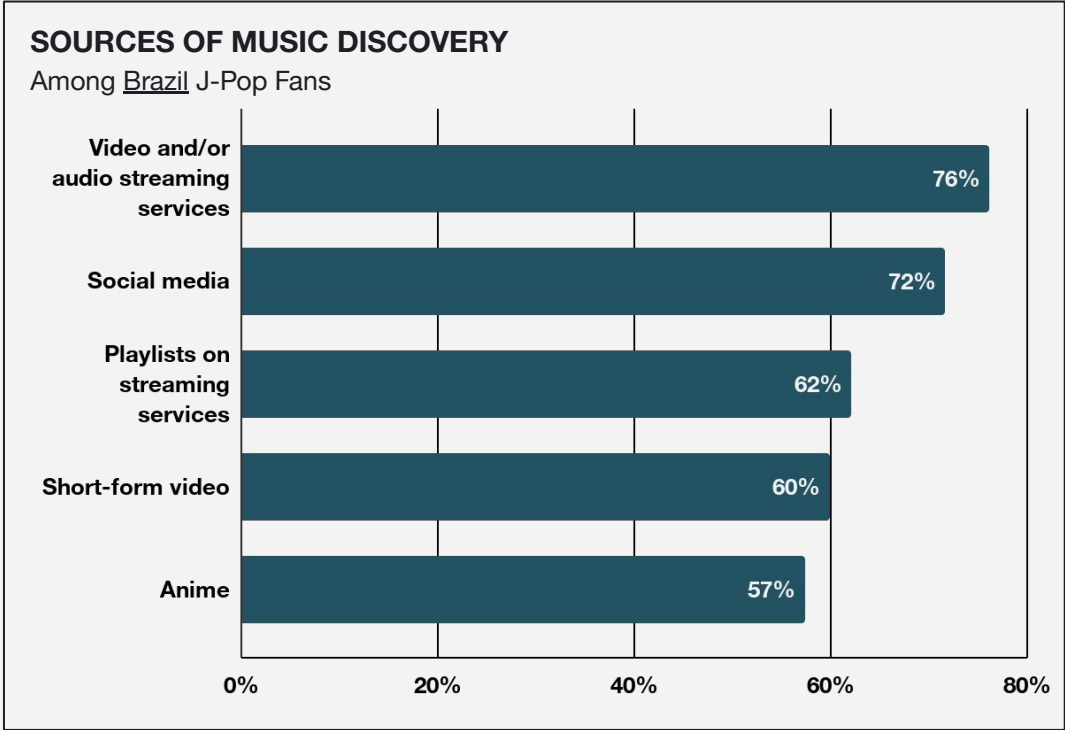
EXPORT POWER RANKING, H1 '26

GLOBAL H1 '26 RANK	GLOBAL H1 '25 RANK	COUNTRY	TOP IMPORTER 1	TOP IMPORTER 2	TOP IMPORTER 3
3	4	South Korea	Japan	Taiwan	United States
9	8	Australia	United States	United Kingdom	Canada
12	13	Japan	South Korea	Taiwan	Hong Kong
13	14	India	UAE	Kuwait	Oman
28	30	Philippines	Qatar	Kuwait	UAE
32	35	Thailand	Indonesia	Taiwan	Vietnam
37	40	Indonesia	Malaysia	Singapore	Philippines
38	48	Taiwan	Malaysia	Singapore	Hong Kong
40	39	New Zealand	United States	Australia	India
47	48	Vietnam	India	Indonesia	South Korea
61	53	Malaysia	Indonesia	Singapore	Taiwan
75	77	Singapore	Taiwan	Malaysia	Hong Kong
130	131	Hong Kong	Taiwan	Malaysia	Singapore



Brazil: International Export: Discovery Sources Among Brazilian J-Pop Fans

76% of Brazilian J-Pop fans discover through streaming, 72% via social platforms, and 62% via DSP playlists; 83% advocate for curated recommendation engines.



AMONG BRAZIL J-POP FANS...

78%

Say “New services and technology have made it easier for me to discover new music artists and music”

67%

Say “I am the first among my friends to discover new music and artists”

83%

Say “Curated playlists and recommendations from others are a great way to discover new music

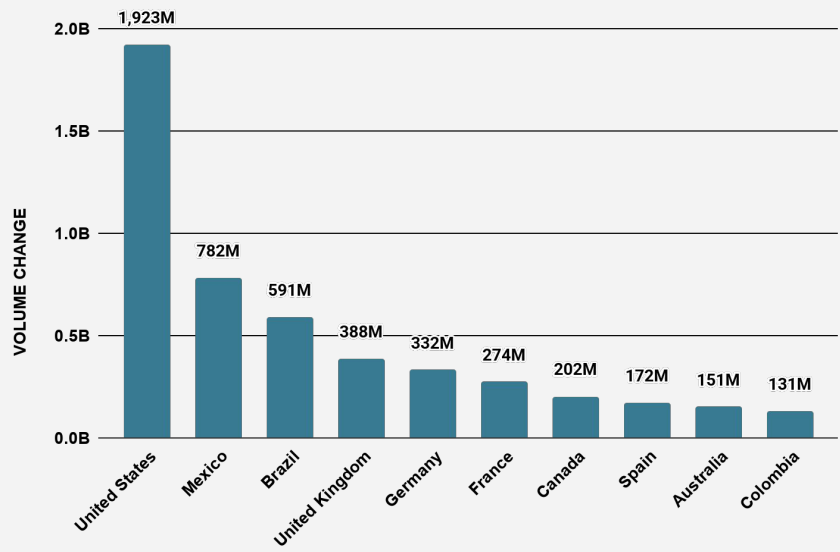


Asian Pop Crossover Growth in Latin America and the United States leads ex Asia Growth

Non-APAC volume growth for Asian repertoire is heavily concentrated in the US, Mexico, and Brazil.

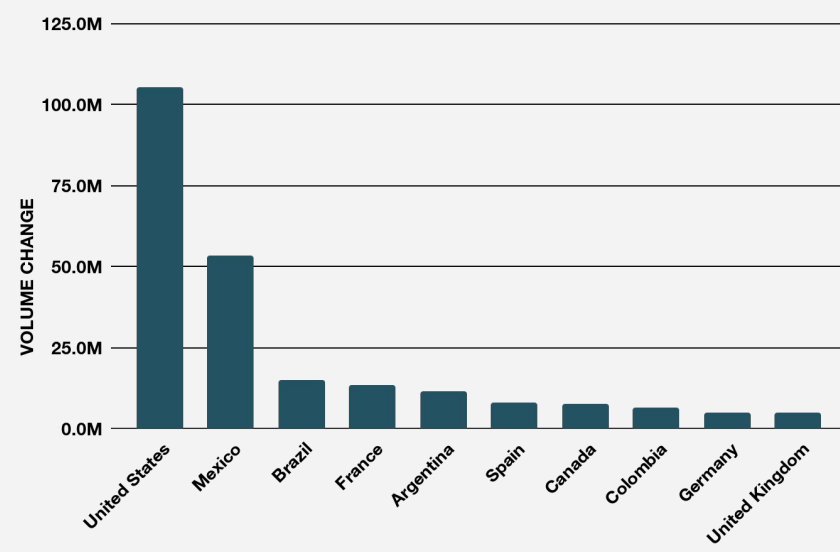
TOP K-POP GROWTH MARKETS BY VOLUME CHANGE (EXCLUDING APAC)

Total On-Demand Official Streams



TOP J-POP GROWTH COUNTRIES BY VOLUME CHANGE (EXCLUDING APAC)

Japan Total On-Demand Streams, H1 '26



USA: The K-Pop Playbook: Monetizing Overseas Fandom Through Mass Retail

Mass-market retail (Target, Walmart) captured ~30% of US physical sales, led by collectible packaging from BTS, ENHYPEN, and ATEEZ.

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 1-25, 2026

ARTIST	TITLE	PHYSICAL SALES AT MASS MARKET
BTS	ARIRANG	727.0K
ENHYPEN	THE SIN: VANISH	229.8K
ATEEZ	GOLDEN HOUR: Part 4	194.0K





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Transmedia Synergies

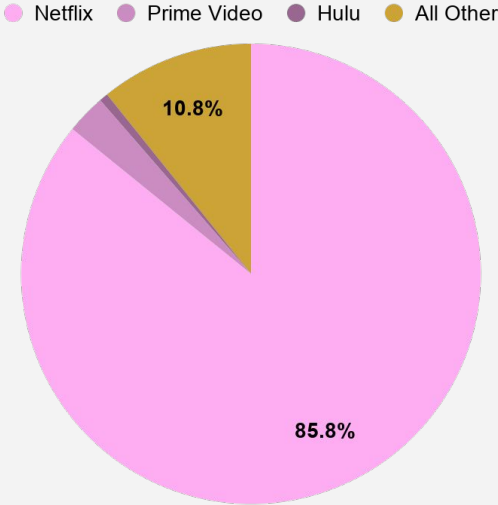
Screen, Gaming, and Anime as Global
Launchpads for Asian Intellectual Property

USA: Global Streaming Platforms Function as the Primary Global Pipeline for Asian Content and Culture

Netflix holds an 85.8% market share of U.S. anime viewing, providing unmatched global reach for featured Asian theme songs.

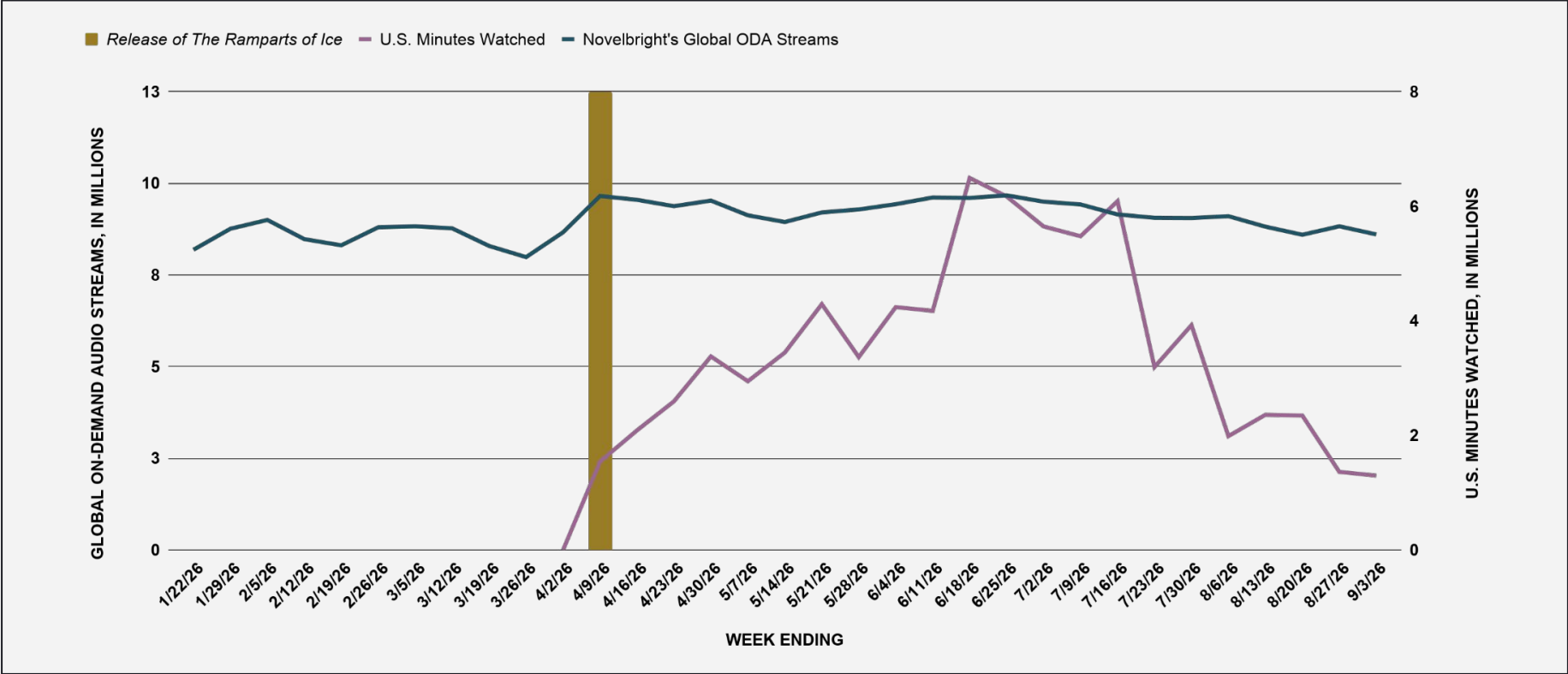
RANK	TITLE	MINUTES WATCHED	RELEASE DATE	PLATFORM AVAILABILITY
1	<i>Baki-Dou: The Invincible Samurai</i>	412.8M	2/26/26	Netflix
2	<i>Love Through a Prism</i>	103.1M	1/15/26	Netflix
3	<i>The Ramparts of Ice</i>	50.4M	4/3/26	Netflix
4	<i>Fist of the North Star: Hokuto no Ken</i>	41.3M	4/10/26	Prime Video
5	<i>Rooster Fighter</i>	39.4M	3/15/26	Adult Swim, Apple TV Store, Fandango, Hulu, Prime Video
6	<i>The Darwin Incident</i>	39.2M	1/6/26	Prime Video
7	<i>Nippon Sangoku: The Three Nations of the Crimson Sun</i>	36.7M	4/5/26	Prime Video
8	<i>Steel Ball Run: JoJo's Bizarre Adventure</i>	27.1M	3/19/26	Netflix
9	<i>Kill Blue</i>	20.3M	4/11/26	Netflix, Plex, Prime Video
10	<i>Dandelion</i>	17.3M	4/16/26	Netflix

SHARE OF U.S. ANIME STREAMING BY PLATFORM
Minutes Watched, Released in 2026



Transmedia Syncs Deliver Multi-Month Global Streaming Halos for Asian Artists

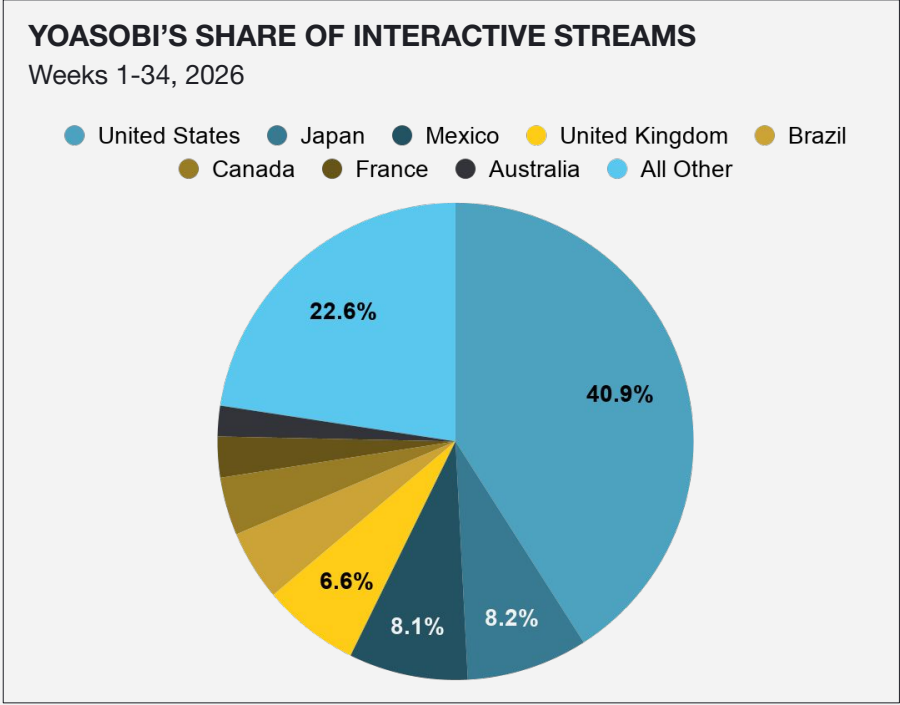
Novelbright saw a 19-week sustained surge in global audio streams following the premiere of *The Ramparts of Ice* on Netflix.



USA Interactive Gaming Ecosystems Bridge Asian Music to Western Gen Z Audiences

Interactive gaming platforms (e.g., Fortnite Festival) drive 40.9% of YOASOBI’s interactive streams from the United States, placing them alongside top global acts like Lady Gaga and Sabrina Carpenter. Interactive On-Demand streams are from gaming platforms that allow users to choose their own music and engage with songs as part of the experience (e.g. Fortnite Festival).

TOP ARTISTS RANKED BY INTERACTIVE STREAMS		
Global Interactive Streams. Weeks 1-34, 2026		
RANK	ARTIST	INTERACTIVE STREAMS
1	Lady Gaga	8.4M
2	Metallica	7.9M
3	Sabrina Carpenter	6.0M
4	Bruno Mars	5.5M
5	Olivia Rodrigo	5.2M
6	Juice WRLD	4.8M
7	Linkin Park	4.6M
8	YOASOBI	4.3M
9	The Weeknd	4.0M
10	Green Day	3.9M



Takeaways

VOLUME LEADERSHIP & MONETIZATION RUNWAY

APAC is driving global audio growth (+10-24% across key markets). Closing the conversion gap in emerging territories like India and SE Asia represents the industry's single largest commercial opportunity.

THE ASIAN EXPORT ENGINE

APAC markets are advancing rapidly in global export rankings (#3 South Korea, #12 Japan, #13 India). Latin America and the US continue as high-growth non-APAC consumption hubs.

TRANSMEDIA & FANDOM BLUEPRINTS

Screen tie-ins (Anime/Film) drive immediate streaming conversion, while K-Pop's physical collectible model in Western mass retail provides a repeatable monetization blueprint for all Asian rights holders.

OFFLINE-TO-DIGITAL PAYWALL TRIGGERS

Converting ad-supported users across select Asia countries requires lifestyle understanding—targeting live music attendees (+67%) and physical buyers (+41%) with bundled premium offerings.

Bonus Preview - AI Music Begins Taking Commercial Root Across Asian Digital DSPs

Early adoption in major Asian markets highlights human-led AI assistance, though relatively few individual AI songs have large scale impact yet

TOP 5 AI-ASSISTED AND/OR GENERATED TRACKS, RANKED BY JAPAN ON-DEMAND STREAMS, WEEKS 1-26, 2026

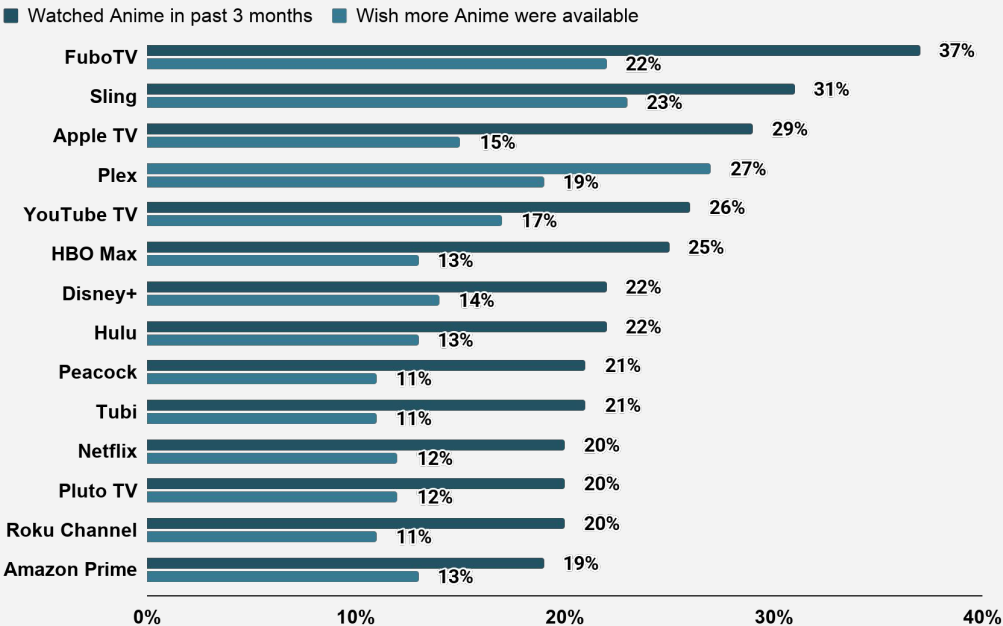
Rank	Title	Artist	On-Demand Streams	Release Date
1	GG EZ	M.Sasuke	3,850,000	2026-05-26
2	Love	Kaive Noir	780,000	2026-05-12
3	Papaoutai (Afro Soul)	Chill77, Unjaps	670,000	2025-12-19
4	Text Me	Kaive Noir	530,000	2026-05-12
5	Girlfriend	Kaive Noir	380,000	2026-05-11

Bonus: SVOD Audiences Offer High-Margin Physical Collectibles Among Western Gen Z

26% of U.S. Gen Z CD buyers discover new music via Anime—3.25x the rate of the average music listener.

ANIME VIEWERSHIP (U.S.)

Among SVOD Users (read as: “37% of FuboTV users watch anime”)



Top 5 SVODs Among Anime Viewers

#1 Netflix

#2 Amazon Prime

#3 Hulu

#4 Disney+

#5 HBO Max

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