

2022

# Power of LGBTQ+ Music

**LUMINATE**

**billboard**

Queer  
Capita

# Introduction

It has been a long journey towards representation (let alone equality) for the LGBTQ+ community in the United States, and I think most of us in the community would agree that there is still quite a ways to go. Some states are going so far as to dictate if and when you can even say the word “gay,” not to mention the near constant attacks on the rights of the Trans and Non-Binary community by regressive lawmakers.

But if there’s one positive thing we’ve seen over the past decade, it’s the resilience and strength of our LGBTQ+ community and the ability of highly visible queer individuals to change hearts and minds by telling their stories. And this couldn’t be more true than it is in music.

Luminate is thrilled to announce the first in a series of spotlights on underrepresented communities, The Power of LGBTQ+ Music report. In collaboration with our partners at Billboard and Queer Capita, we want to shine a light on the influence, success, and importance of the queer community within the music industry: as artists, fans, and professionals. It is through visibility and representation — yes, even in research — that the LGBTQ+ community will continue our progress to full equity.

As you’ll see in the following report, queer music fans are exceptionally valuable to the industry — spending disproportionate amounts of time and money on the music we care about. We shape trends. We create trends. And in the case of queer artists, we are the trend.



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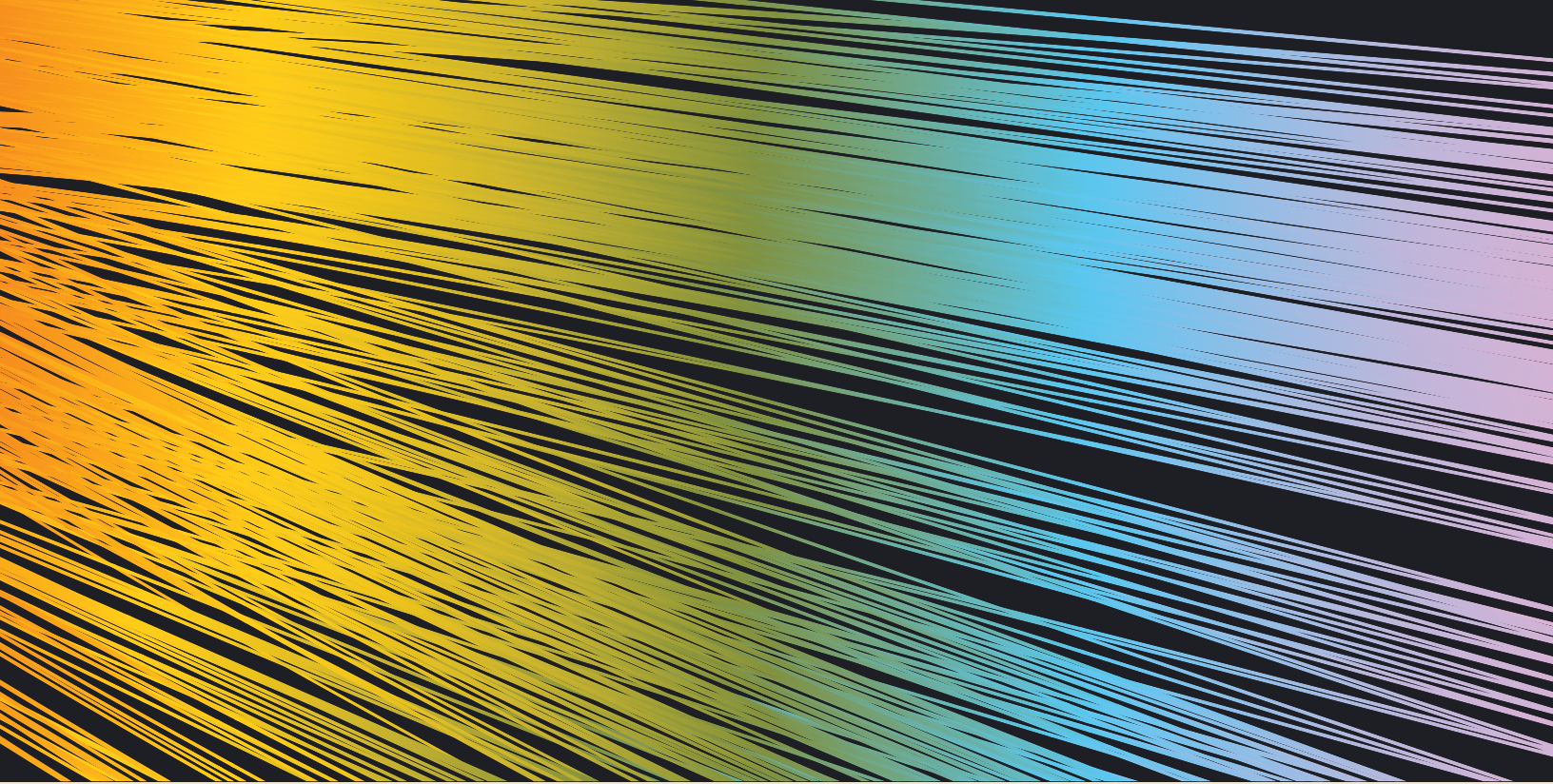
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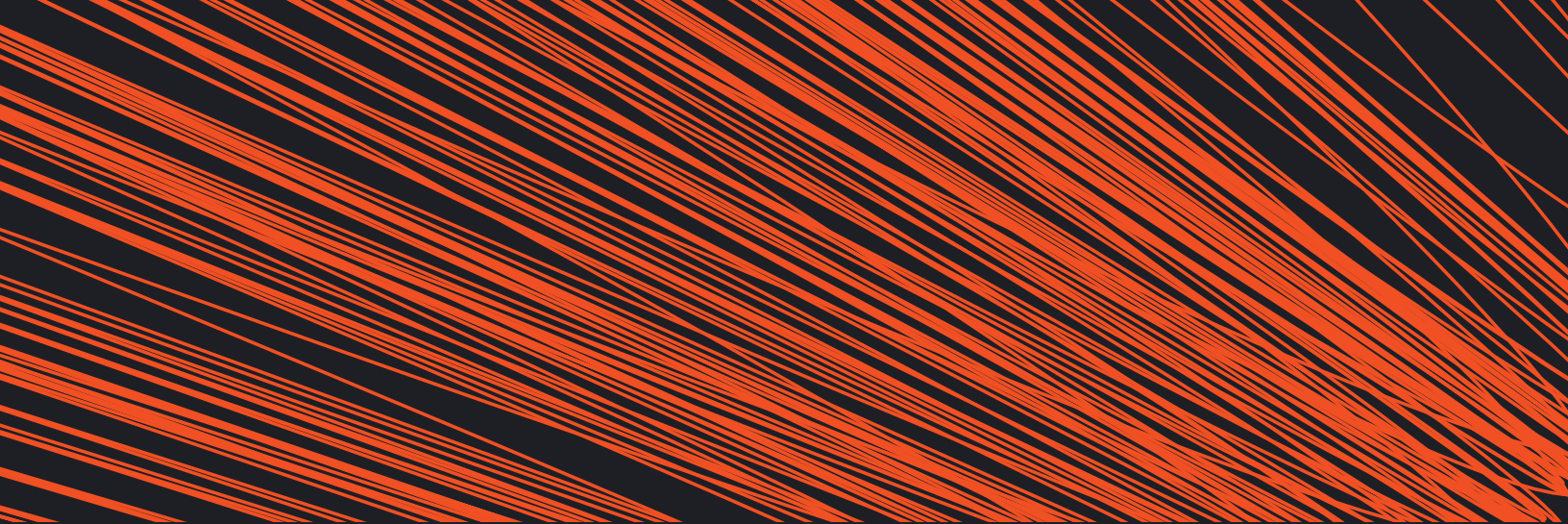
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PART 1

# LGBTQ+ Audiences Are Valuable

Despite the way some companies run their businesses, the LGBTQ+ community's spending power isn't only valuable one month out of the year. In fact, data shows that throughout the year, queer music fans are significantly more likely than the general public to put their money where their mouth is.

While in decades past LGBTQ+ audiences may have been looked at as a fringe demographic within the larger context of the music industry, data shows that today, queer and trans audiences are more likely to spend their dollars on music — buying physical albums, artist merch, concert tickets and more — at a higher rate than other averages would suggest.

## FOLLOW THE MONEY

# 18%

LGBTQ+ fans spend an average of 18% more on artist merch than the general public

# \$72

LGBTQ+ listeners spend an average of \$72 more per year on music than the average music listener

## Money On Their Minds

When it comes to using paid streaming services, LGBTQ+ consumers perform just slightly above national averages by 4% per month. But, when taking into account the various other methods by which consumers use their wallets to support their favorite artists, queer listeners routinely outspend audiences at large. LGBTQ respondents were 12% more likely to try a product endorsed by an artist they follow, and report spending 6% more than the general population on live music events — a spend that increases to 15% more on concerts specifically.

But it's not only live events and endorsements where queer fans outpace the general public. Data shows that LGBTQ+ consumers are 20% more likely than the general population to purchase merchandise — like T-shirts, stickers, posters and more — from their favorite artists.



### True or False? LGBTQ+ audiences are more likely to buy CDs than others.

**False.** While LGBTQ+ respondents proved to be more invested in owning physical copies of the music they listen to, they remained in line with national trends in terms of listening to CDs — 34% of both LGBTQ+ listeners and overall listeners reported CDs as part of their monthly music consumption.



# Let's Get Physical (Copies)

Still, with only mild gains over national averages in streaming, the question remains — how are queer audiences regularly spending more on music each month than their straight counterparts? The answer? Physical sales. LGBTQ+ listeners consistently spend more money and time with vinyl LPs than the greater listening public, spending 27% more than the general population on music purchases, and being 31% more likely to use vinyl records in a given month than the average music listener.

“This data reveals the remarkable influence that LGBTQ+ consumers wield in the music business, especially when it comes to vinyl sales,” says Hannah Karp, editorial director of Billboard. “LGBTQ+ individuals listen to music on vinyl 24% more than the overall consumer, with LGBTQ+ members of Gen Z listening to 78% more music on vinyl each month, no doubt fueling the boom that led to one in every three albums sold in the U.S. last year being a vinyl LP. There is so much more to learn about the power of this community through studies like these.”

## Free Fallin'

It's worth noting that while LGBTQ+ consumers are spending more of their money on music, free alternatives are still the most popular method of listening for the community. 84% of LGBTQ+ respondents reported using free versions of streaming services to listen to music on a monthly basis, while 69% of those respondents also reported streaming music videos every month, up 10% from the national average.

### GENERATIONAL GAPS

■ LGBTQ+ Millennial ■ LGBTQ+ Gen Z

#### Average Amount Spent Monthly on Music



#### Average Hours Spent Monthly Listening to Music



#### Average Amount Spent Monthly on Physical Copies





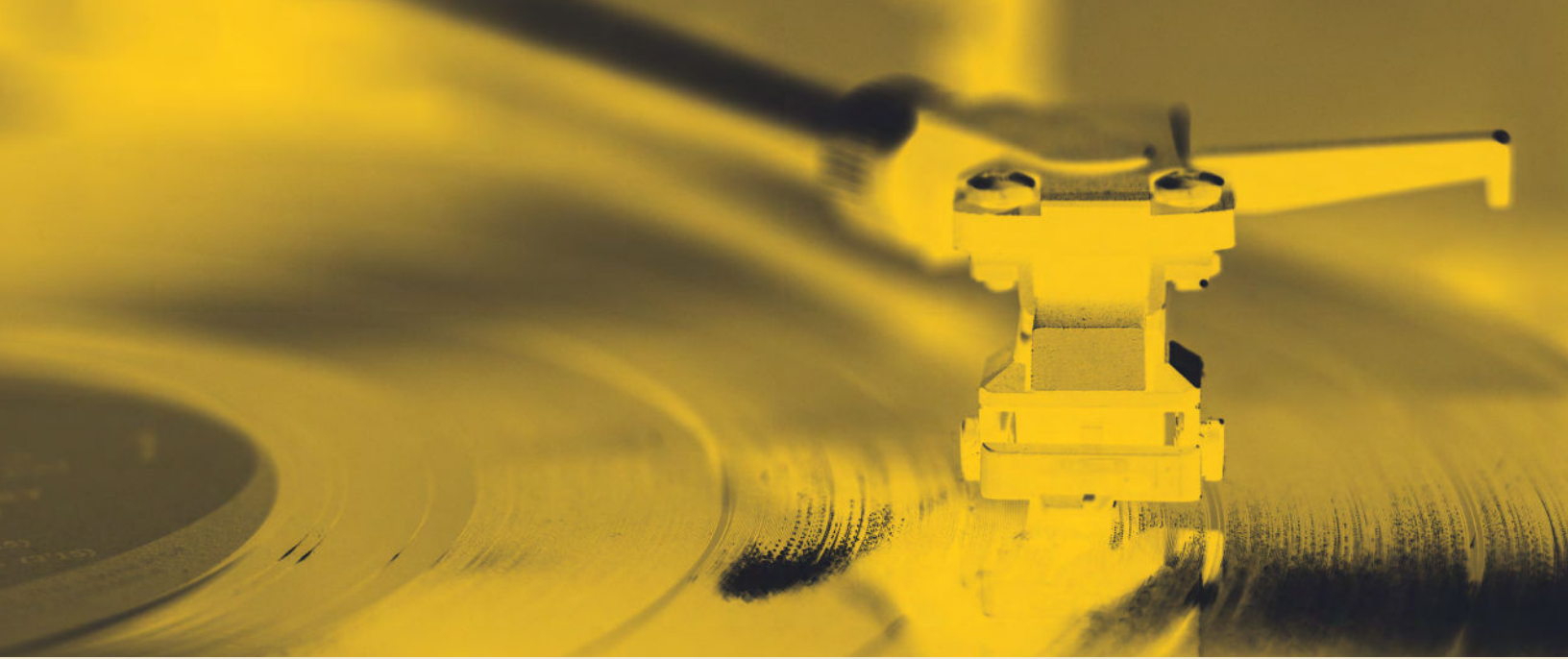


PART 2

# LGBTQ+ Audiences Are Influencers

LGBTQ+ influencers will be the first to tell you they're cultural trendsetters, but you don't have to take their word for it. For decades, data has shown that LGBTQ+ consumers are early adopters of technology that was once niche but is now ubiquitous, from social media to mobile phones to the Internet itself.

The queer consumer influence is felt in music, too, with LGBTQ+ folks over-indexing when it comes to consumption of vinyl and video content, pushing artists, songs and genres to prominence. But it's not just contemporary tunes that see a boost from queer culture: from *RuPaul's Drag Race* to TikTok, LGBTQ+ creatives are propelling catalog tracks to new streaming heights as well.



# Vinyl, Video and Value

Whether recent converts to vinyl are seeking warmer audio quality or relishing the physical format's visual appeal, the resurgence is real. And thanks to LGBTQ+ consumers, wax's comeback shows no signs of waning, with Gen Z's LGBTQ+ community being 78% more likely to listen to vinyl in a typical month. Of course, newer venues of music consumption are benefitting, too: LGBTQ+ music fans are 10% more likely to stream music videos than the general population and are 27% more likely to discover music via short video clips on websites or apps. They're more engaged, too, watching more musician-created video content and over-indexing on YouTube.

# 78%

Gen Z's LGBTQ+ community is 78% more likely to listen to vinyl in a typical month



For decades, LGBTQ+ artists have made groundbreaking contributions to music and their music videos have provided the community with increased visibility and representation. [These] artists are not just ambassadors for their community; they are exemplary leaders with unparalleled cultural influence, embedded in the cultural zeitgeist, with reach spanning beyond the LGBTQ+ community. Their influence will only grow deeper with Gen Z fans, the most diverse generation to date, who want to see artists and stories that reflect the world around them.

— Laura Vanison, Vevo, senior director of consumer & artist insights

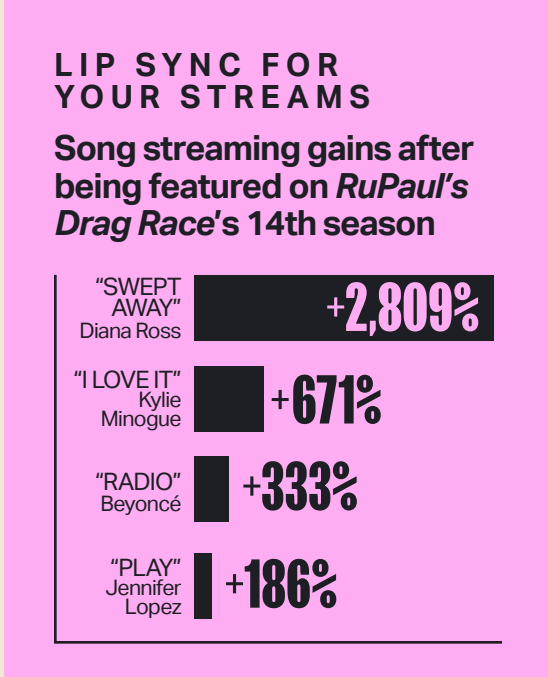




RuPaul's  
Drag Race

# 'Race' for the Prize

No artist should rue the day their song ends up on *RuPaul's Drag Race*. At the end of each episode, two drag queens face off in a lip sync showdown, and the victorious contestant isn't the only winner: Songs featured in *Drag Race* lip syncs see an impressive 138% increase in streaming the week after the show airs, on average. With episodes of the series on multiple streaming platforms and the lip sync segments officially on YouTube, the gains can be gargantuan: In 2022 alone, Diana Ross' "Swept Away" and Kylie Minogue's "I Love It" each soared by approximately 100k streams week-over-week thanks to *Drag Race*.

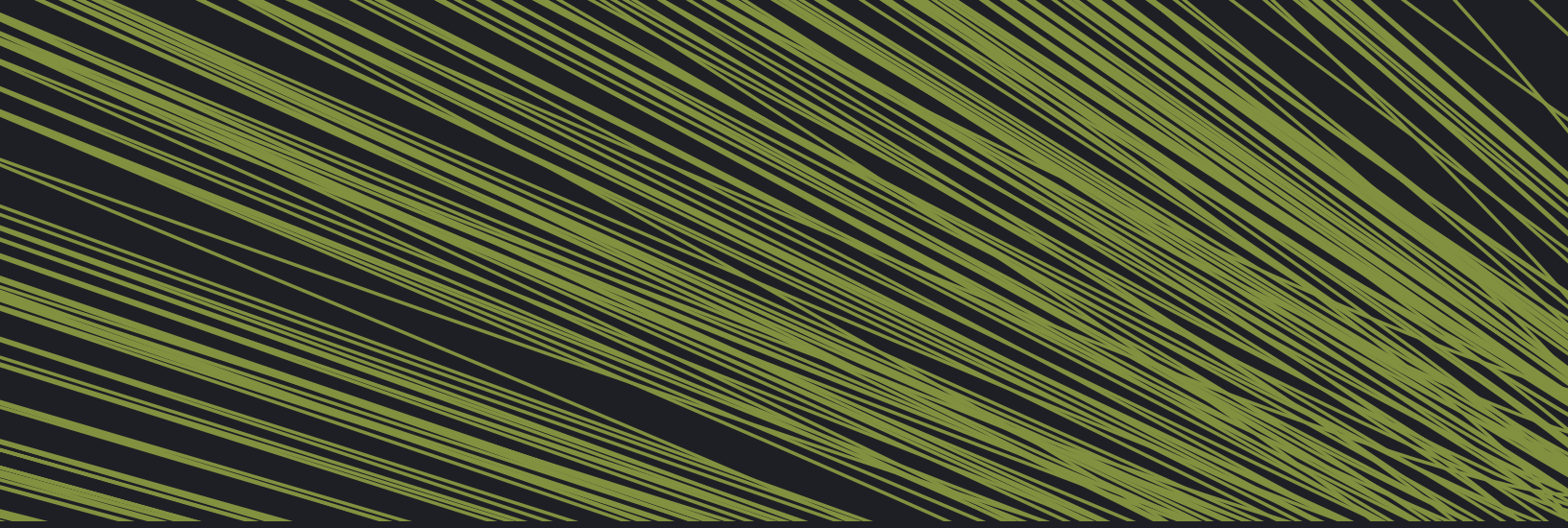


# Everybody Toks

You don't need to work on an Emmy-winning reality show to be a queer influencer who sets musical trends, though. In the last couple years, TikTok — a platform that LGBTQ+ people are 27% more likely to be a part of — has proven its value as a training ground for would-be chart hits and a surprising place for catalog songs to find a second wind. In fall of 2020, non-binary and gender nonconforming TikTok users dusted off the 2009 single "Hayloft" from Canadian indie rock band Mother Mother, propelling it to viral success beyond the LGBTQ+ TikTok community and giving the song new life in the process: Even after the viral moment subsided, U.S. on-demand streams of "Hayloft" continue to remain well above the 1 million mark each week; prior to its TikTok rediscovery, "Hayloft" saw fewer than 100,000 weekly streams, per Luminate.



Mother  
Mother



PART 3

# LGBTQ+ Artists Are Valuable

It's no secret that audiences shape the kind of music that ultimately becomes successful in the industry. So, with LGBTQ+ audiences taking an active, influential role in listening to and buying music, how are their voices being represented in the music that they are listening to and buying? The answer is that rising tides raise all ships; as queer consumers occupy a stronger position in the music market, queer artists are similarly seeing gains throughout the industry.

Along with those gains, LGBTQ+ artists are pulling in more than simply LGBTQ+ listeners — data suggests that while queer listeners make up a significant percentage of many of the top queer artists' fanbases, the majority of their audiences and fans don't actually identify as LGBTQ+.

DID YOU KNOW ...

+15%

Are LGBTQ+ listeners more invested in finding the Next Big Thing? Queer respondents were 15% more interested than the general public in finding new or emerging artists to listen to.

## They're Here, They're Queer

Popularity and visibility for LGBTQ+ artists is undoubtedly on the rise, but how well represented are LGBTQ+ artists among the most popular of their peers? According to the data, not particularly well; within the top 100 artists ranked by total consumption in 2021, 5% identify as LGBTQ+, while of the top 1,000, that percentage drops down to 2%.

Amongst those percentages, though, a few LGBTQ+ artists stand out from the pack. When it comes to streaming, Tyler, the Creator takes the crown as the most popular LGBTQ+ artist currently working in the industry, with over 1.75 billion total streams, as well as 1.64 billion in audio-only streams in 2021 alone. In terms of video, however, Lil Nas X is far and away the most popular queer artist, raking in over 407 million video streams in 2021. Artists like Queen, Halsey, Frank Ocean and Miley Cyrus also broke the 1 billion mark in total streams through 2021.



### Oldies, But Goodies

While modern artists like Tyler, the Creator, Lil Nas X, Halsey and others continue to dominate when it comes to streaming, two older LGBTQ+ acts continue to consistently outperform younger artists: Queen and Elton John. The formerly Freddie Mercury-fronted band still sits atop 2021's total consumption data among LGBTQ+ acts, with 1.6 million units accounted for, while also consistently ranking somewhere in the top three amongst total streams, audio streams and video streams. John, similarly, is ranked No. 6 in total consumption among LGBTQ+ artists with over 956,000 units, while remaining in the top 10 for categories like total streams and audio streams.



J Balvin

# Fangirls, Gays & Theys

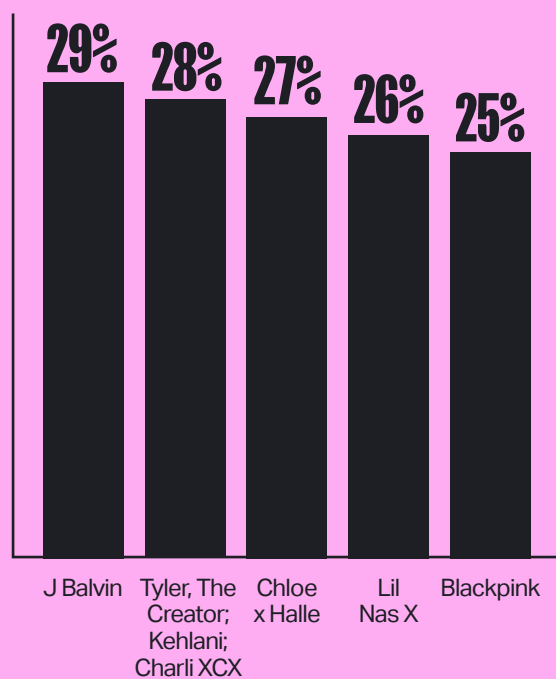
With representation among LGBTQ+ artists slowly rising within the industry, the question remains: are those same artists being listened to by LGBTQ+ audiences? The simple answer is yes, though with some surprising additions to who queer audiences are also listening to.

Top-rated LGBTQ+ artists have significantly correlated LGBTQ+ fanbases, including Tyler, the Creator and Kehlani, with both of their fanbases identifying as 28% LGBTQ+, Lil Nas X with a 26% LGBTQ+ fanbase, and Bebe Rexha and Halsey, both with 24% LGBTQ+ fanbases.

But, naturally, LGBTQ+ fans are not only interested in LGBTQ+ artists — a number of non-LGBTQ+ artists have also scooped up serious attention from the queer community. Of the data collected amongst a wide pool of artists from Luminate Research's Artist and Genre Tracker and US Music 360 study, J Balvin currently holds the highest-concentrated queer fanbase, with 29% identifying as LGBTQ+, while other non-LGBTQ+ acts like Charli XCX (28%), Chloe x Halle (27%), Blackpink (25%) and Lana Del Rey (25%) also maintain significant attention from queer audiences.

DID YOU KNOW ...

## Artists With the Largest Queer Audience





Charli  
XCX

## Pop-ing By

Among the growing list of genres available to the listening public, LGBTQ+ listeners are predominantly listening to rock and pop music on a weekly basis, with 46% of LGBTQ+ respondents saying they listen to rock music on a weekly basis, while 34% said they listen to pop on a weekly basis. However, LGBTQ+ listeners are notably more interested in pop and Top 40 music than their non-LGBTQ+ counterparts, seeing as they were 17% more likely than the average respondent to listen to pop music on a weekly basis, versus a smaller 5% more likely when it came to rock music.

That same trend can be seen amongst the artists with the largest LGBTQ+ fanbases, since approximately half of the 16 artists with the largest queer fanbases are pop singers. Among those artists, Charli XCX easily holds the highest-concentrated queer fanbase, with 28% of her fans identifying as LGBTQ+.

However, when it comes to her largely LGBTQ+ fanbase's active interest in what Charli XCX is up to, they actually underperform compared to the average fanbase. Charli XCX's fans are 22% less likely to tune in to a live television performance from her than averages for other artists would suggest, while also being 22% less likely to purchase concert tickets to one of her shows. LGBTQ+ listeners may be tuning into more pop music, but that's not always a guarantee the artist will see measurable gains.

**46%**

LGBTQ+ respondents say they listen to rock music on a weekly basis

**34%**

LGBTQ+ respondents say they listen to pop music on a weekly basis



PART 4

# LGBTQ+ Genre Landscape

From your gay grandzaddy following Dorothy down the Yellow Brick Road to LGBTQ+ millennials rallying to #FreeBritney, a lot has been made about the connection between queer audiences and pop divas over the years. And while the love is certainly there — LGBTQ+ listeners are 17% more likely to bump pop bops than overall listeners — hyper-fixating on that alone doesn't give an accurate picture of the demographic.

LGBTQ+ listeners aren't just propelling straight pop divas into the stratosphere, but LGBTQ+ artists as well — many of whom are making waves in genres beyond pop. Out rappers have never been so visible, while LGBTQ+-identifying women in R&B are better represented than ever before — and capturing nice slices of the streaming pie. Plus, a dazzling array of LGBTQ+ talent in Latin music is helping that realm continue its mainstream ascendance across festival lineups, streaming playlists and beyond.





Arlo Parks



Kehlani

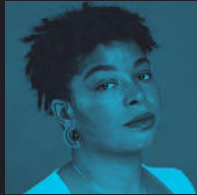
# (LG)R&B(TQ)

With LGBTQ+ respondents listening to 11% more R&B each week, it’s fitting that Kehlani, who recently came out as a lesbian and prefers she/they pronouns, was one of the 10 most-streamed LGBTQ+ artists last year. They’re just one of several out-and-proud female or nonbinary artists of color dominating R&B these days, from established stars like Janelle Monae to rising talent such as Arlo Parks. Kehlani in particular enjoys measurable support from the queer community, with 28% of Kehlani’s fanbase identifying as LGBTQ+ — and her fans are 7% more likely to purchase a ticket, 5% more likely to care about an endorsement and 60% more likely to follow Kehlani on socials.



LGBTQ+ audiences have really leaned into the careers of LGBTQ+ R&B acts over the last 10 years. The desire from millennial & Gen-Z LGBTQ+ listeners to consume more music that actually represents their relationships has encouraged more LGBTQ+ R&B acts in particular to openly express themselves. Many of us want content that reflects the love life we actually live, which is fueling LGBTQ+ R&B acts to be more direct in their lyrics about sex, love & queer relationships. Hearing queer Black women openly sing about their attraction and affection for women has made me understand myself better. LGBTQ+ audiences want to soundtrack their love lives like the rest of the world & R&B has become the go-to genre for that.

— Evangeline Elder, Senior Director, Music Brand Partnerships, Roc Nation

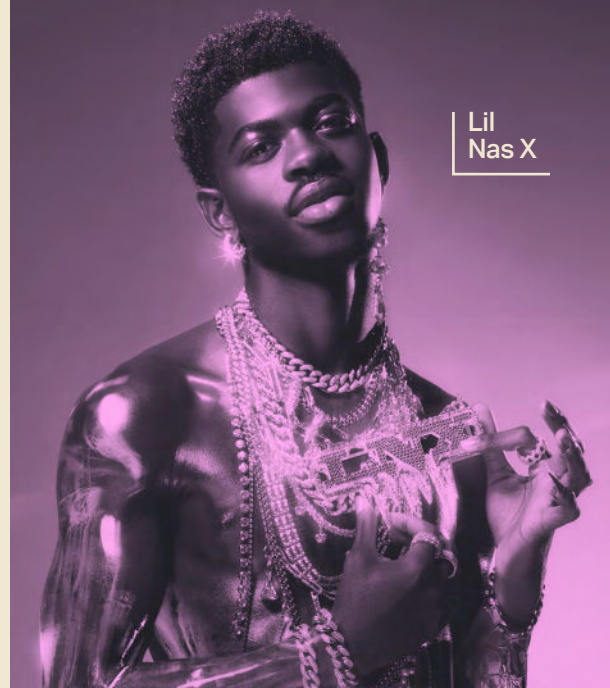




Chika

# Call Me By Your Rap Game

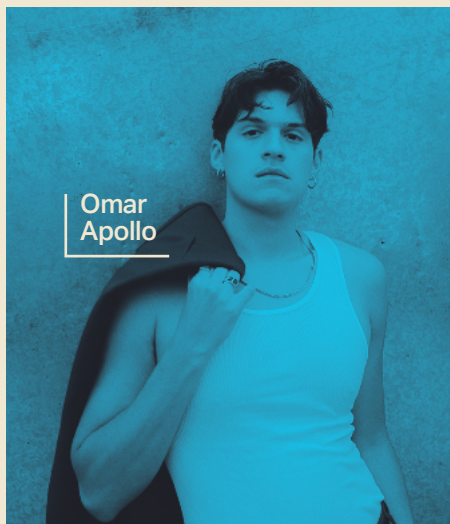
Hip-hop/R&B has been the dominant genre on Billboard’s charts since 2017, and sure enough, the top two artists with the biggest 2021 year-to-date streaming totals are rappers who have lyrically expressed (albeit to varying degrees) that they exist outside of heteronormative culture: Tyler, the Creator and Lil Nas X. Queer women are some of the hottest rising talents in the game, too, from Young M.A to Chika. But the queer community’s support for hip-hop is far from limited to rappers who identify as LGBTQ+: When it comes to the fanbases supporting Cardi B, Nicki Minaj, Megan Thee Stallion and Saweetie, nearly 1 in 4 identifies as LGBTQ+.



Lil Nas X

## DID YOU KNOW ...

### Lil Nas X Explained on Twitter Why He Hid His Nicki Minaj Fandom Before Coming Out:




Omar Apollo

## Mi LGBTQ+ Gente

Several of rising stars in Latin music are LGBTQ+, with the 2022 Coachella lineup spotlighting three in particular: Omar Apollo, Anitta and Pablo Vittar. But even before the Coachella look, Apollo enjoyed a remarkable 2021, earning 92 million year-to-date combined streams without even releasing an album. LGBTQ+ listeners count for significant portions of Latin hitmakers who aren’t queer, too: 29% of J Balvin’s fanbase is LGBTQ+, and Maluma — whose fanbase is 21% LGBTQ+ — has fans who are 29% more likely to buy a ticket to his shows.





PART 5

# LGBTQ+ Audiences Are Not A Monolith

So, what have we learned? Throughout this study, we've discussed the LGBTQ+ community as a whole, and the way that they've been quietly shaping how music is consumed in the modern era. But what tendencies do LGBTQ+ audiences have that deviate not only from the population at large, but within the community itself?

LGBTQ+ audiences are anything but stereotypical. They consistently break the mold and deviate from the trends set before them — and even within the community itself. While queer audiences tend to place a high value on an artist's activism, other preferences — such as physical music consumption — are far from set in stone across the community.





# Change for Good

As members of a community dealing with marginalization and discrimination on a regular basis, LGBTQ+ people tend to care more about the values being expressed by the people they follow online — naturally, that fact applies to artists as well. When asked whether they appreciate when an artist openly supports the social causes that they care about, LGBTQ+

respondents were 10% more likely than the general public to say “yes.” Taking it a step further, queer respondents were also 19% more likely to say that an artist’s opinions matter to them.



Iammateo

Daniel Iammateo and Nico Machlitt, co-founders of the LGBTQ+ professional networking organization Queer Capita, said that upholding a certain level of empathy and social-minded intention is a key factor in creating positive work environments within the music industry.



Machlitt

“Each Queer Capita partnership and event we produce is treated as an opportunity to reach and impact more Queer music industry professionals. Our members work in every aspect of the industry, which shows how powerful and present LGBTQ+ people truly are in the music industry and the need for a space like Queer Capita,” they said. “We consistently check in with our members to ensure we are delivering the initiatives and programs that they want to see happen. Outside of our members, we do have a Board of Directors. The board ranges from entry level to seasoned executives, this diverse group of individuals allows for a balance of expectations for the organization. At the end of the day, we’ve created this organization to ensure Queer professionals have a space to be supported and succeed.”

# +10%

LGBTQ+ respondents were 10% more likely than the general public to say “yes” when asked if they appreciate when an artist supports the social causes they care about

# +19%

LGBTQ+ respondents were 19% more likely than the general public to say an artist’s opinions matter to them

## DID YOU KNOW ...

# +78%

Data shows that LGBTQ+ Zoomers are 78% more likely than other Zoomers to listen to music on vinyl, and spend 88% more money per month on all physical music products.

## The Great (Generational) Divide

Much has been said elsewhere about the vast differences between Millennials and Zoomers (members of Generation Z), and that certainly remains true for LGBTQ+ members of both communities. But some data suggests that pre-established stereotypes of each group may not necessarily hold up to questioning among LGBTQ+ listeners.

Take, for example, the vast differences we discovered between the ways that LGBTQ+ Millennials and Zoomers listen to music — certain understandings about how Millennials and Zoomers generally look at the music market hold up. Per month, LGBTQ+ Millennials spend more money on music than LGBTQ+ Zoomers (\$146 vs. \$136), while queer Zoomers more often report listening to music using streaming services monthly than queer Millennials (88% vs. 77%).

But some data pointed to trends amongst these groups that deviate from stereotypes. For example, LGBTQ+ Zoomers, on average, spend more per month on physical copies of their favorite music than LGBTQ+ Millennials (\$15 vs. \$10), while more queer Millennials report streaming music via music videos monthly than their Zoomer counterparts (80% vs. 74%).



### Zoomers Consume, Vinyl Booms

As the pandemic drove people into their homes, many began seeking new ways to listen to their favorite music. One such method — buying and listening to vinyl records — continued to increase in popularity over the course of 2020 and 2021. The vinyl boom became so large that one out of every three albums bought in the U.S. in 2021 was purchased on vinyl, a 30-year high for the medium. As Gen Z continues to show a growing interest in owning vinyl copies of their favorite albums, it's important to note who among the burgeoning generation are leading the charge — queer Zoomers.

## About Luminate

Luminate is the entertainment and music industry's most trusted source of independent, objective and foundational data. Exemplifying transparency, clarity and fair access to information, Luminate's analysis, insights and relationships generate the most comprehensive, representative and relevant findings that empower informed decision-making and guide entertainment's thriving future.

## About Billboard

Billboard is a global music media brand, with a renowned authority among artists, fans and the industry. Billboard powers the ultimate global music destination and magazine, featuring unrivaled reporting on music news, issues and trends, the industry's definitive charts, encompassing the most complete and well-respected database of charts across all music genres. Billboard also produces elite conferences and events which regularly convene the industry and consumers around important conversations — from the annual Power 100 to Women in Music to Pride Summit, Latin Music Week and more.

## About Queer Capita

Queer Capita is a professional networking and community organization for Queer professionals actively working in the music industry. Founded in 2021 by Queer professionals. Queer Capita's mission is to unite the Queer workforce in music, expand the collective impact of our members through effective partnerships, create new pathways for Queer students and aspiring professionals to work in the music industry, and to advocate for the career growth and advancement of our members. Queer Capita achieves these goals through professional development workshops, member events, and unique mentorship opportunities. Queer Capita strives to help shape the music industry into one where Queer professionals can not only work but thrive.

