LUMINATE

MIDYEAR MUSIC REPORT

LUMINATE MIDYEAR MUSIC REPORT / 2025

— 2025

FUERZA REGIDA
CREDIT: CHRISTOPHER POLK

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LUMINATE MIDYEAR MUSIC REPORT 2025

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SABRINA CARPENTER
CREDIT: THEA TRAFF

INTRODUCTION

Midway through 2025, our focus at Luminate remains squarely on the intersection of growth and disruption within the music industry. Undoubtedly, the past six months have already delivered an abundance of both. From Los Angeles to Tokyo, New York to London and everywhere the music industry operates, two questions consistently emerge: Where is the next wave of growth coming from, and is AI an enabler or a disruptor in this evolving landscape? Our *2025 Midyear Music Report* directly addresses the first question and sets the stage for a deeper exploration of the second.

Luminate's operational scope has expanded dramatically in just four years. Following extensive investment, our technology now processes over 30 trillion data points across more than 200 million recordings, spanning more than 60 markets and, in some cases, analyzing data that extends back beyond three decades. In an industry increasingly driven by data and constantly seeking to understand future trends, Luminate provides an unparalleled solution for our global customers and partners. As AI technologies become more deeply integrated into every facet of our lives and businesses, accurate and actionable data stands as the crucial differentiator for any business aiming to navigate this complex future.

With an industry narrative of slowing growth in streaming, our data confirms a deceleration in growth for both U.S. and Global On-Demand Audio streaming. U.S. streaming grew by 5% and global streaming by 10%, compared to 8% and 15% respectively in 2024. However, our *Midyear Music Report* identifies numerous opportunities for continued diversification and growth across the industry. For example, the evolving interplay of generations, genres and growth is clearly demonstrated by the resurgence of the Christian/Gospel genre. This multifaceted trend is fueled by its artistic evolution, enhanced accessibility through digital platforms, influence of modern worship movements, rise of powerful subgenres such as Christian Hip-Hop and a growing consumer demand for authentic content.

In 2022, Luminate significantly expanded its global music coverage to 48 countries, a number that is now over 60 with the recent addition of key markets across the Middle East, North Africa and Sub-Saharan Africa. Our bet that music would become more global than ever in 2025 is validated through our Export Power Rankings. Comparing rapidly expanding markets such as the Middle East and Africa with Latin America, the data highlights distinct regional trends. Nigeria and Brazil show strong local consumption, with 61% and 75% of streams, respectively, originating from local artists. Conversely, Ghana and Bolivia are most receptive to regional imports in their area, at 25% and 65%, respectively, while markets including the UAE and Peru see a significant portion of their streams (92% and 36%) from artists outside their region.

In 2025, Luminate further extended its coverage to include musical activity within gaming environments, initially launching with Epic Games. The music industry has long identified gaming as a significant growth opportunity, and the sector is eager to highlight its importance to artists and labels. Luminate is uniquely positioned to narrate this trend, and we look forward to collaborating with more gaming partners in the coming quarters.

ROB JONAS / CEO LUMINATE

As the integration of Luminate's data across music, film and television continues, we are uncovering more and more examples of transmedia impact. The transmedia opportunity represents the strategic advantage of telling a unified story, or brand building, across multiple distinct media platforms, with each uniquely contributing to the overall narrative experience. Among the many instances observed in 2025, Led Zeppelin and LISA stand out. The documentary *Becoming Led Zeppelin*, streaming on Netflix, emerged as the year's top music documentary so far, driving a sustained 23% increase in the band's streaming over four months. Similarly, Thai artist LISA recently starred as Mook in Season 3 of HBO's *The White Lotus*. The show's release coincided with LISA's *Alter Ego* album launch, introducing her to new audiences as her TV role attracted fans to the series, particularly those interested in travel — a central theme of *The White Lotus*.

Finally, we turn to AI. Luminate data indicates that one in three U.S. music listeners express being "somewhat" or "very" comfortable with the use of generative AI to create song instrumentals, with younger audiences showing even higher comfort levels. While 44% report discomfort with generative AI creating new original songs performed by an AI voice, listeners of certain genres, such as EDM and K-pop, are notably more open to this practice. Currently, the emergence of artists including The Velvet Sundown and Aventhis marks a pivotal and inherently controversial moment in the long history of technology's influence on music. Unlike previous technological advancements that primarily augmented human artistry or transformed distribution, these acts appear to be fundamentally AI generated, directly challenging the very definition of artistry itself. The historical trajectory of technology in music has predominantly been a narrative of amplification and accessibility, from recording devices preserving sound to digital audio workstations empowering creators and democratizing listening.

However, the significant streaming activity of artists such as The Velvet Sundown and Aventhis signifies a new frontier where technology transcends its role as a mere tool to become a direct competitor. Their very presence challenges existing economic models, legal frameworks and the foundational definitions of artistry within the music industry. Their rise necessitates a critical examination of ownership, compensation, authenticity and the future of human creativity in an increasingly AI-driven world. And the ongoing debate surrounding them encompasses both the rapidly improving quality of their music and also the profound existential and economic questions they pose for human artists. Look to Luminate in the coming months to provide more clarity on the scale and impact of AI-generated music on the industry.

We often say that Luminate delivers facts, not opinions. While some of the observations in this report lean into analysis, we appreciate you taking the time to review these insights. We're confident they'll prove valuable as you navigate the data-driven music industry in the months ahead.

Be sure to let us know.

REDEFINING ENTERTAINMENT INTELLIGENCE.

Luminate continues to deliver powerful, actionable data and insights across music, film and television. In the first half of 2025, we expanded our customer and partner ecosystem, released groundbreaking features and expanded our global footprint. Here's a snapshot of what we've done — and we can't wait for the second half of the year!

- Harnessed our partnership with Snowflake to deliver data and insights faster
- Launched in-game music consumption activity into our platform, unlocking a key music discovery channel for Gen Z and Gen Alpha
- Revealed country-level music activity in 13 additional countries in the Middle East and Africa, bringing our total to 60 countries, as well as provided a full global view
- Evolved the Luminate Index, measuring artists' star power for brand integrations or partnerships
- Expanded business in the Asia-Pacific region through market development partners KreatorsNetwork in South Korea and Billboard Japan
- Expanded API access, upgrading Music and debuting Streaming Viewership (M), unlocking deeper data access and analysis
- Introduced Audience Demographic Data in Streaming Viewership (M) to reveal age and gender breakdowns for top film and series titles on the major U.S. streaming platforms

Learn more about our data and solutions at luminatedata.com.

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.

IN THIS REPORT

LUMINATE MIDYEAR MUSIC REPORT 2025

DATE RANGE FOR CONSUMPTION DATA:
WEEKS 1-26 2025 VS. WEEKS 1-26 2024 (1/3/25 - 7/3/25 VS 12/29/23 - 6/27/24)

01

MIDYEAR METRICS

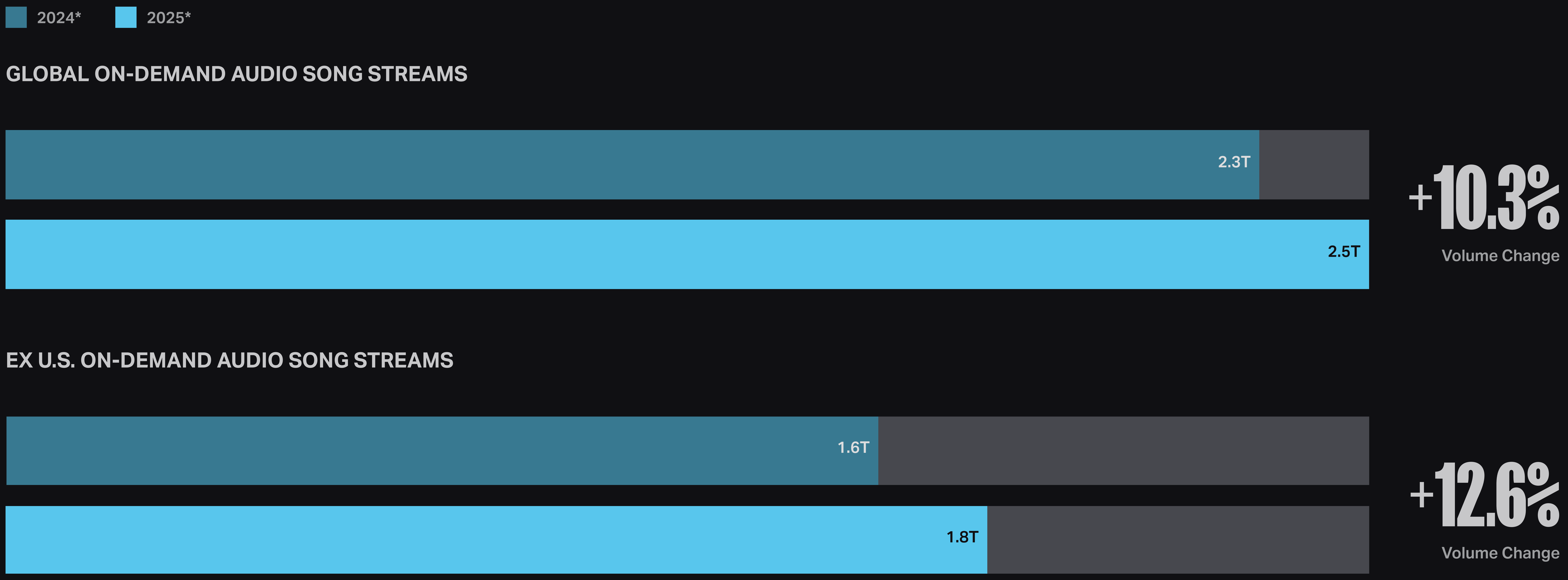
CONSUMPTION & SALES

DATE RANGE FOR CONSUMPTION DATA:
WEEKS 1-26 2025 VS. WEEKS 1-26 2024 (1/3/25-7/3/25 VS. 12/29/23-6/27/24)

LUMINATE MIDYEAR MUSIC REPORT 2025

KENDRICK LAMAR
CREDIT: CHRISTOPHER POLK

Global Metrics



*1/3/25 - 7/3/25 (AS COMPARED TO 12/29/23 - 6/27/24) / SOURCE: LUMINATE CONSUMPTION DATA

U.S. Metrics

2024* 2025*

U.S. TOTAL ALBUM CONSUMPTION⁺
(ALBUM + TEA + SEA ON-DEMAND AUDIO)**

+3.9%
Volume Change

ON-DEMAND STREAMING (AUDIO)

+4.6%
Volume Change

U.S. TOTAL DIGITAL MUSIC CONSUMPTION
(DIGITAL ALBUMS + TEA + SEA ON-DEMAND AUDIO)**

+4.4%
Volume Change

TOTAL ALBUM SALES⁺
(PHYSICAL + DIGITAL)

-6.0%
Volume Change

DIGITAL ALBUM SALES

-17.7%
Volume Change

PHYSICAL ALBUM SALES⁺
(LP, CD AND CASSETTE)

-3.2%
Volume Change

*1/3/25 - 7/3/25 (AS COMPARED TO 12/29/23 - 6/27/24)
** SEA (STREAM-EQUIVALENT ALBUMS): 1250 PREMIUM STREAMS = ONE ALBUM // 3750 AD-SUPPORTED STREAMS = ONE ALBUM; TEA (TRACK-EQUIVALENT ALBUMS): 10 DIGITAL TRACKS = ONE ALBUM
⁺U.S. PHYSICAL SALES METRICS INCLUDE MODELED INDEPENDENT RETAIL NUMBERS. SEE METHODOLOGY AND FAQ SECTION AT THE BACK OF THIS REPORT FOR MORE
SOURCE: LUMINATE CONSUMPTION DATA

Canada Metrics

2024* 2025*

CANADA TOTAL ALBUM CONSUMPTION
(ALBUM + TEA + SEA ON-DEMAND AUDIO)**

+4.5%
Volume Change

CANADA TOTAL ALBUM SALES
(PHYSICAL + DIGITAL)

-7.0%
Volume Change

CANADA ON-DEMAND STREAMING
(AUDIO)

+5.2%
Volume Change

CANADA TOTAL PHYSICAL ALBUM SALES
(LP, CD AND CASSETTE)

+1.0%
Volume Change

*1/3/25 - 7/3/25 (AS COMPARED TO 12/29/23 - 6/27/24)
** SEA (STREAM-EQUIVALENT ALBUMS): 1250 PREMIUM STREAMS = ONE ALBUM // 3750 AD-SUPPORTED STREAMS = ONE ALBUM; TEA (TRACK-EQUIVALENT ALBUMS): 10 DIGITAL TRACKS = ONE ALBUM
SOURCE: LUMINATE CONSUMPTION DATA

02

STREAMING ATLAS:

MAPPING MUSIC, FANS AND INFLUENCES WORLDWIDE

Streaming accounted for 92% of U.S. music consumption in early 2025, but a closer look reveals shifting genre dynamics and evolving audience behaviors. Luminate's data highlights these trends, helping to understand emerging audience behaviors and offering insights into the future of music consumption.

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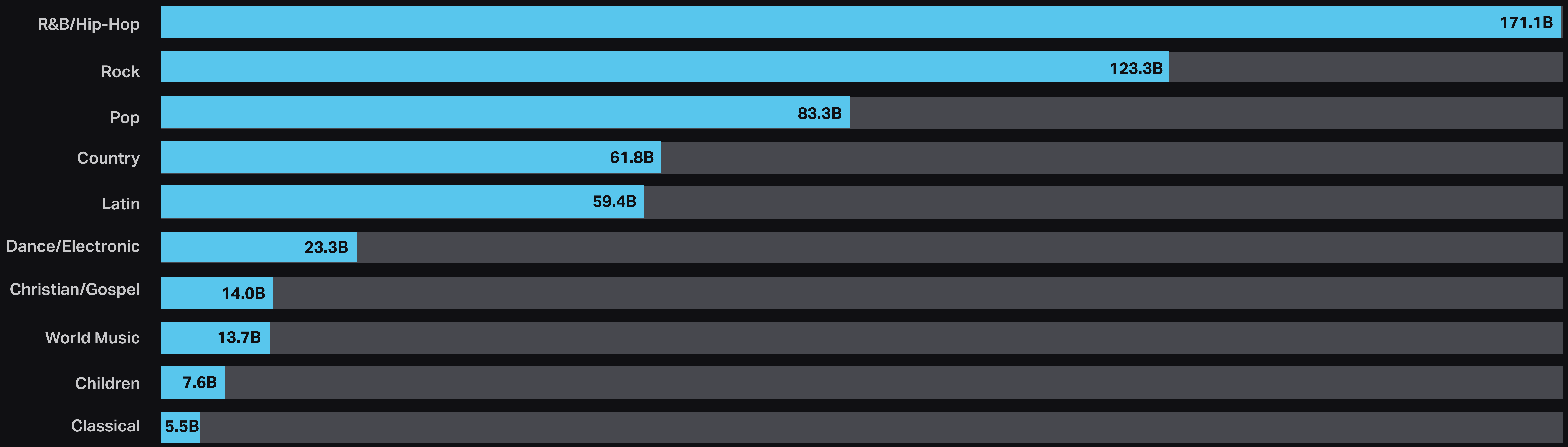
ARIANA GRANDE
CREDIT: RICH POLK

U.S. Core Genre Trends in 2025

While the top 10 U.S. core genres remain the same as in 2024, Christian/Gospel passes World Music to place 7th in On-Demand Audio (ODA) volume, while Rock leads in growth and the *Sinners* Original Motion Picture Soundtrack and the adjacent activity of featured artists helps drive Blues.

TOP 10 U.S. CORE GENRES

Ranked by U.S. On-Demand Audio streaming volume

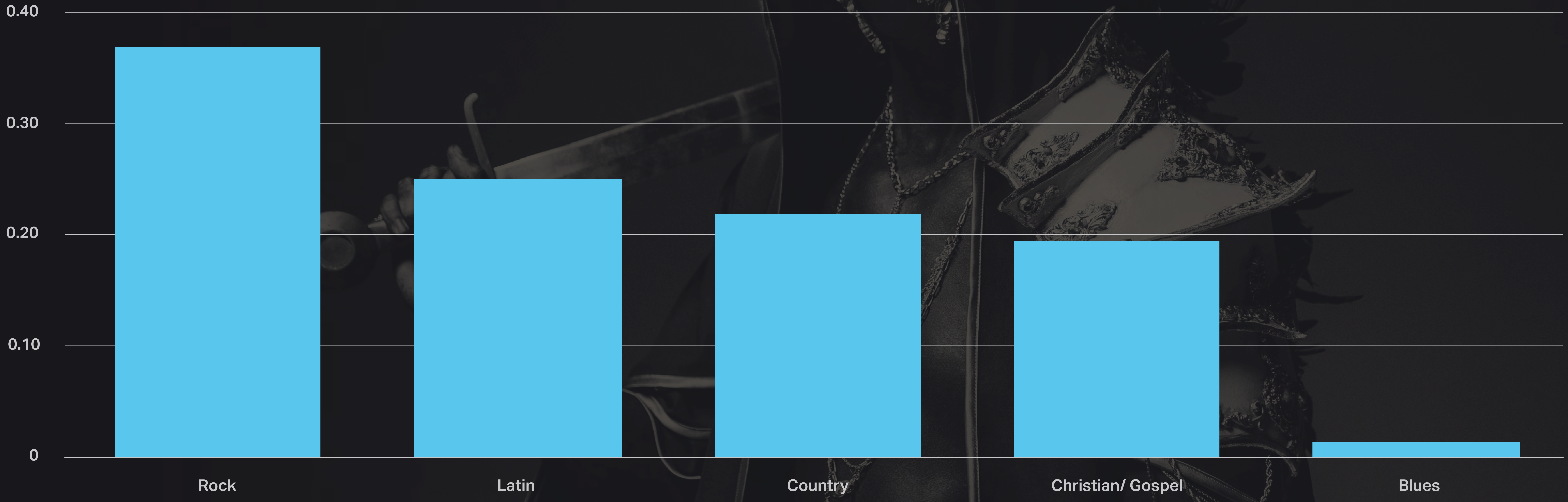


SOURCE: LUMINATE MUSIC CONSUMPTION DATA

HIGHEST-GROWTH GENRES IN U.S.

Ranked by On-Demand Audio sharepoint changes, H1 2025 vs. H1 2024

SLEEP TOKEN
CREDIT: ANDY FORD



SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Subgenre Trends in 2025

Alt Rock leads all subgenres in volume change, while Regional Mexican, R&B, Hard Rock and Christian round out the top 5 in growth.

U.S. ON-DEMAND AUDIO, SUBGENRE GROWTH

H1 2025 vs. H1 2024, ranked by volume change

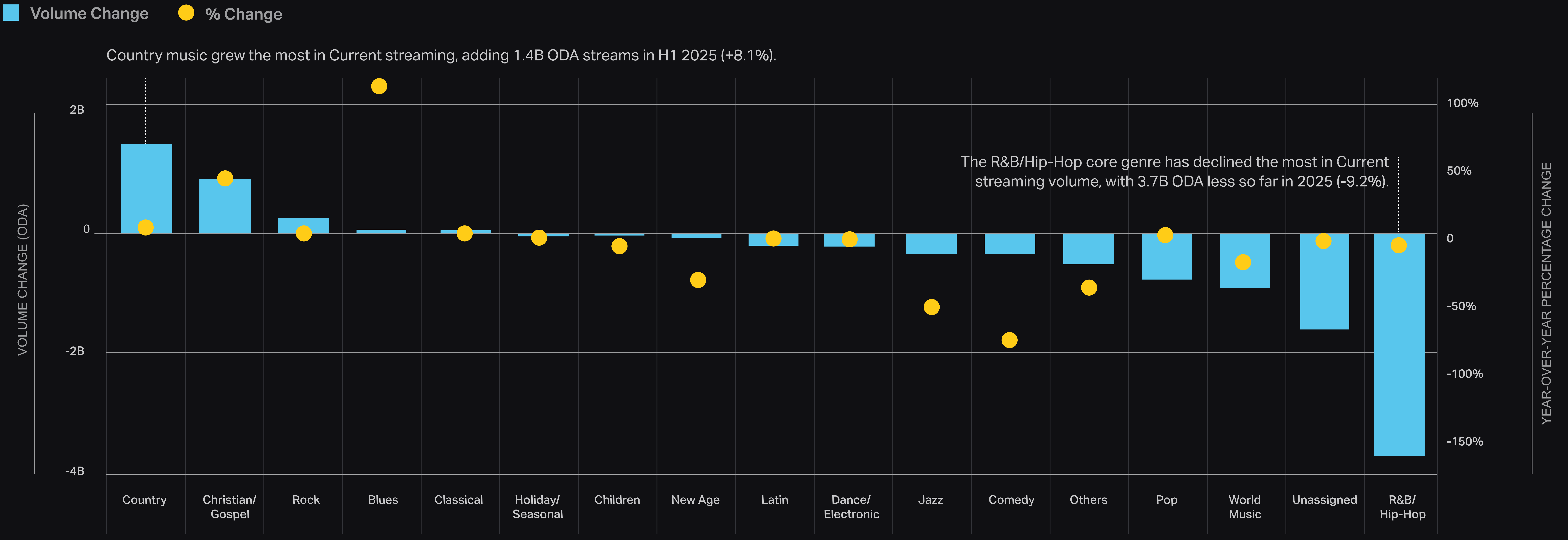
NOTE: ONE TRACK CAN HAVE MULTIPLE SUBGENRES / SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Current Music

When looking only at U.S. On-Demand Audio streaming of Current music (identified as tracks that are 18 months old or newer), this category declined 3.3% in volume compared with the first half of 2024 (168.5B vs. 174.3B).

U.S. CURRENT MUSIC (18 MONTHS OLD OR NEWER)

Core genre On-Demand Audio, H1 2025 vs. H1 2024



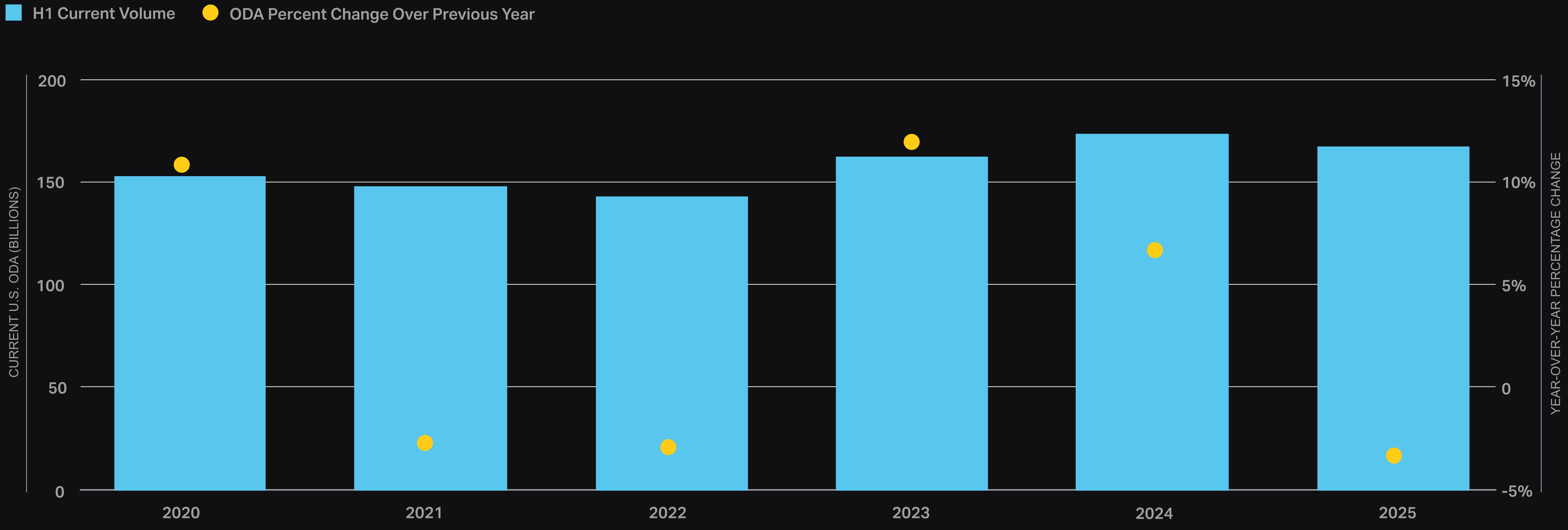
SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Current Music

However, this is not the first time a decline has been seen: As recently as 2022 and 2021, both first half-year totals posted less than the previous year. H1 2025 marks a two-year growth percentage of 3.4% over H1 2023.

U.S. ON-DEMAND AUDIO STREAMING

Current (18 months old or newer)



SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Listener Profiles: R&B, Hard Rock, Christian Music Streamers

Each of these subgenres has experienced growth in 2025. This is the first time in over three years that R&B has placed as a top 5 growth subgenre, while new album releases from Sleep Token and Ghost debuted at No. 1 on the Billboard 200 to help drive Hard Rock. Christian music, meanwhile, is rising due to a younger, streaming-forward listener.

R&B MUSIC STREAMER

Female (54%)

Top Generation: Gen Z (27%)

110% more likely to discover music via Twitch

Two out of 3 agree/strongly agree with the statement, "I like it when my favorite artists release songs outside their genre"

HARD ROCK MUSIC STREAMER

Male (69%)

Top Generation: Millennial (35%)

118% more likely to discover music via video games/video game portals

Twice as likely to listen to music on vinyl

CHRISTIAN MUSIC STREAMER

Female (60%)

Top Generation: Millennial (30%)

90% more likely to discover new music through playlists on streaming services

Three out of four agree/strongly agree with the statement, "I listen to songs on repeat"

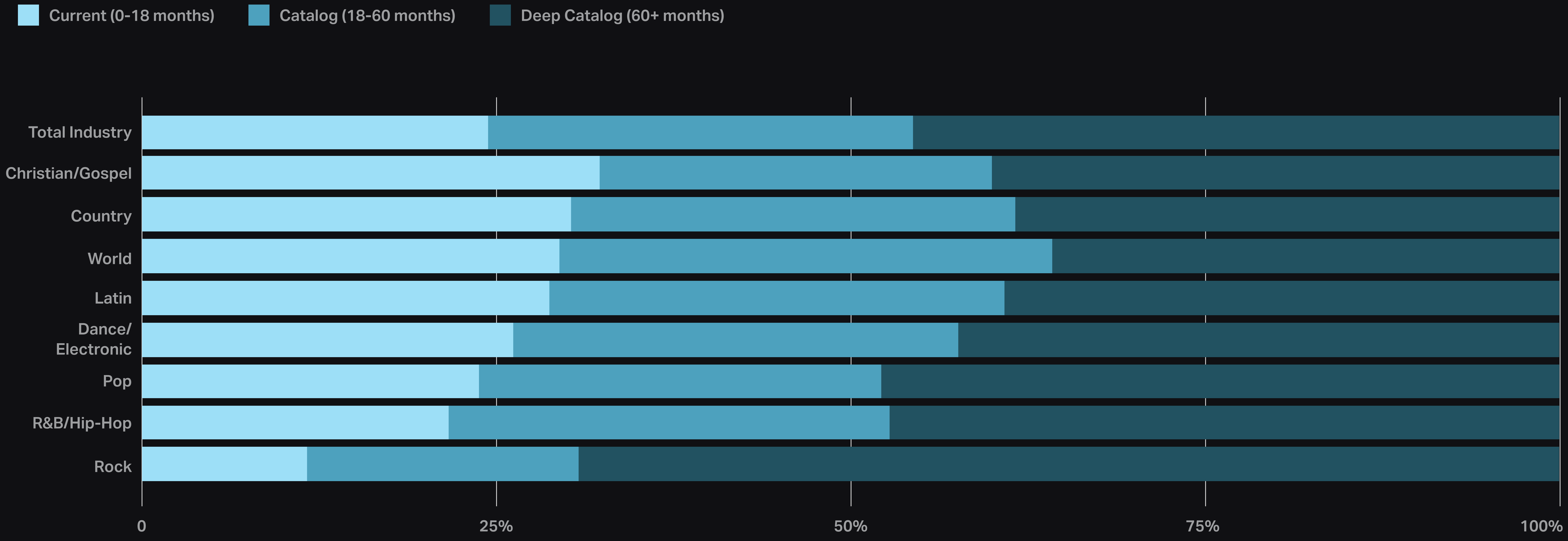
NOTE: COMPARED WITH AVERAGE U.S. MUSIC LISTENER / SOURCE: LUMINATE INSIGHTS ARTIST + GENRE TRACKER (U.S.)

Release Age Listening

Christian/Gospel streaming leans the most Current, at 33%; 35% of World Music streaming is from tracks 18-60 months old, while 69% of Rock streaming is from music older than 60 months.

U.S. ON-DEMAND AUDIO STREAMING IN 2025

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



SOURCE: LUMINATE MUSIC CONSUMPTION DATA

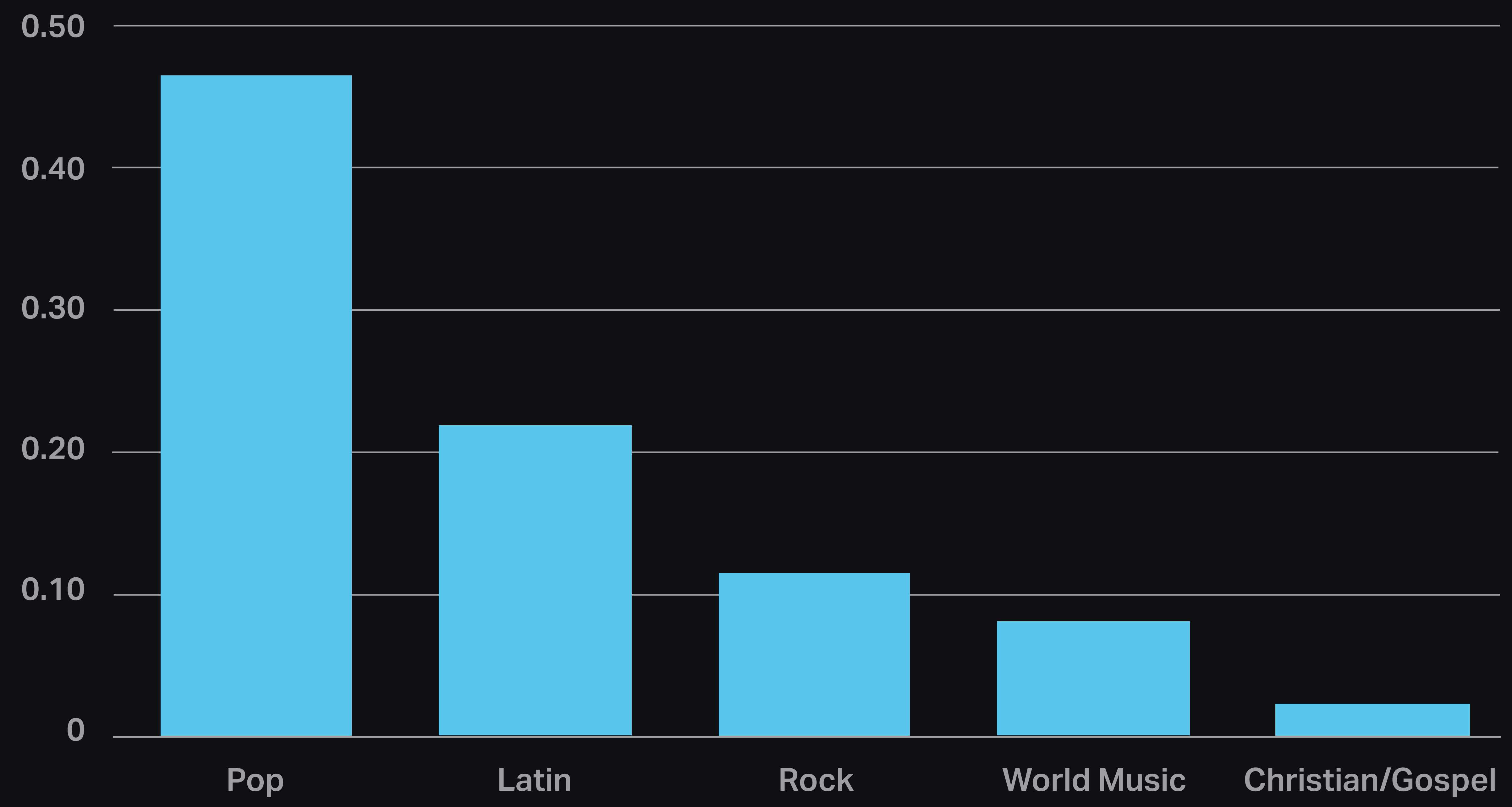
Recession Pop: It's Not Just the Vibe That's Back

New releases from artists such as Lady Gaga and Kesha fueled discussions of whether Recession Pop was back, but the data shows tracks released in the Great Recession era are also having a resurgence.

When analyzing the growth of U.S. tracks released in the Great Recession of 2007-12, Pop songs from those years grew 6.4% in On-Demand Audio volume in 2025, outpacing the U.S. industry's rate of 4.6%. The corresponding Pop share point increase of all tracks released 2007-12 is also more than 2x that of the next closest genre, showing 2025 audiences are gravitating to the Pop genre from this period.

HIGHEST-GROWTH GENRES OF TRACKS RELEASED 2007-12

H1 2025 vs. H1 2024, sharepoint change in U.S. On-Demand Audio streams



TOP POP SONGS IN 2025 RELEASED 2007-12

Ranked by U.S. On-Demand Audio streams

RANK	ARTIST	TITLE	ODA STREAMS
1	Bruno Mars	"Just the Way You Are" (2010)	91.9M
2	Miley Cyrus	"Party in the U.S.A." (2009)	87.0M
3	Lady Gaga	"Poker Face" (2008)	83.6M
4	Rihanna	"Breakin' Dishes" (2007)	81.4M
5	Rihanna	"Don't Stop the Music" (2007)	70.5M

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

03

IMPORT/ EXPORT:

NEW LINES OF TRADE

Luminate's most recent Year-End Music Report introduced the Export Power Rankings to highlight evolving trade relationships in the global music ecosystem. In the first half of 2025, these rankings are paired with regional analysis, identifying countries that stream the most local, regional and ex-regional artists — and offering key insights for business entering new markets as well as music audience signals on nativism.

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ROSÉ
CREDIT: GILBERT FLORES

Top 10 Countries in Global Export Power

As global digital service providers (DSPs) facilitate the spread of music across borders, there's an opportunity to increase a country's cultural impact through music in foreign territories as well as identify clusters and analyze music trade relationships.

Luminate Export Power Rankings evaluate a country's ability to export recorded music globally. This score is a combination of four data points: the rank of artists in each country based on Total On-Demand Streaming and Country of Origin; the number of countries importing music from a given export country; the streaming size of importing countries; and the number of artists per export country reaching international audiences.

HIGHLIGHTED ITEMS INDICATE CHANGES VS. FY 2024

00	Country	Top Importer 1	Top Importer 2	Top Importer 3	Top Artist Export
01	United States	Canada	Australia	New Zealand	Taylor Swift
02	United Kingdom	United States	Ireland	Australia	Coldplay
03	Canada	United States	United Kingdom	Australia	The Weeknd
04	South Korea	**Taiwan**	**Japan**	**Singapore**	Rosé
05	Germany	Austria	Switzerland	Slovakia	Rammstein
06	France	Belgium	Switzerland	Netherlands	David Guetta
07	Puerto Rico	United States	Mexico	Spain	Bad Bunny
08	Australia	United States	**Philippines**	**Canada**	Sia
09	**Brazil ↑**	Portugal	Bolivia	**Argentina**	Alok
10	**Sweden ↓**	United States	Norway	**United Kingdom**	Avicii

Import/Export: Country of Origin

An analysis of streaming share that is local, regional and ex-regional artists helps to identify countries that are importers and exporters throughout specific regions. This aids in understanding how music spreads globally, helps businesses identify relevant joint-venture relationships and answers such questions as which markets are the most insulated or native in their streaming behavior.

MIDDLE EAST AND AFRICA

Most Local

Nigeria

61.3% of On-Demand (Audio + Video) streams from a local Nigerian artist

Most Open to Import From the Region

Ghana

24.7% of streams from artists of other countries in region

Most Open to Import From Outside the Region

United Arab Emirates

91.6% of streams from artists of countries outside region

LATIN AMERICA

Most Local

Brazil

74.7% of Total On-Demand (Audio + Video) streams from a local Brazilian artist

Most Open to Import From the Region

Bolivia

64.5% of streams from artists of other countries in region

Most Open to Import From Outside the Region

Peru

35.8% of streams from artists of countries outside region

NOTE: COUNTRIES WITH MORE THAN 1B+ TOTAL ON-DEMAND (AUDIO + VIDEO) STREAMS IN H1 2025
SOURCE: LUMINATE MUSIC CONSUMPTION DATA

Import/Export: Country of Origin

ASIA

Most Local

India

78.0% of Total On-Demand (Audio + Video) streams from a local Indian artist

Most Open to Import From the Region

Hong Kong

63.7% of streams from artists of other countries in region

Most Open to Import From Outside the Region

The Philippines

62.3% of streams from artists of countries outside region

EUROPE

Most Local

Turkey

68.0% of Total On-Demand (Audio + Video) streams from a local Turkish artist

Most Open to Import From the Region

Austria

54.3% of streams from artists of other countries in region

Most Open to Import From Outside the Region

Portugal

69.0% of streams from artists of countries outside region

80% The United Kingdom ranks second in streaming share of artists from outside the European region but first in sheer volume of these streams, as 80% of UK Gen X report listening to artists from outside their home country, the highest of any generation cohort in the UK.

NOTE: COUNTRIES WITH MORE THAN 1B+ TOTAL ON-DEMAND (AUDIO + VIDEO) STREAMS IN H1 2025
SOURCE: LUMINATE MUSIC CONSUMPTION DATA

Import/Export: Genre Preference

In those countries that import the most music from outside their home region, these genres over- or under-index compared with their neighboring markets. Understanding these genre preferences helps tailor marketing efforts to specific international territories.

UNITED ARAB EMIRATES ON-DEMAND STREAMING

Over-Index	Under-Index
Bollywood	Gospel
Latin Pop	Afrobeats
Reggaeton	Traditional

Compared with the rest of Middle East & Africa

PERU ON-DEMAND STREAMING

Over-Index	Under-Index
Bollywood	Bluegrass
Folk	Gospel
K-pop	Blues

Compared with the rest of Latin America

PHILIPPINES ON-DEMAND STREAMING

Over-Index	Under-Index
Stage Musicals	Bollywood
Christian	J-pop
Gospel	Opera

Compared with the rest of Asia

PORTUGAL ON-DEMAND STREAMING

Over-Index	Under-Index
Latin	Middle Eastern
Traditional	Arabic EDM
Afrobeats	Arabic Pop

Compared with the rest of Europe

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

04

ENGAGEMENT HORIZON:

PROFILES OF TOMORROW'S SUPER FANS

Streaming growth is slowing in mature Western markets, with U.S. On-Demand Audio growth declining from 6.4% in 2024 to 4.6% so far in 2025. Still, this creates an opportunity to deepen engagement and foster long-term loyalty with highly valuable consumers through innovation. This section showcases Luminate insights on fan engagement across community platforms, podcasts, video games and film & TV.

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TAYLOR SWIFT
CREDIT: GILBERT FLORES

U.S. Fan Engagement Funnel

In Luminate's most recent audience response data, 18% of U.S. music listeners are considered super fans, meaning they engage with artists and music in 5 or more ways. However, there are different levels of fandom, and understanding where specific fan groups fit into the Fan Engagement Funnel helps marketers tailor activations and devise strategies to move fans closer to super fan status.

FUNNEL LEVEL (Showing % of Music Listeners)	% OF MUSIC LISTENERS
All Music Listeners	100%
Casual Fan: Uses free/ad-supported or programmed streaming services	80%
Active Fan: Paid DSP user OR casual fan (above) who purchases physical	66%
Engaged Fan: Paying fan (above) who engages with artists on at least 3 of 13 different activation channels*	36%
Super Fan: Consumer who engages with artists on at least 5 of 13 activation channels	18%

*ACTIVATION CHANNELS LISTED IN METHODOLOGY & FAQ SECTION AT BACK OF REPORT/SOURCE: LUMINATE INSIGHTS MUSIC 360 (U.S.)

U.S. Fan Levels: Attitudes, Behaviors and Beliefs

Different behaviors are evident at each level of fandom. For instance, Active Fans spend 14.8 hours with music weekly, but Engaged Fans spend not only more time with music but money on music-related activities than the level above. The chart below highlights attitudes and behaviors that are first evident at any level. Here we isolate the point at which the behavior emerges as a differentiator vs. the prior funnel level.

FUNNEL LEVEL (Showing % of Music Listeners)		TIME SPENT Avg. weekly hours	MONEY SPENT ON LIVE MUSIC PER MONTH (% vs. Music Listeners)	UNIQUE DISCOVERY CHANNELS *Showing channels with relatively high % or dense concentrations of the audience)	MUSIC ATTITUDES AND BELIEFS
All Music Listeners	100%	13.4	(base)	• AM/FM radio (43%) • Friends/relatives (41%)	• Like to listen to music from past decades
Casual Fan	80%	13.4	+9%	• Video/Audio streaming services (46%)	• Like curated playlists • Listen to music to help overcome personal/ emotional challenges
Active Fan	66%	14.8	+36%	• Satellite radio (19%, +39% vs. music listeners) • Live music events (19%, +30%)	• Consider themselves "influential" in their friends' lifestyle choices • Actively seek new/emerging artists
Engaged Fan	36%	16.3	+71%	• Video/Audio streaming services (56%) • Playlists on streaming services (42%) • Live music events (28%, +87% vs. music listeners)	• Willing to travel out of town to see live events • Buy merch to financially support artists • Want to be the "first" among friend group to discover new music and artists
Super Fan	18%	18.1	+80%	• Friends/relatives (65%) • Video/Audio streaming services (64%) • Playlists on streaming services (53%) • Live music events (36%, +140% vs. music listeners)	• Social signaling (being the "first" among friends); consider themselves "influential" • Want to personally connect with music and artists • Like to participate in the community or fandom

SOURCE: LUMINATE INSIGHTS MUSIC 360 (U.S.)

Community Engagement

Digital platforms enable deeper fan engagement and better targeting of niche communities. Genres with a high concentration of super fans perform exceptionally well on these platforms, offering valuable insight into fan behaviors to drive even greater engagement and unlock new monetization opportunities.

DISCORD

Genre Fans Who Over-Index

1. J-pop
2. K-pop
3. Electronic/Dance

Music Consumption Behaviors That Over-Index

Short music video clips (162)

Likelihood of Tipping Artists

(Compared with average U.S. Music Listener)

200% more likely

REDDIT

Genre Fans Who Over-Index

1. K-pop
2. Electronic/Dance
3. Afrobeats, J-pop (tie)

Music Consumption Behaviors That Over-Index

Vinyl records / LPs (158)

Likelihood of Tipping Artists

(Compared with average U.S. Music Listener)

83% more likely

TWITCH

Genre Fans Who Over-Index

1. J-pop

3. K-pop

3. Afrobeats

Music Consumption Behaviors That Over-Index

Short music video clips (168)

Likelihood of Tipping Artists

(Compared with average U.S. Music Listener)

150% more likely

WHATSAPP

Genre Fans Who Over-Index

1. Afrobeats
2. Latin
3. K-pop

Music Consumption Behaviors That Over-Index

Online/Digital radio (155)

Likelihood of Tipping Artists

(Compared with average U.S. Music Listener)

67% more likely

Historically a communication platform, WhatsApp launched new tools in 2025, such as the ability for users to add music to their status updates. This builds upon the platform's Channels launch, which can also drive artist-to-fan engagement.

SOURCE: LUMINATE INSIGHTS ARTIST + GENRE TRACKER (U.S.)

Gaming

196.7M+ Global Interactive* On-Demand Streams 4/4-7/3/25

*New metric — Interactive On-Demand: Interactive On-Demand Audio streams are from gaming platforms that allow users to choose their own music and engage with songs as part of the experience. Interactive streams can be ad supported or premium and are presented in this report for the first time.

CANADIAN GAMERS	UK GAMERS	GERMAN GAMERS	U.S. GAMER PROFILE
Millennial (32%)	Millennial (31%)	Millennial (30%)	Gen Z (29%)
Male (55%)	Male (54%)	Male (55%)	Male (56%)
Gamers are 20% more likely to stream short video clips online and engage with social media than the average CA music listener	+46% more likely to discover new music via short-form video platforms	Gamers are 27% more likely to engage with social media than the average German music listener	Gamers are 22% more likely to stream full-length videos (Netflix, Hulu) than the average U.S. music listener
Canadian gamers are 38% more likely to listen to EDM than the average CA music listener	Console and PC gamers are 52% more likely to say, "I am the first among my friends to discover new music and artists," compared with the average UK music listener	41% of German gamers cite friends/ relatives as a music discovery source, 13% more than the average German music listener	32% of Gen Z gamers discover new music via video games/game portals

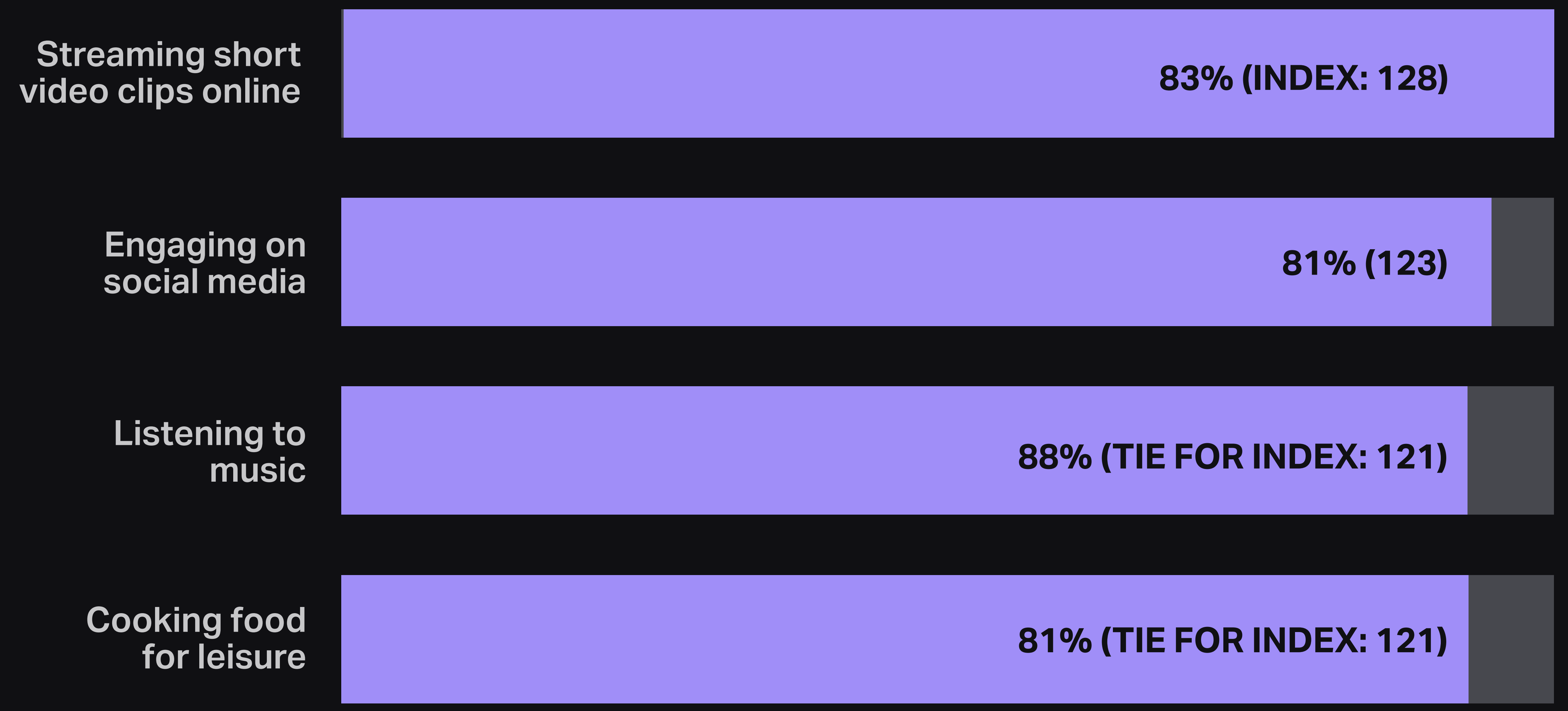
SOURCE: LUMINATE INSIGHTS MUSIC 360 (GLOBAL)

Podcasts

50% of U.S. podcast listeners are Gen Z or Millennial. While artists including Questlove and David Guetta host their own long-running podcasts, the format has become a key part of music marketing plans. But who are the listeners?

TOP ENTERTAINMENT ACTIVITIES OTHER THAN LISTENING TO PODCASTS

Compared with the average U.S. music listener, by index



GENRE FANS THAT OVER-INDEX FOR LISTENING TO PODCASTS

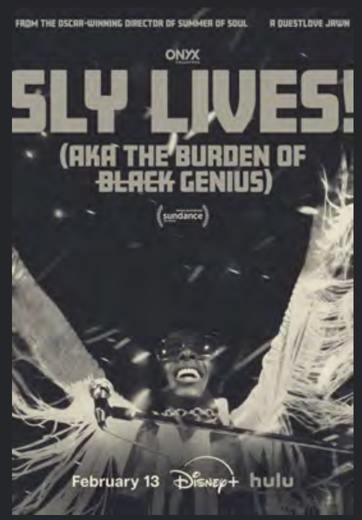
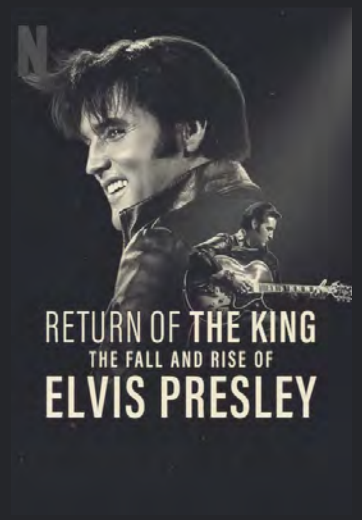
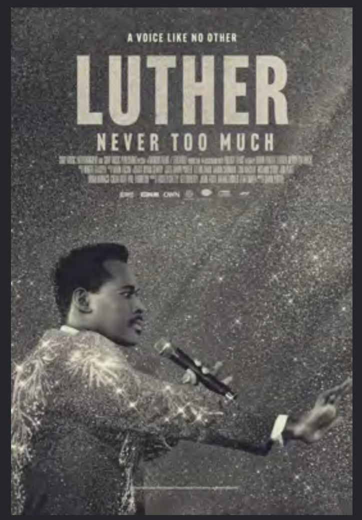
Compared with the average U.S. music listener, by index

37% of podcast listeners play a new album within the first week of its release and are 19% more likely to do so vs. the average consumer.

SOURCE: LUMINATE INSIGHTS MUSIC 360 (U.S.)

Top Music Documentaries So Far in 2025

Becoming Led Zeppelin ranks #1 in the U.S. as viewers gravitate to documentaries focusing on legacy artists.

	 *Becoming Led Zeppelin*	 *Avicii — I'm Tim*	 *Sly Lives! (aka the Burden of Black Genius)*	 *Return of the King: The Fall and Rise of Elvis Presley*	 *The Greatest Night in Pop*	 *Tom Petty: Heartbreakers Beach Party*	 *Luther: Never Too Much*	 *The Only Girl in the Orchestra*	 *Yacht Rock: A Dockumentary*	 *Beatles '64*
Music Doc Rank	1	2	3	4	5	6	7	8	9	10
Overall Doc Rank	9	23	28	36	38	49	54	60	62	64
Minutes Watched	329.8M	130.3M	109.0M	88.6M	82.2M	47.4M	43.1M	40.2M	39.1M	36.5M
Release Date	2/5/25	12/31/24	12/31/24	11/24/24	1/29/24	3/11/25	3/11/25	12/4/24	11/29/24	11/29/23
Platform	Netflix	Netflix	Hulu	Netflix	Netflix	Paramount+	HBO Max	Netflix	HBO Max	Disney+

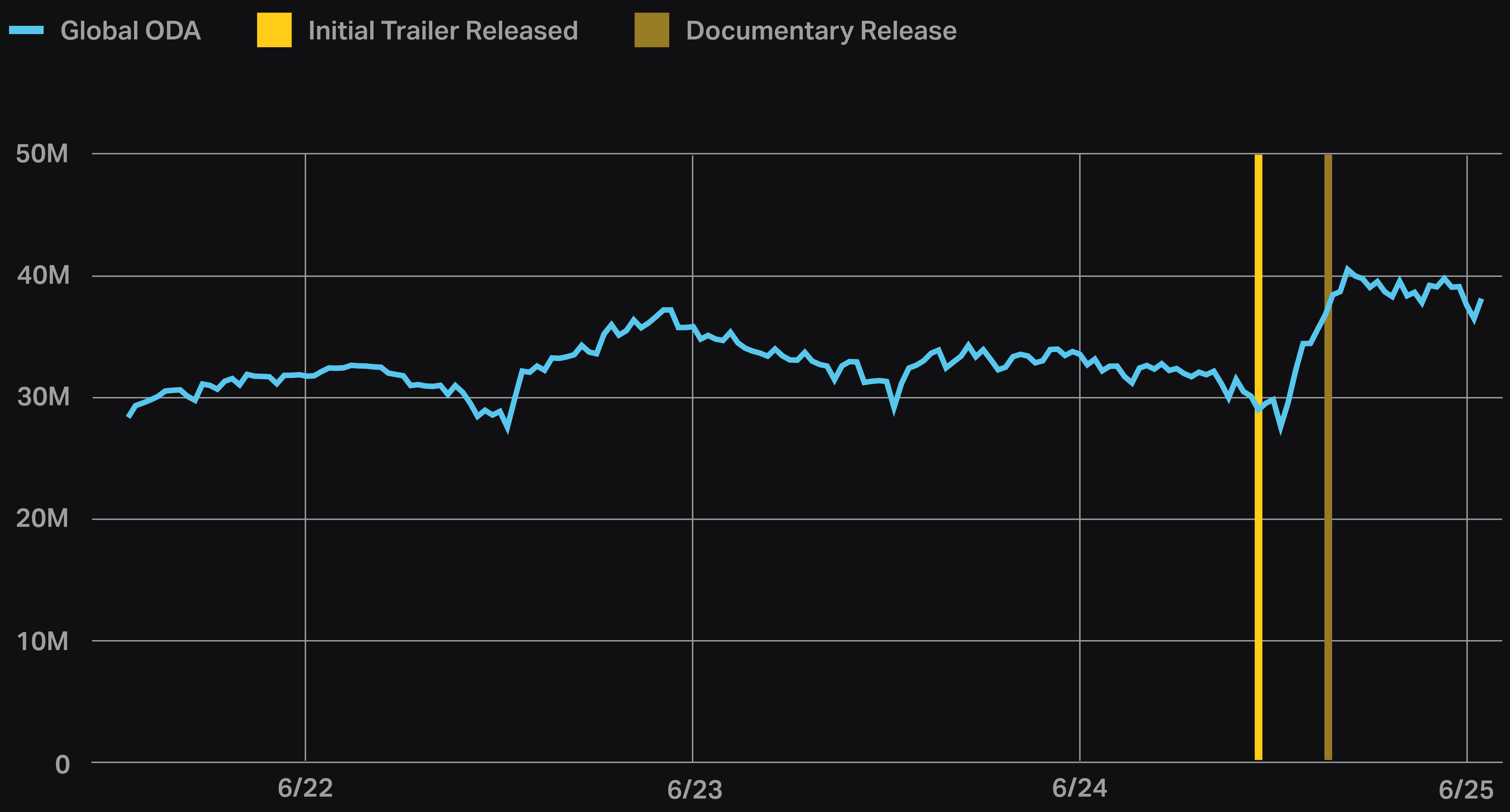
SOURCE: LUMINATE STREAMING VIEWERSHIP (M)

Top Music Documentaries So Far in 2025

Becoming Led Zeppelin ranks #1 in minutes watched, driving the iconic rock band's Global On-Demand Audio streams to their highest-ever weekly peak: 40.4M for the week ending 2/27/25.
Led Zeppelin's streams have also sustained a new baseline average of 39M per week through 7/03/25, which is +23% over the previous period.

LED ZEPPELIN: GLOBAL ON-DEMAND AUDIO STREAMS

2022-2025 YTD



TOP 5 COUNTRIES IN 3-WEEK ODA GROWTH

Rank	Country	Percent Change
1	Sweden	19.0%
2	United Kingdom	15.3%
3	Poland	14.9%
4	Australia	14.9%
5	United States	12.9%

Filtered to countries with over 1M weekly ODA streams

2/7-2/27/25 vs. 1/17-2/6/25

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

05

ARTIST SPECTRUM:

TRACKING THE NEXT SUPERSTARS, RISING TALENTS AND MORE

A key business focus is identifying the next generation of superstars who will energize the industry and captivate fans. This section leverages the Luminate Index for a quantitative analysis of emerging superstars, rising talents and tomorrow's stars.

LUMINATE MIDYEAR MUSIC REPORT 2025 LUMINATE MIDYEAR MUSIC REPORT 2025 LUMINATE MIDYEAR MUSIC REPORT 2025

JELLY ROLL
CREDIT: CHRISTOPHER POLK

The Luminate Index

The Luminate Index provides an understanding of the depth, breadth and affinity of an artist's fandom among consumers. It demonstrates a quantitative approach to defining the new class of superstars as well as other key artist segments.

Streaming & Social Data		Audience Intelligence Survey Data		
Streaming Footprint	Social Media Footprint	Artist Awareness	Public Perception	Engagement Scores*
30% of overall score	**15%**	**25%**	**15%**	**15%**

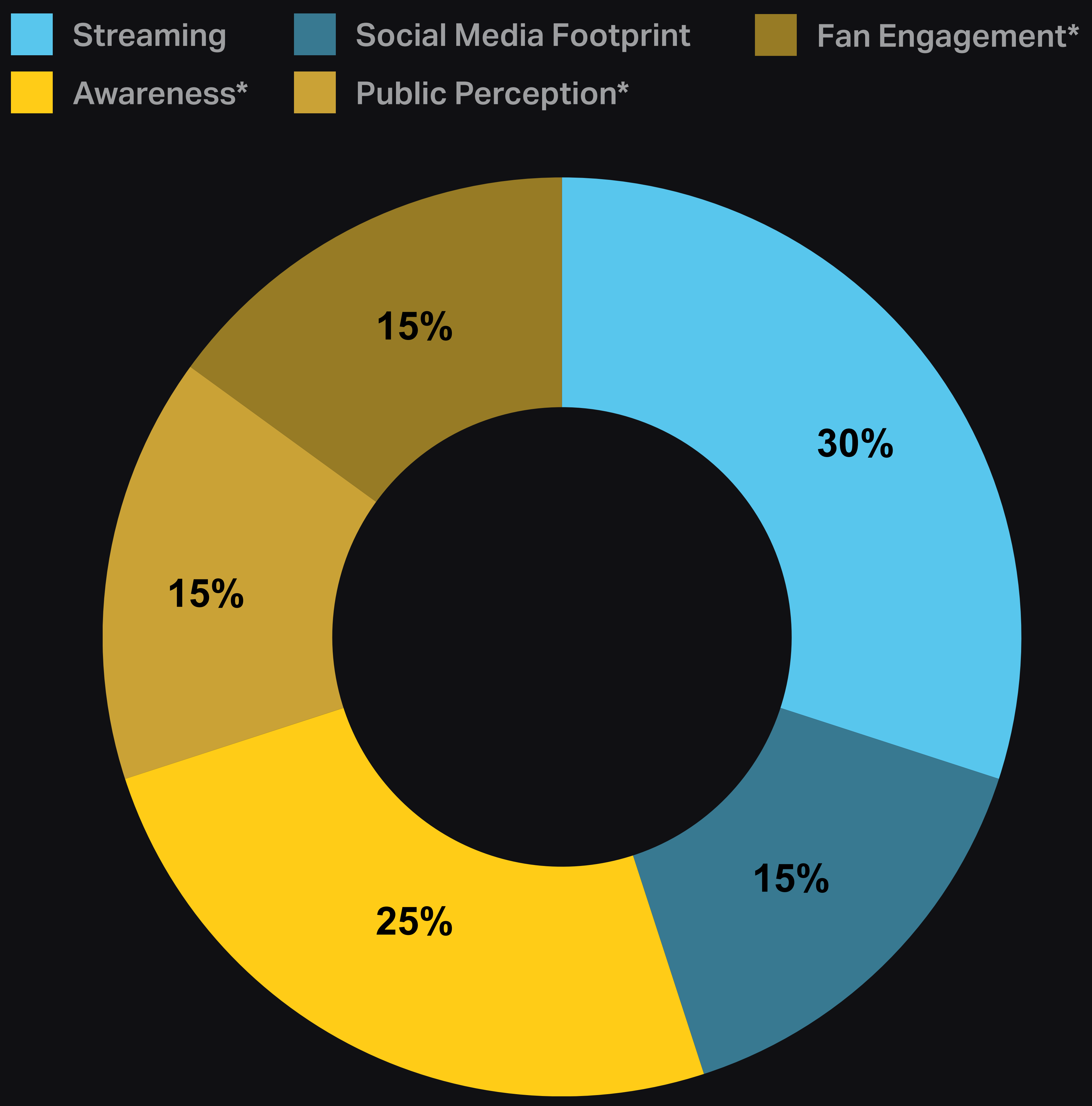
Luminate Index
(0-100)

* ENGAGEMENT METRICS INCLUDE: TUNE-IN/WATCH ON TV, LIVE EVENT TICKETING, LIVESTREAM TICKETING, BRAND ENGAGEMENT
SOURCE: LUMINATE INSIGHTS; LUMINATE MUSIC CONSUMPTION DATA

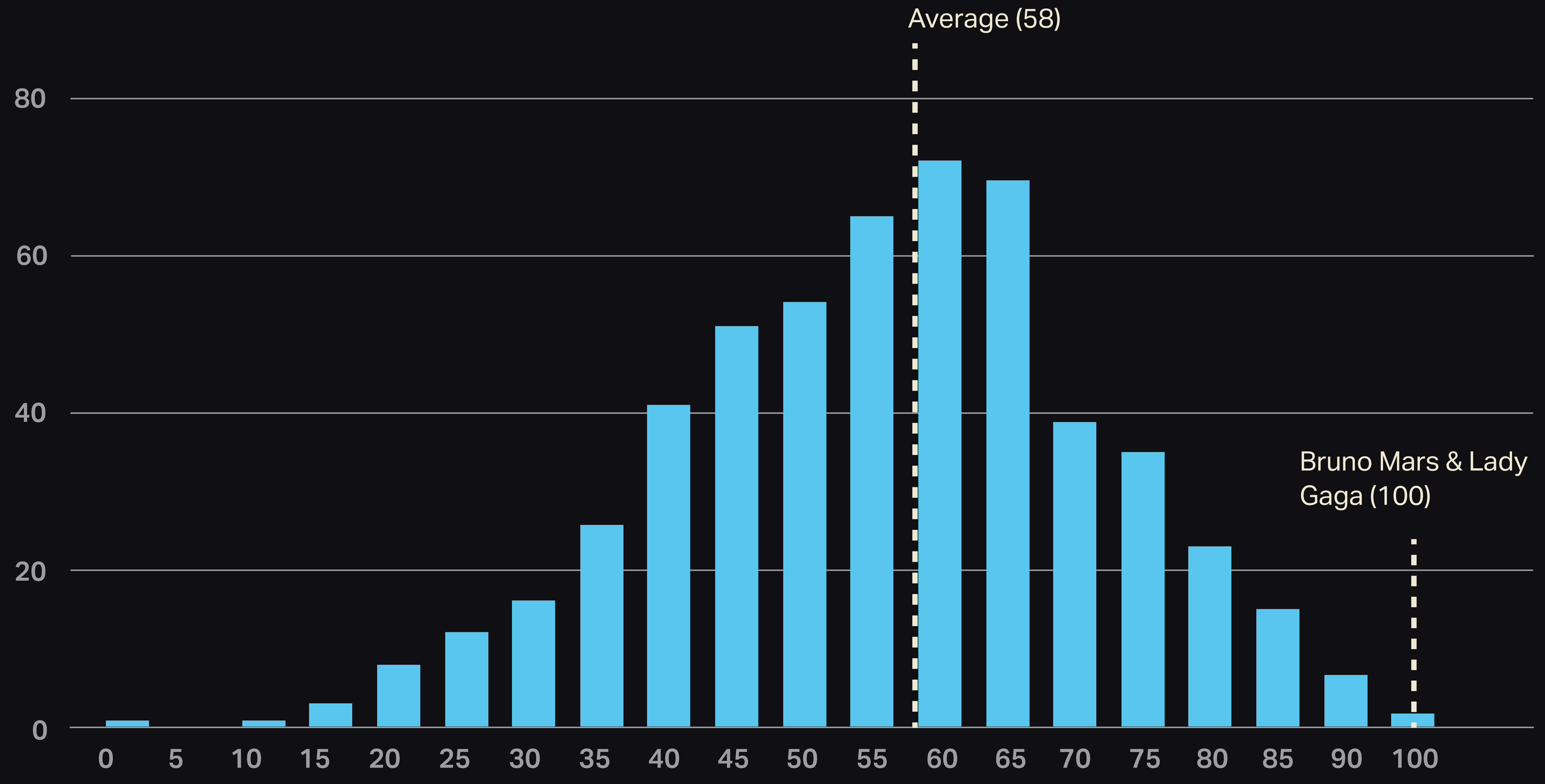
Luminate Index Methodology

The Luminate Index is a composite metric meant to provide labels, brands and agencies with an understanding of the depth, breadth and affinity of an artist's fandom among U.S. consumers. Each of the five unique components below contributes to that composite score, with some contributing more or less than others.

INDEX COMPONENT WEIGHTS/COMPOSITION



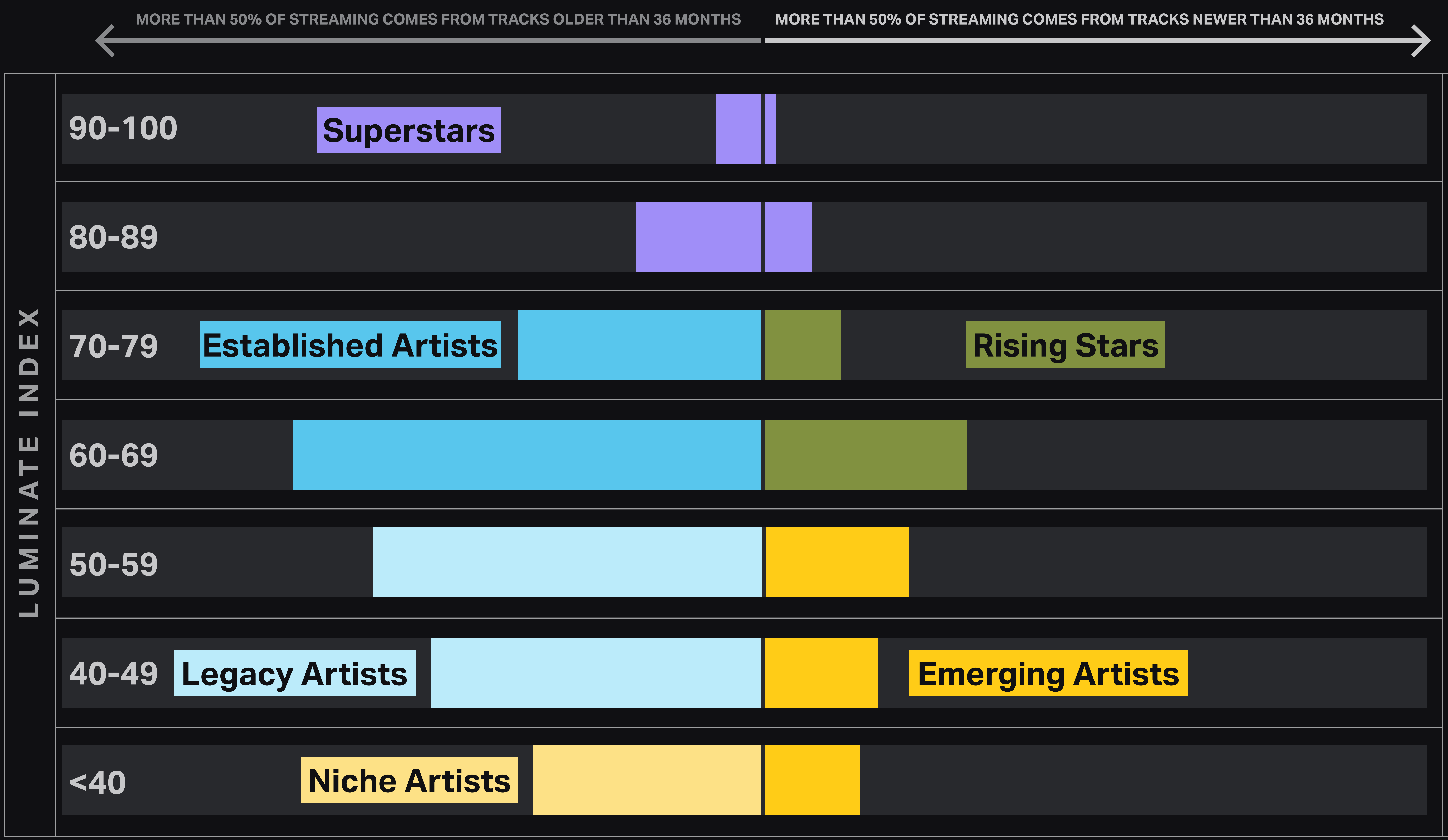
DISTRIBUTION OF ARTIST INDEXES



*SURVEY-BASED COMPONENTS
SOURCE: LUMINATE INSIGHTS; LUMINATE MUSIC CONSUMPTION DATA

Artist Segments

From superstars to niche artists, this framework provides a quantitive definition of artist thresholds based on streaming music consumption as well as audience perception.

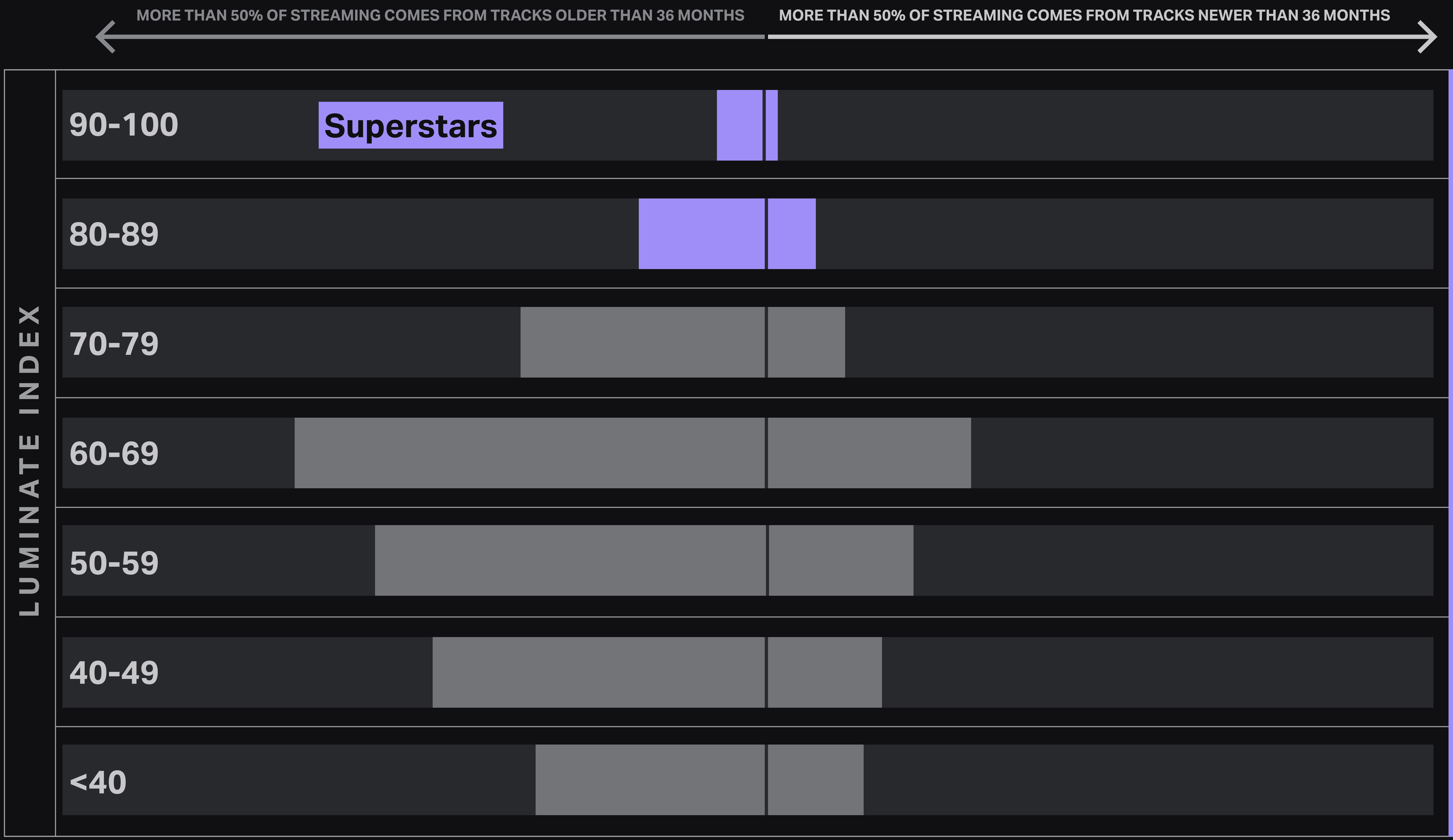


This dataset reflects the distribution of the 545 artists tested through the Luminate Artist + Genre Tracker and is not meant to be representative of distributions among all artists across the music landscape, meaning that 9% of all artists are not superstar level, etc.

SOURCE: LUMINATE INSIGHTS; LUMINATE MUSIC CONSUMPTION DATA

Artist Segments: Superstars

The Luminate Index and streaming age analysis provide a quantitative framework to identify the new superstars.



9%

of artists in our index qualify as Superstars

Definition: Artists whose Luminate Index **value is 80+** regardless of their release age streaming distributions

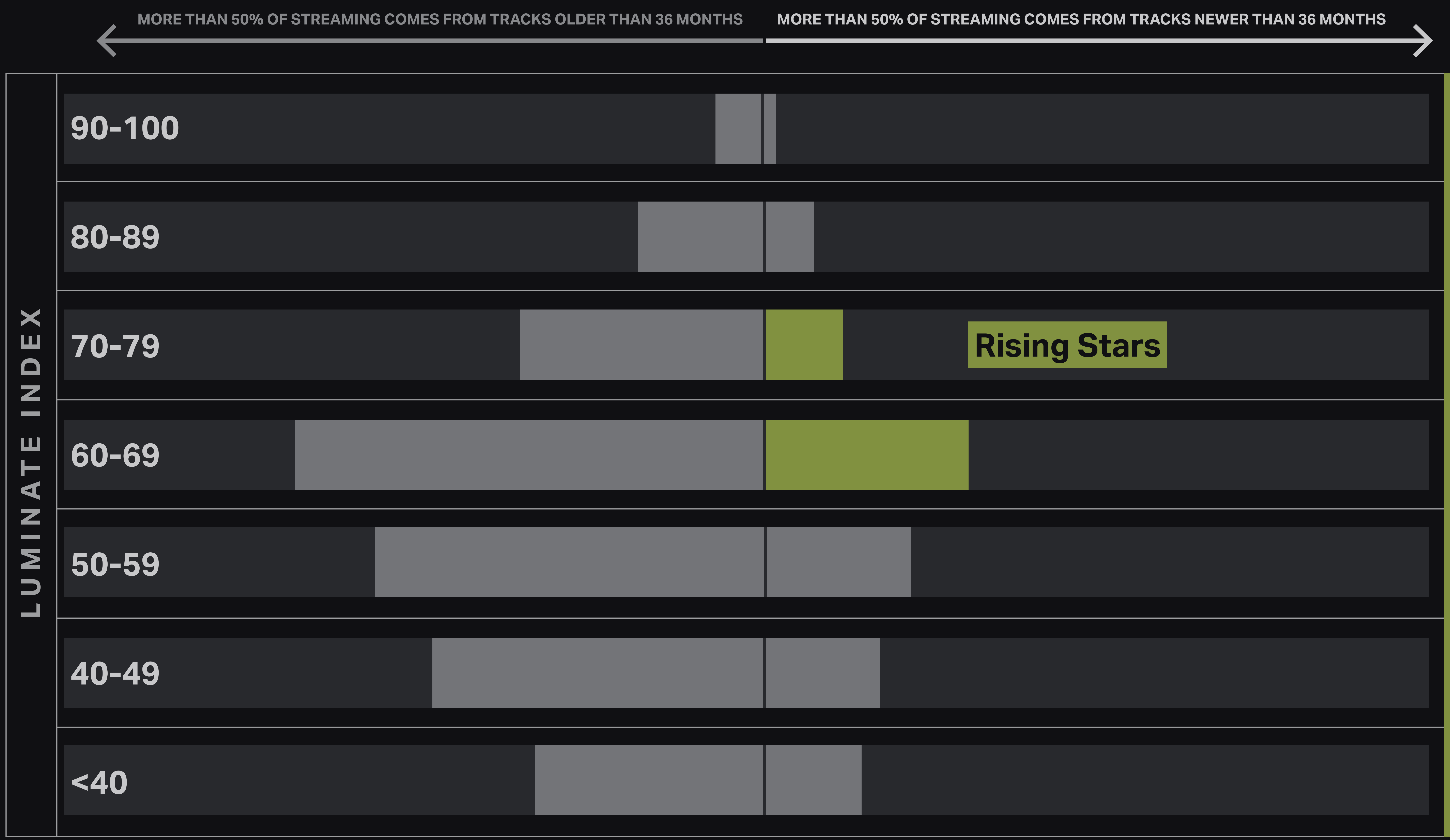
"New" Superstars include:

- Sabrina Carpenter
- Fuerza Regida
- Jelly Roll
- Morgan Wallen
- Rod Wave

This dataset reflects the distribution of the 545 artists tested through the Luminate Artist + Genre Tracker and is not meant to be representative of distributions among all artists across the music landscape, meaning that 9% of all artists are not superstar level, etc.

SOURCE: LUMINATE INSIGHTS; LUMINATE MUSIC CONSUMPTION DATA

Artist Segments: Rising Stars



11%

of artists in our index qualify as Rising Stars

Definition: Artists whose Luminate Index value is 60-79, with **more than 50%** of their streaming coming from tracks **newer than 36 months**

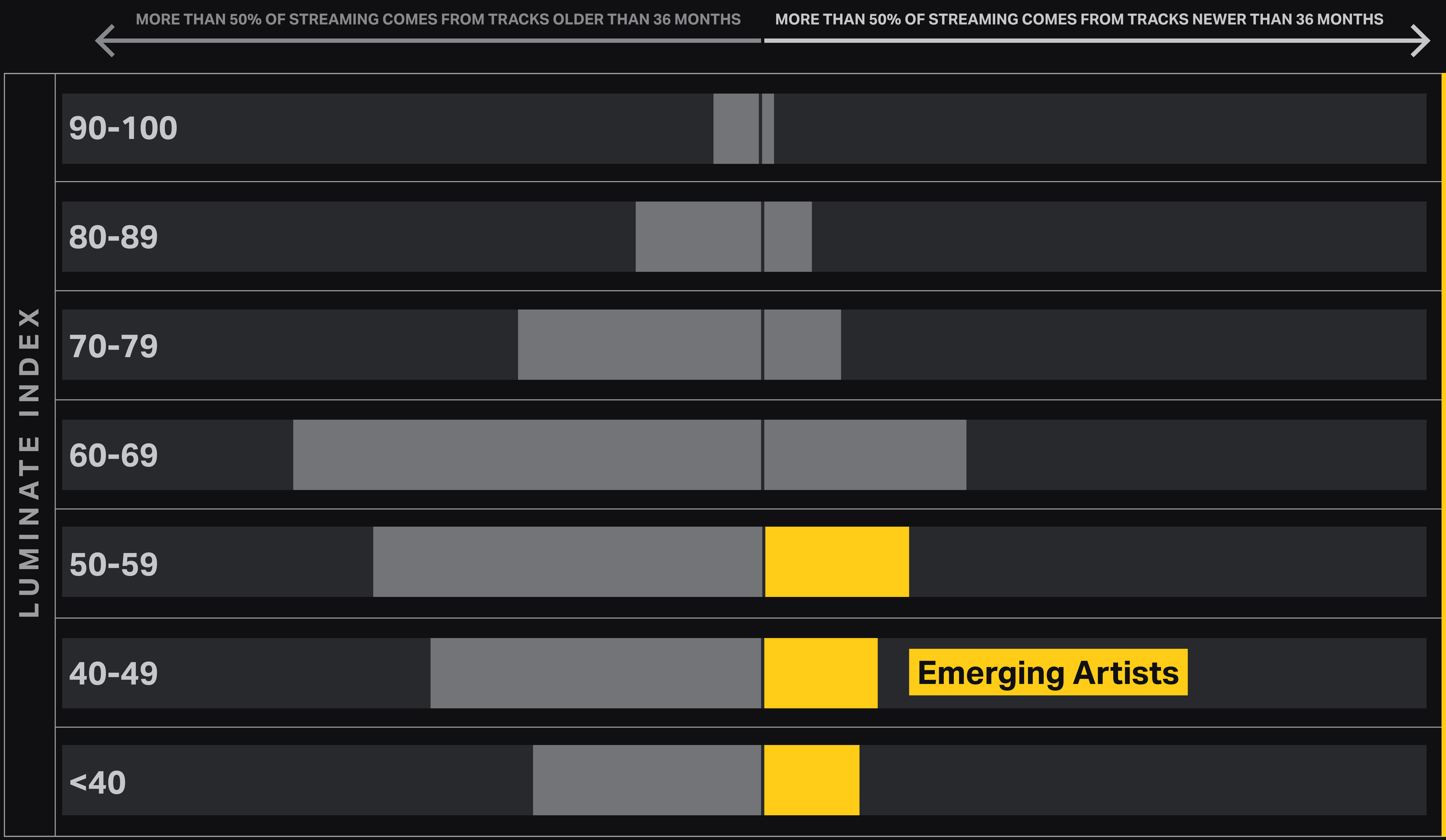
Rising Stars include:

- Benson Boone
- Doechii
- Chappell Roan
- Teddy Swims
- Tems

This dataset reflects the distribution of the 545 artists tested through the Luminate Artist + Genre Tracker and is not meant to be representative of distributions among all artists across the music landscape, meaning that 9% of all artists are not superstar level, etc.

SOURCE: LUMINATE INSIGHTS; LUMINATE MUSIC CONSUMPTION DATA

Artist Segments: Emerging Artists



14%

of the artists in our index qualify as Emerging Artists

Definition: Artists whose Luminate Index value is below 60, with **more than 50%** of their streaming coming from tracks **newer than 36 months**

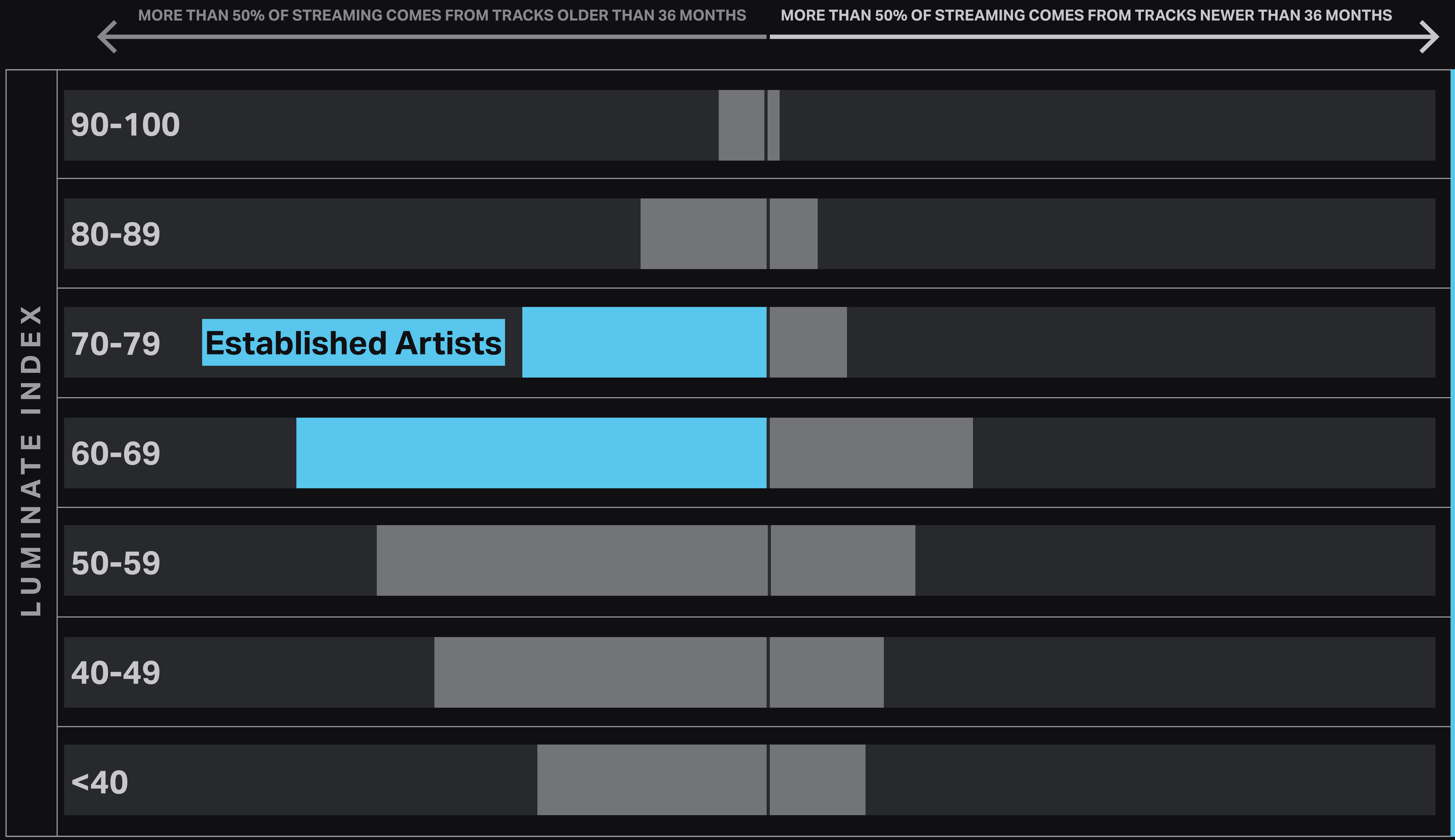
Emerging Artists include:

- aespa
- Lizzy McAlpine
- Caroline Polachek
- Nate Smith
- Veeze

This dataset reflects the distribution of the 545 artists tested through the Luminate Artist + Genre Tracker and is not meant to be representative of distributions among all artists across the music landscape, meaning that 9% of all artists are not superstar level, etc.

SOURCE: LUMINATE INSIGHTS; LUMINATE INDEX MUSIC CONSUMPTION DATA

Artist Segments: Established Artists



28%

of the artists in our index qualify as Established Artists

Definition: Artists whose Luminate Index value is 60-79, with **more than 50%** of their streaming coming from tracks **older than 36 months**

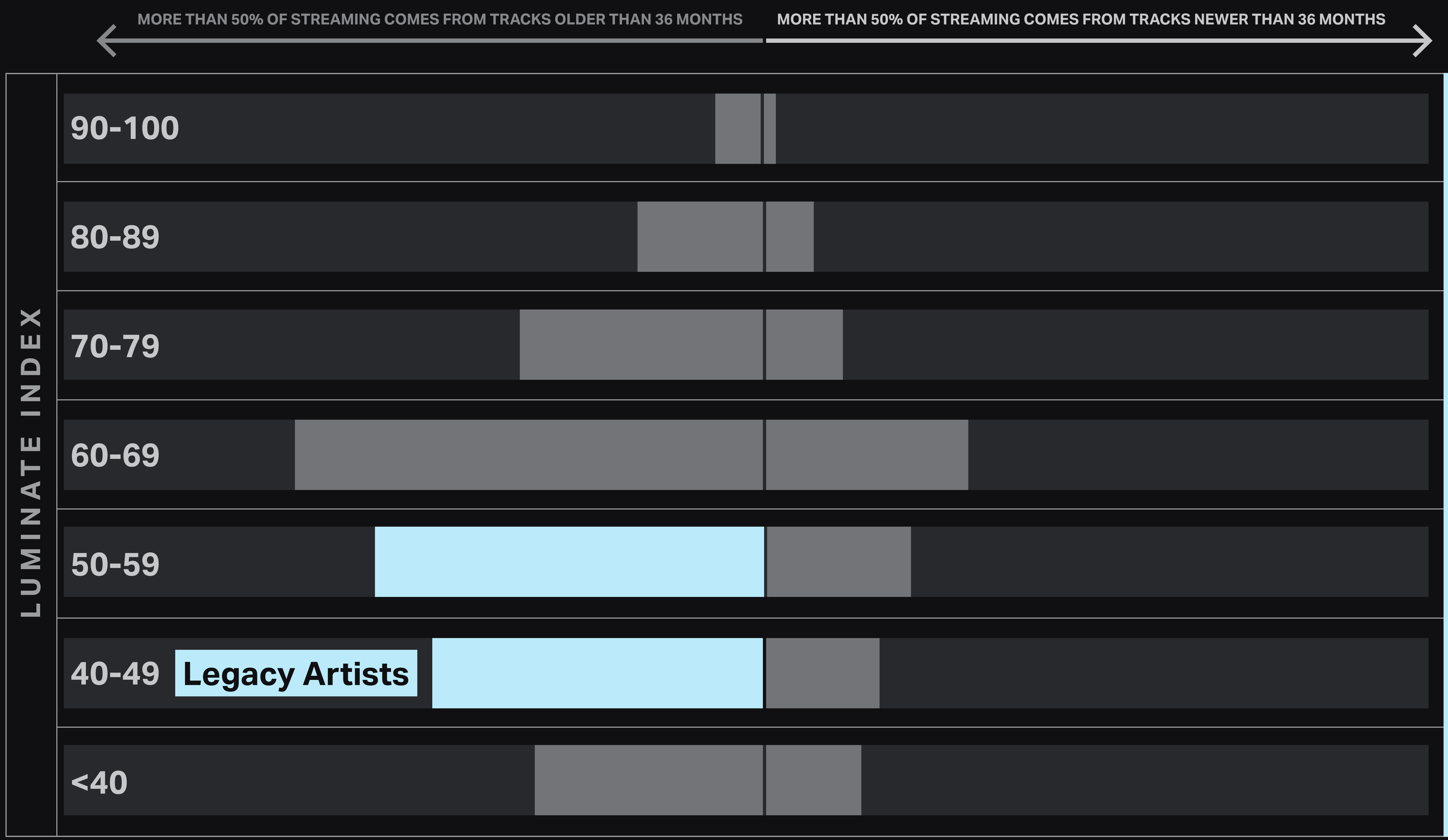
Established Artists include:

- Miley Cyrus
- Dua Lipa
- Imagine Dragons
- Lil Wayne
- Romeo Santos

This dataset reflects the distribution of the 545 artists tested through the Luminate Artist + Genre Tracker and is not meant to be representative of distributions among all artists across the music landscape, meaning that 9% of all artists are not superstar level, etc.

SOURCE: LUMINATE INSIGHTS; LUMINATE MUSIC CONSUMPTION DATA

Artist Segments: Legacy Artists



28%

of the artists in our index qualify as Legacy Artists

Definition: Artists whose Luminate Index value is 40-59, with **more than 50%** of their streaming coming from tracks **older than 36 months**

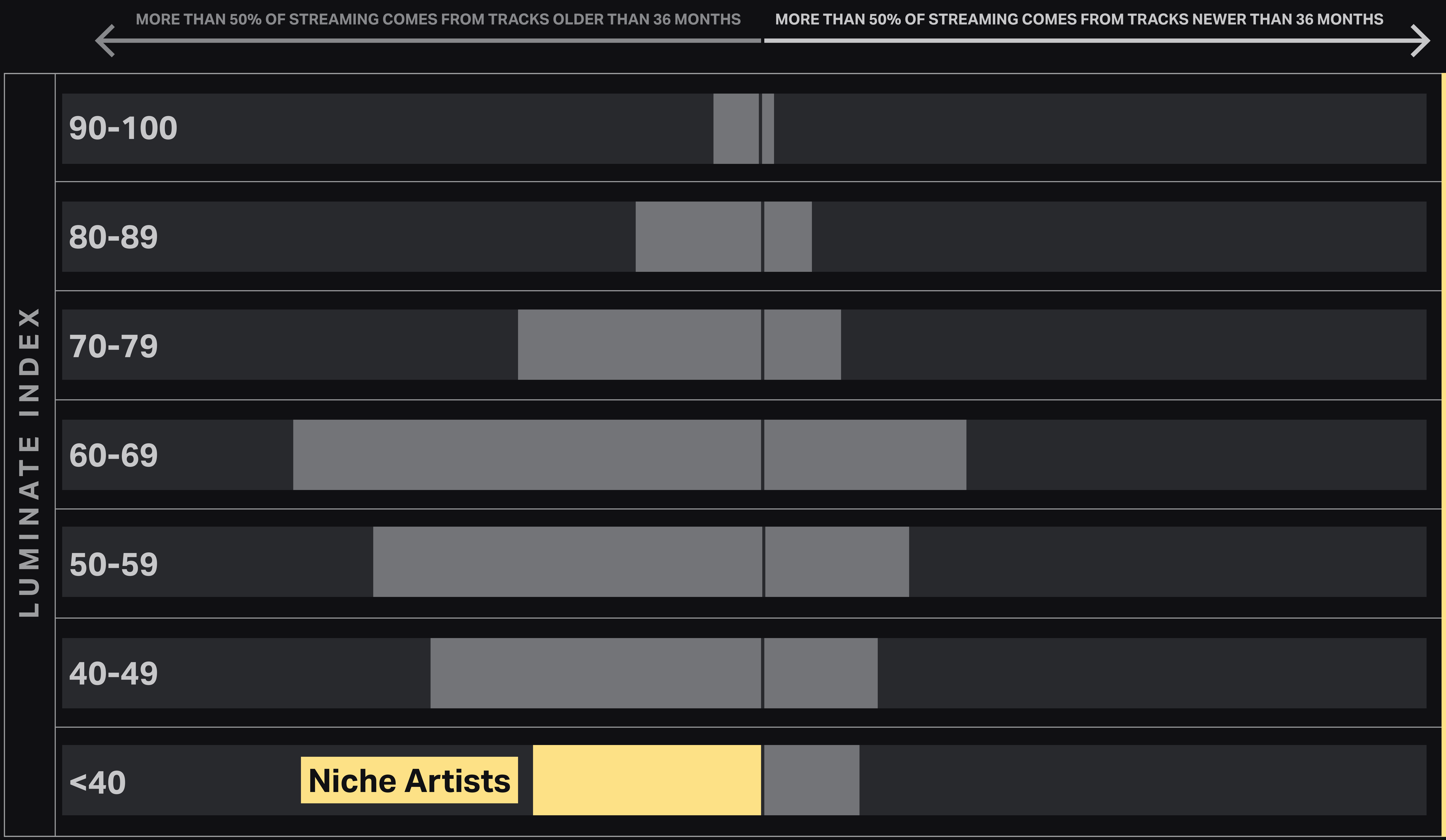
Legacy Artists include:

- Chase Atlantic
- Calvin Harris
- Foreigner
- Migos
- Papa Roach

This dataset reflects the distribution of the 545 artists tested through the Luminate Artist + Genre Tracker and is not meant to be representative of distributions among all artists across the music landscape, meaning that 9% of all artists are not superstar level, etc.

SOURCE: LUMINATE INSIGHTS; LUMINATE MUSIC CONSUMPTION DATA

Artist Segments: Niche Artists



9%

of the artists in our index qualify as Niche Artists

Definition: Artists whose Luminate Index value is below 40, with **more than 50%** of their streaming coming from **tracks older than 36 months**

Niche Artists include:

- Björk
- Kate Bush
- Hollywood Undead
- Phish
- Skrillex

This dataset reflects the distribution of the 545 artists tested through the Luminate Artist + Genre Tracker and is not meant to be representative of distributions among all artists across the music landscape, meaning that 9% of all artists are not superstar level, etc.

SOURCE: LUMINATE INSIGHTS; LUMINATE MUSIC CONSUMPTION DATA

06

FUTURE IN FOCUS:

SPOTLIGHTING TOP MUSIC TRENDS TO WATCH

From cross-platform marketing to emerging audience perspectives on live music and AI, here are three brief looks at trends to keep an eye on over the rest of 2025.

LUMINATE MIDYEAR MUSIC REPORT 2025 LUMINATE MIDYEAR MUSIC REPORT 2025 LUMINATE MIDYEAR MUSIC REPORT 2025

THE WEEKND

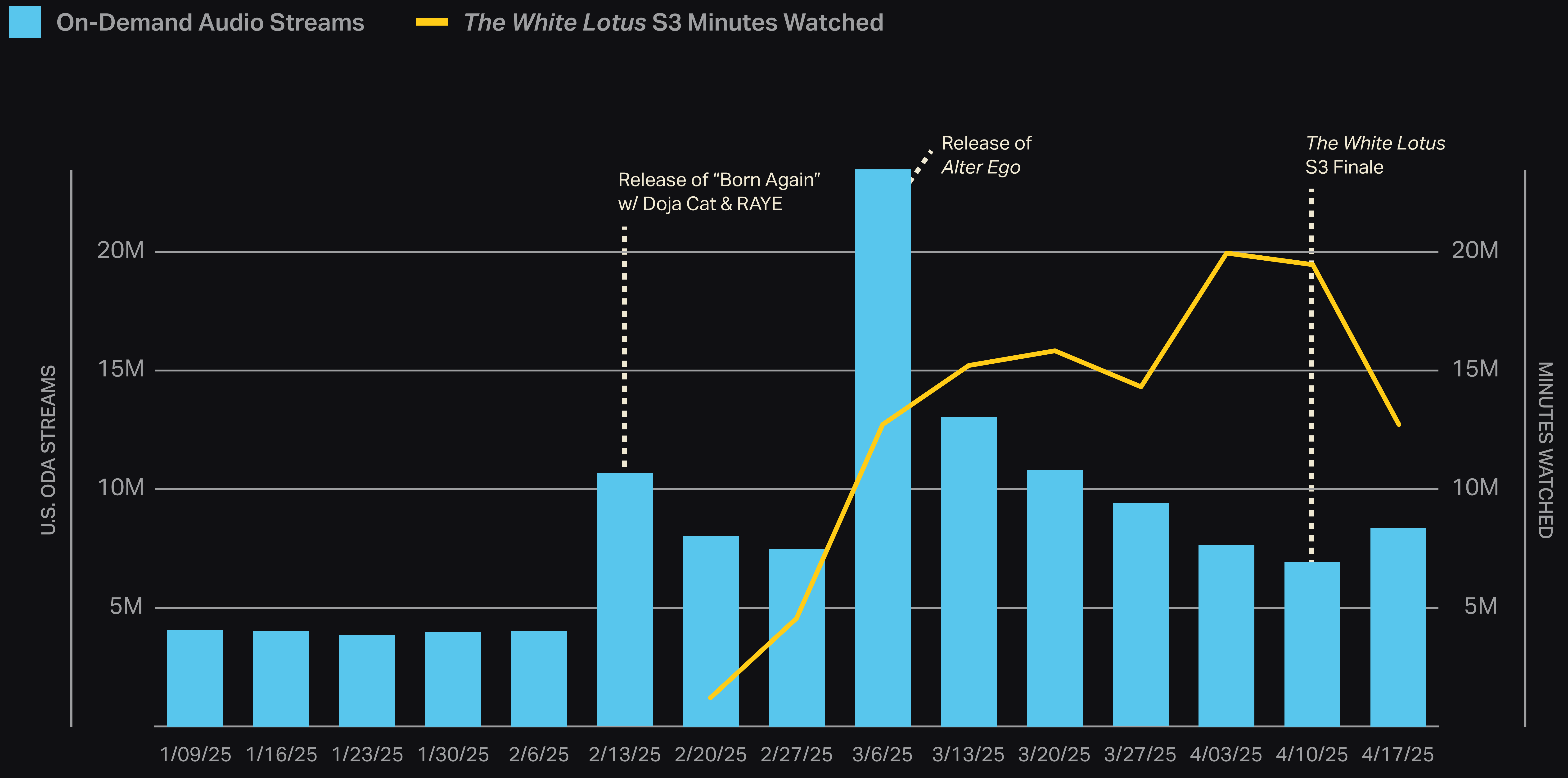
CREDIT: KRISTINA BUMPHREY

Cross-Platform Performance: Music, Film & TV and Lifestyle Converge in Today's Entertainment

Thai artist LISA (also a member of K-pop group BLACKPINK) starred as Mook in season 3 of HBO's *The White Lotus*. The season's release window coincided with the release period for LISA's album *Alter Ego* and helped introduce her to new audiences, while her presence in the show brought fans to the series who are particularly interested in travel — a key component of *The White Lotus*.

LISA U.S. STREAMS & *THE WHITE LOTUS*

2025: Week ending 4/17/25



Compared with the average U.S. consumer:

2x — LISA fans are twice as likely to book a cruise

112% — LISA fans are 112% more likely to book a vacation rental (e.g., Airbnb)

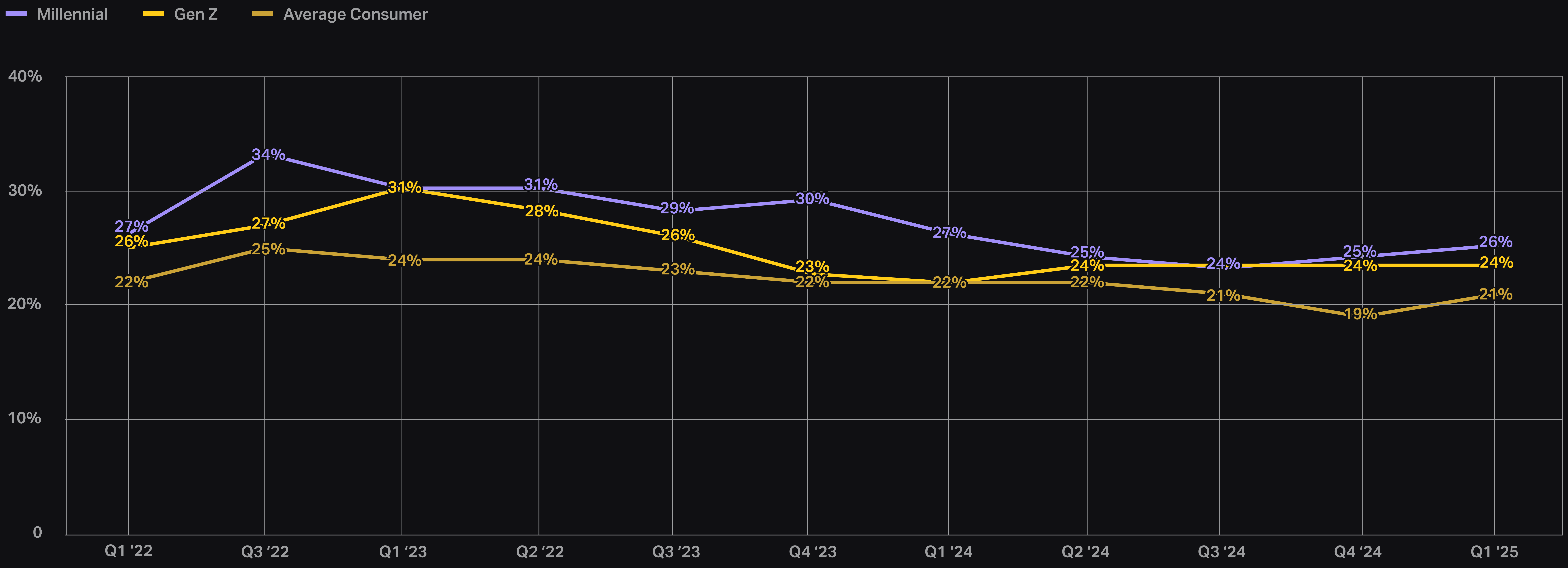
93% — LISA fans are 93% more likely to book an airline ticket

SOURCE: LUMINATE MUSIC CONSUMPTION DATA; LUMINATE STREAMING VIEWERSHIP (M); LUMINATE INSIGHTS ARTIST + GENRE TRACKER (U.S.)

Future Festival Intent

In Q1 2025, intention to attend festivals was lower than it has been historically in the U.S., especially among Millennials. This aligns with industry news of challenges for U.S. festivals over the past 18 months. The upshot: Q1 2025 marks the first instance in several years where future festival intent actually improved vs. the previous quarter among the average consumer.

U.S. AUDIENCE FUTURE FESTIVAL INTENT



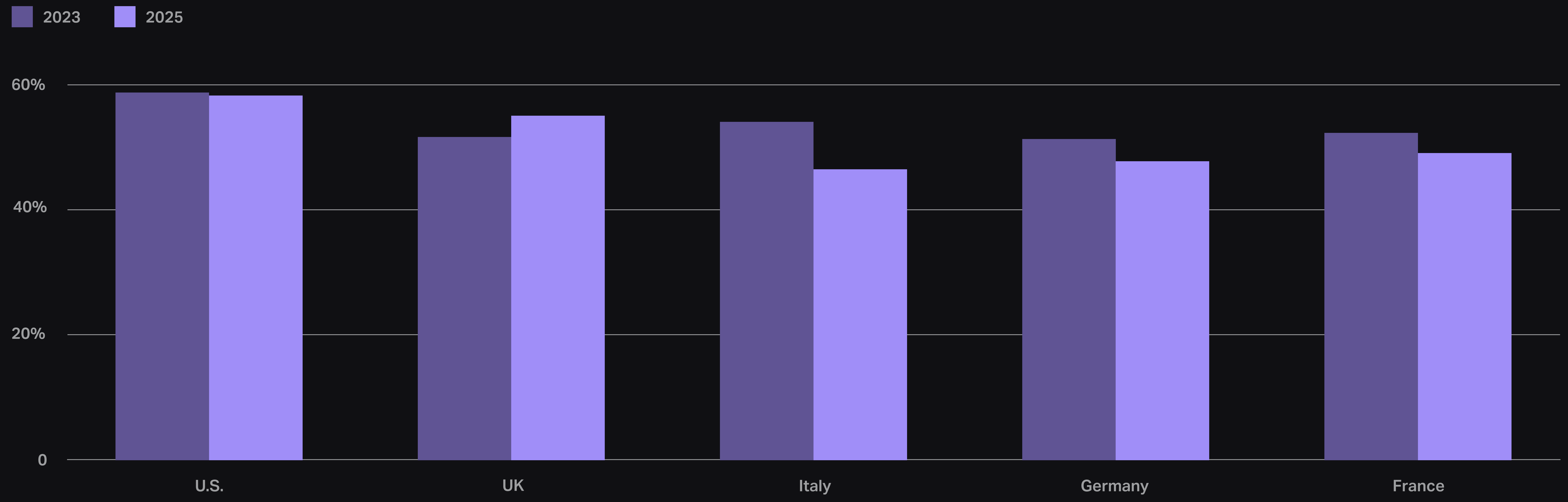
SOURCE: LUMINATE INSIGHTS MUSIC 360 (U.S.)

U.S. and Europe: Concerns Over Cost of Festival Tickets

Frustration over prices is the #1 barrier to buying festival tickets in each of these countries, however ...

- U.S. concern over ticket prices dipped slightly in Q1 2025 after a period of increase in recent quarters
- Compared with festivalgoers in the U.S., concern over ticket prices is declining at a steeper rate in Italy, Germany and France
- More festival attendees in the UK are citing the cost of a ticket as a concern compared with 2023

COST AS BARRIER TO BUYING LIVE EVENT TICKETS



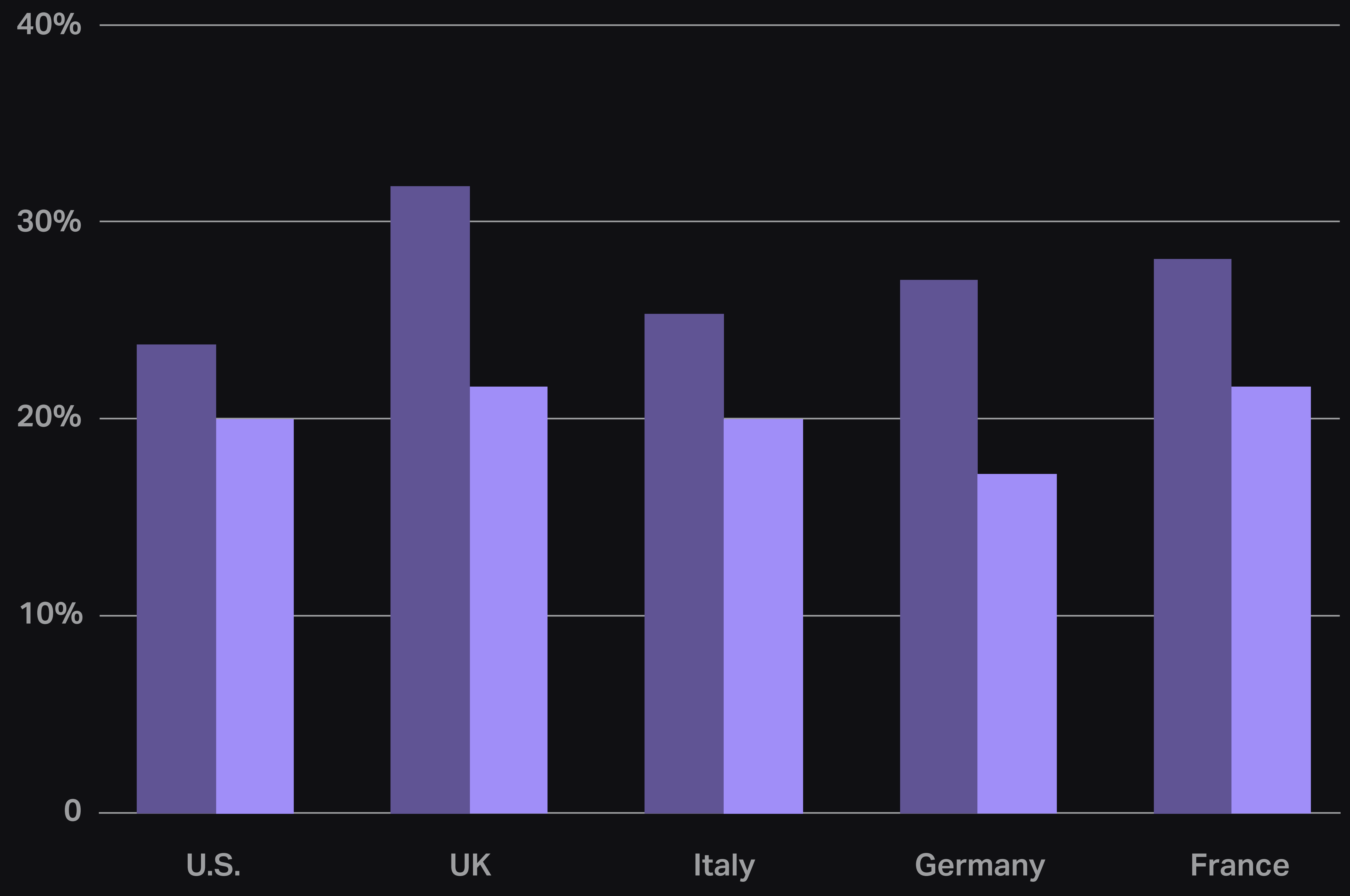
SOURCE: LUMINATE INSIGHTS MUSIC 360 (GLOBAL)

Gen Z in Europe: Future Festival Intent

Gen Z in the UK, Italy, Germany and France are more likely to attend festivals than the average consumer in their own country, with UK Gen Z in particular more interested than their fellow citizens. Additionally, compared with their U.S. counterparts, these fans are more likely to plan on attending a festival in the next 12 months, indicating the continued strength of the European festival market.

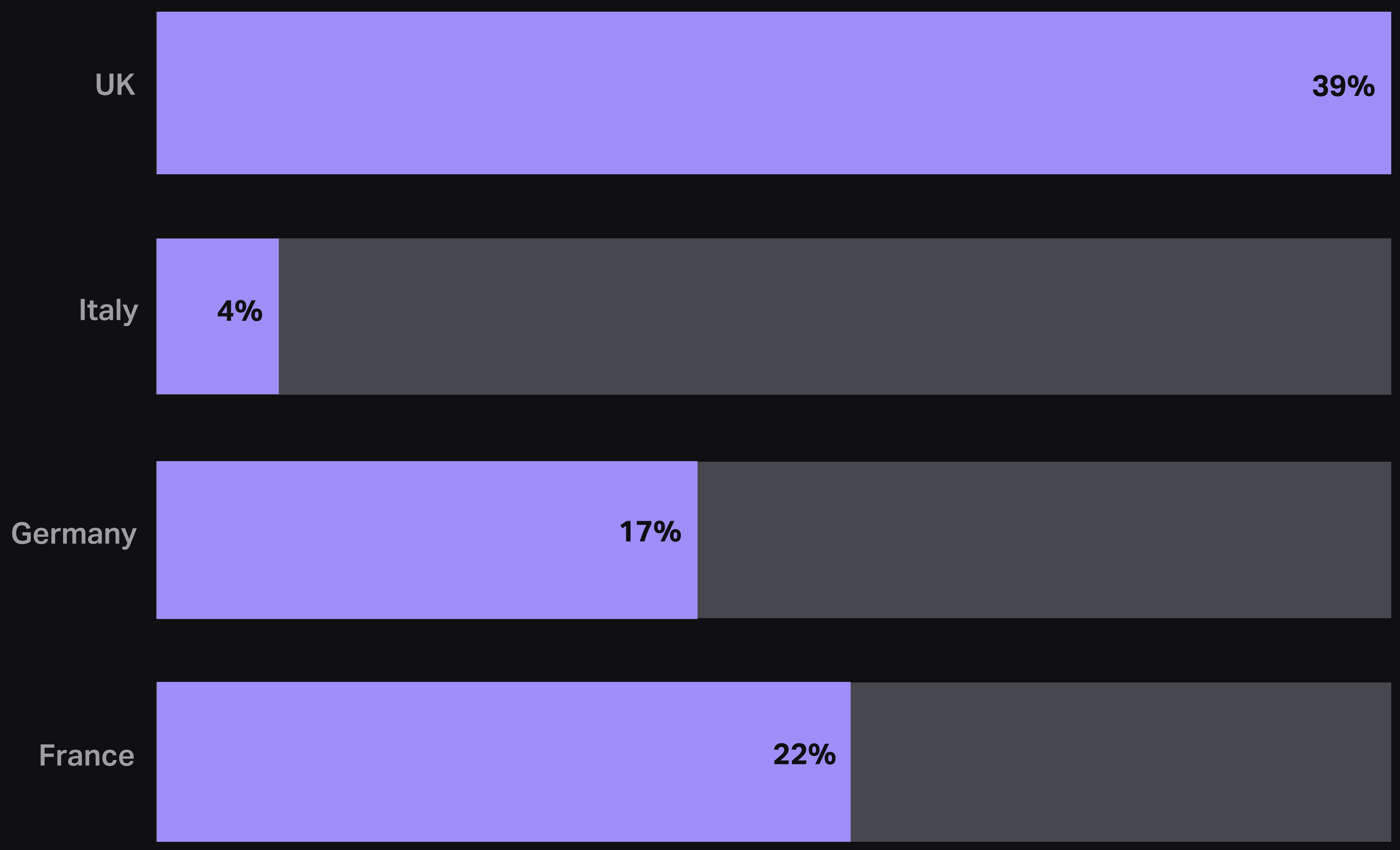
LOCAL GEN Z COMPARED WITH OWN COUNTRY AVERAGE

Gen Z Own Country Average



INDEXED TO U.S. GEN Z

Read as: Gen Z in the UK are +39% more likely to plan on attending a festival in the next 12 months vs. Gen Z in the U.S.



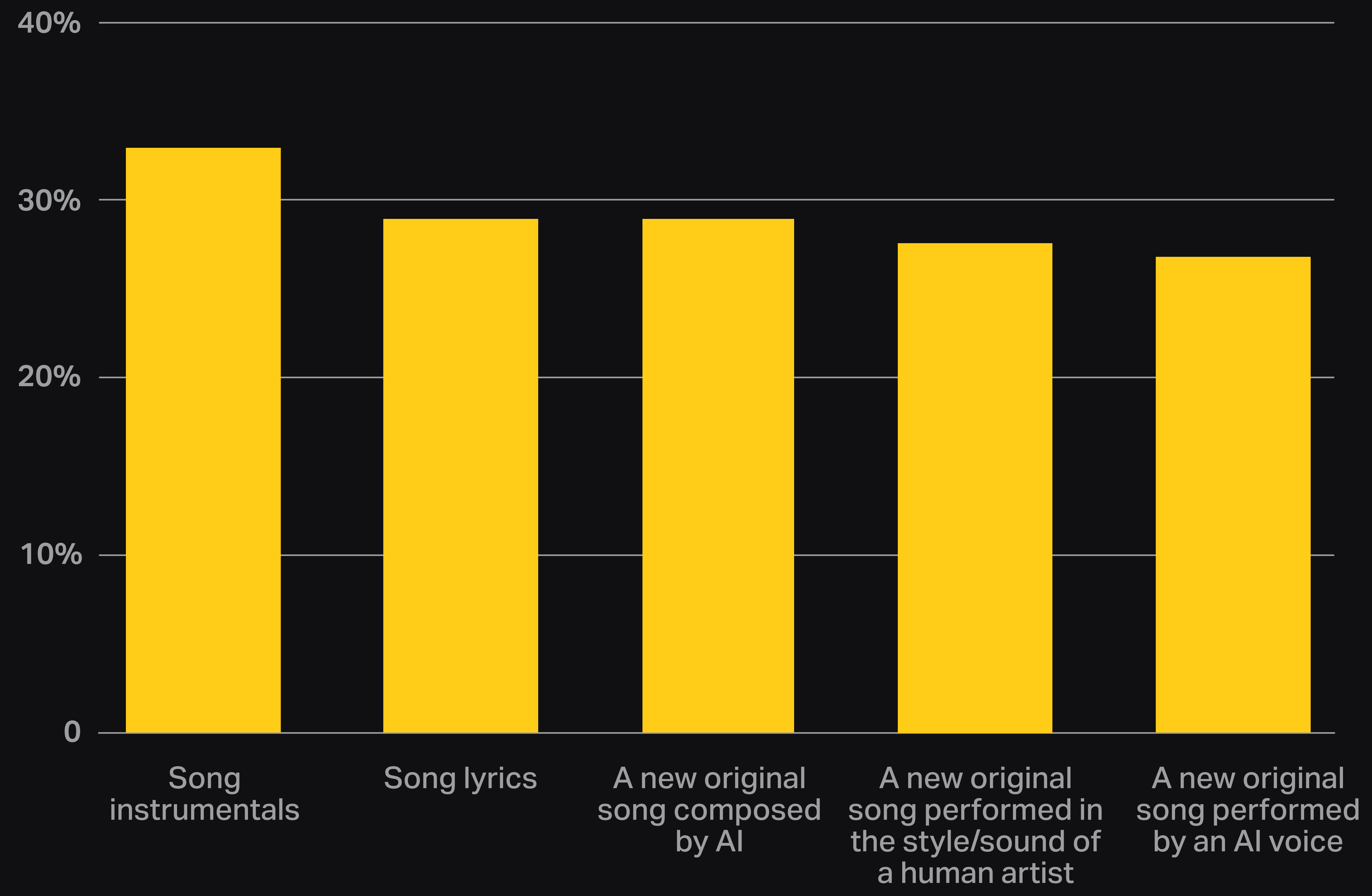
SOURCE: LUMINATE INSIGHTS MUSIC 360 (GLOBAL)

Generative AI for Music Creation

1 in 3 U.S. music listeners report being "somewhat" or "very" comfortable with the use of generative AI to create song instrumentals, with younger music listeners showing higher levels of comfort. And while 44% report being "somewhat" or "very" ***un***comfortable with the use of gen AI for creation of a new original song performed by an AI voice, some genre listeners, including EDM and K-pop, are more open to the practice.

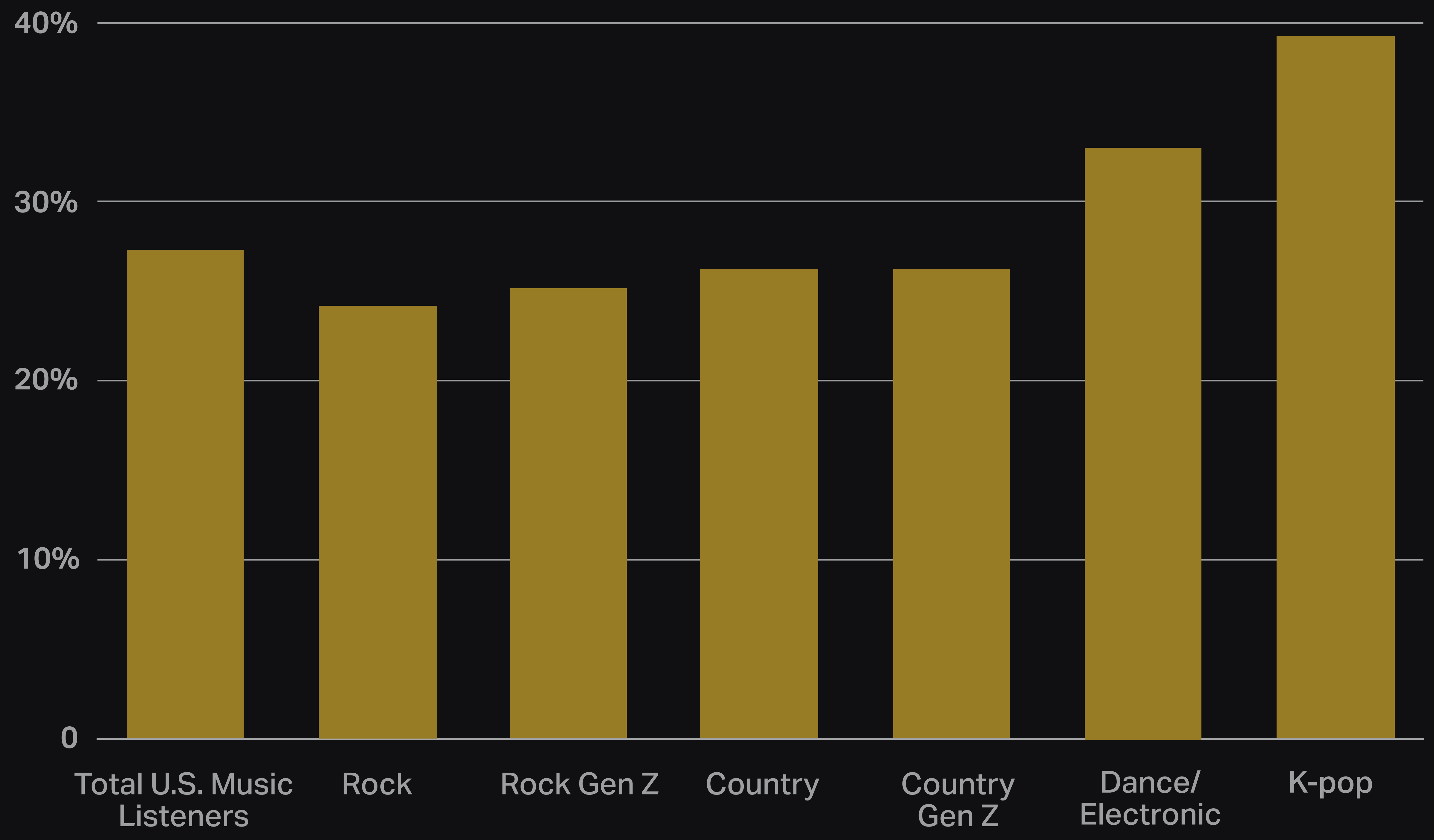
U.S. MUSIC LISTENERS VS. AI MUSIC

Percentage of U.S. music listeners that are "somewhat" or "very" comfortable with generative AI being used to create the following



NEW ORIGINAL SONG PERFORMED BY AN AI VOICE

Percentage of U.S. genre listeners that are "somewhat" or "very" comfortable with a new original song performed by an AI voice



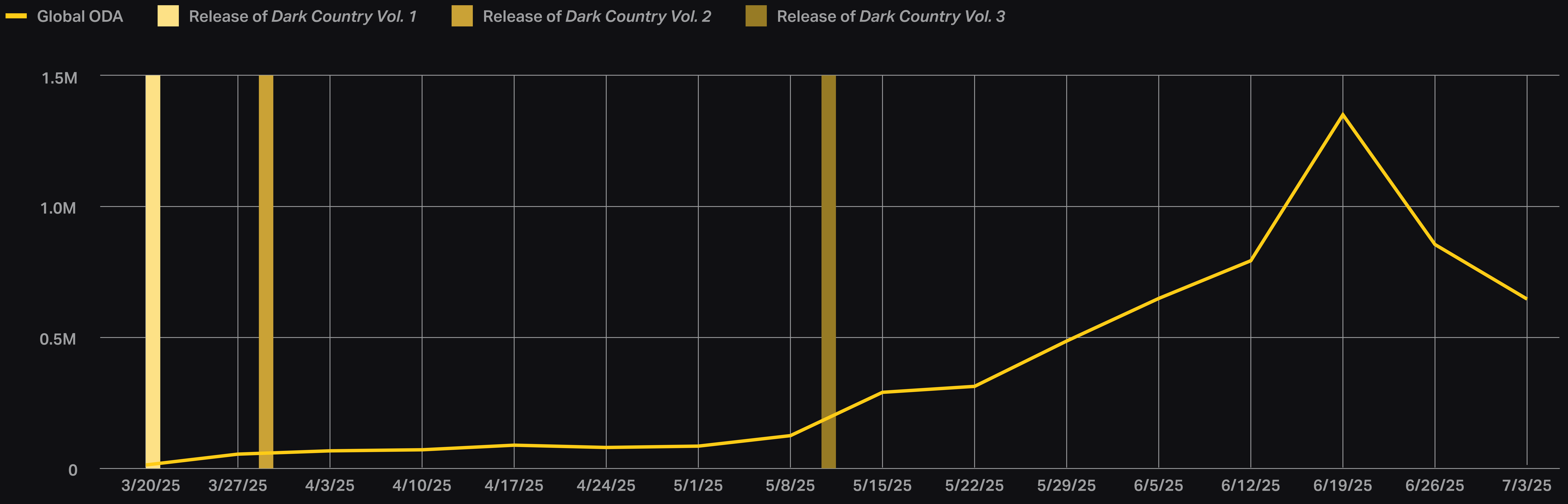
SOURCE: LUMINATE INSIGHTS ENTERTAINMENT 365

AI and Music Creation

News headlines regarding the use of AI by some artists have circulated broadly in recent weeks. Aventhis has disclosed the use of AI in public creator descriptions while driving over 5M Global On-Demand Audio streams since April 18, 2025. As such, Aventhis' YouTube channel describes his work as "a dark country project rising in the scene with gritty melodies, outlaw storytelling and a dark, cinematic tone … Harnessing the creative power of AI as part of his artistic process, Aventhis brings a bold new edge to the genre …" Learn more about the music industry's most important trends and current challenges in an upcoming Luminate special report; check out the back of this report for more details.

AVENTHIS: WEEKLY GLOBAL ON-DEMAND AUDIO STREAMS

By week-ending date



SOURCE: LUMINATE MUSIC CONSUMPTION DATA; AVENTHIS OFFICIAL YOUTUBE CHANNEL DESCRIPTION (7/3/25)

07

MIDYEAR CHARTS

LUMINATE MIDYEAR MUSIC REPORT 2025 LUMINATE MIDYEAR MUSIC REPORT 2025 LUMINATE MIDYEAR MUSIC REPORT 2025

SZA
CREDIT: ASHLEY OSBORN

Global Top 10 Countries

Ranked by Overall Streaming Volume (Total On-Demand Audio + Video)

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

Global Top 10 Songs

On-Demand Audio Streams

	Artist	Title	Audio Streams
1	Lady Gaga & Bruno Mars	“Die With a Smile”	1.920 billion
2	Rosé & Bruno Mars	“APT.”	1.624 billion
3	Billie Eilish	“BIRDS OF A FEATHER”	1.316 billion
4	Kendrick Lamar & SZA	“luther”	1.207 billion
5	Bad Bunny	“DtMF”	1.163 billion
6	Alex Warren	“Ordinary”	1.044 billion
7	Gracie Abrams	“That's So True”	1.039 billion
8	Kendrick Lamar	“Not Like Us”	0.937 billion
9	Benson Boone	“Beautiful Things”	0.925 billion
10	Bad Bunny	“BAILE INoLVIDABLE”	0.902 billion

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Top 10 Albums

Album Sales + TEA + SEA On-Demand (Audio + Video)

	Artist	Title	Total Album-Equivalent Consumption	Album Sales	Song Sales	On-Demand Audio Streams	On-Demand Video Streams
1	Morgan Wallen	*I'm the Problem*	**2.562 million**	211,000	250,000	2.953 billion	111.1 million
2	SZA	*SOS*	**1.711 million**	78,000	58,000	2.142 billion	89.5 million
3	Kendrick Lamar	*GNX*	**1.706 million**	326,000	160,000	1.788 billion	119.4 million
4	Bad Bunny	*DeBÍ TiRAR MáS FOToS*	**1.650 million**	83,000	52,000	2.014 billion	134.0 million
5	Sabrina Carpenter	*Short n' Sweet*	**1.331 million**	275,000	99,000	1.365 billion	55.4 million
6	The Weeknd	*Hurry Up Tomorrow*	**1.229 million**	495,000	34,000	0.950 billion	38.3 million
7	PARTYNEXTDOOR & Drake	*$ome $exy $ongs 4 U*	**1.229 million**	51,000	94,000	1.512 billion	61.3 million
8	Morgan Wallen	*One Thing at a Time*	**1.099 million**	25,000	53,000	1.388 billion	67.9 million
9	Lady Gaga	*MAYHEM*	**0.966 million**	238,000	180,000	0.900 billion	106.2 million
10	Playboi Carti	*MUSIC*	**0.949 million**	66,000	12,000	1.179 billion	38.1 million

TOP 10 ALBUMS (ALBUM SALES + TEA + ON-DEMAND SEA): RANKED BY EQUIVALENT ALBUM UNITS COMPRISING ALBUM SALES, TRACK EQUIVALENT ALBUMS (TEA) AND STREAMING EQUIVALENT ALBUMS (SEA). EACH UNIT = ONE ALBUM SALE, OR 10 TRACKS SOLD FROM AN ALBUM, OR 1,250 PREMIUM ON-DEMAND OFFICIAL STREAMS // 3,750 AD-SUPPORTED ON-DEMAND OFFICIAL STREAMS BY SONGS FROM AN ALBUM (UGC ON-DEMAND STREAMS NOT INCLUDED)

U.S. Top 10 Albums

Total Sales

	Artist	Title	Sales
1	The Weeknd	*Hurry Up Tomorrow*	495,000
2	Kendrick Lamar	*GNX*	326,000
3	Sabrina Carpenter	*Short n' Sweet*	275,000
4	Lady Gaga	*MAYHEM*	238,000
5	Morgan Wallen	*I'm the Problem*	211,000
6	Taylor Swift	*Lover (Live From Paris)*	206,000
7	Chappell Roan	*The Rise and Fall of a Midwest Princess*	180,000
8	Stray Kids	*HOP*	149,000
9	ENHYPEN	*DESIRE : UNLEASH*	145,000
10	*Wicked* Movie Cast, Cynthia Erivo, Ariana Grande	*Wicked: The Soundtrack*	134,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Top 10 CD Albums

Total Sales

	Artist	Title	Sales
1	The Weeknd	*Hurry Up Tomorrow*	163,000
2	Stray Kids	*HOP*	149,000
3	ENHYPEN	*DESIRE : UNLEASH*	145,000
4	ATEEZ	*GOLDEN HOUR : Part.3*	116,000
5	Sabrina Carpenter	*Short n' Sweet*	93,000
6	Lady Gaga	*MAYHEM*	83,000
7	SEVENTEEN	*SEVENTEEN 5th Album 'HAPPY BURSTDAY'*	79,000
8	Kendrick Lamar	*GNX*	75,000
9	LE SSERAFIM	*5th Mini Album "HOT"*	73,000
10	Morgan Wallen	*I'm the Problem*	71,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Top 10 Vinyl Albums

Total Sales

	Artist	Title	Sales
1	Kendrick Lamar	*GNX*	226,000
2	Sabrina Carpenter	*Short n' Sweet*	169,000
3	Taylor Swift	*Lover (Live From Paris)*	164,000
4	The Weeknd	*Hurry Up Tomorrow*	144,000
5	Lady Gaga	*MAYHEM*	122,000
6	Chappell Roan	*The Rise and Fall of a Midwest Princess*	105,000
7	Billie Eilish	*HIT ME HARD AND SOFT*	92,000
8	Tyler, The Creator	*IGOR*	91,000
9	Fleetwood Mac	*Rumours*	83,000
10	Wicked Movie Cast, Cynthia Erivo, Ariana Grande	*Wicked: The Soundtrack*	76,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Top 10 Cassette Albums

Total Sales

	Artist	Title	Sales
1	Chappell Roan	*The Rise and Fall of a Midwest Princess*	8,000
2	Soundtrack	*Guardians of the Galaxy: Awesome Mix 1*	6,000
3	Ghost	*Skeletá*	5,000
4	Soundtrack	*Guardians of the Galaxy Vol. 2*	5,000
5	Mac Miller	*Balloonerism*	5,000
6	Charli xcx	*BRAT*	4,000
7	Nirvana	*Bleach*	4,000
8	Kendrick Lamar	*GNX*	4,000
9	Sabrina Carpenter	*Short n' Sweet*	4,000
10	The Weeknd	*Hurry Up Tomorrow*	3,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Top 10 Digital Song Consumption

Songs Sales + On-Demand Audio SES*

	Artist	Song	Song Sales + SES On-Demand Audio Streams	On-Demand Audio Streams	Song Sales
1	Kendrick Lamar & SZA	"luther"	3.926 million	530.4 million	57,000
2	Lady Gaga & Bruno Mars	"Die With a Smile"	3.105 million	421.4 million	93,000
3	Kendrick Lamar	"Not Like Us"	2.825 million	368.0 million	105,000
4	Kendrick Lamar Featuring Lefty Gunplay	"TV Off"	2.721 million	370.4 million	36,000
5	Morgan Wallen	"I'm the Problem"	2.570 million	326.3 million	63,000
6	Alex Warren	"Ordinary"	2.506 million	319.3 million	110,000
7	Shaboozey	"A Bar Song (Tipsy)"	2.499 million	319.6 million	89,000
8	Drake	"NOKIA"	2.488 million	326.3 million	81,000
9	Teddy Swims	"Lose Control"	2.479 million	320.9 million	72,000
10	Chappell Roan	"Pink Pony Club"	2.428 million	303.8 million	125,000

* TOP 10 DIGITAL SONG CONSUMPTION: RANKED BY TRADITIONAL DIGITAL SONG SALES + SES UNITS, WHERE 125 PREMIUM STREAMS = ONE SONG // 375 AD-SUPPORTED STREAMS = ONE SONG; ON-DEMAND VIDEO SONG STREAMING INCLUDES OFFICIAL, SONG UGC AND NON-SONG UGC

U.S. Top 10 Songs

On-Demand Audio Streams

	Artist	Title	Audio Streams
1	Kendrick Lamar & SZA	“luther”	**530.4 million**
2	Lady Gaga & Bruno Mars	“Die With a Smile”	**421.4 million**
3	Kendrick Lamar Featuring Lefty Gunplay	“TV Off”	**370.4 million**
4	Kendrick Lamar	“Not Like Us”	**368.0 million**
5	Drake	“NOKIA”	**326.3 million**
6	Morgan Wallen	“I'm the Problem”	**326.3 million**
7	Teddy Swims	“Lose Control”	**320.9 million**
8	Shaboozey	“A Bar Song (Tipsy)”	**319.6 million**
9	Alex Warren	“Ordinary”	**319.3 million**
10	Billie Eilish	“BIRDS OF A FEATHER”	**319.1 million**

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Top 10 Songs

Programmed Audio Streams

	Artist	Title	Programmed Audio Streams
1	Teddy Swims	"Lose Control"	96.7 million
2	Shaboozey	"A Bar Song (Tipsy)"	71.2 million
3	Morgan Wallen	"I'm the Problem"	60.0 million
4	Morgan Wallen	"Smile"	54.8 million
5	Teddy Swims	"Bad Dreams"	53.9 million
6	Shaboozey	"Good News"	53.2 million
7	Post Malone Featuring Morgan Wallen	"I Had Some Help"	52.8 million
8	Teddy Swims	"The Door"	52.6 million
9	Benson Boone	"Beautiful Things"	51.9 million
10	Thomas Rhett	"Somethin' 'Bout a Woman"	49.0 million

PROGRAMMED STREAMS ARE THOSE FROM DMCA-COMPLIANT SERVICES.

U.S. Top 10 Radio Songs

Based on Audience

	Artist	Title	Audience
1	Lady Gaga & Bruno Mars	“Die With a Smile”	1.762 billion
2	Shaboozey	“A Bar Song (Tipsy)”	1.655 billion
3	Kendrick Lamar & SZA	“luther”	1.592 billion
4	Myles Smith	“Stargazing”	1.391 billion
5	Sabrina Carpenter	“Espresso”	1.372 billion
6	Billie Eilish	“BIRDS OF A FEATHER”	1.273 billion
7	Teddy Swims	“Lose Control”	1.170 billion
8	Benson Boone	“Beautiful Things”	1.164 billion
9	Morgan Wallen	“Love Somebody”	1.112 billion
10	Rosé & Bruno Mars	“APT.”	1.110 billion

SOURCE: MEDIABASE; LUMINATE METRO RADIO STREAMING

Canada Top 10 Albums

Album Sales + TEA + SEA On-Demand (Audio & Video)

	Artist	Title	Total Album-Equivalent Consumption	Album Sales	Song Sales	On-Demand Audio Streams	On-Demand Video Streams
1	Morgan Wallen	*I'm the Problem*	231,000	6,000	24,000	285.0 million	6.6 million
2	The Weeknd	*The Highlights*	151,000	1,000	5,000	200.8 million	11.2 million
3	SZA	*SOS*	137,000	2,000	3,000	181.0 million	3.7 million
4	PARTYNEXTDOOR & Drake	*$ome $exy $ongs 4 U*	133,000	3,000	8,000	169.8 million	3.8 million
5	Sabrina Carpenter	*Short n' Sweet*	131,000	12,000	9,000	155.6 million	6.2 million
6	Tate McRae	*So Close To What*	124,000	8,000	5,000	148.8 million	4.3 million
7	The Weeknd	*Hurry Up Tomorrow*	118,000	16,000	3,000	133.4 million	4.3 million
8	Kendrick Lamar	*GNX*	115,000	11,000	7,000	137.0 million	5.1 million
9	Morgan Wallen	*One Thing at a Time*	111,000	1,000	4,000	143.9 million	4.0 million
10	Noah Kahan	*Stick Season*	103,000	3,000	4,000	130.7 million	1.9 million

TOP 10 ALBUMS (ALBUM SALES + TEA + ON-DEMAND SEA): RANKED BY EQUIVALENT ALBUM UNITS, COMPRISING ALBUM SALES, TRACK EQUIVALENT ALBUMS (TEA) AND STREAMING EQUIVALENT ALBUMS (SEA). EACH UNIT = ONE ALBUM SALE, OR 10 TRACKS SOLD FROM AN ALBUM, OR 1,250 PREMIUM ON-DEMAND OFFICIAL STREAMS // 3,750 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	Lady Gaga & Bruno Mars	"Die With a Smile"	**51.7 million**
2	Alex Warren	"Ordinary"	**50.5 million**
3	Shaboozey	"A Bar Song (Tipsy)"	**49.7 million**
4	Rosé & Bruno Mars	"APT."	**47.7 million**
5	Kendrick Lamar & SZA	"luther"	**45.3 million**
6	Benson Boone	"Beautiful Things"	**44.9 million**
7	Gracie Abrams	"That's So True"	**44.6 million**
8	Drake	"NOKIA"	**40.2 million**
9	Chappell Roan	"Pink Pony Club"	**40.1 million**
10	The Weeknd & Playboi Carti	"Timeless"	**39.5 million**

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Share of Total Volume by Format and Genre

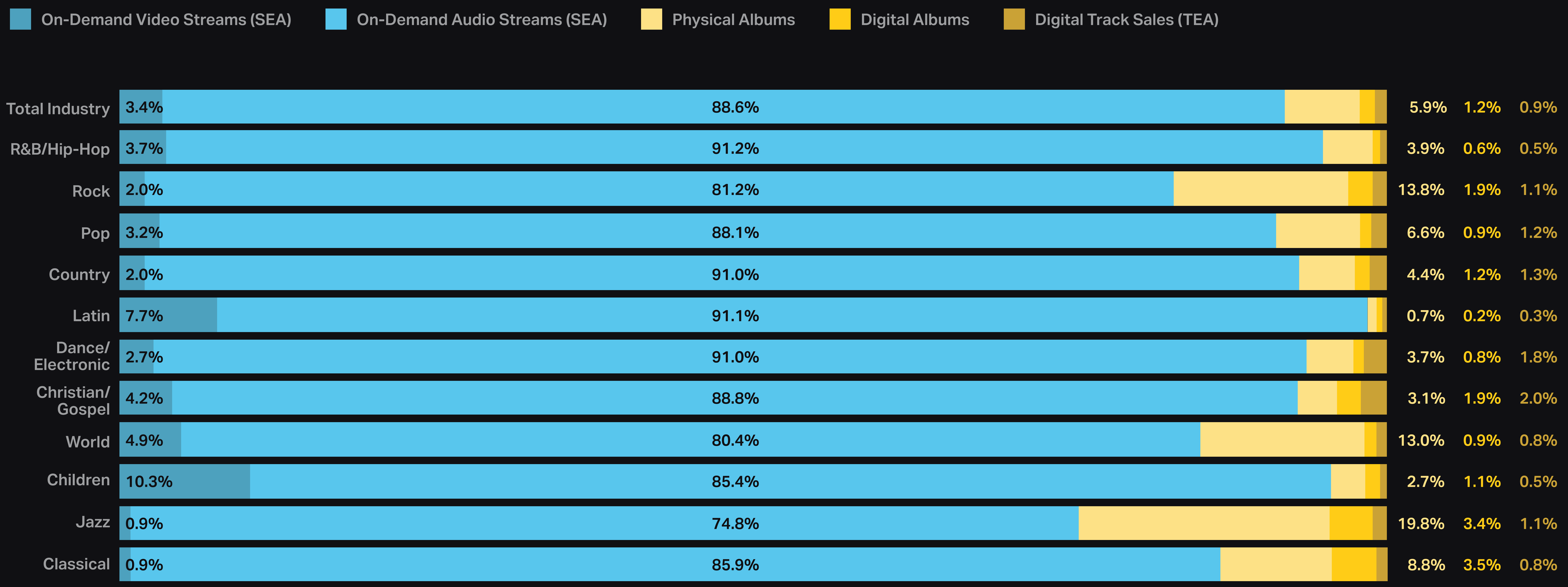
Selected Top Genres

	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	23.8%	24.7%	24.6%	26.4%	15.3%	15.9%	12.4%	14.4%
2	Rock	19.6%	17.2%	17.7%	10.9%	43.5%	45.7%	32.4%	22.9%
3	Pop	12.1%	11.9%	12.0%	10.9%	12.8%	13.5%	9.3%	16.5%
4	Country	8.9%	8.6%	8.9%	5.1%	7.1%	6.7%	9.3%	12.4%
5	Latin	7.8%	9.3%	8.5%	17.7%	1.0%	0.9%	1.5%	2.7%
6	Dance/Electronic	3.3%	3.3%	3.4%	2.5%	2.1%	2.1%	2.3%	6.4%
7	World Music	2.1%	2.0%	2.0%	2.9%	4.1%	4.6%	1.6%	1.9%
8	Christian/Gospel	2.0%	2.0%	2.0%	2.5%	1.4%	1.1%	3.3%	4.4%
9	Children	1.2%	1.3%	1.1%	3.2%	0.6%	0.5%	1.2%	0.7%
10	Jazz	0.9%	0.7%	0.7%	0.2%	2.9%	3.0%	2.6%	1.1%
11	Classical	0.9%	0.7%	0.8%	0.2%	1.5%	1.3%	2.6%	0.8%

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

U.S. Share of Total Album-Equivalent Consumption

By Format



SOURCE: LUMINATE MUSIC CONSUMPTION DATA

Methodology & FAQ

EXPORT POWER

The Luminate Export Power Score 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.

NEW METRIC: INTERACTIVE STREAMS

Interactive streams are On-Demand Audio streams from interactive (gaming) platforms that allow users to choose their own music and engage with songs as part of the experience. These can be ad-supported or premium and are presented in this report for the first time.

DATA ENRICHMENT

Data enrichment brings together stats from the top recordings of the year and information about the songwriters of those recordings. This analysis is based on the top 1,000 songs worldwide ranked by On-Demand Audio streams from Week 1 to Week 45 of 2024. Tracks often have multiple songwriters, so the counts of songwriter and streams are based on a one-to-many relationship. Any recordings that did not have associated songwriter information were excluded from the analysis.

LUMINATE INDEX

The Luminate Index is a composite metric meant to provide labels, brands and agencies with an understanding of the depth, breadth and affinity of an artist's fandom among U.S. consumers. The five unique components (streaming, social media footprint, awareness, public perception and fan engagement) all contribute to the composite score, with some components lending more or less to the score than others.

Methodology & FAQ

WHAT DETERMINES A SUPER FAN?

A super fan 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 SHAREPOINT CHANGE?

Within this report, there are references to “sharepoint change.” An example of this is in the “Highest-Growth Genres” section, where Rock shows a .35 gain relative to other genres. Sharepoint 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.

WHAT ARE THE TREND BREAKS IN 2025?

Independent Retail Physical Sales: This Midyear Music Report includes U.S. physical sales for independent retailers using modeled data. Luminate updated its reporting methodology for independent retail sales in 2024. In this report, modeled data from Luminate’s next-generation CONNECT platform replaces unmodeled data found in Music Connect for H1 2024. This new data is only available through the CONNECT platform.

Video: A change in provider reporting was made in January 2024 that affects the Non-Song UGC category. Thus, we are unable to provide video trending. All video numbers represented in this report are either standalone snapshots in time or do not include the impact of the Non-Song UGC changes. These instances are noted throughout.

Data Sources

This 2025 Midyear Music Report is powered by Luminate's industry-leading data used by entertainment executives, investors, brand leaders and technology visionaries. For more information or to inquire about accessing the data, please visit luminatedata.com.

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. 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.

U.S. MUSIC 360 & GLOBAL MUSIC 360

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

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.

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.

STREAMING VIEWERSHIP MODEL (SVM)

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.

LEARN MORE ABOUT THE MUSIC INDUSTRY'S MOST IMPORTANT TRENDS IN A LUMINATE SPECIAL REPORT RELEASING AUG. 1

Available for purchase here for just $499

- The major labels' shift in focus from streaming user growth to "Super Fans"
- How music publishing revenues surpassed the global film box office
- Where live music stands amid record-high ticket prices and economic uncertainty

THE STATE OF THE MUSIC INDUSTRY 2025

Like other entertainment fields this year, the music industry finds itself in uncharted territory.

Business is booming, but the days of riding post-pandemic demand to record revenues are ending. Streaming usership in major markets is approaching critical mass, prices for live music are exceeding audience budgets, music publishing's revenue streams are endangered by the rise of AI, and musicians' ability to live off of music is more tenuous than ever. The last time music's leaders got too comfortable, the MP3 and Napster caught them off-guard, and the industry cratered. To this day, the value of music hasn't recovered.

This year presents an inflection point: To keep growing, the industry needs to regain the value music lost and protect itself from losing value further.

This Luminate special report, "Key Changes in the Music Industry," lays out the solutions being implemented to keep the margins moving upward: more price tiers, more Super Fan experiences, more venues, more AI protections, more acquisitions and so on.

These initiatives will mostly benefit the top-of-the-ladder companies implementing them. Others will have a profound impact — good and bad — on the smaller, independent corners of the industry.

Either way, the music business is on the cusp of change. This report offers a comprehensive overview of where the industry stands — and hopefully informs those who will determine where it's going.

LUKE COMBS

CREDIT: MICHAEL BUCKNER

BAD BUNNY

CREDIT: CHRISTOPHER GREGORY-RIVERA

MIDYEAR MUSIC REPORT

/2025

IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT US HERE.

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