



BAD BUNNY

# YEAR-END YE

# C MUSIC

YEAR-END MUSIC REPORT  
/2025

# /2025



ALEX WARREN

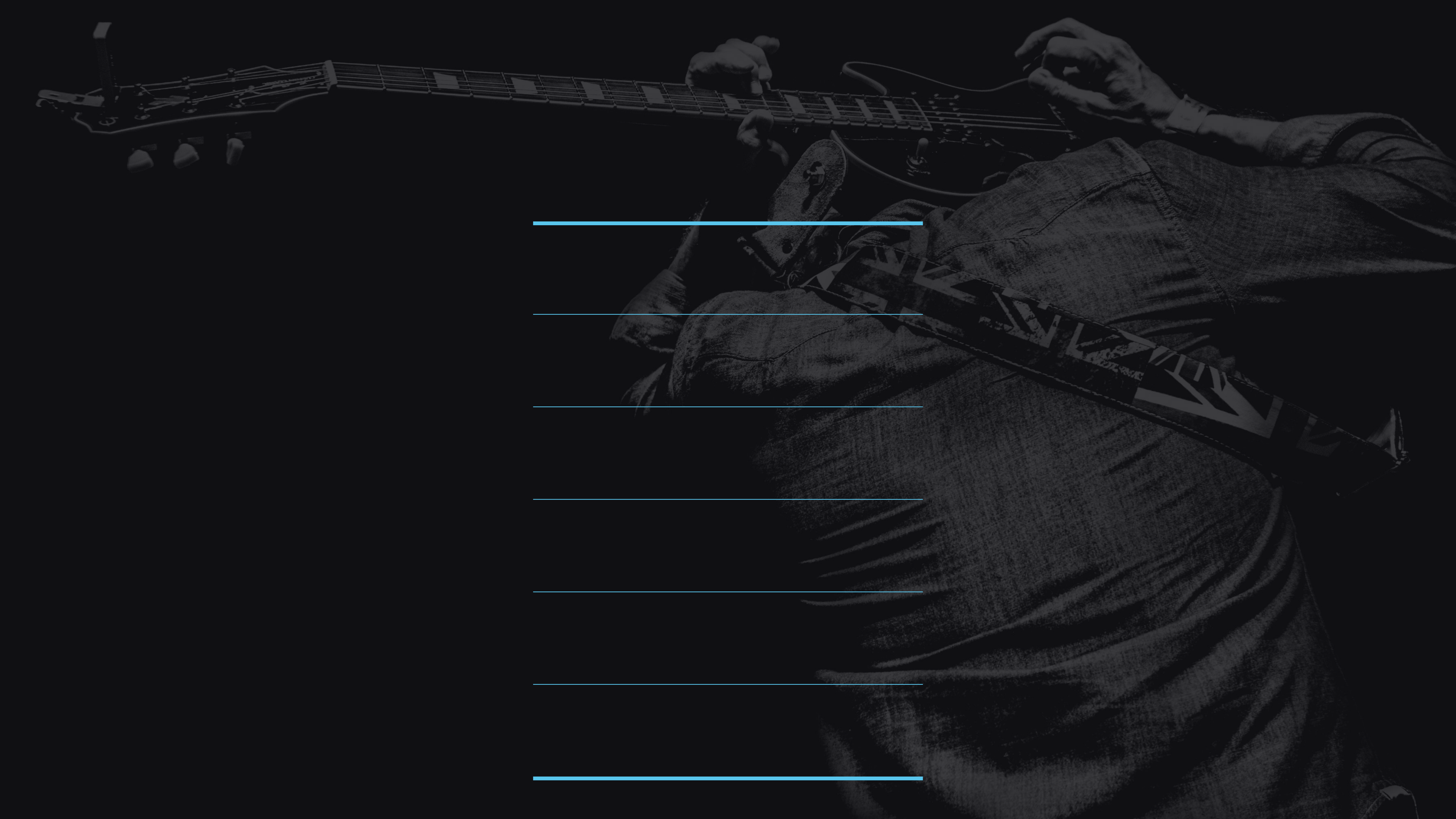
**LUMINATE**



SABRINA CARPENTER

# REPORT







YEAR-END MUSIC REPORT BY LUMINATE —2025  
CONSUMPTION METRICS & VITAL STATS  
PREMIUM PRICING  
TRANSMEDIA LANDSCAPE  
EVOLVING FANDOM  
AI ARTISTS  
YEAR-END CHARTS

ON THE COVER:  
BAD BUNNY, JOHN NACION;  
ALEX WARREN, CHRISTOPHER POLK;  
SABRINA CARPENTER, DAVID LACHAPELLE

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# INTRODUCTION

To many, 2025 might have looked like the year the music industry finally slowed its pace, but through the lens of our data at Luminate, we saw a year where the industry shifted into another gear. We are incredibly proud to share our *2025 Year-End Music Report*, a project that represents far more than just a collection of statistics.

Over the past 12 months, we watched our industry undergo a fundamental shift as we moved away from the decade-long “growth at all costs” mentality that marked the early streaming era. In its place, we witnessed the rise of a more sophisticated, intentional and data-driven era in which music is defined not just by a stream but by its deep integration into the total global entertainment experience.

2025 in music was defined by a paradox: While global On-Demand Audio (ODA) streaming continued to climb, reaching a +9.6% growth rate, the domestic U.S. market began to show unmistakable signs of a mature market slowdown. Early forecasts suggested the year’s metrics might struggle to match the historic peaks of Taylor Swift’s *The Tortured Poets Department* 2024 rollout, and then the October release of her *The Life of a Showgirl* shattered those expectations.

The album made history by earning over 4 million equivalent album units in its first week in the U.S. alone, surpassing the debut of *Tortured Poets* and becoming the biggest album release in music history. This achievement proved that, even in a mature market, the ceiling for engagement is still rising. Beneath these top-line numbers, we discovered a vibrant and diversifying landscape where Rock and Christian/Gospel led U.S. genre growth, and international markets including Japan and Brazil emerged as the new engines of premium streaming acceleration.

### The Shift to Entertainment Intelligence

The structure of this report reflects the core mission at Luminate, as we look to provide a holistic view of entertainment intelligence, keeping pace with industry shifts and evolution. We are no longer just tracking plays; we are mapping the Transmedia Landscape, evaluating the Evolving Fandom funnel and monitoring the disruptive entry of AI Artists into the mainstream charts.

Our report is organized into five core pillars:

- 1. Consumption Metrics & Vital Stats:** A deep dive into the more than 100,000 ISRCs delivered to DSPs daily and the streaming surge of Q3 2025
- 2. Premium Pricing & ARPU:** An analysis of how major platforms such as Spotify and Amazon Music have navigated price increases while converting ad-supported users into high-value premium subscribers
- 3. Transmedia Integration:** How music now lives across film, TV and gaming, as exemplified by the massive global impact of Netflix’s *KPop Demon Hunters* and Ariana Grande’s role in *Wicked*
- 4. Global Fandom:** A study of Import/Export power rankings, identifying how local culture in markets including Nigeria and South Korea is influencing global listening habits
- 5. The AI Frontier:** A look at the commercial success of AI entities such as Xania Monet and the complex consumer sentiment surrounding generative music





**The Transmedia Ecosystem**

In 2025, the streaming-only era was officially left behind. Discovery is no longer a linear path, and Luminate data shows that the most successful artists are those who inhabit multiple spaces simultaneously. We saw the Transmedia Artist emerge as a dominant force this year. Whether it was the legacy catalog of Led Zeppelin finding a sustained 16% streaming lift through a Netflix documentary or Ariana Grande bridging the gap between Broadway and the global charts in *Wicked*, the cross-platform surge is the new standard for success.

This evolution extends into the digital frontier, where gaming platforms such as Fortnite have become as critical to a release strategy as a radio campaign once was. By analyzing the interplay between different media, we can see that a successful sync or virtual performance doesn’t just provide a momentary spike, it creates a lasting uplift in catalog consumption that can sustain an artist’s career for years. Music has become a pervasive force that powers every other form of media, making the stream just one small part of a much larger narrative.

**The AI Reckoning**

Throughout this year, I have asked many in the music industry two questions: When will an AI artist reach #1 on the Billboard Hot 100, and do you care? The answers I’ve received are as varied as the data points we track. And then, in September 2025, a reported \$3 million advance for AI creation Xania Monet gave a wake-up call to many.

We are seeing the birth of performers who can exist in a thousand places at once, blurring the lines between technology and talent. Xania Monet didn’t just exist in a lab, she made history as the first AI-generated artist to appear on a *Billboard* radio airplay chart, reaching the Top 30 on the Adult R&B Airplay chart with “How Was I Supposed to Know?”

However, our research at Luminate suggests that caring is exactly what the audience is doing. A significant portion of listeners are still looking for that irreplaceable human spark, as 45% expressed discomfort with AI being used for original compositions.

Moving forward, the debate won’t be just about when AI artists reach the top of the Billboard Hot 100 but also whether audiences will grant them the same cultural permission we give to human creators. Protecting the inherent value of human creation in a world of infinite content is our industry’s most vital challenge. In the coming months, Luminate will continue to provide clarity on the scale and impact of AI-generated music on the industry.

**A Roadmap for 2026**

Looking to the year ahead, the path to success is no longer about wide, shallow reach. It requires a deep understanding of how music interacts with film, gaming, regional cultures and the evolving habits of a modern audience. This report is designed to be your roadmap through that complexity. Whether you are navigating the nuances of the 19th consecutive year of U.S. vinyl growth or exploring the vast potential of the Middle Eastern and African markets, I hope these insights provide you with the same sense of excitement and clarity that they have given me, as we head into another year for the music industry.

Rob Jonas  
CEO, Luminate



# ABOUT LUMINATE

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





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# CONSUMPTION METRICS

1/3/25-1/1/26 vs. 1/5/24-1/2/25





# Global Metrics

2024\* 2025\*

## GLOBAL ON-DEMAND AUDIO SONG STREAMS



+9.6%  
Volume Change

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



+11.6%  
Volume Change

\*1/3/25-1/1/26 (AS COMPARED TO 1/5/24-1/2/25) / SOURCE: LUMINATE CONSUMPTION DATA / NOTE: WHILE 2025 HAD THE STANDARD 52 CHART WEEKS, 2024 HAD 53. THE METRICS IN THIS SECTION FOR 2025 ARE COMPARED AT AGAINST 2024 WEEKS 2-53 TO ACHIEVE CALENDAR SYNC. READ MORE IN THE METHODOLOGY SECTION.



# U.S. Metrics

2024\* 2025\*

## U.S. TOTAL ALBUM CONSUMPTION<sup>+</sup> (ALBUM + TEA + SEA ON-DEMAND AUDIO)\*\*



+4.8%  
Volume Change

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



+4.6%  
Volume Change

## INTERACTIVE SONG STREAMS (H2 2025)\*\*\*



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



+4.6%  
Volume Change

## TOTAL ALBUM SALES<sup>+</sup> (PHYSICAL + DIGITAL)



+2.6%  
Volume Change

## DIGITAL ALBUM SALES



-15.9%  
Volume Change

## PHYSICAL ALBUM SALES<sup>+</sup> (LP, CD AND CASSETTE)



+6.5%  
Volume Change

\*U.S. PHYSICAL SALES METRICS INCLUDE MODELED INDEPENDENT RETAIL NUMBERS. SEE METHODOLOGY AND FAQ SECTION AT THE BACK OF THIS REPORT FOR MORE / \*\*SEA (STREAM-EQUIVALENT ALBUMS): 1250 PREMIUM STREAMS = ONE ALBUM // 3750 AD-SUPPORTED STREAMS = ONE ALBUM; TEA (TRACK-EQUIVALENT ALBUMS): 10 DIGITAL TRACKS = ONE ALBUM / \*\*\*NEW METRIC: INTERACTIVE ON-DEMAND. SEE METHODOLOGY AND FAQ SECTION AT THE BACK OF THIS REPORT FOR MORE / \*1/3/25-1/1/26 (AS COMPARED TO 1/5/24-1/2/25) / SOURCE: LUMINATE CONSUMPTION DATA



# Canada Metrics

2024\* 2025\*

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



+4.1%  
Volume Change

## CANADA TOTAL ALBUM SALES (PHYSICAL + DIGITAL)



-2.1%  
Volume Change

## CANADA ON-DEMAND AUDIO SONG STREAMS



+4.6%  
Volume Change

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



+3.7%  
Volume Change

\*1/3/25-1/1/26 (AS COMPARED TO 1/5/24-1/2/25) \*\*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



# VITAL STATS

Behind the global consumption activity numbers lies a slate of vital metrics and KPIs that further define today's global music business: the number of daily ISRCs, global track streaming pyramid, release age listening and the highest growth genres help lay the foundation for this year's trends.



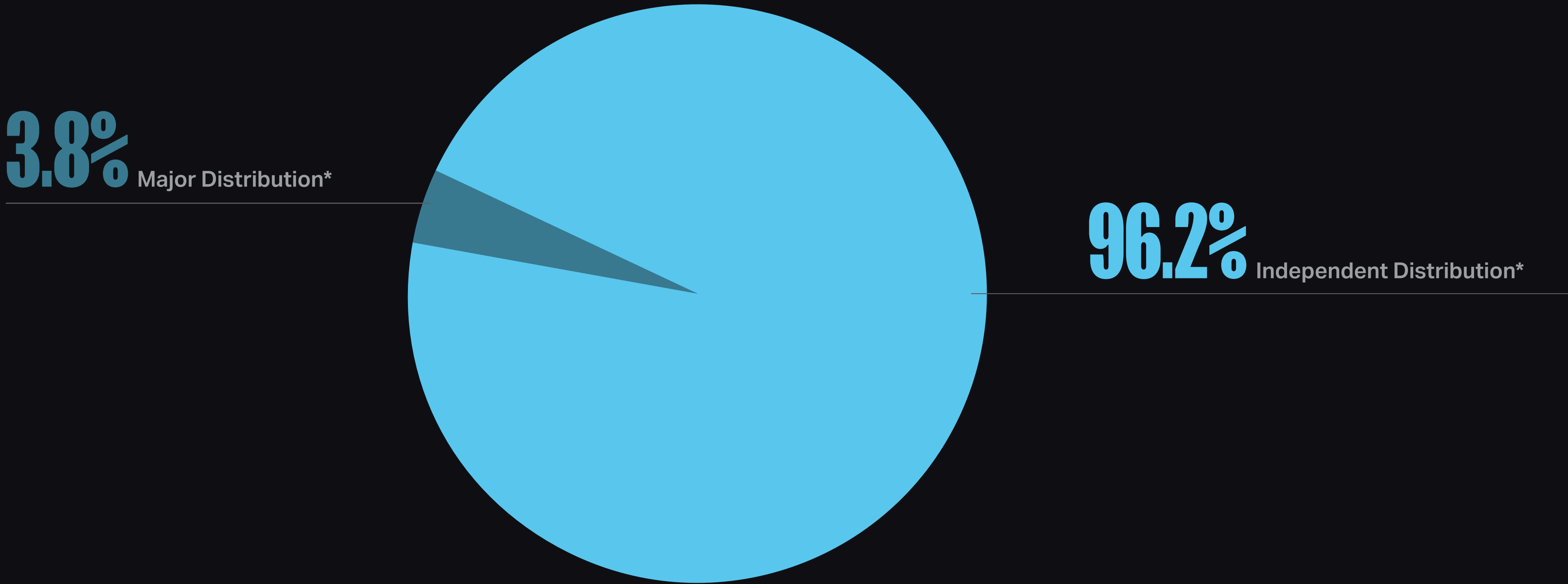
# Average Daily ISRC Delivery to DSPs

106K ISRCs\*\* were delivered to DSPs (digital service providers like Spotify, Apple Music, YouTube et al.) each day in 2025, a +7% increase over the 99K daily average in 2024. The share of major distribution is down from 8% in 2024, signaling that ISRC growth is coming from the independent and DIY distribution sector.



SHABOOZEY

CREDIT: GILBERT FLORES

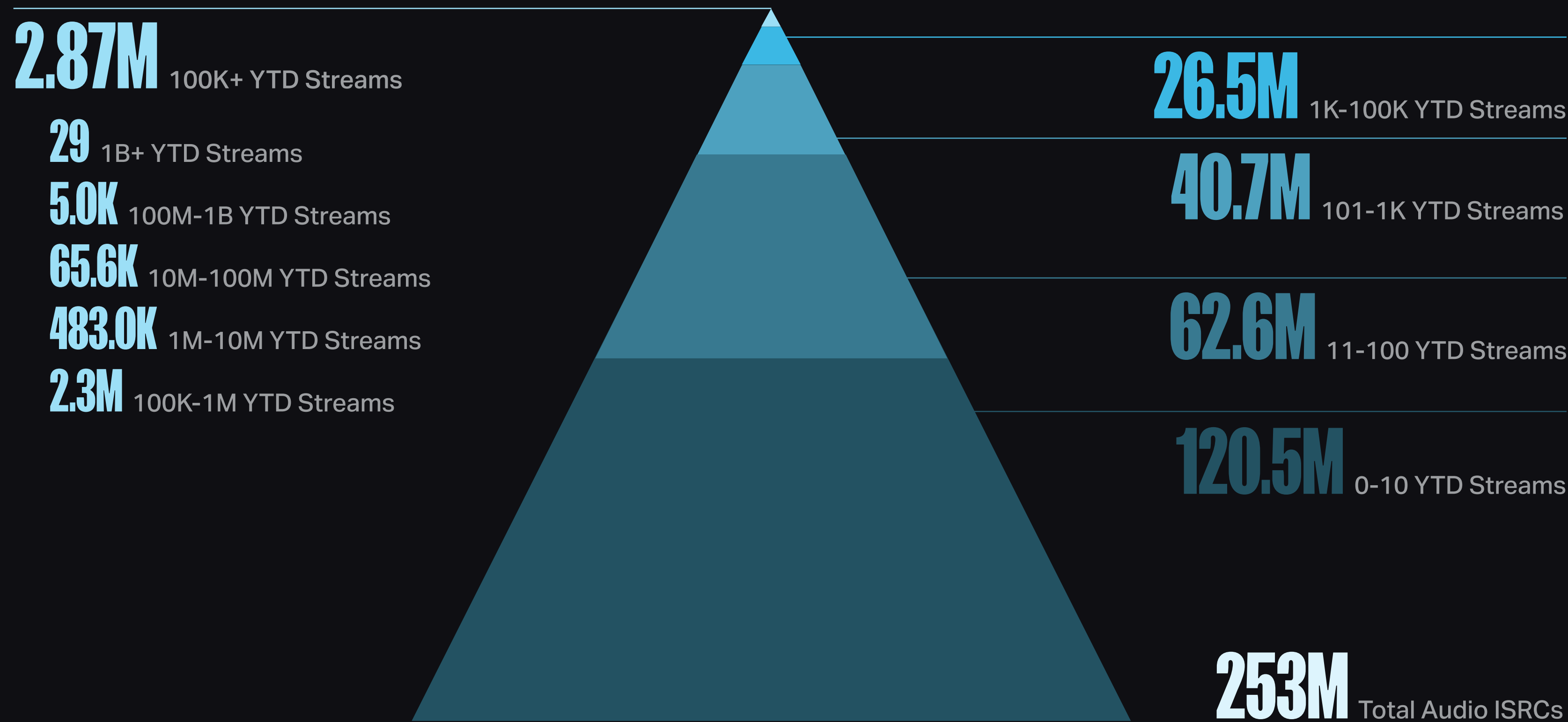


\*MAJOR DISTRIBUTION INCLUDES UNIVERSAL MUSIC GROUP, SONY MUSIC ENTERTAINMENT, WARNER MUSIC GROUP AND THEIR AFFILIATED DISTRIBUTION ARMS (VIRGIN, THE ORCHARD, ADA, ET AL) / \*INCLUSIVE OF INDEPENDENT DISTRIBUTION AND DSPS THAT CATER TO CREATOR NETWORK; \*\*ISRC IS THE INTERNATIONAL STANDARD RECORDING CODE, SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# 2025 Global Audio Track Streaming Pyramid

While 86% of the net ISRC growth this year (+37.9M vs 2024) is concentrated in tracks with 100 audio streams or less.... 1.9M more tracks (ISRCs) reached 1K streams in 2025 compared to 2024. An additional 6.8K tracks reached at least 10M streams. 1K more tracks reached 50M+ streams in 2025, though there were 2 less to reach 1B. 88% of tracks (or approx. 1 in 10) had 1K streams or less.



SOURCE: LUMINATE MUSIC DATA ENRICHMENT

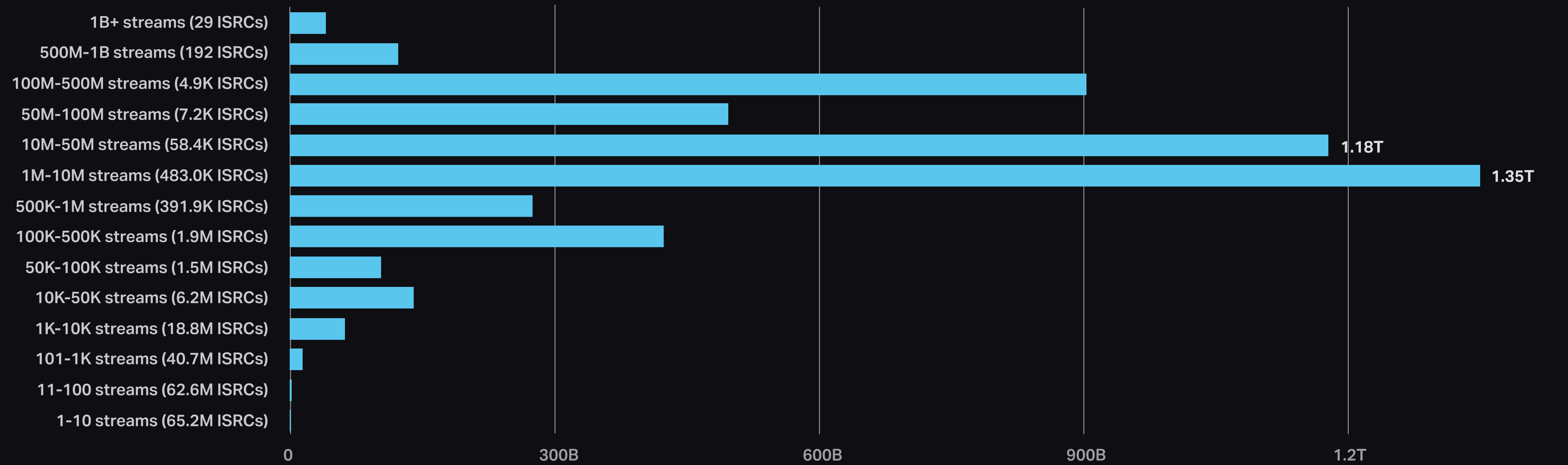


# Volume of Global On-Demand Audio Streaming by Tier

When analyzing the streaming volume that each tier has in the pyramid, tracks between 1M-50M Global audio streams make up 49.4% of all streaming, emphasizing that these 541K tracks make up the backbone of global music consumption.

## GLOBAL ON-DEMAND AUDIO STREAMING BY TIER

FY 2025



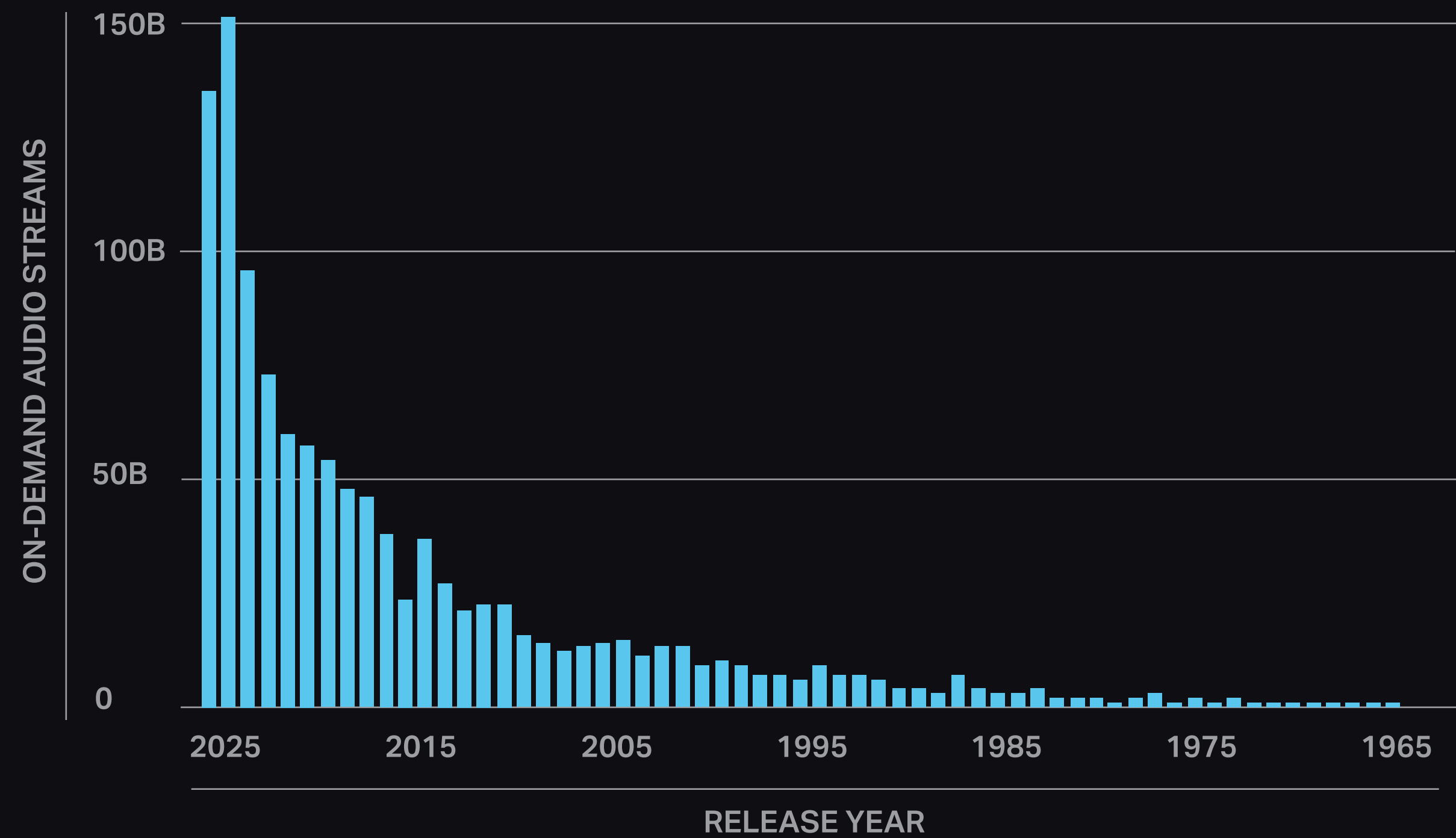
SOURCE: LUMINATE MUSIC CONSUMPTION DATA



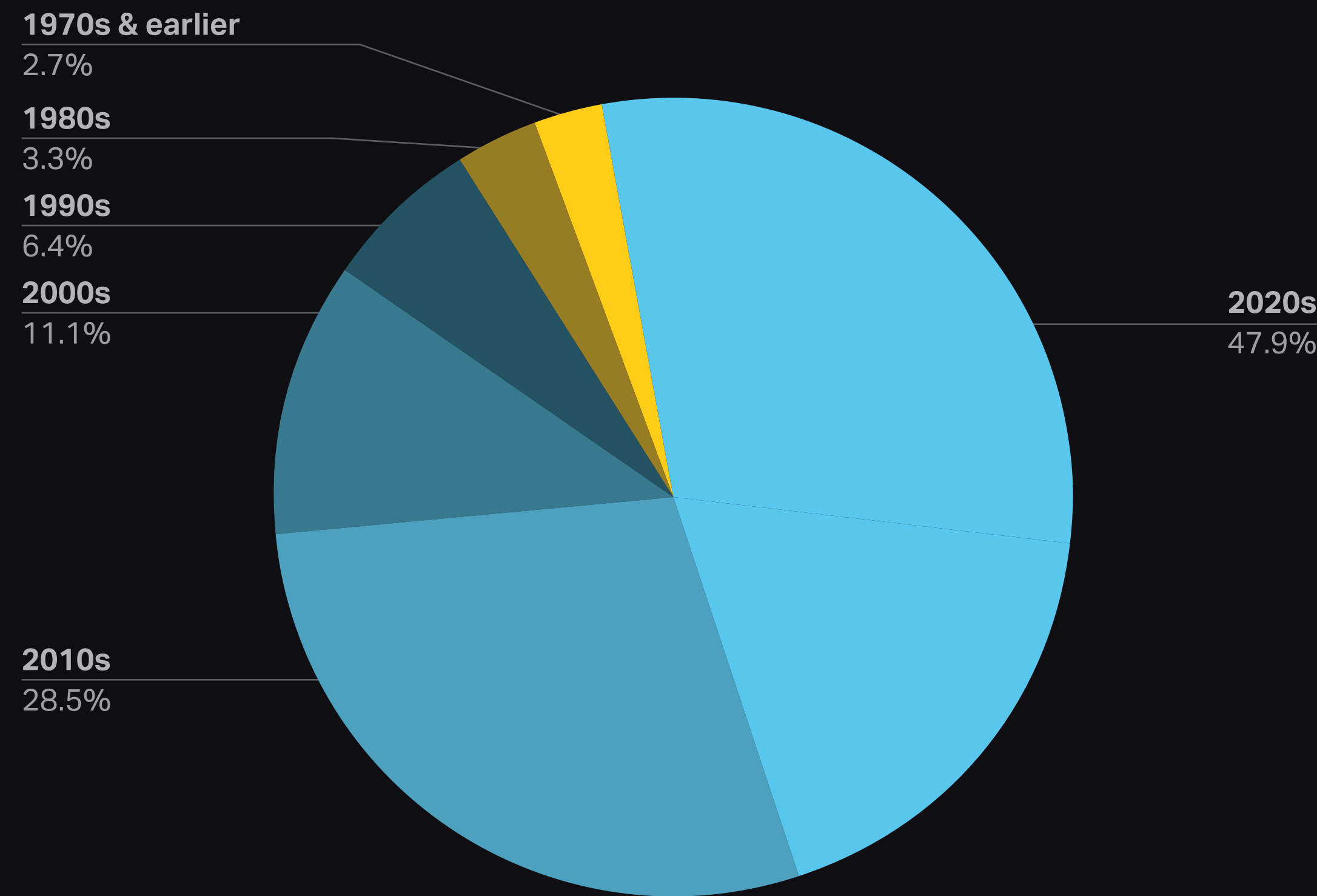
# Release Age Listening

43% of U.S. On-Demand Audio Streams are from tracks released in the last five years (2021-2025); Nearly half of U.S. ODA streams are from songs released in the 2020s, which is down slightly from the 49.6% share held by the most recent five year period noted in 2024. This continues the narrative of Current streaming volume being down slightly in 2025 and top ranking songs carrying release dates from 2024 or earlier.

U.S. ON-DEMAND AUDIO STREAMS, BY RELEASE YEAR



U.S. ON-DEMAND AUDIO STREAMS, BY RELEASE DECADE



SOURCE: LUMINATE MUSIC CONSUMPTION DATA; BASED ON TOP 500K U.S. ON-DEMAND AUDIO TRACKS



## U.S.: Top Songs in 2025, by Release Decade

Short-form video platforms are a key driver in the success of many catalog songs. Fleetwood Mac’s “Dreams” remains in the Top 30 of all audio streaming songs in the U.S. five years after its viral trend captured the public’s attention in 2020. Meanwhile, the Goo Goo Dolls’ “Iris” connected with global listeners this year after its inclusion in the 2024 film *Deadpool & Wolverine* and the subsequent short-form video trend that formed. The song ranked #47 in the U.S. and #22 globally. Consumer research shows that 36% of U.S. rock fans (those who listen weekly) discovered music through short-form video in 2025, which is 20% higher than the rate noted last year.



Song Title	Artist	Release Date	Release Decade	U.S. ODA	Overall U.S. Rank
“Fortunate Son”	Creedence Clearwater Revival	11/02/1969	1960s	136.7M	475
“Dreams”	Fleetwood Mac	07/07/1977	1970s	387.4M	28
“Don’t Stop Believin’”	Journey	01/01/1981	1980s	263.0M	81
“Iris”	The Goo Goo Dolls	04/01/1998	1990s	337.9M	47
“Mr. Brightside”	The Killers	06/07/2004	2000s	272.1M	75
“Tennessee Whiskey”	Chris Stapleton	12/29/2014	2010s	306.7M	60
“Ordinary”	Alex Warren	02/07/2025	2020s	746.8M	1

SOURCE: LUMINATE INSIGHTS MUSIC 360 (U.S.), LUMINATE MUSIC CONSUMPTION DATA



# U.S. Core Genre Trends in 2025

The Top 10 core genres remain the same as at the midyear point in 2025, with 1 in 4 streams being R&B/ Hip-Hop. After dropping to 8th in rank at the midyear point, World Music moves to 7th on the strength of releases from artists such as TWICE (whose song “Strategy” was featured in the Netflix film *KPop Demon Hunters*) and Stray Kids (whose album *KARMA* and EP *DO IT* both reached #1 on the Billboard 200).

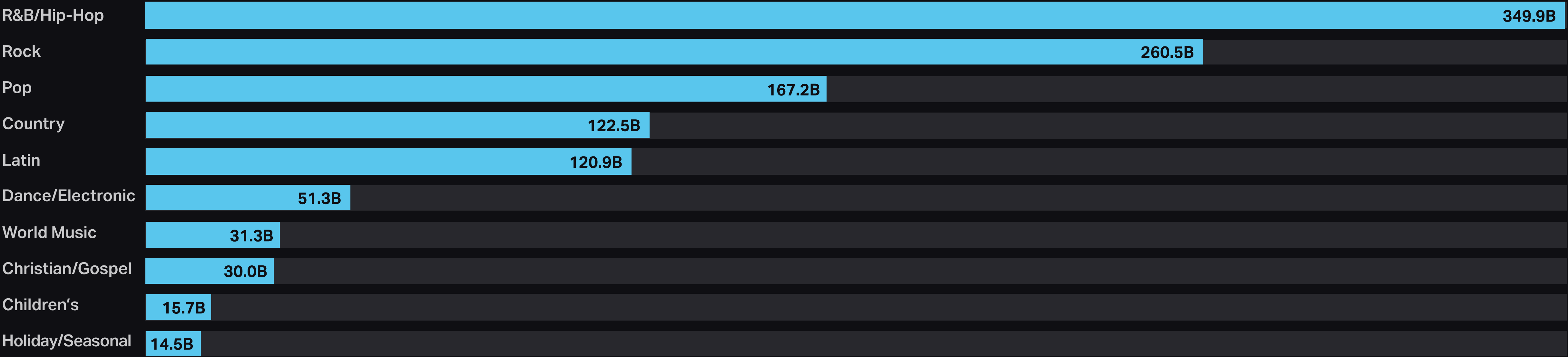


SZA

CREDIT: ASHLEY OSBORN

## TOP U.S. MAIN GENRES, 2025

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



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# U.S. Core Genre Trends in 2025

Rock (+6.4% year-over-year on-demand audio volume change), Christian/Gospel (+18.5%) and Latin (+5.2%) grew their share of the U.S. audio streaming pie the most in 2025.

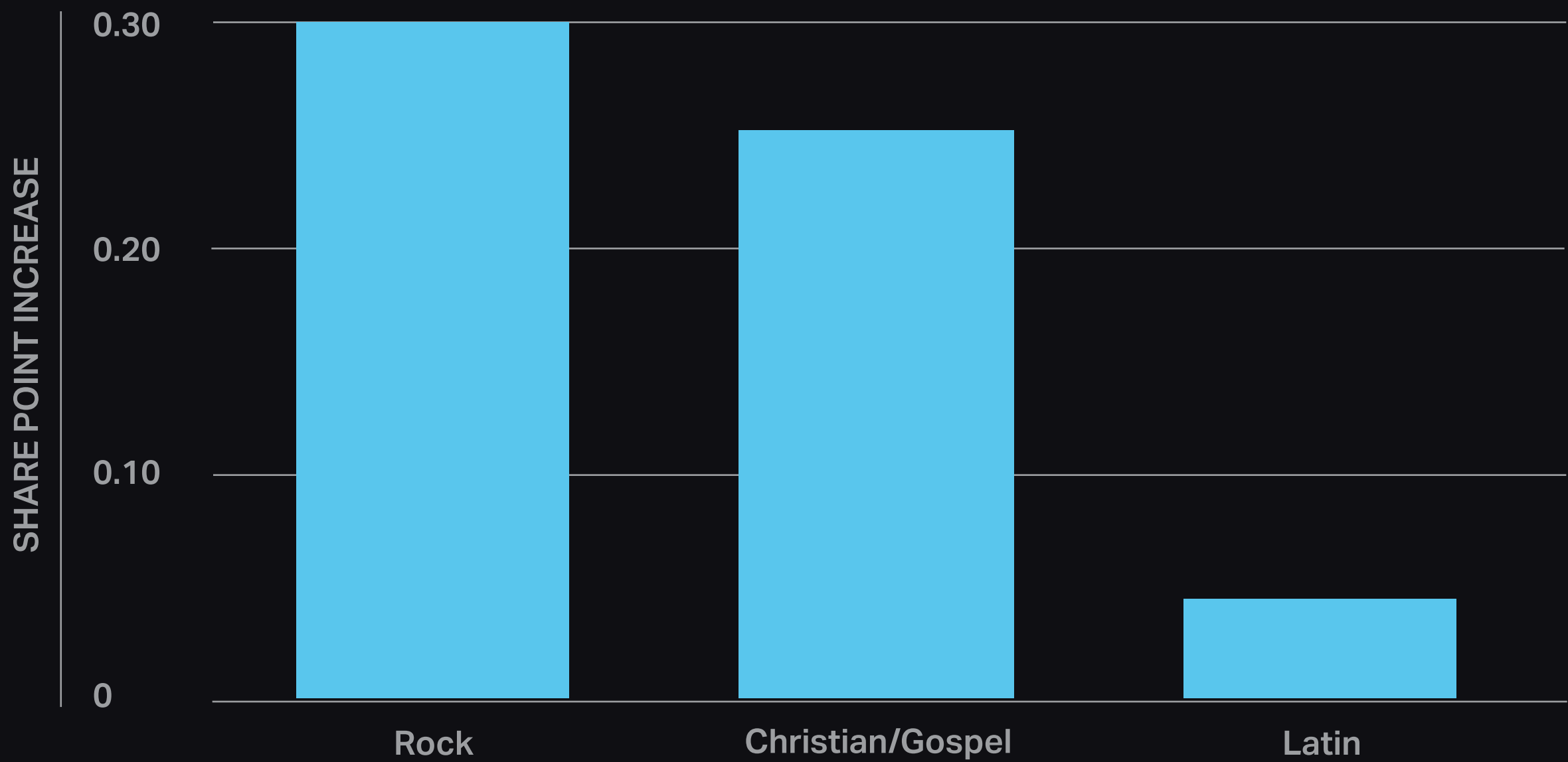


SOMBR

CREDIT: CHRISTOPHER POLK

## HIGHEST-GROWTH GENRES IN THE U.S.

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



**+.30**

Rock grew its piece of the audio streaming pie the most in 2025, increasing +.30 sharepoints over last year.

**+.04**

Bad Bunny helped drive Latin to +.04 more points (or +6B audio streams) over last year.

**+.25**

Christian/Gospel accelerated its growth in 2025, increasing another +.25 share points after gaining +.12 points in 2024.

**14.0B**

In 2025, 14B audio streams is equal to 1% of the U.S. industry.

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# Vital Stats for the Highest-Growth Genres

Key figures to know for each of the highest-growth genres in the U.S.: Rock, Christian/Gospel, Latin

ROCK

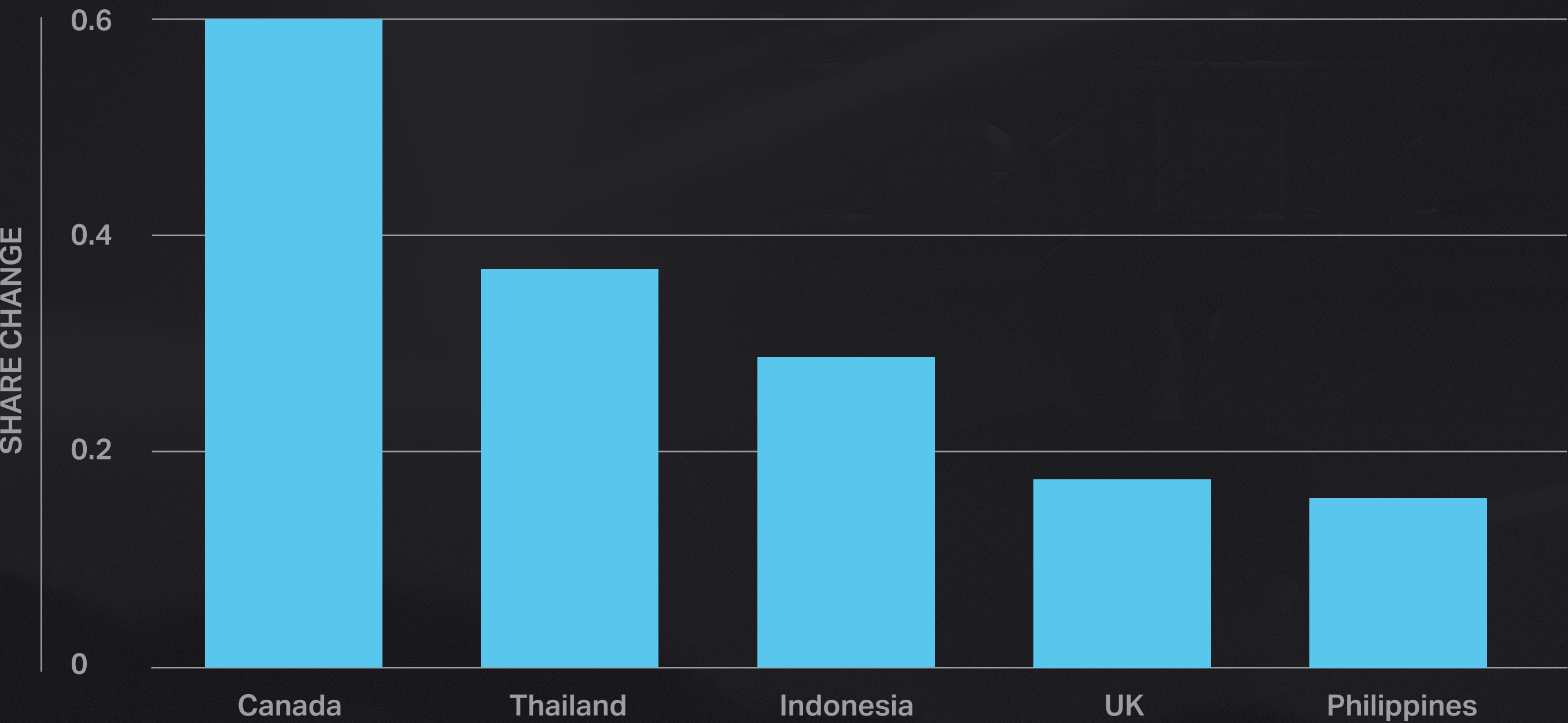
CHRISTIAN/GOSPEL

LATIN



## ROCK'S LARGEST GROWTH MARKETS OUTSIDE NORTH AMERICA ARE IN ASIA

2025 vs. 2024 Market-level Share Point Change; Total On-Demand (Audio + Video) Streams



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# Vital Stats for the Highest-Growth Genres

Key figures to know for each of the highest-growth genres in the U.S.: Rock, Christian/Gospel, Latin

ROCK

CHRISTIAN/GOSPEL

LATIN



## TOP CHRISTIAN/GOSPEL SONGS

The presence of Christian/Gospel songs grows at key tiers in the U.S.  
Ranked by U.S. On-Demand Audio streams

SONG TIER	2024	2025
Top 500	0	3
Top 1K	1	5
Top 5K	39	67
Top 10K	126	175

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# Vital Stats for the Highest-Growth Genres

Key figures to know for each of the highest-growth genres in the U.S.: Rock, Christian/Gospel, Latin

ROCK

CHRISTIAN/GOSPEL

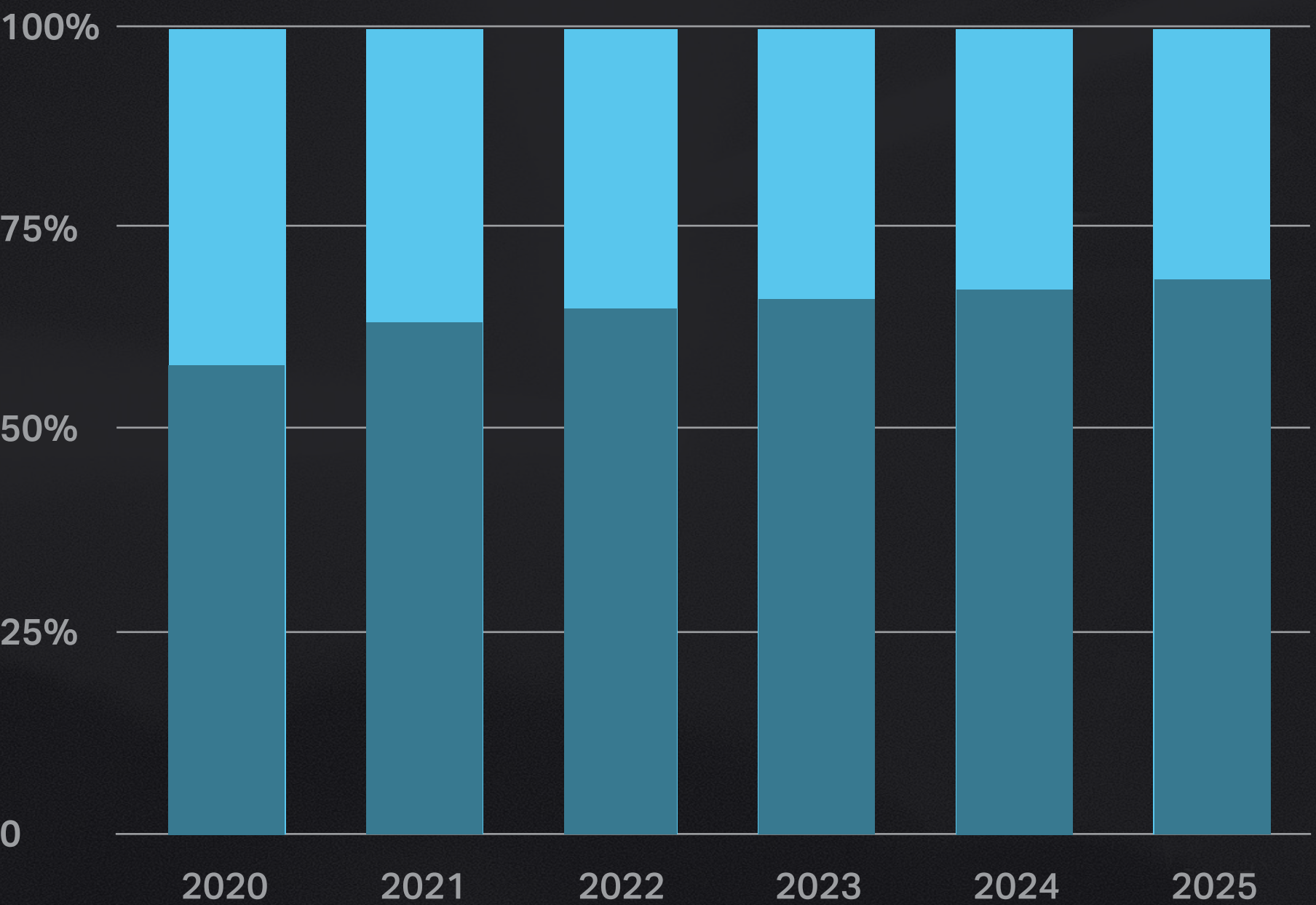
LATIN



## LATIN'S PREMIUM & AD-SUPPORTED SHARE BY YEAR

Latin Billboard main genre, U.S. Total On-Demand Streams (Audio + Video)

Ad-Supported Share Premium Share



70%

Over the last 5 years, U.S. Latin premium streaming has grown its share of genre activity from 58% in 2020 to 70% in 2025.

SOURCE: LUMINATE MUSIC CONSUMPTION DATA

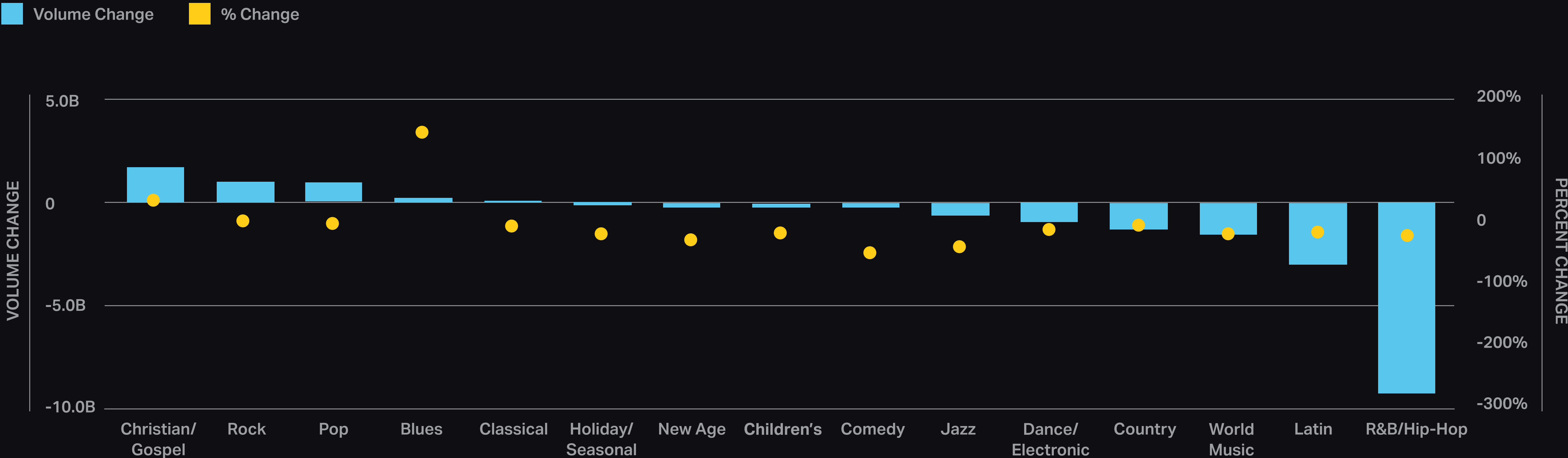


# U.S. Current Music

In Luminate’s *Midyear Music Report* published after the close of Week 26, 2025, we noted that U.S. On-Demand Audio streaming of Current music (identified as tracks that are 18 months old or newer) declined 3.3% compared with the first half of 2024. While Current audio streaming is still down, it now sits at -1.6% in volume compared with 2024 (334.0B vs. 339.3B) due to a more robust second half of 2025.

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

Main genre On-Demand Audio, FY 2025 vs. 2024



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



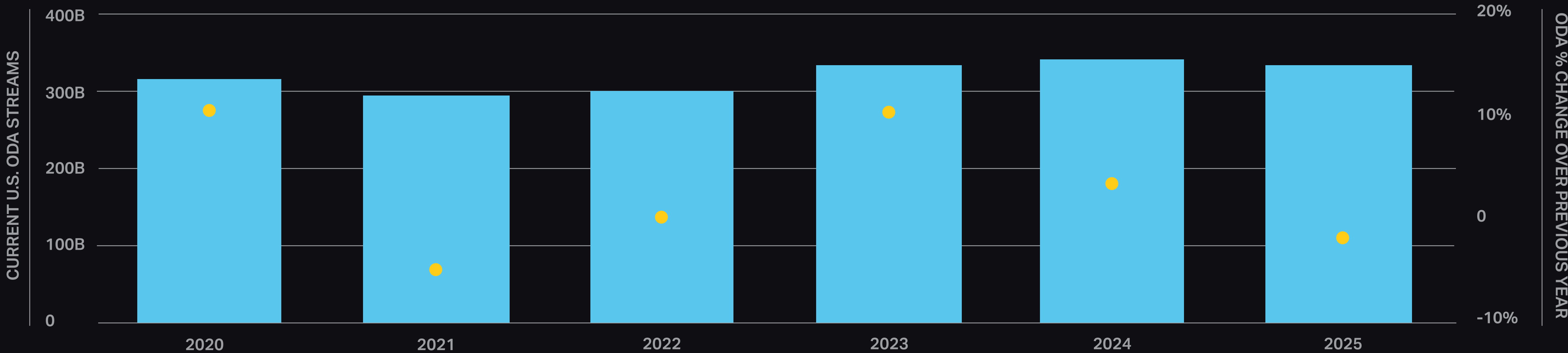
# U.S. Current Music

However, this is not the first time a decline in Current volume has occurred. In 2021, the yearly total fell below the previous year's. FY 2025 marks a two-year growth percentage of +1.8% over FY 2023.

## U.S. ON-DEMAND AUDIO STREAMING

Current (18 months old or newer)

ODA Streams    % Change



SOURCE: LUMINATE MUSIC CONSUMPTION DATA

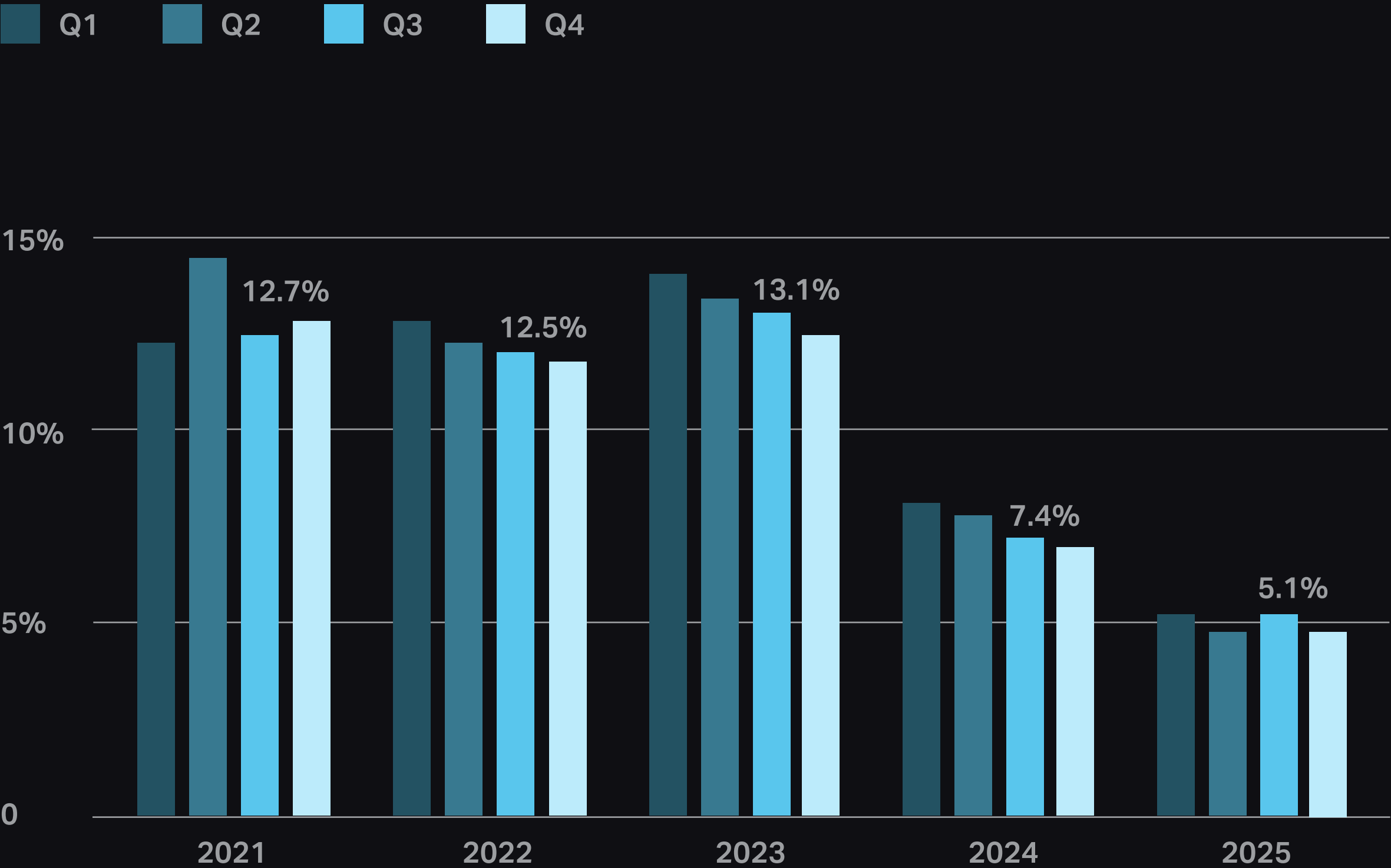


# Streaming Surge: U.S. ODA Streams Accelerate in Q3

While the summer season is typically softer than winter or spring, U.S. On-Demand Audio (ODA) growth accelerated in Q3, rebounding from a less robust Q2. This uptick however, was not reflected internationally as ex-U.S. territories followed the normal trend.

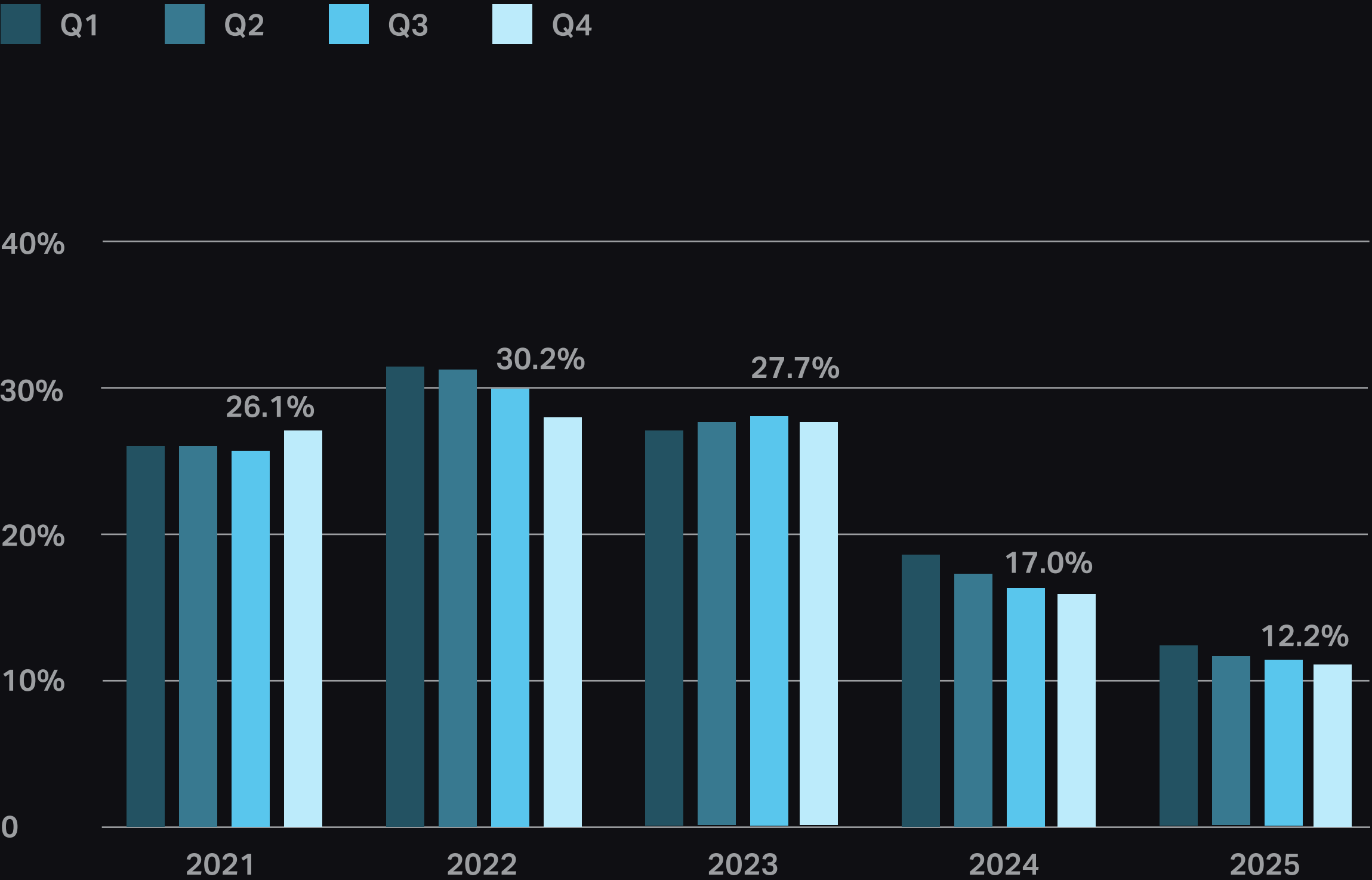
## YEAR-OVER-YEAR PERCENTAGE GROWTH OF U.S. ODA

Read as: In Q3 2025, U.S. On-Demand Audio was up +5.1% vs. YTD last year



## YEAR-OVER-YEAR PERCENTAGE GROWTH OF EX-U.S. ODA

Read as: In Q3 2025, ex-U.S. On-Demand Audio was up +12.2% vs. YTD last year



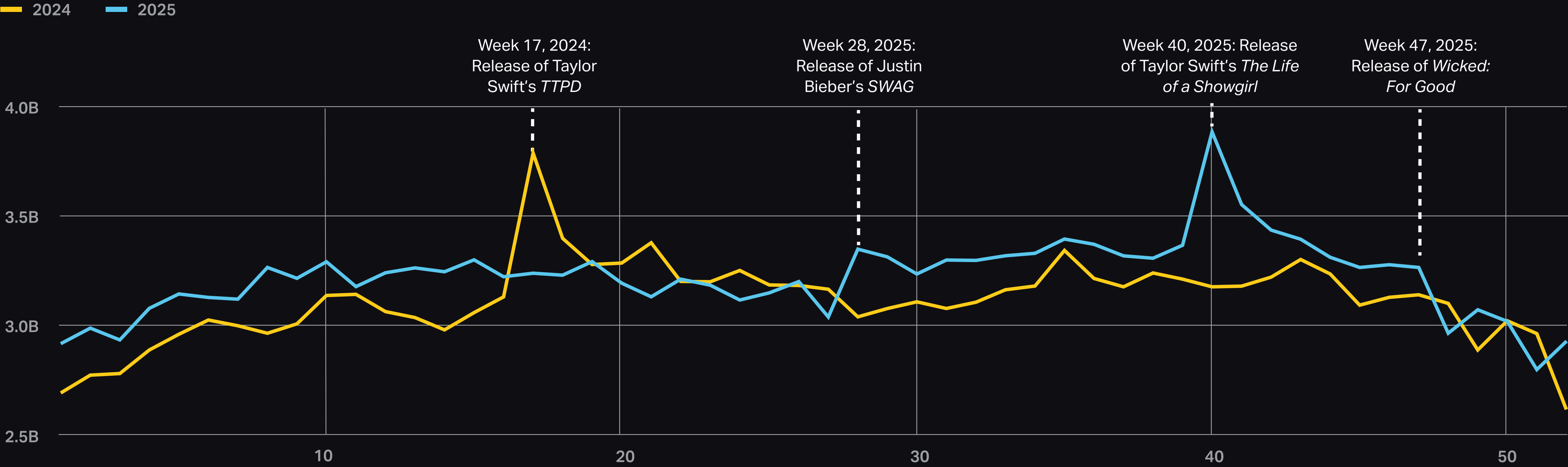
SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# Streaming Surge: Pop Music in Q2 '25 Lagged Behind Q2 '24 Success

Pop On-Demand Audio streams fell in Q2 '25 below Q2 '24 levels for seven weeks (weeks 17-18, 20-21 and 23-25) but staged a comeback starting in week 28. Q2 2024 was an especially strong quarter for Pop, as multiple media outlets referred to the period as “Pop Girl Spring.” Taylor Swift, Dua Lipa, Billie Eilish, Gracie Abrams and more released albums in that quarter, and this impacted volume trending in 2025 through the midyear point. New Pop releases in Q3 2025 have broken through to raise the genre.

## POP MAIN GENRE: WEEKLY ODA



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



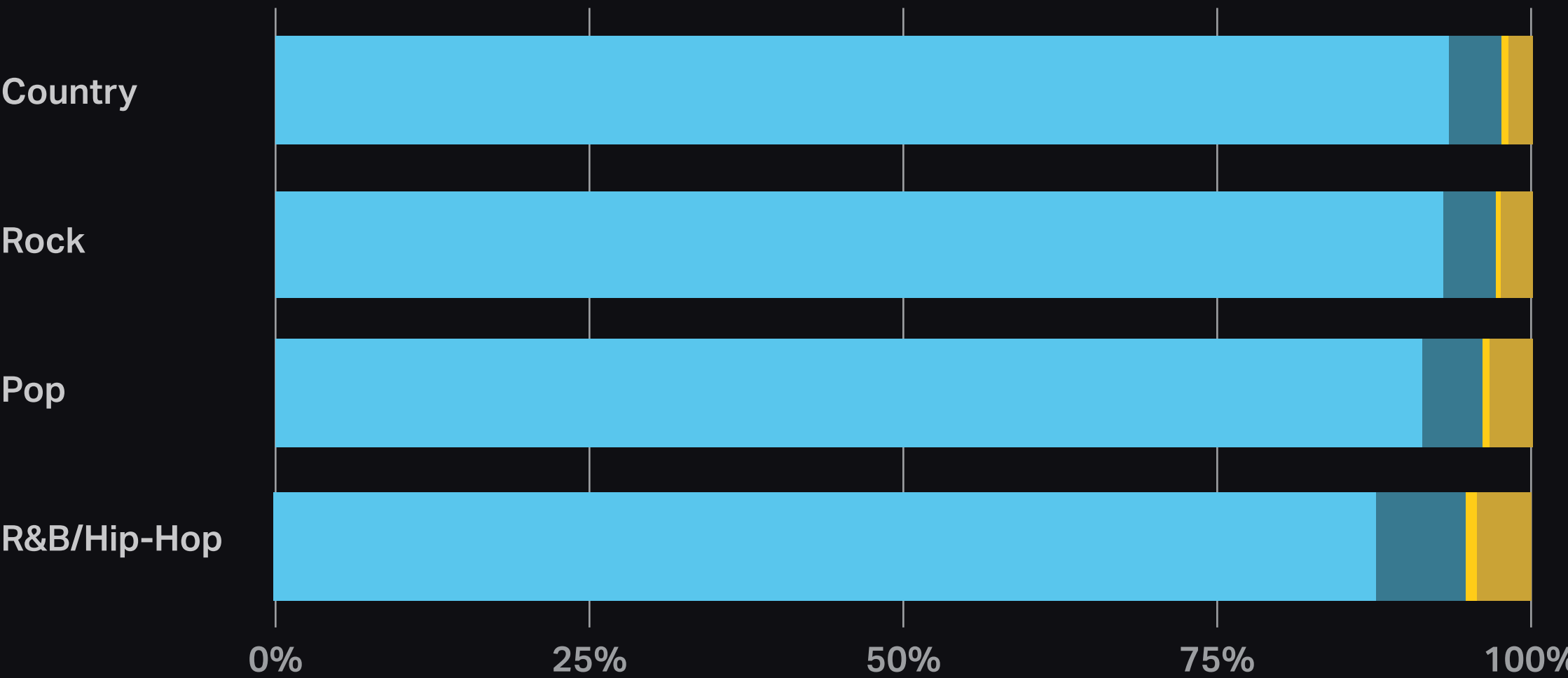
# What Does It Take for a First-Week Chart Hit?

Audiences consume music in different ways, and an analysis of 194 different studio albums to chart on the Billboard 200 in 2025 across select genres show how they got there. While Premium On-Demand Audio holds the edge in streaming, Direct-to-consumer (D2C) is the top channel for first-week album sales, driving 78% of Pop physical sales, over 50% in R&B/Hip-Hop and Rock, while Rock benefits from strong Independent sales and Country sees support from Mass Market and E-Commerce channels.

## FIRST-WEEK CHART-ELIGIBLE ON-DEMAND STREAMS

Content type and commercial model; read as: (Metric) contributed X% to first-week on-demand streams for (Genre)

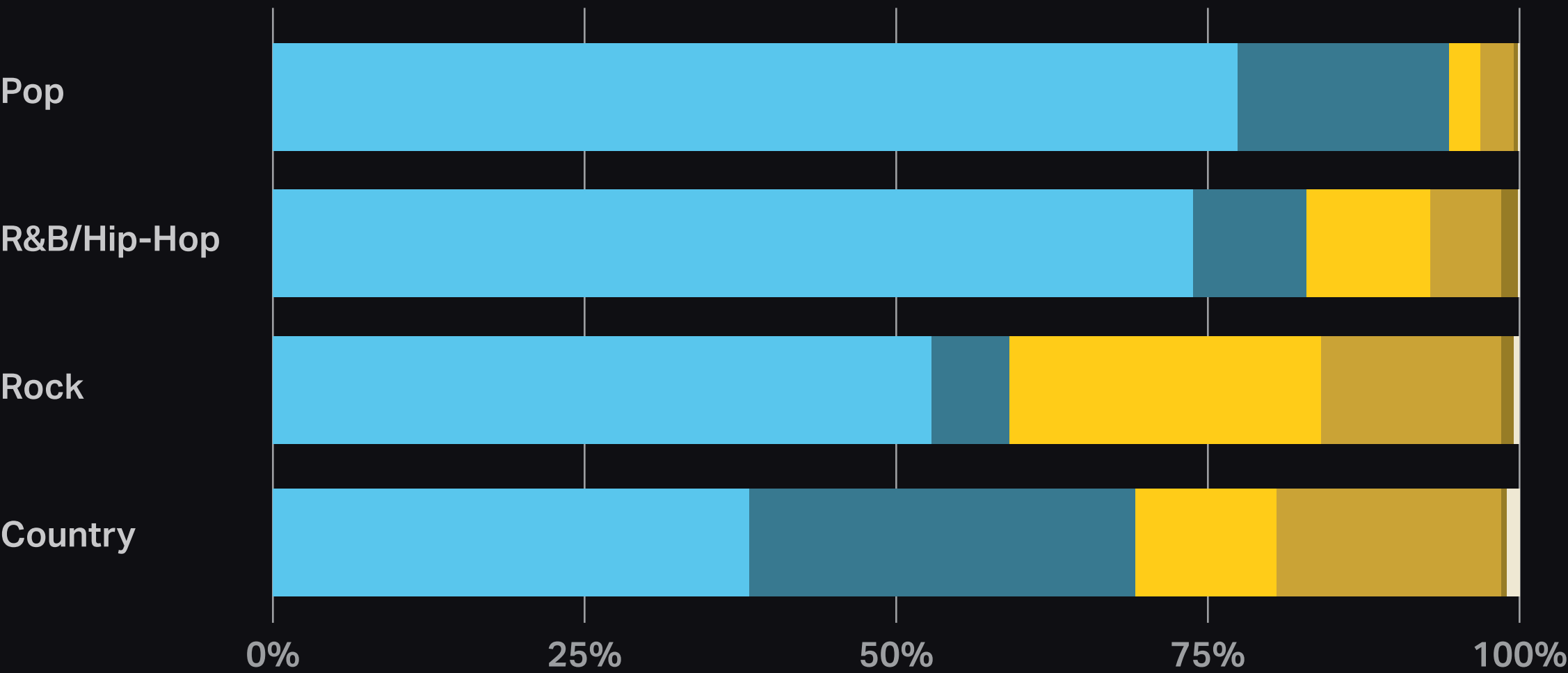
ODA Premium   ODA Ad-Supported   ODV Premium   ODV Ad-Supported



## FIRST WEEK PHYSICAL ALBUM SALES

Read as: (Store strata) contributed X% to first-week physical album sales for (Genre)

Direct to Consumer   Mass Market   Independent   E-Commerce  
Non-Traditional   Venue



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



## Share of U.S. Physical Sales, by Strata

U.S. vinyl sales increased for the 19th straight year, growing +8.6% to 47.9M. Four in 10 vinyl records were sold at indie record stores. Meanwhile, 1 in 3 CDs were purchased through e-commerce sites.

Overall, Direct-to-Consumer sales now make up 13.6% of all physical albums sold, a +2.1 Share Percentage Point increase from 2024.



BILLIE EILISH  
CREDIT: JOHN NACION

### U.S. PHYSICAL ALBUM SALES BY STRATA

FY 2025

	Direct to Consumer	E-Commerce	Independent	Mass Market	Non-Traditional	Venue
Cassette	29%	21%	48%	0%	0%	2%
CD	13%	34%	20%	30%	2%	1%
Vinyl	14%	22%	39%	23%	1%	1%

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# The U.S. Vinyl Purchaser Is Growing More Diverse

Music’s vinyl purchasing segment is evolving as the format continues to gain mainstream attention. Among the trends emerging over the past year:



## DIVERSITY

Vinyl buyers are becoming more multicultural as African American, Asian American, Hispanics and other ethnicities — collectively — now represent almost half of all vinyl purchasers (46%), an increase of +18% vs. 2024.

## MILLENNIALS

Millennials increased their vinyl purchasing the most since Q3 2024, with 18.7% of the demo’s music listeners saying they’ve purchased vinyl over the past year — a +43% bump from 2024.

+33%

Both D2C and Indie Record Store vinyl purchasers show elevated spend (+33% and +22%, respectively) for live music concerts relative to total vinyl buyers overall.

## INDIE RECORD STORE PURCHASER

Consumers purchasing vinyl from indie record stores are expressing greater satisfaction (+13%) with the value they’re getting from physical music vs. the average vinyl buyer.

## DISPOSABLE INCOME

Affluent consumers (HHI 100K+) made up a meaningfully larger proportion of the vinyl-buying audience vs. 2024 (+36%), as almost a third of this group now fit this criteria.

## DIRECT-TO-CONSUMER (D2C)

D2C vinyl buyers are heavily concentrated among Gen Z and Millennial segments, which collectively comprise almost 80% of this group.

## MASS-MARKET PURCHASER

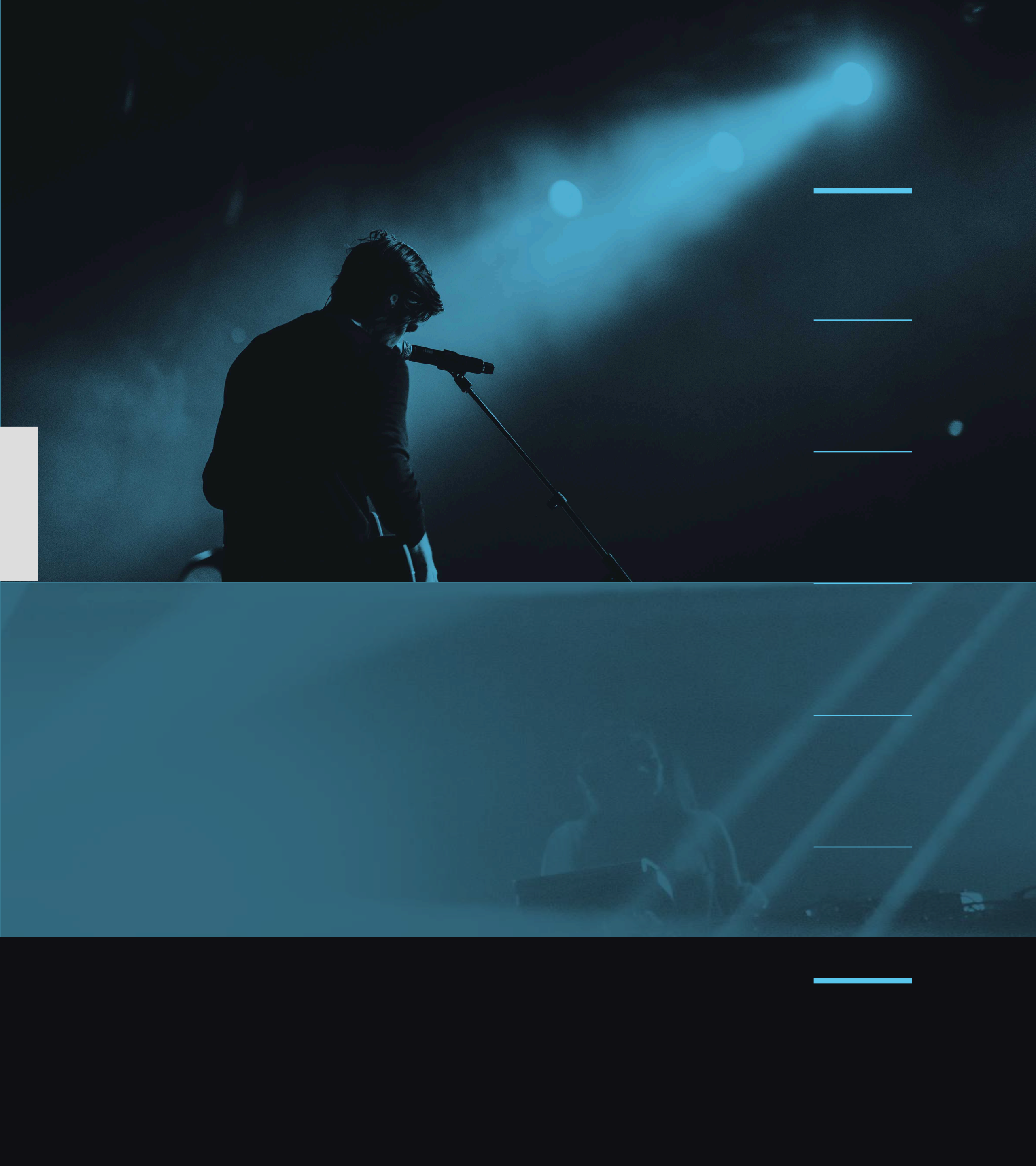
Those who purchase vinyl exclusively at mass-market retailers over-index in K-pop, Christian/Gospel and Children’s music.

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



# PREMIUM PRICING

Spotify and Amazon Music Unlimited both announced subscription price increases in 2025. Since October 2022, these providers, along with Apple Music and YouTube Music, have all increased their monthly price, with Spotify making announcements each year since 2023. As the move to maximize average revenue per user (ARPU) in mature markets takes hold, understanding market tolerance to price increases, as well as for those audiences left to convert, becomes increasingly important.



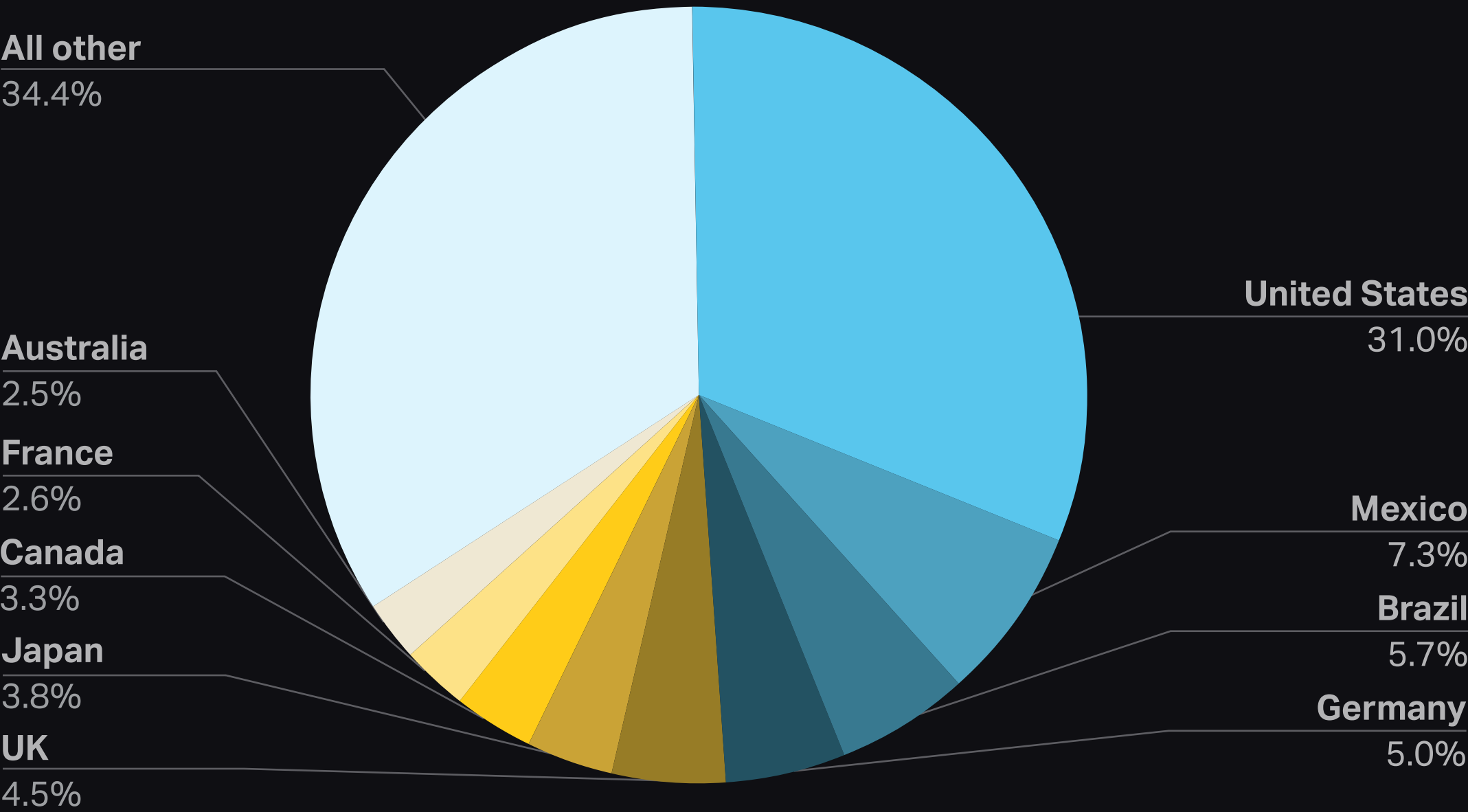


## On the Global Stage: Top Premium Markets

Nearly half (48.9%) of all Global Premium streams are from just four territories: the U.S., Mexico, Brazil and Germany. Although India is primarily an ad-supported market (84%), its premium streams grew by +42% this year, highlighting its massive potential. India added the 4th most Premium streams to its market total this year, but if India was to convert 5% more of its Ad-Supported streams to Premium this would result in 98B total Premium streams to place 10th in the world by Premium volume.

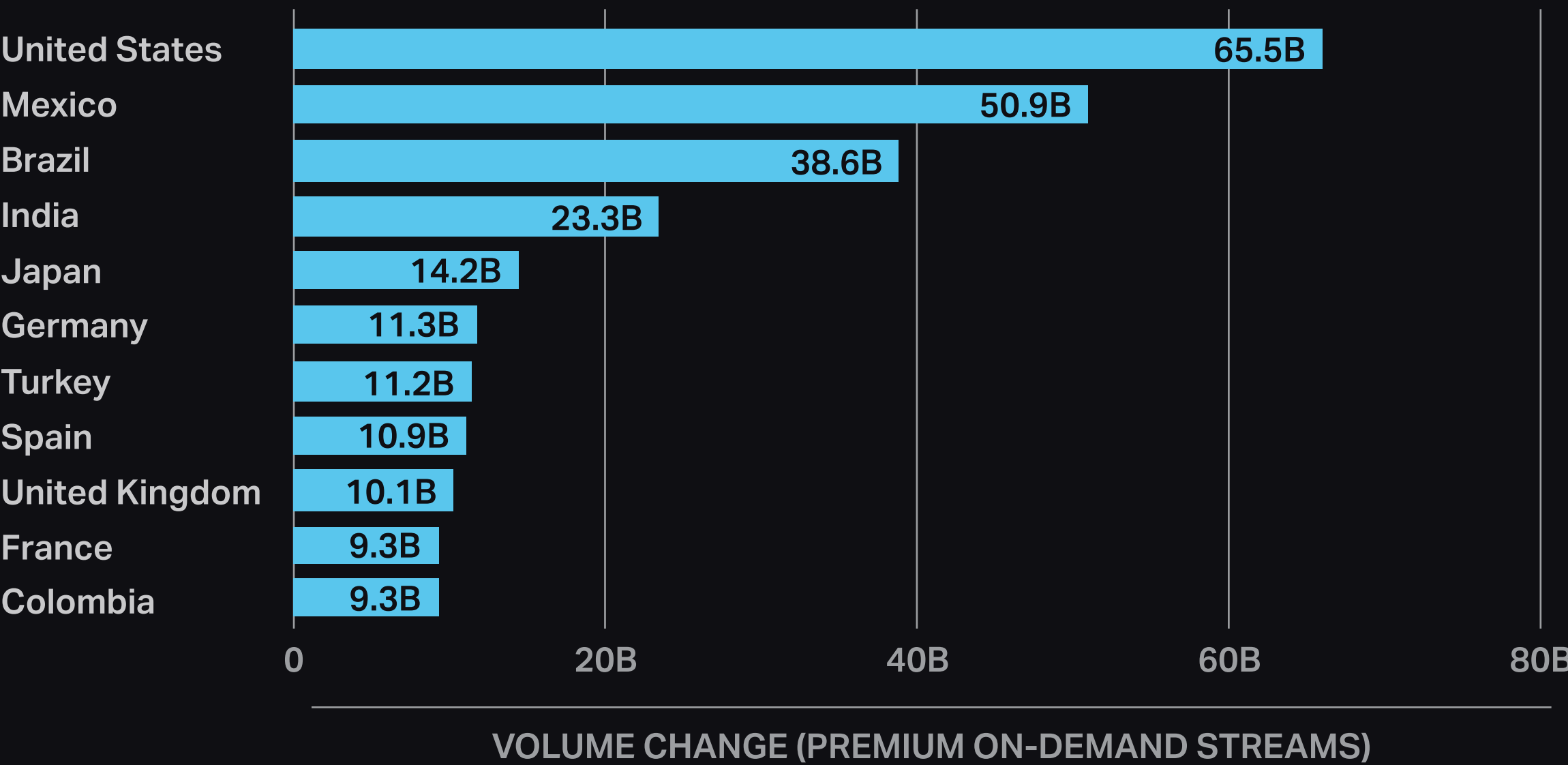
In Premium rankings, Japan ranks #5 in Premium volume, up +10.3% vs last year. Notably, the percentage of Japanese Gen Z who are Premium music streamers has risen to 42%, up from 36% in 2023. Concurrently, reports of free streaming usage have decreased slightly since 2023, indicating a successful conversion rate from free to Premium services.

### 2025 SHARE OF GLOBAL PREMIUM STREAMS, BY MARKETS



### PREMIUM STREAMING VOLUME GROWTH

Ranked by net new Premium On-Demand streams, 2025 vs. 2024



SOURCES: LUMINATE MUSIC CONSUMPTION DATA, JAPAN MUSIC 360



# Converting to Premium Streams

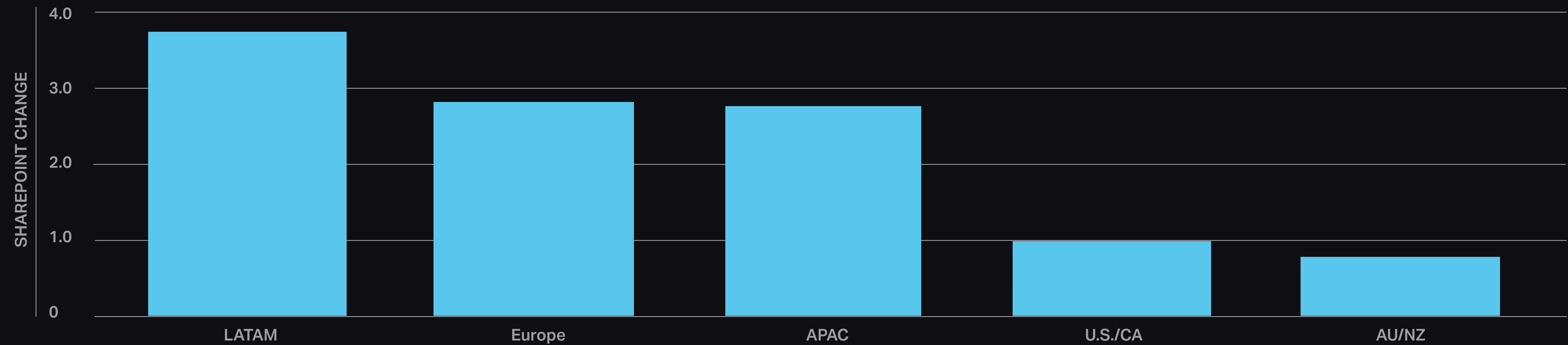
At a Regional level, Latin America (LATAM) is converting to Premium streams at the highest rate with Mexico setting the pace. There were +50.9B Premium On-Demand streams this year in Mexico, demonstrating its global role as a Premium market driver.



RAUW ALEJANDRO  
CREDIT: KRISTINA BUMPHREY

## AVERAGE GROWTH OF PREMUM SHARE, BY REGION (2025 VS. 2024)

Read as: Market’s share of Premium streams has grown by +xx points when comparing 2025 to 2024



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



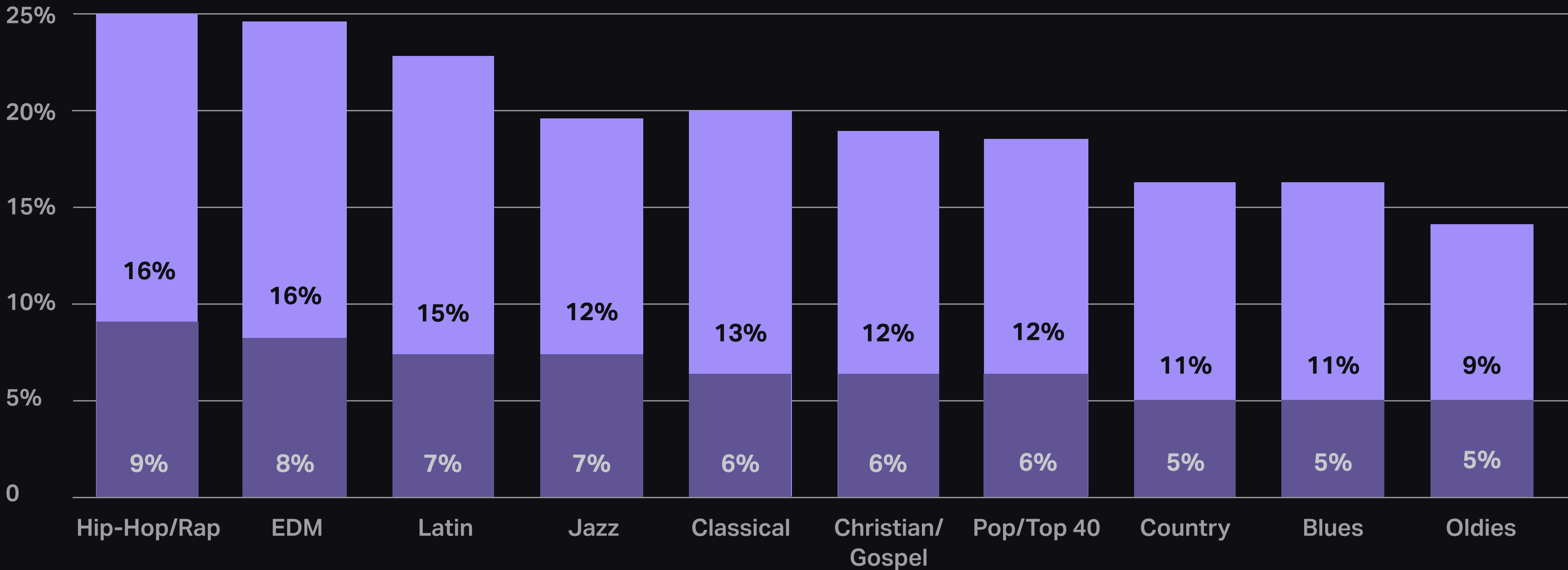
# U.S. Likelihood of Paying for a Streaming Service, by Genre Listenership

Identifying audiences likely to pay for a streaming service is critical in mature markets as the potential new subscriber pool shrinks. Genres with strong listenership on DSP streaming services, such as R&B/Hip-Hop, Latin and Electronic Dance Music (EDM) also show the highest potential for converting nonsubscribers. These genres are expected to keep performing well, but Jazz presents a niche opportunity to grow its fandom among subscribers.

## LIKELIHOOD OF SIGNING UP FOR DSP IN NEXT SIX MONTHS

Among non-DSP-paying monthly genre listeners

Somewhat Likely Extremely Likely



41%

This percentage of Jazz listeners cite “high audio quality” as an extremely important feature, a rate 25% (+8 pts) higher than that from “Non-Payers” (e.g., consumers who don’t currently lay out for a DSP subscription) overall.

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

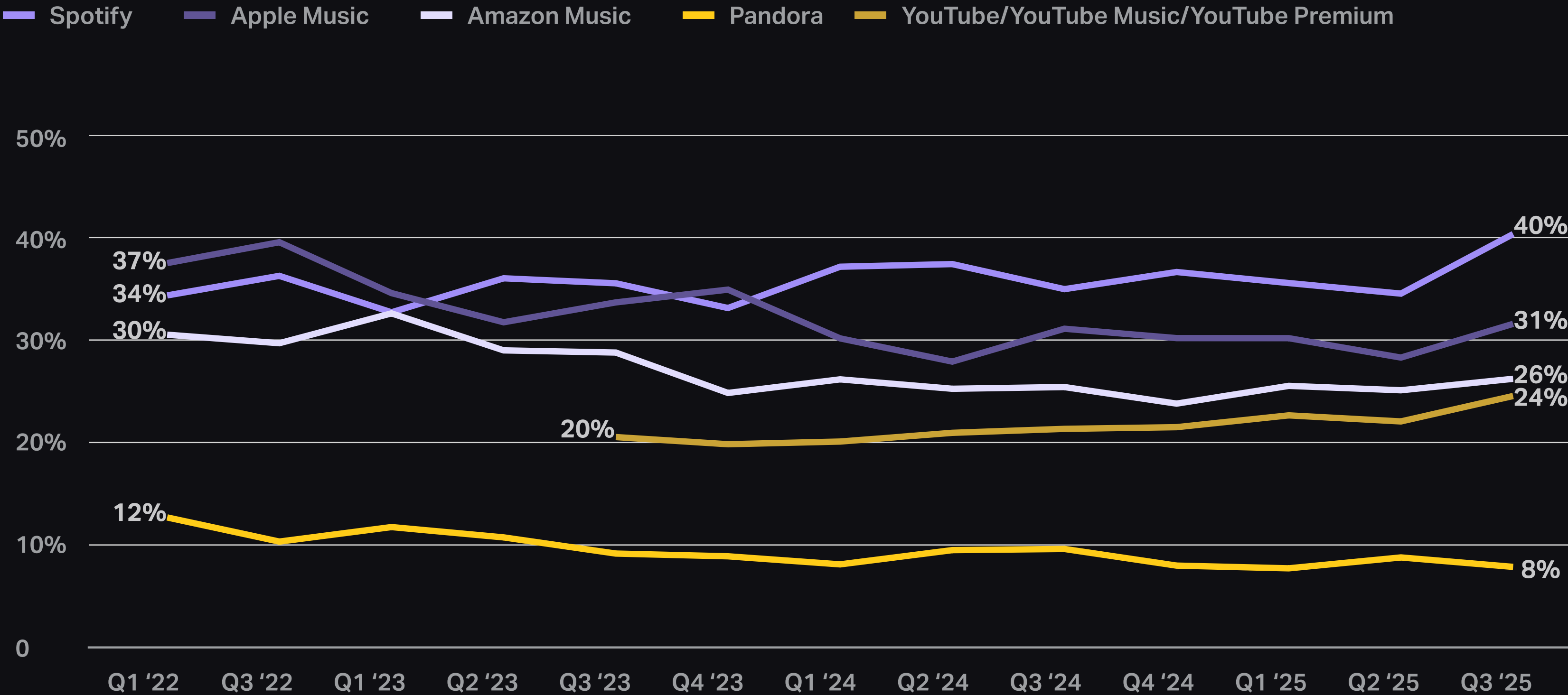


# 2025 Shows Signs of Paid/Premium DSP Usage Recovery

Audiences report steady Paid/Premium usage rates for Spotify over the last four years, while YouTube has gradually increased its Paid/Premium market penetration. However, Paid/Premium usage of Apple Music and Amazon Music are still lower in 2025 vs. their higher rates in 2022 and 2023.

## PAID/PREMIUM DSP PLATFORM USAGE

Consumer response data among U.S. Paid DSP users



76%

Paid streamers make up 42% of the U.S. general population yet account for 76% of all U.S. music spend (including physical music, live events and artist merch).

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



# Streaming Platform Listenership

As consumer behaviors evolve, audience clusters reveal which genres over-index on certain DSP streaming platforms. Those who listen to Rock on a monthly basis are more often found on Apple Music, while those listening to Country are doing so on Amazon Music. Meanwhile, YouTube is more oriented toward Latin and “eclectic” genres such as Jazz and Classical. Below, the platforms listed beneath each genre represent where that genre listenership over-indexes based on consumer research data.



ROCK
Apple Music
LATIN
YouTube/YouTube Music

R&B/HIP-HOP
Apple Music (tie)
YouTube/YouTube Music (tie)
ELECTRONIC DANCE MUSIC
Spotify (tie)
YouTube/YouTube Music (tie)

POP
Spotify
JAZZ
YouTube/YouTube Music

COUNTRY
Amazon Music
CLASSICAL
YouTube/YouTube Music

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



— 03


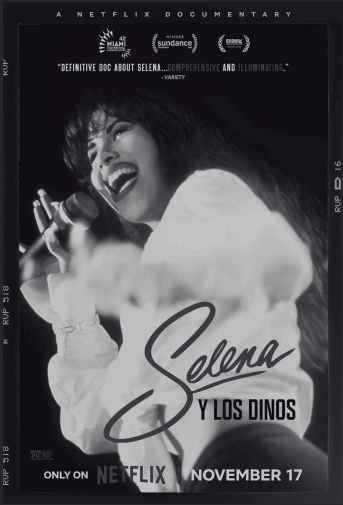
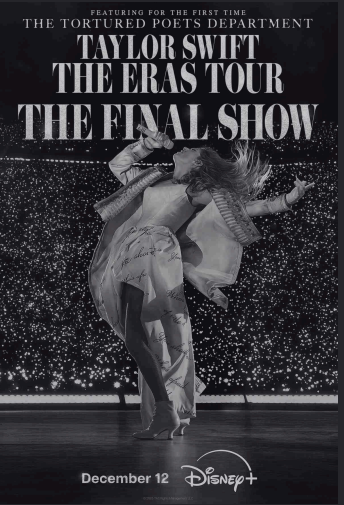
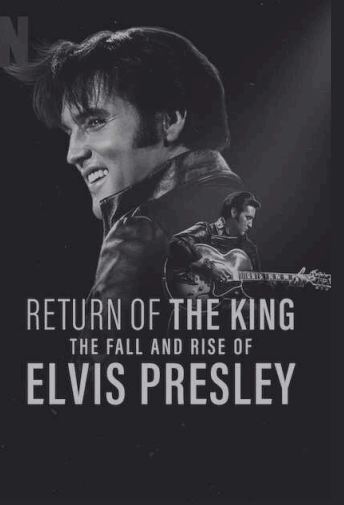

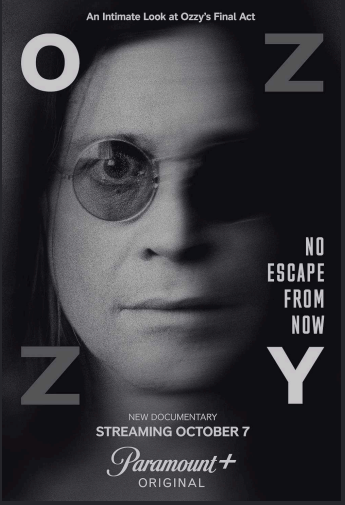
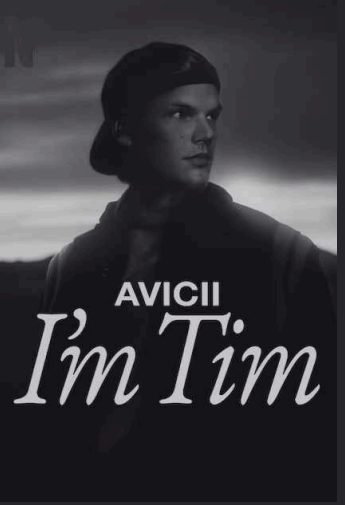
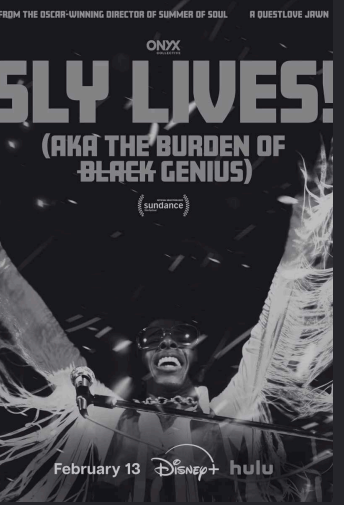
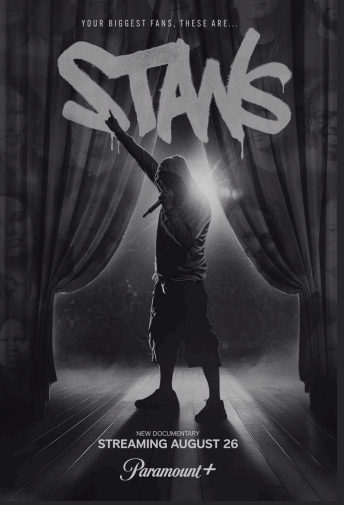
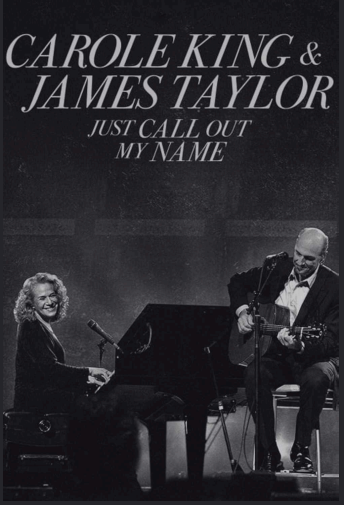
# WELCOME TO TRANSMEDIA

Transmedia — the convergence and expansion of content across different media types, such as music, gaming, film and television — is critical for navigating the modern connected world. This approach, where a single intellectual property is deployed across multiple platforms, allows rights holders to maximize revenue from non-traditional streams. Crucially, established music artists act as powerful audience drivers, leveraging loyal fan bases to bring immediate, engaged viewership to the various initiatives with which they're involved, from film and TV properties to commercial brands.



# Top 10 Music Documentaries of the Year

*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 at the time: 40.4M for the week ending 2/27/25. Led Zeppelin’s streams also sustained a new baseline average of 38M per week through 1/1/26, which is +16% over the previous period.

										
	<i>Becoming Led Zeppelin</i>	<i>Selena y Los Dinos</i>	<i>Taylor Swift: The Eras Tour - The Final Show</i>	<i>Return of the King: The Fall and Rise of Elvis Presley</i>	<i>Yacht Rock: A Dockumentary</i>	<i>Ozzy Osbourne: No Escape From Now</i>	<i>Avicii: I'm Tim</i>	<i>Sly Lives! (AKA the Burden of Black Genius)</i>	<i>Stans</i>	<i>Carole King &amp; James Taylor: Just Call Out My Name</i>
Music Doc Rank	1	2	3	4	5	6	7	8	9	10
Overall Doc Rank	14	17	23	48	49	54	55	59	60	63
Minutes Watched	550.6M	436.3M	314.7M	156.7M	147.1M	143.9M	141.5M	133.9M	130.0M	124.7M
Release Date	2/5/25	11/17/25	12/12/25	11/13/24	11/29/24	10/7/25	11/13/24	2/13/25	8/26/25	1/2/22
Platform	Netflix	Netflix	Disney+	Netflix	HBO Max	Paramount+	Netflix	Disney+	Paramount+	HBO Max

SOURCE: LUMINATE FILM & TV STREAMING VIEWERSHIP (M), MUSIC DOCUMENTARY MOVIES ONLY; DOES NOT INCLUDE MULTI-EPIISODE TV SHOWS

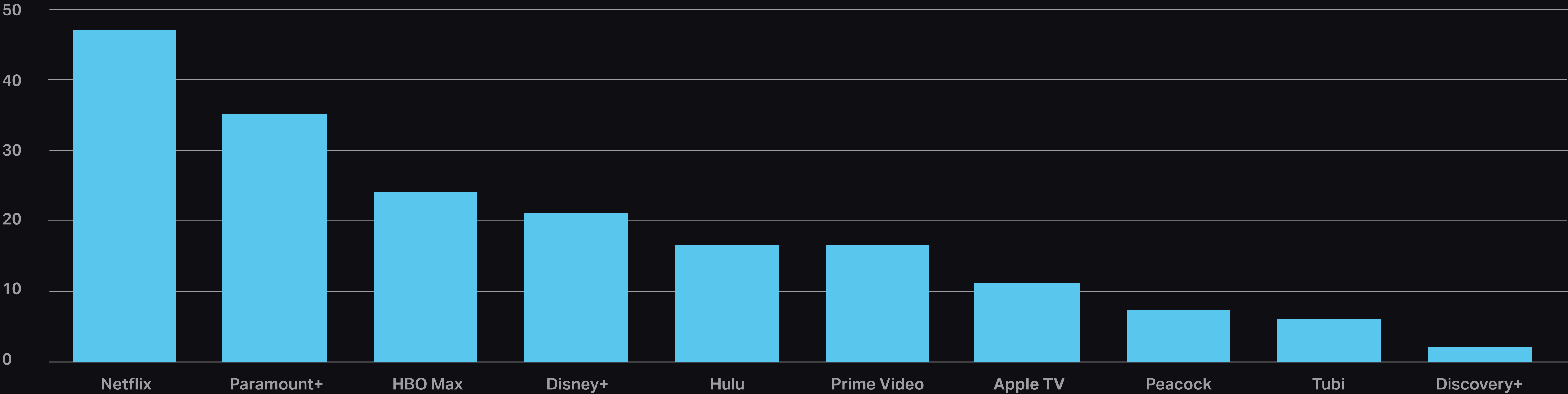


# Music Documentary Premieres by Platform

Since 2018, Netflix and Paramount+ lead in the number of new music documentary premieres. These are never-before-seen titles where the platform itself is listed as the originating distributor.

## DOCUMENTARY PREMIERES

For 2018-25



SOURCE: LUMINATE FILM & TV / NOTE: DATASET INCLUDES ANY TITLE IN LUMINATE FILM & TV THAT CAME OUT BETWEEN 2018 AND 2025 IN THE ARENA OF "DOCUMENTARY" AND "MUSIC"; DOES NOT INCLUDE COMPETITION SERIES, MUSIC AWARDS SHOWS, LIVE PERFORMANCES OR REALITY SERIES



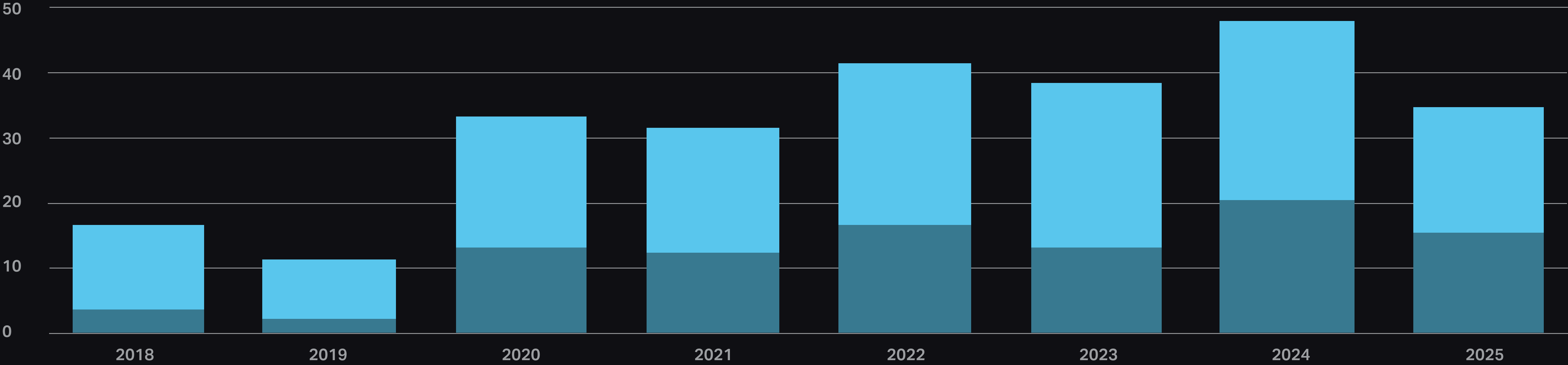
# Music Documentary Premieres by Year

Thirty-one music documentaries premiered in 2025 across all platforms, which was -30% vs 2024. This drop after 2024’s high-water mark mirrors the film & TV production slowdown seen across the industry amidst the two screen guild strikes in 2023 that halted scripted production. Music documentaries are most often “unscripted” content, which fell outside that which was impacted by the strike. The 2025 decline in music documentary premieres signals the return of other scripted content to platforms following a full production cycle after the strikes.

## DOCUMENTARY PREMIERES

2018-25 premieres on SVOD platforms

Series/Specials    Films



SOURCE: LUMINATE FILM & TV / NOTE: DATASET INCLUDES ANY TITLE IN LUMINATE FILM & TV THAT CAME OUT BETWEEN 2018 AND 2025 IN THE ARENA OF “DOCUMENTARY” AND “MUSIC”; DOES NOT INCLUDE COMPETITION SERIES, MUSIC AWARDS SHOWS, LIVE PERFORMANCES OR REALITY SERIES



# Music at the Movies

Audience research shows music fans are highly intent on going to the theater, and the recent “Music at the Movies” trend continued in the latter half of 2025. Music films from Taylor Swift, Depeche Mode and David Gilmour all debuted in brick-and-mortar theaters in the second half of 2025, while *KPop Demon Hunters* also made a limited time jump from Netflix to the silver screen this fall.



TAYLOR SWIFT  
CREDIT: GILBERT FLORES

## PERCENTAGE WHO PLAN TO VISIT A MOVIE THEATER IN THE NEXT THREE MONTHS

	General Population	Multilingual Music Listeners*	Premium Music Streamers	Superfan Music Listeners
U.S.	32.9%	46.5% (142)	46.2% (141)	57.0% (173)
Japan	22.3%	38.1% (170)	48.6% (218)	66.2% (297)
Germany	26.7%	36.7% (138)	37.5% (141)	59.3% (222)

+\$50M

Taylor Swift: *The Official Release Party of a Showgirl* (distributed through AMC Theaters in October) claimed \$34M at the U.S. box office when it was released to theaters. The one-weekend engagement netted +\$50M worldwide, with the top ex-U.S. box office territories being the United Kingdom and Germany.

SOURCE: LUMINATE INSIGHTS MUSIC 360 (U.S.), LUMINATE FILM & TV / \*A "MULTILINGUAL MUSIC LISTENER" IS A MUSIC LISTENER WHO REPORTS LISTENING TO MORE THAN ONE LANGUAGE OF MUSIC



# Music at the Movies

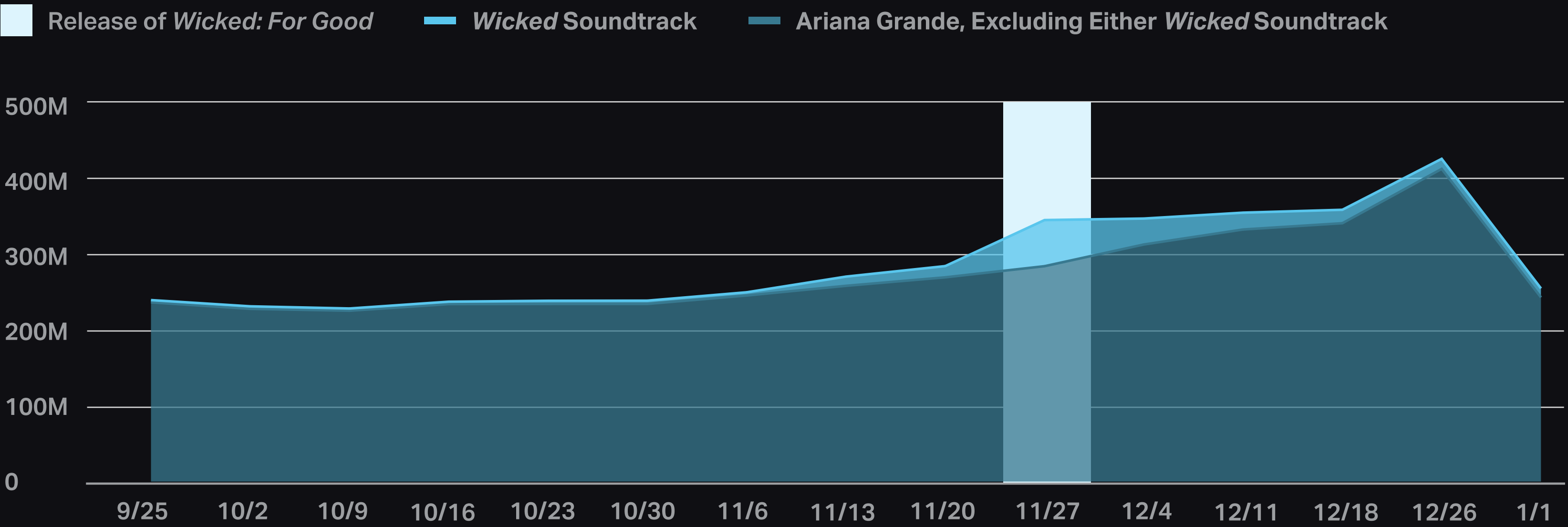
Ariana Grande reprised her role as Glinda in *Wicked: For Good*, which was released in theaters on Nov. 21, 2025, to a resounding \$147M in gross U.S. box office revenue its first weekend. Through three weeks of release, the film grossed \$445M globally. Grande is a key performer on the film’s soundtrack, and streams of her music overall, excluding either *Wicked* soundtrack, have grown +5.5% globally.



ARIANA GRANDE  
CREDIT: JC OLIVERA

## ARIANA GRANDE: WEEKLY GLOBAL STREAMS

Global On-Demand Audio streams, Sept. 19, 2025 - Jan 1, 2026, by week-ending date



This activity can lead to brand opportunities, benefitting all parties:

72%

of Ariana Grande fans would tune in to a show/performance of hers.

+33%

of Ariana Grande fans are more likely to book an airline ticket in the next three months than the average U.S. consumer.

SOURCE: LUMINATE MUSIC CONSUMPTION DATA, STREAMING VIEWERSHIP (M), MUSIC 360 (U.S.), ARTIST + GENRE TRACKER

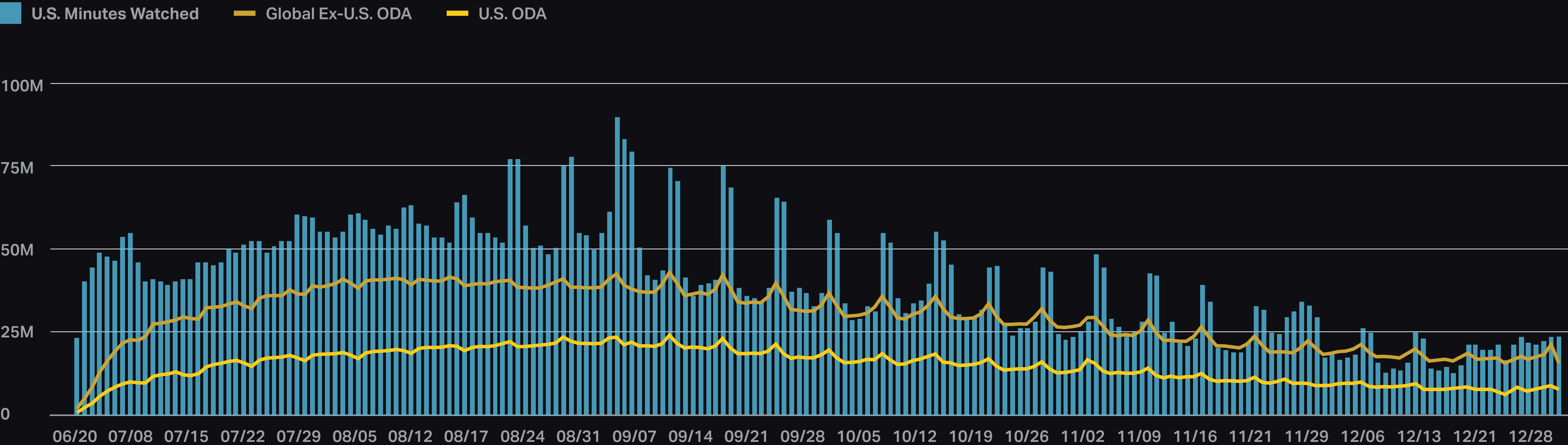


# Netflix's *KPop Demon Hunters* Drives Music Consumption Globally

The release of Netflix's *KPop Demon Hunters* on June 20, 2025, had a seismic impact in both the U.S. and ex-U.S. territories for music consumption. It became the first official soundtrack to hit #1 on the Billboard 200 since *Encanto* (2022), with three of the soundtrack's songs ranking in the U.S. and Global Top 50 for On-Demand Audio streaming and hit single "Golden" spending eight weeks at #1 on the Billboard Hot 100 and a record 20 weeks at #1 on the Billboard Global Excl. U.S. chart (through charts dated Jan. 10, 2026). Overall, more than two-thirds of the soundtrack's audio streams are coming from outside the U.S.

## KPOP DEMON HUNTERS: U.S. STREAMING VIEWERSHIP VS. GLOBAL ODA STREAMS

By daily minutes watched, June 20, 2025 - Jan. 1, 2026



SOURCE: LUMINATE MUSIC CONSUMPTION DATA; STREAMING VIEWERSHIP (M)

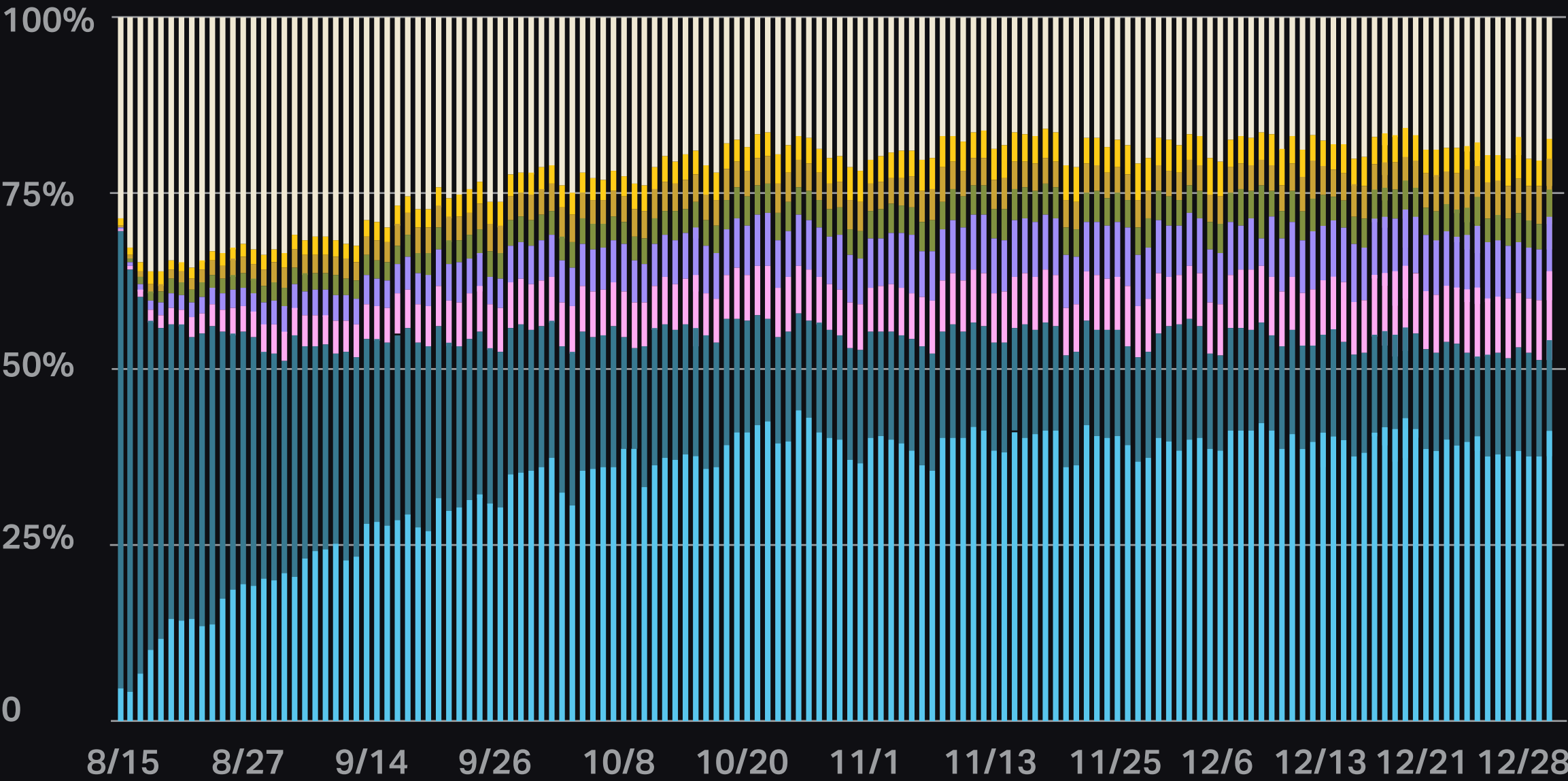
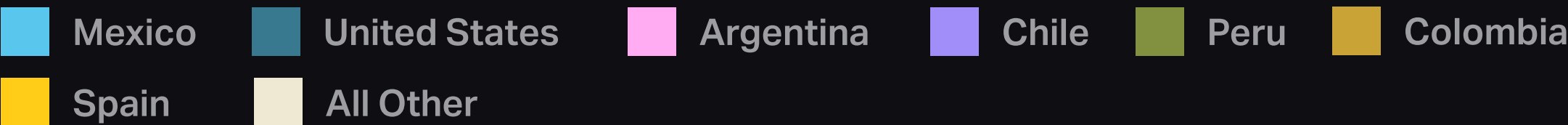


# New Versions of Hit Single “Golden” Attract New Audiences Outside of Asia-Pacific Region

As the film and soundtrack for *KPop Demon Hunters* began resonating globally, versions of “Golden” were released in different languages to connect with new listeners. The Spanish version attracts streams from Latin America, while the French version draws streams from neighboring European territories.

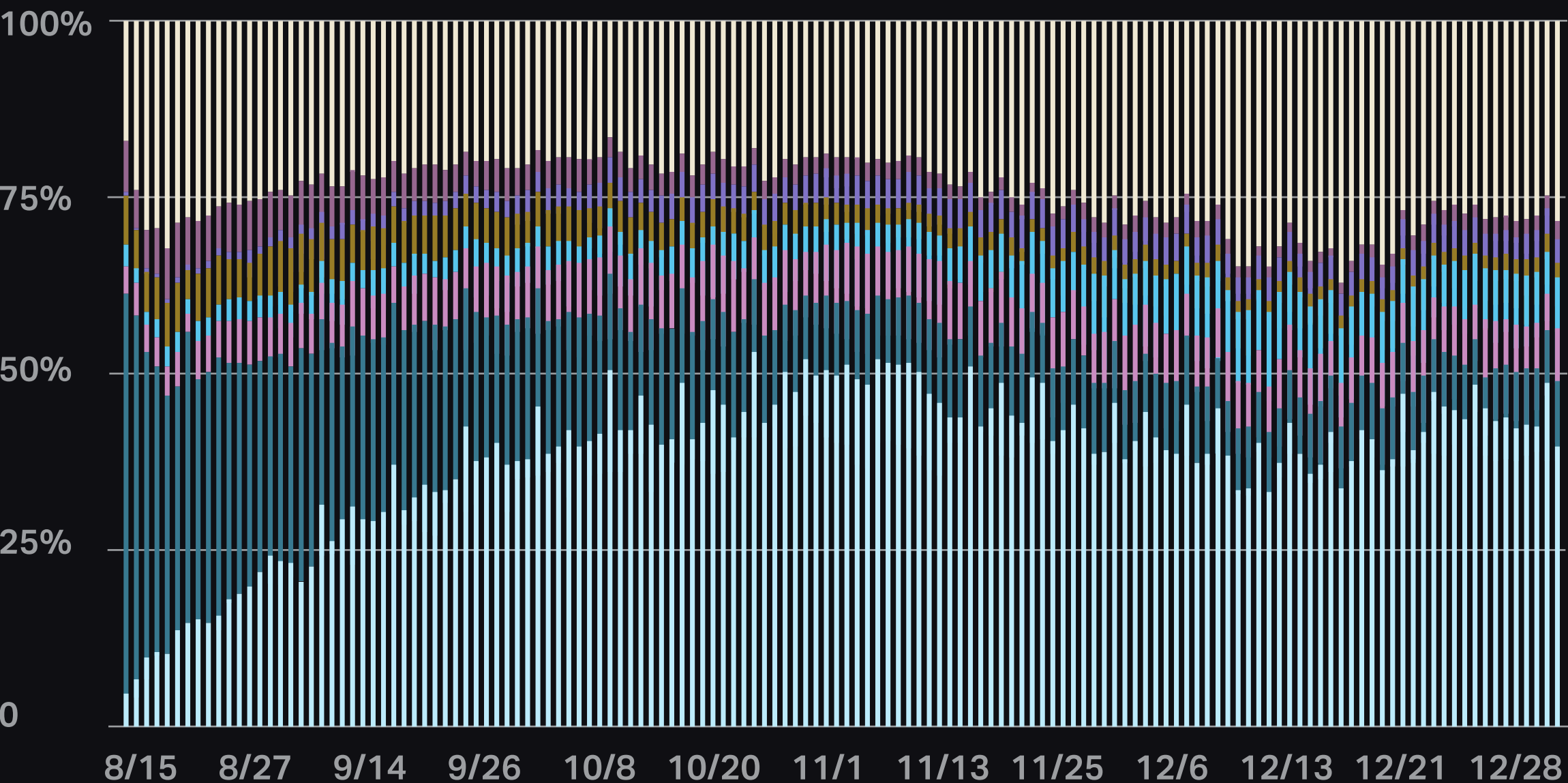
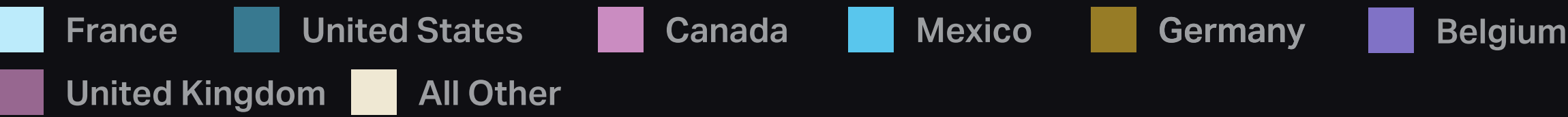
## DORADA “GOLDEN” VERSION EN ESPAÑOL

Top Markets, Total On-Demand streams (audio + video), Aug. 15, 2025 - Jan. 1, 2026



## BRILLER “GOLDEN” VERSION FRANÇAISE

Top Markets, Total On-Demand streams (audio + video), Aug. 15, 2025 - Jan. 1, 2026



SOURCE: LUMINATE MUSIC CONSUMPTION DATA, 1/15/25-1/1/26



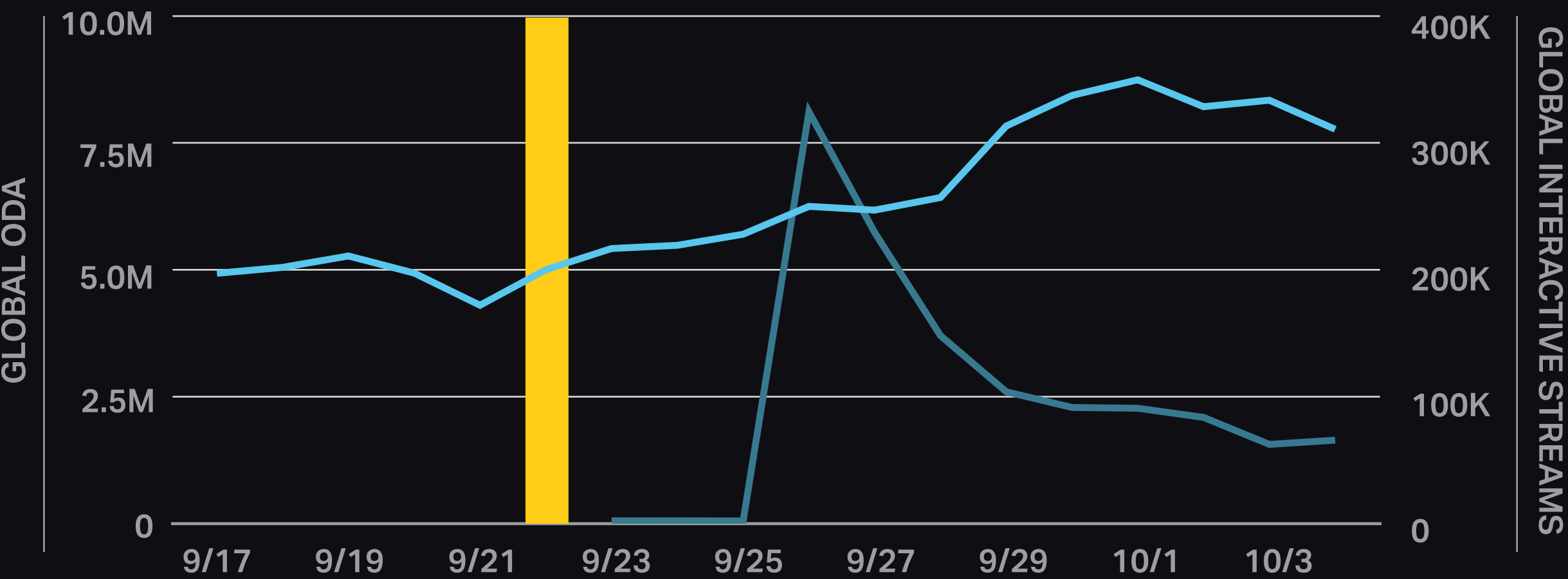
# Daft Punk x Fortnite

The Daft Punk Experience launched on *Fortnite* in September 2025 as an immersive in-game “experience” that brought together the electronic French duo’s music and iconic Alive 2007 stage setup. The resulting activation drove not only Interactive Streams but music consumption. Daft Punk’s catalog experienced a +47.9% jump in U.S. On-Demand Audio streaming during the 7 days following the launch and a +44.6% jump globally. Overall, the campaign generated 1.1M Global Interactive Streams in its first week.

## DAFT PUNK: DAILY GLOBAL STREAMS

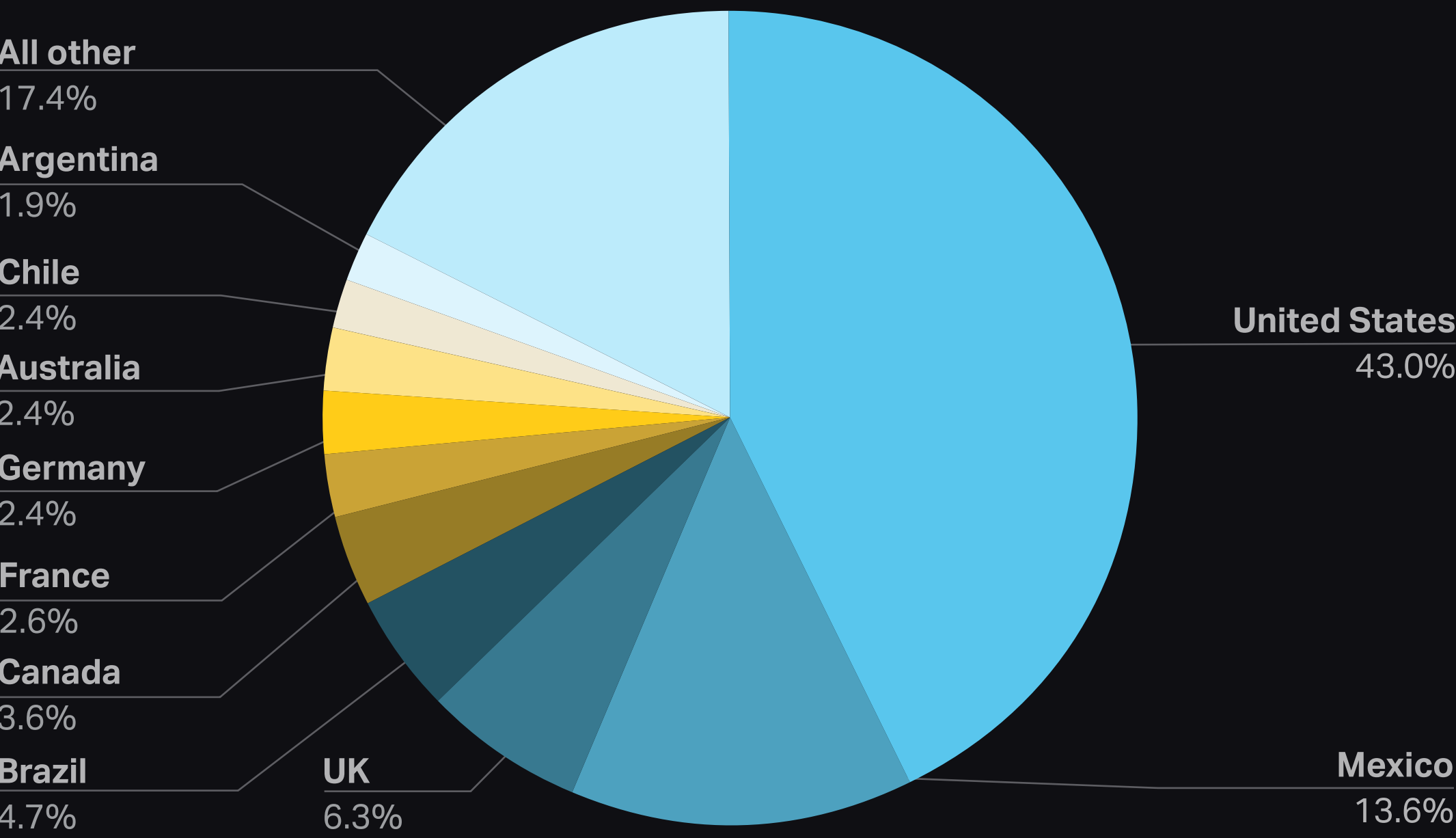
For Sept. 17-Oct. 4, 2025

- Fortnite Announcement
- Global On-Demand Audio Streams
- Global Interactive Streams



## DAFT PUNK INTERACTIVE STREAMS, BY COUNTRY

For Sept. 23-Oct. 4, 2025



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# EVOLVING FANDOM

The entertainment world has gone global, and multinational DSPs and social communities connect fans with artists anywhere in the world. Understanding import/export trends and the role fandom plays in their expansion calls for new global strategies.





# Global Export Power Rankings

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. While the Top 10 countries in export power remain the same since 2024, Brazil moves up due to strengths in Latin music export.

## HIGHLIGHTED ITEMS INDICATE CHANGES VS. FY 2024

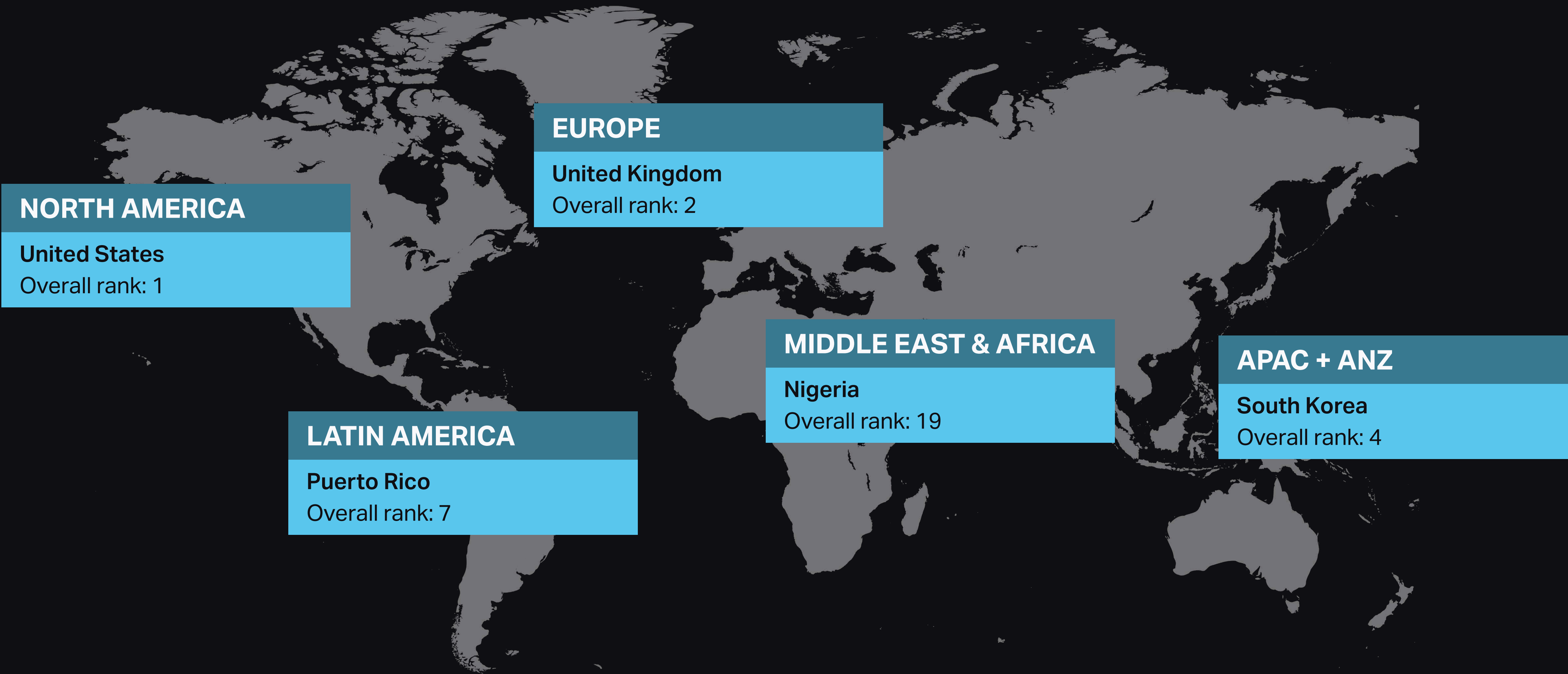
	Country	Top Importer 1	Top Importer 2	Top Importer 3	Top Export Genre
01	United States	Canada	Australia	New Zealand	Pop (ex: Taylor Swift)
02	United Kingdom	United States	Ireland	Australia	Rock (ex: Coldplay)
03	Canada	United States	United Kingdom	Australia	R&B/Hip-Hop (ex: Drake)
04	South Korea	Taiwan ↑	Japan ↓	Malaysia ↑	K-Pop (ex: BLACKPINK)
05	Germany	Austria	Switzerland	Slovakia	EDM (ex: Zedd)
06	France	Belgium	Switzerland	Netherlands	EDM (ex: David Guetta)
07	Puerto Rico	United States	Mexico	Spain	Latin (ex: Bad Bunny)
08	Australia	United States	Philippines ↑	Canada	Pop (ex: SIA)
09	Brazil ↑	Portugal	Bolivia	Argentina ↑	Latin (ex: MC Tuto)
10	Sweden ↓	United States	Norway	Germany	EDM (ex: Avicii)

SOURCE: LUMINATE MUSIC CONSUMPTION DATA / NOTE: FY 2025 (1/3/25-1/1/26)



# Global Export Power Rankings

Below are top exporting countries / territories from each region. While not in the Top 10, Nigeria has increased its ranking from #23 in 2024 to #19 in 2025 as artists like Burna Boy and Ayra Starr connect with global audiences.



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# Top Growth Genres Originating From Outside the Region

As global music export is emphasized, certain genres began to connect in different markets. When analyzing for Total On-Demand (Audio + Video) streaming share point change at a regional level, trends including Country’s growth in Asia-Pacific, the increasing consumption of Latin music in Europe and the growth of Rock in Latin America and Australia/New Zealand can be seen.



ZACH BRYAN  
CREDIT: TREVOR PAVLIK

ASIA-PACIFIC
TOP GROWTH GENRES ORIGINATING FROM OUTSIDE THE REGION
Pop
Country & Folk
Religious

EUROPE
TOP GROWTH GENRES ORIGINATING FROM OUTSIDE THE REGION
Pop
Rock
Latin

LATIN AMERICA
TOP GROWTH GENRES ORIGINATING FROM OUTSIDE THE REGION
Rock
Children’s
Jazz

AUSTRALIA/NEW ZEALAND
TOP GROWTH GENRES ORIGINATING FROM OUTSIDE THE REGION
Rock
Pop
Latin

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



## Import/Export: Country of Origin

With the growing number of international partnerships and joint ventures, an analysis of streaming share that is local, regional and ex-regional artists helps to identify countries that are importers and exporters. This aids the understanding of how music spreads around the world and helps direct market entry. For example, if a music artist or label is interested in entering Brazil from abroad, a collaboration with a local Brazilian artist could help this process due to the country’s unusually high rate of local artist streaming.



MIDDLE EAST/AFRICA
MOST LOCAL
Nigeria
62.2 of On-Demand (Audio + Video) streams from a local Nigerian artist
MOST OPEN TO IMPORT FROM THE REGION
Ghana
23.6% of streams from artists of other countries in the region
MOST OPEN TO IMPORT FROM OUTSIDE THE REGION
United Arab Emirates
91.6% of streams from artists of countries outside the region

LATIN AMERICA
MOST LOCAL
Brazil
75.2% of Total On-Demand (Audio + Video) streams from a local Brazilian artist
MOST OPEN TO IMPORT FROM THE REGION
Ecuador
63.1% of streams from artists of other countries in the region
MOST OPEN TO IMPORT FROM OUTSIDE THE REGION
Peru
36.3% of streams from artists of countries outside the region

SOURCE: LUMINATE MUSIC CONSUMPTION DATA / NOTE: MENA COUNTRIES WITH MORE THAN 1B+ TOTAL ON-DEMAND (AUDIO + VIDEO) STREAMS IN 2025, LATAM COUNTRIES WITH MORE THAN 15B+ TOTAL ON-DEMAND (AUDIO + VIDEO) STREAMS IN 2025



# Import/Export: Country of Origin



KARAN AUJLA  
COURTESY PHOTO

## ASIA

### MOST LOCAL

India

79.2% of On-Demand (Audio + Video) streams from a local Indian artist

### MOST OPEN TO IMPORT FROM THE REGION

Taiwan

45.7% of streams from artists of other countries in the region

### MOST OPEN TO IMPORT FROM OUTSIDE THE REGION

The Philippines

61.4% of streams from artists of countries outside the region

## EUROPE

### MOST LOCAL

Turkey

69.9% of Total On-Demand (Audio + Video) streams from a local Turkish artist

### MOST OPEN TO IMPORT FROM THE REGION

Switzerland

51.8% of streams from artists of other countries in the region

### MOST OPEN TO IMPORT FROM OUTSIDE THE REGION

Portugal

69.4% of streams from artists of countries outside the region

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



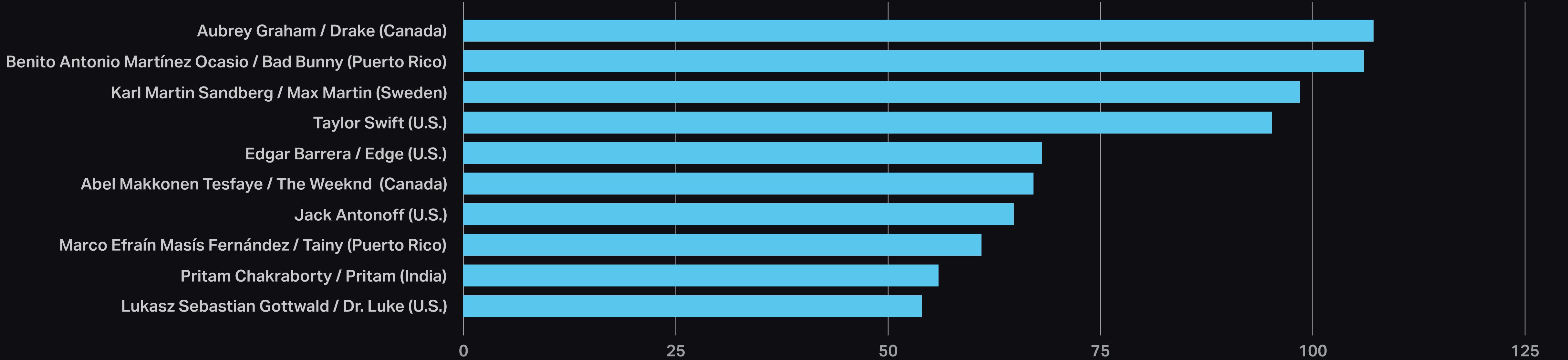
# Global Songwriter Rankings

Aubrey Graham (Drake) and Benito Antonio Martínez Ocasio (Bad Bunny) lead all songwriters, with over 100 works each across the Top 10K Global Audio songs. Overall, five countries of origin (and one territory) are represented across the Top 10 songwriters, with Taylor Swift the leading American songwriter in number of works.



## SONGWRITERS CREDITED MOST OFTEN IN TOP 10K GLOBAL ON-DEMAND AUDIO SONGS

Ranked by number of songs in top 10K, Weeks 1-45 2025



SOURCE: LUMINATE MUSIC DATA ENRICHMENT



# Superfans: Global Citizens/Critical Connectors

Much of the conversation around the superfan impact centers on this loyal group’s local impact, whether it be in music consumption or financial commitment. However, superfans also play a critical role in the import of new music from other countries. In Japan and India, where the streaming of local artists is extremely high (74.5% and 79.2%, respectively), these superfans are helping to introduce new artists in the market.



ROSÉ  
CREDIT: GILBERT FLORES

UNITED STATES

+33%

U.S. superfans are +33% more likely to listen to artists from outside their own market when compared with the average U.S. music listener.

JAPAN

+35%

Japanese superfans are +35% more likely to listen to artists from outside their own market when compared with the average Japan music listener.

INDIA

+23%

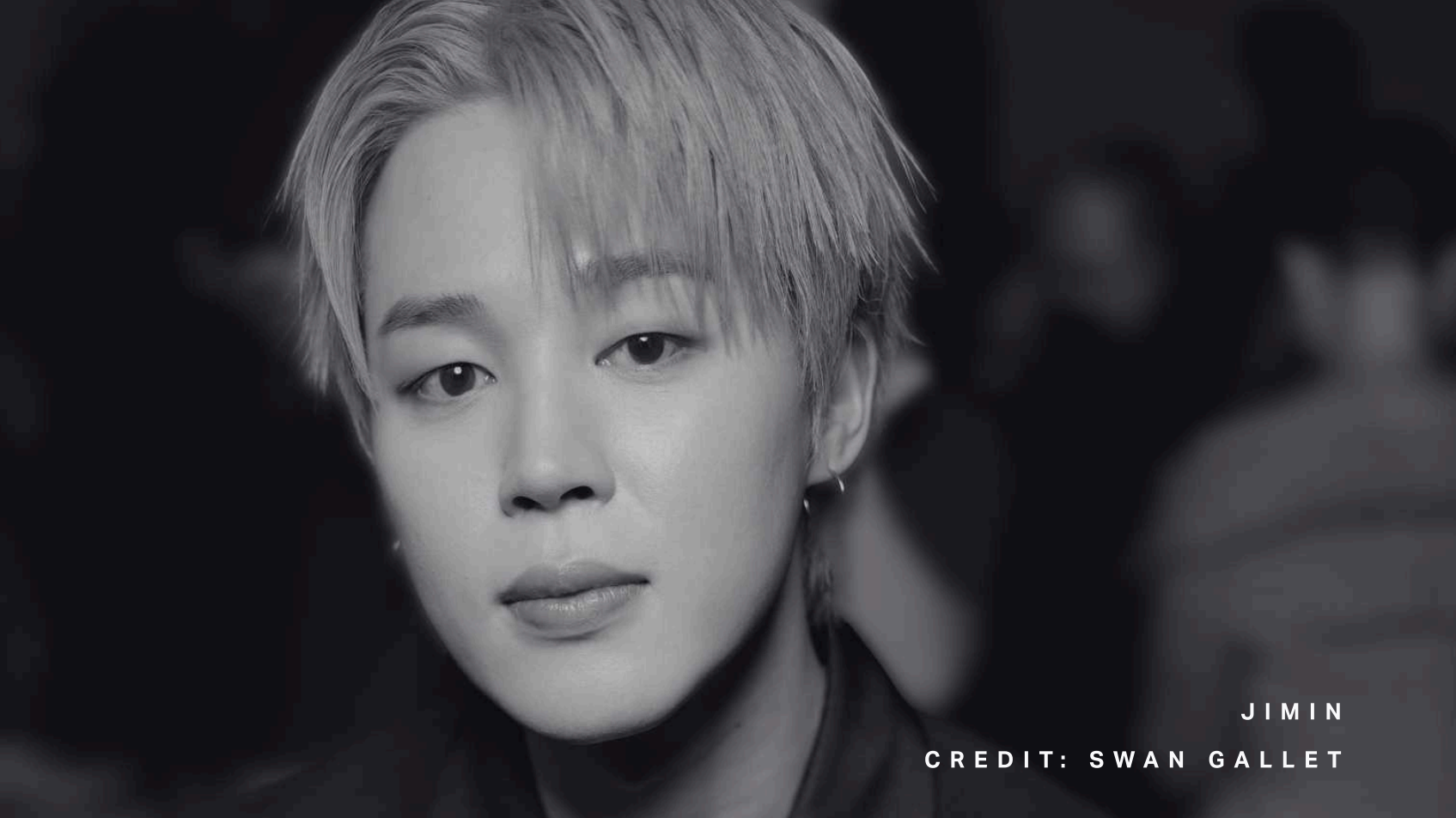
India superfans are +23% more likely to listen to artists from outside their own market when compared with the average India music listener.

SOURCE: LUMINATE INSIGHTS MUSIC 360 (GLOBAL);



# Top 5 Attributes of Superfans

Superfandom can look different depending on the audience and market. For instance, in the U.S. and Japan, the purchase of physical music and merch rank in the Top 5 activities among superfans. In India, there is an emphasis on buying digital music. One constant for these markets: attending live music events.



## UNITED STATES

Attend in-person live music performances

Talk about them with friends/family

Purchase physical merch

Purchase physical music

Attend virtual live music performances

## JAPAN

Attend in-person live music performances

Purchase physical music

Purchase physical merch

Purchase digital music

Subscribe to a fan club

## INDIA

Purchase digital music

Attend virtual live music performances

Attend in-person live music performances

Talk about them with friends/family

Post about them on social media

SOURCE: LUMINATE INSIGHTS MUSIC 360 (GLOBAL)



# Top 5 Sources of Music Discovery Among Superfans

Video and audio streaming platforms (DSPs) lead the way in music discovery for superfans, allowing listeners to quickly find and hear music from all over the world at the touch of a button. The sharing of tastes between friends and relatives also plays a key role in all of these regions, but so does the combination of screen and sound in finding new listeners, with each country including either movies/ movie soundtracks or television (or both) in the Top 5.



## UNITED STATES

Video and audio streaming platforms

Social media

Friends/relatives

Short-video clip sites (e.g., TikTok)

Movies/movie soundtracks

## JAPAN

Video and audio streaming platforms

Television

Short-video clip sites (e.g., TikTok)

Music-related websites (artists page, news)

Friends/relatives

## INDIA

Video and audio streaming platforms

Social media

Television

Movies/movie soundtracks

Friends/relatives

SOURCE: LUMINATE INSIGHTS MUSIC 360 (GLOBAL)



# U.S. Fan Engagement Funnel: Converting Music Listener to Superfan

In Luminate’s most recent audience response data, 20% of U.S. music listeners are considered superfans, meaning they engage with artists and music in 5 or more ways. However, 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 superfan status.

## FUNNEL LEVEL

(Showing % of music listeners)

### ALL MUSIC LISTENERS

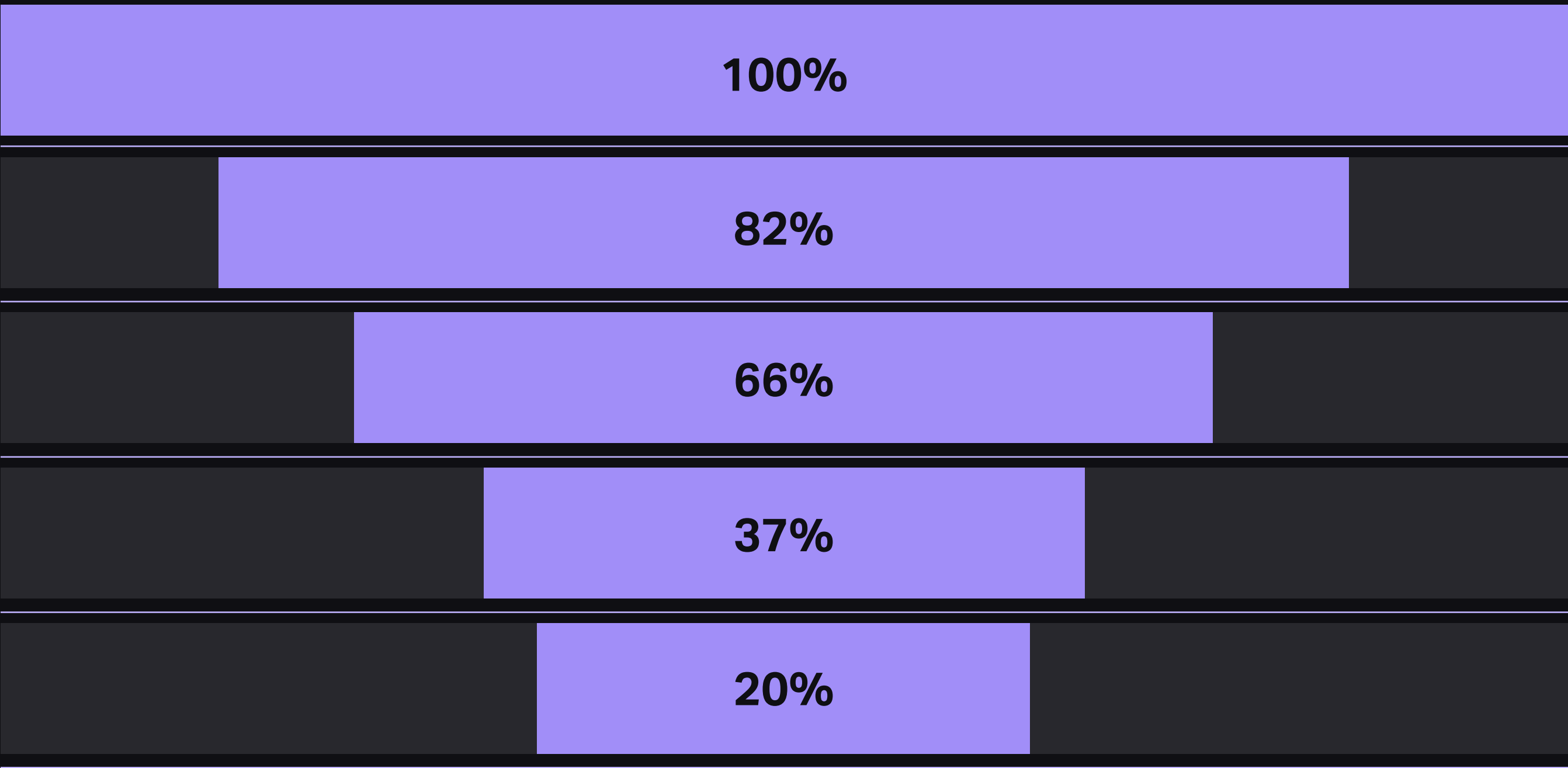
**Casual Fan:** Uses free/ad-supported or programmed streaming services

**Active Fan:** Paid DSP user OR casual fan (above) who purchases physical media

**Engaged Fan:** Paying fan who engages with artists on at least 3 of 13 different activation channels\*

**Superfan:** Consumer who engages with artists on at least 5 of 13 activation channels

## % OF MUSIC LISTENERS



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



# U.S. Genre-Level Fan Funnel

Focusing on the U.S. at genre level, conversion rates (e.g., the rate between each level) have marketing and fan engagement implications. Pop music is slightly better at converting engaged fans to superfans than Country. K-pop, where more than 1 in 3 listeners are categorized as a superfan, does very well at facilitating conversions throughout the entire journey. These insights can help marketers develop strategies to move fans from one stage to another. For instance, for those that want to move a casual fan to an active one, consider a limited time value-priced merch item to initiate the financial relationship.

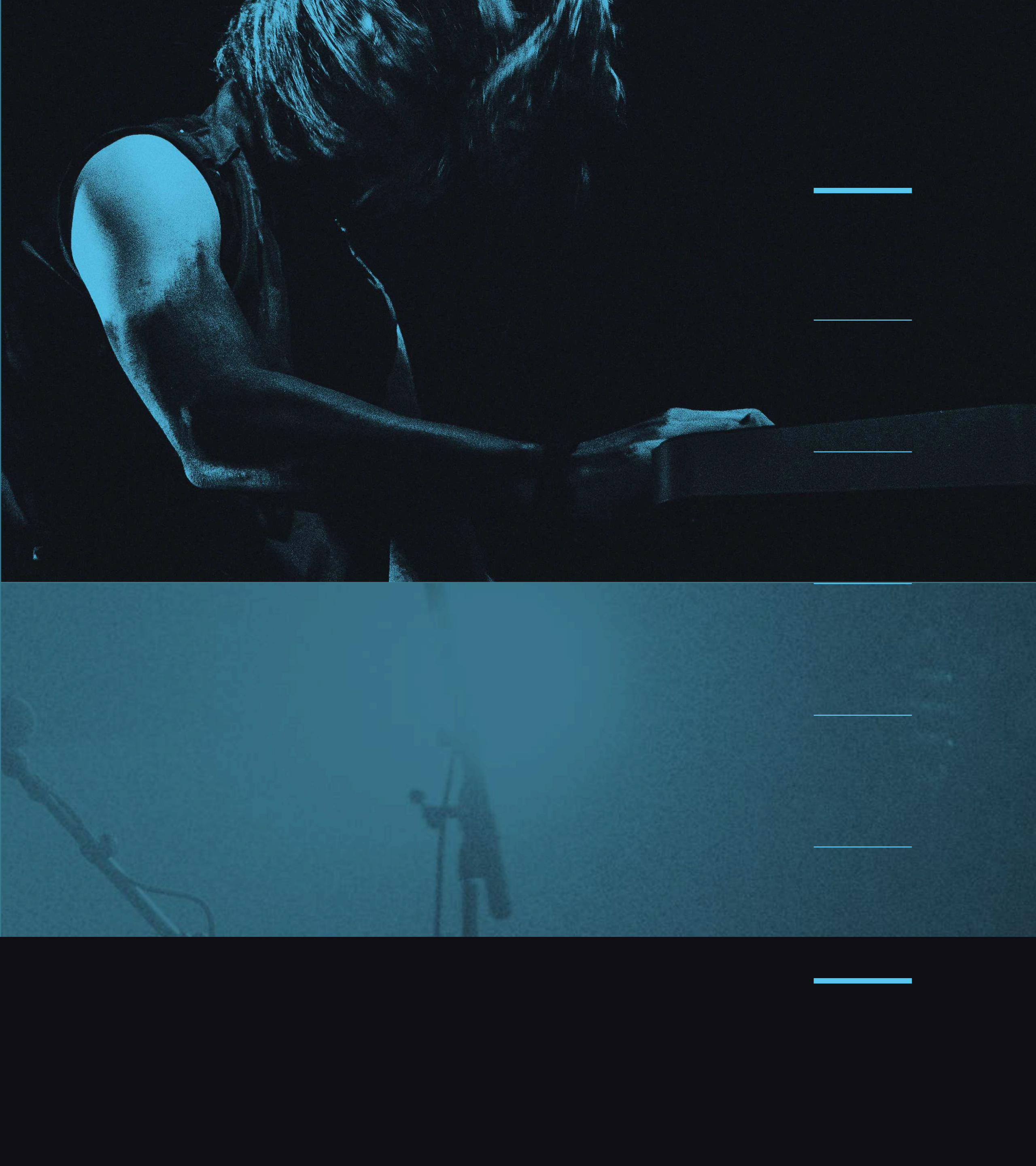
FUNNEL LEVEL (Showing % of Monthly Genre Listeners)	% OF POP LISTENERS (Conversion Rate)	% OF COUNTRY LISTENERS (Conversion Rate)	% OF K-POP LISTENERS (Conversion Rate)
All Music Listeners	100%	100%	100%
Casual Fan	86% (86%)	83% (83%)	87% (87%)
Active Fan	69% (80%)	65% (78%)	78% (71%)
Engaged Fan	42% (61%)	38% (58%)	55% (71%)
Superfan	26% (62%)	22% (58%)	34% (64%)

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



# AI ARTISTS

The second half of 2025 was marked by the emergence of several high-profile AI artists. The Velvet Sundown, Breaking Rust and Cain Walker all made headlines, but Xania Monet made news for not only streaming numbers and chart rankings but the reported \$3M advance the Mississippi poet creator, Telisha “Nikki” Jones, received. The arguments for paying this price? Proponents argue that AI artists can appear in different places at once, never get tired and can perform in multiple projects simultaneously. Once there's an audience, the brand commitments are limitless.





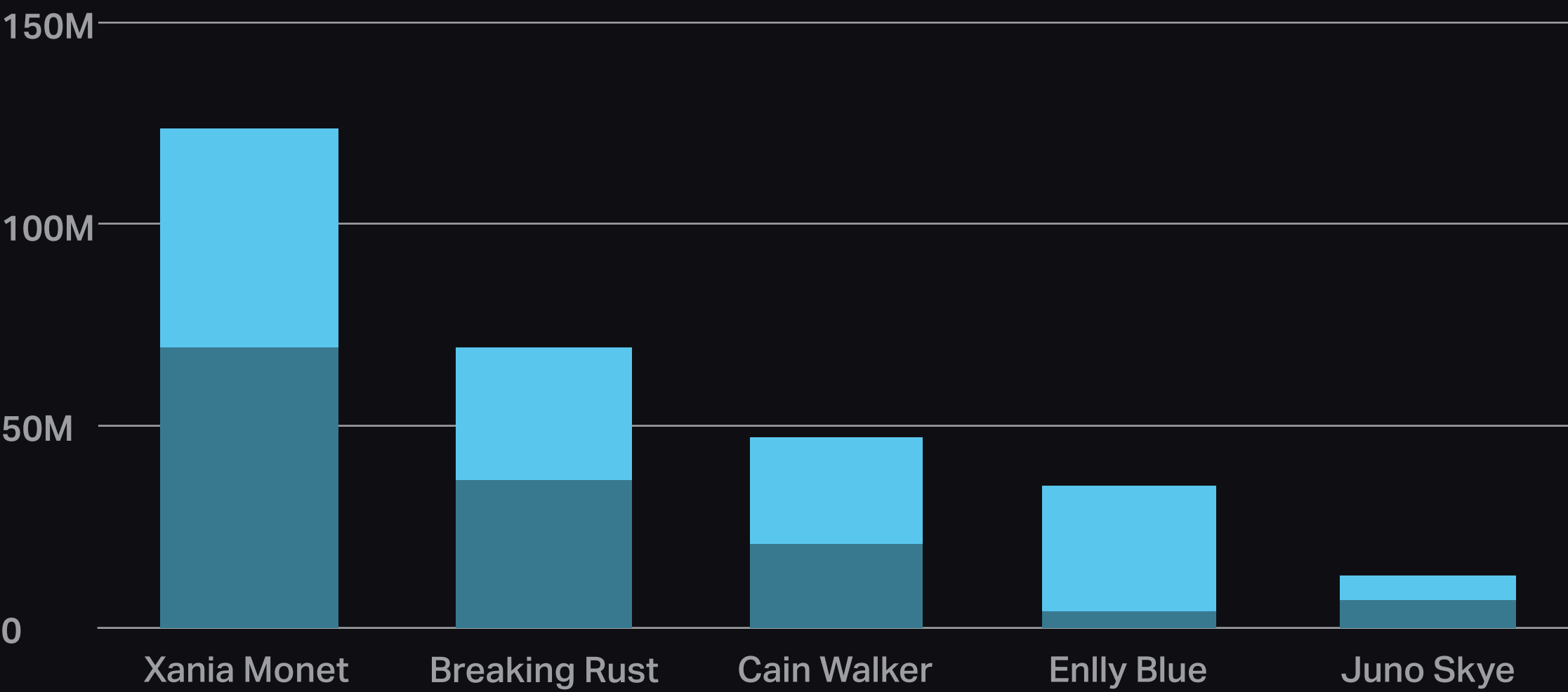
# AI Artists

Media attention around AI artists picked up momentum this year as The Velvet Sundown, Aventhis and others generated headlines over the summer. With outlets that include Billboard reporting upwards of a \$3M advance to Mississippi poet Telisha “Nikki” Jones for her artist creation, Xania Monet, and subsequent news of AI country genre artists Breaking Rust and Cain Walker reaching the top of the Billboard U.S. Country Digital Song Sales charts, additional headlines developed. It’s worth noting that only Xania Monet hit the Top 97th percentile of U.S. artists, and the decline of U.S. digital song sales means it doesn’t take as many to reach the height of those charts than it used to. For reference, Breaking Rust topped the Billboard Country Digital Song Sales chart in week 44 2025 (week ending 11/6/25) with 2.5K sales of “Walk My Walk.” One year earlier in week 44 2024, Morgan Wallen topped it with 5.2K sales of “Love Somebody” (week ending 10/31/24), and five years prior in week 44 2020, Luke Combs achieved 11.1K sales of “Forever After All” (week ending 11/5/20) to rank first.

## SELECT AI ARTISTS: ON-DEMAND AUDIO STREAMS

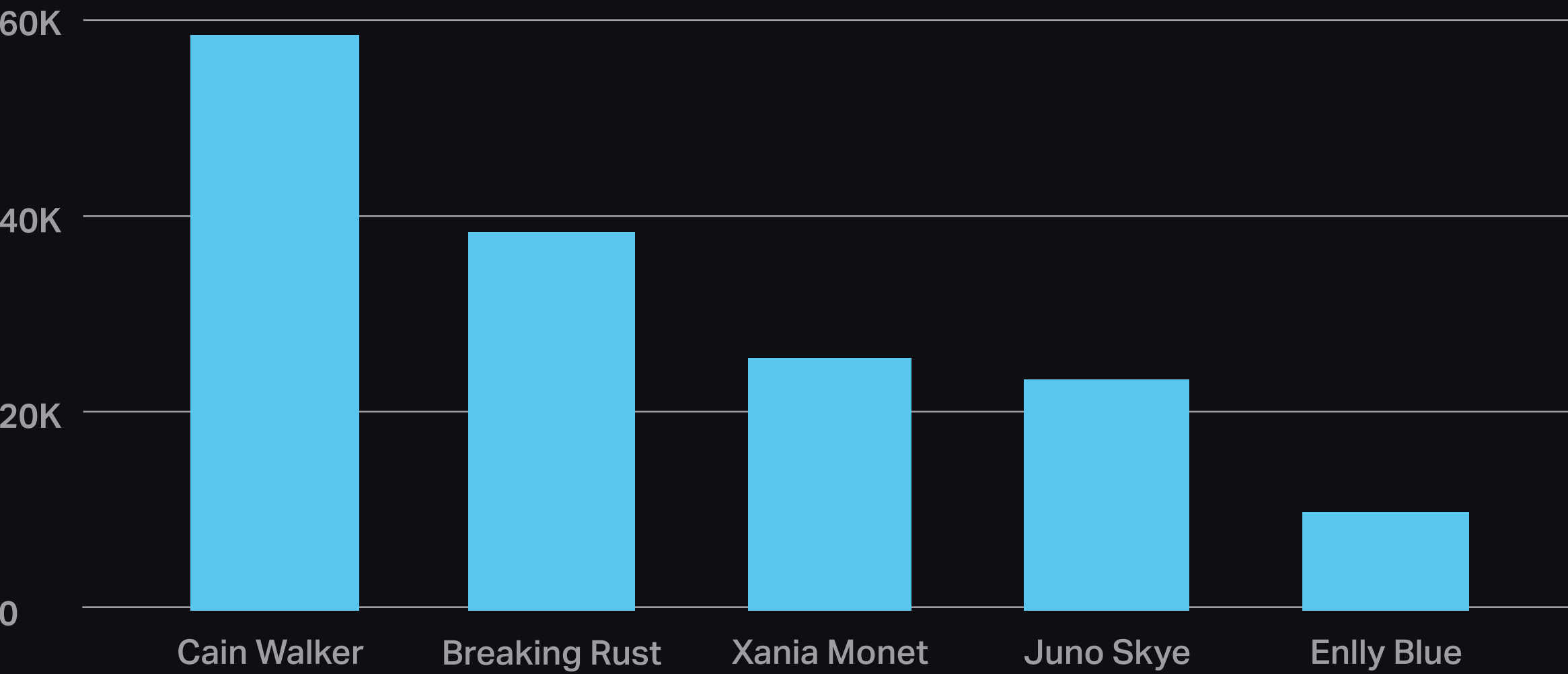
FY 2025

Ex-U.S. ODA    U.S. ODA



## SELECT AI ARTISTS: U.S. SONG SALES

FY 2025



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



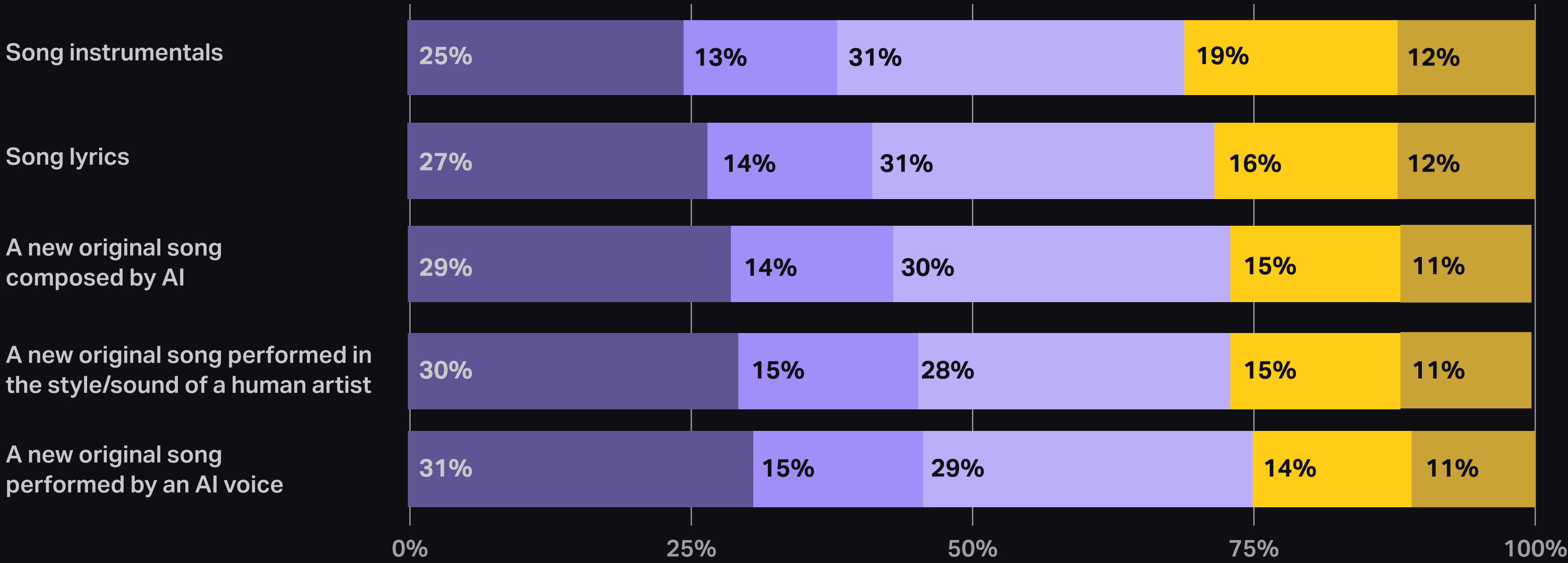
# Generative AI & Music Creation

While roughly a quarter to a third of U.S. music listeners are comfortable with various song elements being created with AI, a much larger share are either uncomfortable or indifferent.

## COMFORT LEVELS WITH AI MUSIC

Among music listeners

Very Uncomfortable    Somewhat Uncomfortable    Indifferent    Somewhat Comfortable    Very Comfortable



44%

of music listeners say they would be less interested in listening to music if they knew it was produced using generative AI.

SOURCE: LUMINATE INSIGHTS ENTERTAINMENT 365 (U.S.)

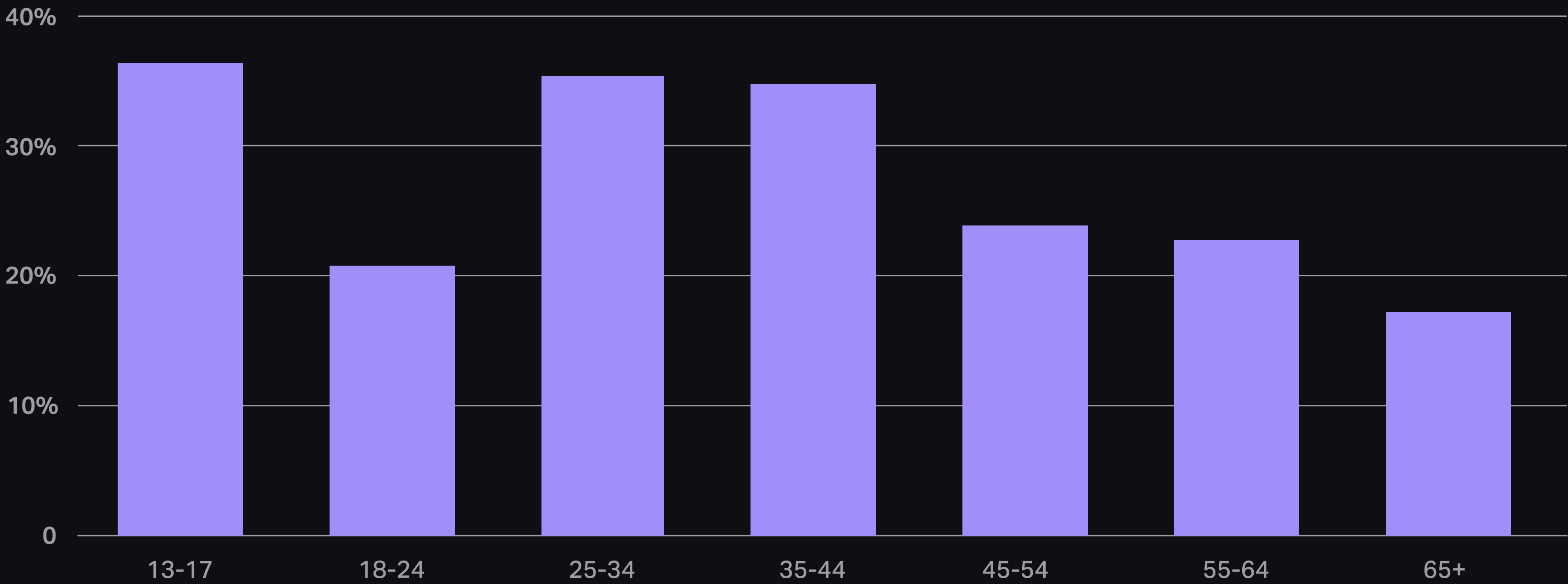


# AI Music Perspectives Among Generations

Millennials are the most comfortable with generative AI's use in music, with 36% expressing comfortability with AI's use in song lyrics. Another group, 13-17-year-olds, are also relatively comfortable with its use (37%). However, it is important to remember that the remaining 63% are either indifferent or uncomfortable.

## PERCENT EITHER "VERY" OR "SOMEWHAT" COMFORTABLE WITH AI-GENERATED LYRICS

Among music listeners, by age group



21%

The greatest reticence toward AI's use in music is among 18-24-year-olds (21% comfortable), consumers aged 45 or older (22%) and women across generations (23%).

SOURCE: LUMINATE INSIGHTS ENTERTAINMENT 365 (U.S.)



# YEAR-END CHARTS



# 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	On-Demand Audio Streams
1	Lady Gaga & Bruno Mars	“Die With A Smile”	2.858 billion
2	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“Golden”	2.430 billion
3	Alex Warren	“Ordinary”	2.403 billion
4	ROSÉ & Bruno Mars	“APT.”	2.326 billion
5	Billie Eilish	“BIRDS OF A FEATHER”	2.133 billion
6	Bad Bunny	“DtMF”	1.701 billion
7	Kendrick Lamar & SZA	“luther”	1.672 billion
8	Benson Boone	“Beautiful Things”	1.630 billion
9	sombr	“back to friends”	1.587 billion
10	Gracie Abrams	“That’s So True”	1.544 billion

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# Global Top 10 Songs

On-Demand Video streams

	Artist	Title	On-Demand Video Streams
1	CoComelon	“Wheels On The Bus”	2.016 billion
2	ROSÉ & Bruno Mars	“APT.”	1.403 billion
3	Lady Gaga & Bruno Mars	“Die With A Smile”	1.266 billion
4	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“Golden”	1.146 billion
5	Aishwarya Majmudar	“Aaj Ni Raat”	0.747 billion
6	Tanishk Bagchi, Faheem Abdullah, Arslan Nizami, Irshad Kamil	“Saiyaara”	0.740 billion
7	Lalit Sen, Chander	“Shree Hanuman Chalisa”	0.705 billion
8	Afusic & AliSoomroMusic	“Pal Pal”	0.648 billion
9	Pinkfong	“Baby Shark”	0.628 billion
10	El Payaso Plim Plim	“Abejita Chiquitita”	0.554 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	Taylor Swift	<i>The Life Of A Showgirl</i>	5.607 million	3,985,000	188,000	2.030 billion	63.4 million
2	Morgan Wallen	<i>I'm The Problem</i>	5.125 million	329,000	417,000	6.049 billion	246.6 million
3	SZA	<i>SOS</i>	2.599 million	142,000	78,000	3.219 billion	141.3 million
4	Soundtrack	<i>KPop Demon Hunters</i>	2.422 million	366,000	400,000	2.605 billion	205.9 million
5	Bad Bunny	<i>DeBÍ TiRAR Más FOToS</i>	2.393 million	92,000	84,000	2.963 billion	197.7 million
6	Kendrick Lamar	<i>GNX</i>	2.216 million	399,000	186,000	2.359 billion	150.3 million
7	Sabrina Carpenter	<i>Short n' Sweet</i>	2.046 million	413,000	128,000	2.114 billion	81.7 million
8	Morgan Wallen	<i>One Thing At A Time</i>	1.949 million	46,000	92,000	2.458 billion	120.9 million
9	PARTYNEXTDOOR & Drake	<i>\$ome \$exy \$ongs 4 U</i>	1.766 million	66,000	112,000	2.192 billion	97.8 million
10	Tate McRae	<i>So Close To What</i>	1.630 million	167,000	71,000	1.889 billion	52.2 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, 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	Taylor Swift	<i>The Life of a Showgirl</i>	3,985,000
2	Stray Kids	<i>KARMA</i>	585,000
3	The Weeknd	<i>Hurry Up Tomorrow</i>	543,000
4	Stray Kids	<i>DO IT</i>	460,000
5	Sabrina Carpenter	<i>Man’s Best Friend</i>	431,000
6	Sabrina Carpenter	<i>Short n’ Sweet</i>	413,000
7	Kendrick Lamar	<i>GNX</i>	399,000
8	Soundtrack	<i>KPop Demon Hunters</i>	366,000
9	Morgan Wallen	<i>I’m The Problem</i>	329,000
10	Lady Gaga	<i>MAYHEM</i>	292,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# U.S. Top 10 CD Albums

Total sales

	Artist	Title	Sales
1	Taylor Swift	<i>The Life of a Showgirl</i>	1,957,000
2	Stray Kids	<i>KARMA</i>	524,000
3	Stray Kids	<i>DO IT</i>	456,000
4	ENHYPEN	<i>DESIRE : UNLEASH</i>	261,000
5	ATEEZ	<i>GOLDEN HOUR : PART 3</i>	223,000
6	Stray Kids	<i>HOP</i>	223,000
7	KATSEYE	<i>BEAUTIFUL CHAOS</i>	186,000
8	The Weeknd	<i>Hurry Up Tomorrow</i>	176,000
9	Travis Scott & JACKBOYS	<i>JACKBOYS 2</i>	170,000
10	TOMORROW X TOGETHER	<i>The Star Chapter: TOGETHER</i>	168,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# U.S. Top 10 Vinyl Albums

Total sales

	Artist	Title	Sales
1	Taylor Swift	<i>The Life of a Showgirl</i>	1,601,000
2	Sabrina Carpenter	<i>Man’s Best Friend</i>	292,000
3	Kendrick Lamar	<i>GNX</i>	279,000
4	Sabrina Carpenter	<i>Short n’ Sweet</i>	262,000
5	Billie Eilish	<i>HIT ME HARD AND SOFT</i>	192,000
6	Fleetwood Mac	<i>Rumours</i>	190,000
7	Michael Jackson	<i>Thriller</i>	182,000
8	The Weeknd	<i>Hurry Up Tomorrow</i>	178,000
9	Taylor Swift	<i>Lover (Live From Paris)</i>	166,000
10	Tyler, The Creator	<i>IGOR</i>	166,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# U.S. Top 10 Cassette Albums

Total sales

	Artist	Title	Sales
1	Taylor Swift	<i>The Life of a Showgirl</i>	27,000
2	Soundtrack	<i>Guardians of the Galaxy: Awesome Mix Vol. 1</i>	18,000
3	Chappell Roan	<i>The Rise and Fall of a Midwest Princess</i>	12,000
4	Soundtrack	<i>Guardians of the Galaxy, Vol. 2: Awesome Mix Vol. 2</i>	11,000
5	C418	<i>Minecraft - Vol. Beta</i>	9,000
6	Nirvana	<i>Bleach</i>	8,000
7	Ghost	<i>Skeletá</i>	8,000
8	Mac Miller	<i>Balloonism</i>	7,000
9	Charli xcx	<i>BRAT</i>	7,000
10	Sabrina Carpenter	<i>Man’s Best Friend</i>	6,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# U.S. Top 10 Digital Song Consumption

Songs Sales + On-Demand SES\*

	Artist	Song	Song Sales + SES On-Demand Streams	Total On-Demand Streams	Song Sales
1	Alex Warren	“Ordinary”	6.024 million	813.2 million	238,000
2	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“Golden”	5.416 million	770.0 million	68,000
3	Kendrick Lamar & SZA	“luther”	5.205 million	791.8 million	147,000
4	Lady Gaga & Bruno Mars	“Die With A Smile”	4.874 million	752.0 million	126,000
5	Morgan Wallen	“I'm the Problem”	4.618 million	627.2 million	85,000
6	Teddy Swims	“Lose Control”	4.573 million	653.0 million	110,000
7	Kendrick Lamar	“Not Like Us”	4.306 million	593.4 million	127,000
8	Shaboozey	“A Bar Song (Tipsy)”	4.252 million	636.4 million	118,000
9	Benson Boone	“Beautiful Things”	4.180 million	590.7 million	124,000
10	Chappell Roan	“Pink Pony Club”	4.046 million	539.2 million	173,000

SOURCE: LUMINATE MUSIC CONSUMPTION DATA  
\* 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 + Video streams

	Artist	Title	Total On-Demand Streams
1	Alex Warren	“Ordinary”	812.6 million
2	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“Golden”	791.5 million
3	Kendrick Lamar & SZA	“luther”	769.2 million
4	Lady Gaga & Bruno Mars	“Die With A Smile”	751.6 million
5	Teddy Swims	“Lose Control”	652.6 million
6	Kendrick Lamar	“Not Like Us”	636.1 million
7	Morgan Wallen	“I’m The Problem”	626.9 million
8	Shaboozey	“A Bar Song (Topsy)”	592.7 million
9	Benson Boone	“Beautiful Things”	590.3 million
10	Billie Eilish	“BIRDS OF A FEATHER”	572.8 million

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# U.S. Top 10 Songs

On-Demand Audio streams

	Artist	Title	On-Demand Audio Streams
1	Alex Warren	“Ordinary”	746.2 million
2	Kendrick Lamar & SZA	“luther”	714.4 million
3	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“Golden”	656.1 million
4	Lady Gaga & Bruno Mars	“Die With A Smile”	611.8 million
5	Morgan Wallen	“I’m The Problem”	578.4 million
6	Teddy Swims	“Lose Control”	558.1 million
7	Shaboozey	“A Bar Song (Topsy)”	527.2 million
8	Kendrick Lamar	“Not Like Us”	524.0 million
9	The Marías	“No One Noticed”	516.8 million
10	Billie Eilish	“BIRDS OF A FEATHER”	511.8 million

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# U.S. Top 10 Songs

On-Demand Video streams

	Artist	Title	On-Demand Video Streams
1	Lady Gaga & Bruno Mars	“Die With A Smile”	139.7 million
2	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“Golden”	135.4 million
3	CoComelon	“Wheels On The Bus”	131.9 million
4	ROSÉ & Bruno Mars	“APT.”	119.7 million
5	Kendrick Lamar	“Not Like Us”	112.1 million
6	Saja Boys: Andrew Choi, Neckwav, Danny Chung, Kevin Woo & samUIL Lee	“Your Idol”	105.8 million
7	Teddy Swims	“Lose Control”	94.4 million
8	Benson Boone	“Beautiful Things”	85.0 million
9	Saja Boys: Andrew Choi, Neckwav, Danny Chung, Kevin Woo & samUIL Lee	“Soda Pop”	81.2 million
10	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“How It’s Done”	76.5 million

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# U.S. Top 10 Songs

Programmed Audio streams

	Artist	Title	Programmed Audio Streams
1	Teddy Swims	“Lose Control”	176.7 million
2	Shaboozey	“A Bar Song (Topsy)”	120.7 million
3	Morgan Wallen	“I’m The Problem”	118.6 million
4	Teddy Swims	“Bad Dreams”	96.6 million
5	Teddy Swims	“The Door”	96.1 million
6	Shaboozey	“Good News”	95.8 million
7	Post Malone featuring Morgan Wallen	“I Had Some Help”	95.6 million
8	Benson Boone	“Beautiful Things”	91.4 million
9	Chris Stapleton	“Tennessee Whiskey”	90.4 million
10	Creedence Clearwater Revival	“Have You Ever Seen The Rain”	86.8 million

SOURCE: LUMINATE MUSIC CONSUMPTION DATA / NOTE: PROGRAMMED STREAMS ARE THOSE FROM DMCA-COMPLIANT SERVICES.



# U.S. Top Radio Songs

Based on audience impressions

	Artist	Title	Audience
1	Lady Gaga & Bruno Mars	“Die With A Smile”	3.054 billion
2	Alex Warren	“Ordinary”	2.769 billion
3	Shaboozey	“A Bar Song (Topsy)”	2.709 billion
4	Kendrick Lamar & SZA	“luther”	2.538 billion
5	Sabrina Carpenter	“Espresso”	2.313 billion
6	Myles Smith	“Stargazing”	2.297 billion
7	Leon Thomas	“MUTT”	2.162 billion
8	Billie Eilish	“BIRDS OF A FEATHER”	2.148 billion
9	Teddy Swims	“Lose Control”	2.101 billion
10	Benson Boone	“Beautiful Things”	2.031 billion

SOURCE: MEDIABASE, LUMINATE METRO RADIO STREAMING



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

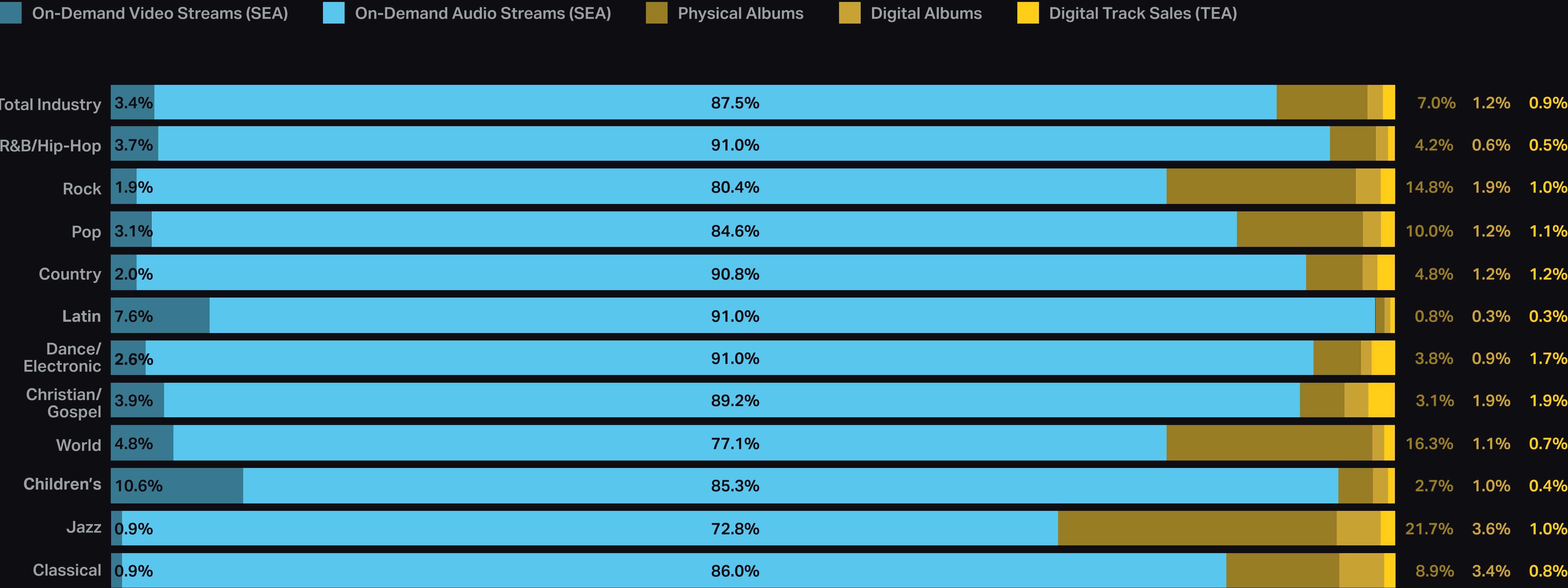
Selected top genres

	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	23.9%	25.1%	24.9%	27.3%	13.7%	14.1%	11.6%	14.0%
2	Rock	20.6%	18.0%	18.6%	11.2%	41.8%	43.3%	33.0%	23.6%
3	Pop	12.4%	11.8%	11.9%	11.0%	16.9%	17.5%	13.3%	15.7%
4	Country	8.7%	8.4%	8.7%	5.0%	6.3%	5.9%	8.9%	12.0%
5	Latin	7.8%	9.4%	8.6%	17.9%	1.0%	0.8%	1.7%	2.7%
6	Dance/Electronic	3.6%	3.6%	3.7%	2.7%	2.0%	1.9%	2.8%	6.9%
7	World Music	2.5%	2.3%	2.2%	3.4%	5.2%	5.6%	2.2%	2.0%
8	Christian/Gospel	2.1%	2.2%	2.1%	2.4%	1.3%	1.0%	3.5%	4.6%
9	Children’s	1.2%	1.3%	1.1%	3.4%	0.5%	0.5%	1.0%	0.7%
10	Jazz	1.0%	0.7%	0.8%	0.3%	3.0%	3.0%	3.0%	1.1%
11	Classical	0.9%	0.8%	0.8%	0.2%	1.3%	1.1%	2.6%	0.8%

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# U.S. Share of Total Album-Equivalent Consumption, by Format



SOURCE: LUMINATE MUSIC CONSUMPTION DATA



# 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>I'm the Problem</i>	481,000	11,000	40,000	595.8 million	14.7 million
2	Taylor Swift	<i>The Life Of A Showgirl</i>	408,000	201,000	18,000	261.9 million	8.8 million
3	HUNTR/X, Saja Boys, <i>Kpop Demon Hunters</i> cast	<i>Kpop Demon Hunters</i>	255,000	19,000	42,000	304.3 million	20.3 million
4	The Weeknd	<i>The Highlights</i>	246,000	3,000	7,000	329.2 million	14.9 million
5	Tate McRae	<i>So Close To What</i>	235,000	12,000	9,000	289.2 million	7.6 million
6	Alex Warren	<i>You'll Be Alright, Kid (Chapter 1)</i>	228,000	3,000	40,000	291.3 million	12.0 million
7	SZA	<i>SOS</i>	205,000	4,000	4,000	270.9 million	5.6 million
8	Sabrina Carpenter	<i>Short n' Sweet</i>	204,000	20,000	12,000	241.2 million	9.1 million
9	Morgan Wallen	<i>One Thing at a Time</i>	202,000	2,000	8,000	261.0 million	7.3 million
10	Noah Kahan	<i>Stick Season</i>	195,000	6,000	7,000	244.6 million	3.2 million

SOURCE: LUMINATE MUSIC CONSUMPTION DATA  
NOTE: 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	Alex Warren	“Ordinary”	114.5 million
2	Shaboozey	“A Bar Song (Topsy)”	84.6 million
3	HUNTR/X: EJAE, Audrey Nuna & REI AMI	“Golden”	83.2 million
4	Benson Boone	“Beautiful Things”	80.0 million
5	Lady Gaga & Bruno Mars	“Die With A Smile”	75.9 million
6	ROSÉ & Bruno Mars	“APT.”	70.1 million
7	Chappell Roan	“Pink Pony Club”	68.7 million
8	Teddy Swims	“Lose Control”	68.0 million
9	Post Malone featuring Morgan Wallen	“I Had Some Help”	67.8 million
10	Gracie Abrams	“That’s So True”	66.1 million

SOURCE: LUMINATE MUSIC CONSUMPTION DATA



## CONSUMPTION METRICS & VITAL STATS

Luminate’s 2024 tracking year ran 1/29/23-1/2/25, and included 53 weeks due to a rare calendar occurrence. While the 2025 tracking year included a standard 52-week calendar, year-over-year comparisons in the Consumption Metrics & Vital Stats section compare 2025 Weeks 1-52 vs. 2024 Weeks 2-53 in order to achieve a synchronized calendar (1/3/25-1/1/26 vs. 1/5/24-1/2/25).

## 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 country; the streaming size of importing countries; and the number of artists per export country reaching international audiences.

## YEAR-END CHARTS

Year-end charts starting on page 62 are pulled via Music Connect (excl. Cassettes data and U.S. genre shares). All other music consumption data points were pulled from CONNECT, the all-new Luminate data platform.

## DATA ENRICHMENT

Data enrichment brings together data from the top recordings of the year and information about the songwriters of those recordings. This analysis is based on the top 10,000 songs worldwide ranked by On-Demand Audio streams for Week 1 to Week 45 of 2025. Tracks often have multiple songwriters, so the counts of songwriter and streams are based on a one-to-many relationship. Any recordings with no associated songwriter information were excluded from this 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) each contribute to the composite score, with some lending more or less to the score than others.



WHAT DETERMINES A SUPERFAN?

A superfan is someone who engages with artists and their content in many ways. The data Luminate collects 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 an artist in person or virtually; purchase virtual merchandise; directly fund the artist (e.g., Venmo, CashApp, Patreon).

WHAT IS SHAREPOINT CHANGE?

Throughout this report, there are references to “sharepoint change.” One example of this is in the “Highest Growth Genres in the U.S.” section, where Rock shows a +.3 gain relative to other musical 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.

NEW METRIC: INTERACTIVE STREAMS

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. Since this new metric was introduced in 2025, there is no historical trending, however future reports will include trended detail.

WHAT ARE THE TREND BREAKS IN 2025?

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



# Data Sources

This *2025 Year-End Music Report* is powered by Luminate’s industry-leading consumption data, consumer behavior data and metadata, and products are commercially available. To learn more about how to access the data and products, please contact us [here](#).

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## MUSIC CONSUMPTION BY CONNECT

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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 48 global markets.

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## U.S. MUSIC 360 & REGIONAL MUSIC 360

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

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## ARTIST + GENRE TRACKER

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

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## FILM & TV METADATA

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

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## U.S. ENTERTAINMENT 365

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

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## LUMINATE INDEX

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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.

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## STREAMING VIEWERSHIP MODEL (SVM)

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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.







YEAR-END MUSIC REPORT  
/2025

IF YOU HAVE ANY QUESTIONS, PLEASE  
CONTACT US [HERE](#).

