2023
Luminate Midyear Music Report
LUMINATE
Introduction

In March of this year, Luminate’s data revealed that the global music industry surpassed ONE TRILLION streams at the fastest pace yet from the start of a calendar year — taking only three months. That milestone was reached a full month earlier in 2023 than it was in 2022. Our data also revealed that physical sales were up across all formats in Q1 and that ISRCs (tracks) were being created and uploaded at higher volumes and pace than in previous years. In the following report, we explore these trends and how they are defining the state of the music industry in the first half of 2023.

As always, we hope our findings are both informative and enlightening. Luminate is committed to being a trusted, objective and accurate data source reflecting and serving the entertainment industry at-large, helping to bridge gaps in any business planning. The Charts included in this report are presented by Billboard, Luminate’s exclusive chart partner for more than three decades.

ABOUT LUMINATE

Luminate is the preeminent entertainment data and insights company, unleashing access to the most essential, objective, and trustworthy information across music, film, television, gaming, short-form video and more. Luminate’s databases house information compiled from over 500 verified sources, managing more than 20 trillion data points.
Now more than ever, fans hold the power of influence — shaping the ways their favorite artists make, market and release music. And while our data shows that collectable-loving super fans are still a significant part of the years-long vinyl sales growth trend, it's significant to note that the growth in Direct-to-Consumer (D2C) sales of music from artists' stores are up +20% so far this year, with D2C vinyl sales up over +25%. This stat only highlights the ever-increasing power of the super fan.

What is a super fan? For the purposes of this report, Luminate's research methodology defines a “super fan” as a music listener aged 13+ who engages with an artist and their content in multiple ways, from streaming to social media to purchasing physical music or merch items to attending live shows. More specifically, the super fans who were identified in the studies referenced in this report were participants that self-reported engaging with their favorite artists in 5+ ways.

The findings of this report further dive into the behaviors of these super fans, who account for 15% of the general population of music listeners 13+ in the U.S., and how they are influencing the evolution of music and artists' relationships with their listeners. A few insights revealed by the report include the fact that physical music buyers, people who purchase CDs, cassettes, or vinyl, are more than 2x as likely (+128%) to be music super fans. They also spend more than 80% more money on music each month than the average music listener.

Understanding these consumer behaviors and evaluating them in the context of our engagement data fuels the useful insight of this report and hopefully, makes it a valuable tool for industry experts making a wide range of business decisions; from how to price vinyl to which artist/brand partnerships are most valuable and everything in between.
It's no secret that non-English language music has grown in popularity, both in the U.S. and globally over the past ten years, especially within the Latin and K-Pop genres, both of which have both seen unprecedented sales and streaming growth. But how many music listeners are actually engaging with that content? According to Luminate’s Music 360 research data from Q2 2023, 40% of U.S. listeners listen to music in a language other than English. Spanish, French, Korean, Japanese, Italian, German, and Arabic, in that order, are the most popular music languages among U.S. music listeners.

Boundaries continue to be broken across language and geography in this digitally-driven era. Another example is visible in Country. The Country genre has historically been consumed by English speaking Americans.

The first half of 2023 has seen Country go global. In March, Luminate reported that Country music had its biggest streaming week ever with 2.22 billion U.S. On-Demand audio (ODA) streams, partially due to the release of Morgan Wallen’s One Thing at a Time, which delivered over 20% of the genre’s streams during its release week. The genre reached a new high the week ending 6/1/23 with 2.26B U.S. ODA streams.

Simultaneously, we’re seeing Country streaming boom across multiple international markets. Philippines, Indonesia, India, Brazil, Mexico, Germany, and Vietnam, none of which are primarily English-speaking territories, are all Top 10 markets for Country music consumption in the first half of 2023. This report breaks out these numbers and provides analysis on the demographics of listeners across the genres and the globe bringing these new trends into focus.
In May, Luminate revealed that in Q1 of 2023 an average of 120K ISRCs (new tracks registered to a unique number) were uploaded to the streaming platforms every day, representing a 28% increase over 2022's whole year average of 93.4K ISRC's per day. When we include the Q2 2023 activity, our daily average is now 112K songs.

In this report we breakdown how many of those ISRCs come from major label distribution vs. the rest of the industry. We also know this conversation needs to include the AI of it all, especially as intelligent tools increase the speed with which music can be made and released. One of this year’s most infamous songs, “Heart on My Sleeve” by Ghostwriter, was produced with the use of AI, which generate soundalike vocals that emulated the artists Drake and The Weeknd. The song, which initially took off in the U.S., spread quickly to other markets and received more than 30K streams per day in a two-week period from Australia, Canada, Germany and the United Kingdom alone — forcing the music industry to consider AI’s potential global impact.

Beyond the deep fake hits this report also examines the increasing demand for mood music, which creators using AI can produce more easily, and how audiences’ behaviors tied to mood and music are changing.

Bands, Brands & Super Fans
Locals, Lyrics & Language
The Impacts of New Tracks
Contents

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Midyear in Metrics

Bands, Brands & Super Fans

Locals, Lyrics & Languages

Impacts of New Tracks

Midyear Charts

Date Range for Consumption Data: 12/31/21 - 6/30/22 vs. 12/30/22 - 6/29/23
Midyear Metrics

12/30/22 - 6/29/23 (As Compared To 12/31/2021-6/30/2022)
Global Metrics

Total On-Demand Song Streams (Audio + Video)
- 2022+: 2.5 T
- 2023+: 3.3 T
- Vol. Change: +30.8%

Total On-Demand Audio Song Streams
- 2022+: 1.6 T
- 2023+: 2.0 T
- Vol. Change: +22.9%

*SEA STREAM EQUIVALENT ALBUMS: 1250 PREMIUM STREAMS = ONE ALBUM / 3750 AD-SUPPORTED STREAMS = ONE ALBUM / TRACK (EQUIVALENT ALBUMS) / 10 DIGITAL TRACKS = ONE ALBUM
** CATALOG = 18 MONTHS OR OLDER AND HAVE NOT FALLEN BELOW NO. 100 ON THE BILLBOARD 200 CHART AND DON'T HAVE A SINGLE FROM THE ALBUM THAT'S CURRENTLY AT THE TOP OF BILLBOARD'S RADIO AIRPLAY CHARTS
ON-DEMAND VIDEO SONG STREAMING INCLUDES OFFICIAL SONG UGC AND NON-SONG UGC
# U.S. Metrics

**Total Album Consumption**
- **Album + TEA + On-Demand SEA**
  - 2022+: 475.4M
  - 2023+: 538.9M
  - **Change**: +13.4%

**Total Digital Music Consumption**
- **Digital Albums + TEA + On-Demand SEA**
  - 2022+: 438.9M
  - 2023+: 497.5M
  - **Change**: +13.4%

**On-Demand Song Streaming**
- **Audio + Video**
  - 2022+: 620.2B
  - 2023+: 713.5B
  - **Change**: +15.0%

**On-Demand Streaming: Audio**
- 2022+: 543.2B
- 2023+: 616.5B
- **Change**: +13.5%

**Total Album Sales**
- **Physical + Digital**
  - 2022+: 46.9M
  - 2023+: 50.6M
  - **Change**: +7.9%

**Physical Album Sales**
- 2022+: 36.7M
- 2023+: 41.6M
- **Change**: +13.3%

**CD Album Sales**
- 2022+: 16.9M
- 2023+: 17.5M
- **Change**: +3.8%

**Vinyl LP Sales**
- 2022+: 19.4M
- 2023+: 23.6M
- **Change**: +21.7%

**Cassette Sales**
- 2022+: 200.5K
- 2023+: 212.1K
- **Change**: +5.8%

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* SEA (STREAM-EQUIVALENT ALBUMS): 1250 PREMIUM STREAMS + ONE ALBUM / 3750 AD-SUPPORTED STREAMS + ONE ALBUM + TEA (TRACK-EQUIVALENT ALBUMS): 10 DIGITAL TRACKS + ONE ALBUM ** CATALOG 18 MONTHS OR OLDER AND HAVE FALLEN BELOW NO. 100 ON THE BILLBOARD 200 CHART AND DON'T HAVE A SINGLE FROM THE ALBUM THAT IS CURRENT ON ANY OF BILLBOARD'S RADIO AIRPLAY CHARTS ** ON-DEMAND VIDEO SONG STREAMING INCLUDES OFFICIAL, SONG UGC AND NON-SONG UGC
U.S. Catalog vs. Current Consumption

Catalog Share
- 2022+: 72.4%
- 2023+: 72.8%

Current Share
- 2022+: 27.6%
- 2023+: 27.2%

Catalog Total Album Consumption
- 2022+: 344.1M
- 2023+: 392.1M
  +13.9% Vol. Change

Current Total Album Consumption
- 2022+: 131.3M
- 2023+: 146.8M
  +11.8% Vol. Change

* SEA (STREAM-EQUIVALENT ALBUMS): 1250 PREMIUM STREAMS + ONE ALBUM / 3750 AD-SUPPORTED STREAMS + ONE ALBUM + TEA (TRACK-EQUIVALENT ALBUMS): 10 DIGITAL TRACKS = ONE ALBUM
** CATALOG + 18 MONTHS ON OLDST BY AND HAVE FALLEN BELOW NO. 100 ON THE BILLBOARDS 200 CHART, AND DON'T HAVE A SONG ON THE CURRENT BILLBOARD HOT 100 CHARTS
  * OFF-DEMAND VIDEO SONG STREAMING INCLUDES OFFICIAL, SONG USG AND NON-USG USG
TREND 1

Bands, Brands & Super Fans
D2C Sales Up +20% Over 1H 2022 With D2C Vinyl Up 25%

- **Total Sales**: 4.4M (+20% YOY % Change)
- **Vinyl**: 3.6M (+26% YOY % Change)
- **CD**: 1.7M (+15% YOY % Change)
- **Cassette**: 62K (-14.6% YOY % Change)
Genre Share of Total D2C Sales

D2C Product Splits H1 2023

- Rock: 44.6%
- Pop: 16.5%
- R&B/Hip-Hop: 5.6%
- World: 9.6%
- Country: 10.9%
- Others: 12.8%

- Vinyl: 38.3%
- CD: 60.3%
- Cassette: 1.4%
Though category share is down since 2022, nearly 30% of U.S. cassette sales are via D2C.

1 in 9 U.S. vinyl album sales are via Direct-to-Consumer (ex. Official artist webstore).

D2C Vinyl and CD Share of Category Sales Grow Slightly Over This Period Last Year.
Counter to Trends in Streaming Consumption, Over 60% of Total D2C Product Sales are Current Releases and +75% of Both CDs and Cassettes Are Current.
D2C, Merch & Where to Buy

42% of U.S. Gen Z agree that they “wish artists provided more merchandise options so that I can show my support for them and their work.”

Gen Z are +33% more likely to plan on buying artist apparel in the next six months, and +32% more likely to plan on purchasing accessories compared to the US General Population (U.S. Gen Pop).

60% of the U.S. Gen Pop aged 13+ have purchased artist merchandise in the past.

The most popular place of purchase among U.S. Gen Pop aged 13+ for merch is from an in-person live music event (at 37% of Gen Pop).

Source: Luminate Insights Artist & Genre Tracker Wave 3 9/23
Luminate Insights US Music 389 Wave 2 11/2013
Understanding Super Fans

#1 Social Signaling
Super fans are +54% more likely to be “the first among their friends to discover new music and artists”

#2 Expressions of Identity
Super fans are +59% more likely to say they “would like to connect with artists on a more personal level”

#3 The Community
Super fans are +43% more likely to say they “like to participate in the community or fandom” that specific artists provide

*All figures cited on this slide are relative to the average music listener.
*Super fans are those who engage w/ artists and their content in 5+ different ways.
15% of the General Population are Super Fans

*Super Fans are those who engage w/artists and their content in 5+ different ways.
Super Fan Snapshots

+80%
Super fans spend +80% more money on music each month than the average U.S. music listener.

+128%
Physical music buyers (Vinyl/CDs/Cassettes) are more than 2x as likely (+128%) to be music Super Fans.

+22%
U.S. Millennial music listeners spend +22% more and Gen Z music listeners spend +13% more on monthly music categories compared to the average U.S. music listener.

*SUPER FANS ARE THOSE WHO ENGAGE WITH ARTISTS AND THEIR CONTENT IN 5+ DIFFERENT WAYS.
SOURCE: LUMINATE INSIGHTS US MUSIC 360 WAVE 2 6/2023
Super Fan Snapshots

K-Pop fans spend +75% more money on music categories per month than the average U.S. music listener.

Afropop/beats fans spend +121% more money on music categories per month than the average U.S. music listener.

EDM fans spend +63% more money on music categories per month than the average U.S. music listener.

*Super fans are those who engage with artists and their content in 5+ different ways. Source: Luminate Insights US Music 360 Wave 2 6/2023*
Compared to Other Major Genre* Fans, K-Pop Fans ...

- **+69%**
  - K-Pop fans are +69% more likely to purchase a vinyl record in the next 12 months

- **+67%**
  - K-Pop fans are +67% more likely to be motivated to purchase music by a desire to "show support" for artists

- **+46%**
  - K-Pop fans are +46% more likely to have purchased a CD record in the past 12 months

- **23%**
  - Almost 1 in 4 K-Pop fans have purchased a cassette in the past 12 months

All Categories Up, But Who's Buying?

Physical Product U.S. Store Strata

- Independent: 15.1M (-3.4%)
- Internet Mail Order: 6.3M
- Mass Merchant: 2.1M
- Chain: 17.6M (+4.2%)
- Non-Traditional Retail: 275K

Source: Luminate Music Connect Data
MUSIC SPEND INDICES REFLECT A COMPARISON TO MUSIC LISTENERS
SOURCE: LUMINATE INSIGHTS US MUSIC 360 WAVE 2 6/2023

CD Buyers
- Gen X (104)
- LGBTQ+ (112)
- Urban (110)
- Spend (181)

Cassette Buyers
- Gen Z (138)
- Male (146)
- Urban (200)
- Spend (259)

Vinyl Buyers
- Gen Z (133)
- LGBTQ+ (124)
- Urban (123)
- Spend (201)

Physical Music Buyers (Overall)
- Gen X (100)
- LGBTQ+ (112)
- Urban (116)
- Spend (177)
The Price of Vinyl

Knowing your audience is a priority as different fan groups have different price points.

$29.40
Jazz Fans
Optimum Vinyl Price

$25.80
’80s Decades Listeners
Optimum Vinyl Price

$19.60
Boomers
Optimum Vinyl Price

SOURCE: LUMINATE
INSIGHTS ARTIST & GENRE
TRACKER WAVE 8 2023
Beyoncé's Renaissance World Tour

Kickoff in Stockholm on May 10 drove global interest with the quickest streaming growth in S. America, Europe, and N. America.

Beyoncé Total On-Demand Streams by Region
Total OD Streams (Audio & Video) 5/7-9/23 vs 5/10-12/23

- N. America
- Europe
- LATAM
- Asia
- Australia & New Zealand
- South Africa

CHG GROWTH
- 34.7%
- 48.7%
- 65.8%
- 12.1%
- 24.5%
- 25.5%

Graph showing stream growth by region from 5/14/23 to 6/25/23.
LIVE

Cost of Tickets Is Now the #1 Concern Over COVID
Average Concert-Goer Spends +40% More on Concerts in May 2023 than September 2022

Average Monthly Expenditures on Concerts

<table>
<thead>
<tr>
<th></th>
<th>Jul 2021</th>
<th>Feb 2022</th>
<th>Sep 2022</th>
<th>Feb 2023</th>
<th>May 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
<td>$25</td>
<td>$26</td>
<td>$26</td>
<td>$33</td>
<td>$37</td>
</tr>
</tbody>
</table>

Barriers to Live Event Attendance
% who indicate this would keep them from attending a live in-person event

- High COVID case rates in my area
- Cost of ticket

SOURCE: LUMINATE INSIGHTS US MUSIC 360 THROUGH WAVE 2/S/2023
### Commercial Partnerships

**Music Fans Make Great Audiences for Brand Partnerships**

When compared to the General Population (Gen Pop) and other fan groups

<table>
<thead>
<tr>
<th>Activity</th>
<th>Pop Music Listeners</th>
<th>Sports Fans</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Shop Online</td>
<td>+49% more likely than Gen Pop</td>
<td>+27% more likely than Gen Pop</td>
</tr>
<tr>
<td>To Buy Cosmetics</td>
<td>+46% more likely than Gen Pop</td>
<td>+14% more likely than Gen Pop</td>
</tr>
<tr>
<td>To Use Food Delivery Services</td>
<td>+28% more likely than Gen Pop</td>
<td>+17% more likely than Gen Pop</td>
</tr>
</tbody>
</table>

*Source: Luminare Insights USD Entertainment, 2020 - Wave 5 (2021)*

Q4. Which of the following products or services, if any, have you purchased in the past 6 months?

**Base:** Total Respondents (2000), Pop Genre Music Listeners (1771), Sports Fans (1771)
TREND 2

Locals, Lyrics & Languages
U.S. Listeners Engaging with Foreign Content

69%
Of U.S. music listeners listen to music from artists originating from outside the U.S.

72%
Of Gen Z and Millennial music listeners listen to music from artists originating from outside the U.S.
40% of U.S. listeners listen to music in a non-English language.

Top Languages for U.S. Music Listening

- English: 93%
- Spanish: 26%
- French: 8%
- Japanese: 8%
- Korean: 7%
- Italian: 6%
- German: 5%
- Arabic: 3%
U.S. Listeners Engaging With Non-English Content
Streaming share of English language content in Top 10k US Total On-Demand (Audio & Video) tracks down 4.2% since 2021; Spanish grows 3.6%

Top 3 Languages in US H1 2023 Consumption*

1. English — 88.3%
2. Spanish — 7.9%
3. Korean — 0.9%

*STREAMING SHARE OF TOP 10K TOTAL ON-DEMAND (AUDIO & VIDEO) TRACKS
Top Languages Around the World
Share of English Language in Top 10K Tracks Declining

GLOBAL
- **United States**
  - English: FY 2022: 92.2%, YTD 2023: 88.3%
  - Spanish: FY 2022: 5.9%, YTD 2023: 7.9%
  - Korean: FY 2022: 0.7%, YTD 2023: 0.9%

- **Portugal**
  - English: FY 2022: 65.3%, YTD 2023: 51.6%
  - Portuguese: FY 2022: 34.4%, YTD 2023: 32.7%
  - Spanish: FY 2022: 4.2%, YTD 2023: 5.1%

- **Switzerland**
  - English: FY 2022: 64.8%, YTD 2023: 61.3%
  - German: FY 2022: 15.6%, YTD 2023: 14.4%
  - French: FY 2022: 8.0%, YTD 2023: 6.7%

- **Indonesia**
  - English: FY 2022: 43.9%, YTD 2023: 39.1%
  - Indonesian: FY 2022: 26.5%, YTD 2023: 25.7%
  - Korean: FY 2022: 7.4%, YTD 2023: 6.0%

- **Colombia**
  - Spanish: FY 2022: 69.4%, YTD 2023: 66.7%
  - English: FY 2022: 23.5%, YTD 2023: 21.3%
  - Korean: FY 2022: 1.3%, YTD 2023: 1.1%

- **South Africa**
  - English: FY 2022: 77.8%, YTD 2023: 73.0%
  - Zulu: FY 2022: 11.9%, YTD 2023: 11.9%
  - Afrikaans: FY 2022: 3.9%, YTD 2023: 2.8%

*Source: Luminate data based on total on-demand (audio + video) streaming in each country*
Streaming Growth Rate by Regions Outside of U.S. and Canada

Asia +107% in Total On-Demand (Audio + Video) Streams Over This Period Last Year

- Europe: 57% YOY Growth Rate
- LATAM: 70% YOY Growth Rate
- S. Africa Region: 83% YOY Growth Rate
- Asia: 107% YOY Growth Rate
- Australia & New Zealand: 55% YOY Growth Rate

SOURCE: LUMINATE COUNTRY-LEVEL DATA
Country Music Reaches New Streaming Peak

2.26B

Highest weekly total ever for Country U.S. On-Demand Audio streaming the week ending 6/1/23

Morgan Wallen’s *One Thing at a Time* accounts for 9.6% of all Country On-Demand Audio streaming since its 3/3/23 release
The New Country Consumer
Younger Fans Are Powering Country Artists To New Streaming Heights

<table>
<thead>
<tr>
<th>Artist</th>
<th>#1 Listening Format</th>
<th>Biggest Fan Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bailey Zimmerman</td>
<td>Music Streaming</td>
<td>Gen Z</td>
</tr>
<tr>
<td>Luke Combs</td>
<td>Music Streaming</td>
<td>Gen Z/ Millennial</td>
</tr>
<tr>
<td>Zach Bryan</td>
<td>Music Streaming</td>
<td>Gen Z</td>
</tr>
<tr>
<td>Morgan Wallen</td>
<td>Music Streaming</td>
<td>Millennial</td>
</tr>
<tr>
<td>Average Country Fan</td>
<td>AM/FM Radio</td>
<td>Boomers</td>
</tr>
</tbody>
</table>

Source: LUMINATE INSIGHTS ARTIST & GENRE TRACKER WAVE 8 6/23
U.S. Gen Z Country Music Fans

+32%
Gen Z Country Listeners are +32% more likely to discover new music through video and/or audio streaming services than the avg U.S. consumer and +11% more than other Gen Z music listeners.

+39%
Gen Z Country Listeners avg monthly spend on physical purchases (merch, music, gift cards) ($32) is +39% more than the avg U.S. music listener ($23).

+92%
Gen Z Country Listeners are +92% more likely to listen to playlists shared by family and friends than the avg U.S. consumer and +37% more likely than other Gen Z music listeners.

SOURCE: LUMINATE INSIGHTS ARTIST & GENRE TRACKER WAVE 8 6/2023
LUMINATE INSIGHTS US MUSIC 360 WAVE 7 6/2023
Country Music in Other Markets

Top 500 U.S. Country Songs
Total OD Streams in Ex-U.S. Country YTD Week Ending 6/29/23

- Canada: 2.3B
- Australia: 1.1B
- United Kingdom: 868.7M
- Philippines: 603.3M
- Indonesia: 499.3M
- India: 465.8M
- Brazil: 374.2M
- Mexico: 310.7M
- Germany: 244.8M

Index of Country Genre Streaming
Streaming of U.S. Top 500 Country Songs Through Week Ending 6/1/23

SOURCE: LUMINATE COUNTRY-LEVEL DATA
SNAPSHOT OF GENRES AROUND THE WORLD
Regional Mexican

Distribution of Listeners in the U.S. (Darker Colors Indicate Greater Listener Proportions)

17% non-Hispanic
13% non-Hispanic White
+34% more likely to be Millennials*

US On-Demand Audio (ODA) streaming YTD of Regional Mexican music (+50% over 2022)

<table>
<thead>
<tr>
<th>Artist</th>
<th>U.S. ODA STREAMS YTD</th>
<th>GLOBAL ODA STREAMS YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eslabon Armado</td>
<td>766.0M</td>
<td>1.6B</td>
</tr>
<tr>
<td>Junior H</td>
<td>391.8M</td>
<td>1.3B</td>
</tr>
<tr>
<td>Ivan Cornejo</td>
<td>384.9M</td>
<td>482.8M</td>
</tr>
</tbody>
</table>

*Compared to Gen Pop 13+
Source: Luminate Music Connect Luminate Insights: Artist & Genre Tracker Wave 8 6/2023
Afrobeats*

Distribution of Listeners in the U.S.
(Darker Colors Indicate Greater Listener Proportions)

+27% more likely to be Gen Z
+63% more likely to identify LGBTQ+**
62% non-Black

*PROFILE REFLECTIVE OF U.S. CONSUMERS IDENTIFYING AS AFROBEAT LISTENERS
**COMPARSED TO GEN POP 13+
LUMINATE INSIGHTS ARTIST & GENRE TRACKER WAVE 8/1/2023

US On-Demand Audio (ODA) streaming YTD of Afrobeats (+34% over 2022)

2.5B

<table>
<thead>
<tr>
<th>Artist</th>
<th>U.S. ODA STREAMS YTD</th>
<th>GLOBAL ODA STREAMS YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burna Boy</td>
<td>255.8M</td>
<td>1.1B</td>
</tr>
<tr>
<td>Tems</td>
<td>183.4M</td>
<td>303.3M</td>
</tr>
<tr>
<td>Wizkid</td>
<td>181.2M</td>
<td>532.9M</td>
</tr>
</tbody>
</table>

RANKED BY TOP AFROBEATS ARTISTS IN THE US BY ODA
J-Pop

Distribution of Listeners in the U.S.
(Darker Colors Indicate Greater Listener Proportions)

662.4M
US On-Demand Audio (ODA) streaming YTD of J-Pop artists ranked in US Top 10k artist list (+29.6% over 2022)

<table>
<thead>
<tr>
<th>U.S. ODA STREAMS YTD</th>
<th>GLOBAL ODA STREAMS YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yoasobi</td>
<td>69.2M</td>
</tr>
<tr>
<td>Fuji Kaze</td>
<td>61.9M</td>
</tr>
<tr>
<td>Ado</td>
<td>45.6M</td>
</tr>
</tbody>
</table>

RANKED BY TOP J-POP ARTISTS IN THE US BY ODA

* COMPARSED TO GEN POP 1.1
SOURCE: LUMINATE INSIGHTS ARTIST & GENRE TRACKER WAVE 7/3/2023 & WAVE 8/6/2023

+72% more likely to be Millennials
+88% more likely to identify LGBTQ+*
+12% more likely to be male (56% male)
TREND 3

The Impacts of New Tracks

Analyzing the Effects of the Ever-Growing Number of ISRCs on Streaming Platforms
93.4K Average new ISRCs added per day in 2022

112K Average of new ISRCs added daily to DSPs in the first half of 2023
New Audio and Video ISRCs Created Each Year

- 2018: 16.4M
- 2019: +57% to 25.9M
- 2020: -0.2% to 25.8M
- 2021: +18% to 30.5M
- 2022: +12% to 34.1M
- H1 2023: 20.2M

Average new ISRCs added per day through the first two quarters of 2023: 112K

LUMINATE GLOBAL ISRC INGESTION BEGINNING WEEK 40 2018
Average Daily ISRC Delivery to DSPs

Average of 112k new ISRCs delivered to DSPs each day through the first half of 2023

- Major Distribution
- Rest of Industry*

*inclusive of independent distribution and DSPs that cater to creator network

96.7%
AI Music Spread in Today’s Marketplace
How Ghostwriter “Heart On My Sleeve” Spread to 30+ Countries in April 2023

Countries with >30K Total OD Streams on a Single Day Throughout Period

- United States
- Canada
- United Kingdom
- Germany
- Australia
- Tot. Global

- “Heart on My Sleeve” jumped to 2.4K U.S. OD streams on Day 8 before being picked up by Canada, the UK, Australia and Germany.
- Growth in the US spurred pickup on day 9 in Canada, the UK, Australia and Germany.
- Day 11 showed a 105% Global OD stream jump.
- Luminate data shows activity in 32 countries mostly throughout the US / Canada, Europe, Latin America and Asia when it was pulled from DSPs.
### Top Albums
**Album sales + TEA + On-Demand SEA**

<table>
<thead>
<tr>
<th>Artist</th>
<th>Title</th>
<th>Total Album-Equivalent Consumption</th>
<th>Album Sales</th>
<th>Song Sales</th>
<th>On-Demand Audio Streams</th>
<th>On-Demand Video Streams</th>
</tr>
</thead>
<tbody>
<tr>
<td>Morgan Wallen</td>
<td>One Thing at a Time</td>
<td>3.312 million</td>
<td>242,000</td>
<td>456,000</td>
<td>3.857 billion</td>
<td>166.5 million</td>
</tr>
<tr>
<td>SZA</td>
<td>SOS</td>
<td>1.982 million</td>
<td>77,000</td>
<td>103,000</td>
<td>2.489 billion</td>
<td>124.6 million</td>
</tr>
<tr>
<td>Taylor Swift</td>
<td>Midnights</td>
<td>1.876 million</td>
<td>607,000</td>
<td>265,000</td>
<td>1.614 billion</td>
<td>51.1 million</td>
</tr>
<tr>
<td>Morgan Wallen</td>
<td>Dangerous: The Double Album</td>
<td>1.173 million</td>
<td>37,000</td>
<td>123,000</td>
<td>1.461 million</td>
<td>97.2 million</td>
</tr>
<tr>
<td>Metro Boomin</td>
<td>Heroes &amp; Villains</td>
<td>1.038 million</td>
<td>39,000</td>
<td>64,000</td>
<td>1.323 billion</td>
<td>39.7 million</td>
</tr>
<tr>
<td>Bad Bunny</td>
<td>Un Verano Sin Ti</td>
<td>0.967 million</td>
<td>21,000</td>
<td>41,000</td>
<td>1.240 billion</td>
<td>89.1 million</td>
</tr>
<tr>
<td>Drake, 21 Savage</td>
<td>Her Loss</td>
<td>0.898 million</td>
<td>16,000</td>
<td>32,000</td>
<td>1.158 billion</td>
<td>50.4 million</td>
</tr>
<tr>
<td>Zach Bryan</td>
<td>American Heartbreak</td>
<td>0.769 million</td>
<td>54,000</td>
<td>110,000</td>
<td>0.916 billion</td>
<td>33.3 million</td>
</tr>
<tr>
<td>Karol G</td>
<td>Manana Sera Bonito</td>
<td>0.716 million</td>
<td>19,000</td>
<td>48,000</td>
<td>0.867 billion</td>
<td>136.8 million</td>
</tr>
<tr>
<td>Taylor Swift</td>
<td>Lover</td>
<td>0.711 million</td>
<td>131,000</td>
<td>76,000</td>
<td>0.751 billion</td>
<td>20.3 million</td>
</tr>
</tbody>
</table>

### Top Albums
**Total Sales (Physical & Digital)**

<table>
<thead>
<tr>
<th>Artist</th>
<th>Title</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taylor Swift</td>
<td>Midnights</td>
<td>607,000</td>
</tr>
<tr>
<td>TOMORROW X TOGETHER</td>
<td>The Name Chapter: TEMPTATION</td>
<td>399,000</td>
</tr>
<tr>
<td>Stray Kids</td>
<td>S-Star</td>
<td>327,000</td>
</tr>
<tr>
<td>TWICE</td>
<td>Ready to Be</td>
<td>286,000</td>
</tr>
<tr>
<td>Morgan Wallen</td>
<td>One Thing at a Time</td>
<td>242,000</td>
</tr>
<tr>
<td>Seventeen</td>
<td>Seventeen 10th Mini Album &quot;FML.&quot;</td>
<td>236,000</td>
</tr>
<tr>
<td>Metallica</td>
<td>72 Seasons</td>
<td>215,000</td>
</tr>
<tr>
<td>Agust D (Suga of BTS)</td>
<td>D-Day</td>
<td>200,000</td>
</tr>
<tr>
<td>Jimin (BTS)</td>
<td>FACE</td>
<td>196,000</td>
</tr>
<tr>
<td>Melanie Martinez</td>
<td>PORTALS</td>
<td>194,000</td>
</tr>
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</table>
## Top Digital Song Consumption

**Song Sales + On-Demand SES**

<table>
<thead>
<tr>
<th>#</th>
<th>Artist</th>
<th>Title</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Morgan Wallen</td>
<td>“Last Night”</td>
<td>210,000</td>
</tr>
<tr>
<td>2</td>
<td>Miley Cyrus</td>
<td>“Flowers”</td>
<td>376,000</td>
</tr>
<tr>
<td>3</td>
<td>SZA</td>
<td>“Kill Bill”</td>
<td>50,000</td>
</tr>
<tr>
<td>4</td>
<td>PinkPanthers</td>
<td>“Boy’s A Liar, Pt. 2”</td>
<td>21,000</td>
</tr>
<tr>
<td>5</td>
<td>Rema &amp; Selena Gomez</td>
<td>“Calm Down”</td>
<td>106,000</td>
</tr>
<tr>
<td>6</td>
<td>The Weeknd</td>
<td>“Die For You”</td>
<td>40,000</td>
</tr>
<tr>
<td>7</td>
<td>Zach Bryan</td>
<td>“Something In The Orange”</td>
<td>63,000</td>
</tr>
<tr>
<td>8</td>
<td>Taylor Swift</td>
<td>“Anti-Hero”</td>
<td>95,000</td>
</tr>
<tr>
<td>9</td>
<td>Eslabon Armado</td>
<td>“Ella Baila Sola”</td>
<td>25,000</td>
</tr>
<tr>
<td>10</td>
<td>Metro Boomin, The Weeknd, 21 Savage</td>
<td>“Creepin”</td>
<td>37,000</td>
</tr>
</tbody>
</table>

## Top CD Album Sales

<table>
<thead>
<tr>
<th>#</th>
<th>Artist</th>
<th>Title</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TOMORROW X TOGETHER</td>
<td>The Name Chapter: TEMPTATION</td>
<td>395,000</td>
</tr>
<tr>
<td>2</td>
<td>Stray Kids</td>
<td>5-Star</td>
<td>322,000</td>
</tr>
<tr>
<td>3</td>
<td>TWICE</td>
<td>Ready to Be</td>
<td>258,000</td>
</tr>
<tr>
<td>4</td>
<td>Seventeen</td>
<td>Seventeen 10th Mini Album “FML”</td>
<td>233,000</td>
</tr>
<tr>
<td>5</td>
<td>Agust D (Suga of BTS)</td>
<td>D-Day</td>
<td>186,000</td>
</tr>
<tr>
<td>6</td>
<td>Taylor Swift</td>
<td>Midnights</td>
<td>176,000</td>
</tr>
<tr>
<td>7</td>
<td>Jmin (BTS)</td>
<td>FACE</td>
<td>168,000</td>
</tr>
<tr>
<td>8</td>
<td>Ateez</td>
<td>The World EP.2: Outlaw</td>
<td>129,000</td>
</tr>
<tr>
<td>9</td>
<td>ENHYPEN</td>
<td>Dark Blood</td>
<td>127,000</td>
</tr>
<tr>
<td>10</td>
<td>Stray Kids</td>
<td>Maxident</td>
<td>114,000</td>
</tr>
</tbody>
</table>

## Top Vinyl Album Sales

<table>
<thead>
<tr>
<th>#</th>
<th>Artist</th>
<th>Title</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Taylor Swift</td>
<td>Midnights</td>
<td>251,000</td>
</tr>
<tr>
<td>2</td>
<td>Lana Del Rey</td>
<td>Did You Know That There’s a Tunnel Under Ocean Blvd</td>
<td>132,000</td>
</tr>
<tr>
<td>3</td>
<td>Taylor Swift</td>
<td>folklore</td>
<td>107,000</td>
</tr>
<tr>
<td>4</td>
<td>Tyler, The Creator</td>
<td>IGOR</td>
<td>104,000</td>
</tr>
<tr>
<td>5</td>
<td>Fleetwood Mac</td>
<td>Rumours</td>
<td>103,000</td>
</tr>
<tr>
<td>6</td>
<td>boygenius</td>
<td>The Record</td>
<td>100,000</td>
</tr>
<tr>
<td>7</td>
<td>Melanie Martinez</td>
<td>PORTALS</td>
<td>93,000</td>
</tr>
<tr>
<td>8</td>
<td>Michael Jackson</td>
<td>Thriller</td>
<td>85,000</td>
</tr>
<tr>
<td>9</td>
<td>Pink Floyd</td>
<td>Dark Side of the Moon</td>
<td>85,000</td>
</tr>
<tr>
<td>10</td>
<td>Lana Del Rey</td>
<td>Born to Die</td>
<td>84,000</td>
</tr>
</tbody>
</table>
### Top Songs: On-Demand Streaming

#### Audio

<table>
<thead>
<tr>
<th>Artist</th>
<th>Song</th>
<th>Audio Streams</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Morgan Wallen</td>
<td>&quot;Last Night&quot;</td>
<td>588.7 million</td>
</tr>
<tr>
<td>2. SZA</td>
<td>&quot;Kill Bill&quot;</td>
<td>567.6 million</td>
</tr>
<tr>
<td>3. Miley Cyrus</td>
<td>&quot;Flowers&quot;</td>
<td>464.6 million</td>
</tr>
<tr>
<td>4. Pinkpantheress</td>
<td>&quot;Boy’s a Liar&quot;</td>
<td>370.4 million</td>
</tr>
<tr>
<td>5. The Weeknd</td>
<td>&quot;Die for You&quot;</td>
<td>349.8 million</td>
</tr>
<tr>
<td>6. Zach Bryan</td>
<td>&quot;Something in the Orange&quot;</td>
<td>331.2 million</td>
</tr>
<tr>
<td>7. Metro Boomin, The Weeknd &amp; 21 Savage</td>
<td>&quot;Creepin’&quot;</td>
<td>308.3 million</td>
</tr>
<tr>
<td>8. Estabon Armado</td>
<td>&quot;Ela Bala Sola&quot;</td>
<td>307.4 million</td>
</tr>
<tr>
<td>9. Morgan Wallen</td>
<td>&quot;You Proof&quot;</td>
<td>303.3 million</td>
</tr>
<tr>
<td>10. Taylor Swift</td>
<td>&quot;Anti-Hero&quot;</td>
<td>302.8 million</td>
</tr>
</tbody>
</table>

#### Video

<table>
<thead>
<tr>
<th>Artist</th>
<th>Song</th>
<th>Video Streams</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Lady Gaga</td>
<td>&quot;Bloody Mary&quot;</td>
<td>444.8 million</td>
</tr>
<tr>
<td>2. TWISTED</td>
<td>&quot;Worth Nothing&quot;</td>
<td>435.3 million</td>
</tr>
<tr>
<td>3. J. Cole feat. Amber Coffman</td>
<td>&quot;She Knows&quot;</td>
<td>410.5 million</td>
</tr>
<tr>
<td>4. Hans Zimmer</td>
<td>&quot;First Step&quot;</td>
<td>380.9 million</td>
</tr>
<tr>
<td>5. Miley Cyrus</td>
<td>&quot;Flowers&quot;</td>
<td>286.1 million</td>
</tr>
<tr>
<td>6. Lil Nas X &amp; Jack Harlow</td>
<td>&quot;Industry Baby&quot;</td>
<td>282.6 million</td>
</tr>
<tr>
<td>7. Fifty Fifty</td>
<td>&quot;Cupid&quot;</td>
<td>254.2 million</td>
</tr>
<tr>
<td>8. Crystal Castles</td>
<td>&quot;Transgender&quot;</td>
<td>244.5 million</td>
</tr>
<tr>
<td>9. AJR</td>
<td>&quot;World’s Smallest Violin&quot;</td>
<td>233.5 million</td>
</tr>
<tr>
<td>10. Cavendish Music</td>
<td>&quot;Funny Song&quot;</td>
<td>225.8 million</td>
</tr>
</tbody>
</table>

### Top Radio Songs

Based on Audience Impressions*

<table>
<thead>
<tr>
<th>Artist</th>
<th>Song</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Miley Cyrus</td>
<td>&quot;Flowers&quot;</td>
<td>2.409 billion</td>
</tr>
<tr>
<td>3. SZA</td>
<td>&quot;Kill Bill&quot;</td>
<td>1.909 billion</td>
</tr>
<tr>
<td>4. The Weeknd</td>
<td>&quot;Die for You&quot;</td>
<td>1.877 billion</td>
</tr>
<tr>
<td>5. Taylor Swift</td>
<td>&quot;Anti-Hero&quot;</td>
<td>1.730 billion</td>
</tr>
<tr>
<td>6. David Guetta &amp; Bebe Rexha</td>
<td>&quot;I’m Good (Blue)&quot;</td>
<td>1.691 billion</td>
</tr>
<tr>
<td>7. Rema &amp; Selena Gomez</td>
<td>&quot;Calm Down&quot;</td>
<td>1.580 billion</td>
</tr>
<tr>
<td>8. Harry Styles</td>
<td>&quot;As It Was&quot;</td>
<td>1.362 billion</td>
</tr>
<tr>
<td>9. Sam Smith &amp; Kim Petras</td>
<td>&quot;Unholy&quot;</td>
<td>1.276 billion</td>
</tr>
<tr>
<td>10. Chris Brown</td>
<td>&quot;Under the Influence&quot;</td>
<td>1.142 billion</td>
</tr>
</tbody>
</table>

### Top Songs: Programmed Audio Streams**

<table>
<thead>
<tr>
<th>Artist</th>
<th>Song</th>
<th>Programmed Audio Streams</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Morgan Wallen</td>
<td>&quot;Last Night&quot;</td>
<td>85.6 million</td>
</tr>
<tr>
<td>2. Miley Cyrus</td>
<td>&quot;Flowers&quot;</td>
<td>79.2 million</td>
</tr>
<tr>
<td>3. Bailey Zimmerman</td>
<td>&quot;Rock and a Hard Place&quot;</td>
<td>72.7 million</td>
</tr>
<tr>
<td>4. Morgan Wallen</td>
<td>&quot;Wasted On You&quot;</td>
<td>68.8 million</td>
</tr>
<tr>
<td>5. Morgan Wallen</td>
<td>&quot;You Proof&quot;</td>
<td>65.1 million</td>
</tr>
<tr>
<td>6. Chris Stapleton</td>
<td>&quot;Tennessee Whiskey&quot;</td>
<td>63.1 million</td>
</tr>
<tr>
<td>7. Chris Stapleton</td>
<td>&quot;You Should Probably Leave&quot;</td>
<td>57.9 million</td>
</tr>
<tr>
<td>8. Rema &amp; Selena Gomez</td>
<td>&quot;Calm Down&quot;</td>
<td>49.8 million</td>
</tr>
<tr>
<td>9. Morgan Wallen</td>
<td>&quot;Thought You Should Know&quot;</td>
<td>49.7 million</td>
</tr>
<tr>
<td>10. Luke Combs</td>
<td>&quot;Going, Going, Gone&quot;</td>
<td>49.5 million</td>
</tr>
</tbody>
</table>
## Share of Total Volume by Format and Genre

### Selected Top Genres

<table>
<thead>
<tr>
<th>Genre</th>
<th>Albums + SEA + On-Demand Streams</th>
<th>Total On-Demand Streams</th>
<th>On-Demand Audio Streams</th>
<th>On-Demand Video Streams</th>
<th>Total Album-Sales</th>
<th>Physical Album Sales</th>
<th>Digital Album Sales</th>
<th>Digital Song Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 R&amp;B / Hip-Hop</td>
<td>25.9%</td>
<td>27.3%</td>
<td>27.6%</td>
<td>25.4%</td>
<td>13.3%</td>
<td>14.1%</td>
<td>9.9%</td>
<td>15.6%</td>
</tr>
<tr>
<td>2 Rock</td>
<td>19.8%</td>
<td>16.5%</td>
<td>17.1%</td>
<td>12.5%</td>
<td>44.2%</td>
<td>46.6%</td>
<td>33.5%</td>
<td>23.2%</td>
</tr>
<tr>
<td>3 Pop</td>
<td>12.3%</td>
<td>12.8%</td>
<td>12.0%</td>
<td>17.9%</td>
<td>10.7%</td>
<td>10.8%</td>
<td>9.9%</td>
<td>17.4%</td>
</tr>
<tr>
<td>4 Country</td>
<td>8.4%</td>
<td>7.9%</td>
<td>8.5%</td>
<td>3.7%</td>
<td>7.0%</td>
<td>6.2%</td>
<td>10.4%</td>
<td>12.5%</td>
</tr>
<tr>
<td>5 Latin</td>
<td>6.7%</td>
<td>8.1%</td>
<td>7.9%</td>
<td>14.0%</td>
<td>0.6%</td>
<td>0.4%</td>
<td>1.1%</td>
<td>3.0%</td>
</tr>
<tr>
<td>6 Dance / Electronic</td>
<td>3.5%</td>
<td>3.7%</td>
<td>3.4%</td>
<td>5.5%</td>
<td>1.9%</td>
<td>1.8%</td>
<td>2.2%</td>
<td>5.4%</td>
</tr>
<tr>
<td>7 World Music</td>
<td>2.8%</td>
<td>2.5%</td>
<td>2.2%</td>
<td>4.1%</td>
<td>7.3%</td>
<td>8.4%</td>
<td>2.4%</td>
<td>2.9%</td>
</tr>
<tr>
<td>8 Christian / Gospel</td>
<td>1.8%</td>
<td>1.7%</td>
<td>1.6%</td>
<td>1.5%</td>
<td>1.7%</td>
<td>1.3%</td>
<td>3.1%</td>
<td>3.6%</td>
</tr>
<tr>
<td>9 Children</td>
<td>1.2%</td>
<td>1.1%</td>
<td>1.1%</td>
<td>1.1%</td>
<td>0.8%</td>
<td>0.7%</td>
<td>1.4%</td>
<td>0.7%</td>
</tr>
<tr>
<td>10 Jazz</td>
<td>1.0%</td>
<td>0.7%</td>
<td>0.7%</td>
<td>0.4%</td>
<td>3.0%</td>
<td>3.0%</td>
<td>2.6%</td>
<td>1.2%</td>
</tr>
<tr>
<td>11 Classical</td>
<td>1.0%</td>
<td>0.8%</td>
<td>0.9%</td>
<td>0.1%</td>
<td>1.4%</td>
<td>1.1%</td>
<td>2.7%</td>
<td>0.8%</td>
</tr>
</tbody>
</table>

### Share of Total Album-Equivalent Consumption by Format

- **On-Demand Video Streams (SEA)**
- **On-Demand Audio Streams (SEA)**
- **Digital Track Sales (TEA)**
- **Digital Albums**
- **Physical Albums**
Luminate is the preeminent entertainment data and insights company, unleashing access to the most essential, objective, and trustworthy information across music, film and television, with data compiled from hundreds of verified sources. Today, the company maintains its more than 30-year legacy of accurate storytelling by powering the iconic Billboard music charts, while also acting as the premiere database for the television and film industries. Working closely with record labels, artists, studios, production companies, networks, tech companies, and more, Luminate offers the most valued source of comprehensive, independent, and foundational entertainment data that drives industry forward. Luminate is an independently operated company and a subsidiary of PME TopCo, a joint venture between Penske Media Corporation and Eldridge.