

Electronic Beats, Economic Treats

The benefits of electronic music to the UK

How electronic music keeps the UK economy thriving.

The second UK electronic music industry report.

The economic, community and cultural value of the electronic music industry in the UK.

8th February 2024



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Overview

This report was commissioned by the NTIA to fully understand the economic contribution and the cultural significance of the electronic music industry to the UK economy. It was led by [David Boyle](#) of [Audience Strategies](#), an agency that uses data to help artists and brands understand their audiences and the trends they're driving.

We measured everything we could and came up with a total for the electronic music industry's measurable impact. But there is so much more that we can't measure now. SO MUCH MORE. We describe this and bring it to life with academic studies and a wealth of personal experiences from industry professionals and artists.

Goals for this Report

The purpose of this report is to delve into the economic and cultural footprint of the UK's electronic music industry, assessing its influence on both the national economy and cultural landscape. This second edition of the report not only updates our findings but also tracks changes within the industry, underscoring our commitment to providing robust data, economic analysis, and insights into the perspectives of both the industry and its audience.

Our primary aim is to highlight the electronic music industry's value, underline its importance, and pinpoint both the challenges it faces and the opportunities it offers. We seek to establish funding mechanisms for artists and DJs and bolster support for grassroots venues and promoters. Equally critical is our objective to enhance educational initiatives to address the industry's talent pipeline gaps, ensuring its sustainability.

We will present a comprehensive overview of the electronic music scene, from the energy of the dance floor to the creativity within recording studios, celebrating the diverse talent propelling the industry. Our exploration will cover the sector's economic contributions, including recorded music, music publishing, and the vibrant live scene encompassing concerts, events, and festivals. The report will also focus on the unique role of electronic music nightclubs in cultivating community, inclusivity, and tolerance.

Further, we will discuss the pivotal role of education in securing the industry's future and examine the effects of gentrification, licensing, and zoning on the sector. Our intention is to motivate both the government and industry stakeholders to foster the growth and success of electronic music, emphasising the need for a stronger foundation in education, innovation, and community engagement.

Ultimately, our goal is to elevate electronic music, illuminating its significant impact on the UK's economy and cultural fabric, and to catalyse support for its ongoing development and prosperity.

One-page summary

This year's report on the UK's electronic music industry shows cultural vibrancy, economic significance, and evolving trends within the sector. Electronic music continues to electrify the UK's cultural and economic landscape, albeit with nuanced shifts in its trajectory over the last year.

Electronic music's cultural footprint has expanded, evidenced by its 10.6% share of UK singles revenue in 2022, up from 10.0% in the previous year, and a 15.5% presence in the weekly Top 10 on the Official Singles Chart in 2023. This genre's popularity is further underscored by its ranking as the second most streamed on digital platforms in the UK, including YouTube and Spotify, where London boasts the second highest number of electronic music monthly listeners on Spotify globally.

The festival scene has become a prominent showcase for electronic music's dominance, with 30% of artists at UK festivals representing the genre, leading over rock and pop. The UK's electronic music festival landscape in 2023 highlighted a preference for smaller, more intimate gatherings, with 94% of electronic music festivals accommodating under 30,000 attendees. We estimate a significant surge in festival attendance in 2023, with 2.7 million attendees in 2023, up 7% from 2.5 million the previous year.

However, the industry faces challenges, marked by a 6% decrease in its total measurable economic impact, now calculated to be £2.5 billion. Since the start of the pandemic, 396 nightclubs, or 32%, have been lost. In the last year alone, we lost 31 nightclubs (4%), and nightclub visits for electronic music saw a 9% decrease, reflecting broader trends affecting nightlife and social spaces.

Despite these hurdles, the report reveals a resilient and vibrant community, with 97 million nights out enjoyed based on electronic music over the last 12 months. The global influence of UK electronic music remains strong, with British artists like Calvin Harris leading in global electronic music radio spins. US artists account for 16% of the digital demand for electronic music in the US.

The engagement with electronic music extends beyond mere listening, profoundly impacting social connections, community building, and individual well-being. Electronic Pulse. Our survey of Dance Music's Engagement, Culture, and Connections underscores the genre's role as a vital catalyst for inclusivity and mental health benefits, with 80% of respondents experiencing emotional and mental health improvements through dance and electronic music events. These gatherings are not just entertainment venues but community hubs, where 75% of attendees feel a sense of belonging, underscoring the genre's ability to foster strong social bonds. Our survey highlights the intrinsic value of electronic music in promoting wellbeing and enhancing community cohesion, contributing to the sector's cultural significance and economic resilience.

Electronic music's audience portrays a youthful and engaged demographic, with 80% of followers on social media under 35 years old. The genre's events are celebrated for promoting diversity, inclusivity, and serving as hubs for creativity and community building. Notably, 98% of clubbers feel safe in club environments, indicating the significance of these spaces beyond mere entertainment.

In conclusion, while facing economic contractions and challenges in maintaining physical spaces for music, the UK's electronic music scene continues to thrive culturally, fostering a strong sense of community and innovation. The report underscores the need for supportive measures to sustain the industry's growth and address its challenges, ensuring electronic music remains a vital and flourishing component of the UK's cultural and economic landscape.

One page of key facts¹

Electronic music's cultural impact

- **2nd:** Electronic music's rank amongst genres in the UK on digital music services, including YouTube and Shazam.
- **169.2 million** UK Spotify monthly listeners for electronic music artists combined, which ranks fourth globally.
- **2nd:** London's global rank in Spotify monthly listeners for electronic music artists combined 82.6 million.
- **30%** of artists at UK festivals are electronic artists, leading other genres! (Next is Rock at 22% and pop at 21%).
- **143** UK festivals in 2023 were primarily focused on electronic music.
- **3rd** in the world for the festivals containing electronic music. The UK hosts 300, featuring around 19,500 artists.
- **97m** nights out were based on electronic music in the UK over the last 12 months, 8% down on the previous year.
- **80%:** the percentage of UK followers of electronic music accounts on Twitter and Instagram who are under 35.

Electronic music's impact around the world

- **1.8 million** radio spins globally for Calvin Harris, highlighting the UK's strength in the genre.
- **73%** of the top 30 global artists are significantly influenced by electronic music.
- **16%:** The share of digital demand in the US for the top 200 electronic music artists that is for UK artists.

Electronic Pulse. Our survey of Dance Music's Engagement, Culture, and Connections **NEW THIS YEAR**

- **80%** of UK electronic music fans listen to the genre daily, including 75% of those aged 45 and over.
- **43%** of fans aged 16-34 go clubbing weekly (vs. 24% of fans overall.)
- **80%** experience emotional and mental health benefits at electronic music events.
- **79%** of women and 87% of men believe the electronic music scene promotes diversity and inclusivity.
- **70%** of respondents view dance / electronic events as centres of creativity and innovation.
- **63%** highlight the importance of these events as safe spaces for marginalised groups.
- **52%** believe these events drive trends in art and fashion.
- **50%** see dance/electronic music events as essential to local community building.
- **98%** of clubbers feel safe in clubbing environments.

Electronic music's economic impact - our valuation

- **£2.5 billion** is the total measurable impact of electronic music on the UK, across recorded music, nightclubs, festivals, and concerts, experiencing a 6% decrease from the previous year. Driven by:
- **-4%:** The number of GB nightclubs decreased 4% from 882 in 2022 to 875 in 2023. A net loss of 31.
- **90.0m** visits were made to nightclubs for electronic music, indicating a 9% decline.
- **£1,457.3m** was contributed by nightclubs to the economy, a 14% decrease.
- **£210.6m** was generated from recorded music, an increase of 16%.
- **£567.8m** was the economic contribution from festivals, up 9%.
- **£285.5m** came from other live electronic music events, reflecting a 5% increase.

¹ Source: Audience Strategies analysis. Based on the latest data available from each source. Usually, 2023, but occasionally 2022 when that's the most recent year available. Check each section of the report for precise data and the exact time periods used. Note: In this report, we have occasionally revised figures given in last year's report, where updated data allowed for more accurate estimates.

Scope and definitions

Defining terms and concepts are essential in any report, as different people may have different understandings and interpretations of certain terms. In the context of this report, it is important to establish clear definitions for terms such as "electronic music," "electronic music industry," and "nightclub." These definitions serve as the foundation for our analysis and understanding of the electronic music industry and help to ensure that the data and insights presented in this report are grounded in a shared understanding of these key terms. By providing these definitions, we aim to provide a clear and consistent framework for our analysis and to ensure that all stakeholders have a common understanding of the terms and concepts discussed in this report.

- **Electronic music:** A broad term that refers to music that is created using electronic devices and techniques, such as synthesisers, drum machines, and digital audio workstations. Electronic music can include a wide range of genres, such as techno, house, trance, and many others.
- **Electronic music industry:** We're considering electronic music across all personal listening, live performances and DJ nights. Live music refers to musical performances where electronic music is performed in real time in front of a live audience. DJ nights refer to electronic music played and mixed by a DJ in a live setting, typically in a nightclub or at a festival. Personal listening, on the other hand, refers to listening to music in a private and individual setting, such as through headphones or at home.
- **Nightclub:** A venue that is open late at night and typically serves alcohol, with the primary purpose of hosting electronic music artists and DJs. Nightclubs can feature a variety of music genres, but we're focusing on electronic music in this report.

Contributors

This report was written by [David Boyle](#), [Rufy Ghazi](#) and [Simon Jacobs](#) of [Audience Strategies](#), an agency that uses data to help artists and brands understand their audiences and trends. But it drew on contributions from a much wider group.

The contributors to this report represent a diverse and comprehensive cross-section of individuals and organisations within the music and entertainment industry. From data and analysis experts at NielsenIQ and Viberate to experienced industry professionals from LIVE, the BPI, and REKOM UK to international DJs and producers, festival directors, night-time economy advisors, and more, this list includes a wide range of perspectives, experiences, and insights. With contributions from experts in recorded music stats, festival data, and editorial analysis, as well as first-hand perspectives from festival directors, night-time economy advisors, and influential DJs, this report provides a well-rounded view of the music and entertainment industry.

First and foremost: Thanks to Mike Kill, CEO at NTIA for his leadership and guidance

Thanks for data and analysis from:

- Nik Xypolitos and Reuben Pullan at CGA by NIQ
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Thanks for interviews, insights, case studies and perspectives from:

- Amy Van-Baaren, Head of Community, Resident Advisor
- Andy Blackett, Head of Promotions, Fabric London;
- Archie Clark, prompter at Groovin'
- Ashley Howard, Relationship Manager for Dance Music, PRS for Music
- Ben Rapp, Regional Manager, Lancashire Music Service & Lancashire County Council
- Billy Mauseth, Director, Brighton Music Conference
- Brandon Block, Motivational Thought Coach at Happy Days For Everyone and DJ
- Carl Loben, Editor-in-Chief, DJ Mag
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- Charlie Toller, Prism Sport + Entertainment
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- James Slater, Venues & Operations Manager, Nottingham Trent Students' Union & The Level
- Judy Griffith, Programming Director, Fabric London
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- Maria May, Head of Electronic Music, CAA

- Miles Shackleton, COO Toolroom and Co-founder Toolroom Academy
- Nick Morgan, CEO, We Group UK
- Patrick Somers, DHP Family
- Pete Jordan, Director / Founder of Weird Science & MADE Festival
- Peter Marks, Chairman, REKOM UK
- Provhat Rahman, Founder, Daytimers and Co-founder, Dialled In
- Rob Searle, Head of Entertainment & Music, REKOM UK
- Rosie Hall, CEO, The Rogue Room
- Sacha Lord, Night Time Economy Adviser for Manchester and co-creator of the Parklife festival and The Warehouse Project
- Samantha Nelson, Founder, Hub16 Studios
- Samantha Parsley, Professor at University of Portsmouth and Founder 'In the Key'
- Steven Braines, Co-founder, He.She.They and The Weird and the Wonderful
- Stuart Glen, Co-founder and MD, The Cause
- Sunil Sharpe, DJ and Artist
- Tom Kiehl, Interim CEO, at UK Music
- Tony Rigg, Music Industry Advisor, Practitioner, Consultant, Educator and Researcher with the University of Central Lancashire
- Wez Saunders, CEO & Co-Owner, Defected Records
- Yousef, DJ, Producer and Promoter

If you'd like to contribute to next year's report in any way, please get in touch with david@audiencestrategies.com

Forewords

Michael Kill, CEO of NTIA

In the ever-evolving landscape of music, electronic music stands out not only as a genre but as a dynamic cultural force that has woven itself into the very fabric of society. This report delves into the thriving electronic music scene in the United Kingdom, a journey through beats and rhythms that transcend boundaries, genres, and even adversities.

The resilience of the UK electronic music scene is a testament to the unwavering spirit of its creators, enthusiasts, and the tight-knit community that has grown around it. Despite facing numerous challenges, the scene has not just endured; it has flourished. In the face of adversity, the electronic music community in the UK has emerged stronger, more vibrant, and more connected than ever before.



As we explore the pages of this report, we will witness the remarkable growth in stature and talent within the UK electronic music scene. From underground clubs to mainstream festivals, from niche sub-genres to chart-topping hits, the scene has expanded in ways that were once unimaginable. The artists, producers, and visionaries have not only embraced change but have become pioneers, pushing the boundaries of creativity and sonic exploration.

What truly sets the UK electronic music scene apart is its sense of community. Beyond the pulsating beats and infectious melodies lies a collective spirit that unites individuals from diverse backgrounds. This community transcends borders, bringing together people who share a passion for the transformative power of electronic music. It is a space where differences are celebrated, and the universal language of beats and rhythms creates a sense of belonging that knows no bounds.

In the face of societal challenges, economic shifts, and the global landscape, the UK electronic music scene has become a cultural beacon, illuminating the way forward. It serves as a reminder that even in the darkest moments, music has the power to inspire, unite, and uplift. The resilience of the electronic music community in the UK mirrors the strength of the human spirit and the ability of art to endure and thrive.

This report invites you to embark on a journey through the pulsating heart of the UK electronic music scene. From the pioneers who laid the groundwork to the emerging talents shaping its future, each note, each beat, is a testament to the enduring cultural value of electronic music in the United Kingdom. As we navigate the vibrant landscape of sound and culture, let us celebrate the resilience, talent, and sense of community that define this extraordinary musical movement.

Yousef, DJ, Producer and Promoter

Electronic music has profoundly shaped communities and creative minds across the UK, making an immense impact on my own life. It is a genre that has given me so much personally, and I am thrilled to have been able to help with this report to showcase its true value.

The UK has been at the forefront of electronic music, with iconic clubs and festivals becoming catalysts for a musical revolution. These spaces have fostered inclusivity, bringing together individuals from diverse backgrounds who share a deep passion for the music.

Beyond its cultural significance, electronic music has been a source of inspiration for countless artists, producers, and DJs. Its ever-evolving nature has blurred boundaries and allowed for limitless experimentation, resulting in groundbreaking sonic experiences.

Personally, electronic music has been a transformative force. It has provided a sense of community, a creative outlet, and a platform to connect with others. The UK's electronic music scene has nurtured artistic growth and facilitated invaluable collaborations.

This report really aims to highlight the profound impact of electronic music on communities, individuals, and the wider cultural landscape. It is a testament to the unwavering dedication, creativity, and passion of those involved in shaping this vibrant and dynamic industry.

I am grateful for the opportunity to dive into the experiences, stories, and challenges faced by the electronic music community. By showcasing its true value, we can celebrate its achievements and ensure its continued growth and prosperity for years to come.

Yousef, DJ, producer and promoter. Best known for his work in the underground dance music scene and has been active in the industry for over two decades. He has released music on various labels and performed at numerous clubs and festivals around the world. Yousef is also the founder of Circus, a UK-based club night and record label.



Wez Saunders, CEO & Co-Owner, Defected Records

Electronic music holds significant importance in the UK, serving as a cultural, economic, and social pillar. It has been instrumental in shaping the UK's nightlife and music scene, contributing significantly to the economy through festivals, clubs, and music sales. Electronic music has fostered community and identity among fans, promoting inclusivity and innovation. Its global appeal has also enhanced the UK's international reputation as a leader in music production and live events, making it a key player in the worldwide music industry.



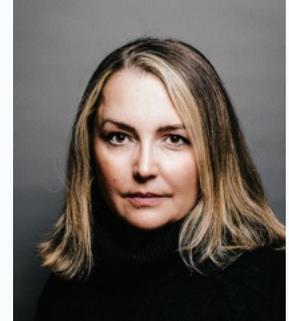
This comprehensive report, spearheaded by Michael Kill and the NTIA and crafted by David Boyle of Audience Strategies, delves into the significant economic and cultural footprint of the UK's electronic music industry. It assesses the genre's impact on the national economy, community well-being, and cultural landscape, exploring its popularity from grassroots venues to global stages. The document identifies challenges, proposing strategies for sector support, providing further understanding of the sector to the Government aiming to illuminate the industry's value, advocate for educational and infrastructural development, and foster a more inclusive and supported electronic music community.

Wez Saunders is the CEO and co-owner of one of the World's leading independent music companies, Defected Records. With over 400 releases a year across 26 sub-labels and more than 400 events worldwide under its three flagship touring brands—Defected, Glitterbox, and D4 D4NCE—Defected stands as a titan in the music industry. The company's comprehensive approach extends to music publishing and agency services, supported by a dedicated staff of 90, underscoring its pivotal role in shaping the global music landscape.

Maria May, Head of Electronic Music, CAA

As the Head of Electronic Music at CAA, I am happy to endorse and support the Electronic Music Report by the Night Time Industries Association. This report holds immense importance for the electronic music industry in the UK.

Electronic music continues to be a driving force globally, and the UK has played a pivotal role in its development. The report explores the economic and cultural impact of electronic music, highlighting its contributions to job creation, tourism, and community well-being.



It also sheds light on the challenges faced by the industry, providing insights for future growth. As we continue to champion electronic music's potential, this report serves as a powerful tool for collaboration, innovation, and advocacy. In order to continue to grow we need to support each other and the culture of dance music. Together, let us propel electronic music to new heights in the UK and beyond.

Maria May, Head of Electronic Music/Senior Agent CAA

Carly Heath, Night Time Economy Advisor for Bristol

Dancing as a community is a joyful human tradition, as old as time. Anyone who regularly seeks the skin-tingling sensation of dancing in front of a sound system will understand the value of electronic music to their lives. Nothing matches those moments of bodies in motion, palms and arms in the air, repetitive beats moving dancing feet.

Clubs are much more than simply sites of alcohol consumption. Dance spaces are community places. They are a unique feature as 'beacons of joy' on our high streets. Clubs are a unifying public place to explore identity, connect through culture, and reset bodies and minds at the end of a stressful week.

The abundant creativity imbued in British club spaces influences music scenes around the world. Britain's clubs, DJs, promoters, festivals, radio stations and record labels are unsung heroes of British music - and the A&R department of the electronic music industry.

Importantly, electronic music fans are active participants in the creation of underground culture. The connection between DJ's and the dancefloor is reciprocal. I feel there is magic created in the call-and-response moments wrapped around a perfectly placed rewind. For me, dance spaces are all about the people - without the ravers, there'd be no rave.

Dance spaces deserve celebration for their significant contribution to British Culture, yet the financial support and public funding for our culture is woefully inadequate. I'm hopeful that future generations will recognise club culture as a British cultural institution. The government should better support the scenes of today to create the legendary artists of the future.

The unending fight for our right to party is a battle cry for our night time economy.

Carly Heath is the Night Time Economy Advisor for Bristol



Sacha Lord, Night Time Economy Adviser for Greater Manchester

As an ardent advocate for the electronic music genre, I am compelled to delve into the profound impact it has had on the cultural landscape of the United Kingdom. Electronic music is not merely a collection of beats and melodies; it is an immersive journey that transcends boundaries, weaving itself into the fabric of our society and leaving an indelible mark on the lives of countless individuals.

The pulsating heart of electronic music resonates through the vibrant music scene in the UK, contributing immeasurably to its rich cultural tapestry. It is a genre that has evolved and adapted, mirroring the dynamic nature of our society. From the gritty streets of Manchester to the pulsating energy of London, electronic music has found a home in the hearts of music enthusiasts, forging connections and fostering a sense of unity.

The success of iconic events such as Warehouse Project and Parklife festival is a testament to the genre's enduring appeal and cultural significance. These festivals have become not just annual gatherings but veritable celebrations of the electronic music movement. The rhythmic beats and innovative soundscapes showcased at these events resonate with attendees, creating an atmosphere that is both electrifying and communal.

Warehouse Project, with its industrial allure and commitment to pushing the boundaries of electronic music, stands as a beacon of innovation. It has become a mecca for electronic music enthusiasts, attracting artists from around the globe and providing a platform for emerging talents to showcase their prowess. The festival's ability to curate a diverse lineup mirrors the genre's inclusivity, welcoming a multitude of sub-genres and ensuring that there is something for everyone.

Parklife festival, on the other hand, transforms Manchester's Heaton Park into a vibrant kaleidoscope of sound, colour, and energy. The festival's commitment to electronic music is evident in its lineup, featuring some of the most influential artists in the genre. Parklife not only entertains but educates, exposing audiences to the breadth and depth of electronic music and its ever-evolving sonic landscape.

Electronic music has the unique power to transcend cultural, social, and generational boundaries. It serves as a unifying force, bringing together people from diverse backgrounds under the banner of sonic exploration. Beyond the beats and melodies, it fosters a sense of belonging and community, creating memories that last a lifetime.

In conclusion, electronic music is not just a genre; it is a cultural phenomenon that has woven itself into the very fabric of the UK's music scene. Warehouse Project and Parklife festival, as torchbearers of this sonic revolution, exemplify the genre's ability to captivate, inspire, and unite. As we celebrate the undeniable success of these events, let us also recognise the enduring value of electronic music in shaping the collective narrative of our society.

Sacha Lord is the Night Time Economy Adviser for Greater Manchester and the co-creator of the Parklife festival and The Warehouse Project.



Jeff Smith MP, Labour MP for Manchester Withington

As a long-time DJ turned politician, I'm very mindful of the profound impact electronic music has on our economy, communities, and culture. Music has power not just as entertainment, but as a catalyst for change and community building.

Any discussion about the importance of electronic music must include its immense contribution to the UK economy. The industry generates billions of pounds annually, creating jobs and supporting countless professionals, from musicians and DJs to promoters and technicians. This bustling ecosystem fuels innovation, attracts investment, and propels the UK forward as a global leader in the electronic music scene.



But the significance of electronic music goes far beyond its economic impact. It has the remarkable ability to bridge gaps and unite communities.

Nightclubs and music venues serve as gathering places for people from diverse backgrounds, offering opportunities for social interaction, self-expression, and collective celebration. The pulsating beats and innovative sounds of electronic music transcend language and cultural boundaries, serving as a universal language that resonates with people from all over the world, speaking to our shared human experience and fostering a powerfully inclusive environment where people can come together, forge connections, and build lasting relationships.

My experiences as a DJ have informed my perspectives as a Parliamentarian and deepened my commitment to supporting and championing the arts. By recognising and nurturing the role that electronic music plays in our society, we can cultivate a more vibrant and inclusive cultural landscape that reflects the richness and diversity of the UK.

I remain dedicated to recognising and supporting the transformative power of music. Let's celebrate electronic music not only for its contributions to our economy and our society, but for bringing us so much joy.

Jeff Smith MP is the Co-Chair of the Night Time Economy All Party Parliamentary Group

0. Three-page summary

1. The importance of electronic music to the UK economy

1.1. Recorded electronic music and music publishing

The UK's electronic music scene is not just thriving; it's influencing the global landscape with a powerful economic and cultural impact. Leading this charge are artists like Calvin Harris, whose airplay stats underscore the UK's dominance in electronic music. The genre's share of UK singles revenue has seen a significant increase, reflecting its growing popularity. Moreover, the report highlights the UK's role in creating new global music genres, from house to grime, showcasing an innovative spirit that has a broad appeal. With an economic valuation of £131.8m from recorded music and music publishing, the direct impact is clear. Yet, it's the genre's indirect influence on other music styles and its substantial export value that truly underscore the global reach and economic significance of the UK's electronic music scene. This summary encapsulates the essence of the electronic music industry's contribution to the UK, from economic benefits to cultural vibrancy, setting a global benchmark for innovation and success in the industry.

1.2. Live electronic music: concerts, events and festivals

The live electronic music scene, encompassing concerts, events, and festivals, has emerged as a formidable force in the UK, contributing significantly to its cultural and economic vitality. In 2023, the UK solidified its position as a global leader in the electronic music festival market, hosting 294 festivals featuring electronic artists and drawing an impressive attendance of 2.7 million, a 7% increase from the previous year. These festivals alone injected £567.8 million into the economy, marking a 9% growth. Moreover, the broader landscape of live electronic music events, including concerts, further enriched the UK's economy with an additional £285.5 million. This financial injection is indicative of the genre's widespread appeal and its capacity to generate substantial economic activity, from festival ticket sales to concert entry fees and associated consumer spending on food, transport, and more. The live electronic music sector not only showcases the UK's leading role on the global stage but also highlights the genre's deep-rooted impact on fostering community, innovation, and cultural expression.

1.3. Electronic music nightclubs

This chapter highlights the profound challenges faced by the UK's electronic music nightclubs amid economic and cultural shifts, underscored by a 14% decrease in overall spending to £1,457.3 million in 2023 from £1,699.0 million the previous year. Nightclubs experienced a notable decline in patronage and spending, influenced by the rising cost of living, resulting in a 4% reduction in the number of GB nightclubs from 882 in 2022 to 851 in 2023. Despite these adversities, nightclubs remain vital to the UK's cultural and economic landscape, urging strategic support to address issues such as reduced midweek business, declining footfall, and financial pressures on venue operations. This comprehensive assessment underscores the need for targeted interventions to revitalise the nightclub industry and sustain its contribution to the UK's night-time economy.

1.4. Adding it up: The total economic impact of electronic music in the UK

The electronic music scene in the UK has demonstrated a robust cultural and economic presence, with a detailed analysis revealing an annual contribution of £2.5 billion across recorded music, nightclubs, festivals, and concerts. Despite a slight downturn, evidenced by an 8% decrease in electronic music nights out, totalling 97 million in the last year, the sector continues to flourish in certain areas. Notably, recorded music saw a 16% revenue increase, and festivals experienced a 9% rise in economic contributions, showcasing the genre's enduring appeal and resilience. The report underscores the substantial role electronic music plays in the UK's economy, highlighting both the challenges and the vibrant opportunities within this dynamic industry.

2. Electronic music education

The transformative impact of electronic music education in the UK is underscored by innovative initiatives and the passionate involvement of industry professionals. Highlighting the significance of electronic music in both culture and education, this report section showcases pioneering examples like the Lisa Lashes School of Music and its collaboration with Northamptonshire police, as well as specialised courses offered by Toolroom Academy. Challenges such as funding, technological reluctance, and equipment needs are acknowledged, alongside the potential of music venues to serve as educational spaces. The distinction between formal education and specialised, industry-relevant courses is explored, revealing a trend towards more focused learning paths. The economic and cultural contributions of these educational efforts are evident, from fostering community and inclusivity to supporting the professional development of aspiring artists. This section paints a picture of a vibrant, evolving sector poised to shape the future of the UK's electronic music scene.

3. Electronic Music Audiences **NEW THIS YEAR**

For this year's report, we're deep-diving into the audiences that make up the electronic music scene.

3.1. What we heard from the industry **NEW THIS YEAR**

Electronic music in the UK is a vibrant and evolving landscape, marked by its appeal across different age groups and its significant role in cities like London, Manchester, Bristol, and Glasgow. The industry is witnessing a positive shift towards gender diversity and inclusion, with efforts to support women, non-binary, and LGBTQ+ artists. The genre's ability to attract fans from varied socioeconomic backgrounds and its adaptation to changing consumer behaviours highlight its cultural significance and economic impact. With trends indicating a move towards premium experiences and the challenges nightclubs face due to decreased bar sales, the electronic music scene is at a crossroads. Innovations like 16+ nights and events targeting the over-40 demographic suggest a responsive and resilient industry, keen on engaging a broader audience while navigating the financial implications of evolving consumer preferences.

3.2. Electronic Pulse. Our survey of Dance Music's Engagement, Culture, and Connections **NEW THIS YEAR**

Our survey shows that engagement with electronic music extends beyond mere listening, profoundly impacting social connections, community building, and individual wellbeing. Our survey underscores the genre's role as a vital catalyst for inclusivity and mental health benefits, with 80% of respondents experiencing emotional and mental health improvements through dance and electronic music events. These gatherings are not just entertainment venues but community hubs, where 75% of attendees feel a sense of belonging, underscoring the genre's ability to foster strong social bonds. Furthermore, the festivals and live events are particularly notable for their appeal across demographics, with 65% of fans aged 45 and over, and 84% of female fans attending electronic music festivals in the past year, reflecting the genre's broad and inclusive appeal. These statistics highlight the intrinsic value of electronic music in promoting wellbeing and enhancing community cohesion, contributing to the sector's cultural significance and economic resilience.

3.3. Measuring the digital demand for electronic music **NEW THIS YEAR**

The UK's electronic music scene commands a vibrant digital presence, with a combined 21.8 million followers on Instagram and X (formerly Twitter) for the top 200 electronic musicians, and a staggering 18.9 million Google searches in 2023 alone. Notably, Calvin Harris emerges as a leading figure with 2.7 million Twitter followers in the UK, illustrating the genre's far-reaching influence. The analysis reveals a young, engaged audience, with 80% of followers under 35, challenging the stereotype of electronic music's appeal being confined to the clubbing demographic. Moreover, the UK's contribution to the global electronic music landscape is significant, with its artists occupying 15% of the top 200 spots but commanding 36% of the UK's digital demand and making substantial inroads into the US market. This snapshot underscores the economic and cultural vitality of electronic music in the UK, propelled by both legendary and emerging talents.

3.4. Electronic Music Audience Segmentation **NEW THIS YEAR**

The electronic music scene in the UK is not just thriving; it's resonating across a broad and diverse audience spectrum, far beyond the confines of any niche. At the heart of this vibrancy is the discovery that electronic music serves as a universal language, uniting individuals from various backgrounds with a shared rhythm. From Electronic Enthusiasts and Digital Trend Trailblazers to Sports Fans and Intellectual Trendsetters, the audience's diversity underscores the genre's unique capacity to bridge digital and real-life experiences. This segmentation reveals the immense potential for growth, innovation, and community building within the electronic music industry, highlighting the importance of embracing and nurturing this diversity to ensure the genre's continued evolution and accessibility for everyone.

4. Electronic Music's Subcultures **NEW THIS YEAR**

The UK's electronic music scene is a rich tapestry of subcultures, each contributing to a vibrant and inclusive musical landscape. With a range spanning from underground techno to globally recognised genres like drum and bass and dubstep, these subcultures not only signify the UK's pivotal role in the genre's evolution but also highlight its capacity to foster community and drive cultural innovation. Efforts by collectives such as Daytimers, Eastern Margins, and Pxssy Palace, alongside initiatives like the Black Artist Database and EQ50, underscore a commitment to diversity, inclusion, and mental health within the scene. Electronic music's influence extends into fashion, technology, and social change, illustrating its integral role in shaping British identity and cultural trends. Despite facing challenges from gentrification and economic pressures, grassroots movements and campaigns like Save Our Venues emphasise the community's resilience and the importance of preserving the cultural and social value of electronic music in the UK.

5. Communities and Culture. Further benefits of electronic music **NEW THIS YEAR**

Electronic music's influence extends far beyond the realm of entertainment, serving as a vital catalyst for community and cultural development. Research highlights how dance music fosters a sense of belonging, supports mental well-being, and promotes social bonding, challenging the outdated perceptions of nightclubs. With clubs acting as venues for creative expression, identity exploration, and social intimacy, the electronic music scene is a significant contributor to the cultural and communal landscape. Its impact on fashion, visual aesthetics, and art underscores the genre's role in shaping contemporary cultural trends. As the electronic music community continues to grow, its positive effects on society highlight the need for further recognition and support, ensuring its contributions to culture and well-being are fully appreciated and nurtured.

I. The importance of electronic music to the UK economy

This chapter unfolds the story of the UK's electronic music industry, revealing its economic and cultural power. Starting with the impact of recorded music, we spotlight how UK artists like Calvin Harris and Joel Corry dominate the airwaves, underscoring the genre's financial significance. We then dive into the dynamic world of live electronic music, from the energy of festivals to the creativity of concerts, showing their vital contribution to the economy and culture.

The narrative shifts to the challenges and importance of electronic music nightclubs, touching on declining visits and spending, yet highlighting their indispensable role in the cultural scene. Insights into the broader economic aspects surrounding electronic music, including job creation, innovation, and tourism, show the genre's wider influence.

The chapter wraps up by quantifying the total economic impact of electronic music, combining insights from recorded music, nightclubs, and live events. This concise overview not only showcases the industry's financial value but also celebrates its role in fostering community and culture, making a case for continued support and recognition of electronic music as a key part of the UK's cultural and economic landscape.

I.1. Recorded music and music publishing

This section offers an in-depth examination of the UK's recorded electronic music scene, highlighting the significant airplay and cultural influence of local artists like Calvin Harris, Joel Corry, and Sigala. It presents data on dance music's increased share in UK singles revenue and its dominance in the charts, reinforcing the genre's popularity and the strong support it enjoys within the country. Through case studies and genre exploration, the text delves into the UK's contribution to global music through the creation of new genres, showcasing the cultural and economic significance of electronic music. It then quantifies the direct financial impact of recorded electronic music, setting the stage for discussions on its broader influences across other musical genres and its considerable export value, thus painting a comprehensive picture of the sector's vitality and its pivotal role in the UK's cultural export.

Radio

UK artists are undoubtedly dominating the landscape of electronic music radio airplay within their home country. Leading the charge is Calvin Harris, who sits at the pinnacle with an impressive 164.5K spins. His reach and influence in the UK electronic music scene are unparalleled, setting a high standard for other artists in the genre. Following closely is Joel Corry, another homegrown talent, with 144.5K spins. His presence reinforces the UK's strong inclination towards supporting its local artists.

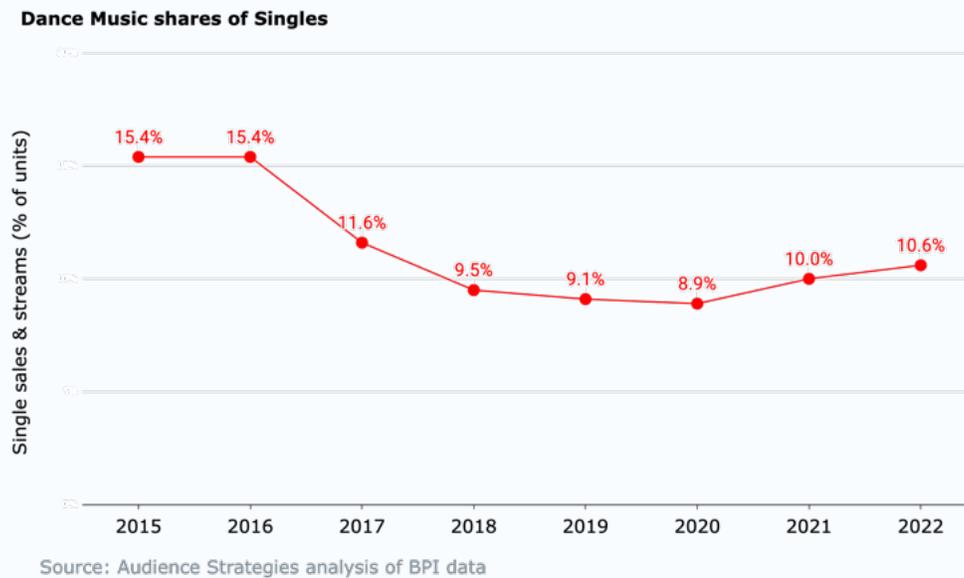
Sigala, another UK artist, takes the third spot with 70.9K spins, adding to the list of British artists who are shaping the soundscape of electronic music in the country. The fourth position is held by Erasure, an enduring name in the UK electronic scene, with 67.4K spins, further highlighting the diverse range of UK talent in this genre.

Notably, Jax Jones, another British artist, ranks sixth with 58.6K spins, while NATHAN DAWE and Jonas Blue, both from the UK, take the eighth and ninth spots with 47.7K and 47.6K spins, respectively. This significant representation of UK artists in the top ranks is a clear indicator of the country's thriving electronic music scene and its loyal audience base. The

dominance of UK artists in radio airplay within the country not only showcases their popularity but also the strong support system for electronic music in the UK, fostering a vibrant and influential cultural and musical environment.²

Streaming

Dance music increased its share of UK singles in the overall UK market in 2022 to 10.6%, up 6% from 10.0% in 2021.³



The top of the charts are even more skewed to dance music. In 2023, dance tracks were the third biggest genre behind pop and hip hop/rap on the Official Singles Chart, claiming 15.5% of the tracks reaching the weekly Top 10.

Although dance's total was down compared to 2022 (20.0%), it was still 66.2% higher than previous years.⁴

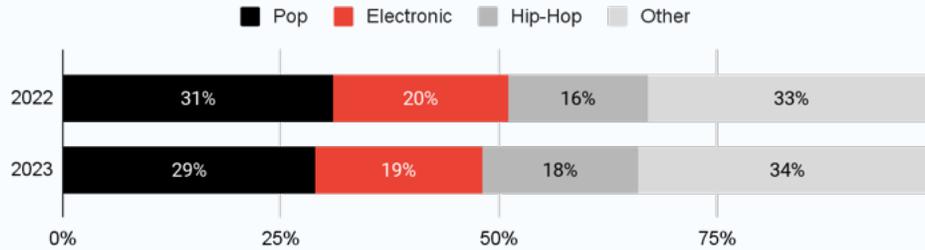
² Source: Audience Strategies analysis of data from Viberate on January 22nd 2024

³ Source: Audience Strategies analysis of data from BPI.

⁴ Analysis by Paul Williams at the BPI. Previous years: 2021 (14.6%) and 2020 (12.0%) 2019 (9.3%)

Looking at digital music services alone (including YouTube, Shazam and beyond), Viberate, a music analytics service, ranks electronic music as the second most popular genre after Pop. This is consistent across the country - using Chartmetric, we can see that Dance music is second on Shazam in London, Bristol, Manchester and beyond.

Electronic music is the second most popular genre on digital music services



Source: Viberate analysis of Shazam, YouTube and other services

If we deep-dive into Spotify, we learn more about the UK's passion for electronic music. The UK ranks fourth globally with 169.2 million Spotify monthly listeners for electronic music artists combined, showcasing its strong cultural engagement with the genre. London, as a city, stands out with 82.6 million listeners, the second highest globally, affirming its status as a key influencer in the electronic music scene.⁵

⁵ Source: Audience Strategies analysis of Spotify data from Viberate. The number counts monthly listeners from London for all electronic music artists and adds them together. Hence it counts each listener once for each artist they listen to. Above the UK, Germany leads with 369.2 million listeners, the USA has 342.6 million, and Australia boasts 275.3 million, underscoring their dominant roles in the global market. Sydney is the top city with 98.6 million listeners, reflecting its vibrant electronic music scene. These numbers not only reflect popularity but also the cultural importance of electronic music within these countries.

Case study: The UK creating new global genres

The UK's electronic music scene is a source of immense pride and a testament to the country's cultural prowess. From the birth of house music in the 1980s to the rise of grime in the early 2000s, the UK has been at the forefront of electronic music innovation.

Think of the UK's electronic music scene as a musical melting pot, where different genres and sounds come together to create something truly unique and captivating. The result of this musical alchemy is a host of globally popular genres, including drum and bass, dubstep, UK garage, grime, bassline, breakbeat, and jungle.

- **Jungle:** originated in the UK in the early 1990s and is characterised by fast breakbeats, deep basslines, and cultural influences from reggae, hip hop, and soul music.
- **Drum and Bass:** Originated in the UK in the mid-1990s and is characterised by fast-paced, breakbeat-driven rhythms and heavy basslines.
- **Progressive House:** Originated in the UK in the 1990s and is characterised by lush, musical soundscapes and evolving musical structures.
- **UK Garage:** A subgenre of house music that originated in the UK in the 1990s and is characterised by its soulful vocals, funky basslines, and use of 2-step beats.
- **Dubstep:** Originated in London in the early 2000s and is characterised by its deep, bass-heavy sound and use of complex rhythms and sound design.
- **Grime:** Originated in London in the early 2000s and is characterised by its MC-led vocals, fast-paced beats, and dark, bass-driven instrumentals.
- **Bassline:** A subgenre of UK garage that originated in the UK in the early 2000s and is characterised by its use of fast, bass-driven beats and heavy basslines.
- **Future House:** Originated in the 2010s and is characterised by its use of futuristic synth sounds, heavy basslines, and smooth, groovy beats.
- **Bass House:** Originated in the UK in the 2010s and is known for its heavy basslines, aggressive synth sounds, and fast-paced beats.
- **Trip Hop:** Originating in the early 1990s, particularly in Bristol, it blends elements of hip hop, electronica, and downtempo and is known for its atmospheric, laid-back style.
- **Breakbeat/Hardcore:** A precursor to jungle and drum & bass, it evolved in the early 1990s and is characterised by breakbeat rhythms and heavy bass.
- **Big Beat:** Popular in the 1990s, this genre blends elements of techno, rock, and hip-hop. Artists like The Chemical Brothers and Fatboy Slim are prominent figures in this genre.
- **2-Step Garage:** A subgenre of UK Garage, it emerged in the late 1990s, known for its shuffling beats and syncopated rhythms.
- **Electronica/IDM (Intelligent Dance Music):** While not exclusive to the UK, the country has been influential in this genre, with artists like Aphex Twin and Boards of Canada contributing significantly.

Each of these genres has a distinctive sound and style, yet they all share a common thread - the UK's innovative spirit. This spirit is what makes the UK's electronic music scene so special and sets it apart from the rest of the world.

The impact of the UK's electronic music culture goes far beyond just the music itself. It attracts tourists from around the world, who come to experience the country's vibrant music scene and soak in its cultural heritage. The UK's strong electronic music culture also serves as an inspiration to young musicians and producers, who are eager to make their

mark on the world and carry on the UK's musical legacy.

“... The UK has one of, if not the most diverse electronic music scenes in the world. House and Techno are the two most popular genres on our platform. Globally, they represent around 40% of all events; however, in the UK, it's only 30%, with a big representation of scenes like DnB, Jungle, Bass and Garage. Why is this? I believe the best thing about our country is its diversity. Our music scene is a pure reflection of this ...”
- David Selby, CEO, Resident Advisor

“... Music is one of the drivers to the UK economy and should continue to be valued as such. In 2023, 13% of the new members we welcomed described themselves as Electronic / Dance music creators, the second most prevalent genre. We will continue to champion the sector and support our membership, the electronic music community and the business around it ...”
- Ashley Howard, Relationship Manager for Dance Music, PRS for Music

Influencing other genres

The contemporary music scene is a testament to the transformative power of electronic music, with a significant impact on many other genres. Our analysis reveals that an impressive 73% of the top 30 global artists have been heavily influenced by electronic music. This trend is evident in the work of artists like The Weeknd, whose atmospheric R&B sound is enriched with elements from house and synthwave. Ariana Grande, another pop powerhouse, incorporates electronic beats ranging from EDM to trap and R&B, demonstrating the genre's versatility. Similarly, Justin Bieber's musical evolution is marked by his exploration of EDM, tropical house, and electro-pop, evident in albums like 'Purpose' and 'Changes'.

In the Latin music sphere, Karol G has skillfully fused electronic music with Latin rhythms, creating an infectious reggaeton sound. Drake's blend of rap, R&B, and pop, infused with UK garage and dancehall, showcases the adaptability of electronic music in enhancing various genres. Meanwhile, Bad Bunny's unique sound, a blend of electronic music with Latin styles like reggaeton, stands as a hallmark of innovation in the genre. Billie Eilish and Rihanna, both pop icons, have also experimented with electronic music. Eilish's use of dubstep and glitch complements her indie and hip-hop influences, while Rihanna's 'Rated R' album features a blend of dubstep, electro, and rock.

Conversely, artists such as Taylor Swift, Eminem, and Ed Sheeran, though occasionally experimenting with electronic influences, predominantly adhere to their original styles. Swift's foray into synth-pop and electro-pop is an exception in her otherwise country and pop-dominated discography. Eminem's exploration of electronic music is seen in collaborations with producers like DJ Khalil on his 2010 album 'Recovery'. Ed Sheeran, known for his acoustic and folk-pop roots, has also dabbled in electronic music, as seen in hits like "Shape of You". This diversity in music preferences underscores the richness and variety in the global music landscape, highlighting how artists maintain their unique styles while occasionally blending in electronic influences.

We looked at the top 30 artists in the world over the last 12 months using Viberate and analysed whether they've been significantly influenced by electronic music or not. 73% had!

- Top 30 artists who we deemed to have been **significantly influenced** by electronic music: The Weeknd, Ariana Grande, Karol G, Justin Bieber, Drake, Bad Bunny, Billie Eilish, Rihanna, BTS, Shakira, Dua Lipa, Coldplay, Selena Gomez, BLACKPINK (블랙핑크), Katy Perry, Doja Cat, Nicki Minaj, Jason Derulo, Post Malone, Travis Scott, Beyonce, Imagine Dragons.
- Top 30 artists who we deemed to have **not been significantly influenced** by electronic music: Taylor Swift, Eminem, Ed Sheeran, Olivia Rodrigo, Bruno Mars, Adele, Lana Del Rey, Mariah Carey.

Export value

The United Kingdom's influence in the electronic music scene is strikingly evident, particularly with its artists leading the global electronic music charts in radio play. Calvin Harris, a British electronic music powerhouse, stands at the forefront, ranked first globally with an impressive 1.8 million spins. His music resonates across 141 countries and is featured on over 6,400 radio stations, showcasing the universal appeal and dominance of the UK's electronic sound. Additionally, Joel Corry, another prominent UK artist, makes a significant mark in the global top 10. Specialising in house music, Corry has achieved nearly 960.7K spins in 114 countries and is played on around 3,700 stations. This representation of two UK artists in the global top 10 for radio play not only highlights individual successes but also underscores the UK's pivotal role in shaping the electronic music landscape internationally.⁶

But it's not just the domestic value of UK electronic music that counts. The United Kingdom reigns as the second biggest music exporter globally, trailing only behind the United States. In 2022, the exports of recorded music across all genres from the UK hit a record high of £709 million, representing 20% growth year-on-year!⁷

Adding it up: The economic contributions of recorded electronic music and music publishing

We calculate that electronic music is worth about £87m in recorded music and £44.8m in music publishing in the UK, totalling £131.8m. Up 10% from 2022! (From £79.0m in recorded music and £40.7m in music publishing in 2022 for a total of £120.0m.)⁸ Thanks to a jump of 4% in the UK recorded music market and a 3% jump in electronic music's market share.⁹

Further, we estimate £52.0m worth of electronic music exports and £26.8m of electronic music publishing exports, totalling £78.7m. This is up 26% on 2021 thanks to a massive 20% jump in total music exports and a 3% jump in electronic music's market share.¹⁰

In total, therefore, we calculate that, across recorded music, publishing and exports, electronic music was worth a total of £210.6m in 2023, up 16% on the £182.2m we calculate for 2022.

⁶ Source: Audience Strategies analysis of data from Viberate on January 22nd 2024

⁷ <https://www.ukmusic.org/news/new-report-reveals-music-industry-delivers-4bn-exports-boost-to-uk-economy/>. Note on UK Music export numbers: Over the past year, UK Music's This Is Music 2023 does not offer direct comparisons with previous years for exports owing to a change in methodology.

⁸ Source: Audience Strategies analysis of data from 2021. Recorded music analysis based on combining a selection of data from BPI. Publishing estimates from various sources including <https://tarzaneconomics.com/undercurrents/music-copyright-2021>

⁹ Source: Audience Strategies analysis of data from BPI, IFPI and estimates from leading industry economists.

¹⁰ Source: Audience Strategies analysis of data from BPI, IFPI and estimates from leading industry economists.

I.2. Live electronic music outside of clubs: festivals and concerts

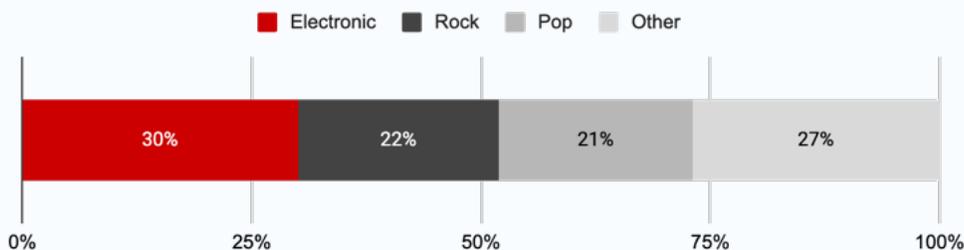
This section delves into the world of live electronic music outside the nightclub scene, showcasing its influence on the UK economy and culture. Focusing on the genre's dominance in festivals, the analysis provides insights into its popularity, with electronic music festivals accounting for a significant portion of the UK's festival market. It details the growth in festival attendance and economic contributions, highlighting the UK's global leadership in the global electronic music festival scene. Through an exploration of concerts and other live events, the section also examines the broader economic impact of live electronic music, including spending on tickets, food, and transport. It paints a picture of a dynamic sector that not only entertains but also significantly contributes to the UK's cultural and economic landscape, reflecting on both the challenges and opportunities that lie ahead for sustaining its growth and vibrancy.

Festivals

While electronic music's heart is in its nightclubs, it is also a hugely popular genre in live concerts and festivals. Live electronic music performances can take many forms, from solo DJs playing sets to full-scale electronic music ensembles with live instrumentation and vocalists. These concerts and festivals allow electronic music fans to experience their favourite artists and songs in a live setting, often with enhanced production values, light shows, and special effects.

Viberate, a music analytics service, calculates that electronic music is the most common genre in UK festivals, making up 30% of artists performing. Rock (22%) and Pop (21%) are second and third, respectively.

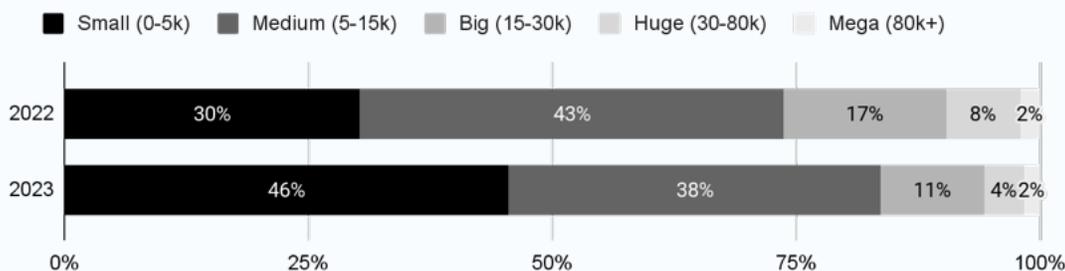
Electronic music is the most popular genre at UK music festivals



Source: Viberate analysis of festival lineups

Most electronic music festivals are small (0-5k attendees) or medium-sized (5-15k). 94% of all 2023 festivals with electronic music are under 30k attendees, up from 90% in 2022.

Most electronic music festivals are small or medium-sized



Source: Audience Strategies analysis of Viberate festival data based on lineups

The United Kingdom is a global leader in the electronic music festival scene, ranking third in Viberate’s analysis of the world for the number of festivals that include electronic music. This is a remarkable feat, considering the intense global competition in this sector. With an impressive 294 festivals featuring electronic music, the UK showcases a diverse range of talent, hosting approximately 19,500 artists at these events. This figure not only highlights the UK’s commitment to nurturing and promoting electronic music but also underscores its significant role in shaping the global landscape of this genre. The sheer volume of festivals and artists involved speaks volumes about the UK’s influence and the vibrancy of its electronic music culture, contributing substantially to both the cultural and economic fabric of the nation.¹¹

Across the 294 festivals Viberate identified as including electronic music in 2023 (up from 145 they identified in 2022), we calculate that 2.7m people attended (up 7% from 2.5m in 2022). Within this, 143 identified festivals led with electronic music in 2023 and were classified as ‘primarily electronic’ festivals.

¹¹ Source: Audience Strategies analysis of data from Viberate on January 22nd 2024

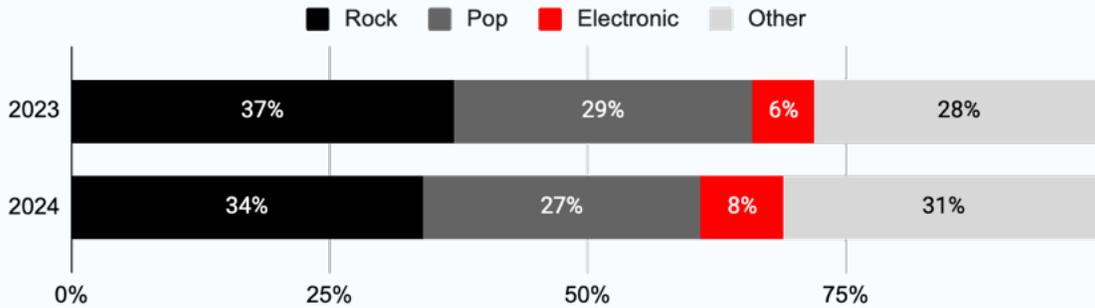
We calculated the measurable economic impacts of UK festivals that include electronic music, and the results are truly staggering. The latest figures paint a picture of a sector experiencing robust growth, contributing an impressive £567.8 million to the UK economy in 2023, marking a 9% increase from the previous year. This growth is driven by a 7% rise in festival attendees, reaching 2,653,600, showcasing the genre's escalating appeal and its ability to draw crowds. The detailed spending breakdown reveals a nuanced picture of consumer behaviour: money spent in prep climbed to £33.5 million, reflecting a 6% increase, indicative of the meticulous planning and investment that goes into attending festivals. Despite a static spend on drinks at the venue, with a slight dip to £90.6 million, the entry fees surged by 13% to £281 million, underscoring the value placed on the festival experience itself. Transport expenses saw a modest rise to £75.9 million, a 2% increase, while spending on food experienced a significant jump of 17%, amounting to £86.7 million, highlighting the growing importance of food offerings in enhancing the overall festival experience. These figures underscore the significant economic contribution of electronic music festivals and highlight the sector's dynamic nature and critical role in the UK's broader cultural and economic landscape.

| | 2022 | 2023 | Percentage change |
|--------------------------|----------------|----------------|-------------------|
| Festival attendees | 2,480,000 | 2,653,600 | 7% |
| Festivals | | | |
| Daytime spending in prep | £31.7m | £33.5m | 6% |
| Drinks in the venue | £90.8m | £90.6m | 0% |
| Entry fee | £248.0m | £281.0m | 13% |
| Transport | £74.4m | £75.9m | 2% |
| Food | £74.4m | £86.7m | 17% |
| Festivals total | £519.3m | £567.8m | 9% |

Concerts

In addition to the impact of festivals and nightclubs, our study also considers the economic contribution of concerts and other live electronic music events. Since most electronic music is consumed in nightclubs or festivals, we see electronic music take somewhat a back seat here, coming in third in the list of genres, albeit growing from 6% in 2022 to 8% in 2023!

Electronic music is the third most popular type of UK event



Source: Viberate analysis of event lineups

Thanks to Chris Carey, FFWD Consulting. The results of this analysis show that concerts and other live electronic music events are continuing to make a notable impact on the economy, with the total economic contribution rising to £285.5m, marking a 5% increase from the previous year's £272.3m. This growth is driven by several key areas, notably food spending, which surged by 12% to £47.2m, reflecting an increased appetite for dining experiences tied to electronic music events. Meanwhile, entry fees saw a significant 9% increase to £119.4m, underscoring the growing value audiences place on accessing these unique live performances. Despite these gains, some sectors experienced declines, such as drinks in the venue, which dropped by 4% to £49.4m, and transport, down by 2% to £16.7m, indicating shifting consumer behaviours and preferences in how they engage with live events. Notably, the slight increases in daytime preparation spending to £18.3m and pre-drinks to £34.5m suggest a stable commitment to the overall event experience. These findings illuminate the dynamic and significant role that electronic music concerts and events play in the UK's economy, not just in direct financial terms but also in fostering a vibrant cultural ecosystem that extends beyond festivals and nightclubs. By capturing both the direct and indirect economic impacts, this analysis paints a comprehensive picture of the electronic music industry's economic prowess and its evolving landscape in the UK.¹²

¹² Source: Chris Carey, FFWD Consulting, based on ticket sales, market share, and assumptions of other spend around events and LIVE's own data

| | 2022 | 2023 | Percentage change |
|--------------------------|----------------|----------------|-------------------|
| <u>Concerts</u> | | | |
| Daytime spending in prep | £18.0m | £18.3m | 2% |
| Transport | £17.0m | £16.7m | -2% |
| Food | £42.1m | £47.2m | 12% |
| Pre-drinks | £34.1m | £34.5m | 1% |
| Drinks in the venue | £51.5m | £49.4m | -4% |
| Entry fee | £109.6m | £119.4m | 9% |
| Concerts total | £272.3m | £285.5m | 5% |

What we heard

“... I believe the UK government should view electronic music as a legitimate cultural art form, similar to how Germany or Holland does ...”
- Carl Loben, Editor-in-Chief, DJ Mag

“... TikTok seems to be the biggest one in the game. Facebook is no longer popular, and Instagram is all right, but it feels like it's a bit on the wane. This year, we have been doing a lot more hand-to-hand stuff on nights itself, which feels retro but exciting. Since not many people are doing it, it's almost quite novel that people engage with it because they're not used to seeing it ...”
- Patrick Somers, DHP Family

“... Influence of TikTok is big. TikTok is king. All new music is discovered on TikTok by the younger generation ...”
- Rob Searle, Head of Entertainment & Music, REKOM UK

1.3. Nightclubs

This section delves into the significant economic and cultural challenges faced by the core of the UK's night-time economy, with a focus on the downturn in nightclub numbers, attendance and spending. The analysis explores the economic shifts within the nightclub sector, showing a 14% decrease in total spending in 2023 compared to the previous year. It outlines the contributions of nightclubs to the UK economy, noting a decline in both direct and indirect spending by patrons, alongside a reduction in the number of operational nightclubs. Despite these challenges, the section underscores the continued importance of nightclubs as cultural and economic institutions, advocating for strategic support to revitalise this sector and ensure its sustainability within the UK's cultural landscape and economy.

Adding it up: The economic contributions of nightclubs that we could measure

The economic landscape for electronic music nightclubs has seen notable shifts in the past year, according to the most recent data. We calculate that there were 90.0m nights out in nightclubs in 2023, down 9% on the 98.6m from 2022.¹³ We estimate the total spending associated with nights out in nightclubs to have been £1,457.3m in 2023, marking a decrease of 14% from the previous year's £1,699.0m.¹⁴

This is driven in part by the number of nightclubs having decreased. The number of GB nightclubs decreased by 4% from 882 in 2022 to 875 in 2023. A net loss of 31. This contraction in the number of venues partially explains the reduction in total economic impact, but there is a lot more going on in addition.

Indirect spending, which includes the costs incurred in preparation for a night out, transportation to the venue, food, and pre-drinks, fell to £833.0m from £955.4m in 2022. Specifically, daytime spending on preparation decreased by 13% to £178.6m, spending on transport saw a 16% reduction to £163.7m, food-related expenditures dropped by 5% to £153.6m, and spending on pre-drinks declined by 14% to £337.1m.

Direct spending within the venues also experienced a downturn. We estimate that expenditures on drinks inside the venues decreased by 18% to £483.1m, and entry fees saw a 7% reduction to £141.2m. This overall decline in spending is indicative of a contraction in the economic footprint of electronic music nightclubs but also of changing consumer behaviour within the sector.

¹³ Source: Audience Strategies analysis of REKOM's UK NIGHT INDEX and CGA by NIQ On Premise Measurement Service. Combined with updated estimates from leaders in the industry and leading industry economists.

¹⁴ Source: Audience Strategies analysis of REKOM's UK NIGHT INDEX and CGA by NIQ & AlixPartners Hospitality Market Monitor. Combined with updated estimates from leaders in the industry and leading industry economists.

Here's our detailed analysis of the economic contribution of UK nightclubs:

| | 2022 | 2023 | Percentage change |
|----------------------------|------------------|------------------|-------------------|
| Number of nightclubs* | 907 | 875 | -3% |
| <u>Nightclubs indirect</u> | | | |
| Daytime spending in prep | £206.5m | £178.6m | -13% |
| Transport | £196.0m | £163.7m | -16% |
| Food | £161.0m | £153.6m | -5% |
| Pre-drinks | £391.9m | £337.1m | -14% |
| <u>Nightclubs direct</u> | | | |
| Drinks in the venue | £591.4m | £483.1m | -18% |
| Entry fee | £152.2m | £141.2m | -7% |
| Nightclubs total | £1,699.0m | £1,457.3m | -14% |

Source: Source: Audience Strategies analysis of REKOM's UK NIGHT INDEX and CGA by NIQ Outlet Index. Combined with updated estimates from leaders in the industry and leading industry economists.¹⁵

¹⁵ Raw data on the number of nightclubs is for GB (i.e. UK excl. Northern Ireland) shows a decrease of 4% from 882 in 2022 to 875 in 2023. A net loss of 31. This comes from the CGA by NIQ On Premise Measurement Service (December 2023). Audience Strategies has estimated the Northern Ireland share (marked with *) and added it to create an overall picture of the UK.

Reflections on the trends underpinning the results

Here, we'll dig into four underlying trends that drive the results seen above: cost of living, a focus on weekends, less drinking and a drive for fewer, bigger, better events.

Cost of living: Firstly, the cost of living crisis is clearly driving a change in behaviour. REKOM's research showed that 77% of people said the cost of living crisis has cut down the number of times they go on a late night out. But, at the same time, habits are changing. And with the cost of operating a venue increasing rapidly and the cost of talent rising, up go the prices. Making the cost of living pinch even more.

"... The cost of living crisis has really bitten hard.

We're noticing that the market has compressed by 20 to 30%, both in people coming out and in bar sales ..."

- Pete Jordan, Director / Founder of Weird Science & MADE Festival

"... The biggest change in buying behaviour has been since COVID.

Things have not been selling out as fast. People have been deciding late.

Higher prices make it more of a barrier than it used to be ..."

- James Busby, Detonate (Nottingham promoters)

*"... Young people are being much, much more selective about how they go out these days...
picking one, two nights to go out within a week.*

And with the cost of living, people are coming out much later to gigs and buying fewer drinks when they do.

Multibuys and promotions behind bars seem to be more important than ever. ..."

- James Slater, Venues & Operations Manager, Nottingham Trent Students' Union & The Level

A focus on weekends: Peter Marks, Chairman of REKOM, says that, in response, the overall state of the night-time industry has seen a significant downturn. Particularly in the midweek. He notes that the midweek business is severely impacted, with a noticeable decline in the frequency of visits, reduced dwell times, and overall spending by patrons. This trend is exacerbated by the rising cost of living, which has tangibly affected consumer behaviour, leading to later arrivals at venues during weekends and a visibly reduced footfall in city centres during early weekdays. This is leading to venues closing on nights when they can't pull a big crowd, as Carly Heath notes:

"... Clubs known across the country for incubating new scenes are closing on a Monday, Tuesday, or Wednesday night.

That's a massive red flag for the new sounds of the future ..."

- Carly Heath, Night Time Economy Advisor for Bristol

Less drinking: Mixmag researched the trend for younger people to drink less with an article about how 44% of young people say they now prefer low or non-alcoholic drinks. The article¹⁶ highlights a significant shift towards sobriety among young people in the UK, particularly within the 18 to 24-year-old demographic. According to the Portman Group's sixth annual survey, conducted in partnership with YouGov, 39% of this age group do not consume alcohol at all, and 44% prefer low or non-alcoholic drinks—a 13% increase from the previous year. This trend is not limited to young people; 75% of UK drinkers have tried low or no-alcohol alternatives, demonstrating a broader move towards moderation. The survey suggests that these alternatives are seen as a vital tool for responsible drinking, with 23% of participants reporting a decrease in their

¹⁶ <https://mixmag.net/read/almost-half-of-young-people-say-they-would-either-drink-low-or-non-alcohol-drinks-news>

overall alcohol intake when opting for these products. The growing popularity of low and no alcohol beverages is also linked to a desire to avoid excessive drinking at social events and the necessity to drive home safely.

REKOM dug into this in December 2023 research showing that nearly half (46%) regularly go on a late night out without consuming alcohol – this was particularly prevalent for those aged 25-34 (54%). Over half (52%) said that they now consume less alcohol on a night out compared to a year ago. This rose to 60% for 25-34-year-olds, and among students, it was 49%.

“... We never make money on tickets. The door helps to cover our expenses but doesn't really make much of a profit; it gets people in the door, and we mainly rely on people coming in and spending money at the bar. At the moment, people are coming out but not drinking ...”
- Stuart Glen, Co-founder and MD, The Cause

Fewer, bigger, better: Finally, there is a big move towards mega raves and special events that appeal to a desire for shared, memorable experiences. This preference is partly driven by how events are showcased on platforms like TikTok, favouring large-scale productions over smaller, intimate club settings. Jules O'Riordan (AKA Judge Jules) highlighted this big trend in the UK's electronic music landscape, underscoring the shift away from traditional club nights towards a model dominated by large-scale, event-driven gatherings. The trend is epitomised by high-profile venues such as Drumshed and The Warehouse Project, which have successfully attracted diverse audiences through an eclectic mix of events. According to Jules, "The landscape of UK electronic music is undeniably evolving. Traditional clubs are finding themselves in the shadow of large, one-off events that offer a unique experience each time. It's a seismic shift that's redefining how we engage with electronic music." This observation is corroborated by the data in the report, indicating an increase in festival attendance while nightclub footfall sees a decline. Jules' commentary signals a crucial juncture for the industry, suggesting that smaller venues must pivot and adapt to remain relevant in an increasingly event-centric market.

“... 18 to 24-year-olds are going to fewer events but spending more per ticket for premium experiences. Health and fitness is a high priority for this demographic too - and this has had a major effect on going out ...”
- Duncan King, Head of Festivals & Partnerships, Skiddle

“... I think the one-off event is stronger than ever, really, but it very much is at the expense of the smaller nightclubs. ...”
- Jules O'Riordan (AKA Judge Jules), Sound Advice

A vicious cycle: Of course, as venues shut down, fewer people discover and fall in love with the unique club atmosphere, leading to further closures. All of the above lead to a vicious cycle, as Billy Mauseh, Director of Brighton Music Conference, pointed out.

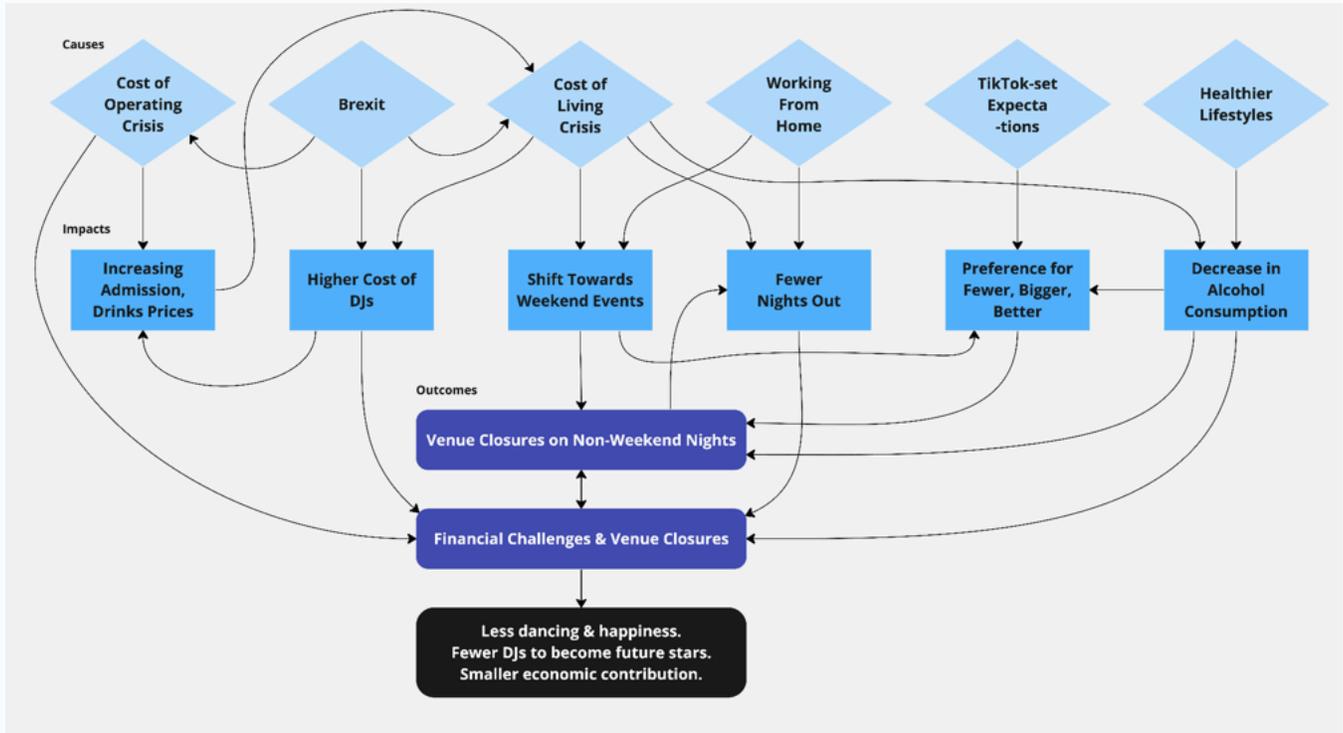


Diagram: Our interpretation of the causes, impacts and outcomes that are reshaping nightclubs.

“... Our venues are threatened due to rising costs. Our artists are under threat as the economic situation in the country and industry is incredibly challenging. I'm not saying it's impossible to make it work, but it's just really hard, and it's getting harder ...”
- David Selby, CEO, Resident Advisor

Economic contributions we couldn't measure

There are many ways that nightclubs contribute to the economy that we couldn't measure this year. Here, we describe them for completeness.

Nightclub 🎧 equipment

The UK nightclub market relies heavily on equipment such as sound and lighting systems to create the immersive and interactive experiences that patrons have come to expect. The use of cutting-edge technology and high-quality equipment is essential to the success of electronic music nightclubs, and this industry is a significant contributor to the overall economic impact of electronic music.

The production and distribution of sound and lighting equipment is a thriving industry in its own right, with manufacturers investing heavily in research and development to produce new and innovative products. This industry provides jobs for engineers, technicians, and sales and marketing professionals, and it also generates significant revenue through the sale of equipment to nightclubs and other entertainment venues.

Note: We have not attempted to calculate the economic impact of equipment in this year's report.

Nightclub 🍹 supply chains

The supply chains for UK nightclubs are complex and multifaceted, encompassing a wide range of products and services that are essential to the success of these venues. The supply chains for UK nightclubs include everything from the procurement of sound and lighting equipment (above) to the production and distribution of beverages to the provision of security and cleaning services.

The supply chains for UK nightclubs are a significant contributor to the overall economic impact of electronic music, as they provide jobs and generate revenue for a wide range of industries. For example, the procurement of sound and lighting equipment creates jobs for engineers and technicians, while the production and distribution of beverages creates jobs for bartenders and servers.

Cleaning and security are crucial components of UK nightclubs' supply chain, ensuring safety, cleanliness, and enjoyment for patrons. Cleaning services maintain hygiene, creating jobs for cleaners and contributing to the economic impact of electronic music. Security services ensure safety, creating jobs for security personnel and promoting the UK as a safe destination for electronic music.

Note: We have not attempted to calculate the economic impact of supply chains in this year's report.

Nightclub 🍷 employment

Nightclubs provide a wide range of employment opportunities for people in various roles. In addition to performers such as DJs and live electronic music artists, nightclubs also require staff to support the venue's operations. Bartenders are responsible for serving drinks, while security staff ensure the safety of patrons. Lighting and sound technicians are essential to creating the immersive experience synonymous with nightclubs, ensuring that the music and lights are carefully synchronised to enhance the overall atmosphere. Other nightclub roles include door personnel, servers, cleaners, and management. These employment opportunities can offer stable and rewarding careers for individuals in the hospitality and entertainment industries. Whether behind the bar or on the dancefloor, nightclubs offer a vibrant and dynamic working environment that can provide meaningful employment for people from various backgrounds and skill sets. There are about 9m nighttime workers total.¹⁷ The total number of nighttime workers associated with cultural and leisure activities is 2.1m. This figure comprises two sub-categories: nighttime culture and leisure activities, which make up 874,400 workers, and activities which support nighttime cultural and leisure activities, which account for 1.2m workers. These workers contribute to the night-time economy, helping to provide various services, experiences, and entertainment options for people engaging in cultural and leisure activities during the night.

"... There's a lot to it, and every sort of venue, and every sort of person plays their part. Culturally, it's very important, but also the business behind it, and the opportunities it gives people to travel the world to perform other places, to get paid ... it's just essential that we exist. It's a lack of understanding and people might go quite dispersive to what we do and kind of hypocritical and just don't seem to be interested in it..."
- Stuart Glen, Co-founder and MD, The Cause

(Night time workers can be broadly categorised into two groups: those who work in night time cultural and leisure activities and those who work in activities that support these cultural and leisure activities. Some examples of workers in the first category include hotel workers, restaurant workers, event caterers, security personnel, artists and entertainers, gamblers, sportspeople, and recreational workers. Examples of workers in the second category include retail workers, public transportation workers, security system service workers, and holiday accommodation workers.)

Our calculations conclude that about 60 thousand jobs are nightclub-related.¹⁸

Note: We have not attempted to calculate the economic impact of this employment in this year's report.

"... Back in the day, we were just looked at as a bunch of hobbyists, really. As time went on, the whole scene became more of a recognisable business. A lot of the kids these days are seeing it as a proper job now. There's a lot of support now, you know, with various conferences, colleges, and mentor schemes ..."
- Billy Mauseth, Director, Brighton Music Conference

Nightclub 🏠 tourism

¹⁷ "The night-time economy, UK: 2022" from ONS at <https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/articles/thenighttimeeconomyuk/2022overview-of-the-night-time-workforce>

¹⁸ Source: Audience Strategies analysis of data from "The night-time economy, UK: 2022" from ONS plus data from CGA by NIQ & AlixPartners Hospitality Market Monitor. Combined with updated estimates from leaders in the industry and leading industry economists.

Nightclubs can play a significant role in attracting tourists to an area, which can have a positive economic impact on local businesses. As tourist destinations, nightclubs can generate substantial revenue for the local economy through the sales of tickets, drinks, and other products. The presence of nightclubs can also drive business for neighbouring bars, hotels, restaurants, and retail stores, as tourists often engage in additional activities and purchases while visiting the area. For example, tourists may choose to stay in local hotels, dine at local restaurants, or shop at local stores, which can boost the local economy. In addition, nightclubs can create jobs and provide employment opportunities, adding to the local economic impact. By attracting tourists and providing employment opportunities, nightclubs can have a significant and positive impact on the local economy, making them valuable contributors to the communities they serve.

In light of the recent Here, There and Everywhere report by UK Music, it's evident that the UK's music tourism sector, bolstered significantly by live events and festivals, plays a pivotal role in the national economy. This resurgence, particularly noted in 2022 with a staggering £6.6 billion generated from music tourism, underscores the profound economic impact of the music industry, inclusive of the electronic genre. The electronic music scene, renowned for its vibrant festivals and live events, contributes substantially to attracting 14.4 million music tourists, including 1.1 million from overseas. This influx not only supports a dynamic cultural landscape but also sustains 56,000 full-time jobs, highlighting the genre's critical role in community building and cultural inspiration.

*“... 25% of our customer base come here specifically from abroad,
and around 75% overall are from outside London ...”
- Jack Henry, Operations Director at EI*

The electronic music industry, with its unique blend of live events, festivals, and recorded music, embodies a significant portion of this economic and cultural boon. By fostering a sense of community and inclusivity, electronic music events are essential in positioning the UK as a global leader in music tourism. The Here, There and Everywhere report's findings align with our research, demonstrating how electronic music's influence extends beyond entertainment, contributing to the UK's economic prosperity and global standing. As we advocate for solutions to support artists, venues, and education within the electronic music sector, recognising its contribution is crucial for stakeholders and government bodies to ensure its continued growth and success. This alignment between the broader music industry's success and the electronic genre's specific impact illustrates the indispensable value of electronic music to the UK's cultural and economic landscape.¹⁹

Note: We have not attempted to calculate the economic impact of music tourism driven by electronic music in this year's report.

¹⁹

<https://www.ukmusic.org/news/music-tourism-boom-music-pulls-in-over-14-million-tourists-and-generates-6-6-billion-of-spending-as-harry-styles-and-dua-li-pa-help-attract-fans-to-events-across-the-uk/>

Nightclub 💡 innovation

Nightclubs can be a hub for developing new ideas and technologies related to music, lighting, and sound systems, leading to new products and services that generate economic activity.

*“... A lot of innovation comes out of electronic music... particularly with artificial intelligence.
Electronic music creators are like the modern-day Beethovens and Mozarts.
The classical sector has a strong link with things like the Arts Council... electronic music needs similar support ...”
- Tom Kiehl, Interim CEO, at UK Music*

Nightclubs can be a hub for developing new ideas and technologies related to music, lighting, and sound systems. This is because nightclubs are often at the forefront of innovation in these areas, constantly pushing the boundaries of what is possible regarding musical performance and technological advancement. This can lead to the development of new products and services that generate economic activity, as nightclubs often test and showcase the latest technology and products. For example, nightclubs may experiment with new lighting and sound systems, which can be developed into products for sale to other venues, businesses, and consumers. The innovative nature of nightclubs can also inspire new businesses and entrepreneurs to enter the market, creating new economic opportunities. By serving as a hub for innovation and experimentation, nightclubs can drive growth and development in the industries related to music, lighting, and sound systems, leading to increased economic activity and prosperity.

Note: We have not attempted to calculate the economic impact of innovation driven by electronic music in this year's report.

Case study: Fabric London

We spoke to Andy Blackett, Head of Promotions & Judy Griffith, Programming Director of Fabric London for insight into the challenges of running the iconic club.

Case Study: The State of UK Electronic Music Nightclubs

Introduction: The Evolving Landscape

Electronic music in the UK has undergone a remarkable evolution, carving out a unique space in the cultural and economic fabric of the country. Judy and Andy, key figures at Fabric, one of the UK's most iconic electronic music venues, offer an insightful perspective on this journey.

Economic Impact and Cultural Relevance

Electronic music's economic footprint is substantial, yet often underestimated. The sector not only contributes significantly to employment but also to the broader economy through related industries like hospitality and tourism. Despite this, there's a notable lack of government recognition and support, especially when compared to other cultural institutions. As Andy puts it, "We're seen as culturally relevant, but the government doesn't see us."

"... The economics are massive. The number of jobs we all have, and the number of jobs that were lost with COVID ... you realise how many people are employed by our sector..."

Nightclubs: The Unsung Heroes

Nightclubs, the beating heart of the electronic music scene, play a crucial role in nurturing talent and community. They are incubators for creativity, offering a platform for emerging artists. However, these venues face immense challenges. Rising costs, stringent licensing, and zoning regulations have made it increasingly difficult for clubs to operate and thrive.

"...The conditions that we've got now make it harder for clubs like Fabric to do what they do. Every year becomes more and more of a struggle..."

Community and Inclusivity

A standout feature of the electronic music scene is its ability to foster inclusivity and tolerance. Clubs like Fabric have become modern-day community centres, breaking down barriers and bringing together people from diverse backgrounds. Judy reflects on this, noting how electronic music venues have been instrumental in creating safe spaces for minority groups.

Education and the Next Generation

The future of the electronic music industry hinges on education and nurturing new talent. With a growing awareness of health and wellbeing, the younger generation's approach to nightlife is changing. There's a shift towards more mindful consumption, with clubs adapting to these new needs by offering varied amenities like chill-out rooms and healthier food options.

The Challenges Ahead

The electronic music scene faces several pressing challenges. From economic pressures like soaring DJ fees and operational costs to societal issues such as drug use and public perception, the industry is at a crossroads. There's a need

for more support from the government and industry bodies, not just in financial terms but also in recognition and policy support.

"...Our margins have gone down on one end, because costs have gone up. DJs in a world that isn't here anymore. And the agents and the managers of this industry need to take a long, hard look at themselves..."

The Path Forward

Looking ahead, the industry needs to focus on sustainable growth. This involves embracing the changing dynamics of clubbing, advocating for fairer policies, and ensuring that clubs continue to be spaces for creative and social convergence. As Judy and Andy highlight, the electronic music scene is not just about entertainment; it's about community, culture, and a shared human experience.

"... If you took a basic economics look, you'd realise the value of the economics that we bring in. But there's a lack of understanding of the importance that we do to create people's careers and also the communities we bring together..."

Conclusion: A Symphony of Change

The UK electronic music scene stands at a pivotal moment. Its impact on the economy, culture, and community is undeniable. However, for it to continue thriving, it requires recognition, support, and protection. The journey ahead is not just about sustaining a genre of music but preserving a vibrant cultural ecosystem that resonates across generations.

Reflection: We're still losing nightclubs. Fast

The latest figures offer a compelling narrative about the decline²⁰ of Great Britain's²¹ night-time economy, with the electronic music scene at the forefront of this downturn. In just the last year, from December 2022 to December 2023, the total number of late-night venues shrank from 102,071 to 99,113, a net loss of 2,958 venues and a 3% decline. Since Covid (from March 2020), 15,995 have been lost, a net 14% reduction. This reduction is more than just statistics; it symbolises the shrinking stages for electronic music and the dwindling spaces for cultural congregation.

Nightclubs, the heart of the electronic music ecosystem, have borne the brunt of this decline. With their numbers falling in the last year from 882 to 851, this 31 nightclub drop (4%) starkly highlights the threat. But the longer-term trend is much worse than the last year and than the nighttime economy overall: Since Covid (from March 2020), 396 have been lost, a brutal net 32% reduction. This severe contraction speaks volumes about the diminishing venues for artists to connect, perform, and share the vibrant beats of electronic music with their audiences.

The distress does not stop at nightclubs. Over the last two years, restaurants and casual dining venues, which occasionally double as platforms for electronic music, have seen their numbers dwindle significantly—restaurants from 16,878 to 14,968 and casual restaurants from 5,477 to 5,085, marking declines of 11.32% and 7.16%, respectively. Moreover, large venues, the bastions of electronic music festivals, have contracted from 4,559 to 4,240, a 7% decline, further underscoring the challenges facing the industry.

*“... Clubs are closing primarily due to the cost of living crisis.
People can't afford to go out anymore, and with energy bills and rents for clubs, it's not economical ...”
- Carl Loben, Editor-in-Chief, DJ Mag*

The data also reveals the impact on community-centric venues, with sports/social clubs and community pubs declining in the last two years by 7.52% (from 21,343 to 19,737) and 5.78% (from 19,126 to 18,021), respectively. This reduction in community venues hints at a broader issue affecting the social fabric and the grassroots support for emerging talent in the electronic music scene.

Despite a slight deceleration in the rate of decline from December 2022 to December 2023, the situation remains critical, especially for nightclubs. This sustained downturn signals a continued crisis for electronic music venues, underscoring the urgent need for targeted support and innovative solutions.

²⁰ This is a net decline and so it takes into account openings and closings. Data from CGA by NIQ & AlixPartners Hospitality Market Monitor

²¹ Great Britain refers to the island that consists of England, Scotland, and Wales, but excludes Northern Ireland which is considered part of the United Kingdom.

The story these numbers tell is not just one of decline but a call to action to safeguard the future of electronic music in the UK. It's a plea for intervention to revive these essential cultural spaces, to breathe life back into the night-time economy, and to ensure that electronic music continues to thrive as a key cultural and economic pillar in the UK. The data serves as a rallying cry for stakeholders to come together in support of the genre, advocating for the preservation and growth of these indispensable venues.

| | Sites at December 2021 | Sites at December 2022 | Sites at December 2023 | Dec. 2023 v Dec. 2022 | | Dec. 2023 v Dec. 2021 | |
|----------------------|------------------------|------------------------|------------------------|-----------------------|---------------|-----------------------|---------------|
| | | | | Number | Percent | Number | Percent |
| Sports / social club | 21,343 | 20,377 | 19,737 | -640 | -3.14% | -1,606 | -7.52% |
| Community pub | 19,126 | 18,382 | 18,021 | -361 | -1.96% | -1,105 | -5.78% |
| Restaurant | 16,878 | 15,630 | 14,968 | -662 | -4.24% | -1,910 | -11.32% |
| Food pub | 12,115 | 11,813 | 11,639 | -174 | -1.47% | -476 | -3.93% |
| Hotel | 7,525 | 7,328 | 7,232 | -96 | -1.31% | -293 | -3.89% |
| High street pub | 6,265 | 6,072 | 5,910 | -162 | -2.67% | -355 | -5.67% |
| Casual restaurant | 5,477 | 5,185 | 5,085 | -100 | -1.93% | -392 | -7.16% |
| Large venue | 4,559 | 4,525 | 4,240 | -285 | -6.30% | -319 | -7.00% |
| Bar | 4,507 | 4,455 | 4,363 | -92 | -2.07% | -144 | -3.20% |
| Bar restaurant | 3,372 | 3,283 | 3,221 | -62 | -1.89% | -151 | -4.48% |
| Nightclub | 1,035 | 882 | 851 | -31 | -3.51% | -184 | -17.78% |
| Total | 106,880 | 102,071 | 99,113 | -2,958 | -2.90% | -7,767 | -7.27% |

Data from GB (i.e. UK excl. Northern Ireland). Source: CGA by NIQ and Alix Partners Hospitality Market Monitor (December 2023)

This drastic loss is particularly problematic as there are fewer opportunities for new and emerging artists to showcase their talents and build a fanbase, which can negatively impact the electronic music culture and its development. Moreover, the loss of underground clubs means fewer opportunities for music enthusiasts to discover and experience new sounds and styles.

“... We need these venues to support upcoming acts, to help them grow to the point where they can be on the main stage.”
 - Sunil Sharpe, DJ and Artist

“... the UK has a terrible track record of protecting nightclubs from development or closure. Some of our nightclubs have been around for decades and are hugely important to the culture of our towns and cities. They need to be recognised as the institutions of cultural heritage that they are. Berlin has led the way on this, and we should follow suit ...”
 - David Selby, CEO, Resident Advisor

It will also have a significant impact on the communities that feel uniquely welcome in these spaces. Underground clubs often provide a safe and inclusive environment for marginalised communities, such as the LGBTQ+ community, people of colour, and other minority groups. These clubs may be one of the few spaces where these groups feel free to express themselves and enjoy music without fear of discrimination or harassment. Without these clubs, it can be more difficult for these communities to find a safe and welcoming space to enjoy music and socialise. Additionally, the loss of underground clubs can also mean a loss of diversity in the electronic music scene, as these clubs often provide a platform for underrepresented artists and communities to showcase their talents and connect with audiences. The loss of underground

clubs can not only affect the communities that feel welcome in these spaces, but it also limits the opportunity for people to discover new sounds and styles and to be exposed to new perspectives and experiences.

Case Study: Bristol

Bristol stands as a beacon of hope amidst a national trend of venue closures. Post-pandemic, the city not only retained its existing venues but also saw new ones emerge. This growth highlights the city's unique position in nurturing electronic music culture. Grassroots venues, particularly those with capacities under 300, were seen as crucial incubators for new sounds and cultural movements. These 'micro venues' are more than just entertainment spaces; they are breeding grounds for sonic communities and artistic experimentation. The nurturing of these venues was deemed essential for the evolution of both underground and mainstream electronic music. As such, Bristol has come up with an innovative solution for supporting grassroots venues.

Case study: Bristol's Grassroots Music Fund Initiative

The Bristol music scene has always been a hotbed of creativity and innovation. However, the resilience of this scene has been tested by national economic strains and evolving audience habits. Despite these challenges, Bristol stands unique, defying the national trend of music venue closures. This success story is a testament to the city's commitment to preserving and nurturing its rich musical heritage.

"... We need those incubation spaces, the sub 300 capacity venues. That's where new sounds, new scenes, and like new communities, that's where it gets created ..."

Bristol is proposing an innovative new funding model to support nighttime culture. The proposal is still in its early stages, but the music community in Bristol is positive about the idea and discussions are ongoing.

The Genesis of the Fund

Our journey began with a round table discussion at Bristol City Council, bringing together over seventy representatives from various sectors of the music industry. This diverse gathering, facilitated by Bristol's Night Time Economy Advisor, delved into the pressing issues facing our music scene. The outcome was the Bristol Grassroots Music Fund – an innovative, self-sustaining, and community-generated initiative.

The discussion highlighted several challenges:

- A decline in bar sales and changing audience preferences
- The dominance of big industry players stifling grassroots growth
- Lack of affordable event spaces and funding
- The impact of Brexit and technological advancements

The Fund's Vision and Principles

The aim is to create a fund that embodies Bristol's unique spirit – inclusive, fair, future-focused, and deeply rooted in our local culture. This fund is not just about financial aid; it's about empowering our music family, fostering talent, and preserving our cultural identity.

A Unique Funding Model

The crux of this initiative is a proposed ticket levy system. Imagine a minimal 1-3% levy added to music event tickets. This small addition, paid by the patrons, could potentially raise significant funds, redistributed via grants to support various aspects of our music ecosystem.

Addressing Potential Concerns

Introducing a new levy raised concerns. Increased ticket prices and the fair allocation of funds are legitimate worries. However, the approach is to ensure transparent governance and a balanced distribution that benefits all aspects of the music community.

The Power of Positive Thinking

Focusing on the positives, this fund could significantly boost local talent and reinforce Bristol's reputation as a music city. It's about fostering a strong bond between the industry and the city, enhancing our cultural ecosystem, and making arts more accessible to everyone.

Exploring Alternatives

While the ticket levy stands as the primary proposal, Bristol explored alternative funding avenues before settling on it. These include redirecting existing public funding, establishing investment funds, mixed funding models, and government incentives.

Next Steps: Realising the Vision

The path ahead involves securing commitments from public bodies, exploring the feasibility of the ticket levy system, and setting up a sector-representative working group. The aim is to integrate this initiative into the heart of Bristol's cultural strategy.

Conclusion: A Call to Action

The Bristol Grassroots Music Fund is more than just a financial mechanism; it's a movement to preserve and enrich our city's vibrant musical landscape. Bristol invites ideas, suggestions, and support in shaping this vision into a reality that resonates with every beat of Bristol's heart.

*For further information and collaboration opportunities,
please contact Carly Heath, Night Time Economy Advisor at Bristol City Council.*

Many nightclubs are evolving

There are several notable examples of nightclubs and electronic music venues in the UK that have embraced a broader role as community and cultural spaces. Partly driven by economic necessities as costs spiral and audiences expect more for less. Clubs have diversified their offerings to include a range of activities beyond traditional nightlife, serving as vibrant hubs for cultural and community engagement.

“... You can't get away with running a venue just two or three nights a week anymore. Venues need to be used in creative ways, maybe for community outreach or workshops ...”
- Duncan King, Head of Festivals & Partnerships, Skiddle

Nightclubs in the UK are increasingly involved in cultural and community activities beyond traditional nightlife:

Fabric, London

Fabric has become the world's first nightclub-in-residence at the Museum of London, engaging in performance commissions, festivals, and events. It also hosts industry insights workshops in collaboration with Saffron, covering topics like wellness and running a music label, aimed at women and gender non-conforming individuals. Furthermore, Fabric collaborated with Point Blank Music School for the "Music Futures" festival, and with the English National Opera to bring electronic music to the opera. It also introduced "Commune," a new daytime community gathering featuring art installations and guest DJ sets. Further, Fabric partnered with Rosie Hall's [The Rogue Room](#) on the Redemption Sessions, to bring together Rocket Vinyasa Yoga set to a backdrop of high-octane dance music.

Ministry of Sound, London

Ministry of Sound offers fitness classes, including dance programs, cardio, yoga, and Pilates. It also hosts various events such as sound therapy sessions and book launches, indicating its involvement in the entertainment and fitness industries. The Ministry of Sound Group has expanded into a worldwide events operation, fitness studio, and shared workspace.

Motion, Bristol

Versatile Venue: Motion is recognised for hosting a wide range of events, including live music performances, food festivals, and art exhibitions.

Invisible Wind Factory, Liverpool

The Invisible Wind Factory operates as a creative hub, combining music with theatrical performances, art installations, and community workshops. It features a performance venue, rehearsal space, workshop, artist studios, and more, serving as a platform for experimental music and art Invisible.

Sub Club, Glasgow

Sub Club, the longest-running underground dance club in the world, hosts various cultural events and community engagement activities through its Sub Hub brand. It's an integral part of Glasgow's cultural scene, offering diverse music and cultural experiences.

These examples illustrate the multifunctional role of nightclubs and electronic music venues in the UK, serving as vibrant hubs for cultural and community engagement beyond traditional nightlife.

Industry perspectives

- “... We didn't really get accepted as a cultural institution until the pandemic. We've been working with places like the Colosseum, St. Paul's Cathedral... but we're still not seen as a serious contender for culture, when we 100% are ...”
- Judy Griffith, Programming Director, Fabric London
- “... Clubs and music venues are not really any different, yet policymakers often don't view them in the same manner ...”
- David Martin, CEO, Featured Artists Coalition (FAC) and Board Member, Independent Venue Week
- “... Increasingly, past reports and guidance from the London Night Time Commission and GLA have called for London departments to, across the board, adopt the 'night test,' and look at every policy through the lens of, how does this impact life at night? ...”
- Diana Raiselis, Research Lead, VibeLab / Nighttime Researcher
- “... The government should make everything in the ecosystem easier to do. Run venues, apply for business funding, make it easier for artists from abroad to come here and perform ...”
- Elijah, Yellow Squares and Co-founder, Butterz Records
- “... The council and licensing struggle to understand the value of electronic music and dance music. It feels like we're constantly fighting a battle here. Without the council's support, it's like pushing a boulder uphill. It's frustrating. We're doing all this work, creating something special, and it's like we're invisible to the people who should care ...”
- Levi de Belgeonne, Events Manager and Brand Consultant (Norwich, Norfolk)
- “... Headline electronic bookable artists are finding it easier to perform in Europe or the US... we are losing some of that headline talent, due to global competition and Brexit impact. ...”
- Nick Morgan, CEO, We Group UK
- “... The UK's agents of change legislation is a critical planning policy... a real positive attitude towards electronic music.”
- Sunil Sharpe, DJ and Artist

I.4. Adding it up: The total economic contributions of electronic music

In total, across nightclubs, festivals and concerts, we estimate that there were 97 million nights out based on electronic music in the UK in the last 12 months. (This excludes bars, cafes and restaurants that play it, of course, which would make the true numbers even higher).²²

| Number of nights out | 2022 | 2023 | Percentage change |
|----------------------|---------------|--------------|-------------------|
| Festivals | 2.5m | 2.7m | 7% |
| Nightclubs | 98.6m | 90.0m | -9% |
| Other live | 4.4m | 4.5m | 3% |
| Total | 105.4m | 97.2m | -8% |

Adding it all up, the measurable impact of electronic music on the UK across recorded music, nightclubs, festivals and concerts is £2.5b.²³

| | 2022 | 2023 | Percentage change |
|------------------------------|------------------|------------------|-------------------|
| Recorded music total | £182.2m | £210.6m | 16% |
| Nightclubs total | £1,699.0m | £1,457.3m | -14% |
| Festivals total | £519.3m | £567.8m | 9% |
| Other live total | £272.3m | £285.5m | 5% |
| Total economic impact | £2,672.8m | £2,521.2m | -6% |

²² Source: Audience Strategies analysis of data from various sources including CGA by NIQ, ONS, REKOM and others.

²³ Source: Audience Strategies analysis of data from various sources including CGA by NIQ, ONS, REKOM, LIVE, IFPI, BPI, Viberate, Chartmetric and more. See individual chapters of this report for a more detailed explanation of each data point.

“... Electronic music is an ever-evolving artform, free from boundaries. At its best, it attracts creators at the peak of their powers who harness the latest technologies to deliver sounds and experiences previously unimagined. It is an unending labyrinth of innovative venues, sub-genres, sound systems, shared experiences, communities, tribes and sub-tribes where anyone can find their space on a dance floor that is right for them. Something a bit special, basically.

This report shines a light on a deeply interconnected electronic music ecosystem. Showing the strength and depth of value, but equally, highlighting where fragility exists and where support and innovative solutions are required to ensure a sustainable future ...”

- Greg Marshall,
Electronic Music Industry Consultant, DJ
and former CEO of the Association for Electronic Music

2. Electronic music education ²⁴

This section on electronic music education explores the dynamic changes and developments within the UK's educational landscape concerning electronic music. It highlights the innovative approaches and initiatives aimed at integrating electronic music into the broader educational system, showcasing examples such as the Lisa Lashes School of Music and partnerships with technology companies like Ableton. The section delves into the challenges faced by educational institutions in incorporating electronic music, including funding, technological reluctance, and equipment inadequacies. It also discusses the potential for music venues to serve dual roles as educational and community spaces.

Electronic music education is undergoing a significant transformation. This brings both opportunities and challenges. At the core of both is the integration of electronic music into the education system, reflecting its significance within the broader music industry and culture more broadly.

Electronic music education in the UK is in an exciting and impactful phase, marked by innovative initiatives and passionate involvement from industry professionals. One such example is the Lisa Lashes School of Music, which offers free music education to children at risk of exclusion, emphasising DJ skills, event management, and social media, filling a gap in traditional education. One of its collaborations with Northamptonshire police through the Community Initiative to Reduce Violence (CIRV) demonstrates a unique, community-focused educational approach.

“... I've never charged any money for our pupils and students to come in ... because I firmly believe that music education should be accessible to all ...”
- Lisa Rose-Wyatt (AKA Lisa Lashes), International DJ & Producer,
Founder of the Lisa Lashes School of Music

Additionally, programs like Toolroom Academy offer specialised courses in genres like house and techno, led by industry professionals. These include a distinctive BA (Hons) in Electronic Music and Business. Similarly, the University of Central Lancashire's Music Industry Management & Promotion Master's degree provides industry-relevant education, preparing students for diverse roles in the music industry and fostering creativity, critical thinking, and collaboration.

Music services such as Surrey Arts, Kent Music, Richmond Music Trust, and Lancashire Music Service play a vital role in shaping music education in primary and secondary schools. They help bridge the gap between traditional education frameworks and contemporary music trends. Collaborating with industry players is crucial to providing the necessary resources and expertise for educational settings. These hubs provide access to music technology for both teachers and students. Partnerships between music services and technology companies, like the collaboration between Lancashire Music Service and Ableton, are an excellent way to modernise music education in schools.

“... We've got a great collaboration with Ableton ... We're supporting all secondary and specialist schools in Lancashire with access to Ableton Push 2 and Live Intro DAW licences, currently 65 of 82 secondary schools have accessed this opportunity and support ...”
- Ben Rapp, Regional Manager, Lancashire Music Service & Lancashire County Council

²⁴ Note: We have not attempted to calculate the economic impact of music education in this year's report.

“The National Plan of Music Education” outlines five strategic functions for Music Hubs, including Partnerships, Schools, Progression and Musical Development, Inclusion, and Sustainability. In fact, starting in September 2023, Music Hubs will be required to develop a “Local Plan for Music Education” to explain how they will work with partners to design and deliver these aims and strategic functions.

The Current State and Challenges

Despite these efforts, challenges still persist, especially in primary education, where the integration of electronic music largely depends on individual teachers' expertise. The situation in secondary schools is also problematic due to a lack of essential technology, such as digital audio workstations, that are crucial for effective teaching in this genre. This patchy integration highlights the need for a more structured approach to electronic music education.

The main challenges hindering the full integration of electronic music into the UK's educational system are the lack of funding, a disconnect between the music industry and educational systems, insufficient awareness about career opportunities within the industry, disinterest in embracing technology, and limited resources.

Other challenges include:

Funding & Resource Limitations: The requirement for specialised equipment and software often encounters budgetary constraints, rendering it difficult for schools to provide uniformity in music education. Hence, the lack of funding and resources allocated to electronic music education is a significant challenge. Here is a viewpoint on how the government prioritises funding.

*"The government doesn't place enough importance on creative education and doesn't understand its impact."
- Lisa Rose-Wyatt (AKA Lisa Lashes), International DJ & Producer,
Founder of the Lisa Lashes School of Music*

Industry-Education Disconnect: The disconnect between the rapidly evolving music industry and the comparatively static educational system has led to many students not being fully exposed to the latest trends and career opportunities in the industry. Consequently, students miss out on valuable insight and experience that the industry could offer them.

*"... We are doing a disservice to our pupils if we don't teach them how to use a digital audio workstation and how to record themselves and create music using this software ..."
- Ben Rapp, Regional Manager at Lancashire Music Service & Lancashire County Council*

Technological Reluctance: Educators from traditional backgrounds exhibit a noticeable resistance to adopting music technology and electronic music teaching methods, which have hindered the effective implementation of these technologies in the classroom.

Lack of Adequate Equipment: Many schools do not possess adequate equipment, including essential gear such as laptops and software necessary for teaching electronic music production. This lack of equipment further heightens the difficulties of integrating electronic music into the classroom, preventing students from gaining the necessary skills and knowledge required to pursue a career in the music industry.

"...The things that make it challenging to deliver education consistently are that equipment often is expensive, and it is difficult to keep up with the models that change, and things get damaged. These are general challenges of running a high-tech education centre..."

Samantha Nelson, founder of Hub16 Studios and DJ

Initiatives Shaping the Future

Yet, it's not just about integrating technology into the curriculum.

There is a vision of expanding the role of music venues, as Lisa Rose-Wyatt (aka Lisa Lashes) suggests, to double as educational and community-inclusive spaces. Programs like the Bronze Arts Award, endorsed by Trinity College, do this by leveraging club spaces for alternative education and youth engagement. This approach not only broadens the scope of electronic music education but also champions inclusivity and community engagement.

The path towards inclusive and comprehensive electronic music education also involves a critical choice, as pointed out by Miles Shackleton, co-founder of Toolroom Academy. Aspirants of the genre are presented with a dilemma: pursuing formal degrees versus specialised, industry-relevant courses. "It's a choice between formal education, much higher price point, or shorter online courses, through specialist providers," Miles explains, highlighting the shift towards more specialised education providers, like Toolroom Academy, which offers education from professionals who have seen real success in their careers.

"... My message to industry and government is that to champion music education is to invest in our creative economy and rail against the banal. This investment nurtures talent and divines value. Real, exportable, economic and intellectual value that helps us to progress as a global society and to create tangible wealth. BIMM's devoted AI Labs module, which is available to all students and staff or our collaboration with DAACI are just two examples of how seriously we take our responsibility as educators to prepare the next generation of electronic music changemakers ..."

- David Rowe, Pro Vice Chancellor (Music), BIMM University

The potential impact of widening the scope to cater to young adults is immense. It acknowledges that music education doesn't stop at a certain age. Such an expansion could provide more opportunities for advanced learning, mentoring, and professional development, bridging the gap between education and industry even further. Moreover, expanding music education to include electronic music broadens its appeal, attracting students who might not have engaged with traditional music programs.

"... Music services and hubs are key to the talent pipeline.

If policies allow, and what they're doing is relevant to the kids, we potentially have a great creative future. ..."

- Tony Rigg, MA Programme Co-Founder & Researcher, University of Central Lancashire.

What we heard

For this report, we spoke to a number of people involved in electronic music education. Here's more of what we heard.

"... We work with around 500 students a year closely on our mentoring programs...We've achieved hundreds of label signings in the last five years, to labels such as Toolroom, major labels like Universal, and then many different underground independent labels ..."

- Miles Shackleton, COO Toolroom and Co-founder Toolroom Academy

"... We identified an historic lack of focus in education provision on how to convert music related creativity into sustainable careers. So we set up a postgraduate course in Music Industry Management with the aim of bridging this gap..."

- Tony Rigg, MA Programme Co-Founder & Researcher, University of Central Lancashire.

"... I think of fabric as a place of education now, a place like a modern-day Community Center; where you go to meet like-minded people...the knock-on effect of that is huge creativity in the community ..."

- Judy Griffith, Programming Director, Fabric London

Case study: Toolroom Academy

We spoke to Miles Shackleton, COO of Toolroom and Co-founder of Toolroom Academy, to hear more about their impact on electronic music education.

Case Study: Toolroom Academy on The Evolution of Electronic Music Education in the UK

The Current Education Landscape

The current landscape of electronic music education in the UK presents a significant choice for aspiring artists and producers: the decision between formal education at a degree level or opting for shorter, more focused courses offered by individual experts and specialist providers. While formal education offers accredited qualifications and a broader understanding of the music business, shorter courses provide specific, genre-focused learning directly from current industry professionals.

"...I think what you're seeing is a greater choice, and a move towards more specialist providers, offering education from people that have actually seen real success in their careers..."
- Miles Shackleton, COO Toolroom and Co-founder Toolroom Academy

The Growth of Specialised Education and Industry Participation

The trend towards creating more specialised educational content has resulted in better outcomes for students. This shift has been further accelerated by the COVID-19 pandemic, which has prompted many current professionals to turn to education as a way to earn income. Shackleton has observed a noticeable shift towards professionals who have achieved real success in their careers turning to education, as opposed to a past trend where educators in this field might not have had practical industry experience. This enhances the diversity and relevance of content available to students. Toolroom Academy, as an example, is a pioneer in this space, offering genre-specific education aligned with undergraduate-level standards in collaboration with degree-awarding institutions. This approach provides students with the best of both worlds: highly relevant, specialised training combined with the recognition of formal education.

"...COVID really was a tipping point for [professionals] to get involved in electronic music education for the first time, offering a vital income stream at a perilous time for the industry..."
- Miles Shackleton, COO Toolroom and Co-founder Toolroom Academy

Balancing Formalisation and Specialisation

One of the core challenges in electronic music education is balancing the desire for traditional, degree-level education with the need for specific, genre-focused training. Formal education, often offered by higher education institutions, provides accredited qualifications and a comprehensive understanding of the broader music business. These programs tend to be more generalist, catering to a wider range of musical interests. The appeal here is the credibility and broad scope of learning, coupled with a recognised qualification. On the flip side, Shackleton notes the burgeoning trend of specialised courses. These are typically shorter, intensely focused, and often taught by current industry professionals who have achieved success in their fields. Such courses offer hyper-relevant content tailored to specific genres. This approach resonates with students seeking practical, industry-aligned skills and knowledge, bypassing the generalist approach of formal education. Toolroom Academy's pioneering role in this shift is significant. They exemplify how a record label can diversify into an educational entity, offering genre-specific education aligned with academic standards. Their collaboration with WaterBear to offer a BA Honors course is a testament to the increasing acceptance and integration of electronic music within academic frameworks.

"...It's a choice between formal education at much higher price points, or shorter online courses, through specialist providers, which don't have formal accreditation, but maybe are more relevant to your interest..."
- Miles Shackleton, COO Toolroom and Co-founder Toolroom Academy

Success Stories

Toolroom Academy has seen remarkable success, working with around 500 students yearly on mentoring programs through programs that blend interactive elements with on-demand learning. These students are not only from economically strong countries but also represent a diverse range of backgrounds. Success stories like artist ESSEL, who, from a participant in Toolroom's diversity platform, 'We Are Listening,' aimed at amplifying female-identifying talent in electronic music to becoming a top-selling artist on the label, encapsulates the transformative potential of targeted education and mentorship. The Academy's approach is genre-specific, concentrating on house, techno, and tech-house, offering a tailored educational experience that equips students with the skills needed for label readiness. This specificity has led to numerous label signings, including major labels like Universal, reflecting the direct correlation between specialised training and industry success.

"...ESSEL was our top-selling artist on the label in 2023. She's streaming millions... and she's gigging internationally as well..."
- Miles Shackleton, COO Toolroom and Co-founder Toolroom Academy

Critical Issues: Access and Representation

There are several challenges to overcome, particularly in terms of providing education to students from different economic backgrounds and gender inequality in participation. Shackleton points out that although electronic music has made production more accessible, many people in less affluent areas still face barriers due to a lack of access to technology and software. Additionally, there is a need for more female producers and engineers in the industry. Therefore, access and diversity remain critical issues. To support this change, Toolroom Academy has made diversity and inclusion a central part of its ethos. The Academy recognises the gender gap in music production and engineering and is actively working to address it. Its initiatives include offering scholarships to female-identifying artists and creating opportunities for underrepresented groups in the industry, which are significant steps towards a more inclusive electronic music landscape.

"...Our pricing model... Our students generally come from English-speaking countries with strong economies... I'd love to create educational provision for developing territories. And our students are still 85% male. So, that's a big thing that I want to work on..."
- Miles Shackleton, COO of Toolroom and Co-founder of Toolroom Academy

Economic and Cultural Impact

Economically, the electronic music industry in the UK has evolved from its nascent club culture origins to a robust, professional sector contributing significantly to the national economy. Toolroom Academy alone employs nine people, reflecting a broader trend where electronic music businesses provide stable, rewarding careers, contributing to local economies and national tax revenues. This shift from underground scenes to structured industries signifies electronic music's growth into a respected and valued sector, offering diverse career opportunities beyond performing artists, including technical, marketing, and managerial roles. The cultural impact of electronic music in the UK is significant.

Shackleton shares that electronic music and club culture offer spaces for self-expression and freedom, fostering a sense of belonging and community. This cultural significance is not just confined to nightclubs but extends to education, where institutions like Toolroom Academy are breaking new ground. Moreover, this industry has been at the forefront of promoting inclusivity and diversity, challenging norms, and providing a voice to marginalised communities. Through initiatives like 'We Are Listening', Toolroom Academy actively works to address gender disparities in the industry, offering scholarships and mentorship to female and non-binary artists.

Conclusion: A Future-Focused Industry

The UK electronic music scene is at a pivotal point, with education playing a crucial role in shaping its future. By balancing formal education with specialised training, addressing access and representation challenges, and continuing to foster a culture of inclusivity and innovation, the industry is poised for continued growth and success. The case of Toolroom Academy illustrates the power of targeted, professional education in nurturing talent and driving the industry forward.

3. Electronic Music Audiences

For this year's report, we're deep-diving into the audiences that make up the electronic music scene. This chapter unveils the vibrant world of the UK's electronic music audiences, providing a comprehensive look into who they are and what makes them tick. Starting with an overview of the 6.7 million fans across the country, we'll explore insights from industry insiders, revealing how electronic music bridges generations and cultures. Through a detailed survey, we delve into the emotional and cultural impact of the genre, highlighting its role in community building and personal well-being. We also measure the digital demand for electronic music, showcasing the genre's broad appeal and the global prominence of UK artists. Finally, we segment the audience into eight distinct groups, illustrating the diversity and universal connection electronic music fosters. Expect to discover the depth and breadth of electronic music's influence in the UK, addressing challenges and celebrating its unifying power.

3.1. What We Heard from the Industry

This section on "What We Heard from the Industry" offers a detailed exploration of the electronic music scene through the perspectives of various stakeholders. It paints a picture of a genre that transcends age, with both young and older generations finding common ground in electronic music. It highlights the importance of major UK cities like London, Manchester, Bristol, and Glasgow as hubs of electronic music culture, innovation, and experimentation. The shift towards gender diversity and the inclusion of a wide range of socioeconomic backgrounds within the fanbase and artist community are noted, reflecting the genre's broad appeal and its role in fostering inclusivity. Additionally, the impact of social media, changing consumer behaviours towards premium experiences, and the financial challenges facing nightclubs due to changing spending patterns are discussed. This section provides insight into the evolving dynamics of electronic music, emphasising its cultural significance and the challenges and opportunities it faces.

Electronic music appeals to a wide range of different age groups. From teenagers who are just discovering dance culture to individuals in their 40s and 50s looking for a nostalgic connection, it resonates with a wide spectrum of people. Samantha Nelson, Founder of Hub16 Studios and DJ, eloquently captures this sentiment, noting how electronic music creates a singular space where various generations can converge, sharing experiences and musical influences that transcend age.

Geographically, London, Manchester, Bristol, and Glasgow are the major cities that play a pivotal role in shaping the UK's electronic music scene. Each of these hubs contributes uniquely to the genre's evolution, fosters a vibrant club culture and hosts festivals that have become popular worldwide. These urban centres are the breeding grounds for innovation and experimentation in electronic sound.

The industry has seen a noticeable shift towards gender diversity and inclusion. Traditionally a male-dominated space, particularly in terms of DJs and producers, there's a growing momentum toward including diverse perspectives and voices. Initiatives and collectives supporting women, non-binary, and LGBTQ+ artists are gaining ground, cultivating a more inclusive electronic music community. Jack Henry, Operations Director at EI, acknowledges that this shift underscores the significance of these efforts. By elevating diverse voices, the industry is not just enhancing its vibrancy but is also setting a precedent for inclusivity and equality.

The socioeconomic backgrounds of artists and fans are as varied as the sub-genres within electronic music itself. Different sub-genres attract distinct groups based on their style, audience, and cultural background. House and Techno have a diverse fanbase, including professionals and students, while Drum and Bass and Dubstep often appeal to a younger demographic. Trance draws a broad audience and has a strong following among festival-goers. Garage music is popular among urban youth due to its strong connection to dance and urban street culture. This diversity highlights the genre's ability to cross social and economic boundaries. As Rob Searle, Head of Entertainment & Music, REKOM Group, points out, electronic music

serves as a bridge connecting individuals from disparate backgrounds through their shared love for music. This aspect of electronic music not only enriches its community but also underscores the genre's reach and accessibility.

More recently, the entry of younger audiences has been influenced by social media and contemporary trends. These shifts in their behaviour and engagement patterns are reshaping the landscape of electronic music. A notable trend among 18 to 24-year-olds is their transition towards attending fewer events but opting for more premium experiences when they do. This 'premiumisation' indicates an increased emphasis on quality. There has been a decline in revenue due to changes in consumer behaviour. People are still interested in going out, but they're spending less at the bar, which impacts the club's profits. Traditionally, nightclubs don't make much profit from ticket sales alone, as these primarily cover operational costs. The main revenue comes from bar sales. The trend of patrons spending less on drinks presents a financial challenge for clubs, which rely on these sales to cover their expenses and make a profit.

"... We never make money on tickets. The door helps to cover our expenses but doesn't really make much of a profit; it gets people in the door, and we mainly rely on people coming in and spending money at the bar. At the moment, people are coming out but not drinking. It's genuinely dangerous ..."
- Stuart Glen, Co-founder and MD, The Cause

"... As much as I love student events, they are becoming very difficult at the moment. I think for a brand such as Groovin' that's trying to put on big productions with big headliners, there's tough competition as the market seems to be saturated. There are lots of options, meaning you can't charge a premium price because people can go elsewhere. And it does seem like the students are going out less and less at the moment, which is the other aspect."
- Archie Clark, prompter at Groovin'

It is worth noting that the pandemic created a gap, particularly for the 18-21 age group, who missed out on the traditional initiation into clubbing that usually happens during the late teen years. To address this, promoters like Pete Jordan, Director / Founder of Weird Science & MADE Festival, have innovated by creating 16+ nights, which aim to engage younger audiences (aged 16-18) and provide them with an introduction to clubbing.

"... You've got three years' worth of cohorts of young people that just haven't had the exposure to the night-time economy going out listening to electronic music, evolving their tastes in music and finding new friends who are also into particular types of music. And the Students Union, we have to justify why our footfall and our revenue are looking quite different to previous years. And actually, that's one of the key things that we seem to be picking on at the moment. ..."
- James Slater, Venues & Operations Manager, Nottingham Trent Students' Union & The Level

Another development is the emergence of events catering to the over-40 demographic, as pointed out by Duncan King, Head of Festivals & Partnerships, Skiddle. This group, now free from parenting duties, is spending three times more per head than their younger counterparts, seeking quality and unwilling to settle for mediocre experiences. This trend again underscores the theme of premiumisation across different age groups.

"... The beauty and the power of daytime or early evening raves... now you can go out during the day or during the evening. I love the fact that a lot of people from our demographic still want to go out, they still want to have some fun ..."
- Brandon Block, Motivational Thought Coach at HappyDaysforeveryone and DJ

3.2. Electronic Pulse. Our survey of Dance Music's Engagement, Culture, and Connections

This section on "Electronic Pulse: Our survey of Dance Music's Engagement, Culture, and Connections" presents a comprehensive analysis of the UK's electronic music scene through a survey conducted with fans. It explores how individuals engage with electronic music, the evolving landscape of clubbing and festival attendance, and the profound cultural and community connections fostered by the genre. The findings reveal a significant daily engagement with electronic music across age groups, a nuanced shift in clubbing behaviours, and the transformative power of electronic music on emotional and mental health. Additionally, the report delves into the safety and satisfaction levels of clubgoers, underscoring the electronic music scene's role as a catalyst for diversity, inclusivity, and community building. Through personal testimonials and statistical data, this section offers an in-depth look at the electronic music community's vibrancy, challenges, and the pivotal role of live events in enriching attendees' lives.



We conducted our first annual Electronic Pulse survey with UK fans of electronic music in January 2024 to understand their behaviour when it comes to music and their experience of the electronic music scene. And to hear, in their own words what the scene means to them and what impact it has had on their life.²⁵

²⁵ Source: NTIA x Audience Strategies: Electronic Pulse survey of 359 UK electronic music fans in January 2024

Engagement

Overall, a staggering 80% of respondents listen to electronic music on a daily basis. Even among respondents aged 45 and over, 75% listen to electronic music on a daily basis.

When it comes to clubbing, not surprisingly, it is the younger fans at the higher end of engagement, with 43% of 16-34-year-old electronic music fans clubbing on a weekly basis, compared with 24% of the fans as a whole. However, that's not to count out the older audience. 41% of electronic music fans aged 45 and over say they go clubbing at least once a month!

Overall, 24% of electronic music fans say their clubbing frequency has increased over the past year, but 35% say it has decreased. Among the younger fans aged 16-34, the trend is towards an increase in clubbing. 40% of those under 34 say their clubbing frequency has increased in the past year compared with 28% that say it has decreased.

Deep Dive: The Evolving Landscape of UK's Electronic Music Scene²⁶

The recent survey conducted amongst UK fans of electronic music reveals a nuanced shift in the clubbing landscape, reflecting broader societal and personal changes. These shifts not only highlight changing preferences and priorities but also pose significant implications for the electronic music industry.

Changing Social Dynamics and Economic Pressures

A notable 46% of respondents attribute their decreased frequency of clubbing to changes in their social lives, such as different friends or relationship status changes. This indicates a fluid social environment where electronic music venues might need to adapt to cater to varying social groups and relationship statuses. Economic considerations also play a crucial role, with 37% watching their spending more closely, hinting at the cost of living's impact on leisure choices. The sentiment "too expensive!" echoes across several responses, underscoring the financial constraints faced by many fans.

Lifestyle Priorities and Health Considerations

Lifestyle changes, including work or study commitments and health-focused shifts, account for significant portions of the decline in clubbing. Thirty-nine percent report that busier lives leave little room for night outs, while 17% have prioritised their health, which they feel is at odds with clubbing. The sentiment, "I've been focusing more on my health, and clubbing doesn't fit with that," underscores the growing importance of wellness in leisure choices. Additionally, the mention of parenting responsibilities, "I'm a parent!" and "Kids!!!" underlines the natural progression away from nightlife as personal priorities shift.

Spatial and Experiential Changes

The survey highlights a geographical shift, with 24% noting the reduction of nightclubs in their vicinity and 15% moving to areas with limited clubbing options. These changes suggest a need for the industry to address the accessibility and distribution of venues across regions. Moreover, dissatisfaction with the current club scene is evident, with 17% pointing out that recent club experiences haven't lived up to expectations and others noting a lack of diversity in music genres available, particularly in cities like Manchester.

Ageing Demographic and Digital Alternatives

The ageing demographic of clubbers, coupled with the advent of digital alternatives, presents both challenges and opportunities for the industry. Remarks such as "I'm old, and it hurts now" and "Feel a bit old at a club, doesn't apply at a festival" highlight the need for inclusive events that cater to older audiences. Meanwhile, the minimal but noteworthy 2%

²⁶ Source: NTIA x Audience Strategies: Electronic Pulse survey of 359 UK electronic music fans in January 2024

who prefer online streaming platforms like Boiler Room indicate a growing niche that the industry could further explore and integrate with traditional clubbing experiences.

Implications for the Industry

These findings suggest that the electronic music industry must evolve to remain relevant and engaging for its audience. This evolution could involve diversifying music offerings to cater to a broader range of tastes, creating more inclusive and varied event formats that appeal to older demographics or those with health and wellness in mind, and addressing economic barriers to access. Moreover, enhancing the clubbing experience to meet heightened expectations and exploring synergies between online and offline music experiences could help rejuvenate the UK's electronic music scene.

In conclusion, the electronic music industry stands at a crossroads, with significant opportunities to adapt to the changing landscape of its audience's needs and preferences. By addressing these underlying shifts, the industry can ensure its long-term vibrancy and relevance, fostering a more inclusive, diverse, and engaging electronic music community.

Festivals offer another way to engage with electronic music in a social environment and are particularly popular with female fans and older fans, 65% of the electronic music fans aged 45 and over attended an electronic music festival in the past 12 months, as had 84% of female fans (compared with 76% of male fans).

The benefits of attending Dance / Electronic Music events and nightclubs?

Just behind being introduced to new music (84% of fans), a remarkable 80% of the electronic music fans surveyed felt they had experienced emotional and mental health benefits from dancing at dance / electronic music events and nightclubs. This was true for men and women and across all age groups. Feeling part of a community and improved mental well-being were benefits enjoyed by a similar proportion of people.

Deep Dive: The Transformative Power of Electronic Music²⁷

Resonating Beyond the Beat

The profound connection between electronic music enthusiasts and the dance floor culture is unmistakable, transcending mere entertainment to touch on deeper, more personal aspects of life. With 84% of respondents discovering new music through dance/electronic events, it's clear these gatherings are pivotal in shaping musical tastes and expanding horizons. "It's just wonderful to see artists play live, engaging with the crowd and getting wrapped up in these experiences," one respondent shared, highlighting the transformative power of live performances.

Emotional and Community Wellbeing

The survey reveals that 80% of participants find emotional and mental health benefits in dancing, and 75% feel part of a community, illustrating the dance floor as a sanctuary of solace and belonging. "Dance/Electronic Music events & nightclubs definitely saved me...It's like putting me back in touch with myself," one attendee reflected, emphasising the therapeutic and rejuvenating essence of these experiences. This collective sentiment showcases how electronic music events serve as pivotal platforms for emotional expression and mental health support.

A Catalyst for Creativity and Identity

²⁷ Source: NTIA x Audience Strategies: Electronic Pulse survey of 359 UK electronic music fans in January 2024

Beyond the beats, 67% of fans report improved mental wellbeing, and 64% have made new friends, underscoring the role of electronic music in fostering social connections and enhancing personal growth. The expressive freedom found in these environments allows for a unique form of self-discovery and expression. "Dancing is almost like a meditation to me...it's cathartic, connected to people, good for your soul and way better than Prozac or similar!" illustrates the deeply personal impact these events have on individuals' lives.

Fashion, Art, and Personal Growth

The influence of electronic music extends into personal interests and lifestyle choices, with 49% feeling encouraged in their artistic pursuits and an equal percentage noting an impact on their fashion style. These findings reflect the scene's role in shaping identities and inspiring personal and artistic development. "Clubbing led me to the career I'm in now (promoting). I've developed many new musical interests and friendships through clubbing over the years," shares a respondent, revealing the profound and multifaceted influence of electronic music culture.

Challenges and Opportunities for the Industry

The data not only underscores the significant cultural and economic impact of the electronic music scene but also highlights the challenges it faces, such as venue support, artist funding, and education to bridge talent gaps. The collective voice of the survey respondents, echoing sentiments of community, healing, and creativity, serves as a powerful testament to the intrinsic value of electronic music. As the industry looks forward, harnessing this passion and addressing the underlying challenges will be key to nurturing the growth and sustainability of this vibrant cultural force. The report, through its exploration of the tangible and intangible benefits of electronic music, positions the genre as a critical pillar of cultural and economic development within the UK, advocating for a strategic approach to ensure its flourishing future.

Appendix: A deep-dive into the open-ended responses to this question

The open-ended responses from the survey provide a rich tapestry of personal experiences and narratives that vividly illustrate the profound impact of electronic music and nightlife on individuals. These accounts serve not only to humanize the data but also to underline the multifaceted benefits of electronic music events, from fostering community to inspiring creativity and offering solace and escape from the stresses of daily life.

Music as a Gateway to Creativity and Community

Many respondents shared how electronic music events introduced them to new sounds and inspired their own creative journeys. One individual recounted, "From first starting clubbing took me to many places I would never have gone, I heard so many great tunes, it influenced me to become a DJ / producer." This encapsulates the role of electronic music in sparking creativity, pushing boundaries, and opening up new horizons for attendees.

Another respondent's experience highlights the community aspect: "Electronic music helped me to find my chosen family when previously I had felt isolated in my teens." The sense of finding a "tribe" or chosen family through shared musical experiences is a recurring theme, emphasizing the community-building power of electronic music events.

Emotional and Mental Well-being

The emotional and mental health benefits of attending electronic music events were a prominent theme. One poignant response was, "Dance/Electronic Music events & nightclubs definitely saved me. They've always been a place where I can leave my troubles behind, connect with people & enjoy the music." This sentiment echoes across many responses, with attendees finding solace and escape, as well as a space for healing and emotional release on the dance floor.

Another respondent shared, "It's like meditation," suggesting the transcendental experience that dancing and immersion in music can provide, acting as a form of mental and emotional therapy.

Discovering Identity and Freedom

Expressing one's identity and finding freedom through electronic music was another significant theme. "Expressing my identity" and "Encouraging my artistic interests" were benefits that attendees experienced, illustrating the inclusive nature

of electronic music culture that allows for personal and artistic expression. "I feel free, I feel alive and I feel part of something important," one respondent articulated, capturing the liberating effect of dance music and its ability to foster a sense of belonging and acceptance.

Social Connections and Lifelong Memories

The social aspect of electronic music events was vividly brought to life by the respondents. Stories of making new friends and even finding life partners were common, with one individual noting, "So many friends have been made on the dancefloor. It connects so many people & there's so many friendships that've come from these experiences." Another shared, "My entire friendship circle has come from meeting friends on the dance floor," highlighting the role of these events in creating lasting social bonds and memories.

Impact on Lifestyle and Career Choices

Several responses illustrated how electronic music has influenced lifestyle and career choices, with one stating, "Clubbing led me to the career I'm in now (promoting)." This underlines the broader impact of the electronic music scene on individuals' trajectories, inspiring not just creativity but also professional paths within and related to the music industry.

Inspiring Action and Advocacy

The narratives also reveal a passionate call to action to support and preserve electronic music culture. Respondents expressed concerns over the challenges facing the scene, such as venue closures and licensing issues, and highlighted the importance of advocacy and support for the music and venues they love.

In conclusion, the open-ended responses from the survey paint a vivid picture of the transformative impact of electronic music events on individuals' lives. They highlight the importance of these events in inspiring creativity, fostering community and belonging, providing emotional and mental health benefits, facilitating social connections, and influencing personal and professional development. These narratives underscore the need for continued support and recognition of electronic music as a valuable and vital part of cultural life, with implications for policymakers, industry stakeholders, and the wider public to ensure its thriving future.

Quotes from interviewees:

- "... Electronic music helped me to find my chosen family when previously I had felt isolated in my teens ..."*
- "... Dance music and clubs have always played an essential role in the LGBTQ+ community; providing a safe, welcoming and uplifting environment in which to gather and thrive ..."*
- "... Music can unite a cross-section of our communities through the shared joy of a musical genre. They help to break down some of the barriers that exist, whether that is race or creed, through the joy of a shared, common interest ..."*
- "... From first starting clubbing took me to many places I would never have gone, I heard so many great tunes, it influenced me to become a DJ / producer ..."*
- "... Following my introduction to clubbing, I set up my own club nights which helped me learn how to run a business, contributed to the local economy and helped me network. To this day, I still work in the creative & music industries as an account director ..."*
- "... Dance/Electronic Music events & nightclubs definitely saved me. They've always been a place where I can leave my troubles behind, connect with people & enjoy the music ..."*
- "... Dancing is almost like a meditation to me. It's cathartic, connected to people, good for your soul and way better than Prozac or similar! we should never, never stop dancing - no matter how old, how skint and how challenging life gets! ..."*
- "... Attending Dance/Electronic music events has benefited my life in quite a few different ways. Predominantly when I was younger. Nightclub events were my gateway to meeting like-minded friends and listening to electronic music I liked on a big system ..."*

How did they first get involved?

65% of UK electronic music fans are drawn into the genre through social connections and gatherings, reflecting its community-driven nature. Live events are a key entry point for 42%, showcasing the importance of music festivals and iconic venues in engaging fans. Media channels, including radio and online platforms, introduce the genre to 34% of the audience, underscoring its broad reach. Additionally, 16% discover electronic music through diverse, often grassroots routes like family, magazines, and underground raves.

The findings suggest industry strategies should focus on community engagement, leveraging live events, and utilising varied media for outreach, while preserving the scene's unique cultural roots.

In essence, the UK's electronic music scene is a rich blend of social connections, cultural moments, and diverse entry points, highlighting its significant role beyond economic impact, and necessitating continued support for its growth and global influence.

Deep Dive: The Evolution and Cultural Tapestry of the UK's Electronic Music Scene²⁸

²⁸ Source: NTIA x Audience Strategies: Electronic Pulse survey of 359 UK electronic music fans in January 2024

The survey data from January 2024 provides a fascinating insight into the diverse pathways through which UK fans engage with the electronic music scene, offering a mosaic of experiences that underline the genre's broad appeal and deep-rooted cultural significance.

Social Connections and Community Building

A substantial 65% of respondents attribute their involvement in the dance and electronic music scene to friends or social gatherings. This significant figure highlights the community-centric nature of electronic music, where personal connections and shared experiences form the bedrock of engagement. As one respondent vividly shares, "From clubbing after work back in 1995 with friends," it's evident that the scene's social fabric is woven from myriad threads of collective joy and discovery. This communal aspect is not just about being part of the audience but also about active participation, as seen in responses like "I'm a DJ, musician, artist, performer and broadcaster" and "Promoting." Such firsthand accounts celebrate the electronic music scene as a vibrant community where participation and identity are deeply intertwined.

Live Events as Catalysts for Engagement

Music festivals and live events account for 42% of initial engagement, underscoring the transformative power of live music in drawing people into the electronic realm. The visceral experience of attending a live event acts as a gateway, not just to the music itself but to a shared cultural moment that can have a profound and lasting impact. As noted by respondents, involvement often begins with experiences at iconic venues or events, like "Attending clubs like Heavenly Social at Turnmills back when I was young and it all went from there," highlighting the role of specific spaces in cultivating a passion for the genre.

Media Channels as Pathways to Discovery

Traditional and new media channels combined (radio, TV, online streaming, and social media) introduce 34% of fans to the scene, illustrating the genre's widespread presence across platforms. This spread signifies how electronic music transcends boundaries, reaching audiences where they are. "Radio 1's Zane Lowe show from 2007-2015 was also pivotal in my growth into the dance/electronic music scene," reflects the influence of broadcasting in nurturing fanbases. Similarly, the adoption of online platforms indicates the scene's evolution and its ability to engage with digital-native audiences.

Diverse Gateways into the Scene

The 'Other' category, comprising 16%, showcases the myriad, unique journeys into electronic music. From "Family" influenced beginnings to "Dance music magazines i.e., Mixmag," these responses illustrate the eclectic mix of influences that draw people into the electronic music fold. The mention of "Free party movement" and "Raves in warehouses, ticketed through record shops" speaks to the underground roots and the countercultural spirit that continue to define aspects of the scene.

Implications for the Industry

The survey reveals not just the varied entry points into electronic music but also the depth of its cultural and social impact. For industry stakeholders, understanding these diverse pathways is crucial for developing strategies that nurture and expand the scene. Tailoring experiences that resonate with community values, leveraging the power of live events for unforgettable experiences, and embracing the full spectrum of media channels for wider reach are key strategies. Moreover, recognising and preserving the unique, grassroots elements that give the scene its identity, such as the free party movement and independent venues, will be vital in sustaining its vibrancy and relevance.

In conclusion, the UK's electronic music scene is a rich tapestry of experiences, memories, and connections. Its value extends beyond economic metrics, embodying a cultural and social dynamism that demands recognition and support from policymakers and industry figures alike. By fostering an environment where electronic music can flourish, the UK not only preserves a vital part of its cultural heritage but also ensures its continued contribution to the global music landscape.

Safety

The vast majority of electronic music clubbers feel safe when clubbing, with just 1% of men and 2% of women feeling unsafe.

“... I've always felt that dance music, unlike esteemed arts such as opera or ballet, is unfairly maligned. It's worth considering why people feel the need to escape through dance music from the society we've created. I yearn for greater recognition and celebration of our electronic culture. Figures like Sadiq Khan and others seem more adept at this, unlike the Tory approach, which often emphasises being 'tough on crime' and its causes. Ironically, nightclubs, commonly labelled as crime hotspots, are actually safer compared to other venues. In reality, no mass gatherings are entirely safe ...”

- Steven Braines, Co-founder, He.She.They and The Weird and the Wonderful

Deep Dive: Security and Inclusivity in the Electronic Music Scene²⁹

The safety of clubgoers stands as a cornerstone in the electronic music industry, reflecting broader societal issues and the industry's ability to adapt to and address them. With 56% of respondents feeling safe and an additional 27% very safe, the data indicates a relatively high level of confidence among UK electronic music fans in their clubbing environments. However, this positive outlook is tempered by the 16% who feel neutral and the 1% who feel unsafe, revealing underlying concerns that merit attention. These concerns are elucidated through open-ended responses, which collectively paint a vivid picture of the nuanced challenges and opportunities for enhancing safety and inclusivity within the scene.

Security and Surveillance: A Double-Edged Sword

Many respondents call for increased security measures, from "stronger police presence on the street and on foot" to "more security in the club just for presence and actually engaging with the public." Yet, this desire for safety does not come without reservations. There are calls for "better-trained security staff" and critiques of security practices that may inadvertently contribute to an atmosphere of intimidation rather than safety. This dichotomy underscores the need for a balanced approach that ensures security while fostering an environment of trust and respect between security personnel and clubgoers.

Respect for Personal Space and Autonomy

The feedback highlights a significant concern regarding personal space and autonomy, with one participant expressing a desire for men to be "more respectful of my personal space and leave me alone to dance." This sentiment underscores the importance of fostering a culture of consent and respect within venues, highlighting the need for educational initiatives and policies that support these values.

Innovative Solutions for Drug Safety and Spiking Prevention

Responses also touch on the pervasive issue of drug use and spiking, with suggestions ranging from "pill testing kits" to "Anti-spiking safety measures for all drinks." These recommendations point to a growing recognition of the need for harm reduction strategies that address the realities of drug use rather than merely attempting to eliminate it. Such measures not only enhance safety but also demonstrate a commitment to the well-being of patrons, acknowledging the complex interplay between drug culture and the electronic music scene.

Creating Safe and Inclusive Spaces

A recurring theme in the responses is the call for more inclusive and diverse environments, with suggestions for "more female staff," "women's only bathrooms/spaces," and "more diverse programming influencing more gender balance in the audience." These suggestions reflect a broader industry challenge: to create spaces that are welcoming and safe for all,

²⁹ Source: NTIA x Audience Strategies: Electronic Pulse survey of 359 UK electronic music fans in January 2024

regardless of gender, sexuality, or background. This inclusivity extends to addressing concerns of overcrowding and ensuring accessible escape options for those who may feel overwhelmed.

The Implications for the Industry

The insights gleaned from these responses carry profound implications for the electronic music industry. They underscore the necessity of a holistic approach to safety that encompasses physical security, respect for personal space, drug safety, and inclusivity. Implementing these measures is not merely about mitigating risks but about enhancing the overall clubbing experience, thereby ensuring the industry's vibrancy and sustainability. As the industry navigates these challenges, the potential for growth and innovation is immense, offering an opportunity to redefine what a safe, inclusive, and enjoyable electronic music scene can look like. Through collaborative efforts between venues, promoters, and the community, the electronic music scene can continue to thrive as a beacon of cultural and economic significance in the UK.

Satisfaction

A majority of club-goers are satisfied with their experiences, with 28% very satisfied and 48% satisfied, according to recent survey findings. Despite this, there's a significant undercurrent of dissatisfaction, with 18% of respondents feeling neutral and 5% dissatisfied. The main concerns include a shift towards a younger, more volatile crowd post-COVID, a lack of safety and connectedness, and issues of accessibility and inclusivity, especially for older attendees and those outside major cities. High costs and perceived declines in event quality also contribute to discontent.

The survey suggests the need for industry action, including the provision of more diverse and regular venues, improved safety and inclusivity, and better value for money, to re-engage those feeling sidelined. Addressing these challenges can help ensure the long-term health and vibrancy of the UK's club scene, reinforcing its role as a cultural cornerstone.

Deep Dive: The Evolving Landscape of UK Club Culture³⁰

The fabric of the UK's electronic music scene is under a magnifying glass, revealing shifts in demographics, satisfaction levels, and the overarching clubbing experience that merit industry-wide attention. The recent survey uncovers a landscape where 77% of respondents express satisfaction with their clubbing experience, yet beneath this seemingly positive surface lies a complex tapestry of concerns that spotlight challenges and opportunities for the electronic music industry.

Satisfaction and Discontent: A Dual Narrative

The high satisfaction rates, with 28% very satisfied and 49% satisfied, paint an initial picture of a thriving club scene. However, the narrative is nuanced, with a significant portion of attendees, 18% feeling neutral and 5% dissatisfied to very dissatisfied, pointing towards underlying issues affecting their clubbing experiences. The voices of the discontented are especially illuminating, offering candid insights into the evolving dynamics of club culture.

Voices from the Dance Floor: Unpacking Discontent

A recurring theme among dissatisfied club-goers is the transformation of the clubbing demographic and atmosphere. "Since COVID, the crowd seems to have gotten MUCH younger and volatile," one respondent notes, highlighting a shift towards a less connected, more device-focused experience. This sentiment is echoed by another, lamenting the "bad vibe [and] heavy-handed security," indicative of an environment that feels less safe and welcoming than before.

The issue of accessibility and inclusivity also emerges, with several respondents feeling alienated by the current clubbing landscape. "Outside the big cities, there are precious few places to experience dance music where a 57-year-old man like myself can go and not feel like a weird old stalker," shares a participant, calling for more age-inclusive events. The sentiment of exclusion extends to the logistical and financial aspects of clubbing, with complaints about "too much coke and drug dealers," "bouncers staring," and the high cost of participation. "Prices are too high on drinks and tickets. Events are getting smaller," states another, reflecting concerns over value for money and the overall clubbing proposition.

Implications for the Industry: Addressing the Cracks

The feedback underscores critical areas for industry intervention. The call for more regular and diverse venues, alongside a desire for safer, more inclusive environments, points to a need for strategic venue support and licensing reforms. Addressing the affordability and accessibility of clubbing experiences could help widen the appeal of electronic music events, potentially re-engaging those who feel sidelined by current trends.

Furthermore, the expressed discomfort with the prevailing youth-centric focus suggests a market opportunity for events catering to a broader age range, fostering a more inclusive community spirit. Education around club etiquette and the

³⁰ Source: NTIA x Audience Strategies: Electronic Pulse survey of 359 UK electronic music fans in January 2024

promotion of respect within club spaces could also enhance the overall experience, making electronic music venues more welcoming for all attendees.

The survey's insights reveal a complex interplay of satisfaction and discontent within the UK's club scene, highlighting the need for a nuanced approach to nurturing the electronic music industry. By addressing the identified challenges, stakeholders can work towards a more inclusive, accessible, and enjoyable clubbing experience for all, ensuring the long-term vibrancy and sustainability of this cultural cornerstone.

Diversity and inclusion

When asked if they believed the Dance / Electronic Music scene promotes diversity and inclusivity the majority of electronic music fans surveyed did: 79% of women and 87% of men believed, or strongly believed it did. Of those who did not believe it did most were neutral (16% and 12% respectively) rather than believing that it did not.

Impact on communities and culture

The survey underscores the vital role of dance and electronic music events in the UK, highlighting their impact on creativity, innovation, inclusivity, and community building. With 70% of respondents viewing these events as crucial for cultural evolution and 63% emphasising their importance as safe spaces for marginalised groups, particularly the LGBTQ+ community, the significance of these gatherings extends beyond entertainment. They are acknowledged for driving trends in art and fashion (52%) and serving as essential community hubs (50%), fostering cohesion and supporting the local economy. However, challenges like licensing, gentrification, and venue support persist. Addressing these is key to sustaining the scene's vibrancy and ensuring its continued contribution to the UK's cultural and economic landscape.

Deep Dive: The Cultural and Community Impact of Dance/Electronic Music Events³¹

Centres of Creativity and Innovation

Dance and electronic music events are often heralded as epicentres of creativity and innovation, a sentiment echoed by a massive 70% of survey respondents. This view is supported by vibrant testimonies that describe these spaces as "places where people can share different ideas and talents," evolving into something uniquely influential. The survey reveals that such events act as melting pots where "different generations, cultures, backgrounds come together," fostering an environment ripe for creative exchange and innovation. One participant vividly describes the scene as "a testing ground for everything good. Sonically, culturally and creatively," underscoring the role of electronic music in shaping identities and connections to the world.

Safe Spaces for Marginalised Groups

The importance of dance/electronic music events in providing safe spaces for marginalised groups is highlighted by 63% of participants. These venues are compared to sanctuaries, akin to "a church, where people go to connect to something and feel like they belong," offering an inclusive atmosphere where "everyone is welcome, and a lack of judgement" prevails. Such spaces are especially vital for the LGBTQ+ community, serving as welcoming environments that facilitate expression and community solidarity. "Dance music and clubs have always played an essential role in the LGBTQ+ community," one respondent notes, emphasising the uplifting and safe environment these venues provide.

Driving Forward Trends in Art and Fashion

Fifty-two percent of respondents believe that dance/electronic music events are instrumental in advancing trends in art and fashion. This perspective is enriched by observations that these events are not just about music but also serve as platforms for aesthetic and stylistic innovation. The interconnection between electronic music and visual culture is evident, with one participant stating, "Electronic music has always felt like the cutting edge of culture, fashion, art etc." These events are seen as arenas where new generations can "feel a level of ownership and freedom," contributing to the dynamic interplay between music, fashion, and art.

Essential Building Blocks of Local Communities

The role of dance/electronic music events in cementing the foundation of local communities is acknowledged by 50% of survey takers. These events are not merely entertainment venues but pivotal community hubs that "bring different cultures and social backgrounds together." They are likened to "spaces outside of the mainstream" that are "essential for a healthy society for building community and growing the arts." The testimony underscores the significant impact these events have on fostering community cohesion, providing a platform for shared experiences, and supporting the local economy.

³¹ Source: NTIA x Audience Strategies: Electronic Pulse survey of 359 UK electronic music fans in January 2024

Reflecting on the Industry's Future

The insights garnered from the survey paint a vivid picture of the multifaceted impact of dance/electronic music events on communities and culture. These events are not just entertainment venues but pivotal platforms for innovation, inclusivity, and community building. The industry is called upon to recognise and nurture these spaces, acknowledging their critical role in cultural and economic development. Challenges such as licensing, gentrification, and the need for sustained artist and venue support must be addressed to ensure the longevity and vitality of the electronic music scene. By fostering an environment that encourages creativity, inclusivity, and community engagement, the dance/electronic music industry can continue to be a significant cultural and economic force in the UK.

Appendix: A deep-dive into the open-ended responses to this question

The open-ended responses from the survey conducted provide a rich tapestry of perspectives, highlighting the profound impact of dance and electronic music events on communities and culture. These responses, teeming with personal anecdotes and reflections, not only corroborate the statistical findings but also infuse the narrative with depth and authenticity. Below is a detailed account of these insightful contributions, woven into the overarching themes of the report.

Centres of Creativity and Innovation

Respondents vividly describe dance and electronic music events as "centres of creativity and innovation," where the blending of diverse ideas and talents fosters unique cultural evolutions. One participant notes, "These are places where people can share different ideas and talents which, when combined, evolve into something new which takes its own form." This sentiment is echoed across numerous responses, underscoring the belief that electronic music venues are not just physical spaces but crucibles of creative synergy. Another respondent adds, "Dance music spaces are the testing ground for everything good. Sonically, culturally and creatively," highlighting the role these environments play in pushing the boundaries of what is possible in music, art, and culture.

Safe Spaces for Marginalised Groups

A significant portion of the feedback emphasises the role of dance/electronic music events in providing safe spaces for marginalised groups. One respondent compares these spaces to a "church," a place for connection and belonging, illustrating the profound sense of safety and inclusion these venues offer. "Dance music and clubs have always played an essential role in the LGBTQ+ community," shares another, pointing out the welcoming and uplifting environment that supports and celebrates diversity. These responses illuminate the importance of maintaining and protecting such spaces, where individuals can express themselves freely and without fear of judgement.

Driving Forward Trends in Art and Fashion

The influence of dance/electronic music on art and fashion trends is a recurring theme, with respondents acknowledging the genre's role in shaping aesthetic and stylistic movements. "Electronic music has always felt like the cutting edge of culture, fashion, art etc.," one person remarks, suggesting that the scene is a beacon for innovation that attracts and inspires the new generations. This perspective highlights the symbiotic relationship between the music and the visual culture it inspires, with events serving as platforms where fashion and art intersect with sound in dynamic and trend-setting ways.

Essential Building Blocks of Local Communities

Many responses spotlight the integral role of dance/electronic music events in the fabric of local communities. They are seen as "spaces outside of the mainstream" that are vital for "building community and growing the arts," according to one respondent. Another highlights the importance of physical spaces for community and culture to thrive: "You need physical spaces to come together. An immersive experience of music and lights + aesthetics + vibes." These insights underscore the value of dance/electronic music venues as communal hubs that not only entertain but also enrich local cultures and economies.

Challenges and Opportunities

While the responses overwhelmingly celebrate the positive impacts of dance/electronic music events, they also touch upon challenges such as the need for inclusive and diverse representation, the fight against gentrification, and the importance of supporting grassroots venues. "There's a great sense of freedom of expression and forward-thinking ideas within the dance music scene," one participant notes, also cautioning that "the safety of marginalised groups can sometimes depend on the event you go to." This nuanced view suggests a pathway for the industry: to amplify its strengths in creativity, inclusivity, and community building, while also addressing the areas where improvement is necessary.

In closing, the open-ended responses from the survey offer a compelling glimpse into the myriad ways dance and electronic music events impact individuals and communities. They paint a picture of a vibrant cultural phenomenon that transcends mere entertainment, acting as a catalyst for creativity, inclusivity, and community cohesion. As the industry looks forward, these insights not only celebrate the achievements but also chart a course for addressing the challenges, ensuring the continued growth and vitality of the dance/electronic music scene in the UK.

Four real lives

Every electronic music fan who participated in our survey shared a unique story of how electronic music culture has influenced their life. This chapter has mostly aggregated these stories, offering a broad perspective on the collective experiences.

In addition, we wanted to provide a more intimate look at some individual narratives, to enrich the overall story with personal depth. Our hope is that these stories illustrate the significant influence of this scene on its members.

Below are a few randomly chosen survey responses, transformed into narratives for you to explore:

Respondent #358

She is a 47-year-old electronic music enthusiast from a city in Yorkshire and The Humber. Her musical tastes span from Pop to Classical, but her heart beats for Dance/Electronic music. Since stepping into the club scene in 1993, her passion for electronic beats has grown, leading her to club monthly, where she immerses herself in House, Drum and Bass, and Dubstep rhythms. Her commitment to the electronic scene is profound, seeing clubbing as an essential outlet for expression, community, and mental wellness, with music selection being her guide to choosing clubbing venues. On a typical night out, she invests £51-£100, cherishing the emotional uplift and connections forged through shared musical journeys. The community and sustainability are critical to her; she champions venues that prioritise environmental practices and safety, highlighting the importance of renewable energy and efficient resource use. She is a regular at music festivals, finding her tribe through friends, gatherings, and live events. She appreciates the evolving landscape of Dance/Electronic Music, noting its presence on platforms like TikTok, which shapes her musical discoveries. She identifies with both the rave/underground and mainstream/commercial subcultures, praising the scene for its diversity and inclusivity. For her, electronic music events are more than entertainment; they're cultural pillars that foster safe spaces, spur creativity, and set fashion and art trends, embodying the essence of community and belonging.

Respondent #87

A 20-year-old enthusiast from the North West dives deep into the heart of Dance/Electronic music, exploring its vibrant beats daily and hitting the club scene weekly. Since stepping into the clubbing world in 2021, his life has been a whirlwind of rhythm and connection, though recent times have seen a slight retreat to focus on finances, health, and the evolving dynamics of his social life. Choosing club venues based on the music type, he invests £51-£100 into each night, seeking more than just entertainment; he seeks a sense of belonging. "These events," he says, "provide a platform for expressing my identity, improving my well-being, and immersing myself in a community of like-minded souls." His satisfaction with clubbing remains high, feeling secure within the pulsating walls of his chosen venues. This young man sees Dance/Electronic music festivals as expanding his horizons, attending more in the past year and finding TikTok a useful tool for discovering new tunes. He feels a profound connection to rave and underground scenes, where diversity and inclusivity are not just ideals but lived realities. "Electronic music events," he asserts, "push boundaries, making them essential building blocks of local communities and safe spaces for marginalised groups." His journey into the scene, kickstarted by friends and live events, has opened up a world where creativity, innovation, and fashion trends flourish. For him, the impact of Dance/Electronic music on communities and culture is immeasurable, fostering unity, sparking innovation, and driving forward the trends that shape our world.

Respondent #107

He is a 31-year-old male from the South West's city life, deeply woven into the Dance/Electronic music fabric, with a rich taste spanning Breakbeat to Psytrance. Weekly immersions in electronic tunes and monthly club outings mark his journey since 2007. Recent times see him clubbing less, prioritising finances and health, yet his choice of venue still hinges on the headline act, budgeting £51-£100 per night for the experience. Clubbing for him is more than a night out; it's a source of wellbeing and musical discovery, although he's currently neutral about his clubbing satisfaction and safety. He suggests practical measures like pill testing for improved safety at events. Despite a lukewarm view on sustainability at venues, his festival attendance is on the rise, driven by social connections and a keen eye for emerging trends via platforms like TikTok, albeit with minimal impact on his musical exploration. Professionally, as a creative designer in the music and events sector, his firsthand experience underscores the role of electronic music in fostering creativity, diversity, and community cohesion. He champions the mainstream electronic scene's inclusivity and its cultural contribution, advocating for more grassroots support to keep the vibrant electronic music culture thriving. His narrative captures the essence of a modern music enthusiast, blending a passion for beats with a call for safety, sustainability, and community investment in the electronic music landscape.

Respondent #217

In the vibrant heart of London, a 33-year-old woman finds her rhythm within the beats of Dance/Electronic music. Daily, she immerses herself in the world of Breakbeat, Techno, and Psytrance, her life a continuous stream of melodies that resonate with her soul. Since her first clubbing venture in 2012, the monthly ritual has remained a constant, a testament to her unwavering love for the electronic scene. Her dedication goes beyond mere attendance; each night out is an investment of £51-£100, carefully chosen based on the main artist or DJ performing. It's in these spaces she finds a sense of community, makes new friends, and fully expresses her identity. "Attending these events," she reflects, "is like finding a piece of myself in every beat, every dance, every connection." Safety and sustainability hold importance in her clubbing choices, with a particular emphasis on renewable energy and waste recycling. Yet, it's the festivals that truly capture her essence, attending as many as the year before, each a new opportunity to deepen her connection to the underground and specific genre-based communities. She firmly believes in the power of the Dance/Electronic music scene to promote diversity and inclusivity, seeing these events as "essential building blocks of local communities, a safe space for marginalised groups, and a hub of creativity and innovation." To her, these spaces are not just venues for music and dance but crucibles of cultural transformation, driving forward the trends in art and fashion that shape our world.

Conclusion: The Resonance of Electronic Music

This exploration into the UK's electronic music scene, through the lens of our comprehensive survey, underscores the profound impact this genre has on its audience, the economy, and the cultural landscape at large. The insights gleaned from the responses reveal not just the numerical significance of engagement and satisfaction but, more importantly, the deeper emotional and social connections fostered by electronic music.

The survey highlights a strong, daily engagement with electronic music across diverse age groups, showcasing the genre's broad appeal and its integral role in the lives of its listeners. The shift in clubbing behaviours, with a nuanced increase among younger fans and a steady dedication from older generations, reflects evolving societal trends and personal priorities. This adaptability of electronic music to fit the changing contours of its audience's lives speaks to its enduring relevance.

Festivals emerge as vital spaces for connection, particularly appealing to female and older fans, indicating the genre's inclusiveness and its ability to create communal experiences outside the traditional club setting. The emotional and mental health benefits reported by a significant majority of participants underline the therapeutic value of dance and electronic music, serving as a testament to its power to heal, unite, and inspire.

However, the journey is not without its challenges. Economic pressures, lifestyle changes, and spatial shifts present hurdles to sustained engagement. The industry stands at a crucial juncture, needing to address these challenges while capitalising on the opportunities to evolve with its audience. The call for greater diversity, inclusivity, and safety within club spaces highlights the need for the scene to reflect the values of its community, ensuring a welcoming environment for all.

The open-ended responses provide a rich narrative of personal experiences, reinforcing the survey's findings. They illustrate the transformative power of electronic music in inspiring creativity, forging connections, and providing solace. These personal stories are a powerful reminder of the genre's impact beyond the dance floor, influencing fashion, art, and even career paths.

As we conclude, it's clear that the UK's electronic music scene is more than just a collection of events and artists; it's a vibrant community that spans generations, cultures, and geographies. Its ability to adapt and grow, to inspire and heal, positions it as a significant cultural and economic force. The future of electronic music in the UK is bright, provided it continues to listen to and evolve with its audience. The industry's challenge, and opportunity, is to harness this potential, addressing the gaps and building on the strengths, to ensure the beat goes on, resonating with old fans and new listeners alike.

In essence, the UK's electronic music scene is not just about the rhythm of the night but the pulse of a community, the heartbeat of a culture that thrives on innovation, inclusivity, and connection. It's a testament to the power of music to bring people together, offering a space for expression, celebration, and reflection. As we look ahead, let's dance towards a future where electronic music continues to be a beacon of creativity, unity, and joy.

3.3. Measuring the digital demand for electronic music

This section on measuring the digital demand for electronic music delves into the intricacies of the UK's audience engagement and their appetite for electronic music artists, nightclubs, and festivals. Through an extensive analysis of 320 entities, including the top-rated artists, nightclubs, and festivals, the report uncovers the size and scope of demand using innovative cross-platform measurement tools developed by Audience Strategies. Key findings highlight the significant online following and Google search interest in the electronic music scene, revealing not only the broad demographic appeal beyond the traditional clubbing audience but also the noteworthy position of UK artists on the global stage. The data provides a comprehensive understanding of how electronic music maintains its relevance and popularity among the UK populace, underscoring the cultural and economic impact of the genre.

In this section, we explore the UK electronic music audience and the demand for electronic music artists, nightclubs and festivals. To do this, we took a list of the global top 200 electronic music artists (as rated by Viberate), the top 58 electronic music nightclubs (as featured in top-rated nightclubs by DJ Mag, Mixmag and the Guardian) and the top 64 music festivals featuring electronic music artists (as rated by Viberate), 320 entities in total to represent the electronic music industry in the UK.

Based on these 320 entities, we analysed key signals of demand: the number of Google searches for each entity in the list and the number of UK followers across social media platforms. This was done using [a new tool](#) that Audience Strategies developed with Audiense that allows us to measure cross-platform signals of demand by country by platform and, crucially, by audience.

Sizing the demand:

- Across the top 200 musicians with an account on Instagram, there are a total of 10.7M followers in the UK, and on X (formerly Twitter), there are 11.1M.
- The entity with the largest following, Calvin Harris, has 2.7M Twitter followers in the UK.
- Google Searches for the top 200 electronic musicians amounted to a total of 18.9 million in 2023.

Demand for Electronic music is not limited to the 18-24, (or even 18-34) clubbing audience, on both Twitter and Instagram on average 80% of the UK followers of electronic music accounts are under 35.

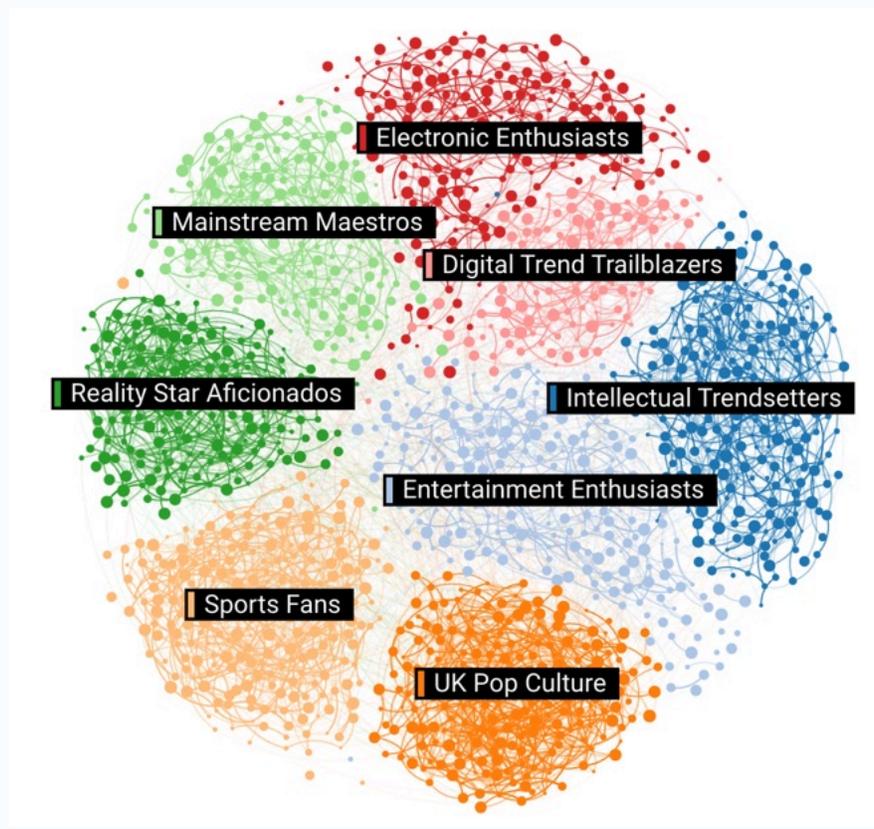
The prominence of UK talent

The UK comes second only to the US in the number of electronic music artists it contributes to the global top 200. Of the global top 200 electronic music artists 29 of them are from the UK. These 29 UK artists account for 15% of places in the top 200, but 36% of the demand in the UK in 2023, as measured by Google search volume. Furthermore, they hold their own in the US, accounting for 16% of the demand for the top 200 electronic music artists there!

3.4. Electronic Music Audience Segmentation

This section on Electronic Music Audience Segmentation dives deep into the rich tapestry of the genre's followers, revealing an audience far more varied than traditional stereotypes suggest. Through sophisticated data analysis, it identifies eight unique segments within the electronic music community, each with its own distinct interests, from hardcore Electronic Enthusiasts to Intellectual Trendsetters and Sports Fans. This segmentation not only challenges the conventional view of electronic music fans but also highlights the genre's universal appeal across different genders, ages, and social groups. The findings underscore electronic music's potential for fostering a diverse and inclusive community, prompting the industry to consider how it can further nurture this diversity and ensure the genre remains a welcoming space for all.

The electronic music audience is a broad and diverse one, made up of members with diverse interests, passions and needs. Using our set of the top electronic music artists, nightclubs and festivals, we identified followers of these handles on X (formerly Twitter) and segmented them based on their interests using a social media analytics tool called Affinio.



Electronic music stands out not just as a genre but as a cultural movement that transcends traditional boundaries. This audience segmentation reveals a striking insight: electronic music doesn't just belong to a niche audience; it's everyone's beat.

At the heart of this insight is the identification of eight distinct listener segments, each a unique mosaic of interests and preferences that challenge the stereotypical view of electronic music fans. From the die-hard Electronic Enthusiasts grooving to the beats of Calvin Harris and Deadmau5, to the Sports Fans cheering for their favourite teams, and even the Intellectual Trendsetters musing over the works of influential thinkers, the diversity is staggering. It's a bit like discovering that your nan, your mate from the gym, and that person you always see at the coffee shop all secretly share a playlist.

What does this tell us? For starters, electronic music has become a universal language, spoken across genders, ages, and social groups. The report highlights an intriguing blend of gender dynamics, with Digital Trend Trailblazers (who live for internet culture and viral trends) being predominantly female, and Electronic Enthusiasts mostly male. It seems electronic music is doing what few other genres can – it's weaving through our digital and real-life personas, connecting us in unexpected ways.

This finding has profound implications for the industry and beyond. If electronic music listeners are as varied as this study suggests, the genre's potential for growth, innovation, and community building is immense. The question now is, how do we nurture this diversity? How do we ensure that electronic music continues to evolve as a space for everyone, from every walk of life?

What did we find?

We identified eight distinct segments, each composed of individuals with shared interests, and sufficiently different to those shared by other segments. The core interests of these groups range from a core electronic music audience in the **Electronic Enthusiasts**, whose key interests include electronic music stars such as Calvin Harris, Skrillex and Deadmau5, and radio stations such as IExtra and Rinse FM to **Sports Fans**, whose focus is professional athletes and teams, sports commentators and fan discussions and even Intellectual Trendsetters who follow **prominent authors**, renowned scientists, and influential thinkers. These segments also vary considerably in their gender composition with the Digital **Trend Trailblazers** (immersed in the world of internet culture, memes, and viral trends. They have a keen eye for content that resonates with the zeitgeist), being 71% female and the Electronic Enthusiasts being 63% male.

4. Electronic Music's Subcultures

This section on Electronic Music's Subcultures delves into the diverse and vibrant world of UK electronic music, exploring its myriad subgenres and the unique cultural identities they foster. From underground techno to mainstream dance music, it showcases how different styles like drum and bass, IDM, garage, grime, and dubstep contribute to the scene's dynamism. Highlighting the genre's deep roots in multicultural influences and its ability to transcend cultural barriers, the section underscores electronic music's role in promoting diversity and inclusion. Through the lens of various collectives and initiatives, it illustrates efforts to democratise access to music and create inclusive spaces, reflecting on electronic music's impact on fashion, media, and technology. The narrative captures the essence of electronic music as a powerful tool for global unity and cultural expression, evidencing its significant influence beyond mere entertainment, shaping British identity and contributing to social change.

The UK electronic music scene encompasses a range of subcultures, from underground techno in cities like Nottingham and Glasgow to mainstream electronic dance music at festivals across the country. Other genres include drum and bass, IDM, garage, grime, and dubstep, which all originated in the UK. Each subgenre carries with it a dedicated fanbase and a unique cultural identity, contributing significantly to the diversity and vibrancy of the music scene.

Take the example of drum and bass which has fragmented into various subgenres and micro-communities within its scene, ranging from jump-up, liquid and minimal drum and bass to neurofunk & techstep. From the underground rave and Jungle scenes in the early 1990s in the United Kingdom, it still remains the most popular in the UK and has become a global culture.

The cultural impact of these subcultures extends far beyond their musical contributions. Carly Heath aptly highlights, "Britain's multicultural nation and Caribbean immigrants have fundamentally shaped electronic music." This fusion of influences underscores the genre's capability to transcend cultural barriers, fostering a diverse and inclusive environment. Similarly, David Martin emphasises the rule-breaking nature of dance music, noting, "Electronic music transcends language and cultural differences, making it a powerful tool for global unity."

Diversity and inclusion have been the fundamental values in the electronic music scene. The scene in the UK has undergone many shifts and trends including inclusive event timing such as daytime or early evening raves, and various initiatives aimed at democratising access to music production and DJing. These efforts demonstrate a dedication to making electronic music available to people of all cultures and backgrounds. People from various backgrounds, including LGBTQIA+ communities, Caribbean, African, South Asian, and Southeast Asian communities, have all found a welcoming space within the electronic music scene in the UK.

These collectives and initiatives are redefining the narrative around cultural representation and inclusion within the electronic music landscape. For instance, Daytimers, a collective founded during the lockdown, is focused on redefining the South Asian cultural status, while Eastern Margins fosters a community for East and Southeast Asian ravers, providing a platform to celebrate and promote their culture in the London underground club scene.

“... Our efforts at Daytimers and Dialled are making sure that people are aware that there is space for them. One of the challenges in our journey has been to represent South Asian musicians and artists as a whole ...making sure it's not all bundled up into one specific thing. The recognition and support from local councils and public bodies was really reassuring in the sense that like, you know, this clearly resonates not just within our own communities, but also on a wider lens as well ...”

- Provhat Rahman, Founder, Daytimers and Co-founder, Dialled In on representation, diversity and support

Moreover, Pxsy Palace is known for creating safe, inclusive party spaces for women, trans, non-binary, and intersex people of colour, challenging mainstream club culture and promoting diversity. Similarly, the he.she.they. club night and record label aims to create inclusive spaces for all genders, sexualities, and ethnicities, celebrating diversity in electronic music and club culture. GGI 卍 founded by activist and nightlife organiser June Lam focuses on creating a safe and inclusive space for queer, trans, and non-binary East and South East Asian communities to celebrate their culture and identity.

Another notable collective, Adonis, founded in London, is known for its vibrant and inclusive events that provide a welcoming and safe space for people of all sexual orientations and gender identities. It has become a symbol of queer culture's influence and presence in the UK's electronic music scene, contributing to the broader dialogue about diversity and representation in the nightlife and music industries.

The Black Artist Database (B.A.D.) and Black Obsidian Sound System (B.O.S.S.) were founded to promote and support Black artists in electronic music. Black Artist Database (formerly known as Black Bandcamp) is a community-based platform that hosts a wealth of international Black-owned record labels, artists, producers and bands. Black Obsidian Sound System (B.O.S.S.) is a collective challenging dominant norms in sound-system culture, focusing on community engagement and support for the QTIBPOC community through various creative endeavours. Nominated for the 2021 Turner Prize, B.O.S.S. questions societal norms and the appropriation of cultural forms, fostering a nuanced understanding of individual and collective concerns within marginalised communities.

Additionally, initiatives such as Rupture and EQ50 focus on drum and bass music, with Rupture being known for its club nights and music label, and EQ50 serving as a mentorship program for women and non-binary individuals in drum and bass. eott, based in Brighton, is a project that aims to normalise discourse surrounding mental health in the UK dance music scene, creating campaigns for young people to seek help and form a community.

“... Rates of diagnosed depression are generally around 20%. In young people, anxiety is even higher, up to 31%. Mental health issues are generally more prevalent among minority groups, so those are also important to look at, not to mention all the people experiencing mental health problems without a diagnosis ...”

- George Taktak, Founder & CEO, How Mental

Electronic music expands and reaches various micro-communities and promotes inclusivity, particularly within the queer community. These collectives and initiatives play a significant role in promoting diversity, inclusivity, and representation in the electronic music scene and broader UK culture, providing platforms for underrepresented groups and challenging mainstream narratives within the music and club culture.

“... Without club culture, would I be exposed to the different communities and cultures that I am now?”

No, I don't think so. A football club doesn't expose me to all the different communities and cultures of London that a nightclub does ...”

- Andy Blackett, Head of Promotions, Fabric London

Electronic music's influence stretches far beyond the confines of the music itself, permeating into fashion, media, film, and technology. This impactful relationship is evident in the way outfits and styles in clubs often influence mainstream fashion. Steven Braines captures this interplay, highlighting how the unconventional club culture influences fashion designers, ultimately shaping streetwear trends.

"...A lot of fashion comes from people being experimental in their dress sense and different things like that, because they feel that they can go and wear that crazy outfit. And then that permeates into fashion, into TV programs, into films..."
- Steven Braines, Co-founder, He.She.They and The Weird and the Wonderful

Moreover, he emphasises the strong connection between electronic music and technological advancements, particularly in the realm of advertising and social media, where high-energy visuals have become a defining feature of performances. An interesting comparison is drawn, illustrating how companies like Tesla often use electronic music in their advertisements, aligning with the genre's association with technology and modernity. This aligns the music with the message of the tech product, creating a cohesive and fitting narrative. The genre's presence in media and film, coupled with its association with modernity and technology, has solidified its place in British culture.

The widespread appeal of electronic music is greatly attributed to its dynamic connection with various forms of entertainment. This genre's interconnectedness with broader cultural movements and social change underscores its significant influence. It has become a cornerstone of British identity, permeating various aspects of culture and society.

Shifts in club culture have impacted grassroots sub-cultures dramatically. The increasing availability of electronic music, combined with innovations in clubbing experiences, has both challenged and invigorated the grassroots movement. The industry's evolution from a niche subculture to a more mainstream phenomenon has brought about greater diversity in its audience. Festivals like Glastonbury have evolved from counter-cultural roots to mainstream phenomena, playing a crucial role in showcasing diverse artists and shaping music culture.

Despite its evolution into a mainstream phenomenon, electronic music continues to face challenges in maintaining its original ethos and principles. The underground music infrastructure in the UK, particularly in small venues, has historically played a pivotal role in cultural and economic landscapes. These intimate spaces have nurtured groundbreaking music movements, influencing mainstream radio and fashion trends while also fostering progressive social atmospheres. However, these venues face significant challenges, including gentrification and economic pressures, exacerbated by the Covid-19 pandemic. Efforts such as the Save Our Venues campaign reflect a community-driven initiative to preserve these cultural hubs, highlighting the importance of grassroots support in safeguarding the future of these venues and the music scenes they nurture.

"...Without these tiny small music venues that have been shutting, where else are the next generation of electronic musicians going to get to play? How do you become headliner material when there are no grassroots venues and festivals to play at? Where are we going to be in 10 years if our emerging artists don't have the space to play?"
- Samantha Parsley, Professor at University of Portsmouth and Founder of In the Key

Case study: The Cultural Significance of Communities and Subcultures

We spoke to Provhat Rahman, Founder, Daytimers and Co-founder, Dialled In, examining electronic music as a cultural phenomenon, its economic ramifications, and the critical importance of inclusivity in nurturing a lively and sustainable community.

The Pillars of Community Building

Provhat points out that electronic music, due to its low entry barriers and minimal equipment requirements, serves as a potent tool for grassroots organisations. The narrative shared reveals that the initiation of a community can be as simple as setting up decks and a sound system, fostering a group united by a passion for electronic sounds. This ease of access not only makes music production and enjoyment more democratic but also lays the groundwork for community radio, collectives, and venue operations. He emphasises how electronic music offers a unique avenue for expression and community involvement, capable of organic growth from minimal resources.

“... I think electronic music is really in that sense, just because of how little or how much you can do with really limited infrastructure...”

Fostering Inclusivity and Representation

Central to the mission of Daytimers and Dialled In is a commitment to inclusivity and the representation of diverse voices. Their efforts to elevate the narratives of marginalised communities, including South Asians and a wide spectrum of queer and trans individuals, aims to create welcoming and valued spaces for all. These initiatives highlight the significance of presenting diverse narratives to ensure the electronic music scene mirrors the varied backgrounds of its participants.

Challenges and Triumphs in Representation

Provhat addresses the challenges faced in accurately representing South Asian musicians and artists beyond stereotypical narratives. He underscores the continuous effort to portray the rich diversity within the South Asian diaspora without resorting to homogenisation. The aim is to shed light on both individual and collective stories that contribute to the dynamic mosaic of the UK's electronic music scene.

The Impact of Grassroots Movements

Daytimers and Dialled In's experiences underline the transformative potential of grassroots movements in redefining narratives around representation and inclusivity. By offering platforms for underrepresented artists, these initiatives challenge prevailing paradigms and foster a more inclusive and diverse musical environment. Local councils and public bodies have provided vital support to Dialled In, demonstrating the potential for significant progress through collective action.

“...Using it as a vessel for grassroots organising is really effective... it builds really strong pillars that you can foster a community around...”

The Future of Electronic Music in the UK

Provhat also mentions the integration of traditional South Asian sounds with Western electronic beats, a trend poised to refresh the genre. This blend of cultures and sounds not only enriches the electronic music scene but also fosters new avenues for expression and connection. The continued push for boundary expansion keeps the focus on maintaining the electronic music scene as a realm of inclusivity, creativity, and innovation.

“... Taking traditional sounds from South Asia and reworking them into Western electronic music ... It's actually still a really, really novel concept ...”

In summary, Daytimers and Dialled In's engagement with the UK's electronic music scene underscores music's efficacy as a mechanism for social change, community formation, and cultural expression. The enduring dedication to cultivating an inclusive, diverse, and vibrant musical community aims to inspire future generations towards innovation and unity.

5. Communities and Culture. Further benefits of electronic music

This section on "Communities and Culture: Further Benefits of Electronic Music" delves into the profound effects of electronic music beyond mere entertainment, highlighting its essential role in shaping communities and cultural dynamics. It synthesises over two decades of academic research, underscoring the positive impacts of dance music on community cohesion, personal well-being, and cultural development. From fostering a sense of belonging and facilitating social bonding to promoting individual mental health and influencing fashion and art, this comprehensive overview showcases the multifaceted value electronic music brings to society. It challenges outdated stereotypes of nightclubs, presenting them as vibrant hubs for social interaction, creative expression, and personal transformation. This segment aims to provide readers with a deeper appreciation of electronic music's integral place within the cultural fabric of communities, inviting further exploration of its diverse benefits.

Electronic music also has an impact on communities and culture. Although not quantified here, these lead to commerce benefits since, by contributing to the cultural fabric of a community, they attract creative talent and support the local arts scene etc.

There has been lots of peer-reviewed empirical research in academia that has strongly evidenced the positive impact of electronic dance on communities, well-being and culture. It is not just anecdotal. It stands in stark contrast to some perceptions of nightclubs based on old stereotypes and past behaviour.



We recently dug into more than 45 academic papers on the topic and published a new report on dance music's impact on communities and culture. This report draws together two decades of academic research on dance music and nightlife culture and provides insights into the deep and valuable impact that dance music has on our communities and culture.

The report covers the following topics:

- **Community & Belonging:** The report found that clubs provide a sense of community and belonging, and they bring people together. Clubs serve as a break from the mundanity of daily life and provide opportunities for real-world bonding experiences, leading individuals to feel a strong sense of unity and belonging.
- **Social Bonding & Togetherness:** Clubs provide a space for social intimacy in an increasingly isolated, digital world. The opportunity to make friends is a major driver for participation in nightlife and leads to a sense of belonging to a unique and meaningful community.
- **Identity Expression & Curation:** Clubs promote tolerance and acceptance and have long been important spaces in which individuals can safely experiment with identity, question and shift social norms, and challenge normality. Clubs serve as a setting for a like-minded community to congregate and continue to play a role in identity formation throughout adulthood.

- **Individual Wellbeing & Personal Transformation:** Clubs promote mental wellbeing and serve as multi-value assets, providing benefits to esteem and wellbeing that alleviate public health services. Dancing at clubs releases endorphins, staves off depression, and has numerous cognitive benefits.
- **Fashion:** Clubs influence fashion and have a significant impact on style.
- **Visual Aesthetics:** Clubs influence visual culture and push the limits of AV technology.
- **Art & Culture:** Clubs influence art and provide opportunities for creative people to congregate. Clubs serve as participatory theatre productions, fostering grassroots creativity and providing de facto creative apprenticeships.
- **Wellbeing & Dance:** Dancing is the physical activity at the centre of club culture and has numerous benefits, including reducing feelings of anger, staving off depression, and improving cognitive function. Dancing in a club context fosters social bonding and reinforces a sense of togetherness.

The report found that dance clubs and festivals have a profound impact on communities, culture, and commerce. Clubs provide a sense of community and belonging, and they bring people together. They are spaces for expression and identity formation and serve as a place for like-minded individuals to congregate. Dance clubs promote mental wellbeing, and they have a significant impact on fashion, visual aesthetics, art, and culture. Additionally, the report found that dancing promotes wellbeing and has numerous benefits, including reducing feelings of anger, staving off depression, and improving cognitive function.

If you want to learn more about the impact that dance music has on our communities and culture, then this report is a must-read. Whether you are a fan of dance music or simply interested in learning more about the impact that music has on our world, this report is a must-read. Read the full report on Dance Music's impact on Communities and Culture on the NTIA website [here](#).

What we heard:

"... Dance spaces are about more than just drinking booze... It's about identity building, collective unity, the mental health and well-being that comes with dancing in that space ..."

- Carly Heath, Night Time Economy Advisor for Bristol

"... There's a collective need to release energy and frustrations that have accumulated during the general malaise of shitness that young people have to contend with now. The nature of this music provides a unique offering to kids for a cathartic experience ..."

- David Selby, CEO, Resident Advisor

6. Conclusion

Electronic music continues to be a pivotal force in the UK, shaping not only the economy but also the cultural and social fabric of the nation. This year's findings underscore a nuanced narrative of growth amidst challenges, with the industry's economic impact slightly recalibrating to £2.5 billion. This slight dip from the previous £2.63 billion reflects broader socio-economic shifts, including a decrease in nightclub numbers and attendance. Despite these hurdles, electronic music's cultural and communal contributions remain undiminished, reinforcing the UK's global stature as a crucible of electronic music innovation and diversity.

The genre's increasing popularity, as evidenced by its leading presence in festival line-ups and its substantial share of the UK singles revenue, speaks to its enduring appeal and its role in enriching the UK's cultural landscape. The shift towards smaller, more intimate festival experiences and the notable increase in festival attendance highlights a community seeking meaningful connections through music. Furthermore, the global influence of UK electronic music, illustrated by artists like Calvin Harris commanding significant international airplay, reinforces the UK's influential position on the world stage.

Yet, the industry navigates a complex landscape of operational and regulatory challenges that threaten its vibrancy and sustainability. The decline in physical spaces for music, highlighted by a 3% reduction in nightclubs and a corresponding decrease in nightclub visits, underscores the pressing need for strategic interventions to preserve and promote these vital cultural arenas.

Addressing these challenges requires a multifaceted approach, including easing regulatory pressures, enhancing financial support mechanisms, and championing the UK as a prime destination for electronic music. Encouraging community engagement, bolstering electronic music education, and tackling issues of gentrification and redevelopment are crucial steps towards sustaining the industry's growth and vibrancy. The appointment of a nighttime advisor could serve as a bridge between the government and the sector, ensuring the unique needs and potential of the electronic music industry are fully understood and supported.

In essence, while the UK's electronic music scene faces its share of challenges, the opportunities for growth, innovation, and community enrichment are abundant. By adopting targeted support measures and fostering a nurturing environment for the industry, the UK can continue to harness the economic, cultural, and social benefits of electronic music. The path forward for electronic music in the UK is not without obstacles, but with concerted effort and strategic support, its future remains as promising and impactful as ever.

*GENTLE REMINDER: We measured everything we could (see above!) and came up with great stats for the electronic music industry's measurable impact. But there is so much more that we can't measure now. SO MUCH MORE. We described this and brought it to life with academic studies and a wealth of personal experiences from industry professionals and artists. So don't *only* read the stats. Check out the chapters on electronic music's influence on popular culture and communities as well as the chapter on Education and beyond, to find many more inspiring stories about the industry's impact that couldn't (yet) be measured.*

Appendix I: Case studies

In addition to the case studies shared in the core of the report, we present here many more insights and lessons learned in our discussions with people from across the world of UK electronic music. In this section, we've written up what we heard from the interviews we've done. And we've tried to capture the perspectives of each interviewee as closely as possible! We hope this is useful as a repository of information and insights.

Norwich's Electronic Music Scene from Levi de Belgeonne

Case Study: Norwich's Electronic Music Scene

What we heard from Levi de Belgeonne, Events Manager and Brand Consultant (Norwich, Norfolk)

The Uniqueness of Norwich

Norwich, a small yet vibrant city with a population of about 250,000, boasts a significant independent spirit. Its similarity to Brighton, with charming lanes and a robust art school presence, give it a rich culture. Notably, the University of East Anglia lies just outside the city, adding to its atmosphere. The city is adorned with a beautiful theatre, highly supported, and multiple music venues like the LCR and the Waterfront, catering to various genres from rock to alternative.

Gonzo's Two Room: A Hub of Diversity and Inclusivity

In the midst of this cultural diversity lies Gonzo's Two Room, a 200-capacity club that has rapidly become a cornerstone of Norwich's dance music landscape. And is recognised nationally. Its commitment to inclusive and diverse programming is a beacon of progress in a city predominantly white. "We work with lots of different people in the community, supporting local DJs, giving them a chance to support big headliners," says Levi. The club, a real grassroots venue, not only showcases big names in the electronic music scene but also fosters local talent, providing a platform for emerging DJs and artists.

Challenges Faced by the Electronic Music Scene

Despite these strides, the electronic music scene in Norwich faces significant challenges, particularly from the local council and licensing authorities. "Electronic music is not supported here by our police, licensing or council. There's been a constant fight. The council and licensing struggle to understand the value of electronic music and dance music," says Levi. There's a noticeable lack of understanding and appreciation for the genre, which is evident in the limited support and recognition from local institutions. This oversight hinders the potential growth of the scene and stifles the development of new venues and events.

The Economic and Cultural Impact of Electronic Music

Electronic music is not just about entertainment; it's a driver of economic growth and cultural diversity. Venues like Gonzo's Two Room play a pivotal role in job creation, tourism, and revenue generation. They breathe new life into the city, transforming it into a destination for music enthusiasts from across the UK. However, this potential is often overlooked by local authorities, who fail to see the broader benefits of nurturing such a vibrant music scene.

The Vision for the Future

The ultimate goal is to foster a more inclusive and diverse music environment, where electronic music is celebrated and supported just like other genres. The vision is to see Norwich not only as a hub for arts and theatre but also as a prominent destination for electronic music. This requires a shift in perspective from the local council and the community at large, recognising the value and impact of electronic music on the city's cultural and economic landscape.

Conclusion: A Call for Recognition and Support

The case of Gonzo's Two Room in Norwich exemplifies the struggles and triumphs of the electronic music scene in smaller UK cities. It highlights the need for broader recognition and support from local authorities and communities. Embracing electronic music can lead to significant cultural and economic benefits, enriching the city's cultural fabric and positioning it as a leading destination for diverse musical experiences.

Youth Engagement in Electronic Music from Pete Jordan

Case Study: Initiating the Next Generation into Electronic Music

What we heard from Pete Jordan, Director / Founder of Weird Science & MADE Festival

The Growth of 16+ Events

Over the last few years, the real area of growth for me has been events for 16 and 17 year olds, referred to as "16 plus events." I think in the past couple years we've started to develop a gold standard for running these events properly and safely.

They can be very challenging to organise because even though the young people absolutely love electronic music, they're inexperienced. Getting them into venues and keeping things orderly is difficult. But as a barometer for where dance music is heading, there's huge interest from younger age groups while the average club-goer age isn't dropping.

The Complexities of Safety and Organisation

These events require extensive risk assessments, licensing conditions, security, welfare staff and medics. We have enclosed 'Challenge 25' bars. We don't let older people attend alone due to safeguarding concerns. So they are complex and expensive compared to typical club nights.

But we treat the young people like adults and give them the full clubbing experience with high production values and energy. They don't sell alcohol but sell out because they're such high quality events.

Culturally Important and High Energy

I genuinely think these 16+ events are culturally vital. They educate young people in dance music etiquette and culture. Rather than first trying clubs at 18 or 19 with no experience, they build that experience from 16 in a safe environment.

The music is quite experimental as we're seeing shifts towards fresh underground sounds. And the sheer energy and enjoyment of these youngsters is infectious - they consume the events with such joy and energy!

Initiating the Next Generation

So at a time when the 18-21 crowd are missing from clubs, 16+ events give the next generation an initiation into club culture. For dance music to keep evolving, we need to engage kids early and spark their passion. That's why working with NTIA on best practice for these events is so important to me. They're the future of electronic music in the UK!

The Evolution and Impact of UK Electronic Music from Duncan King, Skiddle

Case Study: The Evolution and Impact of UK Electronic Music

What we heard from Duncan King, Head of Festivals & Partnerships, Skiddle

Skiddle's Influence in the Electronic Music Scene

Skiddle, a prominent player in the UK's electronic music landscape, stands out with its impressive track record. As an independently owned entity, it's a significant force in the festival scene, managing over 300 festivals, selling 1.3 million tickets, and attracting 8 million people in search of tickets – a 50% increase year on year. Their commitment to independence and collaboration with independent partners echoes the ethos of the electronic music industry.

Trends in Young Audiences: Changing Preferences Among the Youth

A notable trend among 18 to 24-year-olds is their shift towards attending fewer events but opting for more premium experiences when they do. This 'premiumisation' indicates a reduction in the role of events in their lives, yet an increased emphasis on quality over quantity. This generation places a high value on gym memberships, suggesting a significant shift in lifestyle and priorities. As universities welcome students who have not experienced pre-COVID life, it will be interesting to see how these trends evolve.

“... 18 to 24-year-olds are going to fewer events but spending more per ticket for premium experiences. Health and fitness is a high priority for this demographic too - and this has had a major effect on going out ...”

Shifts in Older Demographics: The Resurgence of Over-40s in the Scene

A fascinating development is the emergence of events catering to the over-40 demographic. This group, now free from parenting duties, is spending three times more per head than their younger counterparts, seeking quality and unwilling to settle for mediocre experiences. This trend again underscores the theme of premiumisation across different age groups.

Challenges for Regional Venues and Operators: Adapting to New Realities

The landscape is particularly challenging for regional venues and those not operated optimally. The expectation for high-quality events has risen, partly influenced by post-COVID shifts where festivals set a new benchmark for event experiences. Good operators are surviving by adapting and innovating, working 30% harder to achieve similar results. Venues can no longer afford to be dormant for part of the week; creative use of space for community outreach or workshops is becoming essential.

The Need for an Ecosystem in Music: Building a Sustainable Pyramid of Music

Drawing parallels to the aftermath of a disappointing Olympics performance by the UK, there's an urgent need to invest in the grassroots of the music industry, as the UK did in sports. In music, the top of the pyramid is flourishing, but it's crucial to support the base to ensure a healthy ecosystem. Every successful promoter and operator began small, highlighting the necessity of nurturing new talent and venues. The introduction of a ticket levy, contributing to a Pipeline Investment Fund, is a step towards supporting grassroots venues.

“... All of this will disappear unless it's protected. You have to have that ecosystem, that pyramid of music, to support the people at the bottom ...”

Electronic Music's Cultural Significance: Embedded in Culture, Evolving with Time

Electronic music remains a vital part of UK youth culture. We are witnessing a revival of 90s electronic sounds, originating from Scotland and the Northeast, reflecting the uncertain times we live in. This resurgence signifies electronic music's deep-rooted position in the cultural fabric and its capacity to evolve and resonate with societal changes.

The State of UK Electronic Music from Carl Loben, DJ Mag

Case Study: The State of UK Electronic Music

What we heard from Carl Loben, Editor-in-Chief, DJ Mag

Evolution from Underground to Mainstream

Electronic music has undergone a remarkable evolution in the UK over the past 20 years, transitioning from an underground phenomenon to a hugely popular mainstream genre. What was once dismissed as fringe or niche has become a cultural and economic powerhouse rivalling stalwarts like rock and hip-hop. This shift reflects the sound's widespread appeal and adaptability.

"... Time was when electronic dance music was thought of as a bit of a joke by the mainstream music industry ..."

The Ascent of Festivals

Festivals have played a pivotal role in exposing new audiences to electronic music and providing a platform for emerging talent. Events like Glastonbury now dedicate major real estate to electronic acts, while specialist festivals continue to thrive. This festival ecosystem nurtures artistic growth and drives the genre's commercial success.

A New Generation's Relationship with the Scene

The latest generation engages with electronic music differently than their predecessors. Sober and daytime events are gaining traction, speaking to changing lifestyle preferences. This ability for the scene to stay relevant and exciting for each new cohort has been essential to its continued ascendancy.

Supporting the Lifeblood of the Industry

Small underground venues are where new genres emerge and subcultures are born. From jungle to grime to UK garage, localised incubators have been intrinsic to the UK's influence. There are growing fears that venue closures from rising costs could stifle future innovation. Protecting these grassroots communities through governmental support and recognition is imperative.

"... There needs to be small places for music to develop and artists to be given the room to grow ..."

Quantifying a Vibrant Industry's Value

Beyond its cultural contribution, electronic music also delivers considerable economic impact through job creation, tourism, and tax revenues. A comprehensive understanding of this commercial footprint could galvanise greater infrastructure investment and policymaker attention. By supporting its diverse talent pipeline, the UK can safeguard the scene's health and its status as a global tastemaker.

The future remains bright for British electronic music, buoyed by a rich heritage of pioneers and the infrastructure to nurture the next generation. With the genre now firmly ensconced in the mainstream consciousness, the priority must be sustaining the conditions for subcultures to thrive at the local level. The UK scene's continued vitality hinges on protecting the underground crucibles where innovation is born.

The Need for Recognition and Support

A crucial issue facing the UK electronic music scene is the need for governmental recognition and support. Drawing inspiration from countries like Germany and the Netherlands, the UK government should acknowledge electronic music

as a legitimate cultural art form. This recognition is vital for securing funding and support for artists, venues, and the broader industry.

"... I believe the UK government should view electronic music as a legitimate cultural art form, similar to how Germany or Holland does ..."

The Cultural Significance of Electronic Music by David Martin, Featured Artists Coalition

Case Study: The Cultural Significance of Electronic Music

What we heard from David Martin, CEO, Featured Artists Coalition (FAC) and Board Member; Independent Venue Week

Electronic music is now deeply embedded in the cultural fabric of the UK. It has become part of our national identity. What electronic music means, and the range of genres it encompasses, has grown exponentially over time. And the techniques and approaches have spread far beyond the traditional dance music genres we might have associated with electronic music in the past. Electronic music has now firmly entered the mainstream.

This mainstream adoption presents opportunities. Young people today tend to have very diverse musical tastes, rather than a narrow focus on specific genres we may have seen in the past. There is a rich amalgamation of cultures, styles and sounds from places like Latin America and Africa that now influence electronic music in the UK. The downside, potentially, is that some lack a deeper connection or loyalty to any one particular genre. Overall though, the accessibility of streaming has bred wonderfully eclectic musical palettes.

Revisiting Counterculture

In the 1980s, the electronic music movement in the UK was countercultural. As we reflect on its historical significance, it deserves to be spoken about in the same vein as punk, rock and roll and other revolutionary genres. Electronic music encapsulates a core part of the British tendency to break the mould and challenge the status quo.

Today, the very meaning of counterculture may be shifting in the digital era with music so omnipresent. But this presents an opportunity to refocus attention on electronic music's counter cultural significance, which I feel is overlooked and underappreciated, especially amongst policymakers.

Performance and Innovation

If we look at the charts today, many of the top hits would be considered dance or electronic music. We're starting to see the envelope pushed with live performances moving beyond DJ sets. However, this evolution is happening at the very same time touring is becoming extremely difficult in the UK.

Rising costs and barriers like post-Brexit bureaucracy make touring more expensive and complex to organise. This restricts the freedom for electronic artists to experiment with their live show formats. The challenging climate has arrived just as people are trying new things beyond traditional DJ sets. These circumstances present a wider problem for the music industry in 2024/2025. The barriers to domestic and international touring will limit creativity across the board and place essential cultural exchange in jeopardy.

Status and Respect

There remains a strange divide in status between clubs and music venues in the eyes of policymakers. Whilst music venues are increasingly seen as hallowed cultural centres in UK cities, clubs tend to be viewed differently. The electronic music scene - encompassing DJ culture, clubs and beyond - remains undervalued and under-respected in national conversations. It does not receive the same reverence you might find in places like Berlin.

Bridging this divide will require the electronic music community viewing itself as part of the wider music industry, not something niche, underground or separate. By engaging more with industry bodies and collective organisations, electronic music can benefit from amplified representation in the corridors of power. This unified approach will help spotlight the cultural significance of clubs, allowing them to be appreciated in the same breath as pub venues putting on live music nights.

Signs of Progress

Whilst there is still progress to be made, respect for and understanding of electronic music from policymakers has improved over the past five years. The work of organisations like the Night Time Industries Association has moved the dial, alongside influential venues like Warehouse Project embracing industry structures. At the FAC, we have made a concerted point in celebrating all types of music and being genre agnostic in all of our work, including our government lobbying. Electronic music can retain its countercultural edge whilst also adopting some of the formal apparatus around it for support.

Moreover, electronic music moving into more established cultural spaces demonstrates its significance. Performances at venues like the Barbican and Royal Festival Hall show electronic music transcending old boundaries. You can be subversive whilst also reaching new audiences. Perhaps electronic music has now matured to a point where it does not have to sell its soul or compromise its alternative ethos through greater recognition. Its expanding presence across the cultural landscape highlights the embedded importance of electronic music in the UK today.

Electronic Music as Social Glue and Therapy from Brandon Block

Case Study: Electronic Music as Social Glue and Therapy

What we heard from Brandon Block, Motivational Thought Coach at Happy Days For Everyone and DJ

The Fundamental Need for Celebration

Electronic music, in essence, represents a fundamental human need – a need to release, to escape, to celebrate. It's about creating a space that is truly our own. From the pulsing nightclubs to the dynamic festivals, every beat and rhythm resonates with our intrinsic desire to connect and to express ourselves. This need for celebration and release is not a modern invention. It traces back to our earliest history, from the times of the Romans and even before. Every society has found its way of celebrating, be it through mead, wine, or dance.

The Evolution of Socialising

Our journey from pubs in the 1300s to the thriving electronic music scene today shows the evolution of our social needs. The UK, a nation historically known for its pubs and bars, has always been a hub for social networking. These places were not just about alcohol; they were about meeting people, connecting, and sharing experiences. Today, electronic music venues and festivals carry forward this legacy. They are the modern arenas of social networking, where connections are forged, and communal experiences are shared.

Coping with Modern Isolation

In the face of increasing isolation, exacerbated by events like the COVID-19 pandemic and the shift towards remote working, the electronic music scene offers a vital outlet. It's a remedy for the loneliness and mental health issues that can arise from prolonged isolation. The act of dancing and singing together in a shared space goes beyond mere entertainment; it's a form of therapy, a necessary release for many, particularly young men who are at risk of mental health challenges and suicide.

The Lure of Technology vs The Magic of Real Experience

Despite the overwhelming presence of technology in our lives – the ease of access to any form of entertainment through our smartphones – there's an irreplaceable magic in live events. Sometimes, even I, after decades in the club scene, find myself lulled into the comfort of digital entertainment. But stepping out into a live gig always reignites the realisation of what we're missing. The palpable energy of a live audience, the shared excitement, and the collective experience – these are things no digital platform can replicate.

The Evolution of the Club Scene

The pandemic has also brought about a shift in how we experience electronic music. The trend of daytime or early evening raves has gained momentum. These events cater to a broader demographic – those who seek the euphoria of a party but also value their time with family, a balanced lifestyle, and a 'good straight head'. It's a testament to the adaptability of the electronic music scene, evolving to meet the changing needs of its audience.

A Necessity, Not a Luxury

In these challenging times, with cost of living crises and global uncertainties, it's essential to recognise that going out and immersing ourselves in the electronic music scene is not a luxury – it's a necessity. It's a vital investment in our mental well-being. Often, we neglect to invest in ourselves, but spaces where we can let go, dance, and be with others are fundamental to maintaining a healthy state of mind.

Electronic Music: A Beacon of Happiness

Electronic music is more than just a genre; it's a beacon of happiness and a catalyst for mental health. The joy and community it brings have the power to permeate all aspects of life. In times of crisis, be it the cost of living or climate,

finding happiness through music becomes even more critical. It's not just about escapism; it's about finding a space where we can genuinely be ourselves, where we can connect with others and feel a part of something greater.

The UK's Proud Legacy

We, in the UK, have a legacy to be proud of – a legacy of creating and evolving various music genres, including electronic music. Our clubs, DJs, and the sounds we've developed resonate globally. This isn't just a part of our culture; it's a fundamental aspect of our living. It's something we not only enjoy but also truly deserve.

The Future of Electronic Music

As we look to the future, we must recognize the value of the electronic music scene, not just as an industry but as an integral part of our societal fabric. It's about supporting this vibrant culture, ensuring its survival and growth, particularly during challenging times. The government and industry stakeholders must acknowledge the vital role of electronic music in our lives and support its continued prosperity.

Conclusion

Electronic music is more than just sound; it's the heartbeat of our nation, a unifying force that transcends age, background, and circumstance. It's a reminder that in a world increasingly mediated by screens and digital experiences, the true essence of living often lies in the shared, pulsating rhythms of a dance floor, in the heart of the UK's vibrant electronic music scene.

The Pulse of Electronic Music from Sunil Sharpe

Case Study: The Pulse of Electronic Music

What we heard from Sunil Sharpe, DJ and Artist

Sunil Sharpe, a DJ, artist, educator and advocate for the electronic music scene from Dublin, offers a unique perspective on the industry. As a seasoned teacher and pioneer of Ireland's first full-time DJ course, his insights provide valuable lessons and reflections on the state of UK electronic music.

"... There's a mismatch between governments wanting vibrancy in their neighbourhoods, but not valuing the venues which create it. ..."

The Elephant in the Room: Electronic Music's Underestimated Impact

Electronic music, often overlooked yet significant, can be likened to an "elephant in the room." Its substantial yet frequently disregarded presence in the cultural and economic landscape mirrors this analogy. This genre, especially in the UK, plays a pivotal role in shaping not just musical trends but also societal norms.

"... Electronic music is almost an elephant in the room, huge but often disregarded ..."

The Teaching Perspective: More Than Just Music

For nearly two decades, Sunil has broadened the scope of his teaching, transcending beyond mere DJing or music production. His comprehensive one-year course encompasses event production and promotion, reflecting the multi-faceted nature of the industry. This holistic approach underlines the need for diverse skills in navigating the electronic music landscape.

Venue Vulnerability: The Core Challenge

A key concern highlighted by Sunil is the vulnerability of music venues and infrastructure. The survival and maintenance of these spaces are crucial for the industry's health. These venues are not just entertainment spots but incubators for talent and innovation. Their decline signifies a significant threat to job prospects and the industry's future.

*"... The biggest issue is the vulnerability of venues and infrastructure...
Will venues sustain, exist, and maintain? ..."*

The Dilemma of Commercialism versus Creativity

Venues, even those that survive, often sacrifice creative and pioneering music at the altar of commercial viability. This shift towards a more commercial approach diminishes the essence of electronic music, which thrives on innovation and artistic freedom.

*"... Venues are shaving off the creative, the pioneering music
in favour of more commercial decisions ..."*

The Accelerated Path to Fame: A Double-Edged Sword

The diminishing middle ground of small to medium-sized venues has led to a quicker ascent from warm-up slots to festival stages. While this might seem beneficial for artists, it actually bypasses critical developmental stages. Upcoming acts need these platforms to hone their skills and gain exposure.

Headliner Culture: The Unhealthy Imbalance

Booking policies now lean heavily towards securing big names, sidelining local and emerging talent. This 'headliner culture' has created an imbalance, where the success of an event hinges on star power rather than fostering a diverse array of artists.

*"... Many people won't do events without large headliners now,
but that means we're not showcasing upcoming and local talent ..."*

Decentralising Dance Music: A Call for Diversity

Sunil emphasises the need to decentralise dance music. Moving away from major cities and clubs dominating the scene, he advocates for a more distributed and inclusive approach. This shift is essential for nurturing local talent and ensuring the genre's vibrancy and longevity.

A UK Success Story: Agents of Change Policy

The UK's 'Agents of Change' policy stands as a beacon of positive change. This planning policy addresses the conflict between music venues and residential development, placing the onus on developers to mitigate noise issues. This policy, spearheaded in the UK and adopted in Dublin, exemplifies a proactive approach to preserving electronic music venues.

Conclusion: The UK's Leading Role and Future Prospects

The UK, historically a leader in the global music scene, faces challenges in maintaining its vibrant electronic music landscape. Yet, initiatives like the Agents of Change policy show that positive steps are being taken. As the industry evolves, it's crucial to balance government interests with the need to preserve and promote electronic music's rich heritage.

The View from UK Music from Tom Kiehl

Case Study: Amplifying the Beat of UK Electronic Music

What we heard from Tom Kiehl, Interim CEO, at UK Music

Tom Kiehl of UK Music, brings a unique blend of policy expertise and passion for all music genres to the forefront of discussions on electronic music's place within the UK's broader musical ecosystem. His advocacy for the genre shines a light on the intricate balance between technology and artist rights, illustrating the dynamic interplay of innovation within electronic music.

Bridging Worlds: The Synergy of Technology and Tradition

Tom articulates a compelling vision where electronic music acts as a bridge between cutting-edge technology and traditional musical forms. He draws parallels between electronic composers and classical music's giants, positioning electronic artists as today's pioneering figures reshaping the musical landscape.

"... Electronic music acts as a bridge between cutting-edge technology and traditional musical forms, embodying the spirit of modern innovation much like the classical composers of yesteryear ..."

The Perception Gap: Challenging Stereotypes and Government Bias

One of Kiehl's critical observations is the discrepancy in governmental support for different musical genres. He critiques the enduring biases that have historically favoured classical music over more contemporary genres like electronic. By advocating for a reevaluation of these predispositions, Kiehl aims to foster a more inclusive understanding of electronic music's cultural and social contributions.

"... There's a significant discrepancy in support from the government for different musical genres, with a noticeable bias that has historically placed classical music in a more favourable position ..."

Youth and Music: A New Digital Renaissance

Kiehl reflects on the evolving relationship between young people and music, underscored by the digital revolution. This transformation has not only democratised access to music but also diversified the ways in which young audiences engage with and appreciate the vast spectrum of musical genres, including electronic.

"... The digital age has transformed how young people engage with music, offering unprecedented access and reshaping their musical preferences towards a more diverse and inclusive range ..."

A Call for Support: Protecting Venues and Promoting Diversity

The survival of electronic music is intrinsically linked to the venues that house it, according to Kiehl. He underscores the urgent need for protective measures against the challenges these spaces face, from local authority licensing hurdles to the broader economic pressures of urban development. Furthermore, Kiehl champions the cause for greater diversity within the industry, a move he believes will drive innovation and ensure the genre's vitality.

"... The survival of electronic music is deeply intertwined with the fate of music venues, highlighting the necessity for protective measures and support in the face of local authority licensing challenges and urban development ..."

"... Promoting diversity within the electronic music industry is crucial for fostering innovation and ensuring the genre's continued vibrancy and relevance ..."

The Future Soundscape: Envisioning a Thriving Electronic Scene

In conclusion, Tom Kiehl's perspective offers a forward-looking view on the UK's electronic music scene. By addressing existing challenges and leveraging opportunities for innovation and inclusivity, he envisions a thriving ecosystem where electronic music continues to inspire and influence across boundaries. His insights not only underscore the genre's artistic depth but also its potential to foster community and drive cultural evolution.

Rhythms in Flux: Navigating the Future of UK's Electronic Music Festivals from Samantha Parsley

Case Study: Rhythms in Flux: Navigating the Future of UK's Electronic Music Festivals

What we heard from Samantha Parsley, Professor at University of Portsmouth and Founder of In the Key.

The Festival Landscape: Challenges and Opportunities

In recent times, the electronic music scene in the UK has faced significant challenges, particularly in the festival landscape. While some may argue that the market is oversaturated, leading to a necessary 'shakeout', the real issue lies deeper. The festivals that are struggling or taking a hiatus tend to be the very platforms where grassroots electronic musicians find their voice and audience. These events are more than just entertainment; they are crucial stepping stones for emerging artists. The closure of small music venues across the country has only exacerbated this problem, raising concerns about where the next generation of electronic musicians will find opportunities to perform and grow.

“... Festivals are under fire. The ones that are struggling tend to be where grassroots electronic musicians get their opportunity to play live ...”

The Economic Impact and the Shift in Music Consumption

The electronic music scene is not just culturally significant; it's an economic powerhouse. However, the current cost of living crisis has impacted this industry as well. My involvement in organising a community festival highlighted the struggles events that run on 'love' (aka free labour) face due to financial constraints. Larger festivals are also under pressure, with some, like the Noisily Festival, having to cut stages that were meant to showcase emerging talent. This contraction in the festival scene has ripple effects on the diversity and richness of the music offered.

Moreover, there's a notable shift in music consumption patterns. The rise of platforms like Spotify has led to a trend where tracks are becoming shorter, driven by the economics of streaming algorithms. This shift might be subtly altering the kinds of artists and genres that gain popularity, raising questions about the future direction of electronic music.

“... If you can make your track all guns blazing right from the beginning, it's more likely to be played for the required amount of time to register as a stream ...”

Diversity in Electronic Music: A Fragile Agenda

One of the most concerning trends in the current downturn of the electronic music industry is the impact on diversity. Historically, when economic pressures mount, diversity initiatives are often the first to be sidelined. This is apparent in the electronic music scene as well, with festivals like Noisily (noted above) having to cut stages that were planned as showcases for a diverse range of artists. These stages are crucial for giving a platform to underrepresented groups in the industry.

“... Noisily Festival had to axe their emerging artists' stage last year. A lot of the acts appearing on that stage were women. They lost that golden opportunity to be visible ...”

The argument often heard is that diversity doesn't sell tickets or that it's too risky to book non-mainstream artists. This mindset can perpetuate a cycle where only established names get opportunities, stifling the growth of new talent. As the

industry faces economic challenges, there's a real risk that progress made in terms of diversity and inclusion could be undone.

*“... When things get tough, diversity is the first to go.
It's really hard to argue with the economic imperative ...”*

The Way Forward: Investing in the Future

Despite these challenges, the electronic music scene in the UK holds immense potential. To ensure its growth and sustainability, it's crucial to look beyond immediate economic pressures and invest in the future. This means supporting grassroots venues and festivals, encouraging diverse talent, and adapting to changing consumption patterns without losing the essence of what makes electronic music unique.

The role of education in this sector cannot be overstated. Building a strong platform for learning and development will help secure the future of this industry. It's about creating a balanced ecosystem where emerging artists have the space to grow, and where diversity is seen as an asset, not a liability.

In conclusion, the electronic music scene in the UK is at a crossroads. It's a vibrant, dynamic industry with the potential to continue being a global leader in music. However, to achieve this, we must address the current challenges head-on, with a focus on long-term sustainability and inclusivity.

The Evolution of Nottingham's Electronic Music Scene from James Slater

Case Study: The Evolution of Nottingham's Electronic Music Scene from James Slater

What we heard from James Slater, Venues & Operations Manager, Nottingham Trent Students' Union & The Level

Nottingham, once a stronghold for legendary band-focused music venues, has witnessed a remarkable transformation. Embracing electronic music has not only rejuvenated its nightlife but also offered economic sustainability and a richer community experience.

Grassroots Music Venues: Adapting to Survive

Fifteen years ago, Nottingham's music scene was dominated by live bands. Today, these grassroots venues have diversified, incorporating DJs and electronic music nights. There are decks behind almost every door. This shift has proven economically beneficial, attracting a wider, more diverse audience. Unlike band-centric events where audiences remain static, electronic music fosters social interaction as attendees move around the venue, socialise, and engage more with the space – and consequently, spend more at the bars.

“... By moving to electronic music, venues actually build more of a community. People are more likely to meet other people, chat with people and build relationships with people at club nights. With electronic music, people are all over the venue ... constantly rotating around the club ...”

Enhanced Experiences: The Role of Production and TikTok

In recent years, electronic music events in Nottingham have significantly upped their production value. Influenced by platforms like TikTok, there's a growing expectation for visually striking and immersive experiences. This trend has spurred competition among clubs and promoters, leading to a vibrant scene filled with high-quality, engaging events.

“... TikTok feels like an exciting new marketing tool to promote the scene... driving more people into the scene ...”

Educational Influence: Nurturing Future Talent

Nottingham's music scene owes much of its vibrancy to educational institutions and student initiatives. Colleges offering courses in music production, DJ academies, and student-run societies provide essential platforms for emerging artists and promoters. This educational backbone not only nurtures talent but also continually injects fresh energy into the scene amongst iconic homegrown talent

The Economic and Cultural Impact

The shift towards electronic music has not only impacted the economic landscape but also the cultural fabric of Nottingham. Prominent local artists and large-scale events, like arena-scale electronic music concerts and local festivals, underscore the genre's growing importance. This has led to a broader acceptance and understanding of electronic music, even at the civic level, with councils and licensing being more open to hosting such events.

Challenges and Adaptations

However, this thriving scene faces its own set of challenges. The cost-of-living crisis has led to a change in nightlife habits, with people choosing fewer nights out. The lingering effects of COVID-19 have disrupted the traditional student introduction to the nightlife, impacting the scene's dynamics. Yet, in the face of these challenges, Nottingham's electronic music scene remains resilient, adapting to these changing circumstances with innovation and a strong community spirit.

Conclusion: A Resilient and Flourishing Scene

Despite economic and social challenges, Nottingham's electronic music scene stands out as a beacon of adaptability and vibrancy. From grassroots venues evolving to meet new demands to the educational sector fuelling fresh talent, the city

shows how embracing change can lead to a flourishing music ecosystem. As electronic music continues to grow in cultural significance, Nottingham's model offers valuable insights for other towns and cities.

The Impact of Electronic Music on Mental Well-being from George Taktak

Case Study: The Impact of Electronic Music on Mental Well-being

What we heard from George Taktak, Founder & CEO, How Mental

The concept of mental health has undergone a significant transformation. Previously viewed as a concern only for those with specific disorders, it now encompasses a broader spectrum. This shift in perception highlights an essential truth: mental well-being is relevant to everyone, as we all possess a mind.

The Challenge: A Reactive Healthcare System

Our healthcare system, primarily reactive in nature, struggles to meet the growing acknowledgement of mental health needs. Many therapies offered are limited, often providing only short-term solutions. This approach fails to address the underlying issues, leaving a staggering 70% of individuals who seek help without adequate support.

The Hidden Costs of Neglected Mental Health

The financial implications of unaddressed mental health issues are profound, echoing through workplaces and communities. Losses in productivity, staff turnover, absenteeism, and 'presenteeism' (being physically present but unproductive) translate into billions in costs. These figures underline the urgency of addressing mental well-being comprehensively.

Electronic Music: A Gateway to Expanded Perspectives

Electronic music transcends conventional boundaries, offering a liberating and inclusive experience. It challenges traditional norms, encouraging listeners to explore wider perspectives. This genre, especially when infused with AI and innovative compositions, serves as a powerful tool for mental wellness.

*"... Electronic music in itself, like, widens the awareness and widens the possibility ...
It clearly has a very liberating feature to it ..."*

The Club Experience: A Sanctuary of Expression and Connection

Nightclubs, often misconceived, play a crucial role in fostering safe spaces for self-expression and human connection. They offer an environment where individuals can transcend their daily roles and responsibilities, connecting with others on a profound, non-verbal level. The unique experience of electronic music in these settings promotes a sense of freedom and inclusivity, which is crucial for mental well-being.

The Power of Dance: Physical and Mental Health Interlinked

Dancing, a central element of the clubbing experience, has tangible benefits for both physical and mental health. Documented studies show its positive impact on a variety of groups, from the elderly with dementia to young people, enhancing their career prospects. The physical act of dancing not only improves physical health but also contributes significantly to mental wellness.

Conclusion: Electronic Music as a Cultural and Mental Health Catalyst

In conclusion, electronic music and the clubbing scene are more than just entertainment; they are vital components of our cultural fabric and mental health landscape. By understanding and embracing the role of electronic music in mental well-being, we can begin to address the broader challenges of mental health in our society.

The Evolution and Future of the UK Electronic Music Scene from Billy Mauseth

Case Study: The Evolution and Future of the UK Electronic Music Scene

What we heard from Billy Mauseth, Director, Brighton Music Conference

Billy has been entrenched in the electronic music scene for over three decades, witnessing its transformation from an underground movement to a recognised business powerhouse. Reflecting on the past, he says, “We were often dismissed as hobbyists, really”, but today, electronic music is a vital part of the UK's economy, contributing significantly.

The Changing Landscape

The scene's evolution is most evident in the attitudes of the younger generation. Electronic music used to be a niche passion, but today's youth view it as a legitimate career path. This shift is supported by the availability of college courses, mentorship schemes, and conferences, which were non-existent for previous generations. Billy says it's inspiring to see this level of support and knowledge transfer from the older generation to aspiring DJs and producers.

Club Culture: Then and Now

Clubbing has undergone a drastic change. In the past, clubs were sanctuaries of music where DJs were revered, and the dance floor was a place of pure musical immersion. Now, the dynamics have shifted. There's an overwhelming number of DJs, and the focus seems to have moved from music to social appearances, driven partly by social media. This has somewhat diluted the pure musical experience we cherished.

The Vicious Cycle of Venue Decline

An alarming trend is the closure of venues. As venues shut down, fewer people experience the unique club atmosphere, leading to further closures. It's a vicious cycle. Moreover, the escalating costs of running venues have made it increasingly challenging. Billy experienced this challenge while juggling a conference, a master's degree, and running a venue, leading to his eventual withdrawal from the club management scene.

Professionalism and Its Pitfalls

The professionalisation of the industry has been a double-edged sword. On one hand, it has brought recognition and structure, but on the other, it's stifling the underground spirit. This is particularly evident in dealing with agents, who often prioritise financial gains over the sustainability of grassroots venues.

A Resurgence in Grassroots Movements

Yet, there's a silver lining. The pushback against this over-professionalization is fostering a resurgence of DIY events and grassroots initiatives. These events, often free and focused on resident DJs, are gaining popularity. They represent a return to the roots of electronic music, where community and passion reign supreme.

The Role of AI in Shaping the Future

Looking ahead, artificial intelligence presents exciting possibilities. It's set to revolutionise various aspects of the industry, from marketing to graphic design. AI could democratise creativity, offering tools for those who might not have had access or skills before.

Conclusion: Adapting and Evolving

The UK electronic music scene is at a crossroads. As we navigate challenges like venue closures and the changing club culture, there's a growing emphasis on community and grassroots initiatives. The rise of AI offers new avenues for creativity and efficiency. Embracing these changes, while staying true to our roots, is key to sustaining and growing the vibrant and diverse electronic music community in the UK.

The Interplay of Electronic Music and Societal Trends in the UK from David Selby

Case Study: Cultural Currents: The Interplay of Electronic Music and Societal Trends in the UK

What we heard from David Selby, CEO, Resident Advisor

Cultural Influence: "How has UK electronic music continued to shape or reflect broader cultural trends and attitudes within the country this year?"

The infiltration of electronic music into the mainstream is well documented. I'm more interested in the reverse. How the wider societal challenges we're facing are influencing electronic music. Hard dance is having a moment, and it's difficult not to view this as a reflection of the challenges posed by the post-pandemic cost of living era crisis or general shit political situations we have across the Western hemisphere. It feels like there's a collective need to release energy and frustrations that have accumulated during the general malaise of shitness that young people have to contend with now. The nature of this music provides a unique offering to kids for a cathartic experience.

Furthermore, there has been a notable shift in focus towards local artists as the fees for international talent become out of reach for a lot of promoters. This can have a positive halo effect on local scenes as the support for homegrown talent not only contributes to the local economies but also ensures that resources circulate within the local community, fostering a sense of interconnectedness and resilience.

Challenges and Resilience: "What have been the primary challenges facing the UK electronic music scene in 2023, and how has the industry adapted or shown resilience?"

To be honest, see below, but it's mostly about money. Our venues are threatened due to rising costs. Our artists are under threat as the economic situation in the country and industry is incredibly challenging. I'm not saying it's impossible to make it work, but it's just really hard, and it's getting harder.

Government Support: "From your perspective, what kind of support or recognition would be most beneficial from government bodies to further strengthen the UK electronic music scene?"

From a recognition perspective, I feel like a broken record on this one, but the UK has a terrible track record of protecting nightclubs from development or closure. Some of our nightclubs have been around for decades and are hugely important to the culture of our towns and cities. They need to be recognised as the institutions of cultural heritage that they are. Berlin has led the way on this, and we should follow suit.

Regarding support, that's easy. They need money. Whether that's in the form of Rate reductions, VAT, or other tax breaks. The margins are becoming incredibly thin, and the current economic situation is making it worse. Running nightclubs, particularly the smaller dancefloors that are so crucial to artist development and the cultivation of new sounds and creativity is under threat. No one is getting rich running these venues, and the government and councils should recognise this before they become extinct.

Global Positioning: "How does the UK's electronic music scene currently compare on a global scale, and what factors contribute to its unique position or influence?"

From where I'm sitting, the UK has one of, if not the most significant and diverse electronic music scenes in the world. Our platform does index towards the UK market, it is home, however the volume of events, particularly in London, is higher than anywhere else in the world. From a diversity perspective, as you might expect, House and Techno are the two most popular genres on our platform. Globally, they represent around 40% of all events; however, in the UK, it's only 30%, with a big representation of scenes like DnB, Jungle, Bass and Garage.

Why is this? I believe the best thing about our country is its diversity. Our music scene is a pure reflection of this.

A Global Perspective on UK's Electronic Music Scenes from Diana Raiselis

Case Study: A Global Perspective on UK's Electronic Music Scenes

What we heard from Diana Raiselis, Research Lead, VibeLab / Nighttime Researcher

The UK, known for its vibrant and diverse electronic music culture, offers a wealth of lessons and insights that can be applied globally. For external observers, a few aspects of the UK's electronic music scene stand out. They not only contribute significantly to the culture and economy but also provide starting impulses for other regions to develop their nightlife economies sustainably and inclusively.

The Agent of Change Principle

One notable feature in the UK's approach to nightlife is the 'Agent of Change' principle. This innovative concept, also adopted in other parts of the world, holds that any new development in a neighbourhood is responsible for managing its impact on existing establishments in the area (including venues and clubs). As neighbourhoods grow denser, it's important for the coexistence of residential and nighttime spaces.

"... The developer that wants to build apartment buildings next to an existing club, for example, needs to be responsible for ensuring that it's habitable for residents ..."

Attending to the Night

The UK has a notable history of research and attention to the night—not only the nighttime economy, but the role of nightlife in subcultural scenes and cultural industries, and the experiences and needs of night workers. These focuses have given rise to roles dedicated to night-time advocacy and governance that emphasise not just the economic but also the social and cultural value of nightlife.

Preserving Queer Spaces

A critical issue highlighted in UK research and policy is the disappearance of queer spaces. This challenge is not unique to the UK but is a global concern. The emphasis on protecting these spaces is crucial, as they are often the birthplaces of significant cultural and musical movements, especially in electronic music genres and scenes.

The Night Test

The 'Night Test' policy, forthcoming in London, is another pioneering initiative. This approach calls for every policy to be evaluated through the lens of its impact on the nighttime economy, ensuring that nocturnal activities are considered in urban planning and development.

Case Management for Threatened Spaces

With initiatives like the Culture and Community at Risk Office, the UK has some structures of case management systems for spaces facing threats, especially those important to underrepresented communities. This proactive stance on protecting cultural and social venues is commendable and a practice that other cities could adopt.

Access to Transit

The focus on improving transit access for nighttime workers in the UK is a significant step towards economic and social inclusivity. By working towards more reliable transportation for nighttime workers, the UK is acknowledging and supporting a crucial segment of the economy.

Reframing Drug Policies

As a result of longstanding advocacy by many different actors, the UK is seeing a slow shift from punitive approaches to drug use in electronic music settings to harm reduction strategies, such as increasing offers of drug-checking services. This approach is more compassionate and effective, focusing on safety and health rather than punishment.

Viewpoint on Nurturing Electronic Music Talent in UK Education Systems by Ben Rapp

Case Study: Nurturing Electronic Music Talent in UK Education Systems

Introduction

Ben Rapp, representing Lancashire Music Service, sheds light on the current state of music education in the UK, with a particular emphasis on integrating contemporary music genres and technologies. This case study aims to articulate the significant strides and challenges in fostering electronic music within the educational framework, aligning with the broader economic and cultural impact of electronic music in the UK.

Background of Lancashire Music Service

Lancashire Music Service, part of Lancashire County Council, has a rich history spanning over 50 years. It primarily operates in primary schools, but also extends its services to secondary schools and specialist educational settings. The service offers a range of lessons, from individual instrumental sessions to whole-class learning experiences, with a strong emphasis on supporting schools in curriculum delivery.

"... There's definitely space in school curriculum plans for music industry units of work, and job prospects in the industry, to be more widely taught ..."

Integrating Music Technology

Recent years have seen Lancashire Music Service develop a strategic approach towards music technology. Recognising the importance of not only traditional music education but also modern music production techniques, the service has incorporated music technology into its core offerings. Key elements of this strategy include:

- Enhancing Music Technology Education: Recognising the need to keep pace with contemporary music trends, the service has prioritised music technology education. This involves teaching students essential skills like using digital audio workstations, recording, and editing music.
- Resource Allocation and Support: Schools are provided with resources like network meetings, where educators share experiences and resources. The aim is to support music teachers, particularly in secondary schools, who often operate as single-person departments.

The Current Landscape in Schools

In primary schools, the integration of music technology is patchy, often dependent on the skills of individual teachers. However, secondary schools present a different picture, with most having access to computers and music technology, though often lacking in music tech hardware.

Partnerships and Collaborations

Lancashire Music Service has formed significant collaborations, notably with Ableton, to provide music tech hardware to schools. This initiative has seen the distribution of Ableton Push 2 devices across numerous secondary schools, fostering a more hands-on experience with industry-standard equipment.

Challenges and Solutions

- **Communication and Engagement:** The main challenge lies in effectively communicating the value of these initiatives to key decision-makers in schools.
- **Resource Constraints:** Budget constraints and time limitations often hinder schools from fully embracing these initiatives.
- **Teacher Training:** Ensuring that teachers are adequately trained and confident in teaching music technology is vital.

“...You're so busy in school, you just don't have the headspace to think outside of the exam specs and school-based musical activities ...”

Looking Ahead

While the integration of music technology in education presents challenges, it also opens up a world of opportunities for students. Moving forward, more focus on informing students about the wide range of careers in the music industry, beyond performance, is crucial. As referenced in the National Plan for Music Education, new “national music hub centres of excellence” will be created in 2024 for inclusion, CPD, music technology and pathways to industry, based in four music hubs and supporting all of the other hub areas in England. This provides an opportunity to develop understanding and embed promotion of music industry employment opportunities in future school curriculums.

Conclusion

The efforts of Lancashire Music Service underscore the importance of evolving music education to include contemporary genres and technologies. While the path is fraught with challenges, the potential impact on students' engagement and skill development is immense. As electronic music continues to shape the cultural landscape of the UK, educational institutions play a pivotal role in nurturing the next generation of electronic music talent.

Appendix 2: More stats

We jammed a lot of numbers into the main report. But there's more we wanted to share. We present them here.

More cuts of our nightclub economic impact calculation

CGA by NIQ data categorises nightclub numbers and total bar takings based on their management structure, location, and geographical placement within the country, so we've also analysed the market in those dimensions, although we have not made different assumptions for behaviours on these dimensions.³²

| | 2022 | 2023 | Change | |
|--------------------|------------------|------------------|------------------|--------------|
| Managed | £364.7m | £321.3m | (£43.4m) | (12%) |
| Leased | £56.4m | £48.3m | (£8.1m) | (14%) |
| Free | £1,231.5m | £1,047.1m | (£184.4m) | (15%) |
| Not characterised* | £46.4m | £40.6m | (£5.8m) | (12%) |
| City | £1,404.1m | £742.5m | (£661.7m) | (47%) |
| Town | £165.6m | £482.8m | £317.2m | 192% |
| Small Town/Rural | £82.8m | £191.4m | £108.6m | 131% |
| Not characterised* | £46.4m | £40.6m | (£5.8m) | (12%) |
| England | £856.2m | £1,195.3m | £339.1m | 40% |
| Scotland | £569.1m | £149.8m | (£419.2m) | (74%) |
| Wales | £227.3m | £71.6m | (£155.7m) | (69%) |
| Northern Ireland* | £46.4m | £40.6m | (£5.8m) | (12%) |

³² Source: Audience Strategies analysis of REKOM's UK NIGHT INDEX and CGA by NIQ & AlixPartners Hospitality Market Monitor. Combined with updated estimates from leaders in the industry and leading industry economists.

More nightclub stats

We estimate that there are 875 clubs in the UK. A diverse range of electronic music nightclubs, ranging from small, local, and independently-run venues with a capacity of 250 people or less to global superclubs like Fabric and Ministry of Sound that can hold thousands of patrons. These venues offer a variety of electronic music genres and experiences, from intimate and underground settings to large-scale and high-energy events. The range of options available allows for a diverse and dynamic electronic music scene in the UK, catering to different tastes and preferences.³³

But we're losing them. Fast. As the below data shows.³⁴

| By Tenure | | Number of venues | | | | | | Increases (decreases) | | | | | |
|----------------------------|--------------------|------------------|---------|---------|---------|--------|--------|-----------------------|------------------|------------------|-------|----------|-------|
| | | Mar-20 | Dec-21 | Sep-22 | Dec-22 | Sep-23 | Dec-23 | Dec-23 vs Dec-22 | Dec-22 vs Dec-21 | Dec-23 vs Mar-20 | | | |
| Total GB licensed | Total | 115,108 | 106,880 | 103,682 | 102,071 | 99,916 | 99,113 | (2,958) | (3%) | (4,809) | (4%) | (15,995) | (14%) |
| Licensed Late-Night | Total | 14,106 | 13,473 | 13,304 | 13,145 | 12,728 | 12,675 | (470) | (4%) | (328) | (2%) | (1,431) | (10%) |
| Licensed Late-Night | Managed | 3,351 | 3,262 | 3,304 | 3,289 | 3,294 | 3,268 | (21) | (1%) | 27 | 1% | (83) | (2%) |
| Licensed Late-Night | Leased | 523 | 465 | 448 | 449 | 435 | 431 | (18) | (4%) | (16) | (3%) | (92) | (18%) |
| Licensed Late-Night | Free | 10,232 | 9,746 | 9,552 | 9,407 | 8,999 | 8,976 | (431) | (5%) | (339) | (3%) | (1,256) | (12%) |
| Nightclub | Total | 1,283 | 1,065 | 938 | 907 | 869 | 875 | (32) | (3%) | (158) | (15%) | (408) | (32%) |
| Nightclub | Managed | 238 | 214 | 207 | 201 | 196 | 193 | (8) | (4%) | (13) | (6%) | (45) | (19%) |
| Nightclub | Leased | 40 | 36 | 32 | 32 | 29 | 29 | (3) | (9%) | (4) | (11%) | (11) | (28%) |
| Nightclub | Free | 969 | 785 | 699 | 649 | 644 | 629 | (20) | (3%) | (136) | (17%) | (340) | (35%) |
| Nightclub | Not characterised* | 36 | 30 | 26 | 25 | 25 | 24 | (1) | (3%) | (5) | (16%) | (12) | (32%) |
| By Nation | | | | | | | | | | | | | |
| Licensed Late-Night | Total | 14,106 | 13,473 | 13,304 | 13,145 | 12,717 | 12,664 | (481) | (4%) | (328) | (2%) | (1,442) | (10%) |
| Licensed Late-Night | England | 12,241 | 11,694 | 11,563 | 11,423 | 11,063 | 11,015 | (408) | (4%) | (271) | (2%) | (1,226) | (10%) |
| Licensed Late-Night | Scotland | 1,234 | 1,190 | 1,164 | 1,152 | 1,103 | 1,101 | (51) | (4%) | (38) | (3%) | (133) | (11%) |
| Licensed Late-Night | Wales | 630 | 588 | 569 | 562 | 551 | 548 | (14) | (2%) | (26) | (4%) | (82) | (13%) |
| Nightclub | Total | 1,282 | 1,065 | 938 | 907 | 869 | 875 | (32) | (3%) | (158) | (15%) | (407) | (32%) |
| Nightclub | England | 1,054 | 872 | 797 | 746 | 735 | 718 | (28) | (4%) | (126) | (14%) | (336) | (32%) |
| Nightclub | Scotland | 125 | 109 | 94 | 92 | 90 | 90 | (2) | (2%) | (17) | (16%) | (35) | (28%) |
| Nightclub | Wales | 67 | 54 | 47 | 44 | 44 | 43 | (1) | (2%) | (10) | (19%) | (24) | (36%) |
| Nightclub | Northern Ireland* | 36 | 30 | 26 | 25 | 25 | 24 | (1) | (3%) | (5) | (16%) | (12) | (32%) |
| By Area | | | | | | | | | | | | | |
| Late Night | City | 6,982 | 6,631 | 6,518 | 6,468 | 6,282 | 6,264 | (204) | (3%) | (163) | (2%) | (718) | (10%) |

³³ Audience Strategies analysis of data from CGA by NIQ Outlet Index (December 2023).

³⁴ This data shows the 'net decline' in sites in the sector, thus including both openings and closures. All data here is GB (so it does not include Northern Ireland) Source: CGA by NIQ & AlixPartners Hospitality Market Monitor (December 2023 data). Licensed market = Venues that sell alcohol on site, such as pubs, bars, restaurants and clubs. Late-Night = Aggregate of 'Nightclubs', 'Bars', 'Bar Restaurants' and 'Large Venues'. Nightclub = Late-night venue, closing after midnight. Music and entertainment are the primary focus for visit. Bars = Typical late-night bars such as Late Night Bars, Cocktail Bars, Wine Bars, Craft Bars etc. Bar Restaurants = Offers both food and high quality drinks. Often transitions from dining in the evening to a 'bar' feeling in the night. Large Venue = Arenas, Theatres, Bingo Halls, Licensed cinemas, Ballroom, Licensed sports arenas.

| | | | | | | | | | | | | | |
|------------------|--------------------|--------------|--------------|------------|------------|------------|------------|-------------|-------------|--------------|--------------|--------------|--------------|
| Late Night | Town | 4,424 | 4,216 | 4,153 | 4,078 | 3,959 | 3,947 | (131) | (3%) | (138) | (3%) | (477) | (11%) |
| Late Night | Small Town/Rural | 2,700 | 2,626 | 2,633 | 2,599 | 2,487 | 2,464 | (135) | (5%) | (27) | (1%) | (236) | (9%) |
| Nightclub | City | 617 | 531 | 486 | 459 | 457 | 446 | (13) | (3%) | (72) | (14%) | (171) | (28%) |
| Nightclub | Town | 445 | 360 | 323 | 301 | 293 | 290 | (11) | (4%) | (59) | (16%) | (155) | (35%) |
| Nightclub | Small Town/Rural | 185 | 144 | 129 | 122 | 119 | 115 | (7) | (6%) | (22) | (15%) | (70) | (38%) |
| Nightclub | Not characterised* | 36 | 30 | 26 | 25 | 25 | 24 | (1) | (3%) | (5) | (16%) | (12) | (32%) |
| Nightclub | Total | 1,283 | 1,065 | 964 | 907 | 894 | 875 | (32) | (3%) | (158) | (15%) | (408) | (32%) |

Raw data is GB (i.e. UK excl. Northern Ireland). Source: CGA by NIQ Outlet Index (December 2023).

Audience Strategies has estimated the Northern Ireland share (marked with *) and added it to create an overall picture of the UK.

Late-night drink stats

The recent data from the CGA by NIQ, focusing on drinks sales across the UK's night-time economy (excluding Northern Ireland) from 2019 to 2023, underscores a pivotal narrative about the state of nightclubs in relation to the broader industry. While the overall on-premise drinks market has shown resilience with a slight increase of 0.8% over four years, nightclubs have not fared as well, highlighting a sector-specific struggle within the night-time economy.

*"... Young people are being much, much more selective about how they go out...
picking one, two nights to go out within a week.*

And with the cost of living, people are coming out much later to gigs and buying fewer drinks when they do. The spend per head is very inconsistent..."

- James Slater, Venues & Operations Manager, Nottingham Trent Students' Union & The Level

Nightclubs have experienced a significant downturn, with an 18.9% decline in sales from £579M in 2019 to £470M in 2023. This stark contrast to the overall market stability is further accentuated by an 18.3% fall from 2022 to 2023 alone, underlining the acute challenges nightclubs face in recovering to pre-pandemic levels. This downturn is a clear indication of the sector being disproportionately affected by the pandemic's long-lasting impacts, changing consumer habits, and possibly more stringent operational challenges compared to other venue types.

In comparison, other segments of the night-time economy have shown varying degrees of resilience and growth. The late-night segment, despite a recent 5.0% drop from 2022 to 2023, has managed a 4.8% increase in sales when viewed over the four-year span. Bars and bar restaurants have seen mixed fortunes, with bars experiencing an overall increase of 11.5% since 2019 but a decline in the last year, and bar restaurants maintaining steady growth. Large venues have reported the most substantial growth at 18.8% over the four years, even though they too faced a slight reduction recently.

The data paints a concerning picture for nightclubs, which are lagging in the post-pandemic recovery phase compared to their counterparts. This divergence emphasises the need for a focused approach to support the nightclub sector, acknowledging its unique challenges and the crucial role it plays in the cultural and social fabric of the night-time economy. The stark decline in nightclub sales not only signals a sector under stress but also calls for targeted interventions to aid its recovery, ensuring nightclubs continue to thrive as pivotal spaces for music, culture, and community within the UK's night-time landscape.

*"... People are going out less. They make very last-minute decisions, impacting sales and stress levels.
The cost of living crisis has also really bitten hard.*

We're noticing that the market has compressed by 20 to 30%, both in people coming out and in bar sales ..."
- Pete Jordan, Director / Founder of Weird Science & MADE Festival

| Drinks sales (Value £M) | Full Year 2019 | Full Year 2022 | Full Year 2023 | % Sales vs 2019 | % Sales vs 2022 |
|-------------------------|----------------|----------------|----------------|-----------------|-----------------|
| Total On Premise | 31,129 | 31,383 | 31,386 | 0.8% | 0.0% |
| Late-Night | 4,033 | 4,445 | 4,225 | 4.8% | -5.0% |
| Nightclub | 579 | 575 | 470 | -18.9% | -18.3% |
| Bar | 1,381 | 1,643 | 1,539 | 11.5% | -6.3% |
| Bar Restaurant | 1,438 | 1,437 | 1,462 | 1.6% | 1.7% |
| Large Venue | 635 | 790 | 754 | 18.8% | -4.5% |

Data from GB (i.e. UK excl. Northern Ireland). Source: CGA by NIQ On Premise Measurement Service (December 2023)³⁵

³⁵ Source: CGA by NIQ On Premise Measurement Service (December 2023). Late-Night = Aggregate of 'Nightclubs', 'Bars', 'Bar Restaurants' and 'Large Venues'. GB, excluding NI. Total Drinks = Alcohol & Soft Drinks

Appendix 3: Questions for Large Clubs and Festivals

Here we transform the findings of this report into actionable questions for large clubs and festivals, who have been the beneficiaries of many of the trends shaping the industry. By contemplating these questions, large clubs and festivals can remain vital, inclusive, innovative and positive forces in the electronic music ecosystem.

Here's a list of questions inspired by the report's insights, designed to provoke thought and encourage strategic planning by these venues:

1. Diversity and Inclusion:

- How are you actively promoting diversity and inclusivity within your line-ups, ensuring representation from traditionally marginalised backgrounds, local talent, emerging artists, and gender diversity?
- What steps are being taken to create a safe and welcoming environment for all clubbers, including those from the LGBTQ+ community and people from other traditionally marginalised backgrounds?

2. Supporting Local and Emerging Talent:

- Are you providing appropriate slots and platforms for local, young, and emerging artists / professionals to showcase their talent and gain visibility?
- How are you collaborating with local music education institutions or initiatives to nurture the next generation of electronic music talent / professionals?

3. Expanding Beyond Traditional Clubbing:

- What innovative experiences are you offering that cater to clubbers without the necessity for late nights?
- How are you exploring flexible uses of your space to accommodate non-clubbing community activities, yoga, wellness sessions, workshops, or daytime events that still resonate with the clubbing culture?

4. Supporting The Grass Roots:

- What strategies are in place to help mitigate the economic challenges that critical smaller, local and underground clubs face because of the changing nightclub attendance and spending patterns?

5. Promoting Health and Well-being:

- How are you ensuring the health and safety of your attendees, particularly in regard to sound levels, crowd management, and substance abuse prevention?
- How are you ensuring that your venues are a welcoming and safe space for people from traditionally marginalised backgrounds, women in general and old women in particular.

6. Environmental and Social Responsibility:

- Are there initiatives in place to make your operations more sustainable and environmentally friendly, resonating with the growing concern for green practices among your audience?
- How are you leveraging your platform to address social issues or support charitable causes within the broader community?

Appendix 4: About Audience Strategies

This report was written by [David Boyle](#) of [Audience Strategies](#). Any questions: david@audiencestrategies.com

David has 20+ years of experience using technology to develop audience intelligence and strategy capabilities in the creative industries. His work has changed the culture and economics of the world's most prestigious entertainment and luxury brands, including EMI Music, HarperCollins Publishers, BBC, MasterClass and Harrods. David runs Audience Strategies, an agency that helps brands use a deep understanding of their audiences to drive growth. Audience Strategies has written / supported reports including the annual IMS Business Report, this annual NTIA UK Electronic Music Report and the annual Traptal Report. They also co-wrote the [PROMPT, practical guide to ChatGPT](#) series.



David Boyle

Brand and Corporate Strategy

David has 20+ years of experience developing audience intelligence and strategy capabilities that changed the culture and economics of the world's most prestigious luxury brands and some of the biggest entertainment brands in the world. David loves electronic music and writes the IMS Business Report.



Louisa Livingston

Segmentation

Louisa helps companies and brands grow and has worked across Consumer Insight, Innovation and CRM. She has built insights capabilities that help brands make better decisions. From EMI Music to Hachette and Harrods, she has built transformative teams.



Richard Bowman

Research

Richard has 15 years of experience covering FMCG, media and entertainment industries. He has designed and delivered consumer segmentation for some of the world's biggest entertainment brands. Richard works closely with us alongside leading This Is Insight.



Rufy Anam Ghazi

Research

Rufy is a Music Tech Specialist and Research Analyst with extensive experience in product strategy and music market research. Her background includes impactful roles at Keakie Music and ByteDance, where she excelled in product development and strategic partnerships.



Simon Jacobs

Analytics

Simon has over 15 years of experience delivering insight and analytics solutions to some of the biggest entertainment, technology and luxury goods brands. His expertise is delivering solutions that make insightful findings accessible.

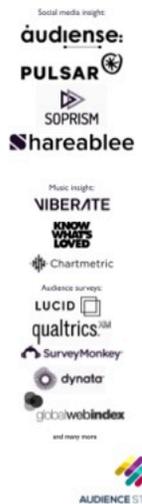


Eva Szokol-Humay

Research

Eva is highly skilled at setting up, project managing and building analysis processes for complex, multi-country and multi-wave consumer insight initiatives across different industries ranging from the public sector, to international media companies, publishing, technology, education and retail.

We partner with a number of data and analytics partners we love, including:



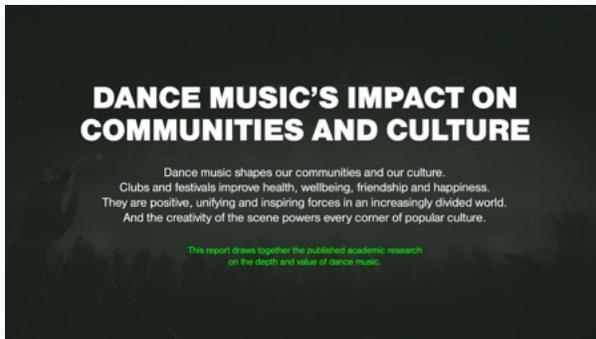
Five questions we love answering

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| <p>1. What should my DATA & CRM STRATEGY be?</p> <p>How can audience data be more impactful for me?</p> <p>What data / insight / research / analytics / data science capabilities do I need? How should I staff them?</p> <p>How can I optimize the customer journey and get more value out of my CRM data?</p> | <p>2. Who is my AUDIENCE and what should my STRATEGY be?</p> <p>Who is my audience(s) today? How engaged are they with my brand?</p> <p>Who could / should my audience be tomorrow?</p> <p>What types of products, prices, promotions, partnerships etc should I develop to meet their needs?</p> | <p>3. How should I develop my BRAND POSITIONING to engage my audience?</p> <p>How can I develop my brand ...</p> <p>... to better resonate with my current and target audience(s)?</p> <p>... to unify my staff and their decisions behind our strategy?</p> <p>... to engage partners in helping us grow?</p> | <p>4. Which PARTNERS should I pick to better engage my audience?</p> <p>Which talent, media channels and brand partners are hot amongst my audiences?</p> <p>Which are rising / falling?</p> <p>Which platforms are they hot on?</p> <p>In which countries?</p> | <p>5. How can I tell DATA-DRIVEN STORIES using audience data?</p> <p>What data is available to help tell the stories I want to tell?</p> <p>What are the trends in my industry?</p> <p>Which audiences are there?</p> <p>What stories are hidden in my data that I could share with stakeholders or the world?</p> |
| <p>How we answer them:</p> <p>We interview your leadership to understand the Jobs audience data can help you to do, interview teams in other industries and your existing data teams to understand understand what's possible and how to get there.</p> | <p>We segment audiences using surveys, transaction data and social audiences. Then, taking into account segment fit, existing reach and potential reach compared to competitors we'll pick target segments.</p> | <p>We start with your team's vision / values and your audience(s) needs. Our process brings these together to find a brand positioning, strategy and brand book that is authentic and that resonates with your audiences.</p> | <p>We use billions of signals from social and digital platforms. Sometimes enhanced with survey research. We produce monthly dashboards for clients that explore thousands of partners in dozens of countries.</p> | <p>We interview your team about the stories they want to tell. Then we gather data and industry perspectives to help tell those stories. Finally we produce and present beautiful reports that change hearts and minds.</p> |

Other reports we've worked on that you'll be interested in



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Dance Music's Impact on Communities and Culture [link](#)



Hip-Hop / Music / Culture:
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