

# Electronic Beats, Economic Treats

The Third UK Electronic Music Report

5th February 2025



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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 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 third 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 dancefloor 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

**Electronic music remains a dynamic economic and cultural cornerstone of the UK, contributing an estimated £2.4 billion in 2024 alone.** While overall spending has dipped in certain areas since 2022, the sector shows extraordinary **resilience** and **innovation**, balancing commercial opportunities with community-driven values.

Demand for electronic music at festivals continues to thrive. 310 UK festivals in 2024 featured electronic music (up from 294 in 2023), drawing **over 3 million attendees**. This surge has pushed festival revenues up to **£646.2 million**—a bright spot offset by the 16% drop in nightclub spending and the ongoing decline in club numbers. Many venues face rising property costs, regulatory hurdles, and shifting consumer behaviours, forcing creative adaptations like multi-use spaces, earlier closing times, and more inclusive programming.

The UK's role as a **global tastemaker** endures. Eight UK DJs feature in the 2024 DJ Mag Top 100, reflecting the sector's strong export influence. Recorded music and publishing together reached **£133.9 million** in domestic revenues, while electronic music exports climbed to **£81.3 million**, underscoring the genre's international pull. Yet a persistent **recognition gap** remains: the culture is more celebrated abroad than at home, and many operators feel the need for deeper public support.

Looking ahead, fostering the next generation of talent and protecting cultural spaces are critical. Education, policy reform, and targeted financial relief for grassroots venues could preserve the UK's unique sonic ecosystems. Emphasis on **inclusion, community, and mental wellbeing** is also growing, with collectives championing safer spaces and new approaches to audience engagement. Sustained effort from government, industry, and local communities can ensure that the UK's electronic music scene retains its cultural authenticity while driving meaningful economic growth.

## Key Facts<sup>1</sup>

### Electronic music's cultural impact

- **29%**: The share of artists performing at UK festivals in 2024 that are electronic—the highest of any genre (Rock 22%, Pop 20%).
- **310**: UK festivals in 2024 featured electronic music (up from 294 in 2023), drawing **3.0 million** attendees—a 14% increase.
- **165.7K**: Radio spins for Calvin Harris in the UK, making him the most-played domestic electronic artist; Joel Corry follows with **89.1K** spins.
- **80%**: The share of the top 30 global artists over the last year who have been significantly influenced by electronic music, up from 73% previously.

### Electronic music's impact around the world

- **8**: The number of UK DJs in the 2024 DJ Mag Top 100, placing the UK third after the Netherlands and Germany.
- **808K**: Combined monthly searches for those eight UK DJs across nine key global markets (Google/YouTube).
- **£81.3 million**: Estimated UK electronic music exports in 2024 (recorded music + publishing), up 3% from last year.

### Electronic music's economic impact – our valuation

- **£1,232 million**: Total economic contribution from nightclubs in 2024, down 16% from **£1,463 million** in 2023.
- **851**: The number of nightclubs in 2024 (down from 875 in 2023).
- **£646.2 million**: The economic contribution from electronic music festivals, up 14% from **£567.8 million** in 2023.
- **72**: Independent festivals cancelled, postponed, or closed in 2024, despite overall attendance growth for the sector.
- **£133.9 million**: Combined recorded music (£88.4m) and publishing (£45.5m) for electronic music in 2024—1% higher than 2023.
- **£215.2 million**: Overall total for recorded music, publishing, and exports—rising 1.7% from **£211.7 million** last year.
- **£163 million**: Record-breaking ticket sales for electronic music events reported by Skiddle in 2024.
- **85.5 million**: Estimated total nights out based on electronic music across clubs, festivals and concerts in 2024, down from 97.5 million in 2023.

<sup>1</sup> Source: Audience Strategies analysis. Based on the latest data available from each source. Usually, 2024, but occasionally 2023 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.

- **1 in 3:** Grassroots music venues in 2024 that have become Community Interest Companies (up from 1 in 34 in 2014).
- **£26,000:** Typical annual pay for grassroots venue operators, who often work 60-hour weeks on slim profit margins.
- **Double or triple:** The rise in production costs for festivals and large events since the pandemic, compounding financial pressures.
- **£2,394.1 million:** The total measurable economic impact of electronic music across recorded music, nightclubs, festivals, and concerts in 2024—a 5% drop from £2,528.2 million in 2023.

## Contributors

This report was written by David Boyle, Rufy Ghazi, Ethan Holben, Charlie Palmer 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 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 Michael Kill, CEO at NTIA for his leadership and guidance**

**Thanks for data and analysis from:**

- Reuben Pullan at CGA by NielsenIQ
- Vasja Veber at Viberate for data on festivals and music listening

**Thanks for interviews, insights, case studies and perspectives from:**

- Brandon Block, Motivational Thought Coach at Happy Days For Everyone and DJ
- Charlie Toller, Music Lead at VML
- James Slater, NTIA NTE Regional Ambassador; Venues & Operations Manager, The Level & Nottingham Trent Students' Union
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If you'd like to contribute to next year's report in any way, please get in touch with [david@audiencestrategies.com](mailto:david@audiencestrategies.com).

# Forewords

## Michael Kill, CEO, Night Time Industries Association

Electronic music is more than just a genre; it is a cultural movement, a driver of economic prosperity, and a fundamental pillar of the UK's global creative influence. From the underground clubs of Manchester to the iconic festivals of London and beyond, electronic music has shaped our cities, our communities, and our identity on the world stage. It is an industry that generates billions for the UK economy, fuels tourism, and provides a platform for cutting-edge artistry and innovation.

Despite its undeniable impact, electronic music has often been overlooked in discussions of cultural policy and industry representation. It is time for that to change. The release of this Electronic Music Report underscores not only the scale and significance of this sector but also the urgent need for it to have a dedicated seat at the table—one that reflects its contribution to the UK's economic, social, and cultural fabric.



The numbers speak for themselves. The electronic music ecosystem—spanning artists, venues, promoters, labels, and countless other stakeholders—drives employment, stimulates local economies, and enhances the UK's standing as a global music powerhouse. Yet, unlike other cultural industries, it has historically been underserved when it comes to support, regulation, and recognition. This report makes clear that electronic music is not an afterthought—it is a vital force in the UK's creative and night-time economy and must be treated as such.

As we navigate a rapidly evolving landscape, it is imperative that policymakers, industry leaders, and cultural institutions recognise electronic music's rightful place alongside other major cultural exports. This report is not just a reflection of where we are—it is a rallying call for where we need to be. Now is the time to elevate, empower, and protect electronic music as a cornerstone of Britain's creative and night-time economy.

## Wez Saunders, CEO, Defected Records

"In the kaleidoscopic world of electronic music, where the sounds of tomorrow are constantly being shaped today, we stand at an extraordinary intersection of culture, technology, and commerce. As we venture into 2025, it's essential to recognise the profound impact and transformative power of the electronic music industry – not just within the borders of the United Kingdom but as a pivotal force on the global stage.

The Night Time Industries Association's Electronic Music Report illuminates the expansive ecosystem of electronic music, revealing a sector that is not only a crucible of creativity but also a formidable pillar of the creative economy. This report deftly illustrates how electronic music is a vibrant, multifaceted genre that transcends geographical and cultural boundaries, fostering communities, driving innovation, and shaping cultural narratives across continents.



Electronic music, as detailed in this edition, thrives through the interplay of live performances, digital streams, and the unyielding spirit of its creators and fans. From the underground clubs to massive festival stages, from the private studios of bedroom producers to the public playlists of global streaming platforms, electronic music weaves a tapestry of cultural exchange and economic opportunity.

Reflecting on the themes of resilience and innovation highlighted in my recent writings (via my Substack Wessays), the electronic music industry exemplifies these qualities in abundance. This year, I am championing the community to "fail fast, fix faster" and foresee a commitment to "less is more" becoming more evident in its rapid adaptation to new technologies and its relentless pursuit of meaningful, impactful musical experiences.

As we share this report with stakeholders and policymakers, our goal is to advocate for sustained support and investment in a sector that not only entertains but educates, influences, and inspires. It is our collective responsibility to nurture and protect this cultural powerhouse, ensuring it continues to thrive and expand its reach.

In closing, I am honoured to contribute to this vital discourse, championing a genre that continues to innovate and unite people across the globe. For me, it's House Music All Life Long. Let us move forward with the courage to embrace the new, the wisdom to preserve the best of the past, and the vision to shape a future where electronic music remains at the forefront of cultural and economic excellence."

## Dame Caroline Dinenage, Chair of the DCMS Select Committee

Electronic music is a vital part of the UK's rich cultural tapestry, showcasing our nation's creativity and innovation on the global stage. It has grown from grassroots communities into a world-renowned industry, generating significant economic and cultural exports.

Protecting and nurturing grassroots electronic music is essential—not only for supporting emerging talent but also for safeguarding this vibrant and influential part of our cultural heritage. It is a cornerstone of our creative identity and must be valued as a key contributor to the UK's soft power and global reputation.



## Sacha Lord, Co-Creator, Parklife Festival and The Warehouse Project; Chair, Night Time Industries Association

As a long-time advocate for electronic music, I am proud to contribute to this year's Electronic Music Report. This genre, which has long been a pillar of our cultural landscape, continues to shape not only the UK's music scene but also its broader economic and social fabric. Electronic music is far more than just an art form; it is a cultural movement that transcends geographical and generational divides, creating communities and connections across the world.

The UK is a global leader in electronic music, with our festivals and clubs acting as beacons of creativity and inclusivity. Events like Parklife and The Warehouse Project are prime examples of how electronic music has evolved to become one of the UK's most vital cultural exports. These festivals are not just celebrations of music; they are the heartbeat of a vibrant, diverse, and thriving scene. They attract global talent and audiences, support economic growth, and shine a spotlight on the next generation of artists, both on stage and behind the scenes.



As we move into 2025, it is essential to recognise the critical role electronic music plays within the UK's creative and cultural economy. This report underscores its importance as one of the UK's largest domestic markets and highlights the need for continued investment and support. We must ensure that our venues, festivals, and artists continue to receive the recognition and resources they deserve to thrive and innovate.

From the pulse of the underground to the mainstream stages of global festivals, electronic music in the UK continues to inspire, unite, and drive progress. As this sector grows, it brings with it new opportunities for innovation, community engagement, and international collaboration. It is our responsibility to advocate for the policies and support systems that will enable this industry to continue to flourish.

I am excited to see how the insights in this report will inspire further action and recognition for electronic music, and I look forward to the continued growth of a sector that has proven itself to be a key pillar of the UK's cultural identity.

### **Freek Wallagh, Night Mayor of Amsterdam**

Nightlife is in a dire state. Club culture and the nocturnal experiment operate as the engine behind art, innovation and the emergence of new ideas. But the scene is struggling.

When we witness the diminishment of nightlife it often seems to happen one incident at a time. An artist unable to pay their bills, a promoter unable to offer a stage to new talent, a venue that once housed a local community now forced to close its doors. These venues and individuals are not solitary islands, but all interconnected parts of a cultural ecosystem constantly breathing new life into society. The freedom nightlife offers acts as an incubator for economic growth, entrepreneurship and community for society at large.

So even though our struggles may appear incidental, they demand structural, holistic support. Organised locally, in international solidarity.



### **Duncan King, Head of Festivals & Partnerships (B2B), Skiddle**

2024 was undeniably a challenging year for the sector, but one truth remains unwavering: culture always prevails. We've weathered storms before—like the rise and fall of the superclub era—and each time, the ashes have given rise to something extraordinary.

The electronic music ecosystem is truly unique. From bedroom producers and local club promoters to international superstar DJs and the world's most iconic festivals, every element of this intricate network plays a vital role. Despite the challenges, opportunities are abundant, and we are



currently witnessing some of the most exciting innovations the scene has seen in years.

In an increasingly online-driven world, the physical experience of electronic music—the energy, the shared moments, and the sense of community—has never felt more precious. It's in these moments that the true magic happens, reminding us why this culture will always thrive.

### **Steven Braines, Co-founder, HE.SHE.THEY.; Board Member, NTIA**

As an advocate for equality, diversity, inclusion, and innovation within electronic music, I am honoured to contribute to this year's Electronic Music Report. The genre has always been at the forefront of cultural change, breaking boundaries and bringing people together through the universal power of sound. From the underground rave culture to the global festival stages, electronic music has continuously evolved, pushing the limits of what's possible and inspiring countless communities across the world.

At HE.SHE.THEY., our mission has always been to create spaces where everyone, regardless of gender, race, sexuality or background, can come together and celebrate the music that unites us all. Through our events, record label, and collaborations, we've seen firsthand the extraordinary impact electronic music can have, not just in terms of entertainment and economy but in improving mental health and creating lasting socio-cultural change in cities across the UK and, indeed, now in six continents. The UK's influence in this space is undeniable, from iconic events to the innovative artists that push the boundaries of creativity. This report highlights the immense value that electronic music brings to the UK, both culturally and economically.



However, we cannot overlook the challenges that our industry continues to face. From preserving safer and inclusive spaces in venues to ensuring that the voices of marginalised communities are heard, there is still much work to be done. It is crucial that we continue to support the industry through thoughtful policies, investment, and a commitment to making electronic music a space for everyone.

As we look ahead, I am filled with hope for the future of our scene. The next generation of artists, producers, and fans are shaping a more inclusive, creative, and dynamic environment. Let us all work together to nurture this growth, ensuring that the future of electronic music is brighter, more inclusive, and more innovative than ever before.

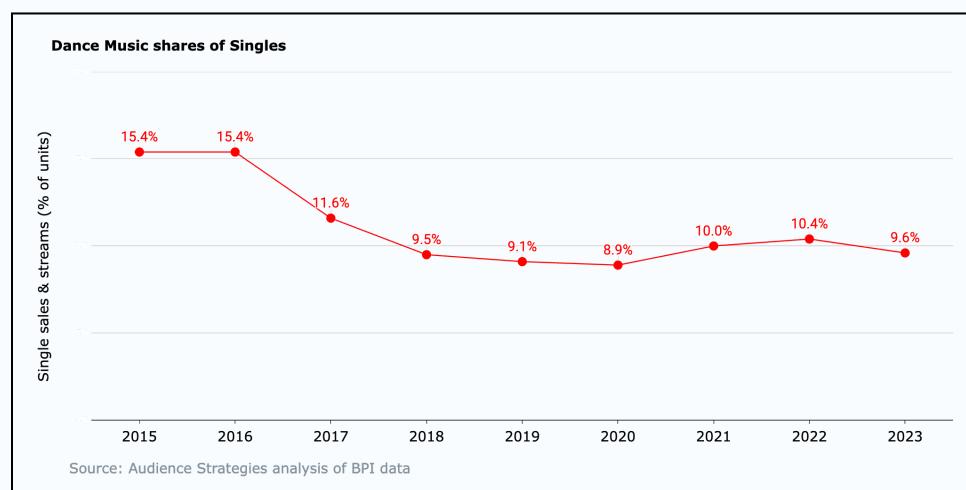
# 1. Economic Heart: The Full Ecosystem

The UK's electronic music ecosystem pulses with unprecedented vitality in 2025, demonstrating remarkable adaptability amid rapid change. From packed warehouses to intimate basement venues, from streaming innovations to vinyl resurgence, this industry continues to innovate and evolve. Our calculations estimate that the electronic music sector is valued at approximately £88.4 million in recorded music and £45.5 million in publishing in the UK, bringing the total to £133.9 million. This represents an increase of 1% from 2023, where the figures were £87.6 million in recorded music and £45.1 million in publishing, totalling £132.7 million.

The industry's contribution to the UK economy tells only part of the story – equally important is the sector's role in cultural exports. We estimate £53.7m worth of electronic music exports and £27.6m of electronic music publishing exports, totalling £81.3m. This is up 3% from 2023. Overall, we estimate that electronic music generated £215.2 million in 2024 across recorded music, publishing, and exports, which represents a 1.7% increase from the £211.7 million estimated for 2023.

The UK's electronic music scene is dominated by homegrown artists. When it comes to radio airplay, leading the charge is Calvin Harris, who sits at the pinnacle with an impressive 165.7K 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 89.1K spins. His presence reinforces the UK's strong inclination towards supporting its local artists.<sup>2</sup>

When it comes to streaming, dance music decreased its share of UK singles in the overall UK market in 2023 to 9.6%, down 0.8% from 10.4% in 2022.<sup>3</sup>



<sup>2</sup> Source: Audience Strategies analysis of data from Viberate on January 30th 2025

<sup>3</sup> Source: Audience Strategies analysis of data from BPI.

## 1.1 Value Creation in Motion

The ecosystem's economic rhythm flows through multiple channels, each playing a crucial role in the industry's vitality. 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 80% of the top 30 global artists have been heavily influenced by electronic music.

Viberate, a music analytics service, data shows that 80% of the top 30 global artists in the past year were significantly influenced by electronic music, compared to 73% in the previous year.

- Top 30 artists who we deemed to have been significantly influenced by electronic music include Lady Gaga, Dua Lipa, Linkin Park, Billie Eilish, The Weeknd, Rihanna, Justin Bieber, Travis Scott, BTS, Katy Perry, Jason Derulo, Rauw Alejandro, Ariana Grande, Selena Gomez, ROSÉ (로제), Imagine Dragons, Coldplay, Shakira, Beyoncé, Bad Bunny, Chris Brown, Sabrina Carpenter, Drake, Karol G.
- Top 30 artists who we deemed to have not been significantly influenced by electronic music: Taylor Swift, Bruno Mars, Ed Sheeran, Kendrick Lamar, Eminem, Adele.

The UK's leading promoters and venues form a cornerstone of this ecosystem. Iconic institutions like the Ministry of Sound, The Warehouse Project, Creamfields, Fabric, and Parklife Festival have built a combined Instagram following of 1.2 million in the UK, demonstrating the robust foundation of engaged audiences that underpins the sector's vitality. Large-scale events showcase the sector's commercial strength - Duncan King, Head of Festivals & Partnerships at Skiddle, reports record-breaking ticket sales of £163 million, with electronic music driving the majority. This success extends beyond traditional nightlife as innovative operators expand into daytime events, hybrid venues, and creative workspaces.

At the grassroots level, venues like Cosmic Slop in Leeds demonstrate how community-focused spaces can combine cultural mission with commercial sustainability, directing profits to local charitable work while maintaining artistic credibility. "It's like the antithesis of everything commercial in club culture," says Gilles Peterson, who first played at Cosmic Slop in 2017. "You walk into certain places, and you can just see the love, care and attention that the promoters and organisers put into it. It rubs off on to the people." This model represents a growing trend toward more socially conscious business approaches in the sector.

## 1.2 Economic Struggles of Nightclubs

This section examines the ongoing economic challenges within the UK's night-time economy, focusing on the continued decline in nightclub numbers, attendance, and spending. The economic landscape for electronic music nightclubs continues to face significant challenges, with the latest

data revealing further contraction across key metrics. The total economic contribution of nightclubs has decreased to £1,232.4m in 2024, marking a substantial 16% decline from £1,463.2m in 2023, following the previous year's 14% decrease.

Great Britain's nightclub numbers dropped from 1,283 in March 2020 to 875 by December 2023, amounting to nearly a third of all venues lost since the onset of the pandemic. The sector's struggles continue, though. The number of GB nightclubs has fallen by another 3% from 875 in 2023 to 851 in 2024, continuing the trend from previous years. This sustained decline in venues represents a structural challenge for the industry.

The analysis also reveals a 16% decrease in total spending in 2024 compared to the previous year. The economic impact is evident across both spending categories. Indirect spending, encompassing preparation costs, transportation, food, and pre-venue drinks, has decreased to £726.2m from £836.4m in 2023. Meanwhile, direct spending within venues has contracted to £506.2m from £626.8m, highlighting the significant reduction in consumer expenditure within nightclub establishments.

This outlines the diminishing economic contributions of nightclubs to the UK economy, marked by significant reductions in both direct and indirect spending, alongside a continued decline in operational venues. It paints a picture of a sector facing continued pressures, with the rate of decline accelerating slightly from the previous year highlighting the urgent need for strategic intervention to stabilise and revitalise this important component of the UK's cultural and economic landscape.

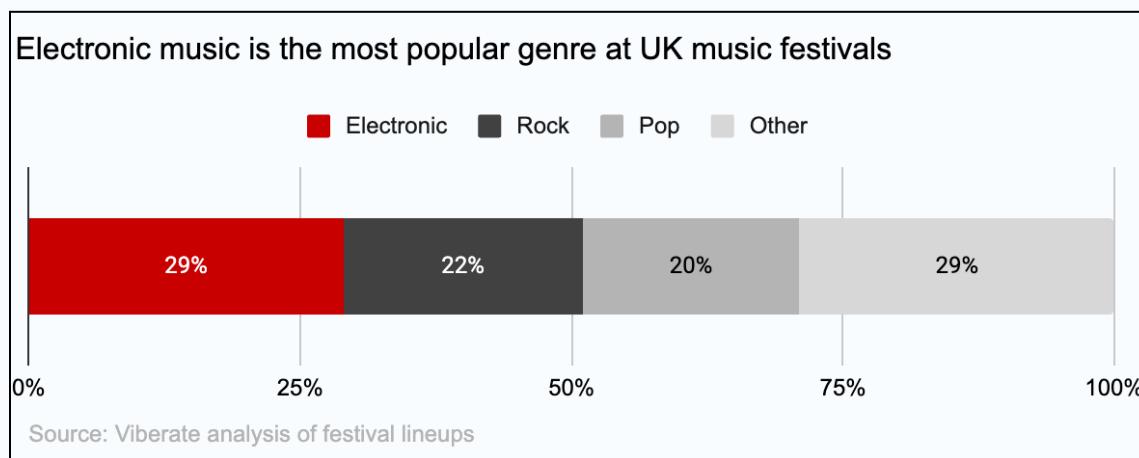
	2022	2023	2024	22-23 % change	23-24 % change
Number of nightclubs <sup>4</sup>	907	875	851	-3%	-3%
Nightclubs indirect	£955.3m	£836.4m	£726.2m		
Nightclubs direct	£743.6m	£626.8m	£506.2m		
Nightclubs total	£1,699.0m	£1,463.2m	£1,232.4m	-14%	-16%

<sup>4</sup> Source: Audience Strategies analysis of CGA by NIQ Outlet Index.  
Combined with updated estimates from leaders in the industry and leading industry economists.

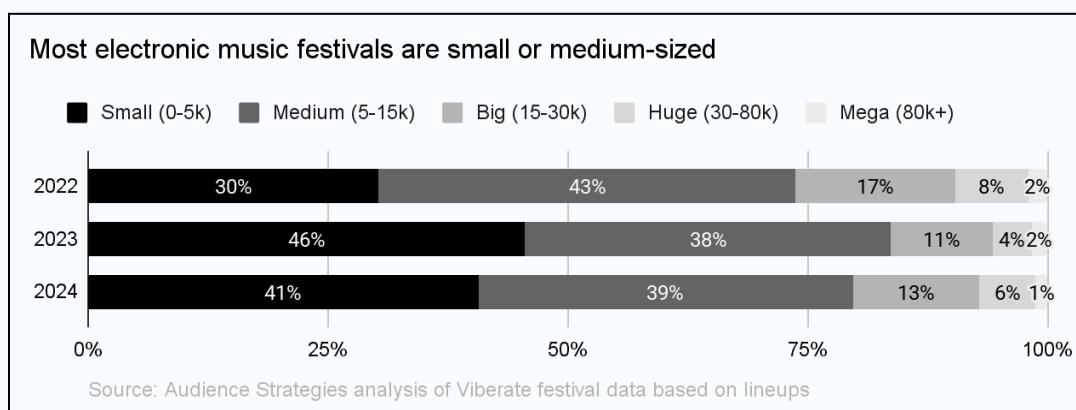
### 1.3 The Festival Effect

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 festivals and concerts 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 calculates that electronic music is the most common genre in UK festivals, making up 29% of artists performing. Rock (22%) and Pop (20%) are second and third, respectively. The number of UK festivals featuring electronic music also rose from 294 in 2023 to 310 in 2024.



Most electronic music festivals are small (0-5k attendees) or medium-sized (5-15k). 93% of all 2024 festivals with electronic music are under 30k attendees.



The economic impact of UK electronic music festivals continues to show remarkable growth in 2024, with the sector generating £646.2 million in total economic contribution. This represents a significant 14% increase from 2023's figure of £567.8 million, building on the previous year's growth trajectory. The surge is largely driven by a substantial rise in festival attendance, with 3,019,991 people attending these events in 2024 – a 14% increase from the previous year's 2,653,600 attendees.

This consistent year-on-year growth in both attendance and economic impact demonstrates the robust health of the UK's electronic music festival sector. The parallel 14% increase in both metrics suggests that the sector has maintained its revenue per attendee while successfully expanding its reach. This expansion indicates not only the growing popularity of electronic music festivals but also their increasing significance within the UK's cultural and economic landscape.

The sustained growth pattern, accelerating from 7% attendance growth in 2022-23 to 14% in 2023-24, points to a strengthening market with expanding appeal. These figures suggest that electronic music festivals are becoming an increasingly important component of the UK's entertainment and cultural offering, attracting larger audiences and generating substantial economic activity.

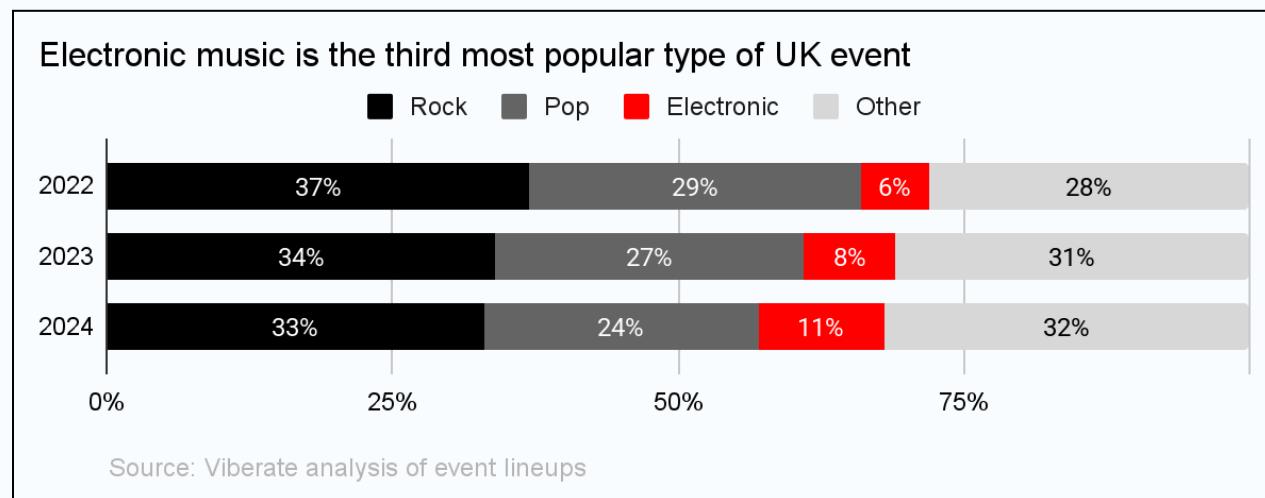
	2022	2023	2024	22-23 % change	23-24 % change
Festival attendees	2,480,000	2,653,600	3,019,991	7%	14%
Festivals total	£519.3m	£567.8m	£646.2m	9%	14%

However, this growth masks significant operational challenges. The Association of Independent Festivals (AIF) reports that 72<sup>5</sup> independent events were cancelled, postponed, or closed in 2024. Rising costs, post-pandemic credit challenges, and Brexit-related complications have created what industry leaders describe as a "perfect storm" for independent festivals. While larger corporate-owned festivals can absorb these pressures, smaller, family-run events face particular strain, threatening the "delicate ecosystem" on which the broader festival landscape depends. This tension between growth and sustainability reflects broader patterns across the electronic music economy. While overall attendance and revenues show healthy expansion, the underlying economics of festival operation remain challenging, particularly for independent promoters maintaining the scene's diversity and grassroots connection.

<sup>5</sup> <https://www.aiforg.com/blog-database/72-uk-festivals-cancelled-in-2024>

## Concerts and Other Live Electronic Music Events

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 and 11% in 2024.



## 1.4 The Impact of Mega Venues

The relationship between large-capacity clubs and traditional grassroots venues represents a complex dynamic within the ecosystem. Event capacities that were once unimaginable have become the norm, with large-scale venues now hosting tens of thousands of attendees. According to Sacha Lord, Co-Creator, Parklife Festival and The Warehouse Project and Chair, Night Time Industries Association, venues like The Warehouse Project now accommodate 10,000 people in a disused railway station, while Drumsheds reaches 15,000 - "capacities like that were never even heard of back in the carpeted club days."

This scale brings both opportunities and challenges for the broader ecosystem. These massive events have significantly reshaped market dynamics - as major venues increasingly dominate bookings and talent and create opportunities for innovation, they also often restrict access for smaller clubs and venues. Biff Mitchell, Executive Board, NTIA; Promoter/Festival Organiser: Electric Bay Mucky Weekender Festivals, Production: Glade Stage, Glastonbury, Beautiful Days, notes how "these mega venues that do 10,000 people, or in the case of Drumsheds, 15,000 people, that's going to affect [smaller venues]." This consolidation has created widespread ripple effects across the electronic music ecosystem, impacting the diversity and accessibility of events.

*We're in a super club cycle where bigger events have got bigger. And that has resulted in quite a dramatic falling away of turnouts in smaller nightclubs..."*

*- Pete Jordan, Promoter, A Man About A Dog Ltd. Founder & Director of MADE Festival*

## 1.5 Digital Transformation

The electronic music market has undergone a fundamental transformation over the years. Traditional revenue models centred on club nights and vinyl sales have given way to a more complex ecosystem. As Carl Loben, Editor-in-chief at DJ Mag, notes, where once "a producer could make a single, and it could sell 10,000 copies, and they'd make a decent wage," streaming has radically altered these economics. Yet this shift has also opened new opportunities, with electronic music fans demonstrating uniquely active engagement across multiple platforms.

*"... The UK's Dance & Electronic Music sector continues its robust growth trajectory, with streaming revenues showing sustained expansion. Artists are diversifying revenue streams beyond live performances, reflecting a mature digital-first business model that contributes significantly to the UK's creative economy. ..."*

*- Leigh Morgan, Global Director b:electronic, Believe,*

The streaming economy presents both opportunities and challenges. While providing unprecedented global reach, it has fundamentally altered revenue flows. Yet electronic music fans show distinctive engagement patterns, often actively seeking music across multiple platforms rather than passively consuming content.

Technology's impact extends beyond just streaming platforms. Social media has remodelled how events are promoted and experienced, though this brings its own challenges. Some venues, like newly-opened Amber's in Manchester, employ phone-free policies to preserve authentic crowd energy. Meanwhile, digital platforms enable new forms of community building and artist development.

## 1.6 Adaptation and Innovation

Despite the challenges, including the loss of several UK nightclubs, the sector shows remarkable resilience. Multi-use venues, innovative programming, and stronger community ties point toward sustainable future models. As Michael Grieve, owner of Sub Club Glasgow, notes: "You can be as creative and artistic as you want to be, but unless you've got an economic base to work from, it's a waste of time...you have to straddle that line between commercial viability and creative output."

The electronic music sector's adaptability manifests in diverse ways across the ecosystem. While headlines often focus on venue closures, equally significant is the emergence of new spaces and operational models. In Bristol, Motion exemplifies how venues can evolve, operating as a multi-room Victorian warehouse complex that transforms between daytime outdoor events in summer months and indoor nightclub programming during winter, maximising both cultural impact and commercial sustainability through its adaptive use of industrial heritage spaces.

Some venues are exploring unconventional spaces – as seen in Nottingham, where promoters organise pop-up parties in locations like local kebab shops, creating viral moments despite minimal resources. Others embrace technological innovation, with platforms like Beatport reporting significant growth in both streaming and traditional download sales. The festival landscape continues to evolve, with events adapting to changing consumer preferences. While some warn of market saturation, successful operators find ways to differentiate their offerings. As Duncan King observes, promoters increasingly focus on experience quality over quantity, responding to audiences who "may go out once a month, but they're still going out."

*"... We are seeing growth on our store. It grew something like more than 30% last year on the streaming side... Downloads were up 10% as well. That really tells us the DJ market segment is continuing to grow ..."*

*– Alex Branson, SVP, Industry Partnerships, Beatport*

Innovation continues in unexpected ways. Some venues explore phone-free policies to enhance authentic experiences, while others reimagine the VIP concept for the modern raver. Toller points to programs like "Drumsheds Plus", which gives people priority access, VIP lounge and other added benefits for someone going raving two or three times a year.

This adaptability extends to business structures. An increasing number of venues are transitioning to Community Interest Company (CIC) status. As Beverley Whitrick, COO, Music Venue Trust, mentions, "A big part of our work is trying to get recognition for venues as cultural places... In 2014, one in 34 grassroots music venues was a CIC; it's now one in three." This shift enables different conversations with local authorities and opens new funding avenues, demonstrating how structural innovation can support both cultural mission and financial sustainability.

Looking ahead, the ecosystem's health depends on maintaining diversity across all levels. As Charlie Toller, Music Lead at VML, emphasises, success requires spending money "in areas of the music industry that are adding value to the fan and the ecosystem." This means supporting both major events and grassroots venues, ensuring value flows sustainably through all parts of the system.

## 1.7 Broader Economic Impact

The influence of the electronic music ecosystem extends well beyond direct revenue generation, playing a vital role in supporting urban economies through its multiplier effect. Venues and events not only drive significant ancillary spending on hotels, restaurants, and local businesses but also bolster creative industries and technology providers. The growth of any city relies on a vibrant night-time economy, and the economic influence of this sector is significant. It is a necessity for policymakers to recognise and promote night-time commerce.

This economic ripple effect is being actively amplified by venues adopting more diverse business models. Many are extending their economic footprint by incorporating daytime operations like creative workspaces, recording studios, and community projects alongside their traditional nightlife offering. For instance, FOLD in London has expanded to include music studios, a restaurant, tattoo parlour and a record store, creating a self-sustaining creative ecosystem that generates revenue and supports local artists throughout the day. This approach not only strengthens venues' commercial resilience but also maximises their contribution to local economies by creating additional employment, supporting creative industries, and fostering cultural tourism beyond peak nightlife hours.

*“... One-off culture has hurt the regular week in, week out clubs... for that reason, if I was investing in a venue right now, I'd be looking at an event space rather than a week in, week out night club ...”*  
*- Jules O'Riordan (AKA Judge Jules), Sound Advice*

## 1.8 The Total Economic Impact of Electronic Music

In total, across nightclubs, festivals and concerts, we estimate that there were 85.5 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).<sup>6</sup>

Number of nights out	2022	2023	2024	22-23 % change	23-24 % change
Festivals	2.5m	2.7m	3.0m	7%	14%
Nightclubs	98.6m	90.4m	77.9m	-8%	-14%
Other live	4.4m	4.5m	4.6m	3%	3%
<b>Total</b>	<b>105.4m</b>	<b>97.5m</b>	<b>85.5m</b>	<b>-7%</b>	<b>-12%</b>

<sup>6</sup> Source: Audience Strategies analysis of data from various sources including CGA by NIQ, ONS and others.

Adding it all up, the measurable impact of electronic music on the UK across recorded music, nightclubs, festivals and concerts is £2.4b.<sup>7</sup>

	2022	2023	2024	22-23 % change	23-24 % change
Recorded music total	£180.9m	£211.7m	£215.2m	17%	2%
Nightclubs total	£1,699.0m	£1,463.2m	£1,232.4m	-14%	-16%
Festivals total	£519.3m	£567.8m	£646.2m	9%	14%
Other live total	£272.3m	£285.5m	£300.2m	5%	5%
<b>Total economic impact</b>	<b>£2,671.5m</b>	<b>£2,528.2m</b>	<b>£2,394.1m</b>	<b>-5%</b>	<b>-5%</b>

## 1.9 Looking Forward

The electronic music ecosystem in 2025 demonstrates both notable strengths and concerning vulnerabilities. While facing challenges – from market consolidation to changing consumer behaviours – the sector continues to innovate and adapt. Success stories like Manchester's Amber's show how new concepts can thrive while established operators find fresh ways to remain relevant.

The future requires balancing multiple priorities: supporting grassroots venues while embracing the opportunities of scale, maintaining cultural authenticity while pursuing commercial sustainability, and preserving local scenes while competing globally. As Michael Kill of the Night Time Industries Association emphasises, "Starting to influence policy and central government decision-making as a collective is vitally important."

Understanding these dynamics is crucial for ensuring the sector's continued growth and cultural impact. While facing significant headwinds, the industry's demonstrated ability to adapt and innovate suggests continued resilience – provided appropriate support and investment can be secured across all levels. The electronic music ecosystem's future health depends on maintaining this delicate balance, ensuring that both commercial success and cultural innovation can continue to thrive together.

*"... Politicians love to reference and speak about [the night time economy] but when it actually comes down to the really hard fiscal decisions...there's always priorities that are way, way higher than supporting nightlife ..."*

*- Michael Grieve, Owner of Sub Club Glasgow*

<sup>7</sup> Source: Audience Strategies analysis of data from various sources including CGA by NIQ, ONS, IFPI, BPI, Viberate, Chartmetric and more. See individual chapters of this report for a more detailed explanation of each data point.

## Case Study: Defected Records – Building Sustainable Success in Electronic Music

Defected Records provides a compelling example of how electronic music businesses can balance commercial success with cultural authenticity. Now in its 26th year, the label has grown from a UK house music imprint into a global brand, running over 300 events annually while maintaining credibility within the underground scene.

### Community Over Commerce

Defected's approach challenges traditional marketing strategies in electronic music. Rather than focusing purely on sales, the label prioritises education and celebration of music culture—including tracks from other labels. CEO Wez Saunders explains this stems from understanding what house music enthusiasts actually want: authentic engagement over hard selling.

This community-first strategy extends across all platforms. While many labels use social channels primarily for promotion, Defected focuses on sharing insights and information. This builds long-term trust and sustainable growth, even if it means sometimes promoting competitors' releases.

### Artist Development Focus

The label maintains a dual focus on both retaining established artists and developing new talent. Recent success stories include emerging artists like the Dunmore Brothers, Rio Tashan, and Olive F, demonstrating Defected's commitment to nurturing the next generation alongside working with established names.

This approach requires significant investment but helps ensure the label's continued relevance. By focusing on long-term artist development over quick commercial gains, Defected maintains its position as a trusted curator while building sustainable careers.

### Response to Market Saturation

Recognising current market saturation in electronic music, Defected has adopted a "less is more" strategy. This involves creating fewer but more meaningful moments that forge deeper connections with audiences. The approach aims to combat the constant churn of content and releases that characterise much of today's industry.

The label has also adapted to changing economic conditions. Rising costs and shifting consumer habits have led to increased artist fees and ticket prices. Defected's response focuses on quality over quantity, ensuring each release and event delivers genuine value.

## Blueprint for Sustainability

Several key principles emerge from Defected's success:

1. Balance: Maintaining equilibrium between commercial viability and cultural authenticity
2. Community: Building genuine connections beyond pure commerce
3. Development: Long-term investment in artist careers
4. Quality Control: Fewer, better releases and events
5. Education: Sharing knowledge and celebrating the culture broadly

## Future Outlook

While cautiously optimistic about electronic music's future, Defected recognises significant challenges ahead. These include economic pressures affecting consumer spending and continued market saturation. However, the label's history suggests that electronic music often flourishes during challenging times, particularly when businesses maintain focus on cultural value alongside commercial success.

## Case Study: Hospital Records – Independent Label Evolution in the Streaming Era

Founded in 1996, Hospital Records stands as one of the UK's most influential independent electronic music labels, particularly in drum and bass. Under co-founder Chris Goss's leadership, the label has successfully navigated seismic shifts in music consumption while maintaining its cultural integrity and fostering a dedicated global community.

### Adapting to the Streaming Revolution

Hospital's journey reflects the broader transformation of electronic music's economic model. "The major shift really is from physical sales and download and a la carte download sales to streams," Goss explains. While the label maintains an investment in physical products and download platforms like Beatport and Bandcamp, streaming now dominates its focus, with the challenge being visibility in an increasingly crowded landscape.

The label faces challenges on major platforms where the "sheer volume of music being released... is frankly insane." Access to influential playlists depends on multiple factors, including marketing scale, label reputation, and stylistic considerations. Goss notes a concerning trend toward

homogenisation in platform curation: "The joy of drum and bass music is its diversity... I would wish for more diversity of sound within those playlists."

### Community Building Across Generations

Hospital has cultivated a remarkably broad audience, spanning from 18-25 year-olds to dedicated followers in their 40s and 50s. This multigenerational appeal stems from the consistent nurturing of both emerging and established fans. "It's essential we look after our older fans," Goss emphasises, noting that long-term supporters "have really kept us going" through continued engagement with records, merchandise, and events.

### Live Events in a Changing Landscape

The label's live business faces significant post-pandemic challenges. Rising operational costs—from staging to security—have often doubled or tripled, while changing cultural habits mean "we almost have a generation of young people for whom clubbing is the exception, not the norm." Hospital responds by making careful strategic decisions while exploring initiatives like smaller-scale events to encourage new audiences.

### Future Vision

Hospital's approach to current industry challenges emphasises collaboration and responsibility. Goss advocates for established brands to help "positively evolve this sector," warning of a potential "chasm between the established clubs and venues and artists... and the underground." The label's success suggests independent electronic music companies can maintain cultural authenticity while adapting to market changes through strategic innovation and community focus. The label's evolution demonstrates how independent electronic music businesses can thrive by:

- Adapting to digital transformation while maintaining multiple revenue streams
- Building cross-generational fan communities
- Balancing commercial sustainability with cultural authenticity
- Taking active responsibility for sector development

As the UK electronic music industry seeks sustainable models for growth, Hospital Records offers valuable lessons in how labels can evolve while preserving their essential character and contribution to the scene.



## Case Study: Rubadub – At the Heart of Britain's Vinyl Capital

### Overview

Rubadub stands as one of the UK's most vital record distributors and shops, serving Glasgow's electronic music scene for over 30 years. What began as a small record shop in Paisley has grown into a cornerstone of British dance music culture, helping shape the sound of underground electronic music across Europe.

### Glasgow's Vinyl Culture

Glasgow stands as the UK's vinyl-collecting capital, with 32% of the nation's record collectors calling the city home. This concentration of vinyl enthusiasts has created a unique ecosystem where record shops like Rubadub don't just survive – they thrive. The city's reputation for vinyl culture hasn't happened by accident; it's been built through decades of work by independent shops, distributors, and passionate music fans.

### Origins and Evolution

Founded in 1992 by Martin McKay and Alan Gray with "a set of decks and a thousand pounds," Rubadub started in a former massage parlour in Paisley. The shop quickly became known for stocking house and techno records that were hard to find elsewhere in the UK. Their approach was direct – rather than relying on London distributors who often left Scottish shops at the bottom of allocation lists, they began contacting artists and labels directly.

### The Distribution Network

Today, Rubadub operates as both a shop and a significant distribution hub. From their warehouse in Hillington, they distribute for hundreds of labels, including Mood Hut, Novel Sound, Rhythm Section, and Echospace. Their approach to distribution mirrors their shop ethos – treating each release as "its own little island," providing bespoke support ranging from basic logistics to promotion and mastering assistance.

### Brexit and Current Challenges

Brexit has added new layers of complexity to their operation. As Richard Chater, a senior staff member, explains: "Brexit means loads of admin, with new obstacles appearing every two years." However, the challenge has led to increased cooperation between European distributors. Rubadub now works more closely with continental partners like Word and Sound, sharing distribution duties for various releases.

### The Vinyl Challenge

The rising cost of vinyl presents perhaps the biggest current challenge. Records have become "luxury items rather than casual purchases," particularly affecting club music sales. This shift is compounded by changing DJ habits, with many performers now preferring digital formats. Despite these challenges, certain releases still move significant numbers - Chater notes that international artists like Chaos in the CBD consistently sell over 1000 units of their 12-inch releases.

### Community Hub

Beyond sales and distribution, Rubadub serves as a cultural hub. Their staff includes DJs, producers, and promoters, making the shop a natural meeting point for Glasgow's electronic music community. This has helped foster new talent, with notable alumni including Jackmaster and Denis Sulta, who both worked at the shop before launching successful careers.

### Conclusion

While vinyl faces challenges from rising costs and digital alternatives, Rubadub continues to adapt. They've expanded into equipment sales, particularly modular synthesisers, and maintain a strong online presence. Their success appears to lie in understanding their role not just as a business, but as a community resource. The case of Rubadub demonstrates how record shops and distributors remain vital to electronic music culture, even as the industry evolves. In a city that leads the UK in vinyl collecting, their longevity suggests that while formats and business models may change, the need for knowledgeable, community-focused music businesses persists.

## 2. Physical Heart: The Club Experience

The physical spaces where electronic music thrives in 2025 reflect both unprecedented challenges and remarkable innovation. While over a third of UK nightclubs have closed since the pandemic, new formats and operational models demonstrate the sector's adaptability. From warehouse-scale venues to intimate pop-ups, these spaces serve as vital cultural laboratories where communities form and artistic expression flourishes.

### 2.1 The New Economics of Space

The scale and economics of electronic music venues have transformed dramatically, creating complex dynamics within local scenes. The rise of large-scale venues represents an evolution in the clubbing landscape, bringing unparalleled production values and attracting top-tier talent. However, their business models often necessitate exclusive booking arrangements that impact the wider ecosystem of clubs and promoters. This reshaping of booking practices reflects the delicate balance between delivering premium experiences and maintaining sustainable operations in today's electronic music industry.

For smaller operators, economic viability increasingly requires creative approaches. Lawrence Barton, Chair of Southside District in Birmingham, notes how "footfall is down a lot and with the cost of living...venues that are struggling already...you can't increase your cost to pass on to the end user." These pressures particularly affect independent operators, with rising costs threatening their survival. Yet amid these challenges, some venues find success through specialisation and community focus - Richard Chater, Co-Founder of Numbers Record Label & Senior Staff at Rubadub Distribution, remarks on Glasgow's DIY club Exit, "two young guys [who] took a chance on the space... they've been programming from experimental performance to techno... not trying to make a ton of money."

The impact of cost pressures varies by venue size. Beverley Whitrick, COO, Music Venue Trust, reports that "Most grassroots venues are operating on a 0.5% profit margin... the average operator pays themselves £26,000 a year and works 60-hour weeks." These tight margins leave little room for investment in infrastructure or programming innovation.

The pressure extends beyond individual venues to broader industry dynamics. Many operators now focus on fewer, higher-quality events rather than regular programming. As Wez Saunders, CEO, Defected Records, emphasises, "The market's saturated at the moment, actually, and I've noticed it getting worse and worse over the past couple of years... the demand has been in a slow decline since COVID for various reasons." This reality pushes venues to rethink traditional operational models.

## 2.2 Reimagining the Dancefloor

The traditional clubbing experience faces fresh scrutiny in 2025. Some venues implement phone-free policies to enhance authentic connection and preserve the original spirit of club culture. Sacha Lord highlights the success of this approach at venues like Amber's in Manchester, where concerns about enforcing a no-phones policy proved unfounded: "People said, 'How can you police no phones?'... They're self-policing. And it's doing really well." This return to present-moment engagement reflects a broader desire to recapture the communal energy that historically defined dancefloors.

Brandon Block, DJ and Motivational Thought Coach, observes a fundamental shift in attendance patterns: "COVID shut down a lot of channels... that year and a half break from clubbing changed that behaviour. People choose when they go out now. They may go out once a month, or once every six months." This changing pattern forces venues to create more compelling, unique experiences to attract patrons.

The trend toward earlier events gains momentum. Amy Van-Baaren, Chief Impact & Culture Officer at Resident Advisor notes changing demographics: "This young girl... was like 'oh my mother's your age, and she'd never go out'... suddenly you're walking off thinking about your age in spaces." This generational shift drives innovation in event timing and format.

*... Annie [Mac] has pushed the earlier night shows... We opened at 7:30 and closed at 11.*

*You've got to get that right now for the artist and the audience ...*

*- Biff Mitchell, Executive Board, NTIA; Promoter/Festival Organiser: Electric Bay Mucky Weekender Festivals, Production: Glade Stage, Glastonbury, Beautiful Days*

Meanwhile, innovative formats emerge in unexpected places. Silvia Montello, CEO, Voicebox & Board Member, AFEM, highlights how "you see the influence of electronic music and dance music growing more and more into every part of mainstream life." This mainstreaming creates opportunities for new venue concepts and operational models while raising questions about preserving authentic club culture.

## 2.3 Infrastructure and Access

Transport infrastructure significantly shapes venue operations in 2025. Biff Mitchell articulates a common challenge: "The biggest problem I see for clubbers is getting home... so they do earlier night shows." James Slater, NTIA NTE Regional Ambassador; Venues & Operations Manager, The Level & Nottingham Trent Students' Union, reinforces this point, explaining that "we've great transport, but not past midnight. It becomes expensive or difficult to get home after two or three in the morning." These infrastructure limitations increasingly shape programming decisions and operating hours.

Some venues respond by shifting their hours – Motion in Bristol, for example, operates different schedules seasonally. Dawid Chocholski, General Manager of Motion Bristol shares: "In summer, we're not really a nightclub. We do outdoor, daytime events... then from September, we move back indoors." This seasonal flexibility helps venues maximise their spaces and adapt to changing audience preferences.

The pressure extends beyond transport to fundamental infrastructure challenges. Many venues seek to evolve beyond traditional clubbing models into broader cultural hubs—incorporating studios, workspaces, and community facilities—but rising costs and property market pressures often thwart these ambitious plans for expansion and diversification.



### Adapting to Economic Pressure: Creative Solutions in Club Culture

Economic pressures have sparked remarkable innovation in how people engage with electronic music culture. Rather than diminishing participation, financial constraints have led to more strategic and community-minded approaches to scene engagement.

New attendance patterns show a shift from frequent, spontaneous nights out to carefully planned, higher-value experiences. Friend groups increasingly pool resources for ticket purchases, coordinate travel arrangements and develop sophisticated systems for sharing costs. Some communities have established informal ticket exchange networks, ensuring sold-out events remain accessible to regular attendees.

Venues and promoters have responded with creative solutions: membership schemes offering priority access and discounts, early-bird ticket tiers rewarding advance planning, and payment plans for festival tickets. Some venues now operate hybrid models, combining traditional club nights with community workspace or cafe facilities to generate additional revenue streams while fostering scene engagement.

These adaptations demonstrate the scene's resilience and capacity for innovation. Rather than compromising the culture, economic pressures have, in many cases, strengthened community bonds and inspired creative solutions that enhance accessibility and sustainability.

## 2.4 Higher Production and Costs

A stark divide has emerged between high-production, larger-scale events and traditional club experiences. Programming has become increasingly polarised – events either command premium fees and guaranteed audiences or struggle to draw crowds with smaller bookings. The disappearance of this middle ground threatens the ecosystem that historically nurtured emerging talent and sustained local scenes.

The trend toward "stadiumification", as Carly Heath, Night Time Economy Advisor for Bristol, terms it, has reshaped audience expectations and operational realities. Production costs have "doubled or tripled" since COVID, according to Chris Goss, Founder, Hospital Records, forcing venues to carefully weigh investment in elaborate staging against financial sustainability. This pressure intensifies as major operators like Live Nation expand their market presence, which Pete Jordan notes has "really upset mid-level promoters. Monopolisation never really helps creativity."

*... [The growth of festivals] creates this incentive to develop a visual show and make it more of a performance...in a club, you can have 200 people in a dark room with a DJ and it can be perfect ...*

*- Shawn Reynaldo, Founder and Editor-in-chief, First Floor Newsletter*

Even the documentation of events reflects this divide. Judge Jules observes that "more DJs have started taking out a videographer with them, which is clearly the preserve only of the wealthier DJs." This creates a paradoxical situation where clubs increasingly ban phones to preserve the atmosphere while simultaneously investing in elaborate visual productions to meet audience expectations for 'Instagram moments'.

Some venues are choosing to scale back rather than compete on production values. James Slater reports that "promoters and venues are crucially needing to prioritise balancing P&Ls, rather than risking large events that might not sell out and not covering costs." This pragmatic approach marks a significant shift from when audiences "used to trust promoters even if we didn't know the names," as Carly Heath recalls, to today's headliner-driven market where production spectacle often overshadows musical curation.

This evolution raises fundamental questions about the role of production in electronic music culture. While high-production events can create memorable experiences, they risk pricing out grassroots operators and emerging artists, potentially narrowing the pipeline for future talent development. The balance between production values and authenticity becomes increasingly crucial. John Irvine's success with Postal in Edinburgh's venue Sneaky Pete's demonstrates how thoughtful music policies can create vibrant scenes without relying on elaborate production. This approach helps preserve the intimate connection between performers and the audience that historically defined club culture.

## 2.5 Community and Safety in Focus

Modern venues increasingly prioritise creating safer, more inclusive environments. Beverley Whitrick emphasises how clubs organically attract community: "A grassroots music venue without necessarily setting out to do so automatically draws people who are non-mainstream together...huge LGBTQ communities naturally gravitate towards these safe spaces." This organic development of safe spaces has been further strengthened by dedicated promoters focusing on marginalised communities. Collectives like Pxssy Palace, HE.SHE.THEY, Daytimers, and Eastern Margins have built substantial followings - collectively reaching over 113 thousand Instagram followers in the UK - demonstrating both the demand for and success of intentionally inclusive spaces in electronic music

culture. This vision of clubs as safe havens for self-expression drives many operational decisions and leads to many positive outcomes.

Venues are increasingly adopting more structured approaches to safety. James Slater describes how Nottingham has systematically improved its nightlife security: "We're seeing night time economy safety standards continuing to grow, with the Business Improvement (its In Nottingham) supporting us with their time, also financially towards valuable training. It has raised standards right across the city." This city-wide coordination between venues, local authorities and Business Improvement Districts demonstrates how the sector is professionalising its safety measures.

## 2.6 Property Pressures and Protection

Rising property values and residential development continue to threaten established venues. Dawid Chocholski of Motion Bristol describes the stark reality: "Motion and The Marble Factory have traded at that site for nearly 20 years. However the lease is due to terminate in 2025 as the Landlord wants to realise his asset. Land development has pushed prices up in the surrounding area to an unfathomable ceiling, giving a false sense of what is achievable from that the space." This pattern repeats across the country, with successful venues often becoming victims of their own impact on local property values.

The pressure on venues reflects broader urban development patterns. Sebastian Glover, Co-founder, FOLD, advocates for creative solutions: "If there was some kind of policy... for the developers to build venues within the new development... that wouldn't necessarily cost the government." Such approaches could help preserve cultural spaces amid gentrification.

## 2.7 Changing Habits

Consumer behaviour continues to shift dramatically, driven by economic pressures, technological change, and evolving social norms. Nightclub revenue has declined by an average of 14% per year over the past two years, while festival revenue has risen by an average of 16%. This indicates that audiences are shifting their spending from clubs to festivals. Kwame Safo observes changing priorities: "They only go out once a month, they pick one big festival rather than Fabric and Ministry on separate nights." This concentration of attendance patterns forces venues to compete more intensely for fewer nights out while fundamentally reshaping the rhythm of nightlife culture.

The rise of home entertainment creates new challenges for venues. As Elijah notes: "Inside is too good... we've got everything at home. You can sit here and watch Korean film. I can order anything, any food from around the world." This competition from domestic comfort pushes venues to offer more compelling experiences beyond just music and drinks.

Alcohol consumption patterns introduce an additional layer of complexity. There is a notable generational shift, with individuals aged 18 to 24 tending to drink less. This trend challenges traditional

venue revenue models built around bar sales. Nadine Noor, Founder, Pxssy Palace emphasises the urgent need for support in this transition: "The government should be helping these businesses transition into a healthier business model" rather than pushing an alcohol-focused approach.

*“... The most pressing issue in nightlife, in electronic music, is finding a business model for a generation who don't drink very much ...”*  
- Jules O'Riordan (AKA Judge Jules), Sound Advice

## 2.8 Looking Forward

The future of UK club spaces depends on their ability to adapt while preserving their essential cultural role. Chris Goss, emphasises the need for collective action: "Everybody in the sector... everybody needs to be committed to getting around a table, needs to be willing to share ideas about how we can evolve things positively again.... otherwise things could become very fractured."

Kwame Safo, Co-founder of BLACMEX, suggests that clubs and festivals could emerge as the primary sources of genuine cultural engagement, as recorded music faces competition from AI-driven commodification and ongoing experimentation with broadcast and pay-per-view events. "The only thing that can save it is being in real life... you see an artist, you feel that energy... you can't replicate that with AI."

Despite significant challenges, the essential role of physical spaces in electronic music culture remains strong. Sofia Ilyas, Chief Community Officer, Beatport, notes the unique loyalty of London audiences: "London fans are so loyal... you might barely do any promotion, and you've got a new record out, you haven't been on the scene for a few years, they'll still be an audience waiting to see you perform." Such dedicated followings help sustain venues through challenging periods.

Success in 2025 and beyond will likely belong to venues that can balance commercial viability with cultural authenticity, technical innovation with human connection, and safety with creative freedom. Chris Goss emphasises the importance of commitment to quality of experience: "We have to be extremely cautious and mindful... we sometimes have to make decisions we don't like." This careful approach to programming and operations may prove key to long-term sustainability.



### Case Study: FOLD London – Reimagining the Modern Music Venue

FOLD exemplifies how contemporary electronic music venues can innovate while maintaining cultural authenticity. As one of London's few 24/7 licensed venues, it demonstrates the potential for new operational models in the UK's nightlife sector.

#### Strategic Development

FOLD's journey to securing a 24/7 licence offers lessons in venue development. Rather than immediately pursuing round-the-clock operation, the team began with extended hours and gradually proved their operational capabilities. This methodical approach built trust with local authorities, eventually leading to the council itself suggesting an application for a 24/7 licence.

### Diversification for Sustainability

The venue has developed multiple revenue streams beyond traditional clubbing. This includes multiple music studios, plans for a restaurant, tattoo parlour, and record store. This diversification helps sustain core club operations while creating a more complete cultural ecosystem.

FOLD has also innovated in its booking policies. Their UNFOLD events operate on a fixed-fee system regardless of artist profile, prioritising musical quality over commercial draw. This approach has enhanced the venue's reputation while supporting artist development.

### Economic Challenges

Despite success in many areas, FOLD faces significant economic pressures common to UK venues. Business rates can amount to half a venue's costs, while rising operational expenses create constant pressure. The venue often absorbs increasing costs rather than passing them to customers to maintain accessibility.

### Cultural Impact

The venue's value extends beyond entertainment. In an increasingly digitised world, FOLD provides physical spaces for genuine human connection. Its impact on music tourism is significant, regularly attracting visitors from across Europe and America who travel specifically to experience London's electronic music culture.

### Support Required

Several interventions could help venues like FOLD thrive:

1. Business Rate Reform: Current rates pose an existential threat to cultural spaces
2. Planning Protection: Better safeguards for cultural venues in development zones
3. Operational Support: Recognition of electronic music venues as cultural assets
4. Investment Support: Mechanisms to help venues improve facilities and programming

FOLD's experience demonstrates that innovative venue models can succeed with appropriate support. However, maintaining these cultural spaces requires both operational innovation and policy reform to ensure long-term sustainability.



## Case Study: Motion Bristol – When Cultural Excellence Isn't Enough

Motion Bristol exemplifies both the heights UK electronic music venues can reach and the existential challenges they face despite their success. Currently ranked among the world's top clubs and capable of hosting 4,000 people, the venue announced in November 2024 that it might be forced to close in July 2025 when its lease expires—a sobering reminder that cultural significance alone cannot guarantee survival in today's economic climate.

### Evolution and Impact

The venue's journey mirrors the organic growth characteristic of significant electronic music spaces. Beginning as a Victorian marble factory, then Bristol's premier indoor skatepark, Motion transformed into a nightclub through careful development from the mid-2000s. Its first electronic music event—where promoters brought revellers by boat to its riverside location—marked the beginning of its evolution into one of the UK's most celebrated venues.

### Operational Innovation

Motion demonstrates remarkable adaptability in its programming. The venue operates a dual seasonal model: summer focuses on outdoor daytime events, while winter brings activities indoors. This flexibility has helped maintain revenue streams while serving different audience needs throughout the year.

However, like many venues, Motion is presented with various operational challenges. General Manager Dawid Chocholski observes a significant change in audience behaviour, stating that there is no longer a mid-range option for bookings. Venues now either need to book popular acts that are guaranteed to sell out or opt for lower-cost performers who might not sell any tickets. This polarisation makes it increasingly difficult to develop new talent or maintain regular programming.

### The Property Crisis

Motion, operating at its current site for nearly 20 years, faces an existential threat as its lease terminates in 2025. While the building maintains Grade II listed status and an entertainment venue designation, the landlord's desire to realise the assets, driven by soaring local development prices, threatens the venue's future. The venue team developed plans to transform the space into a broader cultural hub, incorporating artist studios and creative spaces above the existing venue. However, despite protective measures like deed of easements to shield venues from noise complaints, and the "agent of change" principle applying to nearby developments, these mechanisms alone cannot address the fundamental challenge of lease termination.

### Support Required

Motion's situation highlights several critical issues requiring urgent policy attention:

1. Property Security: Even successful venues need mechanisms to secure their buildings long-term
2. Value Recognition: Cultural spaces often increase local property values but then become victims of that success
3. Infrastructure Protection: Cities risk losing key cultural amenities that make them attractive for development
4. Policy Effectiveness: Current protections like listing status and planning restrictions aren't enough to ensure venue survival

### Broader Implications

Motion's closure represents more than the loss of one venue—it signals the vulnerability of the UK's cultural infrastructure. Despite being profitable, attracting international visitors, and receiving strong local authority support, the venue still faces closure. This suggests current policy frameworks are insufficient to protect even the most successful cultural spaces.

As the UK faces continued losses of established venues throughout the country, Motion's story illustrates the urgent need for new approaches to cultural space preservation in growing cities. Without stronger interventions, the UK risks losing the venues that make its cities vibrant cultural destinations.

## 3. Cultural Heart: Audiences, Subcultures & Accessibility

The diverse scenes, subcultures, and communities of the UK electronic music industry showcase impressive adaptability through shifting consumer behaviours, digital advancements, and economic challenges. Understanding these dynamics is crucial for sustaining the sector's cultural vitality and ensuring its accessibility to future generations.

### 3.1 Scene Mapping and Subcultures

The UK's multicultural character continues to drive innovation. Kwame Safo emphasises: "We're connected via the various hundreds of communities, thousands of communities which already reside within the UK... you've got a cultural powerhouse here."

The evolution of genre boundaries continues to shape the culture. Elijah points to how influences from Afrobeat, Caribbean, and other global sounds create fresh sub-genres and new waves of underground music: "Just because of the differences in immigration history... you have something that is multi-layered... basically it's someone from every nation here." The interplay between local and global influences shapes regional development. Charlie Toller observes: "We do a brilliant dance of taking other genres and making them a bit our own." This capacity for local reinterpretation helps maintain regional distinctiveness.

The landscape spans diverse genres and communities, each with distinct characteristics. Dawid Chocholski highlights how drum and bass has found new momentum, particularly among younger audiences: "We could get a Drum & Bass DJ for 500 pounds and charge 5 on the door, so it stayed busy... Meanwhile, house and techno were 15 or 20." This economic accessibility helps certain genres maintain grassroots appeal.

Though, regional inequalities affect scene development. Elijah notes how London's dominance and lack of investment in other regions threatens overall cultural vitality: "The rest of the cities haven't been invested in as much the people, kind of people, have been left behind... we're not going to build transport links to your city."

*... Beyond the major cities, many places are left without the support and investment they deserve—there are fewer opportunities and very little infrastructure, yet these areas are home to crews and collectives with immense energy and passion to make things happen. Artists and agents should be encouraged to engage with these micro-scenes, bringing visibility, fostering growth, and helping to cultivate thriving cultural spaces beyond the usual hubs ...*

*- Amy Van Baaren, Chief Impact & Culture Officer, Resident Advisor*

## The Evolution of Scene Engagement: A Tale of Two Pathways

Today's electronic music scene reflects a fascinating duality in how people discover and engage with the culture. Traditional pathways through friends, local venues, and physical record stores now coexist with digital-first journeys through streaming platforms, social media, and online communities.

Established fans often describe their introduction to electronic music as a gradual immersion through local venues and word-of-mouth recommendations. Their participation typically involves regular attendance at smaller, community-focused events, with deep knowledge of specific subgenres and strong loyalty to particular venues and promoters. These scene veterans often express concern about maintaining authentic experiences while embracing necessary evolution.

In contrast, newer participants frequently discover electronic music through curated playlists, social media content, and festival livestreams. Their engagement patterns show a preference for larger, production-heavy events and a more selective approach to attendance. However, many demonstrate an equal passion for music and culture, albeit expressed differently through digital platforms and content creation.

Despite these different entry points and participation styles, both groups share core values around community, musical authenticity, and collective experience. The challenge for venues and promoters lies in bridging these approaches while preserving the scene's essential character.

### 3.2 Community and Connection

Electronic music continues to serve as a powerful force for building community and fostering personal transformation. Research by Alice O'Grady, Professor of Applied Performance, University of Leeds, on older women's clubbing experiences, conducted during the pandemic, reveals how deeply these spaces matter to participants: "We hadn't expected the outpouring from these women of loss [during lockdowns]... they experienced real grieving... it was an absolutely fundamental part of their identity." This emotional connection underscores how club culture extends far beyond mere entertainment, providing essential spaces for identity formation and social bonding.

*... Clubs in theory are laboratories...where people can get involved in electronic music and try things out, whether that's DJing, throwing parties or putting on shows. It's where you meet people face to face and forge connections ...*

*- Shawn Reynaldo, Founder and Editor-in-chief, First Floor Newsletter*

Local scenes continue to nurture distinctive communities, and support networks increasingly focus on inclusion and safety. They demonstrate how well-thought-out music policies can create vibrant scenes without relying on elaborate production, fostering strong local followings while attracting

visitors during festival periods. Nadine Noor demonstrates how venues and promoters can establish thorough frameworks for community protection through Pxssy Palace's work: "It took us ages to write that policy... so many people have copied or adapted it... that's good." Their approach to security, accessibility, and inclusion has influenced venues nationwide.

The dancefloor itself remains a uniquely potent environment for collective experience. Amy Van-Baaren describes it as "sacred... it's a microcosm of what is potentially achievable... a bit of a utopia." This transformative potential helps explain why, despite venue closures and economic pressures, demand for authentic dance music experiences persists.

The importance of physical gathering spaces remains paramount. Sebastian Glover, co-founder of FOLD, emphasises how venues serve as crucial "places of meeting, catharsis and letting loose, meeting people outside of a digital environment." This physical gathering function becomes increasingly vital as digital isolation grows. The sound system culture provides unique benefits for mental wellbeing through what Glover describes as "the effect of sound waves on the human body... it's important for the spirit and for mental wellbeing and health."

*"... When we dance together in social spaces, our heartbeats and brainwaves get in sync... it's good for us ..."*

*- Carly Heath, Night Time Economy Advisor for Bristol*

### 3.3 Digital Impact

Social media's influence on electronic music culture remains complex. Nadine Noor highlights how younger audiences often seek familiar tracks, noting, "If back in the day a DJ played a song that nobody knows, they would still appreciate it... whereas with the younger generation, if they don't know it, then it's difficult for them to move... they want to hear things that they recognise, and they're looking for that viral moment."

Contemporary audiences exhibit markedly different social behaviours from previous generations. James Slater observes that younger people are "spending more time alone" and "struggling with connection," which affects everything from discovering new DJs to building local scenes. He notes this shift is particularly visible in how emerging talent engages with the industry - where previously aspiring DJs would actively network and reach out to venues, there's now a noticeable decline in such direct engagement, potentially impacting the grassroots development of new talent.

The rise of digital platforms has influenced the way artists approach music creation. Romy Harber, Global Head Of Dance & Electronic, EMP, Believe, notes "playlist ecosystems have an impact on scenes and sounds... People, whether consciously or subconsciously, end up creating music to fit certain styles or playlists. In terms of track lengths, We're now regularly getting tracks delivered around two minutes." Leigh Morgan, Global Director b:electronic, Believe, adds a point on how these platforms have opened up new opportunities for engagement between artists and fans: "A lot of electronic

music fans are across multiple channels... they're digging for music, rather than being passive." This active engagement helps sustain vibrant online communities.

The ubiquity of phones on dancefloors reveals a deeper shift in how audiences experience events. Sacha Lord observes a stark contrast with earlier club culture: "When I think back to the Haçienda... people weren't even looking where the DJ was. It didn't matter, you were just dancing to the music." Today, he notes how phones create a disconnected experience where "the artist comes out, and you just see a sea of cameras. People aren't dancing." This transformation of audience behaviour has led venues like Manchester's Amber's to implement no-phone policies, which Lord reports are working well through self-enforcement, with audiences embracing a return to more immediate, participatory experiences. Promoter, A Man About A Dog Ltd. Founder & Director of MADE Festival, has a nuanced take on phone usage based on his experience with Super Sonix events that focus on age 16 and above audiences. "Kids today are having as much fun as we did... The basic human needs—connectivity, having fun—are still there. It just might look a little different."

### 3.4 Accessible Entry Points and Pathways

The democratisation of music production technology has transformed how people enter the scene. Alex Branson, SVP, Industry Partnerships, Beatport, observes: "Anyone can release music and build audience... The flip side is that a really good label who understands artist development is far more important." This tension between accessibility and quality curation defines many current debates.

*... The industry is seeing meaningful increases in diversity. More women, non-binary, and diverse producers and DJs are entering the scene. We have far more female producers than ever before ...*

*— Alex Branson, SVP, Industry Partnerships, Beatport*

However, economic barriers increasingly affect participation. Carl Loben notes: "Because property is so expensive, the cost of living so expensive, it's hard for people to make music their chief career path... people have to wear different hats or to have a part-time job." These pressures particularly impact emerging talent.

Sofia Ilyas highlights how many young people struggle to find entry points: "So many young people want to get closer to the music industry, but they just don't know how... the doors feel very firmly shut." This underscores the need for clearer pathways into the industry.

### 3.5 Mental Health and Wellbeing

The relationship between electronic music and mental health gains increasing recognition. Silvia Montello draws attention to an often-overlooked connection between electronic music and neurodiversity: "Since I got my diagnosis, I'm looking around at most of my friends who go raving with me... and we're all neurodiverse as well... it's like we tune into the same BPM and wavelength."

Chris Goss emphasises the need for better support systems for artists mental health and progressive harm reduction approaches. This aligns with Amy Van-Baaren's observation that "Our approach to harm reduction is outdated and counterproductive. It's time to shift away from a rigid zero-tolerance culture and advocate for pragmatic, safety-first policies that genuinely protect and support people."



### Electronic Music as Social Medicine: Building Wellbeing Through Bass

The therapeutic value of electronic music extends far beyond simple entertainment. Regular participants consistently report profound benefits to their mental health and social wellbeing, highlighting the scene's crucial role in supporting personal and collective resilience.

Dancefloors serve as spaces for emotional release and stress relief, with the combination of music, movement, and collective experience creating powerful therapeutic effects. Regular attendees describe finding genuine connection and acceptance within electronic music communities, particularly valuable in an increasingly digitised and isolated world.

Venues have begun recognising and nurturing these benefits through dedicated initiatives: calm spaces within clubs, mental health first aiders at events, and community support networks extending beyond event hours. Some spaces actively collaborate with wellbeing practitioners, recognising how electronic music environments can complement traditional therapeutic approaches.

The scene's emphasis on collective experience and non-judgmental expression provides crucial support for many participants. Whether through regular club nights, daytime events, or festival experiences, electronic music spaces offer rare opportunities for genuine human connection and emotional release in contemporary society.

## 3.6 Looking Forward

The future vitality of UK electronic music culture depends on successfully navigating these various pressures while preserving its essential character. Alternative models are emerging - as Elijah suggests, the scene might need to imagine "how it functions without clubs, because I still feel like it can be a very strong part of people's lives without the club infrastructure... making, creating and sharing can exist without being out at four in the morning."

Beverley Whitrick emphasises that many authorities still treat venues as "places where people go to drink, rather than the draw being the music. Every theatre in the UK has a bar but no one describes them as a bar first." This disconnect between cultural value and institutional recognition remains a crucial challenge. However, the scene's demonstrated ability to adapt while maintaining its core values suggests potential for continued cultural innovation. This resilient spirit, combined with

emerging initiatives around inclusion, mental health, and community building, suggests pathways for sustaining the scene's cultural vitality amid ongoing change.

*... As much as people make fun of Zoomers for not drinking ... maybe that does create an opening for dance music and club culture... to be perceived as less about hedonism and more about art ..."*

*- Shawn Reynaldo, Founder and Editor-in-chief, First Floor Newsletter*

## Case Study: BLACMEX - Building New Networks for Black Music Genres

BLACMEX emerged from a pivotal moment in 2020 when co-founder Kwame Safo wrote a viral Mixmag editorial highlighting the treatment of Black musicians in electronic music. His observation that Black female vocalists were "heard but not seen" sparked wider conversations about recognition and equity in the industry. These vocalists, often brought in merely as session singers, would have their voices featured on hit records while remaining anonymous to the public—their contributions serving primarily to propel the careers of DJs rather than their own.

### Core Innovation: Empathy-Informed Business Model

This recognition of systemic inequity led Safo to envision a new kind of organisation—one that would address fundamental gaps in how Black music genres are exported and connected globally. BLACMEX moves beyond what Safo describes as the "lazy top line" focus on hip-hop to encompass the full spectrum of Black electronic music, from house and techno to UK funky and beyond.

At its core, BLACMEX operates on what Safo terms an "empathy-informed" business model. Rather than pursuing purely commercial objectives, the organisation starts by asking fundamental questions about fair treatment and representation. This approach has proved particularly powerful because it harnesses the UK's unique position as a cultural crossroads. "You've got a cultural powerhouse," Safo explains. "You can plug in all these different communities that already reside in the UK, but the industry doesn't fully capitalise on that."

### International Network Development

The organisation's work demonstrates how the UK's multicultural makeup can drive both musical innovation and economic growth. BLACMEX maps and connects existing diaspora communities within the UK to their international counterparts, creating sustainable trade routes for music genres between countries. This systematic approach helps democratise access to international markets for independent artists and venues.

Perhaps most innovatively, BLACMEX aims not to establish direct operations abroad but rather to enable equivalent organisations in other countries. This approach shares operational expertise while respecting local autonomy. As Safo describes it: "I really hope that I get a phone call and

someone from the US says 'We love your model. Can you come in and show us the skill?' The goal is to create a network where underground communities in Brazil, North America, Nigeria and beyond can establish their own equivalent organisations, leading to genuine cultural and economic exchange.

### Future Vision

BLACMEX's impact offers valuable lessons for the wider electronic music industry. Its success demonstrates how targeted infrastructure building can address historical inequities while creating new opportunities for growth. The case of dubstep's journey from Croydon to America, which Safo cites, illustrates both the massive potential for cultural export and the historical pattern of communities of origin being left behind. BLACMEX's model shows how scenes can grow globally while ensuring fair recognition and compensation for their originators.

By focusing on building networks rather than merely exporting music, BLACMEX is creating sustainable pathways for artistic and economic exchange. Their approach suggests a future where underground electronic music scenes can thrive internationally while remaining rooted in and accountable to their founding communities.



### Case Study: Pxssy Palace – Pioneering Inclusive Nightlife

In 2015, amidst growing conversations about representation and safety in nightlife, Pxssy Palace emerged as a transformative force in London's club scene. What began as a monthly party has evolved into an influential blueprint for inclusive nightlife globally, with founder Nadine Noor's vision extending far beyond the dancefloor.

The platform's trajectory mirrors broader shifts in UK club culture. Starting with mixed audiences, Pxssy Palace gradually sharpened its focus on celebrating Black, Indigenous and People of Colour who are Queer, Intersex, Trans or Non-binary. As Noor explains, "The stronger I got in my identity, Pxssy Palace's identity also became stronger, more queer, more Black, and more brown."

### Pioneering Safety Standards

A defining moment came in 2015-16 when rapid growth exposed safety concerns at their events. Rather than shying away from problems, Pxssy Palace responded by developing a comprehensive policy that would later influence venues worldwide. Their approach includes trained QTIBPOC support teams, clear reporting mechanisms for harassment, and accessibility measures like free tickets for low-income community members.

## Global Influence

The impact has rippled internationally, with promoters from New Zealand to Brazil and South Africa adopting and adapting Pxssy Palace's framework. Noor reflects on the emergence of various cultures within nightlife and queer nightlife as a result, following Pxssy Palace's footsteps. Their policy document has transformed into a useful open resource. Noor highlights the critical role of collaboration and knowledge sharing, noting that developing this policy was time-consuming, and they fully support others to adapt it and make it fit for purpose.

## Musical Innovation

While maintaining strong community focus, Pxssy Palace has also shaped musical trends. Their programming spans genres from UK garage to jungle, reflecting both British dance music heritage and emerging sounds. As Noor observes, "When you go across the world, they want a UK sound. They want a little bit of grime in there; they want jungle."

## Future Directions

After a decade of growth, Pxssy Palace is intentionally scaling down, prioritising intimacy over expansion. "If I'm true to what I believe in, which is the small club is dying, and everyone wants to go bigger and bigger, and with scale you lose integrity... that is going smaller and supporting smaller venues," explains Noor. Their evolution offers crucial lessons for the wider electronic music sector:

- Community responsiveness drives longevity
- Safety and inclusion policies can catalyse industry-wide change
- Cultural authenticity need not be sacrificed for growth

As UK nightlife faces ongoing challenges, Pxssy Palace demonstrates how venues and promoters can build sustainable, community-focused models that prioritise both cultural preservation and progressive change.

## Case Study: Super Sonix – Creating Electronic Music's Next Generation

As electronic music culture enters its fourth decade of mainstream presence, the industry faces a crucial moment in cultivating its next generation of participants. This case study examines Super Sonix, a pioneering initiative that's tackling this challenge head-on while highlighting broader trends in youth engagement with electronic music.

## The Youth Initiative

Launched in 2017, Super Sonix represents a focused effort to introduce younger audiences to electronic music culture. Operating in Birmingham, London and Bristol, these 16+ events have seen remarkable success, with some shows drawing up to 3,500 attendees on weekday evenings.

"We identified interest in that age group for electronic music," explains Pete Jordan, one of the architects behind Super Sonix. "What's been very encouraging is that we do know youngsters want to go out dancing. They want to consume electronic music."

## Cultural Preservation Through Safety Innovation

Super Sonix's approach goes beyond mere entertainment, implementing comprehensive safety measures that set new standards for youth-focused events. The initiative has:

- Introduced specialist safety personnel
- Developed enhanced risk assessment protocols
- Created targeted safety messaging
- Implemented extensive staff training programmes

This safety-first approach has proved successful, with the events managing over 21,000 attendees in Birmingham alone over a two-year period.

## The Next Generation's Relationship with Electronic Music

Contrary to common criticisms about younger audiences, Jordan's observations reveal that fundamental aspects of electronic music culture remain intact: "The basic human needs, such as connectivity, finding a partner, having fun and engaging with it - it's still there."

While social media and technology have changed how young people interact with music culture, their enthusiasm remains undiminished. The challenge lies not in their interest but in economic accessibility.

## Industry Challenges and Opportunities

The case study identifies several key challenges facing youth engagement in electronic music:

1. Economic Barriers
  - Rising ticket prices
  - Increased transport costs
  - Overall cost of living pressures
2. Industry Evolution
  - Market saturation in venues and events

- Need for new promoter development
- Changing consumption patterns

### Preserving the Future

The future of electronic music culture depends on successfully nurturing new participants while preserving its core values. Super Sonix demonstrates that with proper support and structure, younger audiences eagerly embrace electronic music culture.

However, the industry must address several key areas:

- Maintaining affordable entry points
- Supporting new promoter development
- Preserving regional variety and local scenes
- Balancing commercialisation with cultural authenticity

As Jordan notes: "We have an opportunity to preserve this industry, we do that by being inclusive, trying to encourage people and not out-pricing them."

### Conclusions

Super Sonix presents a viable model for youth engagement in electronic music culture. Its success shows that young people's appetite for electronic music remains strong, but the industry must evolve to meet their needs while maintaining appropriate safeguards.

The case study suggests that the future of electronic music culture relies not just on attracting young audiences but on creating sustainable pathways for their participation – both as consumers and future creators.

## 4. Global Heart: UK's International Influence

### 4.1 Export Power and Digital Reach

The UK electronic music sector's international influence extends far beyond its domestic market size. Leigh Morgan emphasises this export strength: "On average, somewhere between 80 and 90% of the revenue is actually coming outside of the UK. So it's a huge export in terms of genre for UK artists and labels." This reach spans both established markets and emerging territories, with UK sounds, artists, and operational expertise in high demand globally. Taking the 2024 DJ Mag top 100 DJs, 8 are from the UK, placing the UK in joint 3rd place (with the US) out of the 26 countries represented, behind only the Netherlands and Germany. The 8 UK DJs featured in the chart generate 808K searches a month across Google and YouTube in the 9 key countries for Electronic music we analysed. Furthermore, they boast a combined total of 3.1M Instagram followers across the 9 countries.

Digital platforms have amplified this international presence. Boiler Room, an online music broadcaster and club promoter based in London, boasts a similar level of international demand to global superstars such as DJ Snake, Marshmello and Calvin Harris. While its 331,000 YouTube subscribers in the UK alone is impressive, the platform's true power lies in its international appeal, with 1.9 million subscribers across 9 other key markets, demonstrating the platform's ability to export UK electronic music culture globally. This global digital dominance extends beyond broadcast platforms. Leading industry platforms Resident Advisor and Beatport, both deeply rooted in UK electronic music culture, have achieved international demand levels comparable to legendary artists like Tiesto, demonstrating how UK-based platforms have become essential infrastructure for the global electronic music ecosystem.

*"... We've still got some of the biggest exports ever... we've still got DJs who travel every weekend working ..."*

*- Brandon Block, DJ and Motivational Thought Coach*

The recent \$1.4 billion acquisition of Boiler Room by Superstruct Entertainment also underscores the commercial value of UK-originated electronic music platforms. However, this consolidation also raises questions about maintaining cultural authenticity at scale. As international investment grows, British promotional models and curatorial approaches increasingly shape how electronic music is presented worldwide.

Wez Saunders from Defected Records illustrates this global reach: "We've been doing about 300 events a year, past couple of years in pretty much every continent." This expansion demonstrates how UK brands can successfully scale internationally while maintaining cultural credibility.

## 4.2 Cultural Innovation and Genre Evolution

The UK's position as a global tastemaker stems from its unique role as a cultural melting pot. VML's Charlie Toller observes, "We're very diverse...there's lots of different cultures embedded within our culture...our culture is really good at allowing that kind of intersectionality."

Leading UK institutions exemplify this global influence. Defected Records has established remarkable international reach, particularly in English-speaking markets, including the US, Canada, Australia, and South Africa. The label's social media presence tells a compelling story of international impact – while maintaining a strong domestic base of 363 thousand Instagram followers in the UK, it has cultivated an additional 430 thousand followers across 9 other key markets, demonstrating how UK brands can successfully build global communities while maintaining local authenticity.

### Cultural Model Export

Beyond music alone, British club culture's operational and community models have achieved global recognition. Nadine Noor highlights how Pxssy Palace's inclusive approach has inspired venues worldwide: "People worldwide – Australia, New Zealand, South Africa, Brazil – have used [our] formula to create nightlife in their own image." This influence extends to safety policies, community-building approaches, and explicit codes of conduct that promoters abroad are increasingly adopting.

The success of these cultural exports demonstrates how UK club culture's social innovation resonates globally. "New Zealand parties... said they wouldn't have started if it wasn't for Pxssy Palace," Noor notes, illustrating how British approaches to inclusivity and community-building are reshaping nightlife worldwide.

### Genre Evolution and Cross-Pollination

Carl Loben provides context on musical innovation, "house and techno came from America...but the UK reinterpreted it and gave it back to mainstream America." Duncan King adds, "We might not have started electronic music, but we're definitely the incubator ... anything that blows up here will be huge in the US in a few years." While genres like house and techno may have originated elsewhere, British reinterpretation often defines how these sounds evolve globally.

*... it's amazing to see these, what were niche genres grow up and become multi-million dollar industries which spread their wings from the UK ...*  
– *Romy Harber, Global Head Of Dance & Electronic, EMP, Believe*

This creative dynamism benefits particularly from the UK's multicultural makeup. Richard Chater explains: "People from former colonies, people from the US bringing funk or disco... it all gets put in a

grinder. That's where so many UK scenes come from." This process of cultural fusion remains a key driver of the UK's continued global influence.

### 4.3 Media Amplification

The UK's influence in electronic music extends far beyond its geographical size, powered by a concentrated ecosystem of English-language media outlets such as DJ Mag and Mixmag that shape global discourse. This "media megaphone," as industry expert Shawn Reynaldo describes it, allows "UK scenes and artists to have an impact that far outstretches their actual size," creating a powerful amplification effect for British artists, scenes, and cultural innovations.

Several structural advantages reinforce this position: the UK music industry's early embrace of electronic music, geographic proximity to Europe, and English's role as the lingua franca of global culture. "The UK Music Industry embraced electronic music in a way that the US didn't," Reynaldo notes. "Even people in the UK that didn't grow up as Club kids or ravers still knew about this music." This early acceptance, combined with London's position as a media hub, means that even local UK developments can become global talking points - "When a major club closes in Bristol... because of the way the media is structured, it becomes global news."

While digital platforms and social media have democratised some aspects of music promotion, the UK's established media infrastructure remains influential in curating and contextualising electronic music culture. This creates both opportunities and challenges as the industry seeks to balance British media's powerful promotional reach with the need to platform diverse perspectives and emerging scenes worldwide.

### 4.4 The Talent Paradox

International success has created unexpected challenges for the UK scene. Kwame Safo observes a critical disconnect: "Dubstep got to the US and created this huge industry... but how many of the originators really saw the benefits?" This dynamic particularly affects mid-sized venues, which often can't compete with international booking fees.

Chris Goss notes how the global success of drum and bass creates domestic challenges: "We're seeing growth on drum and bass in the States, which pushes fees up here and means we lose talent to other markets." This separation between grassroots scenes and international success stories threatens the organic development process that has historically sustained UK electronic music.

## 4.5 Market Dynamics and Growth Territories

### Emerging Markets

Southeast Asia and the Middle East represent significant growth opportunities. Duncan King explains: "Saudi's a great example... They're trying to build this electronic music community out there, and they've gone to well-established English promoters and industry to help them build the right version of it." These emerging markets often seek both musical content and operational knowledge.

### Digital Platforms

UK maintains strong influence through digital channels, given the accessibility of electronic music as a genre. Beatport's Alex Branson adds context: "Dance music is unique because unlike almost any other genre, the person making the recording is also the songwriter, is also the performer... that rights ownership is far more streamlined than it is in pop and rock." This simplified rights structure has helped UK electronic music adapt rapidly to global digital opportunities.

### Market Evolution

The international market for UK electronic music continues to evolve in unexpected ways. Traditional export markets like Europe and North America remain strong, but emerging territories in the Middle East and South East Asia increasingly drive growth.

This global demand creates opportunities but also challenges. While international success brings revenue and recognition, it can strain the domestic scene's ability to nurture new talent and maintain community connections. Finding ways to balance global growth with local sustainability remains a key challenge for the sector

## 4.6 Recognition Gap

A striking disconnect exists between international recognition and domestic support. Professor Alice O'Grady from the University of Leeds captures this paradox: "We're the envy of many countries, but we don't value what we've got." This misalignment creates a situation where British electronic music achieves greater recognition abroad than at home.

*... When you travel to other countries people say 'You don't know how lucky you are'... it's made me realise how much we take for granted ...*  
- **Sofia Ilyas, Chief Community Officer, Beatport**

*... Another artist that's probably worth mentioning is Hayla. She is a UK artist who's having most of her success at the moment in the US. She's been doing massive shows out there. She's had tracks with*

*John Summit and Kygo and various other big stars. She's had a huge huge support from the DSPs, from radio, from everyone in the US. And actually the UK is now starting to catch up about 2 years down the line ..."*

*- Romy Harber, Global Head Of Dance & Electronic, EMP, Believe*

Carl Loben reinforces this point: "The electronic music industry...is a billion pound industry. It's one of the principal things that the UK exports, which is why it should have more support." Yet domestic policy often fails to reflect this cultural and economic significance.

#### 4.7 Looking Forward

Looking ahead, the UK's global position appears both robust and precarious. Shawn Reynaldo, Founder and Editor-in-chief, First Floor Newsletter, observes: "The UK has cultivated this media megaphone that allows its scenes and its artists to have an impact that far outstretches their actual size." However, sustaining this influence requires addressing domestic challenges.

Sebastian Glover from FOLD offers a hopeful perspective: "As a country, our biggest impact is culture, and you start hearing UK music all over now... it's the biggest advertisement for Britain." This cultural capital remains strong but requires nurturing through policy support and infrastructure investment to maintain the UK's position as a global leader in electronic music.

## 5. Fostering the Future: Building Tomorrow's Scene

The electronic music scene's continued vitality depends on nurturing new talent, protecting vital infrastructure, securing policy recognition, and ensuring broad cultural access. Despite substantial challenges such as venue closures and changing consumer behaviours, the industry shows impressive resilience and ingenuity in creating solutions.

### 5.1 Secondary Education and Talent Development

Electronic music education requires systematic integration into formal education while maintaining connections to grassroots scenes. As Kwame Safo notes: "There was a time you'd see new talent creeping in... now there's a gap, and it's tougher for fresh faces to break through."

Key development areas include:

- **Integrating digital audio workstations and music technology into standard music curricula**  
Many schools lack essential technology infrastructure, and traditional music educators often feel unprepared to teach electronic music production. However, successful models exist through music education hubs partnering with technology companies to provide both equipment and training. These partnerships can help standardise access to music technology across schools.
- **Expanding partnerships between venues and educational institutions**  
This creates vital real-world experience opportunities. Sacha Lord emphasises: "What Europe does really well is they recognise working in this sector is a vocation... We don't do that in this country." These partnerships could help professionalise careers in electronic music.
- **Supporting alternative education pathways**  
Particularly crucial for engaging diverse young talent. Duncan King emphasises: "Electronic music is still very tribal... you'll get larger groups all attending. It's very cool to be into it, so you kind of want to be there." This natural affinity makes electronic music an effective tool for alternative education but requires structured support to harness its potential.
- **Developing structured mentorship programs**  
Michael Grieve highlights how current systems overlook key talent: "Someone can tour the world and get loads of recognition, while the resident DJs actually making it work week to week go under the radar." Mentorship can help bridge this recognition gap.

- **Onboarding the next generation**

Youth and university events are the key places to welcome the next generation, establish new norms, find and develop talent. Pete Jordan notes "In a two-year period in Birmingham, we did 21,000 people, aged 16-18, through the doors... These shows honestly are spectacular because they remind you of enthusiastic music lovers having the time of their life."

## 5.2 Scene Infrastructure and Economic Sustainability

The physical infrastructure supporting electronic music faces unprecedented pressure. As Chair of Birmingham's Southside District, Lawrence Barton notes: "Despite all the lobbying...there's been no VAT release, there's been no duty relief on alcohol...there just doesn't seem to be a connected care about what is happening with the sector."

Priority actions include:

- **Establishing tiered VAT rates based on venue size/turnover**

Sacha Lord proposes: "If I was the chancellor, I'd tier it... if your turnover is below 5 million, you pay 15%... anything over 5 million, you pay 20%." This would provide crucial support for independent venues.

- **Developing multi-use venue models**

Sebastian Glover's FOLD demonstrates this approach: "We have music studios... about to open a restaurant, a tattoo parlour, record store... got a community of artists." This diversification creates more sustainable business models.

- **Creating protected status for culturally significant venues**

Nadine Noor advocates: "I would like our government to follow the Amsterdam or Berlin method where nightlife is seen as a protected art, and certain venues across London are protected." This would preserve vital cultural spaces.

## 5.3 Policy Recognition and Support

Current policy frameworks often fail to recognise electronic music's distinct needs. Essential policy developments include:

- **Appointing electronic music representatives as statutory consultees**

Beverley Whitrick highlights the current gap: "Music Venue Trust had a 97.6% success rate on planning objections in the last year. However, those are the ones we know about, and because we're not a statutory consultee, we have to go looking for these planning stats that will impact venues. Nobody tells us automatically. And while the theatres trust being statutory consultees,

if anything happens with a planning application that impacts a theatre, they are automatically informed and have time to submit their objections."

- **Developing mandatory night-time economy strategies**

Carly Heath points to London's example: "London's local plan now mandates all 33 boroughs to have a night-time economy strategy... I can't think of another city in the country that does that." This model of requiring local authorities to develop specific nightlife strategies could be replicated nationwide to ensure consistent support for electronic music venues and events.

- **Establishing dedicated export support**

Silvia Montello highlights this opportunity: "We should really be looking at trade missions to targeted *emerging* markets where there is a lot of interest already in dance and electronic genres and really helping to bring some of our brilliant homegrown talent to those markets." This focused approach to export support could help UK artists maintain and expand their global reach, particularly important as the sector adapts to post-Brexit realities.

- **Creating a national music strategy**

As Carly Heath advocates: "I think there needs to be a national music strategy that isn't just about saving venues... we are a culture. We are a cultural entity. Nightlife is the seedbed of British music, we need a national plan not just to preserve, but to innovate and grow." This would position electronic music as cultural infrastructure rather than just entertainment, enabling access to broader support mechanisms.

## 5.4 Cultural Investment and Inclusion

Ensuring broad participation requires deliberate investment. Silvia Montello emphasises: "The community aspect of raving was one of the things that a lot of people really, really missed during lockdown... It was bad for people's mental health to not be able to go out, dance and express themselves together with their friends, let go of the stresses in their lives."

Key initiatives should include:

- **Supporting grassroots organisations focused on underrepresented groups**

Kwame Safo speaks directly to this need through his experience with BLACMEX: "If we can link the UK to Nigeria, Brazil, North America... we can build networks where new artists aren't taking a blind risk." His insight shows how targeted support for grassroots organisations can create sustainable pathways for underrepresented artists while strengthening the UK's global cultural connections.

- **Funding research into music's wellbeing benefits**

Silvia Montello suggests: "We should be looking at more funding and research into the music's wellbeing benefits, not just as something where loads of people go out and go crazy at night,

it's so much more powerful than that" This research could help justify greater public support and change perceptions of electronic music's value.

## 5.5 Public Health and Safety Infrastructure

The electronic music industry is recognising the necessity for public health strategies to ensure community wellbeing. Bristol's partnership with The Loop, establishing it as the only UK city with a permanent drug-checking service, alongside a city-wide Harm Reduction policy, illustrates the successful integration of public health frameworks into nightlife.

Key developments should include:

- **Establishing city-level harm reduction partnerships**

Michael Grieve observes: "The initiative that people like The Loop have been doing of allowing for the testing of ecstasy pills on the premises of bigger venues...police and local authorities are recognising that this isn't criminality, it's a safety measure." This shift from criminalisation to public health approaches shows promising results.

- **Developing mental health support infrastructure**

Brandon Block emphasises: "People struggle with their mental health... you have to manage it... it has to be respected." Venues and events need structured support systems for both audiences and performers.

- **Creating joined-up wellbeing strategies**

James Slater highlights the need for comprehensive approaches: "We don't hide the culture of drug taking. Instead, we want to address it. The dream is to have testing, so people know what's in what they're taking and that what they're taking has less potential to cause serious harm." This requires coordination between venues, health services, and local authorities.

## 5.6 Looking Forward

The future of UK electronic music depends on coordinated action across these areas. Success requires protecting what works – the creative energy of grassroots scenes, the drawing power of major events, the innovation of independent operators – while embracing necessary change.

Essential to this is maintaining the balance between commercial viability and cultural authenticity that has long characterised British electronic music. This means supporting both large-scale events that demonstrate the scene's economic power and smaller spaces that nurture new talent and ideas.

The sector's demonstrated ability to adapt and innovate, even in challenging circumstances, provides confidence that with appropriate support and recognition, electronic music can continue as a vital force in British culture and a significant contributor to the creative economy.

However, this positive future depends on decisive action now – to protect venues, develop talent, secure policy support, and ensure broad access to participation. The solutions and recommendations outlined here provide a framework for that action, drawn from the practical experience of those working across the sector.

The electronic music scene's future will be shaped by how effectively these challenges are met and opportunities seized. With coordinated effort across industry, policymakers and cultural organisations, that future can be both commercially sustainable and culturally vibrant.

## 6. Conclusion

The UK's electronic music industry remains a vibrant economic and cultural force that continues to shape our creative identity at home and abroad. Despite challenges posed by rising operational costs, changing consumer habits, and urban development pressures, the sector demonstrates remarkable resilience. Independent labels, clubs, and festivals adapt by diversifying revenue streams, prioritising community engagement, and embracing inventive business models. Large-scale festivals and mega venues contribute to national revenues and international visibility, even as their prominence challenges smaller grassroots operators. Nonetheless, the capacity for **innovation** and **collaboration** across this ecosystem—spanning promoters, artists, and music businesses—proves that growth and **cultural authenticity** need not be mutually exclusive.

In its **physical heart**, UK club culture has seen a stark division between super-sized spaces and grassroots venues, underscoring the fragility of the middle ground. Yet the evolution of community-oriented projects, earlier shows, and phone-free policies points to a sector continually recalibrating how audiences connect and participate. Higher production values and intensifying competition have pushed many operators towards fresh ways of delivering memorable experiences, underscoring the enduring need for **inclusivity** and **safety**. Nightlife remains a cornerstone of cultural expression, reflecting the UK's capacity for **creative fusion** across many genres and subcultures.

At the **cultural heart**, subcultures thrive, serving as genuine communities for expression and identity formation. Younger audiences often gravitate towards large-scale, social-media-driven events, while older audiences view nightlife as a cherished lifeline for community and wellness. Promoters and collectives—particularly those prioritising underrepresented groups—illustrate how thoughtful, **empathy-informed** policies and practices can preserve safe environments. The trend towards inclusive programming, better mental health support, and the championing of emerging voices helps to ensure that electronic music remains accessible and relevant to new generations.

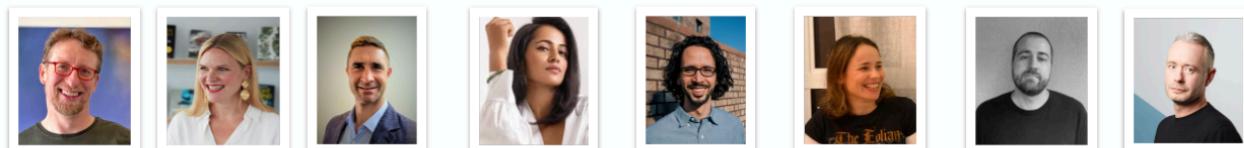
Finally, at the **global heart**, British electronic music continues to punch above its weight. Digital platforms, record labels, and festivals exported abroad carry the UK's distinctive music heritage to markets worldwide. Yet domestic policy and infrastructure must catch up. Enhanced government support, reform to business rates, and recognition of night-time culture's broader societal value would better equip the sector to thrive. By enacting sustainable funding models and education programmes, the UK can maintain its **leading position** in electronic music, ensuring that both **economic returns** and **cultural richness** flourish.

Viewed in its entirety, the electronic music scene showcases a dynamic cycle of **adaptation** and **reinvention**. No single intervention alone will secure its future; success will rest on collaboration and a shared commitment from government, business, and cultural organisations. With the right support, the UK's electronic music industry can continue to bring economic vitality, create inclusive communities, and captivate audiences at home and around the world.

# Appendix 1: About Audience Strategies

Audience Strategies helps brands grow by developing data-driven strategies and capabilities to better understand and engage with their target audiences. The company combines rigorous data analysis with creative thinking to uncover actionable insights about audiences and their behaviours. Working across sectors from entertainment to retail, Audience Strategies specialises in data strategy, audience segmentation, brand positioning, partner selection and data-driven storytelling, with a focus on building long-term capabilities within client organisations. The company has pioneered innovative approaches to understanding audiences through the thoughtful application of new technologies, while maintaining an unwavering commitment to truth and accuracy in their analysis and recommendations.

Their 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. Audience Strategies has written / supported reports including the annual IMS Business Report, this annual NTIA UK Electronic Music Report and the annual Trapital Report. The team has also produced the [PROMPT, practical guide to ChatGPT](#) series.

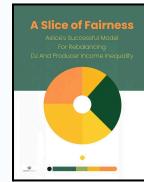


David Boyle	Louisa Livingston	Richard Bowman	Ruffy Anam Ghazi	Simon Jacobs	Eva Szokol-Humay	Ethan Holben	Charlie Palmer
<b>Brand and Corporate Strategy</b>	<b>Segmentation</b>	<b>Music Research</b>	<b>Analytics</b>	<b>Survey Research</b>	<b>Music Research</b>	<b>Creative Strategy</b>	
David has 25+ years of experience developing audience intelligence, data, AI and strategy capabilities that have changed the culture and economics of the world's most prestigious luxury brands and some of the biggest entertainment brands in the world.	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 has 20+ 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.	Ruffy is a Music Tech Specialist and Research Analyst with extensive experience in product strategy and music market research. Her background includes impactful roles at TikTok (ByteDance) and Amra (Kobalt), where she excelled in product development and strategic partnerships.	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 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.	Ethan has 20+ years of experience in marketing and content strategies across music and media. His expertise is developing audience-focused initiatives across digital channels. His background includes roles at Red Bull Music Academy, BBC and Aslice, specialising in data-driven growth.	Charlie Palmer brings 20 years of broadcast media expertise, having shaped pioneering campaigns and editorial for both BBC and Channel 4. He now channels his brand-building experience into Haus of Nige, a social enterprise supporting underground music and culture.
							 AUDIENCE STRATEGIES

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Dance Music Trends and Valuation | [2024 Report](#) | [2023 Report](#)

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Culture Report | [summary](#) | [complete](#)

Jaguar's Gender  
Representation  
in UK Dance Music  
Report | [link](#)

## Appendix 2: Scope and Definitions

Defining terms and concepts is 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.
- **Demand:** A measure of consumer interest and engagement as measured by Audience Strategy's Pulse product. It combines measures such as search volume, social media followers and url traffic to compare demand talent, brands and IP.
- **Key electronic music countries:** In analysing demand for music artists, nightclubs, promoters and record labels, we focused on a sample of 10 countries that are key markets for electronic music: The UK, Germany, France, the USA, Canada, Brazil, Mexico, South Africa, India and Australia.