NTIA NIGHT TIME INDUSTRIES ASSOCIATION X AUDIENCE STRATEGIES

Electronic Beats, Economic Treats

The benefits of the electronic music industry to the UK

How electronic music keeps the UK economy thriving

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

9th February 2023



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Overview

This report was commissioned by the NTIA to fully understand, for the first time, the economic contribution and the cultural significance of the electronic music industry to the UK economy. It was written by David Boyle of Audience Strategies, an agency that uses data to help artists and brands to understand their audiences and trends.

Electronic music has become one of the most popular genres in the UK, with a significant impact on the music industry, the economy and the UK's reputation worldwide. From recorded music and publishing to live concerts, events, and festivals, electronic music has taken the UK by storm. This report explores the economic impact of electronic music in the UK, including nightclubs, concerts, and festivals, as well as the benefits to communities and culture. The report then explores the impact of electronic music on strengthening communities and inspiring culture more broadly. Additionally, the report identifies the challenges faced by the electronic music scene, including licensing, zoning, and gentrification, and suggests potential solutions for supporting electronic music in the UK.

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

As the beat of electronic music continues to ripple through the UK, it's time to take a closer look at the impact this genre and its industry have on our economy and culture. Our goal with this report is to shed light on the value of the electronic music industry, demonstrate its significance, and highlight the challenges and opportunities it presents.

Our main objective is to work towards building funding mechanisms for artists and DJs, as well as supporting grassroots electronic music venues and promoters. But more importantly, we aim to look towards building a stronger platform for education to secure the industry in the future, given the talent pipeline gaps.

We aim to paint a picture of the electronic music industry, from the dancefloor to the recording studio, and to showcase the diverse and dynamic talent that drives it forward. We will explore the economic impact of electronic music, from recorded music and music publishing to live concerts, events, and festivals, and the role electronic music nightclubs play in bringing people together and fostering inclusivity and tolerance.

This report will also examine the importance of education in securing the future of the electronic music industry, and the impact of gentrification, licensing, and zoning regulations on the industry. We want to inspire the government and industry stakeholders to support the continued growth and success of electronic music and to help build a stronger platform for education, innovation, and community engagement.

Our goal is to bring electronic music out of the shadows and into the spotlight, to showcase its impact on the UK economy and culture, and to inspire action to support its continued growth and success.

Summary

Electronic music is electrifying the UK economy, providing a current of economic, cultural, and community benefits. The first ever UK electronic music industry report shines a light on the powerful impact of this genre on the nation.

Electronic music has become **one of the most popular genres in the UK**, with a significant impact on the music industry and the economy. From recorded music and publishing to live concerts, events, and festivals, electronic music has taken the UK by storm. This report explores the economic impact of electronic music in the UK, including nightclubs, concerts, and festivals, as well as the benefits to communities and culture. Additionally, the report identifies the challenges faced by the electronic music scene, including licensing, zoning, and gentrification, and suggests potential solutions for supporting electronic music in the UK.

Electronic music has had a significant impact on the UK economy, contributing to the music industry and providing employment opportunities. The UK is the second largest music exporter globally, with 10% of all music streams worldwide attributed to British musicians. Exports of recorded music from the UK hit a record high of £590.8 million in 2021, with £41.2 million being electronic music. Across recorded music, publishing, and exports, electronic music is worth £181.7 million. **The total measurable economic impact of electronic music in the UK, including concerts, festivals, and nightclubs, is estimated at £2.63 billion.** Live electronic music, including concerts, events, and festivals, is a popular form of experiencing electronic music, with electronic music as the most common genre in UK festivals, making up 29% of artists performing (Rock: 22%, Pop: 21% are second and third). Over 2.4 million people attended UK festivals with electronic music in the last 12 months. Nightclubs provide a space for people to come together and experience music, generating significant revenue through tickets, drinks, and other products. The UK's electronic music education industry is also thriving, teaching the next generation about the history, evolution, and skills of producing and performing electronic music.

There are vast unmeasurable benefits, also. Electronic music not only brings financial gains but also **contributes to communities and culture. Nightclubs serve as a platform for local artists, inspiring creativity and artistic innovation and fostering inclusivity and tolerance.** However, the UK's electronic music scene faces several challenges, such as licensing, zoning, and gentrification, which limit the number of electronic music nightclubs and increase their operational costs. There are significant concerns about the decline of physical spaces for electronic music and its impact on cultural significance. The future of electronic music in the UK will be determined by how these challenges are addressed. The report suggests that **the UK government could support electronic music by appointing a nighttime advisor, reducing regulatory burdens, providing financial support, promoting the UK as a destination for electronic music, encouraging community involvement, investing in electronic music education, and addressing gentrification and redevelopment.**

The COVID-19 pandemic had an accelerating effect on the electronic music scene, with **29.3% of UK nightclubs closing their doors since the start of the pandemic**. This loss has a negative impact on the electronic music culture, limiting opportunities for people to discover new sounds and styles and safe spaces for communities to enjoy music and socialise.

But while the UK's electronic music scene faces several challenges, potential solutions exist, such as reducing regulatory burdens and providing financial support, which could help support electronic music in the UK. The benefits of electronic music go beyond just financial gains, contributing to communities and culture and serving as a platform for local artists and fostering inclusivity and tolerance. Let's support the electronic music scene and keep the UK economy humming to the beat of electronic music.

Key facts[1]

This section provides an overview of the popularity, value, and impact of electronic music in the UK, covering various aspects such as its ranking among other genres, its representation among popular artists, its worth in recorded music and music publishing, its presence in festivals and nightclubs, and its overall economic contribution.

- **2nd** most popular genre in the UK Top 10. Electronic music overtook hip-hop and is behind only pop music
- **33%** of the most popular artists in the world have 'dance' as one of the genres they produce, but not their primary genre
- **£181.7m:** Electronic music in the UK is worth about £79.0m in recorded music and £40.7m in music publishing. We calculate that electronic music exports are worth £41.2m and that another £21.2m of publishing is earned on top, totalling £62.4m.
- **1st** most popular genre in UK festivals. 29% of artists performing at UK festivals are electronic music artists
- **103.0m** nights out based on electronic music. Made up of 96.2m in nightclubs, 2.5m in festivals and 4.4m in electronic music concerts and events outside of festivals and nightclubs
- **29.3%** of UK nightclubs have been lost since the pandemic. That's 365 lost clubs
- **2.4m people** attended 145 UK festivals with electronic music on the bill in the last 12 months. 67% of these were 'primarily electronic festivals
- **£519.3m** is the economic value of festivals with electronic music on the lineup
- **£272.3m** is the economic contribution of electronic music concerts and events outside of festivals and nightclubs
- **£1,657.4m** is the economic contribution of electronic music nightclubs
- **£2.6 billion** is the total measurable impact of electronic music on the UK across recorded music, nightclubs, festivals and concerts

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

[1] Source: Audience Strategies analysis. Based on the latest data available from each source. Usually, 2022. Check each section of the report for precise data and time periods used

Scope and definitions

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

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

Contributors

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

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

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

Data and analysis

- Ted Mulcauley and Ashley Cairns at CGA by NielsenIQ
- Vasja Veber at Viberate for data on festivals and music listening
- Chris Carey at LIVE (Live music Industry Venues & Entertainment)
- Paul Williams, Leon Neville, Gennaro Castaldo and everyone at the BPI for their recorded music stats and analysis

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- Pete Jordan, Director / Founder of Weird Science & MADE Festival
- Peter Marks, Chairman, REKOM UK
- Robert Masterson, CEO, Mustard Media
- Samantha Blakey, Head of Marketing, Coalition Presents
- Tony Rigg, Music Industry Advisor, Practitioner, Consultant, Educator and Researcher with the University of Central Lancashire

Forewords

Michael Kill, CEO of NTIA



Electronic music is one of the UK's understated phenomena, it shapes and embraces communities, educates, inspires and unites the UK with its unique form of culture.

For the last two years, we have been formulating a strategy to deliver this report alongside key stakeholders and leaders in this space to substantiate the true economic, community and cultural value of the electronic music sector.

The foundation of this work was born from the realisation during the pandemic that the Government has a limited understanding of the industry but also considers the responsibility of the sector to educate decision-makers.

This was highlighted when the Government's financial support in the UK excluded electronic music from its initial scope as part of the wider Cultural Recovery Fund through the Arts Council.

Through the efforts of millions of electronic music supporters, we convinced the Government to recognise the importance of counterculture and include the sector in its support.

We hope that the Government, through industry insight, will have a greater understanding of the sector, and support it in a way that cements its future in British culture.

Yousef, DJ, Producer and Promoter



The cultural, social and economic impact of electronic music globally for over 30 years simply can not be understated. The width and diversity of the art and, as importantly, professional opportunities continue to expand and solidify daily. For an industry that has been born from a grassroots and an almost spontaneous counter-culture movement, it's grown into the most wide-reaching and accessible and dynamic music genre possibly of all time. No other genre offers such possibilities to literally all walks of life, from teen ravers in their bedrooms naively knocking out unexpected number ones to the Grammys (finally) embracing electronic music as the mainstream. It is a scene that continues to evolve and prepare for the long-term future while feeling like it's only just beginning.

DJs, Producers, Record Labels, A&R, Managers, PR, Event Production, Radio, Streaming, Mixdowns, Mixing, Mentorship, and literally a 100 more surrounding contributors to the most important musical movement since rock & roll ...

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

Jeff Smith MP, Labour MP for Manchester Withington



Electronic music is the lifeblood of our world-class nightlife. I'm proud to represent a constituency in Manchester, a city which has been at the forefront of electronic music, home of the Hacienda in the 80s and 90s, and with a scene that continues to thrive with the likes of the legendary Warehouse Project. As a former DJ, I've experienced the benefits of this first-hand, not just for culture and community but for our economy. I welcome this report and hope it will be used to better enable electronic music to thrive in the UK.

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

0. Summary

1. The importance of electronic music to the UK economy

1.1. Recorded electronic music and music publishing

Electronic music is entering a growth phase in the UK, as people seek new and innovative forms. Dance music has become the second most popular genre in the UK, with electronic music accounting for over a quarter of the Top 10 hits in 2022. The growing popularity of dance music is powered by both UK and international artists, including female artists and global superstars like Beyoncé and Drake. Electronic music has had a significant impact on the music industry beyond just electronic music artists, influencing even the biggest names in music today. The UK is the second largest music exporter globally, with 10% of all music streams worldwide attributed to British musicians. In 2021, exports of recorded music from the UK hit a record high of £590.8 million, with £41.2 million of this being electronic music. Across recorded music, publishing, and exports, electronic music is worth a total of £181.7 million.

1.2. Live electronic music: concerts, events and festivals

Live electronic music, including concerts, events, and festivals, is a popular form of experiencing electronic music. Electronic music is the most common genre in UK festivals, making up 29% of artists performing, with rock and pop following close behind. Electronic music is the most common genre in UK festivals, making up 29% of artists performing (Rock: 22%, Pop: 21% are second and third). Over 2.4 million people attended UK festivals with electronic music in the last 12 months. The total festival spending was £519.3 million, including drinks, entry fee, transport, and food. Electronic music concerts and events outside of festivals and nightclubs, known as "other live," have an estimated economic contribution of £272.3 million, including entry fee, drinks in the venue, food, transport, and spending in preparation. However, the number of electronic music festivals has declined due to competition and cost increases.

1.3. Electronic music nightclubs

The UK's electronic music nightclubs provide a space for people to come together and experience music in a shared setting. These venues generate significant revenue through tickets, drinks, and other products, and also provide employment opportunities. Nightclubs drive innovation and attract tourists, boosting the local economy. The UK's electronic music scene is diverse and dynamic, but has been severely impacted by the COVID-19 pandemic. Since the start of the pandemic, the number of licensed premises has declined by 11.3%, and the number of nightclubs has declined by 29.3%. Free nightclubs, in particular, have been hit hard, losing 33.0% of their numbers, and this loss is particularly problematic as these venues often provide a safe and inclusive environment for marginalised communities and a platform for underrepresented artists. The loss of these clubs can negatively impact the electronic music culture, limit the opportunity for people to discover new sounds and styles, and limit the availability of safe and welcoming spaces for communities to enjoy music and socialise.

1.4. Electronic music education

The UK is home to a thriving electronic music education industry, teaching the next generation about the history, evolution, and skills of producing and performing electronic music. Not only does it contribute to the economy by creating jobs, but it

also supports cultural diversity and provides new avenues for self-expression. The Lisa Lashes School of Music is a great example, providing education to at-risk children and helping to prevent them from becoming a burden on society. The school's innovative approach has a life-changing impact on students, giving them new confidence, skills, and a supportive community. A student and a parent share their experiences of the positive impact the school has had on their lives.

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

There were over 103 million nights out based on electronic music in the last year. The total economic impact of electronic music on the UK, including recorded music, nightclubs, festivals, and concerts, is estimated at £2.63 billion.

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

2. Communities and Culture. Further benefits of electronic music

Electronic music not only brings financial gains, but also contributes to communities and culture. Nightclubs serve as a platform for local artists, inspiring creativity and artistic innovation. By bringing people from different backgrounds together, nightclubs foster inclusivity and tolerance. They also provide opportunities for community engagement and involvement. These lead to economic benefits as they attract creative talent and support the local arts scene. The impact of electronic music on communities and culture may not be quantified, but it's undeniable.

3. Challenges faced by electronic music, nightclubs and festivals

The UK's electronic music scene faces a number of challenges, from licensing, zoning, and health and safety regulations to rising real estate costs, redevelopment, and gentrification. These difficulties limit the number of electronic music nightclubs and increase their operational costs, affecting the overall experience for patrons. There are significant concerns about the decline of physical spaces for electronic music and its impact on cultural significance. The future of electronic music in the UK will be determined by how these challenges are addressed.

4. Potential solutions for supporting electronic music

While this report doesn't aim to provide comprehensive solutions to the challenges faced by the industry, it offers a starting point for discussions and serves as a call to action for policymakers, stakeholders, and enthusiasts alike. Recommendations for supporting the industry, include the appointment of a nationwide nighttime economy adviser, easing regulatory burdens, providing grants or loans, promoting the UK as a destination for electronic music, encouraging community involvement, investing in electronic music education, and addressing gentrification and redevelopment. The role of the nationwide nighttime economy adviser would be to provide a voice for the hospitality industry, set out a vision for the industry, and advocate for the needs of the industry. These solutions aim to address the challenges faced by the industry and ensure the survival of independent businesses.

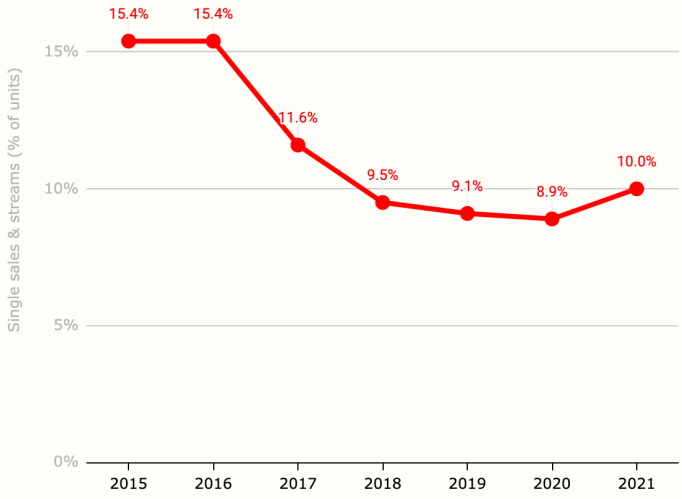
1. The importance of electronic music to the UK economy

This section takes a closer look at the growing impact of electronic music on popular culture through the wider recorded music industry. From the UK dance music scene's rise to the top, to the influence of electronic music on some of the biggest names in music. We delve into the worth of electronic music, both directly and indirectly, and explore how the UK is making waves as a global electronic music exporter.

1.1. Recorded electronic music and music publishing

Electronic recorded music's growing direct impact

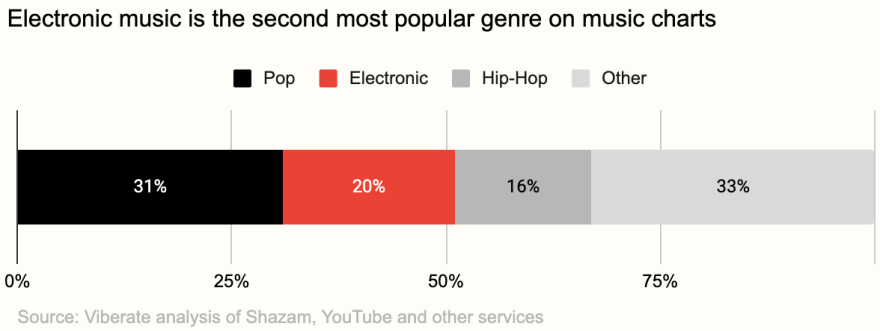
Electronic music, like all musical genres, experiences cyclical patterns of popularity. Dance music's share of single sales and streams declined from 2016 to 2020, but all genres have undergone growth and decline throughout history. Music tastes are always evolving and changing. However, it's clear from the latest numbers that electronic music is now entering its next growth phase in the UK, as people seek out new and innovative forms of music and as the genre continues to evolve and incorporate new influences. With the rise of new technology and platforms for music production and distribution, electronic music will likely continue to grow and evolve in new and exciting ways.



Source: Audience Strategies analysis of BPI data

Electronic music accounts for over a quarter of the Top 10 hits in 2022, according to the BPI. Dance music's share of Top 10 entries has nearly tripled since 2019, overtaking hip-hop/rap and becoming the second most popular genre, behind only pop. With more than half of these dance hits being by or featuring UK artists, the domestic dance music scene is strong and diverse, including breakthrough artists and established stars. This year saw a historical moment where dance tracks

occupied four out of five of the Official Singles Chart's top positions. The increasing popularity of dance music is also reflected in the average beats per minute of the Top 10 tracks, which continues to rise. The rising presence of dance music is being powered by both UK and international talent, including female artists playing a leading role in the genre's popularity. Global superstars such as Beyonce and Drake are also embracing dance music with dance-oriented albums.[2]



Looking more broadly at charts including YouTube, Shazam and beyond, Viberate, a music analytics service, validates the BPI conclusion that electronic music is the second most popular genre after Pop.

Case study: The UK creating new global genres

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

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

- **Breakbeat:** Originated in the UK in the 1980s and is characterised by its use of fast-paced, broken rhythms and funky basslines.
- **Jungle:** A sub-genre of drum and bass that originated in the UK in the early 1990s and is characterised by its use of jungle-themed samples, fast-paced rhythms, and heavy basslines.
- **Drum and Bass:** Originated in the UK in the mid-1990s and is characterised by fast-paced, breakbeat-driven rhythms and heavy basslines.
- **Progressive House:** Originated in the UK in the 1990s and is characterised by lush, musical soundscapes and evolving musical structures.
- **UK Garage:** A subgenre of house music that originated in the UK in the 1990s and is characterised by its soulful vocals, funky basslines, and use of 2-step beats.
- **Dubstep:** Originated in London in the early 2000s and is characterised by its deep, bass-heavy sound and use of complex rhythms and sound design.
- **Grime:** Originated in London in the early 2000s and is characterised by its MC-led vocals, fast-paced beats, and

[2] BPI analsys from https://www.bpi.co.uk/news-analysis/dance-music-s-presence-soars-on-official-singles-chart-providing-more-than-a-quarter-of-2022-s-top-10-hits/

dark, bass-driven instrumentals.

- **Bassline:** A subgenre of UK garage that originated in the UK in the early 2000s and is characterised by its use of fast, bass-driven beats and heavy basslines.
- **Future House:** Originated in the 2010s and is characterised by its use of futuristic synth sounds, heavy basslines, and smooth, groovy beats.
- **Bass House:** Originated in the UK in the 2010s and is known for its heavy basslines, aggressive synth sounds, and fast-paced beats.

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

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

We calculate that electronic music is worth about £79.0m in recorded music and £40.7m in music publishing, totalling £119.7m.[3]

And that's just the direct impact of electronic music. Its indirect impact is even more incredible.

Electronic recorded music's indirect impact

Electronic music has had a significant impact on the music industry beyond just electronic music artists. Even some of the biggest names in music today have paid homage to the pioneers of house music. For instance, Beyoncé and Drake's albums draw on contemporary dance music sub-genres such as Jersey club, Baltimore club, and South African amapiano. Kanye West's LP, Donda 2, also incorporates elements of electronic music in a more subtle manner. Lizzo's hit single "About Damn Time" embodies the sounds of early 2000s French touch house music, while Megan Thee Stallion's "Her" from the album "Traumazine" has a dark and intense feel reminiscent of late 90s garage beats. Furthermore, rumours suggest that Frank Ocean's upcoming album is influenced by house and techno music.[4]

This is backed up by Audience Strategies analysis of the top 100 artists in the world using Chartmetric, which shows that 33% of the most popular artists have 'dance' as one of the genres they produce, but not their primary genre. [5]

[3] Source: Audience Strategies analysis of data from 2021. Recorded music analysis based on combining a selection of data from BPI. Publishing estimates from various sources including https://tarzaneconomics.com/undercurrents/music-copyright-2021
[4] https://www.theguardian.com/music/2022/sep/15/house-music-robin-s-marshall-jefferson-jesse-saunders
[5] Source: Audience Strategies analysis of data from Chartmetric

Export value 🌎

But it's not just the domestic value of UK electronic music that counts. The United Kingdom reigns as the second biggest music exporter globally, trailing only behind the United States. 10% of all music streams worldwide are attributed to British musicians. The BPI revealed that in 2020, UK artists across all genres accounted for one in every ten tracks streamed globally. Furthermore, in 2021, the exports of recorded music across all genres from the UK hit a record high of £590.8 million.[6] We calculate that £41.2m of this is electronic music and that another £21.2m of publishing is earned on top, totalling £62.4m.[7]

Across recorded music, publishing and exports, electronic music itself is worth a total of £181.7m.

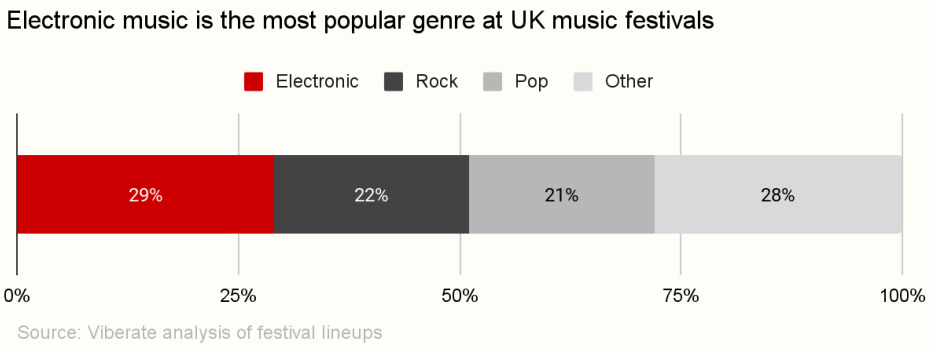
1.2. Live electronic music: concerts, events and festivals

This section of the report explores the live side of electronic music outside of nightclubs, from festivals to concerts and events. Get ready to discover the impact of electronic music bringing people together on the UK economy. From the most popular genre at UK festivals to spending at live events, you'll be dancing to the numbers. So grab your festival gear, and let's dig into the world of live electronic music.

Festivals

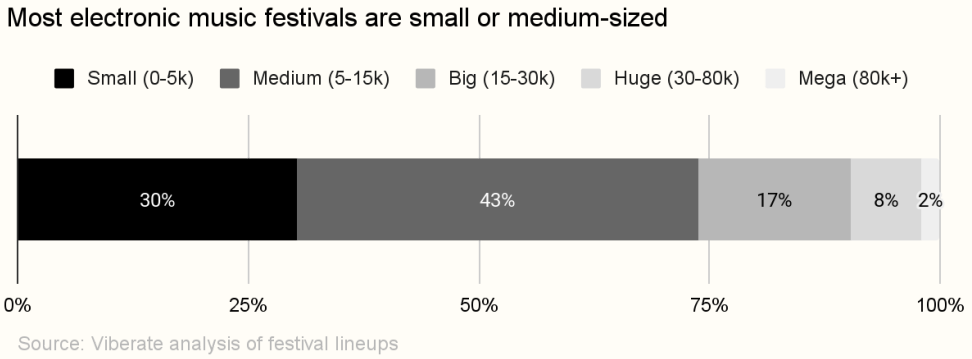
While electronic music has a long history of being associated with nightclubs and dance culture, it is also a popular genre in live concerts and festivals. Live electronic music performances can take many forms, from solo DJs playing sets to full-scale electronic music ensembles with live instrumentation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

Viberate, a music analytics service, calculates that electronic music is the most common genre in UK festivals, making up 29% of artists performing. Rock (22%) and Pop (21%) are second and third, respectively.



[6] https://www.ukmusic.org/news/trading-up-how-the-music-industry-can-boost-uk-exports
[7] Source: Audience Strategies analysis of data from BPI, IFPI and estimates from leading industry economists.

Most electronic music festivals are small (0-5k attendees) or medium-sized (5-15k). 74% of all festivals with electronic music are under 30k attendees.



Across the 145 festivals Viberate identified as including electronic music, we calculate that 2.4m people attended UK festivals with electronic music on the bill in the last 12 months. 67% of these led with electronic music and were classified as 'primarily electronic' festivals.

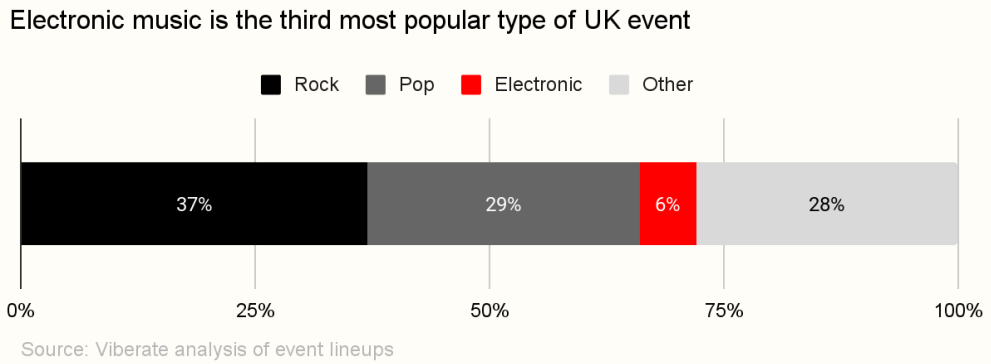
We calculated the measurable economic impact of UK festivals that include electronic music, and the results are truly staggering. With a total of £519.3m, festivals that feature electronic music are making a significant contribution to the UK economy. The spending breakdown includes £31.7m in preparation costs, £90.8m on drinks, £248.0m on entry fees, £74.4m on transport, and £74.4m on food. These figures demonstrate the significant impact that festivals featuring electronic music have on the economy and highlight the importance of supporting and promoting this vibrant and thriving cultural sector. Whether it's through spending on preparation, drinks, entry fees, transport, or food, electronic music festivals are having a measurable and positive impact on the UK economy.[8]

Spending in prep	£31.7m
Drinks	£90.8m
Entry fee	£248.0m
Transport	£74.4m
Food	£74.4m
Total	**£519.3m**

It is worth noting that significantly fewer electronic music festivals took place in 2022 than in previous years. Viberate counted 145 UK festivals that included electronic music in 2022, but 259 festivals have run previously and included electronic music. The decline is mainly due to festivals not running in 2022 due to factors like competition and cost increases. It is a tough environment out there.

[8] Source: Audience Strategies analysis of data from Viberate along with estimates of spending from surveys, including REKOM's tracker and estimates from leading industry economists.

Other live electronic music



Source: Viberate analysis of event lineups

In addition to the impact of festivals and nightclubs, our study also considers the economic contribution of other live electronic music concerts and events, thanks to Chris Carey at LIVE (Live music Industry Venues & Entertainment). The results of this analysis show that "other live" events are making a significant impact on the economy, with a total of £272.3m. This includes £18.0m in daytime spending on preparation, £17.0m on transport, £42.1m on food, and £34.1m on predrinks. Furthermore, the direct impact of "other live" events includes £51.5m on drinks in the venue and £109.6m on entry fees. These estimates highlight the significant impact that electronic music concerts and events are having on the economy beyond just festivals and nightclubs. By taking into account both the indirect and direct impact of "other live" events, we can paint a more complete picture of the economic power of electronic music in the UK.[9]

Other live indirect	
Daytime spending in prep	£18.0m
Transport	£17.0m
Food	£42.1m
Predrinks	£34.1m
Other live direct	
Drinks in the venue	£51.5m
Entry fee	£109.6m
Other live total	**£272.3m**

[9] Source: Chris Carey at LIVE (Live music Industry Venues & Entertainment), based on ticket sales, market share, and assumptions of other spend around events and LIVE's own data

1.3. Electronic music nightclubs

This section takes you on a journey into the heart of nightclubs, the iconic destinations that have been the cornerstone of the electronic music genre for decades. From the immersive experiences to the economic impact, we delve into the world of nightclubs and uncover the secrets of their success. Find out how these venues create a symphony of sound, light and happiness. How they generate millions in revenue and provide jobs for thousands. How they drive innovation, boost tourism and provide a safe haven for marginalised communities.

Nightclubs 💰 generating revenue

Nightclubs have historically been a central hub for the electronic music scene, providing a space for people to come together and experience music in a shared setting. Nightclubs have often been known for their cutting-edge sound systems, lighting, and visuals, creating an immersive experience for patrons. In many cities, nightclubs have become iconic destinations for electronic music fans, hosting some of the world's most famous DJs and electronic music artists. In addition to live performances, nightclubs also often feature multiple rooms with different music genres and styles, allowing patrons to experience a variety of sounds and styles throughout the night. Through the years, nightclubs have continued to evolve and adapt to changing technology, providing a vital platform for the electronic music genre to grow and thrive.

The total spend created by a night out in an electronic music nightclub was calculated by adding up the following expenses[10]:

- Daytime spending (e.g. grooming, clothing)
- Drinks purchased at the venue
- Entry fee for the club
- Transportation costs to and from the venue
- Food expenses
- Predrink expenses (drinks consumed before arriving at the club).

We calculate that the total spending caused by nights out in electronic music nightclubs in 2022 is a staggering £1,657.4m. This figure is obtained by adding up both indirect and direct spending. The indirect spending includes £201.4m in daytime spending on preparation, £191.2m on transport, £157.0m on food, and £382.3m on predrinks. The direct spending, on the other hand, includes £576.9m on drinks in the venue and £148.5m on entry fees. This extensive calculation demonstrates the significant impact that electronic music nightclubs are having on the UK economy, showcasing their value as a cultural and economic force. Whether through indirect spending on preparation, transport, food, and predrinks, or direct spending on drinks in the venue and entry fees, electronic music nightclubs are making a significant impact on the economy and should be celebrated for their contributions.[11]

[10] REKOM's UK NIGHT INDEX was invaluable for this. We used data from October 2022 available at https://rekom.uk/late-night-index/

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

Nightclubs indirect	
Daytime spending in prep	£201.4m
Transport	£191.2m
Food	£157.0m
Predrinks	£382.3m
Nightclubs direct	
Drinks in the venue	£576.9m
Entry fee	£148.5m
Nightclubs total	**£1,657.4m**

The report categorises nightclubs based on their management structure, location, and location within a country. The three management structures include managed nightclubs, leased nightclubs, and free nightclubs. The total calculated spend for managed nightclubs is £367.3m, for leased nightclubs it is £58.5m, and for free nightclubs it is £1,185.9m. The location categories include city nightclubs, town nightclubs, and small town/rural nightclubs, with the total calculated spend for city nightclubs being £1,363.1m, for town nightclubs it is £168.1m, and for small town/rural nightclubs it is £80.4m. Finally, the report categorises nightclubs based on their location within a country, including England, Scotland, and Wales, with the total calculated spend for England being £838.7m, for Scotland it is £550.0m, and for Wales it is £222.9m. These categories provide a comprehensive understanding of the different types of nightclubs and their unique economic impact.[12]

Managed	£367.3m
Leased	£58.5m
Free	£1,185.9m
City	£1,363.1m
Town	£168.1m
Small Town/Rural	£80.4m
England	£838.7m
Scotland	£550.0m
Wales	£222.9m

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

Nightclubs 🔊 equipment

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

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

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

Nightclubs ⛓ supply chains

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

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

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

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

Nightclubs 💼 creating jobs

Nightclubs provide a wide range of employment opportunities for people in various roles. In addition to performers such as DJs and live electronic music artists, nightclubs also require staff to support the venue's operations. Bartenders are responsible for serving drinks, while security staff ensure the safety of patrons. Lighting and sound technicians are essential to creating the immersive experience synonymous with nightclubs, ensuring that the music and lights are carefully synchronised to enhance the overall atmosphere. Other nightclub roles include door personnel, servers, cleaners, and management. These employment opportunities can offer stable and rewarding careers for individuals in the hospitality and entertainment industries. Whether behind the bar or on the dancefloor, nightclubs offer a vibrant and dynamic working environment that can provide meaningful employment for people from various backgrounds and skill sets.

There are about 9m nighttime workers total.[13] The total number of nighttime workers associated with cultural and leisure activities is 2.1m. This figure comprises two sub-categories: nighttime culture and leisure activities, which make up 874,400 workers, and activities which support nighttime cultural and leisure activities, which account for 1.2m workers. These workers contribute to the night-time economy, helping to provide various services, experiences, and entertainment options for people engaging in cultural and leisure activities during the night.

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

Our calculations conclude that 60,337 jobs are nightclub-related.[14]

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

Nightclubs 🏨 boosting tourism

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

According to a UK Music report from November 2019, 11.2 million individuals travelled domestically and internationally for music events in 2018, making up over a third of the total number of tickets sold in the country that year. London was the most popular destination, attracting 2.8 million people with its music offerings. Northwest England was also a popular choice. Scotland saw the largest year-over-year increase, drawing in 1.1 million visitors. [15]

Music tourism is a booming industry, with a staggering £4.5 billion in spending generated in 2018 alone. With 11.2 million music tourists flocking to the UK in 2018, it's clear that people are passionate about experiencing live music. Of these tourists, 888,000 were from overseas, while 10.3 million were from within the country. Not only does music tourism bring joy and excitement to those who attend events, but it also supports a significant number of full-time jobs - a total of 45,530 in 2018. To top it all off, the average spend by overseas music tourists was a generous £851 in 2018, making music tourism a crucial player in the UK's economy.[16]

"... WPP's Best Countries Research shows 79.5 percent of people agree that brands play an important role in defining a country's culture. In the UK, our nightlife brands are crucial in strengthening 'brand' UK …"
- Charlie Toller, Prism Sport + Entertainment, an agency that specialises in engaging sport and entertainment audiences

[13] "The night-time economy, UK: 2022" from ONS at https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/articles/thenighttimeeconomyuk/2022#overview-of-the-night-time-workforce
[14] Source: Audience Strategies analysis of data from "The night-time economy, UK: 2022" from ONS plus data from CGA & AlixPartners Hospitality Market Monitor. Combined with updated estimates from leaders in the industry and leading industry economists.
[15] https://djmag.com/longreads/what-future-techno-tourism
[16] https://www.ukmusic.org/research-reports/this-is-music-2022/

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

Nightclubs 💡 driving innovation

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

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

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

Nightclubs 📊 total statistics

We calculate that there were 1.8m nights out in nightclubs in 2022 and 96.2m nights out over the year.[17]

There are 882 clubs in GB (i.e. UK excl. Northern Ireland). A diverse range of electronic music nightclubs, ranging from small, local, and independently-run venues with a capacity of 250 people or less to global superclubs like Fabric and Ministry of Sound that can hold thousands of patrons. These venues offer a variety of electronic music genres and experiences, from intimate and underground settings to large-scale and high-energy events. The range of options available allows for a diverse and dynamic electronic music scene in the UK, catering to different tastes and preferences. [18]

But we're losing them. Fast. As GB data from CGA & AlixPartners Hospitality Market Monitor (December 2022) shows. [19]

	Number of venues										
By Tenure	**Tenure**	**Mar-20**	**Dec-21**	**Sep-22**	**Dec-22**	**Dec 22 vs Sep 22**		**Dec 22 vs Dec 21**		**Dec 22 vs Mar 20**	
Total GB licensend	**Total**	**115,108**	**106,880**	**103,682**	**102,071**	-1.6%	- 1,611	-4.5%	- 4,809	-11.3%	- 13,037
Licensed Late-Night	**Total**	**14,106**	**13,473**	**13,304**	**13,145**	-1.2%	- 159	-2.4%	- 328	-6.8%	- 961
Licensed Late-Night	Managed	3,351	3,262	3,304	3,289	-0.5%	- 15	0.8%	27	-1.9%	- 62
Licensed Late-Night	Leased	523	465	448	449	0.2%	1	-3.4%	- 16	-14.1%	- 74
Licensed Late-Night	Free	10,232	9,746	9,552	9,407	-1.5%	- 145	-3.5%	- 339	-8.1%	- 825
Nightclub	**Total**	**1,247**	**1,035**	**938**	**882**	-6.0%	- 56	-14.8%	- 153	-29.3%	- 365
Nightclub	Managed	238	214	207	201	-2.9%	- 6	-6.1%	- 13	-15.5%	- 37
Nightclub	Leased	40	36	32	32	0.0%	-	-11.1%	- 4	-20.0%	- 8
Nightclub	Free	969	785	699	649	-7.2%	- 50	-17.3%	- 136	-33.0%	- 320
By Nation	**Tenure**	**Mar-20**	**Dec-21**	**Sep-22**	**Dec-22**	**Dec 22 vs Sep 22**	**Dec 22 vs Sep 22**	**Dec 22 vs Dec 21**	**Dec 22 vs Dec 21**	**Dec 22 vs Mar 20**	**Dec 22 vs Mar 20**
Licensed Late-Night	**Total**	**14,106**	**13,473**	**13,304**	**13,145**	-1.2%	- 159	-2.4%	- 328	-6.8%	- 961
Licensed Late-Night	England	12,241	11,694	11,563	11,423	-1.2%	- 140	-2.3%	- 271	-6.7%	- 818
Licensed Late-Night	Scotland	1,234	1,190	1,164	1,152	-1.0%	- 12	-3.2%	- 38	-6.6%	- 82
Licensed Late-Night	Wales	630	588	569	562	-1.2%	- 7	-4.4%	- 26	-10.8%	- 68
Nightclub	**Total**	**1,247**	**1,035**	**938**	**882**	-6.0%	- 56	-14.8%	- 153	-29.3%	- 365
Nightclub	England	1,054	872	797	746	-6.4%	- 51	-14.4%	- 126	-29.2%	- 308
Nightclub	Scotland	125	109	94	92	-2.1%	- 2	-15.6%	- 17	-26.4%	- 33
Nightclub	Wales	67	54	47	44	-6.4%	- 3	-18.5%	- 10	-34.3%	- 23
By Area	**Tenure**	**Mar-20**	**Dec-21**	**Sep-22**	**Dec-22**	**Dec 22 vs Sep 22**	**Dec 22 vs Sep 22**	**Dec 22 vs Dec 21**	**Dec 22 vs Dec 21**	**Dec 22 vs Mar 20**	**Dec 22 vs Mar 20**
Late Night	City	6,982	6,631	6,518	6,468	-0.8%	- 50	-2.5%	- 163	-7.4%	- 514
Late Night	Town	4,424	4,216	4,153	4,078	-1.8%	- 75	-3.3%	- 138	-7.8%	- 346
Late Night	Small Town/Rural	2,700	2,626	2,633	2,599	-1.3%	- 34	-1.0%	- 27	-3.7%	- 101
Nightclub	City	617	531	486	459	-5.6%	- 27	-13.6%	- 72	-25.6%	- 158
Nightclub	Town	445	360	323	301	-6.8%	- 22	-16.4%	- 59	-32.4%	- 144
Nightclub	Small Town/Rural	185	144	129	122	-5.4%	- 7	-15.3%	- 22	-34.1%	- 63

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

[18] Source for the data: CGA & AlixPartners Hospitality Market Monitor.

[19] This data shows the 'net decline' in sites in the sector, thus including both openings and closures. All data here is GB (so it does not include Northern Ireland) Source: CGA & AlixPartners Hospitality Market Monitor (December 2022 data). Licensed market = Venues that sell alcohol on site, such as pubs, bars, restaurants and clubs. Late-Night = Aggregate of 'Nightclubs', 'Bars', 'Bar Restaurants' and 'Large Venues'. Nightclub = Late-night venue, closing after midnight. Music and entertainment are the primary focus for visit. Bars = Typical late-night bars such as Late Night Bars, Cocktail Bars, Wine Bars, Craft Bars etc. Bar Restaurants = Offers both food and high quality drinks. Often transitions from dining in the evening to a 'bar' feeling in the night. Large Venue = Arenas, Theatres, Bingo Halls, Licensed cinemas, Ballroom, Licensed sports arenas.

Source:

1. **We lost a LOT of nightclubs since the pandemic**

   Since the pandemic's start (March 2020), Great Britain (so, UK excl. Northern Ireland) has seen a net decline of -13,037 licensed premises (-11.3%). In the same period, the licensed Late-Night market saw a net decline of -961 sites (-6.8%), meaning that again the Late-Night market overperformed the wider licensed market. But Nightclubs fared notably worse than both the wider market and the wider licensed Late-Night market, losing -365 sites (-29.3%) since COVID emerged.

2. **We're still losing nightclubs. Fast.**

   In Q4 of 2022 the number of licensed premises in Great Britain[20] declined by -1,611 sites (-1.6%).[21] In the same period, the Late-Night market saw a net decline of -159 sites (-1.2%), meaning it did better than the wider licensed market in this time. Nightclubs, however, again fared notably worse than both the wider licensed market and the wider licensed Late-Night market, losing -56 sites (-6.0%) in just three months.

3. **We're losing the heart of club culture. Risking the rest of the body.**

   Free[22] nightclubs, in particular, play an important role in the electronic music culture as they tend to be more underground and alternative than Leased or Managed ones, featuring more niche and experimental music and DJs. They may attract a more dedicated and passionate crowd of music enthusiasts and are often considered the heart of the electronic music scene, where new and emerging artists can showcase their talents and build a fanbase.

   According to data from March 2020 to December 2022, the number of managed nightclubs in GB decreased by 15.5%, leased nightclubs decreased by 20.0%, and free nightclubs decreased by 33.0%.

   This drastic loss of 320 Free clubs from the 969 we had pre-pandemic is particularly problematic as there are fewer opportunities for new and emerging artists to showcase their talents and build a fanbase, which can negatively impact the electronic music culture and its development. Moreover, the loss of underground clubs means fewer opportunities for music enthusiasts to discover and experience new sounds and styles.

   It will also have a significant impact on the communities that feel uniquely welcome in these spaces. Underground clubs often provide a safe and inclusive environment for marginalised communities, such as the LGBTQ+ community, people of colour, and other minority groups. These clubs may be one of the few spaces where these groups feel free to express themselves and enjoy music without fear of discrimination or harassment. Without these clubs, it can be more difficult for these communities to find a safe and welcoming space to enjoy music and socialise. Additionally, the loss of underground clubs can also mean a loss of diversity in the electronic music scene, as these clubs often provide a platform for underrepresented artists and communities to showcase their talents and connect with audiences. The loss of underground clubs can not only affect the communities that feel welcome in these spaces, but it also limits the opportunity for people to discover new sounds and styles and to be exposed to new perspectives and experiences.

[20] Great Britain refers to the island that consists of England, Scotland, and Wales, but excludes Northern Ireland which is considered part of the United Kingdom.
[21] This is a net decline and so it takes into account openings and closings. Data from CGA & AlixPartners Hospitality Market Monitor
[22] The nightclub industry in the UK can be classified into three categories: managed, leased, and free. Managed nightclubs are owned and operated by a single company or individual, leased nightclubs are operated by an individual or company who rents the space from the owner, and free nightclubs are not owned or operated by any single individual or company, but rather, multiple promoters or event organisers use the space for their own events.

	Sites at December 2021	Sites at September 2022	Sites at December 2022	% change Dec. 2022 v Sept. 2022	% change Dec. 2022 v Dec. 2021
Sports / social club	21,343	20,552	20,377	-0.85%	-4.53%
Community pub	19,126	18,538	18,382	-0.84%	-3.89%
Restaurant	16,878	16,016	15,630	-2.41%	-7.39%
Food pub	12,115	11,877	11,813	-0.54%	-2.49%
Hotel	7,525	7,379	7,328	-0.69%	-2.62%
High street pub	6,265	6,122	6,072	-0.82%	-3.08%
Casual restaurant	5,477	5,292	5,185	-2.02%	-5.33%
Large venue	4,559	4,548	4,525	-0.51%	-0.75%
Bar	4,507	4,487	4,455	-0.71%	-1.15%
Bar restaurant	3,372	3,331	3,283	-1.44%	-2.64%
Nightclub	1,035	938	882	-5.97%	-14.78%
Total	**106,880**	**103,682**	**102,071**	**-1.55%**	**-4.50%**

Data from GB (i.e. UK excl. Northern Ireland). Source: CGA [23]

Industry perspectives:

"... On the one hand, dance music is in quite rude health - last year was a very good year for chart positions, and festivals are doing okay. But It's the smaller specialist venues that can't afford to stay in business. Not necessarily because demand is down but because the expenses are so much greater than they were. And the genesis of most careers (mine included) is in little places …"
- Jules O'Riordan (AKA Judge Jules), Sound Advice

"... It's worse than I've ever known. When I was starting up, there used to be a big club in every town, and now there's not. It's a really bad situation. Without those clubs in every town and city, I probably wouldn't have started DJing and doing the career that I'm doing now because the first step onto the ladder of DJing and having a career was to become a resident of a club and learn how to read a crowd and how to actually be a DJ. I worry for people who do have ambitions and dreams of being a DJ without having those clubs. To go from bedroom straight to a festival or The Warehouse Project or Printworks is pretty unattainable. Where are the venues for the selectors and the DJs that want to get on the ladder at a local level? …"
- Danny Howard, DJ, producer, and radio host, BBC Radio 1

[23] https://info.cgastrategy.com/hubfs/Hospitality%20Market%20Monitor/2023/CGA%20Alix%20Partners%20-%20Hospitality%20Market%20Monitor%20January_.pdf

"... Nightclubs are really important for electronic music of all styles. These are the places where people go out and learn their craft and learn their skills to be able to take it to the big stage. And a problem we have at the moment is you get an artist that gets a million streams on Spotify or TikTok and gets booked to perform at a festival, but because they have no experience of performing at nightclubs and no experience of controlling crowds, they are not giving the audience the best experience possible. This has a knock-on effect because somebody will pay £100 to go to a festival, leave underwhelmed and then decide not to go again. So it has a much wider and longer-term effect than any of us realise …"

- DJ Phantasy, DJ and producer of drum and bass music

"... Electronic music has long made an essential contribution to our vibrant UK music culture, but while millions enjoy it, its importance to our towns and cities and the mutual relationship that exists, has sometimes been undervalued. Dance music gets audiences into clubs and bars, with all the spill-over benefits this has for the many businesses that rely on and cater to the night-time economy. DJs and artists develop their craft and fanbases in these often small but vital venues, but with the existential pressures many now face, we are sadly seeing an increasing number close down, threatening a whole ecosystem at the very moment we are also witnessing a resurgence in British dance music and lots of really exciting and diverse talent come through …"

- Sophie Jones, BPI Chief Strategy Officer and Interim CEO

"... In 2022 we delivered over 2,000 brand partnerships in 56 cities across the UK across festivals, arenas, live music venues and nightclubs. Over 95% of these were focused on electronic music. We know what electronic music spaces represent and how important they are to people's lives. The scores of street teams, bar staff, doorman and any number of people employed in the industry are advocates for this culture and depend on the scene as much as the artists and fans that share it. …"

- Charlie Toller, Prism Sport + Entertainment, an agency that specialises in engaging sport and entertainment audiences

Case study: Bristol

As we've shown in this report, the electronic music scene in the UK has been in trouble for years, with many nightclubs closing down due to financial struggles. However, Bristol is bucking this trend and has become a beacon of hope for other cities in the country.

Bristol stands out as a city where the nightclub scene is stable, despite the troubles faced by the industry in other parts of the country. Carly Heath, the Night Time Economy Advisor for Bristol, attributes this success to a thriving local scene that is not solely reliant on visitors. Bristol also has a large student population, which helps to support the ecosystem. Additionally, the city doesn't have a zoned area for nightlife, making it accessible to different communities in different parts of the city rather than concentrating it in one particular area.

Bristol has always been a hub for culture, music and nightlife, and in recent years, it has seen a slight growth in the electronic music scene despite national trends. Whilst the most recent data has shown a significant loss of nightclubs across the UK, Bristol has offset losses with new clubs that opened since the pandemic.

What sets Bristol apart from other cities?

Community-building: Instead of simply providing a place to dance and drink, Bristol's nightclubs are a hub for creative expression and community building. They offer a safe and inclusive space where people can come together to enjoy music, art, and culture.

Technological innovation: Innovative clubs like Lost Horizon HQ. Imagine a venue where you can experience live music, art, and a bar, all in one place. That's exactly what the team behind Glastonbury's Shangri-La has created with Lost Horizon HQ, an independent arts centre pushing the boundaries of what's possible in the world of nightlife as the world's first fully hybrid venue. With an exact digital twin, it's capable of replicating live performances into virtual reality in real-time. So, whether you're in the mood for an IRL experience or a virtual one, Lost Horizon has got you covered. And, for those who want a taste of both, the venue even has a mini VR hub on site.

Small Venues: Incubators of Artistic Experimentation and Innovation. Bristol has lots of small venues with capacities of 200-350 which play a crucial role in the development of new sounds and scenes. These intimate spaces provide the perfect environment for experimentation, allowing promoters and artists to take risks and explore new ideas in a supportive and encouraging atmosphere. These venues also serve as incubators for new artists, providing a platform for up-and-coming DJs to hone their skills and build their following. With a smaller capacity, it's easier for these venues to break even, meaning they can take a chance on new and untested talent. This creates a virtuous cycle, where the venue supports the artist, the artist attracts a crowd, and the venue can continue to thrive and bring in new talent. Furthermore, these smaller venues provide the perfect environment for the incubation of new sounds and scenes, providing the space and support needed for artists to push the boundaries and create something truly innovative.

"... Having a strong local scene is key to fostering the next generation of artists. Bristol is a city that continually reinvents its sound, and draws from a local talent pool to nurture emerging artists. Massive Attack, Eats Everything, Idles, Joker, Eva Lazarus, Khan, Addison Groove, are all products of a supportive local creative community which makes space for new artists to develop their sound. This is only possible with a tight-knit and thriving local scene …"
- Carly Heath, Night Time Economy Advisor for Bristol

Bristol's approach to nightclubs contains many lessons in how to revive the electronic music scene in the UK. Bristol has created a thriving nightlife scene that is attracting visitors from all over the country. Other cities can hopefully learn from Bristol's success.

1.4. Electronic music education 👩‍🎓

Electronic music education is a thriving industry in the UK, taught in a variety of settings, including schools, colleges, and professional education programs. By providing young people with the opportunity to learn about electronic music, its history and evolution, as well as the skills necessary to produce and perform it, electronic music education is an important way to engage and inspire the next generation of musicians and music lovers.

Electronic music education has numerous benefits to the UK, both economically and culturally. On an economic level, electronic music education creates jobs for music teachers, technicians, and other professionals, contributing to the overall health of the UK economy. Furthermore, by providing young people with the skills necessary to pursue careers in the music industry, electronic music education helps to support the growth and success of this important economic sector.

Beyond the economic benefits, electronic music education also has significant cultural and community benefits. By bringing together people from diverse backgrounds and promoting inclusivity and tolerance, electronic music education supports cultural diversity in the UK. Additionally, by providing a platform for local musicians and artists to showcase their work, electronic music education supports the development of new music and art forms, enriching the cultural fabric of the UK.

A great example here is The Lisa Lashes School of Music, which provides electronic music education targeted at children at risk of exclusion, and has a positive impact on young people by inspiring them to explore their creativity and build lucrative careers. By providing access to music education, the school helps young people develop valuable skills and find new avenues for self-expression. This benefits not only the young people themselves but also society as a whole, as it can help prevent them from being a burden on the taxpayer. By providing a supportive environment for young people to learn and grow, the Lisa Lashes School of Music is making a significant contribution to the future of the music industry and the well-being of young people. The school's innovative approach to music education is helping to create a brighter future for young people who might otherwise face significant challenges and obstacles. Thanks to electronic music.

> *"... The past 12 weeks have been nothing short of life-changing. When I first walked in, I was at a low point, down on confidence, self-belief, and motivation for pretty much anything … I learned exactly what is needed to make it in the music industry, covering every aspect, including how to organise, promote, and run an event. The most important thing the course has given me is a circle of friends for life, who all share a common love of music …"*
> - Student, The Lisa Lashes School of Music

> *"... N.B. has changed so much since he came on the course. Giving him praise and introducing him to something he was good at has not only changed his life but, everyone in the family too. He now has a vision, a reason, and a goal which I thank everyone of the tutors and staff at LLSOM who took the time to spend with my son. He is a completely different young man now with huge dreams which he will be successful in. Thank you"*
> - Parent, The Lisa Lashes School of Music

Investment in creative arts, including electronic music, can lead to a happier, healthier, and more fulfilled society:

> *"... The government needs to step up and create spaces for people to be able to go and be creative. Not everybody wants to be a plumber or electrician or do standard jobs. Some people want to go into the creative arts. look at all the people making money off of things like YouTube and TikTok, and social media - it's clear that creativity is becoming increasingly important in our world. By investing in electronic music and providing spaces for people to express themselves and unleash their creativity, society would be happier, healthier and more fulfilled …"*
> - DJ Phantasy, DJ and producer of drum and bass music

Without a thriving night time economy, there is no room for job opportunities in electronic music and education and training are meaningless. It is crucial for young people who don't fit into the traditional job market to have job opportunities.

"... There are so many different kinds of jobs that you can have in and around electronic music. as well, You could be in marketing, putting playlists together or making music, DJs, radio presenters, and that's what we teach at the school. If there's no night time economy, there is no school or education. What's the point of universities teaching people to be creative, when there's nowhere for them to work? it's so important for us to have and create jobs for the youngsters who don't quite fit into the ordinary standard life …"

- Lisa Rose-Wyatt (AKA Lisa Lashes), International DJ & Producer, Founder of the Lisa Lashes School of Music

Case study: Point Blank Music School

Alongside small and socially impactful education programs like the Lisa Lashes School of Music, giant organisations are educating vast numbers of young people. Point Blank Music School is a leading music school that has trained over 50,000 students and produced many successful graduates in the music industry, including Felix Jaehn and Leona Lewis. The school offers a range of courses in music and sound engineering and provides students with state-of-the-art facilities, opportunities to connect with industry professionals, and a supportive learning environment. Students and alumni praise the school for its practical approach to music education and its ability to prepare students for careers in the music industry. Point Blank is more than just a music school, it is a network of talented individuals and a thriving hub of creativity and innovation in the music world. We spoke to Rob Cowan, CEO & Founder of Point Blank Music School to learn more.



Point Blank Music School's esteemed network of graduates scatters the globe, contributing to the thriving creative arts, performing at top festivals, creating chart-topping hits, and commanding legions of fans. From internationally touring DJ producers such as Patrick Topping, Nicole Moudaber, Felix Jaehn, IMOGEN, and Jaden Thompson to singer-songwriters like Aluna Francis and Leona Lewis.

We have trained over 50,000 students since the school opened its doors, but if we were to take a deeper look into the careers of our students, you'd see the impact that our school has contributed to UK culture, local communities, and commerce.

Felix Jaehn: Felix completed our Music Industry & Sound Engineering course in 2013. The following year, he released his global multi-platinum hit "Cheerleader" and began headlining festivals such as Tomorrowland and Ultra Music Festival. Since then, he's solidified his standing as a top electronic music artist, released 2 studio albums, and as of 2023, totalled over 3 billion streams on Spotify.

Our current students also praise us as we guide their journeys through the music industry. Some quotes from our students across all disciplines:

"... There are events, opportunities…It's a living thriving network of people at your fingertips"

"... The facilities are insane… State-of-the-art equipment"

"... The teachers, the lecturers, the door is always open. You can come in whenever you want... It's a really relaxed and nurturing environment"

"... Through Point Blank, I've gone over to Ibiza to host a masterclass the opportunities that Point Blank gives you, it's priceless you won't get that at any other university"

"... Point Blank is more than a university, you come here and you enter the industry. You're in a very unique position where you are a full-time musician for three years and that's so special"

CEO & Founder Rob Cowan's ongoing passion to solidify music in young people's lives is summed up here: "From young people making beats in their bedrooms to clubbers at events all over the UK, to students at music schools such as Point Blank, electronic music is a massive part of the UK's cultural life and economy. It's been part of my life since the early years of acid house parties and my first trip to Ibiza in 1987. I wouldn't be the person I am without it. Long live electronic music!

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

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

In total, across nightclubs, festivals and concerts, we estimate that there were 103m 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).[24]

Number of nights out	
Festivals	2.5m
Nightclubs	96.2m
Other live	4.4m
Total	**103.0m**

Adding it all up, the measurable impact of electronic music on the UK across recorded music, nightclubs, festivals and concerts is £2.6b.[25]

Recorded music in the UK	£78.7m
Music publishing in the UK	£40.5m
UK artists recorded music abroad	£41.2m
UK artists music publishing abroad	£21.2m
Recorded music total	**£181.7m**
Nightclubs indirect	
Daytime spending in prep	£201.4m
Transport	£191.2m
Food	£157.0m
Predrinks	£382.3m
Nightclubs direct	
Drinks in the venue	£576.9m
Entry fee	£148.5m
Nightclubs total	**£1,657.4m**

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

Spending in prep	£31.7m
Drinks	£90.8m
Entry fee	£248.0m
Transport	£74.4m
Food	£74.4m
Festivals total	**£519.3m**
Other live indirect	
Daytime spending in prep	£18.0m
Transport	£17.0m
Food	£42.1m
Predrinks	£34.1m
Other live direct	
Drinks in the venue	£51.5m
Entry fee	£109.6m
Other live total	**£272.3m**
Total economic impact	**£2,630.7m** (That's £2.6b)

As exciting as this is, we'll end the economic evaluation with a gentle reminder that this is an ecosystem fueled by grassroots culture. And that, over the long term, the economic benefits of big clubs, festivals, recorded music and music export can't be grown or even sustained if we don't invest to stop the tragic mass closure of grassroots venues. "The relationship between electronic music and gigs is symbiotic," says Jules O'Riordan (AKA Judge Jules), a long-time veteran of electronic music who has seen the industry from every angle - promoter, artist, DJ, radio presenter and now a partner at Sound Advice, a London based law firm specialising in media and entertainment law.

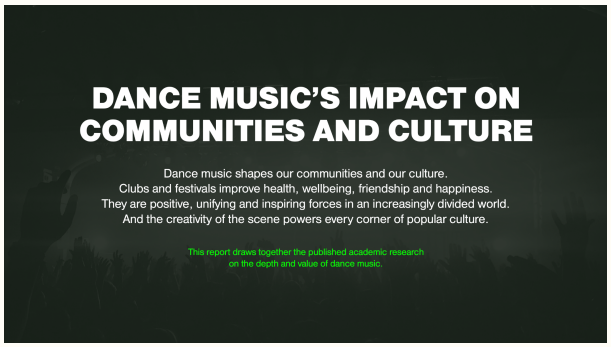
"... There are tens of thousands of new dance music releases every day. So it's a very difficult market for an artist to stick their head above the parapet. If they don't have those small shows, at which they can build up the nucleus of a fan base, - which is basically the way all genres of musicians have built a career, myself included - then it's really tough for new artists to break through …"
- Jules O'Riordan (AKA Judge Jules), Sound Advice

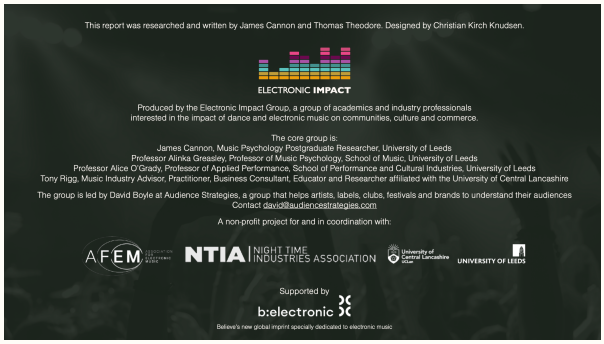
2. Communities and Culture. Further benefits of electronic music

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

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

"... I think the word nightclub has just got such a stigma to it from back in the day when people used to go to a nightclub, get drunk, come outside and have a fight. Things have moved on SO MUCH since then! …"
- DJ Phantasy, DJ and producer of drum and bass music





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

The report covers the following topics:

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

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

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

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

Industry perspectives:

We've shown that electronic music has a powerful impact on people and can play a positive role in improving their well-being and emotional state, but there is a disconnect between the perception of electronic music by those in government and its actual positive effects. Greater understanding and recognition of the positive impact of electronic music and nightclubs is needed:

"... Many people don't realise the impact electronic music can have on people. I remember one time in the Coventry Eclipse, I was in the crowd, waiting to go on the decks. I looked to my right to see a girl crying. I said to her, 'are you okay?' She said, 'yeah, I'm just so happy. This is amazing.' Recently another young person was telling me that she was in a really bad place, but the music we make has brought her out of it - it's a beautiful thing to be able to have that impact on someone, to make them feel better about themselves - to help somebody come out the other end and see that everything will be alright. It's a shame that people in government don't see this. I believe if our government listened to the positive impact that nightclubs and our scene have on people's lives, I think that they would have a different outlook …"

- DJ Phantasy, DJ and producer of drum and bass music

Nightclubs play a crucial role in building and supporting communities, particularly in smaller towns and cities where there may be limited opportunities for arts and cultural engagement. We need to protect nightclubs and recognize their significance in community building:

"... Nightclubs provide an incredibly important physical space for building communities. This is even more significant in smaller towns and cities where there's a huge disparity in opportunities and investment into the arts and culture compared to somewhere like London. I've witnessed first-hand how nightclubs have offered sanctuary for marginalised groups, borne lifelong friendships and created opportunities for chance encounters and life-changing moments—the remnants of which have been felt for years after. Nightclubs are the epicentre of creativity, innovation and community building and must be protected at all costs …"

- Amy Van-Baaren, Head of Community, Resident Advisor

3. Challenges faced by electronic music nightclubs and festivals

The electronic music nightclub industry in the UK faces several regulatory hurdles that can make it difficult for venues and festivals to operate successfully. This section of the report will briefly examine some of the key challenges faced by electronic music nightclubs and festivals, including licensing, zoning, health and safety regulations, noise restrictions, and real estate issues. These challenges can limit the number of electronic music nightclubs in certain areas, increase the operational costs of these venues, and limit the overall experience for patrons.

In addition to these regulatory hurdles, the decline of physical spaces for electronic music raises important questions about the future of this genre. The concern is that the decline of physical spaces for electronic music may undermine the growth of cultural resonance, as people are less likely to experience the music in a live setting. This section of the report will explore these issues and their implications for the future of electronic music in the UK.

Regulatory Hurdles

- **Licensing:** Obtaining a licence to operate an electronic music nightclub can be a complex and time-consuming process, often involving multiple government agencies. The strict regulations and requirements can make it difficult for smaller venues to obtain the necessary licences.
- **Zoning:** Zoning restrictions can limit the number of electronic music nightclubs in certain areas and make it difficult for these venues to find suitable locations.
- **Health and safety regulations:** Nightclubs must comply with strict health and safety regulations, which can add to the operational costs of the venue and limit the flexibility of the venue to host events.
- **Noise restrictions:** Electronic music nightclubs often face noise restrictions, which can limit the volume of music and limit the overall experience for patrons.

Venue closure / real estate issues

- **Rising rents:** The cost of real estate in urban areas is increasing, making it difficult for electronic music nightclubs to afford rent and maintain their operations.
- **Redevelopment:** Redevelopment of areas can lead to the closure of electronic music nightclubs, as landlords may choose to lease to other types of businesses.
- **Gentrification:** The gentrification of areas can also lead to the closure of electronic music nightclubs, as the demographics of the area change and new residents may not be interested in this type of entertainment.

Costs

Venues are struggling with costs across the board, including energy costs: The UK's hospitality businesses are facing a significant increase in energy bills, with the average bill rise for small businesses estimated at £3,889 and medium businesses facing an increase of £9,677, which could lead to many establishments closing their doors due to the costs[26]

[26] https://www.standard.co.uk/news/london/annual-energy-bills-increase-london-pubs-restaurants-once-government-support-ends-b1055214.html



Night-time businesses in the UK are facing a difficult situation as they struggle to make ends meet. According to a poll by the Night Time Industries Association (NTIA), 82.6% of these businesses are on a "knife edge", with 42.9% barely breaking even and 39.7% losing money, despite government energy support. The poll also found that 45.2% of respondents have seen a more than 200% rise in energy costs and are dealing with indirect costs from the supply chain. Independent businesses are being ignored, with a 13% decline in independent licensed businesses compared to 3% for chains. The Scottish Licensed Trade Association (SLTA) also found that 60% of bars and pubs are closing early or for full days and won't be operating to their full opening hours in the first quarter of 2023.[27]

The current cost crisis is seen as more of a challenge to business for some in the electronic music world than the pandemic was.

"... The pandemic was tough, but there was funding and furlough so we could pay people and, when things opened, do events. Since then, we have seen a major increase in costs for example, at Tramshed [a music and arts venue in Cardiff], our electricity bill has gone up 303%, The Mill [a multi-purpose warehouse space in Digbeth] has gone up 519%, and across our estate, it's gone up an average 280%. But it's not just that - every single cost has gone up: staffing has risen 22.8% in a year. Costs are tightening the margins, but we're in a good position due to our estate as we've been able to use our scale to get better deals and support from our main suppliers …"
- Ben Newby, COO, TEG Europe [28]

[27] https://www.thespiritsbusiness.com/2023/01/ntia-82-of-night-time-firms-on-knife-edge/
[28] TEG own, operate, co-promote, and programme the following venues throughout the UK, XOYO, TRAMSHED, THE CAMDEN ASSEMBLY, THE MILL, THE GLOBE, THE WAREHOUSE, THE FOUNDRY, ENGINE ROOMS, ASYLUM, SUB89

4. Potential solutions for supporting electronic music

This report is a comprehensive analysis of the industry's impact on commerce, communities and culture. It aims to provide a clear picture of the measurable economic impact, as well as the intangible benefits that cannot be easily quantified. While the report doesn't aim to provide comprehensive solutions to the challenges faced by the industry, it offers a starting point for discussions and serves as a call to action for policymakers, stakeholders, and enthusiasts alike.

To start with, the Government should appoint a nationwide nighttime economy adviser.

A nationwide nighttime economy adviser

Sacha Lord, a leading nightlife expert in the UK, is calling for the government to appoint a nationwide nighttime economy adviser to help the struggling industry during this tough period. Lord, who is currently serving as the Night Time Economy Adviser for Greater Manchester, believes that a national voice is needed to represent the hospitality sector, which has been impacted by closures due to the pandemic and rising energy prices.[29]

Non-partisan: He feels that the role would require a non-partisan approach. He wants the person in the role to have the freedom to not tow the party line and to fight for everyone, especially the independent businesses that make up the majority of the sector.

Responsibilities: The role of nationwide nighttime economy adviser will have the responsibility for setting out a vision for the industry and be accountable to it. According to Sacha Lord, the person in the role would need to present a blueprint of a vision to aid the industry for 12 months and perhaps three years. The role would represent hospitality across the UK and become a proper voice for the sector. The role would have to appeal to everyone and fight for everyone, especially the independent businesses that make up most of the sector.

How will it help? This role will help the ailing sector by providing a national voice for the hospitality industry and working towards a vision for the industry. The role will help to bring attention to the challenges faced by the industry, such as the impact of the pandemic and rising energy prices, and advocate for the needs of the industry. The role will also work towards greater protection for music venues, such as introducing the Agent of Change principle, which would make it the responsibility of developers to implement suitable soundproofing when building near existing music venues. This role will be crucial in rebuilding the sector from the bottom up and ensuring the survival of independent businesses that make up most of the sector.

[29] https://www.rollingstone.co.uk/music/news/government-should-appoint-night-time-economy-expert-says-parklife-boss-26434/

Other potential solutions

Beyond appointing a nighttime economy advisor we recommend easing regulatory burdens by simplifying licensing procedures and reducing requirements for nightclubs. Financial support in the form of grants or loans could also be provided to help clubs overcome challenges like real estate costs and health and safety regulations. The UK could also be promoted as a destination for electronic music, attracting tourists and generating revenue. Community involvement could be encouraged, as well as investment in electronic music education. Finally, gentrification and redevelopment, which can lead to the closure of electronic music nightclubs, could be addressed to protect the cultural heritage of these spaces.

- **Easing regulatory burdens:** The government could simplify licensing procedures and reduce the requirements for electronic music nightclubs, making it easier for these venues to obtain the necessary licences and operate successfully.
- **Providing grants or loans:** The government could provide financial support through grants or loans to help electronic music nightclubs overcome the challenges they face, including the cost of real estate and the cost of complying with health and safety regulations.
- **Promoting the UK as a destination for electronic music:** The government could promote the UK as a destination for electronic music, attracting tourists from around the world and generating significant revenue for the UK economy.
- **Encouraging community involvement:** The government could encourage community involvement in supporting electronic music nightclubs, including through the creation of community-led initiatives and the involvement of local businesses and organisations.
- **Investing in electronic music education:** The government could invest in electronic music education, providing young people with the opportunity to learn about and engage with electronic music and helping to ensure the continued growth and success of this genre of music.
- **Addressing gentrification and redevelopment:** The government could address gentrification and redevelopment, which can lead to the closure of electronic music nightclubs, protecting the cultural heritage of these spaces.

Industry perspectives

We gathered perspectives from several people at the heart of electronic music. Here's what they told us.

This is a significant moment in the history of UK electronic music:

"... When the Licensing Act came into effect in late 2005, bars were able to get the same duration of licences and closing times as clubs. There was definitely a bit of migration amongst the more commercial market towards bars, and some clubs were lost in that era. This is like the next moment when significant nails are going into the coffin. I'd imagine the bigger established players will be fine, but up and down the country, there are venues that are the lifeblood of the scene - often the smaller ones doing interesting things with inventive lineups - that are most in jeopardy …"
- Jules O'Riordan (AKA Judge Jules), Sound Advice

It is time for the government to step up:

"... Unlike other styles of music, electronic music has scarcely had any statutory funding assistance over the years. And yet the UK is a world leader in this field, having produced many world-class artists and world-beating events. Most of this has been achieved without any government help of any sort — and yet now that this portion of the entertainment sector is in financial difficulty, it is time for the government to step up. Electronic dance music venues and events have incredible tourist value and cultural kudos internationally, and need to be supported …"
- Carl Loben, Editor-in-Chief, DJ Mag

Governments in the UK needs to recognize the value of clubs and provide support, such as grants and assistance for soundproofing, to maintain vibrant communities:

"... We need the government to care about clubs. In Germany, the government gives clubs grants and assistance to help with soundproofing and enhancements so they can coexist with their local communities. They recognise that both are important. Here it often feels like governments are on the side of communities without recognising that, without clubs, we can't have vibrant communities! …"
- Lisa Rose-Wyatt (AKA Lisa Lashes), International DJ & Producer, Founder of the Lisa Lashes School of Music

Trying to determine what is "real music" or "real culture" and restricting certain types of music or cultural events to certain times is not the role of government or city councils, as culture cannot be legislated and should not be limited by personal biases:

"... It's not the job of the government or councils to dictate what culture is, how it's celebrated and performed. A city that truly champions music cannot discriminate against music communities. Live music, classical, open mic nights or dance music, the sound is irrelevant. As part of the city administration, our responsibility is to encourage well-run venues which uphold licensing conditions, we don't dictate the genre. City sonics belong to our musicians. Our job is to facilitate variety in the night time offer, we don't pick the playlist. …"
- Carly Heath, Night Time Economy Advisor for Bristol

Electronic music is real music. It is culture. It should be recognised as such. It is more culturally relevant than any other art form for many younger people.

"... Electronic music is more culturally relevant to certain demographics than anything else, but we often don't feel like we're recognised as culture. The biggest surprise for me was when we received our Culture Recovery Fund money - it actually brought a tear to my eyes, being considered by those in the know as being involved in the arts! Because for 20 years, we weren't. It was quite a revelation …"
- Pete Jordan, Director / Founder of Weird Science & MADE Festival

"... When the revised scope for the Culture Recovery Fund came out, I called Pete [Jordan]. He was like, "well, it's not for me, is it!" And I said go to the appendix - it says drum and bass, techno, house music - we're finally recognized! …"
- Ben Newby, COO, TEG Europe [30]

"... We didn't get any Culture Recovery Fund payments at all. We had no support through it despite two applications. We allegedly had 'no cultural worth' - that was their quote, which is insane …"
- Guy Robinson, Founder at Coalition Presents

Allowing venue closures at this scale has taken away a sense of community, family, and belonging for many people who found it in the club scene and its music:

"... The first club that I went into, Miss Moneypenny's in Birmingham, I dropped to the floor and said, "THIS is where everybody is." The music, the love from people, the compassion you feel from going into these clubs - it was a family. And a lot of the time, it is family for people because they don't have their own families - they were castaways, but when they went out to these clubs, they became one with the music and the people. I've got friends from 30 years ago that I met on the dance floor. I've been a godmother to their kids, and I've been their bridesmaid, and I've seen kids grow up. Where would I have got that before? I feel bad for the state of our venues and events because that was my life. That was literally my life …"
- Lisa Rose-Wyatt, International DJ & Producer, Founder of the Lisa Lashes School of Music

Different types of clubs serve different purposes:

"... For a long time, the mass population used mainstream nightclubs for drinking and dating, especially after the advent of the 'superclub'. With the decline of high street operators, there is once again a shift towards specialist music venues, focusing back in on community, and much less on the mechanic of dating. In my opinion, this will present some hugely exciting opportunities …"
- Guy Robinson, Founder at Coalition Presents

No underground cubs means reduced music streaming revenues and reduced global influence:

"... Underground clubs and small venues are Max Cooper's base - our biggest audience, and the place where we innovate and pioneer new audio-visual projects and experiences that we can take around the UK and export across the world. Our careers rise and fall on the strength of our opportunities in clubs like these, as a cultural seedbed for community and innovation. Without them, there is no career, streaming success or global reach and influence …"
- James Palmer-Bullock of The Wild Seeds, who represent Max Cooper, an electronic music artist with global influence who is known for his unique blend of classical, techno, and ambient music

[30] TEG own, operate, co-promote, and programme the following venues throughout the UK, XOYO, TRAMSHED, THE CAMDEN ASSEMBLY, THE MILL, THE GLOBE, THE WAREHOUSE, THE FOUNDRY, ENGINE ROOMS, ASYLUM, SUB89

The UK is a vital hub for the global dance music scene and plays an important role in the success of non-UK artists, also:

"... The UK electronic music market is a melting pot of diverse sounds and cultures, making it a vital hub for the global dance music scene. As a Dutch DJ and electronic music producer, I am constantly inspired and influenced by the innovative and boundary-pushing music coming out of the UK. When the rest of the world was still unaware of my music, the UK market was where I was first discovered as a teenager. I got my first residency in a town called Leicester and started doing more shows in the rest of the UK from there. Most of the bigger shows were heavily promoted in UK-based electronic music magazines like DJ Mag, Mixmag and M8, which at the time were distributed all over the world so this ended up spreading my name to a more global audience which in the end resulted in more global bookings and my international breakthrough. So you can definitely say that the UK will always hold a special place in my heart …"

- Don Diablo, Dutch DJ, digital artist, record producer, musician and songwriter

"... What England has meant to me is almost indescribable. Ever since I was a kid, I've had a connection with the UK. Living in The Netherlands placed me in a unique position music-wise as I was exposed to English music alongside what spilt over from the USA. So growing up, bands like Depeche Mode, Duran Duran, Cabaret Voltaire, Eurythmics, Yazoo etc, left a significant imprint on me that later proved be falling into place once I toured with Quadrophonia and played the early raves around England. It was exciting to be a part of and feel the energy of the music acceptance in ways I could only dream of. As a young child growing up and studying Saxophone and Orchestra, the erupting early 90's rave scene was amongst the craziest things I've ever seen. And towards the end of the 90s, deejaying at clubs like Cream, Turnmills, The Cross, Gatecrasher and more probably changed the way I look at dance music forever. From connecting with music professionals like Joanna at Massive records to being invited by Pete Tong to do an Essential Mix and getting my music to the right people showed me a bigger platform that was still and remains a bit in its infancy here in the Netherlands. Up for it crowds that let you know whether you're on it or not, sound systems that physically rattled your senses. The UK is where I have become more than I ever anticipated was possible. It was the catapult to an international career and where I've learned to have an intimate musical dialogue with my dance floor …"

- Lucien Foort, Rotterdam-based DJ and producer

This heritage and infrastructure need to be supported and protected to safeguard the future of the world-renowned UK electronic music industry:

"... Electronic Music's value and scale is often underestimated economically and misunderstood culturally at a government level. The importance of clubs and venue spaces as the foundations of the electronic music scene cannot be overstated. They are the seedbeds for developing talent; essential community spaces where new music is often heard first. This heritage and infrastructure need to be supported and protected to safeguard the future of the world-renowned UK electronic music industry …"

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

Government must consult with operators in the sector to create relevant and long-term support to help venues through the most challenging of times:

"... The electronic music scene in Birmingham is a hugely significant genre of the rich tapestry of the city's live music industry.

Against the backdrop of the most challenging period for venues operating in the nighttime economy, it would be negligent of us not to do everything we can, using every means at our disposal to preserve and safeguard the future of our electronic live music venues, nightclubs, niche night time venues and live music festivals.

Birmingham's electronic music scene is of significant cultural importance to our region. Providing employment, creating spaces for marginalised communities, and opportunities for creatives, artists, DJs, production specialists and others.

Our precious spaces create a significant and much-needed positive economic impact for our region, benefiting other local businesses, travel, the hotel sector, restaurants and others.

We must not deprive our city and those who visit it of opportunities for emerging and upcoming artists and musicians, and we must do all we can to ensure the continued survival of inclusive and safe spaces for marginalised communities.

Government must consult with operators in the sector to create relevant and long-term support to help venues through the most challenging of times. Delaying this process risks losing already struggling businesses, forever …"
- Lawrence Barton, Festival Director, Birmingham Pride

We need initiatives in this country, like ones in Germany and the Netherlands, that protect our nightclubs as the cultural institutions they are. However, we have an immediate crisis on our hands, and we need an emergency set of policies introduced that will support nightlife venues through the crisis and start to slow the well-documented current wave of closures:

"... Nightclubs are the lifeblood of the electronic music scene in the UK and the wider nightlife industry in general.

The UK has some of the best and most inspiring nightclubs in the world. We've also got a rich clubbing history that should be cherished, celebrated and preserved.

Unfortunately, I don't believe the local and national governments recognise this cultural heritage and instead treat nightclubs as entirely expendable or even irritations. They regularly grant planning permissions for developments that would likely cause venues to close, restrict licences to make operating venues economically untenable and offer little or no protection or financial support.

More recently, this has been compounded by a vicious cost-of-living and inflation crisis that has made the operating environment for nightclubs incredibly hostile and with no sign of any change in policy to help support venues.

In the long term, I'd like to see more initiatives in this country, like the ones that we see in Germany and the Netherlands, that protect our nightclubs as the cultural institutions they are. However, we have an immediate crisis on our hands, and we need an emergency set of policies introduced that will immediately support nightlife venues and start to slow the well-documented current wave of closures. It needs to happen, and it needs to happen quickly, or we are likely to see some of the best nightclubs, particularly the more underground and experimental venues, gone for good, and it will be very difficult to bring them back …"
- David Selby, CEO, Resident Advisor

The traditional 18-21-year-old market for clubs is increasingly concentrating the market into the major cities, and the clamour for residential development and high property prices have forced many clubs to disappear:

"... With electronic music dominating our dancefloors, there is no doubt that the appetite for it is as strong as ever. The influences electronic music has had over the last 30 years have shaped social life and events more than any other. With the advances in technology, the aspiring hitmaker has the opportunity to produce pro-level tracks from just a laptop. We will only see this grow.

Clubs play a huge role in this. Yet they have been declining to the point they need protection. It is a complex picture as to why this is the case but it is not simply due to a lack of demand or a change in tastes. When pubs could open past midnight, clubs lost their post-midnight monopoly, but that was back in 2005, and things have stabilised since then. Now we can see an acceleration of closures since COVID. Two of the factors I see as most prevalent are that the traditional 18-21-year-old market for clubs is moving into the major cities and property development.

There has been a steady increase in 18-year-olds heading for university over the last with 38% of people aged 18-21 being students, the knock-on effect has been to see many drawn to the cities for university at the expense of these smaller towns.[31]

Late-night trains, trams, 24-hour underground and cheap Uber taxis amplifies this exodus to the big cities. For example, Manchester is a thriving late-night destination, yet the surrounding towns such as Rochdale, Bury, Ashton, Oldham etc have nearly all lost their clubs and much of their late-night economy after the tram lines opened. Whilst the trams stop at midnight it is common for people to get the tram into the city and a cheap Uber back.

The second issue is property developers. There is far more profit to be made in residential redevelopment than leasing the building to a nightclub operator. This has particularly affected London, where the clamour for residential development and high prices have seen many clubs disappear. Only recently, in Watford, my own company has had a stay of execution with PRYZM that was likely to get planning consent for residential development until there was a public outcry led by the local MP Dean Russell. He understood the impact its closure may have on the surrounding businesses and the overall late-night economy. Even now, planning could be granted if the planners were minded to waive through the next application …"

- Peter Marks, Chairman, REKOM UK

[31] https://commonslibrary.parliament.uk/research-briefings/cbp-7857/

Case study: Motion, Bristol

How do you keep young people engaged with clubbing at a time when cost of living and post-Covid consumer habits were changing? We can learn lessons from Motion, Bristol via their work with Mustard Media, a festival and events marketing agency.

Motion Bristol is one of the most iconic clubbing institutes in the UK. Motion delivers weekly club events showcasing the best artists and labels across the spectrum of electronic music. Motion has been voted as one of the top 20 nightclubs in the world by DJ Mag and one of the best clubs in Bristol by Time Out.

The challenge

Post-Covid consumer habits, combined with a cost of living crisis, meant that clubbing habits in young people were changing. Younger generations had missed out on their 'rite of passage' into the club scene.

How we could keep young people in Bristol engaged with rave culture, with Motion at the heart of it?

The solution

The strategy focused on building Motion as the brand at the heart of Bristol's nightlife scene and shifting away from putting the artists' or label takeovers' branding at the forefront of Motion's marketing. Mustard Media created a brand message that encapsulated the heritage and importance of Motion to the fabric and culture of Bristol's nightlife scene - Keeping Bristol Moving. This narrative was delivered as a 360 campaign across branding, photography, video, copy, TOV, OOH, website and social content.

Mustard Media combined this with a ticket conversion marketing campaign. This included data collection campaigns, pre-sales with limited inventory, email retargeting, ticket urgency triggers, and partnerships to drive ticket sales for 87 shows across 12 months.

They landed on the creative lens: 'Keep Bristol moving', which will be rolled out as a 360 marketing campaign covering social, paid, out-of-home, and press.

- **Social:** Hero video, which told the story of clubbing culture for young people. This was launched with a huge competition to increase reach.
- **Paid media:** Amplified the hero video campaign
- **Out-of-home:** An out-of-home campaign promoted stills from the hero video and the tagline, "Keep Bristol Moving."
- **Offline:** A series of offline events will take place in Bristol throughout the year to engage the local audience, including pop-up events and student giveaways.
- **PR:** Mustard Media conducted research with Motion's audience to find out the impact that clubbing has on young people's mental health and well-being, resulting in coverage in 7 publications, including Mixmag and DJmag, with a total of 2m impressions.

Results: 35% increase in ticket sales (25,000 in 12 weeks). Total post engagements: 4.7k Likes, 4.3k comments, 1.9k shares, 358 Saves. Total reach: 37k. Total press: 14 placements with 241k views. Return on ad spend: £49. Motion's Instagram following up 2.5k.

Case study: Tramsheds, Grangetown, Wales

Tramshed is a unique and important music venue in Cardiff that has become a vital asset to the local economy and arts and culture sector. This case study explores the impact that Tramshed has had on the local community, the economy, and Welsh culture and arts. The significance of Tramshed lies in its role as a platform for a diverse mix of genres, its support of emerging talent and local acts, and its commitment to developing careers for young people and supporting the local community. This case study is important as it highlights the vital role that venues like Tramshed play in supporting and enriching local communities and the consequences of their closure.

A Unique Venue

Tramshed is a multi-use event space that has become a vital asset to the local economy and arts and culture sector in Cardiff, providing a platform for a diverse mix of genres, including electronic music. With a capacity of 1,000-1,200, the venue can be used for multiple events and is a key player in supporting emerging talent and promoting local acts. Tramshed is multi-room and can be used for multiple events, making it a valuable resource for local organisations.

Supporting the Local Community

Tramshed is located in Grangetown, a deprived area in Wales, and 50% of its management team are female, 25% BAME, and five regular freelancers are residents of the area. The venue provides opportunities for young people to develop their skills and supports the local community by offering free hire for community groups and working with Cardiff Radio to promote local acts. The venue is a point of local pride and has a wide-reaching impact on the economic growth of Grangetown and Cardiff.

A Significant Impact on the Economy

Tramshed has generated 391,000 visitors over two years and directly spent over £1 million on headline artists, support and local acts, reps, and various other suppliers. Many freelancers, technicians, and reps rely on Tramshed as their main source of income, and the venue is committed to developing careers for young people in hospitality.

A Hub for Welsh Culture and Arts

Tramshed plays an important role in Welsh culture by showcasing emerging Welsh talent and bringing world-renowned international artists to Cardiff. The venue has long-term relationships with local promoters and has hosted several festivals, connecting a diverse range of demographics, cultures, and age groups. Tramshed Cinema stages independent film and comedy events and serves as a rehearsal space for Jukebox Collective, a Black-led creative community.

The Importance of Tramshed

Tramshed fills a specific gap in Cardiff's music ecosystem, programming the largest variety of genres, including those considered higher risk by licensing, and serving underrepresented genres and demographics. If Tramshed had been unable to reopen, there would be a negative impact on the local economy, businesses, community groups, and employment. The venue is a key player in supporting musicians and enriching the musical talent pipeline. Its closure would decrease access to and engagement with the arts in Grangetown and Cardiff.

Case study: The Mill, a Cultural Hub in Birmingham

The Mill is a thriving multi-use event space located in the heart of Digbeth, Birmingham. This venue has become a cultural hub in a neighbourhood ranked among the 20% most deprived in England, providing a platform for diverse music genres and experiences that attract a broad range of ages, cultures, and demographics. This case study highlights the impact of The Mill on the local community and economy, as well as its commitment to diversity and inclusion through its programming, collaboration, and management practices. By examining the success of The Mill, we can see the importance of grassroots venues in revitalising deprived neighbourhoods and promoting cultural opportunities for all.

The Mill, a Cultural Hub in Birmingham

The Mill is a multi-use event space located in Digbeth, Birmingham, that serves a diverse range of ages, cultures, and demographics. With a focus on electronic music, it has become a key part of the Digbeth regeneration story, bringing high-level artists to the area that would not perform there otherwise.

A Place for Music Lovers

The Mill features three spaces, including a main room with a capacity of 700 for live concerts and 960 for DJ events, a second room with a capacity of 250 for live events and 400 for DJ events, and a roof terrace with a capacity of 300. The venue supports new promoters and artists, and collaborates with local organisations such as the Custard Factory, Weird Science, Birmingham Music Awards, and Digbeth Dining Club.

A Cultural Hub in a socially economically challenged Neighbourhood

Digbeth is ranked among the 20% most deprived neighbourhoods in England, and The Mill has sought to improve engagement with the arts through its programming and collaboration model. It is the only venue in the area that provides multi-genre music programming nationally and attracts a diverse audience of 150,000 people annually.

Digbeth is a neighbourhood in Birmingham that has faced significant social and economic challenges, making cultural investments like The Mill all the more important. By providing a platform for diverse music genres and experiences, The Mill is not only improving engagement with the arts, but it is also attracting tourism and supporting local businesses. The venue has become a key part of the Digbeth regeneration story and is a shining example of how grassroots venues can play a vital role in revitalising deprived neighbourhoods. The Mill's commitment to diversity and inclusion, both in its programming and management practices, is also making a positive impact on the community by promoting equal access to cultural opportunities. With cultural investments like The Mill, Digbeth is taking steps towards a brighter future and a more vibrant and inclusive community.

A Boost for the Local Economy

The Mill has a significant impact on the local economy, attracting tourism to Digbeth and hiring up to 100 people externally each week from local companies. The venue is also part of the BID for Digbeth initiative and is managed by a 50% female and BAME-led team with a diverse staff and support team.

A Commitment to Diversity and Inclusion

The venue is committed to improving access and diversity and has a Diversity and Inclusion program in place, underpinned by three core pillars: belonging, balance, and advocacy. The Mill is working to improve representation for under-represented groups, including disability employment, women in senior leadership, and ethnicity representation.

5. Conclusion

Electronic music has made a significant impact on the UK economy, from recorded music and publishing to live concerts, events, and festivals. **The measurable impact of electronic music is £2.63 billion to the economy.** The UK's electronic music scene also provides **numerous benefits to communities and culture**, serving as a platform for local artists and fostering inclusivity and tolerance. **Britain's reputation in the world is enhanced** by the many electronic music artists and genres that originated in the UK and then took the world by storm. *The UK would be worse off economically, socially, culturally and reputationally without electronic music.*

However, the UK's electronic music scene also faces several challenges, including licensing, zoning, the cost crisis and gentrification, which limit the number of electronic music nightclubs and increase their operational costs. We've lost a huge share of nightclubs and so opportunities for audiences, artists and industry professionals to find their groove. **This threatens to reduce the impact of electronic music on commerce, culture and community in the UK going forward. To ensure the continued growth and success of electronic music in the UK, it is important to address these challenges and find solutions that support the industry.**

Potential solutions include reducing regulatory burdens, providing financial support, promoting the UK as a destination for electronic music, encouraging community involvement, investing in electronic music education, and addressing gentrification and redevelopment. Appointing a nighttime advisor would help the government to understand and appreciate the sector. By taking these steps, the UK can support the growth and success of electronic music and ensure that it continues to contribute to the economy and communities. **The future of electronic music in the UK is bright, and with the right support, it will continue to thrive and make a lasting impact on the industry and the economy.**

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

Appendix 1: Silent nights? The risk of industry collapse

Electronic music culture has been a staple in the UK for decades, with its pulsing beats, vibrant energy, and unique sense of community. We've shown its incredible contributions to community, culture and commerce. However, this beloved and valuable scene is now facing a crisis that threatens to silence the sounds of its soul.

The hypothesis is simple: UK electronic music culture is in danger of entering a vicious spiral of decline. A perfect storm of economic, social, and technological factors is conspiring to make electronic music less accessible, less appealing, and less relevant to the UK public.

Factors Contributing to the Decline

- **Increased competition** from everything from gyms and coffee shops to online TV and music streaming platforms: With so much music available at the click of a button, people may be less likely to venture out to clubs and events. Plus healthier options like coffee shops and gyms are on the rise.
- **Strict regulations and licensing laws**: Rigid regulations and licensing laws can make it hard for clubs and venues to operate, leading to closures. This disproportionally hits smaller venues that are the seedbeds of the culture. Bigger venues taking the lion's share of the market would fundamentally change the landscape..
- **Changing cultural attitudes:** Younger generations may be less interested in partying, drinking and dating in the real world, preferring social media, digital dating, streaming services and metaverse entertainment.
- **Economic uncertainty:** The cost of living crisis and economic uncertainty may lead people to prioritise other expenses over attending events. People may opt for cheaper options of entertainment like house parties.

"... The price of going to see your favourite DJ and the cost of a night out has skyrocketed. Without local scenes, you have to go to big cities and events, which becomes very expensive. Not everyone can afford it, especially during the times we're in right now. We have to make clubbing and nightlife more accessible and not as expensive. Going to a club on a Friday night used to be the norm. Now, for many, it is reserved for special occasions they have to save up for …"
- Danny Howard, DJ, producer, and radio host, BBC Radio 1

Impacts of the Decline

- **Decreased exposure and demand for electronic music:** With fewer people participating in clubbing and nightlife events, there will be less exposure to and demand for electronic music.
- **Fewer opportunities for young artists to practise and develop their skills:** The decline of the scene means less opportunities for young artists to hone their craft and build their careers.
- **Decline in the quality and variety of electronic music:** A lack of new talent entering the scene will result in a decline in the quality and variety of electronic music.
- **Decreased participation in clubbing and nightlife events:** With fewer clubs and events, people will have less opportunity to practise and get into their groove / find their tribe, further perpetuating the decline of the scene.

"... One thing which is really bizarre is those two years of university students who went to Uni during the pandemic restrictions and so never really kind of got into clubs. I think it has to do with this whole word-of-mouth thing, which they didn't have. You turn up the universities and take time to explore alternate scenes to find your tribe. I don't think those years ever found their tribe. They go out less or go to very, very obvious places instead of the kind of underground clubs that are the heart of the scene …"
- Pete Jordan, Director / Founder of Weird Science & MADE Festival

UK electronic music culture can be seen to be at a crossroads. The decline of the scene will have far-reaching impacts, not just on the music itself but on the sense of community and belonging that it has fostered for so many years and the economic contribution right up to and including recorded music and its influence on other forms of culture and the UK's reputation in the world. It is up to industry leaders, government officials, and music enthusiasts to work together to preserve and support electronic music culture in the UK. Don't let the beats fall silent.

Case study: The view from Nottingham Trent Students' Union

We recently caught up with James Slater of Nottingham Trent Students' Union to uncover the pulse of the ever-evolving nightlife scene. James shared insights on the rise of must-visit clubbing destinations in cities like London and Manchester, the impact of TikTok on the hotspots young people flock to, and the aftermath of the pandemic on their behaviours. He also delved into the shifting student demographics and the decline of student nightclubs, as well as the cost of living crisis affecting their choices. Here's a glimpse into the future of nightlife and clubbing for the younger generation.

The Changing Landscape of student Nightlife: The Impact of TikTok, Pandemic, and Cost of Living

Rise of Experienced-based clubbing in London and Manchester

Many city venues are raising the bar for excellence when it comes to production, customer experience and lineup. But at a time when young people have less money and want to follow what TikTok says is the hottest place to be, then your typical towns and cities are going to suffer. Students are ditching their SU's and local venues to head out further afield for a more rounded full experience of clubbing.

The Pandemic's Effects on Young People's Behaviors

The Pandemic and Post-Pandemic have a lot to answer for. Students' movement, behaviours, and legacy have mostly been lost. Our biggest challenge is trying to re-engage our audience and embed the old traits and ways of doing things. Young people are more reliant on digital content, so pulling them away from their sofa and their mobile is where it starts.

Changing Student Demographics in Universities

It is becoming increasingly common for older students to pursue higher education, resulting in a rising average age among university students. This trend is a testament to the value and benefits of ongoing learning and professional development, as well as the flexibility that many universities now offer to accommodate a diverse student body

International, postgraduate and mature students can bring significant funding to universities and income to the general economy. But they are much less likely to frequent nighttime establishments, and as a result, student night-time hotspots and Student Unions are in decline. Club nights are decreasing in popularity. Activity events like game shows are more popular. This means that your traditional Students' Union, which was basically a nightclub, is either closing or reducing in size to become more multi-use for things like conferences, which can pay the bills.

Daytime and healthy alternatives

We're seeing that more young people want daytime alternatives so they can go to bed at midnight and hit the gym the next morning. However, very few operators are delivering daytime raves and club events.

Cost of Living Crisis for Young People

This cost of living crisis is hitting all walks of life. We are seeing students on the National News talking about how the rising cost of bills and outgoings leaves them making tough choices. There simply isn't the financial support to explore new spaces and cutting-edge pockets of our communities that there once was. Student funding has not been growing with inflation, and students who once filled local towns and cities Monday-Sunday for student nights, are now cherry-picking what night will be the most valuable to them.

TikTok's Impact on Local Venues. AKA The Convenience of TikTok Creativity

The rise of Tik Tok means that young people have a world of discovery and creativity at their fingertips. Whether it's seeing the awe-inspiring production coming out of Warehouse Project or Printworks or discovering the hottest new beats from upcoming artists - there is less reason to get up and physically get yourself down to the venues to find out what's hot, You can now be ahead of the curve the very moment creativity drops online. And if you want production, well, you'll save to go to WHP or Printworks.

House Parties are Back Once Again

House parties have grown in popularity amongst young people. Unregulated, cheap and with the local talent behind the decks playing their tunes produced at home - it's accessible and costs a fraction compared to entry tickets and spending over the bar.

The Decline in Student Nightclubs and Student Unions

The popularity of traditional student clubs is declining as more students opt for private gatherings, such as house parties, before attending club events and leaving early to continue the festivities elsewhere. This has resulted in decreased attendance and shorter peak times for these clubs as students leave earlier to have 'afters'.

Universities' Shift Away from Promoting Nightlife

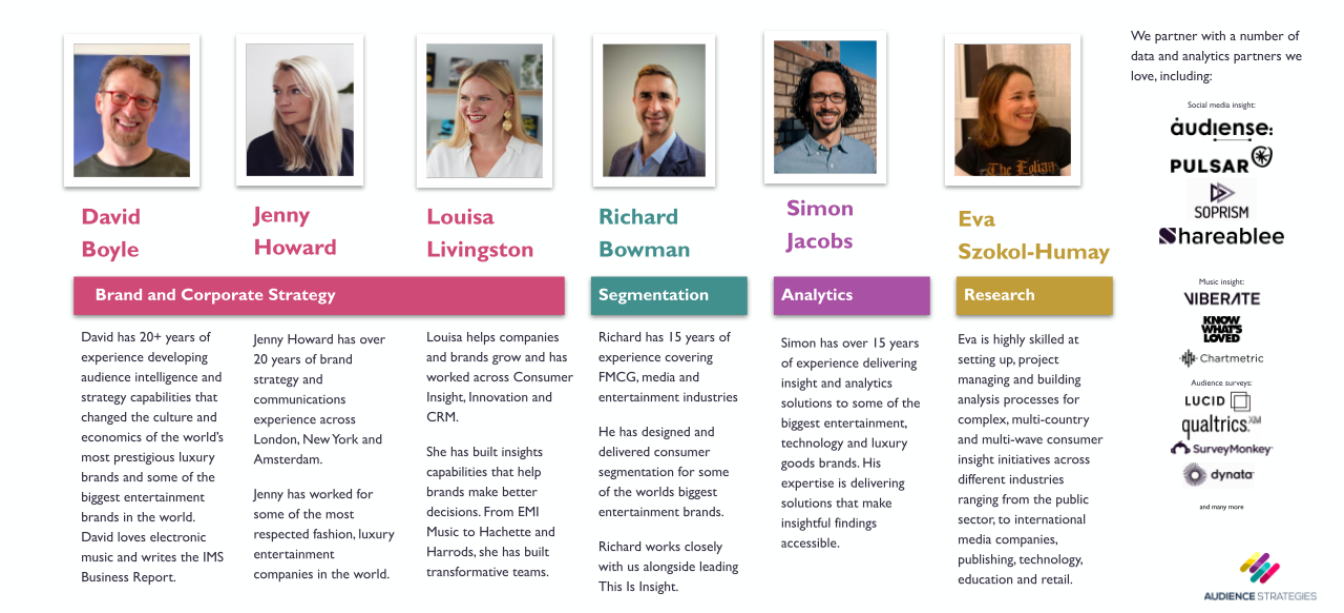
Universities' traditional support of the nighttime economy and active promotion to students when they arrive in a City is waning and has already disappeared in many places. Universities would rather their students discover cafes, activity centres and tourist attractions.

There is a lack of recognition and understanding from establishments and institutions regarding the positive impact that venues can have on wellness, well-being, community, and culture building.

Appendix 2: About Audience Strategies

This report was written by David Boyle of Audience Strategies. Any questions: david@audiencestrategies.com

David has 20+ years of experience using technology to develop audience intelligence and strategy capabilities in the creative industries. His work has changed the culture and economics of the world's most prestigious entertainment and luxury brands, including EMI Music, HarperCollins Publishers, BBC, MasterClass and Harrods. David runs Audience Strategies, an agency that helps brands use a deep understanding of their audiences to drive growth. David writes the annual IMS Business Report, the annual NTIA UK Electronic Music Report and the annual Trapital Hip-Hop Report. David co-wrote PROMPT, A practical guide to brand growth using ChatGPT - the first book written about and with ChatGPT.



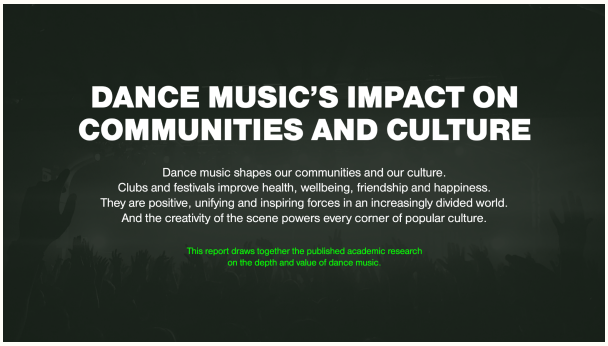


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