

ELECTRONIC EXCURSIONS

An Insider's Guide To Club Culture Capitals

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FOREWORD BY

MICHAEL KILL | VICE PRESIDENT, INTERNATIONAL NIGHTLIFE ASSOCIATION
CEO, NIGHT TIME INDUSTRIES ASSOCIATION

The global electronic music sector is being reshaped by a powerful convergence of cultural, technological and economic forces, many of which are explored in depth throughout this report. What we see across these leading cities is not a singular narrative, but a collection of dynamic, interconnected ecosystems, true cultural melting pots, each with its own identity, vision and pathway to the future.

From Ibiza's continued role as a global innovator to Berlin's recognition as a site of cultural heritage, from London's relentless genre innovation to Amsterdam's progressive governance, and from the emerging energy of Dubai and Tulum to the hybrid cultural integration seen in Barcelona and Miami, these cities are not simply destinations, they are laboratories of creativity and innovation.



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AUDIENCE STRATEGIES



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CEO, NIGHT TIME INDUSTRIES ASSOCIATION

What this report makes abundantly clear is that electronic music is no longer defined solely by sound, it is being shaped by a series of transformative forces. The evolution of venues into hybrid, multi-purpose cultural spaces reflects a broader shift in how audiences engage with nightlife, blending music, work, wellness and community into a single experience. At the same time, the global soundscape itself is being redefined, with African-influenced electronic music and cross-cultural programming driving a new era of musical fusion and diversity.

Equally important is the evolution of audiences. No longer confined to a single demographic, electronic music now attracts a broader, more sophisticated and globally connected community. This expansion, alongside the return of experienced, higher-spending audiences, signals a maturation of the sector, one that demands authenticity, cultural depth and meaningful experiences over traditional models of consumption.

These shifts are underpinned by a growing recognition of the sector's economic and

cultural value. Across the cities analysed, electronic music tourism is generating billions in economic impact, supporting local economies while enhancing global reputation and influence. In this context, nightlife has become far more than entertainment, it is a form of soft power. It shapes how cities are perceived internationally, attracts talent and investment, and positions destinations as hubs of creativity, openness and innovation.



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CEO, NIGHT TIME INDUSTRIES ASSOCIATION

At the same time, new forces are emerging that will define the next chapter of this industry. Climate adaptation is reshaping seasonal programming, remote work is extending travel patterns and creating “semi-resident” audiences, and sustainability is becoming central to venue design and operations. Meanwhile, the continued institutional recognition of electronic music, as seen in Berlin, signals a broader shift towards valuing nightlife as an integral part of cultural infrastructure.

What unites all of these cities is not uniformity, but diversity of vision. Each is forging its own path, whether through scale, authenticity, innovation or integration with wider cultural and tourism strategies. Together, they demonstrate how electronic music culture can drive success not only in terms of cultural capital, but as a catalyst for wider economic growth, social connection and creative exchange.

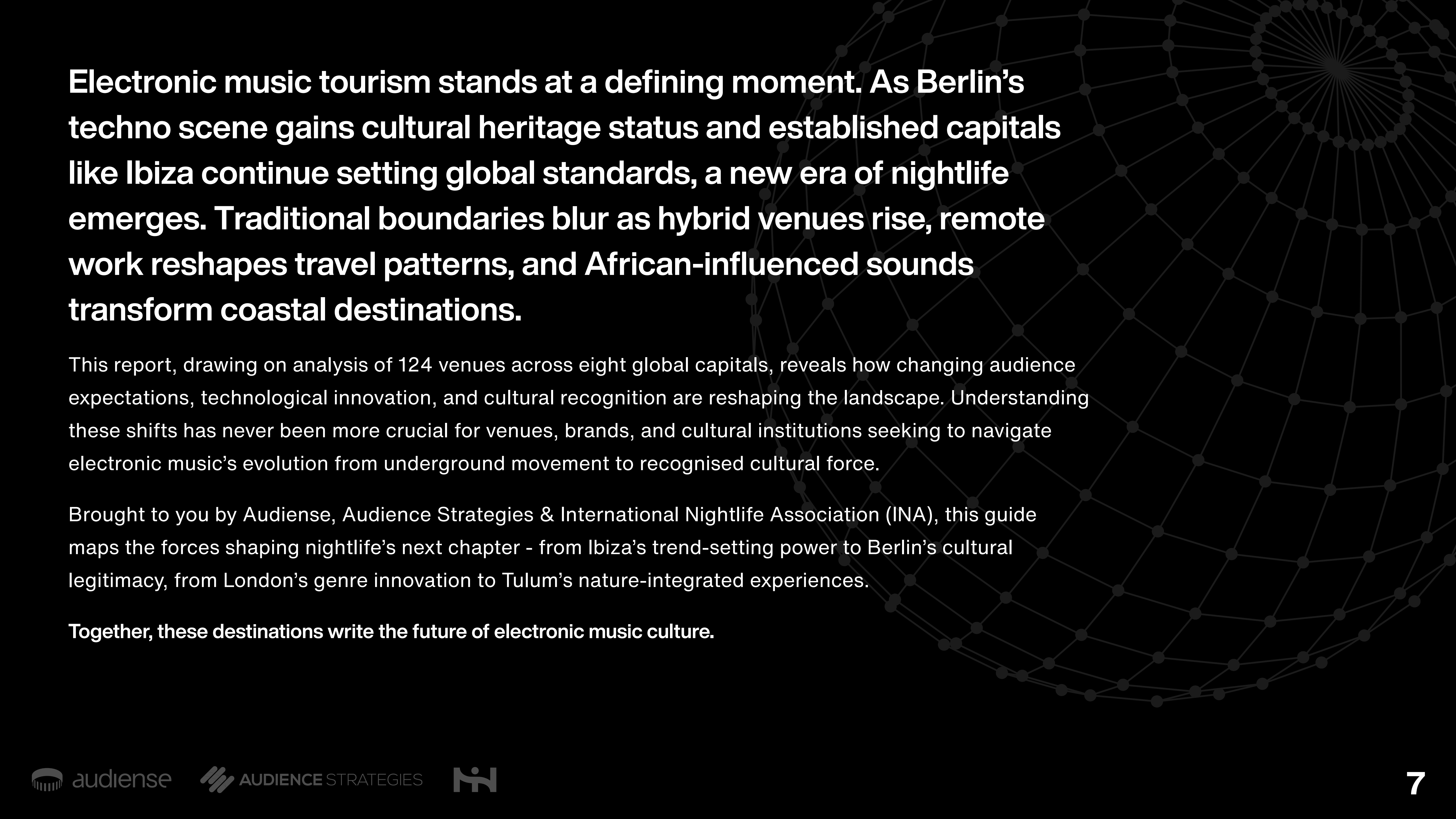
This report serves as both a reflection and a roadmap. It highlights the importance of recognising and supporting these

ecosystems, ensuring they continue to evolve sustainably while maintaining the authenticity that underpins their global appeal.

As we look ahead, it is clear that these hubs of creativity will continue to lead the way, shaping the future of nightlife, influencing global culture, and reinforcing the role of electronic music as one of the most powerful and unifying forces in the modern world.

THE FUTURE OF NIGHTLIFE IS BEING SHAPED NOW





Electronic music tourism stands at a defining moment. As Berlin's techno scene gains cultural heritage status and established capitals like Ibiza continue setting global standards, a new era of nightlife emerges. Traditional boundaries blur as hybrid venues rise, remote work reshapes travel patterns, and African-influenced sounds transform coastal destinations.

This report, drawing on analysis of 124 venues across eight global capitals, reveals how changing audience expectations, technological innovation, and cultural recognition are reshaping the landscape. Understanding these shifts has never been more crucial for venues, brands, and cultural institutions seeking to navigate electronic music's evolution from underground movement to recognised cultural force.

Brought to you by Audiense, Audience Strategies & International Nightlife Association (INA), this guide maps the forces shaping nightlife's next chapter - from Ibiza's trend-setting power to Berlin's cultural legitimacy, from London's genre innovation to Tulum's nature-integrated experiences.

Together, these destinations write the future of electronic music culture.



MAPPING THE FUTURE OF ELECTRONIC MUSIC TOURISM

DISTINCT POSITIONS

Ibiza

Maintains global leadership. Ushuaïa Ibiza lands in the top five across every country we studied, spearheading Ibiza's dominance as the island claims 5 of the world's 10 most in-demand electronic music venues.

London

Leads venue diversity with 205 established clubs

Berlin's

Techno scene achieves cultural heritage status

Amsterdam

Demonstrates sustainable nightlife governance

Dubai

Emerges as luxury-focused destination

Tulum

Pioneers nature-integrated experiences

TRANSFORMATIVE TRENDS

Musical Evolution

African-influenced sounds reshape the scene

Venue Innovation

From flagship clubs to hybrid cultural spaces

Premium Evolution

Beyond bottle service to authentic experiences

Audience Expansion

Growing sophistication across age groups

Climate Adaptation

Destinations rethinking seasonal patterns

Cultural Recognition

Electronic music gains institutional support



ELECTRONIC MUSIC:

FROM UNDERGROUND TO CULTURAL HERITAGE

Berlin's techno scene joins Germany's national registry of intangible cultural heritage, marking a pivotal moment for club culture



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AUDIENCE STRATEGIES



UNDERSTANDING CLUB CULTURE CAPITALS:

HOW WE DID IT

CITIES:

Eight key destinations that shape the scene.

ESTABLISHED CULTURAL CENTRES

Ibiza

The undisputed capital of electronic music tourism, setting industry standards

London

A birthplace of numerous genres. An innovation hub despite market pressures

Berlin

Techno scene added to Germany's national registry of intangible cultural heritage

Amsterdam

Showing how progressive governance can nurture a sustainable ecosystem

EMERGING & EVOLVING MARKETS

Barcelona

Successful integration of electronic music within broader cultural tourism

Miami

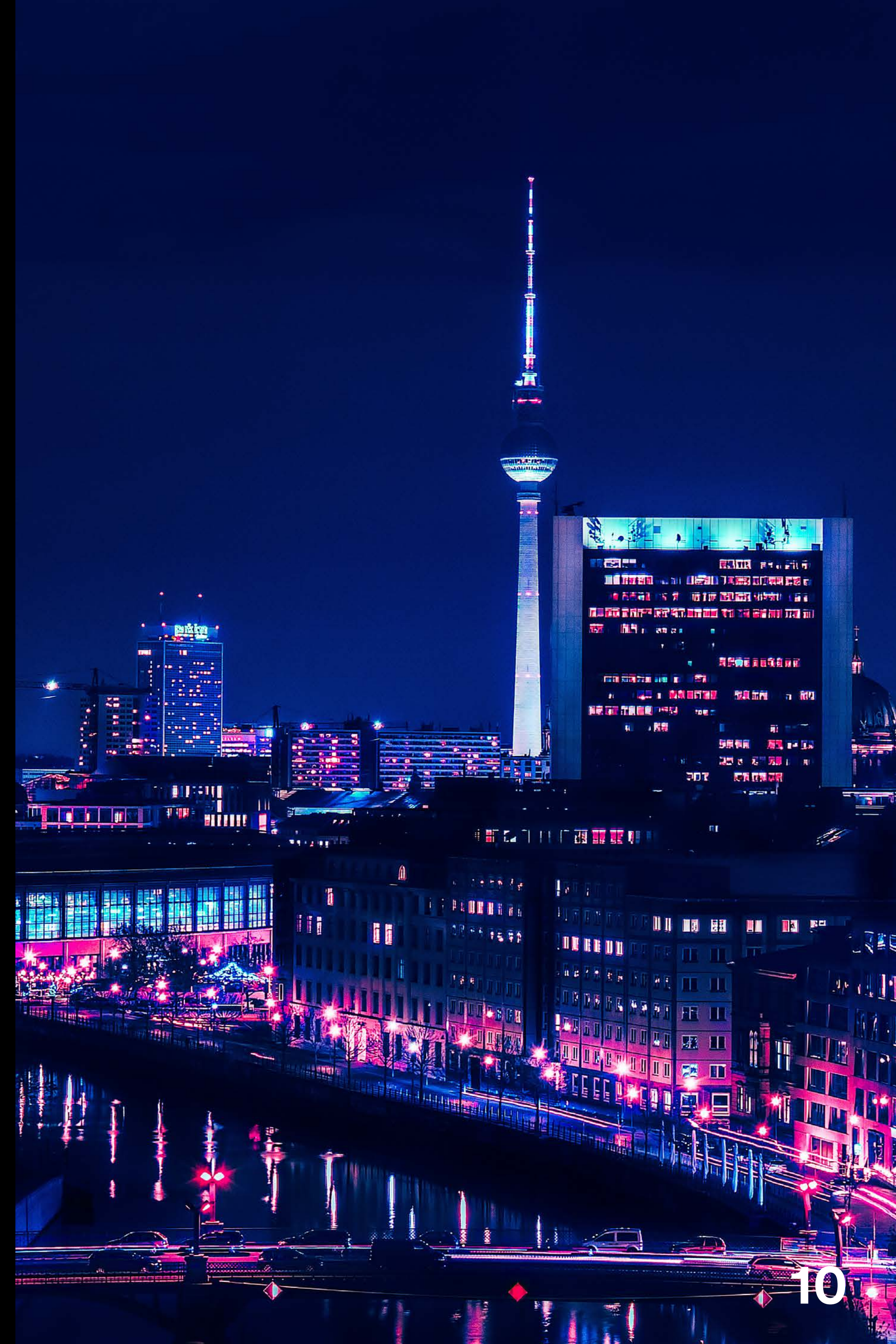
A crucial bridge between North American, European and Latin America

Dubai

The emergence of luxury-focused electronic music tourism in the Middle East

Tulum

Showcasing the evolution of nature-integrated electronic music experiences



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UNDERSTANDING CLUB CULTURE CAPITALS:

HOW WE DID IT

METHODOLOGY:

We analysed five dimensions of each city

Audience Segmentation:

Used Audiense's social & digital intelligence tools to identify distinct demographic patterns and interest clusters among followers of leading electronic music venues in each city

Venue Demand:

Relative demand for 124 nightclubs / festivals using Audience Strategies' Pulse tool (powered by Audiense) by combining searches, social media following, and web traffic data across multiple platforms, weighted to ensure fair comparison

Venue Numbers and Size:

Active venues using Resident Advisor data (January 2026), defining "established" clubs as those with 5+ followers and 10+ events in 2025, analysing capacity ranges and event programming

Travel Demand:

12 months of Google flight search data (Sept 2024-Aug 2025) across seven countries in multiple languages to understand tourism patterns and preferences

The DJ Scene:

Analysed Resident Advisor's database of active DJs to quantify each city's professional music community, examining factors like number of resident DJs, performance frequency, and audience size.



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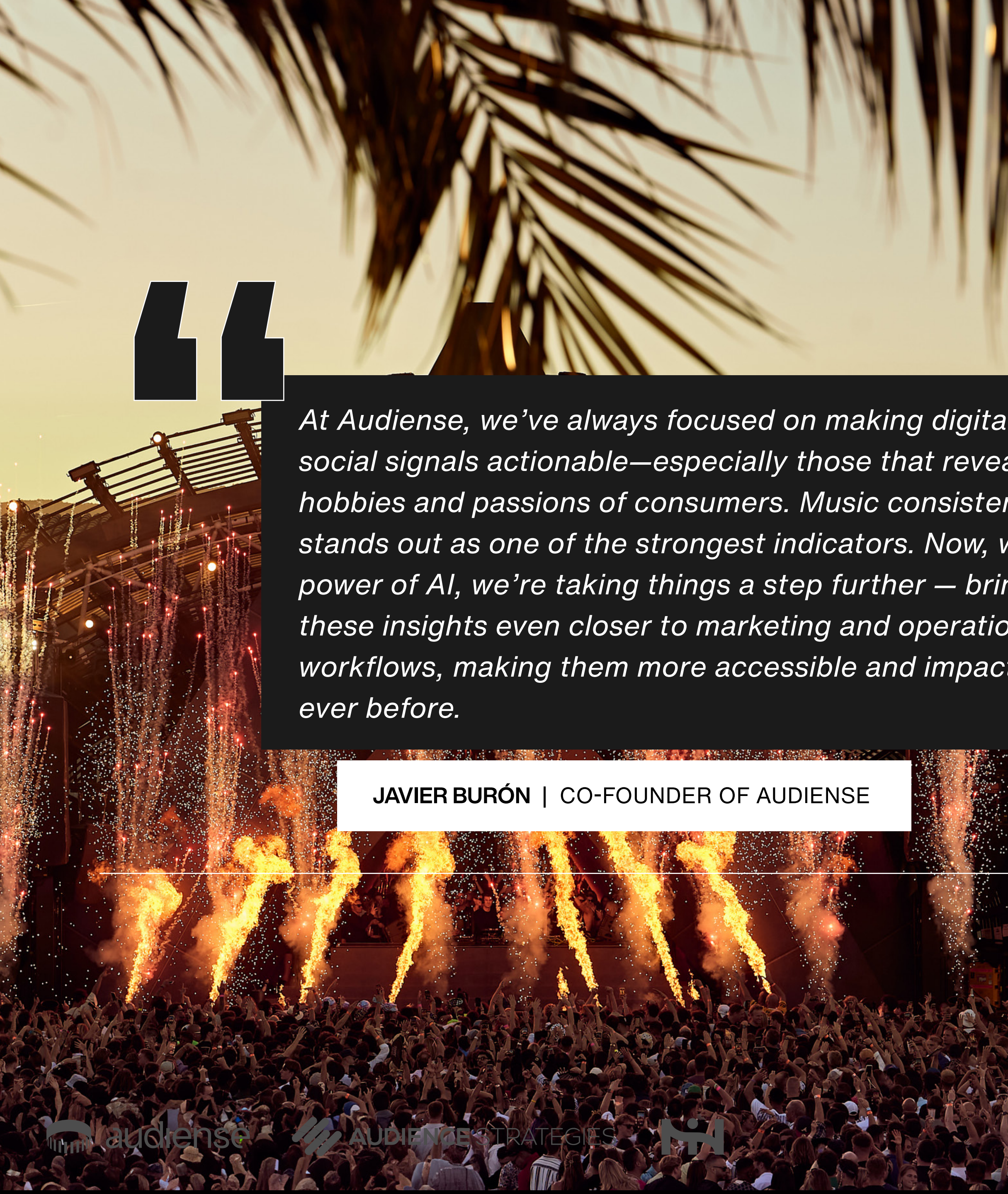


“

At Audiense, we've always focused on making digital and social signals actionable—especially those that reveal the hobbies and passions of consumers. Music consistently stands out as one of the strongest indicators. Now, with the power of AI, we're taking things a step further — bringing these insights even closer to marketing and operational workflows, making them more accessible and impactful than ever before.

JAVIER BURÓN | CO-FOUNDER OF AUDIENSE

”



UNDERSTANDING CLUB CULTURE CAPITALS:

HOW WE DID IT

INTERVIEWS:

In-depth interviews with industry leaders.

Jose Luis Benitez

Director Relaciones Institucionales,
Palladium Hotel Group

Dr. José Ramón Cardona

Professor, Escuela Universitaria de Turismo del
Consell Insular de Ibiza

Katie Bain

Director of Billboard Dance and Senior Music
Correspondent at Billboard Magazine

Carl Loben

Editor, DJ Mag

Mirik Milan

Co-Founder, VibeLab

Gregory Piet

Head of Solutions for Audiense

Javier Burón

Co-Founder of Audiense





BIG

THEMES



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AUDIENCE STRATEGIES



1

**VENUES
EVOLVE:**

From Superclubs
to Hybrid Spaces

2

**THE GLOBAL
SOUND
EVOLUTION:**

African
Electronic
Renaissance

3

**DIVERSE
AND GLOBAL:**

The New Face of
Electronic Music
Tourism

4

**BEYOND
BOTTLE
SERVICE:**

Redefining VIP
Culture

5

**BEYOND
THE BEAT:**

The Ripple Effect
of Electronic
Music Tourism

6

**FUTURE
FORCES:**

Reshaping
Electronic Music
Tourism

7

**NEW
HORIZONS:**

Culture Meets
Commerce



VENUES EVOLVE:

FROM SUPERCLUBS TO HYBRID SPACES

KEY VENUE TYPES:

FLAGSHIP CLUBS

Example: Hï Ibiza - only club to win World's Best Club four consecutive years (2022–2025)

- Sets global standards
- Professional management
- Investment in cutting-edge sound
- UNVRS became the first club to win in its opening year

BOUTIQUE SPACES

Example: About Blank, Berlin

- Intimate experiences
- Underground sounds
- Community focus

BEACH & NATURE VENUES

Example: Papaya Playa Project, Tulum

- Natural settings
- Daytime programming
- Experiential focus



VENUES EVOLVE:

FROM SUPERCLUBS TO HYBRID SPACES

EMERGING TRENDS:

HYBRID VENUES

“... Modern venues blend culture, work, and music under one roof ...”

Mirik Milan, VibeLab

TECH INTEGRATION

- Digital ticketing
- Immersive productions

SUSTAINABILITY FOCUS

- Plastic-free initiatives
- Energy efficiency
- Community integration



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VENUES EVOLVE:

FROM SUPERCLUBS TO HYBRID SPACES

KEY FACTS:

LONDON
LEADS WITH

205

ESTABLISHED VENUES

'Established:' 5+ RA followers
and 10+ RA events in 2025

10 OF IBIZA'S
VENUES EXCEED

2K

CAPACITY

80%

OF BARCELONA'S
VENUES ARE
INTIMATE SPACES
(<500 CAPACITY)

On RA. Amongst those with
known capacity



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AUDIENCE STRATEGIES

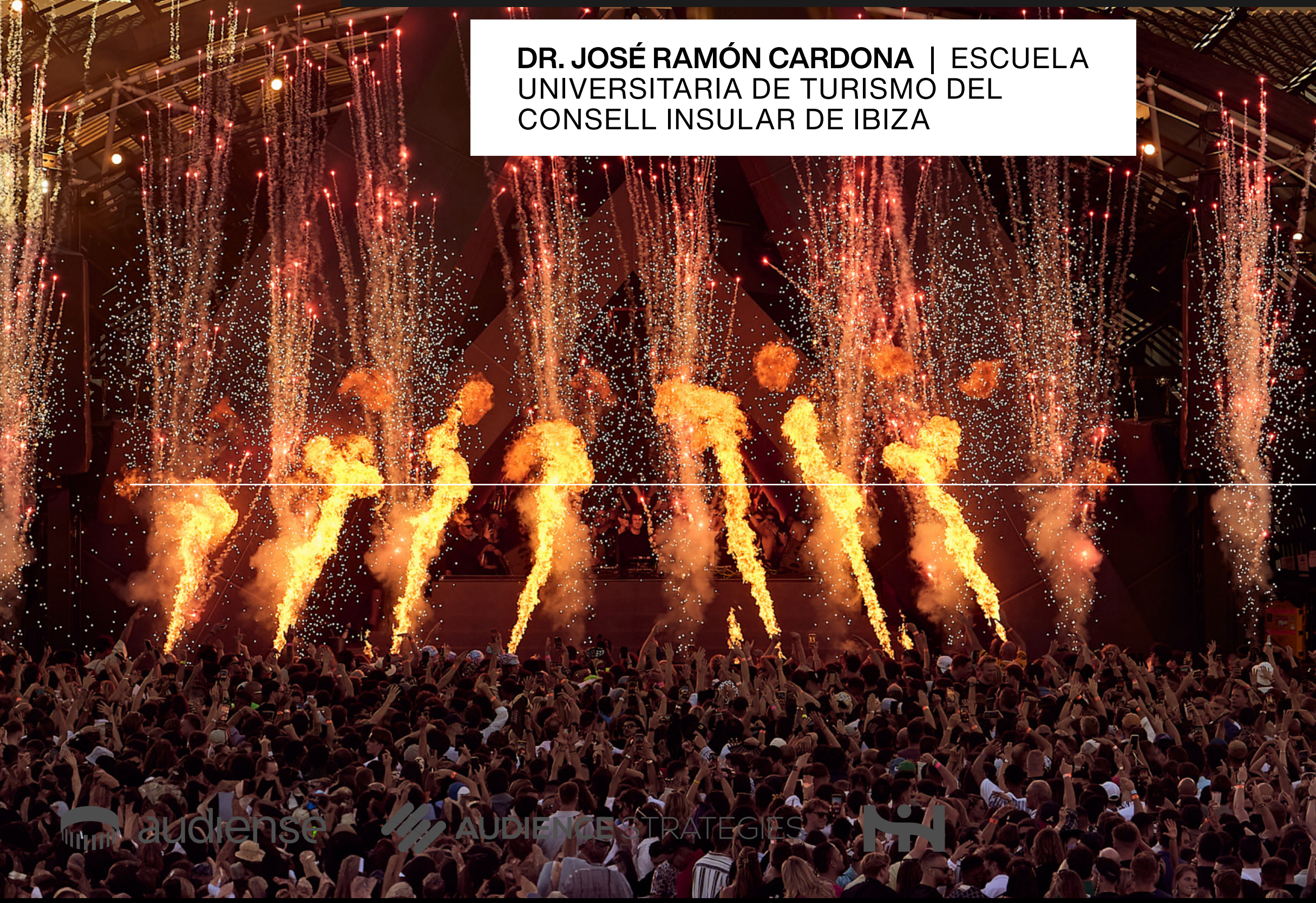


“

*Large nightclubs are the flagship of the sector
and fundamental to Ibiza's media impact...*

DR. JOSÉ RAMÓN CARDONA | ESCUELA
UNIVERSITARIA DE TURISMO DEL
CONSELL INSULAR DE IBIZA

”



THE GLOBAL SOUND EVOLUTION:

AFRICAN ELECTRONIC RENAISSANCE

CORE STATS:

50%

OF EVENTS
FEATURE
HOUSE MUSIC

LONDON'S
DIVERSITY:

11

GENRES APPEARED
AT AT LEAST
5% OF EVENTS

HIGHEST HOUSE
MUSIC PRESENCE:

77%

OF EVENTS
IN TULUM

41%

TECHNO IN
AMSTERDAM
(HIGHEST SHARE)

“

A lot of the exciting new music within the electronic world is coming from Africa, especially South Africa...

”

CARL LOBEN
EDITOR, DJ MAG



Source: Analysis of Resident Advisor data by Audience Strategies for Audiense, 2025.



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THE GLOBAL SOUND EVOLUTION:

AFRICAN ELECTRONIC RENAISSANCE

REGIONAL SIGNATURES:



COASTAL VIBES

- African-influenced sounds dominate beach destinations
- Tulum leads with 28% of events
- Ibiza & Dubai embrace at 10-15% of lineups



CITY SOUNDS

- Berlin: House 39% / Techno 37% balance
- London: Leader in genre diversity
- Amsterdam: Strong electronic roots



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DIVERSE AND GLOBAL

THE NEW FACE OF ELECTRONIC MUSIC TOURISM

DEMOGRAPHIC SHIFT:

AGE EXPANSION

SEGMENTED
DUE TO ECONOMIC
STRATIFICATION

CORE AUDIENCES
- YOUNGSTERS AS
WELL AS ADULTS
WITH HIGHER
SPENDING POWER

SOPHISTICATED
MUSICAL TASTE

RETURN OF
EXPERIENCED
RAVERS

Source: Audiense Social & Digital Intelligence

Source: Based on Audiense Social & Digital Intelligence, analysis of 124 venues across eight global destinations using Resident Advisor venue & DJ data, 12 months of Google flight searches in seven countries, and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.

“

It used to be primarily a young person's game, but now you see people in their 40s and 50s returning to the dance floor with more disposable income...

”

CARL LOBEN
EDITOR, DJ MAG



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DIVERSE AND GLOBAL

THE NEW FACE OF ELECTRONIC MUSIC TOURISM

DEMOGRAPHIC SHIFT:

GLOBAL REACH

IBIZA:

32%
UK AUDIENCE
14%
SPANISH

DUBAI:

37%
UAE,
STRONG SAUDI
PRESENCE

TULUM:

67%
MEXICAN
AUDIENCE

AMSTERDAM:

ONLY
19%
DUTCH
FOLLOWERS

Source: Audiense Social & Digital Intelligence



“

We've seen millions of visitors pass through our island, always with British tourists as number one. But the proximity of the island and its magic attracts all types of nationalities...

JOSE LUIS BENITEZ | DIRECTOR RELACIONES INSTITUCIONALES, PALLADIUM HOTEL GROUP

”



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BEYOND BOTTLE SERVICE:

REDEFINING VIP CULTURE

“



There's a new kind of VIP experience emerging—intimate shows where the exclusivity comes from simply being able to attend...

”

KATIE BAIN | DIRECTOR OF BILLBOARD DANCE AND SENIOR MUSIC
CORRESPONDENT AT BILLBOARD MAGAZINE



TRADITIONAL PREMIUM:

ESTABLISHED MODEL

- Dedicated teams
- Personalised configurations
- Relationship building
- Enhanced access



NEW EXCLUSIVITY:

EMERGING TRENDS

- Intimate performances
- Limited capacity events
- Musical authenticity
- Cultural immersion



CASE STUDY:

HÏ IBIZA VIP EXPERIENCE

- Custom venue setups
- Personalised planning
- Regular client relationships
- Music-first philosophy

Source: In-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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BEYOND THE BEAT:

THE RIPPLE EFFECT OF ELECTRONIC MUSIC TOURISM

ECONOMIC IMPACT:

DRIVING GROWTH

- A substantial share of Ibiza's GDP from nightlife sector
- €1.25 billion annual visitor spend in Amsterdam
- 6 of Top 100 clubs located in Ibiza
- Multiple revenue streams beyond tickets

SUCCESS STORIES:

HÏ IBIZA

- World's Best Club five times (2018, 2022–2025) — unprecedented four consecutive wins
- Global talent hub
- 2,000+ artists annually
- Sets industry standards

CULTURAL RECOGNITION:

EMERGING TRENDS

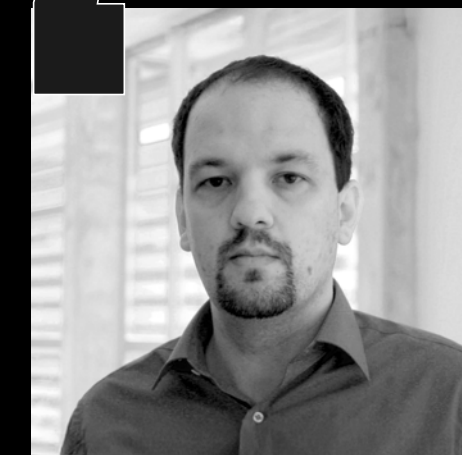
- Berlin techno scene joined Germany's national registry of intangible cultural heritage
- VibeLab's "Night School" nurtures new talent
- Government support
- Cross-cultural exchange through music

SOCIAL IMPACT:

COMMUNITY BENEFITS

- Career development pathways
- Cultural exchange platforms
- Environmental initiatives
- Local business growth

“



The most important value of nightlife is its impact on Ibiza's reputation, with the impact of this reputation being an increase in tourist revenue...

”

JOSÉ RAMÓN CARDONA | PROFESSOR,
ESCUELA UNIVERSITARIA DE TURISMO DEL
CONSELL INSULAR DE IBIZA

Source: In-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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FUTURE FORCES:

RESHAPING ELECTRONIC MUSIC TOURISM



CLIMATE & SEASONS:

ADAPTING TO CHANGE

- Destinations rethinking peak seasons
- Flexible indoor-outdoor spaces
- Flexible use clubs: Redemption daytime yoga at fabric, London
- TNL's year-round model: Ibiza (summer) + Dubai Harbour (winter) programming



REMOTE WORK IMPACT:

THE EXTENDED STAY

- “Semi-resident” audiences emerge
- Workation-friendly destinations
- Month-long cultural seasons
- Deeper community engagement



Source: Analysis of using Resident Advisor venue & DJ data and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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FUTURE FORCES:

RESHAPING ELECTRONIC MUSIC TOURISM

KEY STATS:

INCREASING
NUMBER OF
EVENTS DURING
DAYTIME

80%
OF BARCELONA
VENUES UNDER 500
CAPACITY - PERFECT
FOR HYBRID USE

On RA. Amongst those with known capacity

“

Modern venues blend culture, work,
and music under one roof...

”

MIRIK MILAN | VIBELAB



Source: Analysis of using Resident Advisor venue & DJ data and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.

NEW HORIZONS:

CULTURE MEETS COMMERCE



GENRE EVOLUTION:

SOUND FUSION

- African influences reshape global sounds
- Traditional genres meet emerging styles
- Cross-cultural programming
- Local-global balance



CULTURAL RECOGNITION

INSTITUTIONAL EMBRACE

- Berlin's cultural heritage status:
Government support growing
- Sustainable development focus
- Community integration

Source: In-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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NEW HORIZONS:

CULTURE MEETS COMMERCE

ACTION POINTS:

STRATEGIC PRIORITIES

- ✓ Invest in flexible venues
- ✓ Create extended-stay offerings
- ✓ Balance authenticity with innovation
- ✓ Embrace cultural heritage
- ✓ Lead in sustainability

“

*Electronic music tourism is no longer just entertainment
— it's becoming recognized cultural heritage...*

”

CARL LOBEN
EDITOR, DJ MAG



Source: In-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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CLUB CULTURE CAPITALS



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IBIZA→

Setting the Global Standard

LONDON→

The Innovation Hub

BERLIN→

Where Techno Became Heritage

AMSTERDAM→

Progressive by Design

BARCELONA→

Where Intimacy Meets Intensity

MIAMI→

Where Continents Converge

DUBAI→

Luxury Meets Underground Energy

TULUM→

Electronic Music's Eco-Luxe Frontier





8 CLUB CULTURE CAPITALS

ESTABLISHED CENTRES

IBIZA

8 of Top 100 Clubs

“Sets global standards in nightlife excellence”

LONDON

205 established venues

“Where genres are born and trends emerge”

With 5+ RA followers and 10+ RA events in 2025

BERLIN

Cultural heritage status

“Underground authenticity meets cultural recognition”

AMSTERDAM

€1.25 billion annual visitor spend

“Progressive policies nurture sustainable nightlife”



“

Each city writes its own chapter in the story of electronic music culture, contributing something unique to the global nightlife narrative...

”

RUFY GHAZI | AUDIENCE STRATEGIES

Source: Based on Audiense Social & Digital Intelligence, analysis of 124 venues across eight global destinations using Resident Advisor venue & DJ data, 12 months of Google flight searches in seven countries, and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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AUDIENCE STRATEGIES





8 CLUB CULTURE CAPITALS

EMERGING FORCES

BARCELONA

80% intimate venues

“Where culture meets clubbing”

On RA. Amongst those with known capacity

MIAMI

US market leader

“The Americas’ electronic crossroads”

DUBAI

33% large-scale venues

“Luxury meets underground energy”

On RA. Amongst those with known capacity

TULUM

28% African-influenced sound

“Nature-integrated experiences”

FAST FACTS

577

Established* venues analyzed

* those with 5+ RA followers and 10+ RA events in 2025

12,855

Events tracked in 2025

On RA

31,509

Active DJs studied

On RA

7

Countries’ travel patterns studied

Using Google search trends

124

Venues in detailed demand analysis

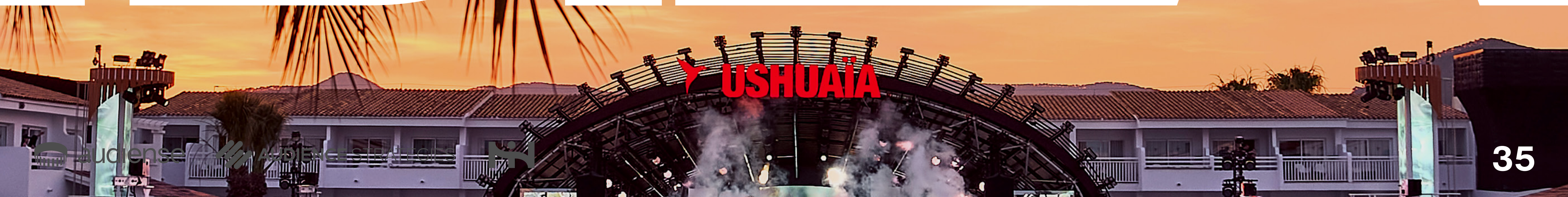
Pulse Analysis of 124 global venues

Source: Based on Audiense Social & Digital Intelligence, analysis of 124 venues across eight global destinations using Resident Advisor venue & DJ data, 12 months of Google flight searches in seven countries, and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.

THE UNDISPUTED CAPITAL OF
ELECTRONIC MUSIC TOURISM



BIZA





“

Ibiza starts trends, what plays first in summer in Ibiza goes on to play in the rest of the world...

JOSE LUIS BENITEZ | DIRECTOR RELACIONES INSTITUCIONALES, PALLADIUM HOTEL GROUP

”



IBIZA:

SETTING THE GLOBAL STANDARD

SCALE & IMPACT

8 of the World's Top 100 Clubs with [UNVRS] (new entry) hitting #1 in 2026

Hï Ibiza named World's Best Club five times (2018, 2022–2025), with Ushuaïa Ibiza ranked #3 in DJ Mag 2026

30% of venues exceed 2,000 capacity

On RA. Amongst those with known capacity

With The Night League's transformation of Privilege into [UNVRS], Ibiza continues to push the evolution of large-scale nightlife experiences.

706 club events in 2024

On RA

A substantial share of GDP from nightlife

**[UNVRS] opened May 2025
as the world's first 'hyperclub'**

Entered DJ Mag Top 100 Clubs at #1 in 2026

INA Golden Moon Awards 2025

TNL venues swept top three positions

MUSICAL IDENTITY

67% House Music

26% Techno

13% Ambient / Chillout

10% African-influenced genres

22% Daytime events

Source: Analysis of all events in 2025 on RA

SCENE DYNAMICS

25 established venues

With 5+ RA followers and 10+ RA events in 2025

Strong international appeal

**Balanced ecosystem from boutique
to superclub**

**Highest concentration of large
venues globally**

On RA. Amongst those with known capacity



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AUDIENCE STRATEGIES



Source: Based on Audiense Social & Digital Intelligence, analysis of 124 venues across eight global destinations using Resident Advisor venue & DJ data, 12 months of Google flight searches in seven countries, and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.

32% UK audience

14% Spanish following

Strong global reach

High rate of return visitors

**“Electronic Music Ambassadors”
make up 26% of audience**

IBIZA AUDIENCE SNAPSHOT

Source: Audiense Social & Digital Intelligence

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN IBIZA

Ibiza's position as the **undisputed capital of electronic music** tourism translates into exceptional economic impact. Our analysis reveals how this small island generates **outsized financial value** through its world-class nightlife ecosystem.



SNAPSHOT →

23 established venues creating an iconic nightlife landscape

2,327 electronic music events identified across 2026

Over 4.1 million club attendances throughout the year

924,668 dedicated music tourists travelling specifically for electronic music experiences

IBIZA

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN IBIZA

ECONOMIC CONTRIBUTIONS

Ibiza's electronic music sector generates an estimated \$1.51 billion total economic impact, comprising:

\$493.2 million in direct and indirect nightclub impact

- Venue entry fees
- In-venue spending (primarily beverages)
- Preparation costs (clothing, personal care)
- Pre-venue dining and transport

\$1.02 billion in additional tourist-related economic impact

- Transportation to Ibiza
- Accommodation expenses
- Extended stays beyond club nights

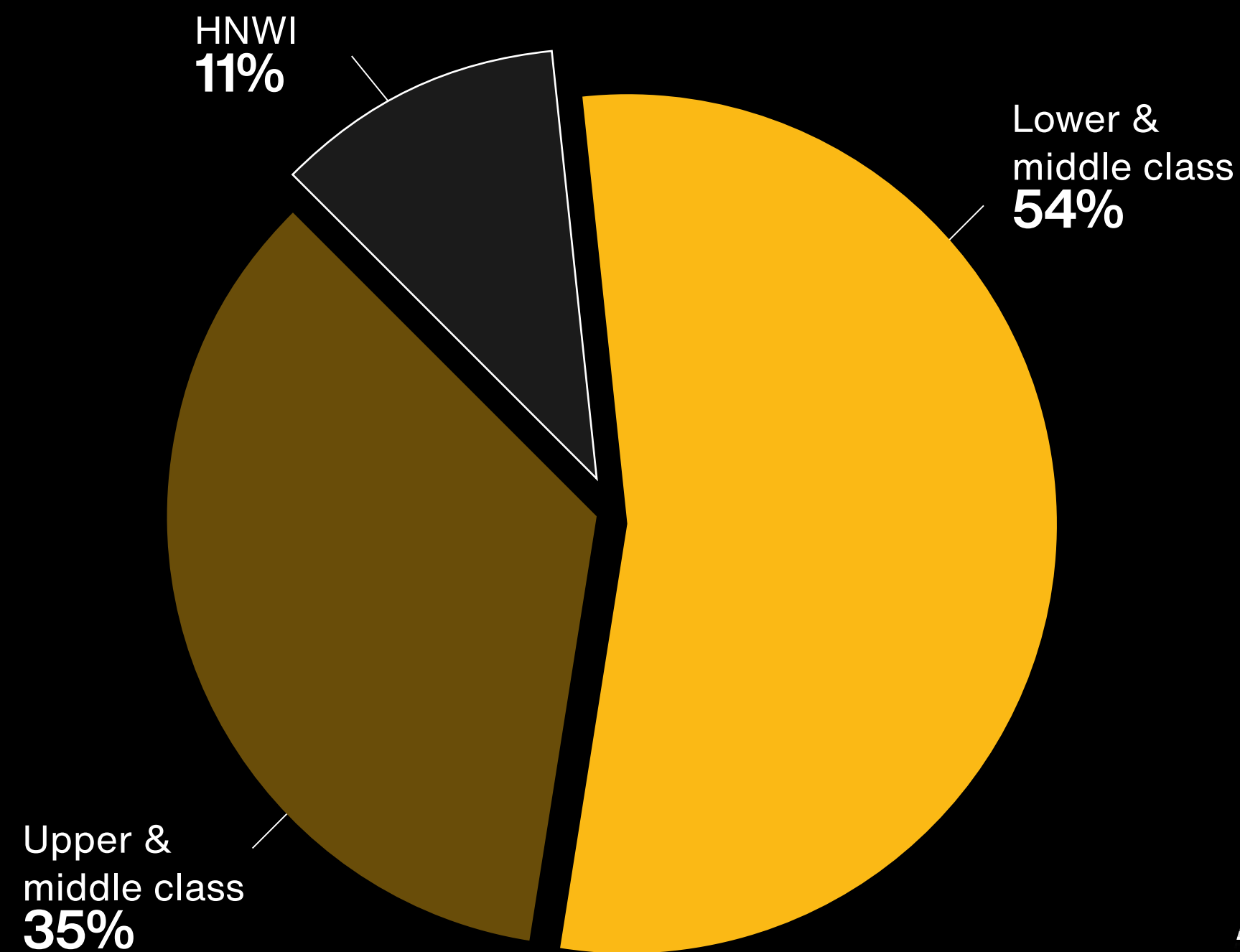
COMPARATIVE POSITION

Ibiza demonstrates **remarkable economic efficiency**, generating the third-highest total economic impact despite having just **23 venues**.

The island's focused tourism model, with over **22% of all club attendances** coming from tourists, creates substantial value. With nearly **\$1.51 billion** in total economic impact, Ibiza proves that quality, reputation, and international appeal can drive **extraordinary economic returns**.

HOW IS THAT \$1.51 BILLION SPENT IN IBIZA?

Type of spenders attracted by nightlife (1,244,000 global Meta™ users)



Where they spend?

- Luxury resort experience buyers
- Resort experience buyers
- Gourmet experience buyers
- Destination experience buyers
- Seaside experience buyers
- Champagne experience buyers



IBIZA

- An analysis of 1,244,000 global Meta users revealed that **54% of the island's nightlife enthusiasts are seen as lower to middle class**. Indicating that the assumption of Ibiza having a VIP only culture is mistaken with only **11% classified as high-net-worth individuals**.
- The spending habits of our nightlife audience indicates that they **seek out experiences over simply the destination**. The audience shows a high interest in quality gourmet dining and beach experiences, driving strong engagement.
- Notably, **27% of nightlife spenders are associated with champagne experiences**, underscoring their strong affinity for premium and celebratory purchases. **Meanwhile, beer remains a key preference for 49% of this group**.
- Additionally, **all nightlife spenders (100%) express an interest in food and eating out**, presenting a **significant opportunity for the restaurant and hospitality industries** to develop diverse and high-quality culinary experiences.
- Finally, 34% of nightlife spenders show **a strong interest in art exhibitions**, rating them with five stars, representing a potential **growth area for multi-discipline creative activations**.

THE INNOVATION HUB LONDON



“

...London has been the birthplace of groundbreaking genres like drum and bass, jungle, dubstep, and UK garage, making it a key player in the global electronic scene...

CARL LOBEN | EDITOR, DJ MAG

”



LONDON:

THE INNOVATION HUB

SCALE & IMPACT

205 established venues

With 5+ RA followers and 10+ RA events in 2025

13,378 active DJs

DJs with upcoming events on RA

3,658 events in 2024

On RA

145 DJs with 10,000+ followers

On RA

MUSICAL IDENTITY

46% House Music

18% Techno

11 Different genres at >5% of events

15% Daytime programming

**Unique UK sounds: Drum & Bass,
Garage**

SCENE DYNAMICS

Most diverse programming globally

Strong local-international balance

79% intimate venues (<500 capacity)

On RA. Amongst those with known capacity

**Highest concentration of professional
DJs**

Analysis of RA data

Source: Analysis of all events in 2024 on RA

Source: Based on Audiense Social & Digital Intelligence, analysis of 124 venues across eight global destinations using Resident Advisor venue & DJ data, 12 months of Google flight searches in seven countries, and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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AUDIENCE STRATEGIES





49% UK audience

26% London-based

Strong “Techno Enthusiast” segment

9% US following

Bridge between European and North American scenes

LONDON AUDIENCE SNAPSHOT

Source: Audiense Social & Digital Intelligence

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN LONDON

London's diverse electronic music scene generates **substantial economic value** that enhances its cultural significance. Our analysis reveals a robust ecosystem delivering **impressive financial impact** across the city's economy.



SNAPSHOT →

205 established venues creating the most diverse nightlife landscape studied

11,071 electronic music events identified across 2024

Over 43.1 million club attendances throughout the year

1.08 million dedicated music tourists travelling specifically for electronic music experiences

LONDON

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN LONDON

ECONOMIC CONTRIBUTIONS

London's electronic music sector generates an estimated \$1.94 billion total economic impact, comprising:

\$862.6 million in direct and indirect nightclub impact

- Venue entry fees
- In-venue spending (primarily beverages)
- Preparation costs (clothing, personal care)
- Pre-venue dining and transport

\$1.08 billion in additional tourist-related economic impact

- Transportation to London
- Accommodation expenses
- Extended stays beyond club nights

COMPARATIVE POSITION

London demonstrates powerful economic performance with the **second-highest total economic impact** among studied cities.

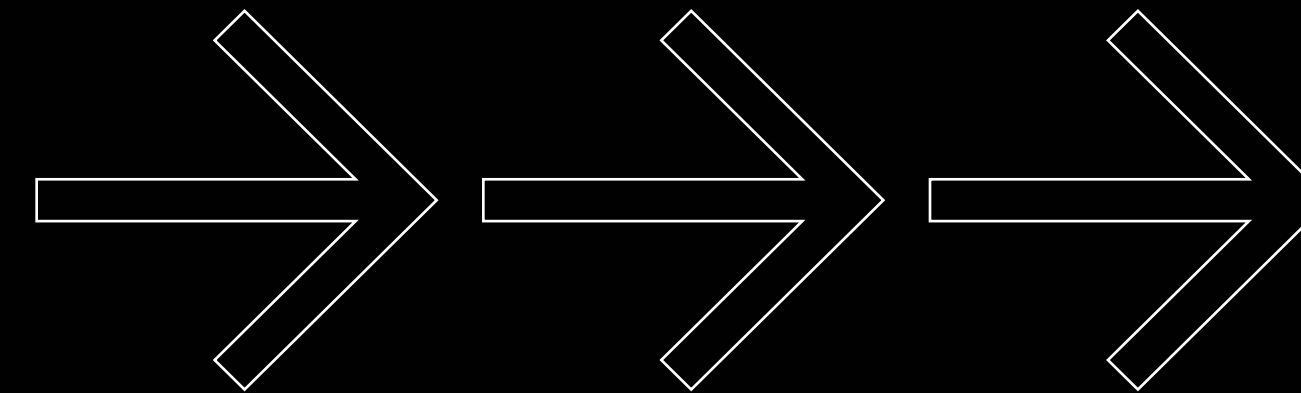
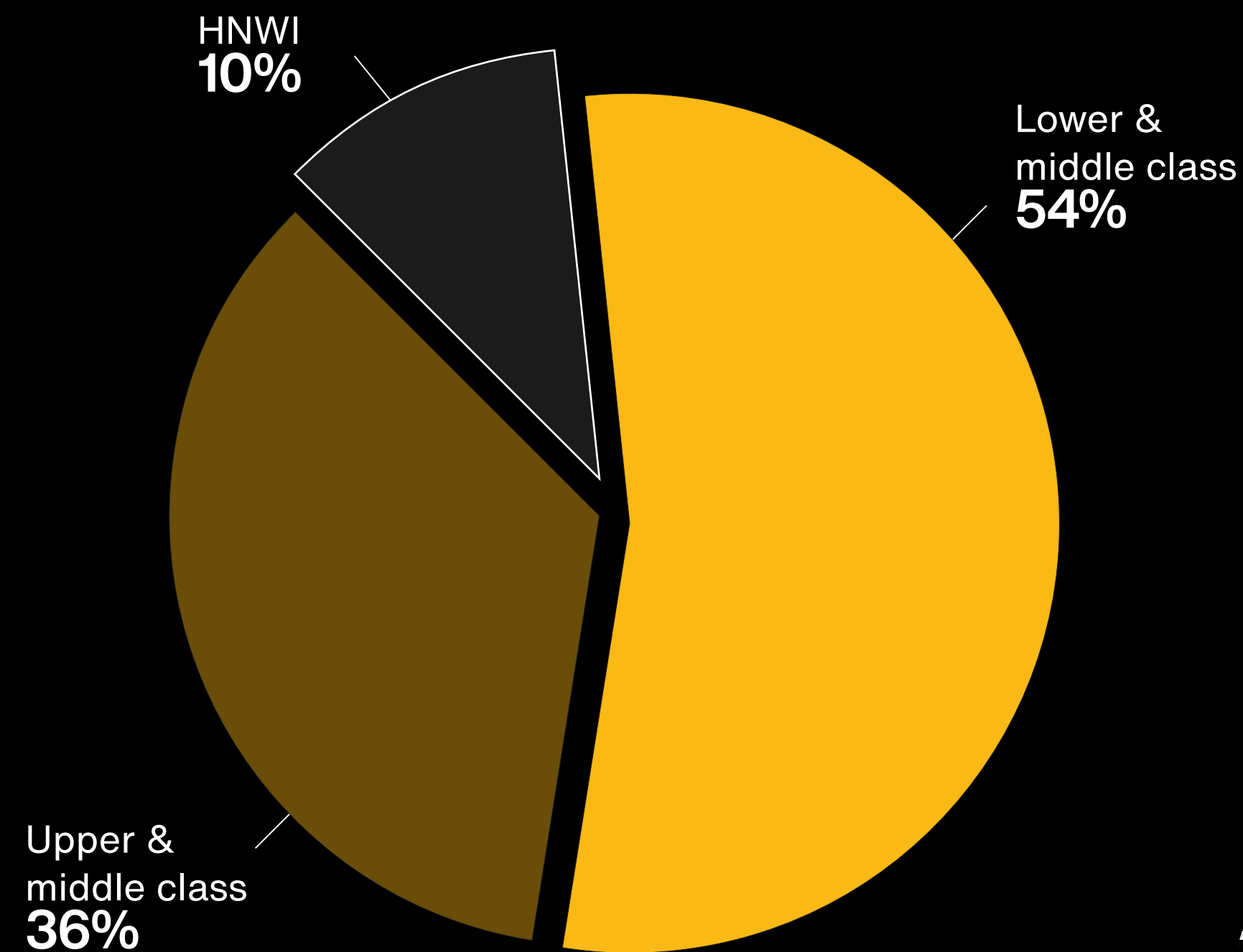
As a birthplace of numerous electronic music genres, London leverages its cultural capital into **substantial financial returns**.

With the **highest number of venues** and events, London shows how scale and diversity can create significant economic value, despite having a lower percentage of tourist attendances than destinations like Ibiza.



HOW IS THAT \$1.94 BILLION SPENT IN LONDON?

Type of spenders attracted by nightlife (4,526,000 global Meta™ users)



Where they spend?

- Luxury resort experience buyers
- Resort experience buyers
- Gourmet experience buyers
- Destination experience buyers
- Champagne experience buyers



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AUDIENCE STRATEGIES



NONO

- Based on data from **4,526,000 global Meta users**, this analysis reveals that 54% of nightlife enthusiasts belong to the lower and middle-class, followed by 36% in the upper middle class and 10% classified as high-net-worth individuals (HNWIs).
- For nightlife spenders, **the experience itself takes priority over the destination**. The audience shows a strong preference for **luxury hotels and gourmet dining** while more affordable hotels still generates solid interest.
- Notably, **24% of nightlife spenders engage with champagne experiences**, highlighting their preference for premium and celebratory drinks. Meanwhile, **wine** and **beer** stand out as the **top choices**, appealing to **50%** of this audience.
- Additionally, **a significant part of nightlife spenders have an interest in luxury clothing brands like Chanel (59%) and Hermès (49%)** presenting an opportunity to develop around fashion tourism with diverse **fashion events and high luxury shopping districts**.
- **50%** of the nightlife spenders express a strong interest in **architecture**, rating it five stars.
This suggests a potential attraction to **iconic architectural landmarks** and unique **design experiences**.

WHERE TECHNO BECAME HERITAGE

BERLIN





“

Berlin, particularly with techno music... they have really embraced electronic music, so the local authorities are supportive, not just with licenses, but financially sometimes...

CARL LOBEN | EDITOR, DJ MAG

”



BERLIN:

WHERE TECHNO BECAME HERITAGE

SCALE & IMPACT

146 established venues

With 5+ RA followers and 10+ RA events in 2025

11,886 active DJs

DJs with upcoming events on RA

3,968 events in 2024

On RA

67 DJs With 10+ upcoming bookings

On RA

MUSICAL IDENTITY

39% House Music

37% Techno

12% Experimental

10% Ambient/Chillout

9 Different genres

at >5% of events

Source: Analysis of all events in 2024 on RA

SCENE DYNAMICS

Added to Germany's national cultural heritage registry

68% intimate venues (<500 capacity)

On RA. Amongst those with known capacity

9 of Germany's top 10 venues

Pulse Analysis of 124 global venues

Strongest domestic loyalty among all cities

Pulse Analysis of 124 global venues

Source: Based on Audiense Social & Digital Intelligence, analysis of 124 venues across eight global destinations using Resident Advisor venue & DJ data, 12 months of Google flight searches in seven countries, and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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AUDIENCE STRATEGIES



28% German audience

24% UK/US combined

Strong underground credibility

High concentration of resident DJs

**Authentic cultural
authenticity maintained**

BERLIN AUDIENCE SNAPSHOT

Source: Audiense Social & Digital Intelligence

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN BERLIN

Berlin's electronic music scene, recently granted **cultural heritage status**, generates remarkable economic value that matches its cultural significance. Our analysis reveals a **powerful economic engine** driving substantial benefits for the city..



SNAPSHOT →

**146 established venues forming
a diverse and influential nightlife
landscape**

**8,938 electronic music events
identified across 2024**

**Over 27.8 million club attendances
throughout the year**

**2.08 million dedicated music tourists
travelling specifically for electronic
music experiences**

BERLIN

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN BERLIN

ECONOMIC CONTRIBUTIONS

Berlin's electronic music sector generates an estimated \$2.40 billion total economic impact, comprising

\$834.3 million in direct and indirect nightclub impact

- Venue entry fees
- In-venue spending (primarily beverages)
- Preparation costs (clothing, personal care)
- Pre-venue dining and transport

\$1.56 billion in additional tourist-related economic impact

- Transportation to Berlin
- Accommodation expenses
- Extended stays beyond club nights

COMPARATIVE POSITION

Berlin shows **exceptional economic performance**, generating the highest total economic impact among all studied cities.

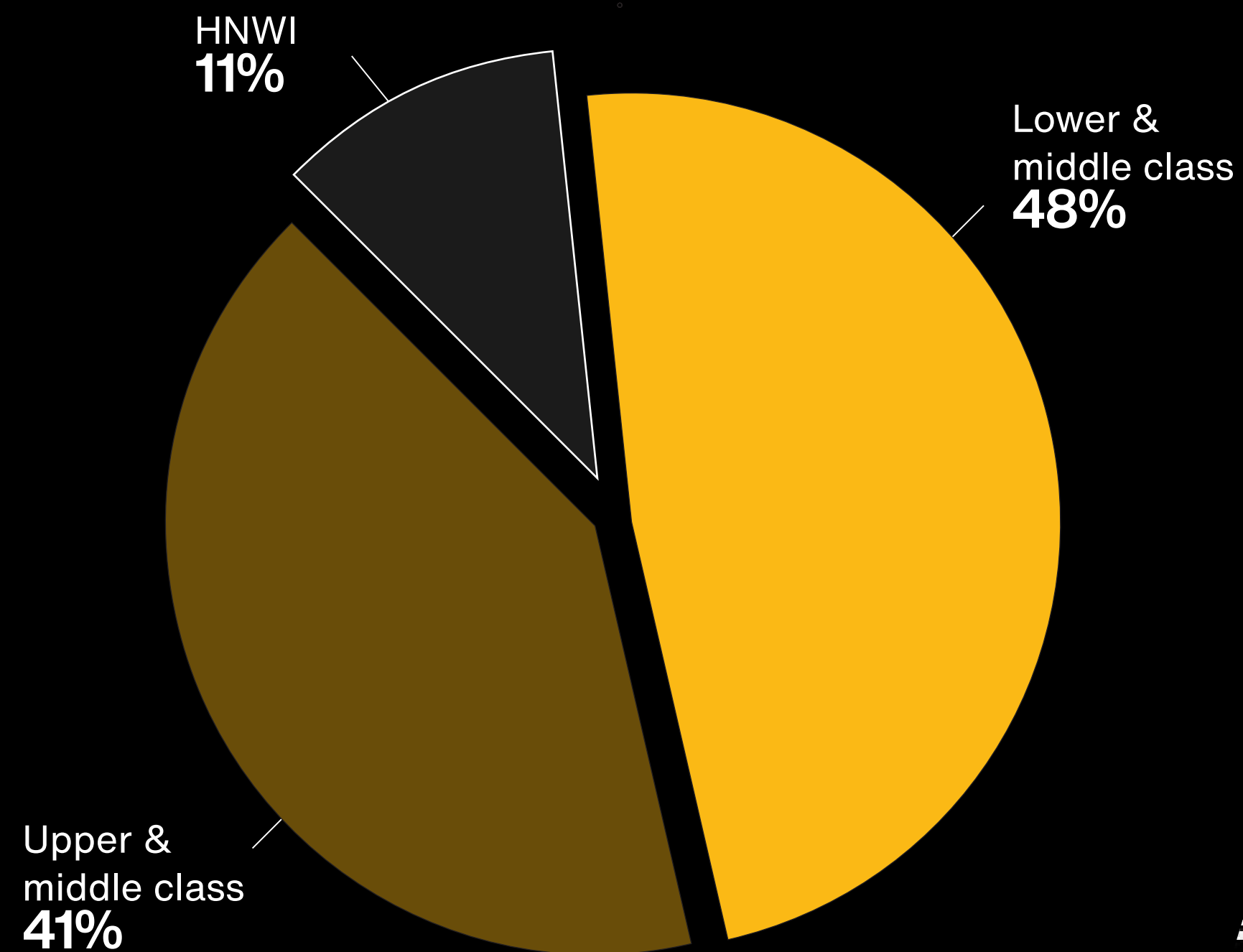
This substantial figure validates Germany's decision to add Berlin's techno scene to its national registry of **intangible cultural heritage**.

With over 2 million music tourists annually, Berlin demonstrates how underground authenticity can translate into **mainstream economic success**.



HOW IS THAT \$2.40 BILLION SPENT IN BERLIN?

Type of spenders attracted by nightlife (1,495,172 global Meta™ users)



Where they spend?

- Luxury resort experience buyers
- Resort experience buyers
- Gourmet experience buyers
- Destination experience buyers
- Champagne experience buyers

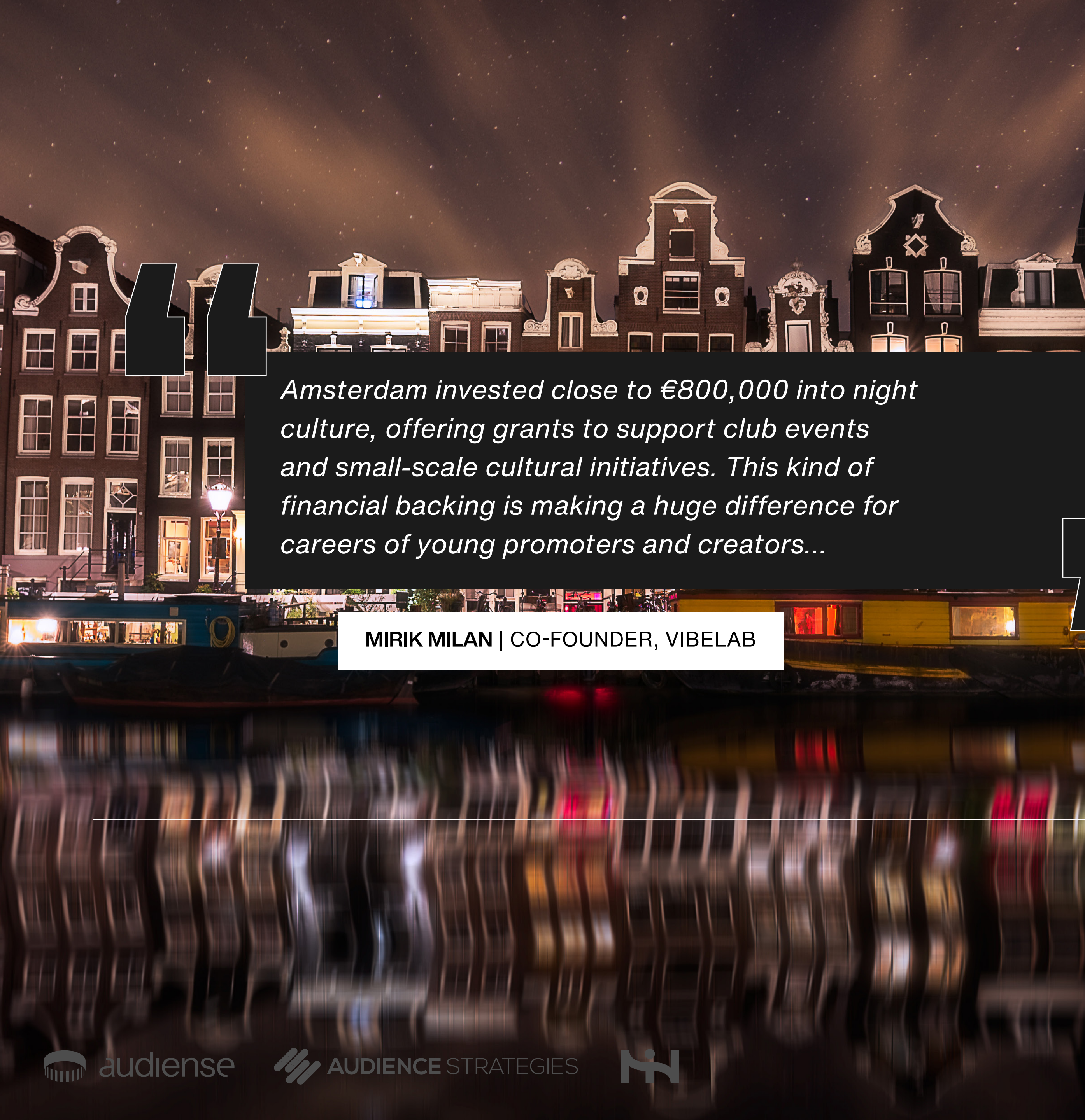


NIGHTLIFE

- Based on data from **1,495,172 global Meta users**, this analysis reveals that 48% of nightlife enthusiasts belong to the lower and middle class, followed by **41% in the upper middle class and 11% classified as high-net-worth individuals (HNWIs)**.
- For nightlife spenders, **the experience itself far outweighs the importance of destination or travel**.
This audience shows a strong preference for **luxury resort** stays and gourmet dining, while general resort experiences and destination-focused offerings generate minimal interest
- **21% of nightlife spenders** are drawn to **champagne** experiences, highlighting their preference for premium and celebratory drinks. **Cocktails** are also among **47%** of the audience's favorite picks.
- A considerable share of nightlife spenders (**70%**) are highly engaged in **sports and fitness**, opening the door for destinations to offer **wellness-oriented experiences** like **gyms, fitness retreats**, and **sporting events** to attract health-focused travelers.
- Finally, **40% of the audience show an interest in art exhibitions and designs, making them likely to be interested in art experiences, especially concerning contemporary art**.

PROGRESSIVE BY DESIGN AMSTERDAM





Amsterdam invested close to €800,000 into night culture, offering grants to support club events and small-scale cultural initiatives. This kind of financial backing is making a huge difference for careers of young promoters and creators...

MIRIK MILAN | CO-FOUNDER, VIBELAB



AMSTERDAM:

PROGRESSIVE BY DESIGN

SCALE & IMPACT

72 established venues

With 5+ RA followers and 10+ RA events in 2025

2,694 Active DJs

DJs with upcoming events on RA

1,861 events in 2024

On RA

**€1.25 billion annual
visitor spend**

MUSICAL IDENTITY

56% House Music

41% Techno
(highest among all cities)

22% Daytime events

4% Industrial/Trance heritage

Only 4 genres at >5% of events

Source: Analysis of all events in 2024 on RA

SCENE DYNAMICS

Progressive governance model

Balanced venue ecosystem

Strong support for new talent

31% venues 200-500 capacity

On RA. Amongst those with known capacity

5% large venues

(2,000+ capacity)

On RA. Amongst those with known capacity

Source: Based on Audiense Social & Digital Intelligence, analysis of 124 venues across eight global destinations using Resident Advisor venue & DJ data, 12 months of Google flight searches in seven countries, and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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AUDIENCE STRATEGIES



**19% Dutch audience
(lowest domestic %)**

Strong UK following (17%)

Significant US/European reach

**Sophisticated, culturally-aware
audience**

**High engagement with
sustainable initiatives**

AMSTERDAM AUDIENCE SNAPSHOT

Source: Audiense Social & Digital Intelligence



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AUDIENCE STRATEGIES



THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN AMSTERDAM

Amsterdam's electronic music scene delivers **substantial economic value** beyond cultural significance. Our analysis reveals a vibrant ecosystem with **far-reaching financial impact** on the city's economy.



THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN AMSTERDAM

SNAPSHOT →

72 established venues creating a diverse nightlife landscape

3,154 electronic music events identified across 2024

Over 6 million club attendances throughout the year

603,373 dedicated music tourists travelling specifically for electronic music experiences

AMSTERDAM

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN AMSTERDAM

ECONOMIC CONTRIBUTIONS

Amsterdam's electronic music sector generates an estimated \$844.7 million total economic impact, comprising:

\$241.3 million in direct and indirect nightclub impact

- Venue entry fees
- In-venue spending (primarily beverages)
- Preparation costs (clothing, personal care)
- Pre-venue dining and transport

\$603.4 million in additional tourist-related economic impact

- Transportation to Amsterdam
- Accommodation expenses
- Extended stays beyond club nights

COMPARATIVE POSITION

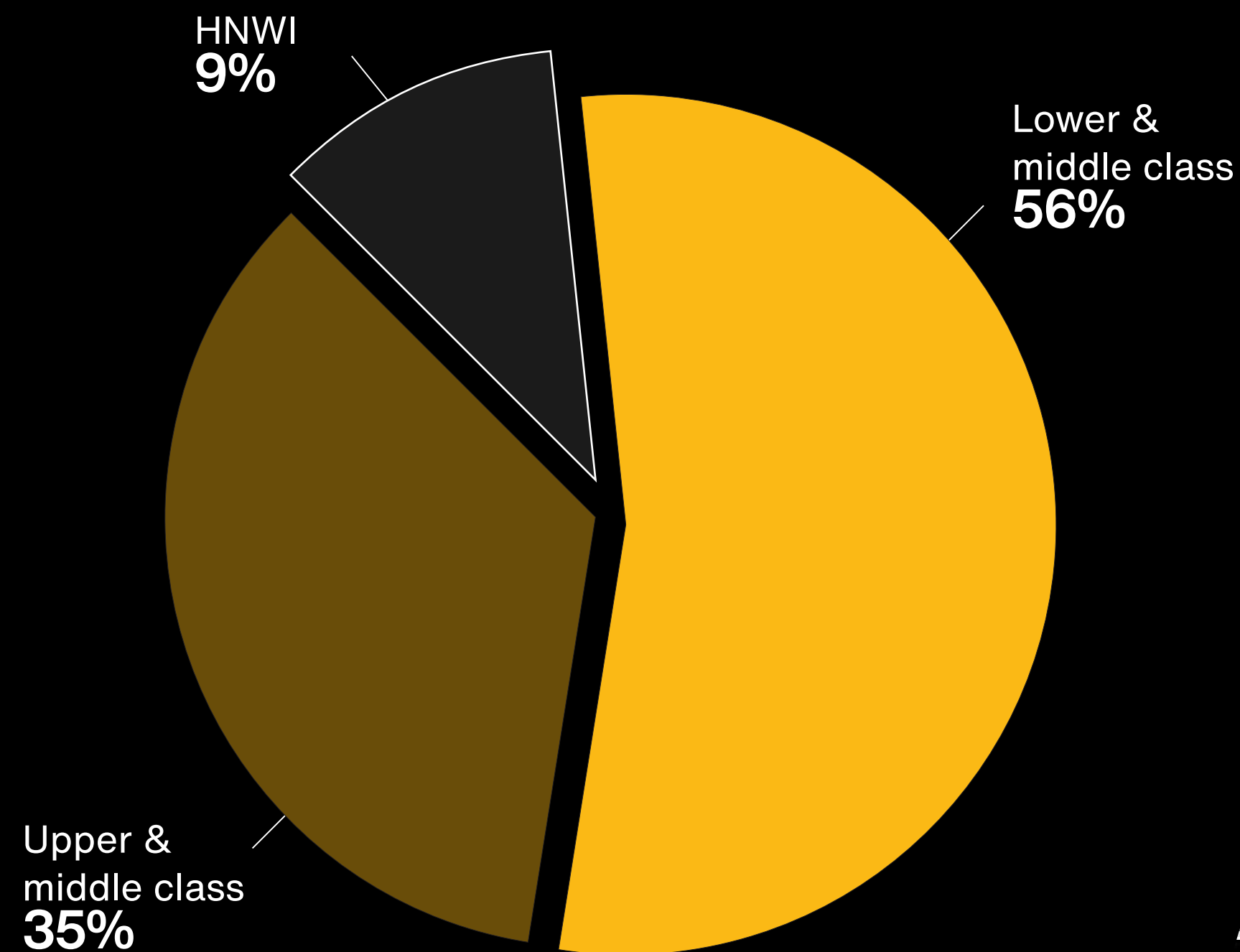
Amsterdam demonstrates **remarkable economic efficiency**, generating significant value despite having fewer venues than cities like Barcelona (88) or Berlin (131).

With approximately **10% of club attendees being dedicated music tourists**, the city shows strong appeal as a destination for electronic music enthusiasts.



HOW IS THAT \$844 MILLION SPENT IN AMSTERDAM?

Type of spenders attracted by nightlife (1,764,795 global Meta™ users)



Where they spend?

- Luxury resort experience buyers
- Resort experience buyers
- Gourmet experience buyers
- Destination experience buyers
- Champagne experience buyers



- Based on data from **1,764,795 global Meta users**, this analysis reveals that 56% of nightlife enthusiasts belong to the lower and middle class, followed by **35% in the upper middle class and 9% classified as high-net-worth individuals (HNWIs)**.
- For nightlife spenders, **the experience itself is the main priority**. This audience shows a strong preference for luxury resorts, gourmet dining, and seaside settings, while destination-focused experiences generate lower engagement.
- **23% of nightlife spenders** are drawn to **champagne** experiences, highlighting their preference for premium and celebratory drinks. **Cocktails** are also among **46%** of the audience's favorite picks.
- A notable share of nightlife spenders (**54%**) show a strong interest in **modern art** and **interior design (65%)**, creating an opportunity for destinations to offer curated experiences such as art installations, and exclusive exhibitions to attract aesthetically inclined travelers.
- Finally, **49% of the audience show a great interest in fashion design as well as fashion events**.

WHERE INTIMACY MEETS INTENSITY

BARCELONA



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AUDIENCE STRATEGIES



BARCELONA:

PROGRESSIVE BY DESIGN

SCALE & IMPACT

91 established venues

With 5+ RA followers and 10+ RA events in 2025

2,430 events in 2024

On RA

**80% venues under
500 capacity**

On RA. Amongst those with known capacity

3 Of World's Top 100 Clubs

DJ Mag

MUSICAL IDENTITY

56% House Music

31% Techno

12% Electronica

10% African-influenced genres

**Only 4% venues exceed 2,000
capacity**

Source: Analysis of all events in 2024 on RA

SCENE DYNAMICS

Strong domestic foundation

Pulse Analysis of 124 global venues

2,963 active DJs

DJs with upcoming events on RA

**Perfect balance of tourist and local
appeal**

Year-round programming capability

**Razzmatazz and Sala Apolo lead
rankings**

Pulse Analysis of 124 global venue

Source: Based on Audiense Social & Digital Intelligence, analysis of 124 venues across eight global destinations using Resident Advisor venue & DJ data, 12 months of Google flight searches in seven countries, and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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AUDIENCE STRATEGIES



A close-up photograph of a person wearing a black mask with large, expressive eyes and a beaded necklace with orange, black, and yellow beads. The person has a beard and is looking slightly to the side. The background is dark with some blue and red lighting.

39% Spanish audience

Strong European following

**“Electronic Music Ambassadors”
segment at 14%**

**Balance of international appeal with
regional roots**

BARCELONA AUDIENCE SNAPSHOT

Source: Audiense Social & Digital Intelligence

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN BARCELONA

Barcelona's electronic music scene blends seamlessly with the city's broader cultural appeal, creating **substantial economic value**. Our analysis reveals a thriving ecosystem with **significant financial contributions to the local economy**.



SNAPSHOT →

91 established venues offering diverse nightlife experiences

6,403 electronic music events identified across 2024

Over 12.2 million club attendances throughout the year

BARCELONA

920,935 dedicated music tourists travelling specifically for electronic music experiences

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN BARCELONA

ECONOMIC CONTRIBUTIONS

Barcelona's electronic music sector generates an estimated \$1.41 billion total economic impact, comprising:

\$491.2 million in direct and indirect nightclub impact

- Venue entry fees
- In-venue spending (primarily beverages)
- Preparation costs (clothing, personal care)
- Pre-venue dining and transport

\$920.9 million in additional tourist-related economic impact

- Transportation to Barcelona
- Accommodation expenses
- Extended stays beyond club nights

COMPARATIVE POSITION

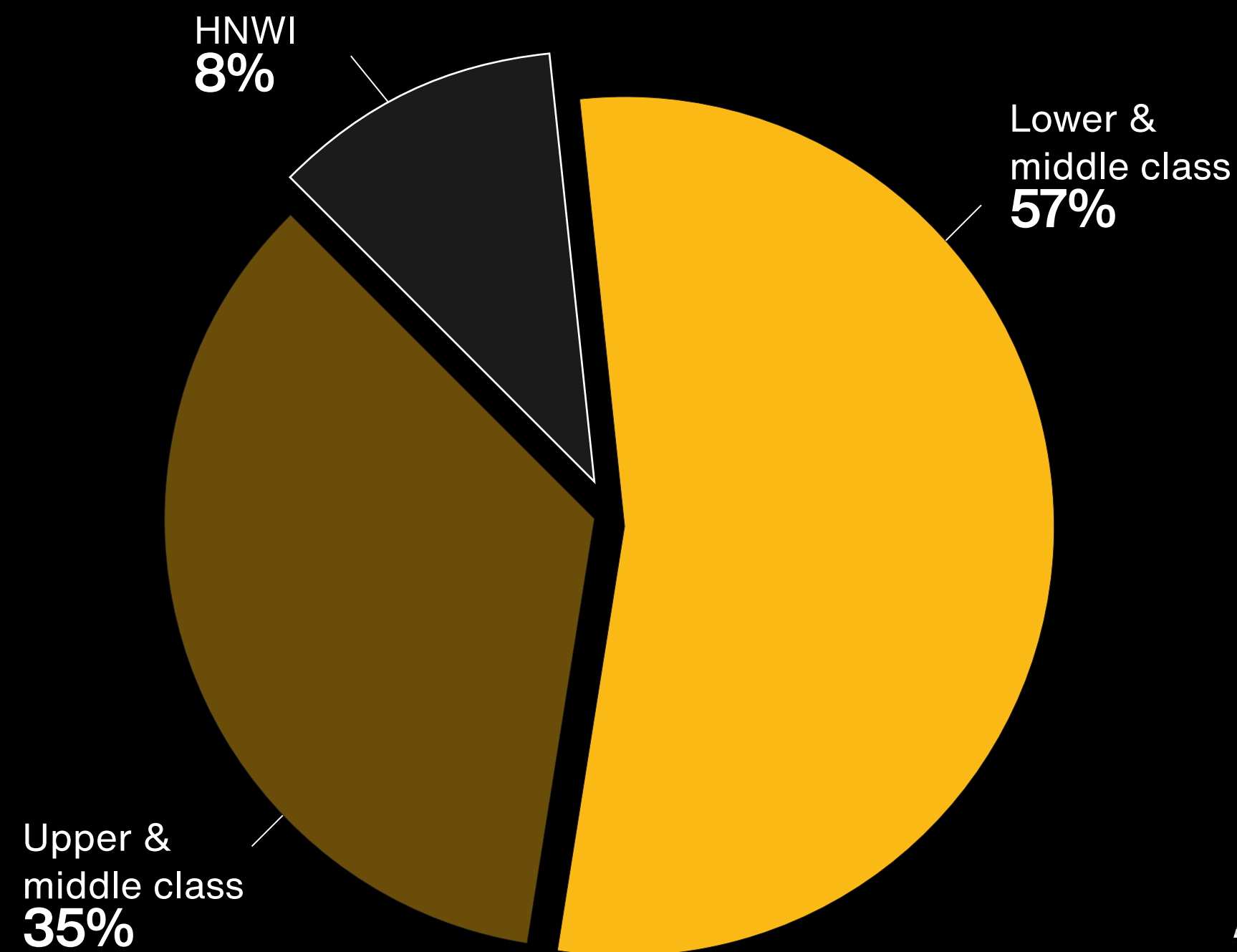
Barcelona demonstrates **impressive economic performance** with its unique integration of electronic music within broader cultural tourism.

The city's emphasis on **intimate venues** (80% under 500 capacity) creates distinctive experiences that attract nearly a million music tourists annually, proving that **focused, authentic offerings can deliver substantial economic returns.**



HOW IS THAT \$1.41 BILLION SPENT IN BARCELONA?

Type of spenders attracted by nightlife (2,499,222 global Meta™ users)



Where they spend?

- Luxury resort experience buyers
- Resort experience buyers
- Gourmet experience buyers
- Destination experience buyers
- Seaside experience buyers
- Champagne experience buyers



BARCELONA

- Based on data from **2,499,222 global Meta users**, this analysis reveals that 57% of nightlife enthusiasts belong to the lower and middle class, followed by **35% in the upper middle class and 8% classified as high-net-worth individuals (HNWIs)**.
- For nightlife spenders, the **overall experience is key**, with a strong interest in **luxury resorts, gourmet dining, and seaside offerings**. While destination-focused experiences are of moderate interest, the highest engagement is seen with upscale resorts and high-end culinary experiences.
- **22% of nightlife spenders** are drawn to **champagne** experiences, highlighting their preference for premium and celebratory drinks. However, **beer** remains the top choice for **50%** of the audience.
- A considerable segment of nightlife spenders (61%) have an interest in **auto racing**, offering a great opportunity for destinations like Barcelona to develop their racing-related events and experiences, drawing motorsport fans and adding an exciting dynamic to the city's offerings.
- Finally, **half of nightlife spenders have an interest for gastronomy (59%)**.

WHERE CONTINENTS CONVERGE

M A N A M



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AUDIENCE STRATEGIES





“

Miami has long been a destination for nightlife, thanks to its vibrant mix of Latin influences and its hosting of both mainstream festivals like Ultra and indie events like Ill Points...

KATIE BAIN | DIRECTOR OF BILLBOARD DANCE AND SENIOR MUSIC CORRESPONDENT AT BILLBOARD MAGAZINE

”



MIAMI:

PROGRESSIVE BY DESIGN

SCALE & IMPACT

26 established venues

With 5+ RA followers and 10+ RA events in 2025

842 events in 2024

On RA

Top 4 US venues located here

DJ Mag

899 active DJs

DJs with upcoming events on RA

MUSICAL IDENTITY

**73% House Music
(highest globally)**

27% Techno

10% African-influenced genres

5 genres at >5% of events

Focused musical identity

Source: Analysis of all events in 2024 on RA

SCENE DYNAMICS

**Equal distribution across
venue sizes: 45% of venues under 250
capacity, with even distribution across
mid-sized and large venues**

On RA. Amongst those with known capacity

**Strong Latin American
influence**

Pulse Analysis of 124 global venues

Key winter season destination

**Ultra Music Festival ranks 7th
in global demand**

Pulse Analysis of 124 global venues

Source: Based on Audiense Social & Digital Intelligence, analysis of 124 venues across eight global destinations using Resident Advisor venue & DJ data, 12 months of Google flight searches in seven countries, and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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AUDIENCE STRATEGIES



25% US audience

Strong Latin American following

**Peak activity during Miami
Music Week**

**Winter counter-programming
to Europe**

**Gateway between North and
South America**

MIAMI AUDIENCE SNAPSHOT

Source: Audiense Social & Digital Intelligence



THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN MIAMI

Miami's position as a bridge between North American and Latin American markets creates **meaningful economic impact**. Our analysis reveals a focused but valuable ecosystem with **significant contributions to the local economy**.



SNAPSHOT →

26 established venues creating a concentrated nightlife landscape

1,504 electronic music events identified across 2024

1.22 million club attendances throughout the year

183,498 dedicated music tourists travelling specifically for electronic music experiences

MIAMI

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN MIAMI

ECONOMIC CONTRIBUTIONS

Miami's electronic music sector generates an estimated \$354.8 million total economic impact, comprising:

\$97.9 million in direct and indirect nightclub impact

- Venue entry fees
- In-venue spending (primarily beverages)
- Preparation costs (clothing, personal care)
- Pre-venue dining and transport

\$256.9 million in additional tourist-related economic impact

- Transportation to Miami
- Accommodation expenses
- Extended stays beyond club nights

COMPARATIVE POSITION

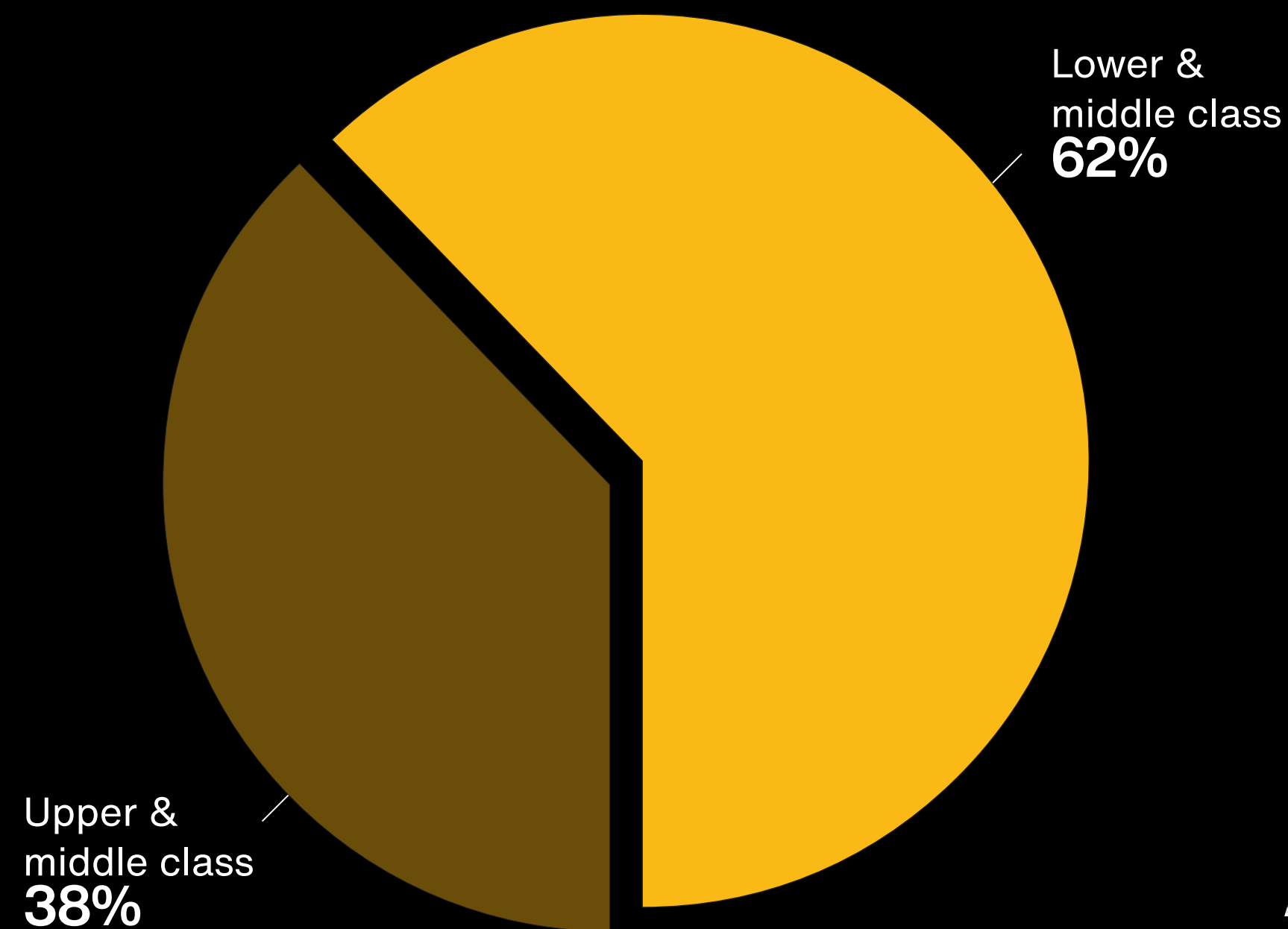
Miami generates substantial economic value despite having relatively few venues, demonstrating the **power of its strategic position as a gateway between markets.**

With events like Ultra Music Festival and Miami Music Week creating concentrated periods of high activity, **Miami shows how seasonal programming can drive significant economic returns**, particularly through tourist expenditure which accounts for over 72% of its total economic impact.



HOW IS THAT \$354.8 MILLION SPENT IN MIAMI?

Type of spenders attracted by nightlife (2,484,000 global Meta™ users)



Where they spend?

- Luxury resort experience buyers
- Resort experience buyers
- Gourmet experience buyers
- Destination experience buyers
- Seaside experience buyers
- Champagne experience buyers



MIAMI

- Based on data from **2,484,000 global Meta users**, this analysis reveals that 62% of nightlife enthusiasts belong to the middle-class and lower middle-class, followed by 38% in the upper middle class. **None of them can be considered high networth individuals.**
- For nightlife spenders in Miami, the **overall experience is key**, with a strong preference for **luxury resort stays, gourmet dining**, and **seaside** settings. While **destination-focused experiences attract moderate interest**, the highest engagement is seen with upscale resorts and high-end culinary offerings.
- Notably, **26% of nightlife spenders are associated with champagne experiences. However, cocktails (49%) remain a key preference for this group.**
- Additionally, **a great majority of nightlife spenders share an interest for cuisine and gastronomy (64%), making it a great opportunity to develop culinary tourism in the area.**
- Finally, **61%** also have a keen interest for **motorsports** and are looking to watch **auto racing events** and the likes around Miami.

LUXURY MEETS UNDERGROUND ENERGY

DEBATA



audience

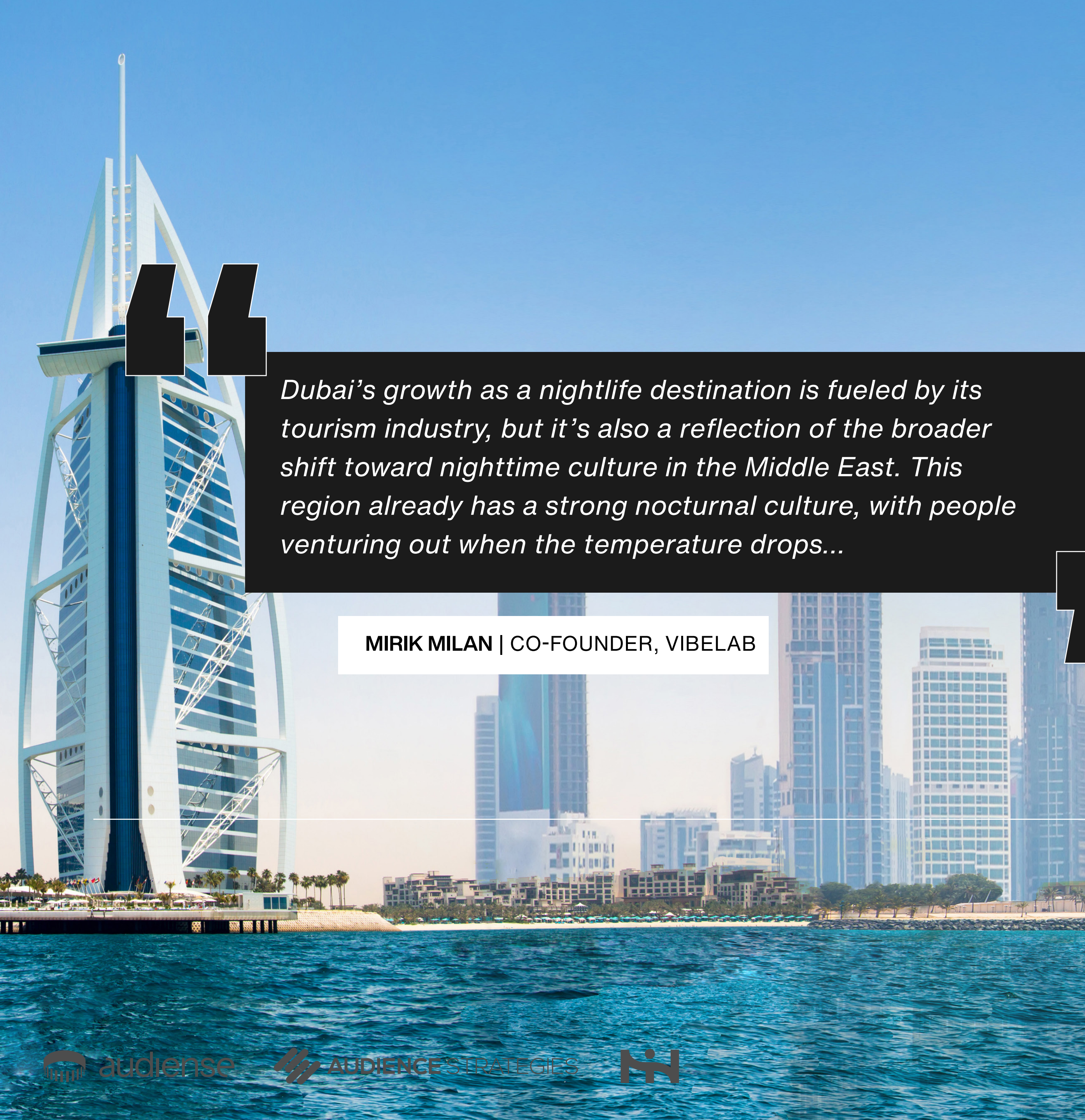


audience strategies



audience strategies

88th



“

Dubai's growth as a nightlife destination is fueled by its tourism industry, but it's also a reflection of the broader shift toward nighttime culture in the Middle East. This region already has a strong nocturnal culture, with people venturing out when the temperature drops...

”

MIRIK MILAN | CO-FOUNDER, VIBELAB



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AUDIENCE STRATEGIES



N

DUBAI:

LUXURY MEETS UNDERGROUND ENERGY

SCALE & IMPACT

10 established venues

With 5+ RA followers and 10+ RA events in 2025

186 active DJs

DJs with upcoming events on RA

268 events in 2024

On RA

33% venues exceed 2,000 capacity

On RA. Amongst those with known capacity

MUSICAL IDENTITY

68% House Music

37% Techno

15% African-influenced genres

7% Electronica

8% Electro

Source: Analysis of all events in 2024 on RA

SCENE DYNAMICS

Matches Ibiza for large venue share

On RA. Amongst those with known capacity

Strong domestic dominance

Pulse Analysis of 124 global venues

BLU Club Dubai leads UAE rankings

Pulse Analysis of 124 global venues

Emerging underground scene

Focus on premium experiences

Ushuaïa Dubai Harbour Experience

launched October 2024

TNL's first major venture outside Europe

Season 1 drew 90,000+ attendees

Season 2 opened October 2025

Source: Based on Audiense Social & Digital Intelligence, analysis of 124 venues across eight global destinations using Resident Advisor venue & DJ data, 12 months of Google flight searches in seven countries, and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



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AUDIENCE STRATEGIES





37% UAE audience

8% each from UK

Saudi Arabia, US

High-value tourism focus

Regional entertainment hub

Growing international credibility

DUBAI AUDIENCE SNAPSHOT

Source: Audiense Social & Digital Intelligence



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AUDIENCE STRATEGIES



THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN DUBAI

Dubai's emerging electronic music scene reflects its position as **a luxury tourism hub** while delivering **growing economic value**. Our analysis reveals a compact but impactful ecosystem with **promising financial contributions**.



SNAPSHOT →

10 established venues creating a focused nightlife landscape

337 electronic music events identified across 2024

431,165 club attendances throughout the year

70,064 dedicated music tourists travelling specifically for electronic music experiences

DUBAI

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN DUBAI

ECONOMIC CONTRIBUTIONS

Dubai's electronic music sector generates an estimated \$196.7 million total economic impact, comprising:

\$77.6 million in direct and indirect nightclub impact

- Venue entry fees
- In-venue spending (primarily beverages)
- Preparation costs (clothing, personal care)
- Pre-venue dining and transport

\$119.1 million in additional tourist-related economic impact

- Transportation to Dubai
- Accommodation expenses
- Extended stays beyond club nights

COMPARATIVE POSITION

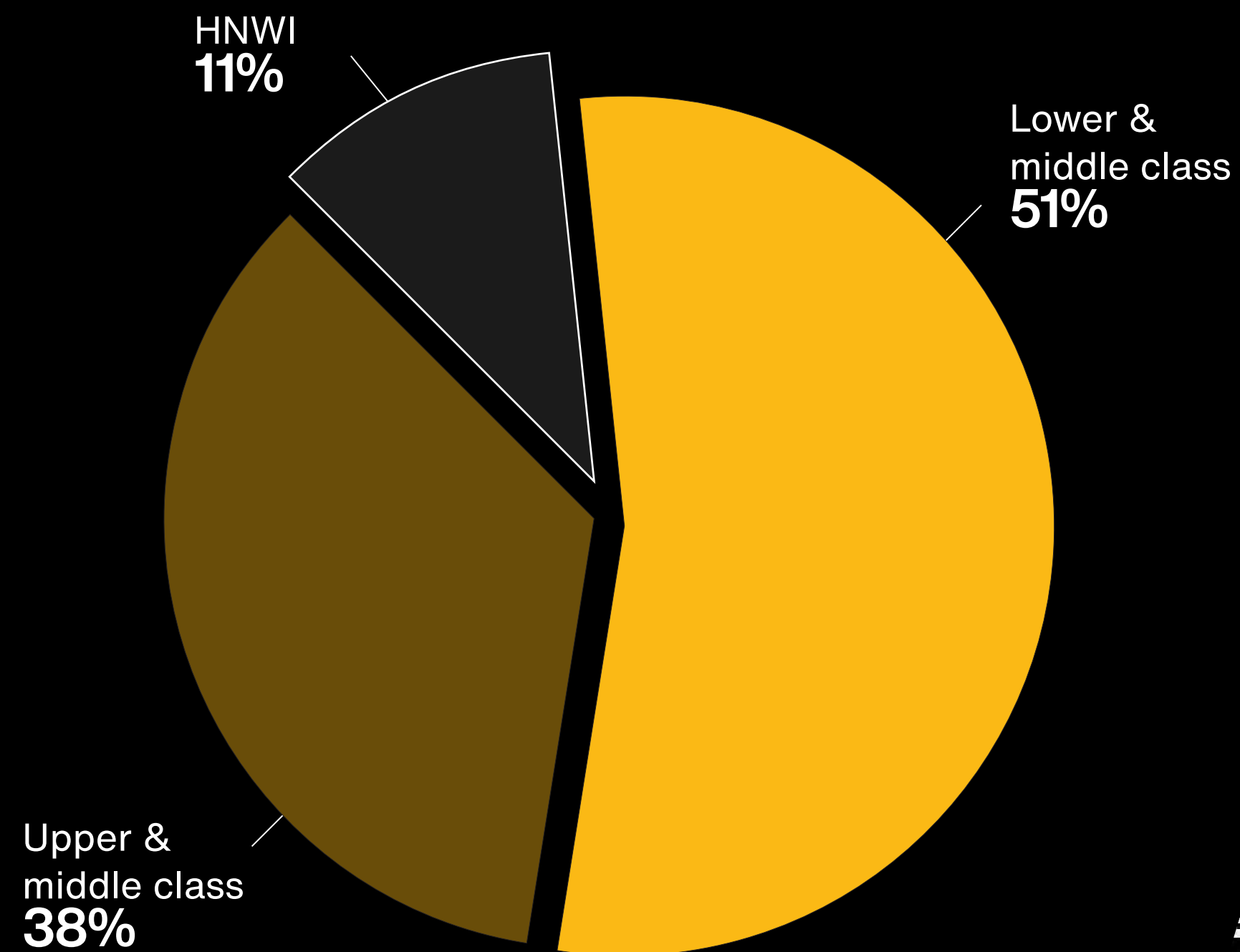
Despite having the fewest venues among studied cities alongside Tulum, **Dubai generates impressive economic value**, demonstrating the success of its luxury-focused approach.

With **high-spending visitors and premium offerings**, Dubai shows how quality can outweigh quantity in the electronic music tourism sector. Ushuaïa Dubai Harbour Experience—launched October 2024 with Calvin Harris headlining to 15,000+—drew over 90,000 attendees in its debut season. Season 2 opened October 2025 with Anyma's Quantum show, establishing Dubai as TNL's **winter counterpart to Ibiza's summer programming**.



HOW IS THAT \$196.7 MILLION SPENT IN DUBAI?

Type of spenders attracted by nightlife (4,635,205 global Meta™ users)



Where they spend?

- Luxury resort experience buyers
- Resort experience buyers
- Gourmet experience buyers
- Destination experience buyers
- Seaside experience buyers
- Champagne experience buyers



- Based on data from **4,635,205 global Meta users**, this analysis reveals that 51% of nightlife enthusiasts belong to the lower and middle class, followed by **38% in the upper middle class and 11% classified as high-net-worth individuals (HNWIs)**.
- For nightlife spenders, the overall **experience** takes precedence over the **destination** itself. This audience shows a strong preference for **luxury resorts, gourmet dining, and seaside experiences**, while destination-based offerings receive less interest.
- Notably, **24% of nightlife spenders are associated with champagne experiences**, underscoring their strong affinity for premium and celebratory purchases. **However, cocktail remains the number one pick for 41% of the audience.**
- A significant portion of nightlife spenders express an interest in the **arts (61%)**, presenting a valuable opportunity for destinations to develop cultural experiences such as **galleries, exhibitions**, and **artist** collaborations to attract art-focused travelers.
- Finally, **half of nightlife spenders have an interest in fashion and makeup, making it an opportunity to develop the fashion industry in the area.**

ELECTRONIC MUSIC'S ECO-LUXE FRONTIER

TUUM

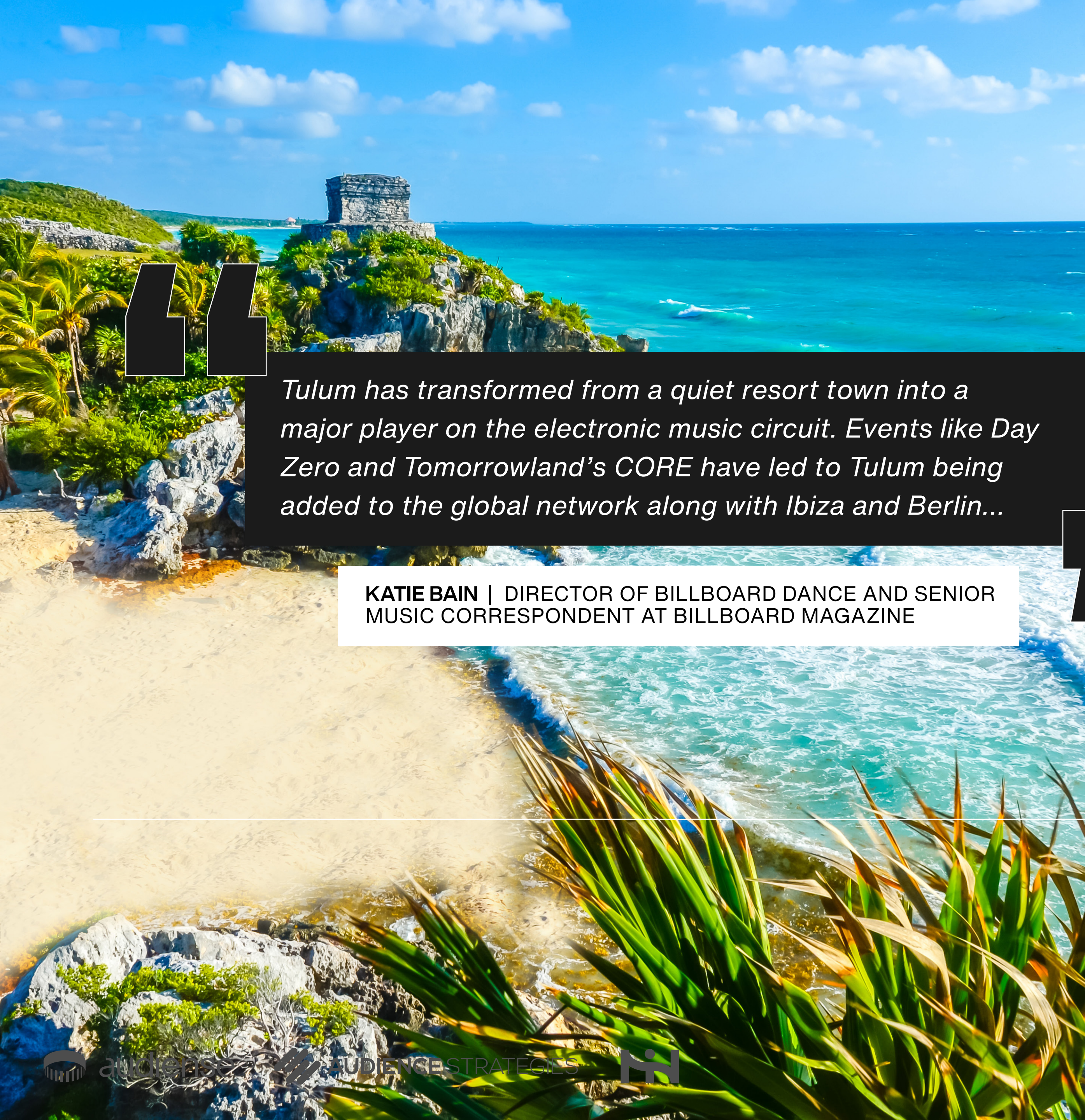


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AUDIENCE STRATEGIES





“

Tulum has transformed from a quiet resort town into a major player on the electronic music circuit. Events like Day Zero and Tomorrowland’s CORE have led to Tulum being added to the global network along with Ibiza and Berlin...

KATIE BAIN | DIRECTOR OF BILLBOARD DANCE AND SENIOR MUSIC CORRESPONDENT AT BILLBOARD MAGAZINE

”



TULUM:

PROGRESSIVE BY DESIGN

SCALE & IMPACT

5 Established Venues

With 5+ Ra Followers And 10+ Ra Events In 2025

152 Events In 2024

On Ra

Peak Season:

December-April

On Ra. Amongst Those With Known Capacity

MUSICAL IDENTITY

**77% House Music
(highest globally)**

50% Techno

28% African-influenced genres

8% Electronica

Most focused musical programming

Source: Analysis of all events in 2024 on RA

SCENE DYNAMICS

**Nature-integrated venue
experiences**

Boutique capacity focus

On RA. Amongst those with known capacity

Strong domestic scene leadership

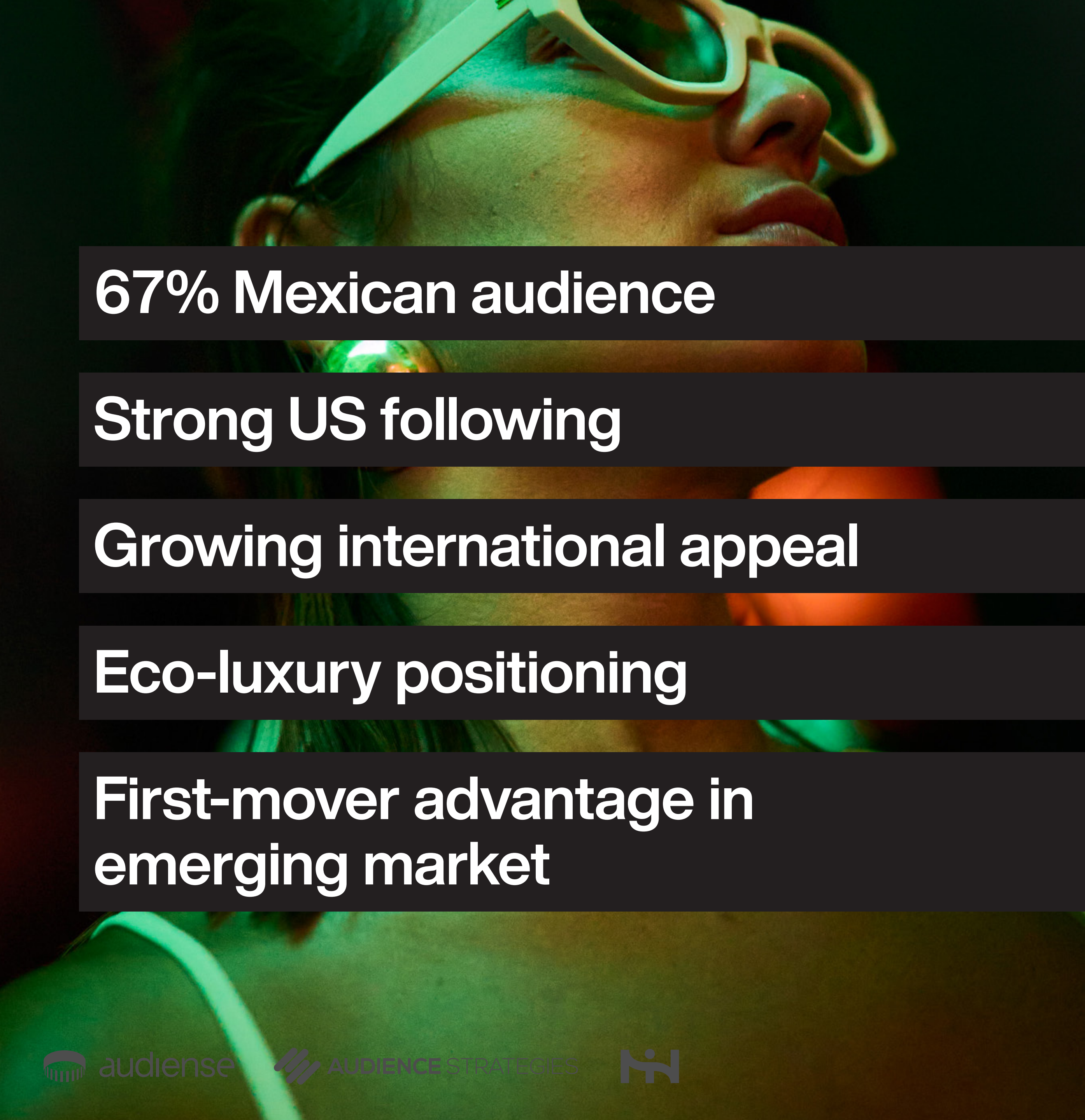
Pulse Analysis of 124 global venues

**Papaya Playa Project
ranks in US top 10**

Pulse Analysis of 124 global venues

Growing international recognition

Source: Based on Audiense Social & Digital Intelligence, analysis of 124 venues across eight global destinations using Resident Advisor venue & DJ data, 12 months of Google flight searches in seven countries, and in-depth interviews with industry leaders, conducted by Audience Strategies for Audiense, 2025.



67% Mexican audience

Strong US following

Growing international appeal

Eco-luxury positioning

**First-mover advantage in
emerging market**

TULUM AUDIENCE SNAPSHOT

Source: Audiense Social & Digital Intelligence



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AUDIENSE STRATEGIES



THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN TULUM

Tulum's emerging electronic music scene blends **natural beauty with cultural experiences**, creating growing economic value. Our analysis reveals a nascent but **promising ecosystem** with **potential for further development**.



THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN TULUM

SNAPSHOT →

5 established venues creating an intimate nightlife landscape

155 electronic music events identified across 2024

92,760 club attendances throughout the year

20,871 dedicated music tourists travelling specifically for electronic music experiences

TULUM

THE ECONOMIC IMPACT OF ELECTRONIC MUSIC NIGHTCLUBS IN TULUM

ECONOMIC CONTRIBUTIONS

Tulum's electronic music sector generates an estimated \$32.7 million total economic impact, comprising:

\$5.6 million in direct and indirect nightclub impact

- Venue entry fees
- In-venue spending (primarily beverages)
- Preparation costs (clothing, personal care)
- Pre-venue dining and transport

\$27.1 million in additional tourist-related economic impact

- Transportation to Tulum
- Accommodation expenses
- Extended stays beyond club nights

COMPARATIVE POSITION

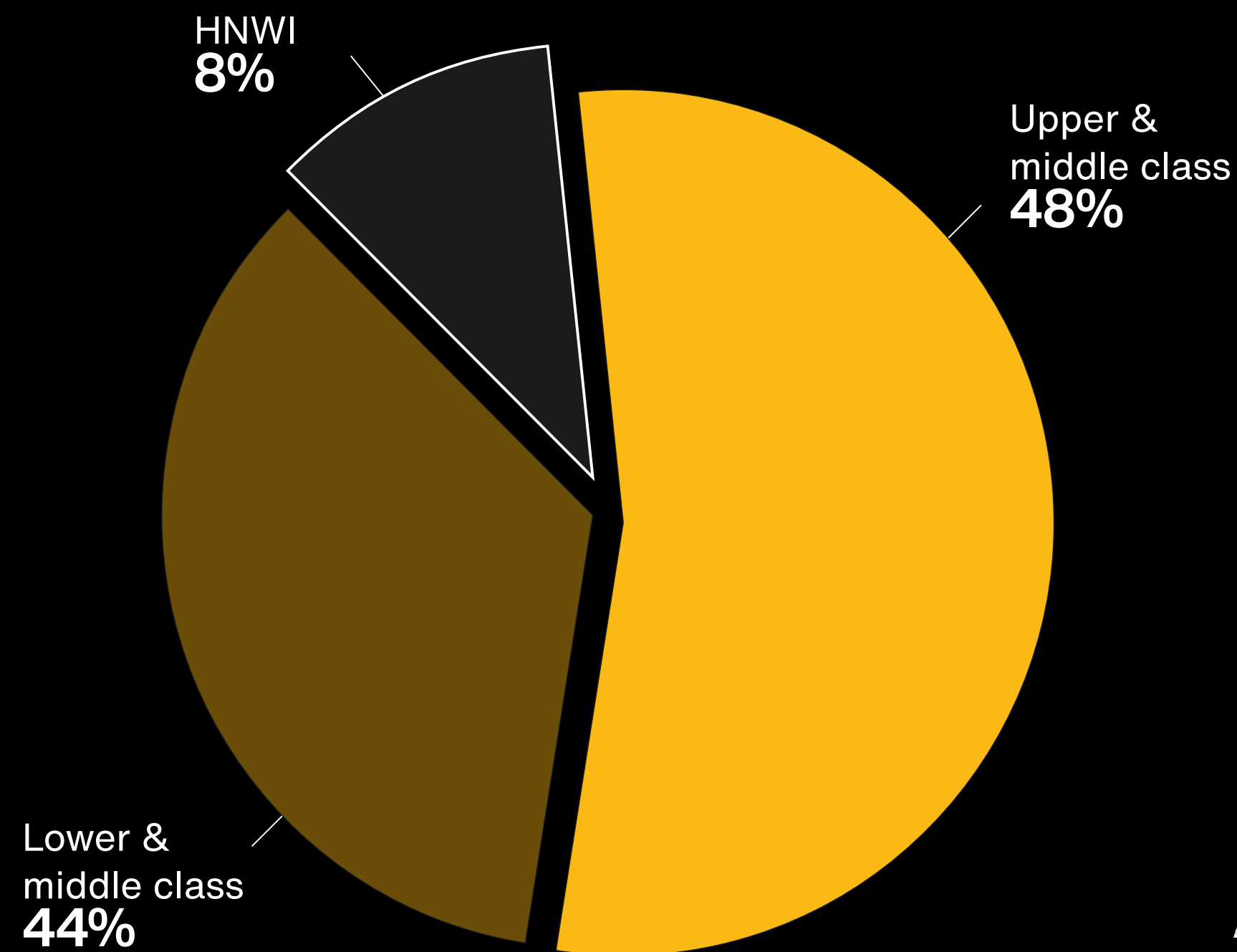
While generating the smallest economic impact among studied destinations, Tulum shows **promising potential with over 83% of its economic value coming from tourist expenditure**—the highest proportion among all cities.

This reflects Tulum's distinctive positioning as an eco-luxury destination that attracts **high-value visitors** seeking unique experiences. As this market develops, **Tulum's economic impact is likely to grow substantially.**



HOW IS THAT \$32.7 MILLION SPENT IN TULUM?

Type of spenders attracted by nightlife (2,484,000 global Meta™ users)



Where they spend?

- Luxury resort experience buyers
- Resort experience buyers
- Gourmet experience buyers
- Destination experience buyers
- Seaside experience buyers
- Champagne experience buyers



MULTI

- Based on data from **2,484,000 global Meta users**, this analysis reveals that 44% of nightlife enthusiasts belong to the lower and middle class, followed by **48% in the upper middle class and 8% classified as high-net-worth individuals (HNWIs)**.
- Nightlife spenders seek a **well-rounded, high-end experience** where both the **resorts** and the **destination** matter. They do not show preference for any type of experience and instead engage with all of them, from gourmet dining to seaside setting as well as destination driven experiences.
- Notably, **24% of nightlife spenders are associated with champagne experiences**, underscoring their strong affinity for premium and celebratory purchases. **Meanwhile, beer remains a key preference for 53% of this group.**
- With **59%** of nightlife spenders drawn to **beaches** and **58% for natural environments**, there is a clear opportunity for the hospitality and tourism industries to create more immersive and upscale **nature-focused experiences** that blend nightlife with **scenic coastal settings**.
- Finally, **57% of nightlife spenders show a strong interest in spa.**

POWERED BY AUDIENSE

TRANSFORMING DATA INTO ACTIONABLE INSIGHTS

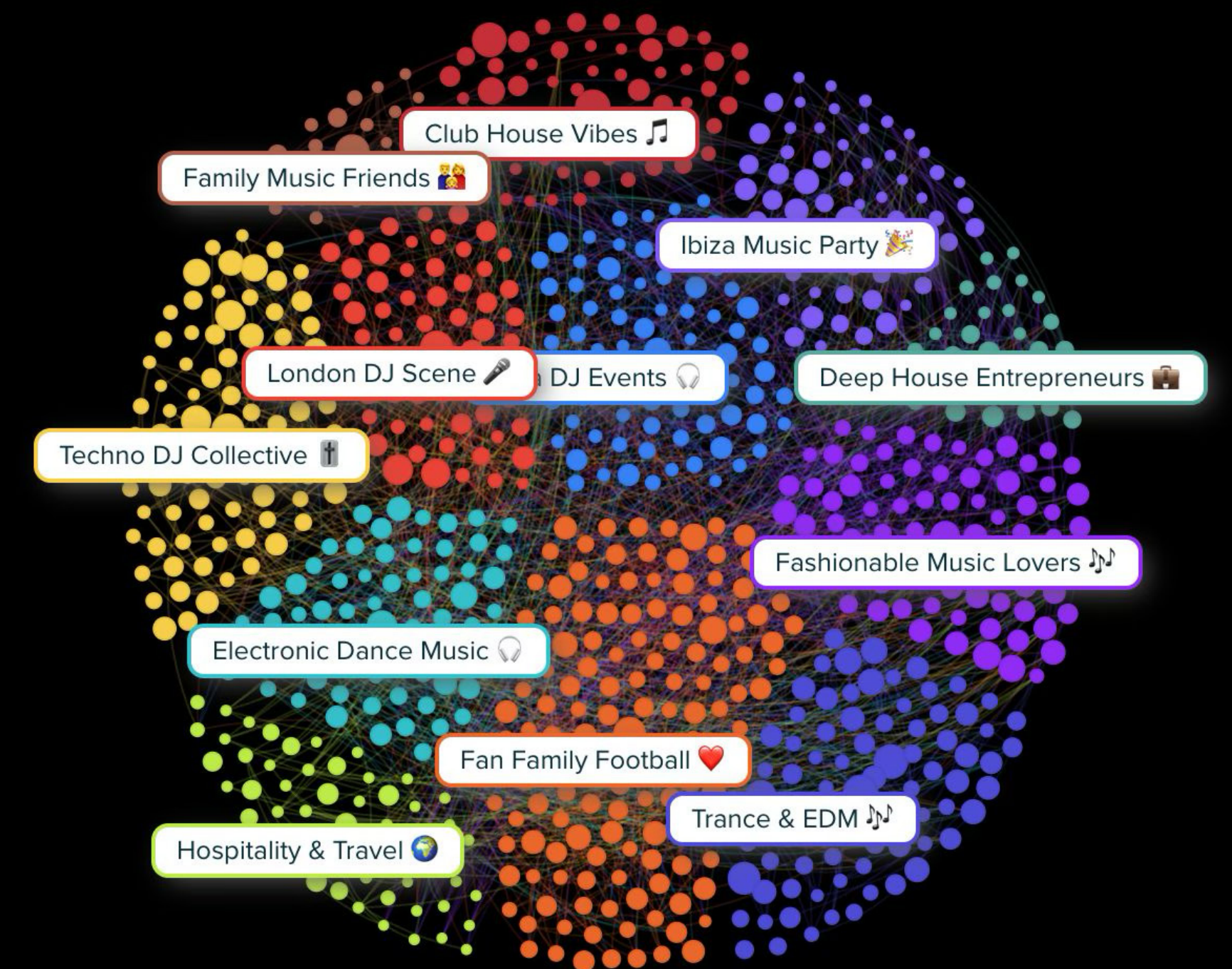
Audiense helped to surface and analyse the audiences of 124 venues across 8 global capitals, unearthing the insights used throughout this presentation.

- Segmented audiences and identified distinct demographic patterns and interest clusters among followers of leading music venues and DJ's
- Discovered emerging trends among those audiences

EXPERIENCE AUDIENSE



- Segment and/or analyse any audience on X, Meta, Instagram, YouTube, TikTok, Google Search, URL data, or segment and analyse your own First-Party data
- Surface audience interests, behaviours, media and content affinities, influencer, psychographic and demographic insights
- Surface audience personas, personality insights, and topics that define each audience
- Connect or compliment your current tech stack



Get in touch: luke.white@audiense.com

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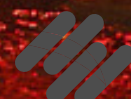
Utilising multiple data sources, ensuring we have the most holistic view of the industry possible our next step saw us focus on the audience through Digital Intelligence, the largest panel available of 3 Billion users. This quick qualification process provides us thorough confidence in all data sources and signals

GREGORY PIET | HEAD OF SOLUTIONS FOR AUDIENSE

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AUDIENCE STRATEGIES



WANT MORE?

Request more of the details, stats and analysis behind
Electronic Excursions 2025 from david@audiencestrategies.com

- 50+ pages of analysis, with in-depth breakdowns for each destination, venue size, genre composition, demographic segmentation and more
- Eight key city case studies (Ibiza, Barcelona, London, Berlin, Miami, Amsterdam, Dubai, Tulum), each covering demand metrics, audience dynamics, tourism flows, and venue infrastructure
- Analysis of 124 nightclubs and festivals using multiple demand signals (search volumes, social metrics, traffic)
- Tangible recommendations on climate adaptation, remote work trends, musical cross-pollination, authenticity and sustainability
- A comprehensive resource for venues, brands, policymakers, and anyone seeking deeper understanding of electronic music tourism's global scope



BY AUDIENCE STRATEGIES

WHERE DATA MEETS CREATIVITY



OUR APPROACH:

ESTABLISHED MODEL

- Data-driven audience understanding
- Strategic brand development
- Forward-thinking methodology
- Technology-enabled insights
- Research-backed solutions



CORE SERVICES:

EMERGING TRENDS

- Strategy development
- Audience identification
- Brand positioning
- Partner Selection
- Data-driven storytelling



PROJECT FOCUS:

HÍ IBIZA VIP EXPERIENCE

- Audience segmentation
- Sustainable growth strategies
- Deep market understanding
- Innovation

The International Nightlife Association (INA) is the global organization representing the nightlife sector worldwide. Founded in 2012 and headquartered in Girona (Spain), INA brings together leading nightlife associations, venues, entrepreneurs and industry stakeholders across five continents.

INA works to strengthen institutional recognition of the night time economy as essential urban infrastructure and to promote structured governance models at local, national and international levels.

Through its international network, INA develops strategic initiatives focused on:

- Global coordination and sector representation
- Safety standards and fire prevention frameworks
- Sustainability and environmental responsibility
- Quality management and operational excellence
- Regulatory dialogue with public authorities

Among its flagship initiatives are:

- The World's 100 Best Clubs™ annual global list
- The Golden Moon Awards
- The Gold Member Distinction
- The Triple Excellence in Nightlife Distinction (INSC, INAQ, INQS)
- The International Nightlife Congress

INA actively collaborates with governments, night mayors, city commissions and industry leaders to foster responsible growth, innovation and global best practices within the nightlife ecosystem.

Because nightlife is not marginal, it is economic, cultural and social infrastructure.

<http://www.nightlifeinternational.org>

THANK YOU

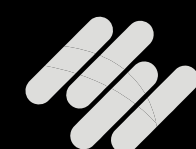
ELECTRONIC EXCURSIONS

An Insider's Guide To Club Culture Capitals

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