

MUSIC

**A Snapshot of Sheffield's Music Sector
– Summer 2015**

Music City

This report is the first of a three-part series commissioned to highlight Sheffield's huge wealth of creative talent. Sheffield is a city of makers, its creativity reflected in the input from both universities, the range of festivals in the city and its spirit of independence. With an emphasis on the areas of most potential growth, these three commissioned reports cover music, art and the beer industry, all of which cross over and link creatively between each distinct sector.

With music one of Sheffield's strongest identifiers, this report provides for the first time a snapshot of Sheffield's music sector. Compiled by the team at Sensoria from surveys, one-to-one interviews, desk research and industry data, it begins to ask how we can bring current talent from under the radar and enable growth in a time of harsh economic realities, establish our talent on a world stage and pave the way for the next generation of musicians.

As we start to plan the Year of Making in 2016, this is the time to stand up, publish our findings and start with music for, as one interviewee states, the challenge is to "get known outside the city" – this report is the start of that process.

Professor Vanessa Toulmin, Director of City & Cultural Engagement, University of Sheffield.

This unique survey serves as a snapshot of Sheffield's music sector in 2015; it aims to get a sense of the scale of the sector and its activities, it provides a benchmark for future years and for comparison with other music cities and it also signposts potential areas for further research to find out more about what music means for our city.


We gathered data on the following elements of the music sector:

- Bands, musicians and composers
- Managers/management companies
- Recording studios
- Rehearsal facilities
- Promoters
- Festivals
- Venues
- Journalists and listings offers
- Online and digital infrastructure, website
- Agents and bookers
- PR, pluggers, sync agents and other music industry services
- Courses and education facilities

Headline statistics include:

- Number of artists/practitioners/businesses in the South Yorkshire region.
- Estimate of levels of employment/numbers engaged in the music sector.
- Social media reach.





Our audit set out to ascertain the current scope of the music sector within the **South Yorkshire** region and, through one-to-one interviews and an online survey, identify the main challenges that the sector is currently facing.



Key Findings:

There are 465 active bands/artists and 323 organisations across the music sector in South Yorkshire from studios to rehearsal facilities, venues, festivals, managers and pluggers.

- Bands/musicians: **465**
- Recording Studios: There are **65** recording studios – ranging from fully specified project studios to well established facilities regularly producing major release recordings.
- Venues: **69** venues include dedicated music venues, bars that regularly present music, miscellaneous venues that host music events and a few are nightclubs that present live music.
- Rehearsal Facilities: **21** rehearsal facilities offering in excess of **70** rehearsal rooms
- **24** Record Labels
- **20** Sound Engineers (live)
- **11** Producers
- **32** Promoters
- **12** Managers, management companies and **3** Tour managers
- **21** Specialist music journalists and listings services
- **7** Agents & Bookers
- **5** PR and Pluggers
- **17** music festivals
- **10** music educational organisations
- **6** Sync Agents and other music industry services

Our Approach

For the purpose of this audit we defined the **Sheffield Music Sector** as including anyone involved in performing, creating, producing, recording, promoting and teaching music in the **South Yorkshire** region.

Parameters of the Research

We have made proposals for several areas of future research including exploring music education provision, the classical music sector and public engagement with music, especially live music. We have made some inroads into some of these areas but feel they deserve further attention. This snapshot is the initial step towards a bigger picture of what music means for the city.

Desk-based research included data gathering through online research, music sector reports including *The Mastering of a Music City* (Amy Terrill, Music Canada 2015) and *The Cultural Value of Live Music From the Pub to the Stadium: Getting Beyond the Numbers*. (Dr. Adam Behr, Dr. Matt Brennan & Professor Martin Cloonan 2014). We also devised an online survey that resulted in very informative, relevant primary data, both quantitative and qualitative.

Qualitative Research

We conducted one-to-one interviews to assist with data gathering and gain more in-depth insight from a cross-section of Sheffield's music community. Please note that survey comments are verbatim.



WHAT MAKES A MUSIC CITY?

In a very timely fashion recent reports and debates have discussed what makes a music city.

In June 2015 Music Canada launched their report *The Mastering of a Music City*. Through researching many cities across the world, Music Canada identified a basic framework of elements that apply to 'music cities'. We have applied the data gathered to aspects of this template and created a SWOT analysis of the sector.

Of course there is no strict definition of a music city – Sheffield has its strengths and weaknesses but anyone in regular contact with music in the city knows there is a wealth of musical talent in Sheffield and that fact remains as true today as ever.

The Mastering of a Music City identifies certain elements in common:

1. Artists and Musicians
2. Access to spaces and places
3. A receptive and engaged audience
4. Record labels and other music related businesses
5. A thriving music scene

Other factors mentioned in the report include

- a) Music education
- b) Multi level government support
- c) Broader city infrastructure

And the following factors are also often found:

Music history and identity, music tourism, recognition of music as an economic driver, strong community radio supporting local indie music, distinct local sound or sounds.

We have made reference to the points 1 – 5 and a – c.

We feel that the city would also benefit from further research into the 'other factors' and particularly music tourism.



552,698

The population of Sheffield according to the 2011 Census.

227,800

Aged 16 – 74 in full time employment.

1105

Employed full time in the sector and 3,564 part time (5,031 if individual musicians are included). Current estimate.

788

Active organisations/units across the music sector in South Yorkshire from studios to rehearsal facilities, venues, festivals managers, pluggers, bands and artists.

There is a wealth of musical talent and that fact remains as true today as ever



1. Artists and Musicians

From our research we collated a list of **465 active bands in the Sheffield City Region. Out of this figure:**

- **66%** operate locally
- **22%** nationally
- **4%** internationally (i.e. regular tours abroad, international reach, possibly Europe or other specific niche markets)
- **8%** worldwide (i.e. global brands or worldwide touring and reach)

By 'operate' we mean a band/artist that is either touring or selling products in that area.

The 465 bands comprise of 1,467 musicians. There are 1,155 registered members of PRS for Music for this region [PRS for Music is a collecting society acting on behalf of a membership of songwriters, composers and music publishers].

The national membership for PRS for Music exceeds 111,000 and includes rock and pop writers, classical composers, TV and film score composers, library music creators and music publishers. In 2014 the total income in royalties for the S postcode was £356,000 from domestic sources and £514,000 from overseas. This income accounts for royalties from live performances, broadcast (e.g. TV, radio, online) and recorded media.

To give this some context, total PRS income in 2014 was £664.3m. In effect the South Yorkshire Region represents 1% of the membership but accounts for 0.13% of the income. The general trend for income in the city region has been one of reasonably consistent growth since 2011 apart from in 2014 (2010 – 2011 saw a drop). Both membership and income for the region are relatively low (especially given that PRS membership for the region will include musicians who are no longer active but will still receive royalties).

With 465 known bands/artists in Sheffield there is a great deal of potential to generate further income from these revenue streams and for economic growth in the sector generally. There is certainly potential for the sector to 'professionalise' and enable a career for those interested in pursuing this.



"Sheffield has always felt very supportive towards musicians."

I have been writing and recording music for 17 years. I enjoy performing and Sheffield's Boardwalk and later on Greystone's venues have provided a platform for this. My real passion is writing and recording music.

I have always used the same studio in Sheffield and it has provided me with a fairly affordable way of recording and producing my music to a professional standard. Your survey asks about live music and income. I have made much more money through having the music I have recorded here in Sheffield used on TV programs, such as Channel 4's Hollyoaks and Sky Sports. In addition to this, there is indirect revenue that many songwriters who perform live are sadly unaware of, which is royalty collections through the PRS society.

It adds up if you do perform live, especially for musicians who manage to get some festival dates over the summer. Although your initial fee may not be great, you are entitled to claim for PRS royalties for each gig, which I do."

Musician's survey comment

Our survey asked musicians /bands to describe their involvement in the music industry:

56%

Part time

24%

Spare time / hobbyist

20%

Full time

A CITY OF DIY DO-ERS. Hobbyist vs Professional

It is clear that there are many music makers in the city – driven to create new works. We have made some effort to distinguish how many of our makers simply create for the love of it and have no desire to take any further steps, and how many have pursued their passion professionally and can make a living out of it.

It is apparent that very few make a living from music purely by playing. We have identified a high degree of overlap across roles in the music sector – many musicians are also engineers/producers/teachers/promoters or are involved in DIY labels. 61% of respondents from our recording studio and rehearsal facility survey stated they also worked in other areas of the music industry.

Alan Smyth (studio owner, producer, sound engineer and musician) was very positive about the amount of talented bands but felt that there aren't enough experienced or qualified A&R/management representatives to take potential bands to the next level.

Paul Tuffs (sound engineer, studio and rehearsal space owner) "The student bands that I've dealt with, don't see music as a career option. The demographic of student audiences has also changed."

The survey tried to establish how many part time/'amateur' musicians would be interested in pursuing music full time. Over 83% of the respondents stated 'yes' they would like to be a full time musician. Just over 1% stated they were happy making music in their spare time and almost 6% stated they were happy being part time.

Matt Howden (musician, tutor, Red Tape) found the type of student is split 50/50 between those seeking a career in music and those seeing it as a lifestyle choice. "A large percentage of our students go on to higher education (including University) and see their time at Red Tape almost as a 'musical refuge'."

Omith Mukherjee (studio manager, Red Tape) was also impressed with the amount of real talent within Sheffield but a talent often accompanied with low self-esteem and a reluctance to follow this up.

OVER
20m

combined social media reach of South Yorkshire bands/artists.



The survey also went some way to establishing the longevity of careers and number of new entrants. A minority of musicians (just under 5%) succeed in staying in the city and pursuing music in the long term. Just under 20% have been active in music for fewer than 5 years and the highest proportion have been active 5 – 10 years.

When asked what proportion of gigs had been paid in last 12 months over 10% had not played 'paid for' gigs for a year. 44% had been paid for half, or more than half, of the gigs they played. One respondent stated "We've had a small amount of money back when we sell over our quota of tickets. But this is a small amount. We are moving towards more ticketed gigs"

This statement has brought up the question of how widespread the 'pay to play' culture is in Sheffield and would warrant further research as we look at how bands and venues can develop audiences in future.

Social Media Reach

An interesting additional strength we found is that Sheffield bands, artists and composers have a combined social media reach of over 20m (Facebook) and 4.5m (Twitter).

A self-sustaining infrastructure

Sheffield musicians are well served by a large number and high calibre of recording studios in the city covering all sizes, different specialisms and attracting a wide range of clientele from local bands to international artists. There is without doubt a culture of making with local bands choosing to spend on studios plus instruments and equipment (see section 5 – a thriving music scene).

2. Access to Spaces and Places. Recording Studios

There are 65 recording studios, ranging from fully specified project studios to well established facilities regularly producing major release recordings.

It is perhaps this number that has surprised many the most. Sheffield's studios not only provide an ongoing service of high quality facilities, talented engineers and producers for local bands, but also attract national and international artists. The combination of musical talent, producers and production facilities is cause for celebration: the city is undisputedly a centre of high quality music making.

A relatively conservative estimate of local spend per year by musicians on recording studios would be in the range of £203,000 (based on minimum spend in our survey categories) – £239,000 (still with minimum spend in the 'over £1,000' category). 15% of respondents stated 'over £1,000'. This spend is from the grassroots community rather than higher profile musicians.

When we asked recording studios and rehearsal facilities what percentage of users had an S postcode the median answer was 80% and the lowest 50%. Not only have they provided a springboard for homegrown talent such as the Arctic Monkeys, but half of respondents in this survey also attract international artists and producers to their facilities. These have included Geri Halliwell, Duane Eddy and Donny Osmond right through to Jim Sclavunos (Nick Cave & the Bad Seeds and Grinderman).

Case Studies

2Fly

Set up in 2001 by Alan Smyth in a "concrete shack", 2Fly's humble beginnings belied the talent of its creator, who attracted the cream of Sheffield's emerging talent from 65daysofstatic, The Long Blondes and Reverend and the Makers to the Arctic Monkeys themselves. With an ever-growing list of loyal clients, Alan recruited a second engineer, Dave Sanderson, and the business moved to more ample surroundings in 2008.

Since then they have continued to turn out high quality recordings for bands from near and far and 2015 saw them host their own stage at Tramlines Festival. In 2013, Computer Music Magazine listed Dave Sanderson alongside Steve Albini on their list of 'ten leading sound engineers'.

www.2flystudios.com



Steelworks

Aptly named for a Sheffield-based recording studio, this hotbed of pop belongs to Grammy and Ivor Novello-winning Eliot Kennedy, who has produced a string of hits for the likes of Boyzone, Bryan Adams and the Spice Girls.

www.steelworksstudios.com

Yellow Arch

Since 1997, this self-described 'house of creative madness' comprising a recording studio and rehearsal rooms has seen the likes of Duane Eddy, Texas, Sister Sledge and Skrillex pass through its doors alongside locals like Richard Hawley and Slow Club.

With the odd special event to its name in the past, it has recently diversified to open as an official live music venue too, with a 150 capacity and a 10K sound system.

www.yellowarch.com

Results of our recording studio and rehearsal space survey

The responding studios tended to employ 1 – 2 people full time and 1 – 5 people part time. This totals a minimum of 65 – 130 full time staff and 2.5 – 163 part time staff. Just over 21% were within their first two years of operating, 29% had been running 3 – 5 years, 29% 6 – 10 years and over 21% for 11 years+. In addition to economic contribution and artistic development, a further benefit is the impact of visiting artists on the local economy. This impact includes hotel bed nights plus visitor spend on local restaurants, bars and retailers.

However this section of the community in particular commented on the need for help for small and start up businesses. "Production is the invisible craft that is ignored in Sheffield". The survey found that respondents also expressed concern about "spaces and places" especially the threat to rehearsal spaces or venues: property speculation meaning cheap spaces were no longer available.

Spaces and places for live music performance and other activities such as rehearsing, recording and music education are integral to the success of a Music City. The range of music venues should span informal to formal, indoor to outdoor, and all sizes in order to meet the needs of artists at every point of their career.

The Mastering of a Music City report



"If a 16 year old goes into a venue with terrible sound and lighting, does it motivate them to make it a career? Not likely."

Mark Davyd, CEO of Music Venue Trust

Venues

69 venues are listed, 16 of which are dedicated music venues, 32 are bars that regularly present music, 16 are miscellaneous venues that host music events and 5 are nightclubs that also present live music. Of our respondents none of the venues stated they had been operating for 1 – 2 years (though we are aware of at least 1 successfully trading for 1 year), 33% had been operating for 3 – 5 years, 6 – 10 years and 11 – 20 years respectively.

Case Study – Leadmill

Sheffield's most iconic venue turned 35 in 2015. Voted favourite live music venue by NME readers on numerous occasions, anyone who is anyone has played here over the years, from the Culture Club to the Strokes. Franz Ferdinand once told Arcade Fire that playing the Leadmill was a "rite of passage". It's also home to regular club nights. Expect queues.

In terms of employment the numbers of full time employees ranged from 2 – 25. As one would expect from the sector there is a higher level of part time, and especially seasonal, employment with responses ranging from 1 – 50. The average being 14. These initial figures were taken from a fairly small sample and would benefit from further research.

"There is a 'triangle of doom' – Nottingham, Leeds, Manchester with touring bands often bypassing Sheffield due to the lack of a good mid-sized venue"
Paul Tuffs

Of the venues that responded (a low response rate) 85% was the average percentage of customers from an S postcode. Obviously venues also welcome visiting artists who help boost the local economy including hotel stays and spend on local restaurants, bars and retailers. 75% of respondents stated they were involved in other areas of the music industry. Once more, a high overlap was identified across the sector. Venues not only provide economic impact but also play a vital role in artistic development and indeed local employment.

"The rationales behind large-scale arena projects, and public investment in them, often feature their positive impact on local businesses. These benefits are clear. However, equally evident from our research is that supporting smaller spaces for live events also has long-term impacts – it develops the talent which goes on to fill larger spaces." The Cultural Value of Live Music from the Pub to the Stadium: Getting Beyond the Numbers. Dr. Adam Behr, Dr. Matt Brennan & Professor Martin Cloonan 2014



Responses from our musician's survey included some (a limited amount of) criticism of some venues' approach to presenting music.

"To begin with, it is without question that the city is a recognised hub of musical activity with a robust record of producing significant musicians, and that I feel myself that I owe what little success I have had to being based here rather than somewhere else. However, there are several observations I would hazard on reflection. For a start, the main ingress for musicians starting out and wanting to get any sort of currency in the city is naturally open mics, but to say the city is over-saturated with them would be an understatement, and whilst this might initially seem of benefit to the amateur starting out, it is in fact quite the opposite given that venues in the city feel bound to put on 'live music' events irrespective of whether the venue is even capable of doing so favourably (whether in the case of a venue simply lacking a footprint that lends itself to the idea, lacking equipment that is actually usable for the purpose, or in the case of so-called promoters or bookers who quite often don't have the faintest earthly clue of what being a promoter actually entails, vis a vis promotion, content instead to simply earmark a date for an event with the pub/club/venue and leave the heavy lifting of promotion, and sometimes even sourcing technical materials, to the bands themselves)."

It is however worth remembering that there are many challenges facing venues, the whole sector faces some wider issues from recent planning laws to licensing restrictions. Even local governments face wider challenges. One possibility to help address these issues might be sector-wide informal meetings, possibly each with a particular focus to help address the frustrations and issues that can be solved – and to lobby against bigger/ external threats to the sector. There may also be a case for small-scale capital support for venues.

Rehearsal Facilities

Sheffield's 21 rehearsal facilities offer in excess of 70 rehearsal rooms. The total number of rehearsal rooms is difficult to estimate with many spaces and rooms being used on an ad-hoc basis by bands operating 'under the radar'.

Comments from owners of rehearsal facilities suggest that the majority run at full occupancy without the need to advertise though, often based in cheaper properties, many have the same vulnerability to the whims of property developers as some studios and venues.

3. A receptive and engaged audience

A common challenge for music cities is building an audience for local performers. There is a strong core audience for some elements of live music – the underground electronic scene is thriving and venues such as Corporation successfully sustain audiences year-round.

Liam O'Shea (producer, promoter, artist, venue) and **Leeroy Powell** (Itchy Pig Records, Just Good Music PR) both reported a vibrant electronic / underground scene however Liam also commented that, partly because the city is student orientated, it can be difficult to sustain strong attendance all year round. With some venues this has a knock on effect that employment patterns are seasonal. Leeroy did also add that there are some areas where promoters could be encouraged to take greater risks and not simply rely on the safest booking options.

Most bands have a local audience but may struggle to break out of a relatively insular Sheffield circle. A minority of bands have followed a different path and built a worldwide profile and audience but perhaps aren't too well known back at home/associated with Sheffield (e.g. Bring Me The Horizon – an international stadium band). Many bands do seem to resent the pressure of having to promote gigs and build the audiences for venues – understandably they just want get on and perform, ideally with high quality sound. As mentioned the venues may have 'behind the scenes' stresses and strains too.

Paul Tuffs (sound engineer, studio and rehearsal space owner) felt that "Sheffield audiences can be perceived as hard to crack."

Audience engagement is a key area for further research in our recommendations. This snapshot has explored the makers and the local music industry. Further Music Sector research should include a focus on consumers of music, the size of the market especially for attending live music, and the economic and social impact of the music sector. It should also look at how venues, festivals and musicians can work together on audience development.

One of the more visible examples of audience engagement is the festivals in the city: Tramlines has grown in 2015 to welcome 150,000 admissions and Sensoria's admissions have increased from 2,000 in 2008 to 15,000 in 2014. Though both are still a little vulnerable – there are many national examples of festivals folding in the last five years, a constant reminder of the fragility of most festival business models.





"The music sector in Sheffield is the best bit – a lot of people with shared interests. It's so close knit."

Leeroy Powell (Itchy Pig Records, Just Good Music PR)

4. Record labels and other music related businesses

The artists and makers of Sheffield are surrounded by a network of services and organisations that can assist with many aspects of playing, promoting and distributing their finished work. It's not unusual for Sheffield bands and artists to even set up their own infrastructure from labels to self-managing.

Our research found 24 Record Labels, the majority of which are small scale often set up by bands to self-release. Itchy Pig is a classic example of a Sheffield music business, cutting across many areas and providing several services. The company's main activity is as a PR agency (who keep costs affordable for Sheffield acts) but also runs a label too. The label has a roster of artists of which 10 – 20% on average are from Sheffield.

Some bands and collectives such as The Crookes, Audacious Art Experiment, Nat Johnson and In The Nursery have started up their own label in the DIY spirit of Sheffield.

Case Study – Just Good Music PR

With services from 'tastemaking' to full release options, Just Good Music aim to promote excellent – but overlooked – emerging artists. Focusing on House and Electronica, they have worked with artists including Moodymanc and Stretford Dogs Club, festivals including Unknown Festival and Collect! and organisations like Party for the People. A relatively small proportion of their current clients are local though they offer generous rates for Sheffield artists. www.justgoodmusicpr.com

Other music-related businesses based in South Yorkshire include:

- 20 Sound Engineers (live)
- 11 Producers
- 32 Promoters
- 12 Managers, management companies and 3 tour managers
- 21 Journalists and listings offers
- 7 Agents & Bookers
- 5 PR and Pluggers
- 6 Sync Agents and other music industry services

As is the case with the whole sector, there is a high overlap of people working across many of these roles, each part time.

Festivals

Festivals are of huge value to cities and on many levels: they are a great economic driver and provide a platform for local talent. They have a softer impact in the general lifting of spirits – a morale booster for the city and creating a sense of vibrancy too. A year-round calendar of festivals not only ensures the city feels vibrant but also enables ongoing employment for freelance suppliers; this ranges from production and technical staff to promotional staff (including photographers, freelance PR, social media specialists).

Further value is derived from commissioning acts – this enables artists to create new works that they can then monetise through releases and touring at other venues across the world. This type of economic impact tends to go unrecorded but often makes the difference of enabling a musician to make a living.

There are a minimum of 17 music focused festivals across the South Yorkshire region of varying size and scale. Sensoria has the added offer of SensoriaPro providing an industry/conference element in addition to a public programme.

"The challenge is it's not necessarily so easy to get known outside of the city."



5. A thriving music scene

Sheffield has its own take on a vibrant music scene and James O'Hara offers a suggestion as to why it's different:

"For me the most exciting thing going on in Sheffield is everyone taking it into their own hands and doing independent venues, labels, tee shirts, basically none of it is within the typical model and no one gives a flying f*** about the traditional label model as they know it's broken. There's a huge distrust of the 'industry' which I think is very healthy. You've seen a shift away from careerist indie-by-numbers c**p and instead you've got a hugely vibrant DIY scene of bands, art spaces, screen printers, artists. places/labels like Lughole, Delicious Clam etc... and some of the best music from Sheffield in years like Sievehead (best record from the city I've heard in a long time), Seize The Chair, all the Delicious Clam bands etc... and none of them are in it to be 'famous' or any of that nonsense. They're just making great music with their mates. Some of them will no doubt go on and get signed by labels and get wider recognition but that's not why they're doing it in the first place.

Then you've got the dance music end whereby traditional city centre clubs have been shunned to a large extent in favour of Night Kitchen, Hope Works and the other warehouse spaces.

It's given that side of the scene more scope to do different things and is probably a reaction to the sanitisation of chart friendly EDM drivel that is all over the charts.

Perhaps all these semi-legal DIY spaces should worry me as a venue owner but I think it just makes the whole city's music output more vibrant and interesting and in turn it makes the legitimate clubs and bars put on better, more interesting stuff, or it should do anyway!"

James O'Hara (Picture House Social, The Great Gatsby, The Cornershop)

"It feels like a really positive time for music in Sheffield, especially for students. The underground (electronic) music scene is more popular. Though there isn't necessarily more diversity. A challenge for the city is for promoters to take more risks in promoting new talent – some bands that are seen as a safe bet end up 'doing the rounds'."

Leeroy Powell (Itchy Pig Records)



"Sheffield musicians have a great heritage and reputation but many operate off the radar."

Matt Howden

Our survey asked how much musicians spend on musical instruments, software and equipment in a year. Over 70% of respondents spend over £250 per year and 25% of respondents replied they had spent over £1,000. A rough, but conservative estimate of spend would be £259,000 although the 'over £1,000' category could mean the spend is substantially higher. The above spend is by grass roots musicians that responded to our survey rather than the established musicians with international reach and arguably are likely to spend more.

A key local retailer of equipment and instruments (Sheffield-based with a worldwide online market) reported that around 10% of their customers have a Sheffield postcode, but in terms of spend that 10% of clients accounts for around 30% of turnover.

Benefits of a thriving music scene to the city

- Employment
(full and part time, plus direct and indirect to suppliers and freelancers)
- Vibrancy
- Unity and social cohesion
- Well-being
- Attracting talent: employees of all sorts of companies, and students
- Sense of place and of identity
- Brand and promotions of the city
- Tourism and heritage
- Economic impact
- Income for artists from commissions and touring new work.

Online and digital infrastructure

The region's largest and most established digital mediator are AWAL (first established in 1997 now integrated as part of the Kobalt Music Group) – a leading worldwide digital marketing and distribution company. AWAL's client list includes a huge array of major artists including Beck, Prince, Pet Shop Boys to name but a few – in addition to many Sheffield artists.

Websites: Sheffield has a strong web presence celebrating its music makers and their heritage however a Music Directory of all facilities from studios to shops is yet to exist.

www.uncommonpeople.co.uk
www.classicalsheffield.org.uk
www.sheffieldjazz.org.uk

Smartphone Apps: Sheffield Music Map

There are also a number of music enthusiasts such as Bouquet of Steel who have set up retail outlets, branded events and a social media presence that specifically celebrate Sheffield music.

The music sector is thriving in many ways but could possibly benefit from a Sheffield Music Directory – an easy point of reference for those wanting to find venues, bands and much more.

Music education – Courses and Education Facilities

The South Yorkshire region has at least 10 organisations offering a variety of music sector educational courses – ranging from Music Technology, Performing Arts (BTEC Level 3) through to an artist development academy. There is a Sheffield Music Hub providing a central point of contact for a wider network of education professionals.

Multi level government support and broader city infrastructure

It is hoped this 'snapshot' will see the beginnings of new opportunities for making and playing music in Sheffield (and beyond). Sector-wide discussions are recommended with a view to more support, not only financially, but to see the city embrace music as a key driver for both culture and the economy. A little assistance could help the sector achieve its potential. The Mastering of a Music City report reflects on city initiatives that have ranged from suitable parking facilities to music offices providing a 'one-stop shop' of assistance.

Some Conclusions

It cannot be emphasised enough that most people in all areas of the music sector were very enthusiastic about the talent, passion and vibrancy of the music sector in Sheffield. There is also a sense of hard graft with folks carving out a living in studios or venues but with little time for development work.

We have identified a wealth of music creators (over 465 bands/artists) but few agencies with the resources to support the talent. There is a definite fragility about this pool of talent – there is no depth of reserves and it is questionable how resilient certain sectors are. It has supportive networks but also diversification is a necessity for many.

In-depth one-to-one interviews with renowned band managers, studios, engineers and venues revealed a vibrant current market with lots of talent and music-making activity, but much of the work is never released or reaches the market. Many musicians don't have the skills, contacts or capacity to ensure their work is released. This was backed up by a slight sense of frustration from some artists needing a platform to showcase their music, with many keen to pursue a music career. Even those who aren't especially money motivated expressed certain frustrations about finding a good platform to perform their music.

Further to this there is a pool of musicians, many with aspirations to pursue their music, who need to be helped along the spectrum from hobbyist/'amateur' to professional.

Gaps in the market

We found at least a perceived gap in the market for mid sized music/ arts venues. Feedback from the musicians' survey also suggested pockets of frustration by some musicians about the experience of performing live, not simply the payment but the lack of provision of decent sound and proper promotion.

The research has identified that Sheffield is regularly omitted from national tour schedules and young audiences lose out on accessing inspiring performances.

This point may be due to wider issues and factors and needs further research (p.10).

There could be more enablers in the city fulfilling roles in management, A&R and PR – general advocates for the city and its talent. Several comments reflected the need for bands to break beyond the boundaries of Sheffield and for the city to shout out loud about its talent.

Swot Analysis

Strengths

- Vibrant scene of makers, a large number very driven simply by the need to create music
- Talent pool
- Impressive and renowned musical heritage
- DIY culture – a unique take on the music world
- Creativity and innovation in many music genres from electronic to folk, free noise to rock

Weaknesses

- Lack of funding resources/help
- Lack of professional acumen
- Lack of resilience of the sector – many areas from festivals to venues to studios are very vulnerable
- Lack of mid size venues.
- Music not considered as a career option
- Lack of routes to market
- Pockets of collaboration take place but the sector has yet to galvanise across the 'value chain'

Opportunities

- A cohesive celebration of Sheffield as a music city
- Sheffield's take on the music scene compared with the wider industry (see p.14)
- Collaborations
- Joint marketing initiatives
- Education Initiatives
- Marketing
- Festivals as a platform, connector and dealmaker
- Champions for the sector
- Celebrating the city's music heritage
- Professional support
- Mentoring
- Wider dialogue across the sector and consensus on issues and opportunities
- Wider dialogue with the broader city infrastructure

Threats

- Gentrification a threat to spaces – venues, studios and rehearsal facilities
- National policies and threat of litigation making government officers cautious and increases workload
- The levels of support and financing available to the sector to enable growth

Some Recommendations

“A vibrant music economy drives value for cities in several important ways: job creation, economic growth, tourism development, city brand building and artistic growth. A strong music community has also been proven to attract other industrial investment, along with talented young workers who put a high value on quality of life, no matter their profession.”

The Mastering of a Music City

Recommendations for further research and actions.

Some recommendations are written with an air of caution – members of the music community are acutely aware that the environment that sometimes makes life feel difficult is often also a catalyst for its creativity. Many members of the sector happily reject the traditional methods of the music business whether labels, agents etc. The DIY ethic is strong. But there may be some ways – informal and possibly in-kind that could just make a difference.

1. Voice Of Sheffield

Despite some 69 venues being listed, there are some gaps in the market for music venues to ensure that bands can showcase their work at every stage in their career.

Given the DIY ethic of much of the sector it may also be worth exploring the ease of use of unusual, disused and meanwhile spaces for this purpose.

Festivals provide a platform and help position the city as a vibrant centre for music; these organisations are also somewhat vulnerable, needing assistance to gain more stability and grow.

But it might also be worth noting that there are currently a lot of challenges for venues setting up and surviving. It would also be useful for Sheffield to play its part in asking government agencies, of all levels, local to national, to take action.

2. Shine The Light

Sheffield has cause to celebrate and collaborative campaigns could help have a ‘sum of parts’ effect in promoting all aspects of Sheffield’s music scene.

Examples might include:

- Joint initiatives or campaigns e.g. compilation albums (like Bouquet of Steel) physical or digital.
- Create a Sheffield Music Directory – an online resource that is a one-stop shop for all things Sheffield music from studios to shops.
- Invest further in promoting the city’s music heritage – a constant reminder of the sheer scale and breadth of innovation that takes place here.
- The city’s music scene needs some ‘Champions’ to shout out its unique strengths. The key trick will be to harness and celebrate such strengths as the DIY ethic in Sheffield without sanitising or ending up with a ‘design by committee’ approach. The musicians themselves would be well placed to decide on this with some help from the Champions.
- Plus of course, The Year of Making in 2016.

3. Let’s All Make A Bomb – Routes To Market

“Successful Music Cities create a supportive environment for artists so that they can focus on doing what they do best: making music”

The Mastering of a Music City.

There is scope for more research to identify specific needs of musicians and other members of the community – it is imperative musicians have their say about the best way forward. It is also clear however that there is something of a ‘music mountain’ of work produced that could be heard by more people. Even just encouragement to sign up to agencies such as PRS for Music and PPL may mean some more income in the sector for very little effort.

The potential for economic growth is immense and the music industries should be seen as a growing and essential part of Sheffield’s economic investment future.

Help could be provided to set up DIY labels and support to find ways to distribute the written material. Also assistance in finding gigs outside Sheffield and possibly event delegations getting bands to international festivals (see www.y2tx.com) could be delivered in relatively informal ways and have genuine impact. Some cited the Momentum fund by PRS for Music Foundation as an interesting model to support bands.

Recording studios also made a plea for help and it may be that a marketing fund could be made available. This is an area of spend often considered a luxury but may reap long term gain and increased brand awareness. Recording studios can be vulnerable to cashflow issues and the whims of the market and assisting them with some diversification might also be a possible model. Less reliance on short term band bookings and building resilience are key. E.g. training the next generation of sound engineers, a fund allowing more artistic development and writing partnerships, diversifying to become a successful venue (as in the example of Yellow Arch) are all possible options.

Supporting the production sector would arguably increase employment levels in this area and in turn their economic contribution and impact.

4. Suck It And See

We need to find ways to encourage risk taking by both punters and promoters. Targeted support could be made available to enable promoters to take more risks and help develop audiences for lesser-known bands.

Further research should focus on the consumer and could identify successful audience development campaigns and collaborations.

5. The Time Is Now

Music is a USP for Sheffield.

It is music that attracts many people to Sheffield whether to study, visit or work and a city-wide approach to enable a thriving scene is well worth exploring. Future developments and city planning, particularly residential plans, need to consider music as an economic driver.

A long-term plan could make significant impact on Sheffield's music scene especially for the next generation and emerging talent. A strategy adopted over 10 years that isn't subject to changes in personnel and personal whim. Possibly an interesting historic example of developing young talent (and is in keeping with the informal and unconventional approach of many creatives) is that of the Meatwhistle: this informal network of young creatives somehow spawned a generation of artists that became hugely influential, respected and some of whom became world famous with careers that have spanned decades.

Clock DVA's Adi Newton described Meatwhistle's ethos and influence in an interview on artcornwall (where he now resides).

"Sheffield was at that time a cultural wasteland. But within the centre of Sheffield, just off the infamous West St, stood some Victorian former education buildings, part of which was occupied by the anarchic arts theatre project known as 'Meatwhistle'. 'Meatwhistle' filled a unique gap and gave inspiration, support and guidance to many who created and enjoyed their time there. It was run by Chris Wilkinson, his wife Veronica, and co-helper, Justin. Chris was a playwright and former theatre director... I had no pre-conceptions of ever getting involved in music, it was only through chance that it occurred. I have never considered myself a musician."

"Meatwhistle was a 'Thelemic Castle' for those early pioneers of Electronic, Ambient, Industrial, Minimal, Electro etc. music. Meatwhistle was not a material resource but more a mind space where concepts and ideas could be given full reign and experimented with. In fact the Rabelaisian slogan 'Fay ce que voudras' (Do as you will) describes the philosophy of Meatwhistle."

Other support for the pool of musicians who need to be helped from 'amateur' to professional might include a range of skills development and networking.

This snapshot shows that this is a positive, vibrant time for Sheffield music

but it has also identified the chance to harness the wealth of talent here and the sheer drive of music-making taking place. A smart strategy would help to build a better infrastructure where it's really needed and wanted, to establish a deeper dialogue with the sector and finally shine a well-deserved light on Sheffield music. We can then – as a proud and nurturing music city – pave the way for the next generation of unique, innovative and superbly stubborn DIY do-ers.

Further Research Recommendations

- More in-depth research into employment levels and economic contribution.
- Further research into the classical sector.
- Further research into the education provision within the city.
- Research into the economic impact of venues and festivals, to include research participation rates, consumer spend and audience development for bands, venues and festivals.
- More in depth research across the sector – if there is help to be had how this could best meet the needs of the city and its creative community and how best can members of that community collaborate?
- Research into export and potential export growth for interested Sheffield musicians and organisations.



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The Mastering Of A Music City Amy Terrill, Music Canada 2015

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