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INTRODUCTION

Michael Dugher  
Chief Executive Officer, UK Music

I’m delighted to introduce our first report into Sheffield City Region’s vibrant music scene and the huge contribution it makes to the regional economy.

UK Music embarked on this report after we joined forces with City Region Mayor Dan Jarvis MP to set up the Sheffield City Region Music Board in 2018.

We both said at that time that we were determined the new board would not be a talking shop and would develop a concrete plan of action for music in the City Region.

Thanks to Dan’s leadership, the Music Board is up and running, bringing together representatives from the local music industry, as well as councillors and others.

This inaugural report paints a high level overview of the City Region’s music scene so we can identify areas where we can drive forward change and establish our priorities to grow the music industry.

Our research shows that a total of 832,000 people attended live music events in the Sheffield City Region in 2017.

Of those, 521,000 were local people who poured into venues to see both great local talent and some of the touring acts who come to the region.

The total also included 311,000 ‘music tourists’ – visitors from outside the City Region who gave a vital boost to the local economy with their visits in 2017.

The spending power of these music fans delivered a huge £92 million boost to the economy of the Sheffield City Region.

That’s on top of the immeasurable pleasure, enjoyment and cultural diversity that music brought and continues to bring to the local community.

To ensure that cultural and economic enrichment continues, we need to make sure we do all we can to protect the music ecosystem of the City Region.

We need to nurture and support the venues, particularly smaller and grassroots venues, that are the bedrock of the local music scene.

We must also strive to reverse the decline of music in education which is both a regional and national area of concern. If young people do not get the chance to play music in school or local rehearsal spaces and venues, then the talent pipeline upon which our industry relies will be in serious danger.

I know that Sheffield City Region has a fantastic music heritage. I hope you enjoy this report and will work with us to deliver an even better future that builds on that legacy.

FOREWORD

Mayor Dan Jarvis  
Sheffield City Region Mayor

Arctic Monkeys, Pulp, Bring Me The Horizon, Def Leppard, Toddla T, Kate Rusby, Lesley Garrett, Barnsley Youth Choir, Skinny Pelembe, the list of Sheffield City Region’s music stars is inspiring and impressive.

Our region is blessed with musical talent, with great venues large and small, and with a host of leading production and technology-based businesses.

We’re also home to fantastic events and festivals, such as Tramlines, which has gone from strength to strength. 2019 was the biggest festival yet with more than 90,000 people enjoying over 100 live music acts throughout the festival.

But we know that there is more we could do to ensure we promote these strengths nationally and internationally; creating a stronger culture of creativity and developing the talent we have here.

That’s why we partnered with UK Music to establish a Music Board for our region, and that’s why we’re delighted to see the publication of this important report.

Our Sheffield City Region Music Board, made up of representatives from music venues, music hub leads, representatives from festivals, local authorities and more, has been exploring how we can work together to champion music makers, music lovers and the music industry to support talent and grow our region’s cultural economy.

Laura Bennett  
Sheffield City Region Local Enterprise Partnership Board Member

This report will help to establish where we are now, inform our conversations, and provide valuable evidence for planning the work that we do next.

We look forward to getting started in this next phase, working closely with Michael Dugher and the great team at UK Music in making this Music Board not just a meeting of people, but a force for cultural change in our region.
THE SHEFFIELD CITY REGION MUSIC BOARD

The Sheffield City Region (SCR) not only boasts an incredible musical heritage with some of the world’s best-known bands and artists but is also home to passionate people who have dedicated their lives’ work to music.

Established by Mayor Dan Jarvis in October 2018, the SCR Music Board is the first Music Board to be set up outside of London. The board, chaired by Local Enterprise Partnership board member Laura Bennett, is made up of representatives from music venues, independent artist development organisations such as Higher Rhythm and DMF Digital, music festivals, music hubs, national and regional music professionals and local authorities who have come together to be a champion for music makers, music lovers and the music industry.

The Music Board is working to foster music education and career development, to engage with and support musicians and music organisations, and to celebrate the region’s music heritage and excellence. Their aim is to harness the talent and ambition of all those who are passionate about music, from primary school-aged children aided by the brilliant South Yorkshire Music Hubs, right up to established musicians.

The region is also home to a whole host of music events including Underneath the Stars, in Barnsley, Sheffield Makes Music, an annual celebration of music makers and audiences, weaving music through the streets of Sheffield city centre, the Wentworth Music Festival, a one-day music bonanza establishing itself in Rotherham and industry events like Sensoria Pro, which are all examples of existing great work keeping Sheffield City Region live music audience’s dancing.

CASE STUDY: HIGHER RHYTHM

A hub for music and creativity, Higher Rhythm is a not-for-profit organisation which operates across Yorkshire.

Formed in 2001, the Doncaster-based body nurtures two pro-level recording studios, Doncaster’s community radio station Sine FM, a record label, management of digital distribution and live events. All these underpin programmes of artist development.

They also run accredited courses and ‘real-world’ volunteering opportunities, where trainees and aspiring professionals can gather experience in areas such as sound engineering, events organising and radio presenting. Higher Rhythm’s services are fully-inclusive, engaging BAME and disabled artists and supporting people from deprived areas and disadvantaged backgrounds.

The organisation has recently expanded its courses to offer a Higher National Diploma, which involves an extensive team of established music industry professionals as guest lecturers to further strengthen the vital links between learning and the real world.

As well as its role as a PRS Foundation Talent Development Partner via the Yorkshire Music Forum, Higher Rhythm delivers the ‘Breakthrough’ Artist Development Programme, funded by Help Musicians UK and Arts Council England. This programme is designed to intensively support six Yorkshire artists annually with a full package of opportunities to help them, tangibly, progress their careers.

Breakthrough’s first year included artists such as Skinny Pelembe and Dylan Cartlidge. Success is measured by artist achievements which include new releases, growing sales, increasing fan-bases and social media performance. Artists are also encouraged to evolve from home-town gigs to playing festivals and international events, gain regional and national radio play, and improve business practices to ultimately increase their professional income.

Higher Rhythm’s primary focus is on levelling the playing field and encouraging more diverse music talent to flourish.

Steve Mundin
 Senior Manager, Higher Rhythm

Photo Credit | Hannah Peel - Devonshire Dome | © Laura Merrill

Photo Credit | Steve Mundin | © Jamie Bubb
SHEFFIELD CITY REGION IN NUMBERS

**832,000**
Total live music audience in Sheffield City Region in 2017

**311,000**
Number of music tourists in Sheffield City Region in 2017

**521,000**
Total local attendance of Sheffield City Region residents at music events in 2017

**£92 MILLION**
Total direct and indirect spend generated by music tourism in the Sheffield City Region in 2017

**37%**
Proportion of live music audiences in the Sheffield City Region in 2017 that are music tourists

**297,000**
Number of domestic tourists visiting the Sheffield City Region in 2017

**14,000**
Number of overseas music tourists visiting Sheffield City Region in 2017

LIVE EVENTS IN 2017

**FESTIVALS**
£8.2 MILLION BOX OFFICE SPEND
86,840 ATTENDEES

**ARENAS**
£23.2 MILLION BOX OFFICE SPEND
639,850 ATTENDEES

**GRASSROOTS**
£2.9 MILLION BOX OFFICE SPEND
177,100 ATTENDEES

**OTHER**
£3.8 MILLION BOX OFFICE SPEND
199,846 ATTENDEES

REGIONAL BREAKDOWN IN 2017
INCLUDING BOTH CONSTITUENT AND NON-CONSTITUENT MEMBERS

- **BARNESLEY**
  £111,000 BOX OFFICE SPEND
  6,720 ATTENDEES

- **BASSETLAW**
  £79,000 BOX OFFICE SPEND
  4,750 ATTENDEES

- **BOLSOVER**
  £2,000 BOX OFFICE SPEND
  110 ATTENDEES

- **CHESTERFIELD**
  £303,000 BOX OFFICE SPEND
  18,330 ATTENDEES

- **NE DERBYSHIRE**
  £7,000 BOX OFFICE SPEND
  410 ATTENDEES

- **DONCASTER**
  £456,000 BOX OFFICE SPEND
  19,000 ATTENDEES

- **DERBYSHIRE DALES**
  £3.2 MILLION BOX OFFICE SPEND
  76,230 ATTENDEES

- **ROtherHAM**
  £150,000 BOX OFFICE SPEND
  9,050 ATTENDEES

- **SHEFFIELD**
  £33.9 MILLION BOX OFFICE SPEND
  697,250 ATTENDEES

**Note:**
These figures on these pages are taken from 2017 and provides a baseline.
All data collected only relates to live music-based events. Ticketing data which relates to other events in multi-purpose venues, such as sport and comedy shows, are not included.
The ticketing data processed by UK Music and Oxford Economics aims to cover as many ticketing agents as possible but not all currently share data. The extent that these figures capture small local concerts for example may be conservative.

DIRECT TOURISM NUMBERS IN PROPORTION TO THE REST OF THE UK

- **Spending**
  2.9%
  £59 MILLION

- **GVA**
  2.9%
  £28 MILLION

- **Employment**
  3.4%
  855
RECOMMENDATIONS

1. OPPORTUNITIES FOR EMERGING TALENT
At UK Music we believe that whilst talent is everywhere, sadly opportunity is not. All young people should have access to music in education and everyone should have the chance to pursue a career in music. Emerging artists need help to develop their talent and build audiences. It is also crucial to the region’s talent pipeline to train the next generation of producers, promoters and other roles beyond musicians in the music industry. The City Region should seek to address the decline of music in education, which disproportionately hits children from lower-income families, by promoting music in schools. Music education hubs are key to delivery and the Combined Authority should help to coordinate the six hubs that operate across the City Region. Local authorities in the region should also work with industry to increase provision of rehearsal spaces. The Combined Authority should explore working with organisations like PRS Foundation to instigate Momentum funding, which will help acts fulfil potential and branch out into international markets.

2. PROTECTING GRASSROOTS MUSIC VENUES
Sheffield City Region has a special ecology of grassroots music venues which need to be protected and nurtured. The ‘agent of change’ principle is now enshrined in the National Planning Policy Framework and gives venues much greater protection against developers. Local authorities in the Sheffield City Region should fully implement the principle and be able to offer business rate relief and other practical support including with licensing. Venues should also work with the Combined Authority to improve accessibility at venues, including for deaf and disabled audience and performers.

3. DEVELOPING MUSIC BUSINESSES
The Combined Authority has important powers over economic development and generation. This needs to be leveraged in order to support the growth of music businesses across the city region, increasing employment and productivity as a result. The City Region’s business Growth Hub should tailor its programmes and advice to benefit music start-ups and SMEs regarding access to finance. The Combined Authority should also work with the Local Economic Partnership to develop a strategy to attract investment into the local music industry. The Combined Authority should look at opportunities to promote talent in the Sheffield City Region around the globe. This should include initiatives designed to boost exports through artists attending international showcases such as MIDEM, the Amsterdam Dance Event, and SXSW in Texas.

4. INTEGRATING TRANSPORT
The transport system in the City Region needs more investment and more coordination if it is to be fit for purpose in supporting the night time economy. Music cities can benefit from a comprehensive review of transport infrastructure, so that music fans, including music tourists and local people who are not based in close proximity to venues, can travel easily to the wider music scene. There are also issues for acts with finding appropriate parking spaces to unload heavy equipment outside venues. Many cities have now adopted a priority loading scheme where signs are erected outside venues stating that equipment can be unloaded. Train and bus stations in the region could provide perfect shop fronts for music. A broad range of interventions could be scoped out from licensing background music, to hosting performances, to pop up music tourism kiosks at transport hubs.

5. REACHING OUT TO EVERY CORNER OF THE CITY REGION
The Report underlines a great deal of potential in the wider City Region, recognising that there are different parts of the City Region have distinct needs and challenges, to develop their own music industries. The Combined Authority, in conjunction with the Music Board, should map all music activity across Sheffield City Region. Actively supporting the local music industry in this way will identify any gaps and the precise investment reforms needed to grow music across the City Region. Mapping all the venues, labels, recording studios and radio stations across the conurbation would ensure the scale of the industry is fully understood, as well as enabling a targeted approach for how the City Region markets itself as a hub for music and creativity.

UK LIVE MUSIC NATIONAL NUMBERS IN 2017

- **Total audience that attended live music events in the UK**: 29.1 MILLION
- **Total concert attendance in the UK**: 25 MILLION
- **Total festival attendance in the UK**: 4 MILLION
- **Local residents attended local music events in the UK**: 18.2 MILLION

MUSIC TOURISM NATIONAL NUMBERS IN 2017

- **Total direct and indirect spend generated by music tourism in the UK**: £4 BILLION
- **Amount spent directly by music tourists**: £2.5 BILLION
- **Domestic number of music tourists**: 10.9 MILLION
- **Overseas music tourists**: 810,314
- **Full-time jobs sustained by music tourism**: 44,896
- **Music tourists**: 10.1 MILLION

Comparative national figures for 2018 are available in UK Music’s report *Music By Numbers*
CASE STUDY: SENSORIA FESTIVAL

Sensoria is the UK’s festival of music and film, presenting a unique mix of live music, film screenings, live soundtracks, installations and exhibitions. It supports music and film across Sheffield.

Sensoria’s first edition took place in 2008. It has welcomed guests including Jarvis Cocker, Bill Drummond, Laurie Anderson, John Grant, DJ Stingray and Jlin.

The festival creates the opportunity for audiences to discover unique experiences often in stunning site-specific surroundings.

Its informal industry event, Sensoria Pro, explores the latest developments in music and the moving image. Attended by musicians, filmmakers, music supervisors, games developers, sound designers and students, an annual highlight is the Scoring Contest with Ian Neil. Previous guests have included Chris Watson, Chris Packham, Nitin Sawhney, Mary Anne Hobbs, Feargal Sharkey and Geoff Barrow.

Sensoria attracted SynthFest UK to Sheffield with 1,000 ticket holders descending on this ‘modular meet’ from all over the world (20% from Sheffield and 80% overseas including places like Cambodia, Malaysia, US and across Europe).

Sensoria Festival averages around 15,000 admissions per year and SensoriaPro attracts around 60% of its delegates nationally and internationally. While 40% are local; the festival itself averages 70% from across South Yorkshire and 30% mainly from across the UK.

The organisation has also helped regenerate areas, bringing unused spaces back to life. Sensoria has unearthed many gems such as Abbeydale Picture House and Castle House, both now open and in creative use. It has also presented city centre drive-ins, swimming pool screenings and an AV installation in a 1960s hotel ballroom.

Jo Wingate
Director, Sensoria Festival

Nigel Humberstone
Music Director, Sensoria Festival

CASE STUDY: BARNSLEY LIVE

Barnsley Live was formed after the previous incarnation Live In Barnsley decided to end after five years entertaining the town.

The one day, multi-venue, indoor music festival, has become the highlight of the calendar year on the local live music scene.

There are six members of the core music organising committee, but running the event takes the skills and talents of over 50 people.

They include stage managers, sound technicians, and volunteers, who all contribute to the event which packs out venues across Barnsley.

The day features a range of music from solo acoustic performers and thrash metal acts, to jazz trios and seven piece ska bands. The application process is open to all genres.

Not only is the day a celebration of the local music scene, with acts performing to a packed house, it’s also a big day for the town’s economy.

After the debut event in 2018, local businesses praise the big impact effect the festival had on their takings and bringing the community together.

Chris Scarfe
Organiser, Barnsley Live

Photo Credit | Bo Ningen - Sensoria Festival | © Laura Merrill

Photo Credit | Barnsley Live | © Barnsley Live
Throughout this project we have received support from a wide range of individuals and organisations that have provided datasets essential to this analysis. These include:

- AEG Live
- Arts & Festivals Management
- The Association of Independent Festivals
- AXS
- BBC Music
- Glasgow Concert Halls
- Live Nation
- Music Venue Trust
- National Arenas Association
- PRS for Music
- Sage Gateshead
- See Tickets
- Symphony Hall, Birmingham
- Ticket Factory
- Ticketmaster
- We Got Tickets

We are grateful to all venues, festivals and other businesses featured in this report for sharing information and pictures. Additional thanks to all of our membership organisations for their support and help with this report.

The economic analysis was carried out by Oxford Economics and a methodological statement is to be found on the UK Music website.

The project is managed by Natalie Williams, Head of Research at UK Music.

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