

Brighton & Hove Arts Commission

**MUSIC IN BRIGHTON & HOVE
WORKING PARTY DRAFT REPORT 2009**

Working Party:

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Introduction

A working party on Music in Brighton and Hove, in itself a thing of positivity – shows that the city has long enjoyed a thriving music scene in both live and recorded music. This working party did not feel that there was a need to make radical suggestions on how to take more notice of music in Brighton & Hove. Music is not a cultural minority. Instead we gathered information in specific and purposely limited areas to ensure we did not come up with a “box ticking” paper that would be too general and inevitably gather dust on a shelf. The idea was to get people thinking about what we already have, see where there might be room for improvement, to think about what we want, and then we hope that together we might be able to go out and have some enlightened effect. Music in general has seen some major upheaval in recent years, especially in the way that it is sold and presented, it is particularly useful for us to be able to take the “musical temperature” of Brighton, and of the ability of musical outlets in the area to be able to adapt to this new emerging generation of music makers, listeners, promoters, vendors and of course, customers. So as we gallop to the end of the noughties we ask the question.....

Kevin Nixon

**IS BRIGHTON READY FOR THE NEXT DECADE OF
MUSIC?**



MUSIC AND THE PUBLIC

As we head into 2010 there is more available music in the world than ever before. The mobile phone revolution alone has meant that as a pastime, music now comes into more people's individual entertainment schedules than since the days before we had TV's. Domestic computers have taken music into a digital format and away from the concept of physical ownership. Even in-car entertainment, an area that traditionally has always been playing technological catch-up, is finally reaching the needs of the listening public. And on the live music front, an evening out to see a performer is less and less likely to see you standing in a poorly ventilated or freezing venue with a sticky floor and barely any facilities. Buying tickets for larger shows is now also very easy via the internet, and this new and wide accessibility has been a key factor behind the rapid growth in the live music sector in the last 10 years. Therefore the demand for music is ever higher, but the economics of music make for less optimistic reading.

We are now only a short step from music becoming a "utility", similar to how we receive our gas, electricity and telephone supplies. In fact in the fourth quarter of this year both Virgin and Sky will offer such a facility alongside their TV rights. Once that facility is established and we all grow accustomed to "paying our music bill", then we can look forward to a renewed stability in how music and musicians can sustain their careers and maintain small businesses within the sector. Until then, it remains an attractive but exceptionally tough job to make a living from music.

Brighton & Hove has to engage with all of the above in terms of thinking forward. In some areas it already does, for example it is possible most weeks of the year to pick up the local "what's on" and find something that caters for the individual, so there is no question that the artists and music makers are out there, and clearly they work hard to keep the standards of local music very high. But are they supported as well as they could be?

Is Brighton & Hove actually "on the map" of music in the UK? Well for our size, approximately a quarter of a million people, we do very well. For touring artists we get a very wide variety, but being only 60 miles and 50 minutes from London means that we sometimes have to travel for the real high-end quality of acts. That's fair enough. We can be honest with ourselves and say that in this area if not in others, we are a commuter city.

Does Brighton & Hove have a musical scene? Well yes we do: we have a large number of live venues all small but most within walking

distance. We also have more musicians in the area than ever before. The opening of the Brighton Institute of Modern Music in 2002 has made a significant contribution to the notion of the “Brighton Scene” in recent years having grown from 180 students in 2002 to its current 1000 full time students across 3 teaching centres. We have gems like the Brighton Philharmonic Society who manage to sustain a stunning standard of performance alongside an energy and drive.

LIVE MUSIC

The working party agreed that the focus of our thinking should be around live music in the city. The first step was to gather existing information about the size and shape of the potential sector. The headlines are below:

- 11 dedicated music festivals each year: and a situation where if one ceases then another appears in its place.
- The UK's leading music industry showcase and expo The Great Escape which attracts sell out audiences of 15000 one third of which are industry professionals from around the world.
- Regular concerts series and live music club nights, open mic and open sessions at pubs, bars, clubs and churches across the city.
- 45 venues that regularly host live music with a total combined capacity of 18,457. Of these venues the majority are under 100 capacity. The largest is the Brighton Centre with 5100
- An estimated 500 local bands and many local choirs, orchestras and other ensembles and music societies who put on regular concerts

Facilities Analysis

Brighton & Hove has one of the highest numbers of live music venues per capita in the UK, which is central to the city's reputation of enjoying a “thriving” music scene.

At the lower end, the number of pubs who accommodate “open mic nights” or duo's are numerous and seemingly healthy in terms of attendance, enthusiasm and popularity at this grass roots level.

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The next level of small clubs ranging in capacity from around 50 (The Sanctuary) to 200 (Audio) are again showing healthy attendance and doing well. One loss in this category in the last year was The Pressure Point on the Old Steine, a long standing venue from the early 60's :The Rolling Stones, The Kinks and The Yardbirds have all played there.

Intermediate sized venues of between 500 and 1000 capacity narrows somewhat to Concorde 2, Komedia and The Old Market in Hove: The latter two both having experienced significant financial problems and are not out of the woods as yet.

These sized venues are constantly vulnerable to tight budgets and margins as show costs against ticket price, particularly for stand-up venues, remain very difficult outside of sell-out shows.

There is clearly a shortage of venues with over 600 capacity. Of the four venues that exceed this number the largest, The Brighton Centre has been earmarked for long overdue redevelopment for some time. However this has been subject to further delays caused by the economic downturn in the wider economy. As it stands the venue is dated technically and aesthetically which makes it unpopular with some artists who could fill easily it. The Corn Exchange and the Dome Concert Hall are the other options for larger shows and events but has a wider commitment to also programme across theatre and dance and is not always fit for purpose for modern rock and pop gigs.

Other options for new bigger venues across the city have hit problems due to the costs and financing of refurbishing virtually derelict but listed sites (Hippodrome and Astoria). New developments have also hit other traditional and legendary music venues across the city. Noise sensitivities around the new residential blocks behind the former Gloucester club prevented live music being shown there and eventually led to its closure. The Pressure Point succumbed to the profits to be made from property development and has been converted into a hostel.

Open air ventures and temporary structures range from Fat Boy Slim on the Brighton Beach, to live bands playing in Churchill Square and at the seafront bars and in tented venues as part of the Festival Fringe. This is a credit to the city's forward thinking and 'can-do' approach to licensing outdoor and temporary events in the city and a recognition at council level of the social and economic importance of these to the city. However, these one off events and annual music festivals are all reliant on individual entrepreneurs taking the risk to make such things happen.

Festivals

The city has a vibrant and flourishing annual calendar of Festivals: an estimated 60 each year. These cover a huge range of art forms, interests and cultures. We estimate 11 are primarily music festivals and many more have a live music element to them. Some of these are very genre specific and have been able to secure public funding through grants from the Arts Council, PRS and other grant giving bodies. Even so, they rely on ticket income, sponsorship and a great deal of volunteer time and in kind support in order to retain their tenuous year on year sustainability. It remains to be seen what impact there will be on festivals from the inevitable squeezes on public sector alongside the continuing ripples of the economic recession has on businesses and private spending.

The purely commercial music festival businesses has not yet fared well in the city and its surrounds. There might be many reasons for this not least due to the huge size of the music festival sector in the UK: all competing for the same band, entertainments, punters and sponsorship packages. It takes a particularly high risk entrepreneurial approach to staging these ticketed big name festivals and not all of the promoters attracted to this business have robust business planning, skills and financial risk management strategies in place. When these events and festivals cease to happen then it leaves the local economy and local audience very disappointed: and in the worst cases of recent years out of pocket.

The dedicated indoor music festivals Great Escape and Brighton Live continue to flourish and make use of the excellent wide range of music venues in the city. Great Escape, an international professional music showcase/seminar festival, four years strong, is undoubtedly getting more successful each year. In 2009 this included 5000 music industry professionals and 15,000 ticket holders. Sitting alongside Manchester's In The City as the two significant UK Music gatherings, but crucially avoiding each other on the calendar, there is every reason to think that this will continue its success for many years to come.

Brighton Live has undergone some positive changes in the last year with the vastly experienced music industry artist manager Phil Nelson taking the Chair, and an overall upgrading of the event and a more professional approach to the financial side of the organisation. It has the potential to build into a showcase of the finest live music the city has to offer across all genres and to trade on the trendy 'Brighton' brand to attract visitors and business to the city.

RECORDED MUSIC

Brighton & Hove has enjoyed a reasonable profile in the world of recorded music. Skint Records achieved success in the 90's in the Independent Label sector primarily with Norman Cooks "Fat Boy Slim" project, while in the artist fraternity, acts such as The Kooks, Kate Walsh, Paul Steel, Cat The Dog, Electric Soft Parade, British Sea Power, The Go Team, and Bat For Lashes have all managed to sign major record deals in the last 5 years. Current hot tipped bands such as Marina and the Diamonds and the Wilkommen Collective keep the scene bubbling and current. With an 80% failure rate of "signed" artists being the common statistic in the music business, then Brighton's' ratio of success is vey high for a city of 250,000 people.

In previous decades Independent record labels have been able to be the fulcrum of "local scenes" and have given opportunities for those running small labels to gain experience in the actual business of music, and the development of careers in the music industry. The city is home to an ever shifting sector of independent record labels, distributors and other music dealers: the largest of which are world renowned independents such as Tru Thoughts & Fat Cat. Since 1990 the music industry has seen it Major Labels reduce from 22 to just 4, and unfortunately this downward ratio has extended to the independents too. CD sales are now only a fraction of what they were even 5 years ago, and the margins in selling music digitally on the internet are simply currently too small to sustain a small, local business. Many of this generation of young artists are faced with kicking off their careers by giving their music away for free on sites such as My Space. The next step is to gain digital distribution through the "Digital Majors" such as iTunes where the standard price-per-track is 79p. It does not take a degree in mathematics to see that the profit margin in modern music has been squeezed to almost breaking point. Where this hurts the local music communities is that the immediate investment in local talent has become very scarce indeed.

Some say that an artist's music in this era is only a promotional tool to sell tickets to see them live. The live music scene (as we can see from the above simple measure of venues in Brighton) is thriving, and once an audience is inside a venue then artists and their management have opportunities for further income from merchandise, and ironically from CD sales.

One thing of which we can be sure is that whoever the innovators in digital media are will be the greatest trailblazers within the music as industry (rather than as music as art form). The next big global opportunity is in the thing after (live, 4 track, audio cassettes, vinyl, CDs, Mp3s) Facebook, Myspace, iTunes, Spotify..... Brighton & Hove is at

the very leading edge of innovation in global digital media. The next big thing could be bubbling around here now amongst the unsigned bands, studios, labels and designers.

Rehearsal Space

The city is very well served with rehearsal spaces. Some of the main operators are:

Scream Rehearsal Studios
Monster Rehearsal Studios
Transmission Rehearsal Studios
Warner Rehearsal Studios
Under The Bridge Rehearsal Studios

Recording Studios

Top of the market recording studios are the dinosaurs of a bygone era, even the UK's most legendary: Olympic Studios in Barnes, London has closed its doors and Abbey Road is looking for a buyer as we write. Here in Brighton, amongst the enormous amount of hidden bedsit and bedroom lap top studios we have a good standard of recording facilities for hire that serve the level of artists operating on the Brighton & Hove circuit from demo to master recording. Listed below are the main operators:

Metway Studios, Kemp Town.
Brighton Electric Studios, Lewes Road.
Ironworks Studios, New England Quarter.
Monster Studios, Shoreham Harbour.
Lumen Studios, Hanover.

Music, Arts and Study Support Service

Our Music, Arts & Study Support Service which is a part on the Children and Young People's Trust, provides a holistic range of music learning and participation opportunities primarily for children and young people (0 to 19) across the City. Over 6000 CYP per week engage with the service through learning a musical instrument in school each week with over 1000 activities taking place at a number of music centres across the city that operate twilight and weekends. Alongside these opportunities the service provides a series of holiday courses and tours for gifted and talented students, for example our Brighton Youth Orchestra.

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In recent years the service has developed increased opportunities for vulnerable CYP to engage with music, with projects such as cre8ive sounds working specifically with Looked after Children.

Working in partnership with local and national partners is a cornerstone of the work of the service and is fundamental to the development of innovative and creative music projects for CYP. Most recently this has included working with Glyndebourne Opera Houses youth opera the Knight Crew and The Go! Team inviting member of our youth Big Band to play of their third album and perform at selected festivals.

The service was judged to be outstanding in 2009 through the Federation of Music Service DCSF funded moderation programme.

Music is a subject that forms a part of the National Curriculum and is statutory from the age of 4 to 14 at which point students have a range of options to take a formal music qualification. At primary level the curriculum is delivered as part of the curriculum with a recent initiative which offers every child at KS2 an opportunity to learn to play a musical instrument.

The city has a specialist music college, Varndean School and a Performing Arts College, Blatchington Mill School. Music GCSE results for music are higher than the national average present 79% A to C.

Approaching 50% of the Cities schools have receive Arts Mark, with a large proportion achieving gold status.

This year see the launch of Tune In! The national year of music supported by the DCSF and DCMS.

Further Education and Higher Education

Brighton & Hove is well served in music education and FE colleges, Universities and private providers offer a wealth of music related provision to suit all styles and budgets. See Music Education Directory (www.bpi-med.co.uk)

On of those private providers is the Brighton Institute of Modern Music which is now the largest and most successful private music education centre in Europe. BIMM offers full time courses from Level 2 Diploma to Hons Degree. Some of the courses and degrees on offer are in partnership with local education providers, these are University of Sussex (BA Hons), City College Brighton (Levels 2 and 4 Diplomas, and Central Sussex, Horsham (Level 3) and works very closely with the local Learning Skills Council here in Brighton. Now in its 8th academic year

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BIMM has expanded rapidly from its original building in Rock Place, Kemp Town with 180 students to its current level of 1000 full time students, and has two further teaching campus's, both in Brunswick Street West, Hove. The latest facility has also seen the regeneration of one of the city's great buildings, the former Hove Town Hall which has lay derelict for many years since it last use as a snooker hall. BIMM has a very high vocational take-up and has produced hundreds of music professionals and a number of highly successful acts such as The Kooks, who have sold over 2 million albums to date.

Northbrook College, City College Brighton, and the Universities of Brighton and Sussex all offer very strong music courses and continue to attract healthy numbers for studies in music over a very wide range.

PROFESSIONAL MUSIC SURVEY

The Music Working Party undertook a survey which was sent out to 10 Nation Promotors and Agents.

Ian Huffham (UK No 1 Live Agent) – XRAY Touring, Booking Agent for: Coldplay, The Coral, Bat For Lashes, Cypress Hill, Green Day , Gallows, Wyclef Jean, Turin Breaks, The Ting Tings, The Stereophonics, The Specials, Scissor Sisters, Robbie Williams, Nick Cave and The Bad Seeds, Manic Street Preachers, Grace Jones, Embrace , Echo And The Bunnymen, Black Eyed Peas, Eminem.

Natasha Bent (former BIMM student) – The Agency, Booking Agent for: Amy McDonald, Noisettes, Peggy Sue, Foals, Cage The Elephant, Esser, Sold Gold, Cut Off Your Hands, Los Capensinos!, The Antlers, Mark Broussard, Fionn Regan.

In addition The Great Escape 2010 will include some advocacy about the city's offer to music businesses in the delegates welcome pack. This will focus around our general offer to business plus our vibrant music scene.

The Great Escape will also canvass the delegates what specific support / resource/ quality would encourage them to move their businesses here.

