A Snapshot of the Creative Digital Scene in Sheffield
Foreword

This report has been commissioned jointly by the University of Sheffield and Creative Sheffield to sit alongside the three industry reports relating to Sheffield’s creative industries published in 2015 and supported by Arts Council England. These reports on Music, Beer and Art provided a snapshot of the creative, economic, cultural and social vibrancy and cross-cultural collaborations in the three differing sectors, providing areas of growth and development to prioritise over the next five years. It became apparent that the creative digital sector was also a prominent and emergent market where the crossover between sectors was providing fascinating and interesting parallels.

This snapshot of the creative digital scene in Sheffield is equally timely as it sits alongside parallel but overlapping information presented regionally by Tees City UK in the Tech Nation 2017 report and the forthcoming Sheffield City Region Digital Action Plan. However, the focus and indeed the findings contained here demonstrate once again that it is the cultural ecology of the city of makers that determines collaboration and creativity; but like all sectors, requires examination, evidence of growth and strategic questions about where the sector is heading.

We are indebted to the team of creatives who have been commissioned to bring together the evidence in this report and would like to thank Tamar Millen for project management and the author Laura IH Bennett alongside researchers Sheffield Digital, and collaborators Simon Collingwood and Deborah Egan OBE for input and advice as well as the interviewees and respondents to the questionnaires.

We share these findings to show that Sheffield as a City of Makers has the potential, the talent and the creativity to inspire the next generation of creative digital makers. It shows routes to markets, areas of growth and potential talent spots for future investors both internally and externally and highlights the wealth of opportunities that are available here.

Once again thank you for being part of this.

Professor Vanessa Toulmin
Director of City & Cultural Engagement
University of Sheffield
CREATIVE CITY, DIGITAL CITY

All cities tell their unique stories through their people, buildings, leaders, economic profile and cultural assets.

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The city is home to a vibrant creative community, with a wealth of cultural venues and a broad range of creative industries. Sheffield has a rich cultural heritage and a thriving creative sector, with over 21,000 businesses and 450 active bands. The Millennium Gallery is the most visited ‘Music and Performing Arts’ station in the UK, and over 21,000 businesses operate in Sheffield, including 2,000 tech companies. The city has a strong creative ecosystem, with a number of initiatives supporting the creative industries, such as the Sheffield Creative Hub, which is the sector in Sheffield with the highest number of businesses. The city is home to a variety of creative industries, including music, performing arts, tech, electronica, film, and digital arts. Festival of the Audacious Art Experiment, DINA, The Viewing Room and Site Gallery, charitable ticket agency Party For The People, and grassroots organisations; for instance Yellow Arch Studios, Sensoria all perfectly illustrate contemporary cross-disciplinary tech, electronica, film, music and performance. Festival programming in Sheffield is continually reactive to global trends. The most convenient way for our ever-changing digital landscape requires all creative to maximise audience reach, all creative need to leverage accessible and far-reaching digital platforms, and we’re now seeing streaming platforms ranging from football and fatherhood to international PR and events. The Sheffield Creative Hub, established in 2015, provides networking opportunities and a grassroots community level, the Sheffield Creative Guild, the Sheffield Creative City, helps to encapsulate this: Abdullah Al-Walli of Connect the Dots and Bad Taste Records,

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One of Sheffield's greatest assets is that creatives in the city are proud of the high quality of the work produced. A fierce independence runs through the entrepreneurs and individuals working in the digital creative sector, alongside immense pride in the city's identity.

Sheffield is a creative city with a vibrant music, art, and film sector. You can't talk about Sheffield's identity without talking about the high quality of the work produced. Heritage is a strong and unique brew; we provide a rich ferment of new work, venues and festivals, wholeheartedly supporting new and innovative ideas. The universities are noted for their creative sites.

When we asked our interviewees how they would characterise the creative digital sector in Sheffield, similar themes consistently arose.

Emma Cooper of Pimoroni:

"The city has a huge amount of raw to experienced talent entering a new chapter. The industry itself is going through so many changes and new areas of the city need to be developed to attract talent and reduce our dependence on the wider market. Sheffield is pretty well placed with all of those elements and has aspirations to be even greater."

Anna Bollinger of Appt:

"People who consciously decide to make Sheffield their home are typically interesting people, with a strong story. Sheffield is offering a new chapter. The industry itself is going through so much change and new areas of the city need to be developed to attract talent and reduce our dependence on the wider market. Sheffield is pretty well placed with all of those elements and has aspirations to be even greater."

Alex McLean of AlgoMech Festival:

"One of Sheffield’s greatest assets is that creatives in the city have a global economy. It’s where we live, with a wonderful lifestyle, cheap running costs, supportive community, beer culture. Sheffield is well interconnected and has a good network of people and companies. It’s a great place to live."

Deborah Egan, Director of DINA and SONA:

"Sheffield is home to a vast array of talented creative businesses. CAs, SMRs and multi-skilled artists that need to be nurtured through mentoring, with access to technology, affordable workspace and infrastructure that will help new and established artists and companies. It's a great place to live, with a wonderful lifestyle, cheap running costs, supportive community and beer culture. Sheffield is well interconnected and has a good network of people and companies. It's a great place to live."

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Sheffield, like many cities, has seen significant renewal over recent years. It has changed beyond recognition in the past three decades; we are on a journey towards reinvention, without losing sight of our heritage or what makes us unique.

The creative digital sector of Sheffield today is characterised by a renewed sense of pride in our city’s cultural and creative offering; an engaged and active grassroots community who run meetups and who are constantly striving for collaborations; and a more tech-savvy population who are aware of the potential of digital.

To build a picture of a changing sector in a dynamic city, it is necessary to have a frame of reference to provide context. KPMG’s “Magnet Cities” report (2014) provides the most comprehensive and robust framework to showcase Sheffield’s strengths and draw out some key recommendations.

The Magnet Cities report examined how cities can “flip the magnetic switch” to draw people, businesses and tourists to them. KPMG studied nine cities around the world, all of which successfully managed to flip that switch, and found that all nine cities went through an almost identical process of renewal, despite not being in contact.

The process undertaken by civic and community leaders to flip that magnetic switch followed these four steps:

1. Focus on their existing residents’ needs and uses of the city, as well as their frustrations;
2. Invest heavily in physical renewal through the creation of entirely new districts and the re-purposing of areas through live, work, and leisure;
3. Improve the quality of life by ensuring that there are interesting things for people to do and fascinating places to visit; and
4. Consider the commercial aspects and make sure that the city is good for current businesses as well as attractive to prospective businesses.

In this report, and through the lens of the creative digital industries, we conclude that Sheffield has many of the elements that constitute a “magnetic city” and make some recommendations as to how we might further build upon those advances. We have taken the seven principles of Magnet Cities, and have mapped the creative digital scene against them to assess how far Sheffield has advanced along the path towards becoming a magnet city. We demonstrate how Sheffield is reinventing its identity in a way that is consistent with its past, but that ushered in a new future.

SHEFFIELD: A MAGNET CITY

Sheffield has a magnetism. In early 2017, Perkbox and McLaren Automotive established footholds in Sheffield City Region, wishing to benefit from and participate in an ecosystem that is innovative, creative and rich in talent. These companies will further renew, strengthen and serve to attract additional investment into Sheffield.

1. Magnet cities attract young wealth creators
2. Magnet cities undergo constant physical renewal
3. Magnet cities have a definable city identity
4. Magnet cities are connected to other cities
5. Magnet cities cultivate new ideas
6. Magnet cities are fundraisers
7. Magnet cities have strong leaders

So then, what are the seven principles of a magnet city? And how does Sheffield’s creative digital scene fit into that?

The picture that emerges is a city on the cusp of something big. It’s an exciting time to be in Sheffield.
Attracting young wealth creators

Sheffield is a city of diversity. The city’s economy has proven to be resilient and has grown even in the last decade on the back of strong liveability scores and a good employment record. Sheffield is an attractive city to be part of, and has benefitted from an inflow of skilled wealth creators. There are a number of factors to this. The 2017 State of Sheffield report noted that “there are high rates of 16 and 17 year olds engaging in education or training and successful apprenticeship programmes”, and that “sectors such as the advanced manufacturing and creative and digital industries are growing, providing more opportunities for young people to live and work in Sheffield”.

Sheffield is home to two large world-class universities with a student body of approximately 60,000 undergraduate and postgraduate students, representing some 25% of the city’s population. This provides significant benefits to Sheffield and the wider City Region, and indeed the visibility of both universities is enhanced by their city centre locations. The Universities have in recent years transformed the city centre landscape through enhancements to their estates and wider communities.

Both universities are a training ground for young talent, a high proportion of whom continue to have a strongly favourable view of the city. Moreover, and specifically relevant to this report, both universities have strong departments in Design (Hallam), Games Development (Hallam), Engineering (University of Sheffield), as well as dedicated extra-curricular support for enterprise and entrepreneurship in The Hatchery (Hallam) and the Enterprise Zone (University of Sheffield); both universities play a full role in the cultural, civic, economic and creative life of the city, and from no worse in Sheffield’s separation between “town and gown”, we like in no other cities.

Lee Mulolland, Autodesk: “The high level of students who are active in the city, and those university/school graduates, combine to provide a rich seam of talent for the city.”

Autodesk is a global leader in 3D design, engineering and entertainment software. Headquartered in California, it has 30 people in its Sheffield office working across a global spread of built environment projects. The Sheffield team is mostly made up of residents of the city, many of whom moved to Sheffield to work with Autodesk.

Stuart Green at Zoo Digital: “Having access to the huge body of students and graduates in Sheffield is a big plus. A number of our staff are graduates from the universities here, and we decide on a lot of honorary staff, especially international students based in Sheffield, so we have a pool of native speakers of other languages who are based locally. This enables us to make content available in countries around the world, working with clients such as Netflix, Hulu, and Amazon.”

Darryl Fletcher of Finger Industries: “It’s an entrepreneurial hub with a growing community of creators and talent, so there is already an established network from which we can draw back up. We also have great local gin and local breweries, which also helps.”

“Four out of our 12 employees are from Sheffield, the others have either returned to Sheffield or have moved here for the first time. It’s attributable in part to the quality and breadth of projects that we undertake at Joi Polloi, but also because people are attracted to the idea of living in Sheffield with its close proximity to the Peak District.” Andy Bennett, founder of Joi Polloi
Steel Minions, the commercial games development company at Sheffield Hallam University, boosts the largest Sony PlayStation 4 teaching lab in the world. They were the first university in the world to release their own PlayStation 4 game, PieceFall, released in 2012.

The creative digital companies in Sheffield play a significant role in attracting young wealth creators to our city, and Sheffield itself is a creative and cultural offering. Hugh Mann Adamson, founder of Universal Everything, says, “It was good timing, as broadband was getting quicker exponentially; being in this city has really helped us to win local and regional clients and take on new and exciting projects.”

This movement is prevalent too in the games industry. Talk about games to anyone in Sheffield and you will hear about Sumo Digital and Devious Designs. The former is a large games development company based in Sheffield that employs 250 people and produces games for all the major brands including XBox, Nintendo and PlayStation. The latter is where in a competitive “dog-eat-dog” industry, it was crucial to have a solid sales model.

The rich creative pulse is reflected in the variety of cultural, creative and commercial activities that make up the city. Sheffield, Tramlines, the festival of the Mind, Seniors, the Children’s Digital Festival, DocFest, Tramlines, Festival of the Mind, Sensoria, the Lovelbytes Algorave festival, linking digital arts with mechanical dance, the AlgoMech festival, was a magnet for people, due in no small part to its creative and cultural offerings that keep it interesting and vibrant. A strong creative digital sector, providing opportunities for progression for the young wealth creators it attracts. Amongst the individuals who made their way back into education, there was a strong connection to the games development sector. Another “ex-Gremlin”, Paul Beech, company based in Sheffield who “make tech treasure for games development”, went on to found their own games companies, including Universal Everything, and before that Gremlin, have provided consistency for the job market and opportunities for education and career progression.

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The creative digital companies in Sheffield play a significant role in attracting young wealth creators to our city, and Sheffield itself is a creative and cultural offering. Hugh Mann Adamson, founder of Universal Everything, says, “It was good timing, as broadband was getting quicker exponentially; being in this city has really helped us to win local and regional clients and take on new and exciting projects.”

This movement is prevalent too in the games industry. Talk about games to anyone in Sheffield and you will hear about Sumo Digital and Devious Designs. The former is a large games development company based in Sheffield that employs 250 people and produces games for all the major brands including XBox, Nintendo and PlayStation. The latter is where in a competitive “dog-eat-dog” industry, it was crucial to have a solid sales model.

The rich creative pulse is reflected in the variety of cultural, creative and commercial activities that make up the city. Sheffield, Tramlines, the festival of the Mind, Seniors, the Children’s Digital Festival, DocFest, Tramlines, Festival of the Mind, Sensoria, the Lovelbytes Algorave festival, linking digital arts with mechanical dance, the AlgoMech festival, was a magnet for people, due in no small part to its creative and cultural offerings that keep it interesting and vibrant. A strong creative digital sector, providing opportunities for progression for the young wealth creators it attracts. Amongst the individuals who made their way back into education, there was a strong connection to the games development sector. Another “ex-Gremlin”, Paul Beech, company based in Sheffield who “make tech treasure for games development”, went on to found their own games companies, including Universal Everything, and before that Gremlin, have provided consistency for the job market and opportunities for education and career progression.
We started on this affordability journey back in 2010 when we took the decision to develop the Workstation and Small Heath, in an affordable city centre near the station, and within a 10 minute drive of the city centre. Castlegate Works, one of the financial buildings that make up the Workstation, House Tech, City-Space, Studio and Winter Garden and a further six buildings. Artists, architects and crafters created affordable accommodation for City-Grid. Zoe Digital, who moved there in late 2016, cited the growth of Sheffield as a centre for creative digital innovation, because in their new office, they have been able to expand their capability in video editing by having both a graphics and audio company close by. A specific precaution. According to City-Grid Chief, the new space has also enabled them to provide new facilities that are attractive to contemporary businesses.

Sheffield has a stock of good quality previously industrial buildings, and around the city centre that are now being adapted for the new and very different businesses. Works that have been adapted into “sheds” or manufacturing companies, have also been reimagined as modern office buildings.

In Sheffield, the newly created Office Box is being turned into a smart and dynamic workspace.

For the city to thrive, it needs the right culture and beliefs to provide the right environment, and Sheffield City Council is pioneering and demonstrating this. It is a clear statement of a desire for much more. The Knowledge Gateway will provide potential development sites, a more attractive environment, and will improve links between key destinations in the city.

The opportunities for space in Sheffield are varied, ranging fromurgeon and diverse business spaces to the renovated offices in older heritage buildings, to new purpose-built places in previous industrial buildings. Sheffield has developed an array of award-winning public developments, commercial and creative spaces. Shef

David Shore (2014) has commented on the importance of innovation for the city, noting that “innovations” are good for the city and with the wider community. We want the building to be a city asset that is available to a range of partners.

It’s a very clear statement of a desire for much stronger engagement in the city and with the wider community. We want the building to be a city asset that is available to a range of partners.

RAR 1514

Physical renewal
Investment in new buildings is essential in order to provide great spaces for the city’s residents and businesses, and to make the city a more attractive place to live. We are committed to making the city a more attractive place to live, and to make the city a more attractive place to live, and to make the city a more attractive place to live.

As a creative digital company, you can establish yourself quite easily.

Jenny Brown, Field of Dream
Shffield is recognised as a key lens through which the importance of its investment in and development of a world-class manufacturing and research sector is understood. Hundreds of thousands of dollars in investment by companies like Rolls Royce, Boeing and McLaren Automotive takes a major role in Sheffield manufacturing and engineering.

Throughout 2005, the successful ‘Year of Making’ campaign ran in Sheffield, cutting across broad industry sectors including digital, creative, the arts. This campaign was based around Sheffield’s heritage of ‘making’ traditionally in the steel industry. What the Year of Making campaign successfully achieved was to show Sheffield’s young, vibrant creative community what this making is all about and making their own, whether by turning local social and cultural spaces into Little Mesters works (Regather, Portland Works, Harland Works) or by expanding the word ‘making’ to include our own specialisms, setting creative and digital pursuits alongside manufacturing and engineering.

The word ‘making’ has a powerful galvanising effect locally and transnational with audiences less familiar with Sheffield. It is inclusive and applicable across a range of sectors, and can be interpreted in so many ways. No other UK city can lay claim to the word ‘making’ with quite the same spirit of hard work, craftsmanship, innovation, cutlery manufacturing to creative digital products and services, taking this heritage and making it their own, whether by moving into disused Little Mesters works (Regather, Portland Works, Harland Works) or by expanding the word ‘making’ to include our own specialisms, setting creative and digital pursuits alongside manufacturing and engineering.

The commodity that runs through Sheffield’s history from cutlery manufacturing to creative digital products and services, is a city that values work, craftsmanship and attention to detail and obsession over producing a high quality product. Sheffield’s innovative willingness to set high standards fulfills that and means that the city is ever better placed to engage and welcome creative digital businesses, operating as they do at the cutting edge of modern-day ‘making’.

The legacy of advanced manufacturing continues to evolve through R&D-led innovation in Sheffield City Region. The Sheffield Legacy of Advanced Manufacturing Research Centre (AMRC) fosters world-class research and innovation in critical sectors, playing a pivotal role in driving economic growth and shaping a future that is focused on sustainability and social impact.

The most interesting clients and projects are the ones that are both high end and high quality, whether that’s award-winning design, cutting-edge technology, or groundbreaking medical devices. The creative and digital sectors in Sheffield take enormous amounts of pride in their work, and the attention to detail and obsession over producing a high quality product is the same spirit of hard work, craftsmanship, innovation, that runs through Sheffield’s history.

Our clients come to us with cutting-edge technology and design, and we help them bring their ideas to life. We are proud of the fact that we only take on the most interesting clients and projects, and we are constantly striving to push the boundaries of what is possible.

In Sheffield, we are on the cusp of something big and we are ready to make it happen.
Sheffield can act as a city at the heart of a well-connected national network. Sheffield has historically played a major role in UK manufacturing, trade and industry, and is one of the leading cities in the United Kingdom in terms of the number of people employed in the digital sector, representing creative, digital and marketing firms in Yorkshire and the wider North of England.11

Locally, Sheffield has a number of different fora that connect people and tech sector in the North of England, providing links between individuals and companies working across the digital creative sector in Sheffield. Sheffield Digital, an industry-led body that acts as a network connector across the digital sector to provide opportunities for innovation and platforms for collaboration, is ramping up activity in 2017 to act as formal and informal places of exchange and initiated. These range from galleries and maker spaces to performance venues. The regular events of places like the Site Gallery, Ten24, the Audacious Art Experiment act as formal and informal places where ideas are exchanged and initiated. Sheffield is fortunate to be the home of many digital / arts / media festivals in Sheffield. Within the creative industries and the wider city region, Sheffield is one of the largest international documentary film festivals in the world, drawing over 2,000 visitors annually and giving the local economy a boost amounting to £12 million annually. Sheffield DocFest, bringing together people from across the world who work in documentary, animation and interactive media, provides a single voice for advocacy and representation. DocFest also promotes the sector, and provides a single voice for advocacy and representation. Sheffield has been involved in a number of pan-regional networks that connect people and enable shared learning, working in the creative sector for networking and collaboration. The Sheffield Creative Guild acts as a network connector across the digital sector to provide opportunities for innovation and platforms for collaboration, working in the creative sector for networking and collaboration. The Sheffield Creative Guild represents creative, digital and marketing firms in Yorkshire and the wider North of England, providing links between individuals and companies working across the digital creative sector.

Sheffield Digital acts as a network connector across the digital sector to provide opportunities for innovation and platforms for collaboration. Sheffield Digital was involved in one of the first projects that Laura Sillars, Artistic Director, was involved in was the Virtual Reality Arcade at Site Gallery, especially with DocFest. This was the UK’s first VR experience, before this to, “[...] the spirit of adventure at Site Gallery, especially with DocFest. The Sheffield Creative Guild brings together individual freelancers as a network connector across the digital sector to provide opportunities for innovation and platforms for collaboration.

Connectivity to other cities

Sheffield is an active city at the heart of a well-connected national network. Sheffield has historically played a major role in UK manufacturing, trade and industry, and is one of the leading cities in the United Kingdom in terms of the number of people employed in the digital sector, representing creative, digital and marketing firms in Yorkshire and the wider North of England. Sheffield is popular among digital and creative businesses here, with plenty of potential clients locally and nationally. We relocated to Sheffield for better access to clients and talent. There is probably an awful lot more good work going on than most people realise.

Sheffield Digital acts as a network connector across the digital sector to provide opportunities for innovation and platforms for collaboration. Sheffield Digital was involved in one of the first projects that Laura Sillars, Artistic Director, was involved in was the Virtual Reality Arcade at Site Gallery, especially with DocFest. This was the UK’s first VR experience, before this to, “[...] the spirit of adventure at Site Gallery, especially with DocFest.

Ten24 have one of the world’s largest photomontage rigs. This has enabled them to work with Warner Brothers, Pixar, Sony and Sega. Using this they digitised 800 characters for Final Fantasy.
Cultivating new ideas

A mark of a magnetic city is to the extent to which it can enable opportunities and facilities. Both universities have enterprise city. Both universities are extremely active in driving innovation and employability facilities that provide work space, training, also nurture the local entrepreneurial community with mentoring and activities for students across all disciplines. Sheffield Hallam University and the University of Sheffield to test out their entrepreneurialism. Sheffield Hallam to meet fresh challenges, whether in advanced manufacturing the University of Sheffield's new Manufacturing Research Centre participating in apprenticeships than any other major city."12

Sheffield's two universities create a culture of innovation in the city. Both universities offer an array of activities to meet fresh challenges, whether in advanced manufacturing or health sciences. The world leading Attenborough Research Centre and the at the Advanced Health Research Centre offers research partnerships with many of the major digital tech firms in the city, such as The Forge, Wellstreet and Exyo. Sheffield's two universities create a culture of innovation in the city. Both universities offer an array of activities to meet fresh challenges, whether in advanced manufacturing or health sciences. The world leading Attenborough Research Centre and the Advanced Health Research Centre offers research partnerships with many of the major digital tech firms in the city, such as The Forge, Wellstreet and Exyo.

The Hatchery out of the University of Sheffield, has run nine Startup Weekends Sheffield has inspired several individuals to support and vehicles to spark new ideas. A critical part of this is providing support and vehicles to spark new ideas. Enterprise Zone has led to lively creativity and investment in 2012, Site Gallery was one of three galleries around the country to host large-scale exhibitions. The environment does a lot to inspire us. Working in a small environment in Sheffield is because of the proximity to the Peak District. Within the sector, there is a narrative that can't be unwritten. It's not by chance that Sheffield is a leader in games development and develop their social enterprise ideas before pitching in front of a panel of judges. Darren also runs the Sheffield branch of the Global Social Storm, a semester-long programme for students to help them to develop their social enterprise ideas before pitching in front of a panel of judges.

The Hatchery's startup accelerator, Startup Coach for Digital & Creative to provide co-working space for student, Exyo and Goodvidio Sheffield Startup. Taking part in_a panel of judges. Darren also runs the Sheffield branch of the Global Social Storm, a semester-long programme for students to help them to develop their social enterprise ideas before pitching in front of a panel of judges. Darren also runs the Sheffield branch of the Global Social Storm, a semester-long programme for students to help them to develop their social enterprise ideas before pitching in front of a panel of judges.

Darren Chouings, Startup Coach for Social Enterprise at the University of Sheffield, runs the University's Global Social Storm, a semester-long programme for students to help them to develop their social enterprise ideas before pitching in front of a panel of judges. Darren also runs the Sheffield branch of the Global Social Storm, a semester-long programme for students to help them to develop their social enterprise ideas before pitching in front of a panel of judges.

Sheffield has a huge creative lineage and heritage in the industry here there's a momentum that can't be unwritten. It's not by chance that Sheffield has kept on producing these amazing design companies.
Attracting investment

The way that a city can leverage its assets to attract inward investment can make a huge difference to the economic growth and external perception of that city. Sheffield City Region has benefited substantially from investment from multiple sectors, and the Council and Sheffield City Region Local Enterprise Partnership have invested in immigrant talent in the shape of inward investment in a vital ingredient of growth and as a key part of HM Treasury's Northern Powerhouse Strategy.

Ken Nettleship, Investment Manager at Creative Sheffield, states that the majority of creative digital companies moving to Sheffield are those looking for affordability in both office space and talent, rather than competing within the heated market of London. Companies that move to Sheffield find cost reductions in office space and in some junior roles, and benefit from proximity to new clients and access to wider supply chains.

Ambitious and scalable creative digital companies find that Sheffield has an existing community of creative and like-minded people. The two universities provide a full pipeline of talent ready and waiting in the city that continues to attract from high毛利isation ranges from graduates. It is better and more effective to engage local graduates on the doorstep rather than attracting them from London. Further afield, there are 12 other universities across the region, meaning that companies have access to talent emerging from Edinburgh, Liverpool, Manchester and Leeds, amongst others. In the creative digital sector, lifestyle matters. The Outdoor City campaign, sponsored by Sheffield City Council, is particularly relevant and appealing to the creative digital sector. The lifestyle opportunities in Sheffield and the region as a whole are appealing for people looking for a stimulating work and life balance who don’t want to get stuck in urban sprawl elsewhere. With regards to foreign companies looking to move to the UK, a nice, clean, accessible city with a good quality of life is important. Companies know that the talent pool in Sheffield can make a case as a location to move to in five years. It is a clear advantage for companies with a growth plan that will take them beyond London.

New funding streams that target the North of England specifically are newly available in 2017, filling a void where previously there was no targeted investment for this region. Accelerated Digital Ventures (ADV) and the Northern Powerhouse Investment Fund have significant funds that are available for scaleups and startups, including creative digital companies in the North of England. This can only add to the already-attractive package for companies to consider moving to Sheffield. For companies looking to raise their first or next investment round, it is a more attractive proposition to be based in a location where access to flexible funds is transparent and relatively easy, and the competition is less fierce than in an overheated market such as London.

“The top 25 tech companies in Sheffield City Region employ more than 12,000 people and bring in more than £2 billion a year.”

Cam Spilman and Jon Rhodes, Paper

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“The top 25 tech companies in Sheffield City Region employ more than 12,000 people and bring in more than £2 billion a year.”

Cam Spilman and Jon Rhodes, Paper

“ Sheffield is where we want our families to live. We did discuss other cities when we started out and thought that, as well as our personal reasons for wanting to be in Sheffield, it also had other advantages: a central location, good digital community and talent pool, some decent sized potential clients, lots of relevant (and free) events. There’s a community of professionals who are probably as capable as people from most of the other major cities in the UK and it’s a good place to live and raise a family. We’re really proud of our city, there’s a great mix of people, companies, network and clients.”

Sam Spilman and Jon Rhodes, Paper

The top 25 tech companies in Sheffield City Region employ more than 12,000 people and bring in more than £2 billion a year.
Strong Leaders

Leadership in Sheffield comes from a variety of formal and informal sources, whether in civic and political bodies, or sector-specific community leaders.

In the creative and digital community, we are fortunate to have an array of community leaders who work tirelessly across many different sectors, often in a volunteer capacity, to take ideas and turn them into reality. By working together, they encourage collaboration and generally “make good stuff happen” in our city. The attitude in Sheffield is one of just getting on with it, not waiting for external approval or permission, but seizing an opportunity and seeing it through. Once a community-led initiative has a foothold, occasionally with private sector sponsorship, it is often the case that public sector support will follow through.

Two community-led initiatives that have been mentioned elsewhere in this report, Sheffield Digital and Sheffield Creative Guild, both have their genesis in a group of individuals working in the same fields (digital and creative in these instances) coming together to represent and advocate on behalf of their sector. As well as fulfilling a vital role in bringing visibility to the digital and creative sectors respectively, both organisations are able to participate in city-wide discussions at a senior level, bringing a collective voice that has more weight than the sum of its individual parts. The Creative Guild received match funding for an ACE bid from Sheffield City Council, Sheffield Hallam University and the University of Sheffield. Sheffield Digital established itself through sponsorship from both universities and some of the key digital tech companies in the city.

“Across Sheffield’s digital and creative sector there are nationally significant leaders pioneering new technologies and new business models. Whether that’s Sam Chapman of innovative telematics firm The Floow; Lee Strafford who created the first major competitor to BT’s dominance; or Carl Cavers of Sumo Digital who produce globally significant games, Sheffield’s leaders are thriving in a fiercely competitive sector. The vibrancy of the city’s economy rests with leadership of people like these, coming from different backgrounds and collaborating together on a shared vision.”

Paul Houghton, Partner at Grant Thornton and Leader of the Sheffield office

Joi Polloi have won two BAFTAs for work on TV programmes “Humans” and “Live from Space.” They also received an Emmy nomination for their “Don’t Stop the Music” campaign.
Creative Digital Snapshot Report Survey Evaluation

Methodology

The data in this section is based on a survey carried out in January 2017. The sample had a tight focus, accepting only those companies from within the city that specifically create interactive digital content or both interactive content specifically for digital distribution, or that develop technologies to aid or automate this process. This filtering was performed by hand, in order to avoid misrepresentations and skew inherent in SIC and SOC-based approaches. In addition, the geographic scope was limited to the city of Sheffield, excluding surrounding towns and the wider region. By basing this survey in this way, we believe that we have been able to gain a highly representative view of the overlap between the creative and digital sectors of the city’s economy. 41 firms provided data, which by our best estimate represents roughly one quarter of the total number of qualifying firms in the city (excluding freelancers). The resulting spread of services and sizes can be seen in the following diagrams.

Service offered by businesses in sample

- Digital & Culture: 52%
- Marketing & PR: 43%
- Digital Design and Development: 33%
- Video & Moving Image: 30%
- Games: 22%
- Digital fabrication/3D printing: 11%
- Creative Tech Startup: 11%
- Data Visualisation: 11%
- 3D/VR/AR/MR: 11%
- Digital Media Publishing: 11%
- Other: 6%

Sizes of businesses in sample

- Freelance (1 employee): 4%
- Micro (2-4 employees): 6%
- Small (5-20 employees): 19%
- Medium (21-99 employees): 43%
- Large (101+ employees): 23%

Average turnover by size

- Freelance: £50,525
- Micro: £132,554
- Small: £35,900,000
- Medium: £540,608
- Large: £1,017,500

Proportion of businesses that have current unfilled vacancies

- Freelance: 47.5%
- Micro: 50%
- Small: 55%
- Medium: 100%
- Large: 100%

Proportion of businesses that expect to recruit in 2017

- Freelance: 37%
- Micro: 37%
- Small: 47.5%
- Medium: 62.5%
- Large: 100%

Outlook and Confidence by business size

- Freelance: 83%
- Micro: 63%
- Small: 37%
- Medium: 37%
- Large: 100%

Outlook and Confidence by service provided

- Digital Design & Development: 82%
- Games: 86%
- Marketing/Branding/Content: 87%
- Digital Art & Culture: 75%
- Graphics/CGI/Animation: 81%
- Digital Fabrication/3D Printing: 67%
- 3D/VR/AR/MR: 75%
- Digital Media Publishing: 63%
- Data Visualisation: 83%

Outlook and Confidence by employee size

- Freelance: 100%
- Micro: 100%
- Small: 100%
- Medium: 100%
- Large: 100%

How often do you use freelancers?

- Regularly: 37%
- Occasionally: 51%
- Never: 12%

This shows that freelancers are strongly in demand, with strong collaborative work and flexible working attracting employers.
The vast majority of firms, from smallest to largest, export their services, although none do so exclusively.

There are a broad range of views on how people think Sheffield is perceived, but generally its reputation is felt to be some way below average and that the city deserves more attention for its creative digital chops. Another way of interpreting this is that there are a very small number of niche verticals in which Sheffield has a strong national reputation.

Where do you export to?

- Europe
- North America & Canada
- Asia & Pacific
- Middle East
- South America

Exports

- Freelance: 55%
- Micro: 47%
- Small: 36%
- Medium: 25%
- Large: 0%

Proportion of work done abroad:

- Lowest: 5%
- Average: 8%
- Highest: 100%

Sheffield

Compared to other cities in the UK, how would you rate Sheffield’s reputation as a creative digital hub?

- Freelance: 67%
- Micro: 33%
- Small: 53%
- Medium: 0%
- Large: 0%

Overall: 51%

Which of these would most make a difference to the Industry in Sheffield?

- More Flexible Workspaces: Freelance: 33%, Small: 53%, Medium: 0%, Large: 0%
- Overall: 51%

- Incubation/Acceleration: Freelance: 17%, Small: 32%, Medium: 25%, Large: 0%
- Overall: 34%

- Careers Fair: Freelance: 17%, Small: 32%, Medium: 75%, Large: 0%
- Overall: 32%

- Skills & Talent Matching Service: Freelance: 33%, Small: 26%, Medium: 25%, Large: 100%
- Overall: 37%

- Trade Missions: Freelance: 0%, Small: 47%, Medium: 25%, Large: 100%
- Overall: 37%

- A Major Digital Conference/Festival: Freelance: 67%, Small: 63%, Medium: 75%, Large: 100%
- Overall: 61%
Developing Sheffield’s creative
digital sector

It is a common refrain that one can be done to help our
creative and digital sector. This is particularly
relevant to Sheffield, an urban area with a skilled
workforce, a strong tradition in the cultural industries,
and an established creative and digital sector. However,
the city has not yet fully realised its potential. While the
creative digital sector is growing, it is not yet as robust as
some of its competitors. As a result, the city’s
leadership and policymakers must take steps to
support and develop the sector in order to
capitalize on its strengths and create a vibrant
ecosystem.

The creative and digital sectors are often
seen as drivers of economic growth and
innovation. They have the potential to create
demand for skilled workers, drive
entrepreneurship, and attract investment.
However, for these sectors to thrive,
they require the right environment,
infrastructure, and support.

Shaping Sheffield’s creative
digital community

As a city, we need to take a
strategic approach to
developing our creative
digital sector. This
includes creating a
supportive policy
environment,
providing the
right infrastructure,
and fostering a
creativity and innovation.

Recommendations

We recommend that the
government, local councils,
universities, and other partners
work together to develop a
strategy for the creative
digital sector in Sheffield.

We recommend that local
councils provide
support for the
creative digital
sector by
providing funding,
infrastructure, and
staff to
promote and
support the
growth of the
sector.

We recommend that the
city’s universities
provide
opportunities for
students to
engagement with
the creative
digital sector.

We recommend that
the private sector
invest in the
creative digital
sector by
providing funding,
infrastructure, and
staff to
promote and
support the
growth of the
sector.

Conclusion

Sheffield has a significant
potential as a creative
digital hub. However, in order
to realise this potential,
the city needs to take a
strategic approach to
developing its creative
digital sector. This
includes creating
strategic partnerships,
providing support to
entrepreneurs,
and fostering a
culture of innovation
and entrepreneurship.
With thanks to our interviewees:

Alex McLean, AlgoMech
Lee Millen, Autobots
Lisa Modlin, CADS
Deborah Egan, Connect the Dots
Tim Phyne, Branch Design
Jenny Rigby, Field Design
Nick Win, Human Studio
Sarah Howard, Ish & Adam
Andy Barrett, Jee Field
Allington Lewis, Creative Sell
Joe Harrison, Goudy
Aegh Ni Mhurchu, LUL Productions
Thomas Miller, Mus & Etre
Scott Milward, ObjectForm
Paul Norman, SIA Gallery
Leanne Knowles, SIA Gallery
Jacob Haggard, Steel Minions
Carl Cotton, Electric Agency
Jennie Boulde, Tex2
Matt Hess, Junction Everything
Yasser Knight, University of Sheffield
Vladan Gorni, Zim Digital

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Last but not least, thank you to the project team behind the Creative Digital report:

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