Surrey
Music Strategy
Appendix

Let’s talk music.

Argel Monte De Ramos | Surrey Fusion Festival

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Appendix A

Surrey Music Strategy Survey Results

To aid the analysis of Surrey's music ecosystem, Nordicity conducted a public survey from March 22 to May 13, 2022 via the Engage Surrey platform. The survey collected a total of 1949 responses. In addition to the Engage Surrey platform, Nordicity received responses through other channels, including Surrey's musician database (159 responses), the music business database (64 responses), as well as two 'quick poll' questions used at Party for the Planet (176 responses), and the Surrey Steps Up Youth Event (SSUYE) (42 responses).

Key Findings

- **Profile of survey participants:** The majority of participants reside in Surrey (84%) and are spread across all age groups.
- **Primary ways people engage with music in Surrey:** Participants primarily participate in music events as members of the public (68%) and listen to music on local radio stations a few times a week (65%). This finding suggests that approximately 350,000 people living in Surrey engage with music.
- **Primary sources of information on music in Surrey:** Most participants hear about music events through social media platforms (72%) and word of mouth (51%).
- **Most popular challenges to accessing music in Surrey:** Participants noted the lack of awareness of events (42%), limited parking (32%), and high costs (31%) as the top barriers to accessing music.
- **Main music themes that the City should prioritize:** Most participants point to the need for more free public music events in the community (39%) and new and/or improved music venues (33%) as top priorities. Other participants stress music-based activities that are inclusive and accessible to the broadest range of participants (22%) and improved marketing and greater awareness of music events (22%).
- **Expenditure:** 49% of respondents identified spending up to $100 on music activities (per person, per event).

Profile of Survey Participants

The following tables and charts provide a collation of all survey results.

FIGURE 4

Are you a resident of Surrey? (n=1555)

Of 1,858[11] respondents, 84% live in Surrey. Figure 4 illustrates in which town centre survey participants reside. As shown, the most prevalent respondent town centres are Newton (21%) and South Surrey (20%). The geographical distribution of survey respondents reflects the wide range of town centres reached.

[11] This value and subsequent N-values represent the number of individuals who responded to specific survey questions.

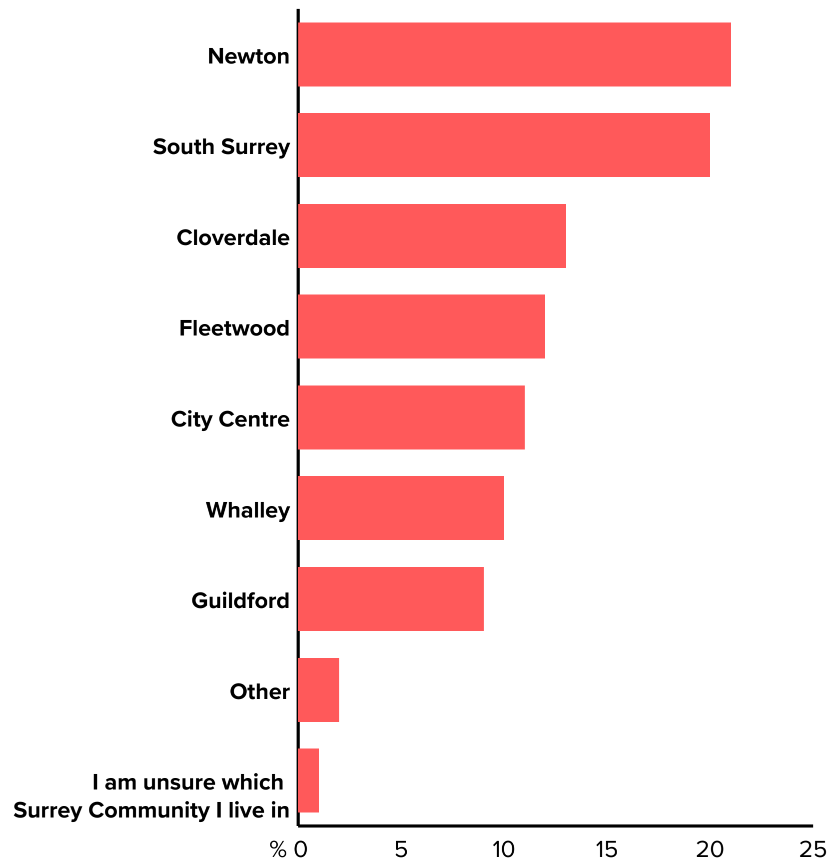
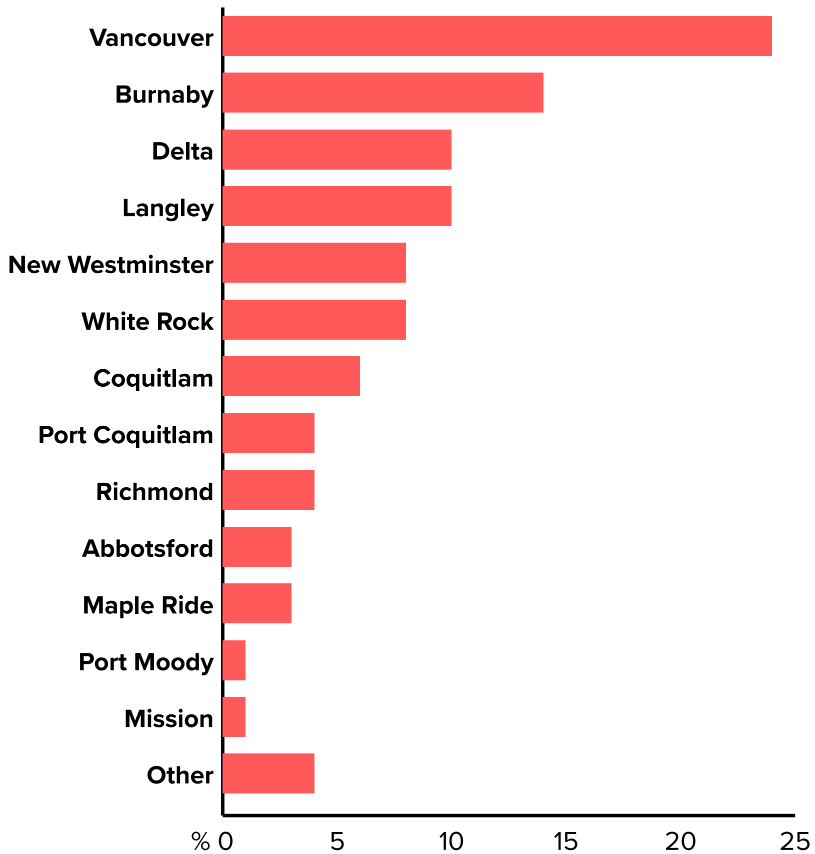


FIGURE 5

If not a Surrey resident, please indicate which municipality you live in. (n=299)



Of the 16% of participants who identify as living outside of Surrey, almost a quarter reside in Vancouver (24%) and a large share reside in Burnaby (14%) (Figure 5). Other respondents live in Delta, Langley, New Westminster, White Rock, Coquitlam, Port Coquitlam, Richmond, Abbotsford, Maple Ridge, and Port Moody. These results indicate that people from across Metro Vancouver participate in music in Surrey.

Source: Surrey Music Strategy Survey and Musician Database Intake Forms

FIGURE 6

Please indicate your age by selecting the appropriate range. (n=1699)

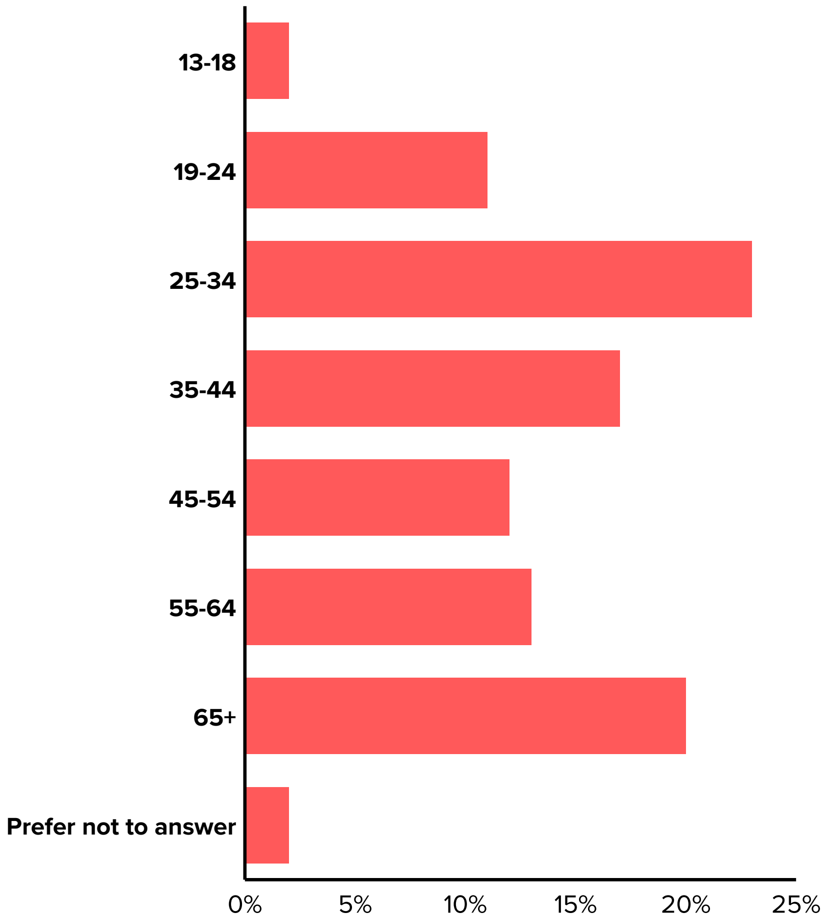


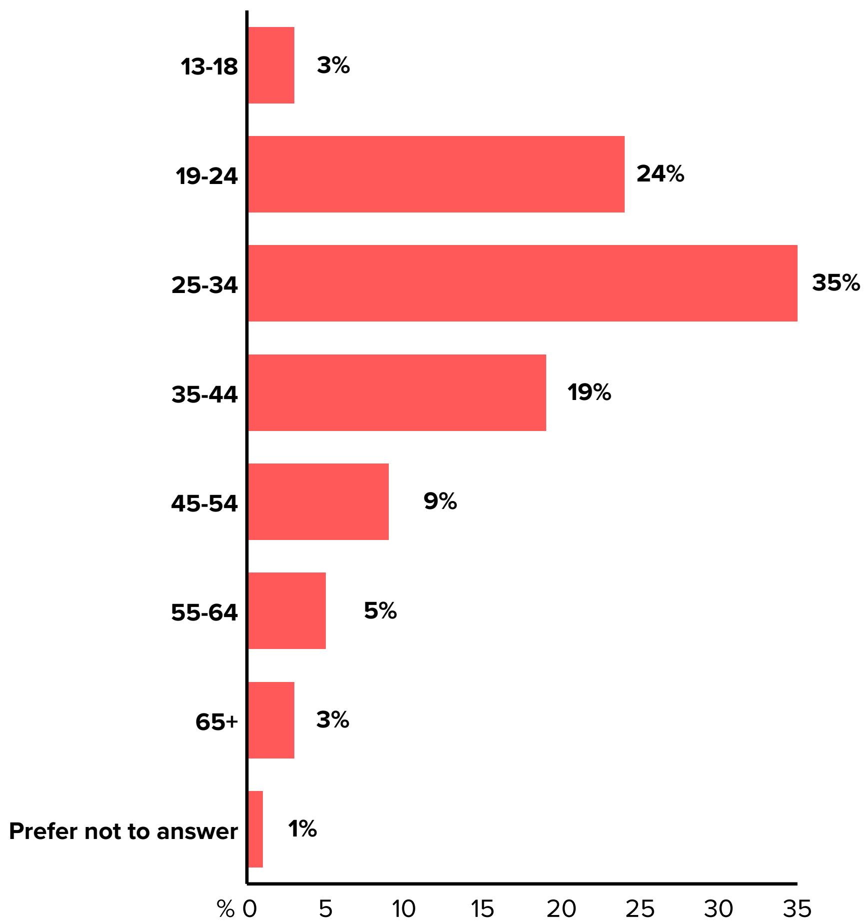
Figure 6 indicates the age range of survey respondents. The largest share of respondents is between the ages of 25 and 34 (23%), followed by respondents over the age of 65 (20%), and respondents aged 34 to 44 (17%). At only 2%, participants aged 13 to 18 years are underrepresented in the survey data.[12] For participants aged 19 and over, responses are quite evenly distributed across age groups.

Source: Surrey Music Strategy Survey

[12] Although this is a 'normal' response rate for this age range (13 to 18 years), the Project Team attempted to fill this gap through further data collection from two public events i.e., at Party for the Planet and the Surrey Steps Up Youth Event.

FIGURE 7

South Asian Stakeholders' Age Range (n=352)

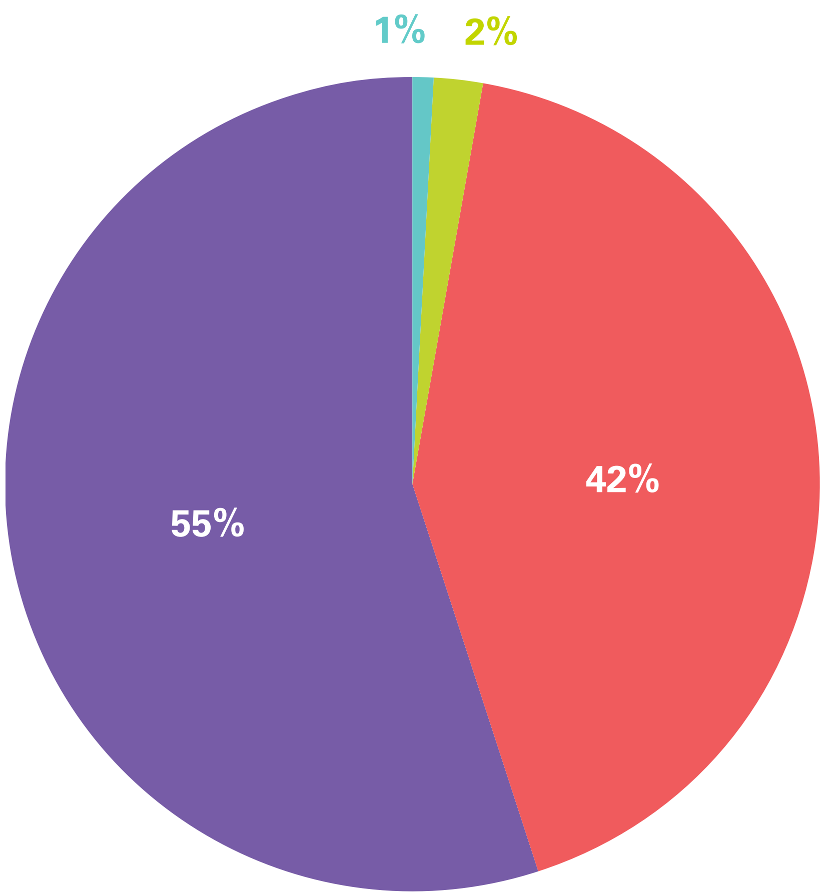


Of those who identified as belonging to the South Asian community, the largest share of respondents is aged 25 to 34 years (Figure 7). However, South Asian participants are not evenly spread across all age groups. Over one third of respondents are between the ages of 25 and 34 (35%), nearly a quarter are aged 19 to 24 (24%), and nearly one fifth are aged 35 to 44. In comparison, only 5% of South Asian respondents are aged 55 to 64 years and only 3% are aged 65 years or older.

Source: Surrey Music Strategy Survey

FIGURE 8

Please check all boxes that apply regarding the gender identity of the individual/group. (n=1699)



Survey participants were asked to self-identify their gender (Figure 8). The majority of participants identify as female (55%), followed by male (42%). Of the remaining respondents, 2% prefer not to say, while 1% identify as non-binary.

Source: Surrey Music Strategy Survey

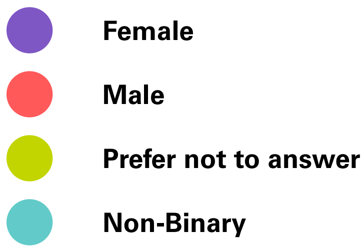
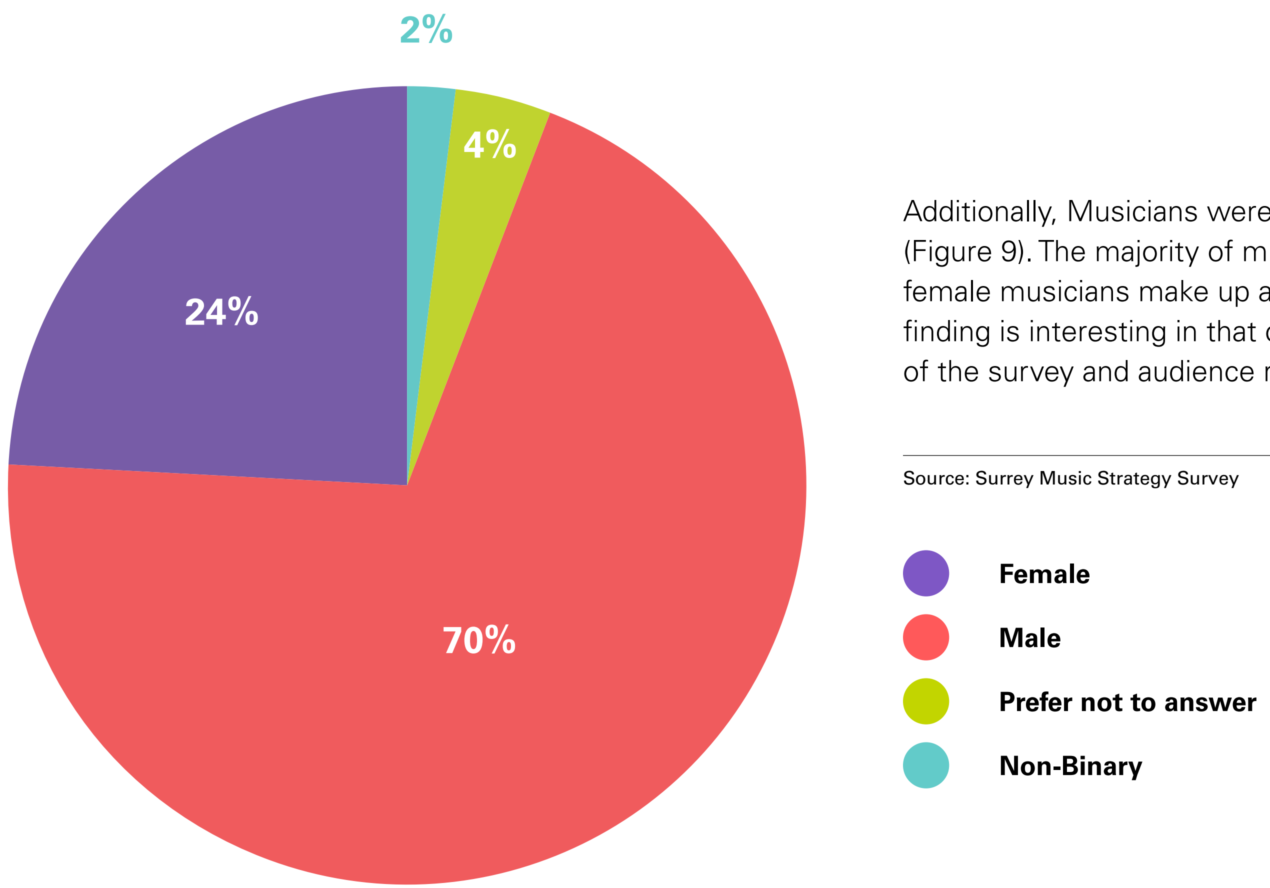


FIGURE 9

Please check all boxes that apply regarding the gender identity of the individual/group (n=325)

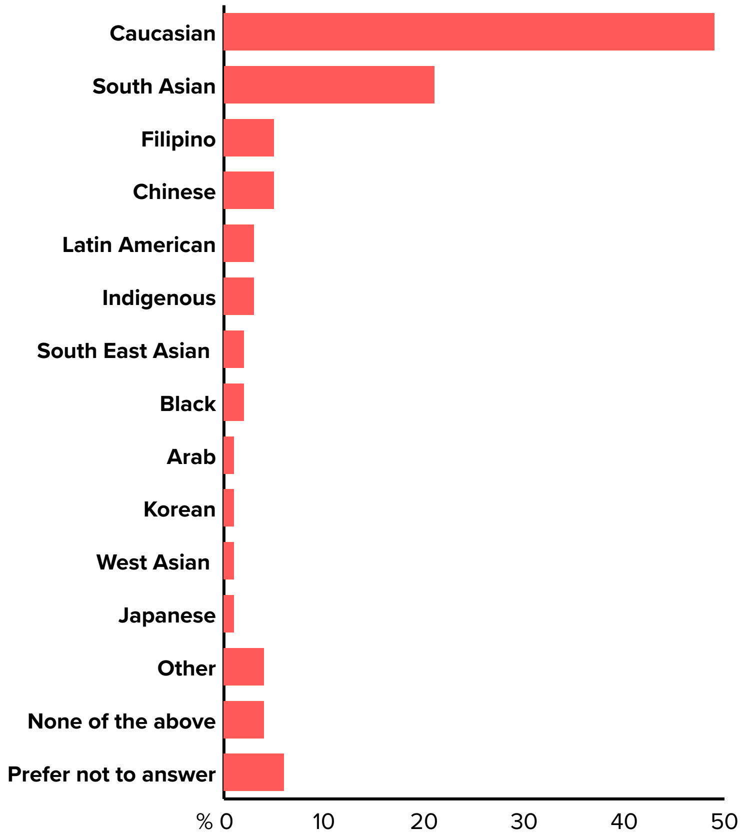


Additionally, Musicians were asked to self-identify their gender (Figure 9). The majority of musicians are male (70%), while female musicians make up almost one quarter (24%). This finding is interesting in that comparatively, the overall results of the survey and audience response identified as female.

Source: Surrey Music Strategy Survey

FIGURE 10

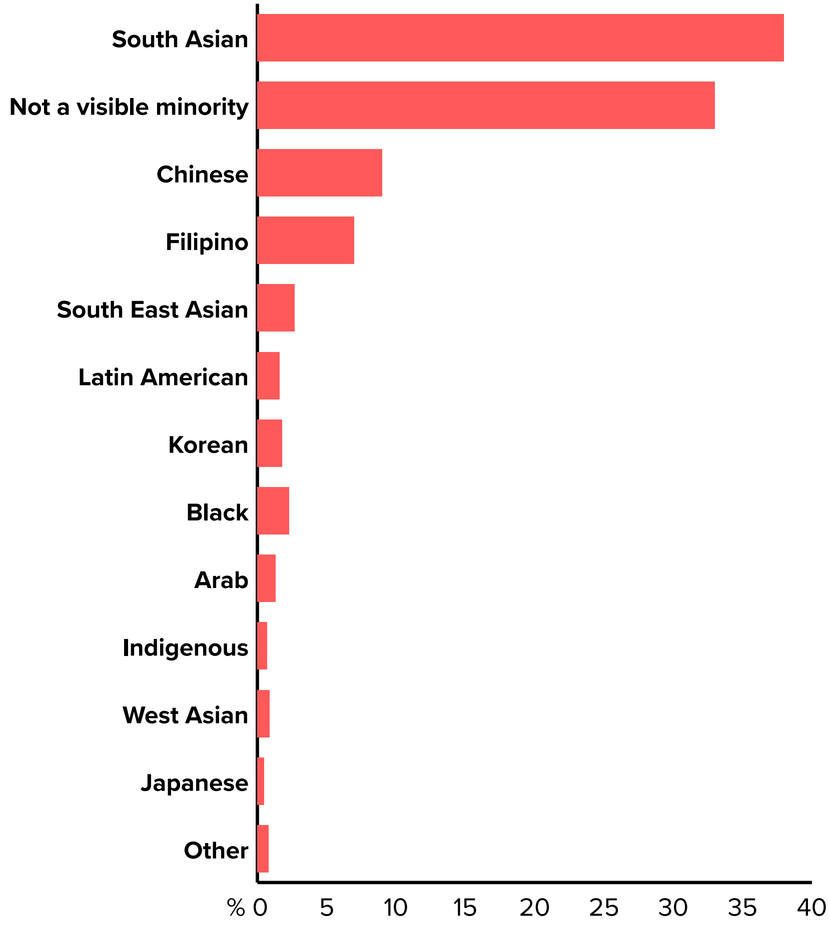
Self-Identified Groups (n=1679)



Respondents were asked to self-identify their ethnicity/race (Figure 10). Nearly half of participants identify primarily as Caucasian (49%), and over one fifth identify as South Asian (21%). Other groups captured by the data include Filipino (5%), Chinese (5%), Latin American (3%), Indigenous (3%), and Black (2%).

Source: Surrey Music Strategy Survey

FIGURE 11
2021 Census Demographics

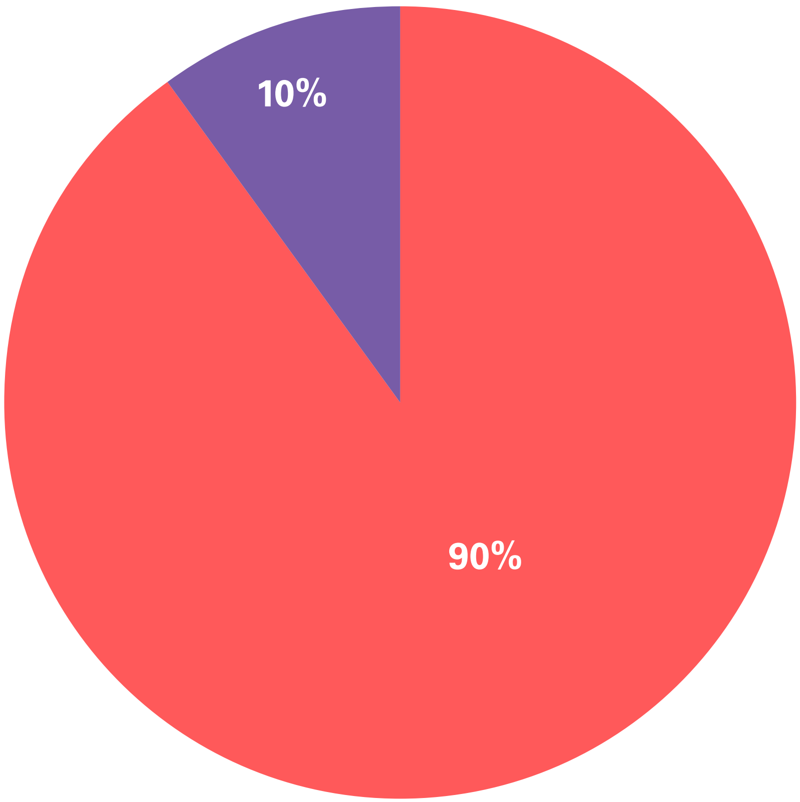


The results captured in the survey are comparable to the 2021 Stats Canada Census results (Figure 11). The Census results indicate that 33% of Surrey residents identify as "not a visible minority", 38% South Asian, 9% Chinese, and 7% Filipino. The survey collected slightly more responses from Caucasian individuals and there is some other variation (e.g., fewer responses from South Asian individuals, and more responses from 'other' and 'none of the above' options), but overall, the results are similar. In sum, the survey provides a realistic representation of Surrey's ethnographic makeup.

Source: Census Profile, 2021 Census - Surrey, City [Census subdivision], British Columbia and British Columbia [Province] (statcan.gc.ca)

FIGURE 12

Do you identify as someone with a disability? (n=1677)



In terms of additional self-identified characteristics, 10% of survey respondents identify as having a disability (Figure 12). These results indicate the need for music events in Surrey to remain welcoming and accessible for equity-deserving groups, including people with disabilities.

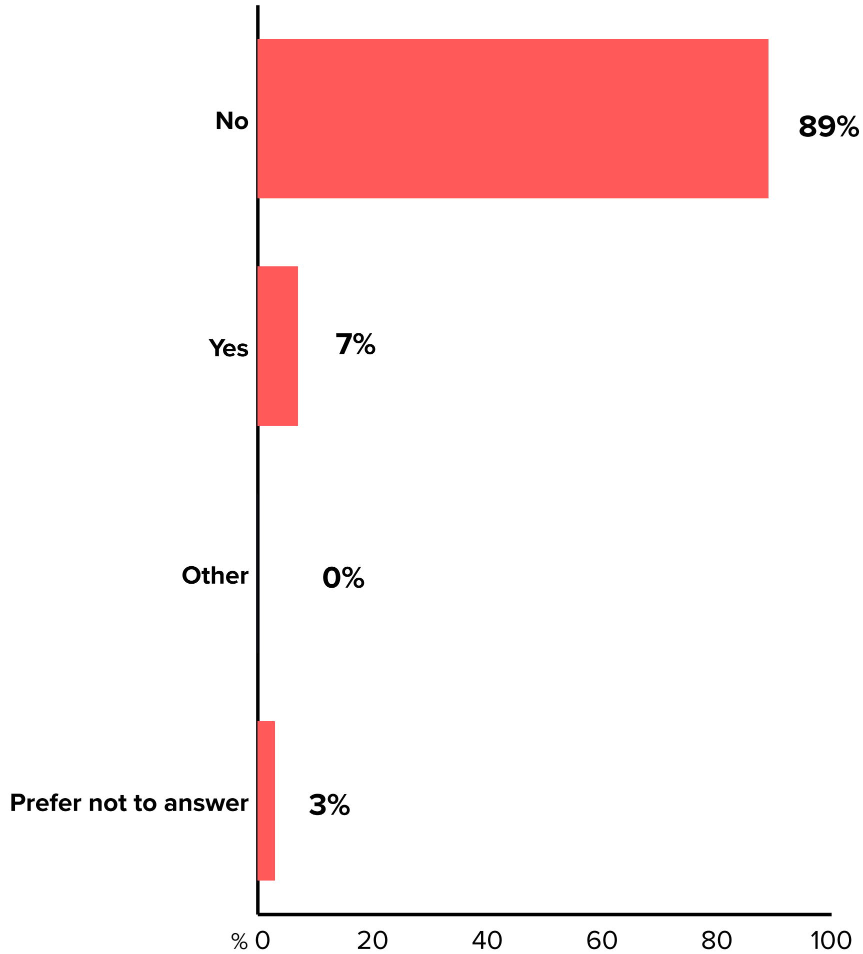
Source: Surrey Music Strategy Survey

Yes

No

FIGURE 13

Do you identify as a member of the 2SLGBTQIA+ community? (n=1673)



7% identify as a member of the 2SLGBTQIA+ community (Figure 13). These results indicate the need for music events in Surrey to remain welcoming and accessible for equity-deserving groups, including members of the 2SLGBTQIA+ community.

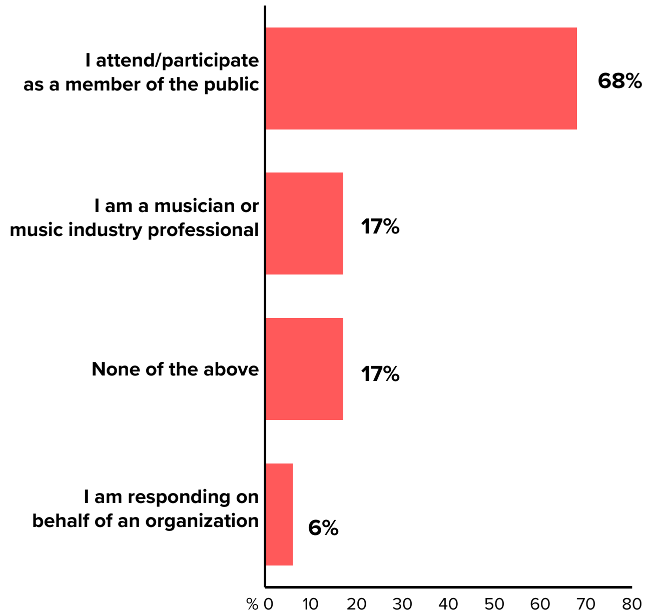
Source: Surrey Music Strategy Survey

Engaging with Music in Surrey

Survey participants engage with music in Surrey in a variety of ways. This section presents data related to how participants are involved with music in Surrey and questions regarding access to music in Surrey.

FIGURE 14

How do you engage with music in Surrey? (n=2389)

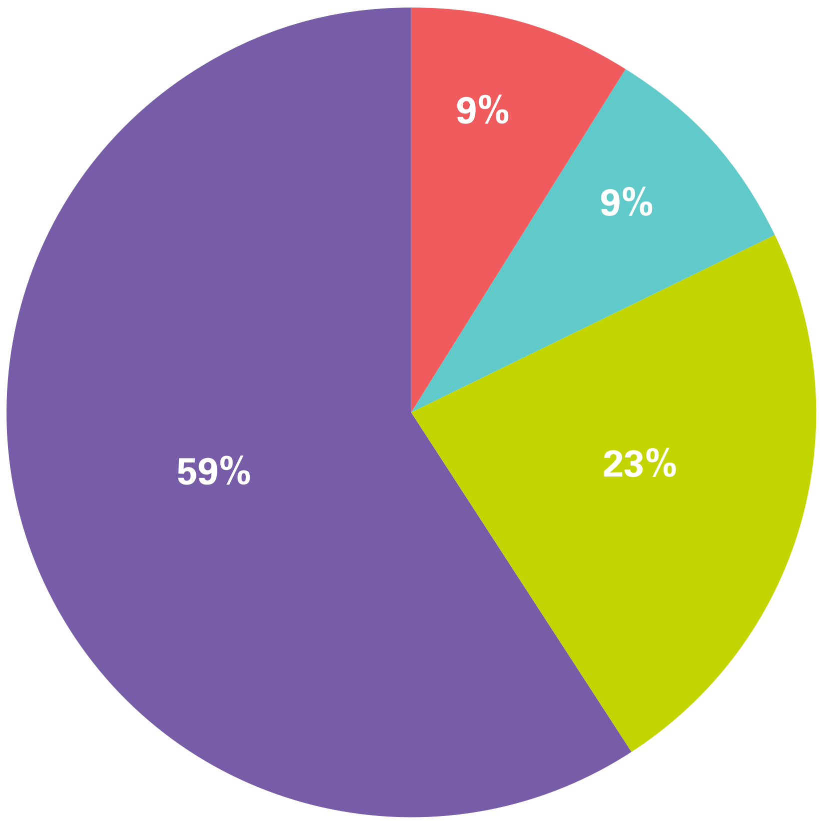


As portrayed in Figure 14, a large majority of survey participants attend or participate in music events in Surrey as members of the public (68%). This suggests that approximately 350,000 people living in Surrey engage with music. While other participants engage as musicians or music industry professionals (17%), an equal amount indicate none of the options provided applied to them (17%) (i.e., attending music events, being music industry professionals, or belonging to an organization). Participants might engage with music through other means such as listening to Surrey artists online, following artists' social media, taking music lessons etc.

Source: Surrey Music Strategy Survey, Musician and Music Business Database Intake Forms, Quick Polls from Party for the Planet and Surrey Steps Up Youth Event

FIGURE 15

As an individual, what is your main role in Surrey's music industry? (n=213)



Respondents who identified as music individuals in the Surrey music strategy survey were asked to further breakdown their main role in Surrey's music industry (Figure 15). The majority of participants are musicians (59%), while others work as freelancers or contractors in the music industry (23%).[13]

Source: Surrey Music Strategy Survey

[13] The majority of the limited cohort who identified as a freelancer or employee in the industry also responded on behalf of a business and were thus included in that analysis.

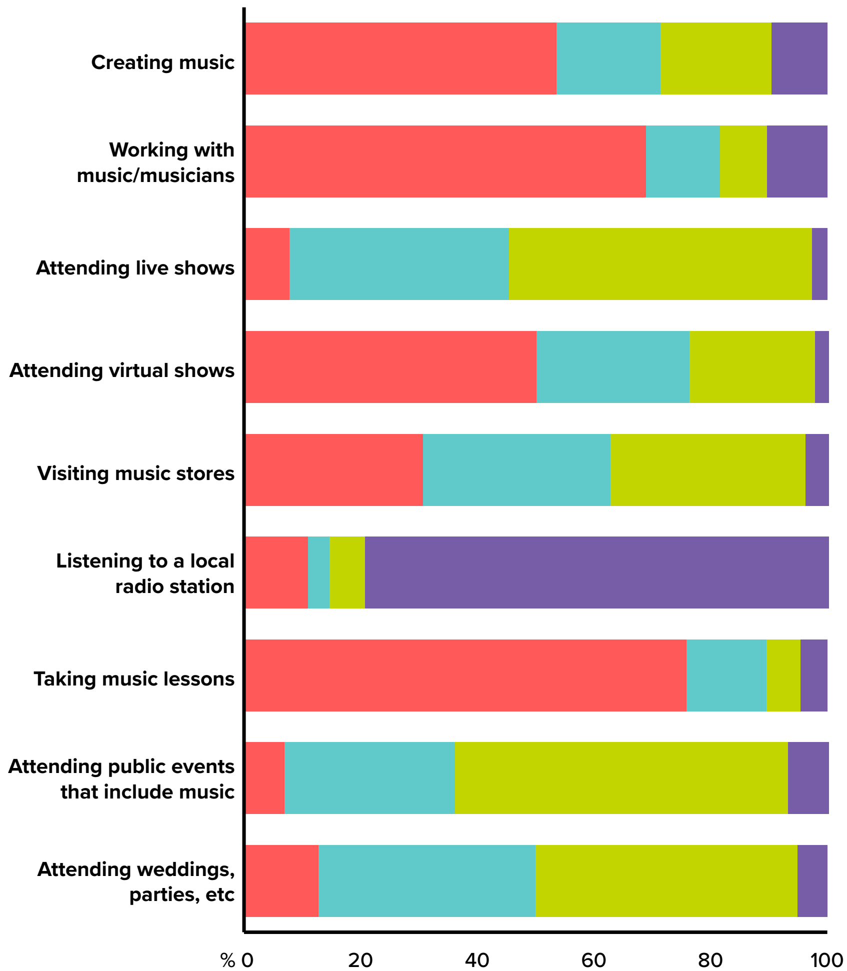
- **I am a musician**
- **I work as a freelancer/contractor in the music industry**
- **I am employed by an organization/company in the music industry**
- **Other**

Involvement with Music in Surrey

To assess involvement with music in Surrey, participants were asked the frequency and nature of their involvement in music activities, how they learn about music events, and where they attend music events. Participants also indicated their level of agreement with statements related to music in Surrey.

FIGURE 16

On average, how often in 2019 were you actively involved with music scene activities in Surrey? (n=1531)



Presented in Figure 16, participants were asked on average how often in 2019[14] they were actively involved with music activities in Surrey. The most frequent way that participants engaged with music was by listening to a local radio station. Almost two-thirds of participants report listening to a local radio station a few times a week (65%). The most common radio stations identified include: 94.5 Virgin Radio, Rock 101.1, 103.5 QMFM, CBC Radio, Jack 96.9, 93.7 JR Country, and 102.7 the PEAK.

Many participants also attended public events that included music (41%) and attended live shows every few months (40%). The least reported means of engaging with the music scene were taking music lessons and working with music or musicians. Two-thirds of participants never took music lessons (66%) and nearly the same share did not work with music or musicians (60%). Although not all participants engaged with music in the same way, most people were involved in Surrey's music scene in 2019. These results indicate an appetite for music activities.

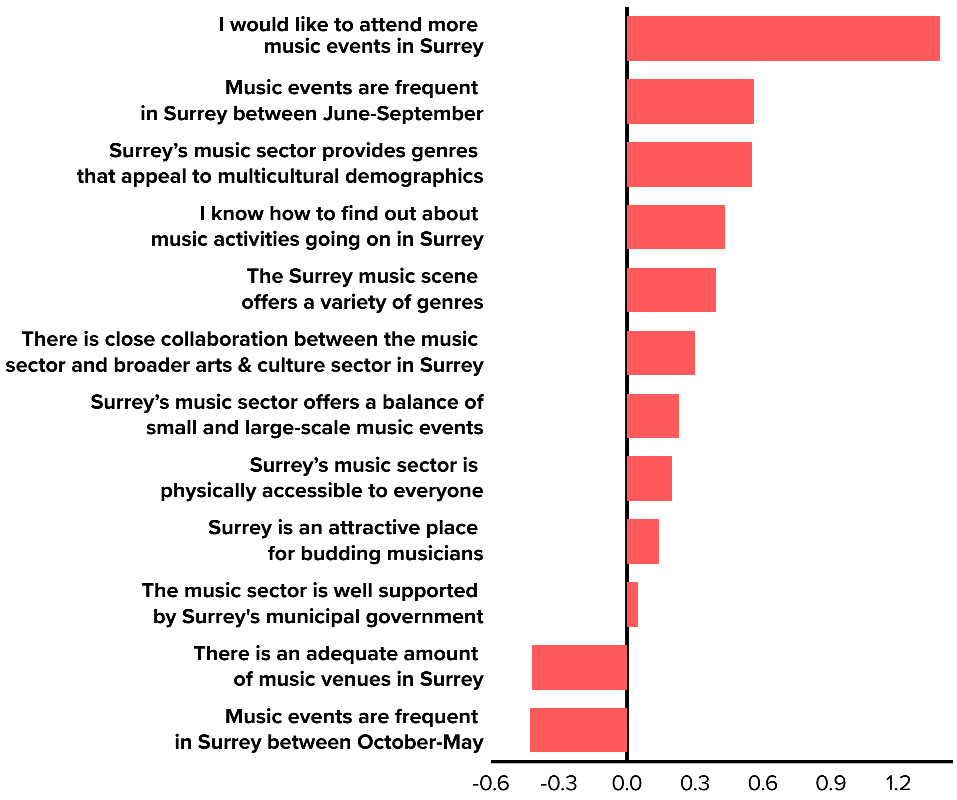
Source: Surrey Music Strategy Survey

[14] 2019 data was collected to give a glimpse of participation in Surrey's music industry prior to the COVID-19 pandemic.

- **Never/not applicable**
- **A few times a week**
- **Every few months**
- **Once a year or less**

FIGURE 17

Please rank your level of agreement with the following statements: (n=1419)



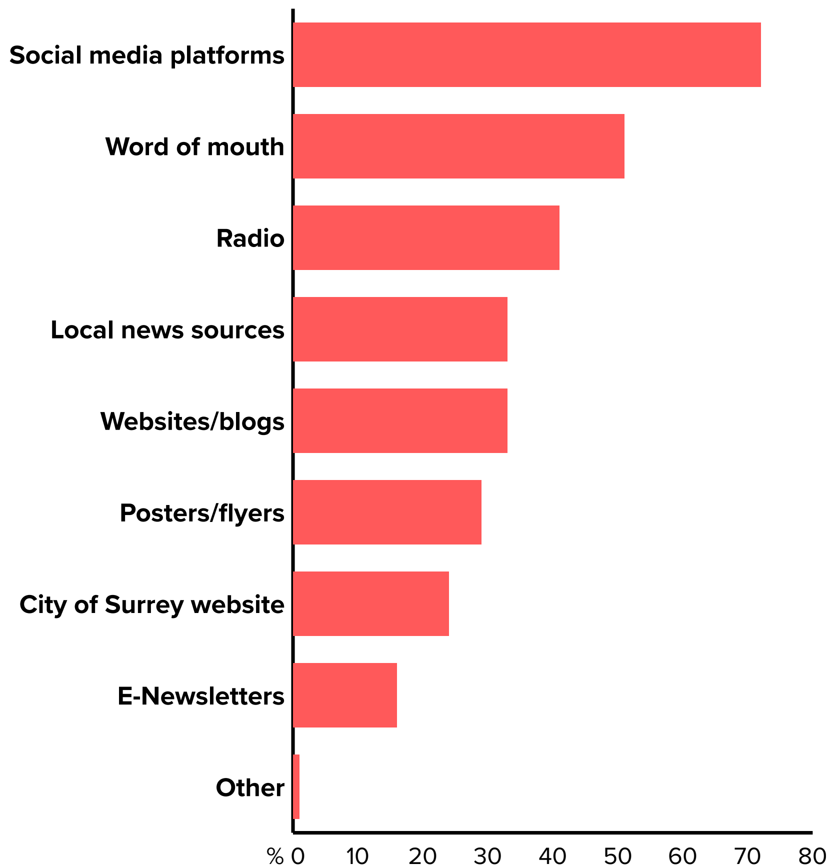
Survey participants were asked to indicate their level of agreement with a number of statements related to the music scene in Surrey (Figure 17). The majority of participants agree they would like to attend more events, indicating a popular interest in music in the city. Participants further agreed that music events in Surrey are frequent between June and September and that the sector provides genres that appeal to multicultural demographics. Furthermore, participants somewhat agree on knowing how to find out about music activities in Surrey while also agreeing on the inadequate amount of music venues in the city, as well as less frequent music events between October and May.[15]

Source: Surrey Music Strategy Survey

[15] Likert scale questions are calculated using a 'weighted average' on a scale of -2 (strongly disagree) to 2 (strongly agree).

FIGURE 18

How do you typically find out about music events in Surrey? (n=1525)



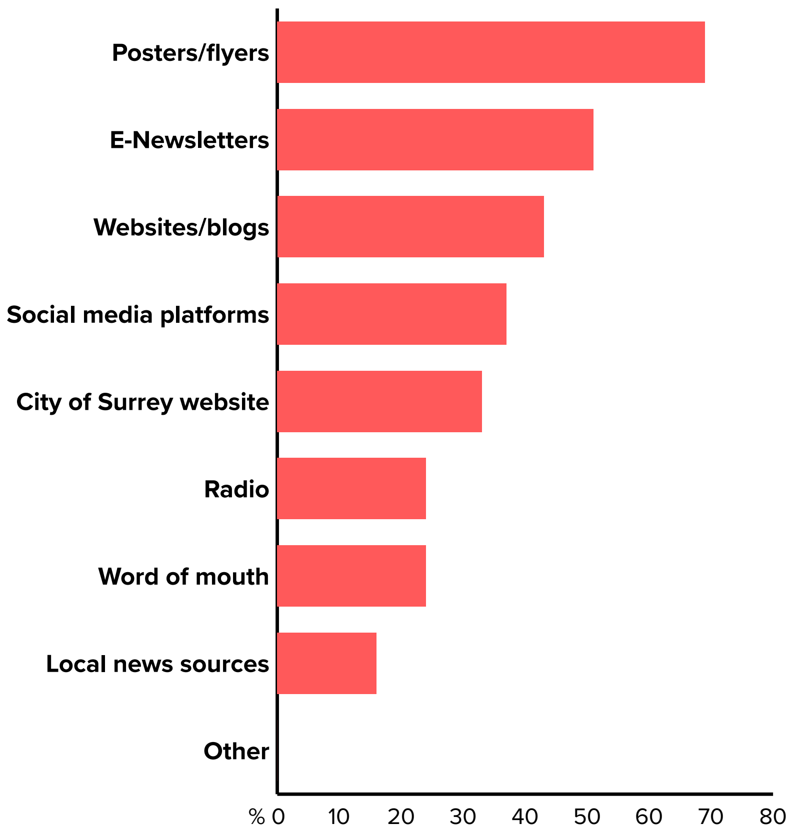
Participants indicated how they typically learn about music events in Surrey.

Figure 18 portrays the responses for the entire population. Significantly, almost three-quarters of participants hear about music events in Surrey through social media platforms (72%). Word of mouth (51%), radio (41%), local news sources (33%), and websites/blogs (33%) are other important channels through which participants learn about local music events. Participants also noted some additional sources such as bus signage, Spotify, and the Surrey Board of Trade.

Source: Surrey Music Strategy Survey

FIGURE 19

How do you typically find out about music events in Surrey? Indigenous Stakeholder Responses (n=49)



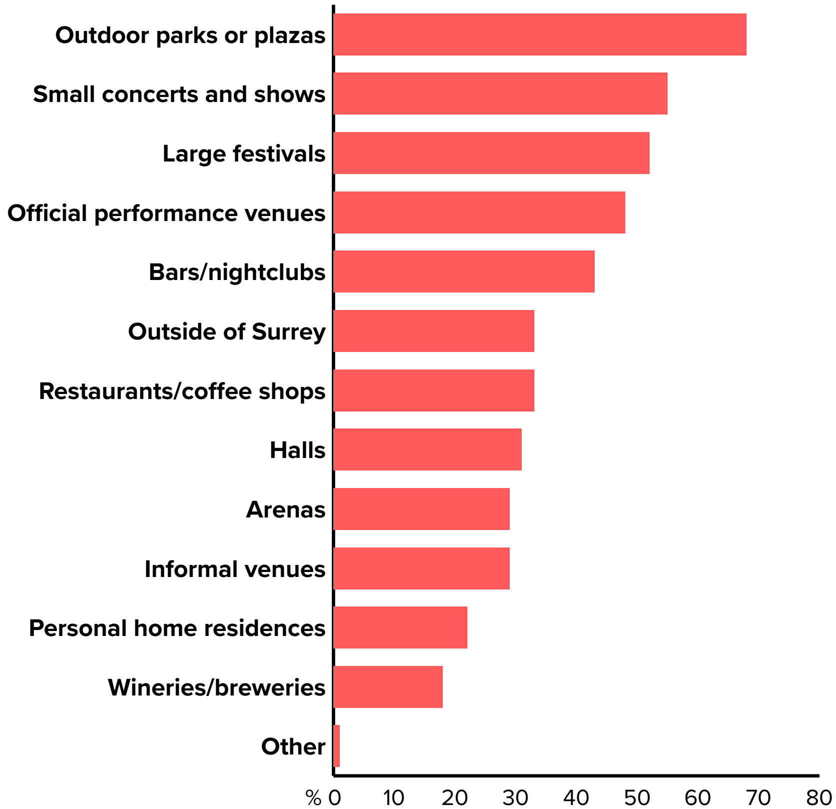
According to the survey results, social media is not the most important source for learning about music events for Indigenous stakeholders (Figure 19).

For this community, posters and flyers are the most important channel (69%), followed by e-newsletters (51%) and websites/ blogs (43%). These results demonstrate that communities rely on a range of mediums to learn about music events in Surrey. In order to attract a diverse audience and ensure a wider reach, there is a need to publicize music events happening in the city through a variety of channels.

Source: Surrey Music Strategy Survey

FIGURE 20

Where do you typically attend music events/activities in Surrey? (n=1474)



The survey solicited responses as to where participants typically attend music events or activities.

Figure 20 illustrates where the total population typically attends music events or activities in Surrey (these categories overlap, and participants were asked to multi-select). At over two-thirds of survey respondents, the largest share of participants attend events in outdoor parks and plazas (68%). Over half attend small concerts and shows (55%) and over half attend large festivals (52%). Notably, concerts in private homes are also quite significant (22%). This result is likely indicative of pandemic activity and may be here to stay. Wineries and breweries (18%) are also on the rise in Surrey, providing an evolving opportunity for performances. One-third of participants (33%) also indicated attendance of such events outside of Surrey (e.g., Vancouver, Abbotsford, Port Moody, Burnaby, Delta, New Westminster, and internationally). Overall, results portray that respondents attend music events across varied spaces.

Source: Surrey Music Strategy Survey

FIGURE 21

Where do you typically attend music events/activities in Surrey? Muscian Responses (n=181)

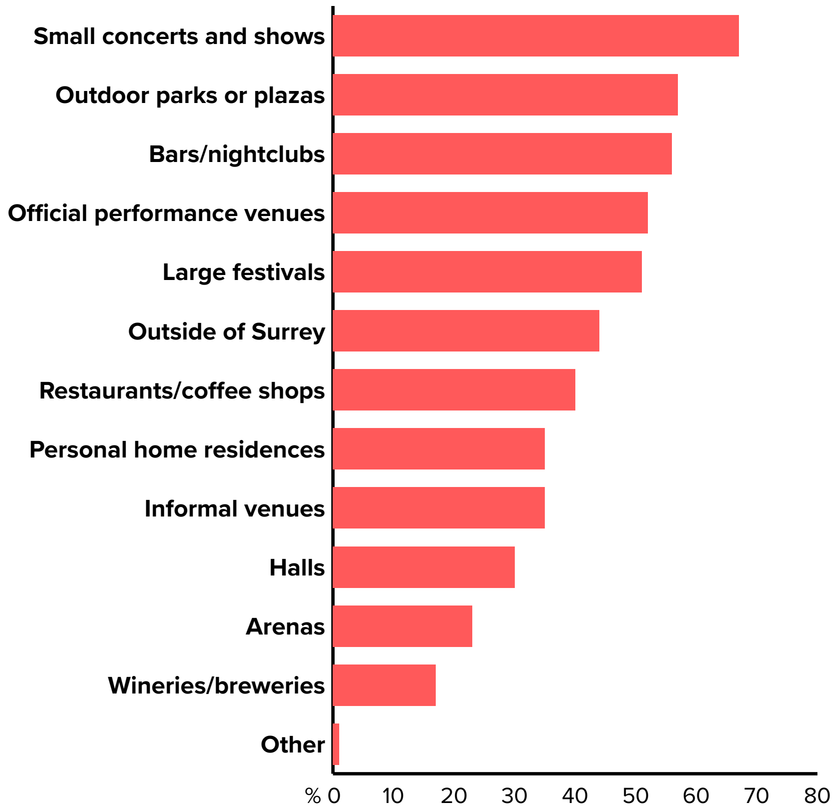
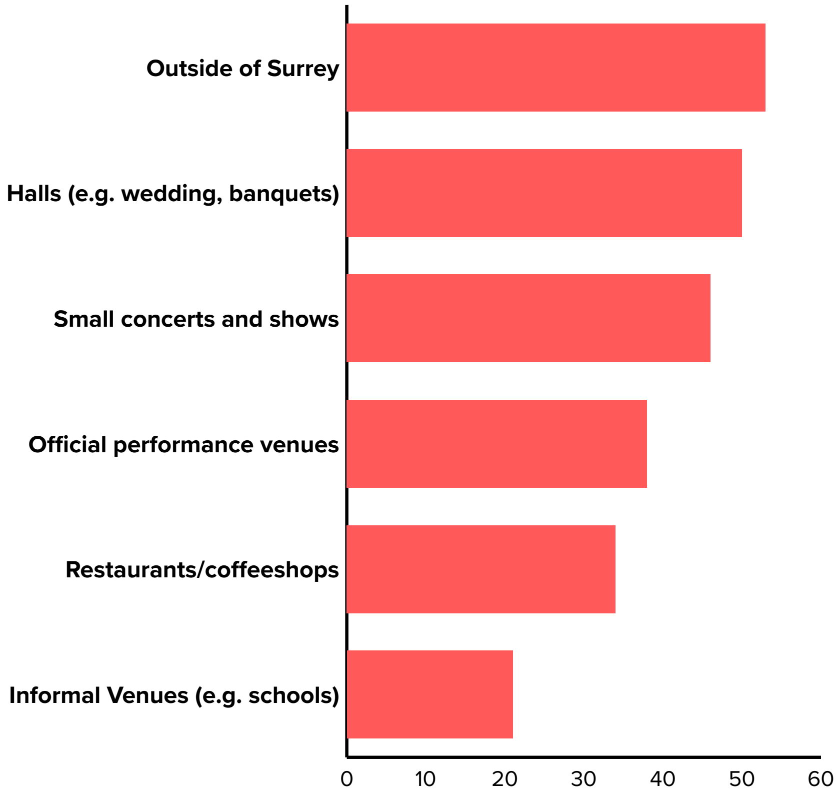


Figure 21 portrays where musicians typically attended music events in Surrey. Over two-thirds of musicians attend small concerts and shows (67%). Most musicians also attend events in outdoor parks and plazas (57%), bars/night clubs (56%), official performance venues (52%), and larger festivals (51%).

Source: Surrey Music Strategy Survey

FIGURE 22

Where do you typically attend music events/activities in Surrey? South Asian Stakeholder Responses (n=352)



Survey results indicate that most South Asian respondents travel outside of Surrey to attend music events (53%), indicative of there not being a satisfactory music 'offer' for such community members within Surrey's borders. In terms of attendance in Surrey, South Asian respondents typically attend Surrey music events in outdoor parks or plazas (53%), as well as events in halls (e.g., weddings and banquets) (Figure 22).

Source: Surrey Music Strategy Survey

FIGURE 23

Where do you typically attend music events/activities in Surrey? Indigenous Stakeholder Responses (n=49)

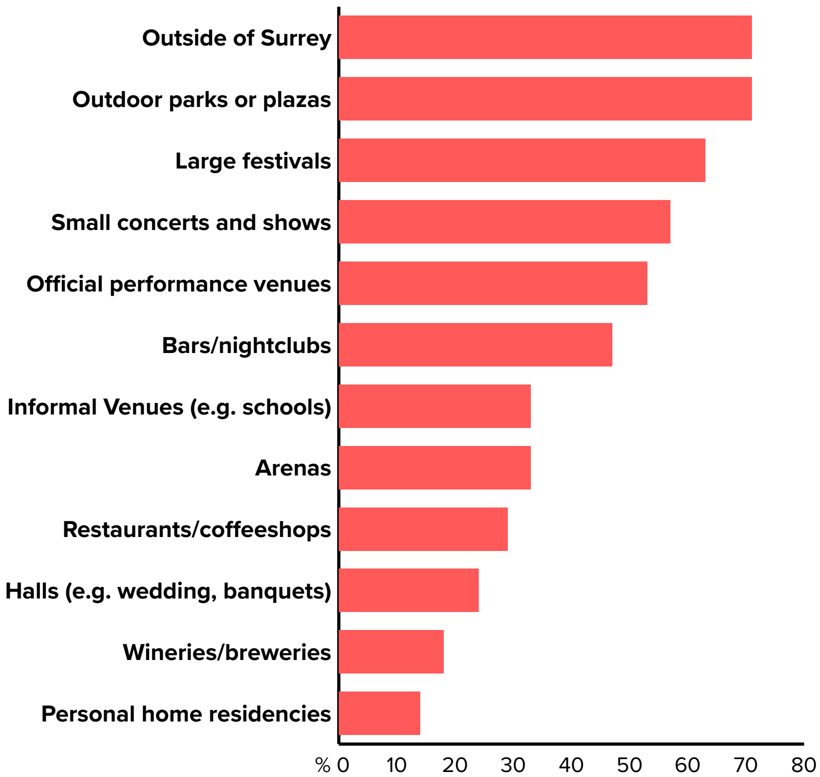


Figure 23 portrays a similar story related to Indigenous engagement – i.e. many Indigenous participants attend music events outside of Surrey (71%). Many Indigenous participants also attend events occurring in outdoor parks and plazas (71%), as well as at large festivals (63%).

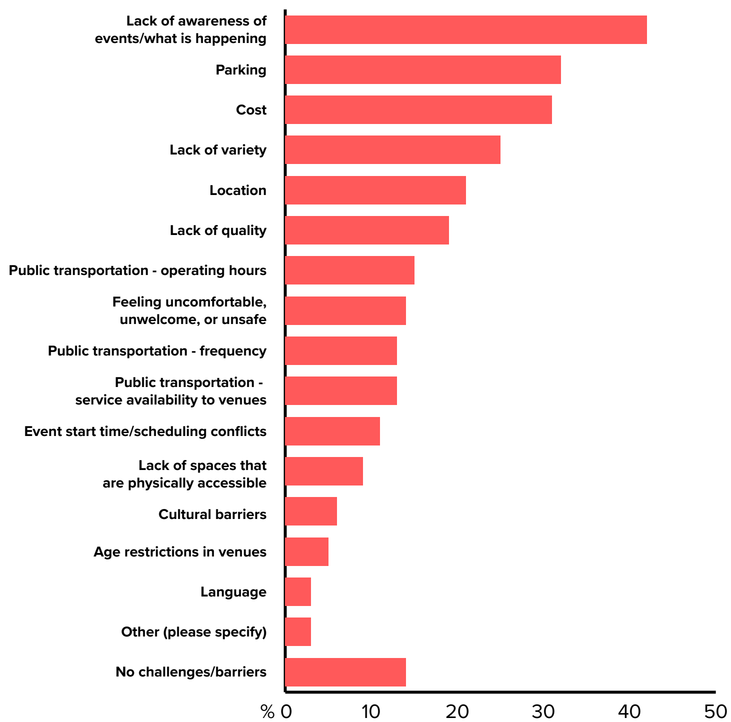
Source: Surrey Music Strategy Survey

Access to Music

The survey sought to understand the factors that prevent communities and individuals from accessing music in Surrey, as well as factors to prioritize in growing the music industry in Surrey. Questions relate to challenges, priorities, and means of transportation.

FIGURE 24

What challenges or barriers have you experienced while accessing music in Surrey, if any? (n=1451)



Survey participants were asked what challenges or barriers they experience while accessing music in Surrey (Figure 24). Many participants point to the lack of awareness of events happening in the city (42%). However, the findings indicated in Figure 24 suggest that participants agree on knowing how to find out about music events in Surrey. These findings imply that residents tend to be aware of flagship events organized by the City, but perhaps not the smaller events organized by music individuals and organizations.

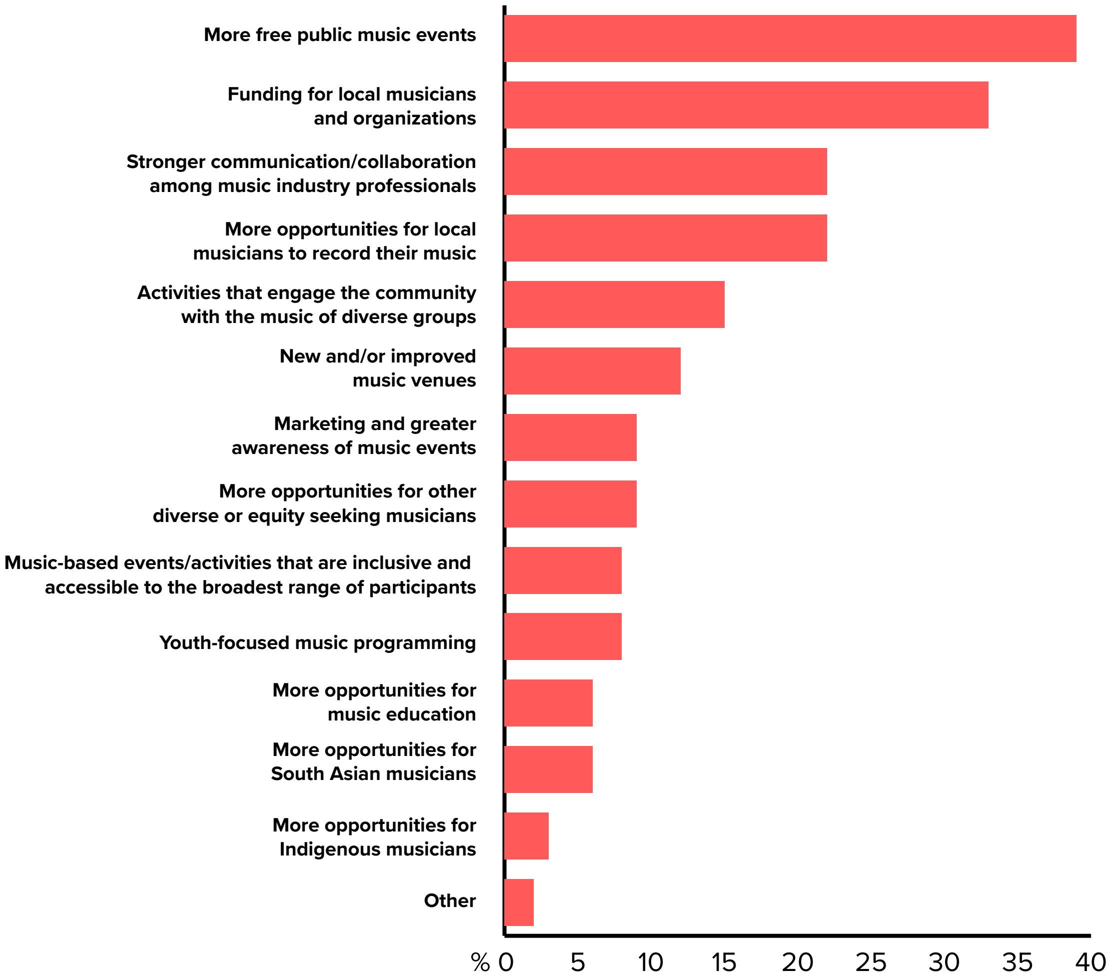
Other participants observe limited parking (32%) and high costs (31%) as the predominant barriers to accessing music in Surrey. Other challenges expressed by participants include the lack of clean and accessible restrooms during public events, COVID-19 related requirements (e.g. vaccine passports), and a lack of accessibility for people with disabilities (e.g. many performances are not compatible with hearing aids). However, 14% of participants noted that they face no challenges or barriers in accessing music in Surrey.

Notably, the quick polls from Party for the Planet and Surrey Steps Up Youth Event portray public transportation (100%), parking (72%), and location (60%) as main challenges to accessing music in Surrey. These findings corroborate the survey results.

Source: Surrey Music Strategy Survey

FIGURE 25

What do you think should be prioritized in developing the music scene/sector in Surrey? (n=2380)

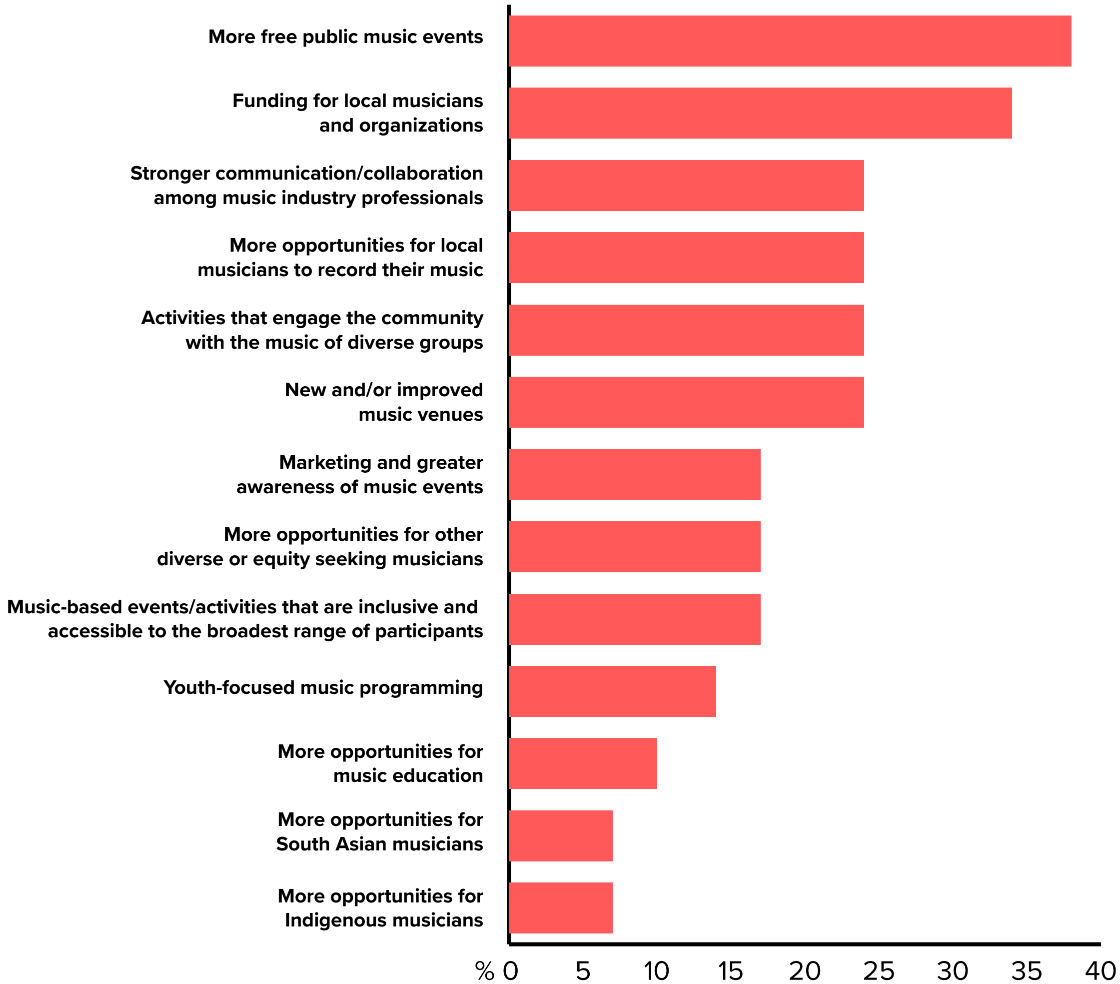


Participants were asked what the priorities should be in terms of developing the music scene/sector in Surrey (Figure 25). The top priorities for participants are the need for more free public events in the community (39%) and new and/or improved music venues (33%). The results reveal that other priorities in Surrey should be developing music-based activities that are inclusive and accessible to the broadest range of participants (22%) and improving marketing and promoting awareness of music events (22%).

Source: Surrey Music Strategy Survey, Musician and Music Business Database Intake Forms, Quick Polls from Party For the Planet and Surrey Steps Up Youth Event

FIGURE 26

What do you think should be prioritized in developing the music scene/sector in Surrey? Black Stakeholder Responses (n=29



Beyond the need for more free public music events in Surrey (38%), participants from the Black stakeholder community noted the need to prioritize funding for local musicians and organizations (34%), suggesting the limited availability of funding specific to Surrey-based artists including the Black community (Figure 26). The community also noted the need for building a stronger community/collaboration among music industry professionals (24%) as a key priority.

Source: Surrey Music Strategy Survey

FIGURE 27

Which means of transport do you typically use to access music entertainment outside of your home? (n=1475)

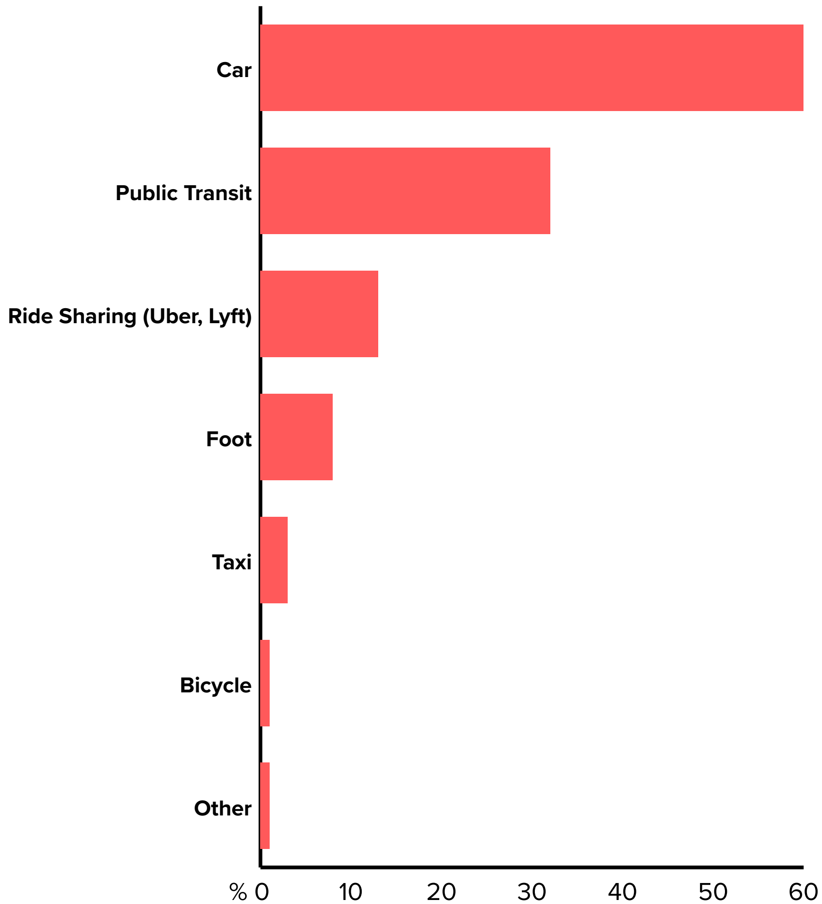
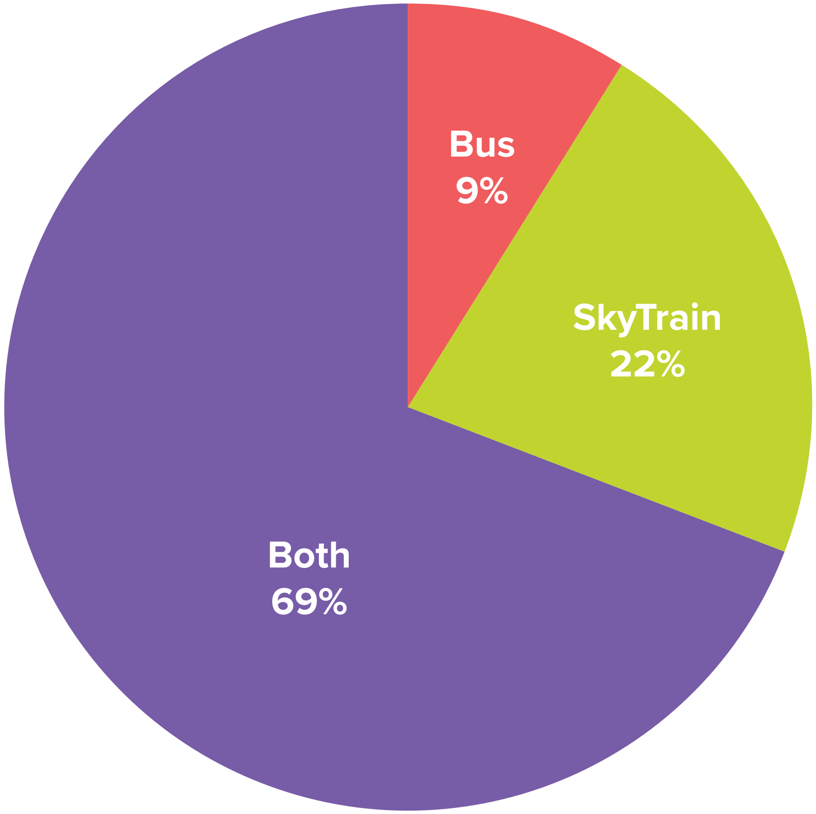


Figure 27 portrays the means of transportation typically used to access music entertainment outside of participants' homes. The most-used method of transport is to travel by car (60%). Many participants use public transit (32%) and ride sharing services such as Uber and Lyft (13%). Overall, responses indicate that private/semi-private means of transportation (i.e. car and ride sharing) is favoured over public transit. This finding supports the limited availability of public transportation (i.e. operating hours and frequency) identified as a main barrier to accessing music in Surrey.

Source: Surrey Music Strategy Survey

FIGURE 28

If public transit selected = specify bus, skytrain or both (n=63)



Participants who travel to music events via public transit (32%) report using both the SkyTrain and the bus (69%) (Figure 28).

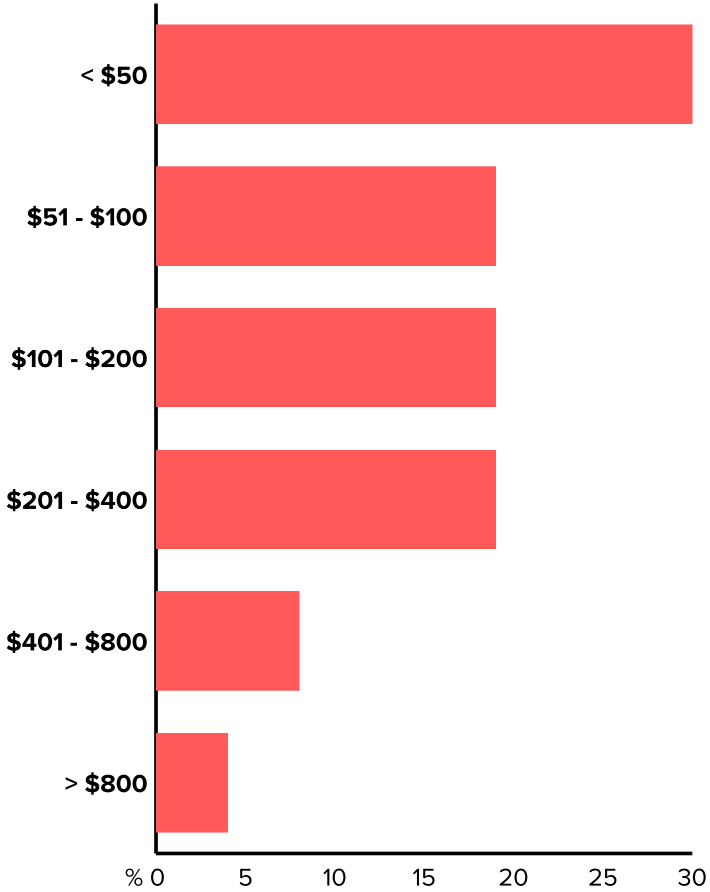
Source: Surrey Music Strategy Survey

Economic Activity

The survey asked participants questions related to their economic activity surrounding music activities. Economic activity, specifically direct spend by the public before and after music related activities brings business to the entire community.

FIGURE 29

In 2019, approximately how much did you spend participating in music activities in Surrey? (e.g. tickets to events/shows/festivals, refreshments, merchandise during the event) (n=1353)



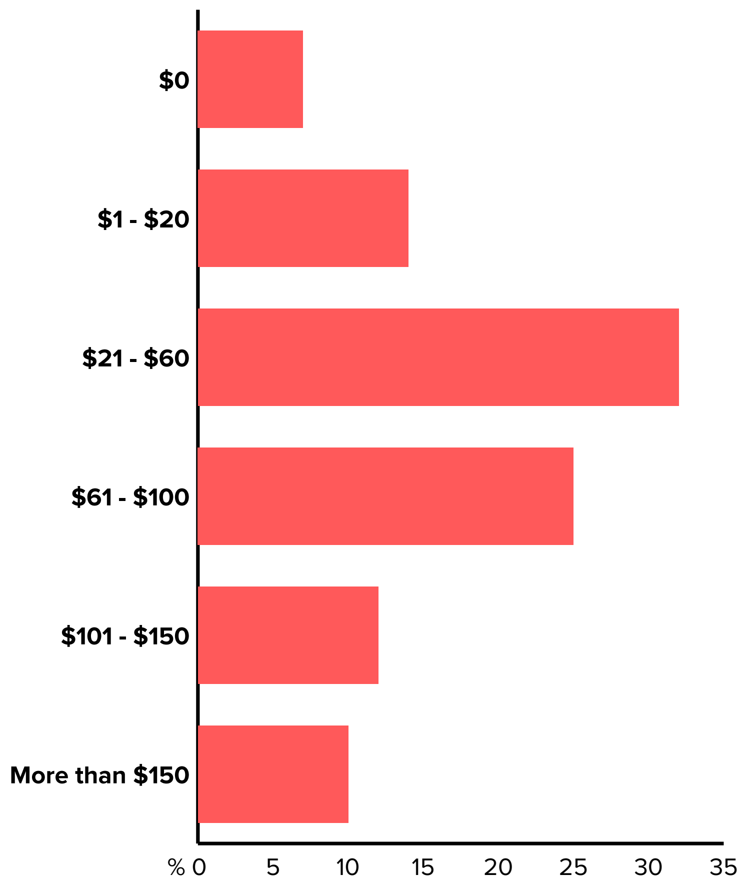
Survey results indicate that on average, participants attended six music events in Surrey in 2019.[16] Participants were asked how much they spent participating in such music activities (Figure 29). Most participants (49%) spend up to $100 per music event. Many participants were also willing to spend between $51 and $400, indicating a wide range of willingness to pay and an appetite for a variety of types of music events.

Source: Surrey Music Strategy Survey

[16] 2019 data was collected to give a glimpse of economic activity related to Surrey's music industry prior to the COVID-19 pandemic.

FIGURE 30

On average, and as an individual, how much do you typically spend, before/after participating in a music event (e.g., accommodation, shops, restaurants, transportation) (n=1360)



Participants were also asked how much they typically spend before/after participating in music events (Figure 30). Most people spend between $21-$60 (32%) and $61-$100 (25%) on accommodation, restaurants, and transportation. Considering that the majority of survey respondents reside in Surrey (84%), it is unlikely that participants are spending on accommodation.

Source: Surrey Music Strategy Survey

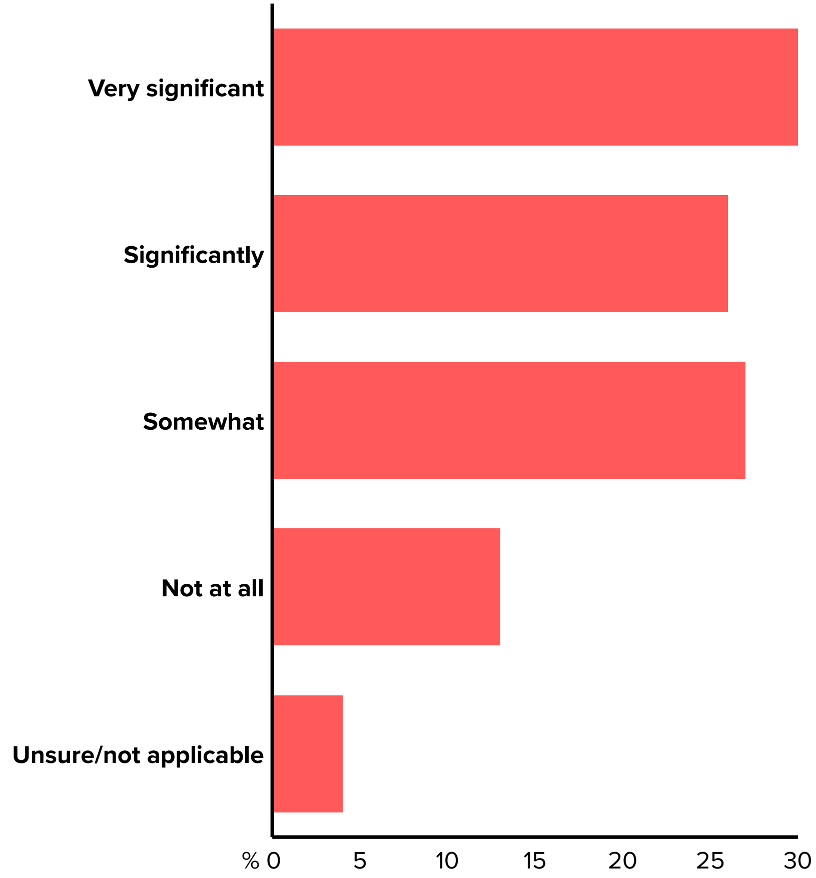
Impacts of COVID-19

The COVID-19 pandemic impacted all sectors, including closures and cancellation of music events and activities.

FIGURE 31

How have music event and activity closures/ cancellations due to COVID-19 negatively impacted you? (n=1698)

All participants were asked how such closures/cancellations negatively impacted them (Figure 31). About a third of participants were very significantly impacted (30%), while others were significantly (26%) or somewhat (27%) impacted. Only 13% reported no negative impact of the pandemic. Some of the major impacts noted include hindrances to audience and career growth opportunities, as well as loss of income. Furthermore, the inability to participate in music activities limited participants' connection to community, and in some cases, induced anxiety and associated issues. Other impacts on participants include job losses and social isolation.



Appendix B

Surrey Music Strategy Interviewees

Table 4 - List of External SMS Interviewees

Name	Title	Organization
Amarjeet Singh	Director/President	Naad Arts Centre
Anesh Mattu	Event Promoter and Musician	Independent
Ange Chew	Executive Director	Discover Surrey
A-SLAM (Hussein)	DJ and Musician	Independent
Brian Dupas	CEO	Roland Canada
Chief Harley Chappell	Chief	Semiahmoo First Nation
Chris Friesen	Store Manager	Long and McQuade
Dal Hothi	Musician	Independent
Dione Constanzo	Manager	Penmar Arts Centre
Ellen Farrugia	President, Board of Directors and Musician	Surrey City Orchestra
Intense	Musician	Intense Global
Jeremy James Lavallee	Musician	Independent
Jodi Proznick	Musician	Co-Artistic Director of Music Arts Collective
Joel Stobbe	Artistic Director	Surrey Youth Orchestra
Justin Wachtel; Soliven; Azel; Neeko	Musician	Manila Grey
Karan Mattu	DJ and Drummer	Independent
Kevin Williams	CO-Founder & COO	Sessionwire
Lindsay MacPherson	Executive Director	Music BC Industry Association
Max Cunningham (Ludic)	Musician	Independent
Pat Chessell	Musician	Independent
Ranj Singh	Musician	Independent
Ravi Sanghera; Jim	Entertainment Bookers	Aria Banquet Hall
Susan Smith Alexander	Senior Director, Programming	Arts Umbrella

Table 5 - List of Internal Staff Interviewees

Name	Title	Department
Alieen Murphy	Social Planner	Planning and Development
Laurie Cavan	General Manager	Parks, Recreation, and Culture
Liane Davison	Manager of Culture	Parks, Recreation, and Culture
Ron Gill	Manager of Area Planning and Development	Planning and Development
Stephen Wu	Manager of Economic Development	Investment and Intergovernmental Relations
Yalda Asadian	Community Enhancement Manager	Parks, Recreation, and Culture

Appendix C

Surrey Music Strategy Focus Group Members

Table 6 - List of SMS Focus Group Members

Name	Title	Organization
Andrew Elliot	Associate Theatre Manager: Client and Audience Services	Bell Performing Arts Centre
Anita Huberman	President & CEO	Surrey Board of Trade
Bonnie Burnside	Manager	Downtown Surrey BIA
Brenda Grunau	Manager, Music Programs	Creative BC
Elizabeth Yih	Investment Promotions Specialist	City of Surrey
Ellen Farrugia	President, Board of Directors	Surrey City Orchestra
Germaine Langan	Indigenous Event Organizer and Programmer	Independent / City of Surrey Indigenous Consultant
Gordon Cobb	Digital Content Producer, Office of the Provost Faculty, Music Department	Kwantlen Polytechnic University
Jaime Williams	Marketing Project Director	Concord Pacific Developments Inc.
Jenna Kuzemski	Senior Marketing & Events Specialist Project Lead, Surrey Music Strategy	City of Surrey
John Donnelly	Vice-President	MRG Events Ltd.
Kelly Breaks	Owner	Blue Frog Studios
Kent Gallie	Manager, Performing Arts	City of Surrey
Kulwinder Sanghera	Owner	REDFM

Name	Title	Organization
Lindsay MacPherson	Executive Director	Music BC Industry Association
Mary Rukavina	Manager, Special Events and Filming	City of Surrey
Nate Sabine	Director of Business Development	This is Blueprint
Navreet Dhaliwal	Marketing Lead	Face the Music Entertainment
Patrick Onukwulu	CEO & Artistic Director	Festival African Heritage Music and Dance Society
Philippe Pasquier	Associate Dean Academic, Faculty of Communication, Arts and Technology	Simon Fraser University
Rob Calder	Owner	Secret Study Projects
Ryan Balaski	VP, Festivals - Canada	Live Nation
Sami Ghawi	Director	FUSIONpresents Artist Marketing & Development Intl Ltd.
Shelley Boyd	Associate Dean, Faculty of Arts	Kwantlen Polytechnic University
Stuart Martin	Music Director and Conductor	Surrey City Orchestra
Tarun Nayer	Director, Founder	5x Fest, Snakes & Ladders
Yalda Asadian	Manager, Community Enhancement	City of Surrey

Appendix D

Surrey Music Strategy Economic Impact Assessment

The purpose of this industry profile and economic analysis section is to present findings on the composition of Surrey's music sector and gain insight into its impact on the economy. All economic stats and findings used a base year of 2019, which was the most recent year where the music industry was not impacted by the COVID-19 pandemic.

Economic impact looks at the following areas of the music economy:

- **Direct economic impact** refers to the impact in terms of labour income, GDP, and employment created directly from music related activities. The GDP figure is estimated by combining the amount spent on Surrey-based labour and aggregate operating profit margins. Direct impact includes all direct effects that music-related activity has on the region due to the operations of related organizations and individuals (e.g. a concert attendee buys a ticket to a show).

- **Spin-off economic impact** includes:

    - **Indirect impacts** are the value of music industry's purchasing inputs from other industries (e.g. a music venue purchases cleaning services from a supplier).

    - **Induced impacts** arise when households re-spend their income throughout the wider economy (e.g. a music business employee buys groceries).

Note, Nordicity collected the data inputs through multiple channels, including Surrey's musician database (159 responses), the music business database (64 responses), and the overall Surrey Music Strategy survey (specifically 181 responses from musicians and 134 from music businesses). These primary collection sources were bolstered by desk research such as online listings, to better estimate the total size of the music industry (or universe) in Surrey.[17]

The Underground Music Economy

Nordicity has found that there is little work available in terms of a strong quantitative methodology to measure this subset. Most of the research available is focused on socio-economic or socio-cultural impact of underground/night-time economies. Evaluation methods suggested in literature include: measuring social variables (i.e. crime), increased operation hours of live venue spaces, or time frames/durations of individuals staying out late in a city. Pursuing a more fulsome EIA that includes scope for trying to measure the underground economy and make projections could be valuable.

[17] 'Music universe' refers to identification and classification of all the various sectors within the music industry in order to approximate the number of musicians and music businesses found in Surrey.

Key Findings

Key industry profile findings are highlighted below:

- **35% of business** respondents have operated for **10+ years**, and **56% identify operating their businesses from home/online**.
- When identifying **changes in revenue during COVID-19, 29% of business respondents** indicated either being impacted **significantly (a decrease of over 75%), or not at all (32%).**
- **56% of musician** respondents have operated for **10+ years,** but **41% self-identify as mid-career artists.**
- **32% of musician respondents reported a decrease of over 75% in revenues during COVID-19.**

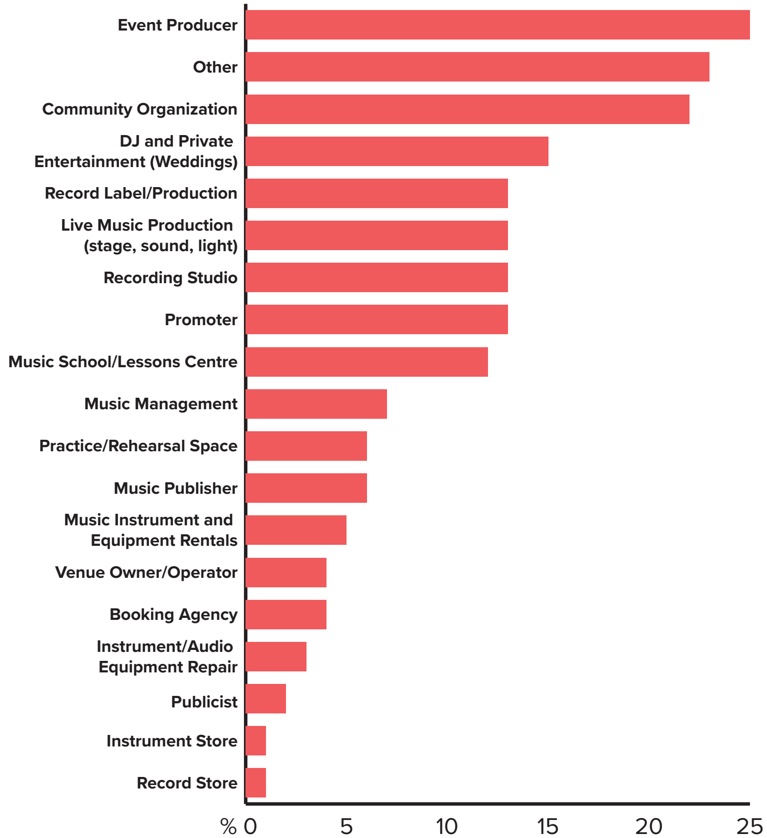
Music Business Profile

Using the North American Industry Classification System (NAICS) listed in Appendix D.1, Nordicity identified approximately **180 music businesses**, see Appendix D.2 (excluding live music venues and festivals in Appendix D.3). Comparatively, The City of Victoria identified a total of 134 music businesses in the Victoria Music Strategy.[18]

Through the music business intake form and Surrey Music Strategy survey, music businesses were asked a variety of profiling questions to develop an industry profile.

[18] City of Victoria. Victoria Music Strategy 2022-2026

FIGURE 32
What type of service do you provide as a music business? (n=134)

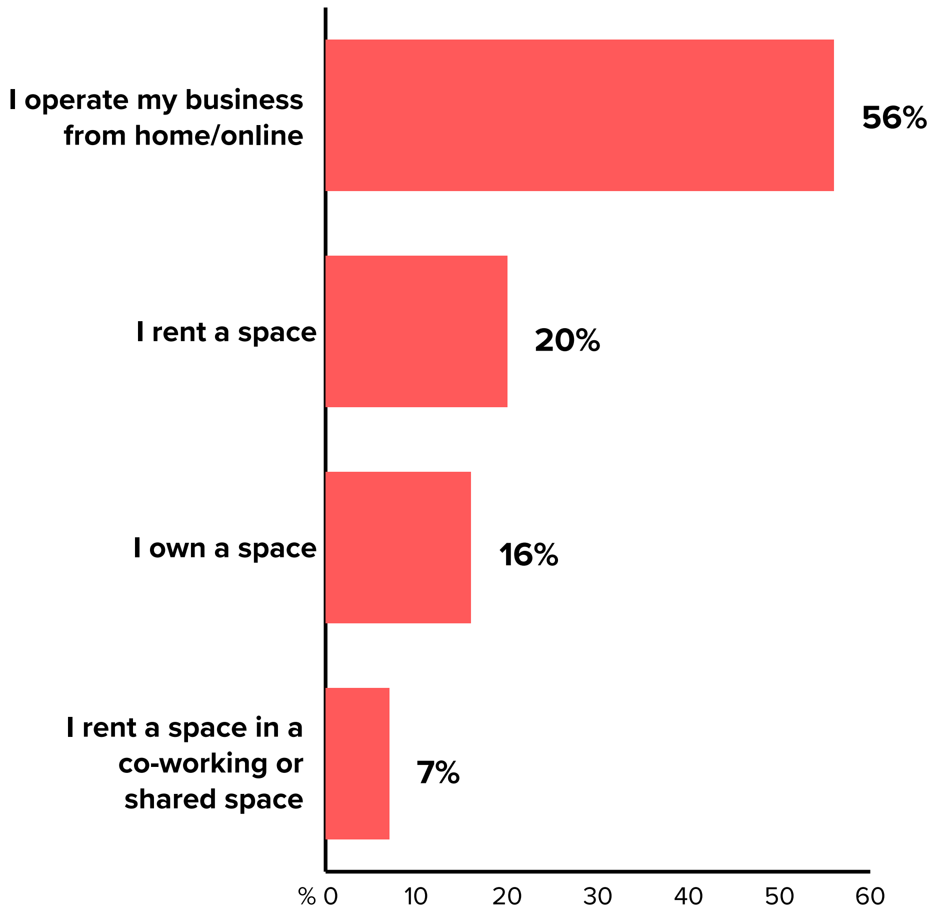


As seen in Figure 32, the largest share of respondents were event producers (25%) and community organizations (22%). Several respondents also indicated other (23%), which includes instrument design, manufacturing, and composing.

Source: Surrey Music Strategy Survey and Music Business Database Intake Forms

FIGURE 33

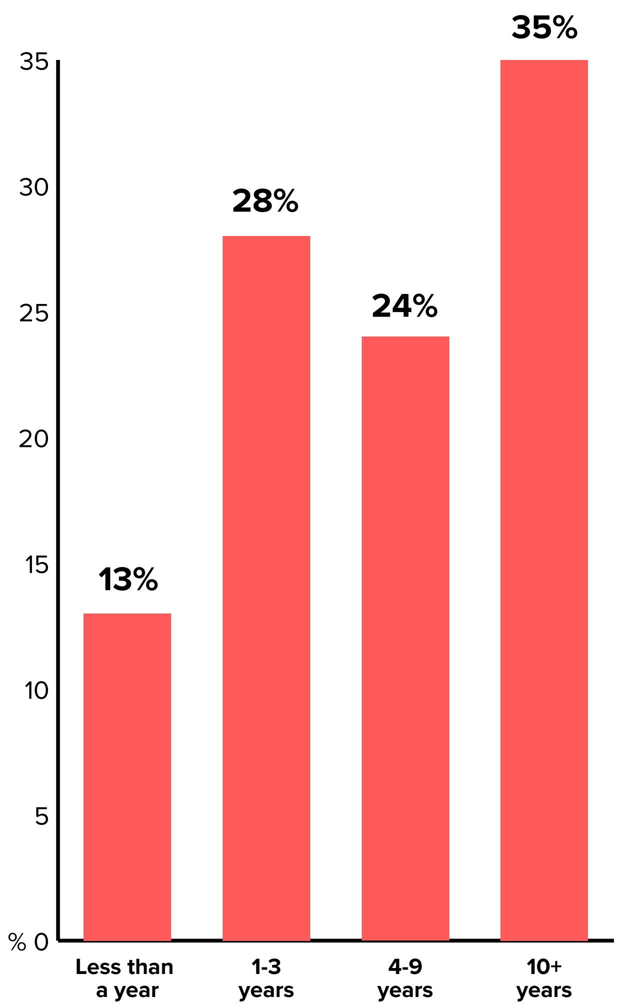
Which of the following best describes your situation? (n=134)



Notably, the majority of businesses reported operating from home or online (56%), while a smaller share rent (20%) or own a space (16%) (Figure 33). This finding could be indicative of a lack of available and affordable space in Surrey, as explored in other sections.

Source: Surrey Music Strategy Survey and Music Business Database Intake Forms

FIGURE 34
How many years has your organization been established? (n=134)



As visualized in Figure 34, over one third of organizations have been established for more than 10 years (35%) while others are between 1 and 3 years (28%) and 4 and 9 years (24%). The results indicate that a substantial portion of the industry are mature enterprises.

Source: Surrey Music Strategy Survey and Music Business Database Intake Forms

FIGURE 35
How would you describe your business? (n=134)

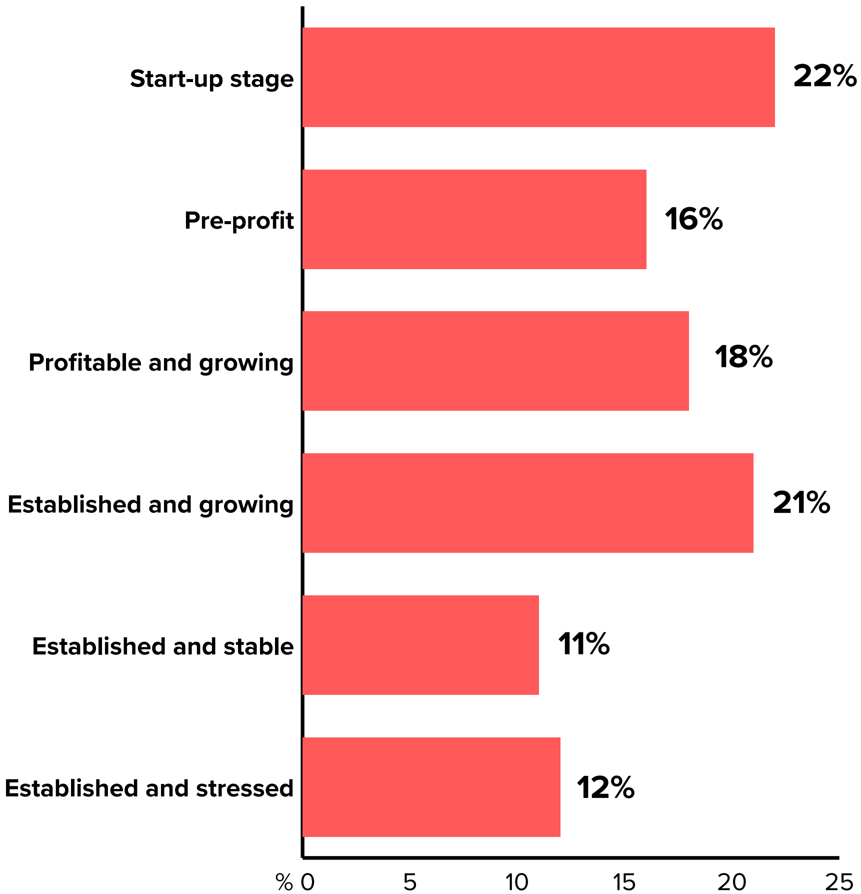


Figure 35 illustrates the various stages of music businesses in Surrey. While 22% of music businesses are in the start-up stage, a similar percentage (21%) are established and growing. Overall, music businesses in Surrey span widely across the different stages.

Source: Surrey Music Strategy Survey and Music Business Database Intake Forms

Employment

As tabulated below, music businesses reported that they employ an **average of 3.5 full-time and 1.5 part-time salaried employees**. They also augment their workforce with an average of 4 temporary/contract workers and an average of 8 volunteers.

Table 7 - Average Number of Employees (n=58)

Employee Type	Average Number of Employees
Full-time, regular salaried employees	4
Part-time, regular salaried employees	2
Temporary/contract employees	4
Volunteers	8

Source: Surrey Music Strategy Survey

Table 8 - Identity of Workforce (n=58)

Identification	Percent of Workforce	National Population
Female	23%	51%
LGBTQ2S+	7%	4%
Indigenous	2%	5%
Visible minority	11%	27%
Under 35 years old	18%	41%
People with disabilities	5%	7%

Table 8 illustrates workforce diversity in the sector. The findings reveal a higher proportion of LGBTQ2S+ than the national population[19] but a lower representation of other populations.

Source: Surrey Music Strategy Survey

[19] https://www150.statcan.gc.ca/n1/daily-quotidien/210615/dq210615a-eng.htm,

Music Business Impact

The survey identified an **average revenue of $306,000**, totaling more than $55M in total revenue generated by Surrey music businesses in 2019. Notably, this average revenue is high compared to an approximate average of $287,000 for music businesses at the provincial level for British Columbia.[20] As visualized below, the majority (55%) of businesses reported less than $25k in revenue, relating to the above findings that many are still in early or growth stages. This also suggests potential for increased music impact as the sector grows.

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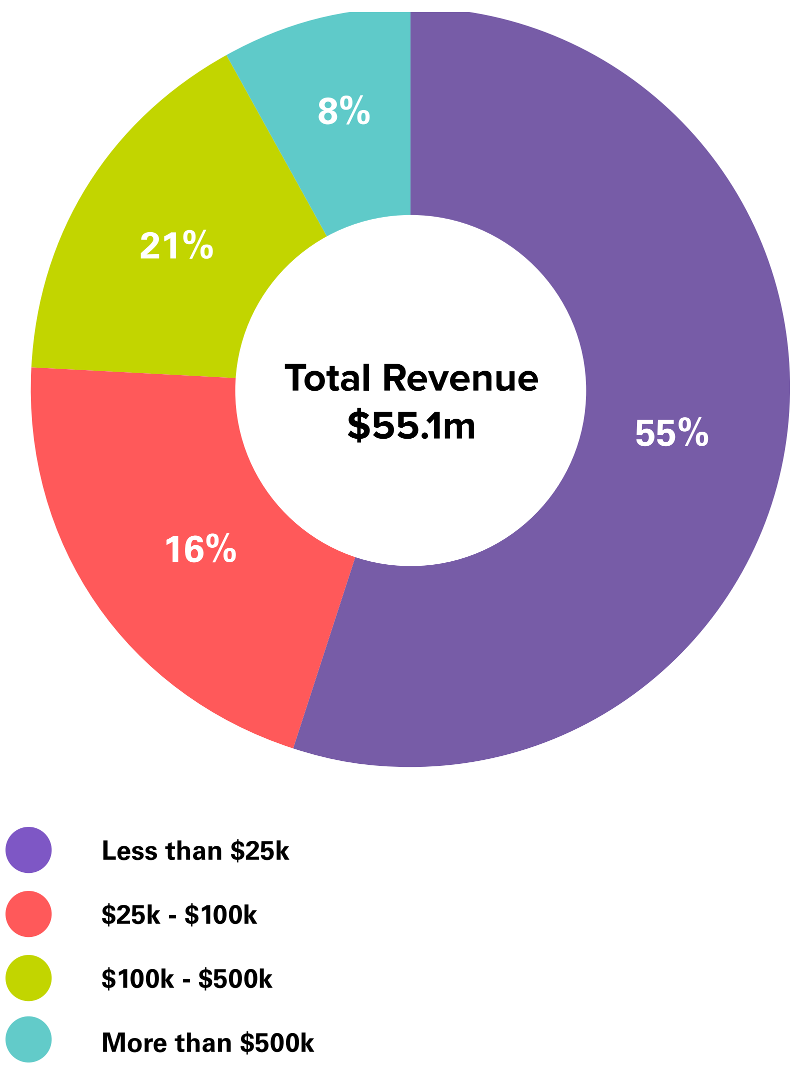
[20] Here, The Beat. (2018). Nordicity

FIGURE 36

2019 Music Business Revenue Breakdown (n=38)



Businesses also reported an average **expenditure ratio of 91% ($280,000)**. As seen in Table 9, the largest category of expenditure was labour (29%) followed closely by supplies and materials (25%) and rent (24%).

Table 9 - Category of Expenditure

Expenditure Category	Percent of Total Expenditure
Labour	29%
Supplies and materials	25%
Rent	24%
Advertising and marketing	13%
Other	9%

Source: Surrey Music Strategy Survey

The survey also revealed that the significant majority of expenditures were spent within Surrey/Vancouver (78%) or elsewhere in BC (10%). The **high proportion of local spending** is an important finding as it suggests **minimal economic leakage** (and greater indirect impacts of the industry).[21]

Table 10 - Location of Expenditure

Location of Expenditure	Percent of Total Expenditure
In Surrey/Vancouver	78%
Outside Surrey but within BC	10%
Elsewhere in Canada	6%
Outside Canada	6%

Source: Surrey Music Strategy Survey

[21] Leakage refers to capital or income that escapes an economy or system (i.e. money that is spent outside of Surrey). This creates higher indirect impact as more of the money is spent on local suppliers.

Extrapolating from Table 11, it is estimated that music businesses in Surrey created nearly **$19.5M in direct GDP contributions** in 2019. In addition, the direct impact of music businesses created approximately **450 full time equivalent jobs**. As tabulated below, combined with indirect and induced impacts, music businesses generated nearly **$40M** in GDP and supported more than **700 jobs** and **$22.3M** in income generation.

Table 11 - Indirect and Induced Impacts

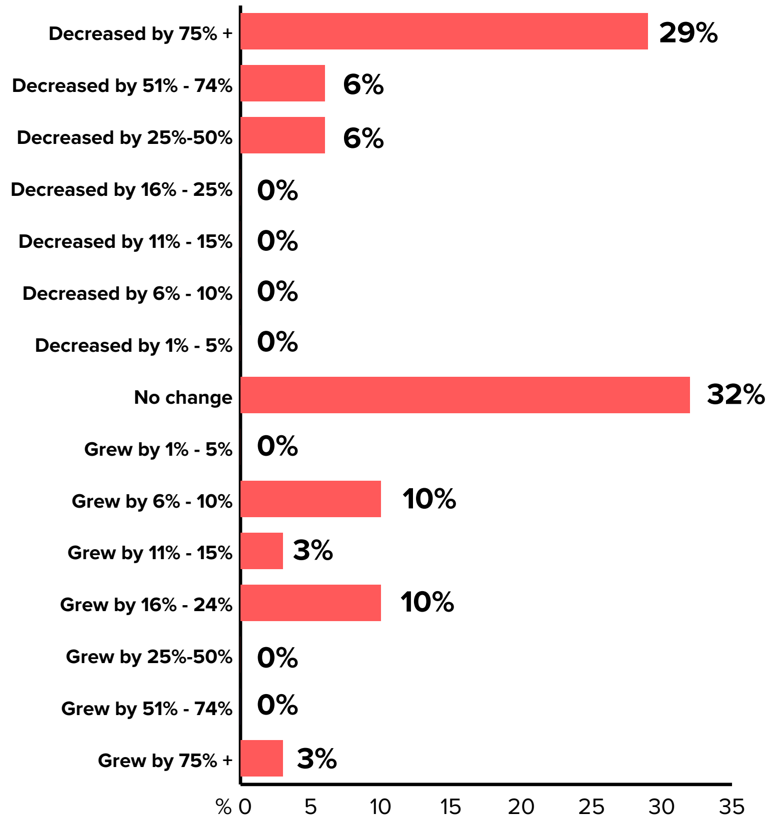
Music Business Impact	Direct	Indirect (Spin-Off)	Induced (Spin-Off)	Total
GDP	$19,483,000	$11,943,000	$8,570,000	$39,996,000
Income	$14,528,000	$4,939,000	$2,837,000	$22,305,000
Employment	450	190	90	730

Source: Surrey Music Strategy Survey

COVID-19 Impact on Music Businesses

FIGURE 37

Compared to 2019, how did your 2021 gross revenue or sales change? (n=31)



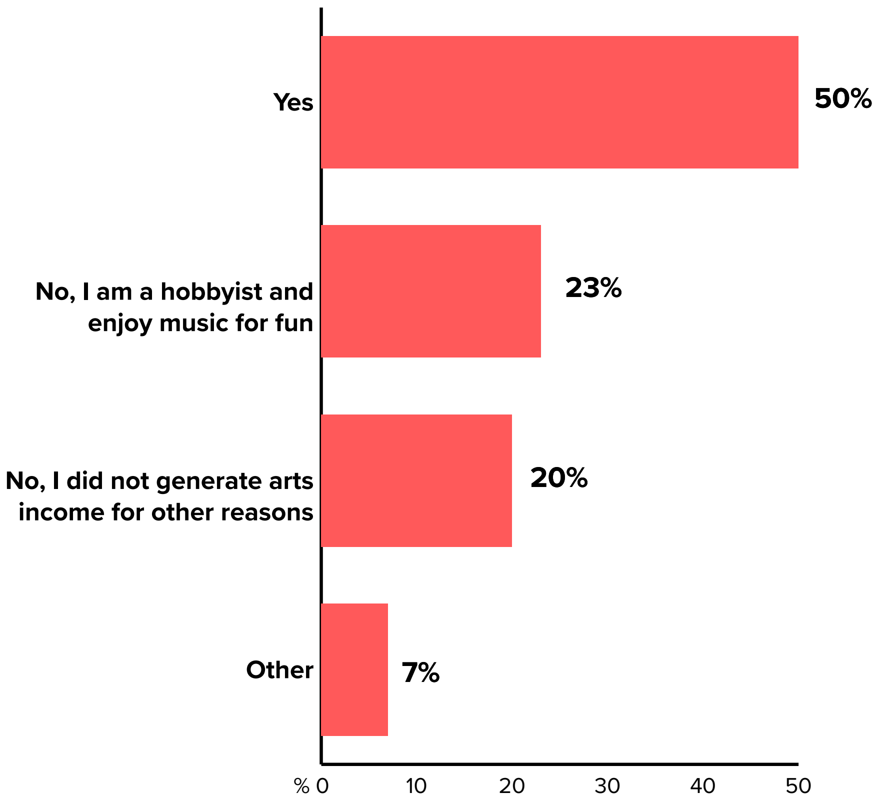
In comparing music businesses' 2021 gross revenue or sales to 2019 (Figure 37), 32% report no change in revenue and/or sales. However, 29% of participants report a decrease of 75%. Comparatively, only 3% of respondents report an increase of 75%. Notably, a significant majority of respondents indicated either being impacted significantly, or not at all, suggesting the disparity in impacts of COVID-19 on music businesses. For those that were significantly impacted, the most commonly cited impacts were the closure of venues and cancellation of live shows.

Source: Surrey Music Strategy Survey

Musician Profile

FIGURE 38

Did you generate income through your work in music in 2019? (n=211)



Based on analysis of National Occupational Classification (NOC) 5133 (musicians and singers), there **are approximately 775 professional paid musicians** in Surrey. Considering the survey findings that only **half of those who responded as a musician earned income from** their music activities, the *real* number is likely to be roughly 1,500. That is, the NOC estimate only includes those who report income from their music activity, which, as shown below, is only half of the musicians in Surrey. Others are hobbyists and those who enjoy music for fun (23%).

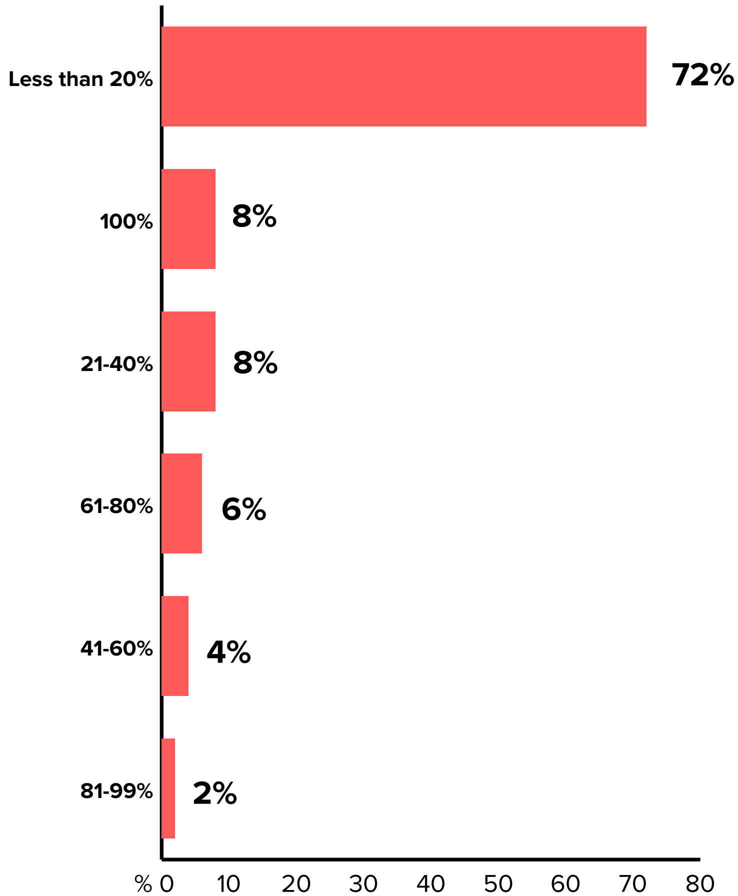
Comparatively, the City of Victoria Music Strategy and music research identified approximately 396 professional paid musicians.[22]

Source: Surrey Music Strategy Survey

[22] City of Victoria. Victoria Music Strategy 2021-2026.

FIGURE 39

Of your 2019 annual income, what portion of it came from your activities in the music industry? (n=114)



Almost three quarters of participants indicated that less than 20% of their 2019 annual income came from activities in the music industry (72%) (Figure 39). Moreover, only 8% reported earning the entirety of their annual income from the music industry in 2019, further illustrating the concentration of musicians earning a limited amount of revenue from their music activity.

Source: Surrey Music Strategy Survey

Growth Stage

Musicians were further asked to identify the stage of their career in the industry (Figure 40). Music career stages were defined as follows:

- **Emerging Artist:** You are in the early stages of your career but lack the resources and technology to create music or the opportunities to perform your music. You are also someone who is just starting to build up their musical repertoire and following.
- **Mid-Career Artist:** You have created an independent body of work through the years. You have built up an audience base and have played a handful of shows. You may have received funding for your projects/shows.
- **Established and/or Full-Time Musician:** You are at the mature stage of your career where you have built up an extensive body of independent work. You have reached a level of achievement and recognition at a provincial/ national level. You rely on live performance and music streaming as a stable source of income.

As Figure 40 depicts, most musicians in Surrey are mid-career artists (41%). The remaining are emerging artists (37%) and established and/or full-time musicians (22%). Overall, results are indicative of quite an equal distribution across the different stages.

Source: Surrey Music Strategy Survey and Musician Database Intake Forms

FIGURE 40

Pick one that best applies to the stage in your career as a musician: (n=361)

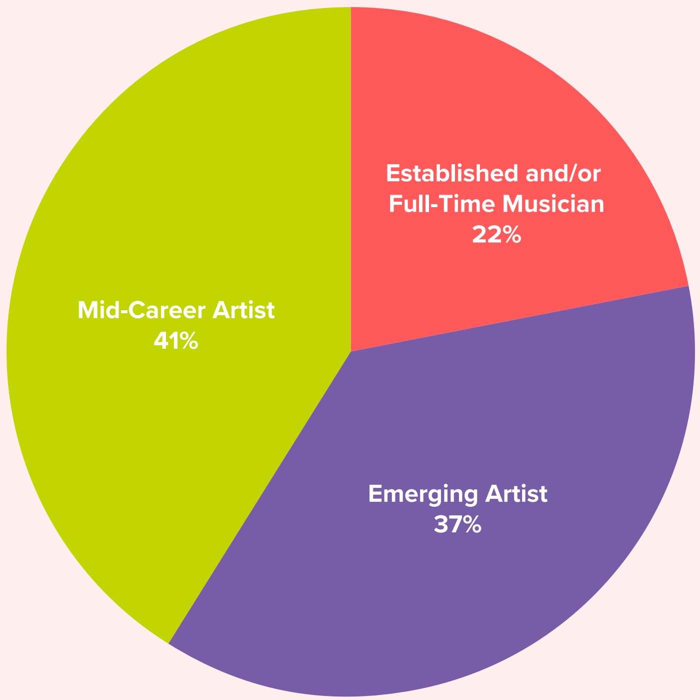


FIGURE 41

How many years have you been an active musician? (n=366)

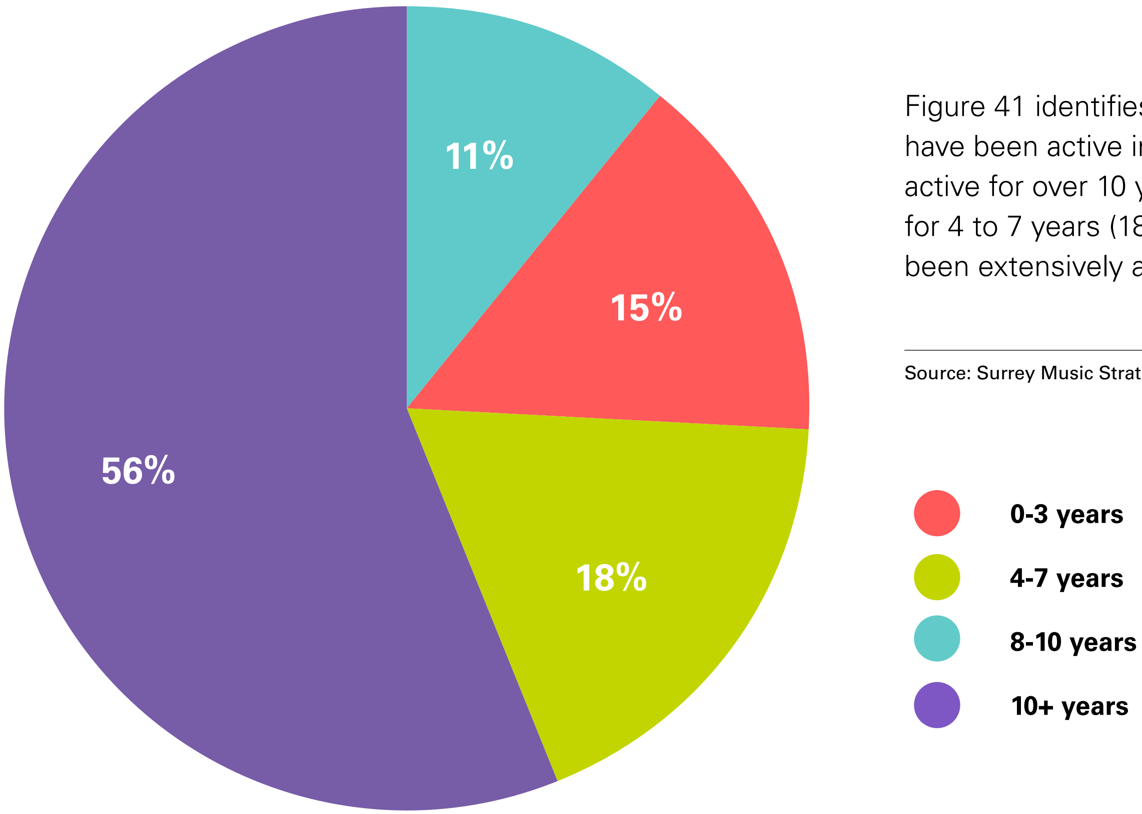


Figure 41 identifies the number of years musicians in Surrey have been active in their careers. Most musicians have been active for over 10 years (56%), while others have been active for 4 to 7 years (18%). Overall, Surrey-based musicians have been extensively active in their careers.

Source: Surrey Music Strategy Survey and Musician Database Intake Forms

Musician Impact

The survey identified an average annual **revenue of $14,353**, totaling more than $11M generated by the estimated total of 775 paid musicians described above. Comparatively, the average annual income for musicians in Vancouver is $18,178.[23] It is also interesting to note that the average annual provincial revenue of musicians in British Columbia is $19,515.[24]

As visualized in Figure 42, the significant majority (74%) reported less than $10k in music related income, relating directly to the findings above that most earn only a part of their annual income from music activities.[25]

Respondents reported an average **expenditure ratio of 81% (or $11,626)**. Extrapolating using the estimated total of 775 paid musicians described above, Surrey musicians generated more than $9M in direct economic output and $2.1M in direct GDP contributions in 2019.

Using Nordicity's MyEIA™ Model and ratios established in other music research, it is estimated that an additional $1.3M is generated indirectly (e.g. spending on suppliers) and through induced impacts, totaling **$4.3M in GDP impacts**. In addition, musicians generated a total of **$17M in income** for Surrey residents through the creation of more than **870 FTEs**.

Source: Surrey Music Strategy Survey

[23] City of Vancouver. The Vancouver Music Strategy.

[24] Work BC. Musicians and singers (NOC 5133).

[25] Note, these findings are important to keep in mind when comparing the size of impact of musicians to other impact assessments. That is, many musicians are doing this part time and/or are in the early stage of their career, indicating potential for more impact to be generated from additional opportunities for these musicians in Surrey.

FIGURE 42

Breakdown of 2019 Musician Revenues (n=86)

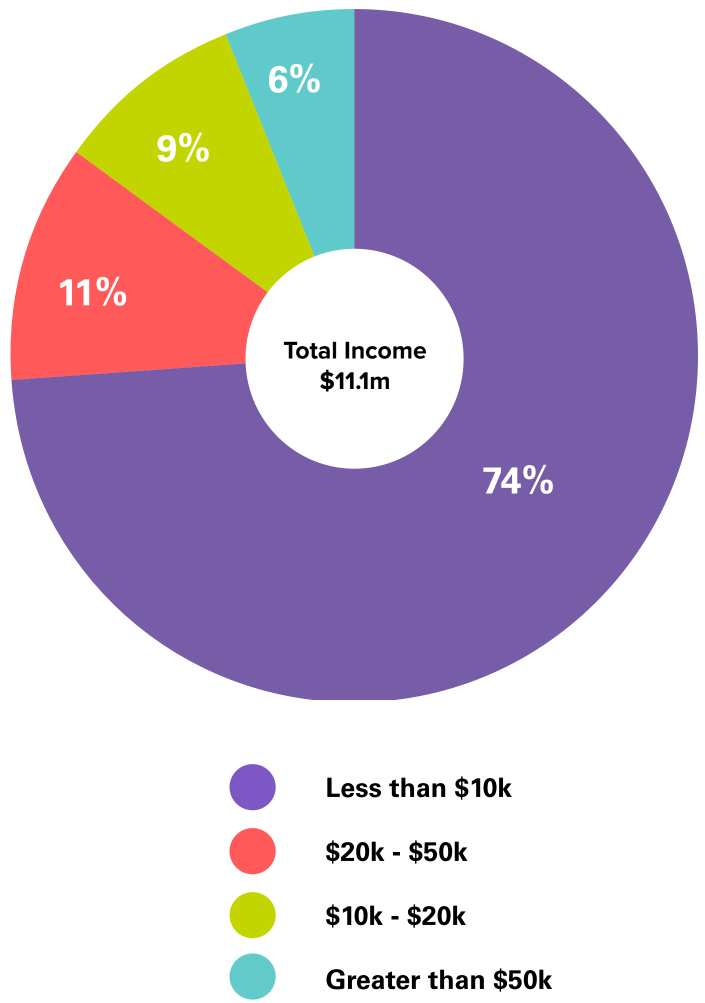


Table 12 - Musician Impact

Musician Impact	Direct	Indirect	Induced	Total
GDP	$2,114,000	$1,296,000	$930,000	$4,339,000
Income	$11,124,000	$3,782,000	$2,172,000	$17,077,000
Employment	390[26]	320	160	870

Source: Surrey Music Strategy Survey

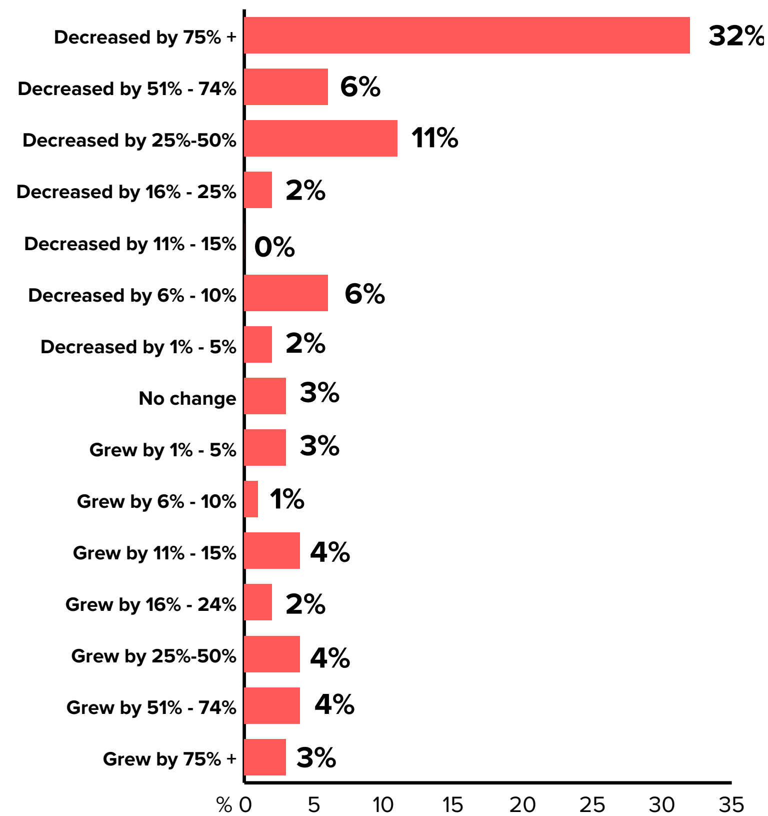
[26] Note, musicians were estimated to be a 0.5 FTE given the significant finding that the large majority have other income generating activities.

COVID-19 Impact on Musicians

In comparing musicians' 2021 gross revenue or sales to 2019 (Figure 43), 32% of participants report a decrease of 75%, while only 3% report an increase of 75%. The results reflect the dire impact of the COVID-19 pandemic on musicians' revenue. Some of the major impacts noted include hindrances to audience and career growth opportunities, as well as loss of income. Another identified impact on respondents is loss of employment.

FIGURE 43

Compared to 2019, how did your 2021 gross revenue or sales change? (n=99)



Source: Surrey Music Strategy Survey

Other Music Cities Comparison

The following table provides comparisons in direct, indirect, and induced economic impact findings between other music cities. FTE stands for "full-time equivalent" which is a unit of measurement used to determine the number of full-time hours worked by all employees in a business.

Table 13 - Music Cities Comparison

Cities	City Population	Year of the Study	Direct Impact	Indirect/Induced Impacts
Surrey	568,000	2022	$90 million CAN 2,300 FTEs	$21.3 million in indirect impact $22.3 million in induced impact
Victoria	394,000	2021	$223.61 million CAN 3,629 FTEs	1,986 jobs 160.01 million GDP
Seattle	734,000	2015	$4.3 billion US 16,607 FTEs	30,660 jobs $1.4 billion in labor income
Vancouver	631,486	2018	$690 million CAN 7,945 FTEs	6595 indirect jobs Over $1.5 billion induced GVA
Toronto	2,865,773	2014	$850 million CAN 10,500 FTEs	n/a
Manchester	552,000	2022	£178 million 4,520 FTEs	£107 million in GVA and 1,870 in FTEs indirect £23 million in GVA and 440 FTEs induced

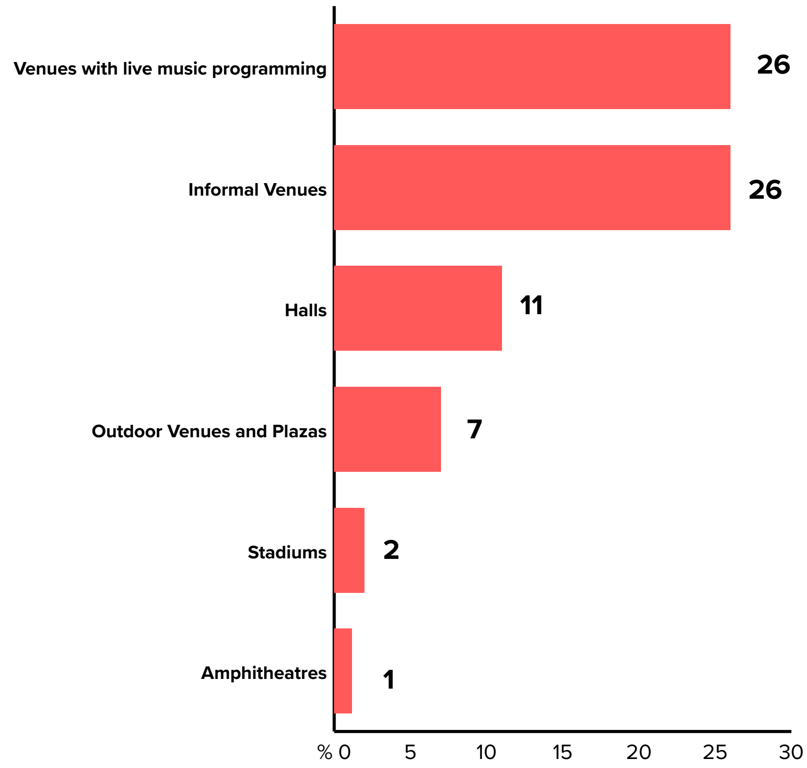
Source: Nordicity Research

Live Music Operational Impact

Throughout the asset mapping desk research, **75 music venues in Surrey were identified. The types of music venues are broken down** in Figure 44.

Source: Surrey Music Strategy Survey

FIGURE 44
Venue Operational Impact



While live music reporting was sparse in the survey (and Surrey Music Database), Nordicity's research suggests that the total **revenue generated by these venues is nearly $38M.**[27]

In addition, 10 festivals were identified through desk research. Using previous research, Nordicity estimates that these festivals generated an additional **$6.5M** in revenue.

Based on findings that these companies operate on zero profit margins and spend more than a half of their expenses on labour,[28] the operational impact is immense. Combined with the indirect and induced spending, live music operations created more than **$46M in GDP** impact and supported more than **1,000 FTEs** and **$31M** in labour income.

Table 14 - Live Music Operational Impact

Live Music Operational Impact	Direct	Indirect (Spin-off)	Induced (Spin-off)	Total
GDP	$22,670,000	$13,897,000	$9,972,000	$46,539,000
Income	$20,177,000	$6,859,000	$3,940,000	$30,976,000
Employment	630	260	130	1010

Source: Surrey Music Strategy Survey

[27] Based on the provincial average of $505k in annual music related revenue generated by venues in BC.

[28] https://www.nordicity.com/de/cache/work/80/Here_the_Beat_Nordicity.pdf

CASE STUDY

Impact of City Festival Programming

Surrey Fusion Festival 2022 generated more than **$7 million in economic impact from consumer and tourism spending outside** the event. This included a tourism spend with over 20% of attendees travelling from outside of Surrey. In 2022, Surrey Fusion Festival welcomed a record high of 90,000 attendees over two days.

The impact of the City's festivals went beyond Surrey Fusion Festival, with 2022 seeing the return of many events for the first time in three years. Recent data indicates that more than 20% of Party for the Planet, Surrey Canada Day, and Surrey Tree Lighting Festival attendees came from outside of Surrey. The 105,500 combined visitors **spent up to $11.9 million on surrounding businesses**, with nearly 40% spending **more than $50 before/after the event**. Total estimated economic impact from the **City's 2022 major events was $18.9 million**.

While these events are more than 'music festivals', live music was ranked as the most enjoyable aspect/activity by a significant majority of respondents (66%), indicating the importance of music as a draw to events.

Consumer Spending and Tourism Impact

Due to sparse survey data regarding live music financials and attendance, Nordicity has used a custom approach describing the impacts of tourism and consumer spending as a spillover impact of the live music industry.

Survey respondents reported that they spend an average of $69 before/after a music activity. While not statistically representative of the whole population of Surrey, 42% of survey respondents indicated attending live music events every few months (or more), resulting in an average of 6 events per year.[29] From this, Nordicity estimates that **Surrey residents spend up to $138M before and after music activities**, as well as an estimated **$120M from visitors**.

While estimating tourism impact is challenging without reliable estimates of audience numbers and provenance data, the research still indicates the significant impact of music tourism. Music tourism is most commonly associated with well-known touring acts and festivals, as fans will often travel to a major centre to consume the live experience when a tour passes through. Similarly, some music ecosystems represent a tourist destination in their own right, most often in cities known for a particular genre of music such as Toronto, Nashville or New Orleans.

[29] Note, given the tendency for survey respondents to overreport their attendance at events than what would be the overall community average, a conservative estimate (based on Nielsen data cited), was used to be able to reliably extrapolate up to the broader Surrey population.

To ensure no double counting of the operational estimates above, analysis of the economic impact of tourism necessarily focuses on the portion of visitor spending that occurs outside of music events. Such visitor spending may include travel (e.g. car rentals, transit, Canadian fares, etc.), accommodation (e.g. hotels), food and drink (e.g. restaurant, grocery store), and other expenditures that may occur during a visit to Surrey. This section outlines the value of tourist spending, focusing specifically on spending associated with music tourists. As summarized in Table 16, the overall value of tourism spending varies significantly depending on the provenance of the visitor.

CASE STUDY

FVDED in the Park Festival

Previous FVDED in the Park estimates for the festival suggest it generated up to $5M for the local economy in a given year. Nearly 80% of this impact was generated from out-of-town attendees who spent money on local businesses, including $700K on hotels alone.

Table 15 - Tourist Spend[30]

Provenance of Visitor	Average Spend per Visitor
BC travelers (i.e. within BC from outside Surrey)	$260
Other Canadian residents	$750
US residents	$550
Other international residents	$1,130

While the total number of shows and audience figure reporting was sparse in the survey reporting, Nordicity has used industry standards from previous research to provide a rough estimate of the tourism spend in Surrey. Using provincial estimates for the average number of shows and capacity of music venues Nordicity estimates **total music attendance to be approximately 1.5M in 2019.**

Combining this estimate with limited audience provenance data from Surrey Civic Theatres, Party for the Planet, Surrey Canada Day, Surrey Fusion Festival, Surrey Tree Lighting Festival and FVDED In the Park, a high-level estimate of the tourism spend is tabulated below.

[30] Destination BC Estimates. https://www.destinationbc.ca/content/uploads/2018/05/Vancouver-Coast-Mountains-Regional-Tourism-Profile_2017.pdf

Table 16 - Total Tourism Spend[31]

Provence of Visitor	Estimated % of Total Audience	Estimated Spend
From within Surrey	80	Not within tourism
BC travelers (from outside Surrey)	15	$59M
Outside BC	3	$35M
Outside Canada	2	$26M
Total Tourism Spend		**$120M**

While the above estimate is only a **high-level estimate** based on limited available data, it is important to highlight the vast opportunity for music tourism, even from tourists within BC. It is also important to note that these figures represent direct spend only and do not capture additional indirect and induced impacts (e.g. when a hotel worker buys groceries). As noted in the breakout boxes, certain events are already generating significant impact through local and tourist consumer spending.

Source: Destination BC Estimates

[31] Destination BC Estimates. https://www.destinationbc.ca/content/uploads/2018/05/Vancouver-Coast-Mountains-Regional-Tourism-Profile_2017.pdf

Music Business Database NAICS Codes

As tabulated below, the music business analysis focused heavily on the same set of NAICS as defined by Creative BC in its Creative Industries Economic Results Assessment (CIERA) model.[32]

Table 17 - NAICs Codes

NAICS Code Pull	Category	Description	Creative BC Music Sector
451140	Instruments	Musical Instrument and Supply Stores	√
414440	Personal and Household Goods Wholesaler-Distributors	Sound Recording Merchant Wholesalers	√
512220	Recording and Product	Integrated Record Production/Distribution	√
512230	Recording and Product	Music Publishers	√
512240	Recording and Product	Sound Recording Studios	√
512250	Recording and Product	Record Production and Distribution	√
512290	Recording and Product	Other Sound Recording Industries	√
515112	Radio	Radio Stations	√
711130	Musicians, Managers, Agents	Musical Groups and Artists	√
711410	Musicians, Managers, Agents	Agents and Managers for Public Figures	√
711510	Musicians, Managers, Agents	Independent Artists, Writers, and Performers	√
711112	Performing Arts, Spectator Sports and Related Industries, and Heritage Institutions	Musical Theatre and Opera Companies	√
711130	Performing Arts, Spectator Sports and Related Industries, and Heritage Institutions	Musical Groups and Artists	√
711311	Performing Arts, Spectator Sports and Related Industries, and Heritage Institutions	Live Theatres and Other Performing Arts Presenters with Facilities	√
339992	Instruments	Musical Instrument Manufacturing	

[32] https://www.creativebc.com/sector/research-reports/ciera/

Source: North American Industry Classification System (NAICS) and BC Creative Industries Economic Results Assessment (CIERA)

Music Business Codes

Table 18 - Music Business Codes

NAICS Code	Category	Description
339992	Instruments	Musical Instrument Manufacturing
451140	Instruments	Musical Instrument and Supply Stores
512220	Recording and Product	Integrated Record Production/ Distribution
512230	Recording and Product	Music Publishers
512240	Recording and Product	Sound Recording Studios
512250	Recording and Product	Record Production and Distribution
512290	Recording and Product	Other Sound Recording Industries
532229	Live Events	All Other Consumer Goods Rental*
515112	Radio	Radio Stations*
611310	Education	Colleges, Universities, and Professional Schools*
711510	Education	Fine Arts Schools*
711112	Live Events	Performing Arts Companies
711130	Live Events	Promoters of Performing Arts, Sports, and Similar Events with Facilities*
711311	Live Events	Promoters of Performing Arts, Sports, and Similar Events without Facilities*
339992	Live Events	Drinking Places (Alcoholic Beverages)*
711110	Musicians, Managers, Agents	Theater Companies and Dinner Theaters
711120	Musicians, Managers, Agents	Dance Companies*
711190	Musicians, Managers, Agents	Other Performing Art Companies
711130	Musicians, Managers, Agents	Musical Groups and Artists
711410	Musicians, Managers, Agents	Agents and Managers for Public Figures*
711510	Musicians, Managers, Agents	Independent Artists, Writers, and Performers*

Source: North American Industry Classification System (NAICS)
*Note that businesses within these were cross-checked for relevance, but not all were applicable.

Developing the Live Music Universe

It is estimated there are **around 120 live music spaces** in Surrey. This figure was created by estimating the total size of the live music industry via the North American Industry Classification System (NAICS herein) code 711110 (Live Events). Nordicity then developed a list of spaces for live music in the city which was augmented by a custom search of venues that host live music events. NAICS codes were cross-checked by using the Surrey music business database intake forms, followed by scraping online listings and Google maps to ensure all assets were identified. Items were defined and cleaned following Appendix B by venue type (e.g. indoor and outdoor) as well as how music occurred (e.g. where it was explicitly stated that they hold live music regularly or occasionally).

Appendix E

Surrey Music Strategy Mapping Visualizations

Introduction to Visual Summaries

An in-depth mapping exercise was undertaken to evaluate what music-related assets exist in Surrey during Summer 2022. Existing lists and data were gathered through NAICS codes (See Appendix D), the musician and music business database intake forms, and an extensive web-scraping exercise (to identify any previously unmapped stakeholder groups and sub-sectors). A categorization of mapped music assets can be found in Appendix E.

The focus of the following analysis is on all music-related assets in Surrey, highlighting the breadth and depth of its music ecosystem. Understanding how many music-related assets sit within music areas and sub-sectors can help Surrey and decision makers gain a clear picture as to what (and where) music companies exists, so they can determine how to best support the music ecosystem moving forward. Additionally, a Surrey Town Centre specific analysis focuses on music assets found in Surrey's urban core.

Note, all mapping only showcases physical spaces; organizations and businesses with a registered office, venue, or space address (mapped by postal codes). Therefore, the following figures do not represent Surrey's entire music workforce but allows the viewer to gain a general understanding of the assets that exist.

Music-Related Asset Analysis

A total of 240 music assets were mapped across the city of Surrey as of June 2022. All physical infrastructure such as live festivals, outdoor venues, indoor venues, and music businesses were targeted. Support organizations such as associations, non-profits, and societies were also identified. The asset areas are further broken down into specific asset types in subsequent maps.

In looking at the full map of music-related assets in Surrey (Figure 45), physical infrastructure is found to be spread out across the city, with only slight clustering occurring around city centres. This spread is consistent with what we heard in engagement that no 'music or entertainment district exists in Surrey'.

FIGURE 45

Map of Music-Related Assets in Surrey

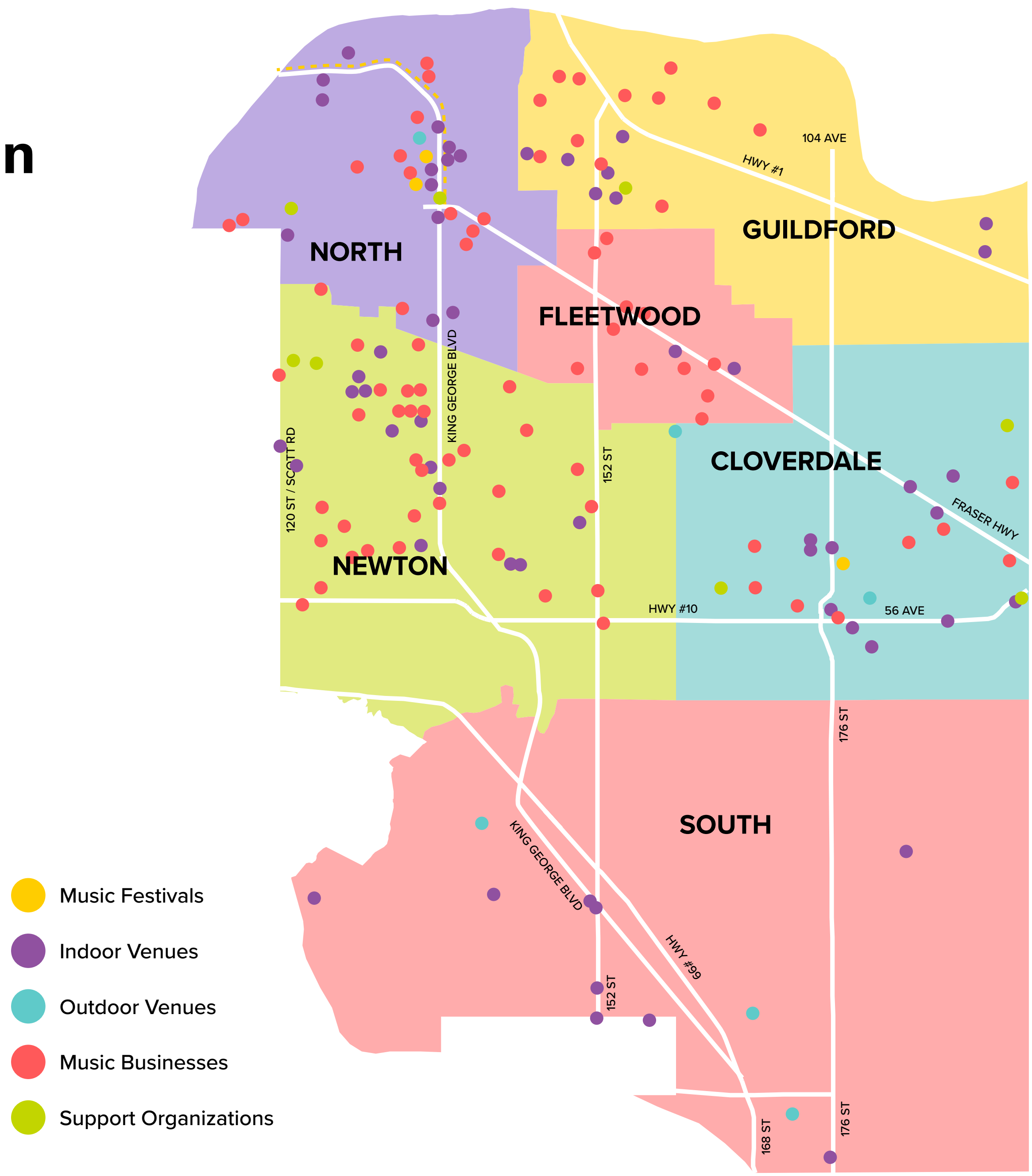


FIGURE 46

Heat Map of Music Assets in Surrey

A heat map is a data visualization technique that shows the magnitude of a phenomenon in colour. The variation in colour indicates level of intensity of the asset points, detailing how the points are clustered or vary over a space. The heat map (Figure 46) further exemplifies how assets are spread out across Surrey given the wide area in colour variation covered. While Surrey's music assets are relatively spread out in the community, some clustering of music assets are occurring in City Centre and north Newton, with slight clustering in Cloverdale and west of Guildford.

Source: Surrey Open Data and Nordicity Research

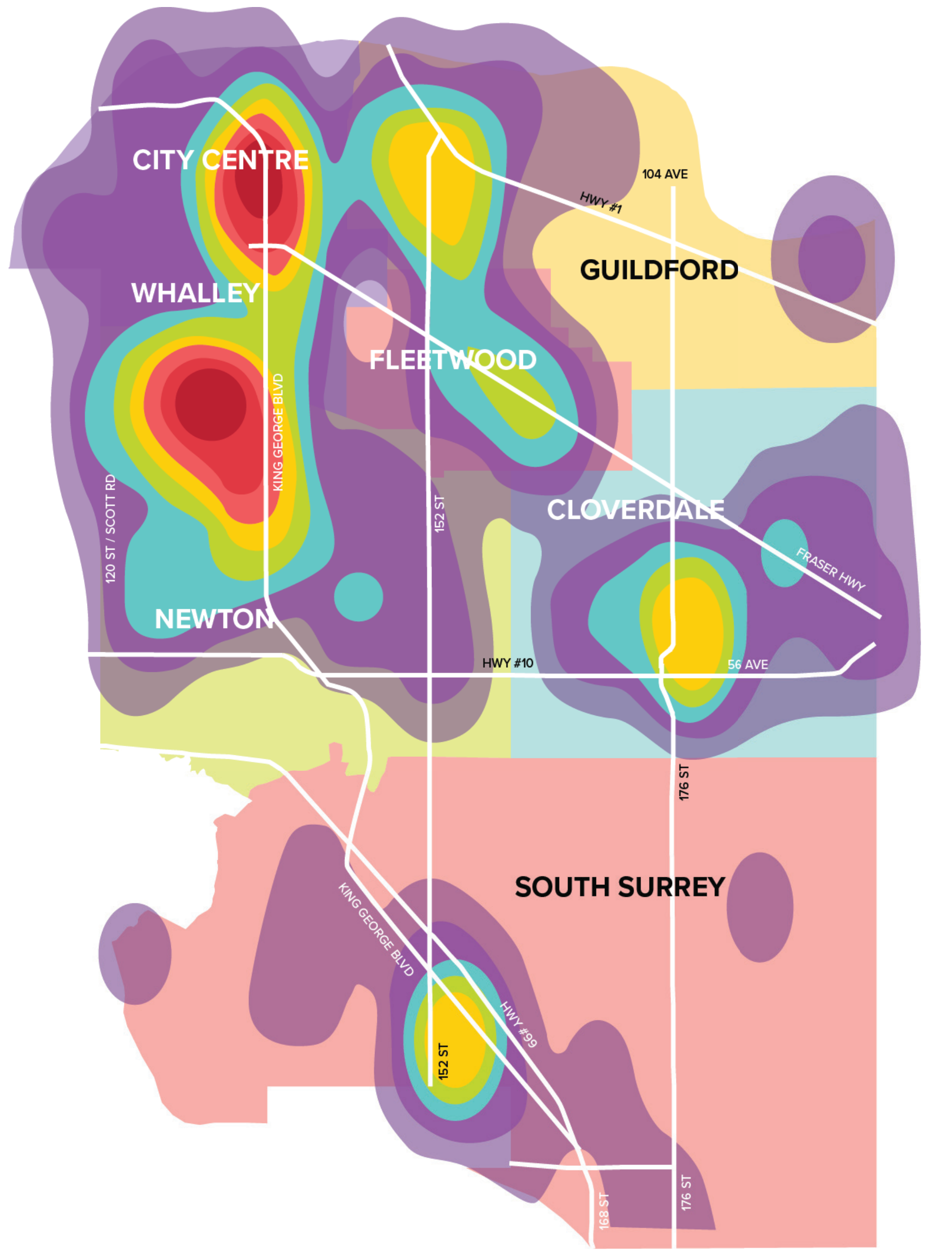
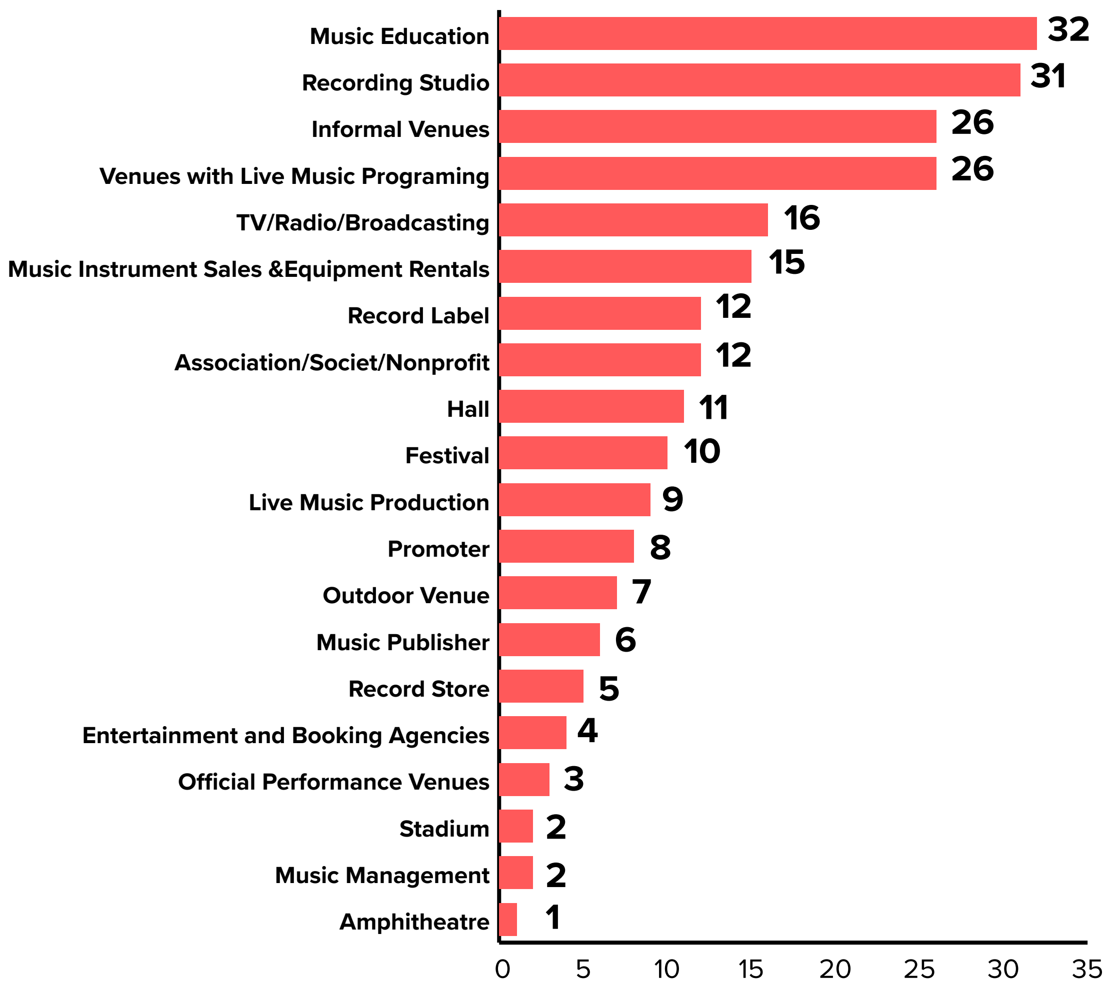


FIGURE 47

Asset Breakdown by Type



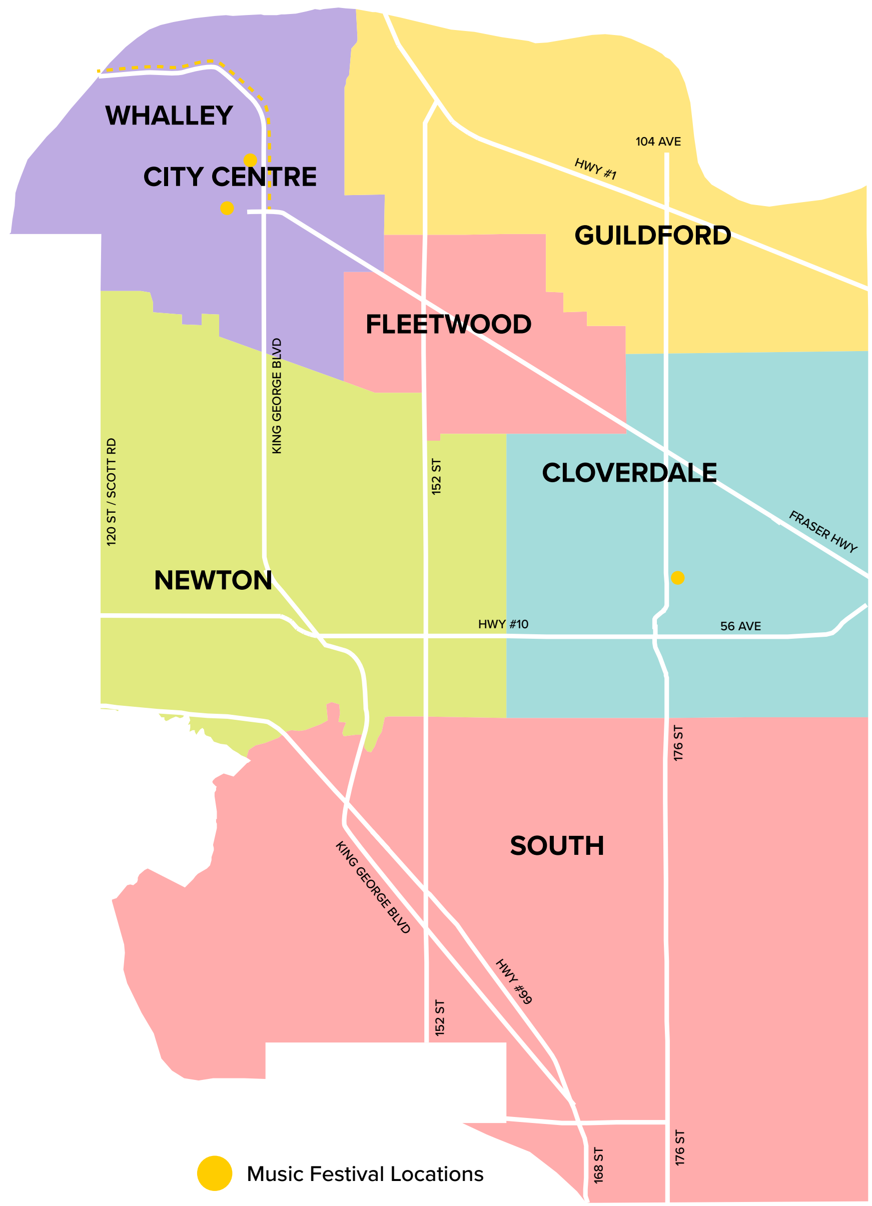
Music businesses make up the greatest portion (58%) of the music ecosystem in Surrey, followed by indoor venues (28%). It is acknowledged that 'venues with live music programming' – which include bars, pubs, clubs, restaurants and cafes – may be greater in number than evidenced however, for the purpose of this spatial exercise we have only identified those who have specifically acknowledged they host live music and music events.

Source: Nordicity Asset Identification

FIGURE 48

Recurring Music Festivals in Surrey

A total of **10** music festivals are found in Surrey (Figure 48). Most of the music festivals occur in the two urban centres of City Centre and Cloverdale. This distribution could be indicative of the desire by event organizers for large venue spaces, central locations, or more likely, a combination of both. The festivals in City Centre that have occurred at Holland Park include 5X Festival, Surrey Fusion Festival, FVDED in the Park, and Festival of India. Another popular City Centre location is Surrey Civic Plaza, where festivals occur such as the Surrey Latin Festival. Surrey Canada Day and Gone Country take place in Cloverdale at the Bill Reid Millennium Amphitheatre. Additionally, the Sound of Summer live music concerts occur in parks throughout Surrey during the summer. Note, parks which are frequently used for music events are identified in the outdoor venue map (Figure 50).



Source: Surrey Open Data and Nordicity Research

FIGURE 49

Music-Related Indoor Venues in Surrey

Figure 49 identifies **66** mappable music-related indoor venues in Surrey such as official performance venues, spaces which host live music (e.g. halls, bars, nightclubs, restaurants, coffee shops), as well as other informal venues where occasional live music occurs (e.g. schools, churches and community centres) that are able to be represented by a map. The mapping exercise revealed that the majority of indoor venues are found in North and Central Surrey, with fewer assets identified in South Surrey. However, the wide dispersion of indoor spaces in general across the community illustrates the range of opportunities for those living outside the main commercial and retail areas to engage with music.

Source: Surrey Open Data and Nordicity Research

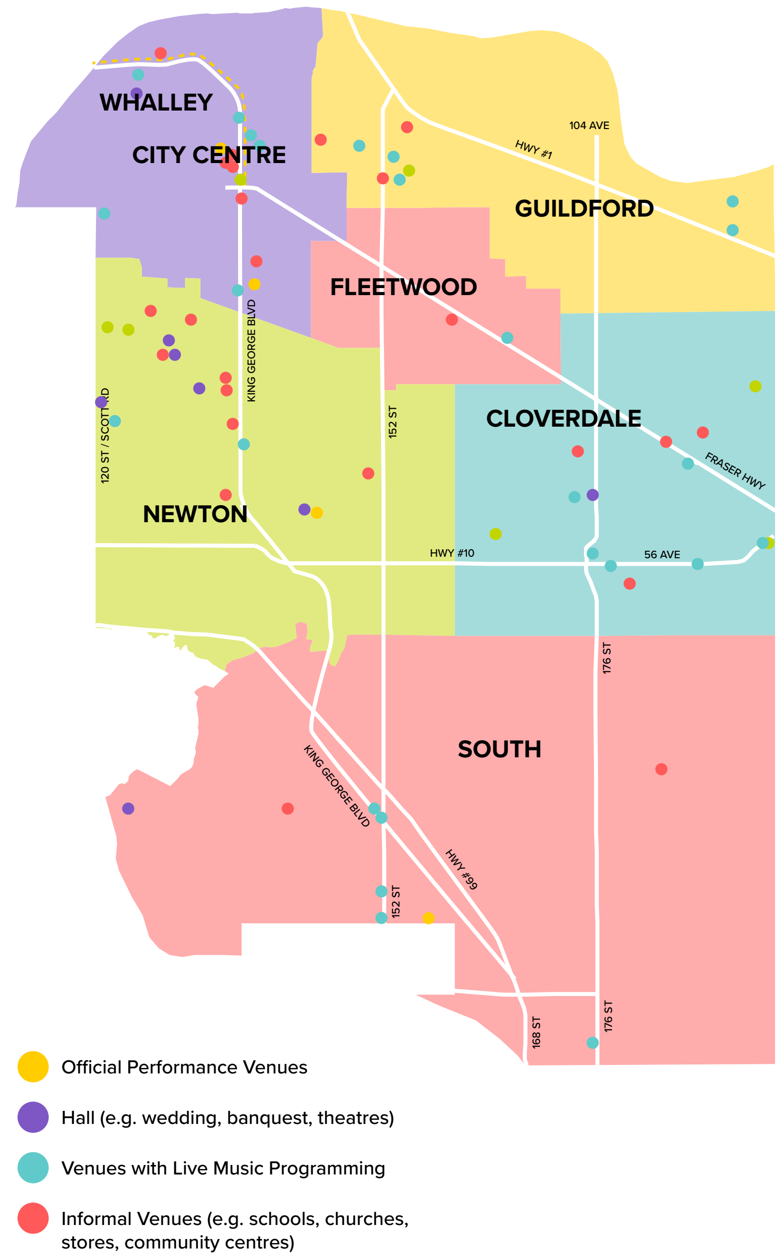


FIGURE 50

Music-Related Outdoor Venues

Figure 50 considers all music-related outdoor venues in Surrey. One amphitheatre and two stadiums are identified, as well as popular outdoor green areas that are commonly used for live music (e.g. Sounds of Summer). Park structures (both temporary and permanent) and sports fields have also been included in this mapping exercise as locations where popup music sessions or music programming could occur. Notably, the number of outdoor covered areas in Surrey represents a significant opportunity for more performances, either formally or informally presented. Indeed, such park assets were highlighted by stakeholders as a major underutilized opportunity.

Source: Surrey Open Data and Nordicity Research

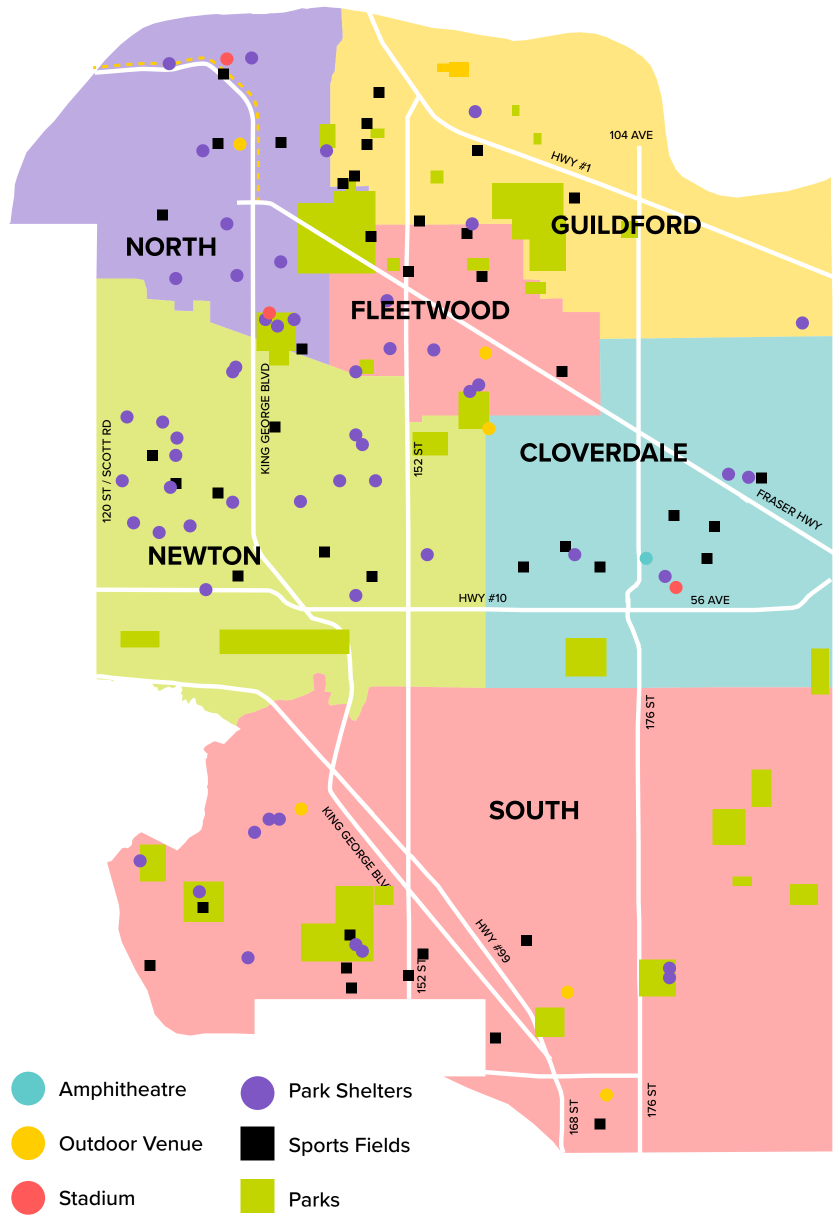


FIGURE 51

Music Businesses in Surrey

150 music businesses have been identified in Surrey (Figure 51). Music businesses include enterprises such as record stores, music instrument sales, and equipment rentals; services such as education programs and tv/radio/broadcasting; and professional musician services such as publishers, promoters, record labels, talent and booking agencies, production, and management. As mentioned previously, only businesses with registered addresses have been mapped, so the figure gives a sense of the size of Surrey's music business sub-sector but is not representative of every worker within.

Source: Surrey Open Data and Nordicity Research

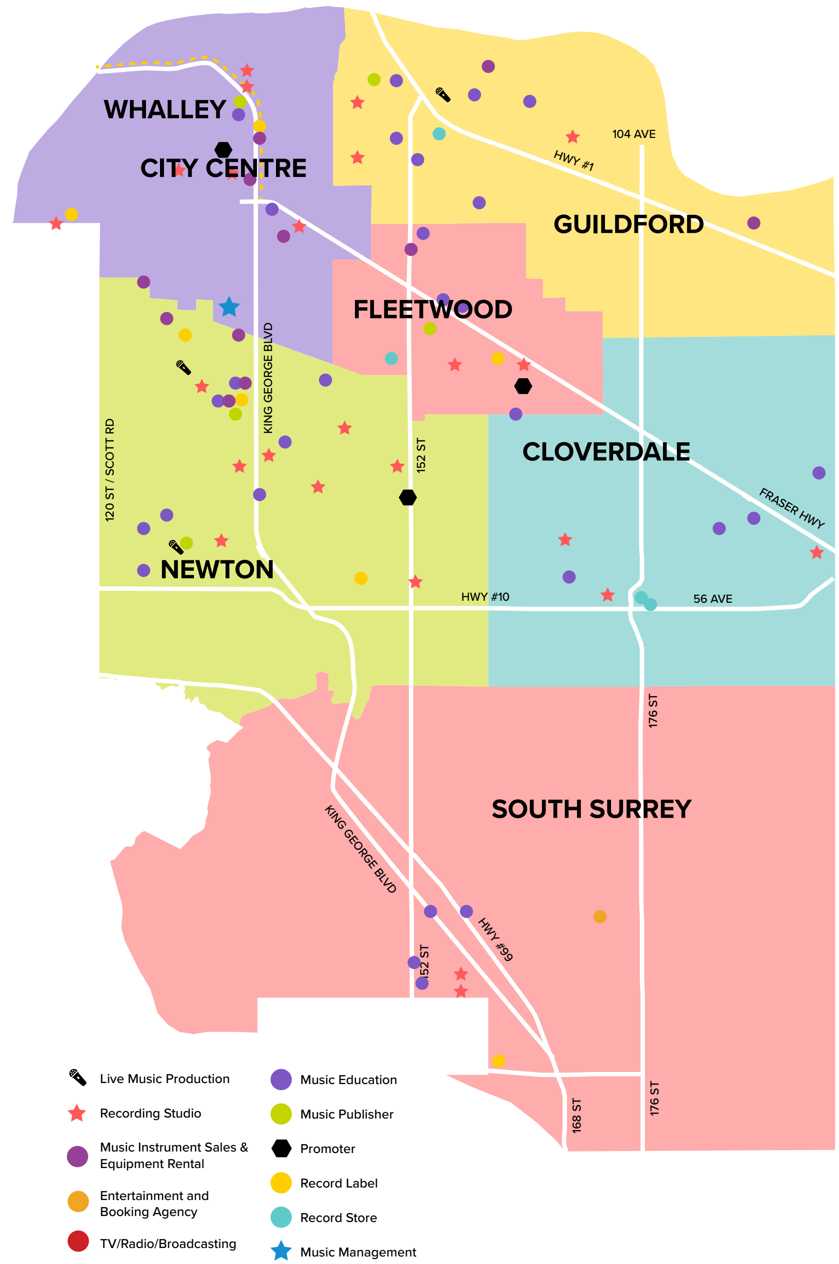
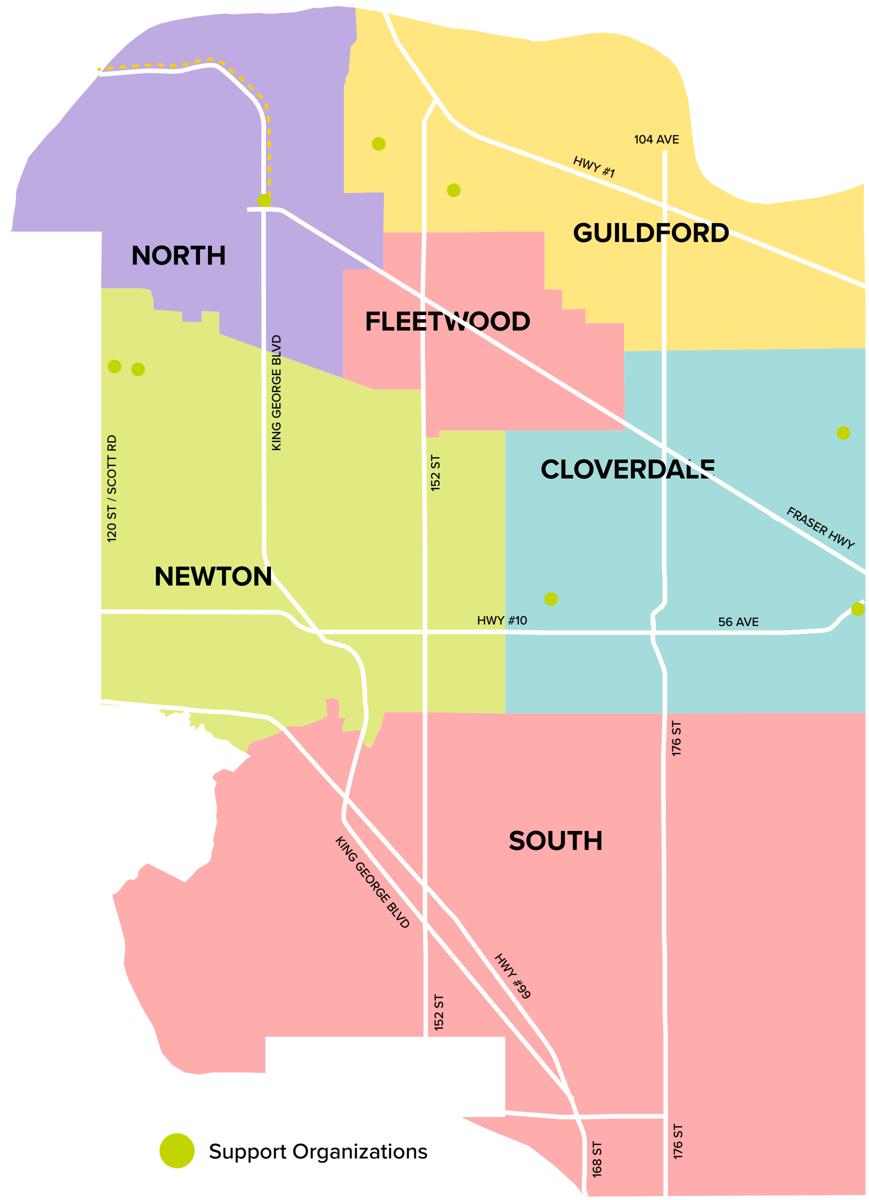


FIGURE 52

Music Support Organizations in Surrey

A total of **12** music support organizations such as associations, non-profits and societies are identified in Surrey, illustrated in Figure 52. Examples include, but are not limited to, the Surrey Music Office at the Surrey Board of Trade, the Gospel Music Association, and the Festival African Heritage Music and Dance Society. It is interesting to note that these organizations are found spread across Surrey, and not necessarily centralized around clusters of activity they support (venues, music businesses, etc.). Notably, there is a lack of music support organizations in the South Surrey area.

Source: Surrey Open Data and Nordicity Research



Visual Summaries

FIGURE 53

City of Surrey Town Centres Including Identification of Music Assets

Figure 53 specifically highlights the Surrey town centres and generally where all the music-related assets are found. As mentioned herein music-related assets are found to exist all over Surrey, with no real central or focal region of assets. Indeed, this is both an opportunity in that many people can engage with music all over Surrey, but also a challenge in that the lack of centralization can be indicative of the general lack of awareness to music activities and ability for businesses to work with one another and gain economic benefits of business clustering.

Source: Surrey Open Data and Nordicity Research

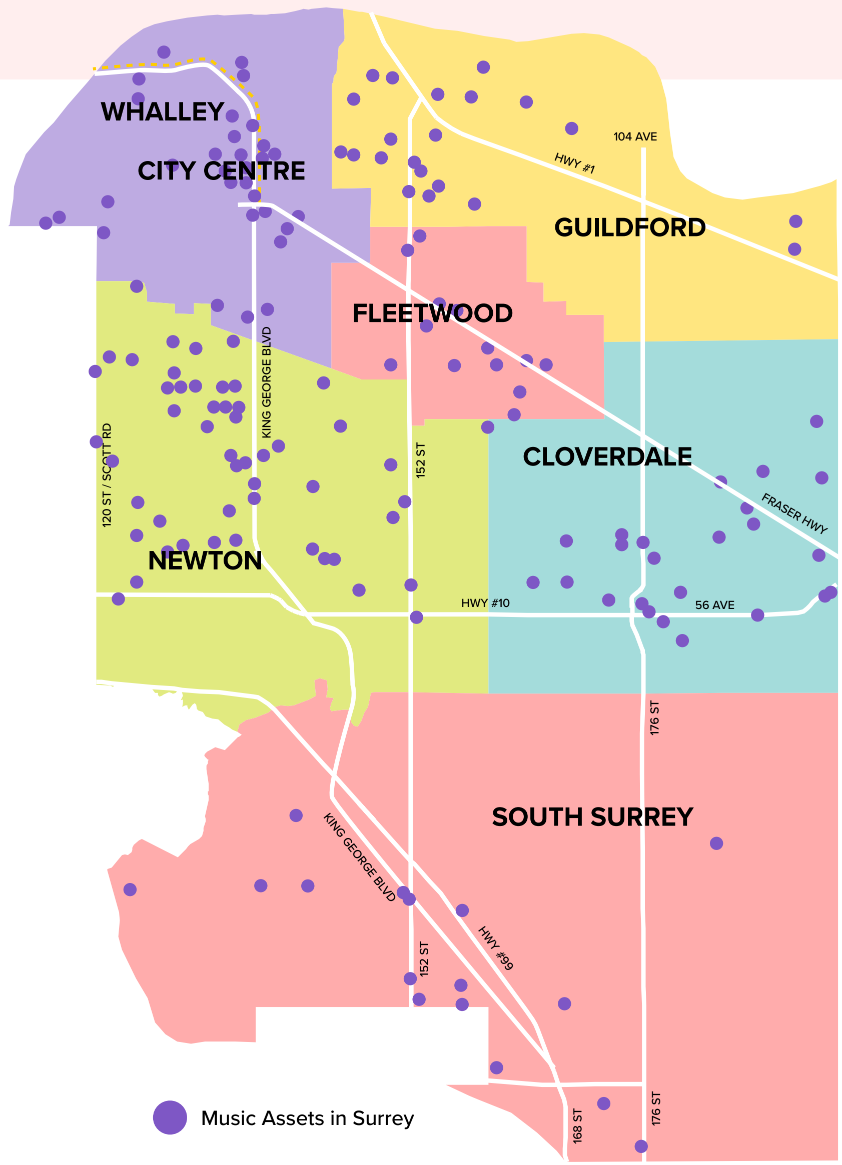


Table 19 - Rank of Greatest Number of Music-Related Assets by Neighbourhood

Rank	Neighbourhood
1	City Centre/Whalley
2	Newton
3	Cloverdale
4	Guildford
5	Fleetwood
6	South Surrey

Table 19 provides a general rank based on estimates to the number of music assets found in each neighbourhood. The greatest number of assets are found in City Centre/Whalley and Newton, with the least number of assets found in Fleetwood and South Surrey. While only some music businesses can be found in Fleetwood and South Surrey, indoor venues where music programming occurs occasionally (e.g. pubs/restaurants, community centres) do exist. Note that an exact count was not provided in the table because several assets share the same postal code and/or address in the spatial map.

Source: Nordicity Asset Identification

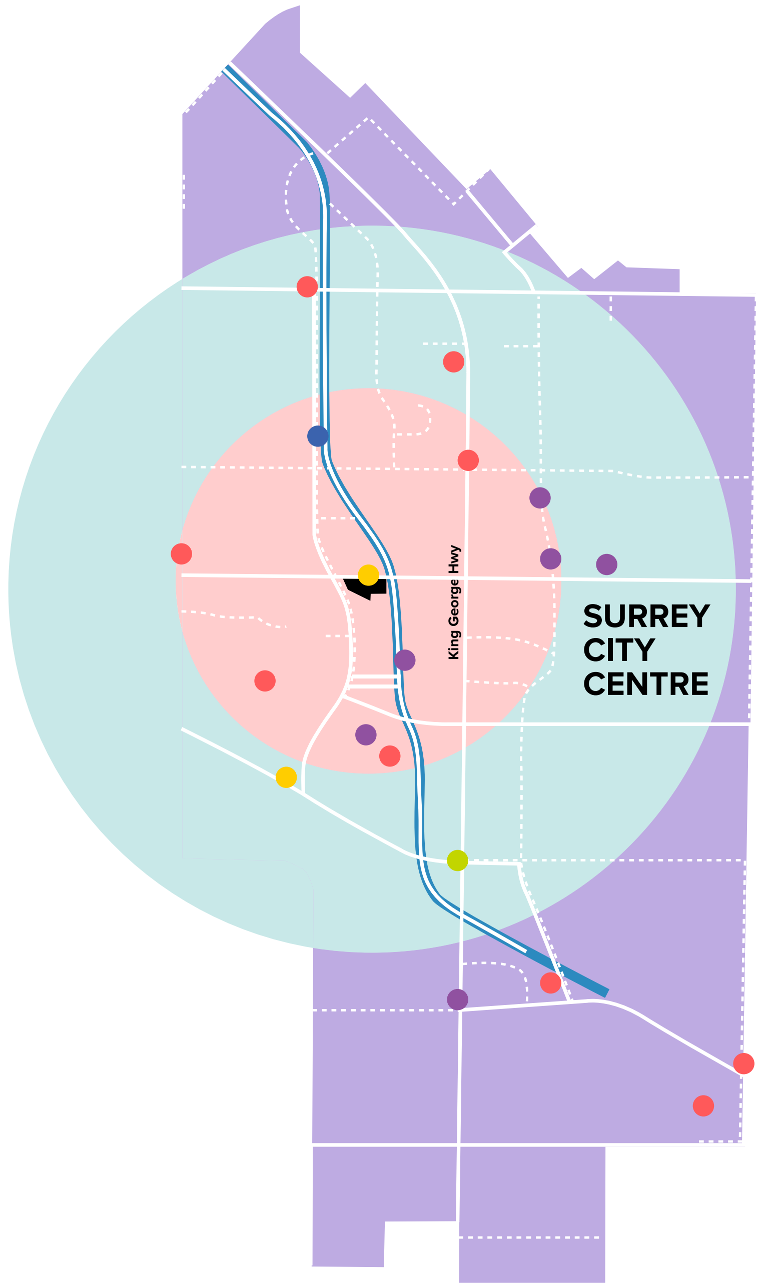
FIGURE 54

Surrey City Centre

As expected, Surrey City Centre has the densest cluster of assets, as illustrated in Figure 54. However, music assets are still relatively spread out in City Centre. Using buffer analysis (the specification of distances within the determination of a zone such as a geographic feature or building), several of the music assets found in the Town Centre are within a 1 km and 500 m walking distance from Surrey's City Hall. A general trend of such assets being close to the Skytrain and City Hall is also found. The density found in City Centre is indicative of the amount of development occurring in that neighbourhood. Indeed, the opportunity for growth in music-related assets to be centralized in City Centre is ripe given the advancement of building infrastructure (i.e. commercial opportunities), residential audiences (i.e. residential towers), proximity to public transportation (i.e. Skytrain and bus routes), and alternative modes of transportation that are centralized around City Centre (i.e. bike routes).

Note, leasing and capacity for City-owned buildings were explored for spatial mapping purposes. However, no vacancies or datasets on building capacities were accessible to the Project Team for further analysis.

Source: Surrey Open Data and Nordicity Research



Categorization of Mapped Music Assets

Table 20 - Categorization of Mapped Music Assets

Asset Type	Sub-Sectors
Indoor Venue	Venues with live music programming (e.g. restaurants, bars, clubs, pubs), halls (e.g. wedding, banquet), official performance venues (e.g. theatres, centres), informal venues (e.g. schools, churches, community centres)
Outdoor Venue	Amphitheatres, stadiums, parks, park covered areas
Music Businesses	Music education, recording studios, TV/radio/broadcasting, record label, live music production, promoter, music publisher, publicist, record store, entertainment and booking agencies, music instruments sales and equipment rentals
Music Support Organizations	Associations, non-profits, societies, clubs
Festivals	Live music festivals

Source: Nordicity Asset Identification

Learn more and view related resources

surrey.ca/music

Surrey **Music Strategy**

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