

NO: R066

COUNCIL DATE: May 15, 2023

REGULAR COUNCIL

TO: **Mayor & Council** DATE: **May 11, 2023**
FROM: **General Manager, Parks, Recreation & Culture** FILE: **0550-20**
SUBJECT: **Surrey Music Strategy**

RECOMMENDATION

The Parks, Recreation and Culture Department recommends that Council:

1. Receive this report for information; and
2. Endorse the Surrey Music Strategy, attached as Appendix “I”.

INTENT

The purpose of this report is to obtain Council endorsement of the Surrey Music Strategy (the “Strategy”).

BACKGROUND

The Parks, Recreation and Culture Strategic Plan (2018-2027) recommends that the Department “develops a strategy to advance music in Surrey”. Music planning and development have the power to create new opportunities that support artists, venues, economic growth, tourism, investment, and can strengthen the social and cultural fabric of the City. The recommendation to develop a music strategy further aligns with the overarching goals of the City’s Sustainability Charter 2.0 and Official Community Plan.

As part of the preparation leading up to developing the Strategy, the City consulted with other major municipalities in Canada who have created similar strategies, including Toronto, Vancouver, Victoria, and Kelowna. Lessons were learned from their successes and challenges. Staff created the Surrey.ca/music webpage that includes a musician and music business directory, information on funding opportunities, and music event listings. Staff also compiled research on Surrey’s music ecosystem and identified key trends and findings unique to Surrey’s music industry.

The Surrey Music Strategy was developed in three phases. Phase 1: Research & Discovery included a kickoff workshop and development of research tools, organizational assessment, interviews with senior City staff, a comparative review, creation of a Key Highlights document, and the creation of a Surrey Music Strategy Focus Group. Phase 2 was split into two parts. Phase 2A: Community Engagement included creating a Community Engagement Plan, an online survey that received nearly 2,000 responses, conducting 24 external interviews, four community roundtables, two public events, a City of Surrey Economic Development roundtable, City of Surrey Planning & Development Department roundtable, and private sector developer roundtable. Phase 2B:

Strategic Analysis included a SWOT Analysis, venue and town centre analysis, audience and survey analysis, economic impact assessment, creation of an industry profile, and a status update report. Phase 3: Strategy Development and Recommendations included creating a strategic framework, drafting the strategy, running a validation session, integrating client feedback, and creating the final Surrey Music Strategy.

DISCUSSION

The Surrey Music Strategy is a cross-departmental and industry-wide tool that provides recommendations on how best to develop a growing music economy across all Surrey town centres. By implementing the strategy, Surrey can achieve the vision of becoming a music industry leader that supports musician development and a thriving music economy.

The Surrey Music Strategy is built on seven strategic pillars that have been informed by thorough research, community engagement, and analysis. These pillars contain 23 recommendations with associated ongoing, short, medium, and long-term actions. These recommended actions are intended to be implemented over time and achieved subject to resources and partnerships. By implementing these pillars, Surrey can build a diverse, inclusive, and vibrant music scene. More information on the pillars, implementation plan, associated recommendations and actions is available on page 54 in the strategy attached as Appendix “I”.

Arts & Culture Committee

At the April 18, 2023 Arts & Culture Committee (the “Committee”) meeting, staff provided an overview of the Surrey Music Strategy. The Committee supported the strategy and recommended actions.

FUNDING

Funding for the initial implementation phase of the strategy is available in the 2023 PRC general operating budget. Funding for continued implementation will be requested through the 2024 and future budget processes. Staff will also continue to work on securing grants and sponsorships from private and public sector sources that provide specific funding for music industry initiatives.

CONCLUSION

The Parks, Recreation & Culture Department recommends that Council endorse the Surrey Music Strategy to support music development and advance new opportunities for local artists, venues, tourism and economic growth in the City.

Laurie Cavan
General Manager,
Parks, Recreation & Culture

Appendix: “I” – Surrey Music Strategy

Surrey Music Strategy





Decibel Entertainment



Surrey Latin Festival



NAAD | Surrey Civic Theatre's Digital Stage



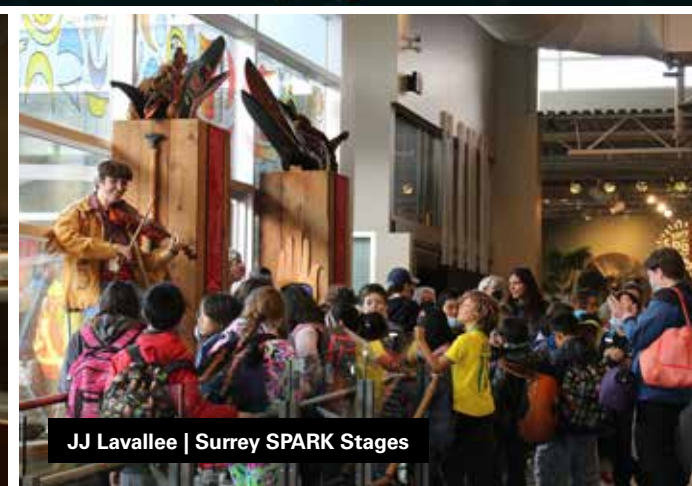
FVDED in the Park



KPU Music Program



Main Stage at Surrey Arts Centre



JJ Lavallee | Surrey SPARK Stages



5X Festival

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“Music is a powerful tool that inspires connection and cultural sharing. Developing music in Surrey will motivate the next generation of Indigenous artists to discover their musical talents and share them with their communities.”

Chief Harley Chappell
Semiahmoo First Nation



The City of Surrey is situated on the traditional, ancestral, and unceded territories of the Coast Salish Peoples, including the **q̓íçə́y̓ (Katzie), **q̓ʷa:n̓łə́n̓** (Kwantlen), and **semyámə** (Semiahmoo) land-based Nations who have been stewards of this land since time immemorial.**



Executive Summary



FVDED in the Park

Why a Music Strategy?

Surrey is Canada's up and coming Music City.

As one of Canada's fastest growing metropolitan centres, Surrey is home to a young, thriving, diverse community, and a growing music scene. Surrey is committed to **supporting local music development and strengthening the social and cultural fabric of the City.**

The Surrey Music Strategy is a cross-departmental and industry-wide tool that provides recommendations on how best to develop a growing music economy **across all Surrey town centres.**



Arts Umbrella Surrey

Music is found in all types of spaces in Surrey.

Artists perform at outdoor events in Bill Reid Millennium Amphitheatre, Holland Park, Surrey Civic Plaza, and other City of Surrey parks. Music is also regularly featured in all three of Surrey's Civic Theatres, the Bell Performing Arts Centre and in Surrey's many banquet halls. Surrey's music scene has a lot to offer.



Walk Off The Earth | Surrey Fusion Festival

Many talented, multicultural, traditional, and contemporary musicians have roots in Surrey, such as, but not limited to, Bukola, Devin Townsend, DJ Goddess, FKA Rayne, Intense, Jazzy B, Jodi Proznick, Josh Bogert, Lisa Brokop, MANILA GREY, Merkules, Robyn Sandhu, and the Surrey City Orchestra.

Surrey is also **internationally recognized for its South Asian music sector**. South Asian musicians from Surrey have millions of fans and followers around the world.



Surrey City Orchestra "Nutcracker" | Photo Credit: Silvester Law

“Music BC is proud to support the Surrey Music Strategy, which acts as a roadmap for sustainable, long-term growth of Surrey’s music economy. Through implementation, the strategy will create more opportunities for the region’s music creatives and professionals.”

Lindsay MacPherson

Executive Director | Music BC Industry Association



Music in Surrey

A total of **240 music assets** are active in the City. Music assets include venues, festivals, music businesses, and support organizations. Although spread across Surrey, the densest cluster of music assets is found in and near City Centre.

Surrey is also known for its City-led events. From Surrey Fusion Festival to Surrey Civic Theatres presentations to Sounds of Summer, Surrey hosts the **largest and highest attended municipal music events across Metro Vancouver**, with 2022's events hosting over 200,000 attendees.

Surrey's festivals have featured many internationally recognized artists including, but not limited to, April Wine, Arkells, Bif Naked, Blue Rodeo, Brett Kissell, Jay Sean, Jazzy B, K'NAAN, Los Lobos, Loverboy, Maxi Priest, Nelly Furtado, Our Lady Peace, Ranjit Bawa, Ruth B., Sam Roberts Band, Serena Ryder, Sharry Mann, and Walk Off the Earth.

Surrey is also known for hosting private festivals and concerts in its parks and venues, with 5x Festival, FVDED in the Park, Gone Country, Live Nation and Surrey Civic Theatres hosting artists including 54-40, Chubby Cree, deadmau5, French Montana, Future, Gord Bamford, Jasmine Sandlas, Jim Byrnes, JJ Lavalley, John Mann, Jojo Mason, Khalid, Krystle Dos Santos, Kygo, Mumford and Sons, Rick Ross, The Chainsmokers, The Reklaws, The PropheC, The Weeknd, The Bergmann Piano Duo, Tim Hicks, Zedd, and many more.

Throughout the City, an estimated **350,000, or 62 per cent of residents, regularly engage with music**. Additionally, it is estimated that **1.5 million attendees** enjoyed music in Surrey in 2019.

“The Surrey Music Strategy has been built on thorough engagement from Surrey’s music community. It will ensure that future music development will meet the needs of residents while championing local musicians.”

Laurie Cavan

General Manager - Parks, Recreation & Culture | City of Surrey





Surrey's Music Needs

In preparing the Surrey Music Strategy, community input was gathered to learn about Surrey's music needs. Local musicians, music businesses, organizations, and the wider public contributed through interviews, roundtables, an online survey, and public events. Community engagement was guided by Surrey's Public Engagement Strategy.

The most frequently voiced priorities included **ensuring accessibility and inclusivity in the music sector**. Audiences in Surrey want access to more free public music events, better venues, and targeted support for equity-deserving communities.

Indigenous, Black and South Asian communities reported experiencing barriers accessing support in the music industry. Specific needs included access to funding, accessible and safe venues, and greater acknowledgement of the musical contributions of racialized artists.

Youth also expressed specific needs, such as access to youth music programming and equipment, transit accessibility to music events, resources to develop young talent, and partnerships between the City and local youth organizations. **Supporting the next generation of Surrey artists is key to building a music city for years to come.**



Economic and Social Impacts of Music in Surrey

In 2019, before the COVID-19 pandemic, the Surrey music industry contributed **over \$90 million to GDP**. The industry supported **more than 2,300 jobs** and provided **over \$70 million in labour income**.

The impact of the music scene extends beyond the economic impact. Developing a vibrant music scene can **support diversity, inclusion, cultural development, and placemaking** in Surrey. Surrey can build on its unique characteristics as a destination for diverse music experiences.



What Happens Next?

Framed around seven strategic pillars, the Surrey Music Strategy is designed to ensure that music development reflects its community and its local needs.



Gone Country | Photo Credit: Angela Ruscheinski

The Strategic Pillars

- A** Amplify Surrey's Music Talent and Supportive Resources
- B** Continue Building Bridges Between the City and Surrey's Diverse Music Communities
- C** Improve Access to Places and Spaces for Music
- D** Establish Surrey's Music Identity
- E** Expand Audience Awareness and Engagement
- F** Advance Municipal Leadership and Support
- G** Encourage Music Tourism and Placemaking

By taking action in each of these key areas, Surrey can build a diverse, inclusive, and vibrant music scene.



Vision



VISION

Surrey will be a music industry leader that supports musician development and a thriving music economy.



Why a Music Strategy?

Why a Music Strategy?

As one of the fastest growing metropolitan centres in the region, Surrey has a diverse community of musicians, music businesses, industry workers, and fans. The City of Surrey produces large, municipal music events, offers annual musical programming through Surrey Civic Theatres, and hosts a range of outdoor public events and festivals. Because of these annual music activities, Surrey is a growing and thriving hub for cultural activity and artistic talent in the region.

The City recognizes the cultural and social benefits of music, and that music can be utilized as a driver of artistic development, job creation, tourism, and city brand building. Surrey's music ecosystem is also adapting to global developments, including the ongoing impact of COVID-19, live music venue challenges, calls to end systemic racism, and experimentation with new digital tools.¹

The Surrey Music Strategy will guide the City and the music industry to build a global music destination that attracts international tourism, instills civic pride, and represents all peoples and cultures through a vibrant music scene.

¹ https://www.nordicity.com/de/cache/work/80/Here_the_Beat_Nordicity.pdf



Asis Singh | Surrey Fusion Festival

Benefits of implementing a Music Strategy include:

- Cultural development and artistic growth in the community.
- Positive economic benefits for industry and artists, and spin off benefits for local businesses.
- Music tourism by creating a music destination city and associated benefits in the community.
- City brand building by attracting investment, talent, and businesses locating to the City.
- Strengthening the social fabric of the City.

Source: Terrill, A., Hogarth, D., Clement, A., & Francis, R. (2015). Music Canada. The Mastering of a Music City.

The background of the slide is a solid red color. Overlaid on this is a large, stylized sun graphic. The sun is composed of a semi-circle of thin, parallel red lines on the left side, which transition into a series of longer, radiating red lines on the right side, creating a sunburst effect. The word "Background" is centered in the middle of the slide in a large, white, bold, sans-serif font.

Background



Ranjit Bawa | Surrey Fusion Festival

Among its many recommendations, the City of Surrey's 2018 Parks, Recreation and Culture 10-year Strategic Plan called for **the development of a strategy to advance music in Surrey**. The recommendation to develop a music strategy further aligns with the overarching goals of the City's Sustainability Charter 2.0 (2016), and Official Community Plan (2013).

As part of the preparation leading up to developing the Strategy, the City consulted with other major municipalities in Canada who have created similar strategies, including the City of Toronto, Vancouver, Victoria, and Kelowna. Lessons were learned from their successes and challenges. Staff created the surrey.ca/music webpage that includes a musician and music business directory, information on funding opportunities, and

music event listings. The City also hired a **Music Planning Researcher** who compiled research on Surrey's music ecosystem and identified key trends and findings unique to Surrey's music industry.

In 2021, the City initiated a call for proposals for a consultant to work with City staff to develop a comprehensive Surrey Music Strategy. Nordicity was the successful proponent. The aim of the study was to provide future direction for Surrey's music ecosystem by acknowledging current trends, anticipating challenges, and identifying opportunities to support the sustainability of Surrey's music industry. Nordicity worked closely with the City of Surrey's Special Events and Performing Arts Sections in the development of the Strategy.



The Process

The Surrey Music Strategy was developed in three phases.

Figure 1 / Project Phases



PHASE 1

Research and Discovery

Nordicity conducted a detailed review of internal City documents that informed key thematic analyses and determined Surrey's current music climate, stakeholders, and community members. The Project Team further conducted an organizational assessment that identified the roles and responsibilities of existing City staff as well as Surrey's ability to implement the Strategy. A comparative review of innovative approaches applied in other municipalities was undertaken (e.g., Victoria, Vancouver, Brampton), as well as an analysis of the Cascadian Corridor (e.g., Seattle, Portland).

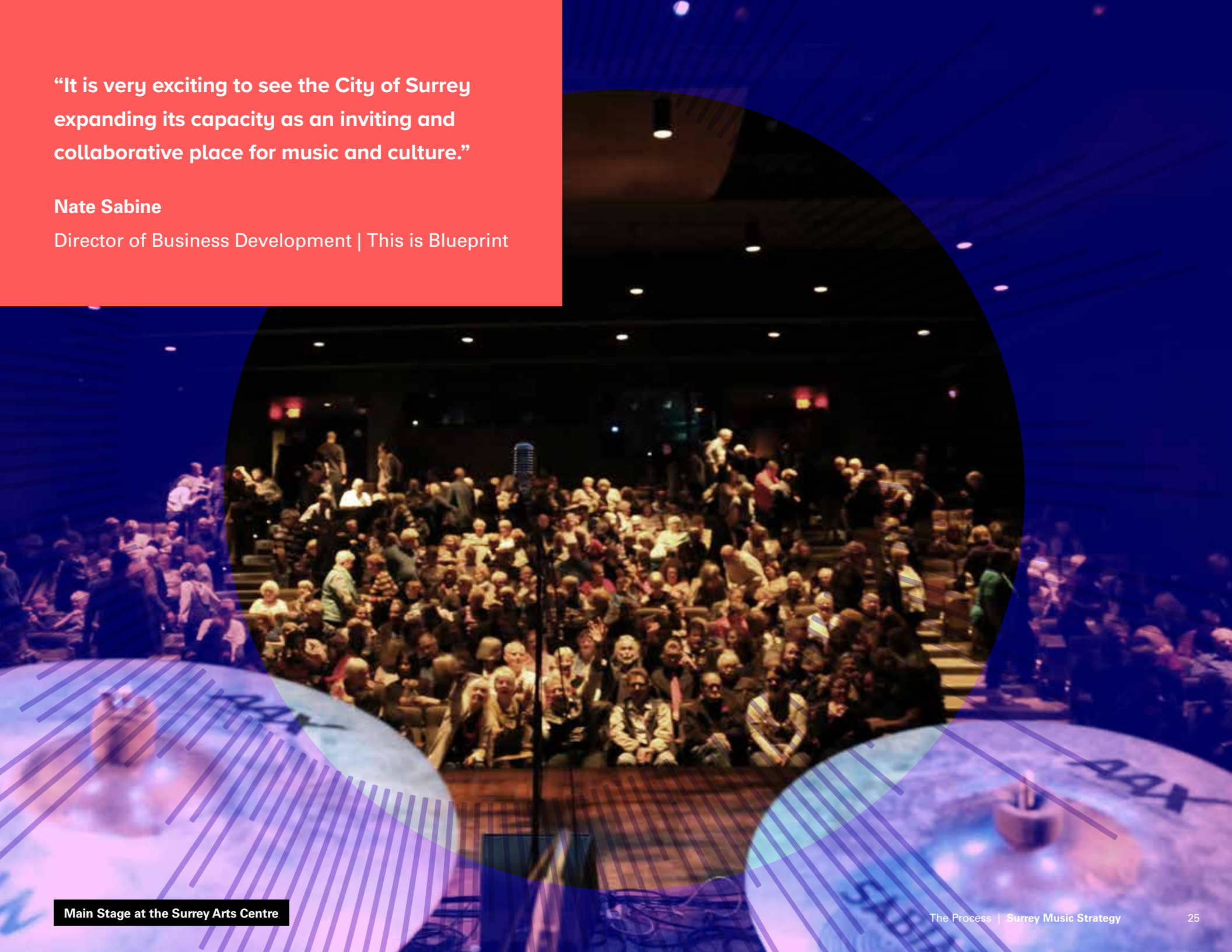


Surrey Fusion Festival

“It is very exciting to see the City of Surrey expanding its capacity as an inviting and collaborative place for music and culture.”

Nate Sabine

Director of Business Development | This is Blueprint



Main Stage at the Surrey Arts Centre

PHASE 2A

Community Engagement

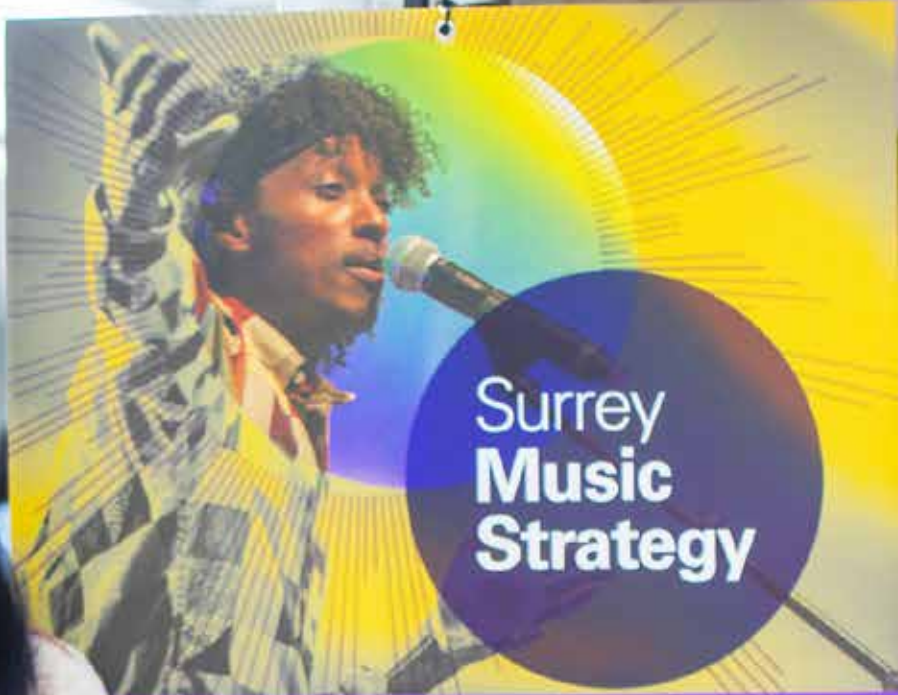
The Project Team convened an industry **Focus Group** (see Appendix C for members) which stewarded the study and served as a key sounding board throughout. Members of the Focus Group included a wide range of music industry stakeholders including music leaders, musicians, and representatives of music businesses, festivals, educational institutions, not-for-profit and equity-deserving organizations.

With support from the Focus Group, Nordicity conducted extensive community engagement to identify key strengths and challenges particular to Surrey's music ecosystem. The engagement utilized a variety of approaches, including stakeholder interviews, roundtable discussions, an online survey, and community feedback gained from various public events. A diversified approach to community engagement ensured a variety of stakeholders could voice their views on the strengths and challenges that affect the music ecosystem.

Community engagement in Phase 2 of the study was conducted and included the following:

- **Four Community Roundtables** that sought input from Indigenous, Black, People of Colour (IBPOC) and other equity-deserving stakeholders, as well as from representatives of Surrey's music businesses and organizations.
- **Three Internal Roundtables** with community experts in the areas of urban planning, economic development, and building development.
- **24 Interviews** with key stakeholders such as musicians, music businesses and local organizations (refer to Appendix B for the list of interviewees).
- **Two Public Events** at high traffic locations. One of the City of Surrey's major events, Party for the Planet, attracted over 250 passersby on April 30, 2022 with a booth that included a music prioritization activity, a quick poll survey, and a catch-all comment board. The Surrey Steps Up Youth Event on June 8, 2022, included a tent program that encouraged over 75 youth to have their say on music in Surrey.
- **An Online Survey** remained live from March 22 to May 13, 2022, garnering **1,949 total responses** from 400 musicians/music industry professionals, 149 music businesses/organizations, and 1,616 music participants².

²Note, respondents reported belonging to more than one category.



Put a post-it note on your thoughts on S

About the Strategy

emerging as the region's second downtown, Surrey is becoming a thriving hub of cultural activity, artistic talent, and is a dynamic and growing city.

The creation of a comprehensive Music Strategy will help identify priorities, provide directions, and anticipate challenges ahead in helping and supporting the music ecosystem.

The strategy will:

- Provide research and discovery of Surrey's current music ecosystem
- Identify key themes and concepts
- Provide recommendations for actionable and measurable initiatives that City staff can implement to support the sustainability of Surrey's music industry

Your input is important to ensure that the Surrey Music Strategy recommendations serve the short and long-term needs of Surrey residents.



PHASE 2B

Strategic Analysis

Following community engagement, a number of **strategic analyses** were conducted:

- A **360° SWOT Analysis** identified the strengths, weaknesses, opportunities, and threats facing Surrey's music industry, and summarized priority areas for the music ecosystem.
- A **Venue and Town Centre Analysis** was conducted for both indoor and outdoor venues, providing further understanding on the current stock of local venues suitable for hosting live music events in Surrey.
- An **Audience Analysis** of online survey responses was undertaken to illustrate Surrey's demographics, including age, gender, town centre residency, and ethno-cultural background.
- An **Industry Profile Analysis** detailed the diverse range of music businesses active in Surrey, whether commercial or not-for-profit.
- An **Economic Impact Assessment** was conducted to determine the impact of Surrey's music industry on GDP, labour income, employment, and taxes.

“Surrey is a growing City of incredible diversity. Amazing talent is developed here, and Surrey artists are recognized globally in places like Mumbai, London, and New York. I look forward to seeing Surrey continue to grow on the world map as a key player in music.”

Luv Randhawa

International Multi-Award Winning Artist







PHASE 3

Strategy Development and Recommendations

Following the extensive research, consultation, and analysis, a strategic framework was developed, consisting of high-level themes and directions. The strategic planning process also involved a **Validation Session**, resulting in key recommendations for action, an implementation plan, and finally the **Surrey Music Strategy**.



Mapping the Ecosystem



Bell Performing Arts Centre

An in-depth mapping exercise was undertaken to evaluate what music-related assets exist in Surrey. Existing lists and data were gathered through Statistics Canada's North American Industry Classification System (NAICS) codes, the City of Surrey's musician and music business database intake forms, and an extensive web-scraping exercise.

As indicated in the following image, a total of **240 music assets** were mapped across Surrey as of June 2022. All physical infrastructure, such as live festivals, outdoor venues, indoor venues, and music businesses were identified, as well as support organizations such as associations, non-profits, and societies.



Decibel Entertainment



Gone Country | Photo Credit: Angela Ruscheinski

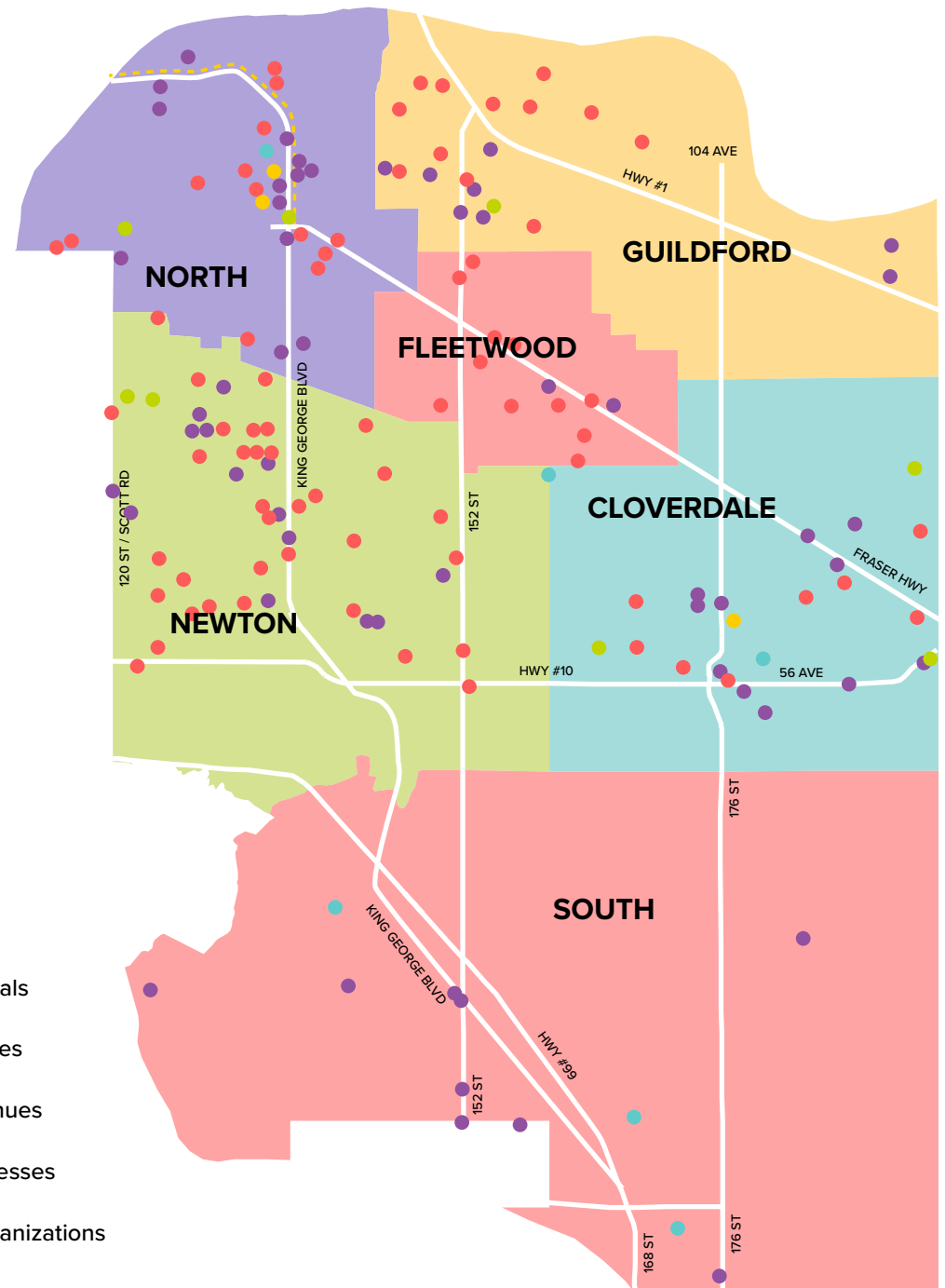
FIGURE 2

High-level Map of Music-Related Assets in Surrey Summer 2022

As depicted, music assets are spread throughout Surrey, with slight clustering occurring around key town centres.³ Note, the scattered nature of the music assets, particularly music businesses, is likely driven by work-from-home registered business addresses where businesses do not operate from a retail or commercial space. It remains notable that Cloverdale is the only town centre with a permanent outdoor stage in place, located at Bill Reid Millennium Amphitheatre. Indoor, theatre-style seated venues include Surrey Civic Theatres (Main Stage and Studio Theatre at the Surrey Arts Centre and Centre Stage at Surrey City Hall), Bell Performing Arts Centre and Chandos Pattison Auditorium.

³ Note, all locations are identified by six-digit postal codes and not exact address. Exact locations are described further in Appendix E.

- Music Festivals
- Indoor Venues
- Outdoor Venues
- Music Businesses
- Support Organizations



A Focus on Surrey City Centre

The Ecosystem Mapping identified that Surrey City Centre has the densest cluster of music assets. It is notable that several of the music assets found in Surrey City Centre are within 500m to 1km from Surrey City Hall. Surrey City Hall itself is home to two popular live music and event venues, Surrey Civic Plaza and Centre Stage.

The density found in City Centre is indicative of the amount of development occurring in this town centre. Given the advancement of commercial and residential building infrastructure, and proximity to SkyTrain, bus, and bike routes, there is a prime opportunity to increase music-related assets in this town centre.

The **City Centre Plan Update: Engagement Summary** accumulated feedback from the community regarding development of City Centre, and the following vision was created:

Surrey City Centre will be the region's second metropolitan centre and the downtown for the Fraser Valley. Regionally connected by rapid transit, City Centre will support walking, cycling, and transit. City Centre will be many things: a major employment, institutional, and commercial centre; a collection of safe, vibrant, high-density neighbourhoods; and a hub of cultural and entertainment activity. City Centre will be renowned as a 'green' downtown served by parks, plazas, greenways, planted boulevards, and fish-bearing creeks.

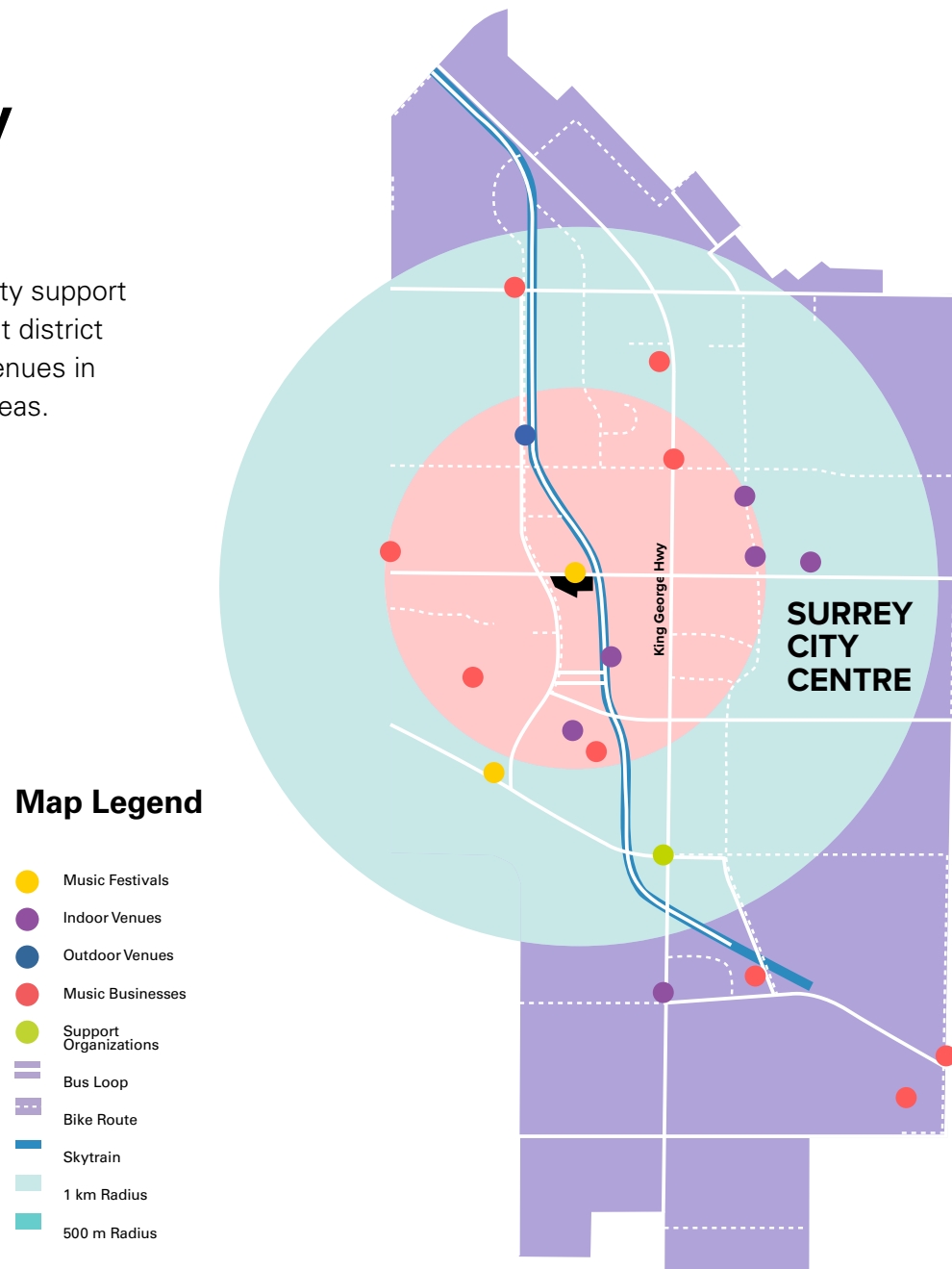


Surrey Latin Festival

FIGURE 3

Music Assets in Surrey City Centre

The public engagement process revealed community support for City Centre’s development into an entertainment district that includes new nightclubs, music, and cultural venues in Central Downtown and Historic District/Gateway areas.



“The Surrey Music Strategy has been instrumental in helping the KPU music program to understand and connect with the local music industry, which has greatly influenced the development of a new music diploma that will prepare the next generation of music artists in Surrey.”

Dr. Gordon Cobb

Digital Content Producer, Music Department
Kwantlen Polytechnic University





What We Heard

The strategic planning process involved extensive community engagement with a wide range of music industry representatives, including musicians, music businesses, and equity-deserving stakeholders. The engagement revealed key strengths and challenges of Surrey’s music ecosystem.



Table 1 - Overview of Engagement Findings

Strengths/Opportunities	Barriers/Challenges
<ul style="list-style-type: none">• Surrey’s culturally diverse community is expanding, as 45 per cent of Surrey’s population are immigrants, 67 per cent identify as a visible minority, and 2 per cent identify as Indigenous.⁴ This presents an opportunity to advance music in the city that reflects and represents all peoples and cultures.⁵• Many City of Surrey-led music events and initiatives currently exist (e.g., Party for the Planet, Surrey Canada Day, Surrey Fusion Festival, Surrey Tree Lighting Festival, Surrey Civic Theatres concerts, Band-Aid, and Basement to Stage Youth Musician Development Workshops).• Music is found in many types of spaces and places, occurring formally (e.g., traditional venues, banquet halls) and informally (e.g., parks, alternative spaces, homes, virtually).• A number of talented, multicultural, traditional and contemporary musicians call Surrey home.• The City of Surrey is home to an internationally recognized South Asian music sector.• Opportunities exist to further leverage Surrey’s music industry as a driver for economic development, including tourism.	<ul style="list-style-type: none">• The number of Surrey’s current music venues and spaces is insufficient for industry demands, including creating, rehearsing, producing, and performance.• There are not enough opportunities for Surrey’s talent to perform, gain exposure, and connect with the public.• There is a lack of educational, mentoring and performance opportunities for emerging talent in Surrey.• There is a lack of sector knowledge in terms of how to access existing grants.• Municipal and political relations with the music community needs strengthening, including actions to address systemic racism.• There is a lack of awareness by community members of Surrey’s music offerings which suggests a need for improvements in event marketing.• Some music events in Surrey lack accessibility.

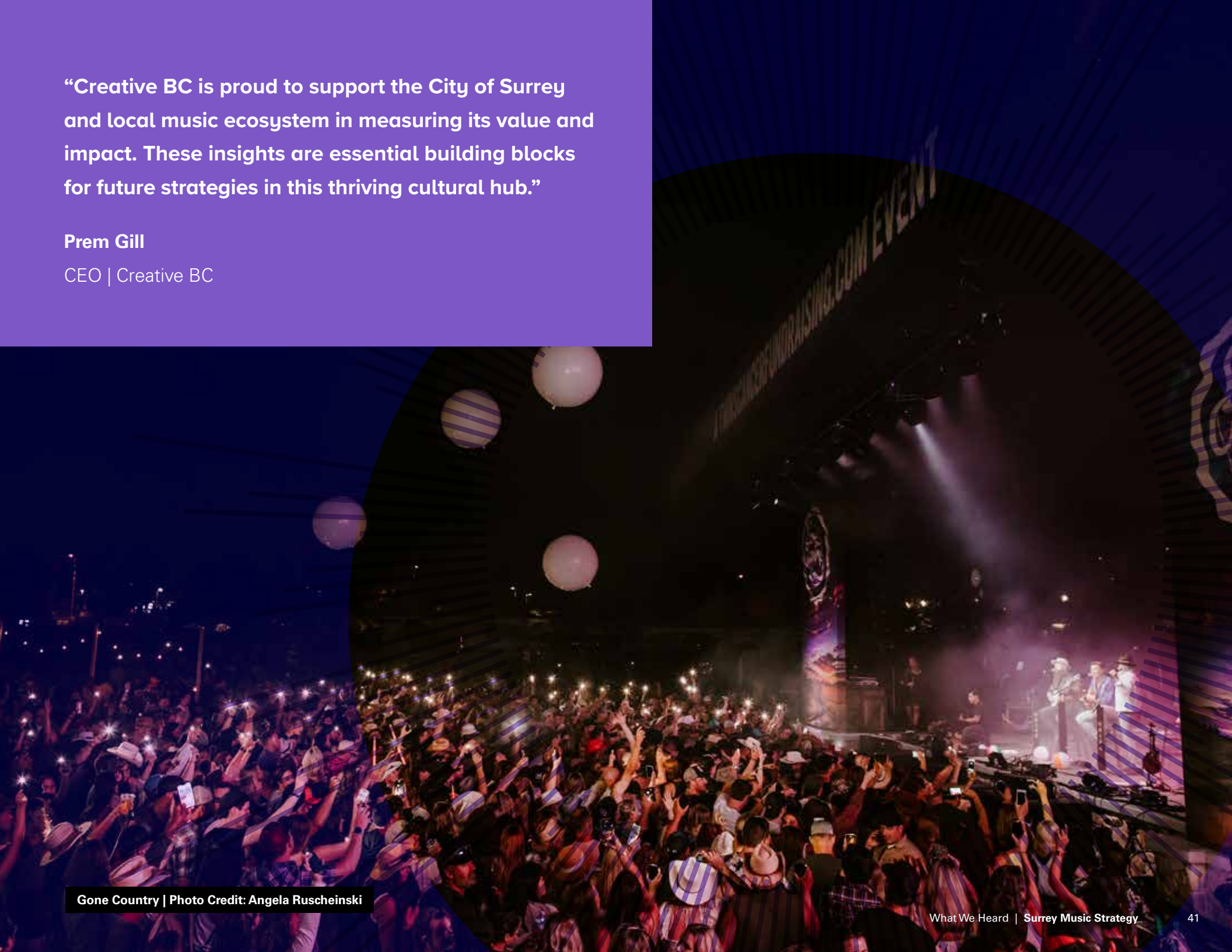
⁴ StatsCanada. <https://www12.statcan.gc.ca/census-recensement/2021/dp-pd/prof/details/pagecfm?LANG=E&GENDERlist=1&STATISTIClist=4&DGUIDlist=2021A00055915004&HEADERlist=,31,32,30,28,23,,21,19&SearchText=Surrey>

⁵ Note, survey respondents (including musicians, music participants, and music stakeholders) self-identified as follows: 49% Caucasian, 21% South Asian, 5% Filipino, 5% Chinese, 3% Latin American, 3% Indigenous, 2% South East Asian, and 2% Black, 1% Arab, 1% Korean, 1% West Asian, 1% Japanese, and 6% preferred not to answer.

“Creative BC is proud to support the City of Surrey and local music ecosystem in measuring its value and impact. These insights are essential building blocks for future strategies in this thriving cultural hub.”

Prem Gill

CEO | Creative BC



WHAT WE HEARD

Demographic Groups

Table 2 - Demographic Feedback

Demographic Group	Needs
Indigenous, Black and People of Colour (IBPOC)	<ul style="list-style-type: none">• Access to funding for IBPOC artists• Opportunities for collaboration between the City and IBPOC businesses and associations• More venues and spaces that are accessible and 'safe spaces' to create and perform• Greater acknowledgement of the work of Black artists and music businesses in Surrey's music sector• Prioritizing building stronger community/ collaboration among music industry professionals in Surrey• Deeper acknowledgment of historical and systemic racism impacting IBPOC event organizers and artists <p>Beyond the need for more free public music events in Surrey as a top priority, participants from the IBPOC stakeholder community noted the need to prioritize funding for local musicians and organizations, suggesting the limited availability of funding specific to Black, Surrey-based artists.</p>

Table 2 - Demographic Feedback (continued)

Demographic Group	Needs
<p>Indigenous</p>	<ul style="list-style-type: none"> • More live performance opportunities for Indigenous musicians • More means of inspiration and mentorship to support the next generation of Indigenous music makers and industry professionals • Support from the City to navigate what are perceived as overwhelming grant application processes <p>In comparison to overall responses, where participants typically found out about music events in Surrey through social media platforms, word of mouth and radio, the Indigenous community still values posters and flyers as the most important channel for raising awareness, followed by e-newsletters and websites/blogs. Notably, a disproportionate number of Indigenous respondents also attend music events outside of Surrey (77%, versus 33% of total respondents).</p>
<p>South Asian</p>	<ul style="list-style-type: none"> • A desire for increased recognition of the success of local South Asian artists and greater acknowledgement of their work by the City and in the community at large • Deeper acknowledgment of historical and systemic racism impacting South Asian event organizers and artists • The need for improved grant processes that recognize South Asian culture specifically <p>In comparison to the overall responses, South Asian respondents were not evenly spread across age groups. 92% were under 55 years of age. Members of the South Asian community also travel outside of Surrey to attend music events, indicative of there not being a satisfactory music offering within Surrey’s borders. In terms of attendance in Surrey, South Asian respondents typically attend Surrey music events in outdoor parks, plazas, and wedding/banquet halls.</p>

Table 2 - Demographic Feedback (continued)

Demographic Group	Needs
<p>Youth</p>	<ul style="list-style-type: none"> • Greater access to youth music programming and music equipment • Further collaboration and partnership between the City and agencies working within youth services • Greater resources dedicated to talent development • Improved public transportation to increase accessibility of music events for youth in Surrey <p>At the Surrey Youth Steps Up City event, youth participants spoke to a wide range of music needs. Beyond the desire to see greater access to youth music programming and music equipment, participants spoke to how most youth programming has been focused on classical and traditional forms of music curriculum such as choir and concert band. Youth would like to see other options to learn about some of the more modern forms of music, particularly those that use digital technology (e.g., synthesizers, amplifiers, and software applications).</p>



“The Surrey Music Strategy is proof of the City of Surrey’s pioneering commitment to supporting the development of Surrey as a national and international hub of talent.”

Sami Ghawi, MBA

Director | FUSIONpresents

Manager | Surrey Board of Trade Music City Centre



WHAT WE HEARD

Audience Analysis

An estimated
350,000
residents
engage with music
in Surrey.



84%
of survey
respondents reside
in **Surrey** and are
spread across all age
groups.

68%
Participate in
music events as
members of the public.

65%
Listen to music on local radio
stations a few times per week
with those between the ages of 25 to 54
comprising 59% of listenership.

42%
Attend live music
events every few
months with an average
of 6 events per year.

Participants hear about music events through:

72% Social media platforms

51% Word of mouth

Places where participants attend music events in Surrey:

TOP 5

- 68% Outdoor parks or plazas
- 55% Small concerts and shows
- 52% Large festivals
- 48% Official performance venues
- 43% Bars/nightclubs

49% Spend up to \$100 on music events per person, including tickets, food & beverage, merchandise during the event, etc.

Barriers to accessing music:

TOP 5

- 42% Lack of awareness of events
- 32% Limited parking
- 31% High costs
- 25% Lack of variety
- 21% Location of events

Need more...

PRIORITY

39%

Want more free public music events in the community

PRIORITY

33%

Want new and/or improved music venues

22%

Want music to be inclusive and accessible to the broadest range of participants

22%

Want improved marketing and greater awareness of music events

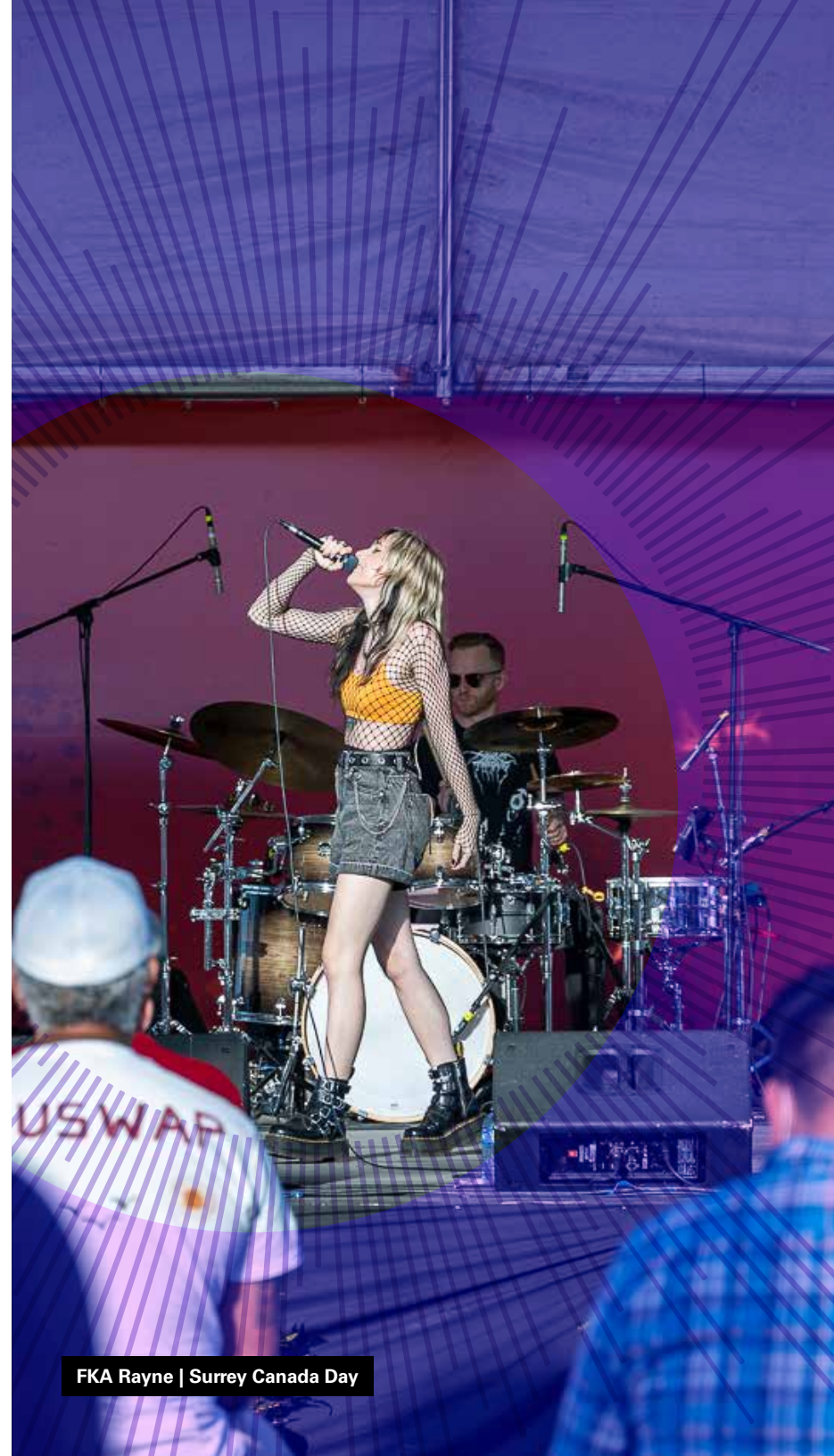
15%

Want increased funding for local musicians and organizations in Surrey

Industry Profile

Table 3 and Infographic 1 (on the following page) present a summary of the **Industry Profile** of musicians, music individuals and music businesses in Surrey.⁶ Note, for the purposes of the study, **musicians** were defined as music industry individuals who are professional artists or freelancers, while **music individuals** are those employed by music organizations or companies in the music sector. **Music businesses** (either commercial or not-for-profit) included venue operators, banquet halls, restaurant/bars, music instrument and record stores, agencies, promoters, booking agencies, music publishers, community organizations, live music and event producers (stage, sound, lighting, video), music schools/lesson centres, record labels, recording studios, practice/rehearsal spaces, instrument/audio equipment repairers, publicists, DJs and private entertainment entities, music management and others.

⁶ Note, survey respondents reported belonging to more than one category (i.e., musician, employed by an organization/company in the music industry, and/or working as a freelancer/contractor in the industry).



FKA Rayne | Surrey Canada Day

KEY FINDINGS

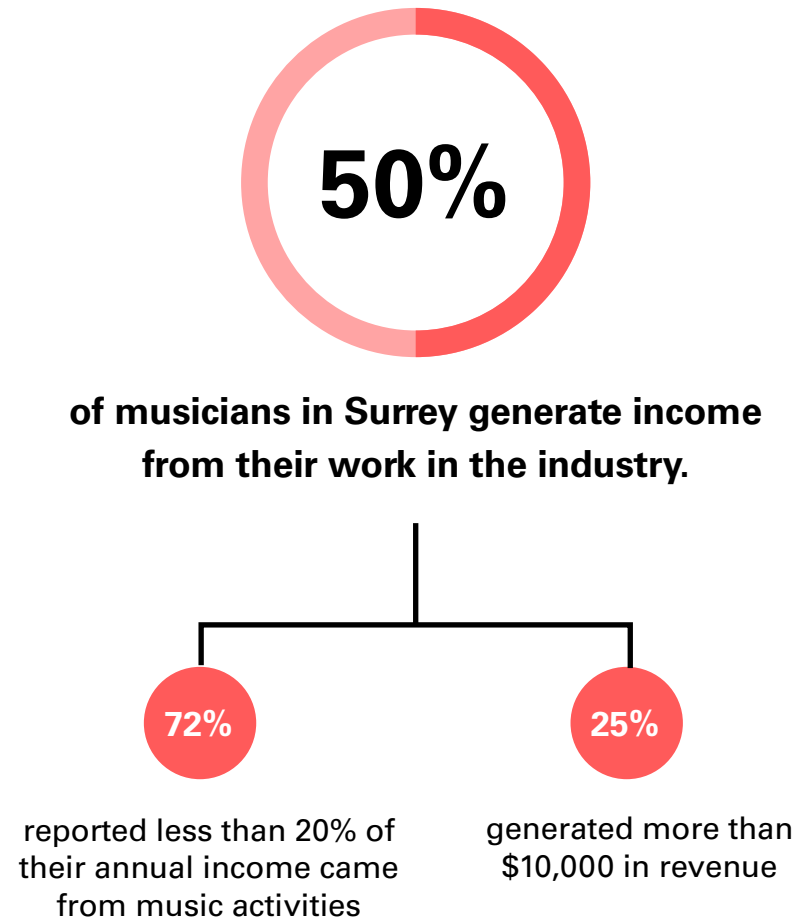
Musicians and Music Businesses

Table 3

A varied range of music businesses operate within Surrey:

- event producers
- DJs and private entertainment
- record label/production
- promoters
- music schools/lesson centers
- venue owners/operators
- instrument and equipment dealers

Infographic 1





Economic Impact Assessment

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.

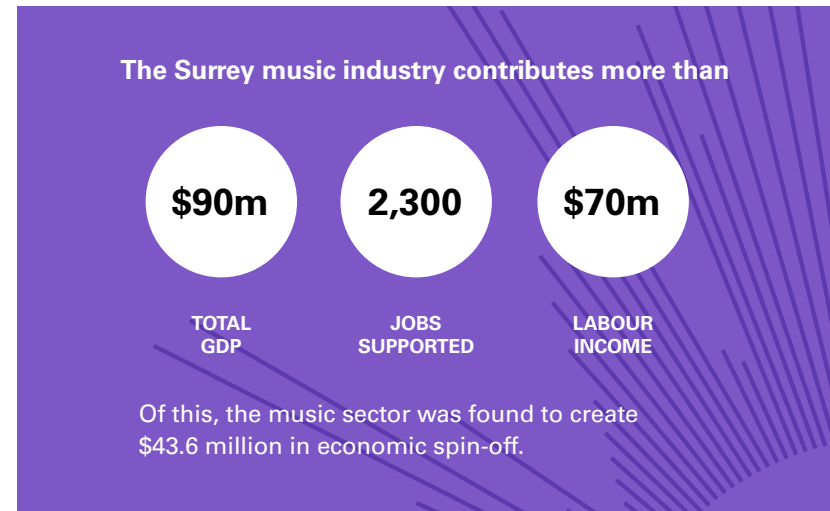


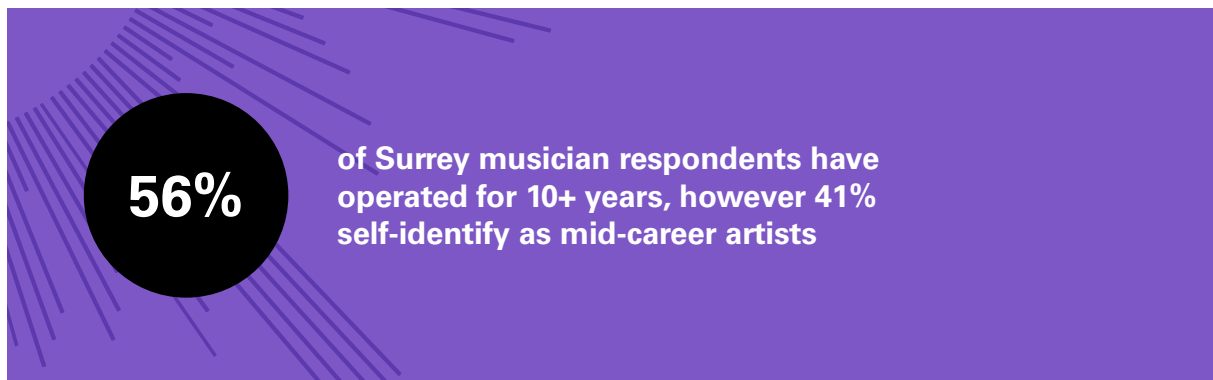
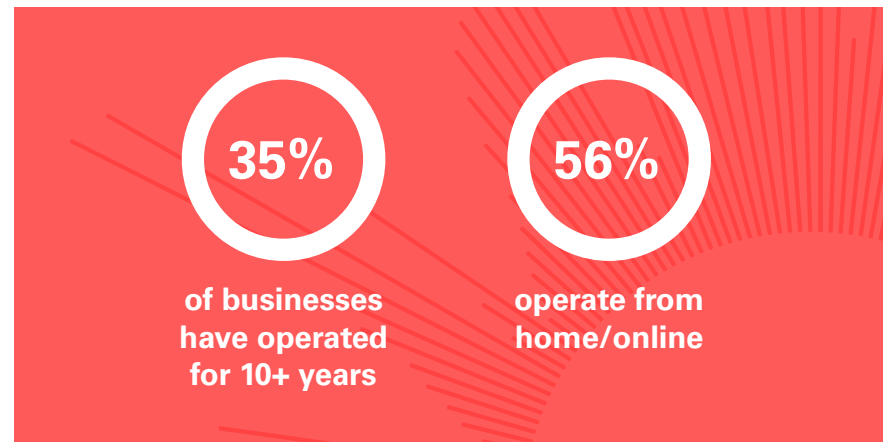
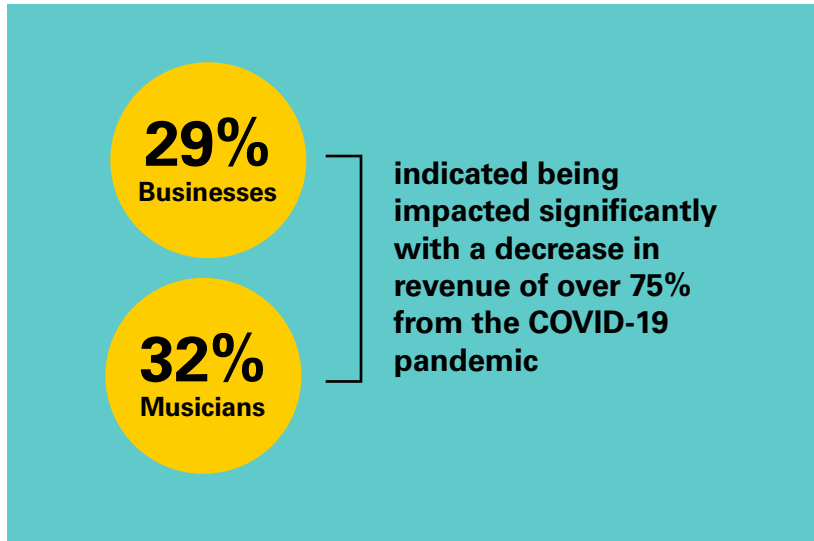
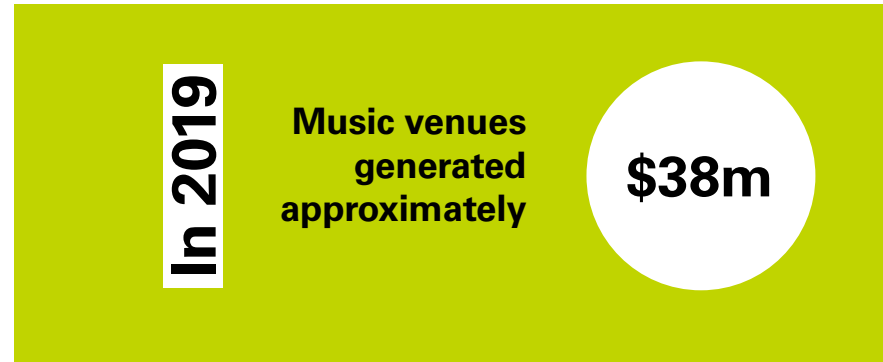
2019

Key Economic Stats⁷



⁷ All stats from Nordicity survey findings, desk research, and analysis which occurred in Summer 2022 using a baseyear of 2019. 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. View Appendix D for more details.





The complete Surrey Music Strategy's Economic Impact Assessment can be found in Appendix D.

Strategic Pillars



Informed by research, engagement, and analysis phases, **seven major strategic pillars have emerged.**

- A** Amplify Surrey's Music Talent and Supportive Resources
- B** Continue Building Bridges Between the City and Surrey's Diverse Music Communities
- C** Improve Access to Places and Spaces for Music
- D** Establish Surrey's Music Identity
- E** Expand Audience Awareness and Engagement
- F** Advance Municipal Leadership and Support
- G** Encourage Music Tourism and Placemaking



Amplify Surrey's Music Talent and Supportive Resources

Bolster and sustain support to Surrey's music stakeholders, including musicians, music organizations, and music businesses.

Building on key achievements is central to ensuring Surrey is an attractive home for music talent and music businesses alike. Surrey Fusion Festival, for example, is committed to building bridges to promote intercultural understanding, providing two days of free entertainment annually which features both locally and internationally recognized talent. The City is actively using the Surrey Musician Directory and local music research to prioritize programming Surrey-based musicians for its major events. In 2022, 40% of musicians booked had roots in Surrey.

Other initiatives such as the City of Surrey's Basement to Stage and Band-Aid youth music development workshops, and the Surrey Board of Trade's Music City Surrey Showcase offer unique opportunities for local artists and young people to develop skills and connect with new audiences and other musicians. The City has also expanded partnerships with the local music industry, as the Basement to Stage program has

been supported by partial funding from Live Nation Canada. Surrey's new Clayton Community Centre also has music and performing arts studios, advancing access and opportunity for performance and skill development.

More work can be done, however, in ensuring Surrey's music ecosystem supports all its music makers, particularly its flourishing young talent. Lack of awareness of opportunities for capacity building, mentorship, and performance remain challenges amongst the music community, with many young people "not knowing where to start." While regional music education institutes like Nimbus School of Music and Sarah McLachlan School of Music are well known and provide some programming in Surrey, there is a strong appetite for comparable, local, and affordable music education opportunities.

It is worth noting that Kwantlen Polytechnic University has recently launched music courses in their program offerings, including technical instruction, music technology, and musicology. The need for more support and advancement opportunities for Surrey's equity-deserving groups was also a consistent finding.

A Amplify Surrey’s Music Talent and Supportive Resources

Recommendations	Proposed Actions
<p>1. Expand artist development opportunities for local artists at all career stages to entice and retain Surrey’s music talent.</p>	<p>Continue to prioritize providing live performance opportunities to Surrey musicians at the City’s major events, Surrey Civic Theatres, and other civic programming.</p>
<p>2. Improve music sector development opportunities and initiatives to propel greater collaboration, partnership and knowledge exchange between the industry, government, and Surrey’s music community.</p>	<p>Launch an annual, partnership-led Surrey music industry conference to facilitate professional development, capacity building, and networking opportunities.</p> <p>Endorse a Surrey Music Strategy Task Force comprised of key community and industry stakeholders to support the implementation of the strategy.</p>
<p>3. Ensure youth-specific initiatives include music education partnerships to develop a strong and sustained talent pipeline.</p>	<p>Develop a Surrey Music Fund through collaborative opportunities with other levels of government and regional organizations such as Music BC and Creative BC. Ensure music grant funding opportunities are known, accessible and supportive of Surrey’s diverse range of talent, particularly emerging artists.</p>
<p>4. Develop policies and incentives that ensure fair compensation for performers.</p>	<p>Consider expanding Surrey’s Cultural Grant Program to include a ‘music collaboration stream’ to encourage cross-disciplinary activity within Surrey’s music sector (e.g., animation + musical composition/scoring, dance performance + live music).</p> <p>Promote the notion of engaging youth through mentorships and placements across Surrey’s music industry. Consider having City staff collect and share opportunities offered by organizations and businesses.</p> <p>Consider collaborative opportunities between the City, music education institutions, and regional bodies (e.g., Music BC, Creative BC) to ensure broader access for Surrey youth to music instruments, affordable tuition, in-demand music programming, and grant opportunities.</p> <p>Continue the Surrey Music Strategy’s dedicated brand and marketing, ideally within a broader City of Surrey Cultural Services brand identity.</p>

- Ongoing
- Short-Term: 0-2 years
- Medium-Term: 3-5 years



Continue Building Bridges Between the City and Surrey's Diverse Music Communities

Leverage the Surrey Music Strategy to address systemic racism and ongoing challenges in ensuring equitable and inclusive representation and support to Surrey's music communities.

Surrey's demographics reflect the global majority with a total visible minority population of 67%, including 38% identifying as South Asian. Across the globe, issues around exploitation and inequities in the music industry (and beyond) have come to the forefront, particularly for IBPOC artists, women, and 2SLGBTQ+.

The City's Special Events Section strives to program musicians that reflect the diversity of Surrey, including a minimum of 70% IBPOC and/or equity-deserving artists at all major events, with 20% of this dedicated to Indigenous cultural sharing and contemporary performances. Surrey's diversity is considered one of its music ecosystem's biggest strengths. This drives the Surrey music offer to include a variety of traditional and contemporary genres, and a strong pool of local, high-quality talent. For example, while artists, content, and themes of Surrey Civic Theatres shows can vary significantly year to year,

inclusion, diversity, equity and accessibility are fundamental priorities of the curatorial strategy behind planned programs.

Additionally, 100% of the City's 2022 cultural grants were awarded to organizations that support equity deserving groups in some capacity. Of those cultural grants, 73% went to organizations that represent equity deserving groups. Beyond representation, however, the City of Surrey is committed to ensuring equity, diversity and inclusion remain at the very centre of the Surrey Music Strategy.

Through the strategic planning process, persisting barriers to working collaboratively with Surrey's equity-deserving music groups became evident. The Surrey Music Strategy will assist in breaking down barriers both inside City Hall and across the broader music community. Equity-deserving groups require ongoing invitation for dialogue, increased visibility in the community through performance opportunities and marketing initiatives, and active engagement in City music related processes.

B Continue Building Bridges Between the City and Surrey’s Diverse Music Communities

Recommendations	Proposed Actions
1. Ensure that the City’s support to industry is built upon a stronger foundation of collaboration and feedback with equity-deserving communities.	Continue to ensure and sustain booking a diverse and equitable representation of IBPOC and other equity-deserving musicians to perform at City-led events.
2. Expand City-driven music funding, programming, and initiatives targeting equity-deserving communities.	Foster networking opportunities , with local and national music organizations representing equity-deserving groups (e.g., City of Surrey and music industry representatives attending summits, events, showcases).
3. Acknowledge and celebrate that Surrey’s diverse music ecosystem drives its vitality and success.	Ensure representation of equity-deserving stakeholders in culture-related advising committees .
	Ensure the City’s Equity, Diversity, and Inclusion commitments and value statements are reflected in its cultural granting program eligibility criteria for third parties.
	Encourage promotion of achievements by equity-deserving musicians through the City’s culture-related marketing and communications strategies.
	Expand City partnerships with Surrey’s equity-deserving music organizations to enable broader performance and professional support opportunities, particularly outside City Centre.
	Advance opportunities for participation for equity-deserving groups by ensuring Surrey’s music programming and presentation events are low-barrier, low cost, accessible, and welcoming/safe spaces for all.

- Ongoing
- Short-Term: 0-2 years
- Medium-Term: 3-5 years



Improve Access to Places and Spaces for Music

Ensure there are versatile spaces in Surrey to create, rehearse, produce, perform, record, and enjoy music.

The Surrey music community has clearly voiced that existing spaces in the city do not sufficiently meet their needs, nor those of its audiences. Residents regularly leave the city's borders to attend large scale indoor shows in Vancouver and Abbotsford due to the lack of a large-scale venue in Surrey. Even smaller venues are often insufficient for many types of music rehearsals and performances, and businesses perceive that some municipal policies can be a significant barrier to opening new doors.⁹ Outdoor spaces and parks are seen as a key asset in Surrey's music ecosystem, but some currently lack supportive, sustainable infrastructure, including permanent, covered stages, to ensure optimal, affordable year-round usage.

The accessibility of places and spaces is also a concern for music stakeholders in Surrey. The city's dispersed geographic layout is a challenge for attracting loyal audiences, and parking and accessible transit are cited as significant challenges for attendees.

A key pillar of the Surrey Music Strategy is to ensure that spaces and places for music become more accessible and welcoming to all musicians and audiences. Promising advancements are already afoot, such as Concord Pacific's Piano residential development, which will incorporate music related infrastructure including rehearsal and performance space. Clayton Community Centre's new black box studio is ideal for a variety of music events up to 200 people. Furthermore, other City managed public gathering spaces and infrastructure are being improved to be more music-friendly such as the North Surrey Stadium, Bear Creek Athletics Centre, as well as the renovated Chuck Bailey Recreation Centre and future Surrey Interactive Art Museum which will feature small to medium sized performance spaces.

The City also recognizes the value that 'virtual space' holds for production and collaboration across the music industry, and the need for the development of digital skills. For example, Surrey Civic Theatres are equipped to provide livestreaming performance and recording opportunities for musicians.

⁹Examples provided included tenancy, business licensing, noise bylaws, and zoning.

C Improve Access to Places and Spaces for Music

Recommendations	Proposed Actions
<ol style="list-style-type: none"> Leverage underutilized and vacant spaces across the city. Ensure existing rehearsal, recording, and performance spaces are accessible and affordable. 	<p>Build closer relationships between the City and Surrey’s music venues and cultural spaces to better understand their current challenges and opportunities, while exploring policies and incentives to encourage their on-going retention, repurposing, and operation.</p>
	<p>Champion digital ‘spaces’ by identifying digital education and collaboration opportunities that allow Surrey’s music industry to connect with audiences, artists, businesses, and investors locally and globally.</p>
	<p>Identify opportunities to work together with Surrey developers on a longer term vision of a cultural/entertainment district in City Centre (e.g., mixed-use residential/office/performance spaces, credit model for developers building community cultural spaces).</p>
	<p>Conduct a cultural facility assessment of venues in Surrey that could be suitable for all stages of music development – from rehearsal to production to performance spaces. The assessment will include both City-owned and third-party spaces.</p>
	<p>Conduct an accessibility evaluation of Surrey’s outdoor venues in terms of transit, parking, and economic impact, to determine how to better utilize these spaces for music (e.g., install more permanent and temporary infrastructure in City parks for live performance).</p>
	<p>Identify community-led opportunities to support music hubs and incubators where artists can gain access to resources and support, particularly for young, emerging artists and producers.</p>
	<p>Advocate for affordable, dedicated music spaces as part of development applications:</p> <ul style="list-style-type: none"> Ensure the City’s Culture Division is present for discussions related to the City’s Official Community Plan (OCP), Town Centre Plans, Neighbourhood Concept Plans (NCPs) and other planning processes. Explore inclusion of cultural and music-related assets as part of Community Amenity Contributions (CACs) and/or Density Bonusing in NCPs.

- Ongoing
- Short-Term: 0-2 years
- Medium-Term: 3-5 years
- Long-Term: 6-10 years



Establish Surrey's Music Identity

Increase Surrey's visibility as a Music City in Metro Vancouver and beyond.

The City of Surrey wants to support realizing the full potential of its music economy. In doing so, the goal is to create a sustainable music community where artists and professionals know that it is possible to build and sustain successful careers, and where audiences know they can find a range of high-quality music experiences. Additionally, this is where multi-level government leaders invest in both hard and soft supportive city infrastructure as they recognize the economic, social and cultural benefits of music.

Acknowledging the key principles of Music Cities¹⁰, the City of Surrey is keen to build a stronger reputation in Metro Vancouver for its music community, thereby attracting and retaining investment and talent. This includes young workers who put a high value on the quality-of-life attributes of where they live, work and play. As a growing metropolis in the province, there is a real opportunity to differentiate Surrey's music offer from other cities through more affordable spaces to rehearse, create, and perform as either a local or touring artist.

Crucially, a Music City protects, celebrates, and builds upon its music history as a means of establishing its contemporary self-identity and brand. For example, knowing Surrey is home to internationally recognized South Asian artists is a key part of its past and present story.

The Surrey Music Strategy Survey clearly evidenced Surrey residents' huge appetite for free, outdoor events. In response, there are opportunities to learn from other municipalities which have been investing in the growth of their live performance scenes. Ottawa's City Sounds initiative, for example, saw the City support paid performance opportunities for local musicians to play for live audiences, encouraging locals to attend free music performances while exploring new neighbourhoods.

¹⁰ Terrill, A., Hogarth, D., Clement, A., & Francis, R. (2015). Music Canada. The Mastering of a Music City.

D Establish Surrey's Music Identity

Recommendations	Proposed Actions
<ol style="list-style-type: none"> 1. Continue promoting the Music in Surrey brand. 	<p>Participate in recognizing Surrey as a major South Asian music hub of Canada through communications, branding, and public engagement work.</p>
<ol style="list-style-type: none"> 2. Leverage music to celebrate Surrey's diverse cultural makeup. 3. Ensure Surrey is recognized as a key regional player in music. 	<p>Entice music professionals and audiences from Metro Vancouver to see Surrey as an affordable and accessible space to rehearse, record, perform, and experience local, national, and international musicians.</p>
<ol style="list-style-type: none"> 4. Highlight and celebrate Surrey as a major South Asian music hub of Canada. <p> ● Ongoing ● Medium-Term: 3-5 years </p>	<p>Work with community groups and promoters to create City-led music series (e.g., "Sounds of Surrey") to showcase a range of music in Surrey's versatile spaces (e.g., Civic Theatres, Special Events, temporary pop-up experiences).</p> <p>Explore opportunities to establish partnerships and/or alignments with other Music City leaders in the Cascadian Corridor including Vancouver and Seattle Music Offices for artist exchanges, residencies, existing music initiatives, and industry symposiums.</p>



Expand Audience Awareness and Engagement

Advance opportunities for Surrey audiences to participate and celebrate.

Live performance opportunities in appropriately-sized venues for a given career stage help artists hone their skills and build a fanbase. Surrey's vibrant music community, however, remains hungry for more visibility and connectivity, particularly in the shadow of Vancouver's entertainment options. Many artists, particularly emerging artists, currently find it difficult to gain traction and develop their audiences. Transportation and parking challenges, lack of promotion and awareness (e.g., centralized database), and limited all ages venues contribute to some of the barriers to audience development in Surrey.

There is real potential in leveraging the City of Surrey's communication channels for greater coordination of the music scene's marketing and promotion, as well as ensuring City-led music events and programming remain affordable and accessible to a wide range of income groups. Working with neighbouring cities to create touring circuits can also ensure audiences have the opportunity to catch their favourite acts without needing to travel.



E Expand Audience Awareness and Engagement

Recommendations	Proposed Actions
1. Leverage the public appetite for live music experiences in Surrey.	Create and promote a public, centralized music directory of Surrey musicians and music businesses.
2. Ensure music events and programs are accessible to as many audiences as possible.	Improve marketing of Surrey’s music offer through the City’s communication channels and those of partner organizations in order to support the growth of Surrey’s engaged music audiences.
3. Incentivize audiences to spend time in Surrey before and after music events.	Review transportation services, zoning, liquor and business licensing, extended venue hours, public safety measures to improve the entertainment environment and remove music sector barriers .
	Encourage sliding-scale discount ticketing approaches across Surrey’s music events and programming (both City-led and third party-led) to make them more affordable and accessible to different income groups.
	Create a late-night economic policy that will improve live music in Surrey and encourage audiences to spend time in Surrey before and after music events.
	In longer term planning initiatives, consider clustering of venues across Surrey’s town centres to attract larger audiences.

- Ongoing
- Short-Term: 0-2 years
- Medium-Term: 3-5 years
- Long-Term: 6-10 years



Advance Municipal Leadership and Support

Create a welcoming environment for music to thrive.

The Surrey Music Strategy supports a future-facing roadmap for the City of Surrey to reach its goals in becoming a Music City, building on what has already been substantial work to date. The City's 'Music in Surrey' webpage, for example, will become a resource for musicians, music-related businesses, and not-for-profits to apply to be listed on new directories and gain visibility across the sector. The Surrey Board of Trade's Surrey Music City Centre is yet another initiative aimed at creating a vibrant and diverse local music economy that facilitates opportunities for artists, businesses, and community members.

One of the key goals of the Surrey Music Strategy is emphasizing and promoting the importance of Surrey's music sector across other City departments. It is valuable to leverage internal resources to help create a more equitable, accessible, socially impactful and commercially vibrant music economy. Valuable lessons can be learned by creating music-friendly and musician-friendly policies via cross-departmental collaboration to improve bylaws, regulations and/or licensing. In the face of urban growth and competing demands for space, land-use planning, for example, is one area of municipal policy affecting the development of local music economies.



Curtis Clearsky & The Constellationz | Surrey Fusion Festival

F Advance Municipal Leadership and Support

Recommendations	Proposed Actions
<p>1. Position the City of Surrey as a music leader by acting as a key liaison and coordinator in Metro Vancouver’s music scene.</p>	<p>Work with other City Departments to integrate more music opportunities into existing City programs and initiatives via recreation facility infrastructure planning and Cultural Community Amenity Contributions.</p>
<p>2. Align the Surrey Music Strategy with Economic Development to support the creation of a resilient music economy that attracts private enterprise, supports music creation, and provides performance opportunities.</p> <p>3. Ensure music-friendly City policy and regulatory approaches.</p> <p>4. Diversify grant and funding models to ensure a broad range of support is available to musicians and music businesses no matter their stage of development.</p>	<p>Establish a Music Office—similar to the Surrey Film Office—with a new staff position (e.g., Music Liaison) to act as the contact point between the City and the music industry. The Music Office will have responsibilities that include, but are not limited to:</p> <ul style="list-style-type: none"> Working with the Industry Task Force to implement the Music Strategy; Maintaining the Music in Surrey webpage, musician and music business directories; Coordinating music-related marketing and promotion campaigns; Leading ongoing collaboration between the City, community, and developers; and Providing advice and assistance to the public and industry to navigate policy and regulations on music in Surrey.
<p>5. Support collaborations and partnerships across the music ecosystem that spark cross-disciplinary and cross-sectoral relationships, as well as empowered community-led initiatives.</p>	<p>Expand the Music in Surrey resource page on surrey.ca to act as an online central resource for the musician and music business directories, permit applications, grant information for musicians, permit and funding assistance, and a calendar of events and activities.</p>
	<p>Review regulatory approaches around venue policies at the City in terms of all age shows, parking, noise bylaws, etc.</p>
	<p>Support development of a busking program that is low cost, travels to different town centres, and showcases Surrey’s emerging artists. Consider a centralized payment system for buskers.</p>
	<p>Increase accessibility and availability of grants and funding for musicians by establishing a Surrey Music Fund, as well as providing info sessions for local artists on how to navigate the City’s grant processes.</p>
	<p>Consider an instrument lending library in collaboration with Surrey Public Libraries, Clayton Community Centre and/or potential corporate sponsors.</p>

- Ongoing
- Short-Term: 0-2 years
- Medium-Term: 3-5 years
- Long-Term: 6-10 years



Encourage Music Tourism and Placemaking

Position Surrey as a music destination.

Music stimulates tourism, attracts major events, and improves a city's vibrancy. These are key ingredients for city-building. As Surrey develops its tourism and attraction strategies, there are opportunities to align them with its growing music scene, expand its market capabilities, and promote more music events throughout the year, particularly during peak festival season. For example, music tourism in Austin, Texas—a well-known, longstanding music destination—accounts for almost half of their US\$1.6 billion economic output and contributes US\$38 million in tax revenue to the city.¹¹

Of course, real challenges face Surrey including both a lack of performance spaces and a centralized entertainment district.

However, key pockets of activity are helping to build unique identities within Surrey, including Cloverdale as a destination for country music. As required infrastructure and park spaces improve in terms of functionality and accessibility, Surrey could easily become a city included in West Coast touring circuits, particularly for bands leveraging proximity to American hubs across the Cascadia Corridor in Portland, Oregon and Seattle, Washington.

There exists unique potential in Surrey to advance music tourism and destination events that attract visitors, build local audiences, and provide new platforms to showcase local talent. Along the way, it becomes important to ensure music tourism in Surrey remains authentic to its roots, has meaningful cultural and economic impact, balances the needs of residents, and benefits artists.

¹¹ Angelou Economics and C3 – Economic Impact Study 2019

G Encourage Music Tourism and Placemaking

Recommendations	Proposed Actions
<ol style="list-style-type: none"> 1. Increase attendance at Surrey festivals and events from outside of Surrey, fostering the city's music identity and reputation. 	<p>Engage presenters across Metro Vancouver to consider facilitating regional touring circuits, fostering new partnerships and collaborations, and furthering music sector resilience in the COVID recovery.</p>
<ol style="list-style-type: none"> 2. Make Surrey a welcoming place for regional and global artists to tour. 	<p>Create a streamlined system of collecting ticketing and audience data at Surrey music events to better analyze and identify potential initiatives to increase tourism impacts.</p>
	<p>Work with business and tourism partners (e.g. Business Improvement Associations, Destination BC, Discover Surrey, Music BC, Surrey Board of Trade) to create a Music Tourism Strategy and program music that showcases local talent within retail, destination marketing, transit hubs, visitor experiences, and key attractions.</p>
<ul style="list-style-type: none"> ● Short-Term: 0-2 years ● Medium-Term: 3-5 years ● Long-Term: 6-10 years 	<p>Attract high-visibility, large-scale music industry events to Surrey (e.g., JUNO Week, BreakOut West).</p>





**Learn more and view
related resources
surrey.ca/music**

Surrey Music Strategy



surrey.ca/music

Surrey Music Strategy

Appendix



A man with dark hair, wearing a green jacket over a white t-shirt, is singing passionately into a microphone. The background is a warm, reddish-pink hue with a sunburst pattern of thin red lines radiating from behind him. A large purple circle is overlaid on the left side of the image, containing the text "Let's talk music." in white and yellow.

**Let's talk
music.**

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Note: Figure and citation numbers are continued from the primary Surrey Music Strategy document.



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 1,858¹¹ 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.

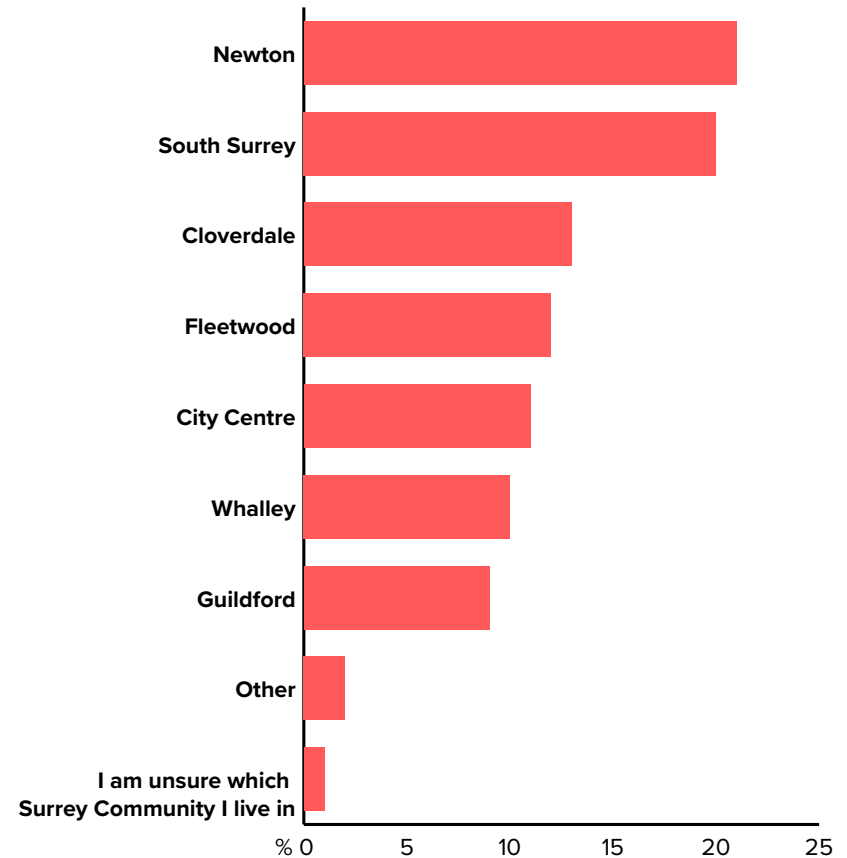
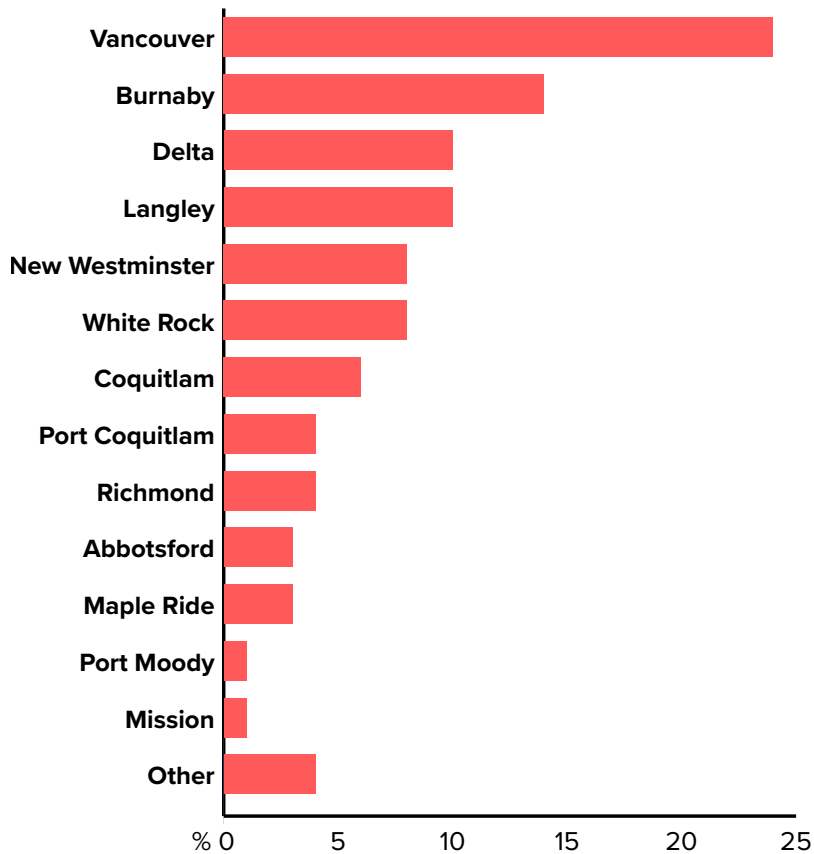


FIGURE 5

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 Westminister, 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)

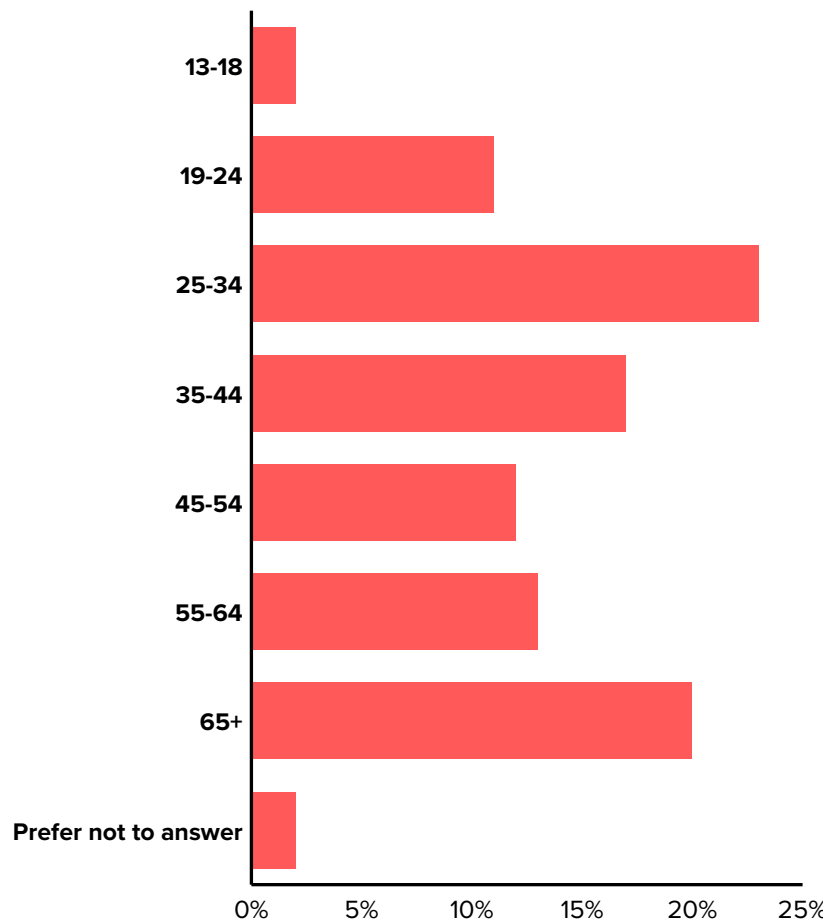


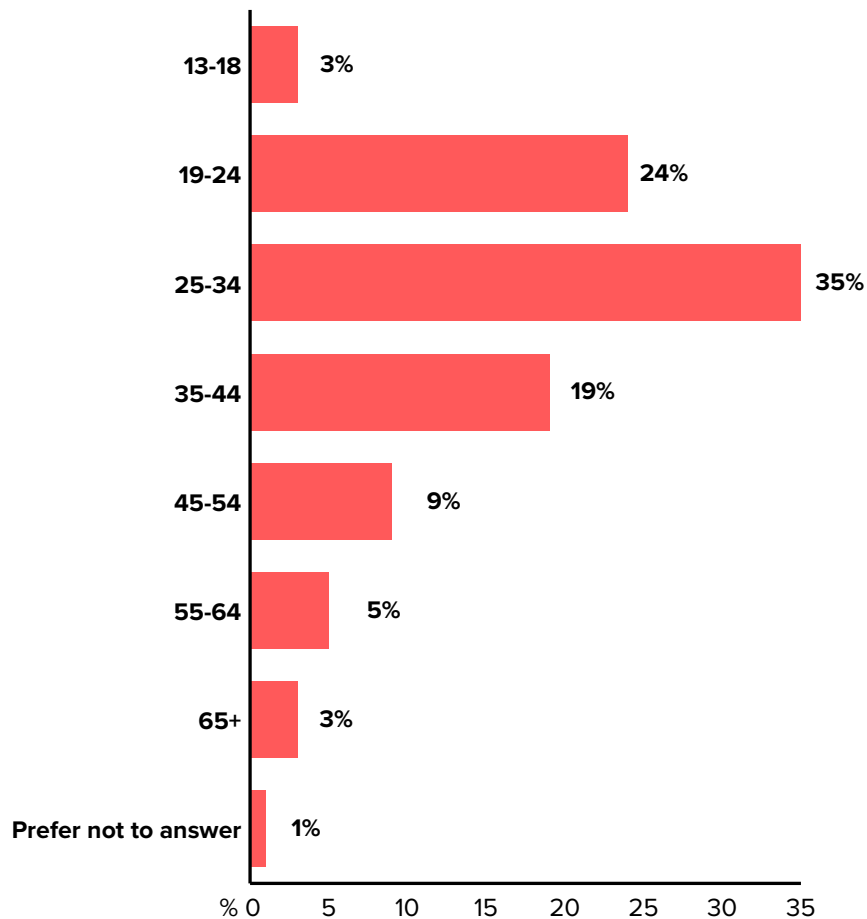
Figure 6 indicates the age range of survey respondents.

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)

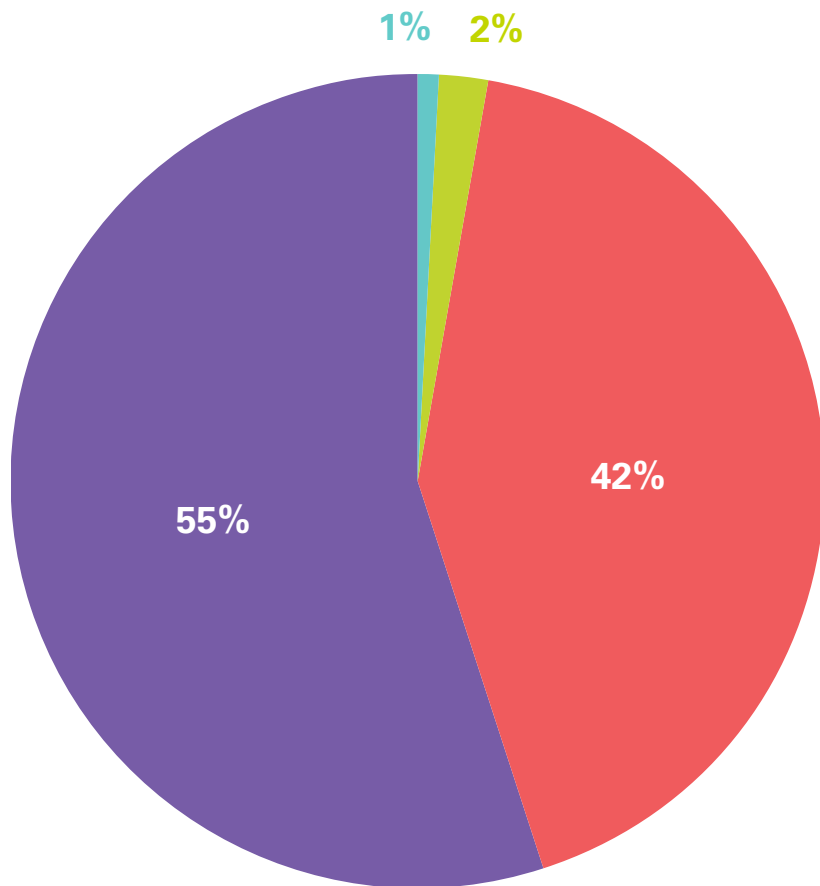


Of those who identified as belonging to the South Asian community, the largest share of respondents is aged 25 to 34 years (Figure 7). However, South Asian participants are not evenly spread across all age groups. Over one third of respondents are between the ages of 25 and 34 (35%), nearly a quarter 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

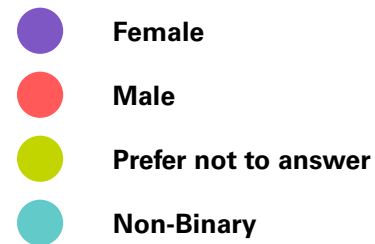
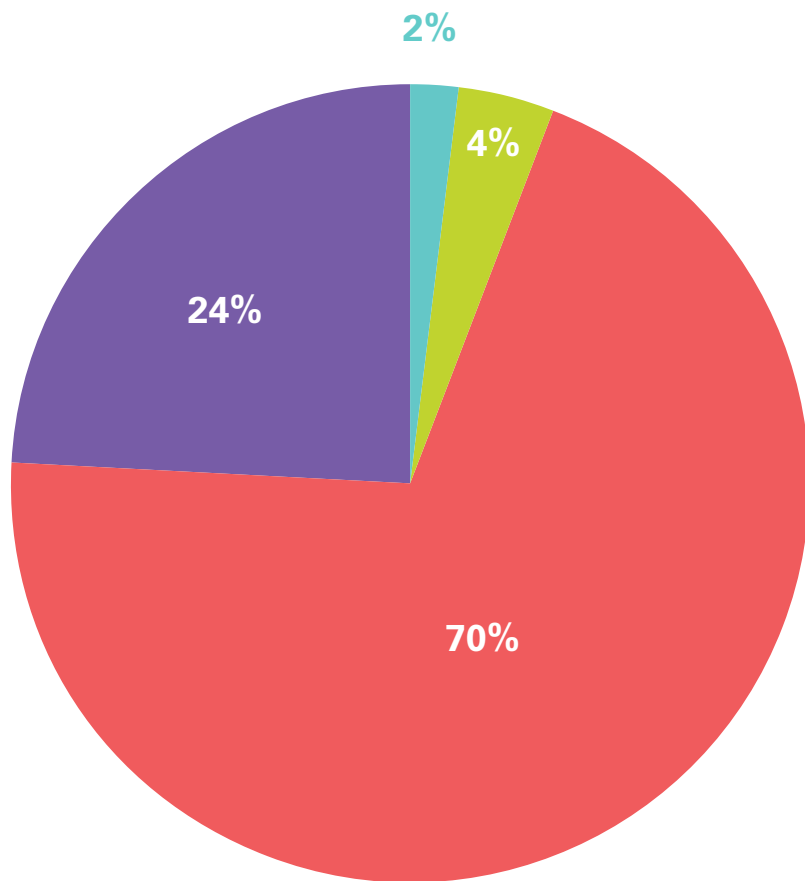


FIGURE 9

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

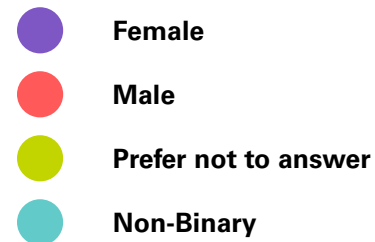
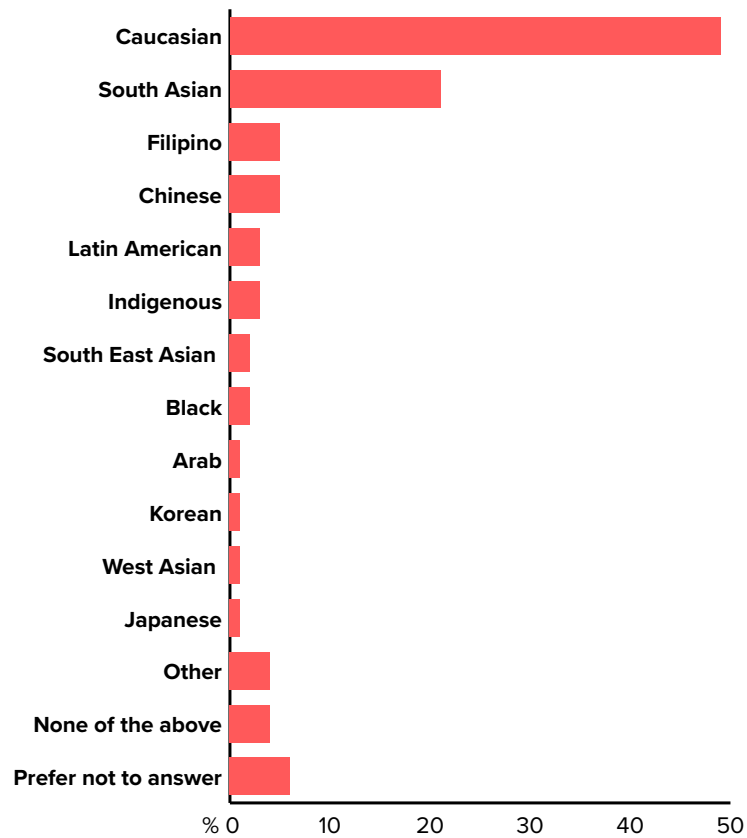


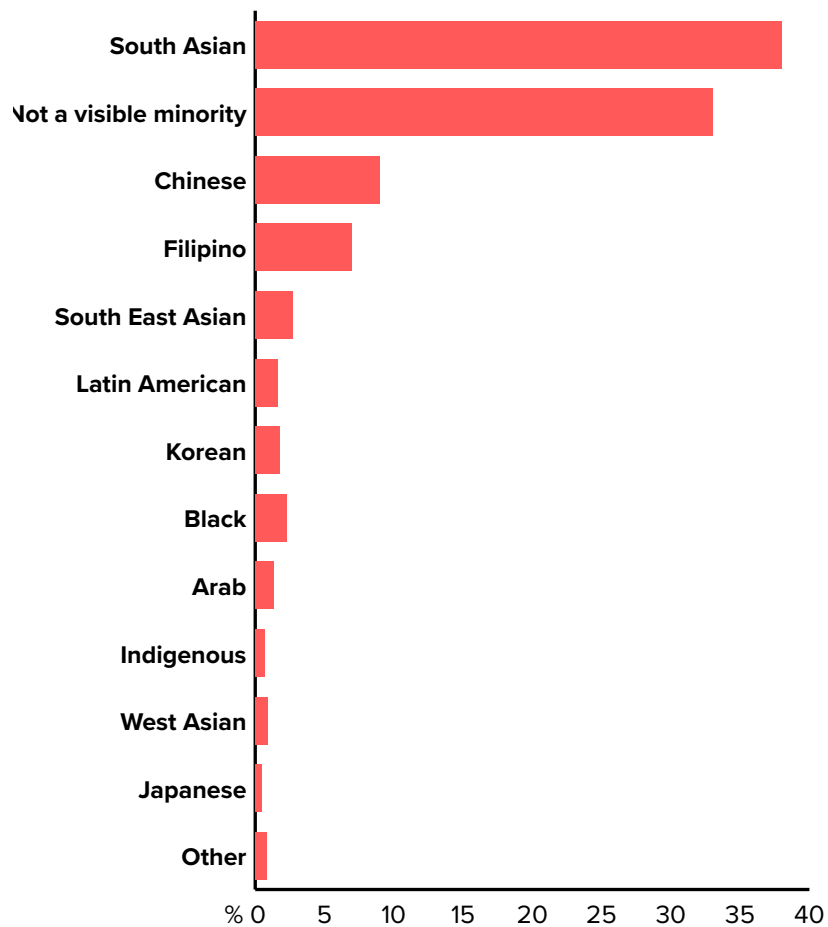
FIGURE 10
Self-Identified Groups (n=1679)



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

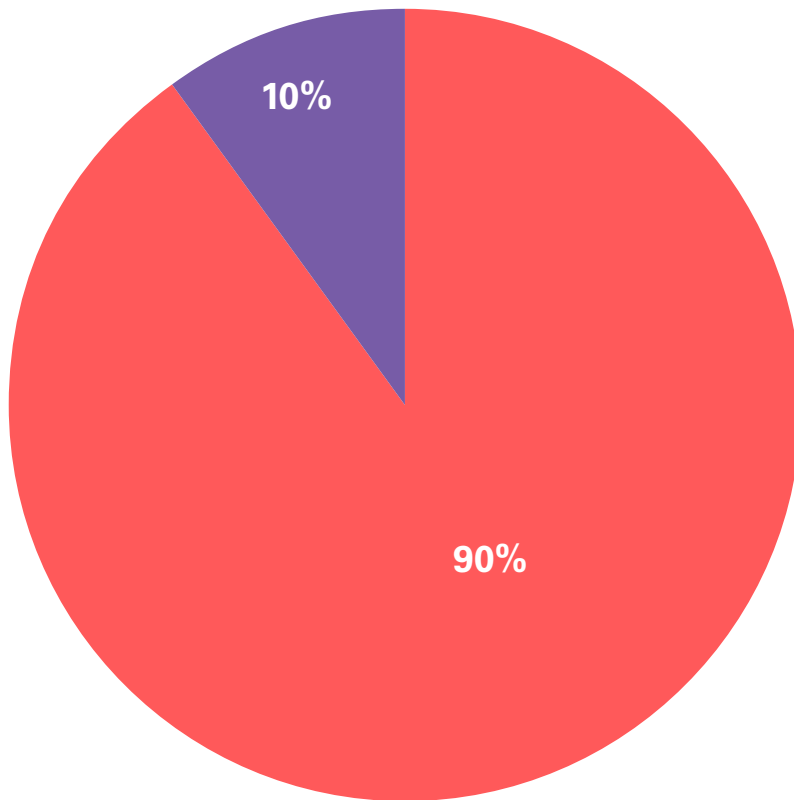


The results captured in the survey are comparable to the 2021 Stats Canada Census results (Figure 11). The Census results indicate that 33% of Surrey residents identify as “not a visible minority”, 38% South Asian, 9% Chinese, and 7% Filipino. The survey collected slightly more responses from Caucasian 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

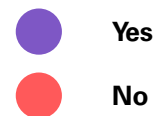
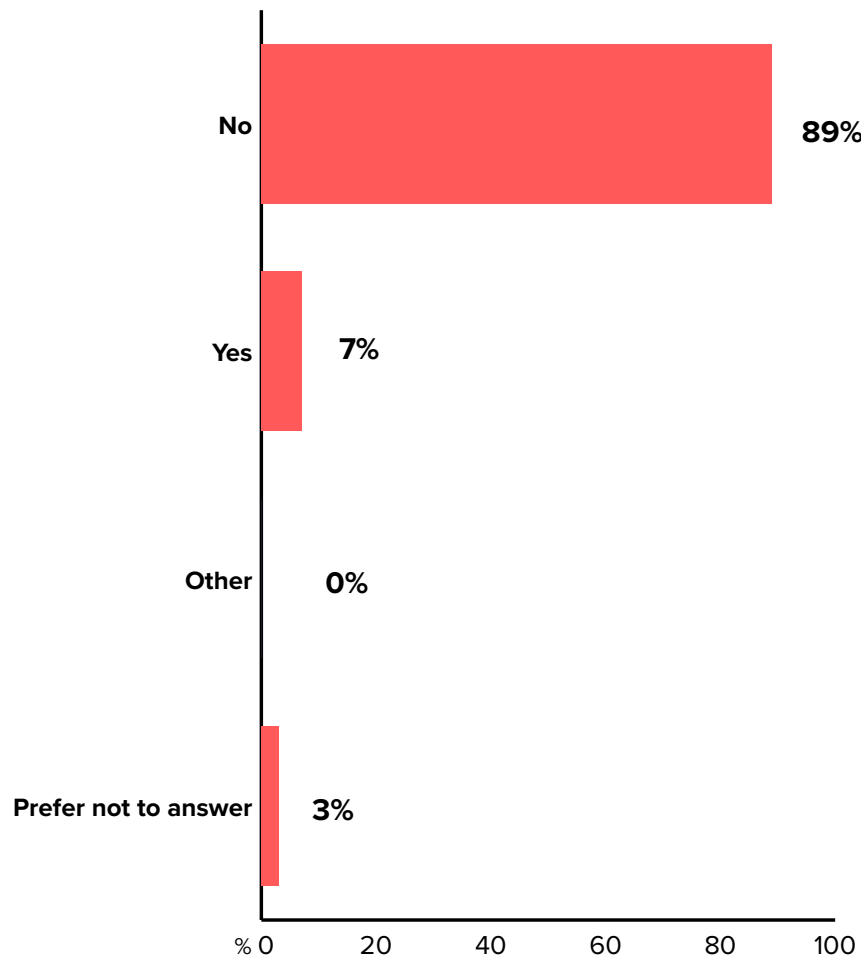


FIGURE 13

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



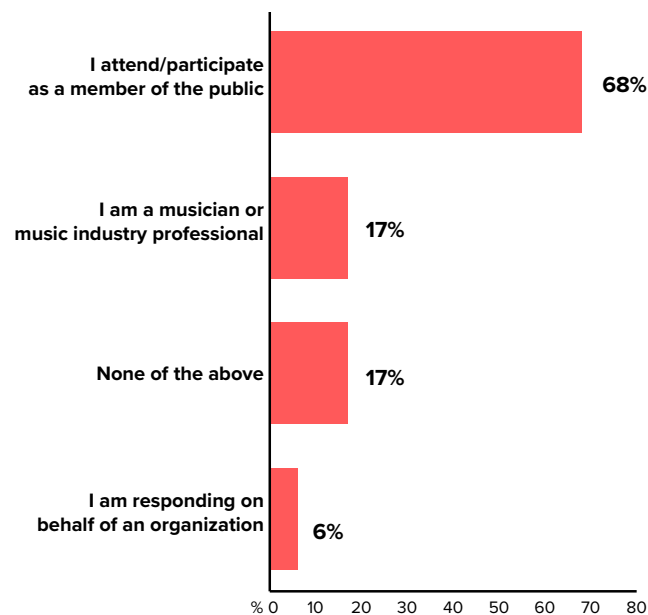
7% identify as a member of the 2SLGBTQIA+ community (Figure 13). These results indicate the need for music events in Surrey to remain welcoming and accessible for equity-deserving groups, including members of the 2SLGBTQIA+ community.

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)

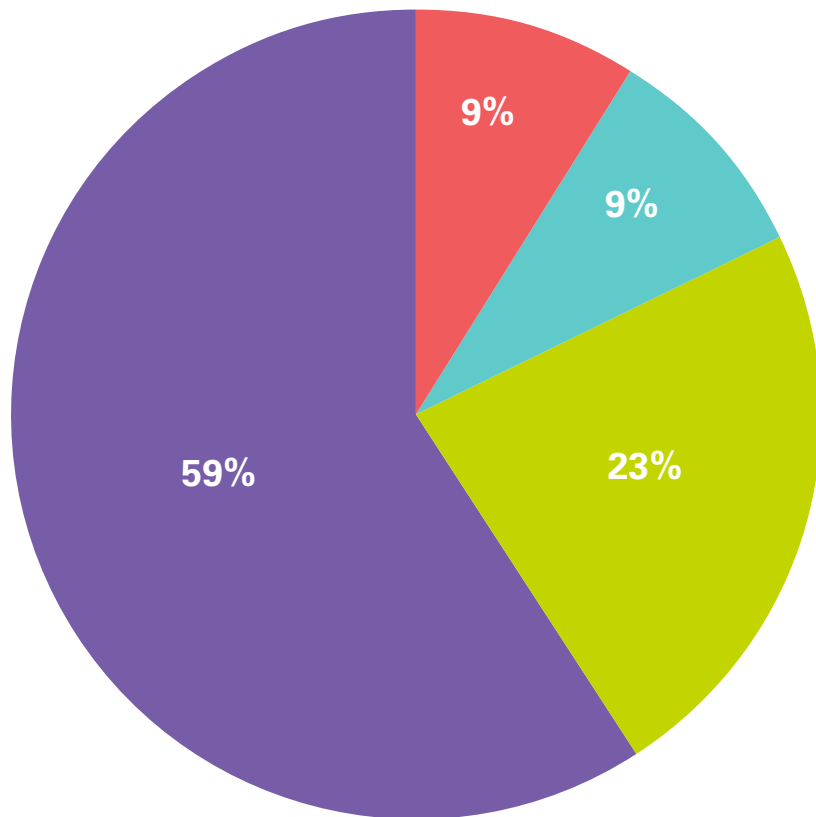


As portrayed in Figure 14, a large majority of survey participants attend or participate in music events in Surrey as members of the public (68%). This suggests that approximately 350,000 people living in Surrey engage with music. While other participants engage as musicians or music industry professionals (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 break down 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

¹³The 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.

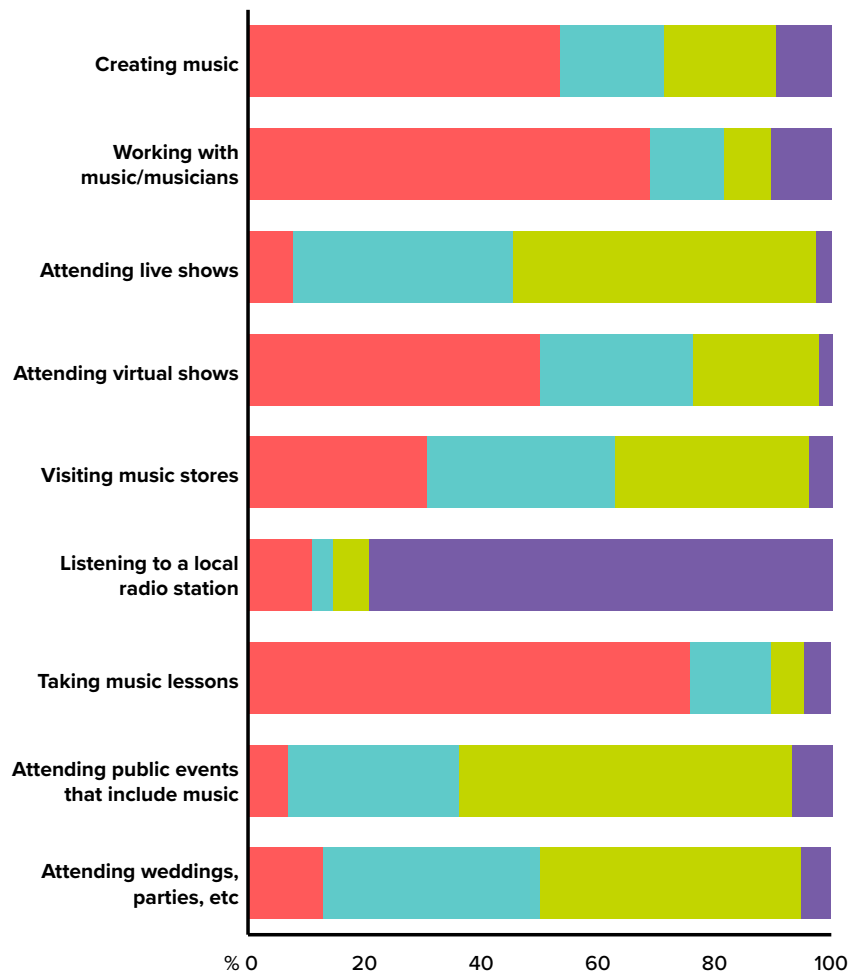
-  I am a musician
-  I work as a freelancer/contractor in the music industry
-  I am employed by an organization/company in the music industry
-  Other

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 2019¹⁴ 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.

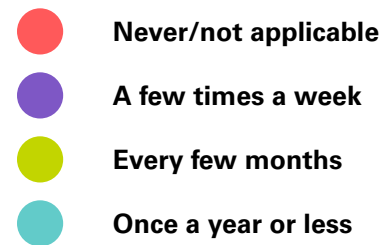
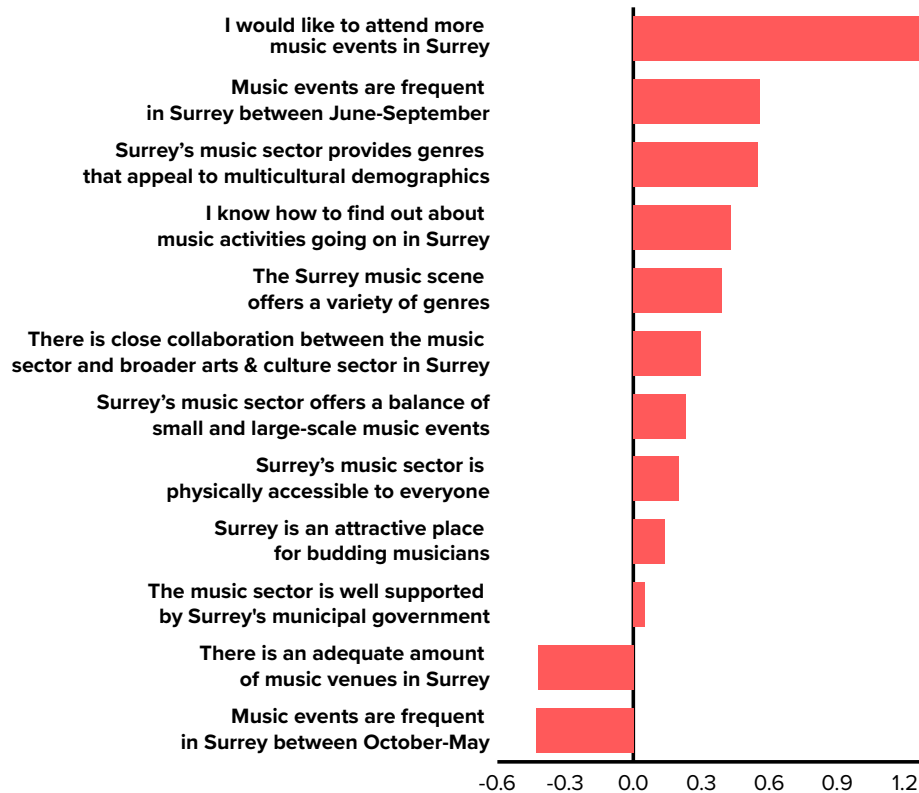


FIGURE 17

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



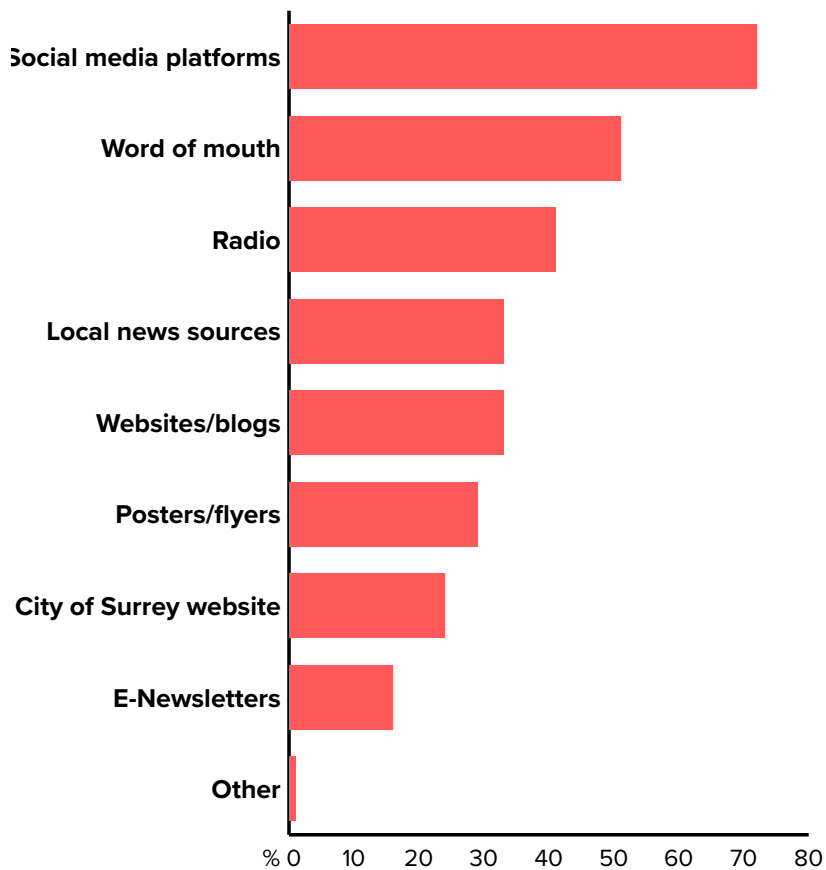
Survey participants were asked to indicate their level of agreement with a number of statements related to the music scene in Surrey (Figure 17). The majority of participants agree they would like to attend more events, indicating a popular interest in music in the city. Participants further agreed that 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)



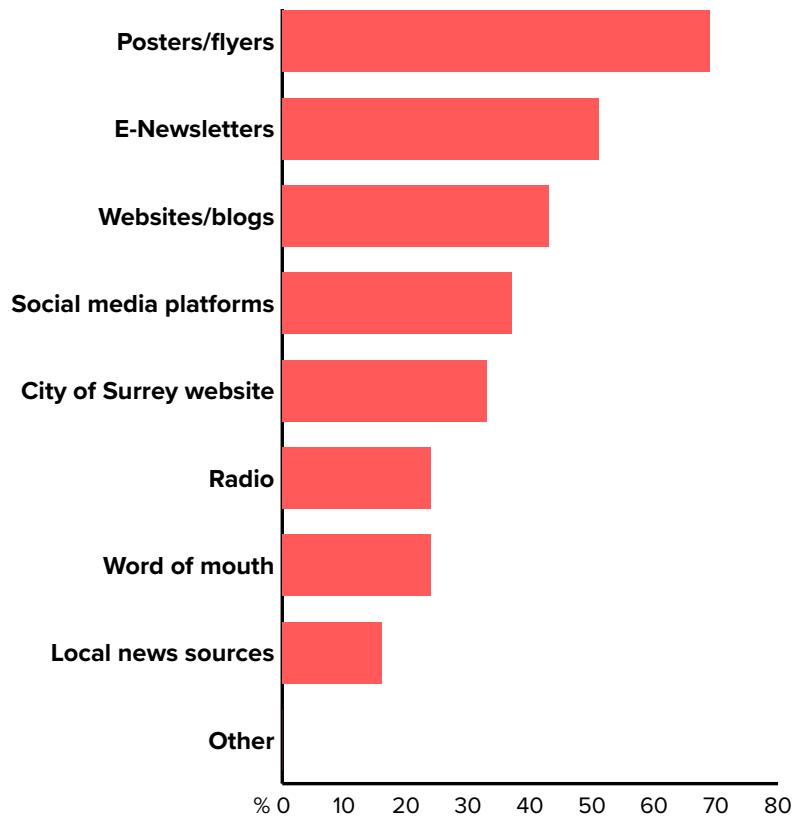
Participants indicated how they typically learn about music events in Surrey.

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? Musician Responses (n=181)

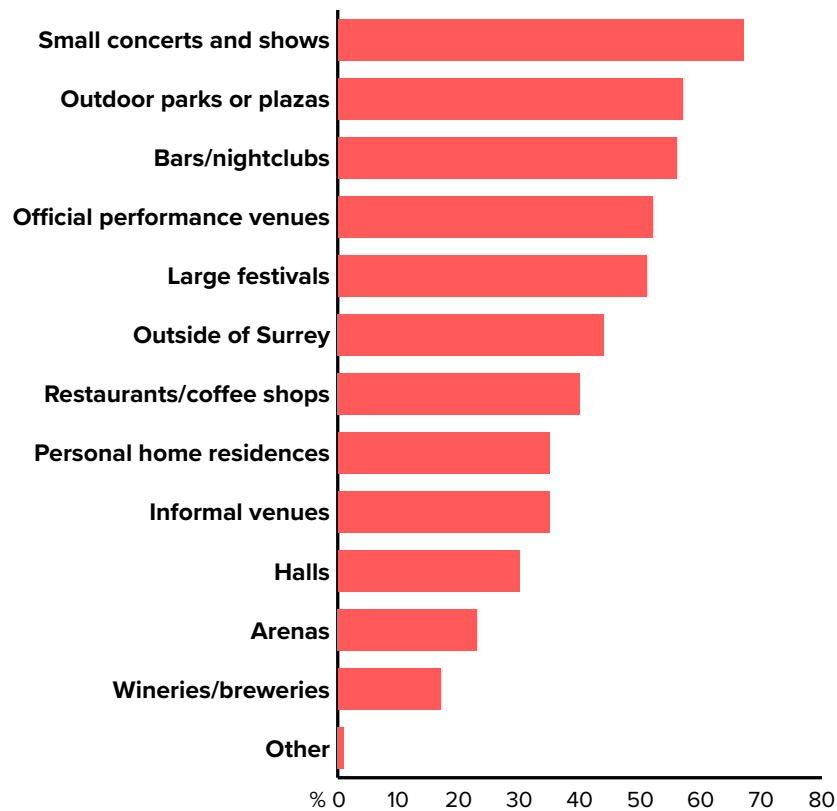
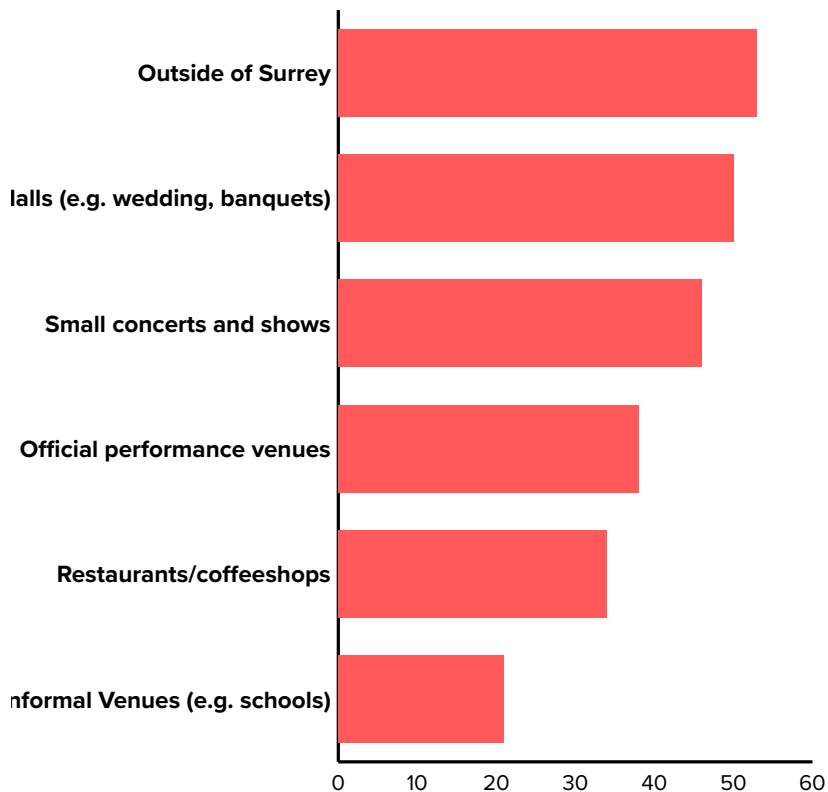


Figure 21 portrays where musicians typically attended music events in Surrey. Over two-thirds of musicians attend small concerts and shows (67%). Most musicians also attend events in outdoor parks and plazas (57%), bars/night clubs (56%), official performance venues (52%), and larger festivals (51%).

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)

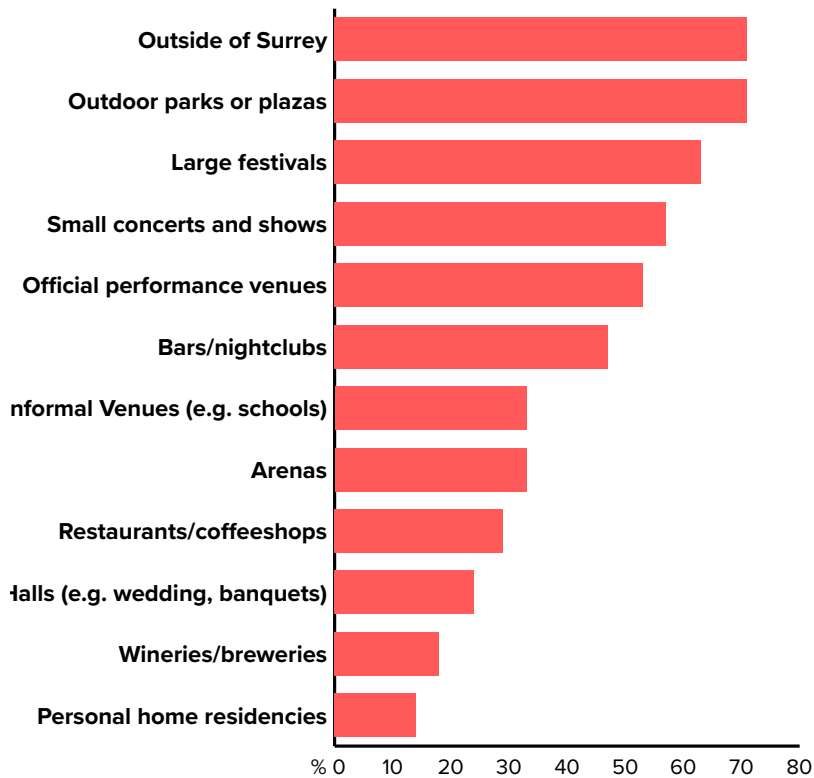


Figure 23 portrays a similar story related to Indigenous engagement – i.e. many Indigenous participants attend music events outside of Surrey (71%). Many Indigenous participants also attend events occurring in outdoor parks and plazas (71%), as well as at large festivals (63%).

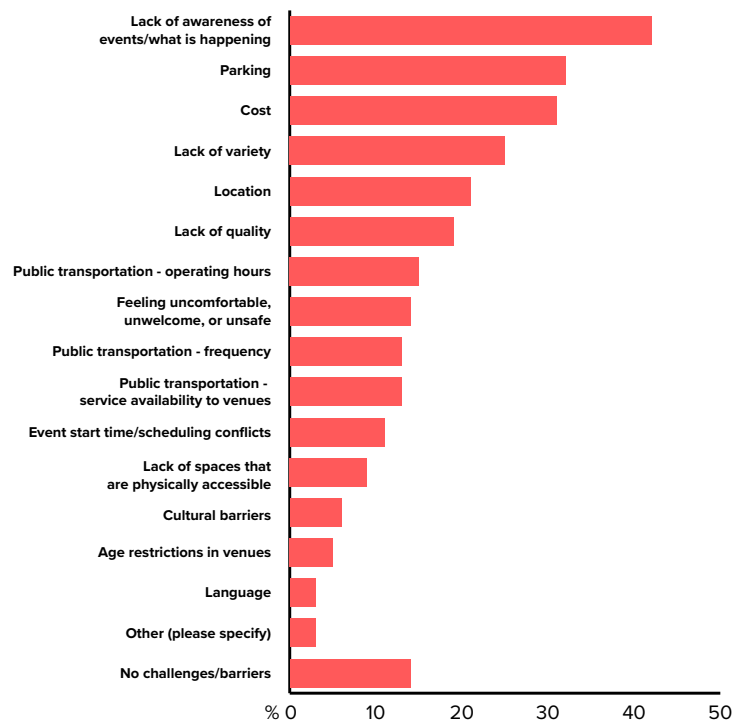
Source: Surrey Music Strategy Survey

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.

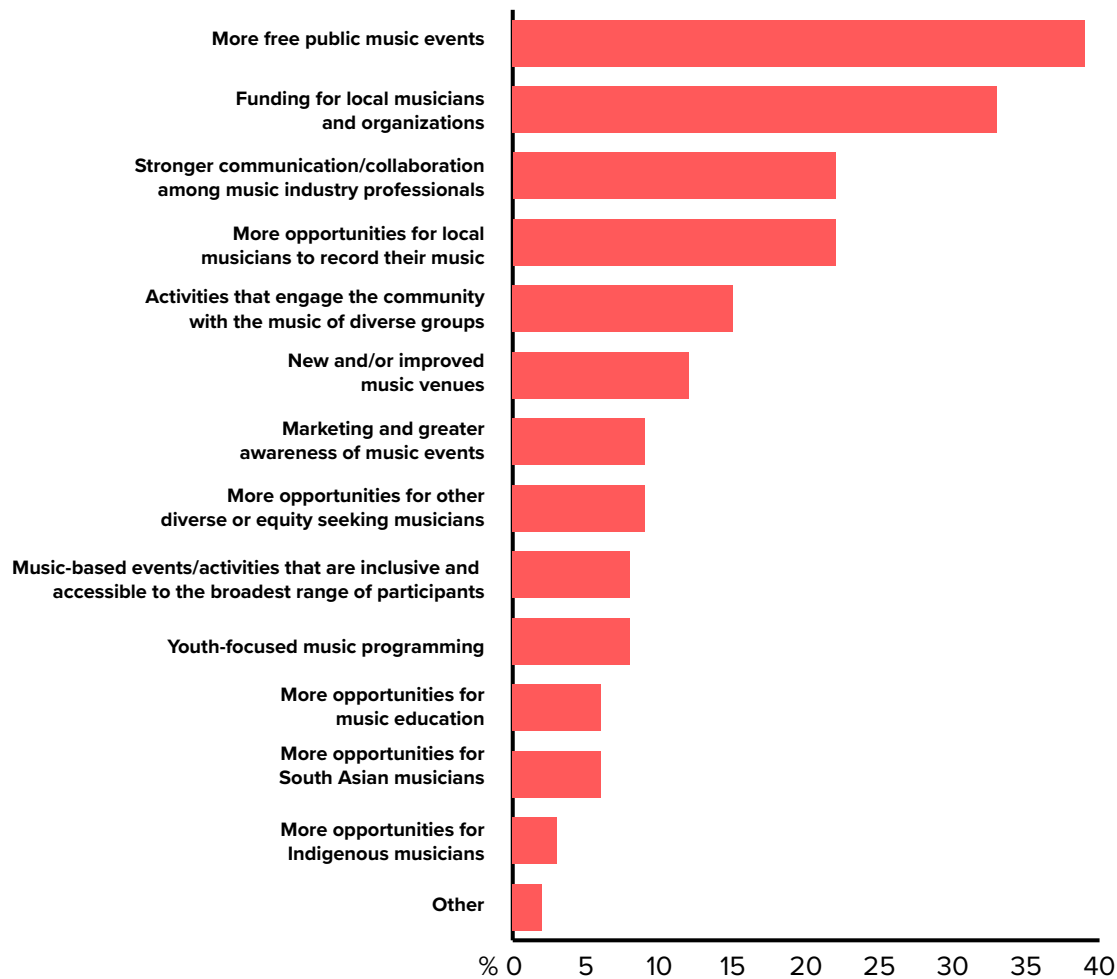
Other participants observe limited parking (32%) and high costs (31%) as the predominant barriers to accessing music in Surrey. Other challenges expressed by participants include the lack of clean and accessible restrooms during public events, COVID-19 related requirements (e.g. vaccine passports), and 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)

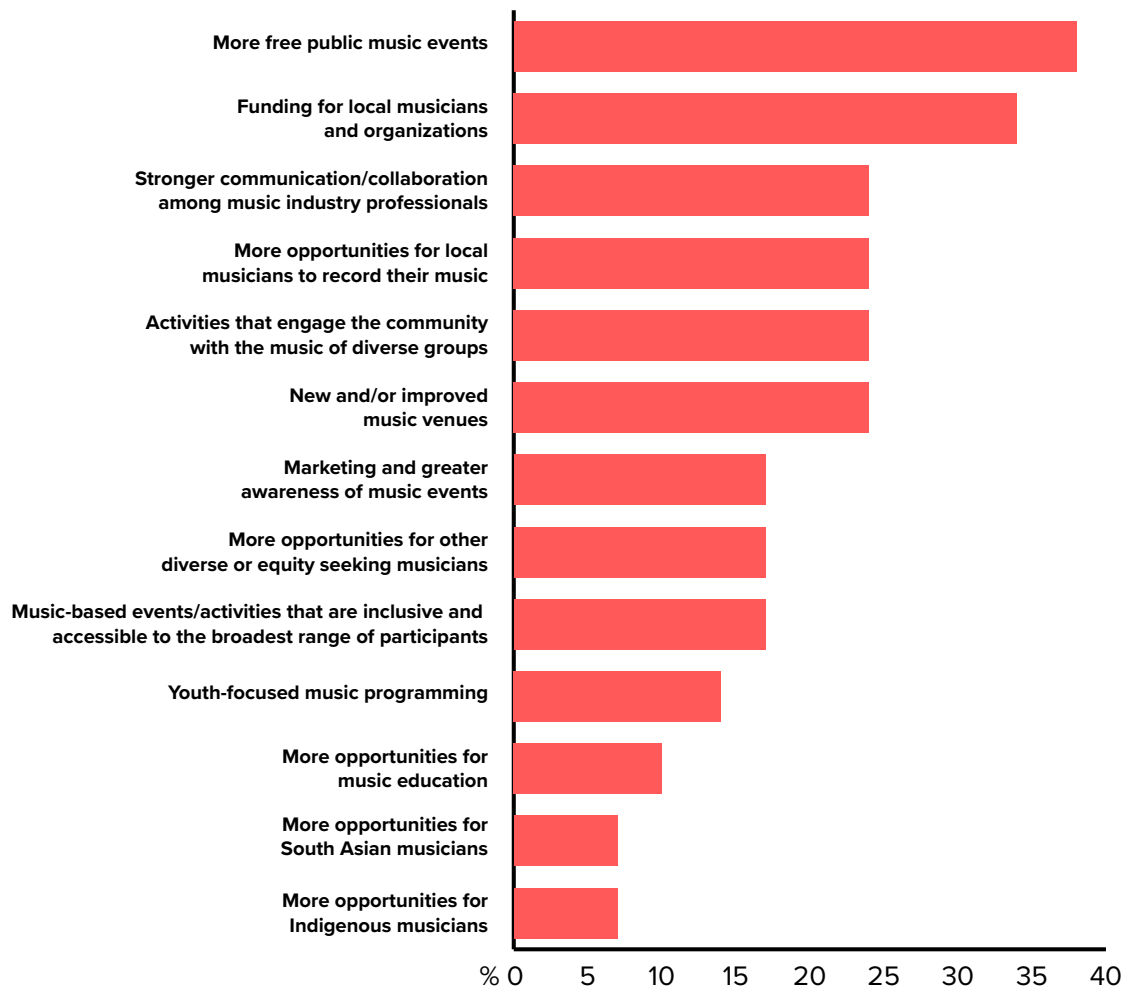


Participants were asked what the priorities should be in terms of developing the music scene/sector in Surrey (Figure 25). The top priorities for participants are the need for more free public events in the community (39%) and new and/or improved music venues (33%). The results reveal that other priorities 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)

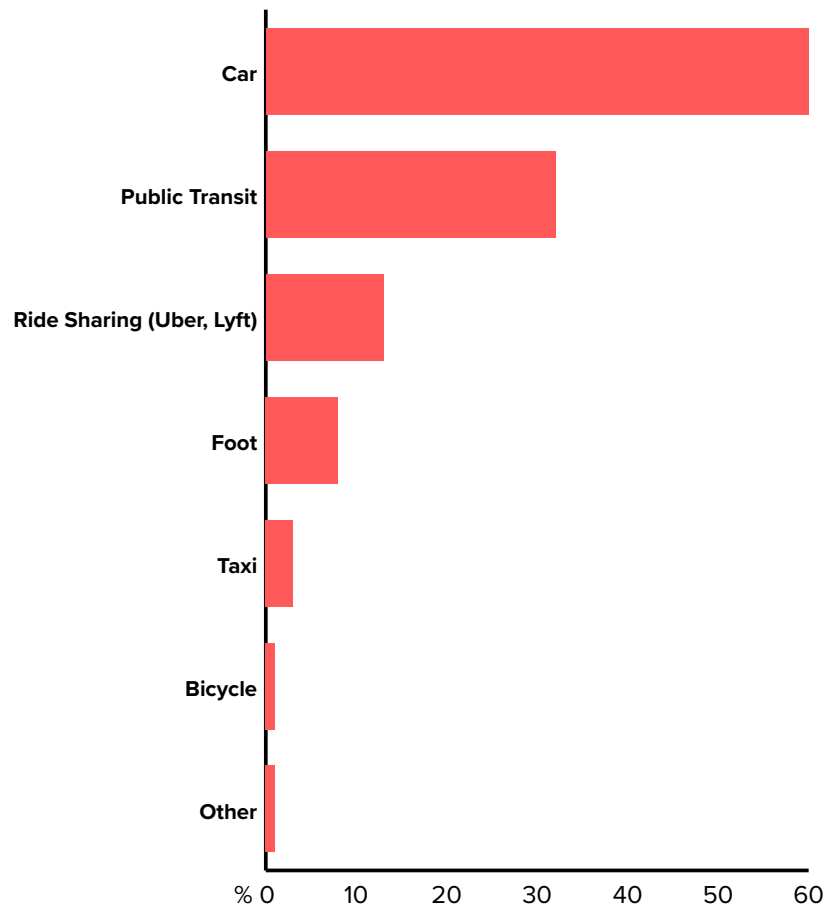
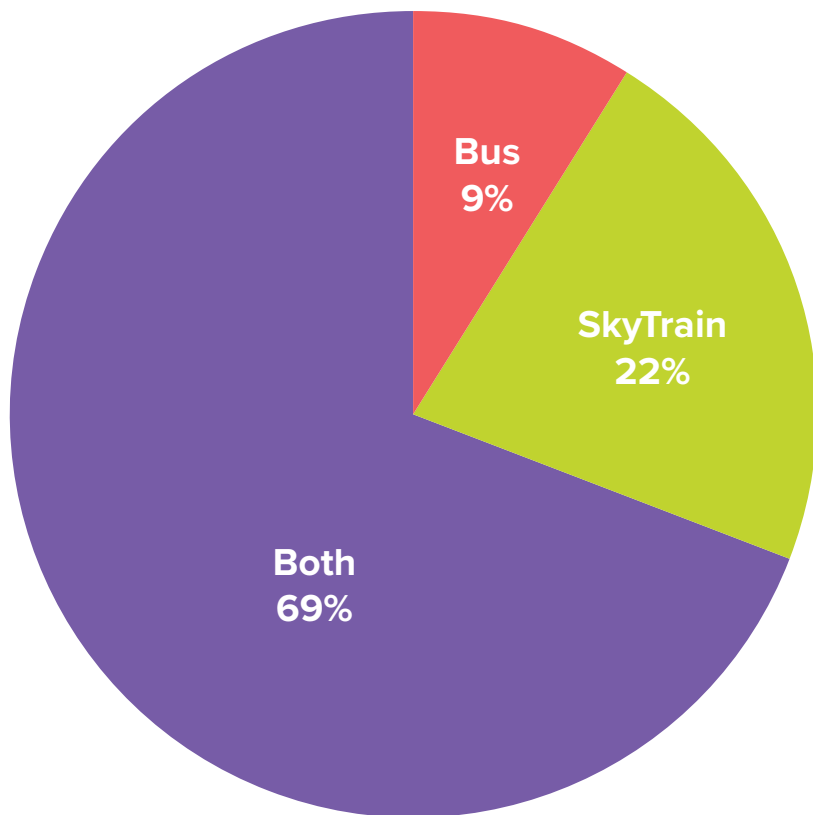


Figure 27 portrays the means of transportation typically used to access music entertainment outside of participants' homes. The most-used method of transport is to travel by car (60%). Many participants use public transit (32%) and ride sharing services such as Uber and Lyft (13%). Overall, responses 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).

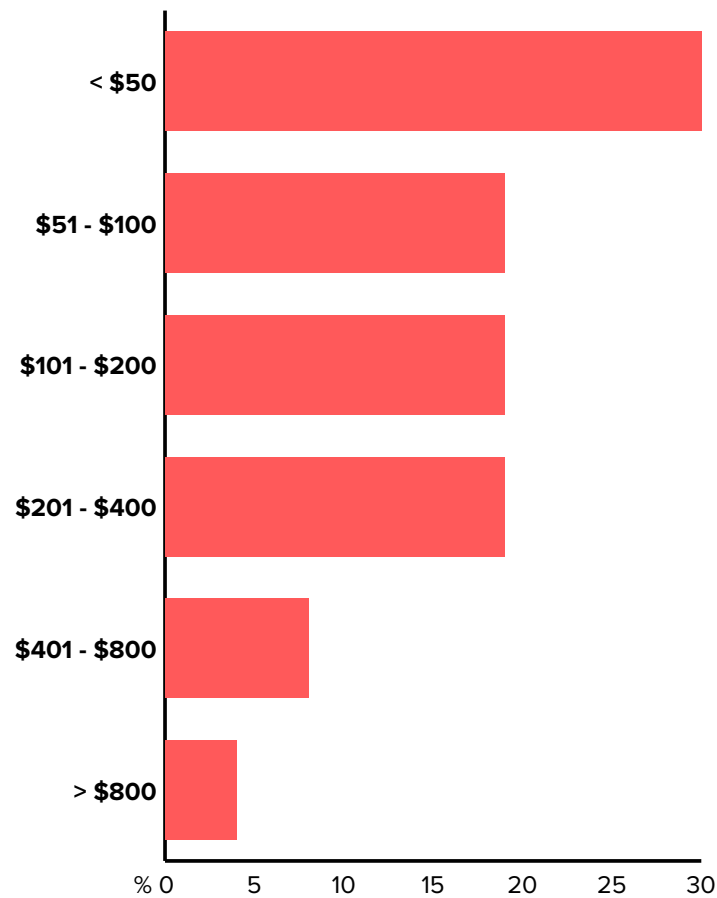
Source: Surrey Music Strategy Survey

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)



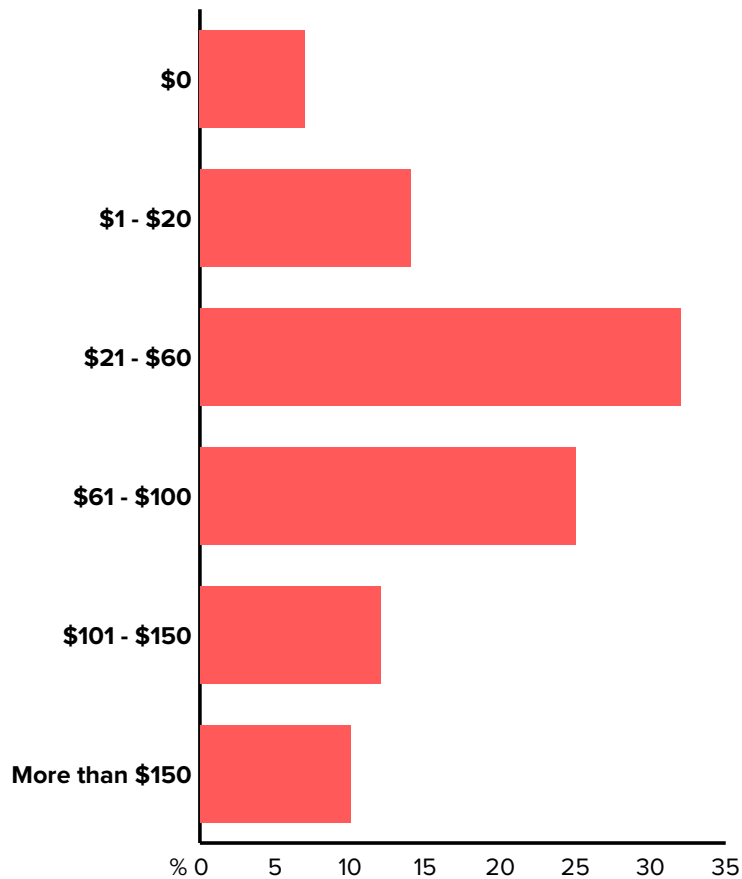
Survey results indicate that on average, participants attended six music events in Surrey in 2019.¹⁶ Participants were asked how much they spent participating in such music activities (Figure 29). Most participants (49%) spend up to \$100 per music event. Many participants were also willing to spend 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.

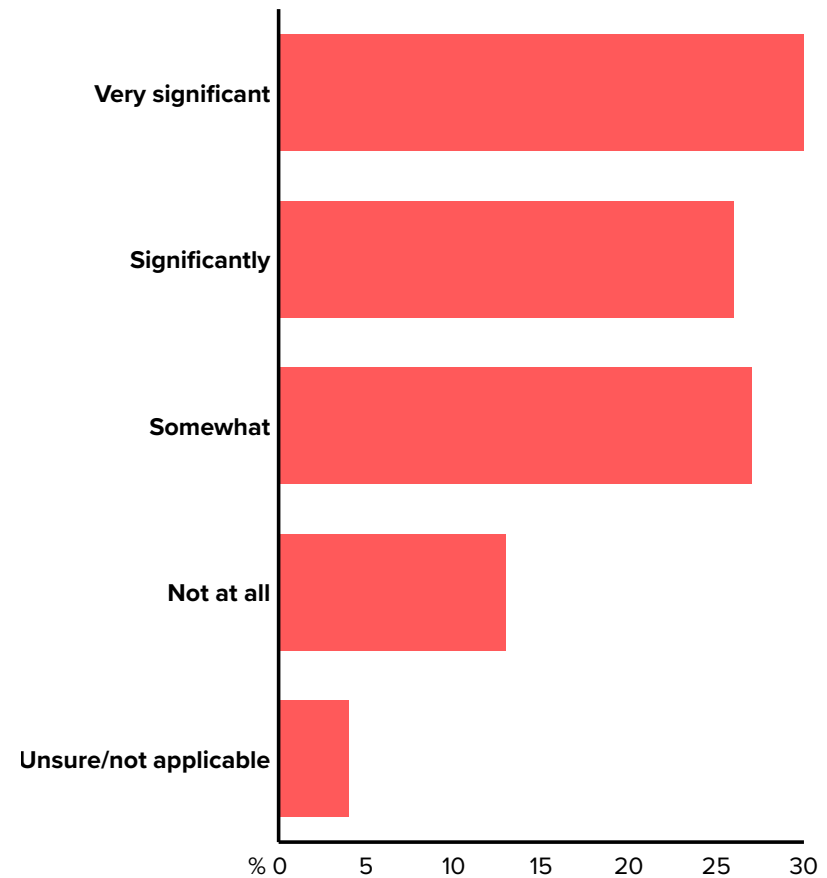
Source: Surrey Music Strategy Survey

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

Name	Title	Organization
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

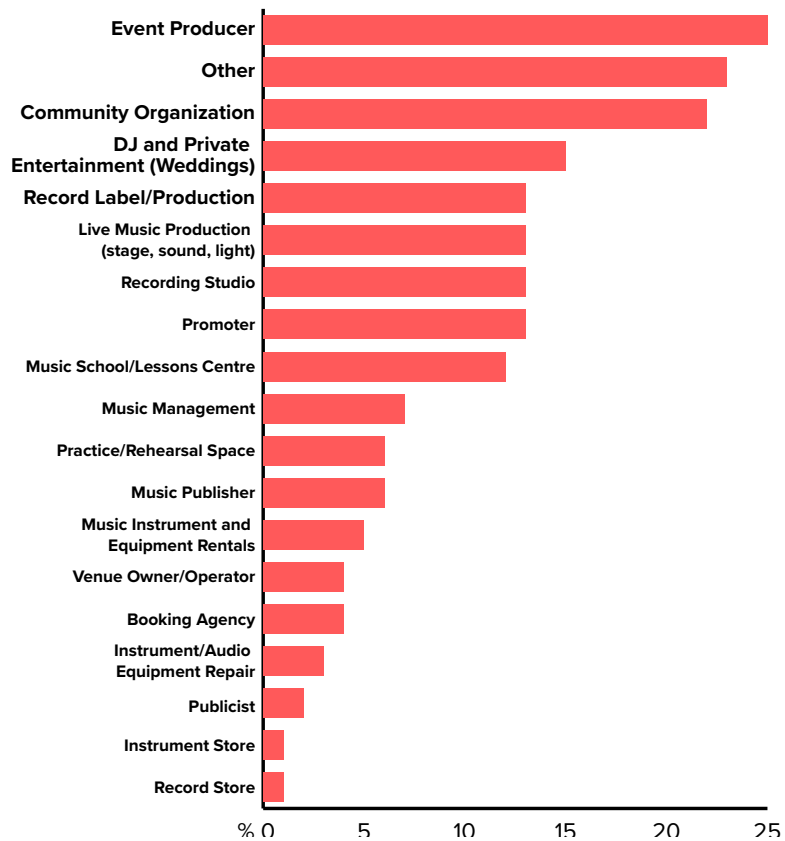
Using the North American Industry Classification System (NAICS) listed in Appendix D.1, Nordicity identified approximately **180 music businesses**, see Appendix D.2 (excluding live music venues and festivals in Appendix D.3). Comparatively, The City of Victoria identified a total of 134 music businesses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

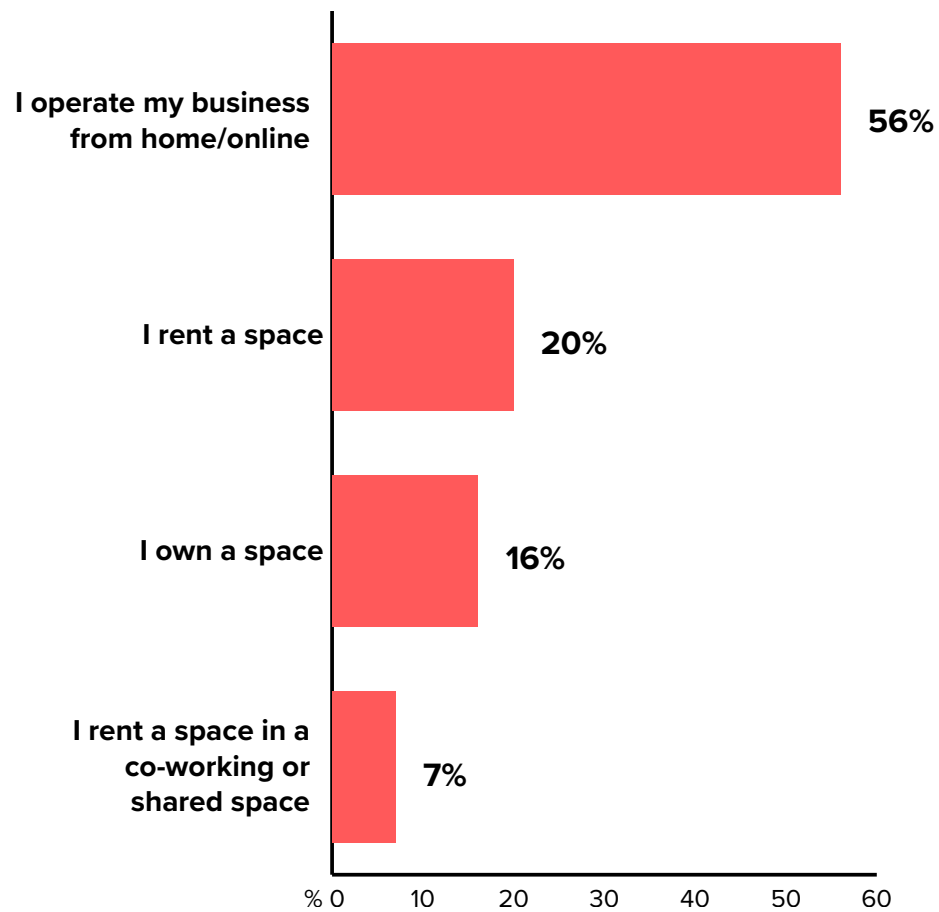


As seen in Figure 32, the largest share of respondents were event producers (25%) and community organizations (22%). Several respondents also indicated other (23%), which includes instrument design, manufacturing, and composing.

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

FIGURE 33

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

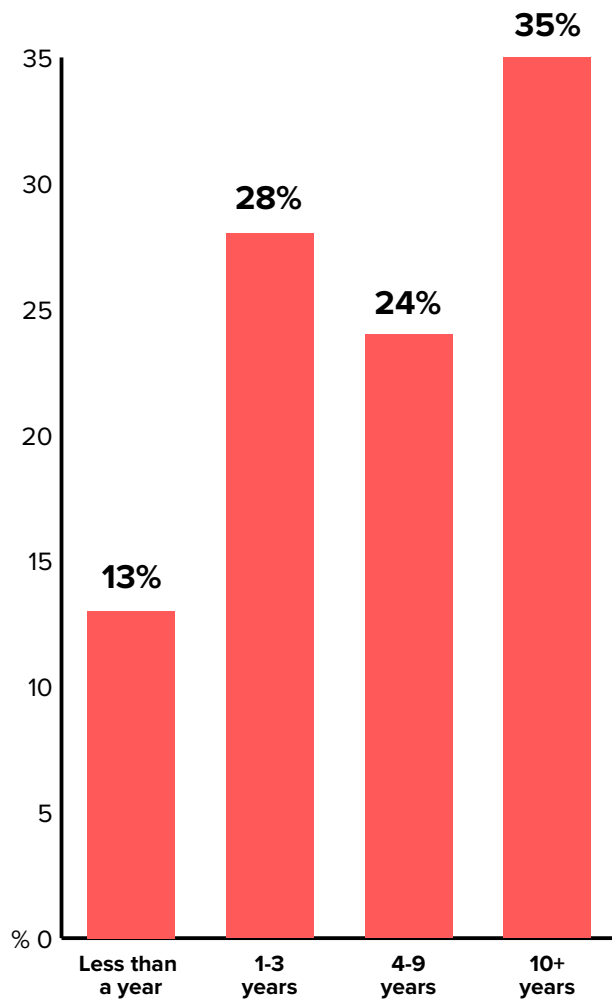


Notably, the majority of businesses reported operating from home or online (56%), while a smaller share rent (20%) or own a space (16%) (Figure 33). This finding could be indicative of a lack of available and affordable space in Surrey, as explored in other sections.

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)

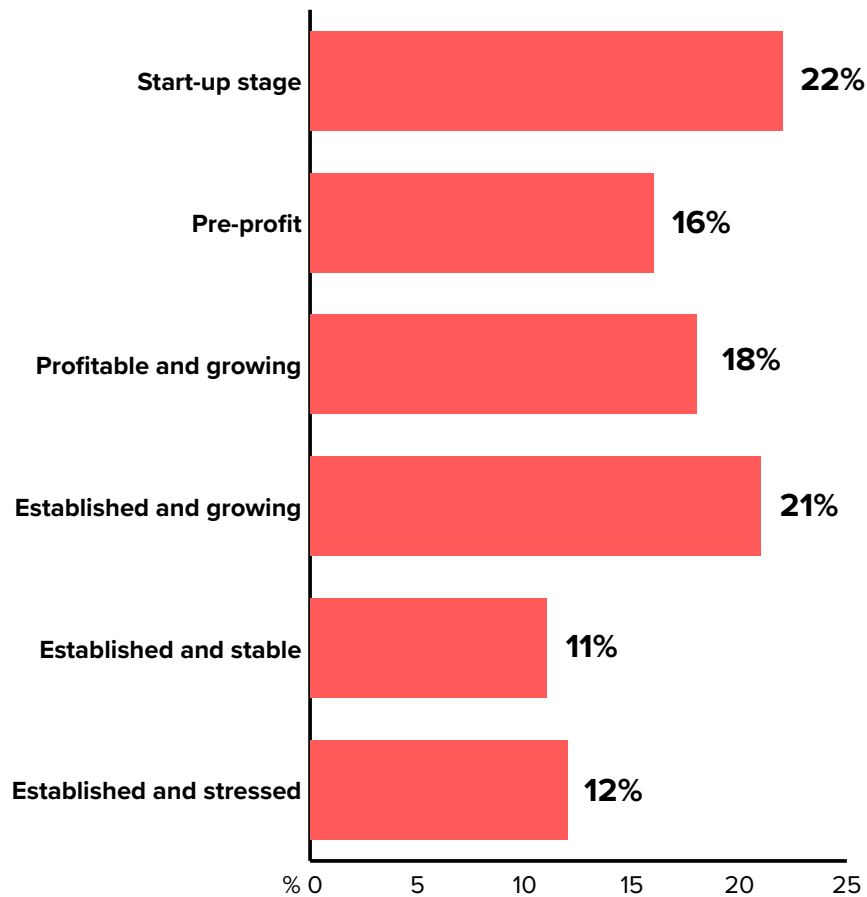


Figure 35 illustrates the various stages of music businesses in Surrey. While 22% of music businesses are in the start-up stage, a similar percentage (21%) are established and growing. Overall, music businesses in Surrey span widely across the different stages.

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 population¹⁹ but a lower representation of other populations.

Source: Surrey Music Strategy Survey

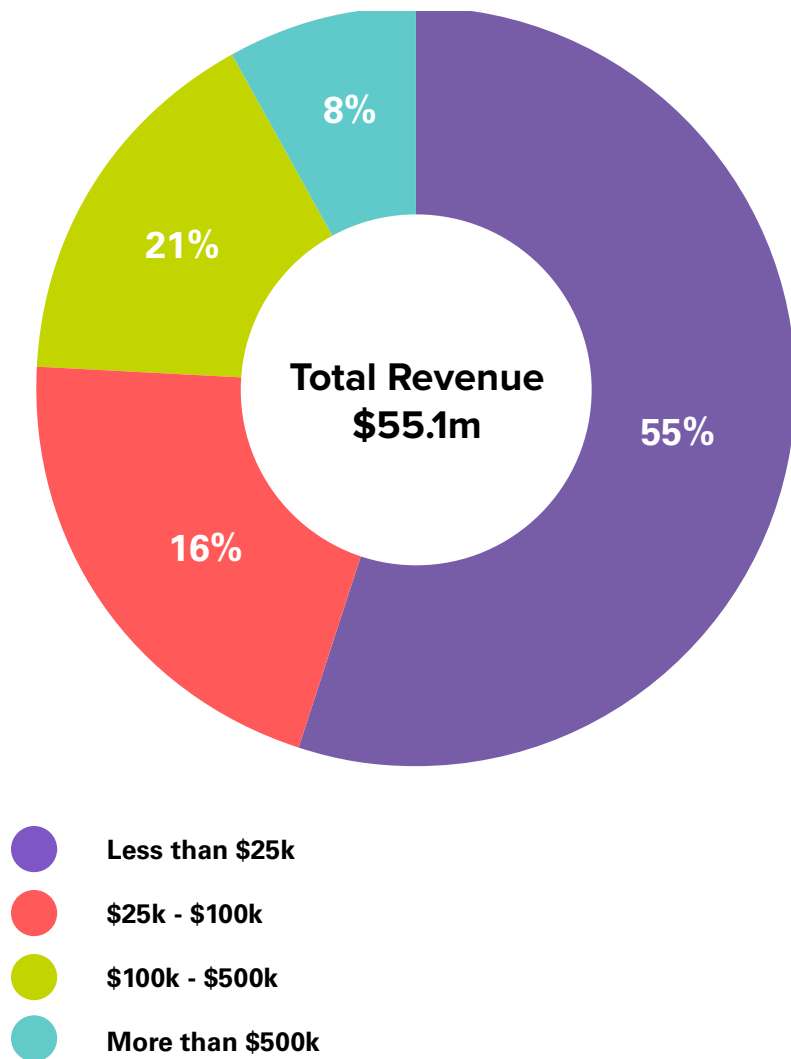
¹⁹ <https://www150.statcan.gc.ca/n1/daily-quotidien/210615/dq210615a-eng.htm>,

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.

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

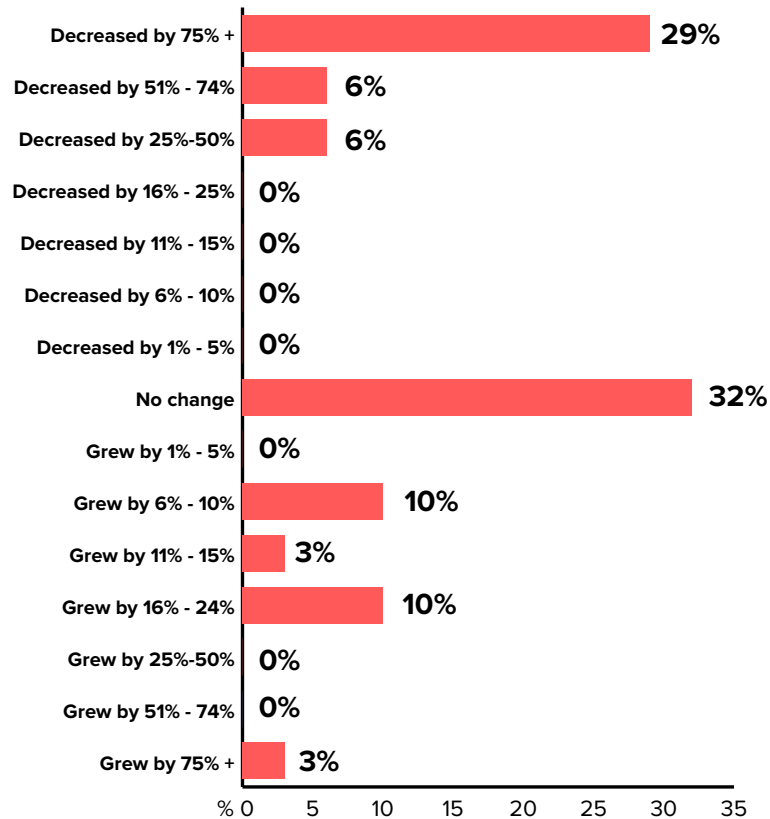
Music Business Impact	Direct	Indirect (Spin-Off)	Induced (Spin-Off)	Total
GDP	\$19,483,000	\$11,943,000	\$8,570,000	\$39,996,000
Income	\$14,528,000	\$4,939,000	\$2,837,000	\$22,305,000
Employment	450	190	90	730

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)



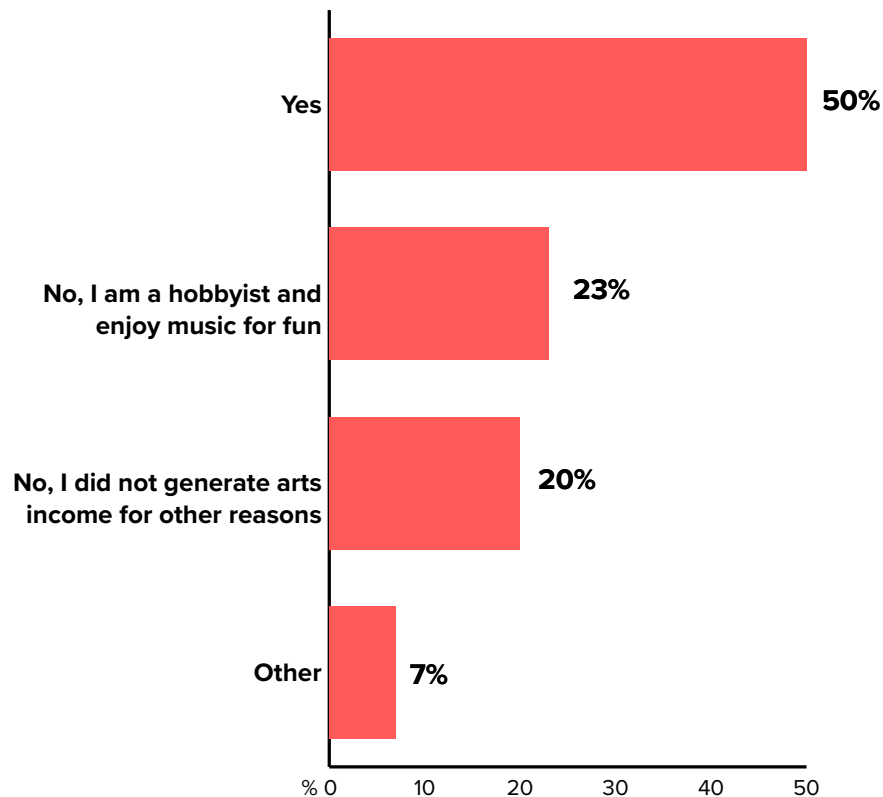
In comparing music businesses' 2021 gross revenue or sales to 2019 (Figure 37), 32% report no change in revenue and/or sales. However, 29% of participants report a decrease of 75%. Comparatively, only 3% of respondents report an increase of 75%. Notably, a significant majority of respondents indicated 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%).

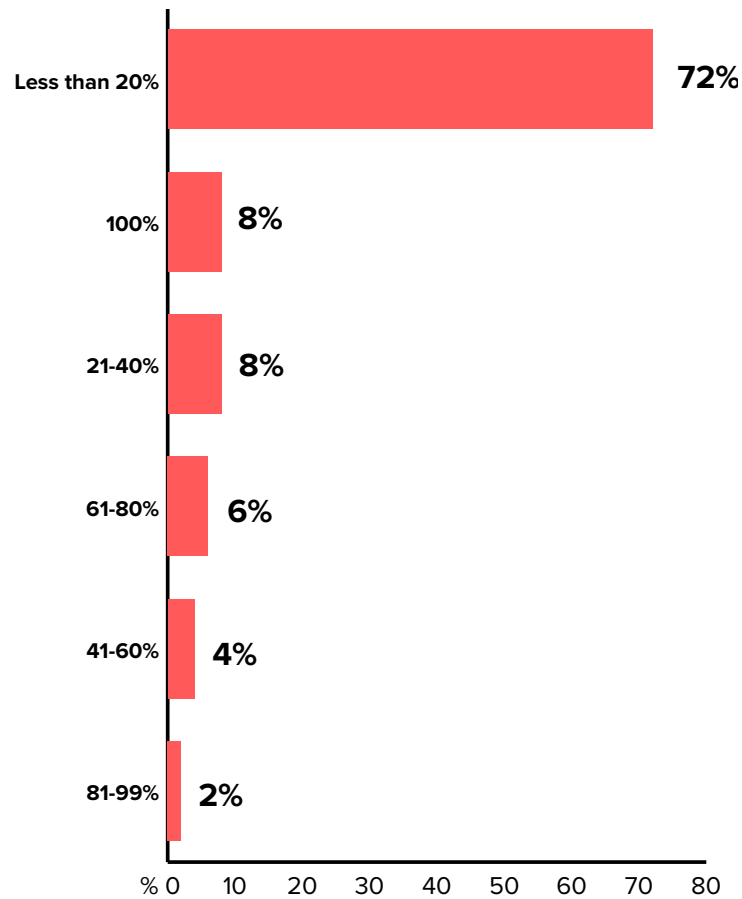
Comparatively, the City of Victoria Music Strategy and music research identified approximately 396 professional paid musicians.²²

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)

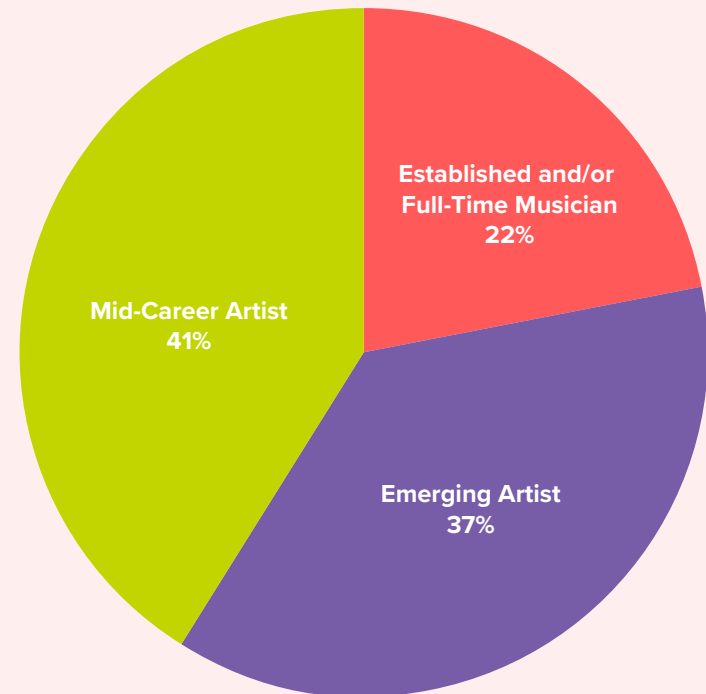


FIGURE 41

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

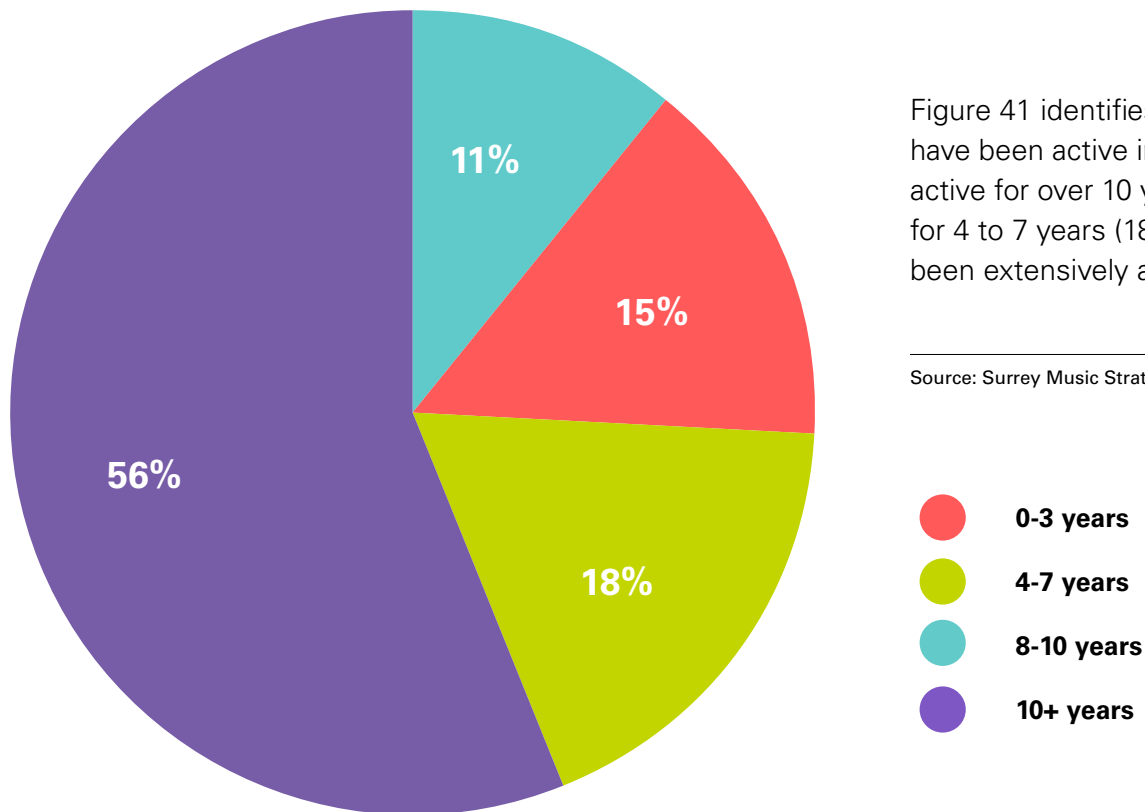


Figure 41 identifies the number of years musicians in Surrey have been active in their careers. Most musicians have been active for over 10 years (56%), while others have been active for 4 to 7 years (18%). Overall, Surrey-based musicians have been extensively active in their careers.

Source: Surrey Music Strategy Survey and Musician Database Intake Forms

Musician Impact

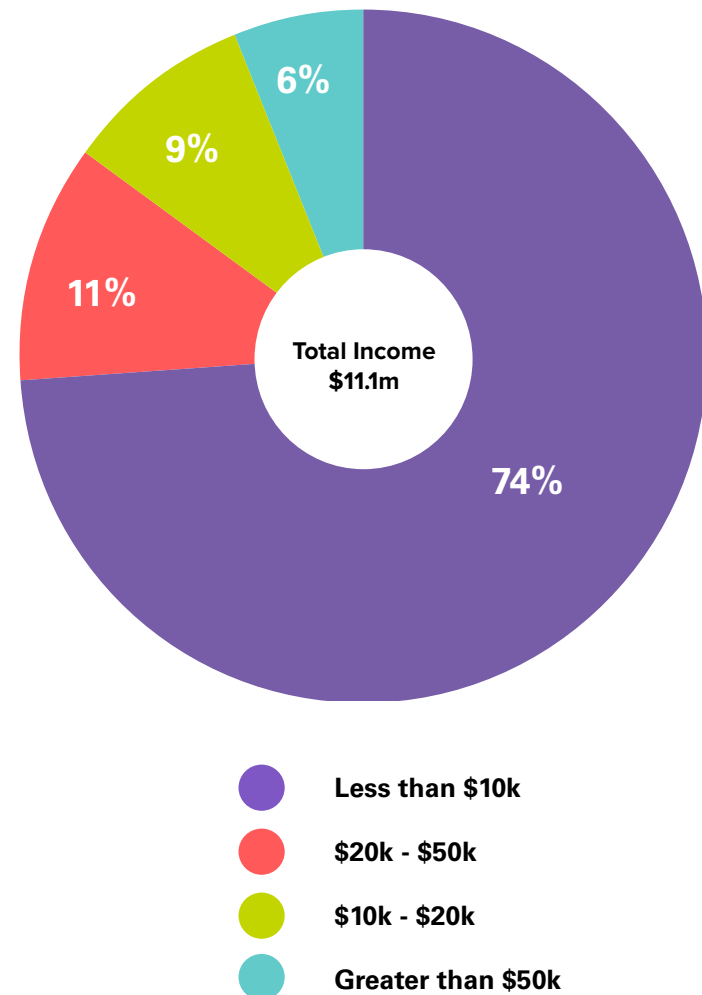
The survey identified an average annual **revenue of \$14,353**, totaling more than \$11M generated by the estimated total of 775 paid musicians described above. Comparatively, the average annual income for musicians in Vancouver is \$18,178.²³ It is also interesting to note that the average annual provincial 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**.

FIGURE 42
Breakdown of 2019 Musician Revenues
(n=86)



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.

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

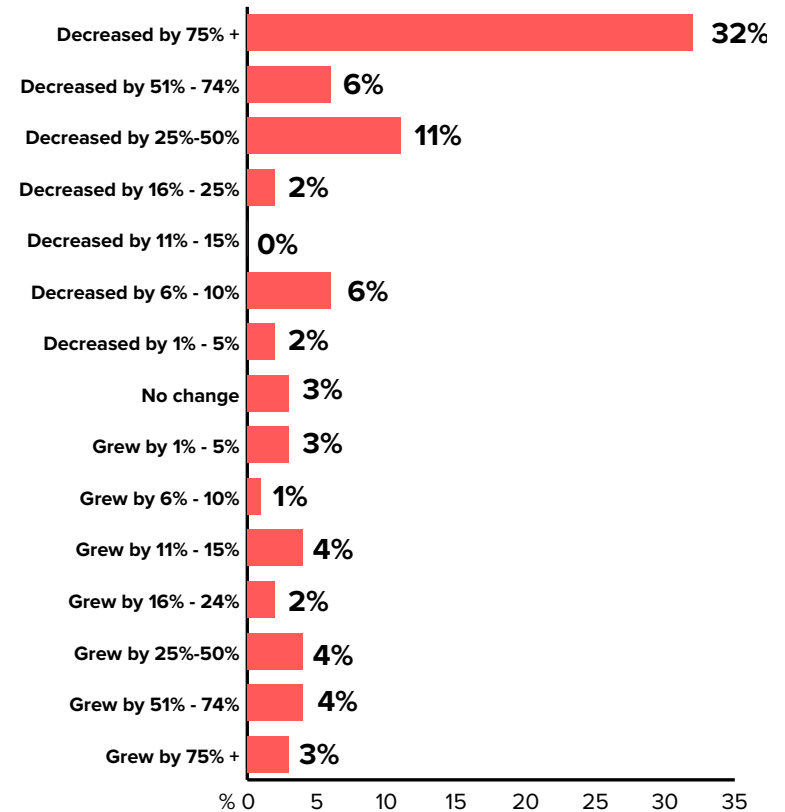
²⁶ Note, musicians were estimated to be a 0.5 FTE given the significant finding that the large majority have other income generating activities.

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

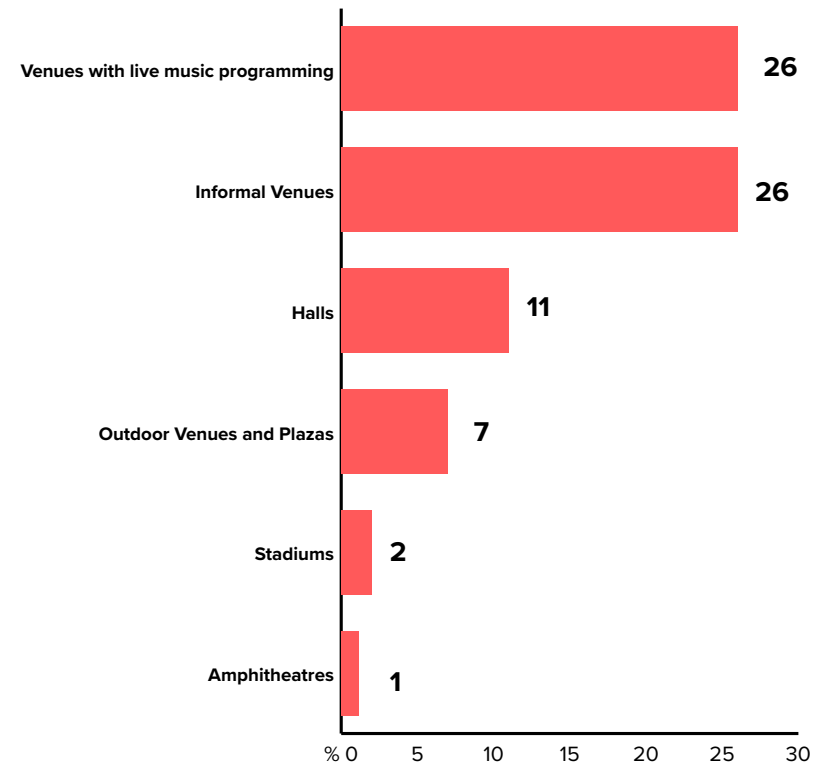
Source: Nordicity Research

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 Spend³⁰

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 Spend³¹

Provenance 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	✓

NAICS Code Pull	Category	Description	Creative BC Music Sector
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*

NAICS Code	Category	Description
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 exist, 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

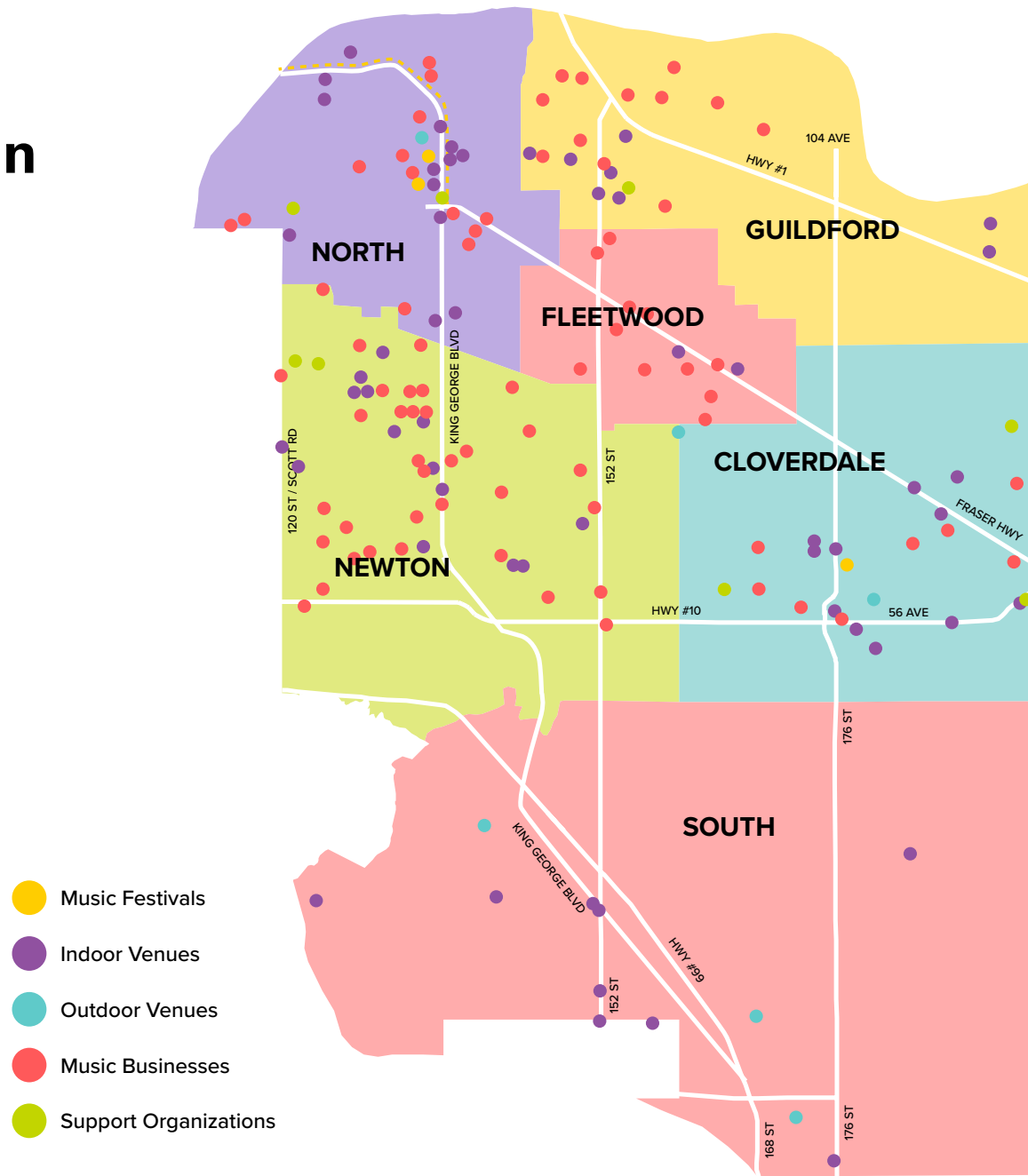


FIGURE 46

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

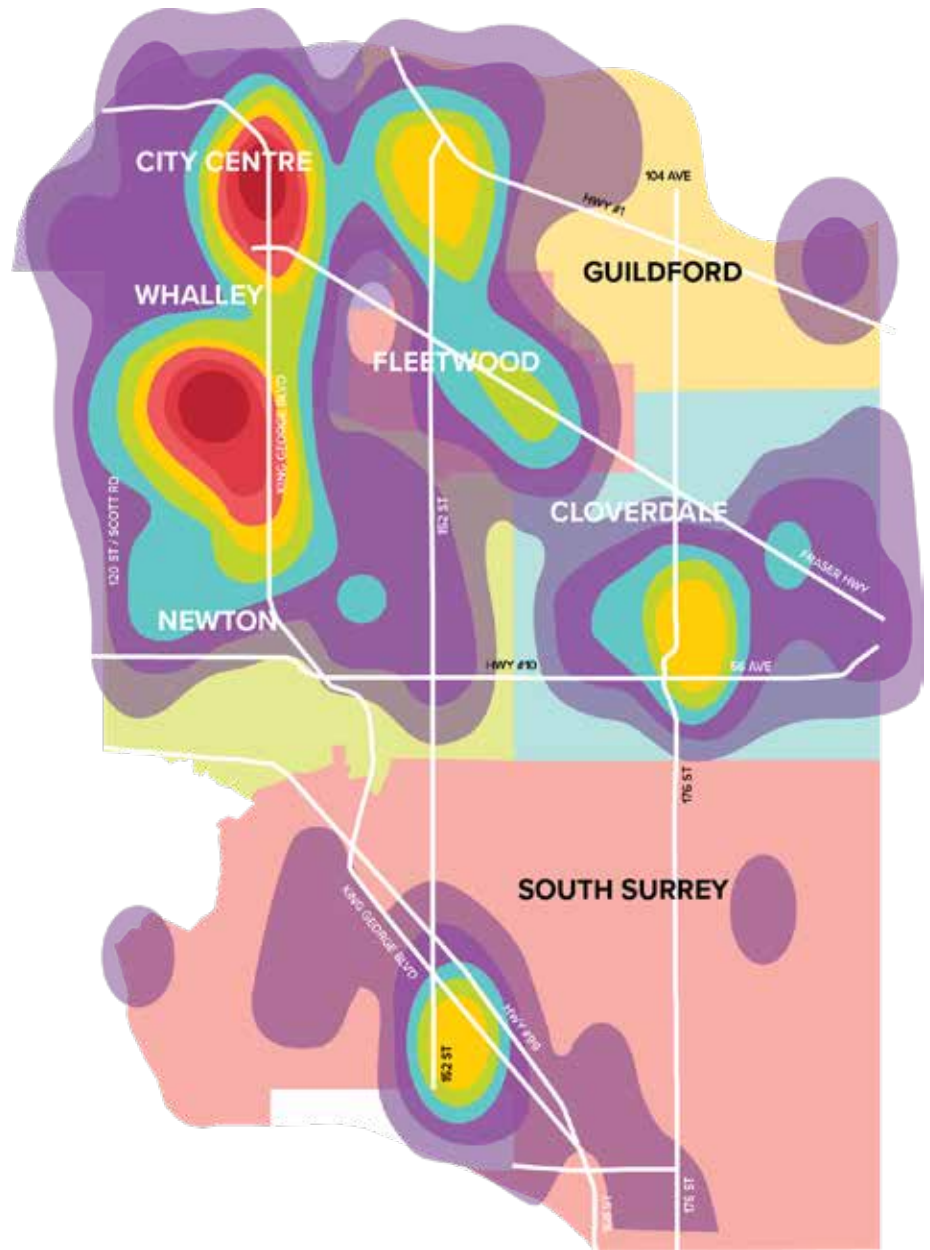
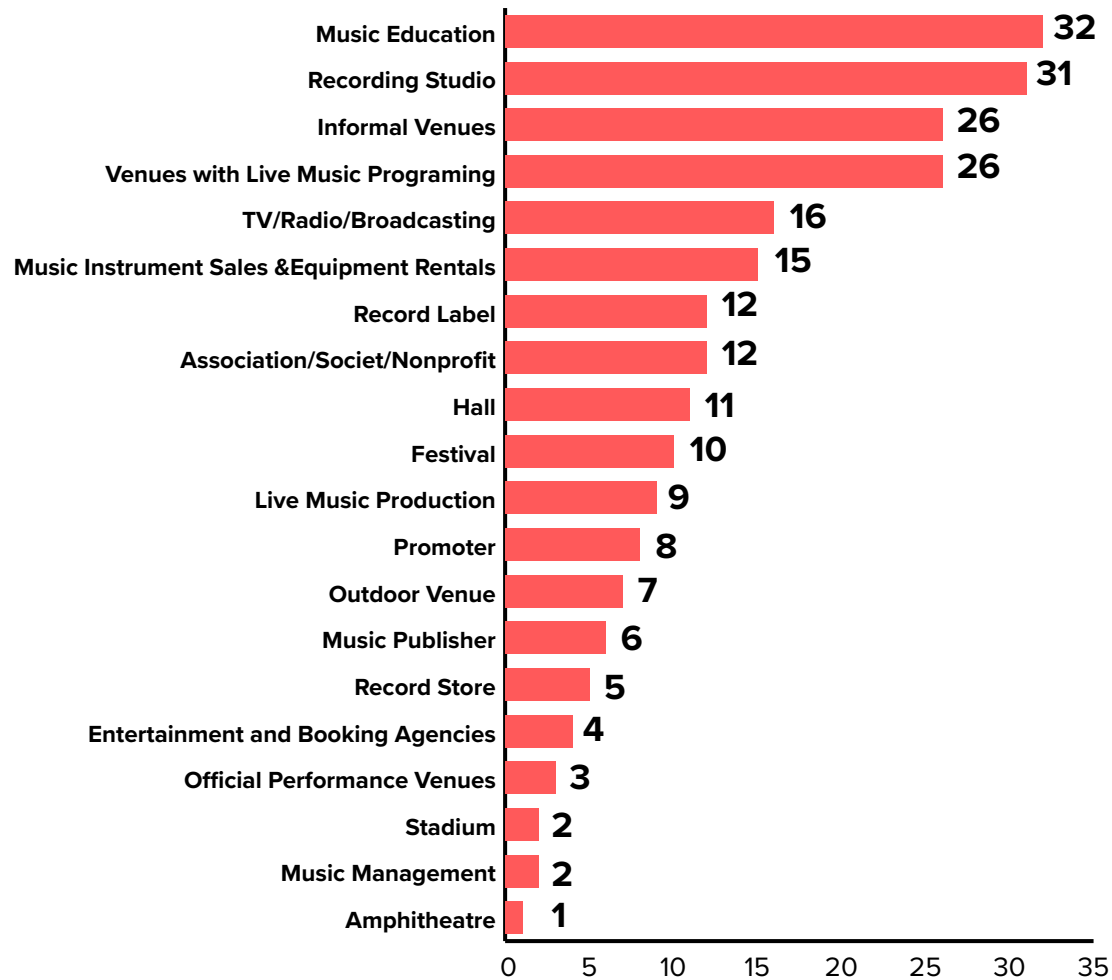


FIGURE 47

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

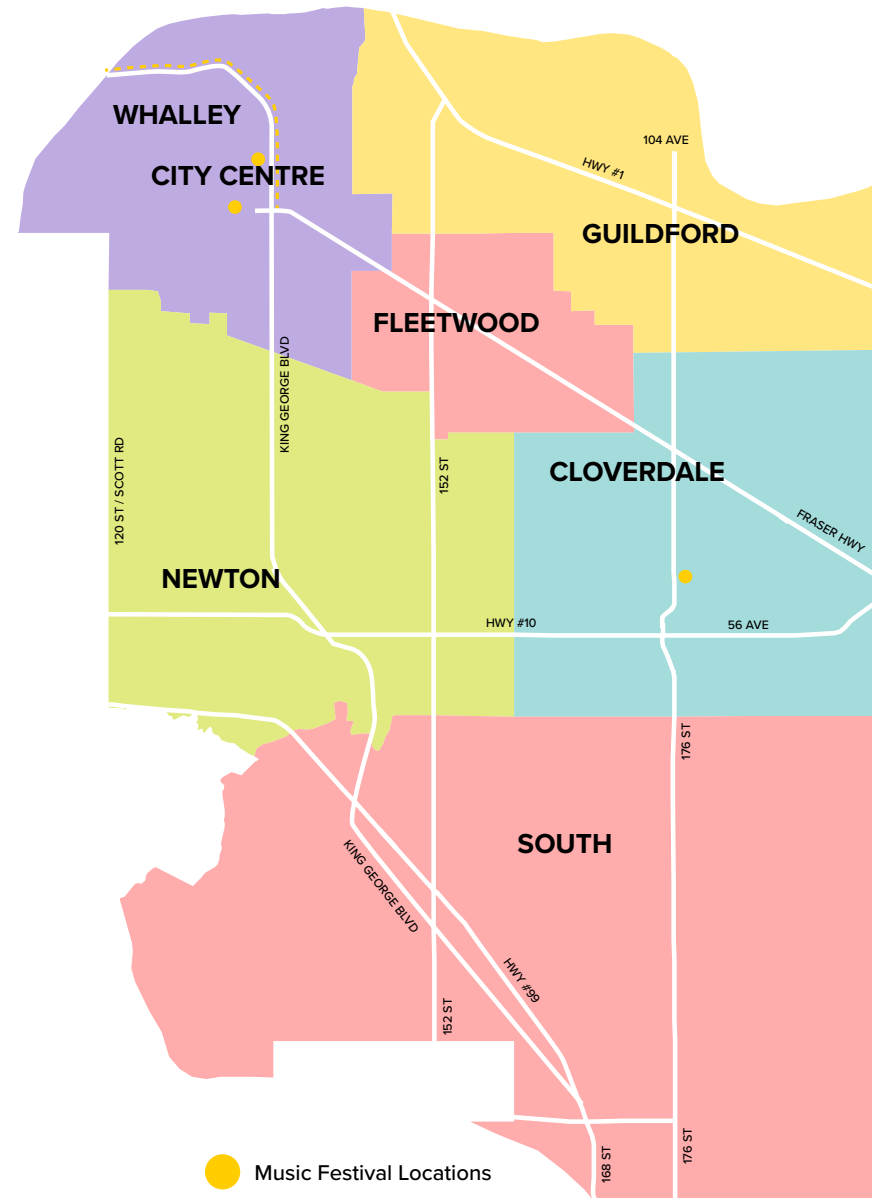


FIGURE 49

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

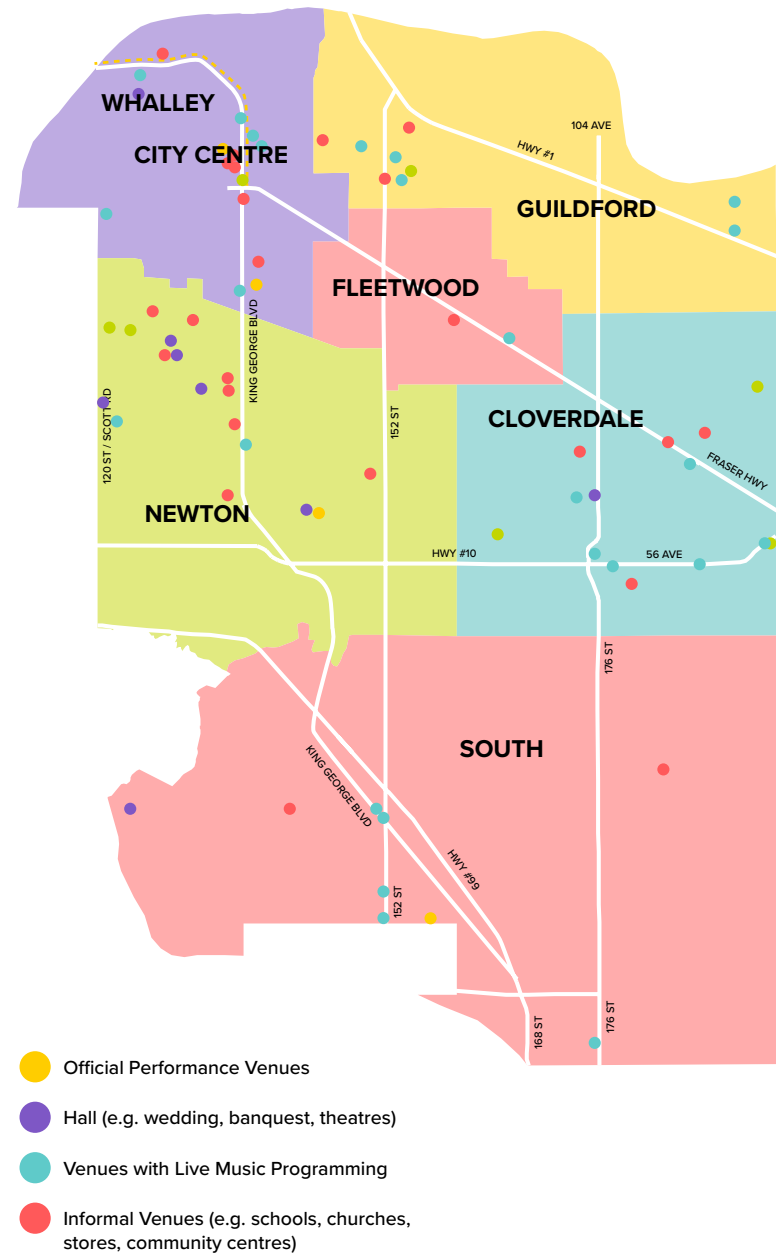


FIGURE 50

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

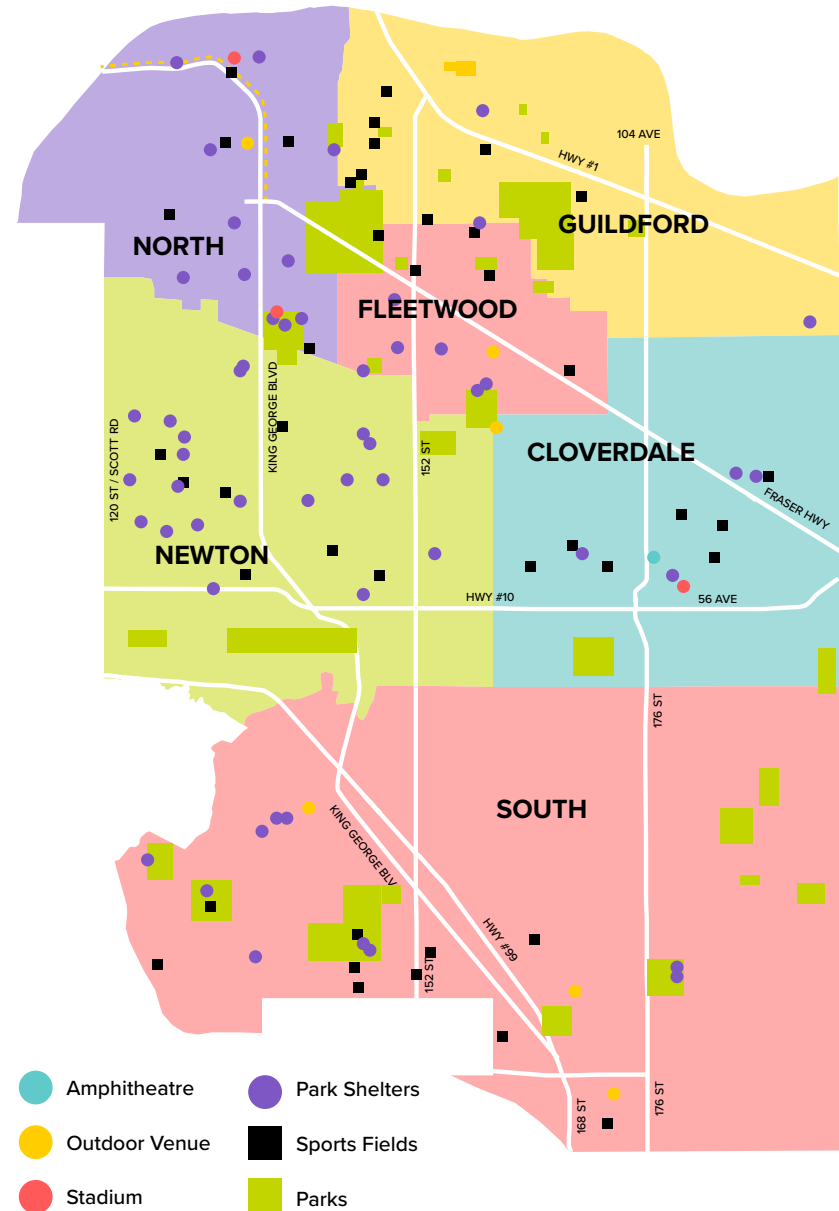


FIGURE 51

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

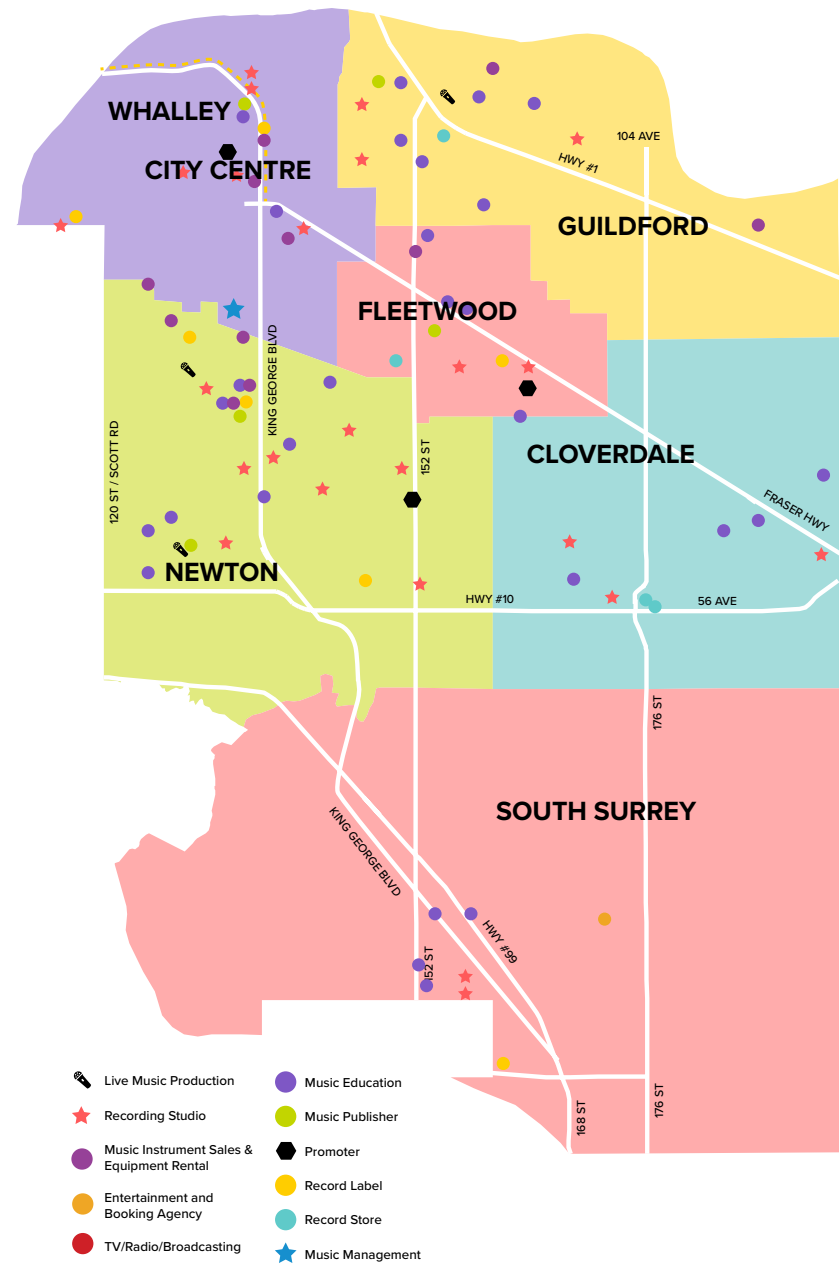
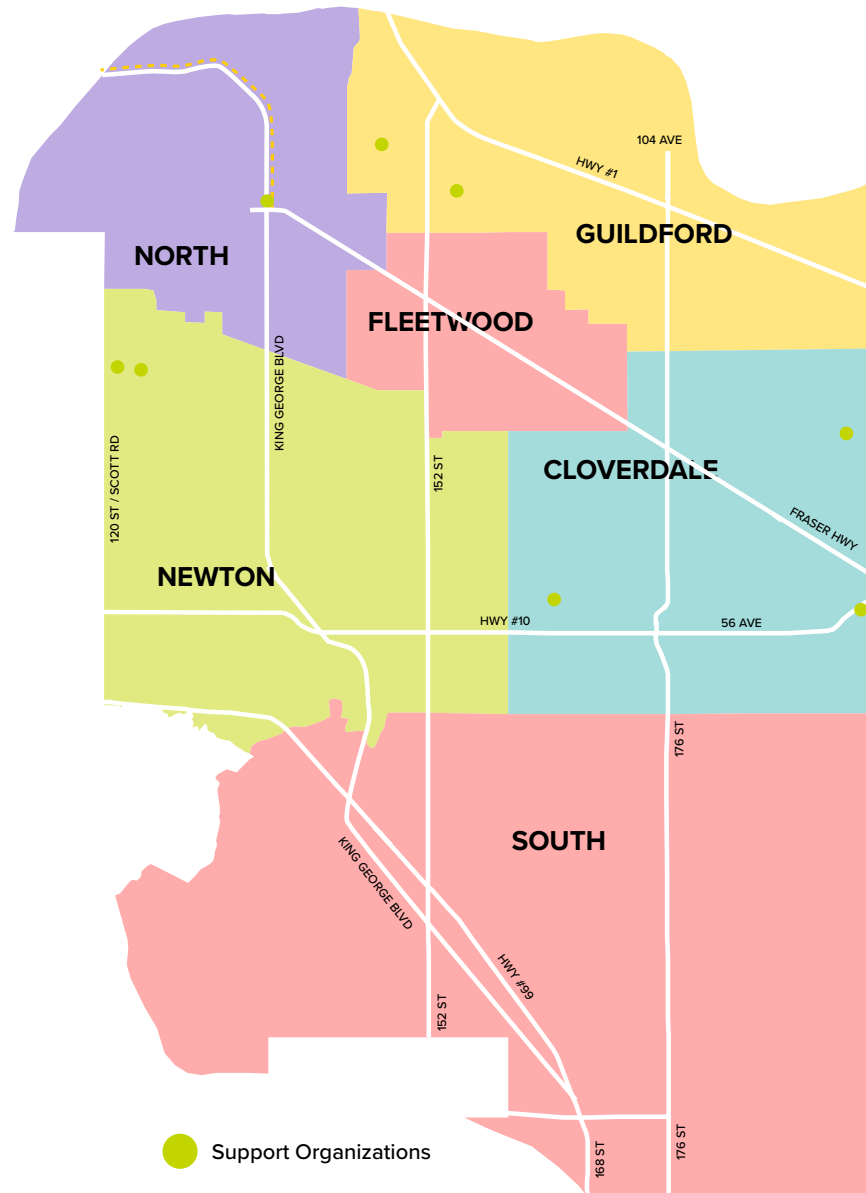


FIGURE 52

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

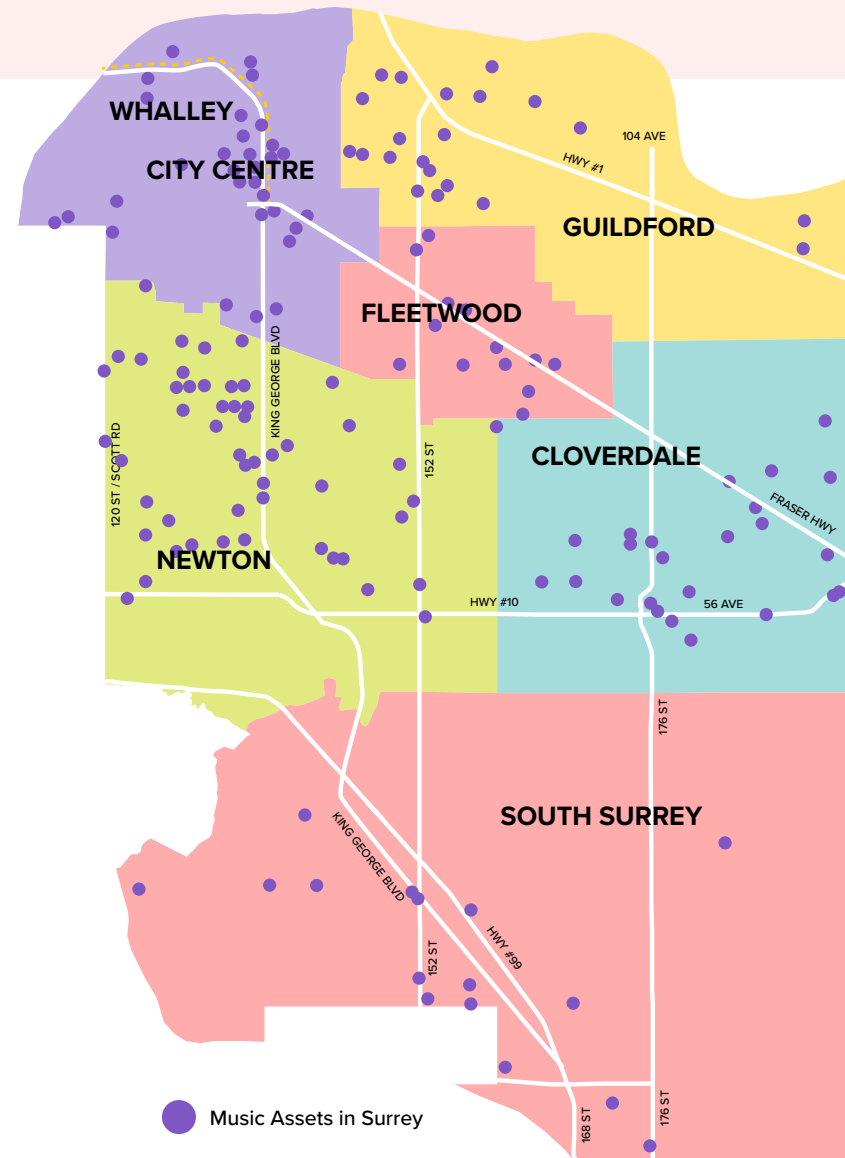


Table 19 - Rank of Greatest Number of Music-Related Assets by Neighbourhood

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

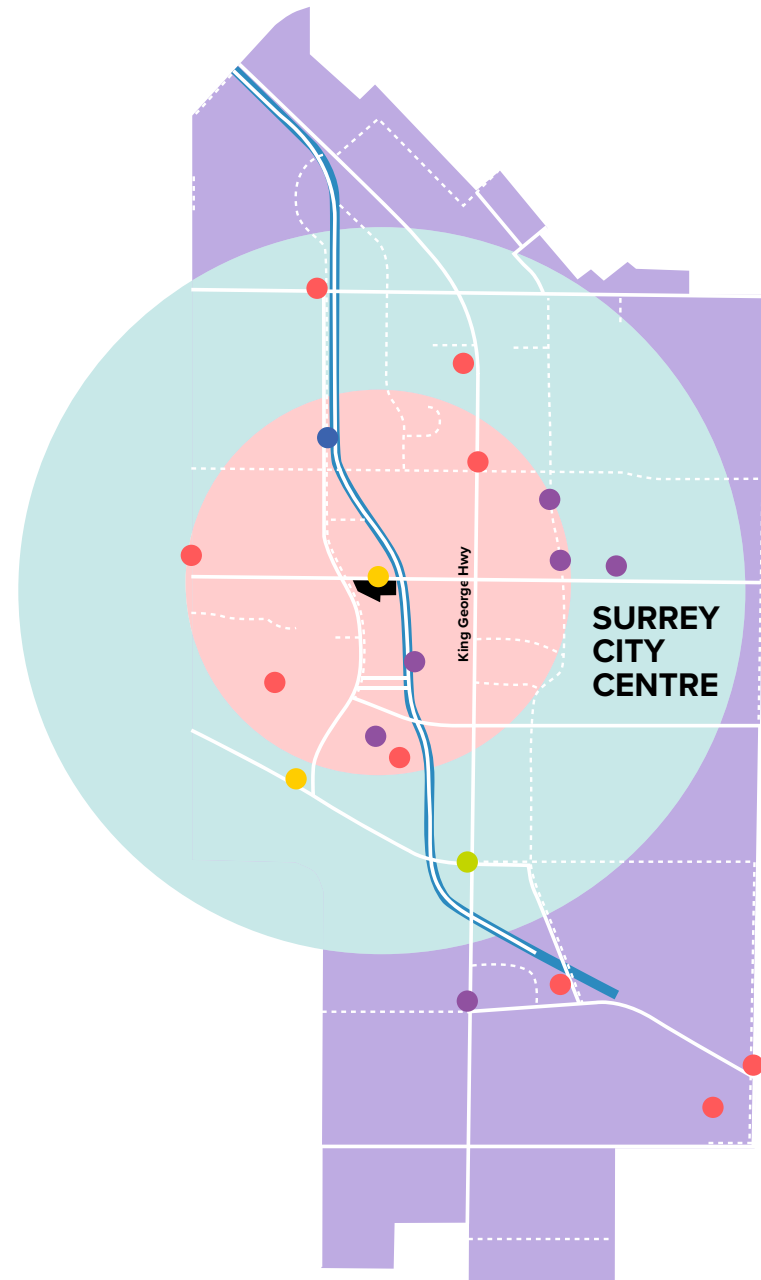
FIGURE 54

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



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