
POST-MEETING

General Committee

Date: May 7, 2025
Time: 9:30 AM
Location: Council Chambers, Civic Centre, 2nd Floor
300 City Centre Drive, Mississauga, Ontario, L5B 3C1
and Online Video Conference

Members

Deputy Mayor and Chair Matt Mahoney	Ward 8
Deputy Mayor and Vice-Chair John Kovac	Ward 4
Mayor Carolyn Parrish	Mayor
Councillor Stephen Dasko	Ward 1
Councillor Alvin Tedjo	Ward 2
Councillor Chris Fonseca	Ward 3
Councillor Natalie Hart	Ward 5
Councillor Joe Horneck	Ward 6
Councillor Dipika Damerla	Ward 7
Councillor Martin Reid	Ward 9
Councillor Sue McFadden	Ward 10
Councillor Brad Butt	Ward 11

To Request to Speak on Agenda Items - Advance registration is required. To make a Deputation please email Angie Melo, Legislative Coordinator at Angie.melo@mississauga.ca or call 905-615-3200 ext. 5423 no later than **Monday, May 5, 2025 before 4:00 PM.**

Questions for Public Question Period – To pre-register for Public Question Period, questions may be provided to the Legislative Coordinator at least 24 hours in advance of the meeting. Following the preregistered questions, if time permits, the public may be given the opportunity to ask a question on an agenda item. Virtual participants must pre-register.

Virtual Participation - All meetings of Council are streamed live and archived at Mississauga.ca/videos. To speak during the virtual meeting or if you do not have access to the internet, contact the Legislative Coordinator and you will be provided with directions on how to participate. Comments submitted will be considered as public information and entered into the public record.

Contact

Angie Melo, Legislative Coordinator, Legislative Services
905-615-3200 ext. 5423 | Email: angie.melo@mississauga.ca

Find it Online

<http://www.mississauga.ca/portal/cityhall/councilcommittees>

An asterisk (*) symbol indicates an Item that has been either Revised or Added

1. **CALL TO ORDER**

2. **INDIGENOUS LAND STATEMENT**

“We acknowledge the lands which constitute the present-day City of Mississauga as being part of the Treaty and Traditional Territory of the Mississaugas of the Credit First Nation, The Haudenosaunee Confederacy the Huron-Wendat and Wyandotte Nations. We recognize these peoples and their ancestors as peoples who inhabited these lands since time immemorial. The City of Mississauga is home to many global Indigenous Peoples.

As a municipality, the City of Mississauga is actively working towards reconciliation by confronting our past and our present, providing space for Indigenous peoples within their territory, to recognize and uphold their Treaty Rights and to support Indigenous Peoples. We formally recognize the Anishinaabe origins of our name and continue to make Mississauga a safe space for all Indigenous peoples.”

3. **APPROVAL OF AGENDA**

4. **DECLARATION OF CONFLICT OF INTEREST**

5. **MINUTES OF PREVIOUS MEETING**

5.1 General Committee Minutes - April 23, 2025

6. **PRESENTATIONS - Nil**

7. **DEPUTATIONS**

Any member of the public interested in making a deputation to an item listed on the agenda must register by calling 905-615-3200 ext. 5423 or by emailing angie.melo@mississauga.ca by **Monday, May 5, 2025** at 4:00 PM

Each Deputation to Committee is limited to speaking not more than 10 minutes.

Pursuant to Section 57.1 of the Council Procedure By-law 0044-2022, as amended:

Deputations shall be received and the matter shall be referred to staff for a report, unless there is a resolution or recommendation passed to “receive” the Deputation. After a Deputation is completed, Members shall each have one opportunity to make a preamble statement and ask questions to the Deputant(s) or staff for clarification purposes only, and without debate.

7.1 Ben Gallagher, Manager, Office of Emergency Management, with respect to Emergency Preparedness Week 2025

7.2 Item 10.1 Megan Lynch, Nordicity (Economic Impact of Live Music in Mississauga)

7.3 Item 10.1 Erin Benjamin, Canadian Live Music Association

7.4 Item 10.1 Corey Poole, and Carmen Ford City of Mississauga (Economic Impact of Live

Music In Mississauga)

- *7.5 Mike Douglas, Executive Director and Sherri Parliament, Communications Manager with respect to MAC Update and performance by Sauga Song Winner Joelle Rose

*Presentation added

- *7.6 Councillor Joe Horneck, with respect to Alectra Annual General Meeting and Enersource Quarterly Update

*Presentation added

8. PUBLIC QUESTION PERIOD - 15 Minute Limit

Public Comments: Members of the Public that have a question about an item listed on the agenda may pre-register by contacting the Legislative Coordinator at least 24 hours in advance of the meeting . Following the registered speakers, if time permits the Chair will acknowledge members of the public who wish to ask a question about an item listed on the agenda. Virtual participants must pre-register.

Pursuant to Section 58 of the Council Procedure By-law 0044-2022, as amended:

General Committee may grant permission to a member of the public to ask a question of General Committee, with the following provisions:

1. Questions may be submitted to the Clerk at least 24 hours prior to the meeting;
2. A person is limited to two (2) questions and must pertain specific item on the current agenda and the speaker will state which item the question is related to;
3. The total speaking time shall be five (5) minutes maximum, per speaker, unless extended by the Mayor or Chair; and
4. Any response not provided at the meeting will be provided in the format of a written response.

9. CONSENT AGENDA

10. MATTERS TO BE CONSIDERED

- 10.1 Economic Impact of Live Music in Mississauga
- 10.2 Single Source Approval for Self Contained Breathing Apparatus (SCBA) Equipment for Mississauga Fire & Emergency Services
- 10.3 2025 Traffic Calming Program (Ward 2, Ward 4, Ward 6, Ward 7, Ward 8, and Ward 11)

11. ADVISORY COMMITTEE REPORTS

- 11.1 Mississauga School Traffic Safety Action Committee Recommendation Report 3 - 2025 - dated April 30, 2025

12. CORRESPONDENCE - Nil

13. MATTERS PERTAINING TO REGION OF PEEL COUNCIL

14. COUNCILLORS' ENQUIRIES

15. OTHER BUSINESS/ANNOUNCEMENTS

16. CLOSED SESSION

(Pursuant to Section 239(2) of the *Municipal Act, 2001*)

16.1 Information Explicitly Supplied in Confidence to the Municipality or local board by Canada, a province or territory or a Crown agency of any of them

Delegation of Authority - Acquisition, Disposal, Administration and Lease of Land and Property - July 1, 2024, to December 31, 2024

*16.2 Advice that is subject to solicitor-client privilege, including communications necessary for that purpose

Encampments (Verbal Update)

17. ADJOURNMENT

Hear and Now:

Impact of Live Music in Mississauga

Introduction to Impact Assessment

The project focused on **quantifying the economic impacts** and identifying the **unique social impacts, needs and opportunities** associated with Mississauga's live music ecosystem.

Specifically, this study:

- Provides a baseline to measure future economic growth of Mississauga's live music sector.
- Supports funding applications from the City of Mississauga, local event organizers, and businesses.
- Enables companies and organizations to make data-driven decisions.



Scope of the Project

- Assessment included survey, in-person engagements, desk research and analysis.
- Impacts extend beyond economic -- e.g., community identity, city building, branding.
- Live Music represents only a portion of the city's whole music economy.
- Focused on "Live Music" as it was identified as an underdeveloped sector / major growth area.
- Data from 2023 – perfect baseline period to measure future growth and investment.
- Secondary industries (e.g., transportation, hospitality), and fields like music education and music therapy, fell outside the scope of this study.
- Findings can be considered conservative estimates.



Mississauga's Results

Live Music in Mississauga generates:

\$28 million to GDP

290 (FTE) jobs

\$14.7 MILLION
IN LABOUR INCOME

\$10.9 MILLION
IN TOTAL TAX REVENUE



Mississauga Sector Profile:

111


live music assets

29

venues

Higher-than-average
share of musicians




Building reputation as
a **music hub**

Strong **incubator** for artists and live music workers
– a gap in the Canadian industry

Needs & Opportunities for Growth

Mississauga could unlock even greater economic, tourism, and social benefits through live music.

Growth can be supported by...

- 1 | Supporting Places to Play
- 2 | Growing Reputation as Music Hub
- 3 | Strengthening Grassroots Infrastructure
- 4 | Addressing Financial Pressures
- 5 | Developing Talent & Artist Discovery

Hear and Now:

Understanding the economic power and
potential of Canada's live music industry

The Big Numbers

Hear and Now estimated that, in **2023** alone, live music industry operations and live music tourism combined generated:

\$10.92 billion in GDP

101,640 FTE's

\$3.73 BILLION IN
TAX DOLLARS

\$5.84 BILLION IN
LABOUR INCOME

Contextualizing Live Music's Impact

The economic impact of Canada's Live Music industry rivals that of other Canadian industries.



The **\$10.92 billion in GDP** generated by Live Music is:

- **More than 4 X** the GDP generated by Canada's **fisheries industry** (~\$2.6 billion to GDP).
- **Nearing** the GDP generated by the **automotive industry** (~\$14 billion to GDP).



Strengths

The industry thrives thanks to **five key pillars:**



1.

Diversity of talent and genres

2.

Resilience and adaptability

3.

Community and collaboration

4.

**Professional development
and support**

5.

International recognition



Areas of concern

Still, the industry faces real and growing challenges.

Hear and Now has identified four key areas of concern:



Areas of Need

To support a strong and sustainable future for live music in Canada, the study highlights six key areas of need:



1.

Venues and rehearsal spaces

2.

Representation and safety

3.

Talent development and capacity building

4.

Compensation and working conditions

5.

Business models and market access

6.

Tourism and promotion



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Background & Benefits

Music Strategy recommended to “Measure and understand the value of Mississauga’s music economy”

Partnership with the Canadian Live Music Association (CLMA)’s national study provided:

- opportunity to align methodology
- cost and administrative savings
- insights from comparison to national findings



Analysis

- Live Music in Mississauga is an **underdeveloped sector with huge growth potential**
- Music Strategy actions support sector needs
- Continue to create concerts & attract festivals, conferences
- Continue building our reputation as an incubator and music hub



Progress – Industry Recognition

2023



**Music City
of the Year**

2024



Hosted **Country Music Association of Ontario Awards** and **Folk Music Ontario Conference**

Folk Music Ontario alone generated:

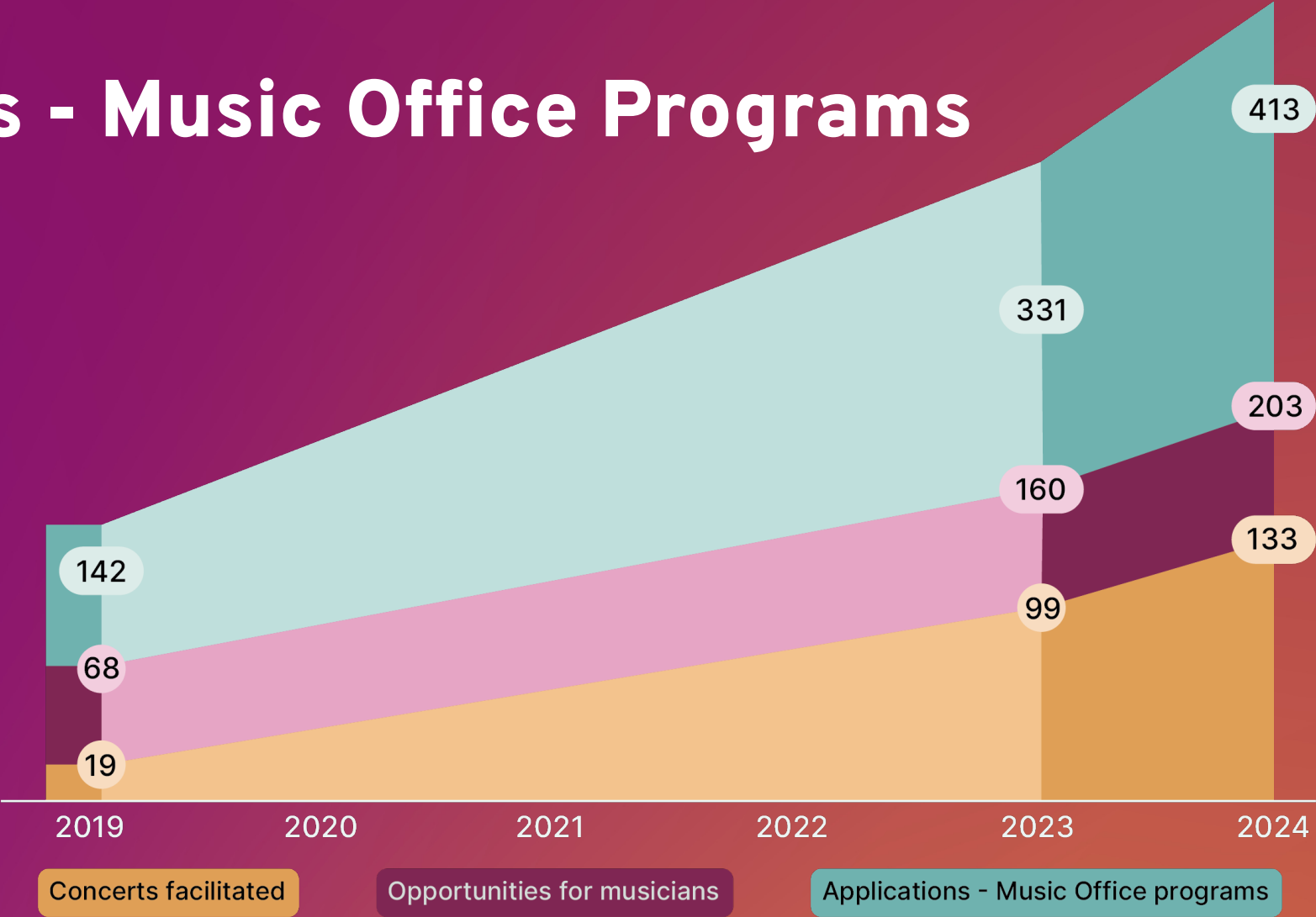
- 800 room nights
- 791 music industry delegates in City Centre
- Nearly **\$400,000 in visitor spending**

2025



Mississauga selected as NXNE's first-ever Spotlight City

Progress - Music Office Programs



In Summary

Live Music in Mississauga is an **underdeveloped sector with huge growth potential**

Data shows Music Strategy actions **address sector needs** and are growing our reputation as a music hub

Study provides a crucial benchmark to measure **impact of Mississauga's work and investment**



mississauga arts council presents

mississauga 20 arts awards 25

june 19, 2025

mississauga
convention centre

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macarts.ca/martys



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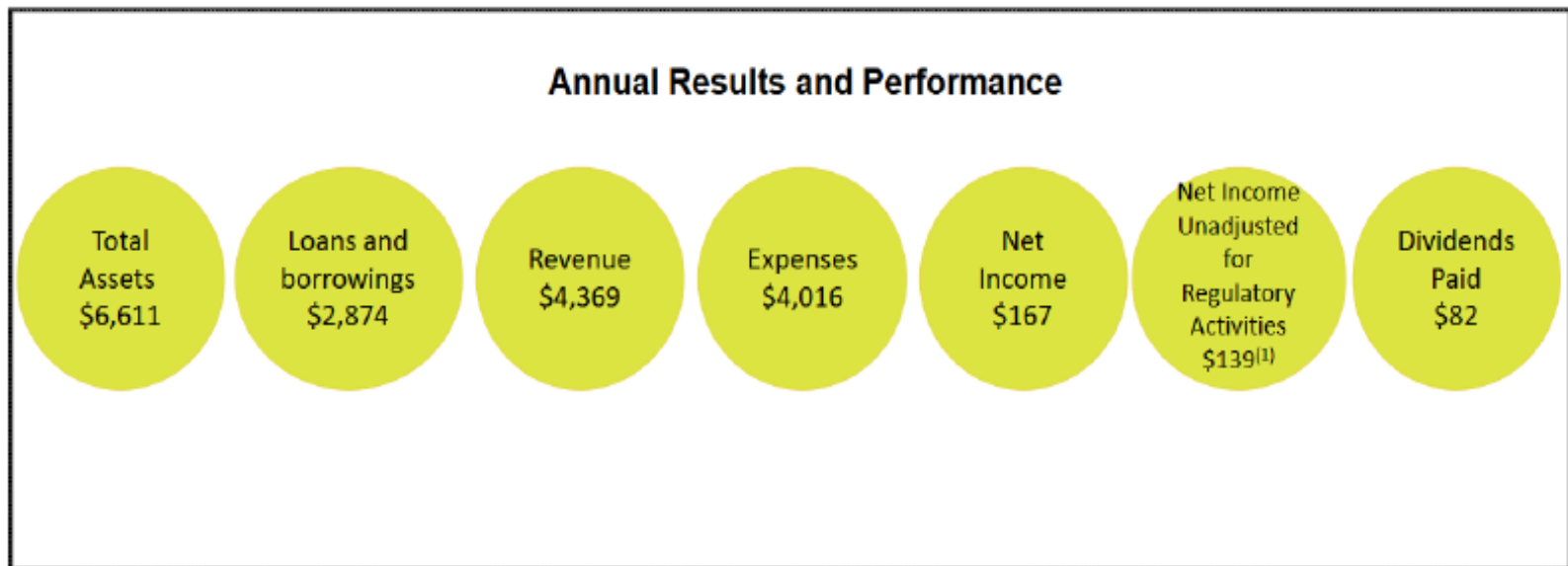
Alectra – Annual General Meeting Enersource - Quarterly Meeting

Update to Council by Councillor Horneck

2025 Alectra AGM – Summary

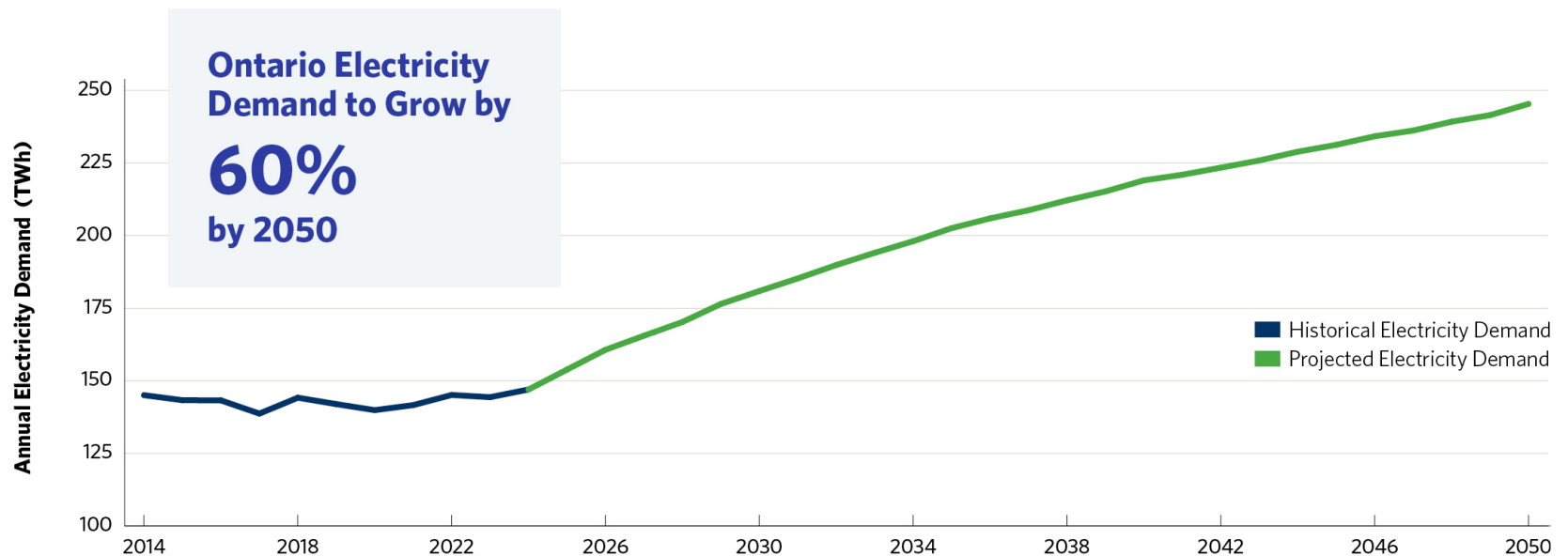
- 1) Jane Armstrong is the new board chair replacing Mississauga appointee Norman Loberg.
- 2) Net Income was \$138.5 million = \$8million more then expected.

2024 FINANCIAL RESULTS AT A GLANCE



Electricity Demand Growth

Ontario Electricity Demand Historical and Forecast



3) 2027-2031 there is an application to OEB for a rebase of electricity rates subject approval. Alectra have not been able to rebase for 10 years post merger vs Toronto Hydro has done two.

4) Recent Dividend history. Dividend set as 60% of net income.

Enersource Investment In Alectra (per audited financial statements)

In \$000s

	2024	2023	2022	2021	2020	2019	2018	2017
Balance, beginning of year	617,397	598,113	607,902	597,800	600,243	609,060	593,079	583,028
Share of Net income from Investment in Alectra	49,175	42,285	10,890	30,185	22,321	18,008	32,917	23,330
Share of other comprehensive income / (loss)	710	(325)	7,393	2,070	(1,183)	(4,436)	1,860	(4,650)
Dividends received from Alectra	(23,879)	(22,676)	(28,072)	(22,153)	(23,581)	(23,860)	(18,796)	(8,629)
Gain from Acquisition of Guelph hydro	-	-	-	-	-	1,471	-	-
Ending balance - Investment in Alectra	643,403	617,397	598,113	607,902	597,800	600,243	609,060	593,079

Enersource Quarterly

- Total Shareholder Equity Rose \$27.9m or 4.4% last year

- Enersource Debt balance is now \$40.9m. Since 2017 we have retired \$30m in debt.

	2024	2023
Assets		
Current Assets		
Cash	6,127	5,889
Accounts receivable	21	-
Prepaid expenses	25	295
Total Current Assets	6,173	6,184
Non-Current Assets		
Investment in Alectra Inc. (Note 5)	643,403	617,397
Interest rate swap (Note 6)	99	344
Total Non-Current Assets	643,502	617,741
Total Assets	649,675	623,925
Liabilities and Shareholders' Equity		
Current Liabilities		
Trade payables	304	41
Loans and borrowings (Note 6)	2,500	2,500
Total Current Liabilities	2,804	2,541
Non-Current Liabilities		
Loans and borrowings (Note 6)	38,125	40,625
Total Non-Current Liabilities	38,125	40,625
Total Liabilities	40,929	43,166
Shareholders' Equity		
Share capital (Note 7)	175,691	175,691
Accumulated other comprehensive income	2,557	1,847
Retained earnings	430,498	403,221
Total Shareholders' Equity	608,746	580,759
Total Liabilities and Shareholders' Equity	649,675	623,925

City of Mississauga Corporate Report



Date: April 15, 2025

To: Chair and Members of General Committee

From: Nadia Paladino, Acting Commissioner of Community Services

Originator's files:

Meeting date:
May 7, 2025

Subject

Economic Impact of Live Music in Mississauga

Recommendation

That the Corporate Report entitled "Economic Impact of Live Music in Mississauga" and the appendices dated April 15, 2025, from the Commissioner of Community services be received for information.

Executive Summary

- An economic impact analysis of Mississauga's music sector is a recommendation from the Music Strategy (2022-2026) wherein staff identified a lack of local data.
- A study of Mississauga's live music sector was conducted alongside the first-ever national study on the economic impact of Canada's live music industry. Both the national study and Mississauga study were conducted by Nordicity with support from the Canadian Live Music Association.
- The Mississauga study finds that our live music sector:
 - Adds an estimated \$28 million to Mississauga's GDP
 - Supports an estimated 290 full-time equivalent (FTE) jobs and generates \$14.7 million in labour income; and
 - Is a strong incubator for artists & live music workers and Mississauga is building a reputation as a music hub.
- The national study finds that Canada's live music industry generates \$10.92B in GDP and 101,640 FTE jobs, illustrating an enormous growth opportunity for Mississauga.

Background

The approved Mississauga Music Strategy illustrates the many benefits of a vibrant music economy including job creation, tourism, City brand-building, and attraction and retention of skilled workers.

When crafting this Strategy, staff identified a shortage of data specific to Mississauga's music economy. To better understand this sector, as well as to provide a baseline to measure future growth and impact of the City's investment, the Music Strategy recommended conducting an economic impact analysis.

In 2023, the Canadian Live Music Association (CLMA) began work on the first-ever national economic impact analysis of live music in Canada. Staff worked with CLMA to include a Mississauga-specific report alongside the national study. Benefits of this approach include aligned methodology, understanding Mississauga's growth potential within the wider Canadian live music industry, and administrative savings.

Present Status

The completion of this study allows the City of Mississauga, its residents, businesses, stakeholders, and other levels of government to appreciate live music in Mississauga as a driver of employment, economic impact and cultural growth. Importantly, this study also:

- Provides a baseline against which to measure future growth Mississauga's live music sector.
- Supports future provincial and federal funding applications from the City of Mississauga, local event organizers, and businesses.
- Enables companies and organizations to make data-driven decisions.
- Showcases areas of opportunity and need in the local live music industry.

Comments

Mississauga's study represents only a portion of the city's whole music economy as the study specifically examines live music. "Live music" is defined as music played by an individual or group in front of a live audience. The recorded music side of the industry was not part of this study.

The focus on live music is helpful for Mississauga as it is a major growth area identified in the Music Strategy. Live music brings significant revenue opportunities for musicians, builds more vibrant neighbourhoods for residents and visitors, and contributes heavily to tourism. While there are several secondary industries that support live music, they are not included in the scope of this study. For instance, the transportation and hospitality industries play significant roles in facilitating live music events. Additionally, fields like music education and music therapy

General Committee	2025/04/15	3
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make use of components of live music. However, these secondary industries fall outside the focus of this study.

Mississauga’s study was completed using data from 2023, which was the second of a five-year implementation plan for the City’s Music Strategy. 2023 was the first year of the Live Music Grant and other key actions from the Strategy and, as such, 2023 data serves as an excellent baseline from which to measure growth of the sector and impact of the City’s investment in future years.

Strategic Plan

This study results from the City’s first Music Strategy (2022-2026), which recommends to “Measure and understand the value of Mississauga’s music economy.”

Engagement and Consultation

The Hear and Now Survey was launched to the public on April 30, 2024, and closed on July 12, 2024, as the primary financial data collection tool for this project. At a national level, a total of 387 completed responses were received, plus an additional 264 partial responses with usable data. Of those completed responses, 22 came from Mississauga-based professionals, of which over half (59%) were self-managed artists, musician performers, bands, DJs, choirs, or related; 23% answered on behalf of a music business or performing arts organization; and 18% were freelancers in the music industry.

A roundtable discussion with music industry professionals in Mississauga was held in May 2024 to gather qualitative findings about the industry. This industry roundtable was supplemented by a selection of key informant interviews with Mississauga-based music professionals and other relevant parties.

Secondary sources include reports and figures from the City of Mississauga, Mississauga Arts Council, Statistics Canada, and the International Federation of the Phonographic Industry.

Economic impacts of live music companies’ operations as well as tourism spending associated with live music were estimated using primary data collected via the national Hear and Now Survey, select secondary research sources, and two economic impact modeling tools.

Financial Impact

There are no financial impacts resulting from the Recommendations in this report.

Conclusion

The completion of this Mississauga study achieves a key recommendation from the Music Strategy, provides valuable data for stakeholders, and will be used to inform the City's future work to support and grow our music economy.

Attachments

Appendix 1: Hear and Now: Impact of Live Music in Mississauga

Appendix 2: Hear and Now: Understanding the Economic Power and Potential of Canada's Live Music Industry



Nadia Paladino, Acting Commissioner of Community Services

Prepared by: Corey Poole, Music Development Coordinator, Recreation & Culture Division

Hear and Now: Impact of Live Music in Mississauga

Prepared for: City of Mississauga

January 2025

Table of Contents

Executive Summary	3
1. Introduction	4
1.1. Summary of Methodology	7
2. Profile of Live Music in Mississauga	9
2.1. Financial Profile: Industry Revenue, Expenses and Labour	12
3. Impacts of Live Music in Mississauga	16
3.1. Economic Impacts – Live Music Operations	17
3.2. Economic Impacts – Tourism	18
3.3. Social Benefits	20
3.4. The Role of Live Music within the Music Ecosystem	21
4. Where Mississauga Goes from Here: Areas of Opportunity and Need	22
4.1. Supporting Places to Play	22
4.2. Growing a Reputation (and Audiences)	23
4.3. Strengthening Grassroots Infrastructure	24
4.4. Addressing Financial Pressures	25
4.5. Developing Talent & Artist Discovery	27
5. Conclusion	28
Appendix: Summary of Live Music Assets	29



Photo by Adam Pulicichio

Executive Summary

Mississauga's live music sector delivers substantial economic benefits, contributing to the city's economy through both direct operations and associated tourism. The city's diverse talent pool and strategic growth efforts position it as an emerging leader in Ontario's live music landscape, poised for further economic growth. Mississauga's live music sector:

- Supports an estimated **290 full-time equivalent (FTE) jobs** and generates **\$14.7 million in labour income**.
- Adds an estimated **\$28 million to Mississauga's gross domestic product (GDP)**.
- Contributes **\$10.9 million in total tax revenue** and **\$1 million in property tax**.
- Is dynamic and diverse, reflecting the city's rich multicultural identities, and is home to over **111 live-music related assets** concentrated in three key hotspots: Port Credit, City Centre, and Streetsville.
- Punches above its weight, with a higher-than-average share of musicians among its professional artists compared to provincial averages, and a burgeoning ecosystem of festivals, venues, and community-driven initiatives.
- Serves as a strong incubator for artists and live music workers, strengthened by institutions such as Metalworks and a track record of producing internationally recognized artists.
- Is building a reputation as a music hub with recent accolades such as being named 2023 Music City of the Year, and hosting the CMAOntario Festival and Folk Music Ontario.



Photo by Adam Pulicichio

1. Introduction

This report serves as a companion to the Canadian Live Music Association’s **Hear and Now** National Economic Impact Assessment (EIA) report for the Canadian live music industry, offering a hyper-localized analysis that is specific to Mississauga. While the national report explores broader trends – such as industry-wide financial pressures, environmental impacts and sustainability, and emerging digital tools – this local study focuses on the unique impacts, needs, and opportunities associated with Mississauga’s live music ecosystem. This report details the local economic contributions of live music, including its direct, indirect, and induced impacts on Mississauga’s economy. It also highlights the tourism and fiscal ripple effects of live music activities within the city, and the broader sociocultural outcomes that a vibrant live music sector in Mississauga helps to support. Actionable insights are tailored to Mississauga’s context, ensuring that the city’s live music sector is positioned to thrive within the evolving regional and national landscape.

This work follows from the Mississauga Music Strategy, in part fulfilling Recommendation 10: “Measure and understand the value of Mississauga’s music economy,”¹ for which conducting an economic impact analysis was a supporting action. Moreover, many of the insights explored in this report help to quantify the degree to which the strategy’s objectives are being met.

¹ City of Mississauga. 2022. [Mississauga Music Strategy](#). Page 37.

Although this report focuses on Mississauga, the city's live music industry is shaped by many of the same trends driving rapid changes in the national live music landscape. Live music faces a complex future marked by such trends as rising environmental challenges, a growing imperative to advance equity and inclusion, and the unpredictable influence of artificial intelligence. These issues emerge as the sector continues to navigate the uncertainties of post-pandemic recovery, which have skewed the real potential for live music to support economic and social objectives.

Despite these challenges, live music remains a powerful industry that contributes substantial value to both the overall Canadian economy and the local economy in Mississauga. However, until now those economic contributions have largely gone unmeasured. With increased support and strategic focus, the live music sector in Mississauga has the potential to generate even greater benefits for the local economy.

Why is this data useful?

The data will enable Mississauga's live music industry to measure its economic contributions and communicate its broader value to the city, including social and cultural impacts. Additionally, the findings will support the local industry in identifying and addressing existing challenges and opportunities. The primary objectives of **Hear and Now**, as they pertain to Mississauga, are to:

- Provide a baseline against which to measure future growth of the Mississauga live music sector.
- Support future provincial and federal funding applications from the City of Mississauga, local event organizers, and businesses.
- Enable companies and organizations to make data-driven decisions.
- Showcase areas of opportunity and need in the local live music industry.

Armed with the data in this report, live music professionals and advocates in Mississauga will be better positioned to realize the desired 'result' of Recommendation 10 of the Mississauga Music Strategy: ensuring that "the City, its citizens, stakeholders, and other levels of government appreciate the power of music as a driver of employment, economic impact and cultural growth, and believe it is worthy of investment."²

How is live music defined?

"Live music" is defined as music played by an individual or group in front of a live audience.³ Although the industry also encompasses many types of performances in many different settings and forms – whether intimate shows at cafés, bars and parks, performances in concert halls and underground spaces, or massive stadium concerts – at its core, the emphasis on in-person settings is what makes the industry unique, distinguishing it from its recorded music counterpart.

For the purposes of this report, the various aspects of the live music industry were categorized as follows:

² City of Mississauga. 2022. [Mississauga Music Strategy](#). Page 37.

³ Canadian Live Music Association (CLMA) and Nordicity. 2024. [Hear and Now: Impacts of the Live Music Industry in Canada](#).

Table 1: Live Music Industry Categorization Framework

Category	Sub-Category	Description/Examples
Venues	Core Live Music Venues	Dedicated live music venues such as concert halls, theatres, performing arts centres, and amphitheaters.
	Occasional Live Music Venues	Occasional live music venues such as bars, pubs, cafés, restaurants, clubs, convention centres, sports arenas, and banquet halls.
Professional Services	Live Music Promoters	
	Live Music Recording or Rehearsal Spaces	
	Live Music Managers/Agents	
	Live Music Production	
	Live Music Equipment Rentals and Supplies	
	Live Music Support Organizations	Such as industry associations or societies.
Professional Organizations	Artist Entrepreneurs	Those who run a business as an artist, musician, DJ, band, or related.
	Choirs	
	Orchestras	
Showcase and Celebration	Music Festivals and Events	
	Indigenous Live Music	Such as powwows.
	Cultural Festivals with Live Music	
	Award Shows	

Source: This categorization was developed by Nordicity, informed through engagements with industry leaders across Canada.

While there are several secondary industries that support live music, they are not included in the scope of this study. For instance, the transportation and hospitality industries play significant roles in facilitating live music events. Additionally, fields like music education and music therapy make use of components of live music. However, these secondary industries fall outside the focus of this study.

1.1. Summary of Methodology

Several research methods were employed to collect and analyze data for this report. These tools and techniques are explained below.

National Survey

The *Hear and Now* Survey was launched to the public on April 30, 2024, and closed on July 12, 2024, as the primary financial data collection tool for this project. In addition, the survey also gathered non-financial information to help inform analysis on the strengths and needs of the industry, as well as non-economic impacts (including social impacts). At a national level, a total of 387 completed responses were received, plus an additional 264 partial responses with usable data. Of those completed responses, 22 came from Mississauga-based professionals, of which over half (59%) were self-managed artists, musician performers, bands, DJs, choirs, or related; 23% answered on behalf of a music business or performing arts organization; and 18% were freelancers in the music industry.

Engagements

Supplementary to the national survey, a roundtable discussion with music industry professionals in Mississauga was held in May 2024 to gather qualitative findings about the industry. This industry roundtable was supplemented by a selection of key informant interviews with Mississauga-based music professionals and other relevant parties.

Secondary Research

Primary research findings were cross-referenced with existing literature and secondary sources for validation. The Mississauga Music Strategy served as a guiding document throughout the process, and this report identifies areas of alignment between its research findings and the strategy's objectives.⁴ Other sources were reviewed and cited throughout this report, such as local resources from the City of Mississauga and Mississauga Arts Council, and national data from Statistics Canada and the International Federation of the Phonographic Industry (IFPI).

Economic Impact Assessments

The economic impacts of live music companies' operations as well as tourism spending associated with live music were estimated using primary data collected via the national *Hear and Now* Survey, select secondary research sources, and two economic impact modeling tools (including Nordicity's proprietary MyEIA™ model, and a customized tourism model informed by MyEIA™ and the Government of Ontario's Tourism Regional Economic Impact Model). A summary of the data sources and analytical tools used are provided in the table below.

⁴ City of Mississauga. 2022. [Mississauga Music Strategy](#).

Table 2: EIA Data Sources and Analytical Tools

Impact Area	Data Sources and Analytical Tools Used
Live music company operations	National <i>Hear and Now</i> Survey MyEIA™
Tourism spending and impacts	National <i>Hear and Now</i> Survey Ontario Arts and Culture Tourism Profile (as informed by the National Travel Survey, Visitor Tourism Survey, and National Tourism Indicators) Customized tourism EIA™ model



Photo by Adam Pulicichio

2. Profile of Live Music in Mississauga

Mississauga is home to a highly diverse and varied live music scene.

Mississauga has a vibrant live music scene that reflects the city's multicultural identity.^{5,6} Live music in Mississauga is shaped by a wide array of genres, with numerous festivals – such as Mississauga World Music Festival, Japan Festival Canada, Bollywood Monster Mashup, South Asian Festival of Mississauga, Philippines Festival, and Carassauga to name a few – attracting audiences and showcasing the city's diversity. Moreover, festivals like Southside Shuffle and Paint the Town Red are annual events that attract renowned musicians to perform in Mississauga.

The genres present in Mississauga continue to grow as the community evolves. At present, industry roundtable participants note that the city is home to strong jazz and classical scenes, especially with the presence of the Mississauga Big Band Jazz Ensemble and the Mississauga Symphony Orchestra. Moreover, there are burgeoning pockets of new musical activity taking place – especially in hip-hop, afrobeats, and reggaeton – but this activity tends to be less known and promoted within the community. Industry roundtable participants note that genres tend to be siloed, though there is much opportunity for greater

⁵ City of Mississauga. N.d. “Equity, Diversity and Inclusion.”

⁶ Data from Statistics Canada, 2021 Census of Population illustrates that Mississauga is home to a sizeable South Asian community, comprising 25% of its total population. The ten most frequent ethnicities or cultures in Mississauga include Indian, Chinese, English, Canadian, Pakistani, Irish, Filipino, Scottish, and Polish.

cross-pollination to boost audiences and to widely celebrate all that Mississauga's live music scene has to offer.

Mississauga punches above its weight when it comes to live music activity.

Overall, there are approximately 2,800 professional artists in Mississauga, representing about 0.7% of the city's labour force. Of these artists, 24% are musicians (about 660 total), which is higher than the provincial benchmark of 18%.⁷

Additionally, Mississauga's live music scene is comprised of **111 identified industry assets** including venues, professional services (e.g., production, managers), professional organizations (e.g., artist entrepreneurs, choirs, orchestras), festivals, events, and cultural festivals. This figure is not exhaustive and will continue to change as the sector evolves. (For a breakdown of these assets, please see Table 9: Number of Live Music Assets in Mississauga in the Appendix. An interactive map of these assets is also [available on Tableau.](#))

Beyond its plethora of festivals, the local live music scene is buttressed by 29 venues, particularly bars and restaurants dotted along Port Credit (such as Shore Grill and Grotto, and Roc'n Doc's), music-first spaces including The Rec Room, and purpose-built City-owned spaces like the Living Arts Centre, Paramount Fine Foods Centre, and Celebration Square.

Mississauga is a strong incubator for artists and live music workers.

Mississauga has proven to be fertile ground for musical talent. The city has helped produce a number of successful artists – many of which have gone on to achieve national and international recognition. These artists include the likes of Billy Talent, PARTYNEXTDOOR, i!Scarlett, Jill Barber, Rick Emmett, Rich Kidd, Suzie McNeil, Triumph, and Mississauga-born Alessia Cara. While industry roundtable participants noted that artists do not always flaunt or maintain their "Mississauga-born" identity especially as they gain prominence, this trend is beginning to shift.

Moreover, several music programs, such as those at Cawthra Park Secondary School, and private institutions like Metalworks, provide young musicians and music workers with the training and resources needed to pursue careers in live music. Metalworks, in particular, is unique in providing programs for live music engineers – training that otherwise tends to be viewed as a gap across the province.⁸ Additionally, Mississauga benefits from its proximity to Toronto. Humber College sits near the city's border, with many Mississauga students attending programs and Mississauga musicians enlisted as instructors. These educational institutions feed a local talent pool that can help grow a thriving sector.

Mississauga is in a growth phase, building a reputation as a music hub.

Mississauga was recognized as Music City of the Year in 2023, highlighting its growing influence and commitment to a strengthened live music industry. Local awards shows, such as the MARTYs and the Mississauga Music Awards continue to celebrate local talent and accomplishments across the music

⁷ Statistics Canada. Census 2021 data.

⁸ CLMA and Nordicity. 2023. "[Reflections on Labour Challenges in the Live Music Industry.](#)"

industry – including live music. In recent years, Mississauga has also been selected to host Ontario’s premier country music festival, the CMAOntario Festival & Awards Weekend, as well as Folk Music Ontario, Canada’s largest gathering of the folk music industry.

Industry roundtable participants note that the city’s live music infrastructure is still developing. Much of the city’s infrastructure, like music venues and various initiatives launched to date, has been driven by grassroots efforts. That said, increased attention and support from the City of Mississauga – through initiatives like the creation of a Music Strategy – along with backing from organizations like the Mississauga Arts Council and Mississauga Music are helping to grow the city’s live music industry.

Mississauga’s live music scene is concentrated in three main hotspots.

Mississauga is a sprawling city, covering a sizeable geography with low-density. This expanse poses a challenge for building a cohesive music community, as audiences and artists are often spread out across the vast urban landscape. Nonetheless, the city’s live music scene continues to evolve, with a solid foundation of talent, venues, and cultural festivals contributing to its growing reputation as a dynamic epicentre for live music.

Industry roundtable participants note that the city’s sprawling nature has led to the emergence of key hotspots of live music activity, each with its own character and identity:

- **City Centre:** Mississauga’s downtown core is a central spot for live music, housing major retailer Square One and outdoor amphitheatre Celebration Square. Mississauga’s City Centre is also poised for significant population growth with new condominium developments that are attracting families, pointing to increased potential for live music audiences.
- **Port Credit:** Located on the waterfront, industry roundtable participants describe Port Credit as a major centre for live music activity in Mississauga. Several restaurants and bars dotting Port Credit put on live music, and a number of festivals including Buskerfest call the neighbourhood home. Given higher costs in the area, industry roundtable participants note that audiences tend to skew older compared to City Centre.
- **Streetsville:** Located north of Mississauga’s city centre, Streetsville was also noted as another major hotspot for live music in the city, though not as significant as City Centre and Port Credit.

Industry roundtable participants express that the Business Improvement Areas (BIAs) play a large role in supporting and growing live music in neighbourhoods, which has largely helped shape City Centre and in particular, Port Credit, into live music hubs within the city. There are signs of growth in other areas like Meadowvale, where new business meetups and venues such as the Meadowvale Theatre host shows. Additionally, the proximity of Pearson International Airport helps further boost live music in Mississauga. Nearly 45 million passengers passed through Pearson in 2023, suggesting significant opportunity to attract and showcase local talent to national and international audiences alike.⁹

⁹ Toronto Pearson. 2024. [“GTAA Reports 2023 Annual Results.”](#)



2.1. Financial Profile: Industry Revenue, Expenses and Labour

Mississauga's live music industry generates revenue, expenditures, and supports the labour force. The following high-level financial profile of the live music industry in Mississauga illustrates the financial and workforce environment that informs the local industry's broader economic impacts.

Revenue

Conservatively, Nordicity estimates that live music companies in Mississauga earned a total of \$3.88 million in revenue in 2023. The majority (87%) of Mississauga-based respondents to the *Hear and Now* Survey report their 2023 revenue to have grown from the previous year, with 69% of those who experienced an increase reporting more than 10% growth. Furthermore, more than half (53%) of respondents predict their final 2024 revenue will be higher than 2023 levels, with one-quarter of those predicting growth of more than 10%.

The charts below show the proportion of Mississauga live music companies that experienced growth, no change, or decreases in revenue between 2022 and 2023, as well as the proportion of live music companies that predict growth, no change, and decreases in revenue between 2023 and 2024.

Figure 1: Change to 2023 Revenue over 2022

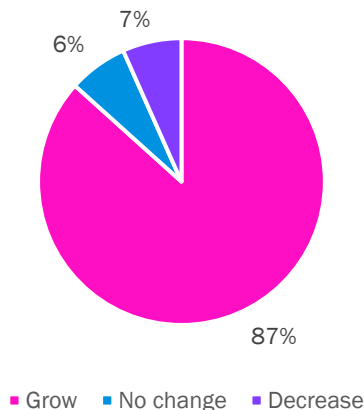
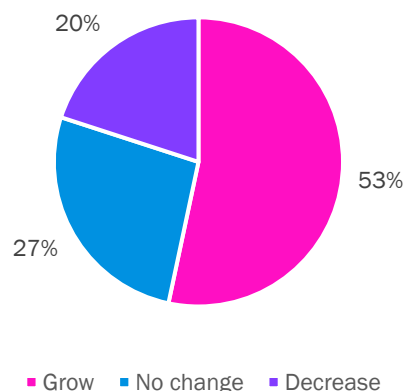


Figure 2: Predicted Change to 2024 Revenue over 2023



n=15

Source: Nordicity, *Hear and Now* Survey

The above statistics reflect a robust year of growth for most live music companies in Mississauga, and the prevalence of over 10% revenue growth cited between 2022 and 2023 suggests strong performance. The

widespread growth suggests that live music companies likely benefited from favourable market conditions associated with post-pandemic recovery (including increased demand for live music activity).¹⁰

However, while over half predict continued growth in 2024, the expected scale is smaller, and 47% predict no change or a decrease in revenue (as seen above in Figure 2). These tempered expectations for the future may reflect more cautious or realistic planning considering potential market challenges, likely a result of a maturing recovery phase. The moderation in expected revenue growth may also indicate uncertainties associated with economic headwinds, like inflation or interest rate pressures,¹¹ and industry-specific challenges like increased competition as other proximate live music markets (including Toronto and Hamilton) also recovered.

Expenses

Nordicity estimates that live music companies in Mississauga spent \$1.40 million in 2023. The largest share of live music company expenses in 2023 went to employee labour and programming costs, followed by marketing, professional services, and rent. The table below provides a breakdown of the estimated distribution of expenses.

Table 3: Breakdown of Expenses, 2023

Category	Expense
Canada-based labour (including full time, part time, and freelance/contract)	\$370,367
Rent	\$108,650
Utilities	\$8,200
Marketing	\$196,117
Travel	\$73,868
Accommodation	\$42,708
Insurance	\$31,365
Tech rental (e.g. lighting, sound equipment)	\$27,948
Licensing (e.g. SOCAN)	\$10,250
Ticketing	\$10,933
Bar and restaurant costs	\$14,008
Artist development	\$20,500

¹⁰ CTV News. 2024. [“A swift rebound and unprecedented tickets sales for live music after pandemic shut venues down.”](#)

¹¹ StatCan. 2024. [“Nearly half of Canadians report that rising prices are greatly impacting their ability to meet day-to-day expenses.”](#)

Programming costs (e.g., artistic fees)	\$235,750
Event costs	\$35,533
Professional services	\$116,987
Other expenses	\$97,648

Source: Nordicity, Hear and Now survey

This distribution of expenses, with significant concentration in labour and artist fees, highlights the importance of the labour force in Mississauga's live music industry. Such significant investment in labour indicates that skilled and knowledgeable live music workers are central to sustaining the industry, and this trend is consistent with the broader national live music industry.¹² Skilled personnel are essential in the execution of live music offerings, and for sustaining the availability of services in the local industry. Without sufficient human resources, Mississauga's live music industry would struggle to maintain the standards that audiences and customers expect.

The high proportion of expenses dedicated to marketing is likely reflective of the industry's reliance on audiences (i.e., more advertising = more ticket sales). It also highlights an opportunity for affordable Mississauga-centric live music-friendly marketing options.

Labour

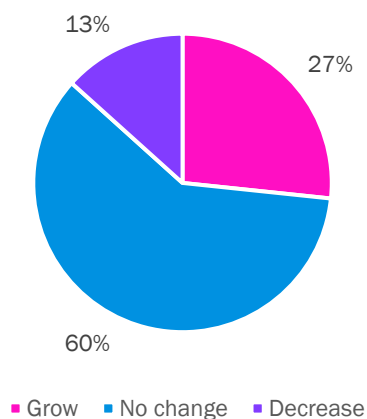
As discussed above, labour and programming combined represent the largest item in Mississauga's live music business expenditures (as is the standard in Canada's live music sector). The average salary for a live music worker in Mississauga in 2023 is approximately \$25,000, which is lower than the estimated national average for live music workers (\$31,000). The average Canadian income in 2022 was \$57,100 with a median income of \$43,100,¹³ both of which are higher than the estimated average salary for a worker in Mississauga's live music industry.

Well over one-half (60%) of Mississauga live music companies indicate no expected change in headcount from 2023 levels, and just over one-quarter (27%) expect their headcount to increase. The chart below provides a visual representation of how companies expect final 2024 headcount to differ from 2023.

¹² Canadian Live Music Association (CLMA) and Nordicity. 2024. "Hear and Now: Impacts of the Live Music Industry in Canada."

¹³ Statistics Canada. 2024. ["Income of individuals by age group, sex and income source, Canada, provinces and selected census metropolitan areas."](#)

Figure 3: Predicted Change to 2024 Headcount over 2023



n=15

Source: Nordicity, Hear and Now survey

Compared to the national live music industry's labour forecasts (which indicate 54% expect no headcount change and 35% expect headcount to increase),¹⁴ the above figures indicate that Mississauga's live music labour force might be growing at a slower rate than Canada's as a whole. As discussed above, labour and human resources are the heartbeat of the live music industry, and stagnating labour force growth may lead to stagnating industry growth more generally. This finding, in turn, signals the need for targeted, strategic live music supports to ensure that companies are able to continue hiring skilled workers and paying performing artists, thereby driving local live music activity and its related economic, tourism, and social impacts.

¹⁴ Canadian Live Music Association (CLMA) and Nordicity. 2024. "Hear and Now: Impacts of the Live Music Industry in Canada."



Photo by Adam Pulicicchio

3. Impacts of Live Music in Mississauga

The live music industry offers Mississauga far more than entertainment; it serves as a key driver of economic and social activity. It creates employment opportunities across a diverse range of roles, including musicians, venue staff, event organizers, technicians, crews, and hospitality workers such as food and bar staff. Beyond primary employment, live music attracts tourists who contribute to the local economy by staying in hotels, dining at restaurants, and purchasing goods and services. Additionally, live music is a cornerstone of Mississauga's nighttime economy, drawing residents out of their homes and fostering a lively, vibrant community atmosphere fueled by the presence of artists and venues.

Live music activity in Mississauga generates economic impacts that can be expressed in terms of gross domestic product, labour income, employment, and fiscal impacts (e.g., taxes). These impacts come from expenditures related to live music company operations and tourism, and they are composed of direct, indirect and induced impacts.

Gross domestic product (GDP) is a key economic indicator that represents the total monetary value of all goods and services produced within a country, and the activities of industries and organizations to produce goods and services contribute to a jurisdiction's GDP. **Labour** income is defined as total earnings or income received by workers as a result of a specific economic activity. **Employment** is expressed in terms of full-time equivalent jobs (FTEs), where an FTE is defined as someone who works a 40-hour work week, approximately 52 weeks per year. Importantly, employment impact is not a measure of the number of people employed – therefore, the number of FTEs is not necessarily a measure of headcount. **Fiscal impact** is the sum of estimated personal income taxes, corporation income taxes, consumption taxes,

property taxes, and other fees; fiscal impacts are expressed at the federal and provincial, levels, and total fiscal impact is the sum of the above.

The main source of **direct economic impact** in any economy is money paid to or generated by individuals. As such, the direct impact contributed by any entity comes from salaries and wages paid to employees, as well as any profits it earns from its operations. In addition to the direct impact, economic activity also has two key types of **ripple effects** on the broader economy. These include **indirect impacts**, which are generated within the supply chain as businesses purchase goods and services to support their operations; and **induced impacts**, which are generated by workers (i.e., those who have earned income at the direct and indirect impact stages) spending their wages on everyday goods and services. The sum of the direct, indirect, and induced economic impacts is the **total economic impact**.

Live music company operations and tourism spending related to live music contributed the following economic and fiscal impacts in Mississauga in 2023:

Table 4: Summary of Economic Impacts in Mississauga in 2023

Category	Live Music Operations	Tourism	Total Impact (Operations + Tourism)
Employment (FTEs)	40	250	290
Labour Income	\$1,032,000	\$13,662,000	\$14,694,000
Gross Domestic Product	\$3,958,000	\$24,026,000	\$27,984,000
Fiscal	\$1,001,000	\$9,855,000	\$10,856,000

Source: Nordicity, Hear and Now survey

Note: figures may not sum exactly due to rounding.

The subsections below detail the economic and fiscal impacts of live music company operations and tourism.

3.1. Economic Impacts – Live Music Operations

The operation of live music companies plays a pivotal role in driving economic activity in Mississauga. Live music companies in the city generate impacts at direct, indirect, and induced levels. These economic impacts are summarized in the table below.

Table 5: Economic Impacts of Mississauga Live Music Company Operations, 2023

Category	Direct Impact	Indirect Impact	Induced Impact	Total Impact
Employment (FTEs)	20	10	10	40
Labour Income	370,000	404,000	310,000	1,084,000

Gross Domestic Product	2,851,000	663,000	647,000	4,161,000
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Source: MyEIA™

Live music operations also contribute fiscal impacts, as detailed in the table below.

Table 6: Fiscal Impacts of Mississauga Live Music Company Operations, 2023

Tax	Federal (\$)	Provincial (\$)	Total (\$)
Personal Income Taxes	158,000	99,000	257,000
Corporation Income Taxes	178,000	205,000	383,000
Consumption Taxes	96,000	168,000	264,000
Local Property Taxes and Other Fees	0	149,000	149,000
Total	432,000	621,000	1,053,000

Source: MyEIA™

These figures set an important benchmark for live music in Mississauga, one that the City can use to gauge future growth in the local industry. The sector's existing presence serves as a foundation upon which to build greater economic and cultural vibrancy, and there is much opportunity for growth and development. By aligning local live music initiatives to the goals set forth in the Mississauga Music Strategy, the City can amplify the industry's impact and position Mississauga as an emerging hub within the broader Ontario live music ecosystem.

3.2. Economic Impacts – Tourism

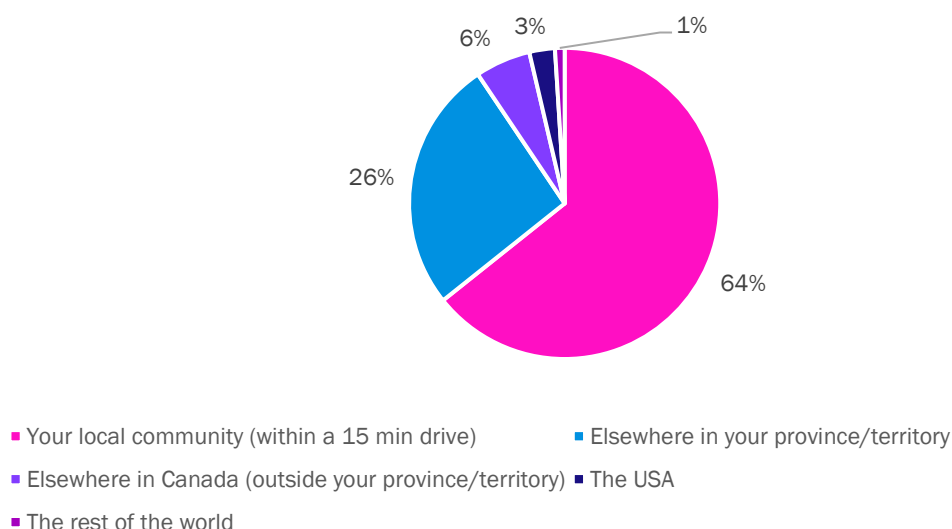
Live music as an industry is significantly linked with tourism. Indeed, live music tourism involves travel motivated by the desire to experience music-related activities, and this form of tourism drives significant economic impacts by attracting visitors who spend money on admission, food and beverage, transportation, and other local attractions. The direct and ripple effects of this spending contribute to the cultural vitality of the Mississauga community while also helping to enhance its cultural profile.

At the national level, the majority (64%) of people who attend live music events do so within their local community, and 36% travel from outside of their local community. Of the 36% who travel to live music events, the majority travel within their own province or territory. Overall, an estimated 4% of attendees at live music events in Canada travelled internationally to do so, and 6% travel interprovincially.¹⁵

¹⁵ "Canadian Live Music Association (CLMA) and Nordicity. 2024. Hear and Now: Impacts of the Live Music Industry in Canada."

The chart below provides a summary of where live music event attendees travel from.

Figure 4: Origin of Attendees for Canadian Live Music Events



n=182

Source: Nordicity, *Hear and Now* Survey

In 2023, it is estimated that live music events in Mississauga saw more than 50,000 non-local visitors. Using statistics from the Ontario Arts and Culture Tourism Profile (which is informed by the National Travel Survey, the Visitor Tourism Survey, and the National Tourism Indicators), visitor spending associated with live music in Mississauga in 2023 is an estimated \$32.8 million, or approximately 0.9% of Ontario's total arts and culture tourism expenditures for the year. The economic impacts of this tourism spending are significant, and are detailed in the table below.

Table 7: Economic Impacts of Tourism Spending in Mississauga Associated with Live Music, 2023

Category	Direct Impact	Indirect Impact	Induced Impact	Total Impact
Employment (FTEs)	150	60	40	250
Labour Income	\$6,824,000	\$4,211,000	\$2,627,000	\$13,662,000
Gross Domestic Product	\$10,425,000	\$8,123,000	\$5,478,000	\$24,026,000

Source: Customized Tourism MyEIA™ Model

Live music related tourism spending in Mississauga also contributed fiscal impacts in the form of various taxes and fees, as summarized in the table below.

Table 8: Fiscal Impacts of Tourism Spending in Mississauga Associated with Live Music, 2023

Tax	Federal (\$)	Provincial (\$)	Total (\$)
Personal Income Taxes	\$1,994,000	\$1,245,000	\$3,239,000



Corporation Income Taxes	\$600,000	\$690,000	\$1,290,000
Consumption Taxes	\$2,367,000	\$2,101,000	\$4,468,000
Local Property Taxes and Other Fees	0	\$858,000	\$858,000
Total	\$4,961,000	\$4,894,000	\$9,855,000

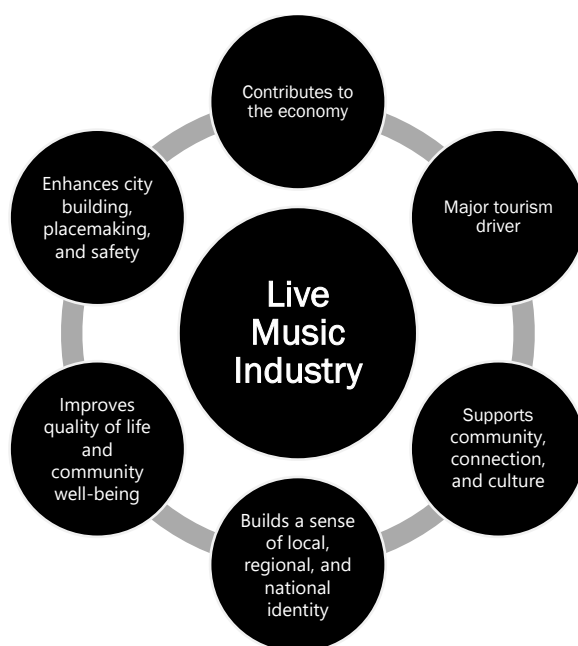
Source: Customized Tourism MyEIA™ Model

The World Travel and Tourism Council is forecasting historically high tourism industry activity for 2024.¹⁶ Given that Mississauga live music companies expect their 2024 to be higher than 2023, this finding suggests that 2024 tourism spending related to live music may also be higher. As a result, the economic impacts from tourism related to live music is also expected to be higher in 2024.

3.3. Social Benefits

The benefits of live music reach well beyond its economic impact. A vibrant live music sector offers several additional social benefits, which are effectively illustrated in the Mississauga Music Strategy through local analysis and case studies of other prominent live music markets – such as Nashville, Austin, and Toronto.¹⁷

Figure 5: The Social Benefits of Live Music



The Mississauga Music Strategy outlines how live music can serve as a powerful cultural and social force by connecting people and communities, transcending language and cultural barriers, and fostering shared

¹⁶ World Travel and Tourism Council. 2024. "Travel & Tourism set to Break All Records in 2024, reveals WTTC."

¹⁷ City of Mississauga. 2022. "Mississauga Music Strategy." Page 10-14.

experiences. As a highly diverse city,¹⁸ Mississauga is uniquely positioned to harness the **cultural impact of music**. Events such as the Bollywood Monster Mashup, Canada's largest South Asian festival, demonstrate the unifying power of music in celebrating heritage and promoting cross-cultural understanding. Music also plays a crucial role in storytelling, preserving traditions, and passing down cultural narratives across generations, reinforcing its importance as a driver of **social cohesion and community identity**.

A vibrant live music scene also enhances Mississauga's appeal as a **creative and dynamic city**. Through longstanding efforts, music can become a defining element of a **city's brand and reputation** and contribute to a sense of place. Similarly, Mississauga's music assets and talented local artists can serve as a cornerstone of its identity, appealing to residents, visitors, and potential newcomers. Live music strengthens the city's **nighttime economy** by attracting more people to the city's core, which in turn supports goals related to **city building and public safety**, as well as growing the customer base for other core businesses such as restaurants and retail stores. This vibrancy contributes to Mississauga's **attractiveness as a place to live and work**, particularly for skilled professionals seeking to live in a market with rich, fun creative and cultural experiences. By investing in its live music ecosystem, Mississauga can continue to build its reputation as a creative hub that supports talent attraction and retention, community involvement, and cultural enrichment.

3.4. The Role of Live Music within the Music Ecosystem

In addition to the above impacts, live music is becoming increasingly important within the broader music ecosystem. For one, live music is the key source of meaningful income for artists, given small returns generated from streaming platforms.¹⁹ In addition, live music plays an important role in artist development, in the following ways:

- **The Importance of a Venue Ladder for Artist Growth:** Diverse venues that cater to various genres and audiences are critical for any robust music industry. Starting out in small venues like bars and cafés allows artists to build a loyal, local fanbase. As an artist progresses in their career, they ideally move up the rungs of the ladder, playing larger venues such as theatres and potentially amphitheaters. Venues are an essential component of not just live music, but the entire music ecosystem as a whole. Without them, artists would not have opportunities to perform, grow audiences, and hone their craft.
- **The Role of Music Festivals in Supporting Emerging Artists:** Music festivals provide a platform for artists – new and old – to play to a sizeable audience. For emerging artists in particular, festivals form a critical steppingstone in advancing careers. By performing at festivals, these artists can gain exposure and grow their following, and often have the chance to play alongside established acts. The exposure offered by festivals can help artists gain more industry attention and open doorways to an expanded network in the industry.

¹⁸ City of Mississauga. N.d. "Equity, Diversity and Inclusion."

¹⁹ Nordicity. 2023. "The Digital Media Universe: Measuring the Revenues, the Audiences, and the Future Prospects."



Photo by Adam Pulicchio

4. Where Mississauga Goes from Here: Areas of Opportunity and Need

Mississauga's live music industry holds significant potential. If supported through beneficial policies and initiatives, Mississauga could unlock even greater economic, tourism, and social benefits through live music. Realizing this potential requires addressing key needs and opportunities apparent in the industry. These needs and opportunities emerged through **Hear and Now** industry roundtables, and resonate with the priorities laid out related to live music in the Mississauga Music Strategy.²⁰

4.1. Supporting Places to Play

Having various types of venues and spaces to rehearse and perform is critical to any thriving music industry. Without venues, there are no spaces for live music to take place, and without spaces to rehearse, artists cannot hone and refine their craft. Across Canada, there is a current shortage of venues in part

²⁰ City of Mississauga. 2022. [Mississauga Music Strategy](#).

spurred on by the pandemic, but not entirely. For instance, Toronto was already experiencing roughly one venue closure per month between 2017–2019.²¹

In Mississauga, industry roundtable participants note that there are only a handful of music venues, and most of these tend to be restaurants and bars. As a comparison, Hamilton has over 100 music venues and spaces, and is ranked seventh among cities worldwide for number of venues per capita.²² Moreover, industry roundtable participants note a need for mid-sized venues (500–1500 capacity) – a fact that it is echoed in the Mississauga Music Strategy. Overall, Mississauga does not have a fully developed “venue ladder,” which is uncharacteristic of a music city.

To help grow live music in Mississauga, industry roundtable participants call for support to help the creation of more varied music-first spaces that would better support the growth of local talent, provide more job opportunities in live music, as well as promote and cater to the diversity of genres present in the city. While developing new venues takes time, in the interim, the City of Mississauga has been exploring ways of animating public spaces through funding concert presenters, as well as expanding busking and other performance opportunities to help increase inclusive spaces for live music.

Relevant Recommendations from the Mississauga Music Strategy:

1. Increase the number and frequency of live music events in Mississauga.
2. Create a regulatory environment in which music venues can thrive.
4. Make City-owned spaces more affordable for the music community.
9. Foster safe and inclusive music events.

4.2. Growing a Reputation (and Audiences)

There is opportunity to grow Mississauga’s reputation as a music hub – a priority that is indicated in the Mississauga Music Strategy. The city’s proximity to Toronto – a central hub for live music in Ontario and in Canada as a whole – has presented an ongoing challenge for Mississauga. In addition to many Mississauga artists choosing to identify as Toronto-born, some have moved to Toronto in search of greater opportunity. Moreover, radius clauses – provisions established by venues and promoters preventing artist from performing at nearby venues for a certain length of time – can present a challenge in securing acts and developing Mississauga’s live music scene. Not only is Mississauga often subject to radius clauses from neighbouring Toronto venues, but also venues in other Greater Toronto Area (GTA) cities. Despite these challenges, Mississauga is seeing a shift in perception, with more artists embracing their Mississauga roots, which could help keep talent in the city. Furthermore, there are opportunities to mitigate the

²¹ City of Toronto. 2022. [Music Industry Strategy: 2022-2026](#).

²² City of Hamilton & MDB Insights. 2018. [City of Hamilton Creative Industries Sector Profile Study](#).

challenge of radius clauses, for instance by pursuing mutual agreements or partnerships with surrounding event venues, and developing partnerships with other cities that might fall outside the radius of most clauses (e.g., Kingston, Ottawa, Niagara, London).

With a burgeoning cultural corridor located in the city centre, and three hotspots of live music activity (City Centre, Port Credit, Streetsville), there is a growing sense of pride in Mississauga. Industry roundtable participants also applaud the efforts of Visit Mississauga, which sponsors several festivals, in promoting and championing local live music.

While Mississauga often feels to be in Toronto's shadow, this proximity is not always viewed negatively. For instance, Mississauga musicians and live music workers can readily access performance and work opportunities in Toronto. As another example, industry roundtable participants note that Mississauga tends to draw audiences from and focus promotional efforts in Toronto, leveraging Toronto's more robust media ecosystem. Promotion, otherwise, is a challenge in Mississauga as noted by roundtable participants and as reflected in the Mississauga Music Strategy. Increased promotion could attract more audiences to local live events and venues, supporting greater sustainability and helping to grow the fanbase for local talent. Additionally, there is a call in the local industry to see more targeted awareness-building of the diverse genres present in Mississauga, like the city's reggaeton, hip hop, and afrobeat scenes.

Relevant Recommendations from the Mississauga Music Strategy:

- 5. Encourage and empower Mississauga businesses to support local music.
- 6. Celebrate and commemorate Mississauga's music history.
- 7. Enhance promotion of Mississauga's music sector.
- 11. Build connections across Mississauga's creative industries.

4.3. Strengthening Grassroots Infrastructure

As previously mentioned, Mississauga's live music infrastructure is still evolving. However, the city's greatest strength lies in its close-knit community of advocates and industry champions, who continue to drive efforts to grow the local live music scene.

At present, Mississauga's existence of key supports, like Mississauga Music, are initiatives spearheaded by the community and many run on a volunteer basis. As Mississauga's live music industry continues to evolve, there will be a need to ensure the continued sustainability of these structures, and support the entrepreneurial spirit of new advocates and industry champions.

Relevant Recommendations from the Mississauga Music Strategy:

- 8. Create musical pathways for youth.

12. Take advantage of local industry expertise.

13. Support music entrepreneurs looking to grow their business in Mississauga.

4.4. Addressing Financial Pressures

The live music industry across Canada faces a variety of financial pressures that are reshaping its landscape and creating new challenges. These financial pressures are also being experienced by Mississauga artists, organizations, and businesses. With the right policies and initiatives in place, Mississauga could see a greater economic return from live music.

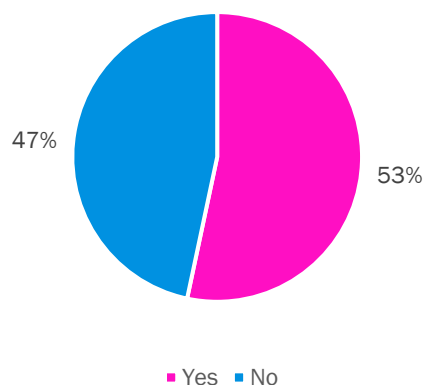
The rise in cost of living is making it increasingly difficult for artists and live music workers to maintain a career, and industry roundtable participants note that many are leaving the city to settle in lower cost of living areas. The industry is also dealing with rising operational costs and stagnating public revenues, all the while festivals and events are still recovering from financial deficits caused by the pandemic.

Industry roundtable participants note that declining support from corporate sponsorships and philanthropy is making recovery even more difficult. Corporate sponsorships are subject to shifting corporate priorities; before the pandemic, many Mississauga organizations and businesses were tapping into support from Scotiabank for example, but that is no longer the case. Moreover, many music festivals and venues rely on alcohol sales as a key source of revenue, but that is being challenged with younger audiences drinking less.²³ Overall, these financial difficulties present an obstacle to growing a thriving live music scene.

Grant funding is an important source of income for many Mississauga music companies and organizations. According to **Hear and Now** survey data, over half of respondents (53%) received grant funding in 2023 (see Figure 6). For these companies and organizations, grants comprise nearly half (45%) of their revenue.

²³ Forbes. 2023. [“Why GenZ Is Drinking Less and What This Means for the Alcohol Industry.”](#)

Figure 6: Portion of Mississauga Companies and Organizations Receiving Grants, 2023



n=15

Source: Nordicity, *Hear and Now* survey

Mississauga artists, music organizations, and businesses can tap into a wide array of federal and provincial grants including from FACTOR, Musicaction, the Canada Council for the Arts, Ontario Creates, and the Ontario Arts Council. The vast majority of respondents listed “municipal government” and/or “municipal arts council” as main sources of grant income, illustrating the importance of local supports. As an important pillar of local funding, the Mississauga Arts Council continues to look for new partnerships to increase the pool of funds available. At present, the Mississauga Arts Council provides two matchmaking grants for artist-led projects.²⁴ Additionally, the City of Mississauga offers a Live Music Grant to offset eligible costs for for-profit concert presenters featuring a minimum of 50% of Mississauga-based musicians.

Industry roundtable participants note a need for policies to help support compensation in the industry, such as establishing a Basic Income, to counteract the rising cost of living and retain artists and live music workers in Mississauga. Although such an initiative would fall under national jurisdiction, it would have trickle down effects for Mississauga. Ireland recently launched a pilot of its own Basic Income for the Arts in 2022, providing €325 per week to 2,000 eligible artists and creative arts workers. This program has been granted €35 million as of Ireland’s 2025 budget to continue past the pilot phase and is illustrative of an effective model.

Relevant Recommendations from the Mississauga Music Strategy:

3. Help create employment opportunities for Mississauga musicians.

²⁴ Mississauga Arts Council. N.d. “[MAC Microgrants](#).”

4.5. Developing Talent & Artist Discovery

Industry roundtable participants note a need to support the development of local talent in Mississauga and increase their chance of discovery. Where climbing the venue ladder once served as the only way of building a following and reaching success, shifts towards online discovery through platforms like Instagram and TikTok are changing the landscape.

Venues in Mississauga note using social media as a discovery tool to help them parse through the number of portfolios received in a day. However, presenting new, emerging talent can come at a risk for venues, and with mounting financial pressures, many may not readily be inclined to take on such risks. As such, there is a call in the industry to help encourage investment in and showcasing emerging talent.

Moreover, industry roundtable participants note a need for more business skill development across the sector. Increasing awareness of and access to various workshops, mentorships, and professional development opportunities would empower artists and aspiring live music workers to effectively pitch themselves and foster more entrepreneurship in the industry. Many such programs do exist within Ontario, and in Mississauga in particular. For instance, the City of Mississauga established an incubator program called Love Local Music in conjunction with Canada's Music Incubator, providing skill-building workshops and industry mentorship to a select number of aspiring professionals.²⁵

Relevant Recommendations from the Mississauga Music Strategy:

8. Create musical pathways for youth.

13. Support music entrepreneurs looking to grow their business in Mississauga.

²⁵ City of Mississauga. 2022. "[Are You a Musician Looking to Take Things to the Next Level?](#)"



Photo by Adam Pulicichio

5. Conclusion

Mississauga's live music sector delivers substantial economic benefits, contributing to the city's economy through both direct operations and associated tourism. The sector supports an estimated **290 full-time equivalent (FTE) jobs**, generating an estimated **\$14.7 million in labour income**. Additionally, the sector adds an estimated **\$28 million to Mississauga's GDP**, with a total **tax revenue impact of \$10.9 million**, including a **property tax impact of approximately \$1 million**.

These economic impacts would not be possible without Mississauga's **dynamic and diverse live music scene** that reflects the city's rich multicultural identity. With festivals such as Carassauga and Southside Shuffle and a range of venues, from major City-owned spaces like the Living Arts Centre and Celebration Square to the locally-owned venues along Port Credit, **Mississauga punches above its weight in live music activity**. The city enjoys a higher-than-average share of musicians among its professional artists and a thriving ecosystem of festivals, venues, and community-driven initiatives.

As a **strong incubator for artists and live music workers**, Mississauga fosters talent through institutions such as Metalworks, and has a track record of producing internationally recognized artists, including Billy Talent, PARTYNEXTDOOR, among several others. The city is **building a reputation as a music hub** with recent accolades like 2023 Music City of the Year and the hosting of the CMAOntario Festival and Folk Music Ontario. While Mississauga's sprawling geography presents challenges for cohesion, areas such as City Centre, Port Credit, and Streetsville have established themselves as key hotspots for live music.

The city's cultural dynamism, diverse talent pool, and strategic growth efforts position it as an emerging leader in Ontario's music landscape. A thriving live music sector leads to more jobs and more opportunities

for artists to develop audiences and advance their careers, while also unlocking greater economic, tourism and cultural impacts for Mississauga.

Appendix: Summary of Live Music Assets

A total of **111 live music-related assets** were identified through this study. These numbers are subject to changes over time as Mississauga's live music sector evolves, and will need to be continually revisited and updated. An interactive map of Mississauga's live music sector is [available on Tableau](#).

Table 9: Number of Live Music Assets in Mississauga

Category	Sub-Categories Included	Total
Venues	Core Live Music Venues	29
	Occasional Live Music Venues	
Professional Services	Live Music Promoters	43
	Live Music Recording or Rehearsal Spaces	
	Live Music Managers/Agents	
	Live Music Production	
	Live Music Equipment Rentals and Supplies	
	Live Music Support Organizations	
Professional Organizations	Artist Entrepreneurs	20
	Choirs	
	Orchestras	
Showcase and Celebration	Music Festivals and Events	19
	Indigenous Live Music	
	Cultural Festivals with Live Music	
	Award Shows	

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Hear and Now:

Understanding the economic power and
potential of Canada's live music industry

Acknowledgements

The Canadian Live Music Association (CLMA) and Nordicity would like to extend our thanks to all of our industry sponsors for making this project possible.

We extend our thanks to all of our industry sponsors for making this project possible: RBC Foundation, Live Nation, Ticketmaster, City of Mississauga, Music Canada, evenko, MLSE, City of Brampton, Stageline, Blueprint, Tourism Industry Association of Ontario, London Music Office, City of Hamilton, Lula Lounge, Market Hall Performing Arts Centre, and City of Toronto.

Special thanks to our top tier sponsors:

RBC Foundation, Live Nation, Ticketmaster, City of Mississauga, Music Canada, City of Brampton, evenko, Maple Leaf Sports & Entertainment, and Stageline.

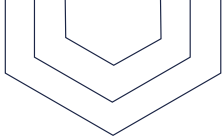


The project team would also like to thank all those who took time to contribute to the findings in this report, whether by taking time to fill in the **Hear and Now** national survey and/or participating in our series of roundtables. Your thoughts and insights were invaluable to shaping the contents of this report and in capturing a snapshot of live music in Canada.

This project is supported by the Canada Council for the Arts, Ontario Creates, Creative BC and the Province of British Columbia.



Any opinions, findings, conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of the Canada Council for the Arts, Ontario Creates or the Government of Ontario, and Creative BC or the Province of BC. The funders and its agencies are in no way bound by the recommendations contained in this document.



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We extend special thanks to our cohort of community connectors, whose invaluable collaboration and advisory support were key in engaging communities across Canada and ensuring the study reflects and serves Canada's vibrant and diverse live music sector.

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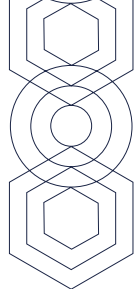
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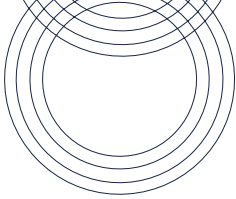


The Canadian Live Music Association (CLMA) aims to establish the economic, cultural, and social importance of live music while fostering an environment where concerts can flourish. Through advocacy focused on policy development, funding, public awareness, and research, the association unites and amplifies the efforts of the live music industry, believing that collective action strengthens their voice. Its membership includes a diverse range of stakeholders, such as concert promoters, festivals, talent agencies, venues, clubs, arenas, performing arts centres, industry associations, networks, and suppliers.

Become a member today.



Nordicity is a leading international consulting firm that offers solutions in Economic Analysis, Strategy and Business Planning, Policy, and Regulation to private and public sector clients across three key areas: Arts, Culture & Heritage, Creative Industries, and Digital Economy & Innovation. Renowned for its expertise in designing methodologies to capture the social and economic benefits of arts and cultural activities, including cultural tourism, Nordicity has refined its approach to measuring the impact of the creative industries over decades.



Foreword

Ask any music fan about why live music matters, and they'll tell you. Yet for economists and policy makers, the value of the overall impact and importance of this vibrant Canadian industry has historically been overlooked.

It's time to change that.

"Hear and Now", the **first-ever** economic impact assessment of Canada's live music industry comes at a pivotal moment, as a recent global surge in interest begins to highlight and capitalize on the economic significance of live music that complements its well-known social and cultural value.

Why this, and why now? Because the potential of Canada's **live music infrastructure is ready** and waiting.

The small, medium, and large venues, clubs, concert halls, festivals, arenas, and other live music spaces that connect artists with their fans form a vast, complex, indoor and outdoor ecosystem. This is the system that facilitates live music—and its massive supply chain—across Canada, be it a national arena tour, or a one-off local show in a 120-cap independent venue...and everything in-between.

Understanding and harnessing this system creates a **significant and scalable competitive advantage** for Canadians and **for all levels of government**, and is essential for our artists so that they can continue to share the music we love and need. And why wouldn't we? This study is a benchmark, the numbers in it have been achieved largely in the absence of any dedicated fiscal policy frameworks aimed at incentivizing growth. **\$10.92B in combined impact from live music and tourism spending... without trying.**

Today? It's clear that **protecting and growing** Canada's live music infrastructure **directly results** in more jobs, major economic impact for cities and towns, and more performance opportunities for Canadian artists. It means more fans choosing Canada when deciding where to spend their (billions of, as it turns out) music tourism dollars. It means sold out hotels, fully booked flights, bustling shops, and restaurants. It means togetherness and social cohesion. It means better mental health. It means thriving downtowns. It means attracting and retaining other industries and talent to our cities. It means more revenue for artists and musicians. It means more music and memories with family and friends that change our lives.

The Canadian Live Music Association was founded in 2014 to drive the narrative of the power of live music, and to collaborate with members and government to **stimulate increased sector capacity across the ecosystem**. With this new data in hand, we hope the hard evidence and robust research in this report will incentivize forward and innovative thinking about **the industry's place and potential for growth within Canada's cultural and economic framework**, expanding the appreciation of the impact of existing (or non-existent, as the case may be), policies and practices.

Let **Hear and Now** be your gateway to a deeper understanding of one of Canada's most dynamic and influential cultural industries, to level-set and amplify **the power and impact of live music** for the benefit of artists, all Canadians, and music fans here at home, and around the world.

Tarun Nayar
Chair - Board of Directors,
Canadian Live Music Association

Co-Founder, 5X Festival; Co-Founder,
Snakes x Ladders; Artist

Erin Benjamin
President & CEO,
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Table of Contents

1

Executive Summary

5

Section I: Introduction

9

Section II: About Live Music

15

Section III: The Live Music Industry in Canada

36

Section IV: Impacts of Live Music

44

Section V: Strengths, Challenges, Trends, and Needs of Live Music in Canada

61

Section VI: Conclusion

63

Appendix

Canada’s live music industry is an economic powerhouse.

The Results Are In

In 2023 alone, the Canadian live music industry generated \$10.92 billion in gross domestic product (GDP) .	Live music in Canada produced \$3.73 billion in tax dollars
---	--

Live music also supported more than **101,640 jobs¹**, contributing **\$5.84 billion** in labour income across the country **(see Table 1)**.

These numbers highlight the immense economic impact of live music and its role in driving jobs, growth, and economic prosperity nationwide.

¹ Employment is expressed in terms of full-time equivalent jobs (FTEs), where an FTE is defined as someone who works a 40-hour work week, approximately 52 weeks per year. There are many individuals in the music industry who hold casual positions; multiple casual positions comprise 1 FTE.

TABLE 1:
Summary of Economic and Fiscal Impacts of Live Music, 2023

Category	Live Music Operations	Tourism	Total Impact (Operations + Tourism)
Employment (FTEs)	27,490	77,150	101,640
Labour Income	\$1.17 billion	\$4.67 billion	\$5.84 billion
Gross Domestic Product	\$2 billion	\$8.92 billion	\$10.92 billion
Fiscal (Taxes)	\$514 million	\$3.21 billion	\$3.73 billion

Note: Figures may not sum to total due to rounding.

The economic impact of Canada's live music industry can often rival that of other Canadian industries that receive considerably more recognition in national policy conversations. By way of comparison, Canada's fisheries industry generates 32,500 jobs and contributes approximately \$2.6 billion to GDP², while Canada's automotive industry generates approximately 125,000 direct jobs and contributes approximately \$14 billion to GDP.³

As the first study to assess the economic impact of live music in Canada, Hear and Now establishes a crucial benchmark for measuring the industry's potential and progress over time. Operating in an ever-evolving landscape, live music is becoming increasingly important and its potential for growth, along with the economic returns it generates, is clear.

It serves as a vital source of income for artists – especially as revenue from streaming services remains limited – supporting not just individual careers but the entire foundation of the music ecosystem.⁴ Additionally, the rise of immersive technologies including the use of video game platforms for live music events,⁵ and the boom in global music tourism, signals significant growth potential.⁶ While live music in Canada continues to navigate post-pandemic challenges and shifts in the landscape, these trends point to a thriving industry full of opportunity and ongoing growth.

2 Unifor. 2022. "[Fisheries Sector Profile](#)."

3 Canadian Vehicle Manufacturers' Association. 2023. "[State of the Canadian Automotive Industry](#)."

4 Nordicity. 2023. "[The Digital Media Universe: Measuring the Revenues, the Audiences, and the Future Prospects](#)."

5 Music Ally. 2024. "[Sony Music talks immersive tech: 'We are doing a lot of testing...'](#)"

6 Custom Market Insights. 2024. "[Global Music Tourism Market Size Likely to Surpass at a CAGR of 8.5% By 2023](#)."



(Rauw Alejandro at) Scotiabank Arena

Live music companies spent an estimated \$1.65 billion in 2023; the total GDP impact of this expenditure is an estimated \$2 billion.

According to Statistics Canada, the national contribution from all culture and sport in 2023 was \$60.8 billion, implying that live music operations contributed approximately 3.3% of Canada's culture and sport GDP impact."

A Snapshot of Live Music in Canada

Canada's live music industry is vast and varied.

Canada is home to more than **3,750 (and counting)** venues, music festivals and events, promoters, rehearsal spaces, managers and agents, live music production companies, equipment rental companies, support organizations, cultural festivals, showcases, and award shows.⁷ This number continues to shift by day as the industry constantly evolves. Live music venues, festivals, events, and award shows in particular play an integral role in the country's live music industry. Not only are they the industry's core source of job creation, but they also are critical for artist development. By playing to live audiences, artists grow their fanbase and following, and expand their reach into new markets. The collaborative relationships between people across the whole music ecosystem – from venue staff and promoters to managers and agents – are also critical artists' success.

7 For more details, please see the live music industry asset map provided in 3.1: Profile of Live Music in Canada.

Toronto Jazz Festival by Jesse Milns



Live music in Canada is highly active, and is continuing to evolve, mature, and diversify.

Hear and Now survey results show that Canadian concert bookers and promoters booked an estimated **18,945 live music shows** in Canada in 2023 – that figure conservatively translates to **50 shows per day across the country**. While activity tends to be concentrated in densely populated areas, live music is unique in that it spans both urban and rural communities alike. It also nurtures the next wave of Canadian artists while also celebrating local stars, with artists serving as a source of community pride and contributing to Canada's reputation as a global music tourism destination.

According to results from the survey, more than half of company owners and leaders identify as women. Additionally, roughly a third of company owners and leaders identify as members of the 2SLGBTQ+ community. While these survey results are not inclusive of all companies in the industry, this data suggests positive strides are being made in gender representation. However, these advancements may not be equally inclusive of IBPOC communities. For instance, approximately 21% of women company owners and 24% of women company leaders that responded to the survey identify as Indigenous, Black, or a Person of Colour. Fully assessing the diversity of the industry would require further exploration, as is being done by organizations such as ADVANCE Canada's Black Music Business Collective, Women in

Music Canada, Breaking Down Racial Barriers (BDRB), and the recently formed Indigenous Music Office, along side the ongoing work of CLMA.

In 2022, CLMA produced a report called Closing the Gap that examined the challenges confronted by by Indigenous, Black, and other racialized individuals working in Canada's live music industry. The report included actionable policy recommendations that CLMA continues to advocate for on behalf of the industry.⁸ Supporting the conditions for a more diverse industry not only brings about richer, more dynamic live music in Canada, but has been shown to drive innovation, leading to stronger financial performance and greater economic returns.⁹

Live music is vital to Canada's social fabric.

Beyond its significant economic contributions, live music is a core tourism driver and brings people together, fostering opportunities for connection around a shared cultural experience. Across Canada, live music helps build a sense of local, regional, and national pride and identity through homegrown talent and cornerstone music venues. It also improves the quality of life and well-being for all Canadians, and enhances city building, placemaking, and safety by transforming public spaces into vibrant culture hubs.

⁸ CLMA. 2022. "[Closing the Gap: Impact & Representation of Indigenous, Black, and People of Colour Live Music Workers in Canada.](#)"

⁹ McKinsey. 2020. "[Diversity wins. How inclusion matters.](#)"

*Canadian concert bookers
and promoters booked
an estimated 18,945 live
music shows in Canada
in 2023 – that figure
conservatively translates
to 50 shows per day
across the country*

Calls to Action

To help Canada's live music industry realize its growth potential and continue making significant economic contributions, **Hear and Now** research has identified several key calls to action:

1.

Protect existing venues as the lifeline of the industry.

2.

Support risk-taking among venues & promoters with strategic initiatives.

3.

Engage the private sector through sponsorships, partnerships, & collaborations.

4.

Address & assess systemic barriers faced by IBPOC individuals & members of the 2SLGBTQ+ community.

5.

Attract, nurture, & retain talent in Canada's live music industry.

6.

Improve fair compensation and working conditions to attract & retain talent across the industry.

7.

Foster national connection and collaboration to tackle industry-wide challenges.

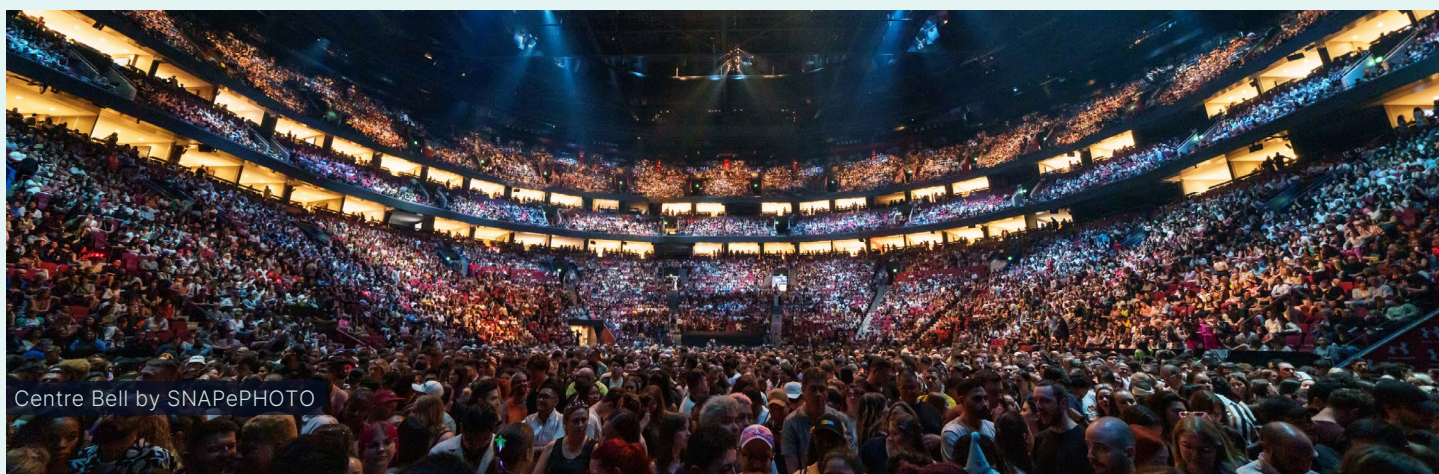
8.

Encourage innovative business models, including new revenue strategies and more robust contingency planning.

9.

Integrate live music more deeply into Canada's tourism initiatives, capitalizing on its potential to drive tourism and cultural engagement.

Acting on these areas will help support an environment where live music can flourish, generate more jobs and opportunities for artists to grow and expand their careers, and **unlock even greater economic potential for the benefit of all Canadians.**



Centre Bell by SNAPePHOTO



Section I:

INTRODUCTION

1.1 About this Project

As the first-ever economic impact assessment of the Canadian live music industry, this study comes at a critical moment in time.

The industry is operating in a rapidly evolving landscape and contending with many factors that could fundamentally shift the industry. There are increasing environmental concerns, acknowledgement of the need for more concerted efforts towards equity and inclusion, and uncertainty surrounding artificial intelligence – all the while the live music industry is still grappling with post-pandemic recovery. However, live music is becoming increasingly important and its potential for growth, along with the economic impact it generates, is clear. Not only does live music serve as artists' most meaningful source of income¹⁰, but trends such as the rise in global music tourism signals significant growth potential in the industry.¹¹

Until now, the economic contributions of live music across Canada have largely been unquantified. The research laid out in this report documents the direct, indirect, and induced economic impacts of the live music industry, including the tourism and fiscal impact of the industry at the national level. Beyond its economic footprint, this report provides a broad profile of live music in Canada and concludes in an exploration of the most pressing challenges and needs for live music to continue to thrive in Canada.

10 Nordicity. 2023. "[The Digital Media Universe: Measuring the Revenues, the Audiences, and the Future Prospects.](#)"

11 Custom Market Insights. 2024. "[Global Music Tourism Market Size Likely to Surpass at a CAGR of 8.5% By 2023.](#)"



The economic impact of Canada's live music industry can often rival that of other Canadian industries that receive considerably more recognition in national policy conversations. By way of comparison, Canada's fisheries industry generates 32,500 jobs and contributes approximately \$2.6 billion to GDP¹², while Canada's automotive industry generates approximately 125,000 direct jobs and contributes approximately \$14 billion to GDP.¹³

Live music is a powerful industry in Canada, and with further support and attention, it could deliver even stronger economic impact.

Why is this data useful?

The data will help the live music industry quantify its economic impacts and articulate the value the industry brings more broadly (e.g., social impacts). The data in this report will also help the industry identify and address current challenges and opportunities. The key objectives of Hear and Now are to:

- Advance awareness of the global competitiveness of the scope and importance of Canada's live music industry;
- Enable companies and organizations to make data-driven decisions;
- Illuminate trends, shifts, and challenges affecting the industry;
- Showcase areas of opportunity;
- Communicate the industry's value to other sectors to explore and amplify collaboration opportunities;
- Contribute to a global picture of live music.

12 Unifor. 2022. "[Fisheries Sector Profile.](#)"

13 Canadian Vehicle Manufacturers' Association. 2023. "[State of the Canadian Automotive Industry.](#)"



Dawson City Music Festival by John Howland

1.2 Summary of Methodology

Several research methods were employed to collect and analyze data for this report. These tools and techniques are explained below.

National Survey

The **Hear and Now** Survey was launched to the public on April 30, 2024, and closed on July 12, 2024, as the primary financial data collection tool for this project. In addition, the survey also gathered non-financial information to help inform analysis on the strengths and needs of the industry, as well as non-economic impacts (including social impacts). The survey was open to anyone across the country, and was shared widely through CLMA social and email channels. The survey was further promoted by a series of community partners with strong networks in regional and local music industries to ensure broad representation. A total of 387 completed responses were received, plus an additional 264 partial responses with usable data. For a full breakdown of survey respondents, please see Appendix A.

Half (50%) of the respondents were answering on behalf of a music business or performing arts organization; just over one-third (34%) were a self-managed artist, musician, performer, band, DJ, choir, or related; and 16% were freelancers in the music industry. The following chart shows the survey respondents broken out by respondent type.

Engagements

Supplementary to the national survey, a series of regional roundtables were held to gather qualitative findings about the industry. These roundtables were held across Canada, including with industry representatives from Ontario, Quebec, British Columbia, the Prairies, Atlantic Canada, and Northern Canada. Additionally, Nordicity held a number of key informant interviews with organizations that represent Indigenous and Black music communities, as well as environmental advocacy groups. A total of 9 regional roundtables and 11 interviews were held, involving roughly 54 participants in Canada.

Secondary Research

Primary research findings were validated through existing literature and secondary sources. For instance, reports from the International Federation of the Phonographic Industry (IFPI), **Closing the Gap**¹⁴, Statistics Canada, among others were examined and cited throughout this report.

¹⁴ CLMA. 2022. "[Closing the Gap: Impact & Representation of Indigenous, Black, and People of Colour Live Music Workers in Canada.](#)"



King Eddy by Sebastian Buzzalino

Economic Impact Assessments

The economic impacts of live music companies’ and organizations’ operations as well as tourism spending were estimated using primary data collected via the **Hear and Now** Survey, select secondary research sources, and two economic impact modeling tools. The tools used included Nordicity’s proprietary MyEIA™ model, and a customized tourism model informed by MyEIA™ informed by the Government of Ontario’s Tourism Regional Economic Impact Model. A summary of the data sources and analytical tools used are provided in the table below.

TABLE 2:
Summary of Data Sources and Tools

Impact Area	Data Sources and Analytical Tools Used
Live music company operations	Hear and Now Survey MyEIA™
Tourism spending and impacts	Hear and Now Survey National Travel Survey Visitor Tourism Survey National Tourism Indicators Customized tourism EIA™ model



Jessie Reyez at Calgary Stampede



Section II:

ABOUT LIVE MUSIC

“Live music” is defined as music played by an individual or group in front of a live audience.

Although the industry also encompasses many types of performances in many different settings and forms – whether intimate shows at cafés, bars, and parks, performances in concert halls and underground spaces, or massive stadium concerts – at its core, the emphasis on in-person settings is what makes the industry unique, distinguishing it from its recorded music counterpart.

For the purposes of this report, the various aspects of the live music industry were categorized as follows:

**TABLE 3:
Music Industry Categorization Framework**

Category	Sub-Category	Description/Examples
Venues	Core Live Music Venues	Dedicated live music venues such as concert halls, theatres, performing arts centres, and amphitheatres.
	Occasional Live Music Venues	Occasional live music venues such as bars, pubs, cafés, restaurants, clubs, convention centres, sports arenas, and banquet halls.
Professional Services	Live Music Promoters	Individuals or organizations that coordinate, market, and/or facilitate live music events.
	Live Music Recording or Rehearsal Spaces	Professional spaces such as recording studios and/or rehearsal studios to capture or record live music.
	Live Music Managers, Agents	Individuals or organizations that represent and support live music artists by handling activities such as bookings, negotiations, and career development.
	Live Music Production Companies	Individuals or organizations that produce and/or manage live music including sound engineering, stage design, and event coordination.
	Live Music Equipment Rentals	Businesses that supply musicians and event organizers with professional audio, lighting, staging, or instruments for live performance.
	Live Music Support Organizations	Live music support organizations such as industry associations or societies.
Professional Organizations	Artist Entrepreneurs	Those who run a business as an artist, musician, DJ, band, or related.
	Choirs	Community-based or organization-led choirs.
	Orchestras	Community-based or organization-led orchestras.
Showcase and Celebration	Music Festivals and Events	Festivals and events that showcase live music.
	Indigenous Live Music	Activities or events that include live music such as drumming, throat singing, and powwows.
	Cultural Festivals with Live Music	Festivals and events with live music as a component of the event, but not the main feature of the event.
	Awards Shows	Awards shows or ceremonies that acknowledge and celebrate the achievements of live music work and artists.

Live music contributes significantly to city building and placemaking activities by increasing a city or town's vibrancy, livability, and quality of life for its residents.

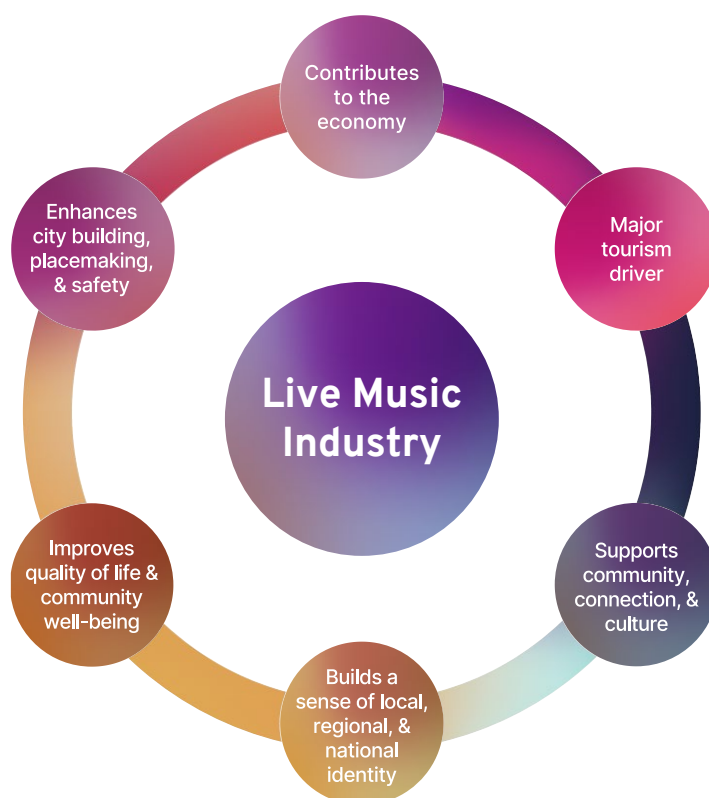
While there are several secondary industries that support live music, they are not included in the scope of this study. For instance, the transportation and hospitality industries play significant roles in facilitating live music events. Additionally, fields like music education and music therapy make use of components of live music. However, these secondary industries fall outside the focus of this study.

2.1 The Benefits of Live Music

The live music industry provides many benefits to society beyond entertainment. For one, the live industry is a powerful economic driver. It generates employment across a wide spectrum from musicians themselves to venue staff and event organizers, to technicians and crews, to food and bar staff, among others. Live music also attracts tourists who stay in hotels, eat in restaurants, buy local goods, and other services, stimulating local economies across the country. It is also a core driver of nighttime activity, whereby the presence of artists and venues brings people out of their homes and contributes to a bustling, vibrant nighttime economy. Moreover, music is a year-round activity, meaning the benefits of music tourism are not tied to a specific season and can extend to off-peak seasons. In further illustration of this point, a detailed breakdown of the economic and tourism impact of live music is provided in **Section 4: Impacts of Live Music**.

While important, the benefits of live music go beyond the economy and tourism. Live music offers a number of additional social benefits as described below.

FIGURE 1:
The Benefits of Live Music



Live music plays a critical role in fostering **community connections** and **cultural exchange**, creating a shared, collective experience. Venues in particular serve as key gathering places that bring people in a city together, helping to build a sense of community and belonging, especially for those from equity-deserving communities who may lack spaces to gather.¹⁵

As a key form of cultural expression, live music can also act as a gateway to opening minds and exposing people to new ideas and new cultures. In this way, live music contributes to greater **cultural exchange, awareness, and understanding** within a community. Moreover, live music is also inherently public facing. Witnessing diverse representation on stage – artists like Tanya Tagaq, k.d. lang, and Deborah Cox – can have a profound impact on inspiring future generations from historically underserved communities.

15 Nordicity. 2020. "[Re:Venues: A Case and Path Forward for Toronto's Live Music Industry](#)."

Additionally, live music can instill a sense of **pride and identity**. In a country as geographically spread out as Canada, well-known music acts, festivals, and events help build up local pride and strengthen a broader national reputation that excites and unites people.

Studies have also shown that music can also help alleviate depression, anxiety, and other mental health issues by activating the brain's pleasure receptors. Engaging in live music enables people to process emotions, recover from trauma, and connect with others. In other words, live music plays a vital role in **mental health and well-being**. Some doctors are recommending music-based interventions over traditional antidepressant medications.¹⁶ Moreover, live music can help counteract social isolation and loneliness, which affects one in four older adults, and 515% of young adolescents worldwide, as noted by the World Health Association.¹⁷

Live music also contributes significantly to **city building and placemaking activities** by increasing a city or town's **vibrancy, livability, and quality of life** for its residents. Cultural activity is an attractive feature that entices people to live and work in a given place. Live music can breathe life into public and cultural spaces, attracting highly skilled and educated individuals who, in turn, contribute to the local economy by launching businesses, creating jobs, and fostering innovation. Music districts and the clustering of music-related facilities, like live venues, foster cultural richness that attracts other creative professionals and industries, such as film, television, and live events. This cultural vibrancy enhances the city's appeal, offering both residents and visitors unique experiences that make it a desirable place to live.

Live music can also rejuvenate underdeveloped parts of a city, drawing more foot traffic to nearby businesses and spurring further commercial growth. Increased foot traffic enhances public safety, and this improvement can lead to more appealing neighborhoods that attract further artistic and cultural activities, along with additional residents, businesses, and investment.

¹⁶ BC Alliance For Arts + Culture. 2022. "[Arts on Prescription.](#)"

¹⁷ World Health Association. N.d. "[Social Isolation and Loneliness.](#)"

*Live music contributes
to greater cultural
exchange, awareness,
& understanding
within a community.*



Supercrawl by Mike Highfield

How Live Music Shapes Urban Vitality: *The Case of Hamilton, Montreal, and Nashville*



The City of Hamilton, Ontario has sought to rebrand itself from an industrial powerhouse to a “vibrant, creative destination.”¹⁸ Through efforts like the development of a Music Strategy and the introduction of live music-friendly policies, Hamilton has become a welcoming environment for music professionals and creatives in Canada.¹⁹ This attraction of talent has, in turn, contributed to the revitalization of its downtown. Hamilton ranks seventh worldwide in the highest number of independent music venues per capita.²⁰

In Quebec, Montreal also stands as a prime example of how live music spaces can enhance urban vibrancy. The Quartier des Spectacles – a culture hub and entertainment centre in the heart of the city – has helped to attract visitors and make the city a more vibrant place to live, work, and play. Many music events are held in the Quartier des Spectacles, including the renowned Montreal International Jazz Festival.

Dubbed the “Music City,” Nashville, Tennessee, has positioned its music industry as central to its identity and economy. Live music permeates the city, from the Grand Ole Opry to the many live music venues lining its historic Music Row. Faced with growth pressures that have put its live music assets at risk, governments have responded to protect those assets with policy measures like their new Tennessee Live Music Fund and site-specific development planning.²¹ These protective measures will help to ensure that Nashville’s live music ecosystem remains one of the city’s main calling cards for visitors and locals alike.

Municipalities across Canada are strategically supporting the growth of their music industries, having recognized the impacts the industry can have on communities. Mississauga was recognized as the CLMIA’s 2023 Music City of the Year for their work developing a Music Strategy²², to grow the city’s music industry and build up Mississauga as an “incubator for top musical talent and a national destination for live music events and festivals”.^{23 24}

18 Toronto Star. 2023. “[City of Hamilton is getting a new downtown landmark called The Design District.](#)”

19 City of Hamilton. 2023. “[Music in Hamilton.](#)”

20 City of Hamilton & MDB Insights. 2018. “[City of Hamilton Creative Industries Sector Profile Study.](#)”

21 Metropolitan Government of Nashville and Davidson County. N.d. “[Music Row Vision Plan](#)”; Billboard. 2024. “[Tennessee Bill That Would Create a Live Music Fund for Indie Venues Passes State Legislature.](#)”

22 City of Mississauga. 2022. [Mississauga Music Strategy 2022-2026](#).

23 City of Mississauga. 2023. “[Mississauga hits all the right notes as the 2023 Music City of the Year.](#)”

24 An Economic Impact Assessment of Live Music in Mississauga was subsequently developed in 2024, in parallel to this national study, to continue to advance the goals of the City’s Music Strategy.



Photo courtesy of Metalworks Institute



2.2 Live Music's Role in the Music Ecosystem

Live music forms a key part of the broader music value chain. While distinct from recorded music, it is nearly impossible for one to exist without the other. Listeners on platforms often translate to in-person audiences at live shows, and vice versa. Many engineers dabble in both recorded and live production. For an artist, live and recorded music form two inseparable parts of the ecosystem in terms of their earnings and audience development. Indeed, live music has become even more significant to the music ecosystem in recent years, becoming the primary source of income for most artists in the face of low earnings generated from streaming platforms.²⁵

The Importance of a Venue Ladder for Artist Growth

There are many elements of a robust live music industry, one of which includes having diverse venues that cater to various audiences, genres, and audience sizes. Venues serve as the backbone of the live music industry by providing a platform for artist discoverability and audience growth, and thus are a critical stepping stone in an artist's development.²⁶

As an artist grows over time, they ideally move up the rungs of the venue-ladder, starting out in small bars or cafés, to theatres, to one day amphitheatres and stadiums. Nevertheless, venues are essential for the sustainability of the live music industry and, by extension, the broader music industry as a whole.

The Role of Music Festivals in Supporting Emerging Artists

Music festivals in Canada are pivotal in helping emerging artists gain visibility and grow their careers. These events across the country (e.g., Montreal International Jazz Festival, 5X Fest, Winnipeg Folk Festival in Manitoba, Afrofest, RISE Edutainment) offer artists opportunities to perform in front of large audiences, connect with industry professionals, and access mentorship through panels and workshops.

Music festivals in Canada serve as vital stepping stones for emerging artists, helping them navigate the path to broader industry recognition. The benefits of increased exposure and access to industry networks are significant. Even artists who may not be selected for showcases can gain valuable connections through discounted registration for industry events and access to resources.

While many festivals feature showcases for new talent, such as Bow Valley Music Festival, some events like Departure Festival + Conference (formerly known as Canadian Music Week) and North by Northeast (NXNE) include industry-focused components that bring together artists, music executives, agents, and media outlets from across the country. Membership organizations like Folk Canada²⁷ also exist to provide workshops and panels that help foster connection and resource sharing for a stronger, united live industry. These events function as centralized hubs for networking, fostering an ecosystem where artists can perform, learn, and engage with key industry players, ultimately paving the way for new talent to thrive.

25 Nordicity. 2023. "The Digital Media Universe: Measuring the Revenues, the Audiences, and the Future Prospects."

26 Nordicity. 2020. "Re:Venues: A Case and Path Forward for Toronto's Live Music Industry."

27 <https://www.rootsmusic.ca/2024/09/26/folk-music-ontario-is-now-folk-canada/>



Section III:

THE LIVE MUSIC INDUSTRY IN CANADA

3.1 Profile of Live Music in Canada

The live music industry in Canada is highly diverse and made up of several different types of “assets.”²⁸

Assets include the various tangible (physical spaces and places) and intangible (such as stories and traditions) resources that are integral to the operation of an industry and possess economic value. In the context of the music industry, assets include venues, professional services, and music-related businesses and organizations.²⁹

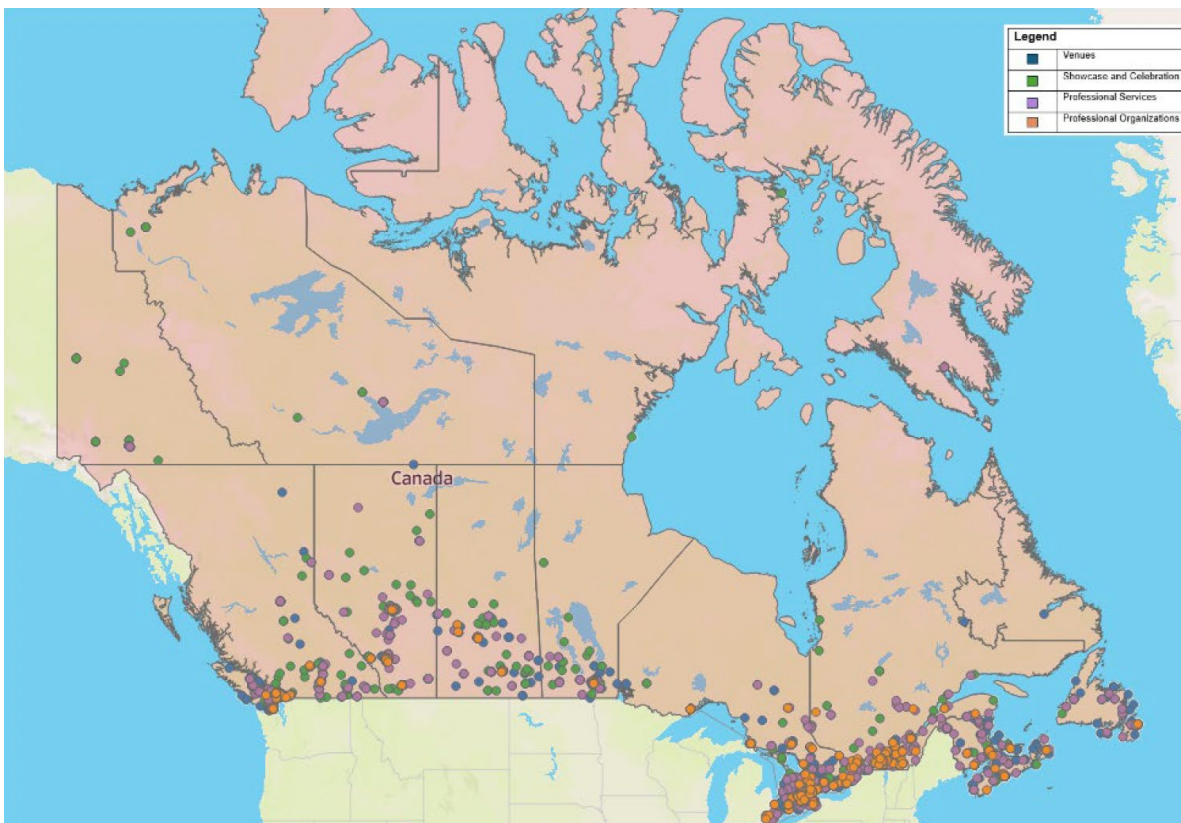
To support an understanding of the breadth of the Canadian live music industry, these assets have been visualized into a dynamic spatial map, as seen in Figure 2 below.³⁰ Note that the spatial map is not exhaustive. It excludes individuals and certain locations, such as those that are not registered or are without readily available addresses.

28 Please see Table 3 in Section 2 for a categorization of the various live music industry assets used.

29 Full asset identification identified via the Music Industry Categorization Framework Figure 1.

30 The mapping approach included using publicly available sources for all aspects of the mapping, including open data sources and shapefiles. The asset list was compiled through desk research which included a three-tiered approach using registered businesses from D&B Avention, provincial music industry association lists, and a web scraping on Google Maps.

FIGURE 2:
Overall Live Music Asset Map



Source: CLMA EIA Asset Identification and Tableau

The full map, as well as individual maps focusing on four main categories (venues, professional services, professional organizations, and showcase and celebration) [is accessible and can be viewed via Tableau](#).³¹

The map provides a snapshot of some **3,750 known assets** that were identified spread across the country.³²

While this map is certainly not exhaustive, it does indicate that:

- Hard infrastructure such as traditional live music venues and entertainment establishments are predominantly located in urban areas – largely correlating with population centres.
- Festivals and events are more widely dispersed across the country and not confined to urban areas. It is acknowledged that many festival organizations have invested in permanent infrastructure in their respective communities. However, the spatial map illustrates that showcases and celebrations are not limited to formal venues, but also utilize open spaces like fields and parks.
- Music related work and activity does not only occur in urban centres. Professional services related to the production of live music (e.g., music production, editing support), are more dispersed across the country, indicating that the live music industry supports employment for Canadians in both rural and urban contexts.

31 The interactive map is a dynamic tool that offers features beyond a static map. Users can filter data and hover over specific live music assets to reveal details such as the asset's name, city, and subcategory, enhancing the depth and usability of the visualization. On a broader scale, the tool enables users to grasp the full scope of live music activities occurring nationwide. This map can be updated and continually added to (e.g., on an annual basis) if new lists of assets are shared with Nordicity.

32 It is important to note a few limitations and constraints of the spatial map. First, it represents only a snapshot in time, as assets such as businesses or venues can evolve, relocate, or cease operations. Additionally, the map does not focus on identifying specific individuals but focuses assets which could be identified by a registered business number. Certain categories, such as restaurants and bars that host live music occasionally were identified using industry association lists rather than individual research, as there are too many general establishments to identify comprehensively. Finally, the spatial map does not include all identified assets from the asset resource identification exercise such as those which did not have readily available addresses.



First Light Centre for Performance & Creativity by Dan Smith

Venues serve as the backbone of the live music industry by providing a platform for artist discoverability and audience growth, and thus are a critical stepping stone in an artist's development.



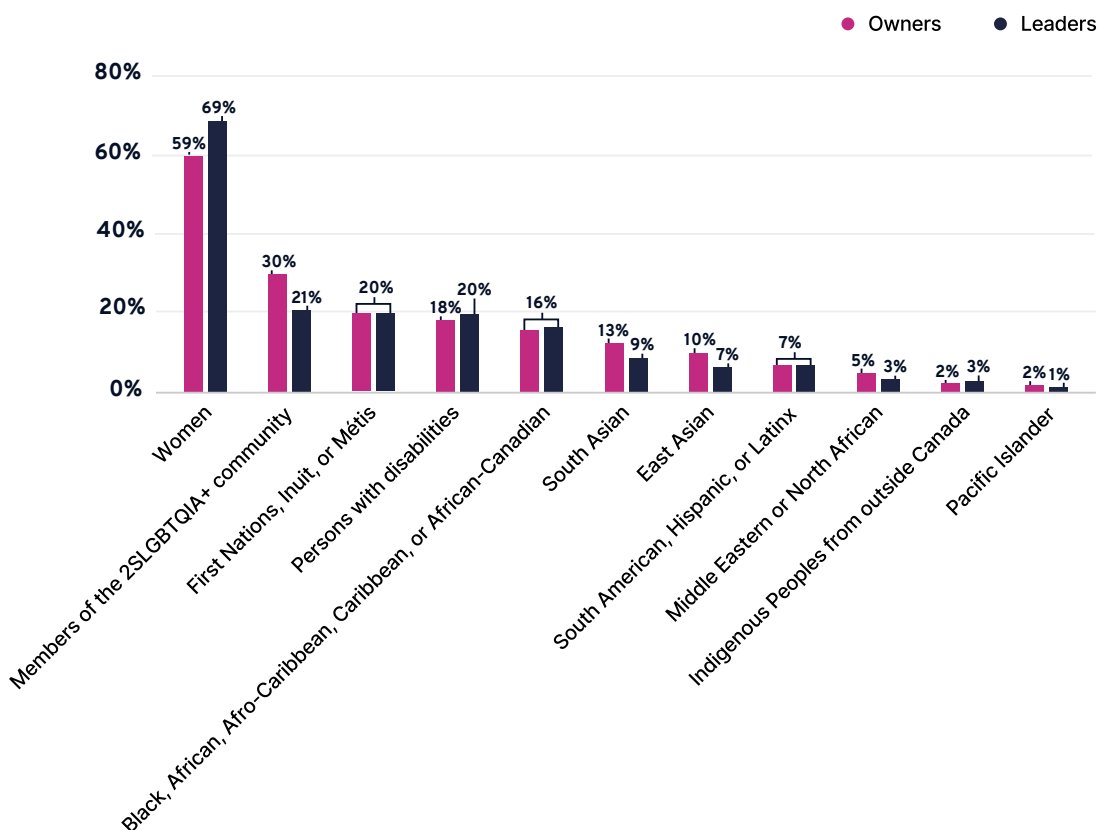
3.1.1 Demographic of Live Music in Canada

While limited data exists on the demographic breakdown of the live music industry specifically, data from the **Hear and Now** Survey, as well as other existing industry reports, shed light on representation in the industry.

Survey results indicate that the majority of companies are owned and led by women, with 59% of company owners and 69% of company leaders identifying as women (see Figure 3 below). Additionally, 30% of company owners and 35% of company leaders identify as members of the 2SLGBTQ+ community.

By contrast, less than a third of company owners and company leaders who responded to the survey did not identify as part of any equity-deserving group. This data, visualized in Figure 3 below, suggests that the industry is making strides in gender representation, however, these strides may not be inclusive of IBPOC communities. For instance, only approximately 21% of women company owners and 24% of women company leaders identify as Indigenous, Black, or a Person of Colour. As the survey is just a sample of the industry, further investigation into this topic is recommended.

FIGURE 3:
Diversity of Music Company Owners and Leadership



n=184

Source: Nordicity, Hear and Now Survey

There is less representation, overall, when it comes to Indigenous, Black, and People of Colour (IBPOC) in Canada's live music industry. According to *Closing the Gap* – a report highlighting the challenges and inequities in live music – a number of systemic barriers continue to exist for IBPOC live music workers in Canada.³³ These barriers include underrepresentation in leadership roles, disparities in income, and career progression.

While IBPOC individuals are more frequently represented in artist roles, survey respondents who identified as white individuals are more commonly found in entrepreneur and business ownership positions.³⁴ When it comes to employment status by race, Indigenous, Black, and People of Colour are more likely to hold additional jobs outside the live music industry to support their livelihoods. Indeed, according to a recent report by ADVANCE, IBPOC people in the music industry reported significantly decreased wages as a result of the pandemic, and the percentage of workers who relied on income sources outside of the music industry during the pandemic significantly increased.³⁵ In contrast, those who identify as white are more frequently represented among full-time workers in the industry, suggesting that IBPOC may face greater challenges in accessing higher-paying opportunities within the industry.³⁶

3.2 Live Events in Canada

In 2023, the global music industry experienced a robust recovery from the pandemic, with revenue surging to \$40 billion globally – nearly double pre-pandemic levels. The Canadian music market also grew by 12.2%, reaching US\$659.6 million, as the 8th largest music market globally. This increase marked the ninth consecutive year of growth for music globally.³⁷

However, global live music events in 2024 fell short of their projected performance, which was reflected in several major festivals in North America, such as Coachella. By examining the revenue per available room (RevPAR) in local vacation rentals during festival weekends, researchers can assess the festival's overall performance. Beyond lower Coachella ticket sales, the data revealed that accommodations reached 61% capacity compared to 72% in 2023.³⁸

33 CLMA. 2022. "[Closing the Gap: Impact & Representation of Indigenous, Black, and People of Colour Live Music Workers in Canada.](#)"

34 CLMA. 2022. "[Closing the Gap.](#)"

35 ADVANCE. 2022. "[Industry Analysis & The Value of Black Music In Canada.](#)"

36 CLMA. 2022. "[Closing the Gap.](#)"

37 IFPI. 2024. "[Global Music Report 2024.](#)"

38 Lamba, G. 2024. "[Coachella vs. Stagecoach Impact on Short-Term Rentals.](#)"

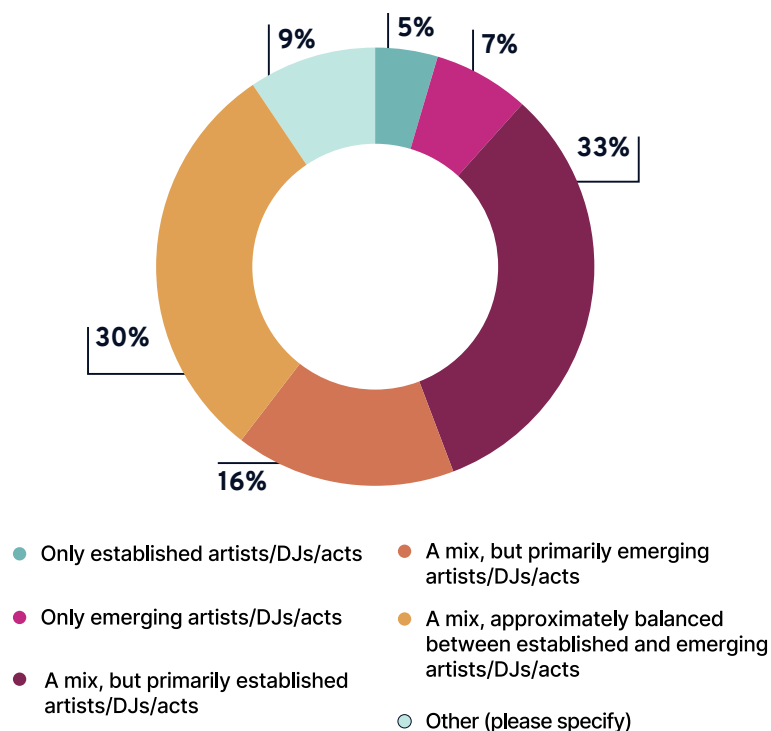
There are several potential factors contributing to the above outcome. Cancelled tours and festivals due to lower ticket sales, rising costs, and environmental impacts has led to overall industry decline, and high prices for top acts are exhausting fan budgets leaving less for mid-range artists. Relatedly, other elements such as rising inflation, visa fee hikes, and shortages of touring essentials have increased the costs of staging tours. Smaller venues, which are crucial for emerging artists, are closing, which is reducing options for smaller-scale performances. Finally, despite the market being saturated with tours, many fans are choosing between fewer shows, leading to oversupply.

Live music venues and festivals, events, and award shows in Canada play an integral role in the country's live music industry – especially in terms of their revenue, expenses, profits, and labour dynamics. Survey results indicate that Canadian concert bookers and promoters booked an estimated 18,945 live music shows in Canada in 2023 – which, conservatively translates to approximately 50 shows per day across the country.

Venues in Canada showcase a diverse range of music show types, with the vast majority (a combined 79%) of venues showcasing a mix of emerging and established musical acts. Approximately 33% of venues that present a mix of emerging and established acts primarily showcase the established acts, and a further 33% showcase a balance of emerging and established musical acts. The chart below illustrates the breakdown of music show types in Canadian venues.

In 2023 the Canadian music market grew by 12%, reaching US\$659.6 million, as the 8th largest music market globally.

FIGURE 4:
Music Show Types in Canadian Venues

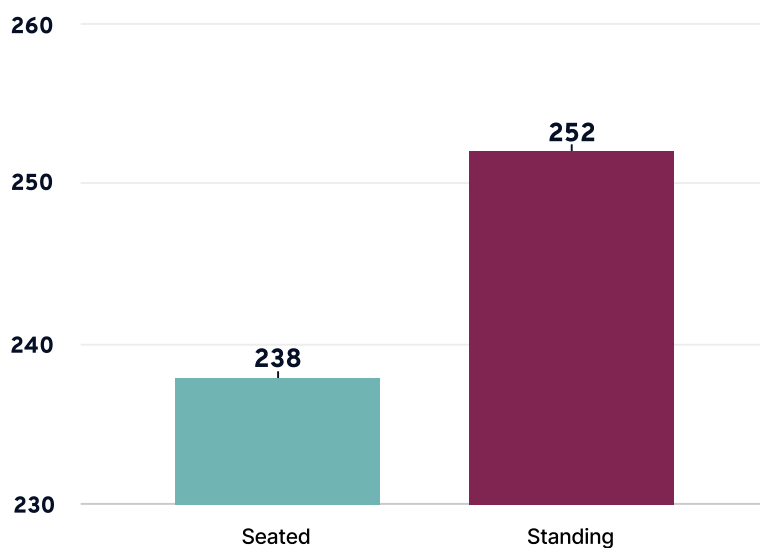


n=43

Source: Nordicity, Hear and Now Survey

Live music venues in Canada have an estimated average maximum capacity of 238 people for seated shows, and 252 for standing shows, as shown in the chart below.

FIGURE 5:
Average Venue Capacity, Canada 2023



n=43

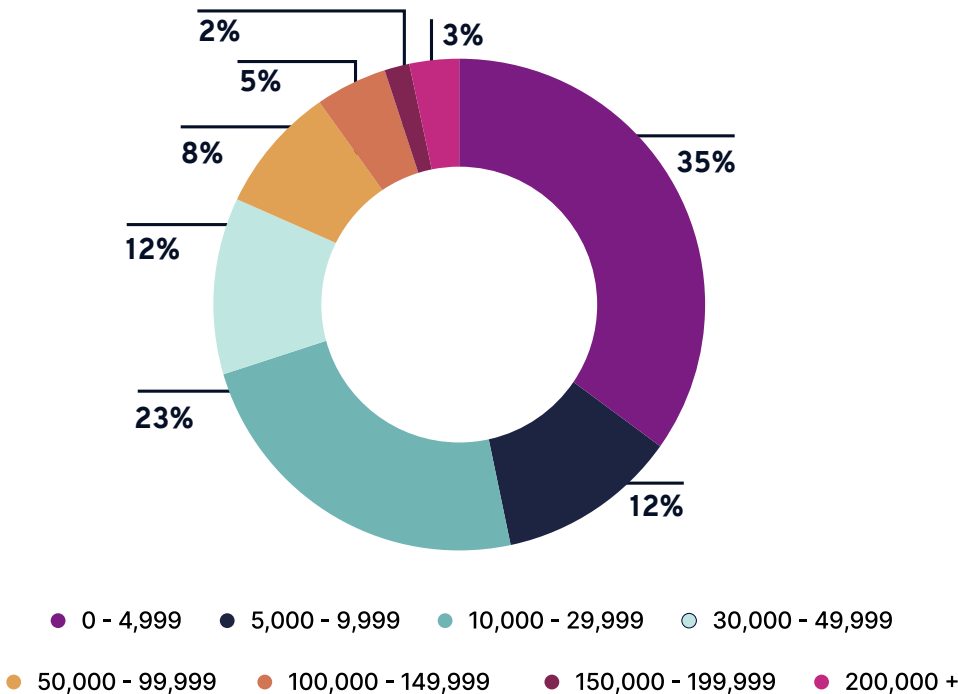
Source: Nordicity, Hear and Now Survey

Survey results indicate that venues in Canada hosted an average of 119 shows each in 2023, with an average fill rate of approximately 64%. Considering the venue capacities cited above, the average seated live music show in Canada attracts an estimated 152 attendees, and the average standing show approximately 160 attendees.

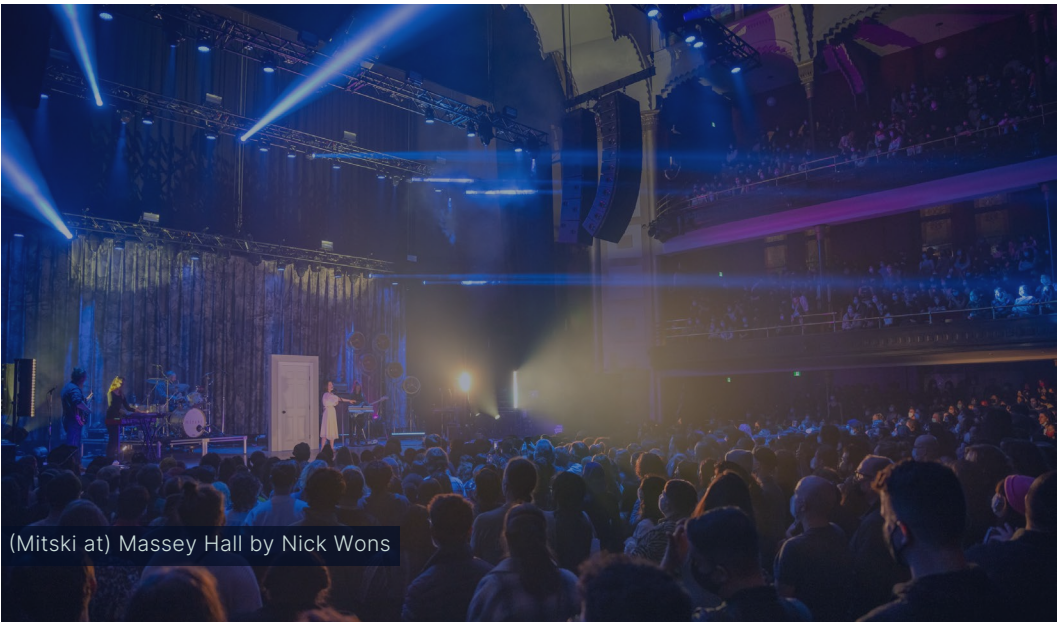
Festivals, events and award shows in Canada vary greatly in capacity and length. In 2023, festivals, events, and award shows are estimated to have hosted a total of 10.02 million attendees, with an estimated 59% of total attendees holding paid tickets.

Nearly half (47%) of festivals, events, and award shows hosted less than 10,000 people in 2023, and more than one-third (35%) hosted between 10,000 and 50,000.

FIGURE 6:
Breakdown of Festivals, Events, and Award Shows by 2023 Attendance

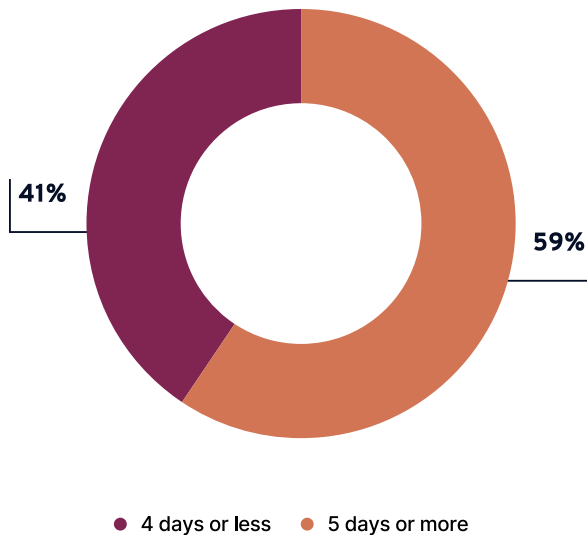


n=60
Source: Nordicity, Hear and Now Survey



The majority (59%) of Canadian festivals, events, and award shows in 2023 were four days or less.

FIGURE 7:
Length in days of Canadian Festivals, Events, Award Shows in 2023



n=59

Source: Nordicity, Hear and Now Survey

These statistics set a baseline to track future trends in the scale and duration of live music events in Canada. With nearly half hosting fewer than 10,000 attendees, there appears to be a preference for more intimate gatherings, potentially reflecting shifts in audience engagement and logistical considerations. Additionally, the sizeable proportion that attracts between 10,000 and 50,000 attendees suggest a healthy mid-range event market. The predominance of shorter events lasting no longer than four days may indicate organizers' preference to maximize impact without overextending human and financial resources, more of which are required for events of a longer duration. Overall, these statistics highlight a live music industry that boasts broad diversity of event offerings in terms of size and duration.

3.3 Nuances Across Regions

As the live music asset map in Section 3.1 demonstrates, Canada's live music industry is as vast and diverse as the country's geography. Different regions in Canada experience the live music industry in different ways. For instance, a live music worker in Montreal exists in a very different industry context than a live music worker in Thunder Bay or Yellowknife.

Region-specific industry roundtable discussions were conducted to understand (qualitatively) more about the live music industry across Canada. The descriptions below do not necessarily provide a comprehensive account of the live music industry in each region, but rather highlight a few unique regional nuances that influence the shape and size of the industry in different corners of the country.

3.3.1 Ontario

Ontario is the largest music market in Canada, with Toronto sitting at the centre of Canada's music industry. Though Toronto remains the hub of live music in Ontario, music professionals noted in roundtable discussions that live music activities are increasingly moving into the sprawling suburbs of the Greater Toronto Area (GTA) and further into surrounding cities. Ontario municipalities like Mississauga,³⁹ Hamilton,⁴⁰ and London⁴¹ have all taken concrete steps to build live music capacity to help them thrive as music cities independent of Toronto's pull. Respondents indicated that more and larger tours are choosing to make stops on the periphery of the GTA, which has helped increase the level of access that audiences in these markets can enjoy within their communities. The asset map (section 3.1) indicates that Ontario has a lower-than-average concentration per population of live music assets as compared to some other smaller Canadian markets, but this may be counterbalanced by the relatively larger size and capacity of many Ontario-based venues and businesses.

Respondents also considered Southern Ontario to be perhaps the most readily viable touring market in Canada for artists touring and small and medium-sized venues due to population density, the closeness of several large music markets, and the proximity to the United States.

That said, Ontario is home to a strong festival ecosystem that spans across the entire province – not just cities in Southern Ontario – and includes the Festival of Sound in Parry Sound and Wake the Giant in Thunder Bay, to name a few examples.

39 City of Mississauga. 2023. "[Mississauga Music Strategy](#)."

40 City of Hamilton. 2020. "[Re:Venues: A Case for Hamilton's Live Music Industry](#)."

41 City of London. N.d. "[London City of Music](#)."



Supercrawl by Mike Highfield

3.3.2 Quebec

Industry roundtable participants note that Francophone music makes up the most sought-after live music experiences in most of Quebec – particularly outside of Montreal. The emergence of a mainstream in Quebec Francophone music aligns with the goals of the provincial government's public support mechanisms in terms of funding for Francophone recording artists and live music activities. Like Ontario, Quebec's festival scene is also celebrated, with established festivals like Osheaga and newcomers like Lasso seeing resounding success.⁴² Not only do festivals provide avenues to celebrate Quebec and Francophone culture, but they are an important training ground for emerging artists, organizers, promoters, technicians, agents, and other live industry positions.

3.3.3 British Columbia

British Columbia (BC)-based industry roundtable participants note the province's diversity in terms of cultural and ethnic backgrounds, music styles, regionality, and urban/rural split. The province's major population centres, like Greater Vancouver and Greater Victoria, have well-established music economies with mainstream industry representation, and can accommodate and attract major touring artists. Vancouver has a high proportion of "occasional" live music venues, per the asset map (section 3.1), which seems to track with the industry's continued vibrancy despite the ongoing development-driven loss of dedicated live music venues in the city.⁴³

Meanwhile, local music is core to the cultural identity of many of BC's smaller communities, particularly in the interior and Vancouver Island regions. One industry professional described the rural BC music community as a "mushroom" ecosystem, where new music events and summer festivals continue to pop up nearly every year, and are embraced by their communities with a sense of local pride. Roundtable participants also note that BC's diverse topography makes it particularly harder for smaller markets like Northern BC and the Gulf Islands to access supplies and infrastructure for live music activities. Smaller and more remote communities often rely on their own resourcefulness and creativity in terms of resource sharing and collaboration.

42 Canada Billboard. 2024. "[SZA, Tyla, Green Day, RAYE & More: Highlights From Osheaga 2024](#)."

43 CTV News. 2023. "[Vancouver artist creates open-source map of lost spaces, struggling community latches on](#)."

3.3.4 Prairies (Alberta, Saskatchewan, Manitoba)

Industry roundtable participants from the Prairie provinces of Alberta, Saskatchewan, and Manitoba note a prominent DIY and entrepreneurial energy across the Prairies, where artists support one another and collaborate across genre and medium. These activities lean on local supports such as strong industry associations and a core group of local promoters in each city. The asset map (see section 3.1) reveals a comparatively strong presence of industry associations and other live music professional support roles (e.g., promoters) across the Prairies, particularly in Alberta and Manitoba, indicating strong employment impacts from live music in those provinces, even outside dense population centres. While industry roundtable participants indicate a shortage of dedicated live music venues, the asset map indicates that the Prairies, like BC, also have a high proportion of “occasional” live music venues and music festivals, particularly in Manitoba and Saskatchewan. This use of “occasional” spaces aligns with the DIY and entrepreneurial Prairie ethos that roundtable participants referenced.

As migration continues to bring more newcomers west, industry roundtable participants note that genre lines denoting what constitutes “Prairies music” are changing. While country, rock, and folk remain prominent genres, industry roundtable participants have observed increasing diversity of genre in cities across the Prairies, such as an emerging afro-beat scene built around a growing Black music community. Given a smaller music market in the Prairies, roundtable participants note that there are fewer major tour stops – particularly in Manitoba and Saskatchewan – and the distance from other major urban markets tends to reduce the likelihood of proximity bookings.

3.3.5 Atlantic Canada

The Atlantic provinces of Nova Scotia, New Brunswick, PEI, and Newfoundland and Labrador each have their own distinct character and cultures. However, together they form a cohesive Atlantic Canadian music scene, where both audiences and artists frequently travel and perform throughout the region. Atlantic Canada can struggle to secure tour dates from major artists due to cost and market access issues, which has in turn helped foster a strong community of local artists. Industry roundtable participants note that



Winnipeg Folk Festival by April Carandang

Canadian concert bookers and promoters booked an estimated 18,945 live music shows in Canada in 2023 – which, conservatively translates to approximately 50 shows per day across the country.



Folk On The Rocks by uplift media

there is a strong audience appetite and support for local artists, opening opportunities for those artists to establish themselves across the Atlantic provinces as 'regional stars.' While some of these artists may eventually leave Atlantic Canada for larger markets, many do remain to build careers within the region. Strong local and regional festival culture is also an identified market opportunity from May to September. Larger cities like Halifax and Fredericton are particularly viable touring markets with their large post-secondary student communities. The strong presence of music industry associations helps to support small-market touring and foster local and regional talent. In particular, industry roundtable participants note that New Brunswick's large Francophone community brings linguistic and musical diversity to the Atlantic Canadian music scene, while also presenting unique policy challenges related to dispersing funding support along two linguistic streams. Meanwhile, Prince Edward Island and Newfoundland and Labrador both enjoy a higher-than-average concentration of live music assets, perhaps owing in part to dedicated cultural venue funding initiatives like the Performance Venue Grant in PEI and the Arts Infrastructure and Programming Fund in Newfoundland and Labrador.⁴⁴

3.3.6 Northern Canada (Yukon, Northwest Territories, Nunavut)

The live music industry in Canada's Northern territories thrives on the resilience and creativity of local communities. Northern Canada-based industry roundtable participants refer to their live music scene as a supportive network of "dreamers and doers," helping to make it more accessible for emerging artists. Compared to their counterparts in the South, the experiences of live music workers in Northern communities are grounded in the reality of their remote geography, often contending with the high cost of touring through Northern markets, limited broadband access, and extreme weather events impacting supply lines. Industry roundtable participants note a prevailing spirit of collaboration and resourcefulness whereby Northern live music workers adopt a "rising tide lifts all boats" mentality to achieve a thriving live music ecosystem, navigating logistical hurdles by supporting one another, such as by sharing resources and equipment through social media platforms. In terms of live music assets, as compared to the provinces each of the three territories maintains a very high proportion of live music assets as a function of their population, suggesting a strong continued focus on preserving vibrant community cultural experiences.

44 Government of Newfoundland and Labrador. N.d. "[Funding Programs – Culture](#)." Statistics on how many venues take advantage of the grants is an area for future research.

Some emerging artists are forced to confront limited growth opportunities by moving from the North to larger markets to the South, but generally roundtable participants note strong local support for artists to thrive in their own environments. Meanwhile, one participant offered that “festivals aren’t just festivals up here,” noting a high level of outreach and community organizing that takes place alongside musical elements. Many artists and organizers also embrace a multidisciplinary approach in their festivals and event programming, blending live music with visual arts and other arts offerings, which enriches audience engagement while harnessing the strength of arts workers in other industries.

3.4 Music in Indigenous Communities

Indigenous communities are as vast and diverse as the country itself. However, there are several key similarities in the experiences of Indigenous music workers seeking to build capacity within their own communities and to penetrate the mainstream industry. While many successful Indigenous artists have found ways to chart their own path within a majority settler music ecosystem, there is also a growing Indigenous-led segment of the music industry. Inroads made by organizations like the Indigenous Music Office and Indigenous-led record labels like Land Back Records, Red Music Rising, and Ishkōdé Records are helping to create new and larger opportunities to lift up more Indigenous artists, both in the recorded and live industries. Streaming and other emerging discovery tools like TikTok have also been instrumental in creating opportunities for Indigenous artists to break out, especially those from remote, northern, and/or rural reserve communities. Though there are various non-economic ways to measure the value of cultural works, APTN found in 2018 that Indigenous music alone contributes almost \$78 million to Canada’s GDP annually.⁴⁵

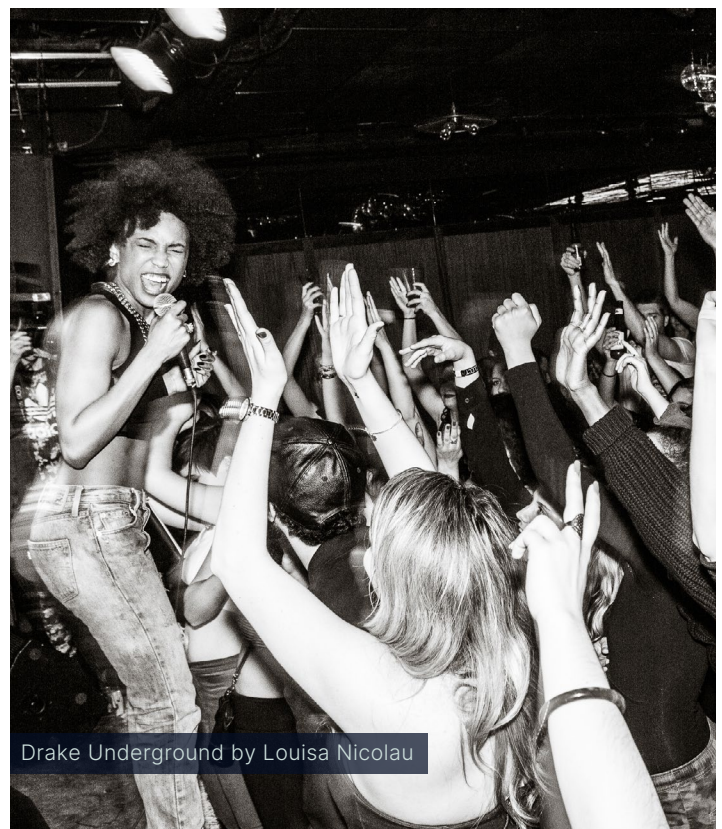
In terms of more traditional Indigenous music activities, such as powwow, Indigenous music industry professionals note a gulf between the “capitalist extractive” model of measuring music activities in terms of economic output, and traditional Indigenous models of understanding the value of music in community – which are not as easily measured. There is often a dollar value associated with traditional music activities, but measurement of that value alone misses

the deep social and intrinsic value that those activities bring to community (e.g., by accompanying drum dance, hand games, and other cultural experiences). Roundtable participants also identified a false dichotomy between traditional and commercial music activities in Indigenous communities; with enhanced access to the commercial music industry, creators and purveyors of traditional Indigenous music would also embrace opportunities to find commercial success.

Overall, Indigenous roundtable participants emphasize the unique role that Indigenous artists and music professionals play within the live music ecosystem. This role is centered on telling the stories of the first peoples of this land and affirming national sovereignty. Indigenous artists and professionals are uniquely equipped to showcase these cultural narratives, bringing forward facets of expression that affirm their identity and sovereignty, thus carving out a significant and distinct presence in the industry.

3.5 Financial Profile: Industry Revenue, Expenses, Labour

Canada’s live music industry is an economic driver, generating revenue, and contributing to labour in the country. This section outlines a financial profile of the live music industry in Canada, highlighting its revenue, expense patterns, and certain labour dynamics. Examining these components will help show the financial and workforce environment that informs the industry’s overall economic impacts.



Drake Underground by Louisa Nicolau

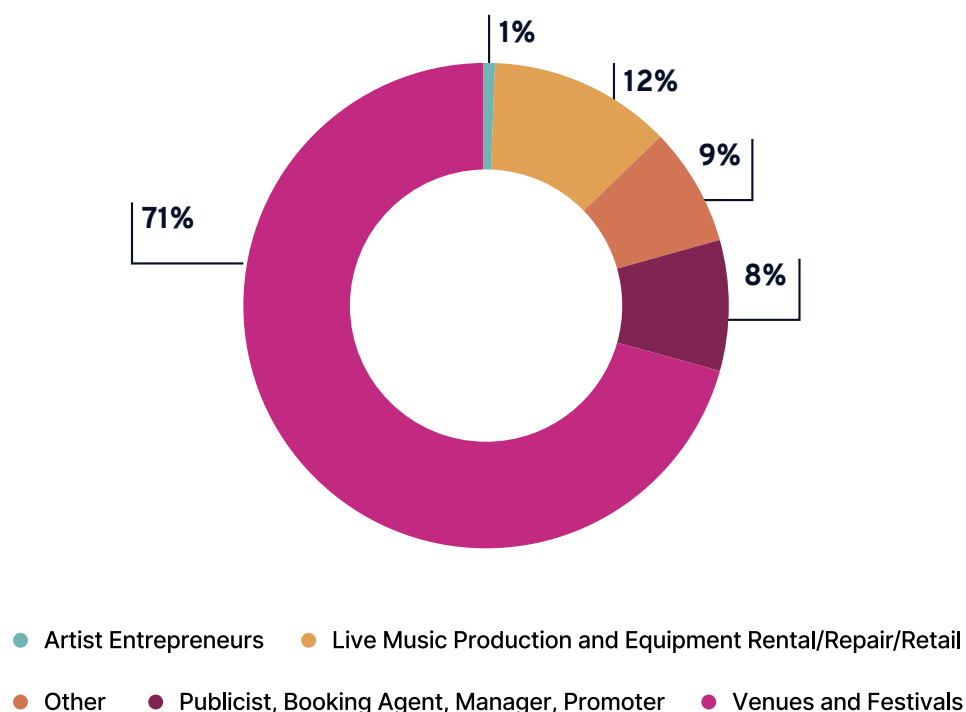
45 APTN. 2018. “[National Indigenous Music Impact Study](#).”

3.5.1 Revenue

Through extrapolating the data gathered in the Hear and Now Survey, Nordicity estimates that **live music companies (including for-profit and non-profit) in Canada earned a total of \$1.88 billion of revenue in 2023**. This total is made up of revenues from five different types of companies, with venues and festivals making up 70%. The differences seen in these percentages are due to the nature of these businesses. For example, venues and festivals are able to generate revenue from multiple revenue streams beyond ticket sales, such as food and beverage services, merchandise, sponsorships, and more; artist entrepreneurs rely on performance fees, which can be a fixed portion of ticket revenue, and can be limited by the frequency of performances, audience reach, and demand for their music. Therefore, this data implies that a company's revenue potential depends on its type, and that not all companies have the same earning potential.

The chart below provides a visual representation of how the different live music company or organization types in Canada contributed to the industry's total 2023 revenue.

FIGURE 8:
Breakdown of 2023 Live Music Revenue Share by Company/Organization Type ⁴⁶



n=392

Source: *Nordicity, Hear and Now Survey*

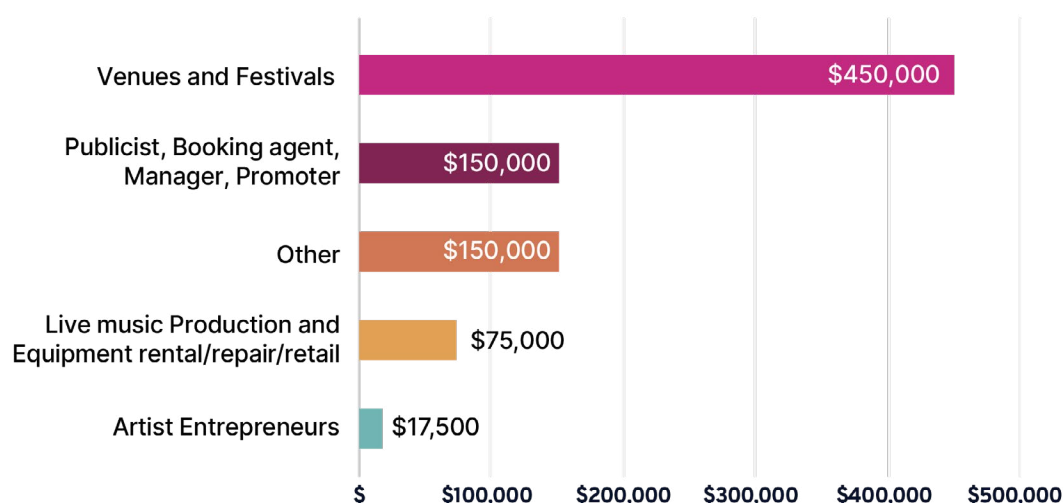
⁴⁶ Note that organizations categorized as "other" include trade and industry organizations, professional associations, consultancies, and multi-faceted companies.



In 2023, festivals and venues had the highest median revenue at \$450,000 for the year, while artist entrepreneurs had the lowest median revenue in 2023, at \$17,500. These stark revenue differences suggest that a significant portion of revenue in live music flows to companies who deal directly with audiences and attendees – indicating that the closer a company can get to the audience, the more revenue potential they may have.

The chart below provides a visual representation of median annual 2023 revenue for the various types of live music companies and organizations in Canada.

FIGURE 9:
Median Annual Company Revenue (2023), by Category



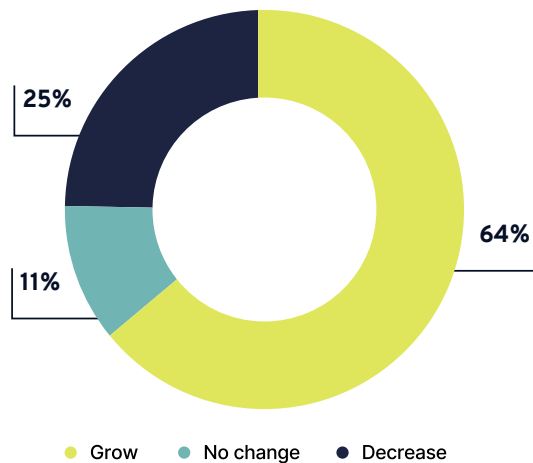
n=392

Source: Nordicity, Hear and Now Survey

There has been variation in revenue levels between 2023 and the previous year. Approximately **64% of companies saw growth in revenue between 2022 and 2023**, with over one-third of those (34%) reporting growth of 25% or more, an indication of a highly resilient industry that has worked to re-establish services and operations following years of disruption. The chart below shows how the revenue of live music companies in Canada changed between 2022 and 2023. This growth can be attributed to many factors but is likely (at least partially) to be the result of continued re-building in the post-pandemic years, as the availability of live music-related events and services returned and rebounded. An additional likely contributor is inflation, considering Canada's Consumer Price Index (CPI) rose 3.9% in 2023.⁴⁷

47 Statistics Canada. 2024. "[Consumer Price Index: Annual review, 2023.](#)"

FIGURE 10:
Change in Live Music Companies' Revenue, 2022 to 2023

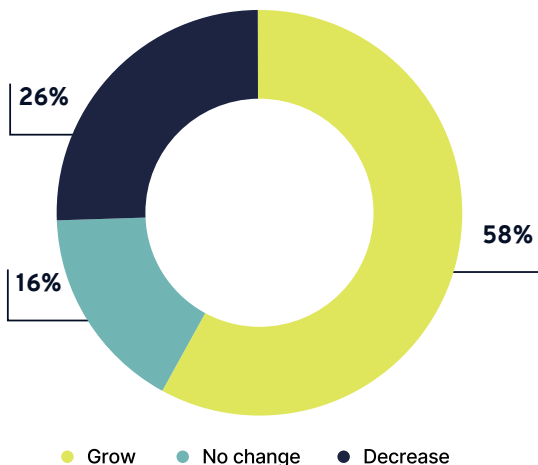


n=433

Source: Nordicity, Hear and Now Survey

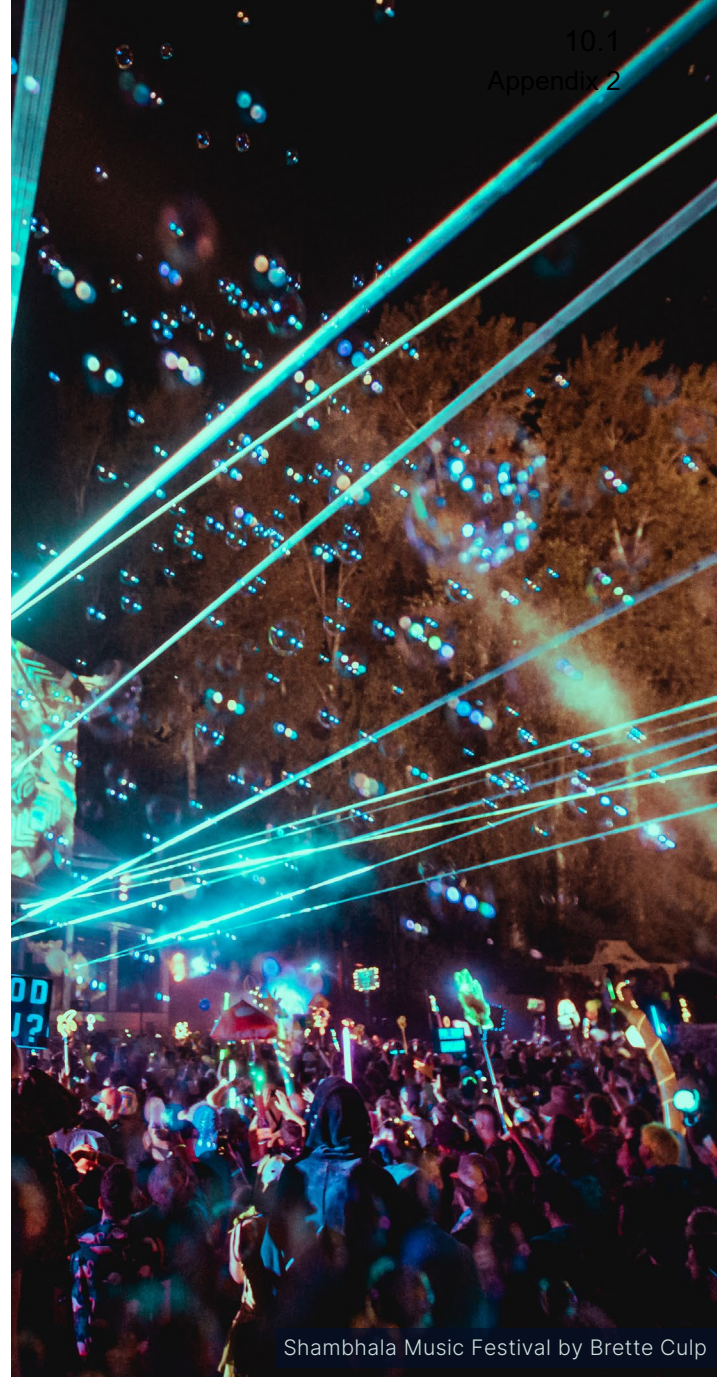
In addition, the majority of **live music companies in Canada expect their final 2024 revenue to grow again**; however, it is important to note that growing revenues may not translate to increased spending, as companies face ongoing economic uncertainty (see section 3.5.3 Labour for additional discussion). Over half (58%) of live music companies expect their final 2024 revenue to grow as compared to 2023 revenue, with one-fifth of those companies expecting revenue growth of 25% or more. Conversely, a combined 42% of companies expect no revenue change or a decrease in revenue, while half of those companies expecting revenue growth in 2024 forecast growth of 10% or less. The chart below provides a visual representation of how live music companies' revenue is expected to change between 2023 and 2024.

FIGURE 11:
Expected Change in Live Music Companies' Revenue, 2023 to 2024



n=433

Source: Nordicity, Hear and Now Survey



Shambhala Music Festival by Brette Culp

For-profit and non-profit live music companies in Canada earned a total of \$1.88 billion of revenue in 2023

Generally, these revenue growth trends may indicate economic recovery and rebounding consumer demand in the live music industry. The global trend of consumers prioritizing experiences, entertainment, and leisure over other expenses, known as the “experience economy,” is likely a significant contributor to the improving consumer demand.⁴⁸

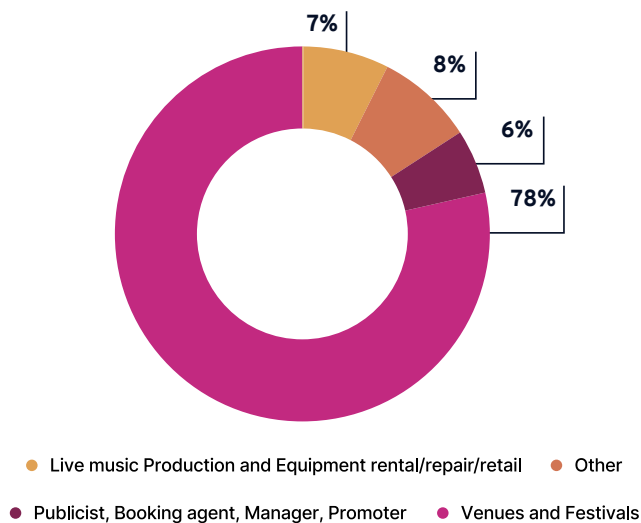
However, revenue increases might reflect companies’ need to adjust their pricing to cover higher operations costs as a result of high inflation rates in the post-pandemic years. Inflation can also lead to higher selectivity on the consumer side, which could lead to future revenue fluctuations in the future. As the live music industry continues to rebuild, companies in the industry may need to explore innovative strategies to offset economic pressures which tend to temper consumer enthusiasm.

3.5.2 Expenses

Nordicity estimates that live music companies (including for-profit and non-profit) spent a total of \$1.65 billion in 2023. Expenses from festivals and venues together accounted for the largest share, at approximately 79%, while artist entrepreneurs accounted for the smallest share, at less than 1%. Keep in mind that a company’s operational expenses depend on the type of business it is (e.g., festival), and not all companies should or need to spend the same amount. For example, it costs significantly more to run a festival or operate a venue than it does to run a live music management firm.

The chart below provides a visual representation of how different live music company/organization types in Canada contributed to the industry’s total 2023 expenditures.

FIGURE 12:
Breakdown of 2023 Live Music Expenditure Share by Company/Organization Type



n=392

Source: Nordicity, *Hear and Now Survey*

48 Bloomberg. 2024. [“Sports and Music Tourism Will Soon Represent a \\$1.5 Trillion Economy.”](#)

The largest share of 2023 live music expenses went to employee wages and benefits and programming costs, followed by event costs, tech rental, marketing, rent, and expenses categorized as “other.” The table below provides a breakdown of total 2023 expenses by expense category.

TABLE 4:
Breakdown of Total 2023 Live Music Industry Expenses, by Expense Type

Expense Category	% of Total
Employee wages and benefits	29.05%
Rent	4.33%
Utilities	1.87%
Marketing	5.62%
Travel	0.35%
Accommodation	0.14%
Insurance	2.10%
Purchase of fixed technology (e.g., lighting, sound equipment)	2.11%
Rental of fixed technology (e.g., lighting, sound equipment)	6.41%
Licensing costs (e.g., SOCAN)	1.08%
Facility maintenance costs	2.74%
Ticketing	2.13%
Bar and/or restaurant costs	3.98%
Artist development	1.59%
Programming costs (i.e., paying artists)	18.18%
Other event costs	9.58%
Other professional services	3.10%
Real estate services	0.32%
Other expenses	5.32%

Source: Nordicity, Hear and Now Survey

The nature of companies' or organizations' annual expenditures vary depending on type. For example, in 2023, all organization and company types spent the largest share of their total expenses on Canada-based labour; however, live music production companies and equipment rental/repair/retail companies spent 47% of their expenses in this category while artist entrepreneurs spent less than 30% of their expenses in this category. Venues and festivals spent the lowest share of their total expenses on Canada-based labour, but conversely spent one of the highest shares on programming costs (20%) out of all company types. Publicists, booking agents, managers, and promoters spent an estimated 22% of their total expenses are programming costs (i.e., paying artists), which is the highest proportion of expenses paid in this category out of all company types.

The table below provides a breakdown of expenses for different live music company types in Canada in 2023.

TABLE 5:
Expense Breakdown of Live Music Companies, Canada 2023

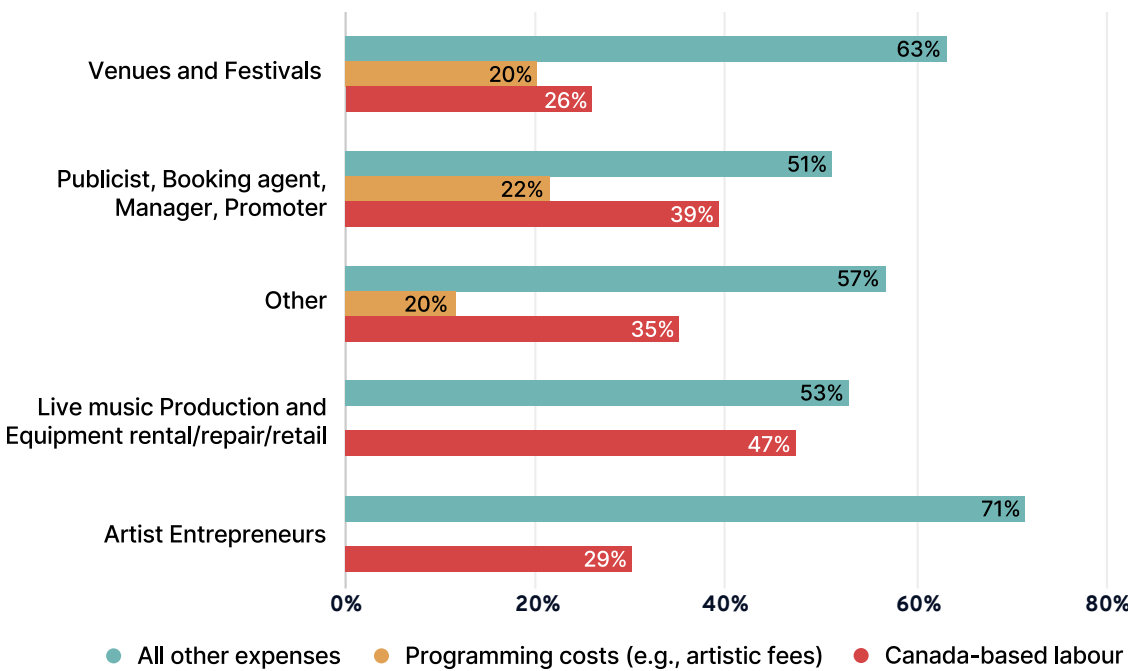
	Artist Entrepreneurs	Live music Production and Equipment rental/repair/ retail	Publicist, Booking agent, Manager, Promoter	Venues and Festivals	Other
Canada-based labour	29%	47%	39%	26%	35%
Rent		9%	7%	3%	8%
Utilities			1%	2%	1%
Marketing	11%	6%	10%	5%	10%
Travel	15%		2%		3%
Accommodation	7%		1%		1%
Insurance	5%	4%	1%	2%	2%
Tech purchase		4%		2%	
Tech rental	5%	13%		7%	4%
Licensing (e.g. SOCAN)				1%	1%
Facility maintenance				3%	1%
Ticketing	2%			3%	
Bar and restaurant costs	2%			4%	6%
Artist development				2%	
Programming costs			22%	20%	12%
Event costs			9%	11%	8%
Professional services	11%	2%	2%	3%	4%
Real estate services					1%
Other expenses	14%	14%	4%	5%	4%

Source: Nordicity, Hear and Now Survey

Note: blank cells indicate expense categories that were not relevant for certain respondent types.

Canada-based labour and programming costs combined represents the largest expense category for all company types in Canada. Client-facing companies and organizations (publicists, booking agents, managers, and promoters) spend the highest proportion of their annual expenses on Canada-based labour and programming costs, at a combined 61%. Artist entrepreneurs spent the smallest proportion of their annual expenses in these two categories, at 29%. The chart below provides a visual representation of the proportion of companies' expenditures dedicated to Canada-based labour and programming costs.

FIGURE 13:
Labour and Programming Expenses of Live Music Companies, Canada 2023



This distribution of expenses, with its substantial concentration in labour and programming across all company types, highlights the importance of human resources in the live music industry. Skilled personnel are essential in the execution of live music events and for the continued availability of services in the industry. Without skilled labour, the live music industry would likely struggle to maintain the standards that audiences and customers expect.



Fortune Sound Club by Brandon Artis

For-profit and non-profit live music companies spent a total of \$1.65 billion in 2023

3.5.3 Labour

Labour represents the largest expense item in total national expenditures (as discussed above) and is therefore a significant driver of economic activity for the live music industry in Canada. In 2023, it is estimated that the average salary for a full-time employee in the Canadian live music industry is slightly more than \$31,000. This figure describes salary only, and does not include any compensation associated with benefits, bonuses, or other compensation vehicles. According to Statistics Canada, the average Canadian income in 2022 was \$57,100 with a median income of \$43,100,⁴⁹ both of which are higher than the estimated average salary for a full-time worker in the Canadian live music industry. This finding implies Canadian live music workers bring home a lower salary than the average worker in Canada. Indeed, this salary level falls under the official Canadian poverty threshold,⁵⁰ implying that many full-time live music workers in Canada are likely to be in poverty, especially in areas of the country with higher cost of living (such as Toronto and Vancouver).

As competition for talent intensifies, especially in a recovering industry, companies may need to prioritize employee well-being and professional development. By fostering a supportive work environment, and offering more competitive compensation, live music companies may be able to attract and retain the human resources necessary to not only sustain their operations, but to drive innovation, and contribute to industry growth as a whole.

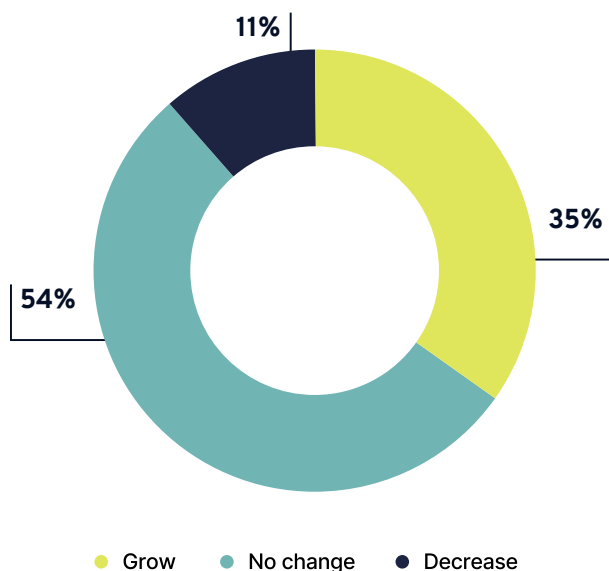
Well over one-half (54%) of live music companies indicate no expected change in headcount (defined as the number of people employed at a company) from 2023 levels, and over one-third (35%) expect their headcount to increase. Of those companies who expect their headcount to grow, over half (55%) expect growth of 10% or less, but over a quarter (27%) expect growth of over 20%.

The chart below provides a visual representation of how companies expect final 2024 headcount to differ from 2023.

49 Statistics Canada. 2024. ["Income of individuals by age group, sex and income source, Canada, provinces and selected census metropolitan areas."](#)

50 Statistics Canada. 2022. ["Canada's Official Poverty Line."](#)

FIGURE 14:
How Canadian Live Music Companies Expect 2024 Headcount to Change Compared to 2023



With the majority of companies forecasting either no change or modest change to their headcount, the live music industry as a whole seems to be making only slight increases at most to sustain operations or support slight, gradual growth. This conservative approach may be the result of uncertain economic conditions and suggests a focus on maintaining momentum and cautious incremental improvement, rather than fast expansion. However, with the right support and incentives in place, the live music companies who expect growth may be able to accelerate their hiring plans and boost overall productivity, potentially driving greater activity and output across the industry.



(Run the Jewels at) Rifflandia Festival by Laura Harvey



Section IV:

IMPACTS OF LIVE MUSIC

Live music in Canada generates economic impacts that can be expressed in terms of gross domestic product, labour income, employment, and fiscal impacts (e.g., taxes).

These impacts come from expenditures related to live music company **operations** and **tourism**, and they are composed of direct, indirect and induced impacts.

Gross domestic product (GDP) is a key economic indicator that represents the total monetary value of all goods and services produced within a country. The activities of industries and organizations to produce goods and services contribute to a jurisdiction's GDP. **Labour income** is defined as total earnings or income received by workers as a result of a specific economic activity. Employment is expressed in terms of **full-time equivalent jobs** (FTEs), where an FTE is defined as someone who works a 40-hour work week, approximately 52 weeks per year. Importantly, employment impact is not a measure of the number of people employed. For the purposes of this project, **fiscal impact** is the sum of estimated personal income

taxes, corporation income taxes, consumption taxes, property taxes, and other fees; fiscal impacts are expressed at the federal and provincial, levels, and total fiscal impact is the sum of the above.

The main source of direct economic impact in any economy is money paid to or generated by **individuals**. As such, the **direct impact** contributed by any entity comes from salaries and wages paid to employees, as well as any profits it earns from its operations.

In addition to the direct impact, economic activity also has two key types of **ripple effects** on the broader economy. These include:

- **Indirect impacts:** the employment, labour income, GDP, and fiscal impacts generated within the supply chain, as businesses purchase goods and services to support their operations, and
- **Induced impacts:** the employment, labour income, GDP, and fiscal impacts generated by workers (i.e., those who have earned income at the direct and indirect impact stages) spending their wages on everyday goods and services.



Joey Bada\$\$ at MRG Concerts by Bruno Martin Del Campo

The sum of the direct, indirect, and induced economic impacts is the total economic impact.

Live music company operations and tourism spending related to live music contributed the following economic and fiscal impacts in Canada in 2023:

TABLE 6:
Summary of Economic and Fiscal Impacts of Live Music, 2023

Category	Live Music Operations	Tourism	Total Impact (Operations + Tourism)
Employment (FTEs)	27,490	77,150	101,640
Labour Income	\$1.17 billion	\$4.67 billion	\$5.84 billion
Gross Domestic Product	\$2 billion	\$8.92 billion	\$10.92 billion
Fiscal	\$514 million	\$3.21 billion	\$3.73 billion

Note: figures may not sum exactly due to rounding.

The subsections below detail the economic and fiscal impacts of live music company operations and tourism.

4.1 Economic Impacts – Live Music Operations

The economic impacts of live music companies' operations in Canada are significant. As discussed above, live music companies spent an estimated \$1.65 billion in 2023; the total GDP impact of this expenditure is an estimated \$2 billion. According to Statistics Canada, the national contribution from all culture and sport in 2023 was \$60.8 billion⁵¹, implying that live music operations contributed approximately 3.3% of Canada's culture and sport GDP impact.

Other economic impacts of live music company operations are summarized in the table below.

TABLE 7:
Economic Impacts of Live Music in Canada in 2023

	Direct Impact	Indirect Impact	Induced Impact	Total Impact
Employment	27,490	77,150	101,640	27,490
Labour Income	\$479,576,000	\$475,844,000	\$213,249,000	\$1,168,669,000
Gross Domestic Product	\$712,598,000	\$813,512,000	\$473,888,000	\$1,999,998,000

Source: MyEIA™

51 Statistics Canada. 2024. ["National culture and sport indicators by domain and sub-domain."](#)

The total labour income impact of live music company operations in Canada was an estimated *\$1.17 billion* and the total employment supported by these operations is an estimated *27,490 FTEs*. Live music company operations directly employ *15,350 FTEs* and support *12,140 indirect and induced FTEs*.

Live music company operations also contribute fiscal impacts, as summarized in the table below.

TABLE 8:
Fiscal Impacts of Live Music in Canada in 2023

	Federal (\$)	Provincial (\$)	Total (\$)
Personal Income Taxes	170,532,000	103,550,000	274,082,000
Corporation Income Taxes	48,159,000	30,587,000	78,746,000
Consumption Taxes	46,087,000	64,786,000	110,873,000
Local Property Taxes and Other Fees	0	49,836,000	49,836,000
Total	264,778,000	248,759,000	513,537,000

Source: MyEIA™

Live music companies contribute to tax revenue at the federal and provincial levels. Personal income taxes, corporation income taxes, consumption taxes, local property taxes, and other fees together contributed an estimated \$264.78 million at the federal level and \$248.76 million at the provincial level, yielding an estimated **\$513.54 million in total fiscal impact** in 2023.



West End Cultural Centre by Matt Duboff-Faouzia

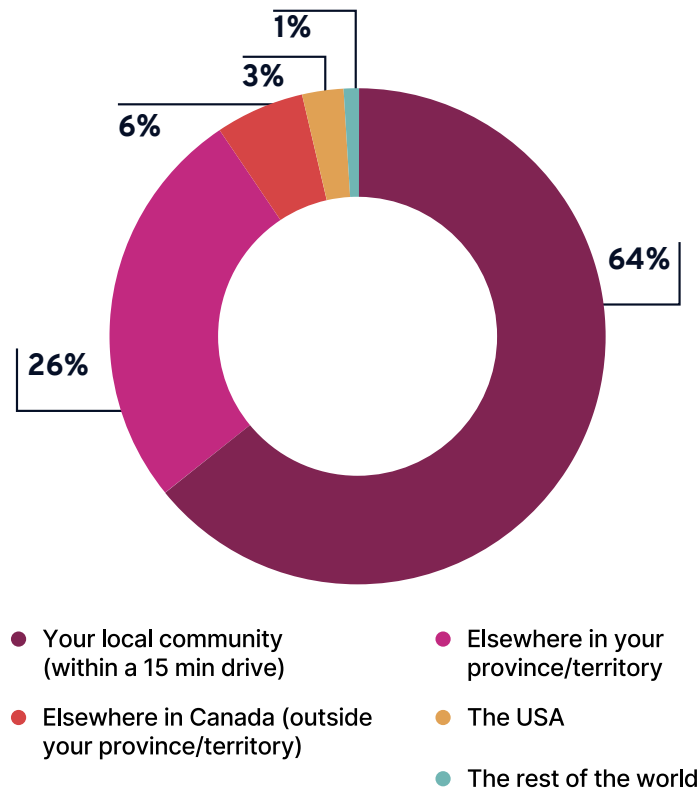
4.2 Economic Impacts – Tourism

Live music in Canada is a driver of tourism. The spending associated with live music tourism represents significant economic impacts.

The majority (64%) of people who attend live music events do so within their local community, and 36% travel from outside of their local community to do so. Of that 36% who travel to live music events, the majority travel within their own province or territory. Overall, an estimated 4% of attendees at live music events in Canada travelled internationally to do so, and 6% travel interprovincially.

The chart below provides a summary of where live music event attendees travel from.

FIGURE 15:
Origin of Attendees for Canadian Live Music Events



n=182
Source: Nordicity, Hear and Now Survey

Live music festivals and live shows at venues in Canada together saw a total of 19.7 million non-local visitors.

LASSO Montréal by Frédérique Ménard-Aubin





In 2023, it is estimated that live music festivals and live shows at venues in Canada together saw a total of 19.69 million non-local visitors. Using the above provenance statistics, it is estimated that 0.55 million were international visitors, 1.47 million were visitors from the United States,

3.18 million travelled interprovincially, and 14.50 million travelled intra-provincially.

Visitors spend money while travelling. Using a combination of survey data and statistics available through the National Travel Survey, the Visitor Tourism Survey, and the National Tourism Indicators, visitor spending associated with live music tourism is estimated to be \$9.90 billion in 2023, or approximately 10.8% of total tourism expenditures in Canada for the year.⁵²

The table below provides a breakdown of this figure in terms of spending on food and beverage, accommodations, transportation, culture and recreation, and other expenses.

TABLE 9:
Visitor Spending Attributable to Live Music in Canada, 2023 (x 1000)

	Food and Beverage (\$)	Accommodation (\$)	Transportation (\$)	Culture and Rec (\$)	Other Expenses (\$)
International visitors	260,380	266,686	180,193	81,087	112,621
US Visitors	227,685	266,539	101,020	69,937	111,900
Interprovincial visitors	252,599	262,939	302,823	73,859	584,966
Intraprovincial visitors	1,152,887	1,200,081	1,382,116	337,102	2,669,844
Sub-totals	1,893,550	1,996,246	1,966,153	561,985	3,479,330
Total	9,897,265				

Source: Nordicity, Hear and Now Survey; National Travel Survey; Visitor Tourism Survey; National Tourism Indicators Note: Numbers may not sum exactly due to rounding

The economic impacts of this tourism spending are significant, with an estimated total GDP impact of \$8.92 billion. Other economic impacts of live music related tourism spending are summarized in the table below.

⁵² Statista. 2024. ["Tourism expenditure in Canada from 2010 to 2023."](#)

TABLE 10:
Economic Impacts of Live Music Related Tourism Spending

	Direct Impact	Indirect Impact	Induced Impact	Total Impact
Employment (FTEs)	41,780	20,900	14,470	77,150
Labour Income	\$2,202,809,000	\$1,537,857,000	\$929,544,000	\$4,670,210,000
Gross Domestic Product	\$3,407,464,000	\$3,443,429,000	\$2,065,653,000	\$8,916,546,000

Source: Nordicity, customized tourism EIA model

The total labour income impact of live music related tourism spending in Canada was an estimated \$4.67 billion and the total employment supported is an estimated 77,150 FTEs. Live music related tourism spending directly employs 41,780 FTEs, and supports 35,370 indirect and induced FTEs.

Live music related tourism spending also contributed to fiscal impacts, as summarized in the table below.

TABLE 11:
Fiscal Impacts of Live Music Related Tourism Spending

	Federal (\$)	Provincial (\$)	Total (\$)
Personal Income Taxes	681,478,000	413,803,000	1,095,281,000
Corporation Income Taxes	245,991,000	156,234,000	402,225,000
Consumption Taxes	809,864,000	684,649,000	1,494,513,000
Local Property Taxes and Other Fees	0	222,185,000	222,185,000
Total	1,737,333,000	1,476,871,000	3,214,204,000

Source: Nordicity, customized tourism EIA model



Photo courtesy of Commonwealth Bar & Stage

Notably, the World Travel and Tourism Council is forecasting historically high tourism industry activity for 2024, with domestic and international visitors expected to spend a combined total of \$139 billion.⁵³ This finding, when combined with live music companies' expectation that their 2024 revenue has grown compared to 2023, reasonably suggests that 2024 tourism spending related to live music is likely to be even higher than \$9.9 billion – which in turn implies that the 2024 economic impacts from tourism related to live music are likely to be even higher as well.

53 WTTC. 2024. "[World Travel and Tourism Council](#)."



Bass Coast Festival by Ron Worobec

The background image is a photograph of the interior of the Orpheum Theatre. The architecture is highly ornate, featuring a large, vaulted ceiling with intricate carvings and a series of arched windows. The stage is visible in the distance, where a live band is performing. The audience is seated in the foreground, filling the lower half of the frame. The lighting is warm and ambient, highlighting the architectural details and the crowd.

Section V:

**STRENGTHS,
CHALLENGES, TRENDS,
AND NEEDS OF LIVE
MUSIC IN CANADA**

As evidenced throughout this report, live music is a unique segment of the music industry, one that is intricately connected to tourism, resulting in strong community and economic impacts. However, the industry is not without its ongoing challenges, facing threats to its continued growth and its contribution to the Canadian economy.

5.1 Strengths

In addition to the impacts discussed throughout this report, several unique high-level strengths of Canada's live music industry emerged through roundtable discussions and the national survey. These strengths include: a diversity of talent and genres, resilience and adaptability, community and collaboration, professional development and a supportive ecosystem, and international recognition and success. The following subsections describe these strengths, building upon insights gleaned through those roundtable discussions and responses to the national survey.

5.1.1 Diversity of Talent and Genres

The Canadian live music landscape thrives on its rich reservoir of local talent, where musically and culturally diverse artists emerge from communities across the country to find domestic and international success. Canada's live music scene is noted for its range of musical genres and cultural influences, driven by multiculturalism, and a variety of musical traditions from Indigenous, Black, immigrant, and



other culturally diverse communities. Many of these incredible talents find domestic and international success. Not only is this industry diversity important to capture the full range of cultural expression that exists in Canada, but as several roundtable participants noted, it is important for all people to see themselves represented in live music. Empowering the plethora of cultural communities to find and create new roles in the industry – such as by supporting Black and Indigenous-owned record labels and artist management firms – helps to increase access and participation in the music industry. This approach builds capacity within those communities, fostering a more inclusive and sustainable industry landscape.

Empowering diverse communities to find and create new roles in the industry – such as by starting Black and Indigenous-owned record labels and artist management firms – helps to increase access and participation in the music industry. This approach builds capacity within those communities, fostering a more inclusive and sustainable industry landscape. While certain styles of music might be assumed to be the primary domain of specific regional music scenes (e.g., country music in Alberta, folk music in Atlantic Canada, francophone music in Quebec), in reality, these boundaries are shifting and disappearing over time. Immigration and cross-provincial mobility contribute to a broadening spectrum of sounds and influences in all parts of Canada, as newcomers settle in their new communities and enrich the local scene. Festivals and events across the country also highlight an increasingly wide array of Canadian artists spanning multiple genres. A festival like Ottawa Bluesfest booking more folk, indie rock, country, jazz fusion, and hip-hop artists reflects an evolution in what is traditionally put on stage at mainstream festivals and events.⁵⁴



54 CBC. 2024. "Neil Young, Nickelback, Maroon 5 playing 2024 Ottawa Bluesfest."

This eclectic mix not only nurtures a vibrant ecosystem where artists can experiment and collaborate across genres, but also has broad audience appeal. Festivals connect artists with (new) audiences – a critical factor to advancing their career. Artist development contributes to the sustainability and growth of jobs across the whole live music industry.

The accessibility of music production and music discovery tools is also leading to a proliferation of new sounds and styles from a mix of DIY and mainstream artists. Nevertheless, Canada's vast and diverse geography also means that music will often be characterized by a strong sense of place and belonging, whereby artists will seek to maintain their unique regional identity. This deep connection to community enhances the authenticity and regional diversity of Canadian music. The unique blend of cultural identities, landscapes, and regional variations in Canada contributes to a distinctive music ecosystem that reflects the country's diversity and the diversity of the industry.

5.1.2 Resiliency and Adaptability

As noted in industry roundtables, the Canadian live music community is a uniquely resilient group in the face of persistent challenges. From public health and climate emergencies to financial pressures and dwindling availability of established music spaces, live music workers are continually striving to find ways to adapt to changing conditions and make things happen to sustain their industry.

The COVID-19 pandemic forced live music workers to embrace huge and immediate innovation in order to preserve their livelihoods, including reconfiguring live music venues for public health safety measures, shifting events to online or outdoor spaces, and launching national campaigns to protect venues such as the #ForTheLoveOfLIVE campaign. Live music workers, live music companies, and artist entrepreneurs financially rebounded after the pandemic, continuing to find ways to earn revenue, drive output, and contribute heavily to the economy – as evidenced by the estimated \$1.17 billion in labour income, \$2 billion in GDP, \$514 million in fiscal impacts, and over 27,000 full-time equivalent jobs in 2023 (see section 4). The steadily increasing revenue seen in recent years and the forecasted increases in the future is indicative of a live music industry that navigates difficult and evolving circumstances and embraces innovation.



Similarly, as climate emergencies increase in frequency and scale, live music workers are proactively developing mitigation plans to safeguard their operations while embracing more climate sensitive practices.

Similarly, as climate emergencies increase in frequency and scale, roundtable participants noted that live music workers are proactively developing mitigation plans to safeguard their operations while embracing more climate sensitive practices. For example, Under The Stars Music Festival in British Columbia's Okanagan Valley has been moved forward from the August window to a May and June window, when fire risk is lower.⁵⁵ Meanwhile, other festivals like Hillside Festival in Guelph and Mariposa Folk Festival are adding climate resilient measures like solar charging and water stations.^{56, 57}

Some live music workers are responding to rising costs with measures to help make live music more accessible and/or their touring activities more cost-feasible, such as touring with smaller teams, touring to fewer smaller markets, and introducing sliding scale pricing models for tickets to shows. Others are adding even more to their plate to sustain themselves using their existing industry skills, taking on roles as music teachers, event planners, social media managers, and graphic designers, or starting new businesses that serve the industry.

Geographically, Canada's vastness presents logistical challenges for touring, yet it fosters vibrant local scenes and supportive networks that encourage collaboration and creativity. Industry roundtable discussions revealed that the sense of resiliency and adaptability is particularly evident in rural regions, where infrastructure and industry presence may be limited but a spirit of resourcefulness and collaboration thrives. The increasing adoption of DIY music spaces and house shows also reflects a grassroots, community-based approach to sustaining live music in an ever-evolving landscape.

55 KNKX. 2023. "[Amid wildfires, music events reassess safety and sustainability.](#)"

56 Hillside Festival. "[Hillside Festival – Green Initiatives.](#)"

57 Mariposa Folk Festival. "[Greening Mariposa.](#)"

5.1.3 Community and Collaboration

Live music in Canada is marked by a strong sense of community, collaboration, and mutual support among artists, music professionals and music spaces, even across the country's vast geography. Industry roundtables revealed that music professionals in all corners of Canada share many of the same practical challenges and opportunities, such as Canadian geography, venue availability, and emerging discovery tools, which all contribute to a sense of common experience. Industry associations, local venues, and other convening spaces help to build a robust network of music professionals across the country.

Industry roundtable participants spoke at length about the collaborative spirit embodied by musicians and music workers, and how it further enhances this sense of community. Musicians and music workers contribute vital, though often undervalued, support to local life through performances, workshops, and community engagement, making live music an integral part of community identity and involvement. Meanwhile, festivals and live shows help to foster social cohesion by way of the celebration of local music and shared cultural identity.

At a broader community level, industry roundtable participants noted that live music can serve as a catalyst for community connections, fostering a sense of greater understanding among different culturally diverse groups through shared experiences at events. In local communities, festivals and performances are often tailored to certain communities or audiences, reflecting their unique interests and identities. Local pride is evident in the active support for homegrown events and artists, particularly in less populated areas of the country, creating a vibrant atmosphere that prioritizes community values. This local focus creates a symbiotic relationship between artists and audiences, where shared experiences and collective memories become the backbone of community identity.



5.1.4 Professional Development and Supportive Ecosystem

As shared in roundtables and Hear and Now Survey findings, the live music industry in Canada benefits from a robust supportive ecosystem that seeks to develop new artists and music workers. Between government bodies, industry associations, major music corporations and individual music businesses and spaces, steps are being taken at various levels of the live music industry to ensure that talented musicians and music workers advance in their careers and fill emergent gaps in the labour pool.

The live music funding landscape is predominantly made up of federal funding bodies (e.g. FACTOR, Musicaction, Canadian Heritage, and the Canada Council for the Arts), provincial and territorial cultural and creative industry funders (e.g., Creative BC, Ontario Creates, SODEC), provincial and territorial arts councils and arts development agencies (e.g., Ontario Arts Council, Alberta Foundation for the Arts, Arts Nova Scotia), and private sector programs (e.g., the Canadian Starmaker Fund, RBC Emerging Artists Project). The breadth of funding support provided by these bodies is unique, especially when compared to the American market which provides less funding overall for a population of nearly ten times the size of Canada.⁵⁸

58 The Philanthropist Journal. 2019. "[A balancing act: Supporting the arts in Canada.](#)"

Live music in Canada is marked by a strong sense of community, collaboration, and mutual support among artists, music professionals and music spaces, even across the country's vast geography.



This level of funding gives Canadian artists a leg up in an increasingly globalized industry. Furthermore, the existence of Canadian content requirements and new enforced contributions to cultural funds supporting artists – in the wake of the Online Streaming Act (Bill C-11) – give Canadian artists a competitive advantage over their international counterparts in achieving a domestic following.⁵⁹

There are a number of professional development opportunities cropping up in the live music industry. As one example, Canada's Music Incubator provides a number of programs and mentorship opportunities for music managers and artists alike.⁶⁰ Meanwhile, less formal professional development activities are taking place in live music spaces across the country as noted by industry roundtable participants. Established sound technicians in local venues are seeking to mentor emerging professionals and pass on their skills. Festivals and artist showcases not only provide opportunities for artists to reach new audiences, but also serve as critical networking opportunities for artists and industry professionals. Industry organizations and record labels run a wide array of artist development programs designed to nurture musicians and support their career development. Collectively, these elements create a supportive environment that encourages growth and continuity within Canada's live music community.

59 SOCAN. 2023. "[Bill C-11 passed. Now what?](#)"

60 For more information, please visit: <https://canadasmusicincubator.com/about-us/>

Photo courtesy of Canadian Music Week



5.1.5 International Recognition and Success

Canadian artists – from Neil Young and Shania Twain to Deborah Cox, Robbie Robertson, The Weeknd and beyond – have a long legacy of successfully reaching into international markets. Roundtable participants noted that they perceive Canadian artists and music workers to punch above their weight in international music markets, a perception that is validated by research from Music Canada showing that Canadian artists rank third in worldwide streams of the top 1000 singles, behind only the US and UK.

Canadian artists' export efforts benefit significantly from their proximity to the United States. Though proximity comes with an inherent risk of seeing the distinct qualities of Canadian music being absorbed into the more dominant American market, roundtable participants offered that this geographic closeness is generally an advantage, particularly from a touring perspective. While cost can be prohibitive for some Canadian artists to cross the border and tour in the United States, many artists benefit from grant programs from Canadian funding bodies aimed at breaking into international markets and supporting these live touring activities, which serve as vital pathways for gaining recognition beyond Canada.

This international reach also extends beyond established mainstream commercial music acts. The annual Indigenous Music Summit in Canada, for example, serves as a one-of-a-kind convening event for the global Indigenous music community. The success of this summit is a clear indicator of the strength of the local Indigenous music industry to reach beyond Canadian borders and set a powerful example for Indigenous music communities around the world.

5.2 Challenges & Trends

While the live music industry has many strengths and provides significant contributions to Canada's social fabric and economy, it is also must contend with a number of shifts and trends. These shifts include increased financial pressures, changing audience behaviours, environmental sustainability concerns, and digital shifts and the rise of artificial intelligence.

5.2.1 Financial Pressures

The live music industry in Canada faces a variety of financial pressures that are reshaping its landscape and creating new challenges. These pressures can be grouped into three main areas: economic challenges, shifts in market dynamics, and labour and industry sustainability. Each of these areas presents specific obstacles that influence the ability of artists, venues, and organizers to adapt and succeed in this evolving environment. If addressed, it is imagined that the live music industry could provide even greater economic returns.

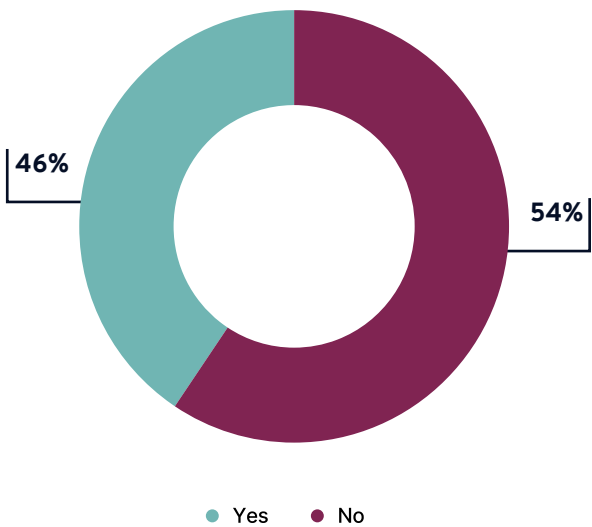
Economic Challenges

As noted by survey respondents and industry roundtable participants, the rising cost of living is making it increasingly difficult for artists and music professionals to maintain their careers, especially in major markets like Toronto, Vancouver, and Montreal. As a result, many artists are struggling to afford to live in the very cities that are central to Canada's music scene. However, this challenge has a silver lining. As many artists leave major urban centres, the industry is becoming more decentralized. This shift is helping smaller cities develop stronger, burgeoning live music scenes.

At the same time, the industry grapples with rising operational costs, with many festivals and events still recovering from the financial deficits caused by the pandemic. This recovery is made more difficult by the ongoing pressures of inflation and declining support from corporate sponsorships and government funding. These economic pressures create a challenging environment for maintaining sustainable operations in live music.

Public funding forms a critical support for the Canadian live music industry at present. According to national survey findings, the majority (54%) of companies, organizations, and artists relied on public grants to subsidize at least part of their revenue in 2023 (see Figure 20).

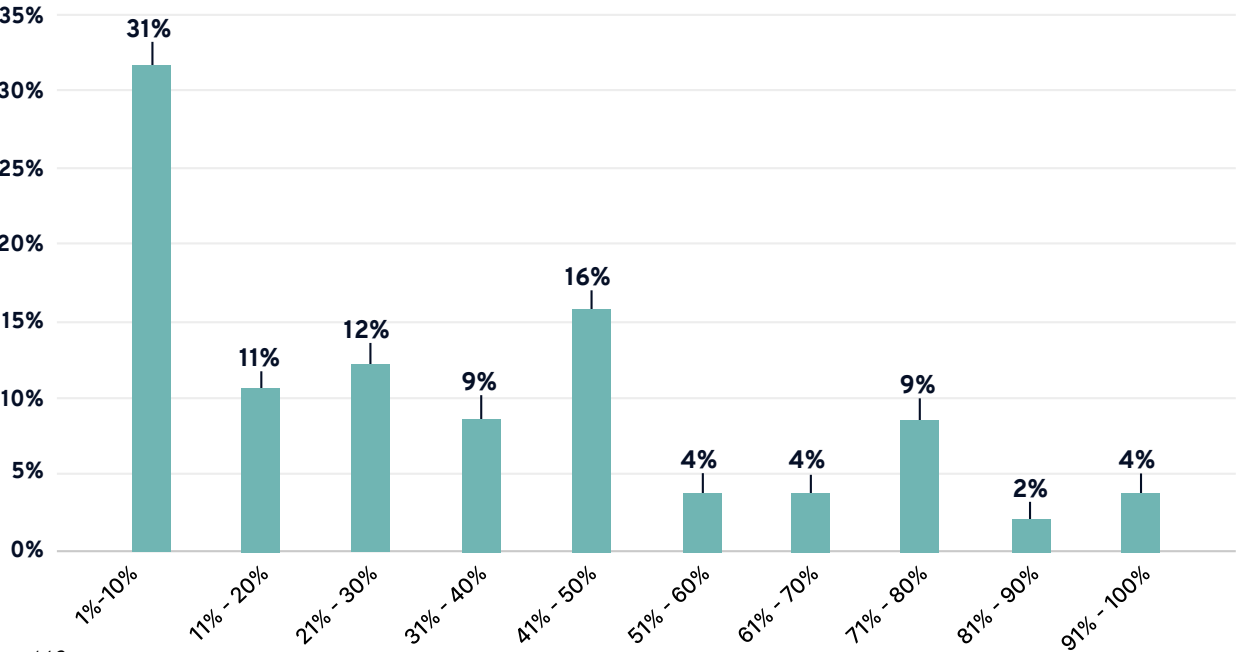
FIGURE 16:
Companies and Artist Entrepreneurs Receiving Grants in 2023



n=264
Source: Nordicity, Hear and Now Survey

Of those that do use grants, 79% use grant funding to cover up to half of their revenue (see Figure 17).

FIGURE 17:
Portion of 2023 Revenue from Grants

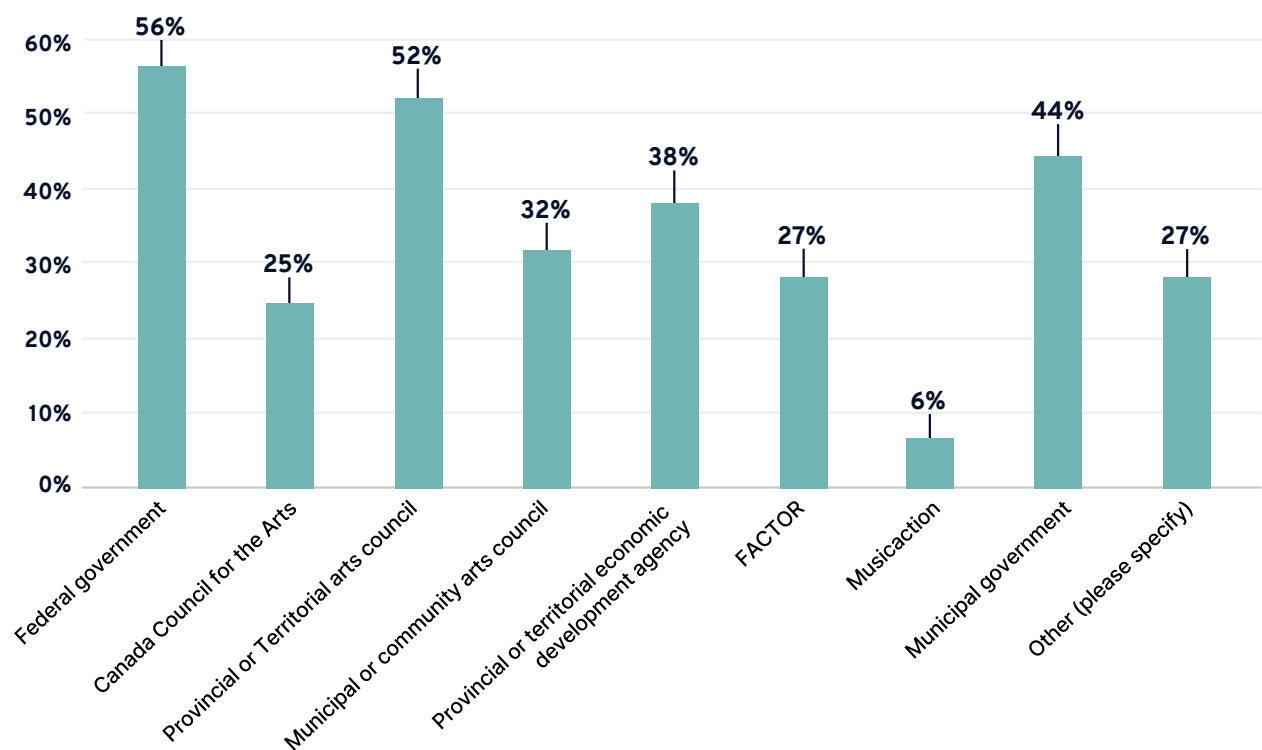


n=140
Source: Nordicity, Hear and Now Survey

The grant funding most typically accessed spans all levels of government, with respondents most frequently noting the federal government (56%), provincial or territorial arts council (52%), and municipal governments (44%) as the sources of their grant revenue in 2023 (see Figure 22). While also federal sources of funding, respondents less frequently selected FACTOR (27%) and Musicaction

(6%), although both are dedicated music funds. The Canada Council for the Arts was also less frequently selected (25%) despite offering funding streams for music activity. Distinct from arts councils, provincial agencies were also not noted as a popular channel for live music funding (responses for this type of funding was encompassed in the ‘Other’ category).

FIGURE 18:
Sources of 2023 Grant Revenue



n=140
Source: Nordicity, Hear and Now Survey

While Canada is home to a strong public funding ecosystem that the live music industry regularly taps into, a lack of live-music funding support remains a key challenge noted by the industry. In the wake of new financial pressures, including increased operational expenses, public funding has generally stagnated. Across the industry, artists, companies, and organizations are having to compete for the same or smaller pools of grant funding, leading to increased competition and decreased revenue from public funds. With artists relying on live music as a core source of income, a lack of funding support to specifically meets the needs of the industry is a key challenge.

One on hand, some survey respondents and industry roundtable participants express that the live music industry in Canada tends to be overly reliant on public funds. To promote the longterm sustainability of artists, businesses, and organizations in Canada, it is believed by some that grant support should exist to help incubate and kick-start new initiatives rather than be viewed as a continued revenue stream. To mitigate this reliance on public funds, there is a need and opportunity for live music to more effectively tap into the private sector, such as by leveraging sponsorships and exploring strategic partnerships.

On the other hand, the industry notes an ongoing need to support venue development, artist development, festivals, market access, environmental initiatives, as well as equity initiatives.

Shifts in Market Dynamics

Shifts in market dynamics further compound the difficulties for live music. Industry roundtable participants noted that the necessity to increase ticket prices driven by rising costs, risks deterring audiences and limiting accessibility to live performances. Audience behavior has also shifted, with many becoming more selective about which events they attend. This change is influenced by a mix of financial pressures and lingering safety concerns, leading to lower turnout at concerts and festivals – especially small or medium scale ones.⁶¹ Moreover, in challenging economic times, live music often falls under discretionary spending that households cut back on first. While demand is beginning to rebound, continued economic hardship is keeping levels from flourishing.

Additionally, industry roundtable participants note that there is an increasing number of festivals and live events, which has intensified competition, and made it especially hard for smaller venues and events to attract sufficient audiences to remain viable. This trend perhaps points to a need for greater collaboration and resource sharing among the festival and event ecosystem, and a need to support the sustainability of venues.

61 Global News. 2024. [“What’s behind the lack of enthusiasm for this year’s music festivals?”](#)



Sask Jazz Festival by Nathan Janzen

55% of survey respondents selected “funding support” as one of the industry’s top challenges.

Labour and Industry Sustainability

Lastly, labour and industry sustainability remain critical challenges. Labour and programming costs represent the highest expenses for live music companies in Canada at 29% and 18% respectively (see Table 4) (and thus, represent a sizeable portion of the industry’s overall economic impact), and the skilled labour force is paramount to its success. However, labour shortages are a persistent issue, as many workers who left the industry during the pandemic have not returned, leading to staffing challenges and operational constraints (see 5.3.3 for further discussion on capacity building). Survey respondents and industry roundtable participants noted that the high cost of living in key music markets not only affects established professionals but also limits opportunities for emerging artists to gain a foothold in the industry. With fewer affordable living options in key cultural hubs, the pipeline for new talent is squeezed, diminishing diversity and innovation in the music scene. At the same time, venues and promoters across the industry are more sensitive to risk in the current economic climate, reducing their willingness to take chances on emerging talent. This risk adversity further stifles growth and limits the introduction of fresh voices to the scene. These factors combined threaten the long-term sustainability and vibrancy of the live music industry in Canada.

5.2.2 Shifting Audience Behaviour

Audience behaviors are shifting significantly, impacting the future of live music and events. One notable trend is the decline in alcohol consumption, particularly among younger generations like Gen Z, which has traditionally been a steady revenue stream for live venues.⁶² Industry roundtable participants noted that the decline in alcohol sales is a worrisome trend for their ongoing sustainability.

While major acts demonstrate that there is still a market for live performances, audience spending is becoming more selective, with audiences focusing only on events they consider worth their investment. The high prices of tickets for these top-tier acts often strain fans' budgets, reducing their capacity to attend mid-range or smaller events, contributing to a more polarized spending pattern.⁶³ This trend has led to further market oversaturation, with many tours competing for audience attention, even as fans become more discerning in their choices.

Another key trend noted by industry roundtable participants is the decreased urgency or "fear of missing out," especially after the pandemic, resulting in fewer shows and shorter runs. Audiences now tend to "nibble" at cultural experiences, preferring one-day tickets over fullweek passes or festival subscriptions. Additionally, there is a growing trend of last-minute ticket purchases, making it difficult for event organizers and artists to predict attendance and manage financial planning effectively.⁶⁴ These changes pose challenges for the live event industry as it navigates a more cautious and selective audience base.

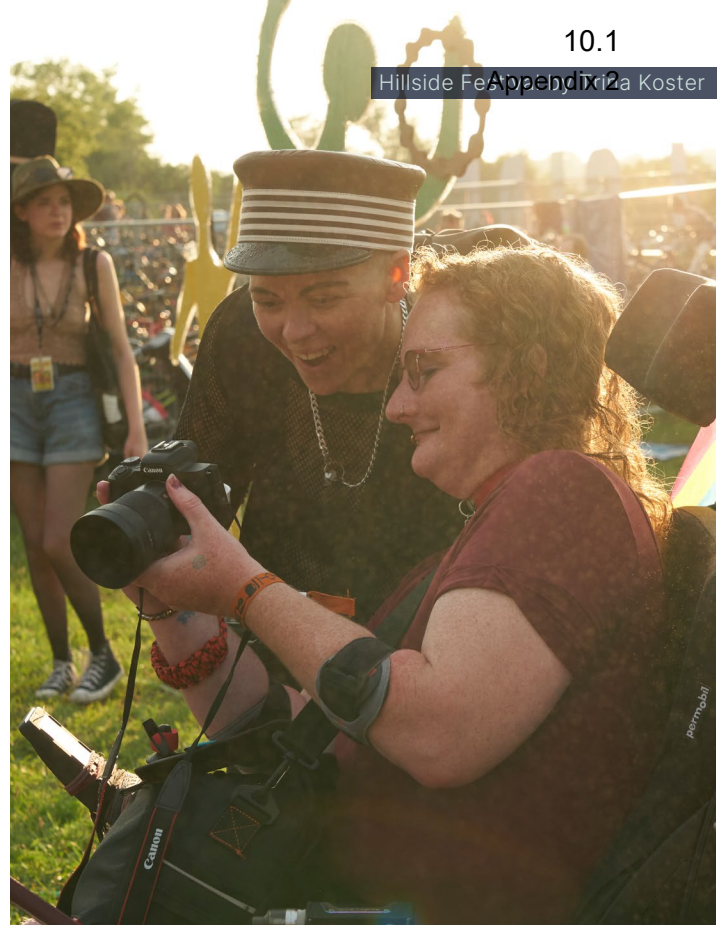
5.2.3 Environmental Sustainability

There is growing environmental concern across the industry as major climate events, such as forest fires in Western Canada, flooding rain, and other severe weather conditions, are becoming regular occurrences. For many live events – especially outdoor events – weather conditions are a key determinant of whether their event can move forward and thus have significant impacts on their

62 Forbes. 2023. "[Why GenZ Is Drinking Less and What This Means for the Alcohol Industry.](#)"

63 Global News. 2024. "[2024 was supposed to be a great summer for live music. It's not turning out that way.](#)"

64 Hive. 2024. "[From last minute to first in line: navigating late ticket buyers.](#)"



Labour and programming costs represent the highest expenses for live music companies in Canada and the skilled labour force is paramount to its success.

However, labour shortages are a persistent issue, as many workers who left the industry during the pandemic have not returned.

outlook and operations.⁶⁵ As a result, festivals and events in particular are having to navigate a number of environmental complexities and enhance their contingency planning. However, while an important issue, industry roundtable participants noted that it is difficult to prioritize eco-responsibility and budgeting for contingencies with mounting financial pressures and dwindling resources. Accepting sponsorships can also present a conundrum for live events if those businesses do not align with their environmental sustainability goals.

Overall, there are broad calls across the industry from within the industry and from audiences for more funding and support to help advance environmental practices in all live events. Several Canadian music festivals are leading the way in this space, integrating various sustainability practices into their operations. A strong example is Hillside Festival in Guelph, Ontario, which won an International Clearwater Award in 2019 for their environmental efforts, including: creating a “living roof” atop their Main Stage; using reusable dishware and glassware; installing “trash turnaround” waste diversion stations; and offering subsidized shuttle busses and free water stations.⁶⁶ Moreover, a number of organizations in Canada are committed to shifting the needle when it comes to tackling environmental issues in music.⁶⁷

One of the largest contributors to live music’s environmental footprint is touring.⁶⁸ With artists travelling around Canada and outside the country, and audiences flying out to see their favourite acts, the industry continues to look at ways to decrease touring’s impact on the environment. This increased awareness is leading to the rise of slow tourism, which is the practice of artists situating themselves in a specific area for an extended period rather than visiting for one or two shows.

It could mean an artist performs multiple shows in one location and explores other opportunities to engage with local audiences through workshops and popup appearances. There are multiple benefits to slow tourism beyond a sustainability standpoint. For one, it is beneficial for artists’ well-being, allowing them to feel grounded in a place and reducing the pace of a tour. It also can be beneficial for audience development since it allows artists to engage more

deeply by spending longer periods in a given location. Slow tourism also entails taking slower modes of transportation, such as public transit and trains over planes. However, in Canada, this aspect of slow tourism can prove difficult given the widespread geography of the country.

5.2.4 Digital and the Rise of Artificial Intelligence

Emerging digital technology and its role in live music events continues to be a major topic of discussion across the industry. Spurred on by the constraints of COVID-19, live events are continuing to experiment with the use of augmented reality (AR) and virtual reality (VR) to amplify in-person experiences, and to share the live experience with audiences at-home.⁶⁹ By providing VR experiences, live events can help connect audiences across Canada and beyond through a single experience, bridging the geographical divide. However, at present, the use of this technology is limited to larger event organizers who have the budget available for this level of experimentation.

The rise of artificial intelligence (AI) also continues to both excite and concern many industry players. AI is expected to greatly enhance live sound engineering and could be an incredible tool for audio engineers by providing quick troubleshooting assistance, and adjusting the balance and mix of a live event with increased ease. Additionally, AI may also help create and sync concert visuals and effects, such as lighting and projections, to create a more immersive experience for audiences.⁷⁰ While AI has great potential, there is concern that it may also have adverse effects, including putting certain roles and jobs in the industry at risk.

69 AR Insider. 2023. “[How are Immersive Technologies Revolutionising the Music Industry?](#)”

70 TSE Entertainment. 2024. “[How AI Could Revolutionize Live Music Concerts.](#)”

65 CBC. 2024. “[Drought, wildfire concerns impact B.C. summer events.](#)”

66 Hillside Festival. “[Hillside Festival – Green Initiatives.](#)”

67 An up-to-date list on the number of organizations actively pursuing sustainability practices in live music is available on the [Sustainability Hub](#) on the CLMA’s website

68 Nature. 2024. “[Live music is a major carbon sinner—but it could be a catalyst for change.](#)”

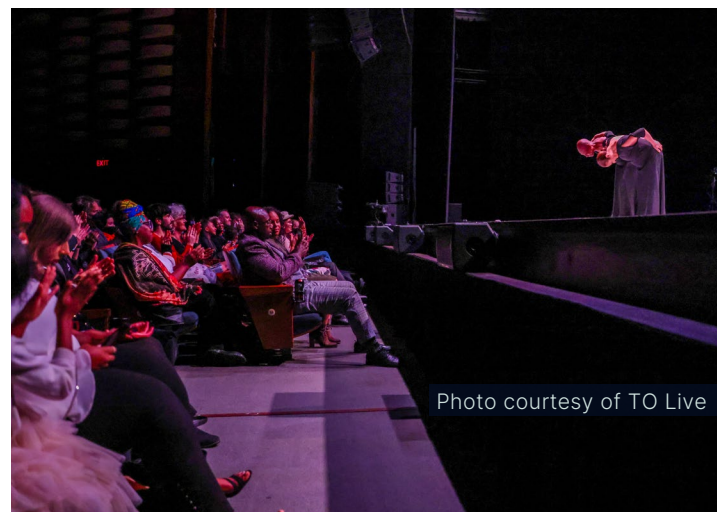


Photo courtesy of TO Live

Top challenges recorded by national survey respondents included: “availability of venues” at 47% and “availability of working and/or rehearsal spaces” at 38%.

5.3 Needs

To support a positive future outlook for Canada’s live music industry and its potential for even greater economic returns, there are a few pressing needs. Research and engagement findings revealed key needs around protecting and strengthening venues and rehearsal spaces, enhancing representation and safety, supporting talent development and capacity building, and improving compensation and working conditions.

5.3.1 Venues & Rehearsal Spaces

Live music venues and rehearsal spaces are a key part of the live music ecosystem; venues in particular, by virtue of their high expenditures, contribute significantly to live music’s overall economic impacts in Canada. The ongoing closure of live music venues is a critical challenge for Canada overcome to ensure a thriving live music ecosystem.

The disappearance of live music venues across Canada was exacerbated by the COVID-19 pandemic, but not solely attributable to those pandemic challenges. In Toronto, while approximately 15% of venues closed permanently in 2020-2021,⁷¹ the city was already losing more than one venue per month between 2017 and 2019.⁷² Similar challenges are being felt in music markets across the country, where rising operating costs and redevelopment pressures – compounded by the impact of the COVID-19 pandemic – have led to the current crisis point for live music venue and rehearsal space shortages.

As the high cost of housing continues to drive policy and market decisions, neighborhoods that were once creative and cultural hotbeds are seeing a steep increase in redevelopment activities, which is taking a toll on the dedicated venues, bars, restaurants, parks, and other live music spaces in those communities. In urban centres, gentrification pressures are slowly pricing venues out of their communities, often resulting in the demolition of many stalwart music spaces. Industry roundtable participants note that very few small and medium-sized live music venues own the buildings in which they operate, particularly in the largest music markets, making them susceptible to real estate activity. Moreover, there are fewer independent venues operating across Canada.⁷³ The critical shortage of small and mid-sized venues restricts access to local live music for artists and audiences, and creates a barrier to artist development as early-career artists are faced with fewer rightsized places to play.

71 City of Toronto. 2022. “[Music Industry Strategy: 2022-2026](#).”

72 Spacing. 2019. “[Vanishing Venues: New Funding Models Favour Festivals Over Small Music Clubs](#).”

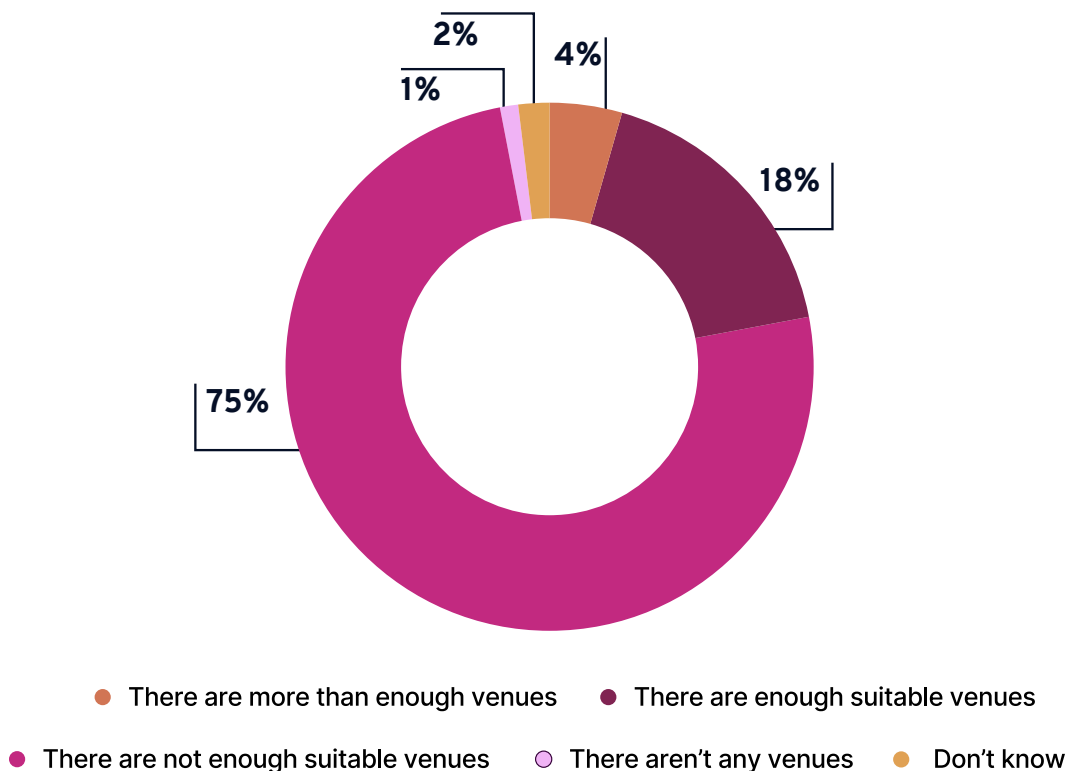
73 CBC. 2023. “[Where have all the small concert venues gone?](#)”



Photo courtesy of Under the Spire Music Festival

In addition to a general shortage, 75% of survey respondents reported that there are not enough suitable venues in Canada (see Figure 23).

FIGURE 22:
Rating the Availability of Suitable Venues for Emerging Artists in Canada



n=426

Source: Nordicity, Hear and Now Survey

Industry roundtables also indicated that there is a lack of affordable and diverse performance spaces, and that most music venues are bars and restaurants while there are few music-first spaces. It was noted that bars and restaurants, given the presence of alcohol, are not necessarily inclusive for artists and audiences of all ages and cultures.

Across the country, there have been moves to explore more non-traditional music spaces. However, research supports that there is a strong need for continued, concerted efforts to nurture the development of new and burgeoning music spaces, and to protect existing music-first venues as the lifeline of the industry.

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“To shift who is on-stage, we have to shift what is happening off-stage”

- Roundtable participant

5.3.2 Representation & Safety

The live music industry faces significant challenges related to representation, particularly regarding a lack of diversity in key gatekeeping roles such as agents, promoters, and venue operators. The absence of Indigenous, Black and racialized people in these positions affects mentorship opportunities, by making it difficult for aspiring diverse workers and artists interested in live music from seeing themselves reflected in the industry.

As one example, industry roundtable participants noted that there is a severe lack of Black artist agents in Canada, which in turn can make it difficult for Black artists to feel adequately understood, supported, and represented. This fact is supported by research from ADVANCE, Canada’s Black Music Business Collective, who found that while nearly half of artists come from underserved communities, almost 80% of agents who represent them and manage their careers are white.⁷⁴ As another example, aspiring Black individuals looking to start their own booking agencies face significant obstacles due to limited networks and opportunities. Many existing agencies are often overwhelmed and unable to provide meaningful mentorship, leaving newcomers feeling isolated. Even when agencies are hiring, some in the industry note there is skepticism regarding their commitment to supporting diverse candidates effectively. This perpetuates a cycle of underrepresentation that limits opportunities for non-white artists and workers.

⁷⁴ ADVANCE, Diversity Institute. [Industry Analysis & The Value of Black Music](#).

Moreover, roundtable participants noted that the industry is not fully prepared to accommodate 2SLGBTQ+ and gender-diverse individuals. There is a pressing widespread need for infrastructure that supports gender diversity, such as gender-neutral bathrooms, safe green rooms, appropriate lighting, accessibility measures, and generally inclusive, welcoming spaces for artists, their touring teams, and audiences. The industry noted that venues need to continue taking visible steps to promote inclusive and safe spaces, including through clear signage and thoughtful accommodations.

Across the industry, there continues to be an urgent need to address the systemic barriers faced by IBPOC individuals, and members of the 2SLGBTQ+ community, through more targeted funding support, mentorship programs, and accelerators. Focusing on improving representation within the industry, and cultivating inclusive spaces where people feel safe and welcome, are critical steps towards a more equitable, diverse, and thriving live music ecosystem.

5.3.3 Talent Development & Capacity Building

The live music industry as a whole is currently facing a significant talent drain to larger markets, stunting the vitality and development of local scenes. Roundtable participants noted that many artists and live music workers are leaving their communities for access to more opportunities. This exodus is being experienced across the country, but especially in smaller regions and cities, with many artists and live music workers leaving for larger urban hubs within Canada or the United States. Additionally, industry stakeholders in smaller, more remote areas – like Northern Canada – note that it is difficult to attract, let alone retain, industry workers.



Alianait Arts Festival by Vincent Desrosiers



Broadway Theatre by Andrew Bromwell

To help counter this trend, it is crucial to create an environment that nurtures local talent, celebrates homegrown talent and regional success stories, and supports access to external markets and business opportunities while encouraging talent to keep Canada as a home base. Many organizations and businesses in the industry indicate their staff often juggle multiple roles and lack formal training. In particular, industry roundtable participants noted that there is a clear need for targeted training programs in areas like sound technology and event management to ensure that the workforce is equipped to meet the demands of the industry. Internships and co-ops also play a key role in enticing people into the industry.

Formal training does not exist for some roles in the industry, such as for artist managers or promoters. Many skills are honed and developed through years of experience, heightening the importance of mentorship opportunities in developing critical skillsets and strengthening professionalism in the industry. Many internships and co-ops are offered directly to aspiring industry-workers at an organizational level. As a major employer in the live music industry, Live Nation, as one example, offers various opportunities for internships throughout the entertainment industry, including in concert promotion, production, and marketing.

Relatedly, industry roundtable participants note that there is a need for greater awareness, access to, and availability of educational and mentorship opportunities for new artists and live music workers. Such opportunities help equip artists and live music workers with the necessary skills to navigate the complexities of the music industry. Industry roundtable participants noted that needed skills include knowledge around rights, royalties, taxes, and business skill development. The industry also noted the need for more industry mentorship opportunities

in helping support a strengthened talent pipeline. By investing in mentorship and training, the industry can empower new voices and build more sustainable careers. Moreover, there is a lack of knowledge among those interested in the industry about what career paths exist.

There has also been a shift towards larger corporate entities running more shows and venues, which presents an opportunity for more sustainable cost-recovery models for venues and organizations. However, it also highlights the need for a balance that ensures local promoters, who are deeply connected to regional tastes and trends, continue to play an integral role. Supporting the development and growth of local promoters could help ensure early career opportunities for emerging artists, foster greater diversity in the industry, and ensure that local artists have the chance to thrive.

5.3.4 Compensation & Working Conditions

52% of respondents to the national survey selected “professional wages” as a top challenge. The lack of fair compensation continues to be a major challenge across live music. Many industry roundtable participants and survey respondents raised concern about low artist pay, with the prevalence of “pay-to-play” models leading to calls for fairer compensation practices. Some proposed potential solutions, such as the implementation of a living wage model for musicians and improving working conditions for gig workers. Ireland launched a pilot of its Basic Income for the Arts in 2022, which provided €325 per week to 2,000 eligible artists and creative arts workers.⁷⁵ This program has been granted €35 million as of Ireland’s 2025 budget to continue past the pilot phase.

These solutions were not just noted for musicians, but also to support more sustainable and favourable working conditions for all live music workers across the industry. Lack of compensation is having a direct impact on the talent drain in the industry and was also partly the reason many industry workers left to pursue new opportunities during the height of the pandemic. Additionally, many young people start out interested in the industry, especially drawn in through internships and co-ops, but leave for other industries due to lack of opportunities for salary growth.

⁷⁵ HotPress. 2024. “[Budget 2025: Basic Income for the Arts scheme extended with €35m.](#)”

When it comes to working conditions, the industry cites mental health, stability, and burn-out as key challenges. The industry often requires those comfortable with flexibility and instability. For instance, those working in festivals often experience fluctuations in workload between periods of intense hours and activity – especially leading up to an event or production – among periods of downtime and inactivity. Contract work is common in the industry, which can present problems as these workers lack benefits. Additionally, it can be difficult to cobble together enough contracts to work in live music full-time. These challenges illuminate an overarching need for more supportive practices and healthier working conditions that will help attract and retain talent within the industry.

Fostering greater partnerships in terms of tourism circuits and across municipalities can help advance live music by increasing market access on a national scale.

5.3.5 Business Models & Market Access

Many in the industry feel that there is significant opportunity for increased connection and collaboration across the country to help tackle industry-wide challenges. For instance, fostering greater partnerships in terms of tourism circuits and across municipalities can help advance live music by increasing market access on a national scale.

Additionally, the industry is facing a pressing need for more innovative business models. Traditional revenue streams – particularly for music events, festivals, and venues, for whom expenses are especially high (see Table 5) – are under strain as audience behaviours evolve and economic realities shift. For instance, the rise in cost of living has decreased the amount of disposable income that audiences have available to spend on live shows. Moreover, live events can no longer rely heavily on alcohol sales given the trend of young people drinking less. Additionally, there is a growing need to confront the impact of climate change on event planning and operations through stronger contingency planning. These shifts necessitate a rethinking of business strategies and planning to ensure sustainability throughout the live music industry.

Some innovative business models and initiatives have emerged recently in the industry. For example, the Calgary Airport Authority alongside Calgary-based music organizations like Calgary Folk Fest, Calgary International Blues Festival and the Honens International, launched a showcase series at YYC in 2018 offering paid opportunities for local artist to perform to global audiences coming through the airport.⁷⁶ The program is now looking to expand into other nontraditional performance venues, such as hospitals.

Touring – a fundamental activity in live music and critical for audience development – is also presented with unique obstacles due to Canada's vast geography and high travel costs. Many artists, especially those based in more rural and remote areas, find it difficult to access new markets and perform regularly. The infrequency of suitable venues outside major hubs like southern Ontario and the lower mainland of British Columbia, means artists often incur significant costs traveling long distances between shows. Addressing these geographic and logistical barriers, such as through the introduction of regional touring circuits, is essential for facilitating greater market access and ensuring the viability of touring for Canadian musicians, and the live music workers that are supported through touring. Home Routes/Chemin Chez Nous is one such example of a regional touring circuit, spanning British Columbia and Alberta, to Manitoba and Ontario.⁷⁷



Wavelength Winter Festival by Green Yang

⁷⁶ YYC Calgary International Airport. 2018. "[All about the Authority.](#)"

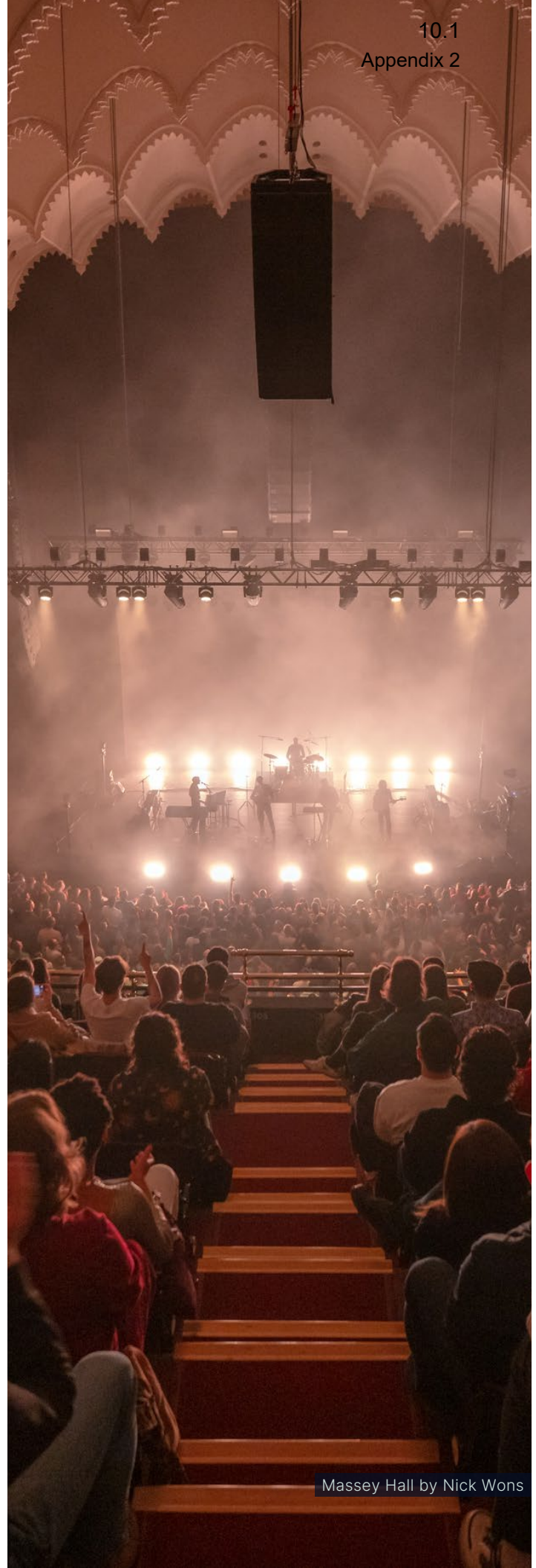
⁷⁷ Home Routes/Chemin Chez Nous. 2024. "[Home Routes Announces 2024/2025 Season.](#)"

5.3.6 Tourism & Promotion

Industry roundtable participants note that the integration of live music within tourism efforts remains rather limited across Canada. Live music is a significant tourism driver, and the tourism spending associated with live music contributes substantial economic impacts (including an estimated \$4.67 billion in labour income, \$8.92 billion in GDP, \$3.21 billion in fiscal impacts, and over 77,000 full-time equivalent jobs in 2023, as outlined in section 4.2), yet there is greater opportunity to leverage this potential within destination marketing efforts. Many in the industry express that Canada excels at marketing its breathtaking landscapes and abundant recreational activities but is missing out on promoting its rich cultural experiences – including the vibrancy of its live music. There is a need and opportunity to enhance collaboration between the industry and Canadian tourism agencies to better highlight festivals and events to position Canada as a top destination for music lovers – not just outdoor enthusiasts.

Moreover, there is opportunity to better promote and champion regional and national success stories in live music to increase Canada's reputation on an international scale, and to encourage greater participation and support for local artists and events among domestic audiences. Joint collaborations between live music organizations and tourism bodies could not only help put Canada on the map in terms of its diverse live music industry and increase cultural tourism, but also help shape policies for the benefit of both industries.

Additionally, there is opportunity for municipalities and regions across Canada to recognize the importance of live music as a significant tourism driver. In particular, municipalities and regions could look to advance night-time economic strategies that will help support job creation in the industry and increase live music's economic potential.



Massey Hall by Nick Wons

A large crowd of people is gathered at a night festival, illuminated by vibrant purple and blue stage lights. In the background, a stage features large white silhouettes of figures. A banner on the left side of the stage partially reads "RE Bell" and "OSHEAGA".

Section VI:

CONCLUSION

Operating in an ever-evolving landscape, live music is becoming increasingly important and its potential for growth, along with the economic returns it generates, is clear.

To date, there has been a lack of awareness of the exceptional economic and cultural contributions of the live music industry – which was precisely the impetus for this report. **Hear and Now** establishes a crucial benchmark for measuring the industry's potential and progress over time. Equipping the industry with the clear data on the economic, tourism and social impacts of live music found in this report will help build a more fulsome understanding of the incredible value of live music and assist in advocacy efforts for greater support and recognition.

This report nods to several areas where future research would be beneficial to support the industry, including:

- Continued assessment of barriers for equity-deserving individuals, as well as equity, diversity and inclusion (e.g., in ownership and employment) across the industry.
- Additional research into environmental best practices across the industry.
- Regular measurement of the industry's impacts, to assess progress and potential over time.

The live music industry in Canada is vast and varied – from artists, performers, and technicians to venue staff, promoters, and service workers – and attracts hundreds of thousands of tourists year over year. Additionally, the economic benefits of live music spillover to other industries, helping the creation and sustainability of jobs in sectors like hospitality, transportation, and retail. As live music flourishes, the industry generates more jobs and opportunities for artists to grow and expand their careers, and unlocks even greater economic potential for the benefit of all Canadians.

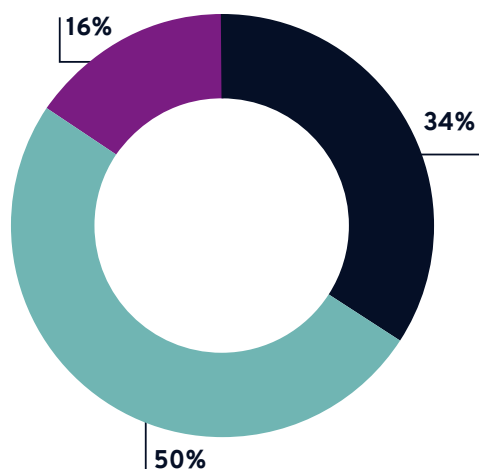


Photo courtesy of Canmore Folk Festival

Appendix A. Survey Respondent Breakdown

Half (50%) of the respondents were answering on behalf of a music business or performing arts organization; just over one-third (34%) were a self-managed artist, musician, performer, band, DJ, choir, or related; and 16% were freelancers in the music industry. The following chart shows the survey respondents broken out by respondent type.

FIGURE 20:
Survey Respondent Type



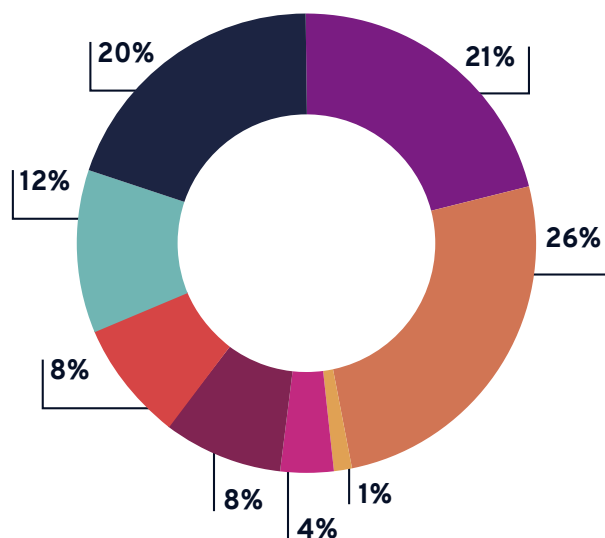
- A artist, musician, musical performer, band, DJ, choir, or related
- A music business or performing arts organization
- A music industry professional or freelancer

n=652

Source: Nordicity, Hear and Now Survey

Over one-fifth (21%) of respondents were from a music venue, while slightly more than one-quarter (26%) were from a music festival, event, showcase, or award show. Respondents' primary function in the industry is illustrated in the chart below.

FIGURE 21:
Primary Role in Music Industry



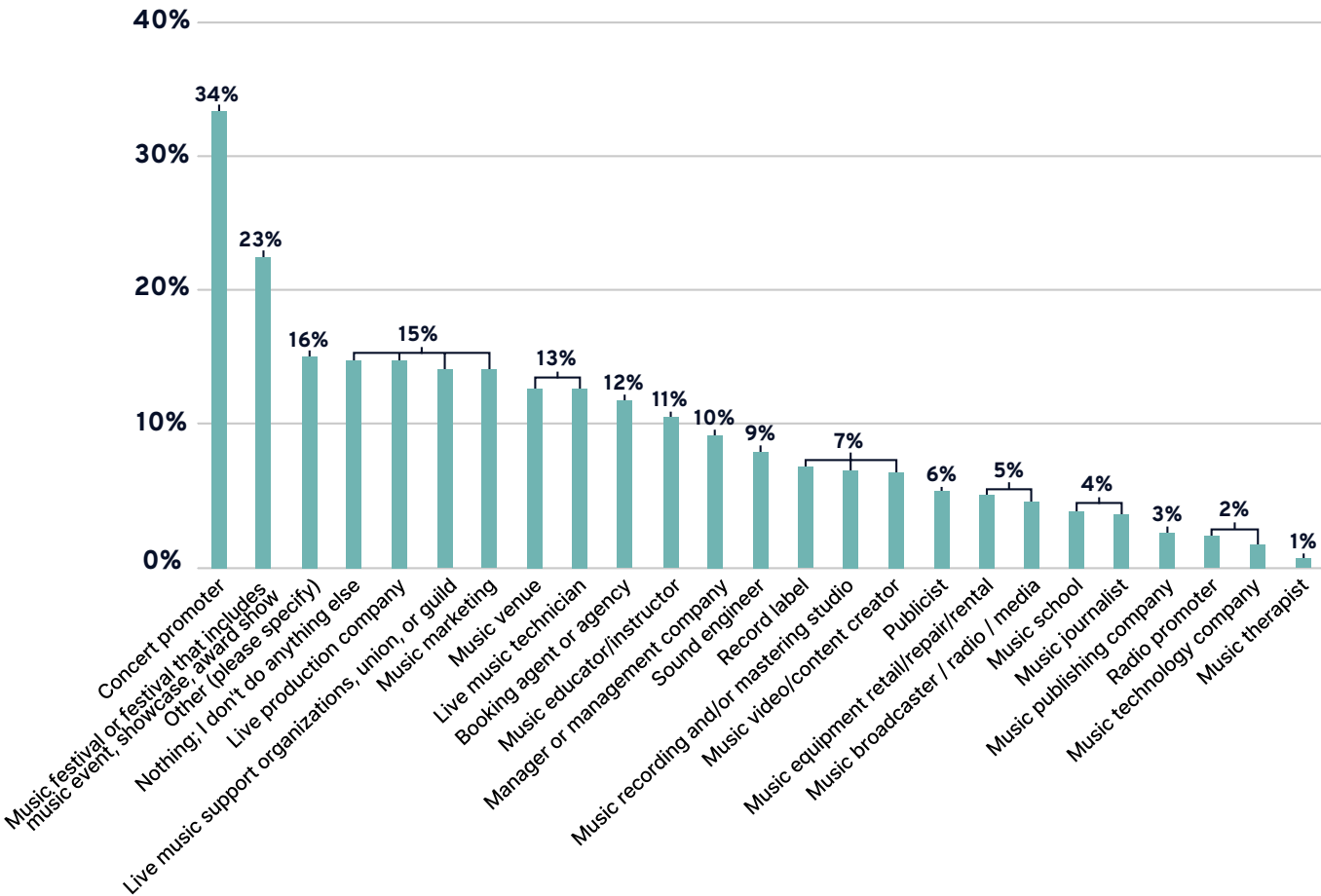
- Music venue (including occasional venues)
- Booking agent or agency
- Live music production (e.g., live music production company, AV specialist, sound tech, roadie, crew, production assistant, live engineer, etc.)
- Music festival or festival that includes music, event, showcase, or award show
- Concert promoter
- Other (please specify)
- Publicist
- Manager or management company (including artist/DJ managers and tour managers)

n=430

Source: Nordicity, Hear and Now Survey

Respondents were also asked whether they had a secondary role in the live music industry, which 85% of company/organization respondents did – indicating that the vast majority of live music industry employees wear multiple professional hats (see chart below).

FIGURE 21:
Secondary Role in Music Industry



n=430
Source: Nordicity, Hear and Now Survey

Hear and Now



City of Mississauga Corporate Report



Date: March 26, 2025	Originator's files:
To: Chair and Members of General Committee	
From: Nadia Paladino, Acting Commissioner of Community Services	Meeting date: May 7, 2025

Subject

Single Source Approval for Self Contained Breathing Apparatus (SCBA) Equipment for Mississauga Fire & Emergency Services

Recommendation

1. That the Chief Procurement Officer or designate be authorized to award and execute the single source contract with respect to the purchase between The Corporation of the City of Mississauga and A.J. Stone Company Ltd. for the supply and delivery of Self Contained Breathing Apparatus Equipment and associated licensing, maintenance, testing and support with an upset limit of \$785,000.00 exclusive of taxes, for a term of up to five years, as outlined in the corporate report entitled "Single Source Approval for Self Contained Breathing Apparatus (SCBA) Equipment for Mississauga Fire and Emergency Services" dated March 26, 2025 from the Commissioner of Community Services and all necessary agreements and related ancillary agreements, all in a form satisfactory to the City Solicitor, in accordance with the City's Procurement By-law 0013-2022, as amended.
2. That all necessary by-laws be enacted.

Executive Summary

- SCBA equipment provides firefighters with a continuous supply of breathable air when entering hazardous environments during emergency responses, allowing to operate immediately in dangerous to life or health atmospheres.
- The current contract, obtained through a Request for Proposal, with A.J. Stone Company Ltd. with a contract term of 10 years for the purchase, maintenance, testing and warranty management of SCBA is expiring June 30, 2025.
- Staff is seeking approval to award a single source contract to A.J. Stone Company Ltd. for the purpose of purchasing SCBA equipment and components, testing and warranty management to address new station openings as well as continued maintenance and

repair requirements of the existing equipment.

- Mississauga Fire and Emergency Services (MFES) requires compatibility and consistency in SCBA equipment ensuring consistency in training, maintenance, and safety protocols. Switching manufacturers now, would require a significant capital investment and training costs.

Background

SCBA is an essential component of ensuring the life safety of MFES employees while they carry out their duties as first responders. The SCBA is an integral part of a firefighter's personal protective ensemble (PPE). An SCBA unit allows the firefighter to breathe, work, and communicate in an environment that is immediately dangerous to life or health. MFES maintains a complement of approximately 260 SCBA packs, 870 SCBA compressed air cylinders, 650 SCBA facepieces, and other related hardware. Regular maintenance, calibration and annual certification of all SCBA equipment is required to ensure its operational readiness.

A request for proposal (RFP) was issued in 2014 for the supply, delivery, installation and maintenance of SCBA. The contract was awarded to A.J. Stone Company Ltd. for a 10-year term, expiring June 30, 2025. MFES' current SCBA equipment has consistently provided performance, safety, and seamless integration with existing systems. The department's existing SCBA inventory remains within its useful life cycle and warranty period of 15 years, ensuring continued manufacturer support and minimizing additional maintenance costs.

Comments

A.J. Stone Company Ltd. is the exclusive distributor and service provider of MSA brand SCBA equipment in Ontario. Maintaining MSA brand SCBA equipment ensures (i) consistency in training, maintenance, and safety protocols; (ii) full compatibility and integration with MFES' existing inventory of facepieces, air cylinders, and associated equipment; (iii) continued support as the current equipment remains under warranty. The equipment is a trusted product with a proven track record in emergency scenarios, supporting MFES' operational requirements. Maintaining the equipment at this time would allow for continued manufacturer support, ensure compatibility and integration as well as avoid the significant capital cost to replace all the equipment with another manufacturer's product.

This contract is considered a Single Source Procurement as defined in the Procurement By-Law #0013-2022 which states under Schedule A (1)

- (c) The Goods and/or Services are unique to one particular supplier and no reasonable alternative or substitute exists due to exclusive rights such as patent, copyright, or license;

(h) For additional Goods and/or Services from the original Supplier that were not included in the original Procurement, if the change of Supplier for such additional Goods and/or Services cannot be made for:

(i) Economic or technical reasons such as requirements of interchangeability or interoperability with existing equipment, software, services or installations procured under the initial Procurement; and

(ii) Would cause significant inconvenience or substantial duplication of costs for the City.

Financial Impact

There are no additional financial impacts resulting from the recommendations in this report. SCBA requirements, both replacement and new, have been anticipated and sufficiently budgeted. The estimated cost of \$785,000.00 is available in PN 25252 (capital purchases) and cost centre 23002 (maintenance and repair).

Conclusion

The safety and well-being of our employees is a top priority. Having reliable, functioning SCBA gear is crucial to MFES' effectiveness in safeguarding our community. The ability to safely respond to emergency events in atmospheres that are immediately dangerous to life and health in the City requires the availability of PPE that includes SCBA gear.

A single source contract with A.J. Stone Company Ltd. for MSA brand SCBA equipment will support firefighter safety, enhance operational efficiency, and align with current departmental standard operating procedures and processes. The continued warranty coverage on existing inventory further justifies this procurement strategy by ensuring cost-effective maintenance and operational consistency.



Nadia Paladino, Acting Commissioner of Community Services

Prepared by: David Tran, Division Chief, Capital Assets, Fire & Emergency Services

City of Mississauga Corporate Report



Date: April 25, 2025 To: Chair and Members of General Committee	Originator's files: RT.10.ZVAR
From: Sam Rogers, MBA, Commissioner of Transportation and Works	Meeting date: May 7, 2025

Subject

2025 Traffic Calming Program (Ward 2, Ward 4, Ward 6, Ward 7, Ward 8, and Ward 11)

Recommendation

That the recommendations as outlined in the Corporate Report from the Commissioner of Transportation and Works dated April 25, 2025 and entitled "2025 Traffic Calming Program (Ward 2, Ward 4, Ward 6, Ward 7, Ward 8, and Ward 11)" be approved; and that the Report be referred to the Mississauga School Traffic Safety Action Committee, Mississauga Cycling Advisory Committee and the Mississauga Road Safety Committee for information.

Executive Summary

- Fifth Line West, south of Dundas Street West (Ward 2), Truscott Drive (Ward 2), Elora Drive (Ward 4), Huntington Ridge Drive (Ward 4), The Credit Woodlands / McBride Avenue (Ward 6), Queensway West / Glengarry Road / Old Carriage Road (Ward 7), Angel Pass Drive / Aquinas Avenue / Artesian Drive (Ward 8), Derry Dale Drive / Panhellenic Drive / St. Barbara Boulevard (Ward 11), Envoy Drive / Tabbyman Walk (Ward 11), Kenninghall Boulevard (Ward 11), McFarren Boulevard (Ward 11), and Vista Boulevard / Vista Drive (Ward 11) are being recommended for the installation of physical traffic calming.
- Following a public consultation process, support was received from each community through a survey process for each of the recommended traffic calming projects.
- Funds allocated from the Traffic Calming Program Capital budget, as well as funds from the Special Project Ward Funding for Wards 2, 4, 8, and 11, are being utilized to deliver the above projects.
- No concerns have been raised from municipal services, emergency services or MiWay regarding the proposed traffic calming measures.

Background

The Traffic Services and Road Safety Section regularly reviews roadways in response to resident concerns related to speeding, aggressive driving, and traffic infiltration on local roadways within residential neighbourhoods. The results of these reviews determine if physical traffic calming measures are warranted based on the City's Traffic Calming Policy (10-09-03).

In 2025, staff prioritized 4 locations for physical traffic calming measures to address issues of confirmed speeding and aggressive driving behaviour. Staff worked in consultation with the respective Ward Councillors in developing plans that would address the issues and reduce speeding on the roadway. The 4 projects would be funded through the available Traffic Calming capital funding. In addition to these 4 projects, 8 locations have been identified by Wards 2, 4, 8, and 11 Councillors to be prioritized and funded through the Special Project Ward Funding.

The following locations were identified:

- Fifth Line West – south of Dundas Street West (Appendix 1)
- Truscott Drive (Appendix 2)
- Elora Drive (Appendix 3)
- Huntington Ridge Drive (Appendix 4)
- The Credit Woodlands and McBride Avenue (Appendix 5)
- Queensway West, Glengarry Road, and Old Carriage Road (Appendix 6)
- Angel Pass Drive, Aquinas Avenue, and Artesian Drive (Appendix 7)
- Saint Barbara Boulevard, Derrydale Drive, and Panhellenic Drive (Appendix 8)
- Envoy Drive and Tabbyman Walk (Appendix 9)
- Kenninghall Boulevard (Appendix 10)
- McFarren Boulevard (Appendix 11)
- Vista Boulevard and Vista Drive (Appendix 12)

The results of the most recent speed reviews at each of the above locations are as follows:

Location	Posted Speed	85th Percentile Speed
Fifth Line West (south of Dundas Street West)	40 km/h	55 km/h
Truscott Drive (east of Southdown Road)	40 km/h	59 km/h
Truscott Drive (west of Southdown Road)	30 km/h 40 km/h	53 km/h 59 km/h

Elora Drive	30 km/h 40 km/h	47 km/h 53 km/h
Huntington Ridge Drive (west of McLaughlin Road)	40 km/h	49 km/h
The Credit Woodlands	30 km/h 40 km/h	51 km/h 54 km/h
McBride Avenue	30 km/h 40 km/h	45 km/h 52 km/h
Quensway West	40 km/h	57 km/h
Glengarry Road	40 km/h	55 km/h
Old Carriage Road	40 km/h	56 km/h
Angel Pass Drive	40 km/h	50 km/h
Aquinas Avenue	30 km/h 40 km/h	52 km/h 52 km/h
Artesian Drive	30 km/h 40 km/h	50 km/h 52 km/h
Saint Barbara Drive	40 km/h	55 km/h
Derrydale Drive	40 km/h	59 km/h
Panhellenic Drive	40 km/h	52 km/h
Envoy Drive	40 km/h	50 km/h
Tabbyman Walk	40 km/h	53 km/h
Kenninghall Boulevard	40 km/h	53 km/h
McFarren Boulevard	40 km/h	54 km/h
Vista Boulevard	30 km/h 40 km/h	45 km/h 50 km/h
Vista Drive	40 km/h	50 km/h

Comments

Once traffic calming candidate locations are identified, preliminary plans are developed by staff. Consideration is given to the type, number, location, and spacing of traffic calming devices based on the individual roadway characteristics. The plan is designed specific to each roadway to have the maximum impact on operating speeds while ensuring a consistent speed throughout the area. The devices recommended by staff are commonly used throughout the City of Mississauga and are consistent with industry best practises related to road safety and traffic calming.

Public Consultation

Each traffic calming proposal was presented to the directly impacted residents, in the form of an online survey and in some cases an in-person public meeting. Residents were given an opportunity to provide feedback and voice their support or opposition to the plan. No significant opposition was received from residents who engaged in the consultation for each project, and each project is supported by the respective Ward Councillor.

Staff provided the concept traffic calming plans to all emergency services and MiWay and no concerns have been raised regarding the proposed traffic calming.

2024 Traffic Calming Program

In 2024, staff completed construction of traffic calming on 9 roadways that were approved by Council.

The results of our initial follow-up studies reveal significant impacts on the overall operating speeds. We have observed an average of 10 km/h decrease in the operating speeds, and an average of 25% increase in speed limit compliance where physical traffic calming measures were installed.

Financial Impact

The estimated costs associated with the following traffic calming projects can be accommodated within the Traffic Calming Program Capital budget:

Project	Estimate	PN#	Ward
Fifth Line West (south of Dundas Street) • 9 speed cushion installations	\$75,000	24199	Ward 2
The Credit Woodlands • 8 speed cushion installations	\$75,000	24199	Ward 6
McBride Avenue • 2 speed cushion installations • 1 raised pedestrian crossover	\$70,000	24199	Ward 6
Queensway West • 5 speed cushion installations	\$65,000	24199	Ward 7
Glengarry Road • 4 speed cushion installations	\$35,000	23199	Ward 7
Old Carriage Road • 5 speed cushion installations	\$40,000	23199	Ward 7
St. Barbara Boulevard, Derrydale Drive, Panhellenic Drive • 10 speed cushion installations	\$72,000	22199	Ward 11

The estimated cost associated with the remaining traffic calming projects in Wards 2, 4, 8, and 11, can be accommodated within the respective Special Ward Funding allocated for road safety improvements:

Project	Estimate	PN#	Ward
Truscott Drive (east of Southdown Road) <ul style="list-style-type: none"> • 3 speed cushion installations • 1 raised pedestrian crossing 	\$60,000	E21199	Ward 2
Truscott Drive (west of Southdown Road) <ul style="list-style-type: none"> • 4 speed cushion installations 	\$35,000	E21199	Ward 2
Elora Drive <ul style="list-style-type: none"> • 4 speed cushion installations • 1 pedestrian crossover 	\$75,000	D21199	Ward 4
Huntington Ridge Drive <ul style="list-style-type: none"> • 4 speed cushion installations 	\$40,000	D21199	Ward 4
Angel Pass Drive <ul style="list-style-type: none"> • 2 speed cushion installations 	\$20,000	C22199	Ward 8
Aquinas Avenue <ul style="list-style-type: none"> • 2 speed cushion installations 	\$20,000	C22199	Ward 8
Artesian Drive <ul style="list-style-type: none"> • 2 speed cushion installations 	\$20,000	C22199	Ward 8
Envoy Drive, Tabbyman Walk <ul style="list-style-type: none"> • 2 speed cushion installations 	\$15,000	E22199	Ward 11
Kenninghall Boulevard <ul style="list-style-type: none"> • 2 speed cushion installations 	\$12,000	E22199	Ward 11
McFarren Boulevard <ul style="list-style-type: none"> • 5 speed cushion installations 	\$35,000	E22199	Ward 11
Vista Boulevard, Vista Drive <ul style="list-style-type: none"> • 6 speed cushion installations 	\$35,000	E22199	Ward 11

Conclusion

Through consultation with the Ward Councillors and local residents, staff are recommending the installation of physical traffic calming measures on Fifth Line West, south of Dundas Street West, Truscott Drive, Elora Drive, Huntington Ridge Drive, The Credit Woodlands and McBride Avenue, Queensway West, Glengarry Road, and Old Carriage Road, Angel Pass Drive, Aquinas Avenue, and Artesian Drive, Saint Barbara Boulevard, Derry Dale Drive, and Panhellenic Drive, Envoy Drive and Tabbyman Walk, Kenninghall Boulevard, McFarren Boulevard, and Vista Boulevard and Vista Drive to increase roadway safety and reduce operating speeds.

Attachments

Appendix 1: Location Map – Traffic Calming Fifth Line West (Ward 2)

Appendix 2: Location Map – Traffic Calming Truscott Drive (Ward 2)

Appendix 3: Location Map – Traffic Calming Elora Drive (Ward 4)

Appendix 4: Location Map – Traffic Calming Huntington Ridge Drive (Ward 4)

Appendix 5: Location Map – Traffic Calming The Credit Woodlands and McBride Avenue (Ward 6)

Appendix 6: Location Map – Traffic Calming Queensway West, Glengarry Road, and Old Carriage Road (Ward 7)

Appendix 7: Location Map – Traffic Calming Angel Pass Drive, Aquinas Avenue, and Artesian Drive (Ward 8)

Appendix 8: Location Map – Traffic Calming Saint Barbara Boulevard, Derrydale Drive, and Panhellenic Drive (Ward 11)

Appendix 9: Location Map – Traffic Calming Envoy Drive and Tabbyman Walk (Ward 11)

Appendix 10: Location Map – Traffic Calming Kenninghall Boulevard (Ward 11)

Appendix 11: Location Map – Traffic Calming McFarren Boulevard (Ward 11)

Appendix 12: Location Map – Traffic Calming Vista Boulevard and Vista Drive (Ward 11)

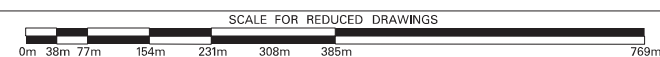


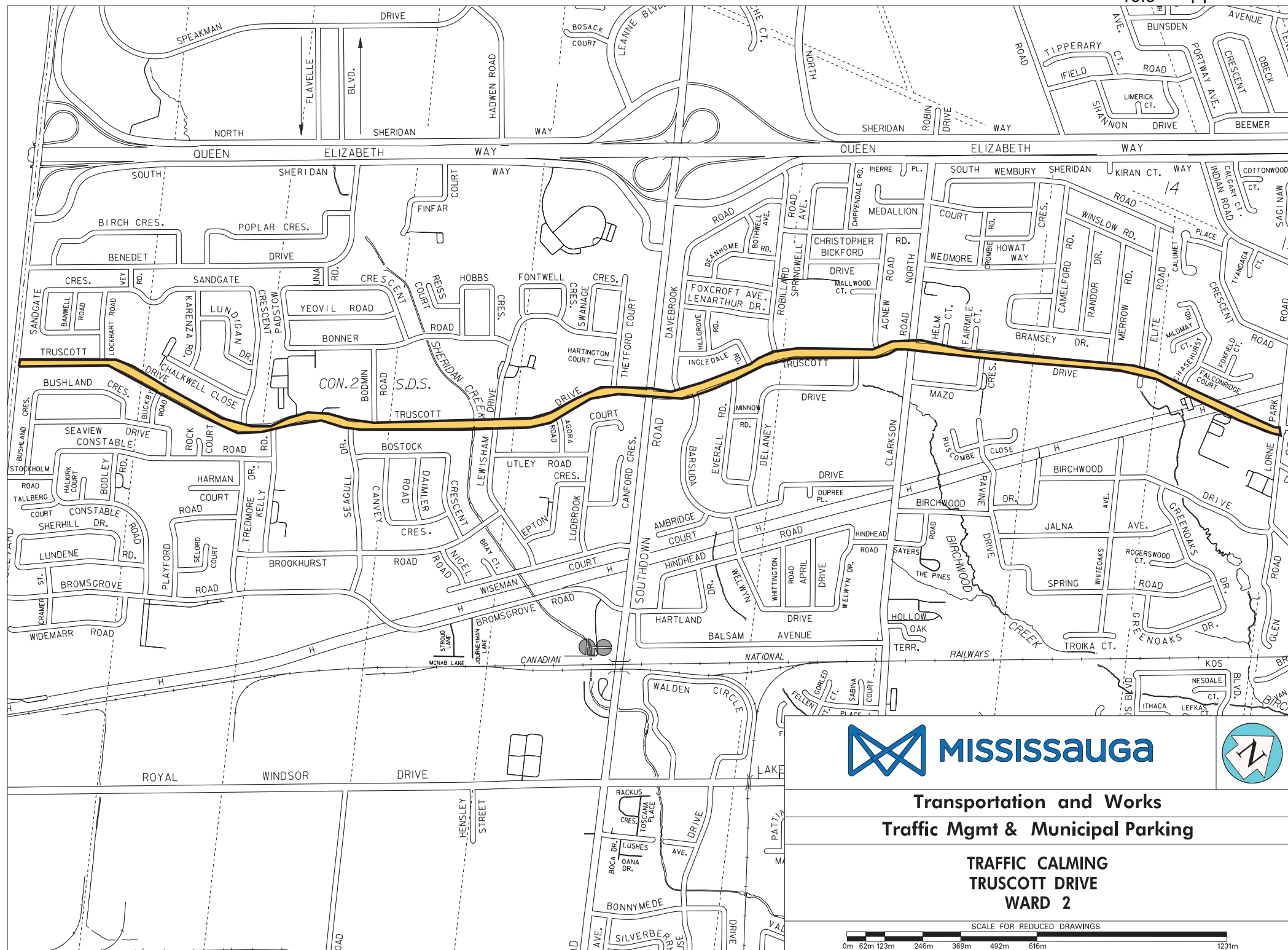
Sam Rogers, MBA, Commissioner of Transportation and Works

Prepared by: Maxwell Gill, C.E.T., Acting Manager of Traffic Services and Road Safety

Traffic Mgmt & Municipal Parking

**TRAFFIC CALMING
FIFTH LINE WEST
WARD 2**





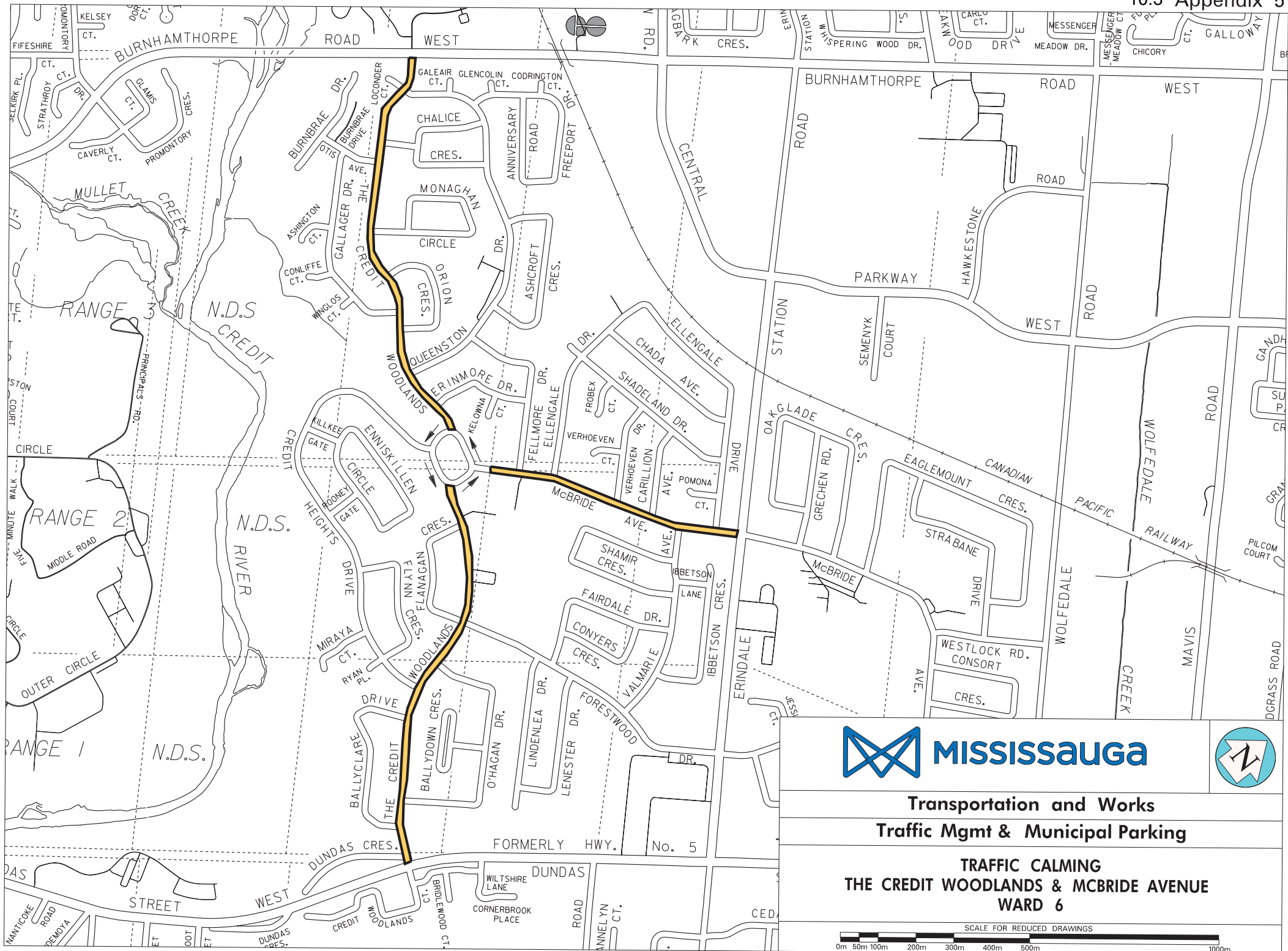
**TRAFFIC CALMING
ELORA DRIVE
WARD 4**

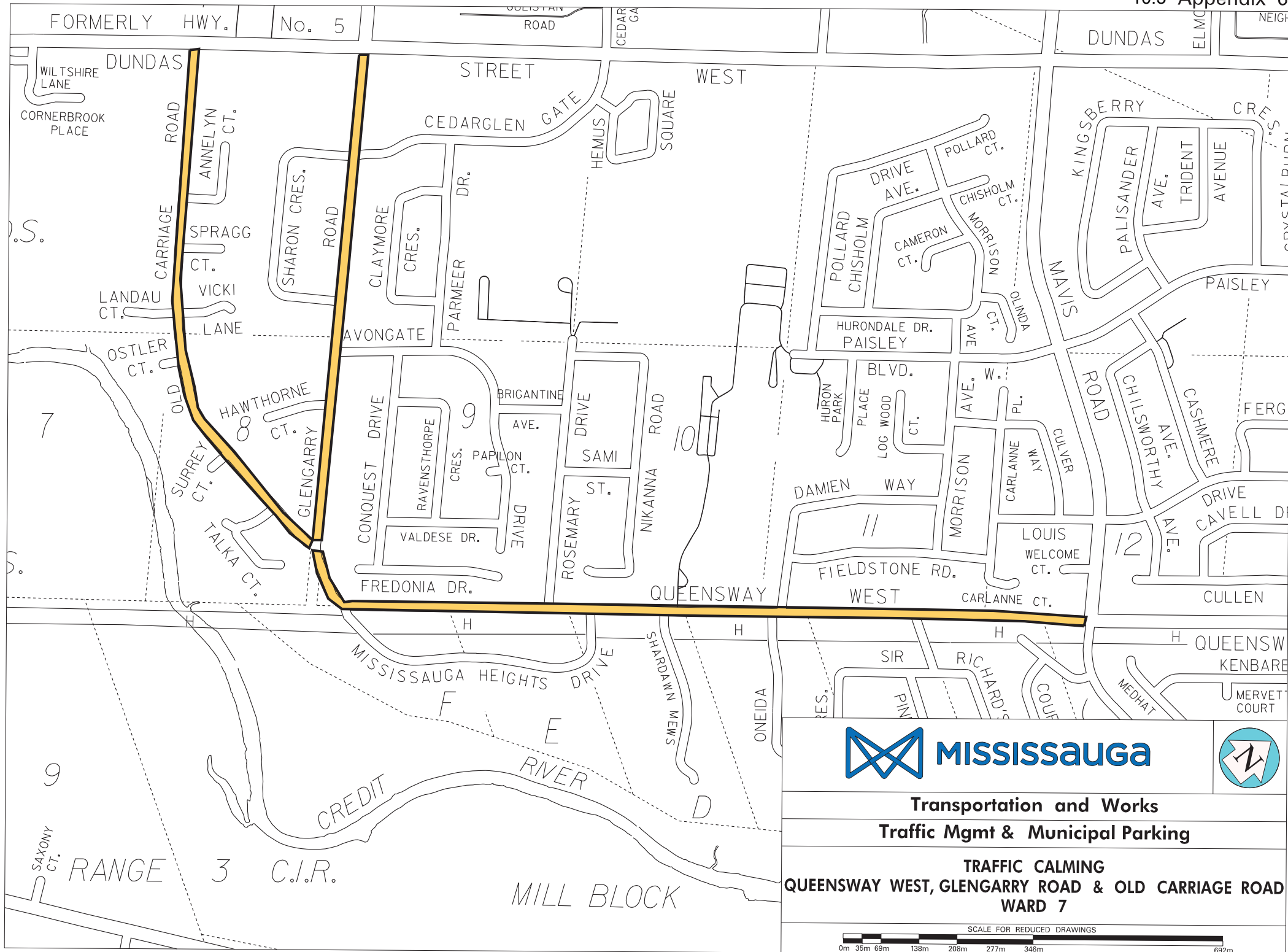


Traffic Mgmt & Municipal Parking

SCALE FOR REDUCED DRAWINGS







MISSISSAUGA



Transportation and Works

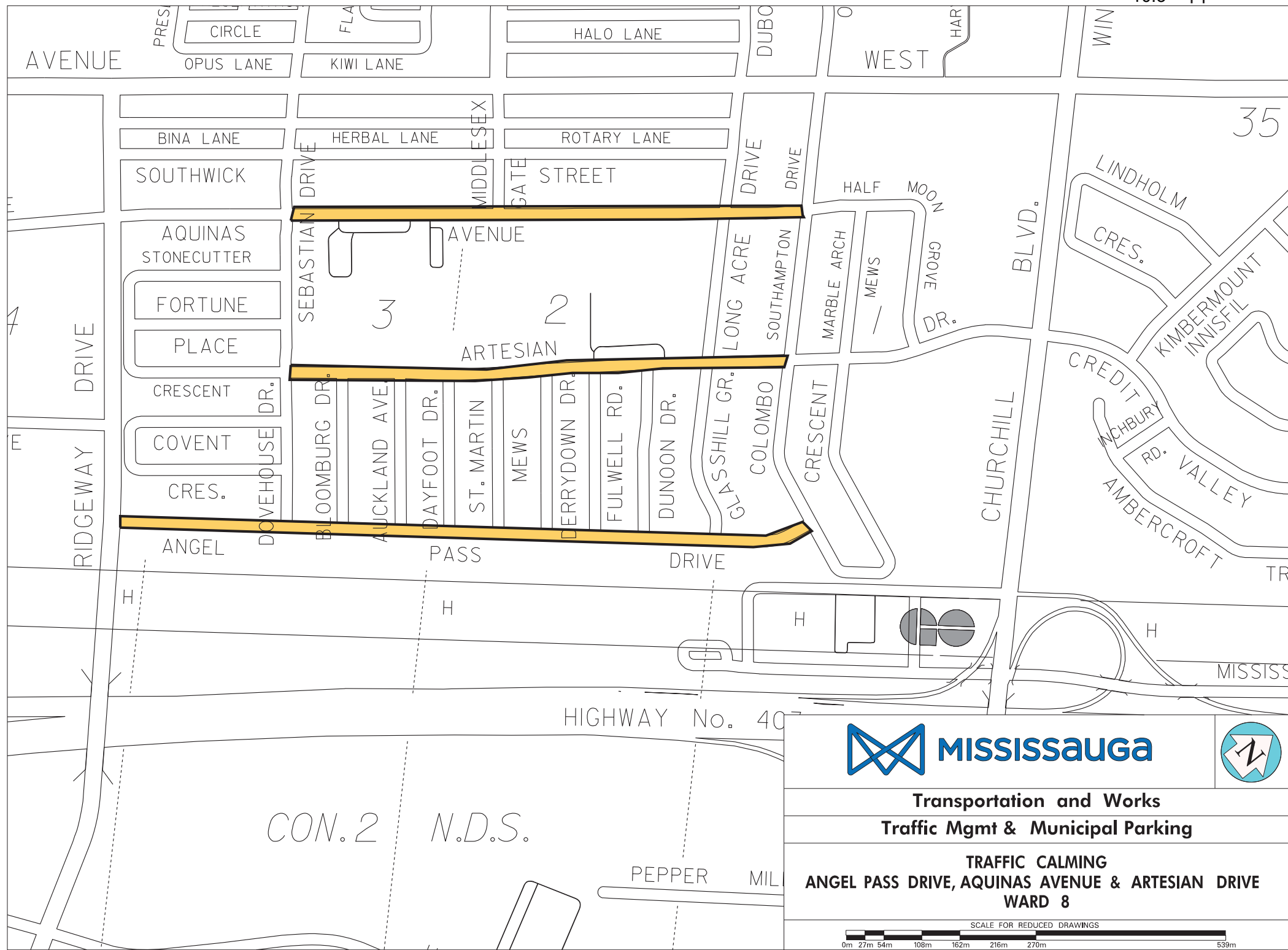
Traffic Mgmt & Municipal Parking

TRAFFIC CALMING

**QUEENSWAY WEST, GLENGARRY ROAD & OLD CARRIAGE ROAD
WARD 7**

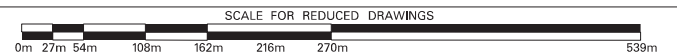
SCALE FOR REDUCED DRAWINGS



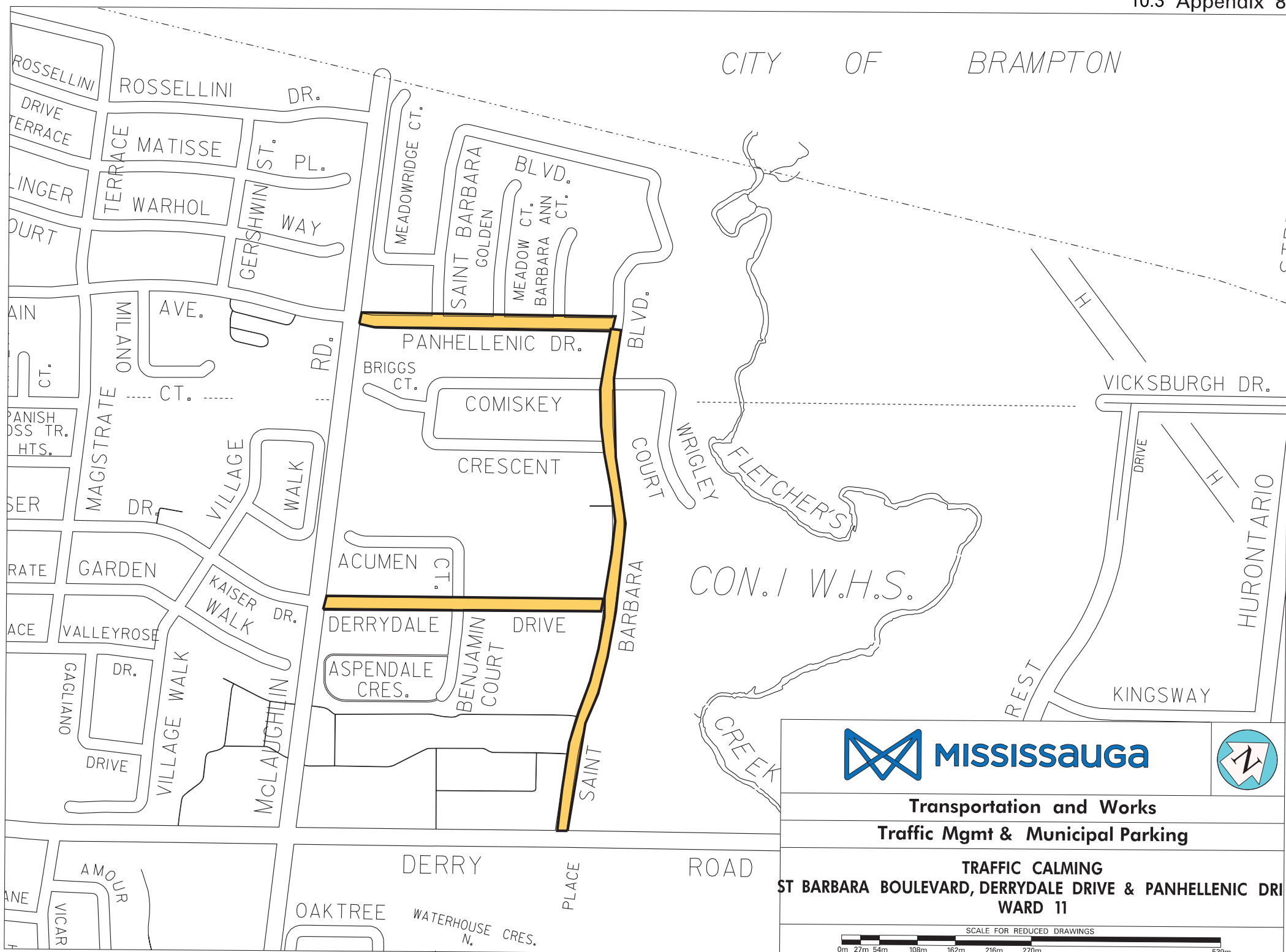


Transportation and Works
Traffic Mgmt & Municipal Parking

TRAFFIC CALMING
ANGEL PASS DRIVE, AQUINAS AVENUE & ARTESIAN DRIVE
WARD 8



CITY OF BRAMPTON



MISSISSAUGA



Transportation and Works

Traffic Mgmt & Municipal Parking

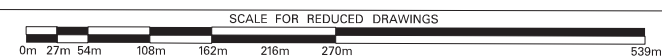
TRAFFIC CALMING

ST BARBARA BOULEVARD, DERRYDALE DRIVE & PANGELENIC DRIVE
WARD 11

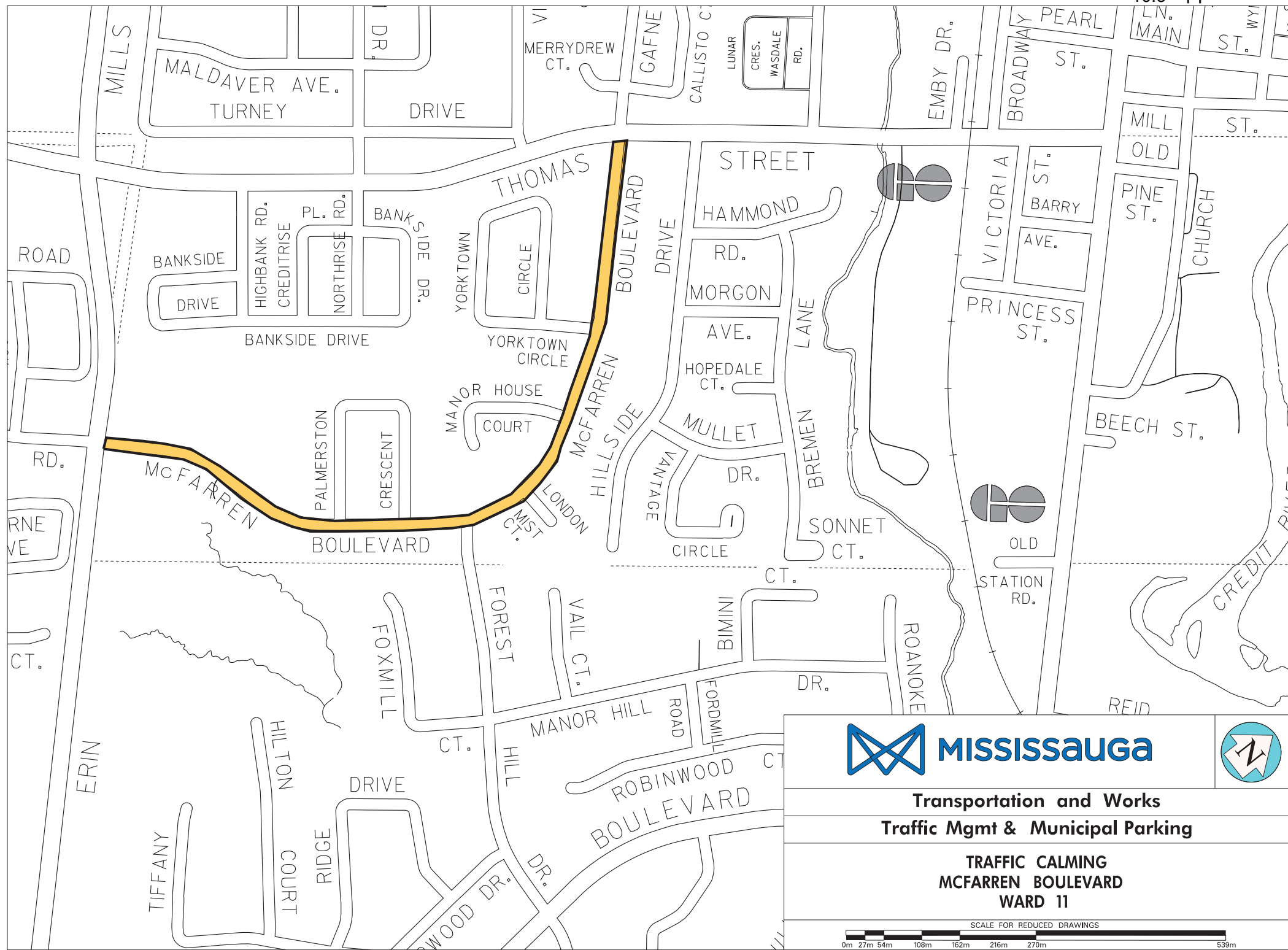
SCALE FOR REDUCED DRAWINGS

0m 27m 54m 108m 162m 216m 270m 539m

**TRAFFIC CALMING
ENVOY DRIVE & TABBYPAN WALK
WARD 11**







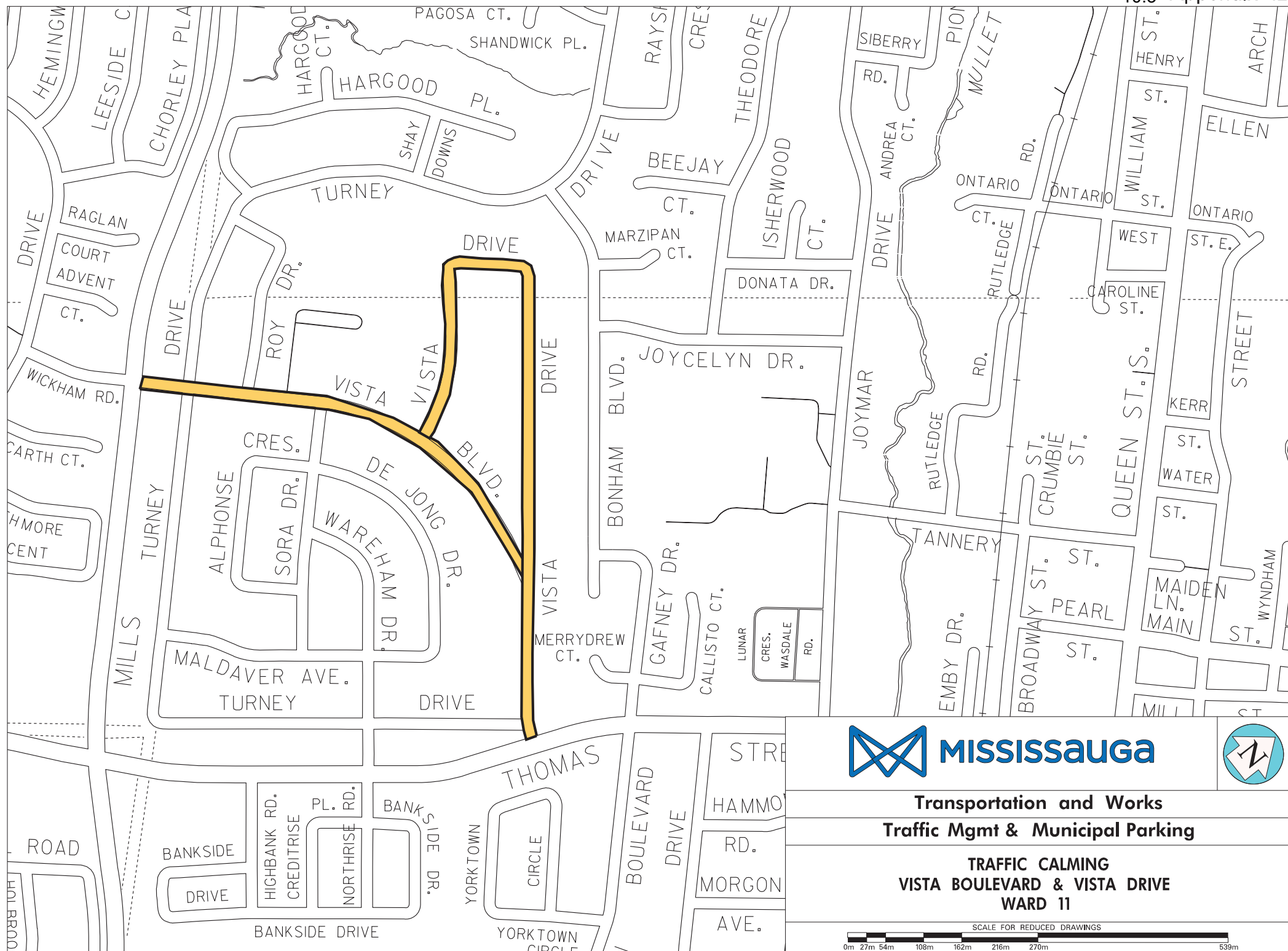
MISSISSAUGA



**Transportation and Works
Traffic Mgmt & Municipal Parking**

**TRAFFIC CALMING
MCFARREN BOULEVARD
WARD 11**

SCALE FOR REDUCED DRAWINGS
0m 27m 54m 108m 162m 216m 270m 539m



REPORT 3 - 2025

To: CHAIR AND MEMBERS OF GENERAL COMMITTEE

The Mississauga School Traffic Safety Action Committee presents its third for 2025 and recommends:

MSTSAC-0021-2025

That the Mississauga School Traffic Safety Action Committee 2025 Work Plan be received, as presented.

(MSTSAC-0021-2025)

MSTSAC-0022-2025

1. That Junaid Shah and Mario Matteazzi, Citizen members of the Mississauga School Traffic Safety Action Committee, be authorized to attend the 2025 Ontario Traffic Council Summit, on April 30 to May 2, 2025 in Muskoka, Ontario, and that the costs for registration, and travel of up to \$5000 be allocated from the 2025 Mississauga School Traffic Safety Action Committee budget.
2. That Louise Goegan, Citizen member of the Mississauga School Traffic Safety Action Committee, be authorized to attend the 2025 Ontario Traffic Council (OTC) Summit, on May 1, 2025, in Muskoka, Ontario, where she will be recognized as an Honourary Life Member at the President's Dinner, and that the costs for mileage and related expenses, not exceeding \$600, be allocated from the 2025 Mississauga School Traffic Safety Action Committee budget.
3. That the Mississauga School Traffic Safety Action Committee members who attend the 2025 Ontario Traffic Council Annual Conference on April 30 to May 2, 2025 report back to the Committee, summarizing the sessions they attended at a future Mississauga School Traffic Safety Action Committee meeting.

(MSTSAC-0022-2025)

MSTSAC-0023-2025

That the Mississauga School Traffic Safety Action Committee Site Inspection Statistics Report for April 2025, be received.

(MSTSAC-0023-2025)

MSTSAC-0024-2025

That the warrants have not been met for the placement of a school crossing guard in front of St. Helen Catholic Elementary School, at the intersection of Truscott Drive and Buckby Road, for the students attending St. Helen Catholic Elementary School.

(MSTSAC-0024-2025)

(Ward 2)

MSTSAC-0025-2025

1. That the warrants are no longer met for the retention of the two crossing guards at the intersection of Central Parkway East and Burnhamthorpe Road East for the students attending Briarwood Public School and that the two crossing guards to be removed at the end of the 2024 - 2025 school year on June 30, 2025.
2. That once the recommendation to remove the crossing guards has been adopted by Council, that the Principal of Briarwood Public School be requested to advise all parents and students that two crossing guards at the intersection of Central Parkway East and Burnhamthorpe Road East will be removed permanently at the end of the 2024 - 2025 school year on June 30, 2025.

(MSTSAC-0025-2025)

(Ward 4)

MSTSAC-0026-2025

That Transportation and Works be requested to:

- a. Review the signage on Woodlawn Avenue at the intersection of Queen Street East and Woodlawn Avenue and replace faded signage, for the students attending Mentor College.
- b. Paint ladder markings on Woodlawn Avenue at the south leg of the intersection of Queen Street East and Woodlawn Avenue, for the students attending Mentor College.

(MSTSAC-0026-2025)

(Ward 1)

MSTSAC-0027-2025

1. That the warrants have not been met for the placement of a school crossing guard at the west leg of the intersection of Copenhagen Road and Joliette Crescent for the students of St. Richard Catholic Elementary School.
2. That Transportation and Works be requested to install "no stopping" corner prohibitions on Joliette Crescent, at the west leg of the intersection of Copenhagen Road and Joliette Crescent for the students attending St. Richard Catholic Elementary School.

(MSTSAC-0027-2025)

(Ward 9)

MSTSAC-0028-2025

1. That the warrants are no longer met for the retention of the second crossing guard at the southeast corner of the intersection at Glen Erin Drive and Duncairn Drive/Burnford Trail, for the students attending Divine Mercy Catholic Elementary School and Middlebury Public School.

2. That the Principals of Divine Mercy Catholic Elementary School and Middlebury Public School be requested to advise parents and students that the crossing guard position at the southeast corner of Glen Erin Drive and Burnford Trail will be removed at the end of the 2024 - 2025 school year on June 30, 2025.

3. That the Transportation and Works department be requested to paint ladder markings on all four legs of the intersection of Glen Erin Drive and Duncairn Drive/Burnford Trail.

(MSTSAC-0028-2025)

(Ward 9)

MSTSAC-0029-2025

That the Parking Enforcement in School Zone Report for March 2025, be received.

(MSTSAC-0029-2025)

MSTSAC-0030-2025

That the Transportation and Works Action Items List for April 2025, be received.

(MSTSAC-0030-2025)

Mississauga School Traffic Safety Action Committee 2025 Work Plan

Priority Areas	Action	Timing	Cost
Conduct Site Inspections	<ul style="list-style-type: none"> Respond to all requests for safety reviews and site inspections and make recommendations to Council Recommend place or removal of Crossing Guards based on warrant criteria 	On-going	Mileage Allowance
Promote and educate students and parents on walking and biking to school safely	<ul style="list-style-type: none"> Provide safety information 	On-going	
Recognition Events	<ul style="list-style-type: none"> Dr. Arthur Wood Award (purchase of plaque and name plate) Wilde Wood Award (up to 4 elementary schools) Mississauga School Traffic Safety Action Committee Citizen Member Appreciation Dinner 	December December December	\$400.00 \$2,000.00 \$1,500.00
Task Force Subcommittee	<ul style="list-style-type: none"> To provide communications to Mississauga Schools within the Peel District School Board and Dufferin-Peel Catholic District School Board that can be shared with parents regarding procedures for safe drop off and pickup both on and off school property 	On-going	
High-Risk Schools Working Group	<ul style="list-style-type: none"> Working group to define high-risk school criteria Maintain and update a monthly Top 10 list High-Risk Schools list based on established criteria Share list with Parking Enforcement Report updates to Committee 	To be initiated	
Traffic Safety in School Zones Policy Review	<ul style="list-style-type: none"> Review the comparison of current and proposed Policy – Traffic Safety in School Zones Draft the final revision of the Policy 	On-going	
Ontario Traffic Council Summit 2025	<ul style="list-style-type: none"> Two Citizen Members to attend and report back to the Committee at a future meeting 	April – May	\$5,600.00