



---

Durham Region

# Music Industry Analysis

Prepared for: The Regional Municipality of Durham

March 17, 2025



---

# Table of Contents

<b>Executive Summary</b>	<b>3</b>
<b>Introduction</b>	<b>5</b>
Methodology	6
<b>Durham's Current Music Ecosystem</b>	<b>10</b>
A Foundation for Growth	10
Areas of Need	13
<b>Economic Impact Assessment</b>	<b>16</b>
Total Economic Impact	17
Business Impacts	17
Music Individuals' Impacts	18
Tourism Impacts	18
<b>Outlook on Durham's Music Industry</b>	<b>20</b>
Key Priority Areas	20
Measuring Future Success	25
<b>Appendices</b>	<b>27</b>
Appendix A: Industry Asset List	28
Appendix B: Policy Review Guide	31
Appendix C: Survey Results	35



BOND|ST Event Centre

---

## Executive Summary

This study, procured by Invest Durham and prepared by Nordicity, lays the groundwork to develop a music strategy and action plan that will strengthen the music industry in Durham, further unlocking its opportunity for greater economic and community impacts.

In 2023, Durham's music industry:

- Generated **\$162 million** in gross domestic product (GDP).
- Contributed **\$110 million** in labour income.
- Supported **4,895** full-time-equivalents (FTES).<sup>1</sup>

Durham's music industry has the potential for even further growth. As the home to 74 music-related festivals and events, and the starting ground of notable artists like Shawn Mendes, Dizzy, Lindsay Schoolcraft, k-os, Meghan Patrick, and Boi-1da, Durham Region has a strong foundation from which to grow.

---

<sup>1</sup> These figures comprise the total economic impact of Durham region's music industry, including direct, indirect, and induced impacts.



# 469+

*Number of music assets in Durham (not including artists)*

At the time of this study, Durham has more than 469 music-related assets, including venues and music spaces, businesses, organizations, music industry professionals, celebrations, festivals, and events.

Moreover, there is a growing demand for more music-related opportunities, reflecting an appetite for diverse genres and expanded venues across the region. The region's music scene, though dominated by rock, folk, indie, and country, also supports niche genres such as underground punk. The region also benefits from a highly experienced pool of music professionals, many having over 16 years of experience according to survey findings, which helps to foster mentorship and talent development. Educational institutions, like Durham College's music programs, contribute to the region's music culture and workforce. Additionally, Durham's proximity to Toronto offers both competitive advantages and complementary resources, positioning it as an affordable, vibrant alternative for music tourism and performances.

While Durham's strengths point to numerous opportunities, the music industry also faces challenges which reveal several areas of need. Insufficient policies that are music friendly, a lack of varied performance and rehearsal spaces, a lack of available business supports, and limited funding hinder the growth of local artists and businesses. The region struggles with talent and audience retention, as many artists move to Toronto for more opportunities, while audience engagement is dampened by logistical issues (especially related to travel) and the absence of significant promotion and awareness. Even though the region is home to diverse genres, there is an overall lack of representation and awareness of genres beyond rock, folk, indie, and country. Moreover, rising cost of living, infrastructure limitations, and post-pandemic challenges add further strain. Many of these challenges are not unique to Durham but are systemic challenges facing the music industry across Canada.

However, there is opportunity to address these challenges and strengthen Durham's music industry through progressive changes and targeted support. This study outlines several opportunities, summarized by the following key priority areas. These priorities, and the opportunities they present, provide the building blocks from which a future music strategy could be developed.

**Figure 1: Key Priority Areas for Durham's Music Industry**





Springtide Music Festival at Second Wedge Brewing Company

## Introduction

In 2023, the Regional Municipality of Durham launched *Ready, Set, Future: A PLACE Blueprint for Durham*, a five-year economic development and tourism strategy that highlights music as a key sector within the region's priority arts, culture, and creative industries cluster. The findings contained in this report lay the groundwork to develop a strategy that strengthens Durham's music industry, in line with *Ready, Set, Future*.

**Ready, Set, Future – Action 4.2.3: Enable growth in the music industry through the development of a strategy to become a Music Region.**

Music in Durham reflects the vast and varied nature of the region, spanning 14 downtown areas and eight municipalities – Ajax, Brock, Clarington, Oshawa, Pickering, Scugog, Uxbridge, and Whitby. The region is home to several music festivals and events, musicians, equipment manufacturers, rehearsal spaces and performance venues. As of the release of this report, there are **469** music assets in Durham (not including musicians), and this number continues to grow as the industry evolves.<sup>2</sup> Moreover, Durham has already produced internationally recognized acts such as Shawn Mendes, Dizzy, Lindsay Schoolcraft, k-os, Meghan Patrick, and Boi-1da, showcasing the region's potential as a hub for music talent.

---

<sup>2</sup> Please see the Industry Asset List in Appendix A.



A thriving music industry in Durham could yield significant benefits for the region. Music is a key economic driver, creating employment, attracting tourism, and boosting local businesses.<sup>3</sup> It increases quality of life for communities by providing connection, cohesion, and cultural expression, often bridging diversity and promoting inclusivity.<sup>4</sup> Music also plays a role in placemaking and urban development, helping to cultivate a brand and identity, and making the region a more attractive place to live, work, play, and invest.<sup>5</sup>

This report provides an analysis of Durham’s current music industry landscape, identifying its strengths and value proposition, gaps and challenges, and areas for future growth. It also establishes a benchmark of the sector’s economic impact and outlines key priority areas and success metrics to inform the future development of a music strategy.

## Methodology

### Durham Music Industry Forums

Invest Durham held three separate industry forums in November 2024, inviting participation from a range of music students, industry professionals, Invest Durham staff, and other music stakeholders. Forums took place in Ajax, Oshawa, and Uxbridge to support access and encourage participation from across the region. The forums included musical performances, a keynote address, and roundtables facilitated by Invest Durham, with research questions provided by Nordicity, detailed below. Approximately **404** individuals were engaged through these forums.

**Table 1: Music Industry Forum Discussion Questions**

Theme	Prompting Questions
Strengths	What is unique about the music industry in Durham? What advantages does Durham have over other jurisdictions? What are Durham’s best music assets?
Opportunities	Are there any music-related need(s) that could be better addressed in Durham? How? What could Durham learn from other jurisdictions? How can Durham stand out?
Weaknesses	As those who work in the industry, what are your biggest challenges and needs? What is Durham missing when it comes to music? What expertise, assets, and/or offerings are lacking in Durham?
Threats	What trends could cause Durham problems in the future?

<sup>3</sup> The Guardian. 2024. [“Economic impact of UK live music industry hits record £6.1bn”](#)

<sup>4</sup> UK Music. 2022. [“The Impact of The Music Industry.”](#)

<sup>5</sup> IFPI and Music Canada. 2015. [“The Mastering of a Music City.”](#)



What do you think Durham’s industry will look like in 5- or 10-years’ time? What do you hope has changed/what needs to have changed?

## Desk Research

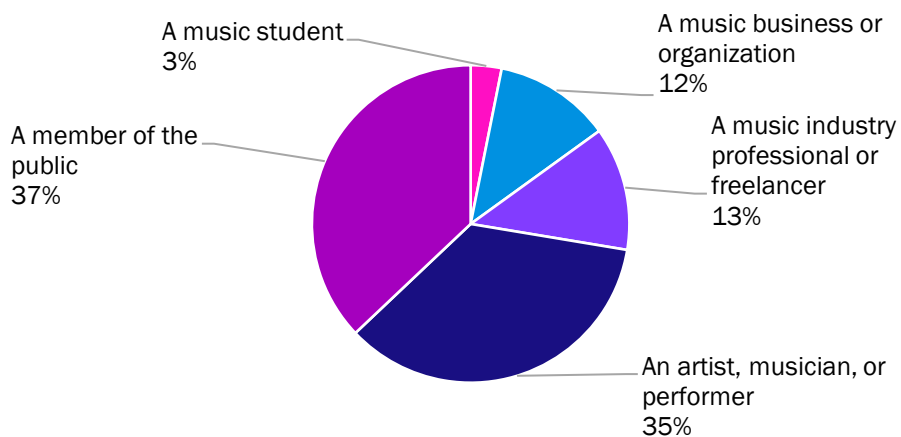
Nordicity reviewed relevant regional strategies and resources, including *Ready, Set, Future: A PLACE Blueprint for Durham*, *Envision Durham: Regional Official Plan*, various online resources through Durham Region, Invest Durham, and Durham Tourism, and where possible, relevant strategies from the municipalities within Durham (such as *Culture Counts: Oshawa Arts, Culture and Heritage Plan 2014*). Nordicity also conducted a high-level review of major industry trends driving change in the music sector. This research complemented other data collection streams to set the context surrounding the region’s local music industry. To develop a policy review guide for Durham Region, Nordicity also leaned on external resources and past expertise.<sup>6</sup>

## Durham Music Industry Survey

The **Durham Music Industry Survey** was available to the public from November to December 2024. The survey gathered both quantitative and qualitative data, including economic and social impacts, to help inform analysis on the strengths and needs of the sector. A total of **286** useable responses were received.<sup>7</sup>

Over half (60%) of respondents were from those directly involved in Durham’s music industry (such as on behalf of a music business or organization, industry professional or performer), while the remaining respondents (40%) were music students or members of the public.

Figure 2: Survey Respondent Type (n=286)



Source: Nordicity, Durham Music Industry Analysis Survey

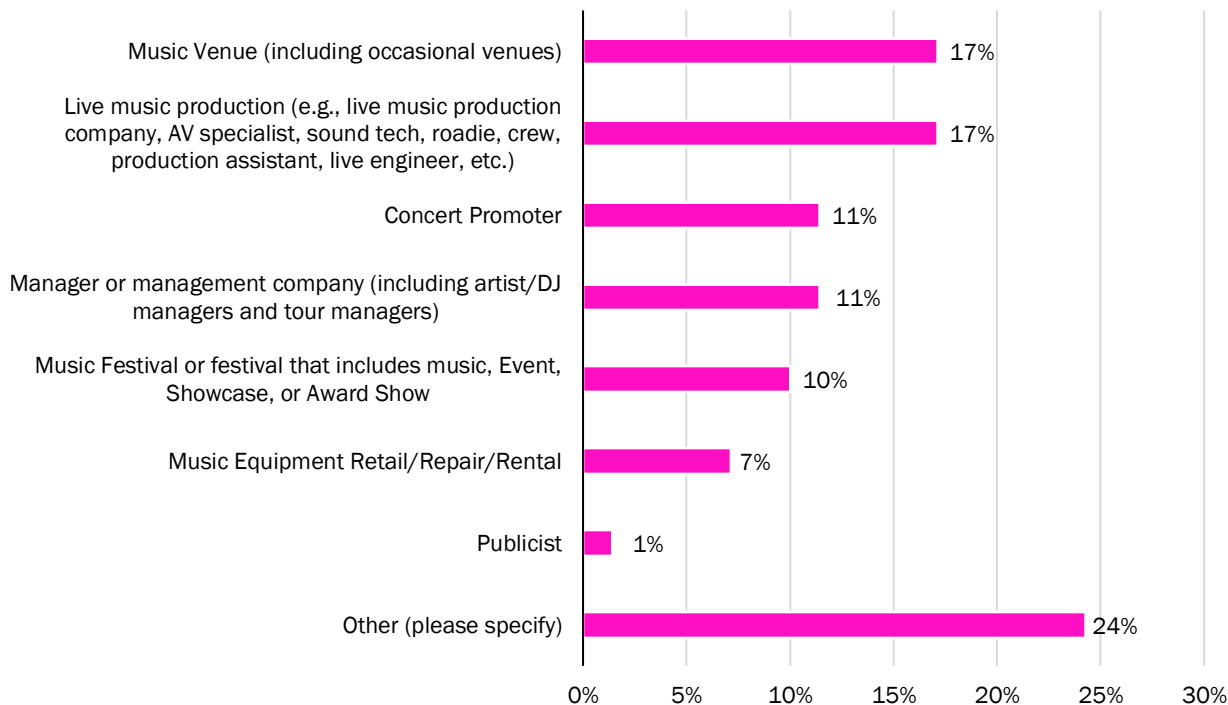
<sup>6</sup> Please see the Policy Review Guide in Appendix B.

<sup>7</sup> Full survey results are provided in Appendix C.



If respondents answered on behalf of a music business or organization, or professional or freelance music worker, they were asked to identify the primary role in the music industry. Representation was diverse, with a notable response rate from those with music venues (17%), and live music production (17%). Conversely, a limited number of responses were garnered from publicists (1%). Other responses varied widely, but the top responses included music consulting and music education.

**Figure 3: Primary Role in Music Industry (n=70)**



Source: Nordicity, Durham Music Industry Analysis Survey  
Note: Figures may not sum exactly to 100% due to rounding.

Business and professional or freelance respondents were also asked whether they had a secondary role in the music industry. 70 respondents indicated they do, with music marketing (36%) and promotion (29%) identified most frequently, suggesting that many music industry employees in Durham wear multiple professional hats.<sup>8</sup>

## Industry Asset List

Nordicity developed an asset list of Durham’s music industry, compiling basic information for all identifiable music assets in the region (e.g., businesses, spaces, organizations). This list supports a more holistic

---

<sup>8</sup> See Figure 9: Secondary Role in Music Industry (n=70)



understanding of the current state, size, and make-up of Durham’s music industry. (Key findings and categories from the asset list are described in Appendix A).

The asset list was populated using multiple tools including the D&B Hoovers Avention business database platform and the North American Industry Classification System (NAICS) codes. Publicly available lists were also consulted, including web listings and business registries, as well as industry forum registrations. The full asset list was submitted to Invest Durham as a living document, for ongoing upkeep and monitoring as Durham’s music industry evolves.

## Economic Impact Assessment

The economic impacts of music businesses and artists in the region were estimated using primary data collected via the Durham Music Industry Analysis Survey, select secondary research sources, and Nordicity’s proprietary MyEIA™ model.

To estimate the total number of music businesses, Nordicity leveraged findings from the industry asset list. To identify the total number music individuals in Durham, Nordicity used key informant approximations combined with Government of Canada Sector Specific estimates. Universe numbers used for the purpose of the economic impact assessment are a conservative estimate. The base year for data collection and analysis for economic impacts was 2023, drawing on 2021 census data.

Tourism spending and impacts in the region were estimated using secondary sources, primarily the Government of Ontario Tourism Regional Economic Impact Model (TREIM) and the Regional Tourism Profile: Region 6 (York, Durham, and Headwaters). To gain a best estimate of Durham’s share of tourism out of Region 6 Nordicity used the “7211 -Traveller Accommodation” NAICs employment data to allocate the tourism region visitor statistics. Durham Region accounts for 33% of Region 6’s total employment in the accommodation NAICs. Festivals/fairs and cultural performance person visits were used as music-related activities.



Ontario Philharmonic Orchestra at the Regent Theatre (photo credit: Marco Ayala)

## Durham's Current Music Ecosystem

The Durham region's current music ecosystem presents a unique blend of strengths and challenges that, combined, help shape its cultural and economic potential. With a strong foundation of passionate artists, experienced professionals, and eager audiences, the area is well-positioned to enhance its role as one of Ontario's vibrant music hubs. However, systemic issues threaten to hinder growth and engagement.

This section will provide a snapshot of Durham's music industry at present, pulling key findings from the Durham Music Industry Survey, Music Industry Forums, desk research, and the Industry Asset List.

### A Foundation for Growth

Durham demonstrates **significant potential** as an up-and-coming music hub, supported by a network of artists, venues, and audiences. A strong appetite for live music, combined with the presence of experienced professionals and established cultural assets, creates a foundation for future growth. These strengths highlight opportunities to expand the region's music ecosystem and position it as a key player in Ontario's broader cultural landscape. This sub-section will outline the strengths of Durham's local music industry; the sound footings from which the local music industry can grow.

**Music landscape:** The Durham region boasts a fair number of music assets, with the majority of identified assets concentrated in large urban centres such as Oshawa (22%), Whitby (21%), Pickering (19%), and Ajax (16%). However, smaller municipalities like Clarington (9%), Uxbridge (7%), Scugog (5%) and Brock (2%) also contribute to the region's music landscape, demonstrating that music has a meaningful presence



across the entire region. Important assets also include a total of 74 festivals and events (which includes those that showcase music, as well as those that include live music as a component but not the main feature), notably Oshawa Music Week, Durham Rock and Blues Festival, Convergence Oshawa, and Springtide Music Festival. The variety of pubs, cafes, theatres, town halls, and Concerts in the Park in Durham's 14 downtowns, as well as Mississaugas of Scugog Island First Nation annual Powwow, all support a thriving local music scene. Combined with recognized international musical exports, these assets are crucial for creating a vibrant music scene and attracting visitors to the region. The relative density of live music organizations and events reflects an existing culture infrastructure that can help anchor future growth. This broad base of activity demonstrates the Durham community's commitment to music as an integral part of its cultural identity.

**Cultural diversity:** The region's rich cultural diversity is shaping an evolving musical landscape, with artists who blend global sounds with local tradition to create a unique environment, and audiences who seek entertainment aligned with their heritage. Influences from Caribbean, South Asian, African, and Indigenous traditions mix with rock, folk, indie, and other popular local styles, resulting in genre-defying sounds that reflect the region's rapidly evolving and increasingly multicultural identity. This cross-pollination of styles is strengthening the creative fabric of Durham by helping to foster collaboration and amplify diverse voices.

**Music spaces:** There are places and spaces in the Durham region to attend live music. A total of 125 spaces and venues were identified in the industry asset list including 12 formal music venues (traditional venues such as theatres and performing arts centres), 45 live music venues (venues that frequently host live music such as bars, pubs, cafes, restaurants and clubs), and 68 occasional music venues (such as convention centres, banquet halls, parks, and arenas).<sup>9</sup> The region enjoys a handful of larger venues and convention centres that can accommodate more than 500 attendees, including the Tribute Community Centre, Ajax Convention Centre, the Harmony Event Centre, and Oshawa convention centres. With space being a foundational requirement for a thriving music scene, this existing collection of live music destinations lends to favourable conditions for growing and developing the local sector.

**Appetite for growth:** Engagement findings and survey responses reveal a strong desire among residents and professionals for more music-related opportunities – both in terms of professional opportunities and live events to attend. People have expressed interest in a broader variety of genres, venues, and events, suggesting an untapped demand that could support future sector development. This enthusiasm positions Durham as fertile ground for expanding music-related offerings which benefit audiences and industry workers alike.

**Experienced music professionals:** Approximately 68% of survey respondents who work in the music industry have over 16 years of experience, and 48% exceed 20 years of experience. These figures imply that the region is home to a seasoned talent pool. This depth of expertise not only lends to high-quality musical offerings but can also help foster an environment of mentorship and support for emerging professionals and artists, creating a potentially self-sustaining music ecosystem.

**Access to select resources:** Musicians in Durham report reasonable access to instruments and equipment, facilitated by several local businesses that provide rentals. This accessibility reduces barriers to

---

<sup>9</sup> Ibid.



entry for emerging artists and ensures that professionals can maintain their craft, even without substantial personal investment.

**Popular genres and subcultures:** While rock, folk, indie, and country music dominate Durham’s music scene, the region is also home to niche communities, like a small but active punk scene and other genres including blues, pop, and metal, which demonstrates diversity in musical tastes.<sup>10</sup> These subcultures can be leveraged to diversify the region’s offerings and appeal to broader audiences.

**Downtown Oshawa:** Almost three quarters of survey respondents (74%) identified Oshawa as a top destination for live music in Durham, followed by Whitby (21%) and Ajax (19%).<sup>11</sup> This finding may suggest that Oshawa has the most well-developed music infrastructure in the Durham region, positioning it as a prime hub for live music and offering significant potential to be better leveraged for intra-provincial cultural tourism. Downtown Oshawa is a particular highlight in Durham, with its compact layout and public transit making it ideal for hosting musical events. Proximity between venues, restaurants, and bars fosters a cohesive social experience that encourages attendance and community engagement with the local music scene. Conversely, other municipalities in the region may require additional support to develop or enhance their music infrastructure, which could help expand music offerings and stimulate local demand.

**Collaborative energy:** The Durham region’s artists share a sense of community and collaboration, creating opportunities for cross-disciplinary projects and mentorship. In fact, the high level of industry participation in this process itself is a testament to the collaborative energy and engagement in the sector. This network both enriches the cultural landscape and strengthens the professional ties that are crucial to sustain a growing music ecosystem.

**Education organizations and institutions:** Music education programs, especially those offered at the post-secondary levels, are crucial tools that help support local music scenes and grow the local talent pipeline to fuel growth of the sector over time. Durham College’s well-established Music Business and Music Business Management programs are assets that can be strategically leveraged and potentially expanded to help further support establishing the region as a hub for music activity. The Durham community has also expressed keen interest in expanding local music education opportunities for children and youth. Community music education initiatives in the region have also been available outside of schools, with one example being the School Alliance of Student Songwriters (SASS), a now-paused grassroots initiative that provided students guidance in the art of songwriting and opportunities to connect with other artists and peers.

**Proximity to Toronto:** While the region’s proximity to Toronto certainly creates competition, it also provides access to crucial infrastructure, audiences, and resources that can be seen as supplements to those available in Durham. Durham is well-positioned to frame itself as an affordable alternative for a number of key stakeholder groups: tourists seeking out high-quality musical experiences, artists seeking an affordable

---

<sup>10</sup> See Figure 19: Music Genres Experienced Live in Durham Region (n=264) in Appendix C.

<sup>11</sup> See Figure 22: Locations Frequented to See Live Music (n=264) in Appendix C.



complementary stop while on tour, or a release valve for Toronto festivals and venues when they are overbooked or otherwise searching for alternative space.

## Areas of Need

While Durham has notable strengths, it also faces critical challenges that hinder its potential as a thriving music ecosystem. These include systemic issues that are faced industry-wide, as well as more localized barriers. This section will outline the key music-related challenges, needs, and risks faced by Durham that, if addressed, could unlock future sector growth.

**Policy and support:** Current policies and bylaws in Durham do not appear to have been reviewed or presented through a music-friendly lens. Unlike its film industry resources,<sup>12</sup> Durham currently offers little in the way of centralized policy or procedural information relevant to the music industry (e.g., event permitting, temporary liquor licenses, patio music policies, street performer licensing), nor is there an obvious point of contact for industry personnel to ask those questions (whether that person would be at the regional or municipal level). Beyond this, survey respondents highlighted the need for improved access to professional supports such as marketing and grant-writing assistance, which are essential for the growth of local artists and businesses.<sup>13</sup> Adopting music-friendly support programs and policies can help the region capitalize on significant economic and cultural impacts that a thriving music ecosystem can offer.

**Music-forward space:** Despite a reasonable collection of music places and spaces as outlined above, survey respondents and engagement attendees report that Durham faces a shortage of varied performance and rehearsal venues, especially those that are smaller in size, in a condition that would allow for performances or rehearsals of reasonable quality, are affordable, or are accessible to all ages.<sup>14</sup> In fact, according to survey results, 54% of respondents rank the quality of rehearsal spaces as “poor” or “very poor,” and 36% rank the quality of venue spaces as “poor” or “very poor.”<sup>15</sup> This shortage of quality space limits growth of niche genres, limits youth engagement in the music scene, and isolates emerging musicians who need these platforms to grow.

**Funding:** According to survey findings, 67% of respondents rank funding sources in Durham as “poor” or “very poor.”<sup>16</sup> Stagnating funding from provincial bodies like the Ontario Arts Council and Ontario Creates, when combined with rising costs, has strained artists’ and organizations’ ability to support music initiatives. This lack of financial security hampers artists’ ability to operate in the music industry, especially in jurisdictions that don’t offer targeted financial music supports to supplement other funding. Funding opportunities available for musicians and music-focused initiatives are limited in Durham, despite desire in the local community to see funding for local musicians and organizations.<sup>17</sup> This unavailability of funding

---

<sup>12</sup> Invest Durham. “Filming In Durham.”

<sup>13</sup> See Figure 16: Business Support Needs (n=131) in Appendix C.

<sup>14</sup> See Figure 15: Music Space Needs (n=148) in Appendix C.

<sup>15</sup> See Figure 14: Music Attributes in Durham Ranked (n=171)

<sup>16</sup> See Figure 14: Music Attributes in Durham Ranked (n=171)

<sup>17</sup> See Figure 26: Music-Related Opportunities in Durham (n=261) in Appendix C.



opportunities pushes creative individuals to seek support and opportunity outside of Durham – for example, moving to different jurisdictions that may have financial supports available for music professionals.

**Talent and audience retention:** Many artists leave Durham for the proximate hub of Toronto, citing a lack of local opportunities, and audiences struggle with logistical issues (for example, travelling to and from music activities affordably, and efficiently) that can deter attendance at local offerings. Indeed, over half of survey respondents report seeking music performance offerings outside of the region,<sup>18</sup> pointing to an opportunity to re-capture these audiences and enhance the profile of Durham’s live music scene.

**Diversity of genres:** The music scene in Durham is heavily dominated by the well-loved rock and sing-songwriter genres. While these are popular genres that local audiences enjoy, other genres like hop-hop, jazz, and R&B are underrepresented. There is demand for more diverse offerings, but the lack of sufficient infrastructure (e.g., rehearsal spaces and small performance spaces that are both affordable and of high quality)<sup>19</sup> and funding for developing these kinds of acts limits their visibility and their ability to seek and grow an audience.

**Communication:** Broadly, there is a lack of visibility across the sector and the general Durham community, with nearly half (48%) of survey respondents citing “lack of awareness” of offerings as a barrier to participating in the Durham music scene.<sup>20</sup> This lack of cohesive and accessible communication contributes to fragmentation of the local music industry. Additionally, audiences in Durham heavily rely on word of mouth to discover new music offerings.<sup>21</sup> More specifically, the absence of a centralized digital hub for music in the region hinders event promotion and networking among the industry. This disconnect leads to missed opportunities for collaboration and audience engagement, undermining the music community’s cohesion.

**Prioritizing other sectors’ growth:** Engagement session attendees expressed concerns that policymakers may prioritize traditional commercial interests over creative initiatives, potentially stifling creative growth and innovation in the region.

**Affordability and economic pressures:** The rising cost of living – and more specifically, the rising cost of housing – makes it increasingly difficult for artists and industry workers to sustain music careers in the region, negating its appeal as an affordable alternative to larger, more expensive nearby cities. This financial strain threatens to erode the local talent pool and is acutely felt by new music graduates and younger professionals looking to make their start.

**Infrastructure limitations:** The community in Durham note that limited public transit options within Durham make it challenging for residents to attend events outside their immediate communities. While planned bus rapid transit systems may help to partially alleviate this challenge in the future,<sup>22</sup> the current

---

<sup>18</sup> See Figure 22: Locations Frequented to See Live Music (n=264) in Appendix C.

<sup>19</sup> See Figure 14: Music Attributes in Durham Ranked (n=171) and Figure 15: Music Space Needs (n=148) in Appendix C.

<sup>20</sup> Figure 25: Challenges or Barriers to Accessing Music in Durham (n=262) in Appendix C.

<sup>21</sup> See Figure 23: Discover New Music (n=263) in Appendix C.

<sup>22</sup> Metrolinx. [“Durham-Scarborough BRT.”](#)



perceived disconnect restricts audience reach and participation, particularly for the smaller jurisdictions where offerings are both fewer and less concentrated.

**Post-pandemic audience declines:** The lingering effects of the COVID-19 pandemic have reduced audience turnout overall, making it harder for venues, festivals, and artists to recover. A lack of large-scale cohesive strategies to re-engage audiences further compounds this issue.

**Business supports:** Local music business and artists report the need for more business supports to help with various aspects of their operations and offerings. According to survey findings, 59% of respondents ranked the availability of business-specific supports for the industry as “poor” or “very poor.”<sup>23</sup> Specifically, supports and resources related to marketing and promotion, grant writing assistance, and networking events are in high.<sup>24</sup> Introducing such supports would help alleviate certain challenges faced by Durham-based industry professionals, and help pave the way for sector growth.



Mississaugas of Scugog Island First Nation Annual Powwow

---

<sup>23</sup> See Figure 14: Music Attributes in Durham Ranked (n=171) in Appendix C.

<sup>24</sup> See Figure 16: Business Support Needs (n=131) in Appendix C.



Convergence Music and Art Festival

---

# Economic Impact Assessment

Music activities in the Durham region generate economic impacts that can be expressed in terms of gross domestic product, labour income, and employment impacts. These impacts come from expenditures from organizations, such as music businesses (e.g., festivals and events, record labels, recording studios) and music individuals (i.e., musicians), and they are composed of direct, indirect, and induced impacts. Music-related tourism impacts are provided as broader benchmarks.

## Key Terms

**Gross domestic product (GDP):** GDP is a primary economic measure that reflects the total monetary value of all goods and services produced within a country. The production of goods and services by industries and organizations directly contributes to a jurisdiction's GDP.

**Labour income:** The total earnings or wages received by workers from a particular economic activity. Employment is expressed in terms of **full-time equivalent jobs (FTEs)**, where an FTE is defined as work as someone who works a 40-hour work week, approximately 52 weeks a year. Employment impact is not a measure of the number of people employed.

**Direct impact:** The GDP, employment, and labour income that comes from salaries and wages paid to or generated by those who work in the music sector, as well as any profits earned.



**Indirect impact:** The GDP, employment, and labour income generated within the supply chain, as businesses purchase goods and services to support their operations.

**Induced impact:** The GDP, employment, and labour income generated by workers (i.e., those who have earned income at the direct and indirect impact stages) spending their wages on everyday household goods and services.

**Total impact:** The sum of direct, indirect, and induced economic impacts.

## Total Economic Impact

In 2023, music in the Durham region generated a total economic impact of over **\$163 million in GDP**, **\$110 million in labour income**, and supported approximately **4,895 FTEs**. These figures include the total direct, indirect, and induced impacts generated by the music industry.

Table 2: Summary of Economic Impacts of Music in Durham Region, 2023

Category	Business Impacts	Music Individual Impacts	Tourism Impacts	Total Impact (Business + Music Individual + Tourism Impacts)
Employment (FTEs)	4,067	704	124	4,895
Labour Income	\$96,667,000	\$7,899,000	\$5,842,000	\$110,408,000
Gross Domestic Product	\$138,849,000	\$13,450,000	\$10,673,000	\$162,972,000

Source: MyEIA™

## Business Impacts

Music businesses generate a significant amount of impact for the Durham region, contributing to over \$138.8 million in GDP. The labour income impact of businesses was an estimated \$96.7 million, and the total employment supported by these organizations is an estimated 4,067 FTEs. Music businesses in the Durham region directly employ approximately 3,422 FTEs and support 488 indirect and 156 induced FTEs.

Table 3: Economic Impacts of Music Businesses in Durham Region, 2023

	Direct Impact	Indirect Impact	Induced Impact	Total Impact
Employment (FTEs)	3,422	488	156	4,067
Labour Income	\$53,003,000	\$33,382,000	\$10,282,000	\$96,667,000



<b>Gross Domestic Product</b>	\$62,489,000	\$54,921,000	\$21,439,000	<b>\$138,849,000</b>
-------------------------------	--------------	--------------	--------------	----------------------

Source: MyEIA™

## Music Individuals' Impact

Music individuals such as musicians and freelance music workers living and working in the Durham region also contribute to the area's economic impact, with workers work contributing approximately \$13.4 million in GDP. The total labour income impact of music individuals was an estimated \$7.9 million, and the total employment is an estimated 704 FTEs. Music individuals in Durham directly employ approximately 650 FTEs and support 40 indirect and 14 induced FTEs.

Table 4: Economic Impacts of Music Individuals in Durham Region, 2023

	Direct Impact	Indirect Impact	Induced Impact	Total Impact
<b>Employment (FTEs)</b>	650	40	14	<b>704</b>
<b>Labour Income</b>	\$4,286,000	\$2,700,000	\$913,000	<b>\$7,899,000</b>
<b>Gross Domestic Product</b>	\$7,105,000	\$4,441,000	\$1,904,000	<b>\$13,450,000</b>

Source: MyEIA™

## Tourism Impacts

Music is a driver of tourism, where spending and travel activities generate significant economic impact for a jurisdiction. Cultural tourism, which includes music through live performances, festivals, and concerts as recognized by Statistics Canada, is one of the largest and fastest-growing tourism markets. For instance, research conducted by Forum Research and the Canada Council for the Arts on Arts and Culture Tourism in Ontario found that<sup>25</sup>:

- The average arts and culture trip has nearly triple the economic impact of non-arts and culture trips.
- Arts and culture tourists not only spend more, they stay longer and are more likely to be from overseas.
- Attending cultural performances, such as concerts, festivals, and fairs, are key activities.

These high-level findings on cultural tourism and performance point to the impacts that tourism has in strengthening the attractiveness of destinations.

<sup>25</sup> Ontario Arts Council and Forum Research. 2023. ["Ontario Arts and Culture Tourism Profile."](#)



Moreover, a recent study by Canada Live Music Association (CLMA) and Nordicity, which looked at the impacts of live music in Canada more broadly, found that the economic impacts of music tourism spending are significant, with an estimated **total GDP impact of \$8.93 billion** nationally.<sup>26</sup> This impact is expected to grow even further from 2024 onward as tourism related to live music continues to expand.

At the Durham region level, music (particularly live music performances and concerts) plays a role in driving tourism. It was found that approximately 74,500 annual visits are made to and within the Durham region that involve participating in festivals/fairs or cultural performance activities.<sup>27</sup> From large-scale festivals to intimate local shows, music events in Durham attract both residents and visitors alike. These events not only highlight the rich cultural landscape of Durham but also contribute to local economies by drawing tourists, supporting hospitality services, and promoting the region as a dynamic destination for music lovers. The impact of live music extends beyond entertainment, fostering a sense of community and showcasing Durham as a key player in Ontario’s music scene.

The economic impacts of tourism spending in Durham are notable, with an estimated **total GDP impact of over \$10.7 million**. The total labour income impact of music related to tourism spending in Durham was an estimated \$5.8 million, supporting around a total of 124 FTEs.

Figure 4: Economic Impacts of Music Tourism in Durham

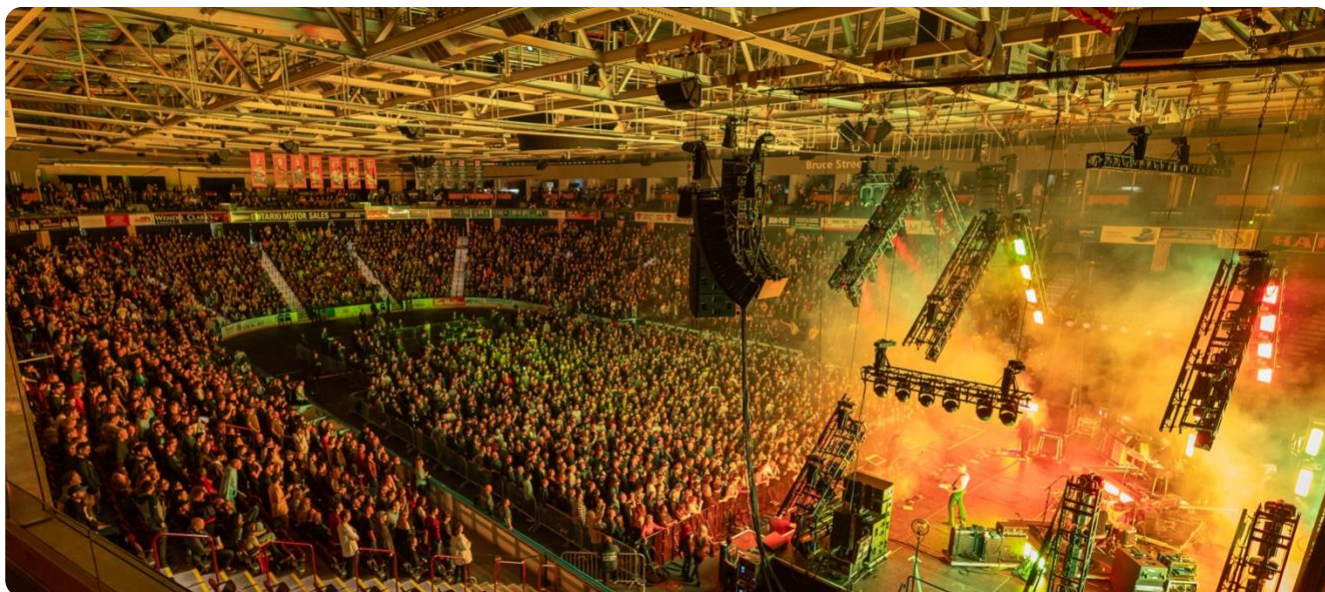
	Direct Impact	Indirect Impact	Induced Impact	Total Impact
<b>Employment (FTEs)</b>	101	13	11	<b>124</b>
<b>Labour Income</b>	\$3,858,000	\$954,000	\$1,031,000	<b>\$5,843,000</b>
<b>Gross Domestic Product</b>	\$7,512,000	\$1,433,000	\$1,728,000	<b>\$10,673,000</b>

Source: TREIM

Additionally, Durham Music Industry Analysis Survey findings identified that **the average individual spends approximately \$138 a year on live music in the Durham region**. If half of all adult Durham residents aged 19 to 65 were to spend this same amount on live music, it would result in an estimated \$28.85 million in spending. Moreover, survey results indicate that **an individual spends approximately \$90 out in the community before and after a music event in the Durham region**. This spending highlights the significant broader economic impact that live music events and performances have on the local communities.

<sup>26</sup> Canada Live Music Association, 2024. “Hear and Now: Impacts of the Live Music Industry in Canada.”

<sup>27</sup> To gain a best estimate of Durham’s share of tourism out of Region 6, Nordicity used the “7211 -Traveller Accommodation” NAICs employment data to allocate the tourism region visitor statistics. It was found that the Durham Region accounts for 33% of Region 6’s total employment in the accommodation NAICs. Festivals/Fairs and Cultural Performance person visits were used as music-related activities. Visits encompass all trips, both from within and outside the region, where the travel distance is 40 kilometers or more, whether for overnight stays or same-day excursions.



Queens of the Stone Age, Tribute Communities Centre (photo credit: William Balfour/Oak View Group)

## Outlook on Durham's Music Industry

By leveraging existing strengths and strategically addressing its challenges, Durham can unlock significant potential for its music ecosystem, bringing about greater economic returns and positive impacts for the broader community.

This section highlights where opportunities for growth exist in Durham's music industry, helping to further its goal of becoming a "Music Region." These opportunities are framed as key priority areas and are accompanied by a series of outcomes to measure future success, serving as potential building blocks for a future music strategy and action plan.

### Key Priority Areas

The following key priorities for Durham's music industry emerged from the research findings. Each area is described further below, outlining potential opportunities that could remove barriers, build on successes, and drive future growth.

Spaces & Places

Visibility & Celebration

Supportive Ecosystem

Connection & Collaboration

Talent Pipeline & Skill Building



## Spaces and Places

There is both opportunity and need to improve spaces for rehearsal and performance in Durham. Spaces and places are central to a healthy music industry. Without them, artists would not be able to hone their craft and develop a following. Moreover, music venues provide significant employment opportunities for many professionals (e.g., engineers, booking agents, promoters) within the industry.

The following opportunities exist:

- Support the establishment of all-ages venues that are accessible to all, including youth and older audiences, to meet an existing gap in inclusive venues (particularly for those under the drinking age).
- Activate public spaces across the region for music activities (e.g., public libraries in each municipality, parks and conservation areas along the Great Lakes Waterfront Trail), to increase access and vibrancy particularly along the lakeshore.
- Repurpose vacant, commercially owned facilities through municipal levers (e.g., tax incentives) into music-forward spaces like pop-up venues or rehearsal hubs. Leveraging spaces in this way also helps to activate underutilized urban areas, leading to improved neighbourhood vibrancy.
- Support the creation of new performance and rehearsal space across the region, especially small to medium size venues, through municipal policies and incentives.

## Visibility & Celebration

Opportunity exists to enhance the visibility and celebration of Durham's local music industry within the region and beyond. Better promotion would help entice residents and visitors to attend events and festivals, which would lead to increased spending in the region, attracting business to local areas where music activity is taking place, and enhanced urban vibrancy.

There is opportunity to:

- Champion local artists, success stories, and diverse genres in the region as a way of supporting and reflecting the region's changing music landscape and evolving demographics. As new artists contribute to and transform the local music landscape – especially students who bring diverse music and artistry – there is opportunity to better showcase and celebrate talent. As an example, this could include organizing dedicated storytelling campaigns through events, social media features, and collaborations with local media outlets, production companies, and on transit (e.g., Go Transit). Spotlighting local talent in creative and compelling ways can foster a sense of community pride, amplify the visibility of Durham's music diversity, and attract interest to Durham's music scene.
- Better integrate music activities into regional and provincial tourism communications (e.g., Destination Ontario, Central Counties Tourism). Creating targeted promotional content showcasing Durham's music events and venues through official tourism channels can raise the region's profile, positioning it as a key music destination in Ontario.



- Explore partnerships with community organizations to enhance awareness of Durham’s music offering. As one example, Durham Region could partner with Welcome Centres (e.g., Ajax Welcome Centre, Pickering Welcome Centre) to develop packages or communications that would ensure all newcomers to the region know where to find information about music events and festivals.
- Consider Region-led opportunities to support the development of music-centric festivals and events throughout other municipalities in the region, drawing inspiration from successful models in Oshawa (e.g., Convergence Oshawa, Oshawa Music Week). The development of a dedicated Festival Incubator – the exploration of which is a noted recommendation in Durham Region’s *Ready, Set, Place* strategy – could help to advance this opportunity.
- Integrate local artists into established festivals across the region, such as the Durham Region International Film Festival (DRIFF), and agricultural fairs in Orono, Blackstock, Uxbridge, Beaverton, and Port Perry.

### Supportive Ecosystem

To truly establish itself as a music region, there is a need for municipal supports that would remove barriers to success and strengthen the music ecosystem. Each municipal partner in Durham – Ajax, Brock, Clarington, Oshawa, Pickering, Scugog, Uxbridge, and Whitby – would need to play a role in establishing such municipal supports. In doing so, there is opportunity to apply similar practices from Durham’s film industry supports and policies to the music industry.

The following opportunities exist:

- Review bylaws and policies to ensure they are music-friendly, such as business licensing, noise bylaws, parking policies, zoning regulations, property tax policies, and heritage designations (see Appendix B: Policy Review Guide for a description of common policy improvements).
- Similar to the way that film permits in Durham are \$0 or revenue neutral,<sup>28</sup> there may be opportunity to consider \$0 or revenue neutral permits for festivals and events, event parking, or subsidized transit for event ticket holders to encourage live music activity and encourage audiences to attend shows.
- Establish a liaison and champion for the region’s music industry, exploring the opportunity to either assign the role to an economic development officer or establish a music office and officer to signal and strengthen industry support (similar to the Durham Region Film Commission).
- Consider establishing regional funding to support the growth of the music industry (e.g., supporting live music festivals, music entrepreneurship), and connecting the sector with fundraising and corporate sponsorship opportunities.
- Encourage the industry to leverage federal and provincial public funding support and resources for greater sector development (such as Ontario Creates’ Ontario Music Investment Fund (OMIF), Ontario

---

<sup>28</sup> Invest Durham. “[Filming in Durham.](#)”



Arts Council, Canada Council for the Arts, FACTOR, Musicaction) by providing workshops and increasing visibility of available opportunities.

- Create a one-pager and/or landing page on Invest Durham’s website to summarize the economic and social value of the region’s music industry, and position Durham venues as a valuable component of the Greater Toronto Area (GTA) for incoming live event producers/promoters. Such a landing page could be similar to the Filming in Durham page on Invest Durham.
- Support fair compensation initiatives for musicians and music industry workers while addressing broader cost of living challenges in Durham, including housing affordability and diversity of housing options – particularly higher density housing in commercial centres – to ensure the region remains an attractive place for talent retention.

### **Connection & Collaboration**

The Durham region is geographically spread out, which creates a need for greater connection among the music industry to support collaboration and enhance opportunities for musicians and music industry professionals. Additionally, there is potential for greater connection between music and audiences, and other creative sectors.

The following opportunities exist:

- Provide ongoing touchpoints with musicians and music industry workers in Durham (e.g., networking events, forums) to increase collaboration and visibility across the sector.
- Invite cross-sector collaboration, such as by fostering platforms for connection between the local music and film industry. Aligning film industry professionals with musicians and composers would help to support both ecosystems and provide mutually beneficial opportunities. The Durham Region International Film Festival (DRIFF) could be one such event in which such networking could occur. By increasing visibility across music and film sectors, there is opportunity to match-make local filmmakers with musicians to support music video production, and to invite opportunities for local composers to score media (e.g., film, TV, advertisements).
- Create a Durham-centric music database or central directory portal that includes musicians, music venues, venues and rehearsal spaces, equipment/instrument rentals, funding opportunities and federal/provincial grants to increase visibility, and better connect the music sector to opportunities.
- Continue to support public transit initiatives, such as the Durham-Scarborough BRT,<sup>29</sup> that would increase access across Durham’s eight municipalities, thus better connecting the music industry and encouraging audience attendance within Durham and neighbouring areas.

---

<sup>29</sup> Metrolinx. [“Durham Scarborough BRT.”](#)



- Foster greater collaboration between municipalities and find ways of sharing industry infrastructure to promote greater access across the region.
- Partner with other regions and cities in Ontario (e.g., Toronto, Kingston, Ottawa, Hamilton, Guelph, Brampton, Mississauga) to create venue networks and informal tour circuits, which can help attract talent to perform in Durham and increase vibrancy of Durham's venues.
- Support the development of music community programs that would extend outreach to underserved communities (e.g., seniors, youth, equity-deserving communities) and enhance community well-being. As an example, Durham Region could support music therapy initiatives, such as by connecting musicians with senior homes or with opportunities to deliver creative outlets for youth facing mental health challenges.

### **Talent Pipeline & Skill Building**

The region's music education programs, such as Durham College and the School Alliance of Student Songwriters (SASS) program, represent key foundational ingredients with which the Durham Region can strengthen its professional development and talent pipeline into the music industry.

The following opportunities exist:

- Connect music education programs (e.g., Durham College) with the region's variety of music businesses and organizations for potential volunteer, mentorship, and internship opportunities to encourage long-term involvement in music and help build future workforces. In supporting mentorship opportunities, Durham Region could explore the development of an Emerging Artist Incubator and could look to the Emerging Filmmakers Incubator hosted by DRIF and supported by Film Durham as an exemplary model.
- Promote the variety and viability of music careers to emerging professionals, such as through career fairs and/or by partnering with high schools and post-secondary institutions (e.g., Durham College) in the region.
- Support professional development in the industry, such as by providing skill-building workshops targeting topics for entrepreneurship and career sustainability (e.g., grant writing, business skills, taxes). As a potential avenue, Durham Region could explore collaborations with the Business Advisory Centre Durham (BACD), local entertainment insurance organizations, and music industry associations and funders to help deliver this critical programming.
- Promote national professional development and skill building initiatives, particularly for underserved communities, such as from Breaking Down Racial Barriers (BDRB), ADVANCE Canada's Black Music Business Collective, Women in Music, and Music Publishers Canada.
- Consider supporting the development of a distinct Faculty of Music at Durham College, that would offer aspiring musicians and music industry workers opportunity to hone skills across a range of courses, including performance, music education, theory, composition, music business, and music production.



Oshawa Music Week

## Measuring Future Success

The key priority areas mentioned above, and the opportunities they present, could bring about significant potential for Durham's live music industry. Below is a summary of the outcomes that could be achieved.

- Streamlined processes for music events and businesses, facilitating more music-related activities and creating a more music-friendly environment in Durham.
- Enhanced collaboration and knowledge-sharing across Durham's music industry and adjacent creative industries, fostering innovation and economic opportunities.
- Greater opportunities for emerging artists and industry professionals to build sustainable careers, strengthening Durham's music economy.
- Strengthened capacity to support artists at all career stages, from emerging to established, ensuring long-term industry growth and sustainability.
- Wider access to and awareness of music industry resources, supporting the growth and development of the local music scene.
- Expanded live music presence across diverse genres, styles, and cultures, enriching the region's cultural landscape and attracting tourists.
- Cross-industry collaboration that encourages synergy between music and other entertainment sectors, boosting Durham's profile as a multi-faceted cultural hub.
- Improved retention of music talent within the region, fostering a stable and thriving local music ecosystem.



- Enhanced recognition of Durham's diverse music offerings, positioning the region as a premier "Music Region" and a sought-after destination for both tourism and industry.
- Enhanced local and visitor spending on music-related activities, contributing to economic growth in the region.
- Growth in tourist activities within Durham, fostering a more dynamic and appealing destination for visitors.
- Increased foot traffic and urban vibrancy in downtown areas, driving economic activity and supporting local businesses.



The Doozies at Biltmore Theatre



---

# Appendices



## Appendix A: Industry Asset List

A total of **469 music assets** were identified. The table below presents a snapshot of music assets in the Durham region.

Table 5: Music Industry Asset List

Type	Category	Count
Spaces	Live music venues*	44
	Occasional venues*	69
	Formal music venues*	12
Businesses	Record stores	13
	Radio stations	3
	Music instrument and equipment stores	11
	Music manufacturers and/or repair	4
Professional Services	Record labels	2
	Recording studios and music production	33
	Rehearsal Spaces	3
	Music PR and media	6
Professional Individuals	Musicians/bands	<i>Not counted for this exercise</i>
	Music and talent managers	3
	Booking agents and promoters	6
	DJ services	31
Organizations	Non-profits, agencies, associations or societies	5
	Choirs	7
	Orchestras	2
	Dance schools	71
	Theatre companies	8
	Music schools and educational institutions	61
Celebrations and events	Music festivals and events	20

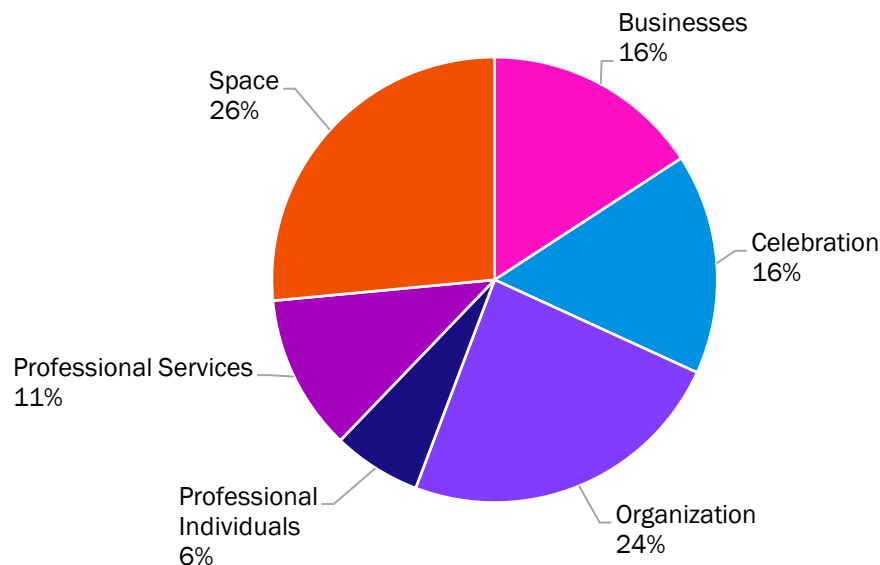


	Festivals and events that include live music	44
	Indigenous celebrations and events	3
	Cultural celebrations and events	8

\*Note: Formal music venues refer to traditional venues such as theatres and performing arts centres; Live music venues refer to venues that frequently host live music such as bars, pubs, cafes, restaurants and clubs; Occasional music venues refer to less traditional venues for music such as convention centres, banquet halls, parks, and arenas.

Per Figure 5: Total Assets (%) Breakdown by Type, the distribution of music-related assets in Durham reveals a diverse ecosystem, with spaces (26%), local organizations (24%) and celebrations (events and festivals) (16%), making up the largest portion of identified assets. Professional music-sector specific assets, such as businesses, professional services, and professional individuals, makes up about 34% of the total identified assets.

Figure 5: Total Assets (%) Breakdown by Type



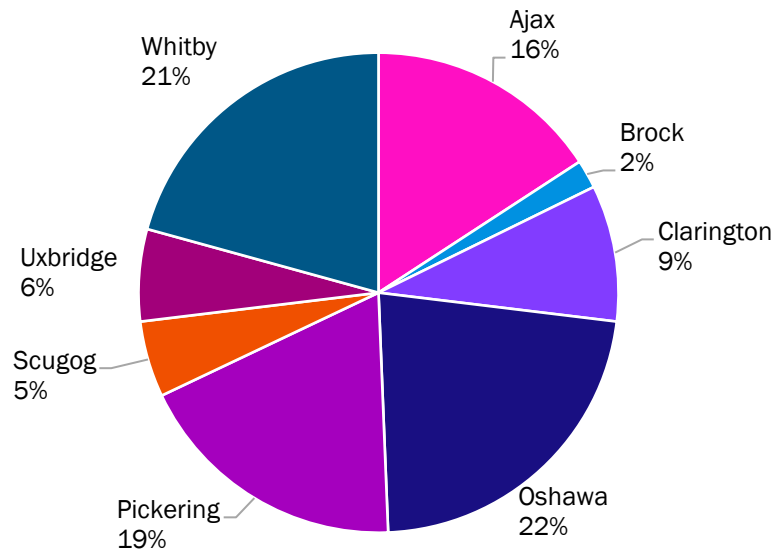
Source: Nordicity Research

Figure 6: Total Assets (%) Breakdown by Location reveals that most identified assets are concentrated in large urban centres such as Oshawa (22%), Whitby (21%), Pickering (19%), and Ajax (16%). However, smaller municipalities like Clarington (9%), Uxbridge (7%), Scugog (5%) and Brock (2%) also contribute to



the region's music landscape, demonstrating that music has a meaningful presence across the entire region.

**Figure 6: Total Assets (%) Breakdown by Location**



Source: Nordicity Research



## Appendix B: Policy Review Guide

This policy review guide outlines several common municipal bylaw and policy areas that can inadvertently create barriers for music industry growth. Recommended measures will vary somewhat based on jurisdiction, but the following section represents policy areas that are commonly addressed through strategic actions to support local music industries.

While this section references a few specific policies and procedures within Ontario and/or the Durham region, it does not represent a comprehensive account of relevant bylaws and policies in the eight Durham region municipalities. Rather, this section is intended to be used as a guide for municipalities in Durham to embolden their music industries and remove barriers by adopting music-friendly policies and procedures.

### **Business Licensing**

Municipal business licensing procedures can unintentionally constrain the growth of a live music scene by imposing rigid requirements that fail to account for the particularities of live music. For example, small- and medium-sized music venues will often either fall into the same licensing category as theatres, or else the same category as bars and restaurants, both of which can create challenges where the venue's operating model falls outside of those two categories. Likewise, small local music festivals can sometimes become mired in special events policies designed for larger fairs and markets that involve the sale of goods.

Music-friendly policy intervention could include creating a flexible live music business class, reducing licensing fees for cultural venues, or extending allowable operating hours for live music spaces. Municipalities may consider collaborating with impacted stakeholders (i.e., venue owners/operators, music promoters, local artists) prior to proposing any policy revisions to develop a better understanding of common challenges.

Downtowns can also be made more vibrant by street musicians, or buskers, provided that there is clarity on licensing for street performers. For example, the Towns of Ajax and Whitby both offer online applications for entertainers to perform at municipal events, but it is not immediately clear what regulations do or do not pertain to street performance outside of an event context. If the desire of the municipality is to have no restrictions on busking, then indicating as much on the municipality's website would provide assurance to prospective street performers that they are not at risk of being ticketed.

### **Festival and Major Event Permitting and Procedures**

Festival and major event permitting policies and procedures play a key role in shaping a city's ability to accommodate music festivals and events. To support these events, it is crucial that these policies and procedures are not only realistic and user-friendly, but that there is staffing support within local government to ensure smooth uptake and execution. Policies must address the logistical hurdles discussed elsewhere in this Policy Review Guide (e.g., parking, noise), which can dampen the feasibility of hosting large-scale music festivals and concerts. In addition, policies must be tailored for different types of events, to ensure that music festivals do not become mired in special events policies designed for larger fairs and markets that involve the sale of goods.

Municipalities the region, in collaboration with Durham Region, may want to consider reviewing festival and event permitting practices, perhaps in consultation with industry, to adopt an organizer-friendly approach



that reduces barriers to programming live music events. This review could draw upon current policies and processes from Durham’s film industry practices, such as parking management and proactive community notification and engagement.

Additionally, municipalities should seek to make detailed and user-friendly event procedure resources available online – again, similar to the production guides Durham Region provides for the film industry. While some of these resources are already available online (such as Oshawa’s Host an Event page),<sup>30</sup> a consistent approach across the region tailored to the music industry would equip music event organizers with clear expectations and regional best practices, signaling that Durham Region is “open for business” as a welcoming space for external event organizers and community organizers alike.

### **Noise Bylaws**

Noise bylaws in municipalities can sometimes suppress live music sector development by imposing restrictions that clash with the realities of live performance. Live music venues that are integrated within their communities or located near residential areas will often receive noise complaints, the fallout of which can introduce penalties or red tape that may limit their ability to nurture a local music scene. While venues may make earnest efforts to limit noise bleed from live music performances, it is not always possible to contain all live music sounds to the satisfaction of neighbouring property owners – especially in older legacy venue spaces that may not have been purpose-built to contain sound. Similarly, house concerts and outdoor music events play a critical role in fostering community vibrancy and local economic activity, yet they are often subjected to stringent noise limits.

To support a thriving music culture, municipalities could consider noise bylaw reforms that balance community concerns with the needs of the music ecosystem. Examples include setting realistic decibel thresholds, carving out exemption areas where nightlife takes place, providing exemptions or flexible permits for cultural events, and in some cases fostering dialogue between live music venue operators and residents to develop mutually acceptable solutions. Such approaches not only help mitigate conflicts but also recognize the broader benefits of live music for community well-being and local economies.

### **Parking Policies**

Parking bylaws can also present significant barriers to the success of a local live music scene by creating logistical challenges for both venue operators and performers. For instance, the lack of designated loading zones in front of or near music venues and/or studios can make it difficult for artists and production teams to transport heavy equipment efficiently. Similarly, restrictions on on-street parking or residential parking in areas near venues can deter audience members and create accessibility issues for touring performers, particularly those traveling with larger vehicles.

Municipalities can support the live music ecosystem by revisiting parking bylaws to address these challenges and researching additional parking options where applicable (i.e., arenas tend to have loading docks and large festivals tend to have event parking procedures, whereas small-medium sized venues typically have neither). Solutions could include designating loading zones in front of music venues, offering

---

<sup>30</sup> City of Oshawa – [“Host An Event.”](#)



parking permits for artist and crew vehicles, relaxing restrictions on residential and on-street parking near cultural venues, and supporting alternative transportation for audiences. Current parking procedures for on-location filming could be adapted for music industry activities, such as tagging cars connected with music event production.

## **Zoning Regulations**

Zoning regulations can significantly impact the viability of live music spaces by restricting their integration into existing communities and new development areas. Residential zoning areas often lack dedicated zones within them that would allow a live music space to exist, preventing them from becoming integral community spaces. Rapid housing growth and rezoning for residential development can often displace legacy live music venues by pricing them out of their communities or forcing land sale, forever reshaping the character of those areas. Redevelopment efforts that prioritize residential use over mixed-use zoning often fail to account for the impact on local cultural industries, forcing venues to relocate or close.

A music-friendly approach to zoning should promote mixed-use development that integrates live music venues with residential and commercial spaces, fostering density and vibrant communities. These policies can also address challenges outlined for noise and parking policies by planning for appropriate buffers, soundproofing, and parking capacity. Protecting legacy venues through zoning carve-outs and incentivizing their inclusion in new developments can ensure that live music remains a cornerstone of community life, even amidst urban growth and change.

## **Property Tax Policy**

Live music venues in Ontario currently fall under the commercial property tax class, grouped with other commercial property uses. In response to the ongoing financial challenges that live music venues are faced with, the City of Toronto made music venues eligible for the Creative Co-Location Property Tax Subclass, which reduces the tax burden for live music spaces by 50%.<sup>31</sup> This initiative was introduced to help alleviate costs for vital live music venues that are increasingly at risk of closure due to rising commercial real estate costs and land development pressures. The initiative also creates a tax incentive for property owners to lease their spaces to live music venue operators over other uses of their property.

To enable this policy, the Government of Ontario amended the *Assessment Act* with a Toronto-specific regulation. Durham Region could consider advocating to the province that they extend this amendment beyond Toronto, allowing for the creation of a similar property tax subclass in other jurisdictions in Ontario, such as the eight municipalities within Durham Region. By doing so, Durham Region could champion music-friendly taxation policy in Ontario by advocating for the adoption of this targeted approach to supporting live music venues within the region and across the province.

## **Heritage Designation**

While they vary based on jurisdiction, heritage designations offer a unique tool for protecting live music venues amidst urban development pressures. Under frameworks like the Ontario Heritage Act, municipalities can safeguard venues that hold historical or cultural significance. For example, venues with

---

<sup>31</sup> City of Toronto – [Creative Co-Location Facilities Property Tax Subclass](#).



rich histories of hosting renowned artists or fostering emerging talent can be recognized not only for their physical structures but also for their contributions to the local music ecosystem. Without such protections, live music spaces risk being displaced by redevelopment, particularly in areas undergoing change.

While some legacy live music venues may qualify for heritage designation on the grounds of their tangible assets, music-friendly heritage policies could include adapting existing designation processes to account for intangible cultural contributions, drawing on precedents like Toronto’s heritage designation of the Silver Dollar Room.<sup>32</sup> Municipalities in Durham may consider exploring the use of their various heritage designation mechanisms to preserve their musical heritage and retain critical venue spaces for the next generation.

### **Spotlight: Bill 23 (More Homes Built Faster Act, 2022)**

Bill 23 aims to increase housing development by moving existing planning approval responsibilities (for subdivisions, condominiums, land division, and part lot control exemption bylaw) from upper-tier regions to municipalities. Prior to the passage of Bill 23, Durham had already delegated these authorities to Pickering, Ajax, Whitby, Oshawa, and Clarington; Durham Region currently only holds planning approval responsibilities for the Townships of Brock, Scugog, and Uxbridge. Once Bill 23 is proclaimed, these three townships will assume this authority.

As it relates to the music sector, Bill 23’s impact will likely be minimal, though any transition of planning function to local municipalities could lead to variations in how municipalities within Durham prioritize or allocate resources for cultural development, absent a shared regional vision for the cultural and creative sector. Of note, the Regional Official Plan (“Envision Durham”) will become the official plan for municipalities within the region – who will have the power to repeal or amend it – upon proclamation. This plan includes a reference to fostering “cultural capital and a creative economy” in Chapter 3: Healthy Communities (p. 57).<sup>33</sup>

---

<sup>32</sup> Toronto Star – [Silver Dollar Room now a heritage site.](#)

<sup>33</sup> Durham Region – [Envision Durham: Regional Official Plan \(Consolidation December 13, 2024\).](#)



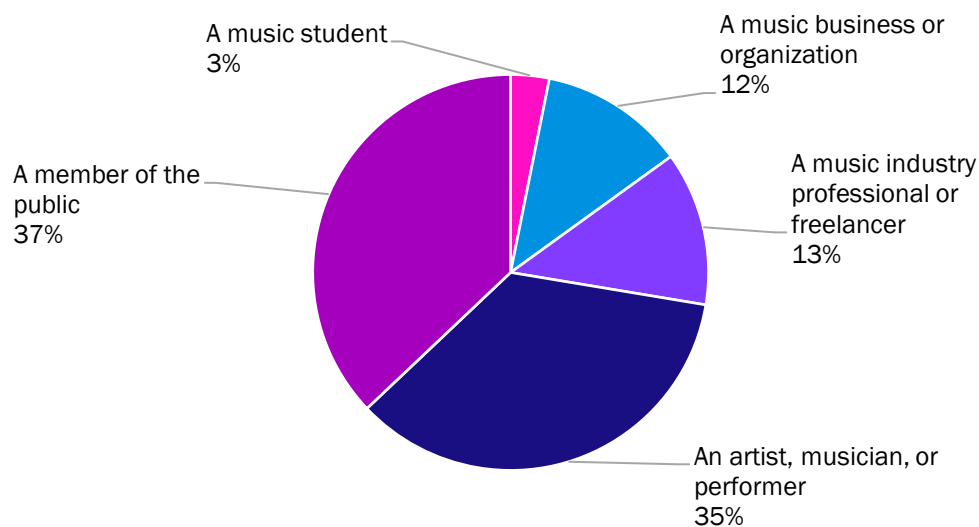
## Appendix C: Survey Results

The Durham Music Industry Survey was available to the public from November to December 2024. The survey gathered both quantitative and qualitative data, including economic and social impacts, to help inform analysis on the strengths and needs of Durham’s music sector. A total of 286 useable responses were received.

### Respondent Profile

37% of the respondents were answering as a member of the public; 25% as an artist, musician, or performer; 14% as a music industry professional or freelancer; 12% on behalf of a music business or organization; and 3% as a music student. Over half (60%) of the respondents were answering as someone who is currently directly involved in Durham’s music industry (such as on behalf of a music business or organization, industry professional or performer), while the remaining respondents (40%) were answering as someone who engages with music more generally in the community or seeking to eventually become directly involved in Durham’s music industry (such as a member of the public or music student).

Figure 7: Survey Respondent Type (n=286)

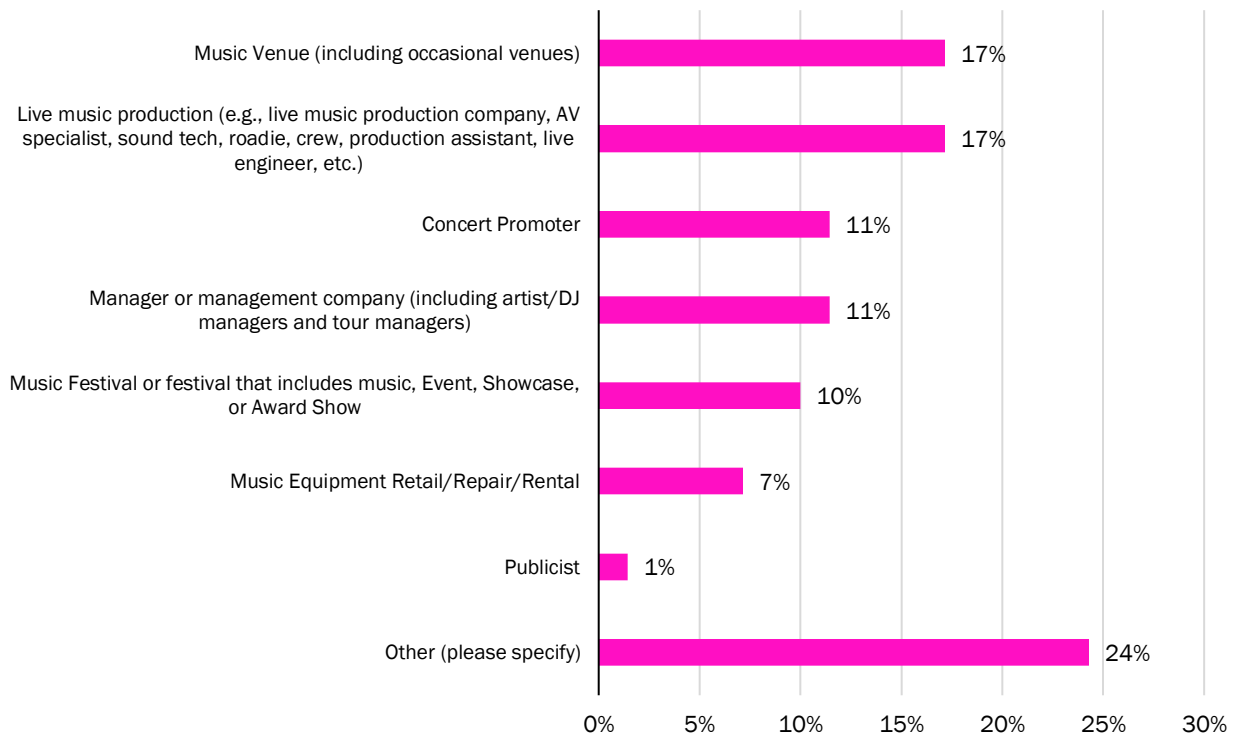


Source: Nordicity, Durham Music Industry Analysis Survey

If respondents answered on behalf of a music business or organization or professional or freelancer, they were asked to identify the primary role in the music industry. 17% of respondents were from a music venue, with a similar number of respondents identifying that they worked in live music production (17%). Additionally, 11% of respondents work in concert promotion, with a similar number of respondents saying they work in music management (11%). Other responses varied widely, but the top responses included music consulting and music education.



Figure 8: Primary Role in Music Industry (n=70)

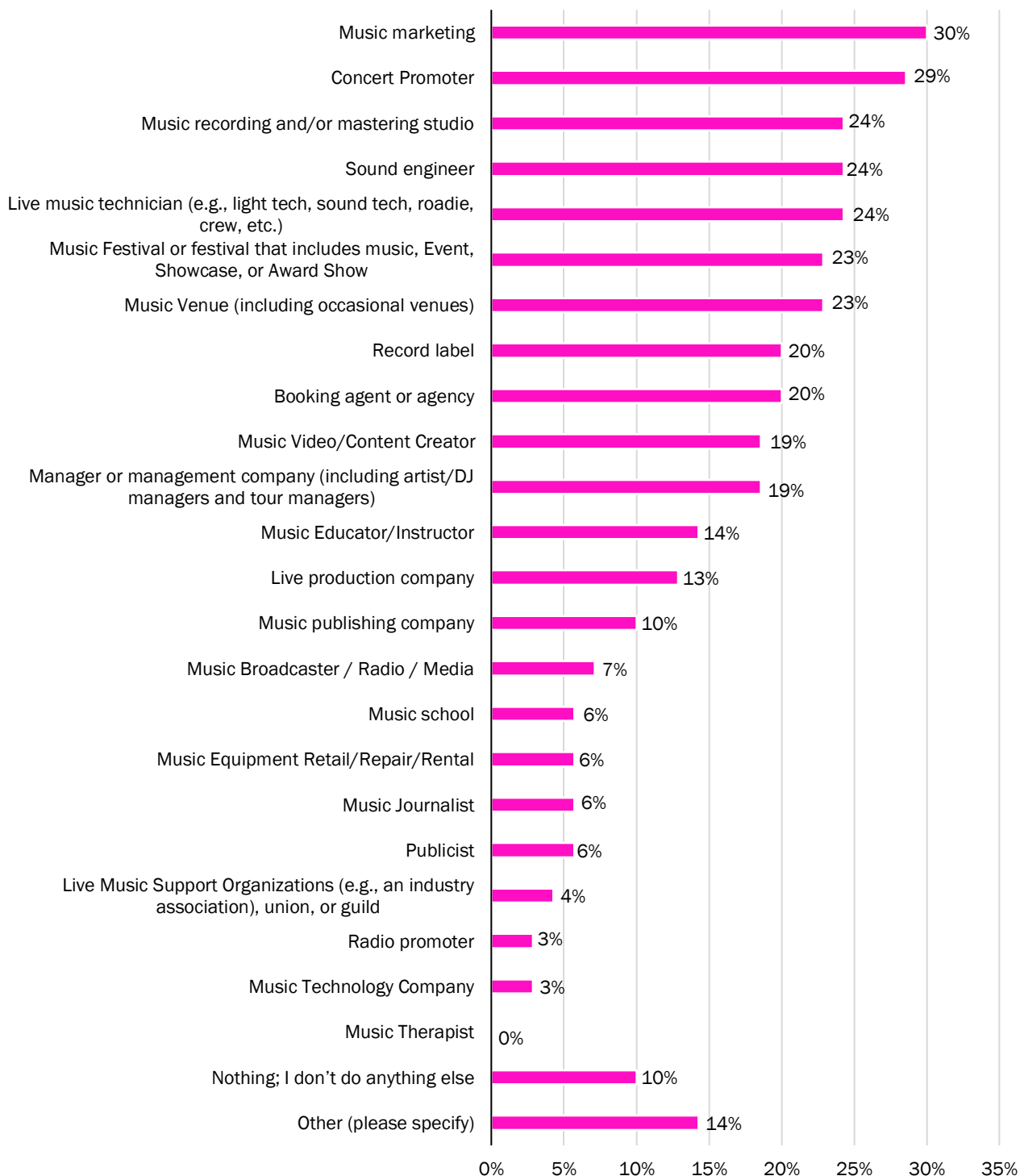


Source: Nordicity, Durham Music Industry Analysis Survey

Business and professional or freelance respondents were also asked whether they had a secondary role in the music industry. 70 respondents indicated they do, with music marketing (36%) and promotion (29%) identified most frequently, suggesting that many music industry employees in Durham wear multiple professional hats.



Figure 9: Secondary Role in Music Industry (n=70)

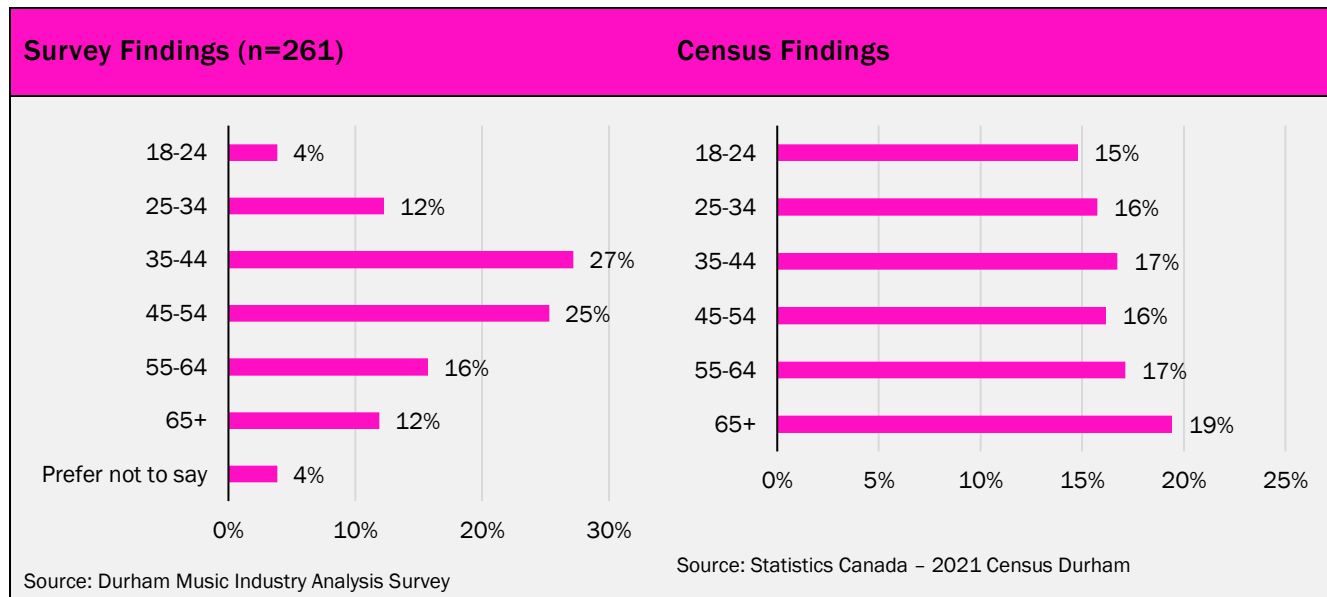


Source: Nordicity, Durham Music Industry Analysis Survey



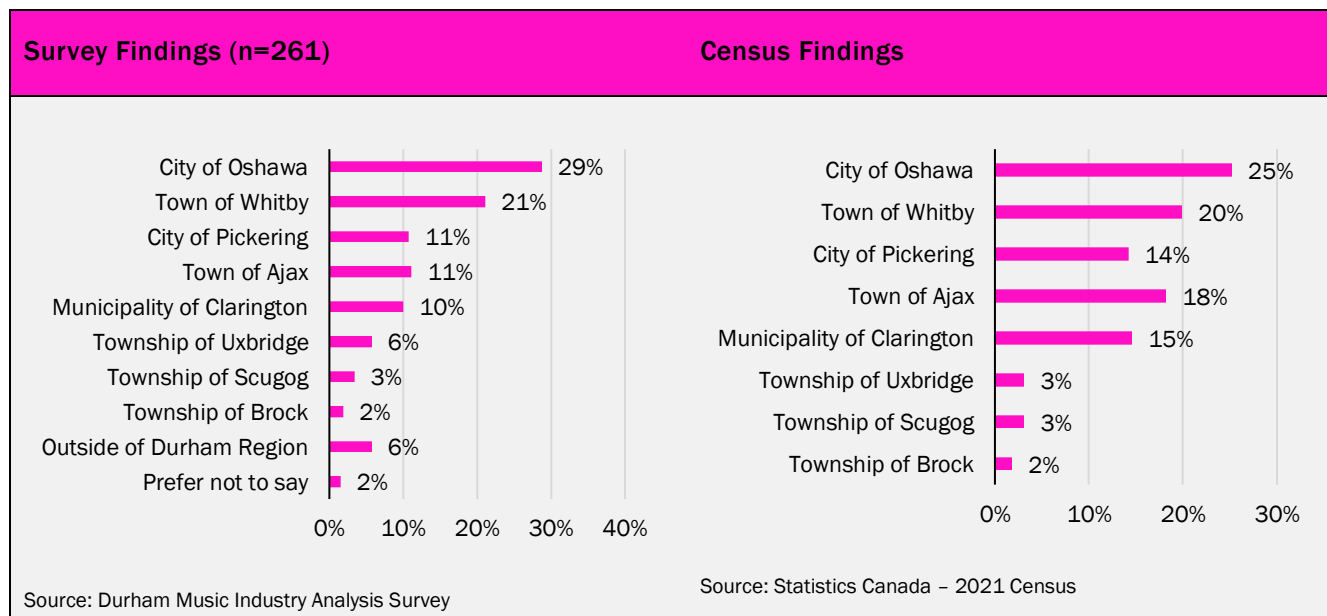
Overall, in relation to actual population, the survey garnered a relatively high number of responses from those between the ages of 35-44 and 45-54, but low rates for those between 18-24 and over 65+.

Figure 10: Survey Participant Age



29% of the respondents reside in Oshawa, followed by the Whitby (21%), Pickering (11%), and Ajax (11%). The survey achieved a fairly balanced representation of residents from across the Durham region.

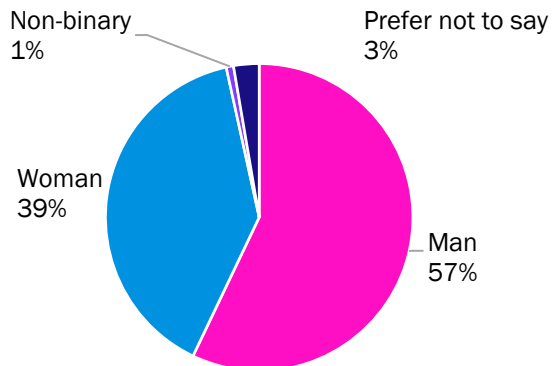
Figure 11: Survey Participant Residence





Regarding gender, 57% of survey respondents identified as man while 39% identified as woman. The results differ slightly and are reversed compared to the Durham region population, with 51% identifying as women and 49% as man.

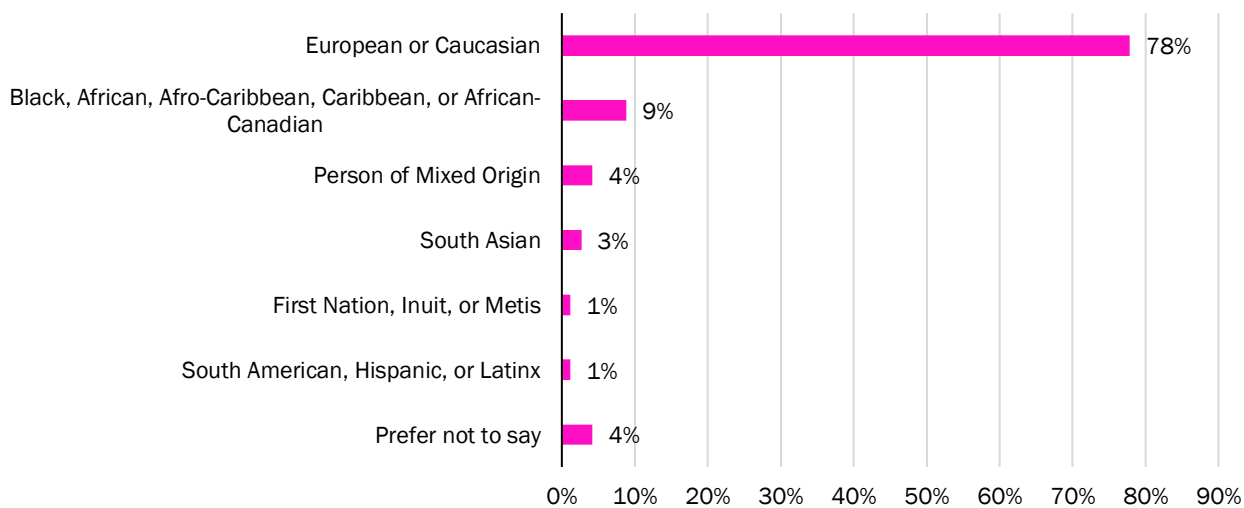
**Figure 12: Survey Participant Gender (n=261)**



Source: Durham Music Industry Analysis Survey

78% of survey respondents identified as Caucasian, as detailed in the figure below. Compared to Durham's population, survey respondents skewed more European/Caucasian.

**Figure 13: Survey Participant Self-Identify**



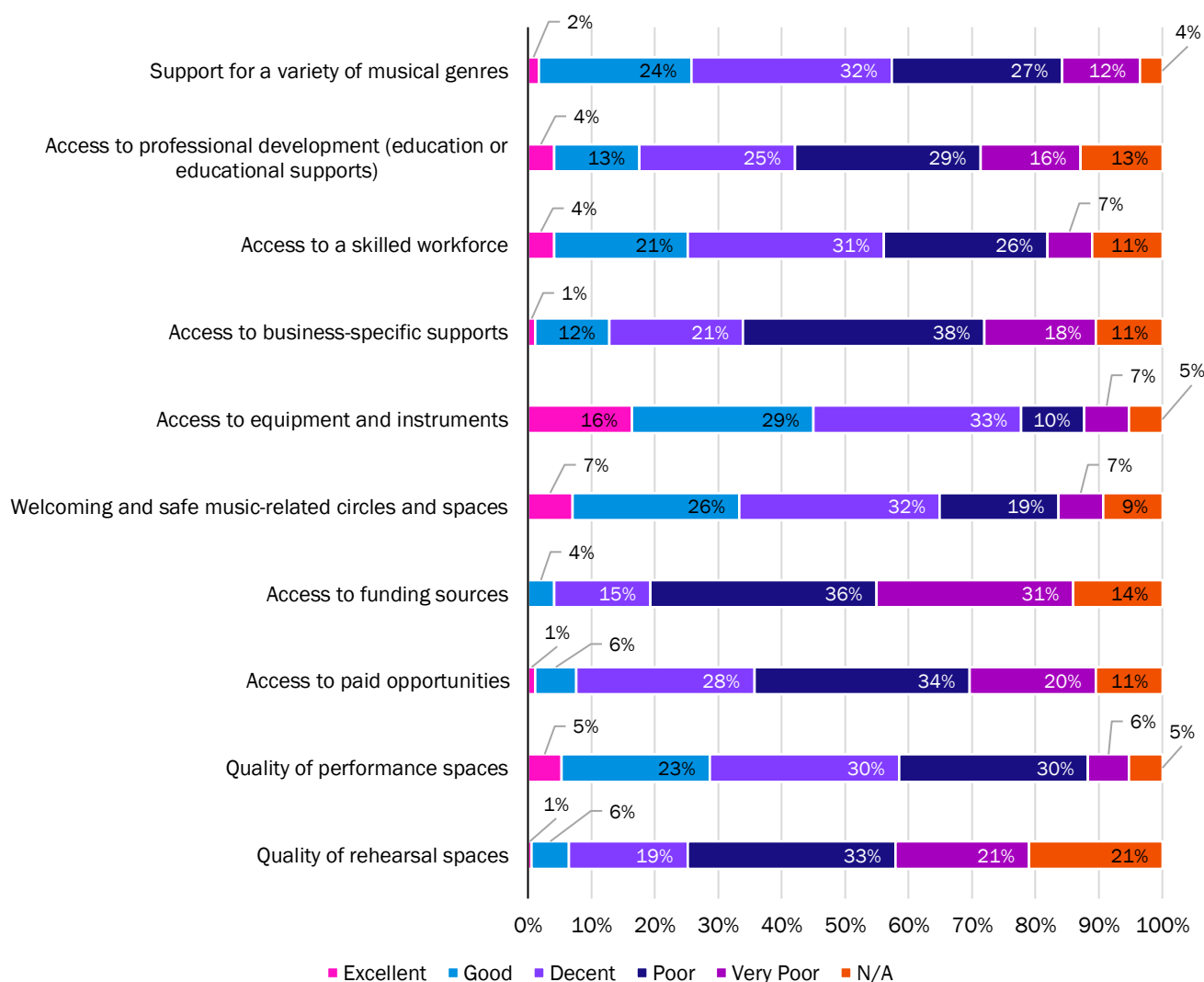
Source: Durham Music Industry Analysis Survey



## Durham Music Industry Questions

Music professionals (such as businesses and individuals) were asked to rate a variety of music attributes in Durham in terms of quality, access, and levels of support. Overall, while attributes such as ‘support’ and a ‘welcoming environment’ received positive ratings, aspects related to ‘access’ and ‘quality’ – specifically regarding resources, spaces, and opportunities – were rated poorly.

Figure 14: Music Attributes in Durham Ranked (n=171)



Source: Durham Music Industry Analysis Survey

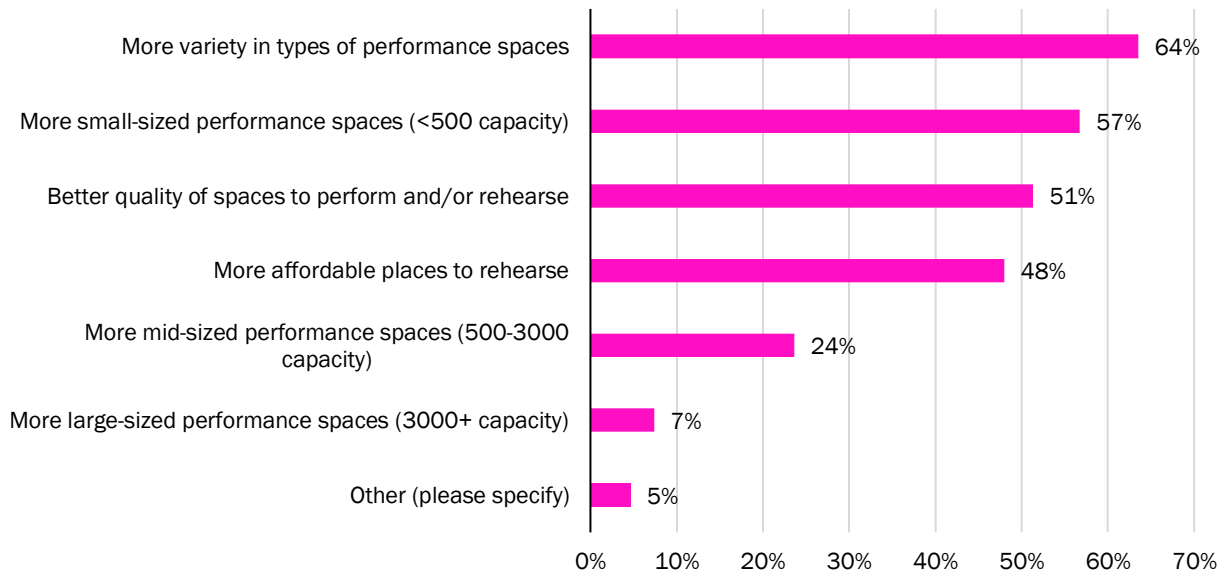
Newer artists (i.e., those with five or fewer years in the industry) rate the above attributes more positively than those who have been in the industry for over 20 years. This finding suggests there may be differing levels of awareness in terms of the supports, access, and quality of spaces available.

When asked about what is needed to improve music spaces in Durham, more variety in types of performance space (64%), more small-sized performance spaces (57%), better quality of spaces to



perform and/or rehearse (51%), and more affordable spaces to rehearse (48%) were most frequently identified among respondents. This finding points to how further support of spaces for all different stages of the creative process, from creation to performance, are needed.

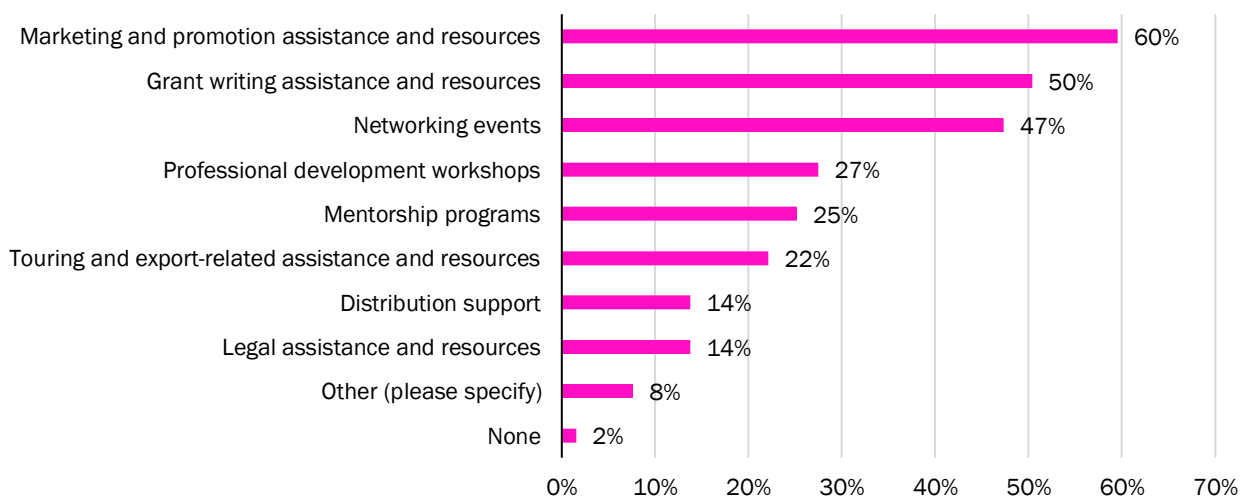
**Figure 15: Music Space Needs (n=148)**



Source: Durham Music Industry Analysis Survey

When asked what business-supports are most needed, marketing and promotion assistance and resources (60%), grant writing assistance and resources (50%), and networking events (47%), were the most frequently selected.

**Figure 16: Business Support Needs (n=131)**

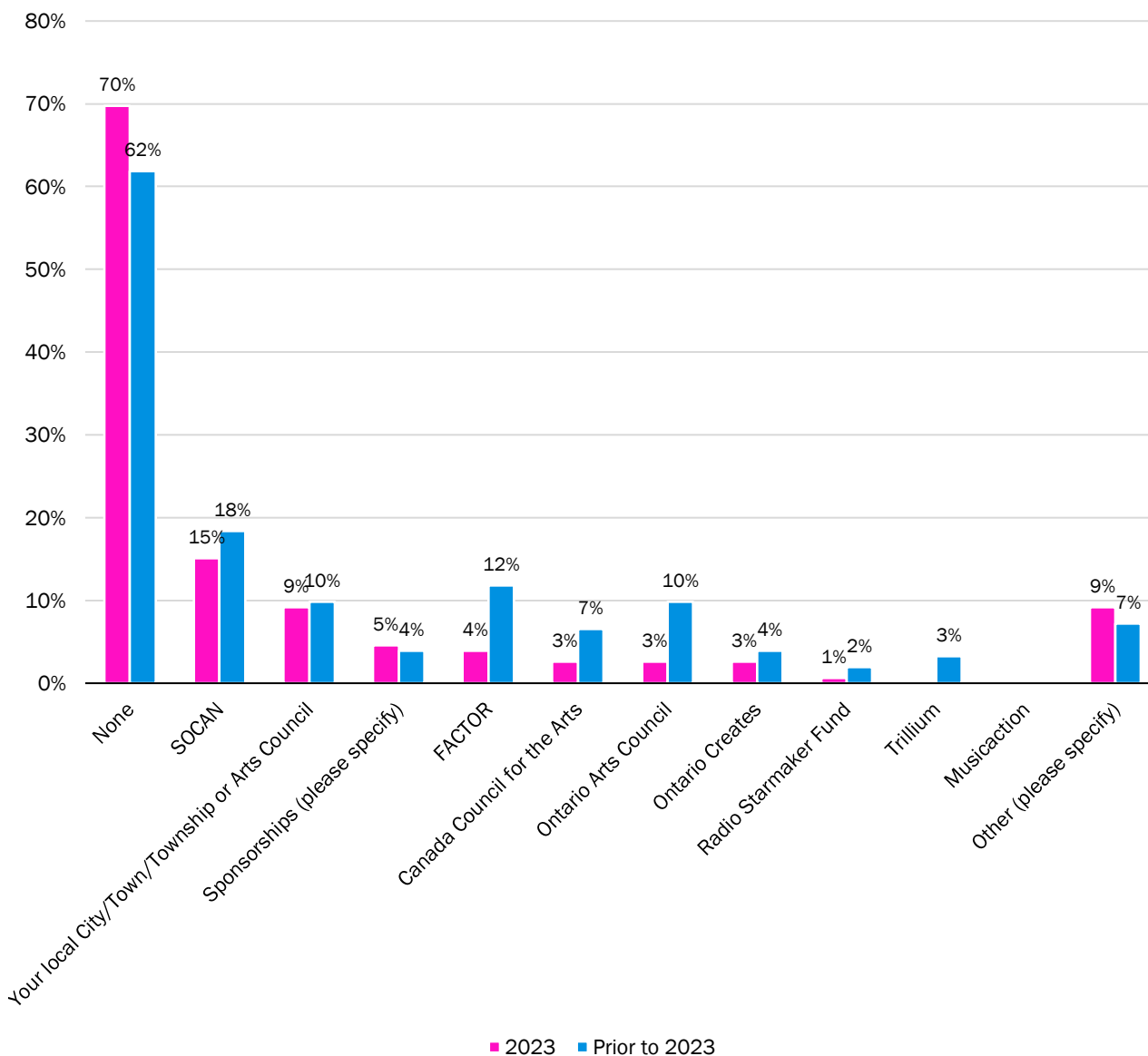


Source: Durham Music Industry Analysis Survey



When asked about grant funding, most businesses and music individuals did not access grants in 2023 or prior to 2023 (however, access to grants did increase slightly in 2023). This finding could suggest that the industry feels self-sufficient enough to not need to tap into funding, funding is too challenging to access or navigate, or potentially that there is low awareness of funding opportunities. The grant funding most typically accessed spans a diverse range of sources, with respondents most frequently noting SOCAN (15%), local government sources (9%), and sponsorships (such as corporate sponsorships) (5%). Grant sources such as local and regional tourism grants, post-secondary education grants/sponsorships (such as Durham College, Ontario Tech, and Trent University Durham) were also noted as ‘other’ sources.

Figure 17: Sources of Grant Revenue (n=152)



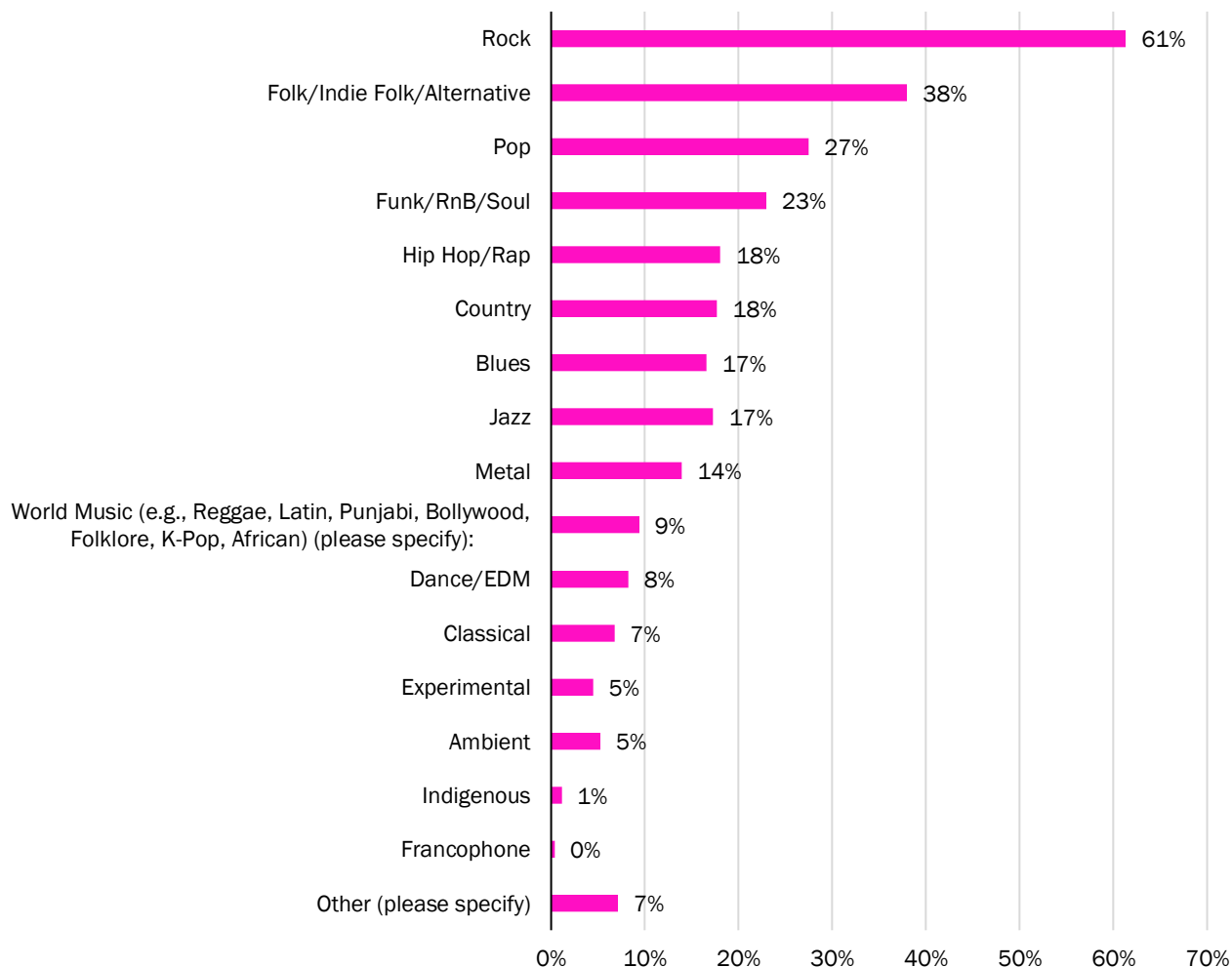
Source: Durham Music Industry Analysis Survey



## Audience Questions

Survey respondents were asked to identify the top three types of music they consume in general. The top three most commonly consumed music genres include rock (61%), folk/indie folk/alternative (36%), and Pop (27%). While these are the top genres, other notable genres in Durham include funk/soul, and hip hop, pointing to the breadth and diversity of music enjoyed in the region. Other 'please specify' examples identified include punk.

Figure 18: Music Genres Most Frequently Consumed (n=266)

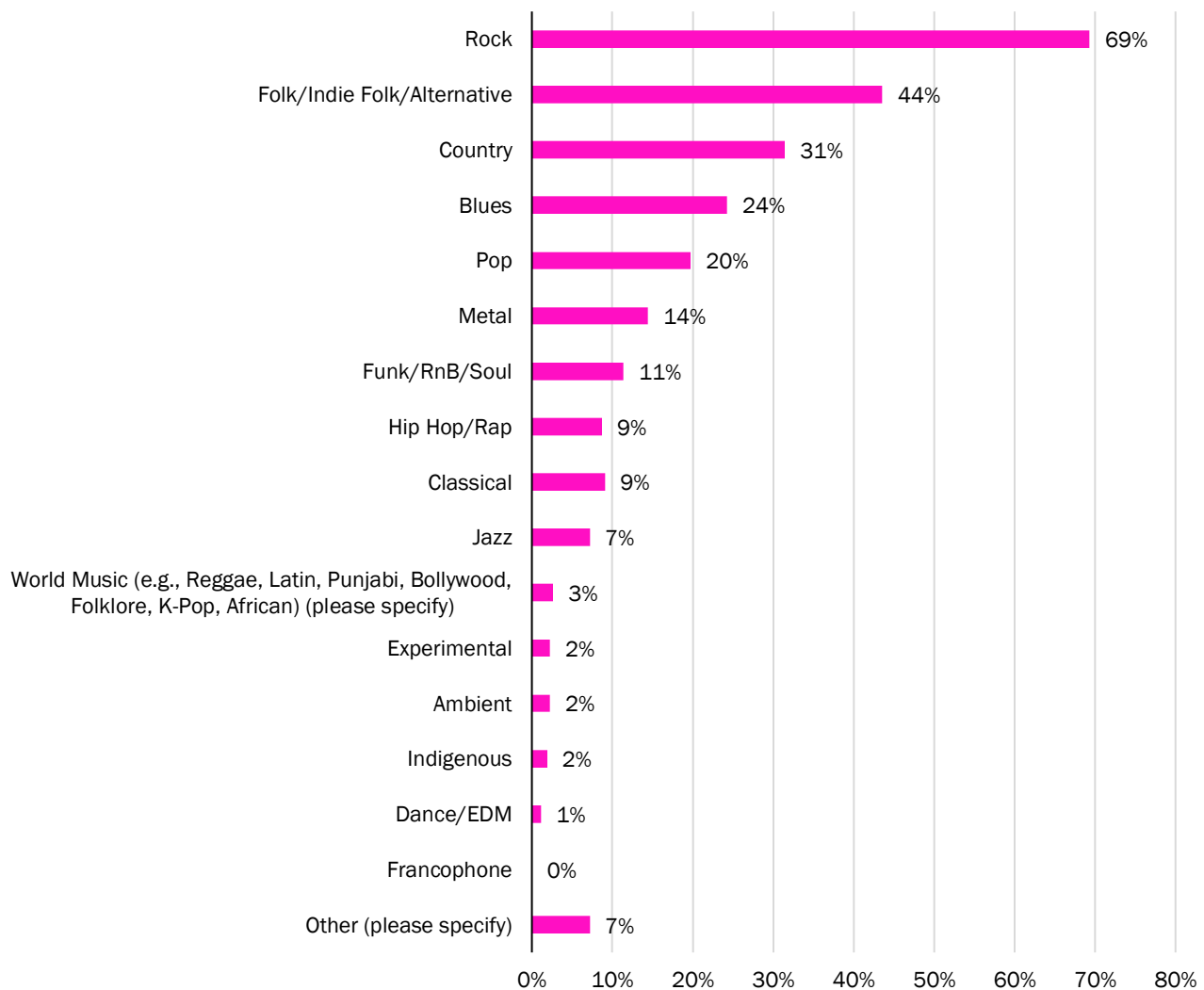


Source: Durham Music Industry Analysis Survey

Respondents were asked to the types of music genres they have experienced live in the Durham region. The top three identified include rock (69%), folk/indie folk/alternative (44%), and country (31%). The wide range of genres identified by participants point to the breadth and diversity of live music occurring and being experienced in Durham. These genres strongly resonate with those most consumed in general as well (identified in the previous figure).



Figure 19: Music Genres Experienced Live in Durham Region (n=264)

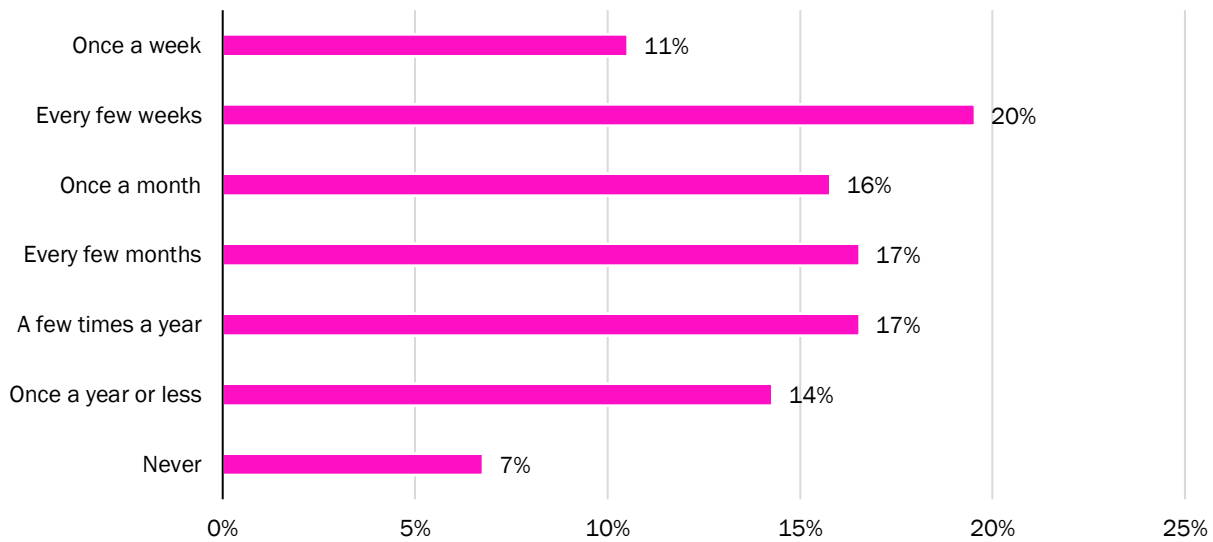


Source: Durham Music Industry Analysis Survey

A fifth of the respondents identify that they attend live music in the Durham region every few weeks (20%). This finding signals a strong appetite for live music events. Moreover, almost half of respondents attend live music in the Durham region a few times a year to once a month. 11% attend live music up to once a week, while 7% never attend live music.



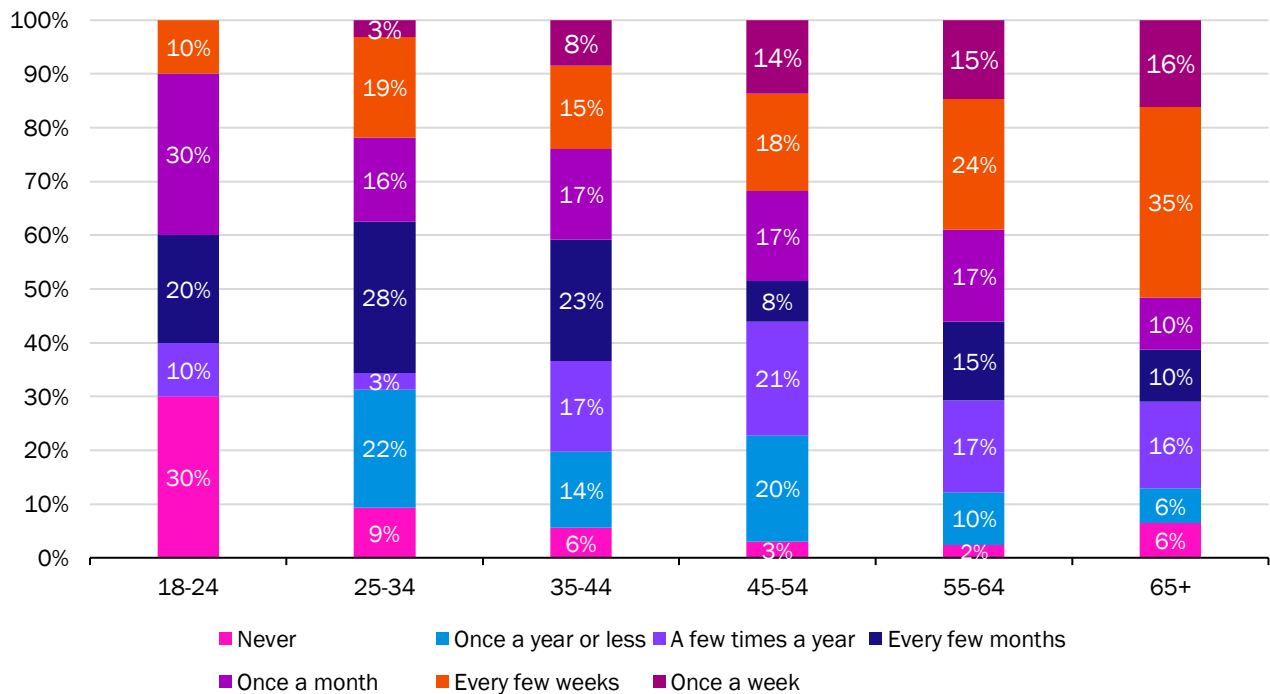
Figure 20: Live Music Frequency in Durham Region (n=266)



Source: Durham Music Industry Analysis Survey

When looking at frequency of attending live music by age, audiences tend to attend more live music events as they age. This finding could suggest that younger audiences may not find events resonating with their interests, and/or are seeking live music experiences elsewhere, outside of Durham.

Figure 21: Live Music Frequency by Age

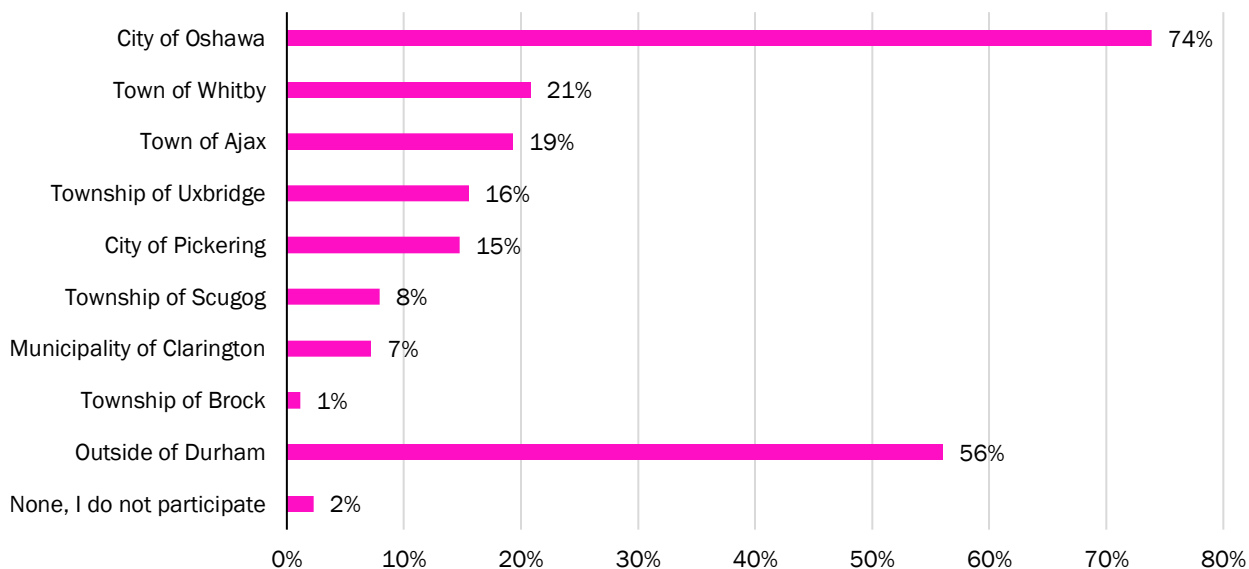


Source: Durham Music Industry Analysis Survey



Within the Durham region, Oshawa was the top location where respondents attend live music (74%). This finding may suggest that there is an opportunity to enhance music offerings in Oshawa to further attract audiences to the area. Other top locations include other major Durham urban centres such as Whitby (21%), Ajax (19%), and Pickering (15%). Outside of Durham was also identified as a major location (56%).

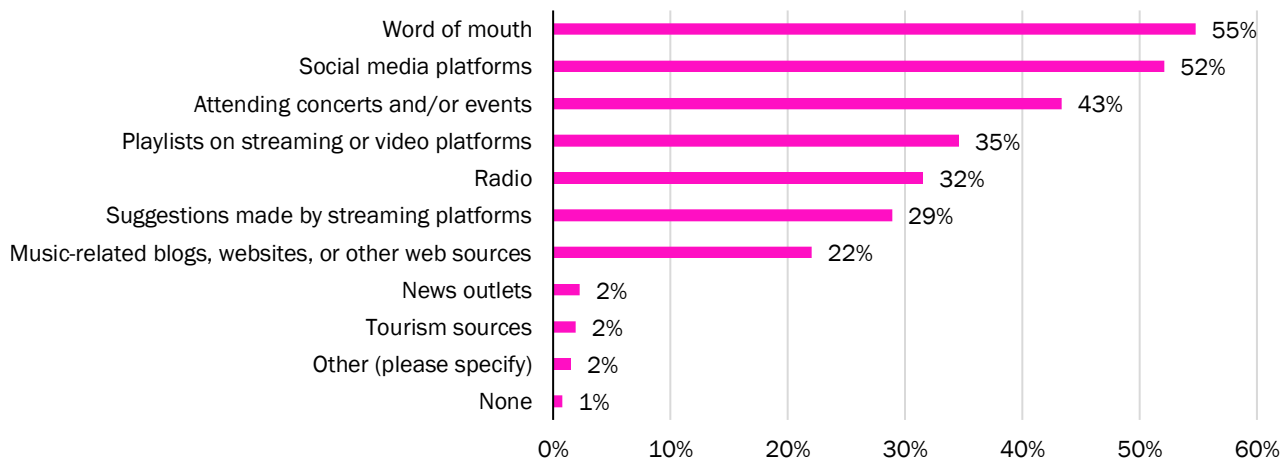
**Figure 22: Locations Frequented to See Live Music (n=264)**



Source: Durham Music Industry Analysis Survey

Over half of respondents discover new music through word of mouth (55%). This is closely followed by social media platforms (52%), attending concerts and/or events (43%) (closely related to word of mouth), and playlists on streaming or video platforms (35%). More traditional methods such as radio, blogs/websites, and media outlets were also cited.

**Figure 23: Discover New Music (n=263)**

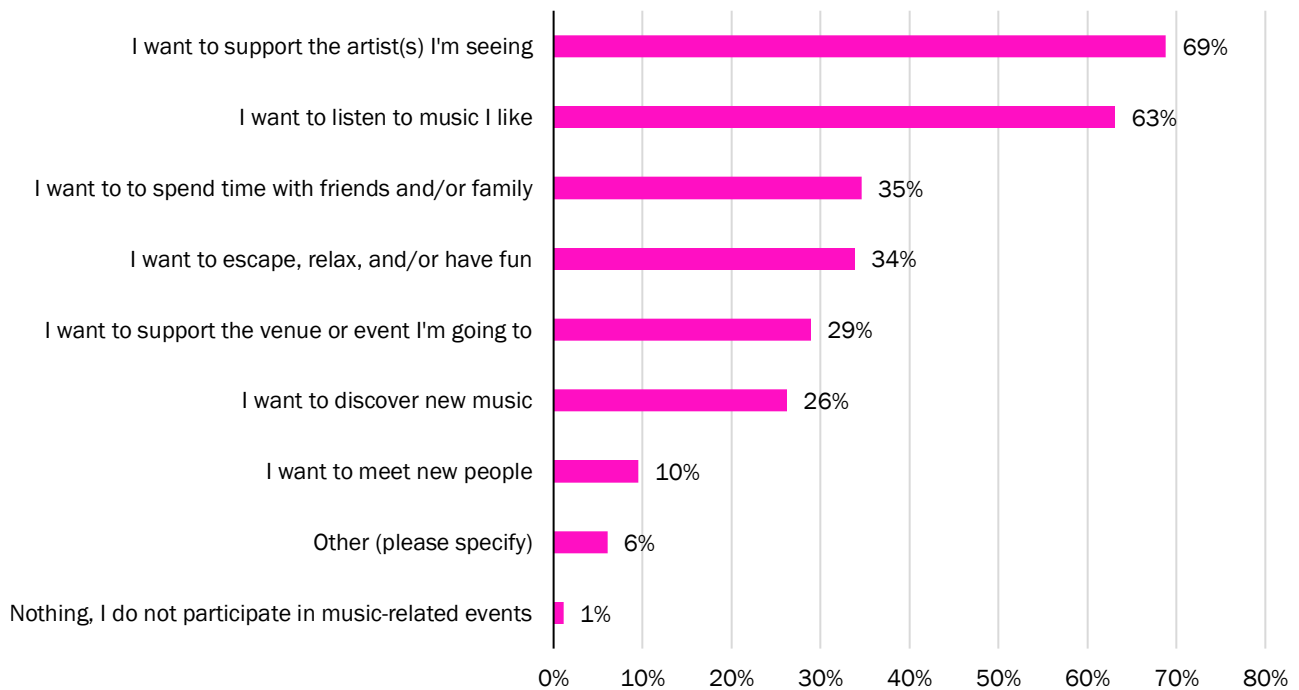


Source: Durham Music Industry Analysis Survey



When asked about motivation to participate in music-related events, supporting artists (69%) and wanting to listen to music they enjoy (63%) were the top two reasons cited by survey respondents. Not so closely followed were desire to spend time with family and friends (35%) and desire to escape, relax, or have fun (34%). This finding suggests that strong values for community, connectivity, and recreation are strong drivers of participation.

**Figure 24: Motivation to Participate in Music-Related Events (n=263)**

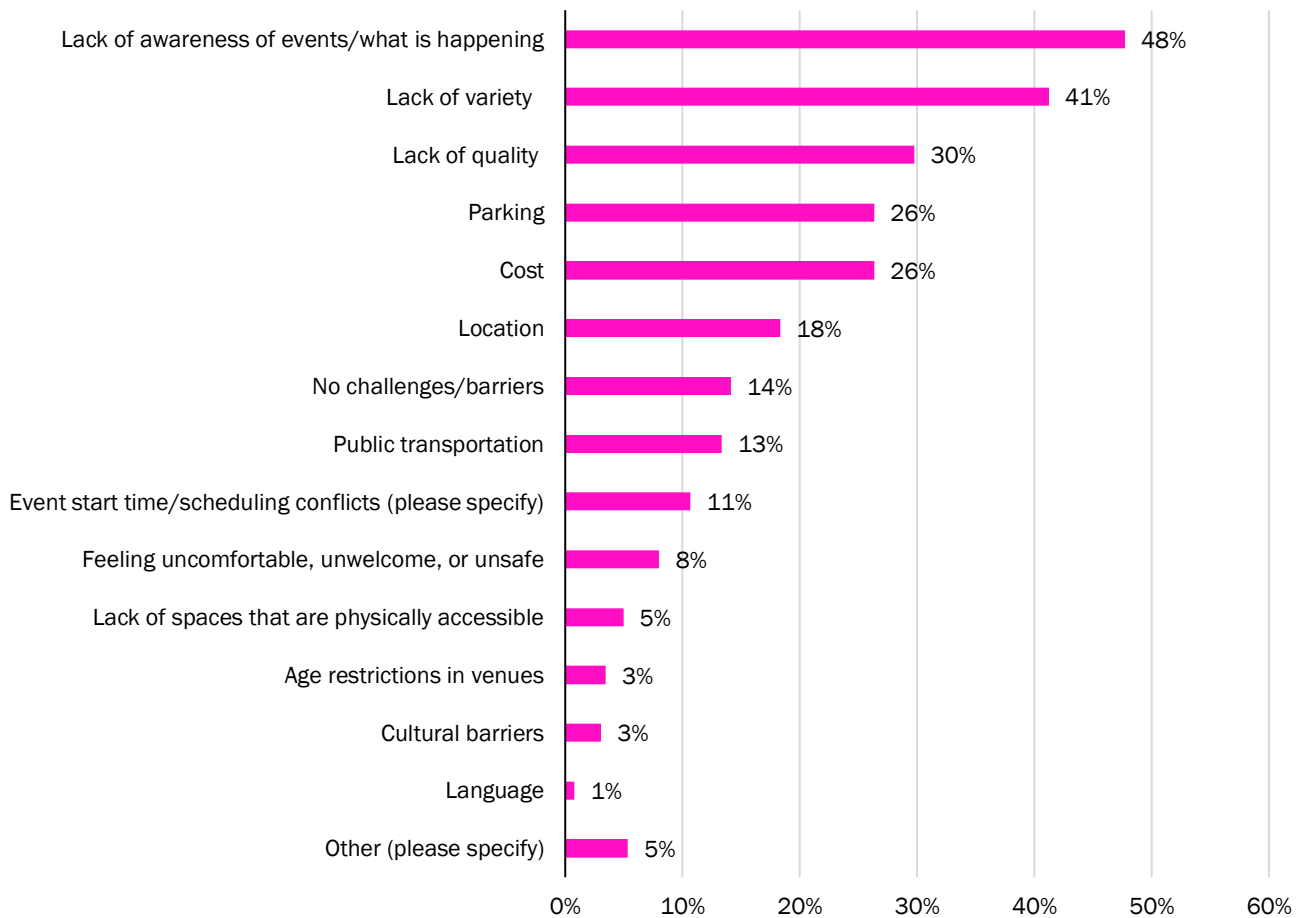


Source: Durham Music Industry Analysis Survey

When asked about the challenges or barriers individuals have experienced while accessing music in Durham, a wide range of issues were identified. The top three identified included lack of awareness (48%), lack of variety (41%), and lack of quality (30%). Together, these barriers may indicate the need for targeted strategies to improve event promotion, diversify musical programming, and enhance the quality of music experiences to foster a more vibrant and accessible music ecosystem in the region.



Figure 25: Challenges or Barriers to Accessing Music in Durham (n=262)



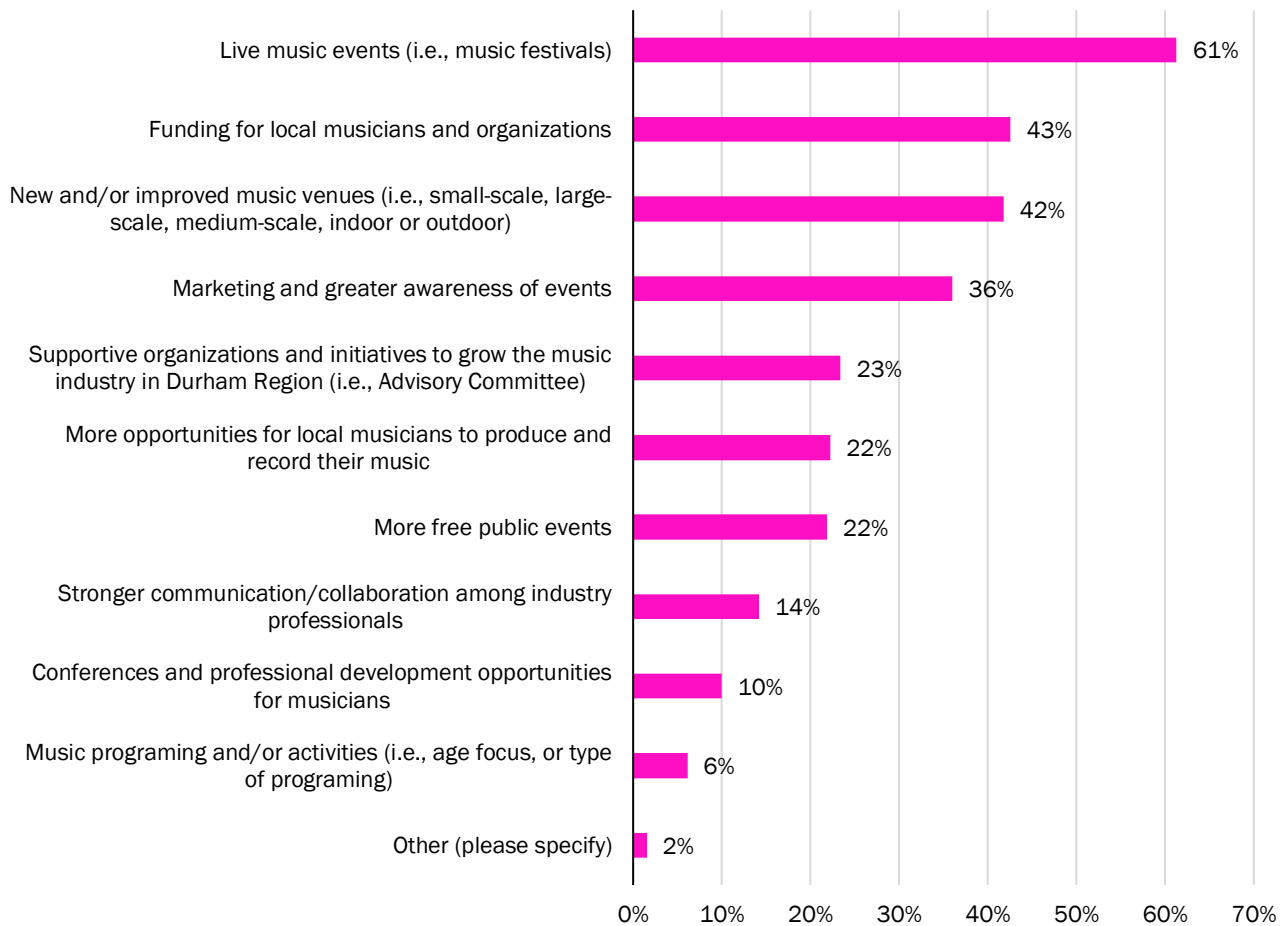
Source: Durham Music Industry Analysis Survey

When examining challenges and barriers across different age groups, individuals aged 55-64 reported few to no obstacles, whereas other groups—youth, adults, and older seniors—cited specific challenges, including limited transportation access among youth, busy schedules for adults, and poor accessibility for seniors. Moreover, when examining challenges and barriers by where respondents reside (i.e., location), the top three cited issues were a lack of awareness of events, venue locations, and the quality of available venues. The lack of awareness was reported slightly more in smaller areas, such as the Township of Brock, compared to larger urban centers like the City of Oshawa, which may suggest more limited resources or outreach efforts in these areas.

Respondents were asked to select the top three music-related opportunities they would like to see/see more of in Durham. Local resources such as live music events (61%), funding for local musicians and organizations (43%), and new and improved venues (42%), were selected most frequently.



**Figure 26: Music-Related Opportunities in Durham (n=261)**



Source: Durham Music Industry Analysis Survey

When looking at music-related opportunities in Durham cross tabbed by respondent role type, funding seems to be a more pronounced priority among those in the industry (such as music professionals or businesses) than those outside of the industry (a member of the public).

The following table identifies the types of categories people spend on music on average per month. Physical includes CDs, records, tapes, etc. In total, survey respondents spend approximately \$96 a month.

**Table 6: Spend on Music (n=264)**

Category	Average Spend per month
Merchandise	\$46
Music Streaming	\$23
Physical	\$27
<b>Total</b>	<b>\$96</b>

This document was prepared by:

**Nordicity**

[www.nordicity.com](http://www.nordicity.com)

Carly Frey, Partner

Zoe Brown, Senior Consultant

Caitlin Cross, Consultant

Lianne McRadu, Senior Analyst

Brian Christensen, Senior Analyst