



The Regional Municipality of Durham

Community Growth and Economic Development Committee Revised Agenda

Tuesday, May 6, 2025, 9:30 a.m.

Regional Council Chambers

Regional Headquarters Building

605 Rossland Road East, Whitby

If this information is required in an accessible format, please contact 1-800-372-1102 ext. 2097.

Note: This meeting will be held in a hybrid meeting format with electronic and in-person participation. Committee meetings may be [viewed via live streaming](#).

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| 10. Confidential Matters | |
| There are no confidential matters to be considered | |
| 11. Other Business | |
| 12. Date of Next Meeting | |
| Tuesday, June 3, 2025 at 9:30 AM | |
| 13. Adjournment | |
| Notice regarding collection, use and disclosure of personal information: | |
| Written information (either paper or electronic) that you send to Durham Regional Council or Committees, including home address, phone numbers and email addresses, will become part of the public record. This also includes oral submissions at meetings. If you have any questions about the collection of information, please contact the Regional Clerk/Director of Legislative Services. | |

The Regional Municipality of Durham

MINUTES

COMMUNITY GROWTH & ECONOMIC DEVELOPMENT COMMITTEE

Tuesday, March 4, 2025

A regular meeting of the Community Growth & Economic Development Committee was held on Tuesday, March 4, 2025 in the Council Chambers, Regional Headquarters Building, 605 Rossland Road East, Whitby, Ontario at 9:30 AM. Electronic participation was offered for this meeting.

1. Roll Call

Present: Councillor Chapman, Chair
Councillor Pickles, Vice-Chair
Councillor Collier* attended the meeting at 9:37 AM and left the meeting at 9:58 AM
Councillor Kerr
Councillor Shahid
Councillor Woo
Councillor Wotten
Regional Chair Henry

*** denotes Councillors participating electronically**

Also

Present: Councillor Mulcahy*
*** denotes visiting Councillors participating electronically**

Staff

Present: E. Baxter-Trahair, Chief Administrative Officer
B. Bridgeman, Commissioner of Community Growth & Economic Development
V. Brijpaul, Planner, Transit-Oriented Development (TOD)
M. Broderick, Manager, Business Development & Investment, Economic Development
I. Cheung, Business Development Specialist, Economic Development
S. Ciani, Committee Clerk, Corporate Services – Legislative Services
J. Feuiltault, Business Development Specialist, Economic Development
T. Fraser, Committee Clerk, Corporate Services – Legislative Services
N. Gibson, Business Development Specialist, Economic Development
S. Gill*, Director, Economic Development & Tourism
C. Goodchild, Director of Community Growth
B. Holmes, General Manager, Transit
R. Inacio, Systems Support Specialist, Corporate Services – IT
J. Kelly, Manager, Integrated Growth Management & Policy
C. Leitch, Manager, Transportation Planning

L. Lovery, Director, Rapid Transit & Transit-Oriented Development (TOD)
A. Luqman, Acting Manager, Transit-Oriented Development (TOD)
J. Rhynas, Business Development Specialist, Economic Development
J. Severs, Manager, Marketing & Tourism, Economic Development
T. Shaver, Manager, Small Business Enterprise Centre, Economic
Development & Tourism
L. Talling, Acting Manager, Agriculture & Rural Affairs, Economic
Development
L. Trombino, Manager, Development Advisory Services
V. Walker, Committee Clerk, Corporate Services – Legislative Services
R. Woon, Senior Solicitor, Chief Administrative Office – Legal Services
*** denotes Staff participating electronically**

2. **Declarations of Pecuniary Interest**

There were no declarations of pecuniary interest made.

3. **Adoption of Minutes**

Moved by Councillor Kerr, Seconded by Councillor Wotten,
(18) That the minutes of the regular Community Growth & Economic
Development Committee meeting held on Tuesday, February 4, 2025, be
adopted.

CARRIED

4. **Statutory Public Meetings**

There were no statutory public meetings.

5. **Presentations**

5.1 Lori Talling, Acting Manager, Agriculture and Rural Economic Development re: Growing North Durham Plan Annual Activity Report (2025-EDT-6) [Item 8.2 a.]

Lori Talling, Acting Manager, Agriculture and Rural Economic Development,
provided a PowerPoint presentation with regards to the Growing North Durham
Plan Annual Activity Report.

Highlights of the presentation included:

- Background
- Three Pillars
 - People
 - Places
 - Prosperity
- Looking Ahead

L. Talling responded to questions from the Committee with regards to whether the Growing North Durham Plan includes any of the northern portions of the lakeshore municipalities or is exclusive to the northern area municipalities; and whether consideration has been given to the housing supply and cost of housing in north Durham in comparison to the lakeshore municipalities, and the desirability to live, work and play in north Durham.

5.2 Simon Gill, Director of Economic Development and Tourism, and Maylene Broderick, Manager, Business Development and Investment, re: Investment Attraction Metrics – Annual Activity Report 2024 (2025-EDT-7) [Item 8.2 b.]

Simon Gill, Director of Economic Development and Tourism, and Maylene Broderick, Manager, Business Development and Investment, provided a PowerPoint presentation with regards to Investment Attraction Metrics – Annual Activity Report 2024.

Highlights of the presentation included:

- What We Do
- Collaboration with Durham Economic Development Partnership (DEDP)
- Our Focus
 - Future Energy
 - Next Gen Mobility
 - Arts, Culture and Creative
 - Applied Digital Tech
 - Agri-Food
- Investment Leads
- Lead Sources
- Investment Attraction Missions
- Spotlight: Tampere, Finland Economic Development Partnership
- Supporting Events
- Inbound Delegations
- Spotlight: Investment Ontario
- Metrics Summary
- Investment Successes

M. Broderick responded to questions from the Committee with regards to the sources of new investment leads that do not fall within the five priority areas outlined in “Ready, Set, Future”; what diversified trade options are available for the Region and being considered by Invest Durham; and how the Region can promote its interest in welcoming new international business contracts to Durham.

B. Bridgeman responded to a question from the Committee with regards to whether a phase-in approach to development charges would have a positive impact on attracting new business investment to the Region.

6. Delegations

There were no delegations heard.

7. Community Growth

7.1 Correspondence

There were no communication items to be considered.

7.2 Reports

A) Smart Mobility Durham 2024 Annual Report and 2025 Workplan (2025-CG-4)

Report #2025-CG-4 from B. Bridgeman, Commissioner of Community Growth and Economic Development, was received.

Moved by Councillor Wotten, Seconded by Councillor Pickles,
(19) That we recommend to Council:

- A) That Report #2025-CG-4 of the Commissioner of Community Growth and Economic Development, including the Smart Mobility Durham's 2024 Annual Report as outlined in Attachment 1, be received;
- B) That Smart Mobility Durham's 2025 Workplan be approved, as outlined in Attachment 2 to Report #2025-CG-4; and
- C) That a copy of Report #2025-CG-4 be forwarded to the Durham Active Transportation Committee and the Area Municipalities.

CARRIED

B) Durham Environment and Climate Advisory Committee (DECAC) Youth Membership Appointment (2025-CG-5)

Report #2025-CG-5 from B. Bridgeman, Commissioner of Community Growth and Economic Development, was received.

Moved by Councillor Wotten, Seconded by Councillor Pickles,
(20) That we recommend to Council:

- A) That Chazz DeAbreu be appointed to the Durham Environment and Climate Advisory Committee as its Youth Member and that they be so advised; and
- B) That a copy of Report #2025-CG-5 of the Commissioner of Community Growth and Economic Development be forwarded to the Durham Environment and Climate Advisory Committee and Pickering High School.

CARRIED

8. Economic Development

8.1 Correspondence

There were no communication items to be considered.

8.2 Reports

A) Growing North Durham Plan Annual Activity Report (2025-EDT-6)

Report #2025-EDT-6 from B. Bridgeman, Commissioner of Community Growth and Economic Development, was received.

B. Holmes responded to a question from the Committee with regards to how workforce transportation challenges are being addressed, especially for the northern area municipalities.

B. Bridgeman responded to a question from the Committee with regards to pre-servicing employment lands.

Moved by Councillor Pickles, Seconded by Councillor Woo,
(21) That Report #2025-EDT-6 of the Commissioner of Community Growth and Economic Development be received for information.

CARRIED

B) Investment Attraction Metrics – Annual Activity Report 2024 (2025-EDT-7)

Report #2025-EDT-7 from B. Bridgeman, Commissioner of Community Growth and Economic Development, was received.

Moved by Councillor Pickles, Seconded by Councillor Woo,
(22) That Report #2025-EDT-7 of the Commissioner of Community Growth and Economic Development be received for information.

CARRIED

9. Advisory Committee Resolutions

There were no advisory committee resolutions to be considered.

10. Confidential Matters

There were no confidential matters to be considered.

11. Other Business

11.1 Durham Region's Planned Activities and Response to United States (U.S.) Tariffs

Following questions from the Committee with regards to how the Region plans to address impacts on Regional services and operations as a result of the tariffs imposed by the U.S., and whether the Region intends to issue a statement to its residents, B. Bridgeman advised that the Durham Economic Task Force is working on several priorities to support the business community affected by the tariffs. He further stated that a resource page has been launched at www.investdurham.ca/tariffs to provide updated information and relevant links and resources about available programs from different federal ministries.

S. Gill stated that some of the planned activities of the Task Force include the following:

- Engaging with the business community, gathering information from businesses on the impacts they are expected to face, and providing advice for actions that can be undertaken by businesses immediately in response to the tariffs;
- Delivering information to businesses and actively promoting the resource page to businesses in the Region;
- Developing a trade diversification program;
- Developing a shop local tourism campaign, which is expected to launch this summer; and
- Hosting an informational webinar in collaboration with the Chambers and Boards of Trade. The webinar will include a segment on the Canada-European Trade Agreement (CETA), and representatives from Export Development Canada (EDC) and the Foreign Trade Commissioner Service will also contribute content for the webinar.

S. Gill responded to further questions from the Committee with regards to who will be able to attend the webinar; the number of memorandums of understanding (MOUs) the Region has entered into internationally; and how many sister cities there are to the Region.

11.2 Durham Agricultural Advisory Committee (DAAC) 2025 Farm Tour

Chair Chapman announced that the Durham Agricultural Advisory Committee is organizing its annual farm tour which will take place on September 4, 2025, at the Kubota Headquarters in the City of Pickering. He advised that further details will be shared with the Committee as they become available.

12. **Date of Next Meeting**

The next regularly scheduled Community Growth & Economic Development Committee meeting will be held on Tuesday, May 6, 2025 at 9:30 AM in the Council Chambers, Regional Headquarters Building, 605 Rossland Road East, Whitby.

13. Adjournment

Moved by Councillor Kerr, Seconded by Regional Chair Henry,
(23) That the meeting be adjourned.

CARRIED

The meeting adjourned at 10:19 AM

Respectfully submitted,

B. Chapman, Chair

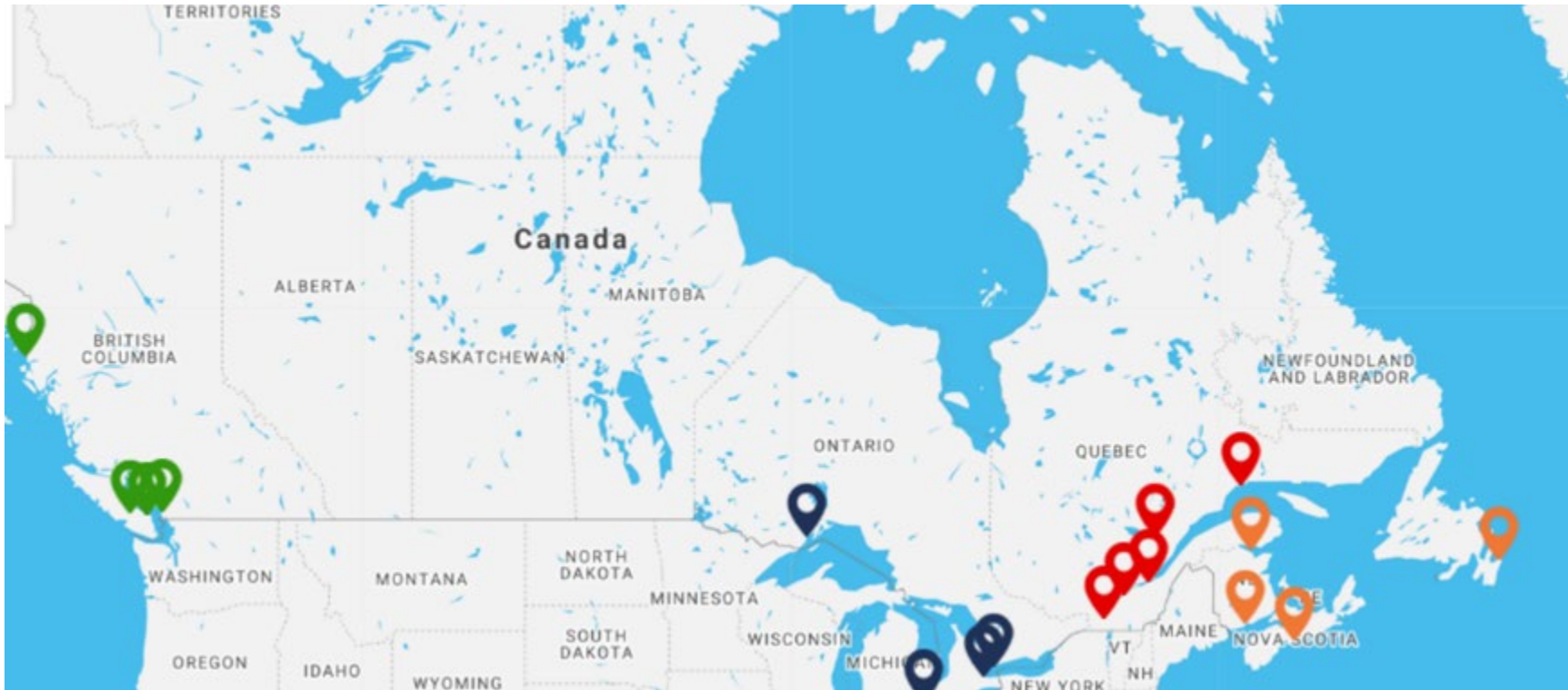
V. Walker, Committee Clerk

DURHAM REGION UPDATE 2025



WHO WE ARE

Hamilton-Oshawa Port Authority is one of 17 port authorities in Canada



HOPA's mandate is to facilitate trade and support Canadian industry by providing industrial space and efficient transportation connections.

CANADA PORT AUTHORITY

- Non-share capital corporation
- Government-business enterprise
- Self-funded
- Reinvesting in our assets
- Activities determined by the Canada Marine Act and Letters Patent



Create and lead
a sustainable integrated port network
on the Great Lakes
to drive supply chain resilience



MANAGING WORKING WATERFRONTS ON THE CANADIAN GREAT LAKES



- Hamilton + Oshawa + Niagara
- 1,400 acres
- 10+ million MT cargo
- 700 vessel calls per year
- 180 tenant companies
- 70 staff

WHO WE ARE

A GROWING, INTEGRATED PORT NETWORK



CARGO HIGHLIGHTS

PORT OF HAMILTON

600 vessels

10 million MT

Value of cargo: \$3.75 B

PORT OF OSHAWA

77 vessel calls

600,000 MT

Value of cargo: \$282 M

THOROLD HUB

10 vessels

140,000 MT



LEGEND

- HOPA LANDS
- QSL OPERATING AREA
- JOINT OPERATING AREA
- FUTURE STATE DEVELOPMENT IN CONSULTATION WITH QSL
- ADMINISTRATION LANDS (OFFICES AND SECURITY)
- GREEN SPACE
- PROPOSED ROAD/RAIL /UTILITY CORRIDOR
- EXISTING RAIL SIDINGS
- PROPOSED COMBINED USE RAIL CORRIDOR

THIS DRAWING IS FOR ILLUSTRATION PURPOSES ONLY. ALL AREAS AND DIMENSIONS ARE SUBJECT TO CHANGE BASED ON LEGAL SURVEY.



805 JAMES STREET NORTH - HAMILTON, ON L8L 1K1
PH: 905.525.4130 F: 905.525.1238

PROJECT: PORT OF OSHAWA PROPOSED QSL LANDS

PROJECT: PROPOSED LAND USES

DATE: NOVEMBER 2021

SCALE: 1:2,500

DRAWN BY: JW / AI

CHECKED BY: JS / MS



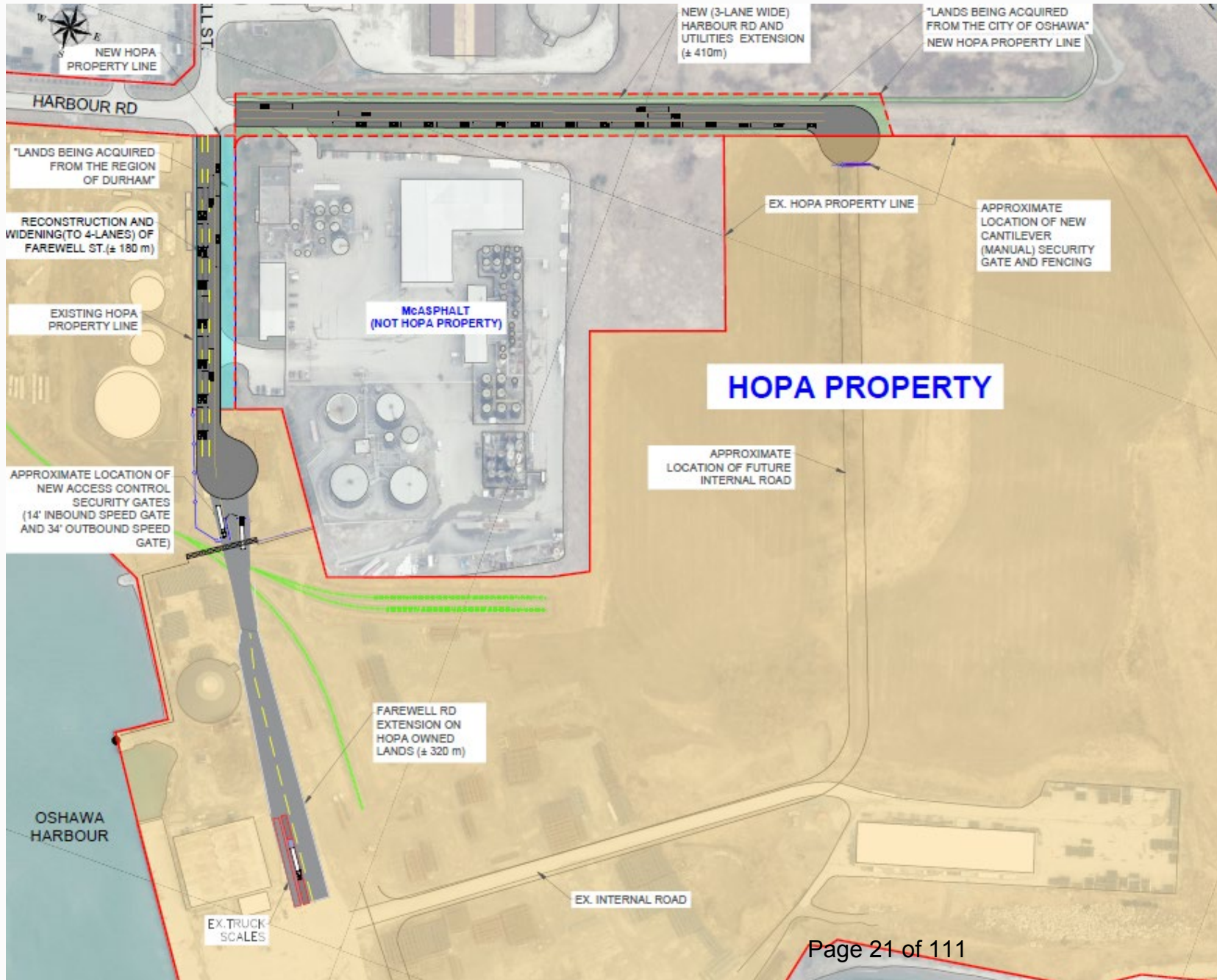
OSHAWA GRAIN SILOS





DREDGING OSHAWA HARBOUR





FAREWELL & HARBOUR ROADS



Economic Development Partnership

HANNOVER MESSE

HOPA participated alongside Durham Region, Hamilton and Niagara to establish more East-West supply chains for Canada



Key Sectors



- **Agri-Food**



- **Construction Materials**



- **Manufacturing**



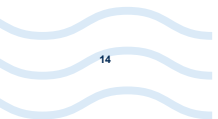
- **Energy**



- **Film**



- **Transportation/Logistics**



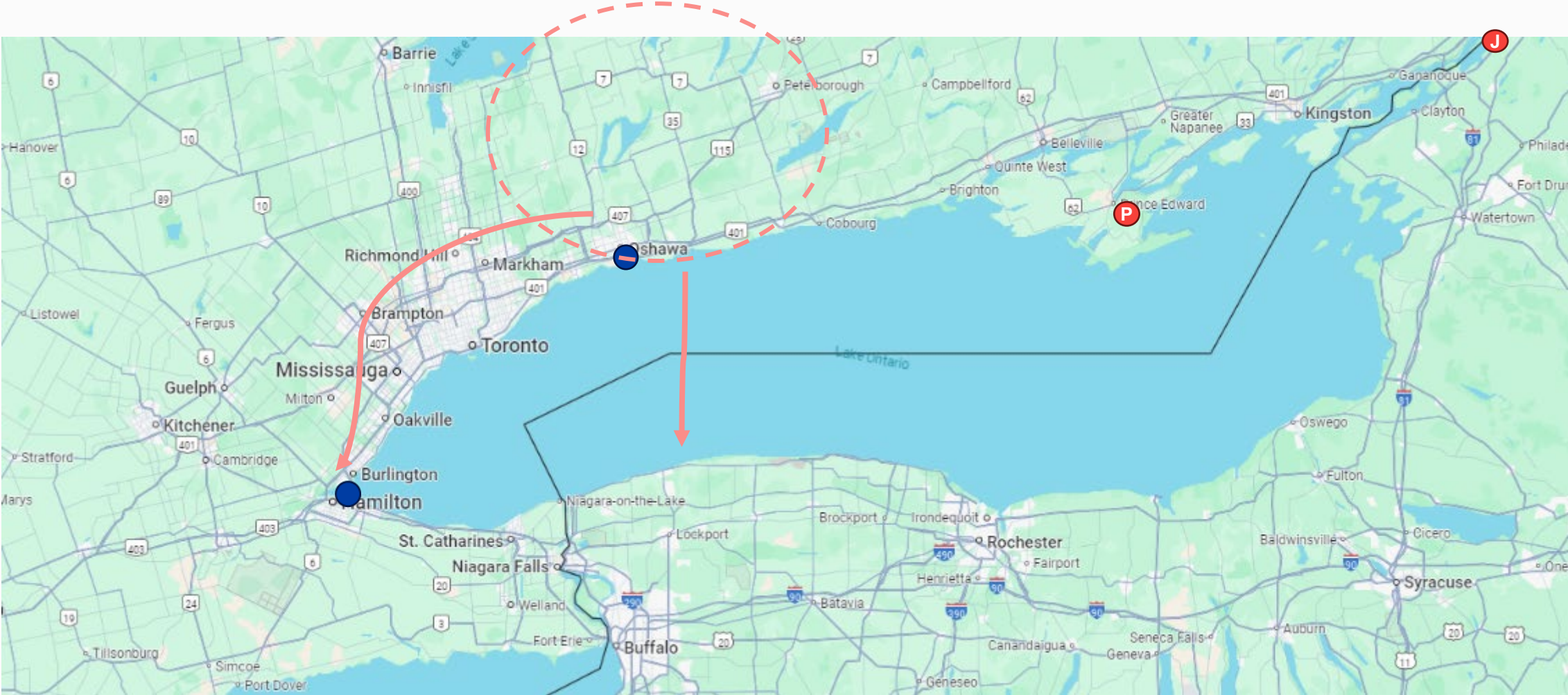
INTEGRATED NETWORK

Southern Ontario is heading for a population of over 15 million in the next 20 years.

HOPA takes a regional perspective on goods movement.



MOVING GOODS IN S. ONTARIO

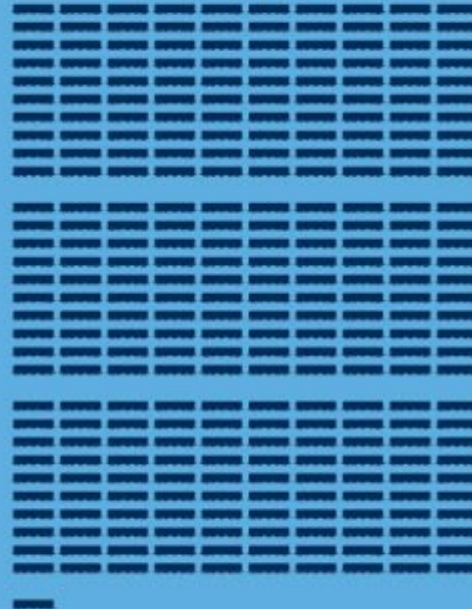


One Great Lakes vessel carries as much cargo as 301 railcars or 963 heavy trucks

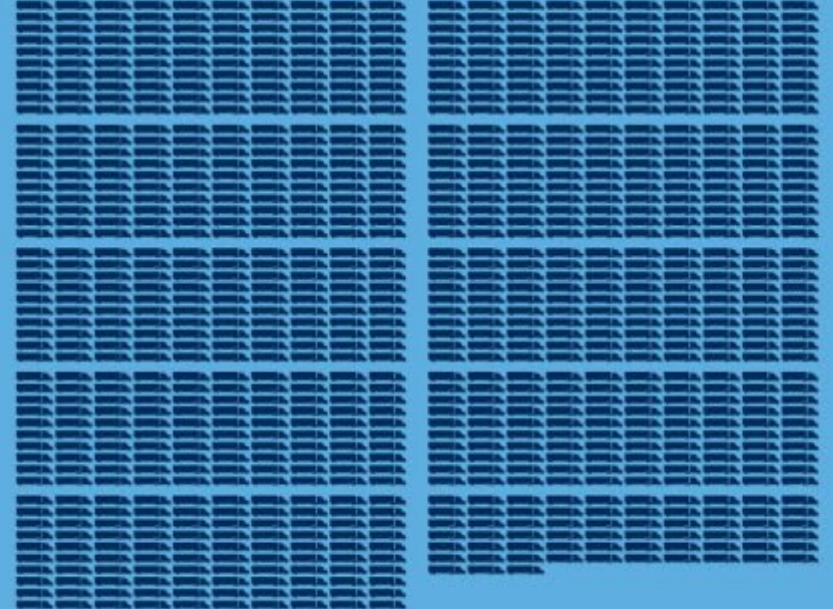
1 Ship



301 Railcars



963 Trucks





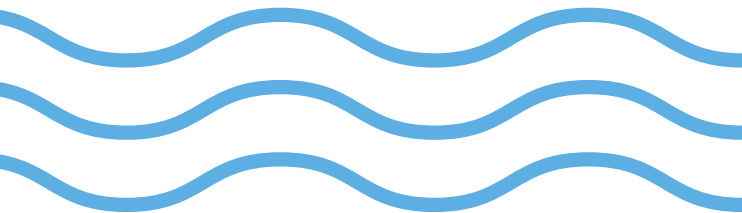
INNOVATION

USING DATA TO OPTIMIZE MODAL CHOICE

- Data analysis partnership with McMaster University
- 2.5 million heavy truck trips per year
GTHA-US Midwest
- Identifying key commodities as targets for new marine services

Friends of Second Marsh

Phragmites Removal



In the community

Doors Open



Lifejacket Loaner Program



Community Sponsorships





LOOKING AHEAD

- **Climate change & adverse weather impacts – sedimentation**
- **Container movements within the Great Lakes**

Annual General Meeting & Report to the Community

Everyone is welcome to attend either event, or join us for both. Free parking will be available on site at each location.

[Register](#)



HAMILTON

Hamilton Annual General Meeting

The Hamilton-Oshawa Port Authority Annual General Meeting will be held Wednesday, May 14, 2025 at the Royal Hamilton Yacht Club.

For more information and to register, please visit the link below:

[Hamilton Registration](#)

OSHAWA

Port of Oshawa - Report to the Community

The Port of Oshawa Report to the Community will be held Tuesday, June 3rd at the Jubilee Pavilion – 55 Lakeview Park Avenue, Oshawa, ON.

For more information and to register, please visit the link below:

[Oshawa Registration](#)

THANK YOU

STAY IN TOUCH



@HOPAports



@HamiltonOshawaPortAuthority



@hopaports



Hamilton Oshawa Port Authority

community@hopaports.ca



The Regional Municipality of Durham Report

To: Community Growth and Economic Development Committee
From: Commissioner of Community Growth and Economic Development
Report: #2025-CG-6
Date: May 6, 2025

Subject:

Durham Active Transportation Committee (DATC) Township of Scugog Membership Appointment for 2025-2026, File: A01-40

Recommendation:

That the Community Growth and Economic Development Committee recommends to Regional Council:

- A) That Jay Jutzi be appointed to the Durham Active Transportation Committee as its Township of Scugog representative;
 - B) That Mr. Jutzi be advised of their appointment to the DATC; and
 - C) That a copy of Commissioner's Report #2025-CG-6 be forwarded to the Township of Scugog and the Durham Active Transportation Committee.
-

Report:

1. Purpose

- 1.1 The purpose of this report is to appoint a Township of Scugog citizen advisory volunteer on the Durham Active Transportation Committee (DATC) for the 2025-2026 term to fill the current vacancy.

2. Background

- 2.1 In January of 2025, the Township of Scugog's citizen advisory volunteer member, Marc Gibbons, resigned from the DATC.

- 2.2 In accordance with the DATC Terms of Reference, advertisements were posted online to the Region's social media platforms throughout the month of February of 2025 seeking expressions of interest from individuals residing in the Township of Scugog that are interested in serving on the DATC. One application was received from a resident of the Township of Scugog, Jay Jutzi, during the notice period.
- 2.3 The Township of Scugog was notified of the vacancy and the application of the qualified candidate received through the notice period.
- 2.4 At its meeting on March 24, 2025, the Township of Scugog nominated Mr. Jutzi for appointment to the DATC (Attachment #1). Accordingly, it is recommended that the appointment of Mr. Jutzi as the Area Municipal Citizen Volunteer for Scugog, be confirmed.
- 2.5 Mr. Jutzi is a resident of Scugog and is a long-time educator and active resident passionate about advocating for safe and accessible active transportation options. As a member of the Durham Mountain Bike Association and an avid walker and cyclist, he brings valuable firsthand experience in active transportation and its role in fostering healthy, engaged communities.

3. Previous Reports and Decisions

- 3.1 On March 7, 2023, Council endorsed the appointments of the current Durham Active Transportation members for the 2023-2026 term through Commissioner's Report [#2023-P-5](#)
- 3.2 On January 7, 2025, Council endorsed DATC's 2024 Annual Report and 2025 Workplan through Commissioner's Report [#2025-CG-3](#).

4. Relationship to Strategic Plan

- 4.1 This report aligns with/addresses the following Strategic Direction(s) and Pathway(s) in Durham Region's 2025-2035 Strategic Plan:
 - a. Connected and Vibrant Communities
 - C4. Improve road safety, including the expansion and connection of active transportation networks to enhance the range of safe mobility options.

b. Strong Relationships

- S1. Enhance inclusive opportunities for community engagement and meaningful collaboration.
- S5. Ensure accountable and transparent decision-making to serve community needs, while responsibly managing available resources.

4.2 This report aligns with/addresses the following Foundation(s) in Durham Region's 2025-2035 Strategic Plan:

- a. Processes: Continuously improving processes to ensure we are responsive to community needs.

5. Attachments

Attachment #1: Correspondence from the Township of Scugog dated April 1, 2025

Respectfully submitted,

Original signed by

Brian Bridgeman, MCIP, RPP, PLE
Commissioner of Community Growth and
Economic Development

Recommended for Presentation to Committee

Original signed by

Elaine C. Baxter-Trahair
Chief Administrative Officer



181 Perry Street, PO Box 780
Port Perry, ON L9L 1A7
Phone: 905-985-7346
Fax: 905-985-9917
scugog.ca

Sent Via Email to: clerks@durham.ca

April 1, 2025

Alexander Harras, Regional Clerk
Region of Durham Headquarters
605 Rossland Road East
Whitby, ON L1N 6A3

RE: Scugog Representative to the Durham Active Transportation Committee (DATC)

Regional Clerk Harras:

Please be advised that at the last regular meeting of the Council of the Township of Scugog held on March 24, 2025, Council appointed Jay Jutzi as the Scugog representative to the Durham Active Transportation Committee (DATC).

Should you have any questions, please feel free to contact Blair Labelle, Clerk or 905-985-7346 ext. 119.

Yours Truly,

A handwritten signature in black ink, appearing to read "Blair Labelle", is positioned below the text "Yours Truly,".

Blair Labelle
Director of Corporate Services/Clerk

To access this document in an accessible format, please contact 905-985-7346 ext. 115



The Regional Municipality of Durham Report

To: Community Growth and Economic Development Committee
From: Commissioner of Community Growth and Economic Development
Report: #2025-EDT-8
Date: May 6, 2025

Subject:

Hamilton Oshawa Port Authority General Update

Recommendation:

That the Community Growth and Economic Development Committee recommends:

That this report be received for information.

Report:

1. Purpose

1.1 The purpose of this report is to provide the Community Growth and Economic Development Committee a brief update on the recent and planned activities and achievements of the Hamilton Oshawa Port Authority (HOPA), and to notify Committee that a delegation from HOPA will be appearing at Committee to provide a presentation.

2. Background

2.1 The Hamilton-Oshawa Port Authority (HOPA) is the entity responsible for the governance of the Ports of Hamilton and Oshawa. HOPA is the successor corporation to the Hamilton Port Authority and the Oshawa Port Authority, when port governance was merged on June 19, 2019.

2.2 The Port of Oshawa is one of Durham Region's gateways to the world. On average, the port handles \$23 million of cargo annually, from salt and steel products to asphalt and grain. The movement of cargo through the Port of Oshawa supports 294 jobs throughout the local economy and generates \$6 million in federal and

provincial taxes annually.

3. Previous Reports and Decisions

- 3.1 HOPA has not previously provided an update to Durham Regional Committees or Council.

4. Oshawa Port Projects

4.1 Grain Terminal Expansion

- a. There is a \$35+ million expansion and modernization project underway. The newly expanded terminal now offers a total of 20,000 MT (metric tonnes) of storage capacity and features a vessel loading rate of up to 12,000 MT per day, ensuring fast and efficient grain loading.
- b. This new export capacity directly benefits agri-food producers in Durham and east GTA regions, through a more efficient terminal and through reducing the need for longer-distance trucking of agricultural products.

4.2 Proposed Road Reconstruction

- a. HOPA is proposing to improve vehicle access to the East Wharf at the Port of Oshawa. HOPA and the Region of Durham have been collaborating closely on this project, after HOPA purchased the southernmost section of Farewell St. in 2024 from the Region, which will be incorporated inside the port gates as part of this project
- b. The project proposes to widen and extend Farwell Street as well as extending Harbour Road.
- c. As of March 27, 2025, the public comment period on the project is closed.

4.3 Partnership with Friends of Second Marsh

- a. In 2019, Friends of Second Marsh (FSM) commenced a multi-year project called 'Let's De-Phrag the Marsh!' to manage Phragmites in Oshawa Second Marsh, McLaughlin Bay Wildlife Reserve and surrounding areas.

5. The Future of HOPA – Strategic Priorities, Goals & Opportunities for Durham

- 5.1 The HOPA delegation will be providing Committee with an overview of their strategic priorities and goals, as well as identifying opportunities specific to Durham Region in relation to the Port's growth plans. This includes:

- a. Recent collaboration projects, including attendance and collaboration with Durham Region at HANNOVER MESSE 2025 Industrial Technology Trade Fair, and collaboration on the new Durham Relocation Guide
- b. The investigation of solutions to increased climate effects, especially related to the lateral movement of sediment
- c. Connections to regional civil and residential construction sector
- d. Opportunities related to steel sector supply chain and the automotive industry
- e. Status of new partnerships with U.S. cities along the Great Lakes

6. Relationship to Strategic Plan

6.1 This report aligns with/addresses the following Strategic Direction(s) and Pathway(s) in Durham Region's 2025-2035 Strategic Plan:

- a. Connected and Vibrant Communities
 - C1. Align Regional infrastructure and asset management with projected growth, climate impacts, and community needs.
- b. Environmental Sustainability and Climate Action
 - E1. Reduce corporate greenhouse gas emissions to meet established targets.
- c. Resilient Local Economies
 - R1. Attract and retain quality employers that strengthen key economic sectors, including energy and technology.
 - R2. Support the growth of new business startups and small to medium local businesses.
 - R4. Protect and strengthen the local agriculture sector and food supply chains.
- d. Strong Relationships
 - S3. Collaborate across local area municipalities, with agencies, non-profits, and community partners to deliver co-ordinated and efficient services.

7. Conclusion

- 7.1 HOPA will be appearing as a delegation before the Community Growth and Economic Development Committee to report on recent projects and future plans for the Oshawa Port.
- 7.2 HOPA is a valued partner in attracting new investment to the Region and supporting the Regional economy. It enables international goods movement and provides agri-food producers and other industries more options to efficiently engage in domestic and international trade.

Respectfully submitted,

Original signed by

Brian Bridgeman, MCIP, RPP, PLE
Commissioner of Community Growth and
Economic Development

Recommended for Presentation to Committee

Original signed by

Elaine C. Baxter-Trahair
Chief Administrative Officer



The Regional Municipality of Durham Report

To: Community Growth and Economic Development Committee
From: Commissioner of Community Growth and Economic Development
Report: #2025-EDT-9
Date: May 6, 2025

Subject:

2024/2025 Out of Office Tourism Marketing Campaign

Recommendation:

That the Community Growth and Economic Development Committee recommends:

That this report be received for information.

Report:

1. Purpose

1.1 The purpose of this report is to provide Members of the Community Growth and Economic Development Committee a brief overview of the Region's Economic Development and Tourism Division 2024/2025 tourism marketing campaign, titled '*Out of Office*'.

2. Background

2.1 The '*Out of Office*' (OOO) promotional campaign was launched as Durham Tourism's high summer 2024 campaign. It encouraged people to book a day for themselves to get out and enjoy a daytrip to one of Durham's most popular tourism destinations such as Parkwood Estates National Historic Site, Thermea Spa Village, and the Waterfront Trail, with supplementary suggestions for many other incredible activities around the Region.

- 2.2 The target audience for the OOO campaign was working professionals from the Greater Toronto and Hamilton Area that are looking for day dates and nights. Ages for this group include the segment of 25 to 34 year-olds without children, and 55+ year-olds with adult or no children. These segments seek out experiences and enjoy concerts, theatre, culinary, and outdoor sports. These segments align with desired key marketing audiences as outlined in the [2024-2028 Durham Tourism Strategic Action Plan](#).
- 2.3 The OOO campaigns were created, developed and designed by Division staff. Related activities and materials included social media programming, creating e-newsletter lists, and deploying communications strategies across a beautiful and compelling campaign.
- 2.4 As a way of engaging the audience, Durham Tourism used an online meeting booking tool that allows potential visitors to “book a meeting with Durham Tourism”. The outcome of the audience clicking on the ‘book a meeting’ button resulted in a calendar invitation being sent to that person, which would block the participant’s actual digital calendar for the day. The calendar appointment contained an itinerary. The itinerary includes what to do, places to eat, and where to sleep, including links and helpful information about each destination.
- 2.5 Participants in the campaign also received an invitation to join the Durham Tourism e-newsletter, which is a further step of continued engagement.

3. Summer 2024 Campaign Details

- 3.1 The summer 2024 OOO campaign was very successful with 1.4 million impressions and 10,000 landing page views.
- 3.2 The Summer OOO campaign included:
- a. Advertisement on the inside front cover of Canada Travel Magazine (July 2024 issue), which is distributed to subscribers of the Globe and Mail
 - b. A week-long billboard ad in Toronto along the Gardiner Expressway, eastbound at Exhibition
 - c. Ads on Spotify, LinkedIn, Facebook, and Instagram
 - d. Organic content on LinkedIn, Facebook and Instagram;
 - e. An Instagram contest
 - f. Features in July and August’s visitor and industry e-newsletter
 - g. Landing page on Durham Tourism website with suggested itineraries

3.3 The Summer OOO campaign achieved the following results:

- a. 1,418,111 impressions
- b. 10,024 landing page views
- c. 8,680 clicks (0.65% click through rate)
- d. 255 itineraries emailed out
- e. 149 new e-news subscribers

3.4 Building on the success of the summer 2024 campaign, in late 2024, Durham Tourism applied for and was granted \$5,000 through Central Counties Tourism Partnership Out-of-Region Marketing funding to run the OOO campaign in Winter 2025.

4. Winter 2025 OOO Campaign Details

4.1 Building upon learnings and success with the summer OOO campaign, staff determined they could further optimize results. Staff contacted Thermea Spa Village marketing staff and created a partnership to hire popular Instagram influencer @WellnessTravelled to host a giveaway on their account. This contest generated significant high-quality engagement as well as strong reach to their audience.

4.2 The Winter OOO campaign included:

- a. Advertisement on the inside front cover of Canada Travel Magazine (March 2025 issue), which is distributed to subscribers of the Globe and Mail
- b. 2 week-long billboard ads in Toronto along the Gardiner Expressway eastbound at Exhibition and 401 eastbound at 427
- c. Ads on Spotify, LinkedIn, Facebook and Instagram
- d. Organic content posted to LinkedIn, Facebook and Instagram
- e. Contest collaboration with influencer @WellnessTravelled
- f. Contest and promotion to attendees of the Central Counties Tourism 2025 Symposium in Vaughan
- g. Features in January and February's visitor e-newsletter
- h. Landing page on Durham Tourism website with suggested itineraries.

4.3 The Winter OOO campaign achieved the following results:

- a. 762,331 impressions
- b. 3,608 landing page views
- c. 25,481 clicks (4.38% click through rate)
- d. 1,270 itineraries emailed out (up 498% over summer 2024 campaign)

- e. 663 new e-news subscribers (up 445% over summer 2024 campaign)
- 4.4 While the winter campaign resulted in fewer landing page views than the summer edition, the deeper engagements, along with drastically increased emailed itineraries and e-newsletter sign-ups, indicated an optimized approach to how the campaign functioned and created longer-term engagement with potential visitors.

5. Financial Implications

- 5.1 The total cost of the two OOO campaigns was \$22,978.99. The summer campaign was fully covered by the approved 2024 Economic Development and Tourism program budget, while for the winter edition, \$6,821.96 was sourced from the approved 2025 Economic Development and Tourism program budget and \$5,000 was sourced from the partnership with Central Counties Tourism.

6. Relationship to Strategic Plan

- 6.1 This report aligns with/addresses the following Strategic Direction(s) and Pathway(s) in Durham Region's 2025-2035 Strategic Plan:
- a. Connected and Vibrant Communities
 - C6. Continue to revitalize and transform downtowns into hubs of economic, social, and cultural connection.
 - b. Resilient Local Economies
 - R2. Support the growth of new business startups and small to medium local businesses.
 - R5. Cultivate and promote local arts, culture, quality of place, and tourism that embrace urban excitement and country charm.
 - c. Strong Relationships
 - S4. Advocate to the federal and provincial government and agencies to advance regional priorities.

7. Conclusion

- 7.1 The Durham Tourism Out of Office campaigns used a combination of digital media and traditional advertising to reach a specific and targeted audience of potential visitors, promote daytrip and overnight experiences, and built broad awareness of Durham's tourism offering.
- 7.2 Economic Development and Tourism Division staff will continue to collaborate with various partners to drive engagement and encourage tourism to Durham Region.

8. Attachments

Attachment #1: Out of Office Campaign marketing materials.

Respectfully submitted,

Original signed by

Brian Bridgeman, MCIP, RPP, PLE
Commissioner of Community Growth and
Economic Development

Recommended for Presentation to Committee

Original signed by

Elaine C. Baxter-Trahair
Chief Administrative Officer

Out of Office Landing Page

OUT OF OFFICE

A A A 🗨️ 📄

! REMINDER

Set your Out of Office.

Choose an itinerary and book a "very important meeting" with Durham Tourism using the links below. When you do, we'll email you helpful guide to plan your day Out of Office.

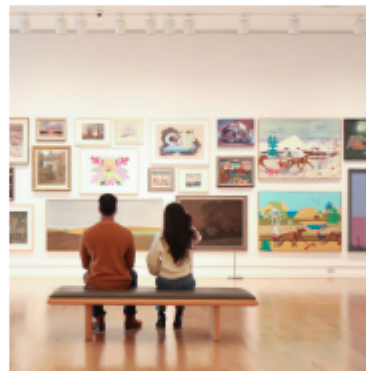


Put the "OOO" in Out of Office at a Nordic spa village

Unplug and unwind by checking into Whitby's **Thermēa Spa Village**. Enter a world where the deadlines and expense reports on your to do list are replaced by visits to the sauna, refreshing cold plunges, and relaxing by the fire. Indulge in farm-to-fork fare at an on-site restaurant. We recommend booking your visit to Thermēa in advance.

Get our itinerary recommendations and block off a day for visiting the spa now.

[Add Thermēa to your calendar](#)



Take it offline for the day and take in some art IRL

Don't let their email find you. The only thing you'll need your phone for is selfies in that just-right museum lighting. Wander through **The Robert McLaughlin Gallery** and take in the thoughtfully curated exhibitions and beautiful architecture. Afterwards, put a pin in all your responsibilities and cozy up at a local cafe or cocktail bar.

Get our itinerary recommendations and block off a day for getting cozy and cultured now.

[Add The RMG to your calendar](#)



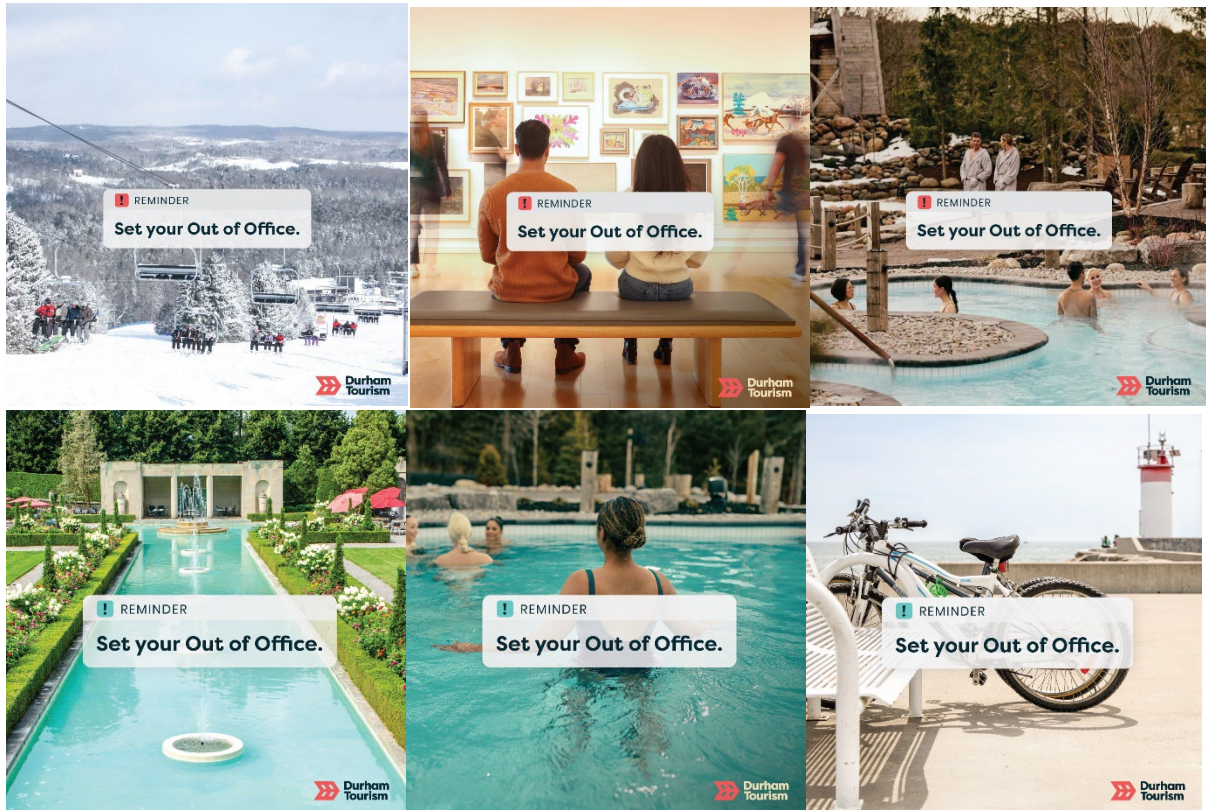
This meeting could have been a morning on the slopes

Spend your day carving up the slopes at **Brimacombe** and circle back on that meeting you missed tomorrow. Leave your phone behind in the chalet and enjoy the fresh air and the views from the ski lift. After a day outside, get warmed up at local pub **Walsh's Snug** for some après ski vibes and Irish pub classics.

Get our itinerary recommendations and block off a day for skiing or snowboarding now.

[Add Brimacombe to your calendar](#)

Social Media Posts



@WellnessTravelled Giveaway Reel



CLOSED ✖️ ✨ **G I V E A W A Y** ✨ Spa day for 2 at...
February 19 - Duration 0:28

📍 4.6K 💬 16K 📌 3.1K 📌 693

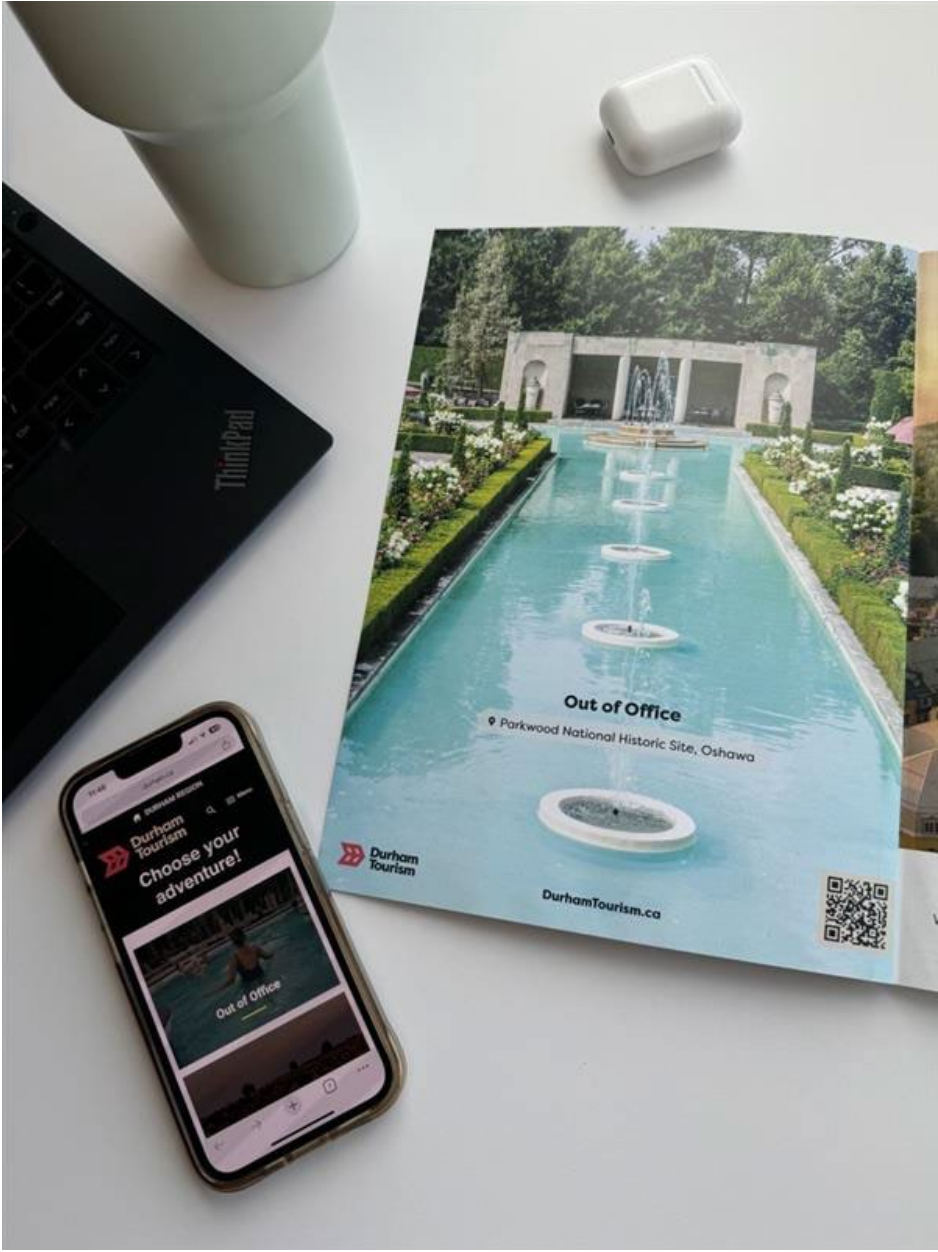
Overview ⓘ

| | |
|--------------|-----------------|
| Views | 280,399 |
| Watch time | 13d 22h 39m 13s |
| Interactions | 24,391 |


Billboard



Canada Travel Magazine Ad



Sample Itinerary Email


 Thermëa Spa Village Itinerary



Durham Tourism <notifications@calendly.com>

To  Chelsea Lawrence

Retention Policy 7 Year Delete (7 years)


 You forwarded this message on 2025-01-20 2:46 PM.





Expires 2032-01-21




Do you really have a meeting booked at Thermëa Spa Village? No. Should you book a day and go? Yes. [Book your spot at Thermëa](#) and unplug for the day. Here is your suggested itinerary:

 **Morning:** Start your day off by enjoying a leisurely coffee at one of downtown Whitby's many coffee shops. Whether you stop in at [Brock Street Espresso](#), [Jacked Up Coffee](#), or [The Souk](#) (closed Mondays) you'll be delighted with every sip.

 **All Day:** Check in to [Thermëa Spa Village](#) and check out of your regular daily routine. Instead, embrace the thermal cycle that encourages spa guests to rotate between the warmth of the saunas and steam rooms, the cold of the plunge pools, and rest in the baths or cozy chairs. Spa treatments and add-ons are available to book if you'd like to take your relaxation to another level. When hunger strikes, visit one of three on-site restaurants, all of which offer menus that perfectly balance indulgence and health.

 **Night:** End your day by tucking into bed at the [Residence Inn Whitby](#). If you haven't gotten your fill of water-based relaxation, you can take advantage of the indoor pool and whirlpool. Enjoy a free hot breakfast in the morning.

[Directions on Google Maps](#)

 Don't forget to show us your OOO day and tag [@DurhamTourism](#) on Instagram.



The Regional Municipality of Durham Report

To: Community Growth and Economic Development Committee
From: Commissioner of Community Growth and Economic Development
Report: #2025-EDT-10
Date: May 6, 2025

Subject:

Durham Region Music Industry Analysis and Forum

Recommendation:

That the Community Growth and Economic Development Committee recommends:

That this report be received for information.

Report:

1. Purpose

- 1.1 The purpose of this report is to provide members of the Community Growth and Economic Development Committee with an overview of the “Durham Region Music Industry Analysis” report prepared by global consulting firm Nordicity. (see Attachment #1)
- 1.2 Additionally, this report outlines the background work, opportunities, and potential next steps for Economic Development and Tourism Division staff to pursue as they support the growth of Durham Region’s music industry.

2. Background

- 2.1 Municipalities and communities around the world are recognizing the music industry as a valuable economic driver and the importance of supporting and investing in their music ecosystems. A robust music economy fuels job creation, economic

growth, tourism product development, artistic growth, and strengthens a region's brand identity while also attracting talented workforce.

- 2.2 In 2021, Economic Development and Tourism Division staff engaged in conversations with Creative Industries professionals from across Durham Region to explore recovery of the music industry following pandemic impacts. The music industry was hit hard by the Covid pandemic. Durham Region has always had a robust music tourism offering, but the recent conversations have shown that our music communities would benefit from a region-wide, collaborative and data-led approach to supporting and growing the industry.
- 2.3 Durham Region's music industry is primed for growth with strong grassroots support through festivals and events, established recording studios, and its role in developing internationally renowned musicians and acts.
- 2.4 Staff began to explore various funding models and partnerships to progress this vision to engage with the industry further and recommend concrete actions and best practices. Meanwhile, staff also began work on a new Economic Development and Tourism strategy.
- 2.5 In 2023, the Regional Municipality of Durham released [Ready, Set, Future: A PLACE Blueprint for Durham](#), a 5-year economic development and tourism strategy and action plan which identified music as an industry of interest in Durham's priority cluster of arts, culture, and creative industries.
- 2.6 Ready Set Future identified that to drive development within the music industry, a comprehensive analysis of assets and capabilities was required, with the intention of using the information to develop future actions.
- 2.7 In May 2024, six companies were engaged to provide quotes to complete this work. In June 2024, Nordicity was engaged as the successful candidate to develop the attached study based on their expertise in creative economy assessments and strategic planning, including focus on investment attraction and industry development.
- 2.8 This global consulting firm has led national music industry strategic studies for Canada's music publishing, marketing, and distribution organization, and has completed numerous music impact studies, needs assessments, and festival and events studies.

2.9 The analysis was developed through municipal, community, and artist consultations and new research. The goal was to understand the specific context and needs of the region's music community and to identify potential areas of opportunity that could contribute to establishing Durham as a Music Region.

3. Previous Reports and Decisions

3.1 October 5, 2021 Durham Region – Music Sector Strategy Project [#2021-EDT-7](#)

4. Durham Region Music Industry Community Outreach Events and Analysis

Purpose and Scope

- 4.1 The overall purpose of the study is to support current activity and grow Durham Region's music ecosystem, enabling job creation, the attraction of talent, and to drive sustainable tourism, and to do so inclusively across all communities and demographics.
- 4.2 Nordicity used a four-phase mixed-method approach to perform an analysis tailored specifically to Durham: Project Scoping; Data Collection and Research; Analysis; Reporting.
- 4.3 In support of the industry research, Economic Development and Tourism staff organized and hosted three music industry development events: one each in Town of Ajax, City of Oshawa, and Township of Uxbridge.
- 4.4 A total of 360 music stakeholders registered, including musicians, writers, composers, music-related businesses, venue operators, concert promoters, supportive organizations, music festival and events representatives, as well as students and educators.
- 4.5 Each event opened with a refreshment and networking hour and showcased a variety of local performers: Paper Cages; Matthew Hotlby; Azalyne Klukowski; and Hollow Sage. The forum's keynote speaker was Bob Egan, a seasoned musician, and Blue Rodeo and Wilco band member who in recent years developed Kitchener's Film and Music Office. With his experience and enthusiasm, Egan connected well with the audiences and created a platform for creative strategic brainstorming.

- 4.6 Tony Sutherland, from the Durham College Music Business Management program, facilitated group discussions where attendees could share experiences and ideas, and collectively build actionable strategies that could shape the future of the local music industry.
- 4.7 In addition to the events, a music industry survey was deployed and promoted throughout November 2024 to gather quantitative data to supplement the more qualitative responses received through the public engagement sessions.
- 4.8 The primary audience for the survey was the music industry, but it also included the broader public to build a broader understanding of how residents are engaging with music in the region.
- 4.9 The event and survey insights were analyzed by Nordicity with research from other sources, and compiled into a music region report, included as Attachment #1.

Key Highlights

4.10 Strengths and Opportunities:

- a. Durham demonstrates significant potential as an up-and-coming music hub, supported by a network of artists, venues, and audiences with a strong appetite for live music.
- b. The high percentage of music industry professionals that participated in the forum, survey, and process is a testament to the collaborative energy and engagement of this industry which will help fuel its growth.
- c. At the time of this study, Durham has more than 469 music-related assets (not including individual musicians), comprised of venues and music spaces, businesses, organizations, music industry professionals, celebrations, festivals, and events.
- d. 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-equivalent jobs
- e. Durham is home to 74 music-related festivals and events, and the starting ground of notable artists such as Shawn Mendes, Dizzy, Lindsay Schoolcraft, k-os, Meghan Patrick, and Boi-1da, evidence of a strong foundation from which to grow.

- f. The region's music scene, though dominated by rock, folk, indie, and country, also supports niche genres such as underground punk.
- g. The region benefits from an experienced pool of music professionals, many having over 16 years of experience according to survey findings, which helps to foster mentorship and talent development.
- h. There are many places and spaces in Durham Region to attend live music. A total of 125 spaces and venues were identified in the industry asset list including a handful of larger venues and convention centres that can accommodate more than 500 attendees.
- i. 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 industry over time.
- j. Music (particularly live music performances and concerts) plays a role in driving tourism. Approximately 74,500 annual visits are made to and within Durham Region that involve participating in festivals/fairs or cultural performance activities.
- k. Cross-industry collaboration, such as by fostering platforms for connection between the local music and film industry, would help to support both ecosystems and provide mutually beneficial opportunities.

4.11 Weaknesses and Threats:

- a. Durham's music industry is challenged by insufficient policies or programs that are music-friendly, and a lack of varied performance and rehearsal spaces.
- b. There are also a lack of available business supports, and limited funding, that together hinder the growth of local artists and businesses.
- c. The region struggles with talent and audience retention, as many artists move to Toronto for more opportunities.
- d. Audience engagement is dampened by logistical issues (especially related to travel) and the absence of significant promotion and awareness.
- e. The rising cost of living, infrastructure limitations, and post-pandemic challenges are not unique to Durham but are systemic challenges facing the music industry across Canada.

5. Key Priority Areas

- 5.1 Key priorities for Durham's music industry emerged from research findings. These areas include:

- a. Spaces and Places, including the need for all-ages venues, and policies to enable the activation of public spaces;
- b. Visibility and Celebration, including the need to champion local artists, better integrate music activities into communications and promotional content, and actioning the Festival Incubator as recommended in Ready Set Future;
- c. Supportive Ecosystem, including bylaw and policy reviews, the establishment of a municipal liaison and champion for the industry or exploring regional funding models;
- d. Connection and Collaboration, including regular networking events and forums, databases and information leadership, collaboration between municipalities and cities across the province;
- e. Talent Pipeline and Skill Building, including professional development opportunities, career fairs or other incubation, or internship programs to help support talent growth.

6. Next Steps

- 6.1 Economic Development and Tourism staff launched a music industry working group in March 2025 to help strengthen Durham's music ecosystem and guide plans to grow this industry.
- 6.2 Economic Development and Tourism staff will distribute this report and attachment to the area municipalities and work through the Durham Economic Development Partnership (DEDP) to identify opportunities and next steps that local municipalities may action.
- 6.3 Future Regional initiatives will be identified in an annual plan, which will be supported initially by a budget amount identified within existing Economic Development and Tourism approved 2025 funds.
- 6.4 Future initiatives may include developing or supporting events that provide opportunities for music stakeholders to make new connections, industry education opportunities, the creation of a music office, initiating supportive policies or platforms to showcase emerging performers, and other initiatives that enable the development of Durham's music industry.

7. Relationship to Strategic Plan

- 7.1 This report aligns with/addresses the following Strategic Direction(s) and Pathway(s) in Durham Region's 2025-2035 Strategic Plan:

a. Connected and Vibrant Communities

- C6. Continue to revitalize and transform downtowns into hubs of economic, social, and cultural connection.
- C7. Create accessible, lively, and culturally welcoming public spaces, including opportunities to access nature.

b. Resilient Local Economies

- R2. Support the growth of new business startups and small to medium local businesses.
- R3. Develop, attract, and support a skilled and qualified workforce, including youth and newcomers.
- R5. Cultivate and promote local arts, culture, quality of place, and tourism that embrace urban excitement and country charm.

c. Strong Relationships

- S1. Enhance inclusive opportunities for community engagement and meaningful collaboration.
- S2. Build and strengthen respectful relationships with First Nations, Inuit, Métis, and urban Indigenous communities.
- S3. Collaborate across local area municipalities, with agencies, non-profits, and community partners to deliver co-ordinated and efficient services.

7.2 This report aligns with/addresses the following Foundation(s) in Durham Region's 2025-2035 Strategic Plan:

- a. People: Making the Region of Durham a great place to work, attracting, and retaining talent.

8. Conclusion

8.1 The Music Industry Analysis and Forum provides strong background documentation for future collaboration between the Region, municipalities, and the music community.

8.2 By leveraging existing strengths and resources 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.

8.3 Durham's music industry offers exceptional economic potential. With the industry contributing local economic impact of \$162 million in GDP, \$110 million in labour income, and supporting nearly 5,000 jobs, implementing actions in the attached report can act to support and enable growth of the industry, to grow the industry's economic impact, creating jobs, and improving the vibrancy and livability Durham Region.

8.4 In light of the strong potential economic and social benefits of a vibrant music industry, staff will be examining opportunities to further implement the suggested actions from the Music Industry Analysis Report, through the 2026 Business Plans and Budget process.

9. Attachments

Attachment #1: Durham Region Music Industry Analysis

Respectfully submitted,

Original signed by

Brian Bridgeman, MCIP, RPP, PLE
Commissioner of Community Growth and
Economic Development

Recommended for Presentation to Committee

Original signed by

Elaine C. Baxter-Trahair
Chief Administrative Officer



Durham Region

Music Industry Analysis

Prepared for: The Regional Municipality of Durham

March 17, 2025



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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).¹

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.

¹ 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.² 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.

² 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.³ It increases quality of life for communities by providing connection, cohesion, and cultural expression, often bridging diversity and promoting inclusivity.⁴ 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.⁵

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 | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> What trends could cause Durham problems in the future? |

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

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

⁵ 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

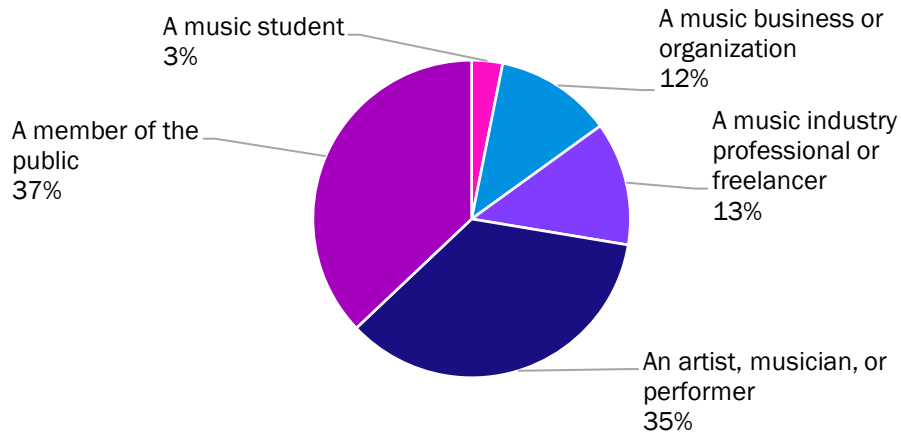
Nordicity reviewed relevant regional strategies and resources, including *Ready, Set, Future: A PLACE Blueprint for Durham*, *Envision Durham: Regional Official Plan*, various online resources through Durham Region, Invest Durham, and Durham Tourism, and where possible, relevant strategies from the municipalities 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.⁶

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.⁷

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

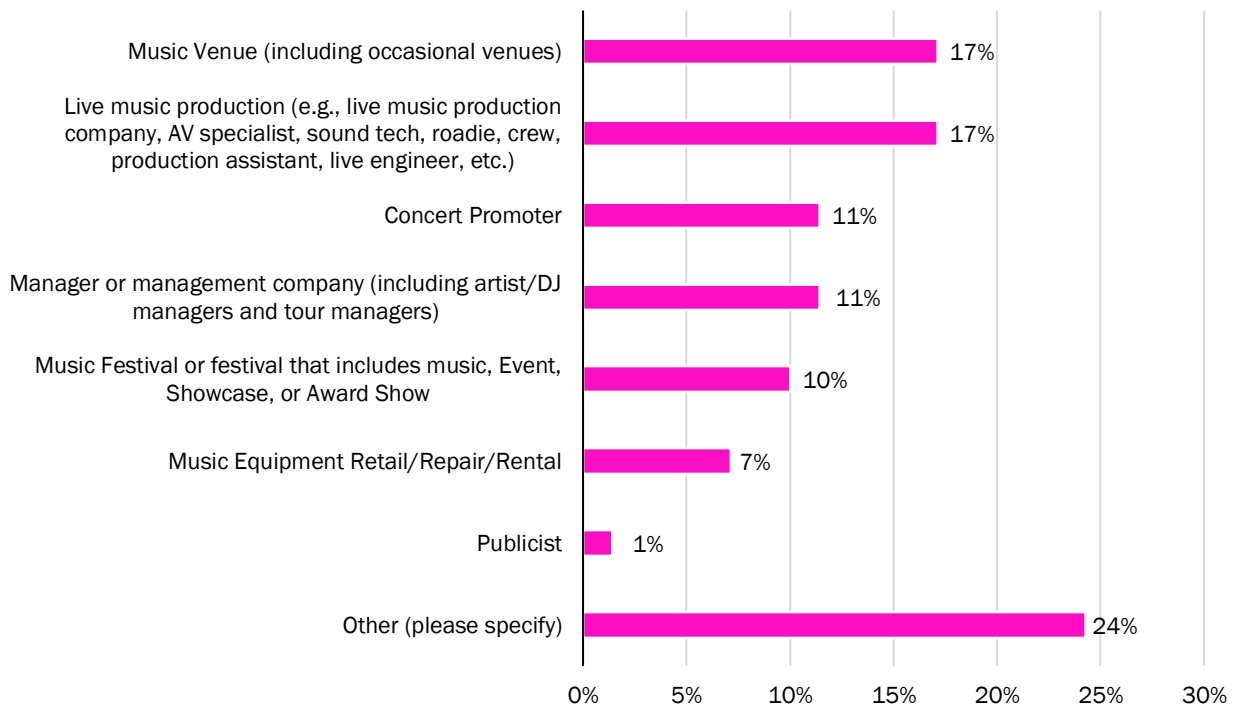
⁶ Please see the Policy Review Guide in Appendix B.

⁷ 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.⁸

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

⁸ 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).⁹ 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

⁹ 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.¹⁰ 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%).¹¹ 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

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

¹¹ 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,¹² 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.¹³ 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.¹⁴ 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.”¹⁵ 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.”¹⁶ 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.¹⁷ This unavailability of funding

¹² Invest Durham. “Filming In Durham.”

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

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

¹⁵ See Figure 14: Music Attributes in Durham Ranked (n=171)

¹⁶ See Figure 14: Music Attributes in Durham Ranked (n=171)

¹⁷ 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,¹⁸ 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)¹⁹ 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.²⁰ 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.²¹ 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,²² the current

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

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

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

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

²² 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.

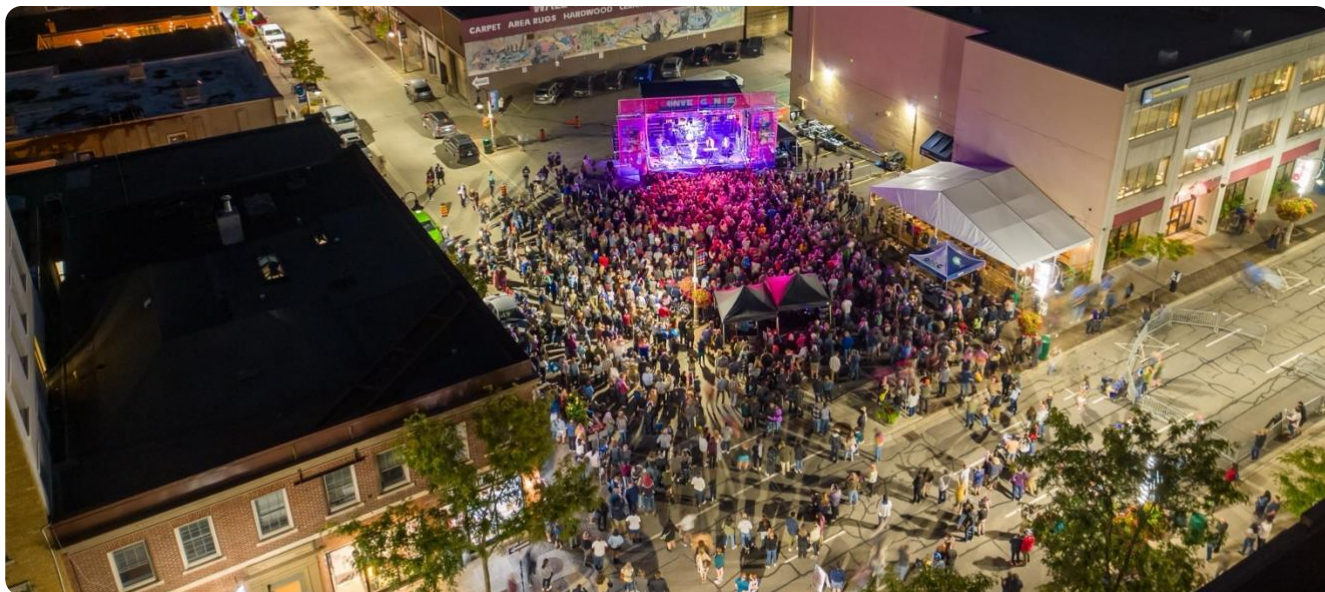
Business supports: Local music business and artists report the need for more business supports to help with various aspects of their operations and offerings. According to survey findings, 59% of respondents ranked the availability of business-specific supports for the industry as “poor” or “very poor.”²³ Specifically, supports and resources related to marketing and promotion, grant writing assistance, and networking events are in high.²⁴ 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

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

²⁴ 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 |



| | | | | |
|-------------------------------|--------------|--------------|--------------|----------------------|
| Gross Domestic Product | \$62,489,000 | \$54,921,000 | \$21,439,000 | \$138,849,000 |
|-------------------------------|--------------|--------------|--------------|----------------------|

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 |
|-------------------------------|---------------|-----------------|----------------|---------------------|
| Employment (FTEs) | 650 | 40 | 14 | 704 |
| Labour Income | \$4,286,000 | \$2,700,000 | \$913,000 | \$7,899,000 |
| Gross Domestic Product | \$7,105,000 | \$4,441,000 | \$1,904,000 | \$13,450,000 |

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 that²⁵:

- 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.

²⁵ 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.²⁶ 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.²⁷ 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

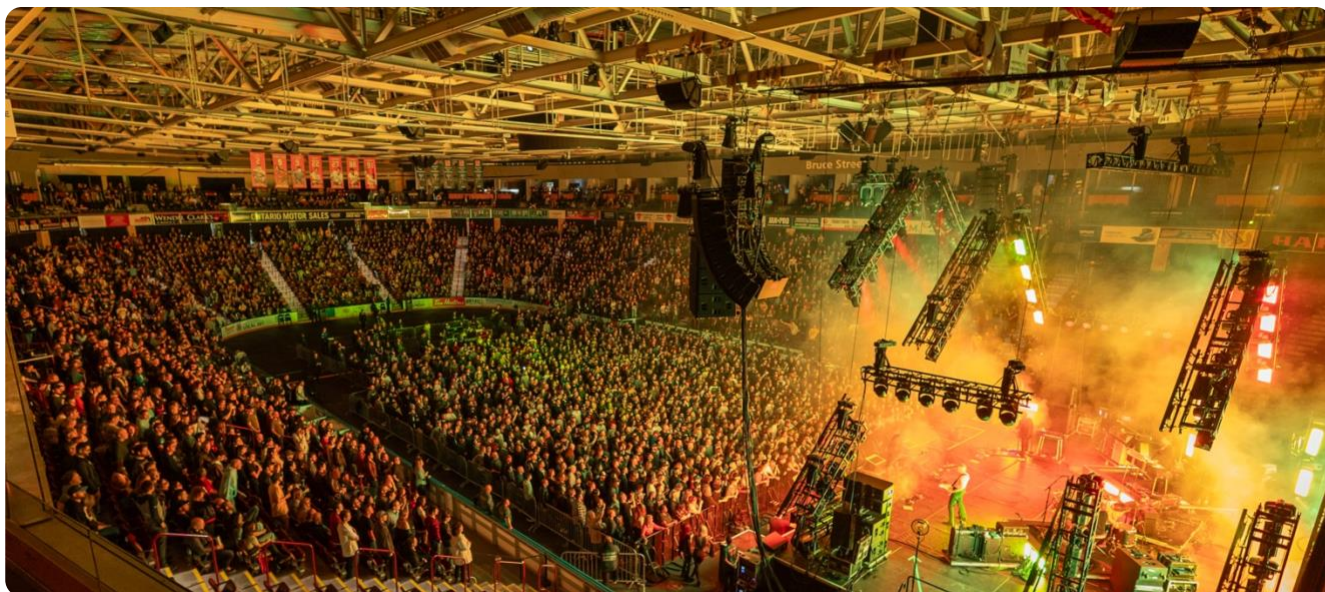
| | Direct Impact | Indirect Impact | Induced Impact | Total Impact |
|-------------------------------|---------------|-----------------|----------------|---------------------|
| Employment (FTEs) | 101 | 13 | 11 | 124 |
| Labour Income | \$3,858,000 | \$954,000 | \$1,031,000 | \$5,843,000 |
| Gross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

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.

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

²⁷ 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,²⁸ 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

²⁸ 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,²⁹ that would increase access across Durham's eight municipalities, thus better connecting the music industry and encouraging audience attendance within Durham and neighbouring areas.

²⁹ 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 |

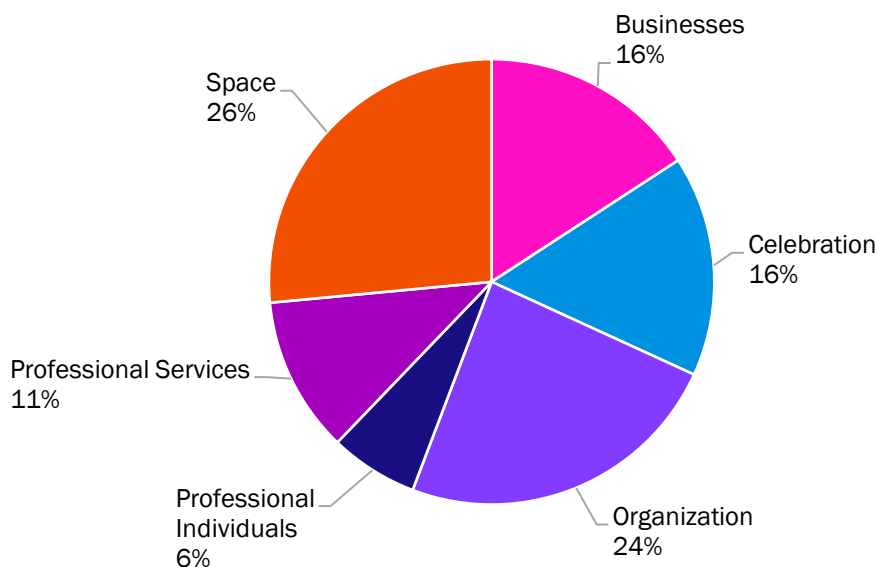


| | | |
|--|--|----|
| | Festivals and events that include live music | 44 |
| | Indigenous celebrations and events | 3 |
| | Cultural celebrations and events | 8 |

*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



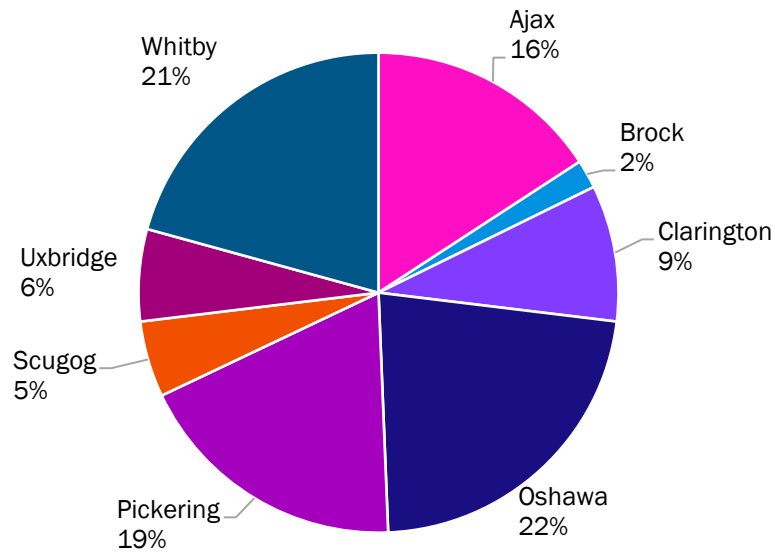
Source: Nordicity Research

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),³⁰ 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

³⁰ 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%.³¹ 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

³¹ 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.³² 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).³³

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

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



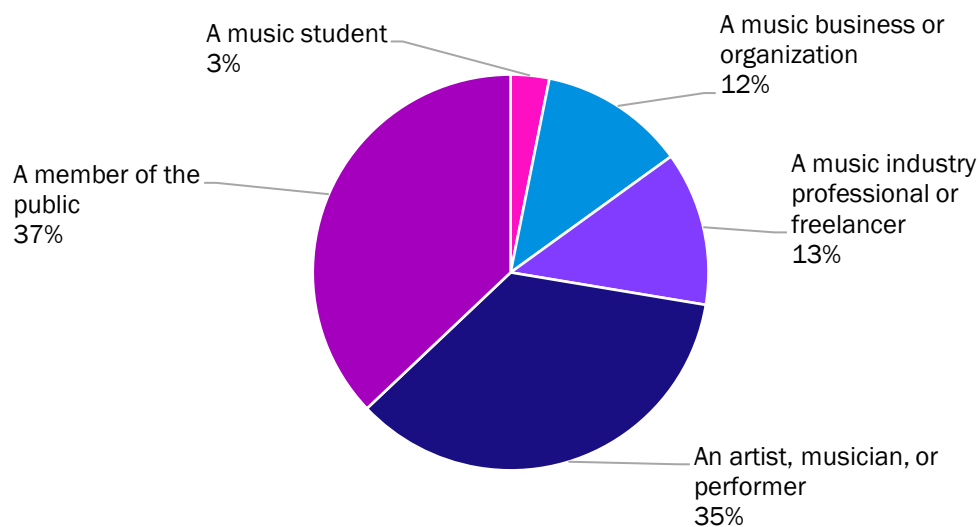
Appendix C: Survey Results

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)

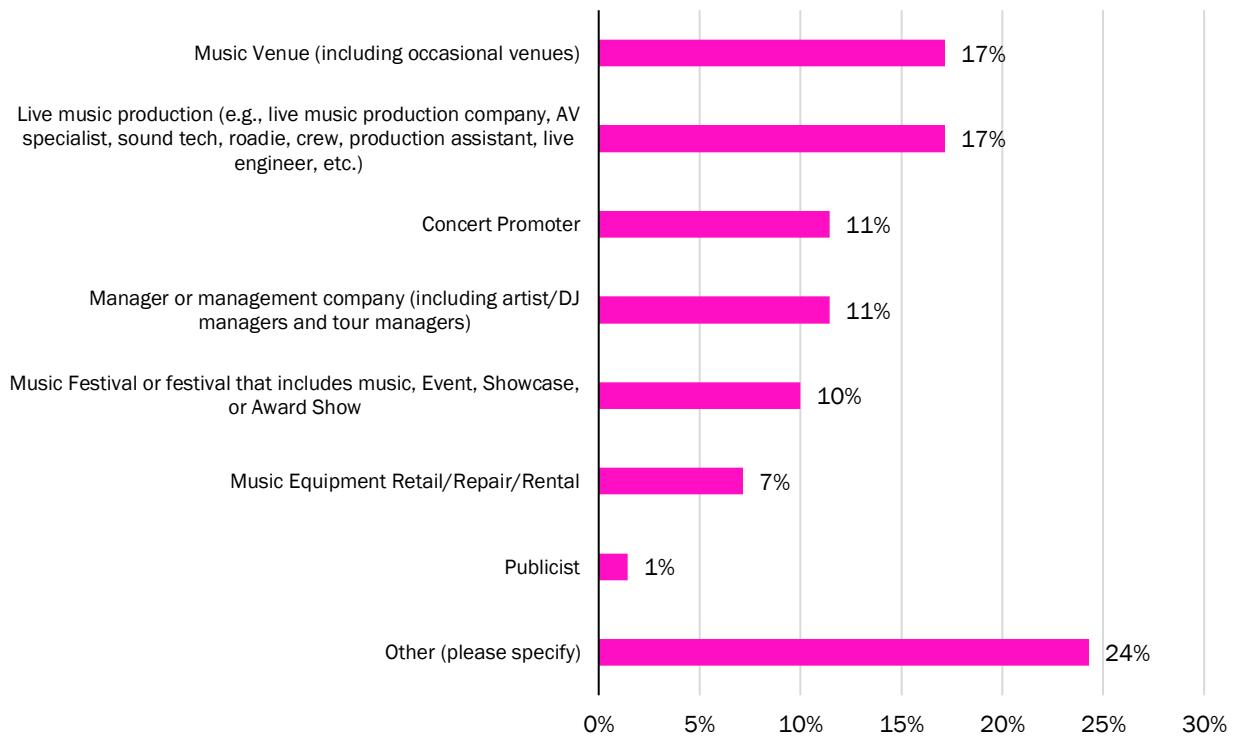


Source: Nordicity, Durham Music Industry Analysis Survey

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)

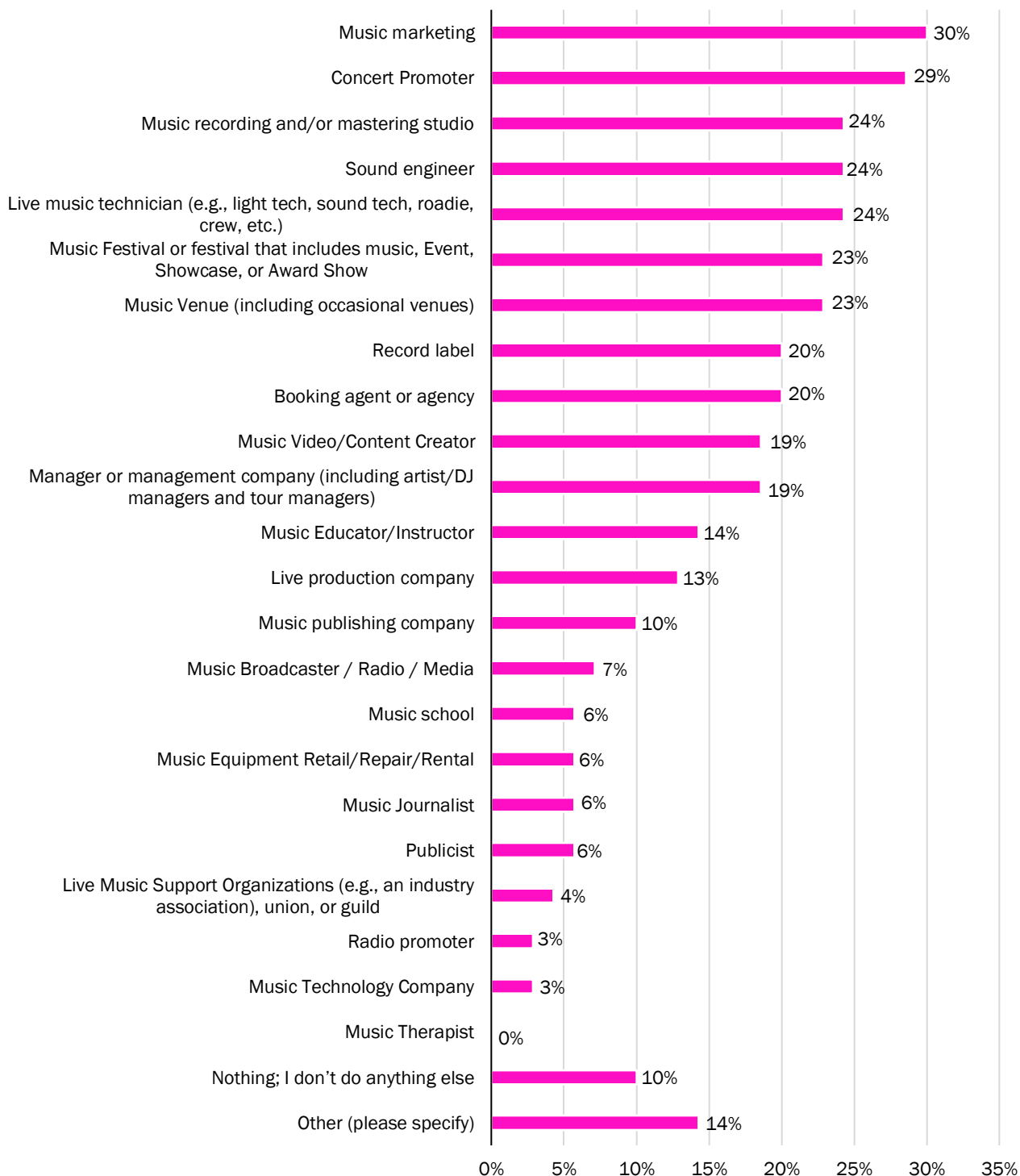


Source: Nordicity, Durham Music Industry Analysis Survey

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)

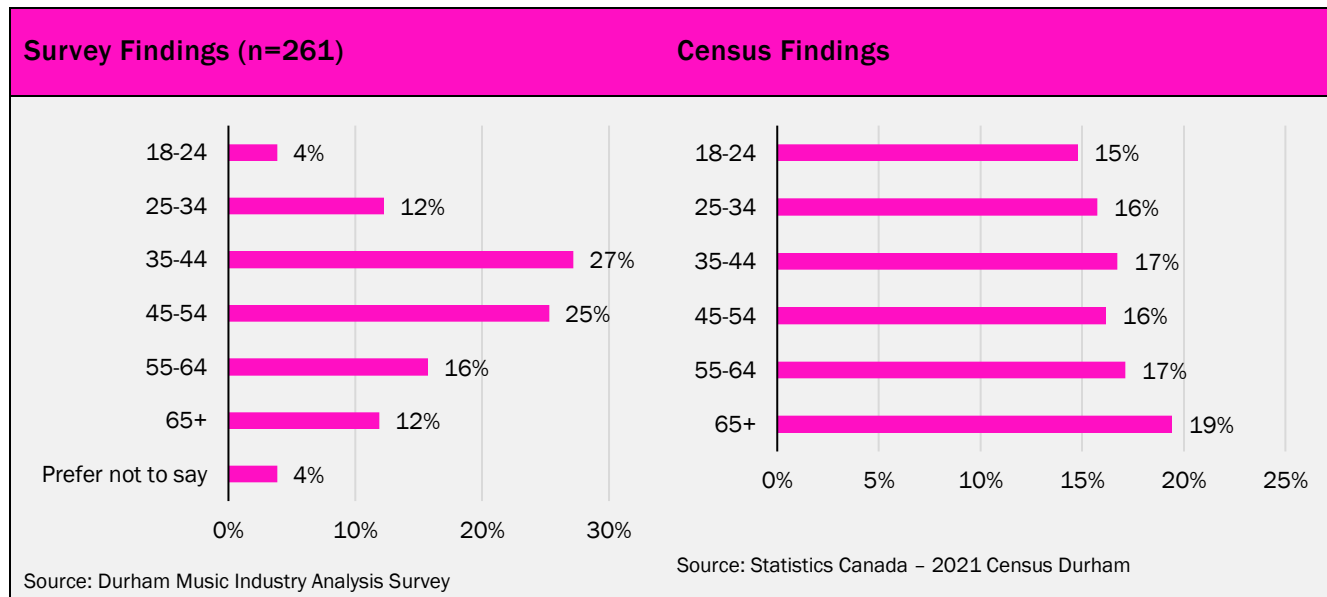


Source: Nordicity, Durham Music Industry Analysis Survey



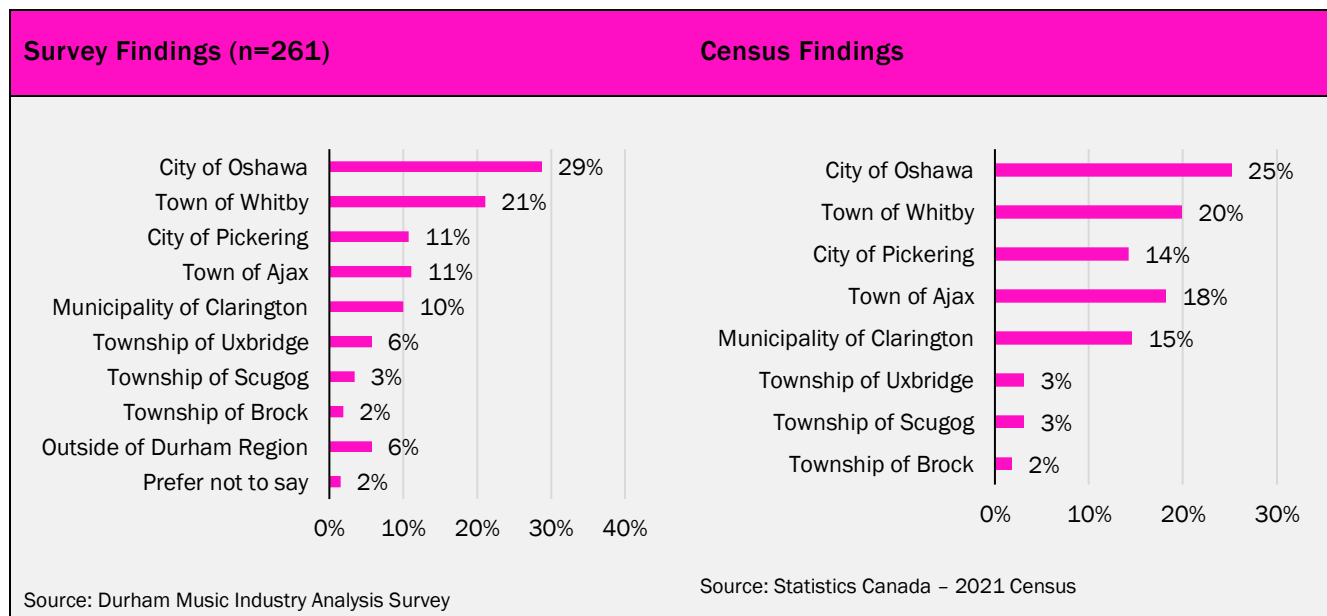
Overall, in relation to actual population, the survey garnered a relatively high number of responses from those between the ages of 35-44 and 45-54, but low rates for those between 18-24 and over 65+.

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.

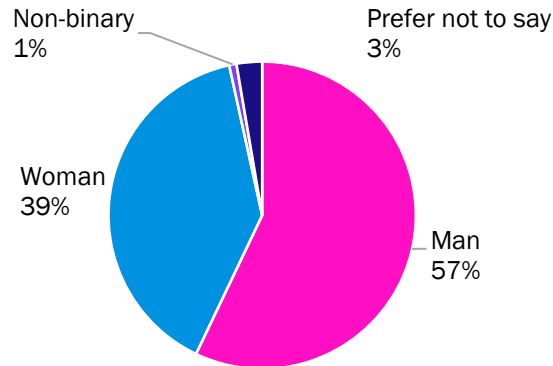
Figure 11: Survey Participant Residence





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.

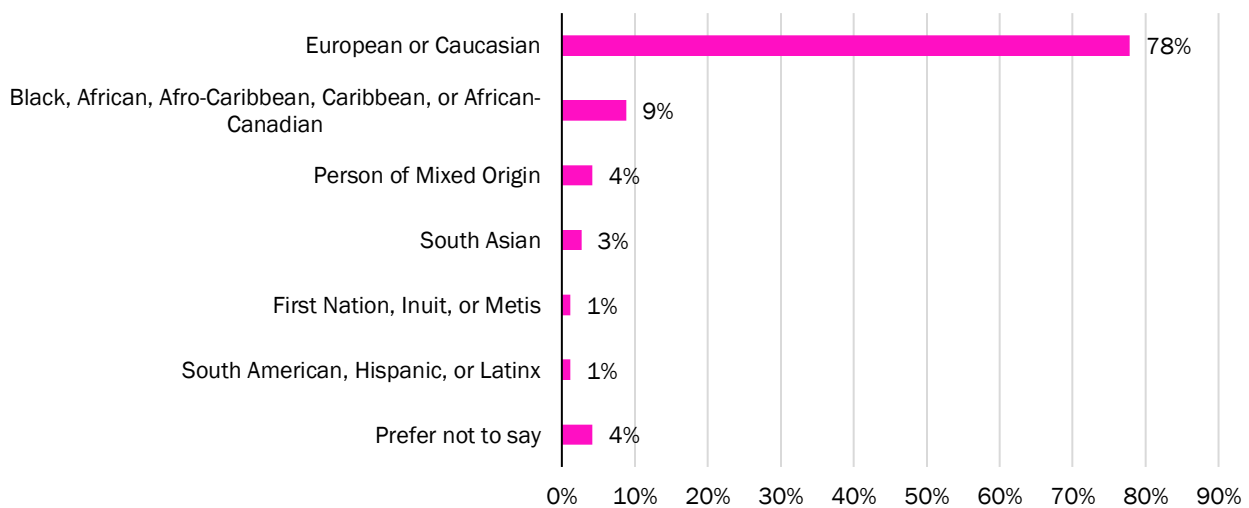
Figure 12: Survey Participant Gender (n=261)



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



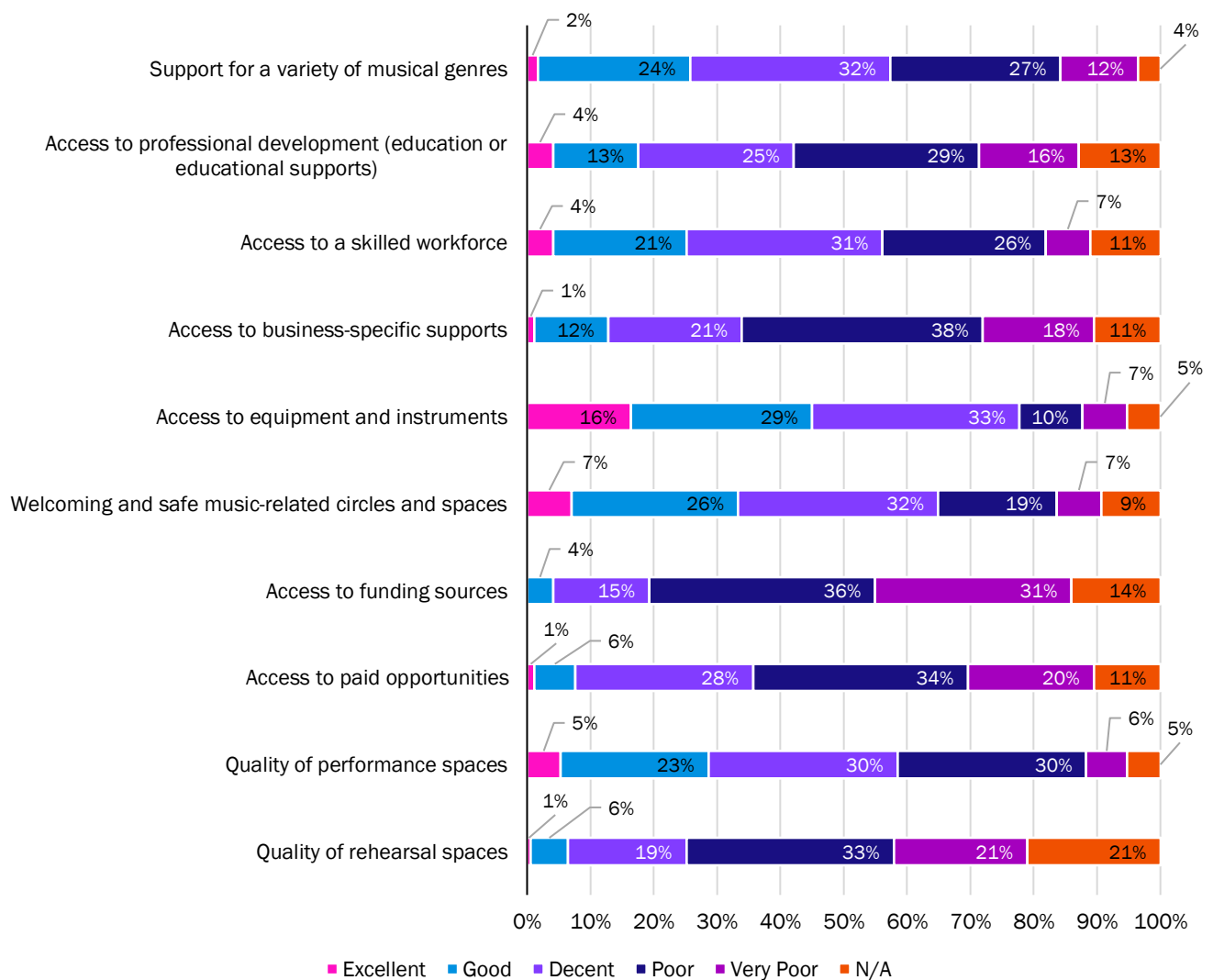
Source: Durham Music Industry Analysis Survey



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

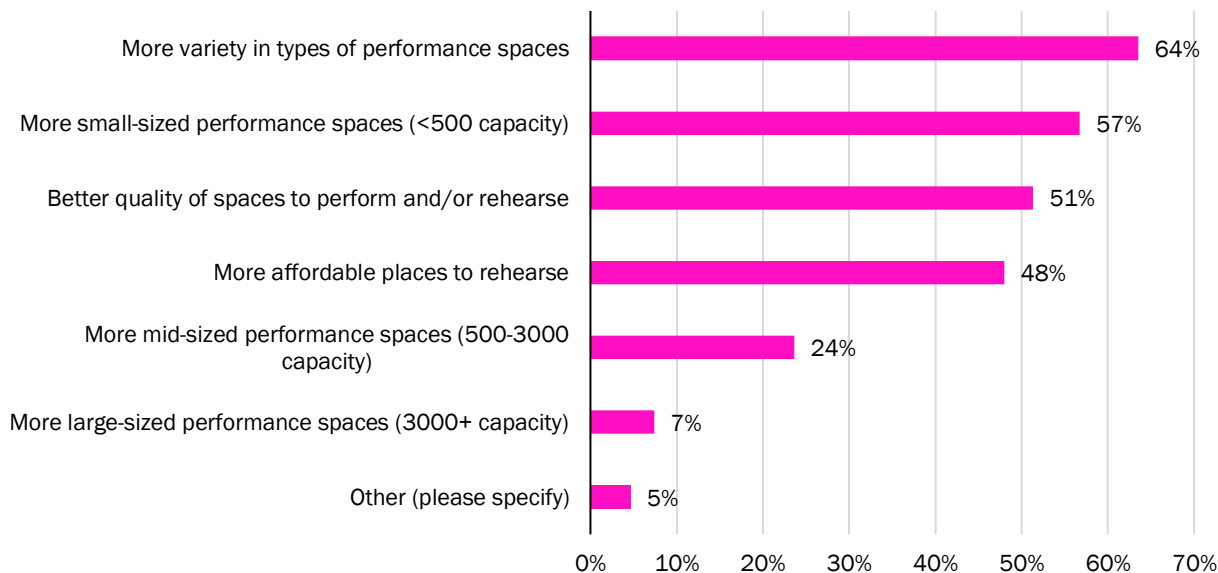
Newer artists (i.e., those with five or fewer years in the industry) rate the above attributes more positively than those who have been in the industry for over 20 years. This finding suggests there may be differing levels of awareness in terms of the supports, access, and quality of spaces available.

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.

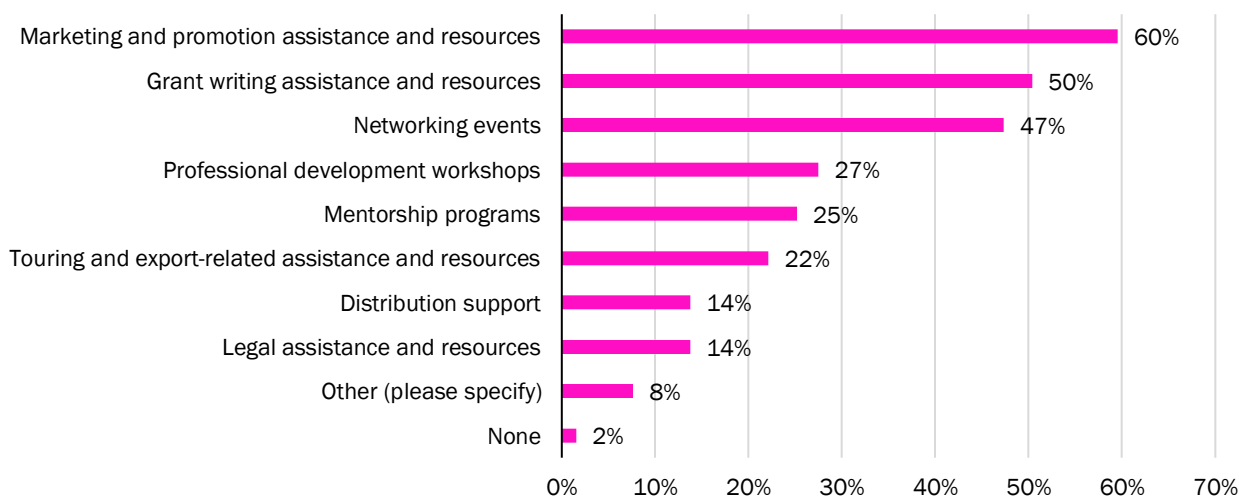
Figure 15: Music Space Needs (n=148)



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)

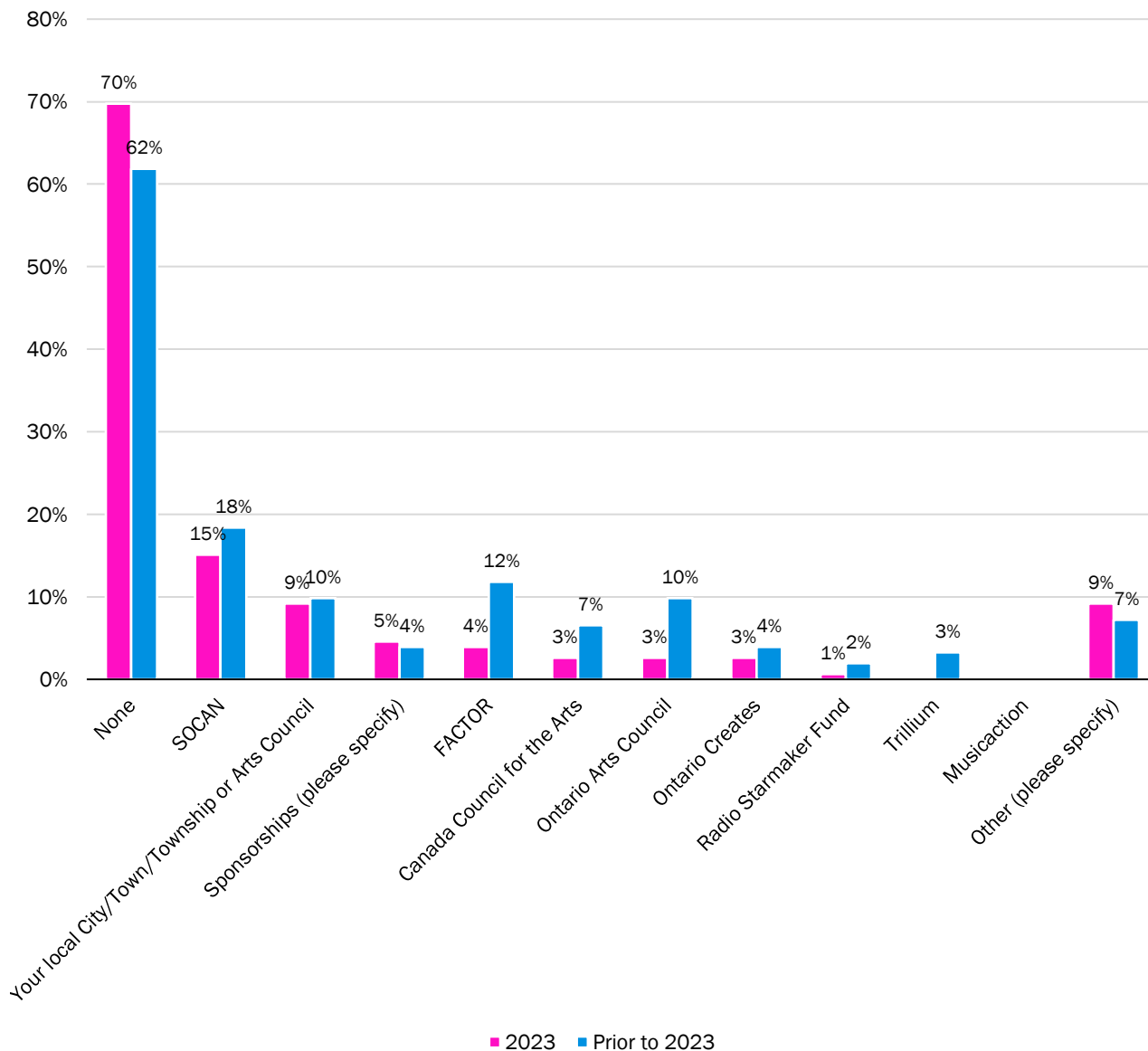


Source: Durham Music Industry Analysis Survey



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)



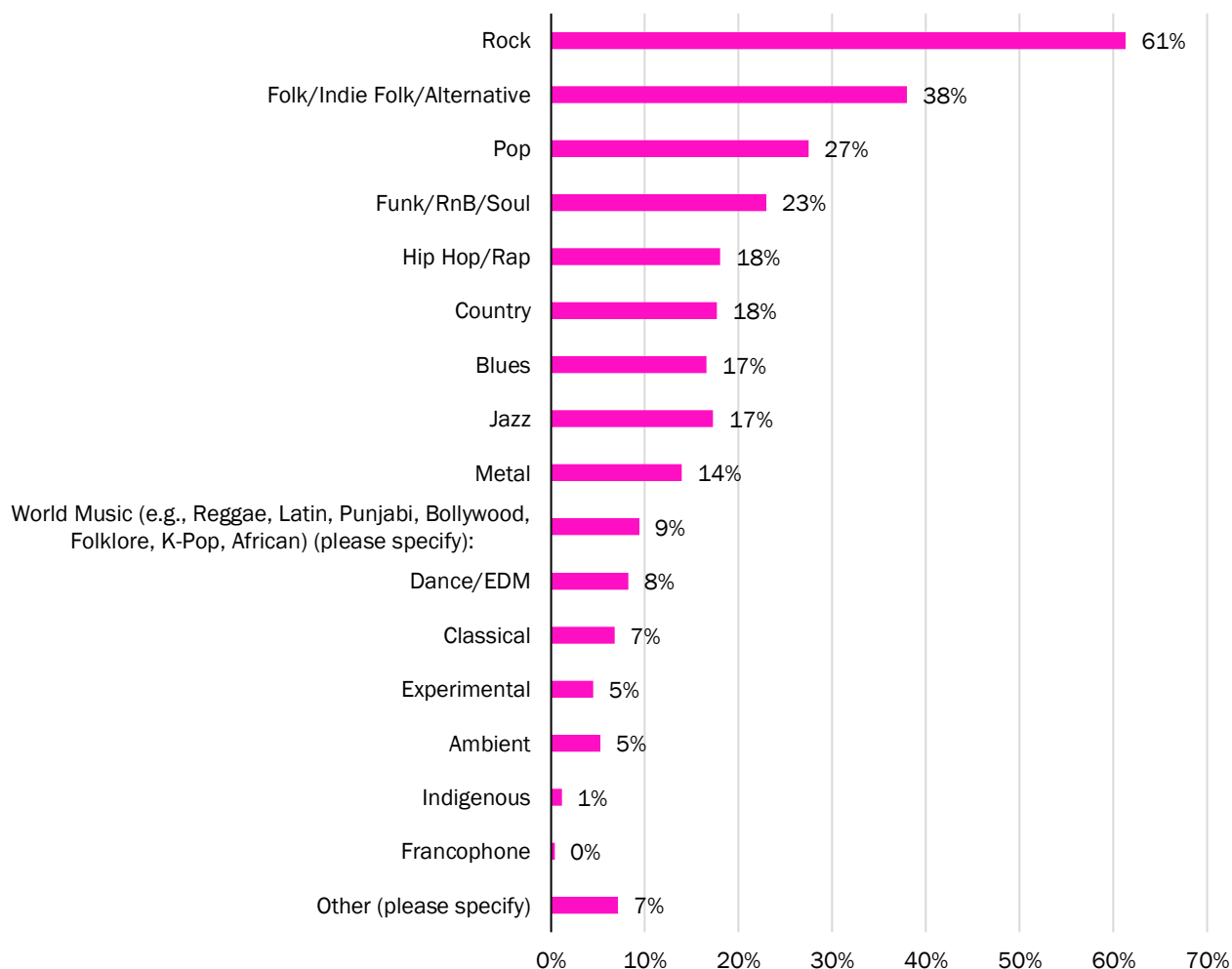
Source: Durham Music Industry Analysis Survey



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)

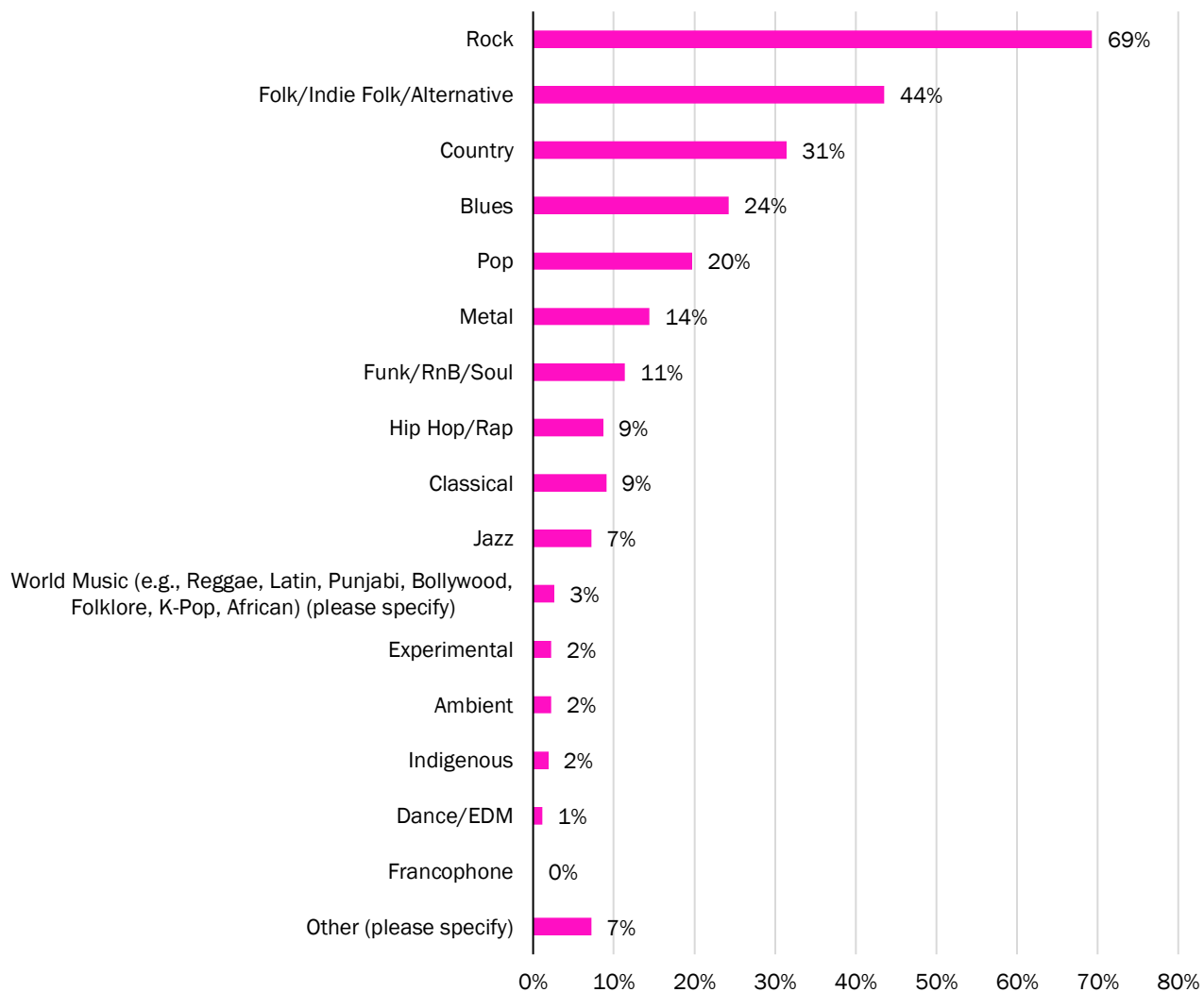


Source: Durham Music Industry Analysis Survey

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)

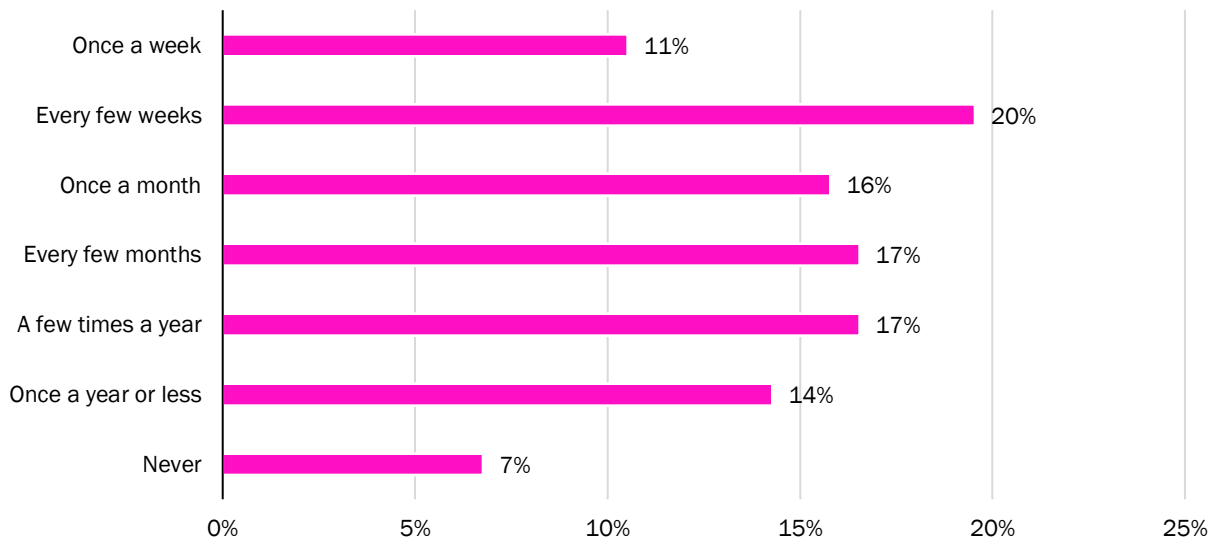


Source: Durham Music Industry Analysis Survey

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.



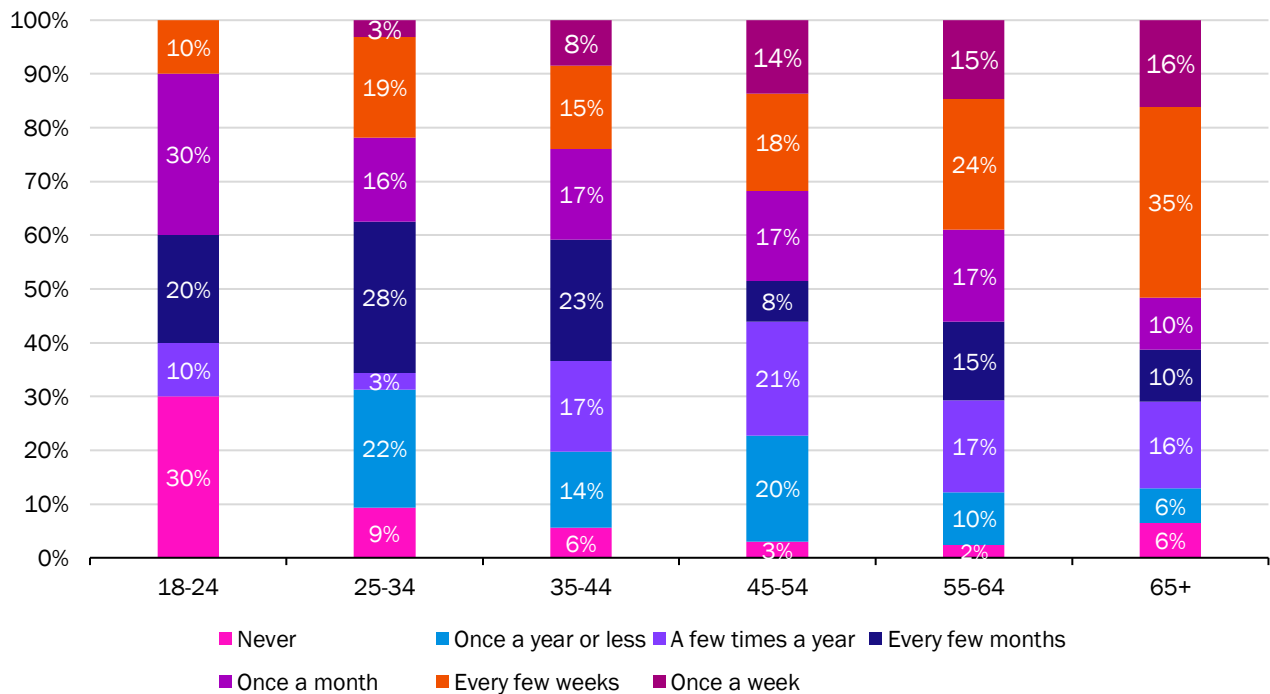
Figure 20: Live Music Frequency in Durham Region (n=266)



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

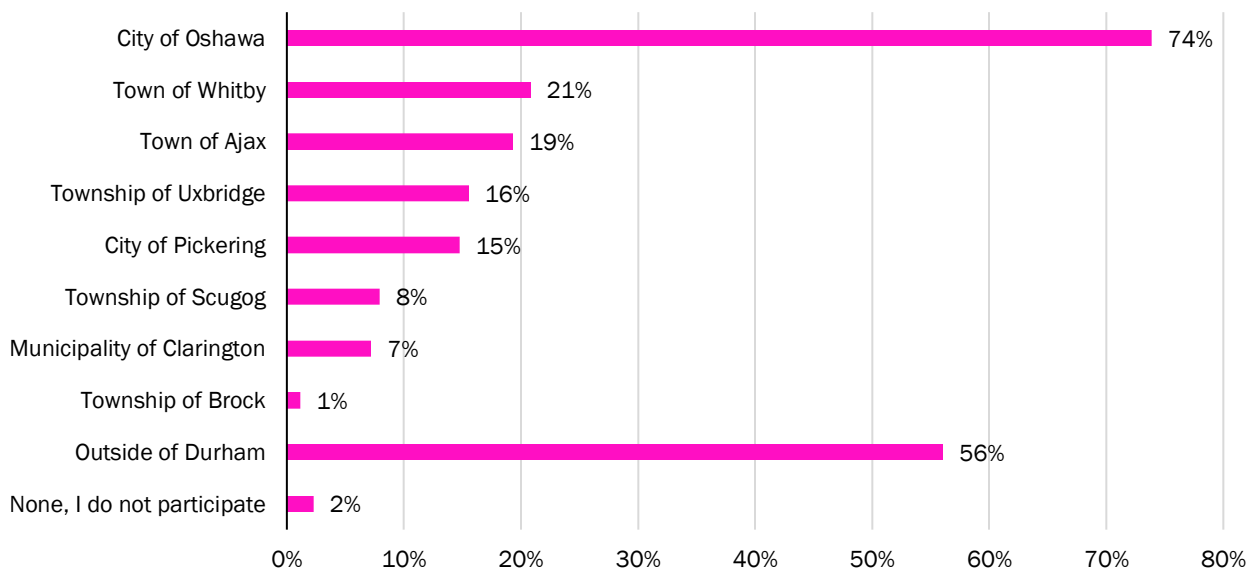


Source: Durham Music Industry Analysis Survey



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%).

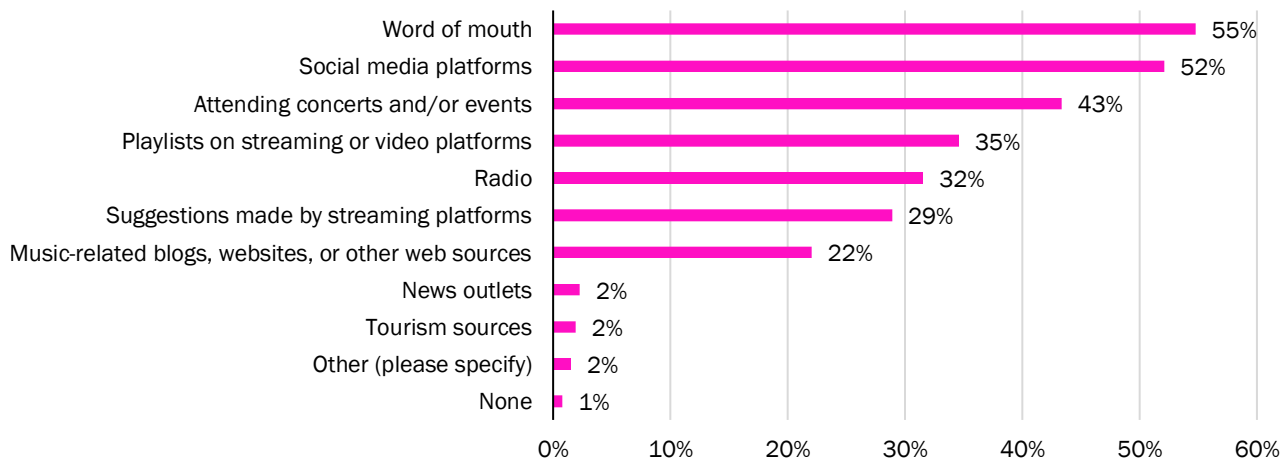
Figure 22: Locations Frequented to See Live Music (n=264)



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)

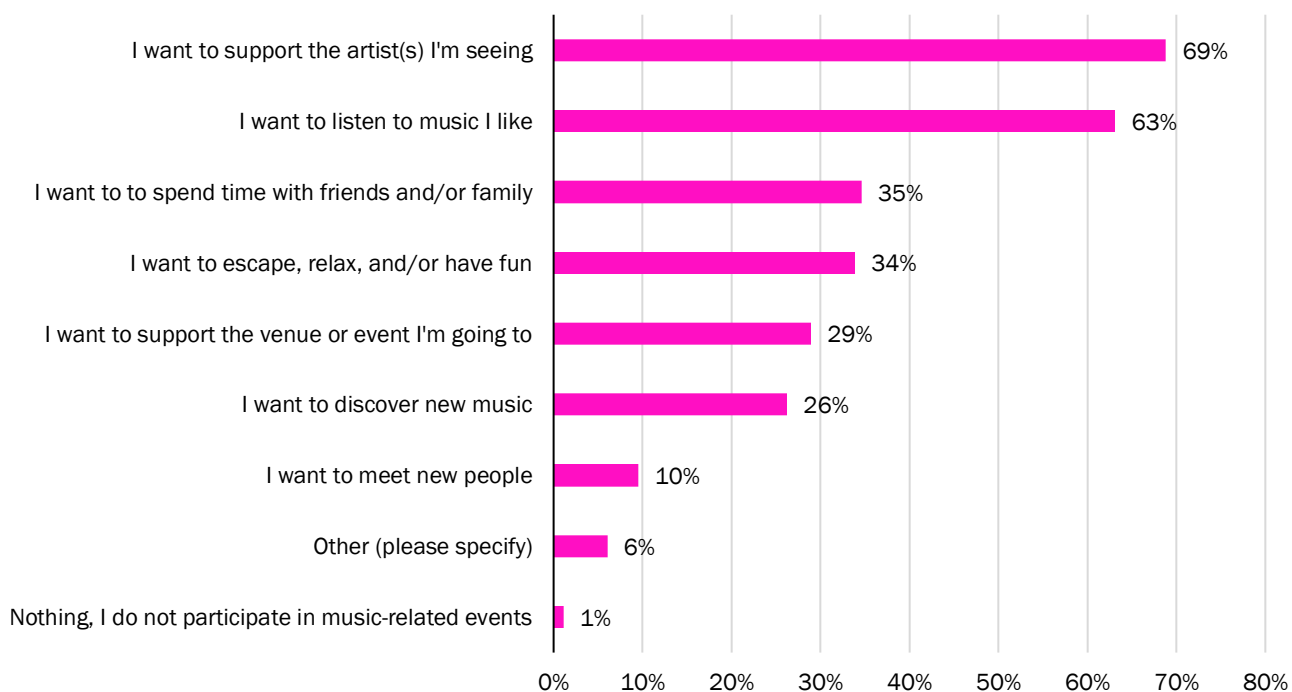


Source: Durham Music Industry Analysis Survey



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)

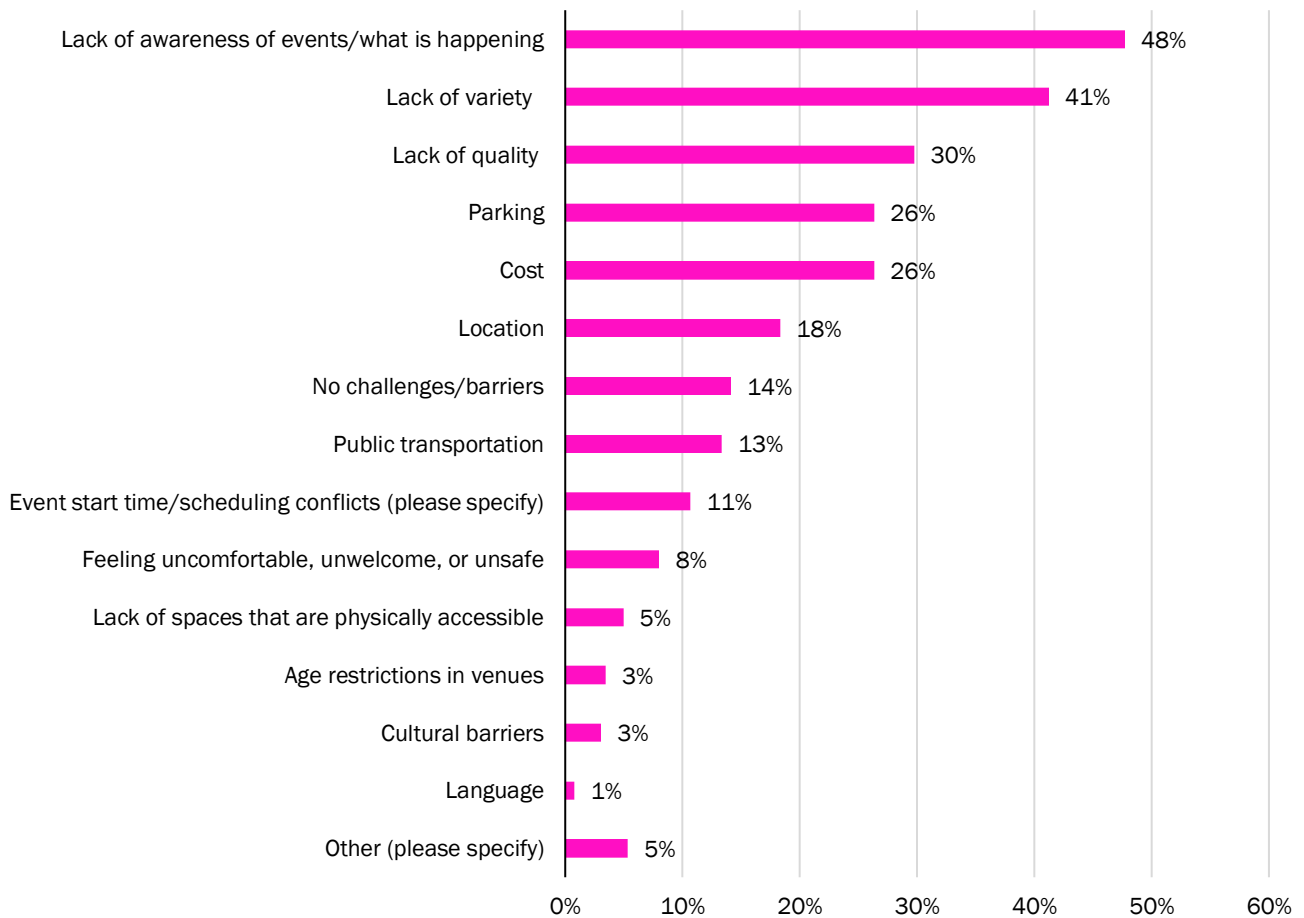


Source: Durham Music Industry Analysis Survey

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)



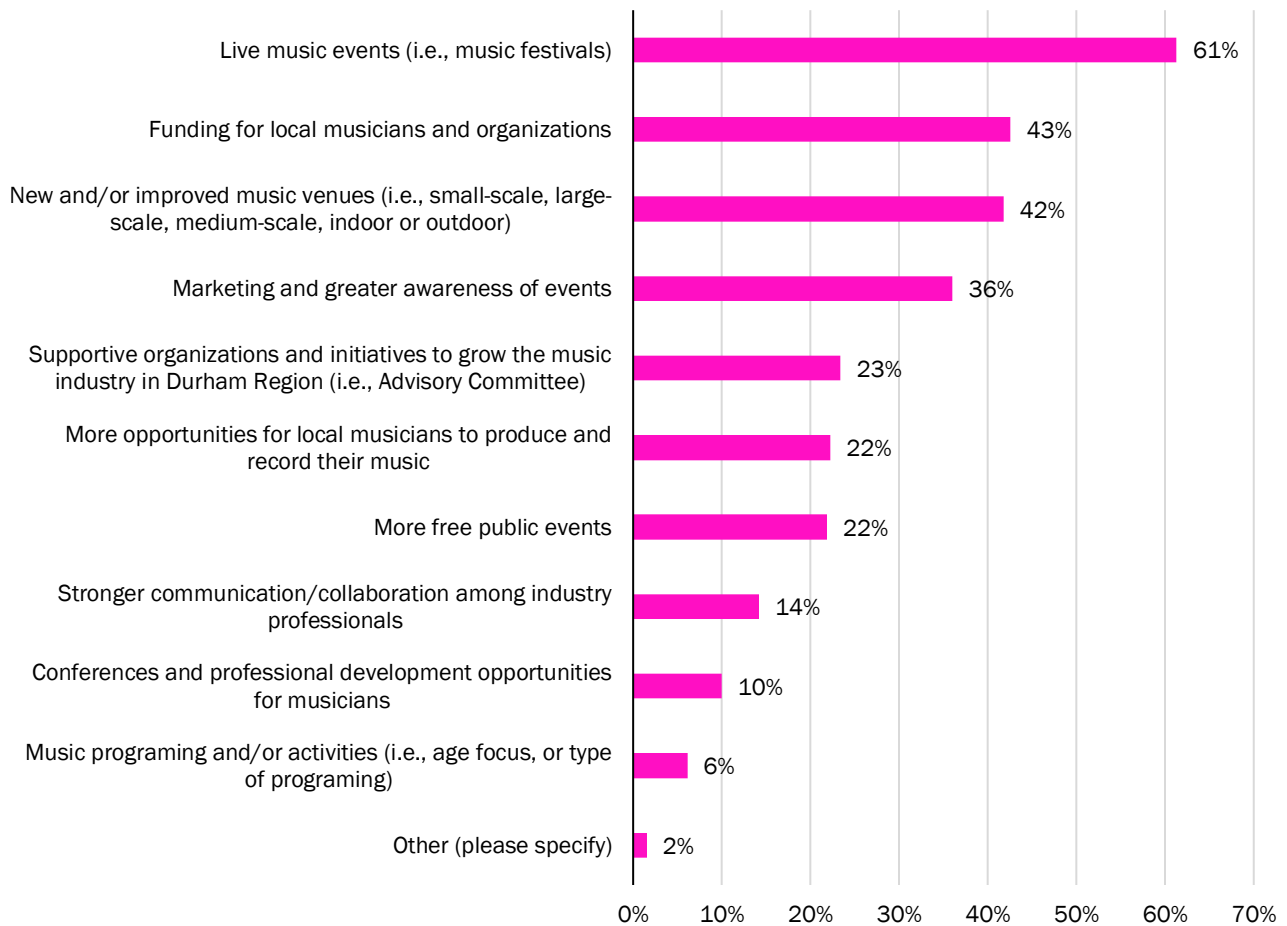
Source: Durham Music Industry Analysis Survey

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 |
| Total | \$96 |

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Resolutions from Advisory Committees

Durham Active Transportation Committee

1. June Bike Month

That we recommend to the Community Growth and Economic Development Committee for approval and subsequent recommendation to Regional Council:

Whereas June is Bike Month;

And whereas Durham Regional Community Growth staff have organized numerous bike friendly activities annually for over a decade to educate residents about cycling safety, promote the benefits of cycling, and encourage residents to bike more by participating in Bike Month throughout the month of June;

And whereas the Durham Active Transportation Committee fully supports the Region of Durham's planned Bike Month activities.

Now therefore be it resolved that the Durham Active Transportation Committee request Regional Council's support of the planned Regional Bike Month activities and proclaim the month of June as Bike Month in the Region of Durham.

Resolutions from Advisory Committees

Durham Agricultural Advisory Committee

1. Toronto and Region Conservation Authority (TRCA) Rural Clean Water Program

That we recommend to the Community Growth and Economic Development Committee for approval and subsequent recommendation to Regional Council:

That Council be advised of the Durham Agricultural Advisory Committee's (DAAC) support of the Toronto and Region Conservation Authority's Rural Clean Water Program, and support of the Region's Community Growth and Economic Development Department exploring the program further.