

Hear and Now:

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



Acknowledgements

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

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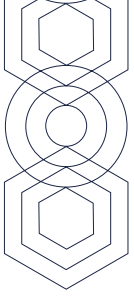
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CANADIAN 
LIVE MUSIC ASSOCIATION **10** YEARS

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

Become a member today.



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



Foreword

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

It's time to change that.

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

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

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

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

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

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

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



Tarun Nayar
Chair - Board of Directors,
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Co-Founder, 5X Festival; Co-Founder,
Snakes x Ladders; Artist



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Canada’s live music industry is an economic powerhouse.

The Results Are In

<p>In 2023 alone, the Canadian live music industry generated \$10.92 billion in gross domestic product (GDP).</p>	<p>Live music in Canada produced \$3.73 billion in tax dollars</p>
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Live music also supported more than **101,640 jobs¹**, contributing **\$5.84 billion** in labour income across the country (**see Table 1**).

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

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

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

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

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

Executive Summary

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

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

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

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

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

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

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

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



(Rauw Alejandro at) Scotiabank Arena

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

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

A Snapshot of Live Music in Canada

Canada's live music industry is vast and varied.

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

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



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

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

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

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

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

Live music is vital to Canada’s social fabric.

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

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

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

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Calls to Action

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

1.

Protect existing venues as the lifeline of the industry.

2.

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

3.

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

4.

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

5.

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

6.

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

7.

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

8.

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

9.

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

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



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