Economic Impact of Ottawa's Music Industry

Prepared for: Ottawa Music Industry Coalition (OMIC)

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Nordicity

Executive Summary

The music industry is an integral part of the cultural fabric of Ottawa. One can find live music across the city, from street corners and coffee shops to outdoor festivals and in large concert halls. Behind the performances, there is a whole industry – managers, technicians, venue operators -- that together contribute to a diverse and dynamic music industry across the National Capital Region.

The music industry in Ottawa has many defining characteristics, which together create a profile of an industry that is dynamic, connected, and in a position for growth.

- Ottawa is home to a **highly active and diverse** music industry;
- The city has a **healthy and growing foundation** of festivals and live music venues;
- It has the **connective infrastructure and support ecosystem** to enable industry growth;
- It has a **small-town feel**, but with **large market access**;
- Ottawa is a **place to build and grow** a music career; and,
- The city is a **bilingual** music market.

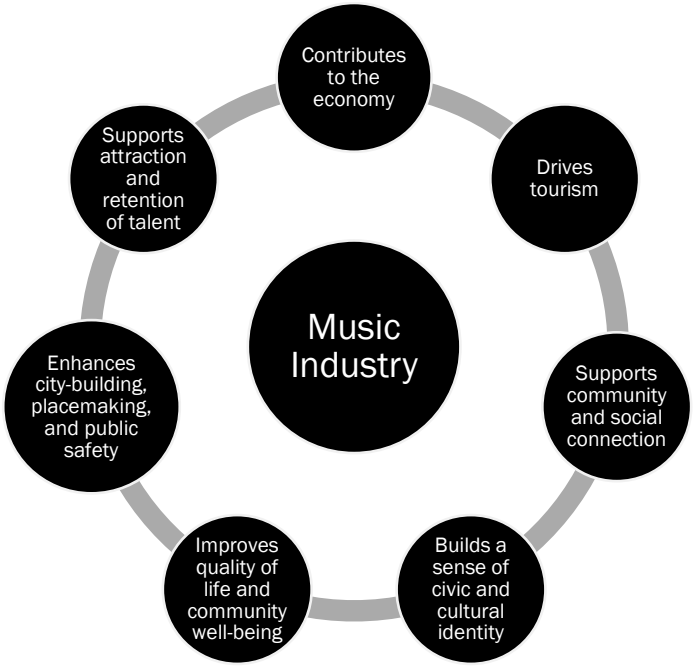
These unique aspects all come together to create a music industry that is not only distinct but also generates economic and social impacts.

The **economic impacts** of Ottawa's music industry can be expressed in terms of gross domestic product, labour income, employment, and fiscal impacts (e.g., taxes). These impacts come from expenditures related to music company operations and tourism, and they are composed of direct, indirect and induced impacts.

Combined, music in Ottawa is estimated to have supported about 2,650 full-time equivalent jobs and contributed an estimated $108 million in labour income, $208 million in GDP, and $61 million in fiscal impacts in 2025.

In addition to the economic benefits, as the Ottawa Music Strategy (2018-2020) recognized,[1] the music industry in Ottawa also creates **social and community impacts**.

Figure 1: Benefits of the Music Industry



The economic and social impacts illustrated in this report indicate that Ottawa's music industry has meaningful assets and activity to build from. Although, there are several opportunities to grow and sustain this activity over time. Ottawa's music industry can sustain and even expand its current impacts by:

- Ensuring there are spaces for people to play and enjoy music.
- Maintaining policies and planning that align with the needs of the industry.
- Supporting a strong talent pipeline.
- Facilitating a connected industry.

[1] City of Ottawa. 2018. "Ottawa Music Strategy 2018-2020."

1. Introduction

Music brings many things to city. It is an outward expression of a city's cultural identity, a community convenor, a tourist attraction, and an economic driver. In Ottawa, music is an integral part of the cultural fabric of the city, performed across the city from street corners and coffee shops to outdoor festivals and in large concert halls. Additionally, there is a whole industry – managers, technicians, venue operators -- behind the performances that together contribute to a diverse and dynamic music industry across the National Capital Region (NCR).[2]

The positive benefits brought by music were formally recognized in the Ottawa Music Strategy (2018-2020)[3] and an initial impact assessment was conducted in 2020. Now six years beyond the strategy, and well beyond the pandemic, it is time to measure the industry's current impacts in a tangible way. As such, the Ottawa Music Industry Coalition (OMIC) engaged Nordicity to assess the economic and social impacts of music in the city. As a non-profit membership organization, OMIC acts as a critical convenor, bringing the

[2] Ottawa, Gatineau and 11 other municipalities in Eastern Ontario and Western Quebec. Government of Canada. www.canada.ca/en/canadian-heritage/services/visitor-information/about.html

[3] City of Ottawa Music Strategy. 2018. "2018-2020 OTTAWA MUSIC STRATEGY"

industry together, and acting as a collective voice. This report provides valuable insights for their work to support the growth and long-term health of the industry in Ottawa.

This report details the benefits of Ottawa's music industry including its economic contributions, comprising its direct, indirect, and induced impacts on Ottawa's economy. It also highlights the tourism and fiscal ripple effects of music activities within the city, and the broader sociocultural outcomes that a vibrant music industry in Ottawa helps to support. Actionable insights are also included, informed by Ottawa's unique context, ensuring that the city's music industry is positioned to thrive within the municipal, regional and national landscape.

1.1. Summary of Methodology

A mixed-method approach was employed to collect and analyze data for this report. These tools and techniques are explained below, along with key assumptions used for the study.

Definition of the Music Industry

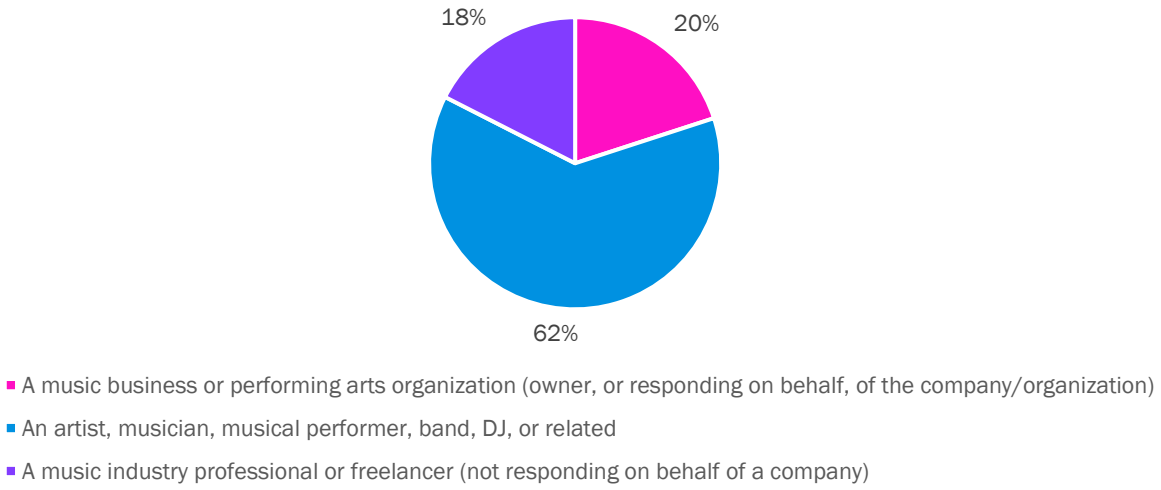
Because the music industry spans a wide range of functions and business types, a clear operational definition is needed. Defining the industry establishes which business, workers, and activities would be included within the scope of analysis. For the purposes of this study, the music industry can be understood as businesses (including for-profit and non-profit) and individuals directly involved in the creation, production, distribution, presentation, promotion, monetization, and teaching of music.

Additionally, a definition of the jurisdiction is also needed. The Ottawa economy is closely interconnected with neighbouring Gatineau; as such, music businesses and workers operate across municipal and provincial boundaries, creating a shared market rather than two separate markets. As a result, this assessment defines the jurisdiction of the Ottawa music industry as the broader National Capital Region to more accurately capture the full scope of music-related activity. Throughout this report, references to the Ottawa music industry are referring to that of the National Capital region, which is comprised of both the City of Ottawa and City of Gatineau.

Industry Survey

The EIA Survey was launched to the Ottawa music industry online on March 3, 2026, and closed on April 2, 2026, as the primary financial data collection tool for this project. In addition, the survey gathered non-financial information to help inform analysis on the strengths and needs of Ottawa's music industry, as well as non-economic impact (including social impacts). The survey was open to all of Ottawa's music industry and was shared widely with the support of OMIC through their social media and email channels. The survey was also promoted via interviews and community engagements. A combined total of 120 complete and usable responses were received. The chart below provides a breakdown of the survey respondent types.

Figure 2: Survey Respondent Breakdown



Engagements

Supplementary to the industry survey, qualitative engagement was undertaken with Ottawa's music industry between March 13 and April 1, 2026. This engagement included three industry roundtables, one conducted in French and two conducted in English, as well as five key informant interviews with local music industry professionals and other relevant interest holders. Invitations were distributed through a contact list developed with the support of OMIC.

Secondary Research

Secondary research was undertaken to situate primary research findings within Ottawa's broader demographic, policy, and industry context. This research included a review of Statistics Canada data; relevant City of Ottawa and provincial policy and planning documents (including the Nightlife Economy Action Plan (2023-2026) and Ottawa Music Strategy (2018-2020)); and wider music industry and music city research from other jurisdictions. Recent reporting on Ottawa's music industry, nightlife, visitor economy, creative economy, and broader municipal planning initiatives was also reviewed where relevant to provide additional context.

EIA Analysis

The economic impacts of music companies' and organizations' operations as well as tourism spending were estimated using primary data collected via the EIA Survey, select secondary research sources, and two economic impact modeling tools. The tools used included Nordicity's proprietary MyEIA™ model, and a customized tourism model informed by MyEIA™ informed by the Government of Ontario's Tourism Regional Economic Impact Model.

A summary of the data sources and analytical tools used are provided in the table below.

Table 1: Data Sources and Analytical Tools Used

Impact Area	Data Sources and Analytical Tools Used
Operations	EIA Survey MyEIA™
Tourism	EIA Survey Statistics Canada National Travel Survey Statistics Canada Visitor Tourism Survey Customized tourism EIA™ model

Nordicity used the D&B Hoovers business directory to estimate the approximate size of the music industry in Ottawa by identifying music-related North American Industry Classification System (NAICS) codes and generating lists of registered businesses on both the Ontario side (Ottawa) and the Quebec side (Gatineau) of the industry. Nordicity estimates the Ottawa music industry is home to 279 music assets (defined as registered music-related businesses).

As described above, the Ottawa music industry operates across jurisdictions. Therefore, **measures were taken to avoid double-counting economic activity that occurs across the Ontario-Quebec border**. Measures included collecting data via the survey that allowed Nordicity to estimate the proportion of a company's labour and non-labour expenses spent in the company's home province and outside the home province (with specific data collected for Ontario and Quebec spending). Total expense estimates for both Ontario and Quebec companies were corrected using those data points.

Additional details on EIA analysis methodology can be found in Appendix A.

2. Profile of Music in Ottawa

Through conversations with the industry, a picture emerged about how Ottawa's music scene is understood by those currently working in it. Music in Ottawa has many defining characteristics, which together create a profile of an industry that is dynamic, connected, and in a position for growth.

Ottawa is home to a highly active and diverse music industry

A recurring theme in consultations was that Ottawa's music activity is broader and more diverse than the city's external identity tends to convey. Participants offered that they often feel that the city's external identity is shaped by its role as the seat of federal government, with people referring to "Ottawa" as a political entity rather than as the vibrant, diverse city that it is. However, Ottawa's music ecosystem has developed considerable depth across festivals, live music venues, recording and label operations, grassroots scenes, education and training, and community-based activity. As of the 2021 census, the City of Ottawa has 5,800 professional artists, which represents 1.0% of the city's labour force. Of those professional artists, the highest proportion (22%, or 1,300 individuals) are musicians, which exceeds the Ontario average of 18%.[4]

Within this ecosystem, consultation participants noted that local music activity is not concentrated in a single sound or scene. Rather, it is carried by active pockets of genre-based activity that draw upon its cultural diversity, including hip-hop, hyper-pop, Afrobeats, garage rock, and experimental music. These

[4] Hill Strategies. 2024. "Most Ottawa artists earn less than a living wage, despite very high education levels."

pockets of subculture are often built through informal networks of artists, organizers, venues, and audiences. Shows and venues often act as informal "third spaces," creating points of connection and belonging in a city where consultations suggested that grassroots music activity can sometimes feel dispersed and difficult to see. In this sense, local music is one of the ways Ottawa's diversity is expressed, particularly among newcomers, racialized communities, Francophone communities, and Indigenous artists – including the largest urban Inuit population in Canada.[5] For these communities, music becomes a way of carrying identity, language, memory, and belonging into the public sphere.

Ottawa has a healthy and growing foundation of festivals and live music venues

Consultation participants pointed to recent and ongoing progress in growing Ottawa's base of music venues and filling out the city's "venue ladder."[6] Based on a scan of businesses classified under relevant music-related NAICS codes, Ottawa has **an estimated 56 live music venues**. While mid-sized rooms (500 to 1000-person capacity) remain a noted gap, participants celebrated recent progress in building and retaining small- and large-sized rooms – from LIVE! On Elgin (70-person capacity) and Red Bird (80-person capacity) to the recent Hard Rock LIVE (1900 to 2200-person capacity) and the forthcoming History Ottawa (2000-person capacity). A diversity of differently sized rooms gives local artists more room to grow within their own market while improving Ottawa's ability to attract touring acts. Participants also emphasized how they observe live music venues supporting street-level vibrancy by drawing people downtown and helping to animate public spaces like the ByWard Market and Metcalfe Plaza. This activity helps generate traffic for nearby restaurants and businesses while reinforcing live music as part of Ottawa's visitor economy.

> *"The restaurant next door is fully booked whenever we have a show."*

The city's festival base was also cited by engagement participants as especially significant from a public-facing perspective, ranging from generational staples like Ottawa Bluesfest, Ottawa Jazzfest, CityFolk, and Ottawa Chamberfest, to newer entrants like Escapade Cranium Festival and Pique (Debaser). These festivals and events help to anchor Ottawa's live music calendar and draw visitors into the region, with Destination Canada referring to Ottawa as "a festival town."[7] Consultations pointed to a healthy culture of annual festival attendance among Ottawans, calling them a "great excuse" for folks to spend time with friends and family on an annual basis – including people that may be returning home for a visit timed around a festival.

Ottawa has the connective infrastructure and support ecosystem to enable industry growth

Ottawa's music industry benefits from coordinating assets that are notable for a market of its size. At the centre is OMIC, which engagement participants repeatedly described as the industry's most important connector. This role matters because Ottawa's music community is broad enough to form natural silos (e.g., across genres or professional networks), but not always large enough for those silos to function effectively

[5] National Observer. 2022. "Urban Indigenous populations continue to grow: 2021 census."

[6] The "venue ladder" refers to a balanced mix of small, mid-sized, and large live music venues, from coffee houses to arenas, that provide artists with appropriate places to perform at different stages of career development.

[7] Destination Canada. "Ottawa: A Festival Town."

on their own. OMIC helps bridge those gaps by creating opportunities for artists, music workers, venues, festivals, music businesses, and civic partners to share information and build a more coherent sense of the music industry as a whole. Consulted interest holders pointed to OMIC's member meetups and other networking events, as well as professional development workshops and mentorship supports (both formal and informal) as important tools for making the local industry more visible and accessible. OMIC's role as a connector was also noted as extending beyond Ottawa. By bringing external industry players into the city and maintaining relationships with music offices and industry partners elsewhere, OMIC helps local artists and music businesses build outward-facing industry connections without always requiring them to leave the region to access them.

> *"Their [OMIC's] work is essential in terms of coordinating the industry and pulling disparate communities together."*

OMIC's work is also supported by a visible layer of municipal planning and institutional advocacy. The development and implementation of the City's Music Strategy (2018-2020) and Nightlife Economy Action Plan (2023-2026), together with the appointment of a Nightlife Commissioner, point to a sustained effort to treat music and nightlife as part of Ottawa's economic development agenda and a key driver of urban vitality. The Nightlife Commissioner Office, with support and guidance from the Ottawa Nightlife Council, functions as the lead authority for implementing the Nightlife Economy Action Plan and cultivating "a more vibrant, diverse, inclusive, viable, safe, and well-managed nightlife across the city."[8] Ottawa Festival Network adds another coordinating layer for the city's festival ecosystem. Ottawa has been home to the Canadian Live Music Association (CLMA) for the last ten years, affording the city a national industry advocacy presence. While engagement participants indicated that there is still room to improve coordination across the industry, these ingredients provide a foundation from which to build a more connected music industry in Ottawa.

Ottawa has a small-town feel, but with large market access

Ottawa benefits from what consultation participants described as a "warm, loyal market," where artists and music workers can build their careers without the same barriers to entry often associated with larger centres. While Ottawa may not have the level of industry and artist services (e.g., publicists, major labels) as larger markets have to offer, consultations offered that Ottawa's location gives artists and music businesses reasonable access to Toronto and Montreal without forcing them to relocate. Locals will still travel to these larger industry hubs for specific opportunities and meetings, but they will do so while maintaining their home base in Ottawa because they value the quality of life, lower cost of living, and closer-knit ecosystem where "everybody knows each other." Participants noted that this balance has become more viable as remote collaboration and online audience development have reduced the need to maintain a constant physical presence in major markets. Aside from Toronto and Montreal, Ottawa's location also affords local artists and technicians access to a corridor of multiple smaller markets within a reasonable driving distance.

[8] City of Ottawa. "Nightlife Economy Action Plan 2023-2026."

> *"Ottawa is a great place to live if you want stability [and] balance… A great place to pursue your passion and have a comfortable life."*

Ottawa's position as the national capital also affords another layer to this dynamic, especially in the way it shapes the scale and composition of its visitor economy. Consultation participants observed that the city attracts a wide diversity of visitors, with many conferences and government-adjacent events that create recurring work for musicians and, especially, technicians. Participants also noted that the city's diplomatic presence, including embassies and cultural attachés, can sometimes put local artists and organizations in closer contact with global networks and potential export opportunities. Together these factors give Ottawa a unique market context, allowing artists to grow in a smaller pond while remaining close to the regional and international networks that may help them reach beyond it.

Ottawa is a place to build and grow a music career

Ottawa offers a constructive environment for artists and music workers to learn their craft and build experience at a more sustainable pace than they may find in larger music markets. Consultation participants pointed to formal and informal training opportunities through festivals, local venues, local studios, and OMIC itself as key entry points for early-career music workers and keen volunteers. Algonquin College's Music Industry Arts program was also noted as having played a crucial role in the local labour pipeline, making its forthcoming loss a going concern for the industry.

Consultation participants also noted that while the idea of a "hobbyist" or "part-time musician" has often carried a dismissive meaning in the industry, this distinction feels less relevant in Ottawa, where many artists pursue their passion while maintaining stable employment that allows them to self-fund their projects. This creates a different kind of career pathway, where artists and music workers can keep creating high-quality work without the same make-or-break commercial pressure sometimes found in larger markets.

Ottawa is a bilingual music market

Ottawa's dual-lingual profile, paired with its position straddling Ontario and Quebec, represents one of the region's most distinctive market conditions. In the Ottawa-Gatineau census metropolitan area (CMA), 24% of residents speak French most often at home, with more than half able to speak French.[9] While the music scene is shaped by many cultures and communities, as is the case in many large Canadian cities, participants noted that Ottawa stands out for the extent to which Anglophone and Francophone cultural life coexist within the same regional market.

> *"Ottawa is a legitimately bilingual cultural city, not merely an Anglophone one with Francophone exceptions."*

Consultations emphasized bilingualism as central to Ottawa's music identity, while also noting that the two language markets do not always connect easily. Although some participants noted a perception that

[9] Statistics Canada. 2021. "Census Profile, 2021 Census of Population: Ottawa-Gatineau."

Francophone music can still feel like it sits somewhat apart from Ottawa's wider music scene, this dual-market context still creates a unique opportunity for Francophone artists and music workers to grow within Anglophone, Franco-Ontarian, Quebec, and international Francophone networks. The region also sits between Ontario's largely English-language industry and Quebec's Francophone music ecosystem, affording artists and organizations proximity and access to both markets.

2.1. Financial Profile

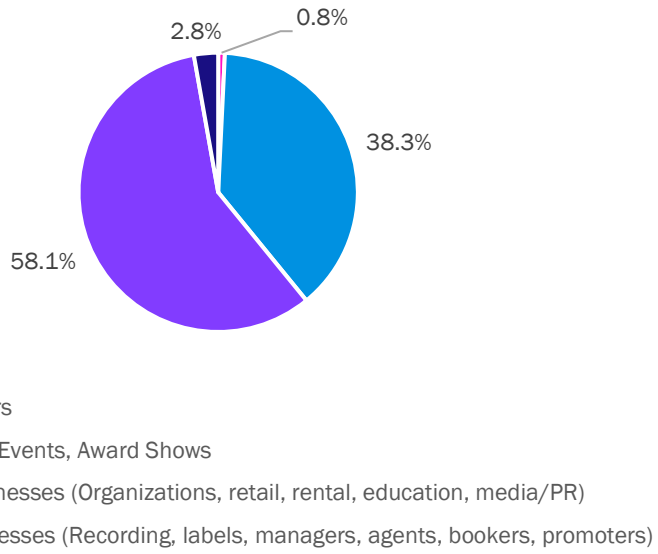
In addition to being dynamic, connected, and in a position for growth, the music industry is an economic driver, generating revenue and contributing to labour in the region. This section outlines a financial profile of the music industry in Ottawa, highlighting its revenue, expense patterns, and certain labour dynamics. Examining these three distinct elements will help illustrate the financial and workforce environment that informs the industry's broader economic impacts.

Revenue

Through extrapolating the data gathered in the survey, Nordicity estimates that music companies (including for-profit and non-profit) in Ottawa earned a total of **$177 million of revenue** in 2025. This total is made up of revenue from four different segments, with public-facing businesses (including music organizations, music retail & rental, music education, music media/PR) accounting for approximately 58% and venues, festivals, events, and award shows accounting for about 38%. This data implies that a company's revenue potential depends on its type, and that not all companies have the same earning potential.

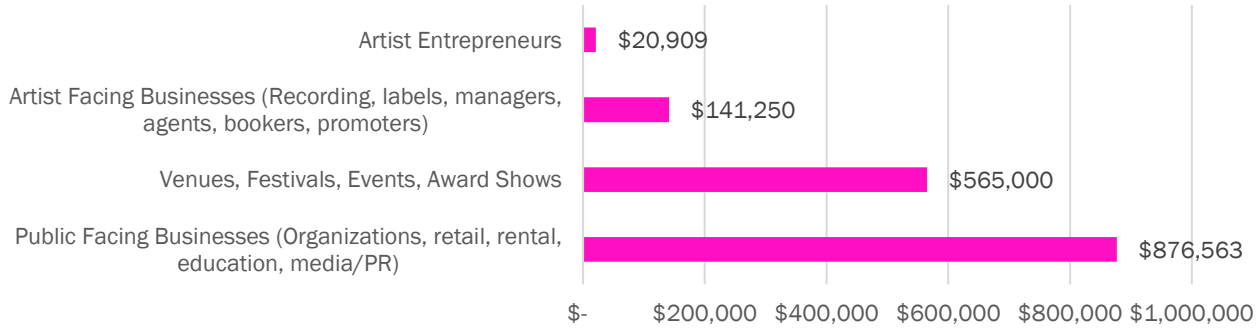
The chart below provides a visual representation of how the different music company types in Ottawa contributed to the industry's 2025 revenue.

Figure 3: Music Industry Revenue Breakdown, by Segment



In 2025, public-facing music businesses had the highest average revenue of $876,563, while artist entrepreneurs had the lowest average revenue of $20,909. The chart below provides a visual representation of average annual 2025 revenue for the various segments of music businesses Ottawa.

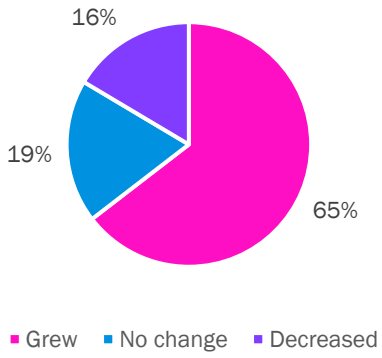
Figure 4: Average Annual Revenue, by Segment



There has been variation in revenue levels between 2025 and the previous year. Approximately 65% of businesses saw growth in revenue between 2024 and 2025, an indication of a resilient industry that has re-established services and operations following years of disruption.

The chart below shows how the revenue of music companies in Ottawa changed between 2024 and 2025. This growth can be attributed to many factors but is likely (at least partially) to be the result of continued re-building in post-pandemic years, as well as inflation, considering Canada's Consumer Price Index (CPI) rose 2.1% in 2025.[10]

Figure 5: Ottawa Music Business Revenue Change, 2024 to 2025



Generally, these revenue growth predictions may indicate rebounding consumer demand in the music industry. The global trend of consumers prioritizing experiences and entertainment over other expenses is likely a contributor to the improving consumer demand[11]. However, revenue increases might reflect

[10] Statistics Canada. 2026. "Consumer Price Index: Annual review, 2025."

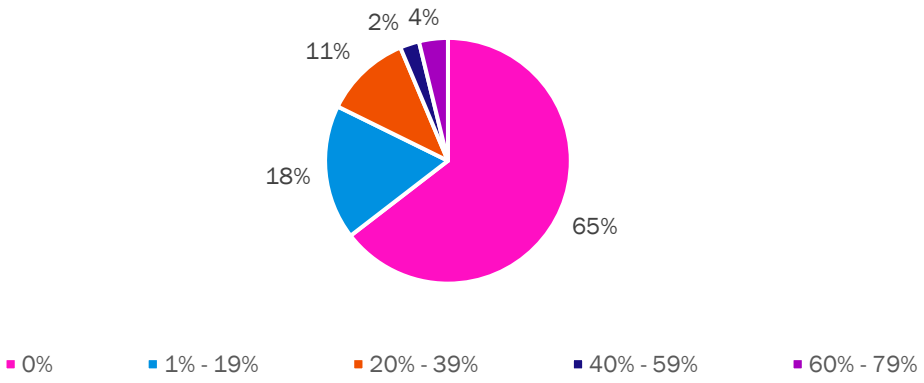
[11] Bloomberg. 2024. "Sports and Music Tourism Will Soon Represent a $1.5 Trillion Economy."

business' need to adjust their pricing to cover higher operations costs as a result of high inflation rates in recent years. Inflation can also lead to higher selectivity on the consumer side, which could lead to revenue fluctuations in the future. Businesses in the industry may need to explore new strategies to offset financial pressures which can lessen consumer enthusiasm.

Finally, survey results indicate that the majority (65%) of music businesses in Ottawa do not receive any of their revenue from public funding sources, and 18% of businesses receive less than 20% of their revenue from public funding sources.

The chart below summarizes the proportion of business revenue received from public funding.

Figure 6: Portion of Ottawa Music Business' Revenue from Public Funding

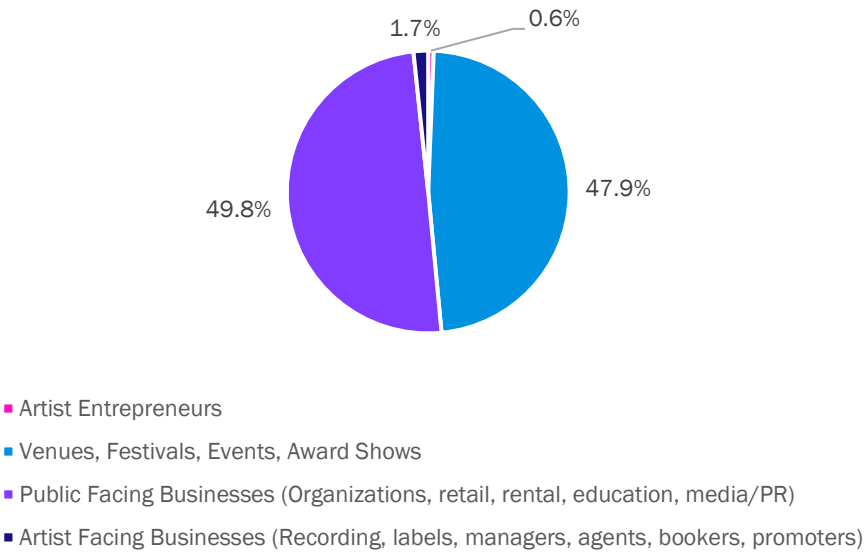


Expenses

Nordicity estimates that Ottawa music companies (including for-profit and non-profit) **spent a total of $138 million in 2025**. Expenses from public-facing businesses (including music organizations, music retail & rental, music education, and music media and PR) together accounted for the largest share, at approximately 50%, while artist entrepreneurs accounted for the smallest share, at less than 1%. A business' operational expenses depend on the type of business it is, and not all companies should or need to spend the same amount. For example, it costs more to run a festival or operate a venue than it does to run a live music management firm.

The chart below provides a visual representation of how different music business types in Ottawa contributed to the industry's total 2025 expenditures.

Figure 7: Ottawa Music Industry Expenses by Business Type



The nature of companies' or organizations' annual expenditures vary depending on type. The largest share of 2025 music business expenses in Ottawa went to employee wages in each segment. For artist entrepreneurs, the next largest expense categories were marketing and travel; for venues, festivals, events, and award shows, programming costs and bar and restaurant costs; for public facing businesses, programming and other costs; for artist facing businesses, programming costs and rent. The table below provides a breakdown of total 2025 expenses by category.

Table 2: Breakdown of Expenses by Category

Expense Category	Artist Entrepreneurs	Venues, Festivals, Events, Award Shows	Public Facing Businesses	Artist Facing Businesses
Canada-based labour	37.8%	35.1%	56.4%	37%
Rent	6.5%	8.0%	4.7%	15%
Utilities	2.7%	1.8%	0.6%	1%
Marketing	9.8%	3.9%	3.0%	5%
Travel	8.1%	0.9%	1.1%	4%
Accommodation	3.6%	1.4%		3%
Insurance	1.6%	2.7%	1.1%	3%
Tech purchase	7.6%	1.6%	0.3%	2%
Tech rental	3.2%	0.9%		
Licensing (e.g. SOCAN)	0.4%	1.1%		

Facility maintenance	0.1%	2.0%	0.7%	
Ticketing	0.4%	0.5%		
Bar and restaurant costs	2.2%	9.4%		2%
Artist development	4.5%	1.2%	5.5%	1%
Programming costs (e.g., artistic fees)	2.6%	17.3%		23%
Event costs	2.8%	5.4%	1.7%	
Computer services	2.0%	1.1%	0.5%	1%
Professional services	2.3%	1.8%	2.4%	1%
Construction		0.3%		
Other expenses	1.7%	3.6%	6.8%	

Labour

Labour represents the largest expense item in total expenditures (as discussed above) and is therefore an important driver of economic activity for the Ottawa music industry. In 2025, it is estimated that the average salary for a full-time music worker in the Ottawa music industry is approximately $31,000.

According to Statistics Canada, the average Canadian income in 2025 was $61,000 with a median income of $46,300[12], both of which are higher than the estimated average salary for a full-time worker in the National Capital Region's music industry. This finding implies that Ottawa music workers earn a lower salary than the average worker in Canada. Indeed, this salary level falls under the official Canadian poverty threshold[13], implying that many full-time music workers in Ottawa may be living in poverty.

[12] Statistics Canada. 2026. "Income of individuals by age group, sex and income source, Canada, provinces and selected census metropolitan areas."

[13] Statistics Canada. 2022."Canada's Official Poverty Line."

3. Impacts of Music in Ottawa

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

Combined, music in Ottawa is estimated to have supported about 2,650 full-time equivalent jobs and contributed an estimated $108 million in labour income, $208 million in GDP, and $61 million in fiscal impacts in 2025.

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

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

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

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

The sum of the direct, indirect, and induced economic impacts is the total economic impact. The table below summarizes the economic impacts of the music industry in Ottawa.

Table 3: Summary of Economic and Fiscal Impacts of Music in the National Capital Region

Impact Type	Operations	Tourism	Total
Employment (FTEs)	2,450	200	2,650
Labour Income	$95,240,000	$12,795,000	$108,035,000
GDP	$184,087,000	$23,740,000	$207,827,000
Fiscal Impacts	$52,231,000	$9,055,000	$61,286,000

The subsections below detail the economic and fiscal impacts of Ottawa's music company operations and tourism spending.

3.1. Economic Impact – Operations

As discussed above, music companies in Ottawa spent an estimated total of $138 million 2025; the total GDP impact of this expenditure is an estimated $184 million. Other economic impacts of music company operations are summarized in the table below.

Table 4: Economic Impact of Music Business Operations

	Direct Impact	Indirect Impact	Induced Impact	**Total Impact**
Employment (FTEs)	1,790	450	210	**2,450**
Labour Income	$54,951,000	$24,996,000	$15,293,000	**$95,240,000**
GDP	$111,378,000	$40,783,000	$31,926,000	**$184,087,000**

The total labour income impact of music company operations in Ottawa was an estimated $95 million, and the total employment supported by these operations is an estimated 2,450 FTEs. Music company operations directly employ 1,790 FTEs and support 660 indirect and induced FTEs.

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

Table 5: Fiscal Impacts of Music Business Operations

	Federal	Provincial	**Total**
Personal Income Taxes	$13,897,000	$9,357,000	**$23,254,000**
Corporation Income Taxes	$5,147,000	$5,554,000	**$10,701,000**
Consumption Taxes	$4,242,000	$7,582,000	**$11,824,000**
Local Property Taxes, Other Fees	$ -	$6,452,000	**$6,452,000**
Total	$23,286,000	$28,945,000	**$52,231,000**

Music companies contribute to tax revenue at the federal and provincial levels. Personal income taxes, corporation income taxes, consumption taxes, local property taxes, and other fees together contributed an estimated $23 million at the federal level and $29 million at the provincial level, yielding an estimated $52 million in total fiscal impact in 2025.

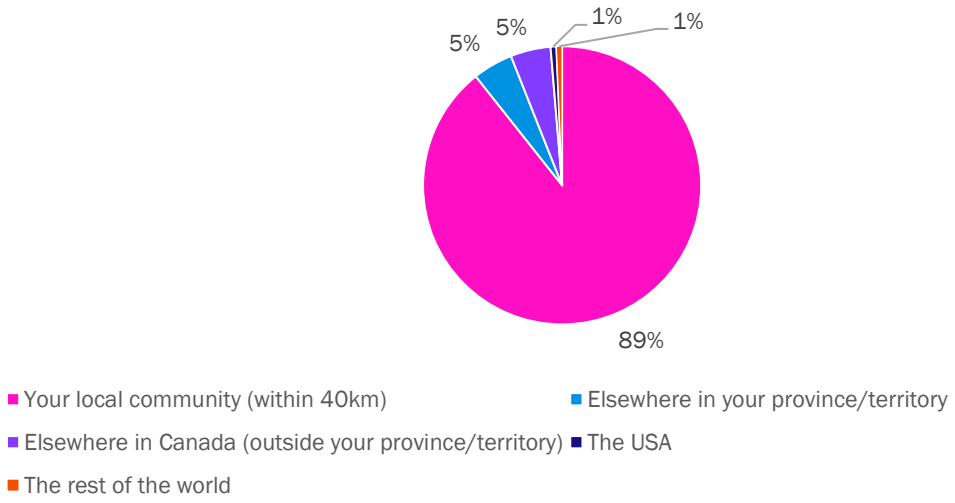
3.2. Economic Impact – Tourism

Music in Ottawa is a driver of tourism, and visitor spending associated with music tourism generates economic impacts. Tourists spend money and therefore generate economic impact that would otherwise not occur in a given jurisdiction. Visitors from Ottawa's immediate area (for the purposes of this analysis, defined as within 40 km) are classified as local and therefore not considered in calculations for tourism spending; however, visitors from beyond the local area are classified as non-local, and are therefore considered in calculations.

Non-local visitors fall into four categories: those from outside Ottawa but within the province, those from within Canada but outside the province, those from the United States, and those from outside of both Canada and the United States.

The figure below provides a summary of where Ottawa music event attendees travel from.

Figure 8: Estimated Ottawa Music Visitor Provenance



The majority (89%) of people who attend music events do so within their local community, and 11% travel from outside of their local community to do so. Of that 11% who travel to music events, the majority travel within their own province or from within Canada. An estimated 2% of attendees at music events in Ottawa travelled internationally to do so.

In 2025, it is estimated that music festivals and live shows in Ottawa together saw approximately 424,000 visitors; approximately 45,000 of those visitors were non-local (i.e., from further than 40 km away, as described above). These **non-local visitors are estimated to have spent over $29.2 million in Ottawa**.

The estimated total GDP impact of this tourism spending is $24 million. Other economic impacts of music related tourism spending are summarized in the table below.

Table 6: Economic Impacts of Visitor Spending

	Direct Impact	Indirect Impact	Induced Impact	**Total Impact**
Employment (FTEs)	100	60	40	**200**
Labour Income	$5,869,000	$4,395,000	$2,531,000	**$12,795,000**
GDP	$9,777,000	$8,685,000	$5,278,000	**$23,740,000**

The total labour income impact of music related tourism spending in Ottawa was an estimated $13 million, and the total employment supported is an estimated 200 FTEs. Music related tourism spending directly employs 100 FTEs, and supports 100 indirect and induced FTEs.

Music related tourism spending also contributed over $9 million in total fiscal impacts, as summarized in the table below.

Table 7: Fiscal Impacts of Visitor Spending

	Federal	Provincial	**Total**
Personal Income Taxes	$1,866,000	$1,165,000	$3,031,000
Corporation Income Taxes	$634,000	$728,000	$1,362,000
Consumption Taxes	$1,509,000	$2,306,000	$3,815,000
Local Property Taxes, Other Fees	$ -	$847,000	$847,000
Total	$4,009,000	$5,046,000	$9,055,000

While the current geopolitical climate and relations with the United States may continue to impact overall tourism, both domestic and international tourism in Canada is projected to increase between now and 2030.[14] It is therefore reasonable to posit that tourism spending in Ottawa attributable to music will increase in the coming years, as will the corresponding economic and fiscal impacts.

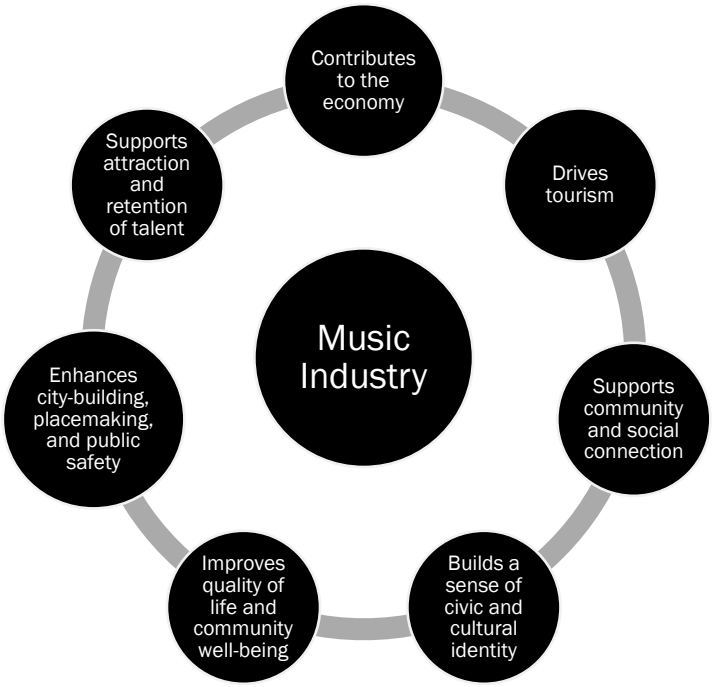
3.3. Social and Community Benefits

The benefits of music extend well beyond its direct economic impact. Building on the profile findings in Section 2, this section considers the broader social and community benefits associated with Ottawa's music industry. These findings draw on both engagement input and secondary research, and are consistent with wider literature on music cities, including Music Canada's report, "The Mastering of a Music City."[15]

[14] Canadian Tourism Data Collective. Destination Canada Tourism Outlook 2025. Destination Canada Tourism Outlook 2025-2030.

[15] Music Canada. 2015. "The Mastering of a Music City: Key Elements, Effective Strategies, and Why It's Worth Pursuing."

Figure 9: Benefits of the Music Industry



As the Ottawa Music Strategy (2018-2020) recognized,[16] the music industry in Ottawa can be a powerful force in generating tangible civic benefits. Music gives Ottawa a more visible sense of urban energy, helping to enhance **city brand-building** by countering the perception that the city is defined mainly by government and administration. It also functions as a **placemaking** tool, helping to animate downtown streets and make public spaces more welcoming for community to congregate. Consultation participants echoed this idea locally, offering that spaces like ByWard Market and Metcalfe Plaza have been notable successes where music has enhanced the visitor experience and created real "spots" for people to spend time.

By making neighbourhoods more attractive and interesting places to live, work, and visit, music helps make the case for Ottawa as a city where people want to stay and build a life. Furthermore, when music draws more people into dense urban areas in Ottawa, it supports actual and perceived **public safety** by putting more 'eyes on the street'; participants remarked at how visible activity around live music venues often beget more activity, which make people feel more comfortable staying out. These effects connect directly to Ottawa's stated goals around **downtown development**,[17] while also enhancing the quality of life offer that helps **attract and retain talent and investment** across the wider economy.

Beyond these civic benefits, music supports the less visible social fabric of the city. Consultation participants described music scenes as crucial "third spaces" that drive **social cohesion**, with live music venues and dance floors helping people form social connections and "find their people," especially young people and newcomers. Music also provides a public channel for expressing the diversity of culture that

[16] City of Ottawa. 2018. "Ottawa Music Strategy 2018-2020."

[17] Ottawa Board of Trade. 2024. "A Living Capital: Investing in Downtown Ottawa for a Dynamic Future."

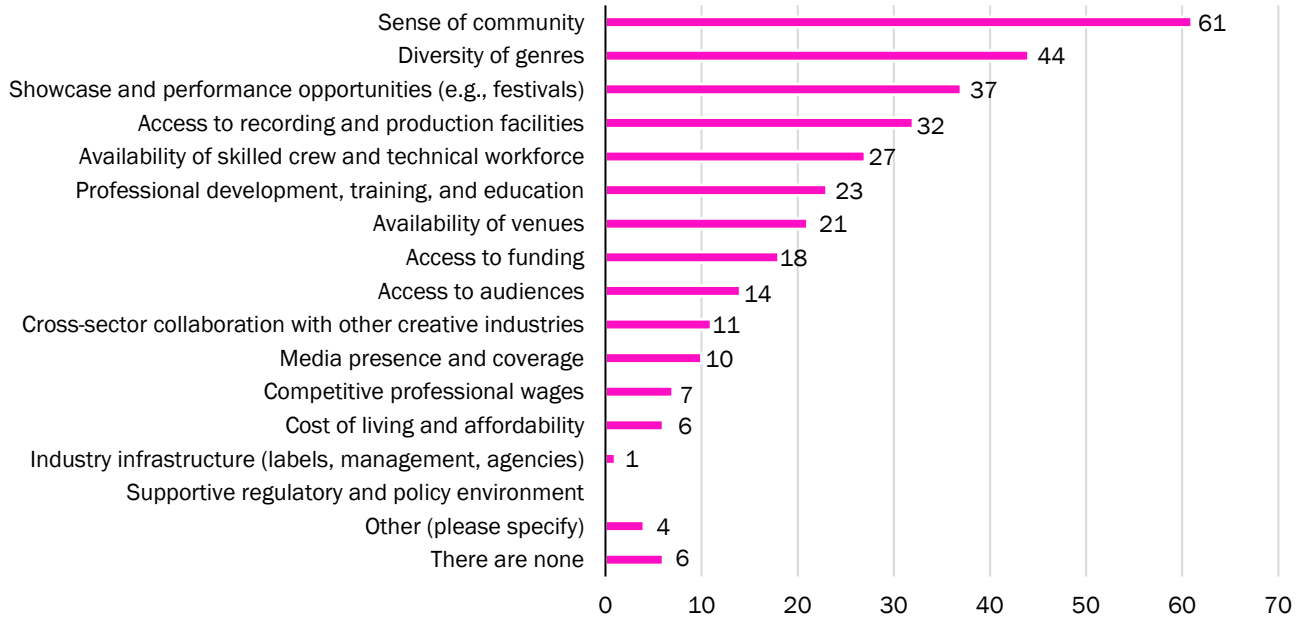
defines Ottawa, allowing communities to express language, memory, and lived experience in ways that build a sense of **shared identity**. Participants also described the value of music in terms of **mental health**, citing its therapeutic capacity to elicit emotion and vulnerability. Some referred to music as “social medicine,” particularly in relation to combatting youth isolation and the pull of screen-heavy routines. Others pointed to its therapeutic value in settings such as Ottawa’s retirement homes, where music can create moments of emotional connection for residents.

4. Where Ottawa Can Go from Here

Ottawa's music industry already has meaningful assets and activity to build from. This section turns to what may be needed to grow and sustain that activity over time, drawing on needs and opportunities that emerged through consultations. The following findings should not be read as a strategic roadmap on their own, but they may help to inform future work on music industry development in Ottawa.

The survey results below help set the context for this discussion. Respondents were first asked to identify up to five strengths of Ottawa's music industry. As shown in Figure 10, the most selected strengths were the sense of community, diversity of genres, and performance opportunities, with other options related to availability of infrastructure and labour also scoring highly. These results reinforce many of the themes raised through consultations, where the industry was described as creatively diverse, community-minded, and supported by meaningful performance and production assets (as discussed in Section 2).

Figure 10: What are the strongest aspects of Ottawa's music industry? (choose up to five)



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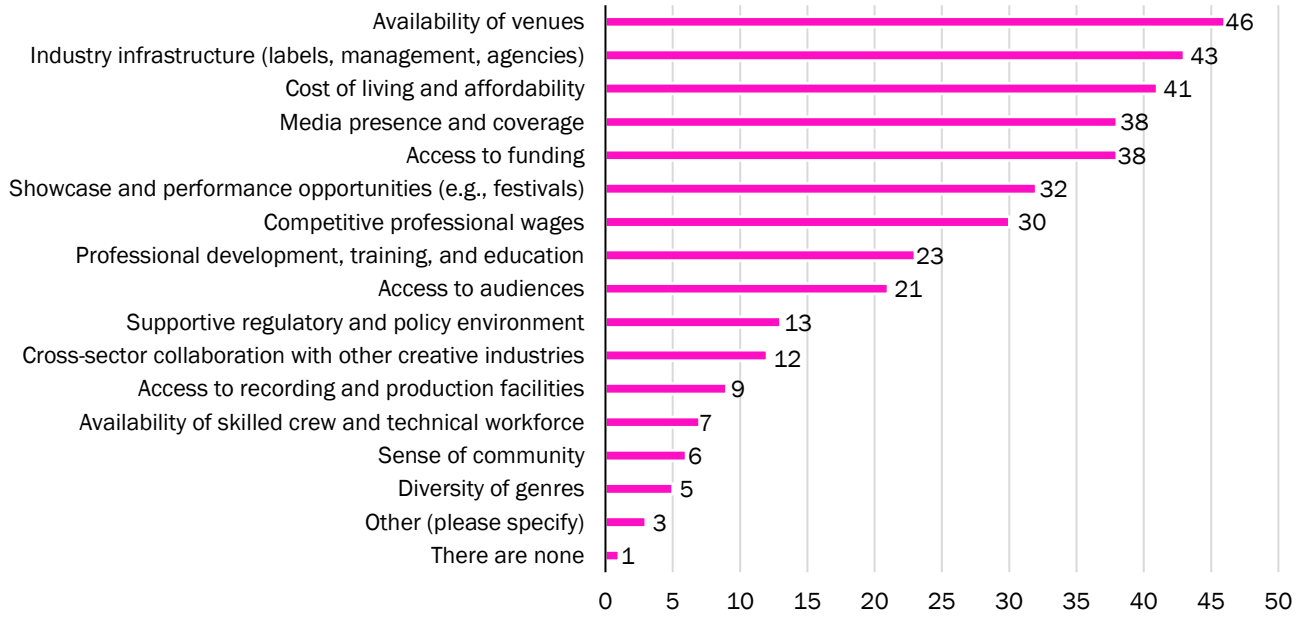
Respondents were then asked to select up to five challenges facing Ottawa's music industry. As shown in Figure 11, the most selected challenges were availability of venues, industry infrastructure and presence (e.g., labels, management, agents), cost of living and affordability, music media presence and coverage, and availability of funding.

Figure 11: What are the biggest challenges in Ottawa's music industry? (choose up to five)



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The sections that follow explore many of these key issues in greater depth, drawing on consultation findings and secondary research to consider how Ottawa could leverage its strengths and address the key challenges identified above. They focus on four areas where further attention could help to grow and sustain Ottawa's music industry: supporting music spaces, driving policy alignment, sustaining career pathways, and building a more connected industry.

4.1. Supporting the Spaces Where Music Happens

Live music venues are the backbone of any local music scene. However, venues across Canada are operating in increasingly difficult conditions: rising commercial rents and urban development pressures, higher insurance costs, shrinking alcohol sales, increased fees for touring artists, and greater competition for entertainment dollars are placing greater pressure on already thin margins.[18] A 2024 UK Music Venue Trust report found that the average grassroots music venue had a profit margin of about 0.5%,[19] and those same pressures are being felt in Ottawa. Citing these persistent challenges, participants emphasized throughout consultations that the ongoing health of Ottawa's live music venues represents one of the most significant risks to sustaining the local music scene.

[18] Bloomberg. 2025. "A wave of venue closures fears for Canada's live music scene."

[19] Music Venue Trust. 2023. "Annual Report 2023."

Recent and forthcoming venue additions, such as Hard Rock LIVE and History Ottawa, were identified as helping to strengthen parts of the local venue ladder, but gaps remain, particularly among mid-sized rooms (500 to 1000-person capacity).[20] Participants also emphasized that existing venues would benefit from more dedicated supports. Public and institutional venues were identified as essential parts of Ottawa's music landscape, but participants noted that privately owned grassroots venues are exposed to a different set of financial pressures and may require more targeted support to remain viable. In privately owned venues, accessibility was raised as a particular challenge; many older venues require substantial and costly structural upgrades in order to meet AODA standards, which venue owners often cannot afford on the tight margins on which they operate. Consultations also highlighted the opportunity for greater integration of live music venues outside of the downtown core (including all-ages shows), particularly as a way to build stronger connections with suburban audiences.

Meanwhile, festivals were described in consultations as the "crown jewel" of Ottawa's music scene and the city's tourism offer, and there is an opportunity to build further on this strength by improving the availability and coordination of festival spaces. Consultation findings pointed to a need for more festival sites, particularly for newer entrants trying to grow. Participants also cited opportunities for the City, National Capital Commission[21], and other public landholders to work together to reduce barriers for ongoing use of existing sites through the festival season, such that back-to-back festivals can more easily share infrastructure costs.

4.2. Driving Policy Alignment

As discussed in Section 2, Ottawa has already made meaningful policy, planning, and budget commitments to protect and support music and nightlife; the next steps will be to ensure that those commitments are translated into actions that respond to and are shaped by the on-the-ground realities felt by the people and businesses that make up the local music scene. Consultation participants recognized the steps that the City has taken in recent years to support their industry through mechanisms like the Ottawa Music Strategy, the Nightlife Economy Action Plan, the Nightlife Commissioner Office, and ongoing support for OMIC. However, participants also noted that this policy intent does not always feel fully connected to the operating realities of those working in the industry, particularly where processes managed outside the City's nightlife work (e.g., bylaw enforcement, noise complaints, event permitting, requests for extended hours) are handled in ways that feel out of step with the Nightlife Economy Action Plan.

Ottawa could also look to policy tools that provide more direct financial support to music assets in Ottawa. The City of Toronto offers one relevant example, whereby eligible live music venues can qualify for up to a 50% reduction in annual municipal property taxes through the Creative Co-Location Facilities Property Tax Subclass, which helps to reduce cost pressures on live music spaces and encourages land owners to lease to venue operators.[22] Toronto's pursuit of this policy saw the Government of Ontario amend the

[20] Roots Music Canada. 2026. "Musicians and industry people say Ottawa has a shortage of mid-size venues; can the problem be fixed?"

[21] A Crown corporation responsible for development, urban planning, and conservation across the National Capital Region.

[22] City of Toronto. "Creative Co-Location Facilities Property Tax Subclass Designation."

Assessment Act to accommodate the change, and given this precedent the City of Ottawa could consider appealing for a similar variance. Consultation participants also raised the Municipal Accommodation Tax as a possible mechanism to provide direct support to the music industry. Ottawa's MAT is charged on overnight accommodation at 6%, and participants suggested that a portion could be reinvested into the local music industry, including OMIC, recognizing live music's role in drawing visitors and contributing to downtown vibrancy.[23]

Finally, consultation participants emphasized how the success of the local music industry is shaped by many other transportation, infrastructure, and planning conditions that sit outside of cultural policy. In particular, access to downtown was identified as a barrier for audiences and music workers that live in the suburbs. Participants noted that limited suburban transit coverage and an unreliable O-Train, coupled with the high cost of taxis/Ubers to and from suburban areas, make it less likely that residents will regularly attend shows in the core neighbourhoods in which most live music venues are located. Airport connectivity was also raised as a competitiveness issue, with participants offering that limited direct international flights can make it harder to attract touring artists for shows and festivals – though some noted that this has been improving.

4.3. Sustaining Music Industry Career Pathways

Labour shortages in Ontario's music industry are a longstanding challenge,[24] but consultation participants emphasized that Ottawa has historically been somewhat insulated from this challenge because of the strength of Algonquin College's Music Industry Arts program. Many noted that the program has served as a crucial formal entry point into the industry, setting a high standard for professional roles in areas like live sound, production, and business and entrepreneurship. With the program sunsetting at the end of the 2025-2026 academic year, its absence will not easily be backfilled by any single organization. Ottawa's music industry will require a renewed all-of-industry approach to sustain a healthy training and development cycle, particularly for skilled technical workers.

Ottawa is not without other assets that help to build labour capacity in the local music market. Consultation participants pointed to longstanding organizations such as the Audio Recording Academy, OMIC's workshops and networking opportunities, and on-the-job training (or "shadowing") through festivals, live music venues, and recording studios as important to sustaining robust formal and informal pathways into the industry. This work will become even more important in the coming years as the industry adjusts to the loss of a major formal training pipeline.

Consultations also pointed to opportunities for technical workers to build skills in adjacent industries. With the recent growth of Ottawa's film industry,[25] participants pointed to opportunities for technical workers to apply production and recording skills to film and television work. Ottawa's conference and government

[23] City of Ottawa. "Hotel and short term accommodation tax."

[24] Canadian Live Music Association. 2023. "Reflections on Labour Challenges in the Live Music Industry."

[25] Ottawa Business Journal. 2026. "A soundstage remains a priority as Ottawa's film commissioner looks to boost economic impact."

events market was also cited as a steady source of technical work. While these kinds of adjacent opportunities do not replace music-specific training and development, they can nevertheless help workers build experience and diversify income within their home market.

4.4. Building A More Connected Industry

Consultations repeatedly centred the idea of industry siloes, noting that Ottawa's size makes it big enough for genre-based or subcultural scenes to develop, but not always big enough for those scenes to sustain themselves alone. As such, participants cited an ongoing visibility challenge, where DIY and genre-based communities can be highly active in drawing audiences through word-of-mouth, but struggle to reach beyond their own circles into the general audience. Participants noted the central "connector" role that OMIC has played over the past decade to address this fragmentation and "pull disparate communities together" around a more organized advocacy voice. Nevertheless, the continued work of breaking down siloes remains important to building a more cohesive industry.

This issue of siloes is especially important in Ottawa-Gatineau's bilingual context. While Anglophone and Francophone music communities both have a real presence in the region, Francophone participants noted that French music can still be perceived as "niche" or "special programming" rather than part of the wider music offer. Consultations also cited institutional losses over time, including the losses of ELMNT FM (a commercial Indigenous radio network) in September 2025 and CHUO 89.1 FM (the University of Ottawa's campus radio station) in December 2025, which were described as major blows to the local music industry that are "deeply mourned." Participants also pointed to an ongoing divide between Ottawa and Gatineau's music scenes, where geographic proximity does not always translate into regular working relationships between industry professionals. Strengthening those connections would help position Francophone music as a more central part of the region's cultural offer.

5. Conclusion

Ottawa's music industry delivers substantial economic benefits, contributing to the city's economy through both direct operations of music businesses and the associated tourism. The music industry in Ottawa is estimated to have **supported about 2,650 full-time equivalent jobs** and contributed an estimated **$108 million in labour income**, **$208 million in GDP**, and **$61 million in fiscal impacts** in 2025.

These economic impacts are made possible by the city's **highly active and diverse music industry,** that is strengthened by the industry's **connective infrastructure and support ecosystem.** The city also boasts a **strong foundation of festivals and live music venues** that have facilitated industry growth. Ottawa has a **small-town feel**, but at the same time offers **wider market access** as the national capital. The size of the market only increases when considering the **bilingual music market**. All of these dynamics contribute to Ottawa as an **excellent place to build and grow a music career**.

Certainly, there are also opportunities for growth. Ottawa's music industry can sustain and even expand its current impacts by ensuring there are **spaces for people to play and enjoy music**, maintaining **policies and planning** that align with the needs of the industry, supporting a **strong talent pipeline**, and facilitating **a connected industry**.

Appendix A: EIA Methodological Details / MyEIA

About MyEIA™

Nordicity's MyEIA Model™ is a customized economic impact analysis tool that utilizes the input-output tables published by Statistics Canada, along with other economic data (e.g., median wages by industry) to estimate how increased expenditures in any industry translate into additional employment, labour income, and GDP. The MyEIA Model™ also provides estimates of the additional federal, provincial, and local tax revenue generated by any additional economic activity.

The customized nature of the MyEIA Model™ means that it can provide reliable estimates for any industry, even if that industry is not among the industries that comprise Statistics Canada's input-output tables. With detailed data on expenditures within an industry or any type of economic shock, the MyEIA Model™ can generate estimates of direct, indirect, and induced impacts.

The MyEIA Model™ Uses an inverse Leontief matrix based on Statistics Canada's input-output tables to derive estimates of the indirect impact generated by purchases of goods and services. The model Uses Type II impact ratios published by Statistics Canada to derive induced impacts.

The MyEIA Model™ generates estimates of provincial/territorial and Canada-wide impacts. It also incorporates sub-provincial location quotients to estimate local regional economic impacts.

EIA Analysis Details and MyEIA™ Inputs

To estimate the economic impacts of the Ottawa music industry, the Ontario and Quebec sides need to be estimated separately because they operate within different provincial economic systems. The MyEIA Model™ is calibrated at the provincial level, meaning that relationships between economic indicators are specific to each province's economy. As a result, applying a single provincial model to the financial profile of the entire National Capital Region would produce inaccurate estimates.

Estimating impacts separately for Ontario and Quebec allows expenditures to be matched to the provincial economic system in which they occur, producing more precise estimates of economic and fiscal impacts. Once impacts have been calculated independently, they can be combined to present an overall picture of the National Capital Region's music economy.

The table below summarizes the cross-border corrections applied to total estimated spending prior to entering figures into the MyEIA Model™.

Table 8: Cross-Border Expense Corrections, Ottawa Music Industry Businesses

	% Labour Spend: in Province	% Labour Spend: out of Province	% Non-Labour Spend: in Provice	% Non-Labour Spend: out of Province
Ontario companies	89%	11%	89%	11%
Quebec companies	72%	28%	51%	49%

The table below summarizes the MyEIA™ inputs used for estimating the economic impact of Ottawa's music industry business operations.

Table 9: MyEIA™ Inputs, Music Business Operations

	Ontario (Ottawa)	Quebec (Gatineau)
Canada-based labour	$49,187,996	$5,763,470
Rent	$7,063,848	$673,903
Utilities	$1,315,735	$108,019
Marketing	$3,837,551	$386,344
Travel	$1,197,430	$134,459
Accommodation	$848,753	$56,757
Insurance	$2,106,586	$183,499
Tech purchase	$1,126,776	$85,205
Tech rental	$503,019	$30,285
Licensing	$616,772	$36,611
Facility maintenance	$1,418,157	$117,885
Ticketing	$270,073	$16,071
Bar and restaurant costs	$5,194,345	$311,611
Artist development	$3,536,185	$484,604
Programming costs	$17,647,994	$1,833,207
Event costs	$3,846,784	$312,418
Computer services	$899,609	$79,736
Professional services	$2,297,882	$259,742
Construction	$179,936	$10,833
Other expenses	$5,486,117	$663,577

The table below summarizes the MyEIA™ inputs for estimating the economic impact of tourism spending associated with the National Capital Region's music industry. Note that Nordicity assumes "culture" spending has already been considered as music business revenue; to avoid double-counting, culture spending was subtracted from the total visitor spending.

Table 10: MyEIA™ Inputs, Tourism

	Ontario (Ottawa)	Quebec (Gatineau)
Accommodations	$9,256,887	$15,097
Food	$6,734,150	$10,983
~~*Culture*~~	~~*$719,443*~~	~~*$1,173*~~
Transportation	$11,374,100	$18,550
Other	$1,094,215	$1,785

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