

Memo

To: City of Burlington

From: Burlington Economic Development and Tourism (BEDT)

Date: September 29 2025

Subject: Festivals, Events, and Conferences in Burlington: Impacts, the Role of the Tourism Investment Fund (TIF), and the Need for Stronger Data

Objective: This memo outlines the importance of festivals, events, and conferences to Burlington’s visitor economy, describes the role of the Tourism Investment Fund (TIF) in supporting them, and highlights the need for stronger, independent data to evaluate their impacts. The goal is to ensure Council, staff, and partners have accurate, evidence-based information to guide future planning, investment, and policy to grow the impacts of festivals and events in Burlington.

1. Burlington’s Destination Stewardship Plan: Festivals and Events

Burlington’s [Destination Stewardship Plan](#) sets the framework for ensuring that tourism growth delivers benefits for both visitors and residents, balancing economic impact with community vibrancy, sustainability, and inclusivity. The plan emphasizes animating public spaces, promoting year-round programming, and creating authentic, place-based experiences that reflect Burlington’s unique identity. Festivals and events are identified as one of the most powerful tools to achieve these objectives—bringing people together, showcasing culture, supporting local businesses, and positioning Burlington as a year-round destination of choice.

Festivals and events are a cornerstone of Burlington’s visitor economy, generating visitation, stimulating local spending, and strengthening the city’s identity as a destination of choice. At the national level, Destination Canada highlights festivals and cultural experiences as essential for attracting high-value guests and dispersing visitation across seasons and geographies. Provincially, the Tourism Industry Association of Ontario (TIAO) emphasizes that festivals and events enhance Ontario’s competitiveness, create jobs, and foster regional tourism growth. Locally, Burlington’s Destination Stewardship Plan recognizes

festivals and events as critical to animating public spaces, addressing seasonality, and diversifying offerings beyond the waterfront. Specific actions include encouraging festivals in neighbourhoods/locations outside of the downtown such as the Royal Botanical Gardens or rural areas, expanding existing events into multi-day and multi-venue experiences, and incubating new festivals aligned with niche interests (e.g., cycling, culinary, arts). Together, these strategies position festivals and events not only as economic drivers—through hotel nights, restaurant and retail spending—but also as vehicles for sustainability, accessibility, and community pride.

2. The Tourism Investment Fund (TIF)

The Tourism Investment Fund (TIF) is Burlington Economic Development and Tourism’s key tool for directly supporting and attracting festivals, conferences, and events that advance these strategies. By prioritizing overnight stays, economic impact, and year-round destination growth, the fund translates the high-level goals of the Destination Stewardship Plan into actionable, measurable outcomes for Burlington. \$130,000 was approved and distributed in 2024 and \$140,000 has been approved to date in 2025.

TIF Process Overview

- **Eligibility:** Non-profit or for-profit organizers generating a minimum of 20 Burlington hotel room nights.
- **Application:** Rolling intake, with priority given to multi-day, off-peak, inclusive, and legacy-building events. 2026 funding will shift to application windows, the first one opening in December 2025.
- **Support Provided:** Direct funding, concierge services connecting organizers with local businesses, and promotional support.
- **Accountability:** Final report required, confirming hotel nights, attendance, economic and community impact, and recognition of Burlington.

3. 2024 TIF Outcomes

In its inaugural year, TIF contributed to the ability of 7 events to move forward and enhance their economic and community impacts, with allocations totaling \$130,000:

- **447,195 attendees**, including **146,632 out-of-town visitors** (as reported by organizers).
- Local economic spin-off through hotel, restaurant, retail, and vendor activity.

Supported Events (Examples) *Data based on numbers provided by event organizers:

- Sound of Music Festival – 400,000 attendees, 52 hotel nights
- Waterfront Sculpture Trail – 8,800 attendees (6,500 visitors), 20 hotel nights
- Zero Emission Transit & Mobility Conference – 181 attendees (152 visitors), 130 hotel nights
- Canadian Urban Libraries Council Fall Meeting – 64 hotel nights
- Nickel Brook Craft Beerfest, She’s Got Leggz Annual Conference, Burlington Santa Race – 66 hotel nights combined

4. Better Understanding the Impacts of Festivals, Events, and Conferences

While conferences and business events are relatively straightforward to measure through registrations, hotel blocks, and delegate spending, festivals and open-admission events present a more complex challenge. Attendance figures are often estimated by organizers and may not reflect true unique visitor counts, nor differentiate between local and out-of-town visitors. Similarly, economic impact models can vary widely in methodology, leading to large discrepancies in reported outcomes.

To address this, BEDT commissioned Ground Level Insights (GLI) in 2025 to pilot independent data collection using mobile device analytics. The first report, included as Appendix A, analyzed the Sound of Music Festival and estimated:

- 44,922 unique attendees;
- 31.2% from outside 40 km;
- \$1.9M in incremental local spending during and after the event.

These findings stand in contrast to Sound of Music’s organizer-reported figures of ~400,000 visits, highlighting the importance of independent verification. Reports on Ribfest and Canada Day, also held at Spencer Smith Park, will follow as part of the 2025 pilot.

GLI’s methodology is based on mobile data tracking providing valuable insights into visitor origin, dwell time, and spending patterns, but does not capture every nuance of attendance (e.g., shared devices, multiple entries, multi-day visits). The data represents an estimated accuracy of 65% on visitor attendance due to data limitations including, but not limited to, device penetration and carrier coverage. This reinforces the need to combine independent analytics with stronger tracking mechanisms, such as hotel booking data, standardized reporting templates for organizers and people counters to provide accurate attendance data.

5. Lessons Learned & Process Improvements

Key lessons and improvements from the 2024 pilot year include:

- Concierge Integration: Value add service developed to increase economic impacts of festivals and events provided 101 connections between organizers and local businesses
- Process improvements including quantitative and weighted scoring rubric vs qualitative evaluation
- Need for independent data collection to verify impacts of major events including people counters, mobile data, spending data and development of economic impact data

6. Conclusion

Festivals, events, and conferences remain a cornerstone of Burlington’s visitor economy, driving visitation, local spending, and community vibrancy. However, current measurement practices—particularly for open-admission events—create challenges in accurately assessing attendance and economic impact.

The Tourism Investment Fund has contributed to the ability of a range of events to succeed and demonstrated measurable benefits. Yet, gaps in standardized data collection limit the ability to fully understand the return on investment and shape long-term strategies.

Going forward, Burlington Economic Development and Tourism (BEDT) recommends working closely with the City of Burlington to:

- Invest in independent, standardized data collection (e.g. people counters, mobile analytics, hotel occupancy, spending data).

- Apply consistent evaluation frameworks such as the Tourism Regional Economic Impact Model (TREIM) to measure impacts.
- Use improved data to inform future festival and event funding programs and infrastructure investments, ensuring that resources deliver maximum economic and community benefit.

Appendix A: Ground Level Insights Sound of Music Report 2025

Foot Traffic Analytics Report

SOUL OF MUSIC FESTIVAL BURLINGTON ONTARIO

**GROUNDLEVEL
INSIGHTS**



SOUND OF MUSIC - 2025

FOOT TRAFFIC ANALYTICS REPORT

The following report and data represented within is based on an analysis of the GroundLevel Insights anonymous mobile location data set.

This data does not represent 100% of the population, but covers the vast majority of it and can provide a good representation of the behaviour of those attending the event.

REPORT OBJECTIVES

This report will highlight as directed by the client key findings around overall attendance, attendance by zones, visitor origins, cross-visitation patterns, and visitation to key brands by categories.

The report will also include a high level estimate of the economic impact hosting the event has had on the City of Burlington.

REPORT PARAMETERS

Our current mobile data set represents an average of 65-70% of the Canadian population dependent on urban/rural density.

Young children under the age of 10 don't often have mobile phones on them and thus are not counted in our visits.

Calculations of visits are based on defining a geofence around the event area. This polygon is stored in our system and then overlaid with the number of unique mobile devices counted within it.

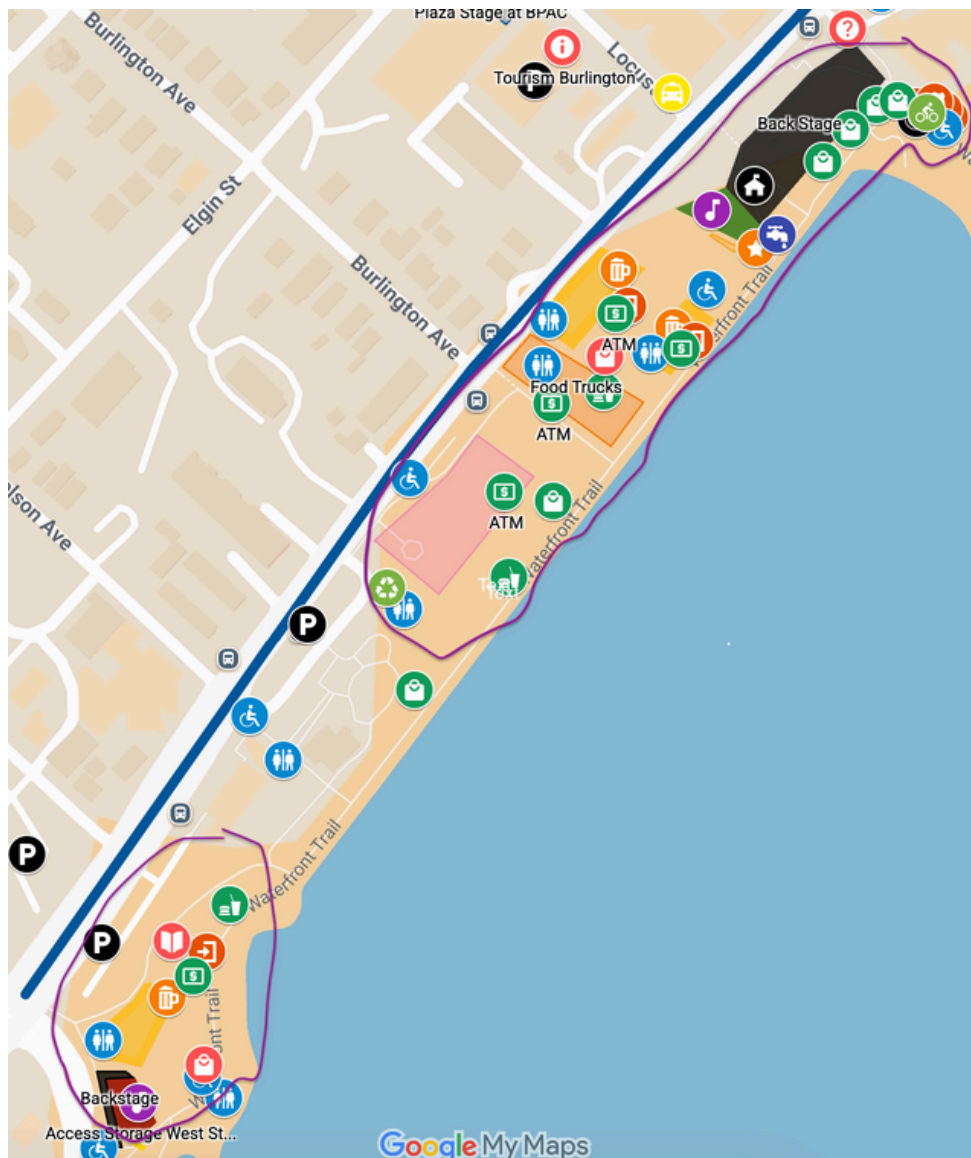
Dwell times measure the amount of time said mobile devices remain inside of the geofenced area.

OVERALL METRICS



OVERALL ATTENDANCE

The following diagram outlines the overall geofenced area encircled in red.



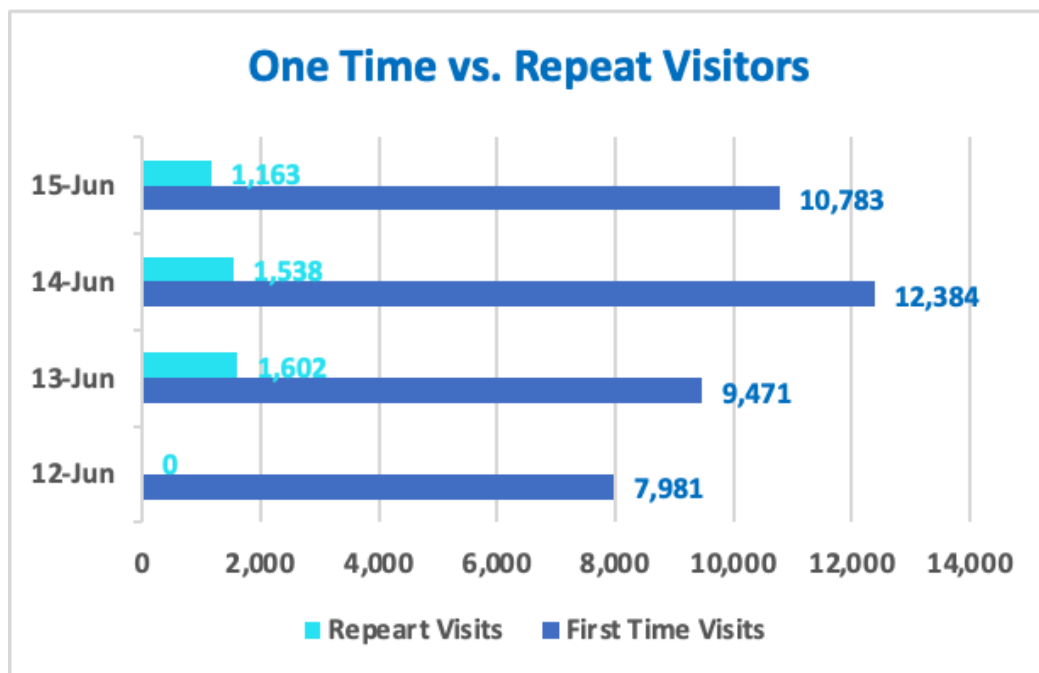
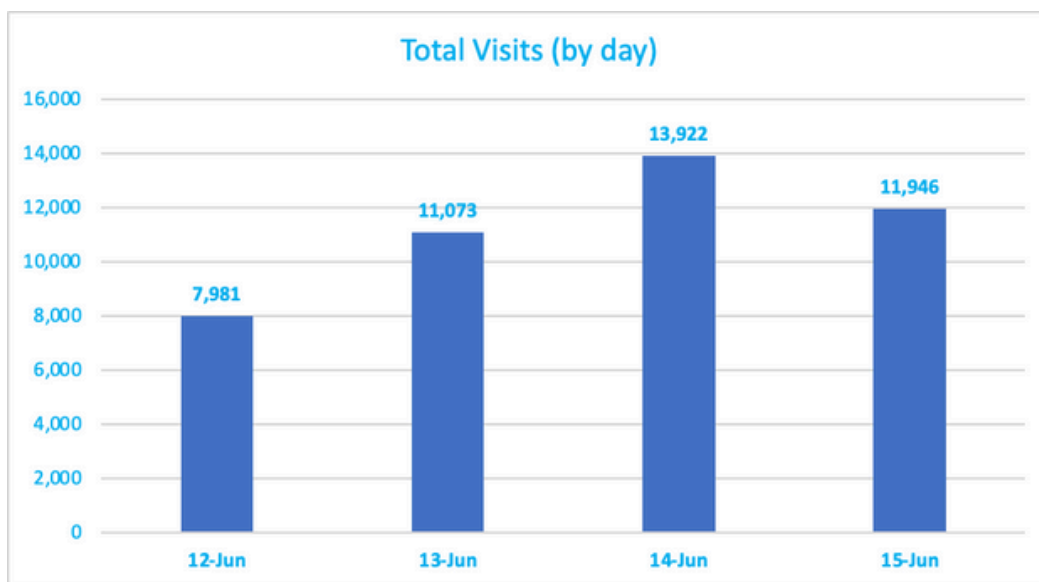


OVERALL ATTENDANCE

The following charts outline the overall total visitors by day in the specific event area, a breakdown of multi-day visitors.

44,922

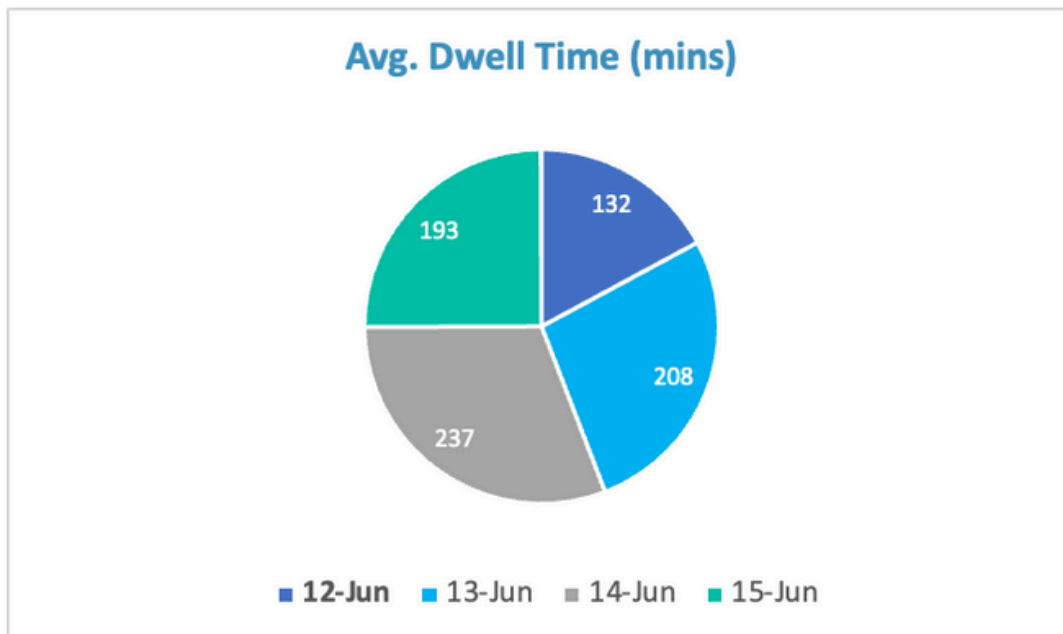
TOTAL VISITORS COUNTED



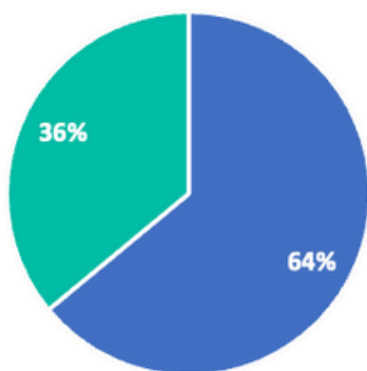


OVERALL ATTENDANCE

The following charts highlight the average dwell time in the event areas. Below that are a breakdown of the phones analyzed by operating system and device language.

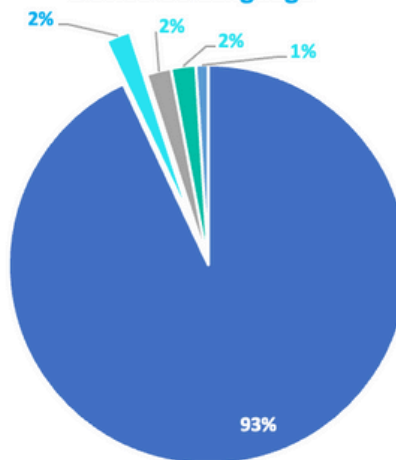


Operating System



■ iOS ■ Android

Device OS Language



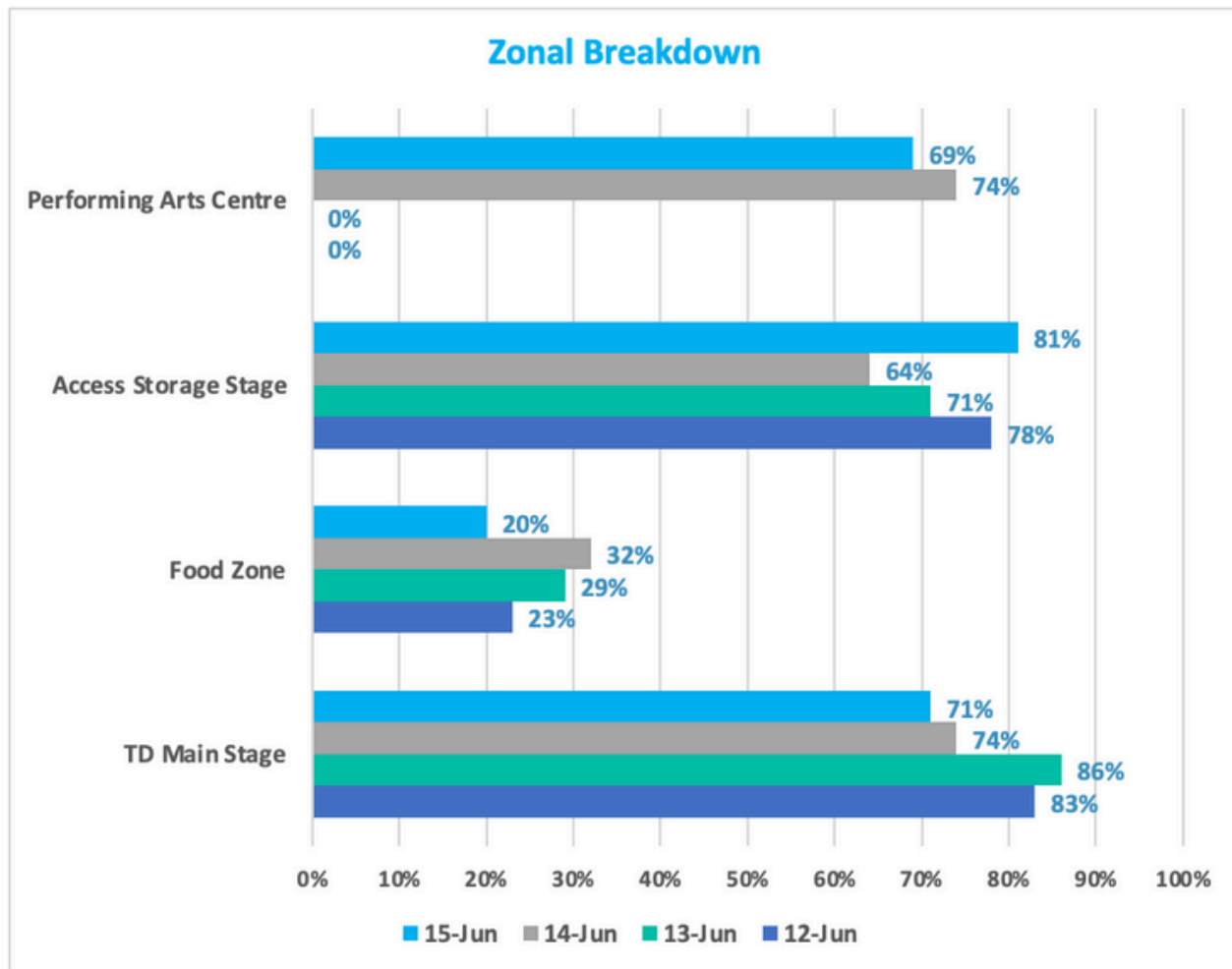
■ English ■ French ■ Mandarin ■ Spanish ■ Japanese

ZONAL ANALYSIS



OVERALL ATTENDANCE

The following charts outlines the percentage of visitors to each of the stage areas.



BRAND AFFINITY

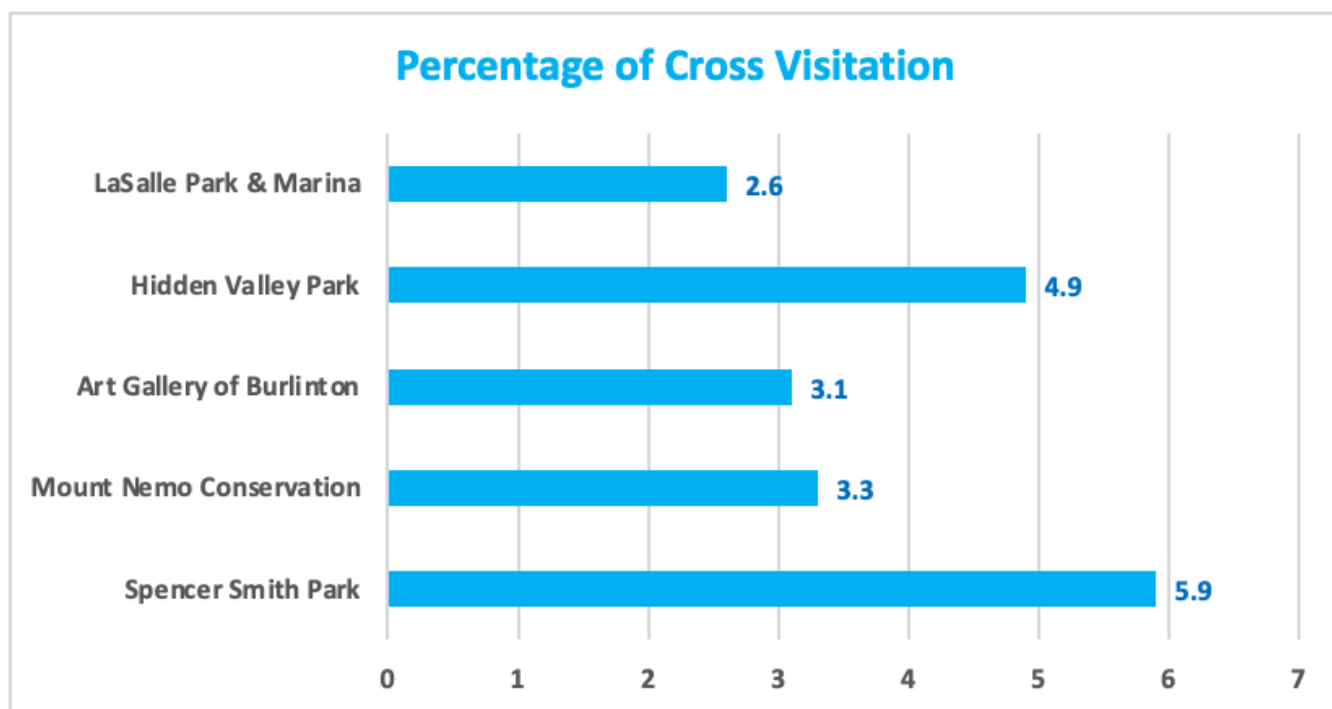


OVERALL ATTENDANCE

The following charts outlines the most visited tourist sites/attractions by visitors to the Sound of Music Festival.



ATTRACTIONS/RECREATION



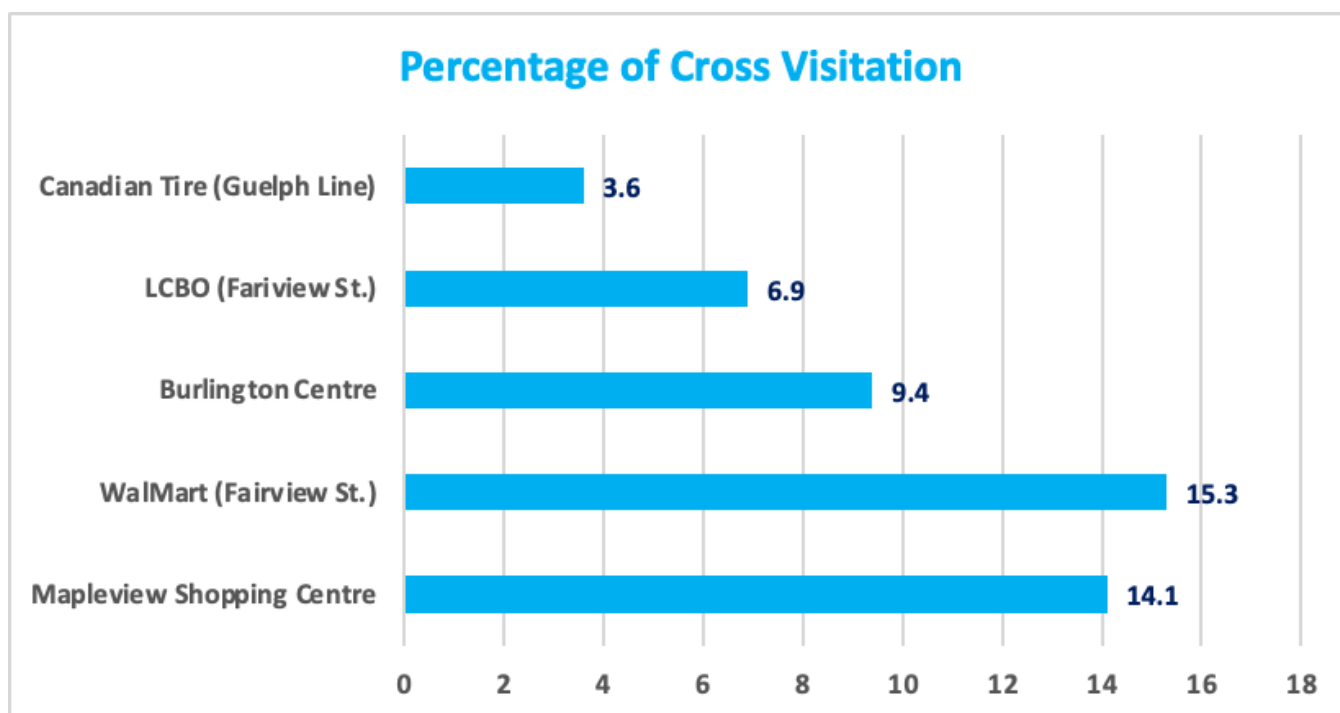


OVERALL ATTENDANCE

The following charts outlines the most visited retail stores by visitors to the Sound of Music Festival



RETAIL STORES



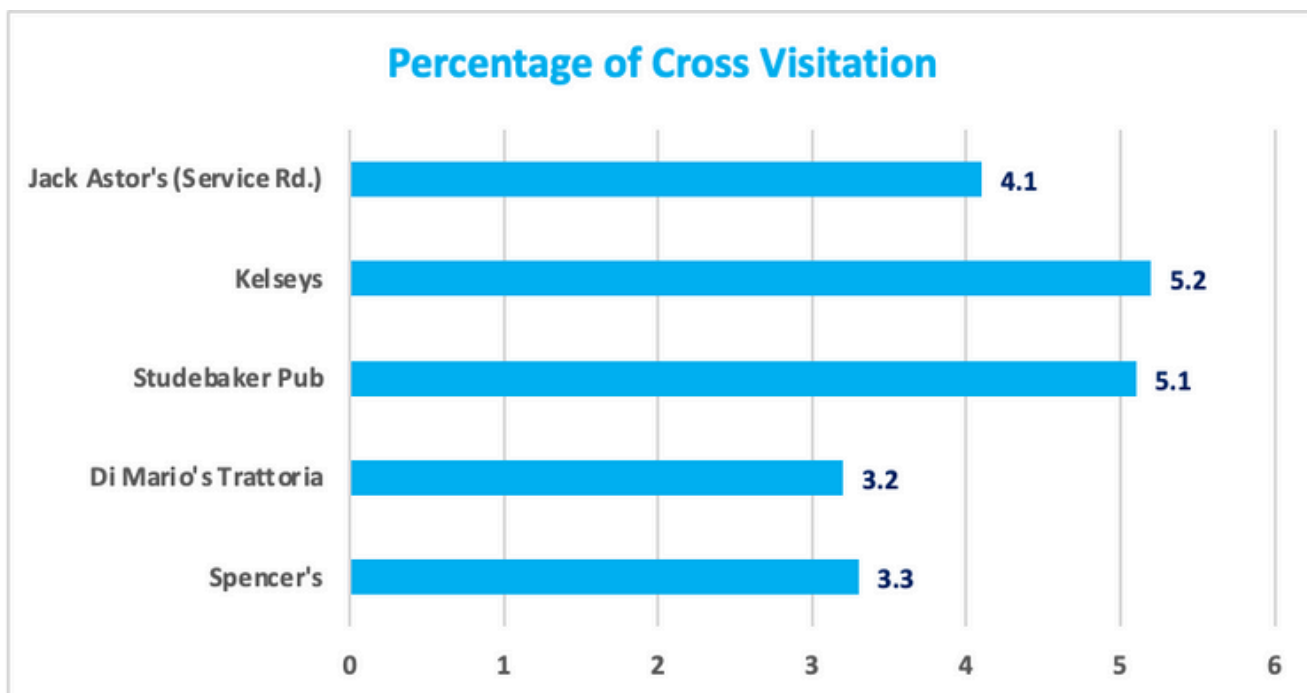


BRAND AFFINITY

The following charts outlines the most visited restaurants/bars by visitors to the Sound of Music Festival



RESTAURANTS/BARS



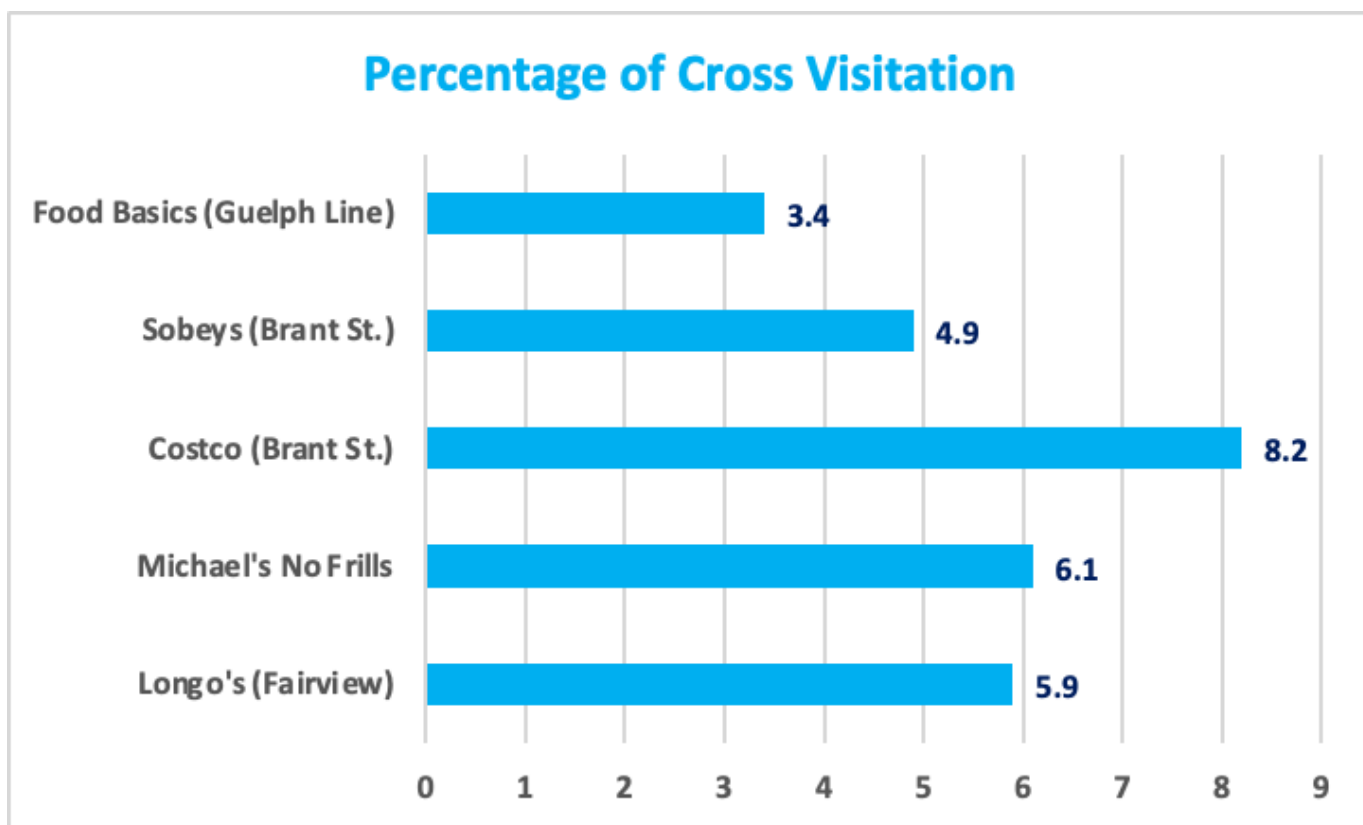


BRAND AFFINITY ANALYSIS

The following charts outlines the most visited grocery stores by visitors to the Sound of Music Festival



GROCERY STORES



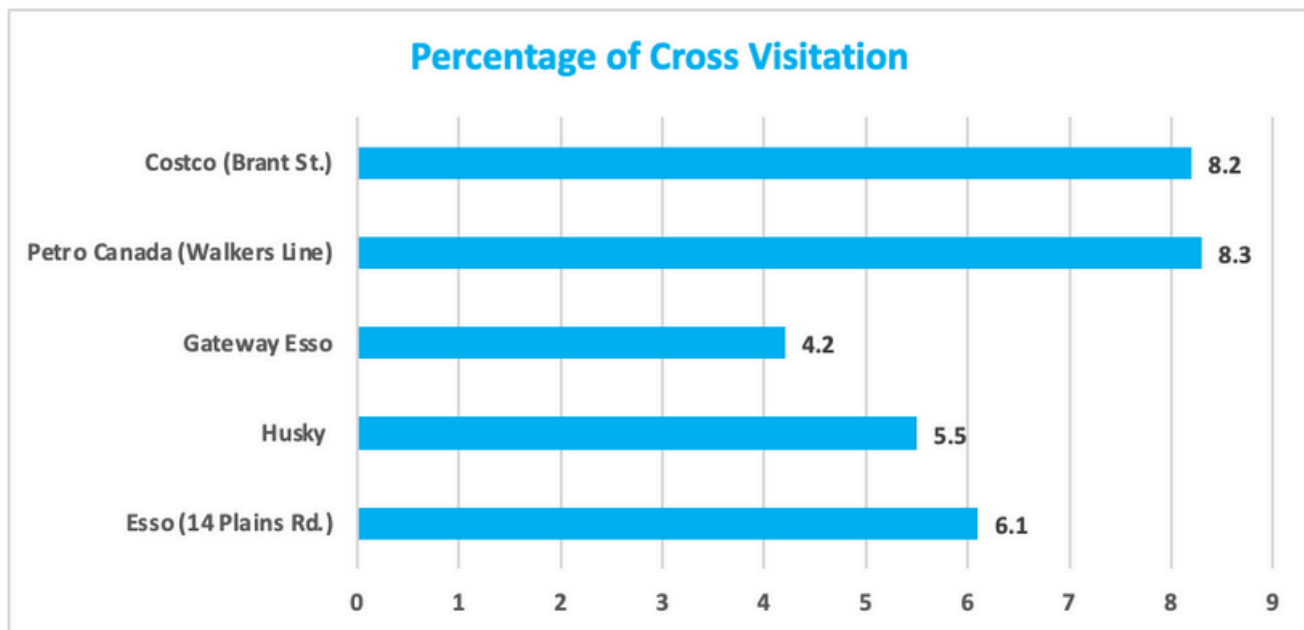


BRAND AFFINITY ANALYSIS

The following charts outlines the most visited gas/convenience locations by visitors to the Sound of Music Festival



GAS/CONVENIENCE



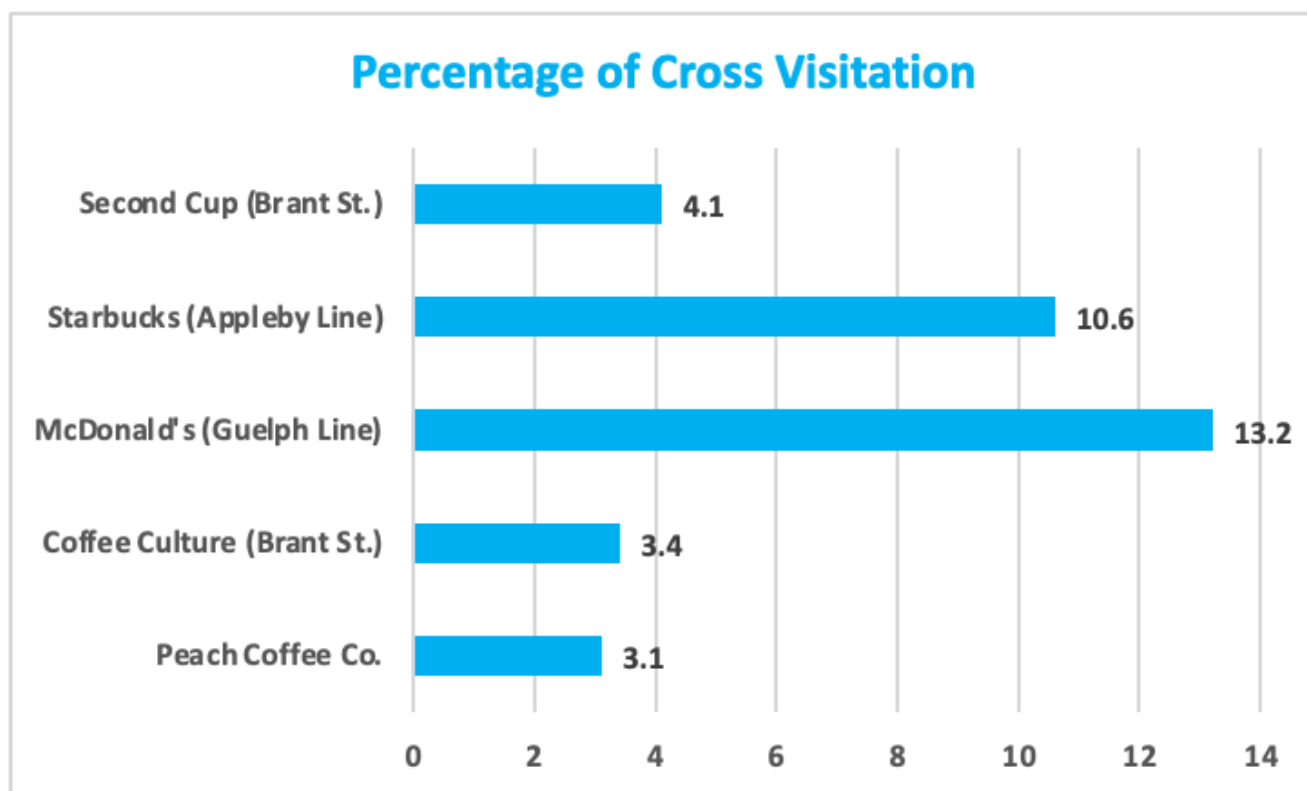


BRAND AFFINITY ANALYSIS

The following charts outlines the most visited coffee shops by visitors to the Sound of Music Festival



COFFEE SHOPS

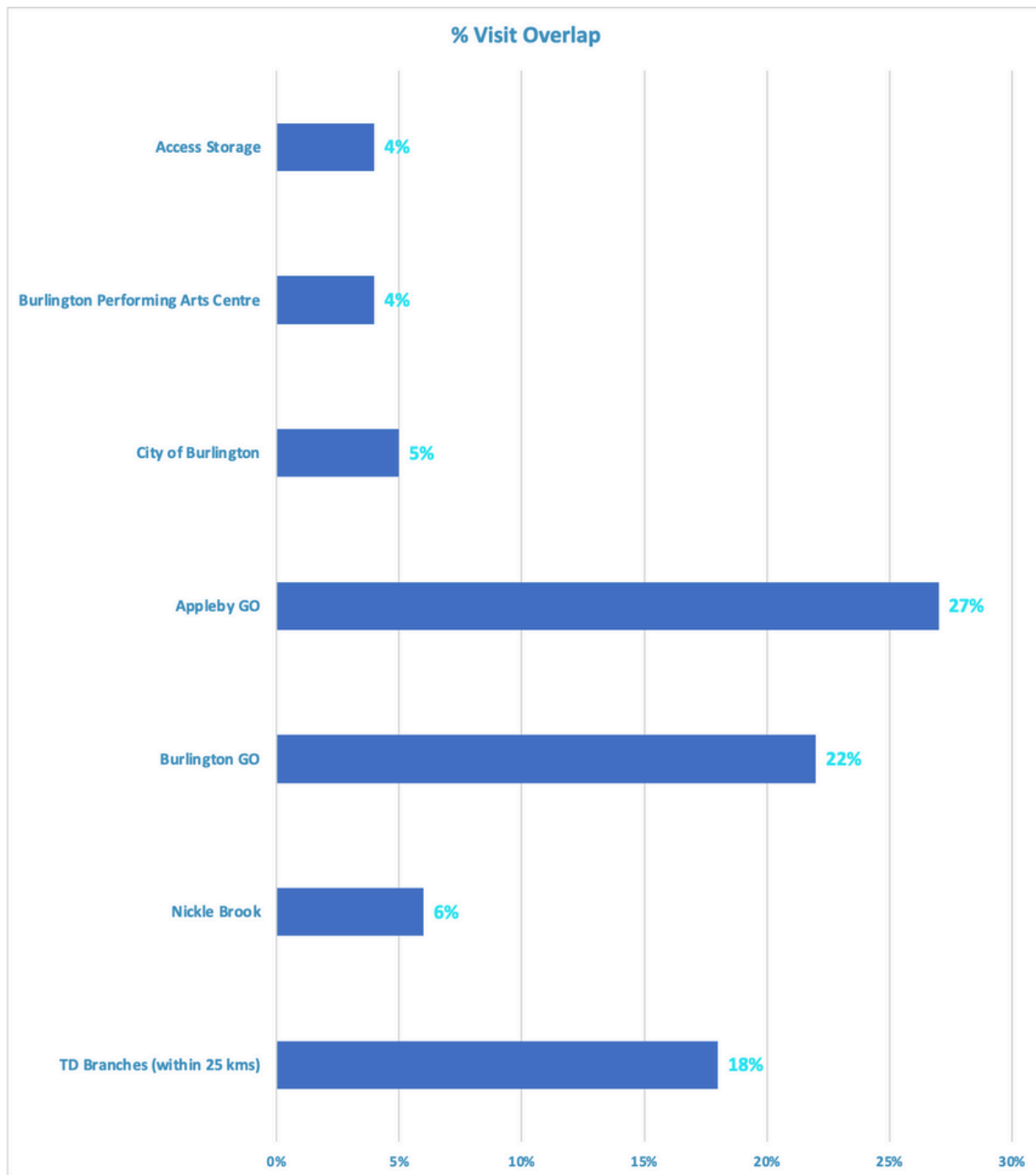


SPONSOR PARTNERS



SPONSOR PARTNER CROSS-VISITATION

The following outlines % of visits to sponsor partner locations within the time period of the festival and for 30 days post event.



ECONOMIC IMPACT



ECONOMIC IMPACT

The charts below provide key metrics on visitation to the Sound of Music Festival activation area and that **59.3%** of visitors from within the Burlington area.



DURING THE ACTIVATION DAYS WE CAN SEE A TRAFFIC INCREASE TO THE LOCAL AREA OF **377%** AND AN ESTIMATED **\$1.9M** LIFT IN REVENUE TO LOCAL BUSINESSES DURING EVENT TIMES (INCLUDING 30 DAYS POST)

*NOTE: Economic impact is calculated by creating a baseline of normal attendance in the geofenced area during an average weekend. The delta between this baseline and the event attendance captured nets the traffic increase %. This number is then multiplied by an average retail spend of \$225/person.

31.2%

OF VISITORS TRAVELED GREATER THAN 40KMS TO ATTEND

AVERAGE
DWELL TIME

193 MINS

AVG. DIST.
TRAVELED

38.22 KMS

MED. DIST.
TRAVELED

17.49 KMS



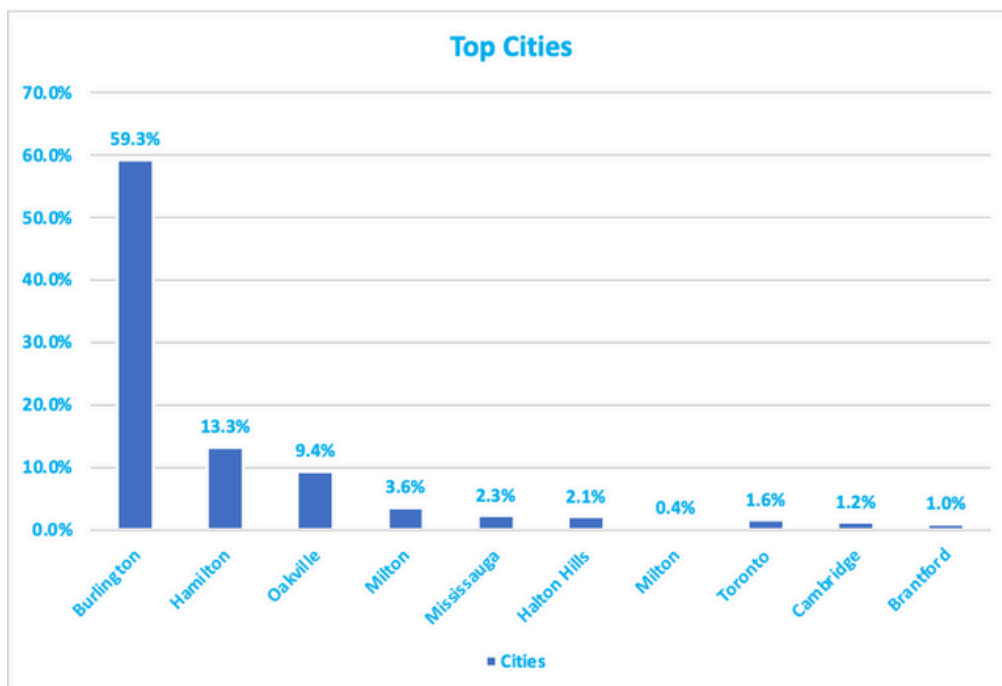
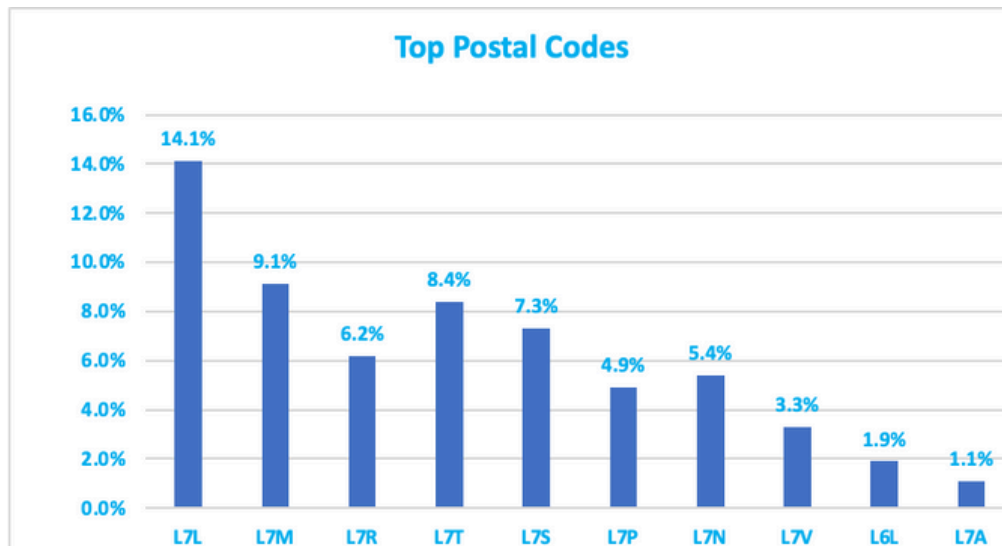
ORIGINATION DATA

The following charts outlines the % of visits segmented by cities/regions of origin and postal codes of origin

*PLEASE NOTE THAT THIS DATA (TAKEN DIRECTLY FROM THEIR GOOGLE BUSINESS LISTINGS) IS AGGREGATED AND SHOWS THE MOST COMMONLY VISITED & REVISITED PLACES BY PATRONS OVER A 30-DAY PERIOD SINCE YOUR EVENT. DEEPER INSIGHTS CAN BE GLEANED OVER LONGER OBSERVATION PERIODS.



CATCHEMENT DATA





HOW TO READ THIS REPORT

Below is an overview of how to read and interpret data in a GroundLevel Insights report

*it should be noted that all data is collected from anonymous, privacy-compliant mobile devices. This data is only a subset of your actual visitor traffic and intended to show their behaviour and movements rather than actual traffic counts.

- 1. DATA IS COLLECTED AND REPORTED ON DURING THE SPECIFIED DURATION OF THE EVENT ONLY**
- 2. ONE TIME VS. REPEAT VISITORS (WHERE APPLICABLE) IS AN INDICATION OF THOSE ATTENDING THE EVENT FOR MORE THAN ONE DAY, TAKING INTO ACCOUNT THAT ALL VISITORS ON THE FIRST DAY ARE FIRST TIME VISITORS.**
- 3. MOST VISITED LOCATIONS REFERS TO THE LOCAL BUSINESSES MOST VISITED BY EVENT GOERS DURING THE DURATION OF THE EVENT PERIOD ONLY.**
- 4. ECONOMIC IMPACT IS AN ESTIMATED VALUE BASED ON AN AVERAGE SPEND OF \$225/PERSON AND A COMPARISON OF THE TRAFFIC VOLUME AT THE EVENT VS. THE TRAFFIC VOLUME IN THE SAME PROPERTY WHEN NOT IN USE.**
- 5. FOR THIS REPORT WE HAVE NOT ADJUSTED THE OVERALL ATTENDANCE NUMBERS TO ACCOUNT FOR FAMILIES, CHILDREN, ETC.**

TURNING VISITORS INTO VALUE

We turn the world's largest location data set into human mobility insights powering better business decisions.



CONTACT US.

ASIF R. KHAN
FOUNDER & PRESIDENT

ASIF@GROUNDLEVELINSIGHTS.COM