

Memo

To: City of Burlington

From: Burlington Economic Development and Tourism (BEDT)

Date: October 5, 2025

Re: September 29th 2025 Memo on Festivals, Events, and Conferences in Burlington: Impacts, the Role of the Tourism Investment Fund (TIF), and the Need for Stronger Data

Addendum: Sound of Music Economic Impact Analysis 2022 and 2025

Executive Summary

This addendum to September 29th memo provides supporting data and analysis on the economic impact of the 2025 Sound of Music Festival, including independent visitor analytics from Ground Level Insights (GLI) and the corresponding Ontario Ministry of Tourism, Culture and Gaming's Tourism Regional Economic Impact Model (TREIM) output.

Purpose and Approach

- The analysis aligns with Burlington Economic Development and Tourism's (BEDT) commitment to providing independent, data-driven assessments of local festivals and events funded through the Tourism Investment Fund (TIF).
- Independent attendance and origin data collected by GLI were used as inputs to the Ministry's TREIM model to quantify total economic impact, employment, and tax generation associated with the 2025 festival.

- The TREIM model is an industry-standard tool used by the Province to estimate direct, indirect, and induced impacts of tourism-related spending on GDP, labour income, and taxes.

Summary of 2025 Findings

- **Visitor Count:** 69,000 (adjusted from GLI data to reflect capture limitations).
- **Visitor Composition:** 95% same-day visitors; 5% overnight.
- **Estimated Total Visitor Spending:** \$7.7 million.
- **Gross Domestic Product (GDP) Impact:** \$5.9 million (direct, indirect, and induced).
- **Employment Supported:** 66 full-year equivalent jobs.
- **Total Taxes Generated:** \$2.7 million (federal, provincial, and municipal combined).

Background and Analysis

1. Sound of Music Festival – 2022 Economic Impact Study

Methodology

- On-site survey conducted across all festival days (June 11–19, 2022)
- ~600 attendee surveys completed
- Data sources: on-site surveys, organizer accounting records
- Economic modeling: Ontario TREIM (Tourism Regional Economic Impact Model)

Attendance

- 416,000 total visits
- 240,355 unique attendees
- 32% non-local visitors (beyond 40 km)
 - 2% other provinces
 - 5% outside Canada

Spending and Impact

- \$16.3 million in new spending (non-local + operations)
- \$12.1 million total GDP impact (direct + indirect + induced)

- 136 full-year job equivalents supported
- \$5.2 million in total tax revenue
 - \$2.0 M federal
 - \$2.6 M provincial
 - \$0.6 M municipal

Local Spending (not included in economic impact)

- \$15.3 million spent by Burlington residents at local restaurants, bars, and retailers

2. Ground Level Insights (GLI) Visitor Data 2025

Independent mobile analytics commissioned for the 2025 festival provided the following updated visitor and economic uplift data.

- 44,922 unique visitors.
- 31.2% traveled >40 km.
- Average dwell: 193 minutes.
- Economic lift (retail/restaurant/other local spend): \$1.9M
- 59.3% of visitors from Burlington.

Visitor Capture Adjustment: GLI methodology captures approximately 65% of total visitors (due to device penetration and carrier coverage). Netting up for this limitation results in an adjusted estimate of ~69,000 unique visitors, which provides a more balanced basis for economic modeling

Methodology Note: GLI data is best understood as a measure of visitor behavior and origin, not a complete attendance count. Their approach focuses on geo-fencing the festival grounds, establishing a baseline of normal activity, and calculating incremental increases in device activity during the festival. Limitations include underrepresentation of young children and individuals without smartphones.

4. Economic Impact Modeling

GLI's economic lift calculation is based on a per-capita spending estimate (~\$225 per attendee) across food, gas, and retail categories. This provides a measure of incremental local business activity, but does not fully account for operational expenditures, vendor sales, or induced impacts.

By contrast, the [Ontario Tourism Regional Economic Impact Model \(TREIM\)](#), used for Sound of Music's 2022 Economic Impact Study, incorporates both visitor spending and organizational/operational spending, and estimates direct, indirect, and induced effects across GDP, jobs, and taxes.

- **2022 TREIM Report:** Estimated **\$12.1M economic impact**, based on ~416,000 attendees (32% non-local).
- **2025 TREIM (GLI Visitor Numbers):** Based on 44,922 visitors (95% same-day, 5% overnight), the Ministry's TREIM tool **estimated \$3.4M GDP impact and 41 jobs**
- **Adjusted for 65% Capture (~69,000 visitors):** The TREIM model would increase proportionally, to **~\$5.9M economic impact and 66 jobs**.

5. Comparison and Key Insights

- **Attendance:** Sound of Music 2022 Economic Impact Report ~416k vs 2025 GLI-adjusted ~69k.
- **Out-of-town share:** Both report ~30%.
- **Economic Impact:** Sound of Music 2022 \$25M vs 2025 GLI \$1.9M uplift, TREIM with GLI inputs ~\$3.4M (44K Visitors) –\$5.9M (69k Visitors) GDP.

Appendix A: Sound of Music TREIM Economic Impact Report 2025

These figures illustrate the methodology and outcomes of applying verified visitor analytics to standardized economic impact modeling. The results provide a transparent, conservative, and replicable basis for future festival and event investment reporting within Burlington’s visitor economy framework.

The Economic Impact of Sound of Music 2025 Economic Impact Report in Hamilton Halton and Brant (RTO 3) in 2025

**This report was generated by
the Ontario Ministry of Tourism, Culture and Gaming TREIM model**

October 05,2025

Note: The Ministry of Tourism, Culture and Gaming does not take any responsibility for inputs that the user has provided, nor for the interpretation of the results.

1. Introduction

This report provides an estimate of the economic impact that Sound of Music 2025 Economic Impact Report is expected to have on Ontario's economy, in terms of Gross Domestic Product, employment and taxes generated. The analysis is based on the following information the user has provided to the MTCS Tourism Regional Economic Impact Model:

Number of Visitors for Activity (or Event) of Type Festivals/Fairs

	Total Number of Visitors	Same Day (% of visitors' origin)	Overnight (% of visitors' origin)	Average Length of Stay (nights)
Ontario	69,000	95.00%	5.00%	0
Rest of Canada	0	0.00%	0.00%	0
USA	0	0.00%	0.00%	0
Overseas	0	0.00%	0.00%	0
Total	69,000			

The user also has selected the following parameters:

- The visits take place in Hamilton Halton and Brant (RTO 3) in 2025
- The impact is to be shown for Hamilton Halton and Brant (RTO 3)
- Induced impacts of household spending are included
- Induced impacts of business investment are included
- Local government property tax revenue impacts are included

2. Summary of Findings

Table 1. Economic Impacts of Sound of Music 2025 Economic Impact Report in Hamilton Halton and Brant (RTO 3) in 2025 (in dollars)

	Hamilton Halton and Brant (RTO 3)	Rest of Province
Total Visitors' Spending	\$7,733,461	
Gross Domestic Product (GDP)		
Direct	\$4,022,582	\$0
Indirect	\$811,120	\$305,115
Induced	\$1,097,157	\$421,754
Total	\$5,930,860	\$726,869
Labour Income		
Direct	\$2,011,213	\$0
Indirect	\$538,672	\$194,883
Induced	\$665,575	\$277,289
Total	\$3,215,460	\$472,171
Employment (Jobs)		
Direct	53	0
Indirect	7	2
Induced	6	3
Total	66	6
Direct Taxes		
Federal	\$680,691	\$0
Provincial	\$1,220,767	\$0
Municipal	\$105,453	\$0
Total	\$2,006,911	\$0
Total Taxes		
Federal	\$1,021,204	\$102,238
Provincial	\$1,463,464	\$72,212
Municipal	\$244,254	\$29,380
Total	\$2,728,922	\$203,830

Table 2. Economic Impacts of Sound of Music 2025 Economic Impact Report in Hamilton Halton and Brant (RTO 3) on GDP by industry (in dollars)

Industry	Impact on Hamilton Halton and Brant (RTO 3)		Impact on Rest of Province	
	Direct GDP	Total GDP	Direct GDP	Total GDP
Crop and Animal Production	\$0	\$4,592	\$0	\$16,880
Forestry, Fishing and Hunting	\$0	\$1,138	\$0	\$4,643
Mining and Oil and Gas Extraction	\$0	\$7,981	\$0	\$14,126
Utilities	\$0	\$25,510	\$0	\$25,755
Construction	\$0	\$105,399	\$0	\$52,889
Manufacturing	\$70,343	\$194,012	\$0	\$68,666
Wholesale Trade	\$54,213	\$161,382	\$0	\$60,949
Retail Trade	\$312,786	\$499,184	\$0	\$41,184
Other Transportation and Warehousing	\$82,714	\$125,744	\$0	\$78,340
Ground Passenger Transportation (excl. Rail)	\$8,996	\$17,059	\$0	\$8,058
Information and Cultural Industries	\$27,992	\$105,681	\$0	\$35,894
Other Finance, Insurance, Real Estate and Renting and Leasing	\$20	\$356,423	\$0	\$145,190
Car Renting and Leasing	\$2,873	\$9,877	\$0	\$3,285
Owner Occupied Housing	\$0	\$215,169	\$0	\$15,643
Professional, Scientific and Technical Services	\$0	\$144,553	\$0	\$35,906
Other Administrative and Other Support Services	\$0	\$75,338	\$0	\$19,435
Travel Agencies	\$0	\$5,083	\$0	\$1,460
Education Services	\$15,565	\$56,027	\$0	\$6,507
Health Care and Social Assistance	\$5,403	\$64,728	\$0	\$9,451
Arts, Entertainment and Recreation	\$768,499	\$778,302	\$0	\$13,687
Accommodation Services	\$119,223	\$124,212	\$0	\$994
Food & Beverage Services	\$859,614	\$899,616	\$0	\$12,118
Other Services (Except Public Administration)	\$125,044	\$162,543	\$0	\$15,746
Operating, Office, Cafeteria, and Laboratory Supplies	\$0	\$0	\$0	\$0
Travel & Entertainment, Advertising & Promotion	\$0	\$0	\$0	\$0
Transportation Margins	\$0	\$0	\$0	\$0
Non-Profit Institutions Serving Households	\$69,597	\$86,308	\$0	\$15,554
Government Sector	\$77,506	\$119,987	\$0	\$12,562
Net Indirect Taxes on Production	\$1,422,196	\$1,585,012	\$0	\$11,946
Total	\$4,022,582	\$5,930,860	\$0	\$726,869

Appendix:

The Economic Impact of Visits in Hamilton Halton and Brant (RTO 3) and, if applicable, the rest of Ontario: since no Ontario region is economically self-sustaining, in order to produce the goods and services demanded by its visitors, it will need to import some goods and services from other regions. As such, some of the economic benefits of the visitors' spending in Hamilton Halton and Brant (RTO 3) will spill over to the rest of the province and to regions outside Ontario. Impacts outside Ontario are not estimated by the TREIM.

Gross Domestic Product (GDP): value of goods and services produced by labour and capital located within a country (or region), regardless of nationality of labour or ownership. GDP is measured at market prices which include net indirect taxes on products. Tourism GDP refers to the GDP generated in those businesses that directly produce or provide goods and services for travelers.

Direct impact: refers to the impact generated in businesses or sectors that produce or provide goods and services directly to travelers, e.g. accommodations, restaurants, recreations, travel agents, transportation and retail enterprises etc. Direct impact on GDP, employment and tax revenues is also called tourism GDP, tourism employment and tourism tax revenues.

Indirect impact: refers to the impact resulting from the expansion of demand from businesses or sectors directly produce or provide goods and services to travelers, to other businesses or sectors.

Induced impact: refers to the impact associated with the re-spending of labour income and /or profits earned in the industries that serve travelers directly and indirectly.

Employment: refers to number of jobs, it include full-time, part-time, seasonal and temporary employment (based on the share of the year worked), for both employed and self-employed workers.

Federal tax revenues: include personal income tax, corporate income tax, commodity tax (GST/HST, gas tax, excise tax, excise duty, air tax and trading profits) and payroll deduction that is collected by the federal government.

Provincial tax revenues: include personal income tax, corporate income tax, commodity tax (PST/HST, gas tax, liquor gallonage tax, amusement tax and trading profits) and employer health tax that is collected by the Ontario provincial government.

Municipal tax revenues: include business and personal property and education taxes that are collected by the municipalities. Collection, however, does not follow immediately the consumption or production of goods and services in a municipality by visitors (as is the case with HST or personal income taxes). Rather, these taxes show the percent of the total property taxes collected by a municipality that can be attributed to tourism because of tourism's contribution to the economic activity of the municipality and hence its tax base.

Industry: The industry follows Statistics Canada's North America Industry Classification System (NAICS) Input-Output small aggregation industry classification.