Prince Edward Island's Harness Racing Industry

Economic Impact Analysis

December 2024

MRSB

Photo Source: Red Shores

December 2024

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Table of Contents

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Photo Source: Red Shores

Executive Summary

Harness racing in Prince Edward Island began as a community-based pastime in the late 1800s. It has since evolved to having become a professionalized industry that honours its humble heritage but now has wide-ranging quantitative and qualitative benefits to the Island, the Maritime and Atlantic regions of Canada, and the country as a whole.

In speaking with over **55 industry stakeholders**, analyzing survey responses from **230 off-Island participants** of PEI's industry, and **reviewing past reports created for the Prince Edward Island Harness Racing Industry Association**, **similar reports from other jurisdictions**, and current available **financial statements and annual reports** of **industry associations**, the economic importance of the harness racing industry in PEI became abundantly clear. Calculations from the economic impact analysis completed for this study confirmed that harness racing has far-reaching impact on the economic vitality of Prince Edward Island and provinces across Canada.

Extensive data gathering determined that the PEI harness racing industry has total annual expenditures estimated at $82.4 million inclusive to all industry sources' capital and operating expenses. From these expenditures, the **PEI harness racing industry generates an estimated $117 million in gross production on Prince Edward Island. It contributes $57.571 million in gross domestic product to PEI and an estimated $95.837 total gross domestic product to Canada as whole**. This PEI GDP impact is made up of direct contributions of $24.599 million, indirect contributions of $20.854 million, and induced contributions of $12.118 million.

Harness racing has far-reaching impact on the economic vitality of Prince Edward Island and provinces across Canada.

In addition, PEI Harness Racing contributes an estimated 819.64 full time equivalent jobs (FTE) to Prince Edward Island's economy including 457 direct FTE, 274.49 indirect FTE, and 87.15 induced FTE with that employment covering a wide variety of industries from retail trade to motor vehicle and trailer repair, to agriculture, to professional services among many others.

PEI Harness Racing Industry's Impact by the Numbers:

Total GDP Impact Canada-Wide

$95.8 million
PEI: $57.6 million

Total Full-Time Equivalent Jobs Canada-Wide

1,083 Jobs
PEI: 820 Jobs

Total Government Tax Revenue Impact Canada-Wide

$18.7 million
PEI: $11.4 million

Further, harness racing contributes an estimated $11.4 million in tax revenue to the Government of PEI and $18.7 million in tax revenue in total to the provinces and territories of Canada. These tax revenues represent significant revenues to government allowing them to realize a return on their support of the industry.

PEI has 759 active members of Standardbred Canada, which is 51% of Atlantic Canada's membership and 12% of Canada's membership – both figures that far outweigh the population distribution of each. Resulting from this overrepresentation within Canada's industry from Island-based participants, there are unique benefits of the industry on PEI. Namely (and as discussed throughout this **Economic Impact Analysis**), harness racing creates synergistic support of small businesses, farmers, and various other industries on PEI. It enables invaluable learning opportunities with the Atlantic Veterinary College at the University of Prince Edward Island and with private veterinary clinicians. It serves to preserve agricultural land and the Island's pastoral beauty; it maintains the Island's rurality; it offers opportunities for youth participation and development; and it enhances PEI's reputation on a global scale. All of these qualitative benefits represent items that help support PEI's tourism industry as well.

In short, while the harness racing industry is considered by many participants to be a passion that would be pursued even with no financial benefit, the transition from a "sport" to an "industry" is notably represented by the extent of its impact on the Island's economy.

Photo Source: Red Shores

1 Introduction

1.1 Background

The harness racing industry in Prince Edward Island (PEI, “the Island”) stands as a vibrant and integral part of the Island’s cultural and sporting heritage. With a rich history dating to the 1880s, harness racing has evolved into a beloved tradition that attracts locals and visitors alike as participants, spectators, and benefactors. As one of the premier locations for harness racing in Canada, the Island showcases a dynamic blend of skilled horsemanship, passionate spectators, and a sense of community that transcends generations. Beyond its cultural and recreational allure, harness racing generates a myriad of economic benefits that ripple throughout various sectors within PEI and across the region.

The harness racing industry in Prince Edward Island serves as a powerful economic driver, contributing significantly to the province's financial prosperity – in part by hosting marquee regional events, such as the Gold Cup & Saucer, the Governor’s Plate, and regular race programs – but primarily through supporting the daily activities of direct industry participants. The industry creates opportunities for trainers, drivers, breeders, owners, and racetrack staff, fostering a dedicated workforce. The demand for goods and services related to harness racing, such as feed, equipment, and veterinary care stimulates local businesses and contributes to the overall economic vitality of the Island. The influx of tourists and out-of-province participants drawn to the excitement of harness racing events further amplifies the economic impact, as visitors patronize hotels, restaurants, and other establishments, injecting revenue into the local economy. In essence, the harness racing industry in Prince Edward Island is not only a source of entertainment and cultural pride but also a vital economic asset that fuels growth and sustains livelihoods.

The Prince Edward Island Harness Racing Industry Association (PEIHRIA) is continually taking deliberate actions to enhance the success of the industry, supporting growth and innovation. PEIHRIA engaged MRSB Consulting Service Inc. (MRSB) to perform an economic impact analysis to demonstrate the sustainable future of the harness racing

> *The harness racing industry in Prince Edward Island stands as a vibrant and integral part of the Island’s cultural and sporting heritage.*

industry in PEI, quantify the current impact, and further evidence the economic benefits generated by the industry which contribute to the Island's overall prosperity.

1.2 Project Methodology

Effort was made to holistically understand the harness racing industry as it currently exists in PEI, within the Atlantic Canadian region, across Canada, and in select US jurisdictions. Previous reports produced by or on behalf of PEIHRIA were reviewed, including:

- *On Track – Working Together for a Prosperous Future in the PEI Harness Racing Sector* (2005);
- *Working Together – Capitalizing on Opportunities for Growth* (2010);
- *Growth and Sustainability Plan* (2019); and
- *Drive to Thrive: Vision 2030* (2019).

Reports from other jurisdictions were also reviewed, including:

- *The Economic Contribution of Horse Racing in Ontario* (2018);
- *The Economic Impacts of Horse Breeding, Raising, and Racing in Alberta* (2019);
- *Economic Impact Study: New York Standardbred Horseracing Industry* (2020);
- *The Canadian Equine Sector: Socio-Economic Insights* (2023); and
- *Economic Impact Study, Massachusetts Harness Horseracing Industry* (2024).

This review of background material preliminary informed the considerations to be included within the methodology for this project, **Prince Edward Island's Harness Racing Industry: Economic Impact Analysis**.

To gather data for input into the economic model and also to identify individuals' roles and important qualitative themes for the data's context, a significant amount of primary research was performed. This included:

- **Completing 55 stakeholder interviews**. We held in-depth conversations with the following stakeholders to quantify various financial inputs into the economic model and to further understand the qualitative importance of the harness racing industry in PEI.
  - Breeders: **10**
  - Owners, drivers, trainers, grooms: **12**
  - Private veterinarians, farriers, Atlantic Veterinary College, feed and tack shops: **5**
  - Federal, provincial, and municipal government officials and staff; government agencies; and crown corporations: **10**
  - Red Shores Charlottetown and Summerside, Atlantic Lottery Corporation: **3**
  - Horse racing industry associations and organizations: **10**
  - Additional indirect industry participants: **5**
- **Distributing a survey to off-Island participants**. The survey was completed by **230** respondents to further inform inputs to the quantitative economic model and collect additional context regarding the wide-ranging economic benefits.

- **Financial data collection**. The financial statements of various entities, such as PEIHRIA, Red Shores Racetrack and Casino, the Canadian Pari-Mutuel Agency, and other industry associations and participants were collected, analyzed, and formatted for input into the economic impact model.

All financial information collected through this primary research was organized for input into the economic model, the output of which is presented in Section 3.3 – Results. Qualitative information was organized into the various themes explored in Section 2.1 – PEI Industry Profile and Section 3.4 – Qualitative Impacts of the Industry.

Photo Source: Red Shores

2 Current State of the Industry

2.1 PEI Industry Profile

PEI's harness racing industry is comprised of dedicated and passionate participants and supporters, and it is widely considered to be the centre of harness racing in Atlantic Canada (the provinces of PEI, New Brunswick, Nova Scotia, and Newfoundland and Labrador). The majority of harness racing participants and races/events within Atlantic Canada are based in PEI. PEI claims the title of "Kentucky of Canada"[1], hosting internationally renowned events every year, the two most prominent being the Gold Cup & Saucer and the Governor's Plate. PEI is the second largest producer of standardbred horses across Canada, and is the top producer in Atlantic Canada.

The harness racing industry on PEI is composed of 759 active members, according to Standardbred Canada's current membership numbers (as of November 2024). Standardbred Canada is the umbrella organization for the industry in Canada and works in tandem with the PEI industry. Table 1 below breaks down these members' roles in the industry.

Table 1. Standardbred Canada's membership by role for PEI, Atlantic Canada, and Canada as of November 2024.

Standardbred Canada Membership (November 2024)				***Percentage of PEI Members Regionally and Nationally***	
	PEI	Atlantic Canada	Canada	PEI Percentage of Atlantic Canadian Membership	PEI Percentage of Canadian Membership
Active members[2]	759	1,488	6,530	51%	12%
Owners	705	1,344	5,810	52%	12%
Breeders	255	438	2,510	58%	10%
Trainers	132	254	1,247	52%	11%
Drivers	75	194	780	39%	10%
Grooms	67	168	584	40%	11%
Officials	11	48	127	23%	9%

[1] Tourism PEI. (nd). *Harness Racing*. https://www.tourismpei.com/what-to-do/outdoor-activities/harness-racing

[2] Data provided by Standardbred Canada. An active member may be represented in various categories.

Of Standardbred Canada's membership within Atlantic Canada, members from PEI represent more than half of all active members, in addition to more than half of the segments of owners, breeders, and trainers. To put this into perspective, the population of PEI represents only 7% of Atlantic Canada's total population.[3]

Nationally, PEI's Standardbred Canada's membership represents 12% of the active members and over 10% of the segments of owners, breeders, trainers, drivers, and grooms, whereas PEI's total population represents only 0.4% of the country's overall population. The Island's harness racing industry's contribution at both the regional and national levels, therefore, represents a significantly outsized provincial contribution from Island industry participants.

Approximately 67% of harness races held within Atlantic Canada take place in PEI[4], and the region's largest sale of standardbreds – the Atlantic Classic Yearling Sale – is hosted in Crapaud, PEI each year. This sale draws Island-based and Maritime participants and purchasers from across Canada and the United States.

Throughout the key informant interviews, it became clear that much of the industry's preservation, wellbeing, and growth is due to harness racing's passionate participants and their dedication to the industry. The Government of PEI's continued financial investment has helped to support the industry's growth. In turn, the PEI harness racing community has turned a sport and cultural pastime into an industry that drives many sectors in the PEI economy and draws people to the Island.

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Red Shores is a prominent example of the symbiotic nature of the industry and other sectors on PEI. Red Shores Racetrack and Casino's entertainment centres were established by the Atlantic Lottery Corporation (ALC) at the existing Charlottetown and Summerside racetracks. Representatives associated with ALC noted that Red Shores benefits greatly from the Island's active harness racing industry and that its business cannot be separated from the industry. It, in turn, works to promote the industry's social, cultural, and entertainment value to the public. Many key informants remarked that Red Shores would not exist as it is today without harness racing. Certainly, Red Shores is inextricably tied to the harness racing industry and much of its commercial activity is directly related, or due entirely, to the foundational presence of harness racing.

The industry continues to grow on Prince Edward Island, and as many key informants shared, it has outgrown the current infrastructure available on the Island. Owners and trainers engaged for this report spoke to the fact that it is hard to get stable space at Red Shores, and other key informants

[3] Government of Prince Edward Island. (25 September 2024). *PEI Population Report Quarterly*. https://www.princeedwardisland.ca/en/information/finance/pei-population-report-quarterly
[4] Standardbred Canada. (2024). *SC National Racing Statistics: Annual Report January 1, 2023 – December 31, 2023*.

mentioned what a challenge it is to find spaces that can accommodate workshops and hands-on equine care training. Current infrastructure is a combination of stable and event spaces at the Charlottetown Driving Park, the Summerside Raceway, the Crapaud Agriplex,[5] and privately-owned barns. In 2014, Red Shores replaced aging barns at the Charlottetown Driving Park with a new 120-stall barn.[6] This was an important infrastructural investment into the future of the industry as noted by news reports at the time;[7] however, as identified by key informants in this report, more infrastructure is required to accommodate the industry's further growth and development. Should these infrastructure investments occur, these capital expenditures would drive increased economic impact from the industry to the province.

The industry's growth to date, aided by government and partner support, has occurred despite the challenges that harness racing industry members face. Industry participants face rising costs in most all areas of industry expenses. The costs associated with buying, training, racing, and caring for horses have increased, and though PEI has increased its purse sizes for greater compensation, rising costs for everyday supplies pose a challenge to participants' continued participation.

Despite these economic challenges, many key informants conveyed a sense of positivity for the future of the industry in PEI. Many referenced the Government of PEI's support of the industry and the youth participation they witness around the Island as evidence of the strong future prospects of the industry. Increasingly, young people are at the track and helping in the barns, and according to interviewees, this inspires life-long participation. There are also more young people (generally, twenty-to-thirty-year-olds) becoming involved with clubs and associations at the board level. The matinee tracks and new initiatives, such as miniature horse races held at Island racetracks, further engage adolescents and children. By engaging participants under 18 at the matinee track level, industry hopes this next generation will remain active participants of harness racing throughout their lives. Other new participants in the industry have come through fractional ownership programs that allow people to purchase a share of a horse. This lower barrier to entry into horse ownership involves the harness racing-curious as active industry participants who undoubtedly expose their friends, family, and broader network to harness racing.

The new participants and new generations entering the industry represent key markers of the industry's continued relevance and significance to Prince Edward Island. The current PEI harness racing industry is built upon a strong foundation of heritage, culture, and passion, and has been further strengthened by the continued professionalization of its participants. It is well-supported by its members and industry associations and well-positioned to grow in the

The current PEI harness racing industry is built upon a strong foundation of heritage, culture, and passion.

[5] Crapaud Exhibition. (nd). *Crapaud Agriplex*. https://crapaudagriplex.ca/
[6] Government of Canada. (11 October 2014). "New Stables Officially Opened at Red Shores Racetrack." https://www.canada.ca/en/news/archive/2014/10/new-stables-officially-opened-red-shores-racetrack.html
[7] CBC News. (7 January 2014). "$2M invested in new harness racing barns." https://www.cbc.ca/news/canada/prince-edward-island/2m-invested-in-new-harness-racing-barns-1.2487011

coming years with strategic and continued government support.

2.1.1 Private and/or Individual Industry Participants

Hundreds of people working in a variety of roles work to maintain and advance harness racing in PEI. Roles in the industry include owners, breeders, trainers, grooms, drivers, and officials; and the industry's day-to-day operations see additional sectors, such as veterinary medicine, agriculture, and retail indelibly intertwined.

The following sections provide snapshots of the different roles in the industry, as communicated through key informant interviews by the wide variety of individuals who fill them. It must be noted that industry participants often fill more than one role within the industry; in fact, it was rare to identify individuals who did not. This could be represented by any combination of such titles as breeder, owner, trainer, driver, groom, and farrier; they could also be volunteer directors for one or more of the industry's many associations. It was clearly noted that no part of the industry can exist without the other. Participants are reliant on one another and on the supporting sectors to keep harness racing running on PEI, and the industry is deeply interwoven into the PEI economy. The harness racing sector supports a number of small businesses on Prince Edward Island including feed mills, tack, shops, gas stations, and more.

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2.1.1.1 Owners

There are currently 705 standardbred owners on PEI registered with Standardbred Canada. One key informant observed that the current demographic for standardbred ownership is skewed to older people. As it is an expensive endeavour, especially considering the current price of purchasing horses and the rising costs associated with keeping and racing a horse, full horse ownership by a sole individual tends to skew to a more established, financially secure demographic. There is also significant risk involved. Buyers of yearlings gamble on the horse's health and racing abilities at the time of purchase. There is no way to know in advance, for example, the extent of a yearling's lifetime veterinary service needs at the time of purchase. Vet fees can quickly accumulate at great expense to the owner, and in some cases, the owner may not be able to race the horse as often as planned to partially offset these expenses. For younger people, the total expense of a horse's purchase and upkeep, as well as the financial risks involved in horse ownership, makes owning a horse by oneself inviable for many. Fractional ownership makes horse ownership a possibility and a reality for many, and through fractional ownership, owner demographics range from young adults to seniors.

Fractional ownership makes horse ownership a possibility and a reality for many. ”

There are many expenses involved in owning and caring for a racehorse, including stable fees, maintenance, and property taxes for horse barn(s) (if owned), as well as feed, hay, veterinary services, and farrier services. Owners may employ trainers and grooms full-time or part-time and may contract drivers to race their horse. For owners who are deeply involved in caring for their horse(s), ownership involves a significant amount of time and physical labour. For owners of larger operations, there may be hired hands to assist in keeping and training horses, and many hands-on owners, regardless of the size of their operation, have family and friends helping them with their horse(s). Horse ownership requires a great investment of time and money to care, train, and campaign a horse in PEI and throughout the Maritime provinces.

Owners regularly travel to tracks in Woodstock, NB and Truro, Inverness, and North Sydney, NS to participate in races. Transporting a horse(s) to such locations requires a truck and horse trailer. Owners regularly travel with their horses around Atlantic Canada during the May to October racing season, resulting in further travel-related expenses such as gas, bridge or ferry fare, meals, and accommodations. Additionally, owners must pay various fees and registration costs. These include membership fees for the various industry associations and numerous fees associated with making a horse eligible to race at various events each year, such as staking and eligibility fees.

In key informant interviews, owners reported that generally, a reasonable goal for horse ownership is to break even in terms of revenues and expenses. Owners hope to at the least recover the money they put into raising, training, and racing a horse, and – occasionally – may slightly profit from winnings and the eventual sale of the horse. Horse ownership is viewed as not lucrative enough to be an individual's sole source of income. Many owners have other employment or business, are retired, or run additional harness racing-related operations such as breeding and/or boarding. In interviewing standardbred owners, it is evident that love of the horses and of the industry is the driving factor behind standardbred ownership in PEI.

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> ”

As mentioned, there has recently been a notable rise of fractional ownership in the industry. Fractional ownership, where multiple people come together in a partnership or group to buy, keep, and campaign a horse, is becoming more common in PEI and more broadly throughout the industry. It allows people to buy a share of a horse – at times as low as 1% – and to divide purse earnings, monthly expenses, and any additional expenses with the rest of the horse's owners. This arrangement enables less financial risk through more deleveraged ownership. CBC News has reported that 15 to 20% of owners on PEI do so through fractional ownership.[8] Fractional ownership is a more affordable avenue to become a racehorse owner and has lowered one of the barriers to entry of standardbred ownership.

[8] N. Russell. (10 September 2024). "P.E.I. sharing program aims to make horse ownership more affordable." *CBC News*. https://www.cbc.ca/news/canada/prince-edward-island/pei-horse-owner-sharing-harness-racing-1.7317808#:~:text=For%20a%20couple%20of%20hundred,to%20get%20into%20the%20industry

2.1.1.2 Trainers

There are currently 132 active trainers on PEI who play a crucial role in the Island's harness racing industry.[9] After buying a horse with the intent of racing it, owners decide between either caring for and training the horse themselves or hiring a trainer to do it for them. Some owners do not have the time, knowledge, or skillset to train their own horses; conversely, other owners do not have the resources to hire a trainer. In some cases, a trainer may become involved with the owner before the horse is even purchased, assisting the (future) owner through the buying process during the annual yearling sale.

There are currently 132 active trainers on PEI who play a crucial role in the Island's harness racing industry.

Trainers are responsible for the daily care of the horses in addition to preparing them for their racing careers. Trainers listed relatively arduous daily tasks throughout interviews, such as feeding the horses three times per day, mucking their stalls, jogging the horse to ensure it receives adequate exercise, and frequently coordinating care from other professionals, such as veterinarians, dental specialists, and farriers. Trainers also emphasized the commitment required by the role, as the horses must be cared for every single day. It was also apparent that, as with most other industry participants, trainers become trainers due to their passion for the industry and not for the financial returns.

There is a wide range of standardbred training operations on PEI. Some trainers have other full-time jobs and must hire part-time staff to care for the horse throughout the day. Other trainers operate a single-person operation, being self-employed full-time. There are other operations where full-time trainers are responsible for twenty horses or more and hire full- and/or part-time employees. Some trainers have their own barn and will either transport the horses to a track for exercise or build their own track on their property. Alternatively, many trainers choose to rent stalls in a barn at a track such as the Charlottetown Driving Park, Summerside Raceway, or a matinee track. The fees for a trainer's services can vary; however, one interviewee reported that a typical daily fee for a trainer in PEI is generally between $32 and $42 per day, billed monthly.

Depending on whether a trainer has their own facilities or if they rent, they can incur many of the same expenses as breeders (discussed in Section 2.1.1.4). Daily care expenses can include hay, feed, straw, and bedding, in addition to the cost of labour. Trainers are also required to spend great amounts on capital expenditures. Throughout interviews with trainers, the importance of having a high-quality horse trailer was frequently emphasized, not only for transporting the horses to tracks but also in case of emergency, such as if a horse needed to be transported to the Atlantic Veterinary College (AVC) on short notice. Used horse trailers are very difficult to find in the Maritimes, with one trainer reporting to have searched for over a year and then eventually buying a brand new one for approximately $40,000. Another non-negotiable expense is a pickup truck, used to transport horse trailers and supplies. Trainers/drivers have their own jog carts and race bikes. While these are substantial purchases, the additional costs of building barns and tracks are far greater, which is why

[9] Data provided by Standardbred Canada.

becoming a trainer is typically a drawn-out process. Even for people who have the necessary industry experience, the infrastructure and equipment costs are impediments.

While trainers are permitted to drive the horses they train, they are prohibited from driving other horses in races that include horses they train. Some trainers will choose to drive their own horses, whereas others will hire a driver for races. One trainer reported having three or four drivers that they frequently cycle through.

When a horse is competing outside of PEI, the trainer will typically travel with the owner and the horses, in addition to the driver, if there is one, and occasionally the groom. Travel expenses like these are typically included in the trainer's monthly invoice to the owner. It was frequently shared throughout interviews with trainers and drivers that they are conscious of minimizing expenses for the horse owners and will, for example, travel in one vehicle and share accommodations if needed.

During a group interview, trainers discussed the current purse distribution in stake races between classes, with the group's consensus being that upper stake classes did not increase by as much as the lower stake classes. They felt that while this current structure has helped to prevent smaller operations from going out of business, the lower classifications are now much more desirable to be in, i.e., the less expensive horses have a more favourable revenue to cost ratio compared to the more expensive ones.

When asked about youth in the industry during a discussion with a group of trainers, it was observed that there is a large number of young participants within the industry; however, they said, there could always be more. Current trainers shared that it was less expensive to become a trainer when they did, with the cost of buying and keeping horses and transportation and fuel costs having been lower. They also shared that it is difficult for young people to make this their full-time job.

2.1.1.3 Drivers

PEI currently has 75 drivers registered with Standardbred Canada.[10] Drivers race either as trainer-drivers or catch-drivers. Trainer-drivers are, as the term suggests, drivers who are also the horse's trainer. Catch-drivers are drivers who drive on a per-race basis and are chosen by the owner or the trainer of the horse ahead of a race. Catch-drivers may have agreements or understandings with owners and trainers to be the primary driver of their horse(s), but otherwise, the driver is selected from who is available for a race and who the trainer feels would best suit their horse. The compensation for driving is usually 5% of what the horse makes in the race. This is especially so when the race's purse is a sizable amount of money. According to both owners and drivers, the *minimum* compensation range for drivers is typically between $20-$40 for a race.

> *"[I am] moving aside for the younger people coming up – lots of good young drivers around now."*
>
> Key Informant, 2024

Harness racing drivers have relatively standard upfront costs for their work. Most drivers have their own sulky (race bike), and multiple racing suits for different weather. They supply their own gloves and glasses, and their race bikes

[10] Data provided by Standardbred Canada.

have maintenance expenses throughout the year. This equipment – especially the suits, bikes, and bike wheels – can cost a driver thousands of dollars to acquire. Drivers also may travel with owners/trainers to off-Island stake races. However, the owner is responsible for the cost of travel and any accommodation required for the driver.

Key informants noted that they are seeing more young drivers registered and participating in races. Like in the other categories in the industry, increased participation by twenty- to thirty-year-olds is seen as a good sign for the sustainability of the industry. Some drivers who have been in the industry for forty to fifty years shared that they are intentionally driving less and leaving it to the younger drivers. However, while the industry is seeing diversity in drivers' ages, it is still not seeing diversity in drivers' genders. Drivers are predominantly male. Out of the 49 drivers listed on Red Shores' Drivers page, only one female driver is listed.[11] It was noted in interviews that there are still few women drivers despite their being an increase of women in other industry roles. One key informant even stated that it is a "tough industry for female drivers."

The next generation of drivers are being supported through youth harness racing programs and initiatives throughout the province of PEI but specifically at the matinee tracks. The matinee tracks have a solid track record of youth development for the industry. Kids as young as 12 participate in driving events, and the amateur races are an excellent training ground for young and new drivers to learn the skills of harness racing.

A good example of young driver development at the pari-mutuel tracks is the Gamester-Pinkney amateur driving series for licensed drivers under 30 who have fewer than 100 lifetime wins to their record. The Gamester-Pinkney Memorial Cup showcases young drivers and honours the legacy of Byron Gamester and Phil Pinkney who were strong supporters of youth development in the Maritime Industry. Youth participation in the pari-mutuel and amateur races is a signal of the continued passion of harness racing in PEI and Maritime youth.

> ***"We do have strong youth behind us in the industry.*** *This is a way to get these young kids involved, get them out on the track, learn the responsibilities about what's involved with being a driver and trainer and then learn to take care of your horse too."*
>
> Key Informants, 2024

A new initiative for developing young drivers is the interprovincial miniature horse races for youth aged fifteen and under.[12] Organized miniature horse races are a recent grassroots development in the Maritime provinces that allow children and young teens to get harness racing driving experience. The program, started by Kaitlyn Wesley, Laura Sliter, and Samantha Heffernan, is a training ground for potential drivers that allows participants to be actively engaged in the industry. What started with two or three youth drivers participating has grown into a group of twenty to thirty youth racing, most

[11] Red Shores. (nd). *Red Shores Drivers.* https://redshores.ca/racing/drivers/

[12] Prince Edward Island Harness Racing Industry Association. (n.d.). *PEI Harness Racing Industry Association 2023-2024 Government Funding Report.*

of whom are from PEI. These participants are of all genders and are obtaining invaluable experience in racing and looking after horses.

The hope of the industry is that, through these various programs and initiatives, these children and young people will remain in the harness racing industry and become the industry's next generation of drivers, trainers, and/or grooms.

2.1.1.4 Breeders

Breeders make up a large number of PEI's harness racing industry members, with there being 255 active breeders on the Island as of November 2024, registered with Standardbred Canada.[13] Breeders are vital to driving economic impact within the industry, as they produce the stock that will become the racehorses of future years. As with trainers, breeding operations can vary greatly in size, with some operations being passion projects that only have a couple of mares and no employees versus others which have highly invested in breeding stock and equipment, employ multiple full-time staff members, and whose horses sell for tens of thousands of dollars. No matter the size of the operation, the goal of every breeder is to produce quality racehorses through continuing to invest in good genetics and broodmares.

2.1.1.4.1 Establishing a Breeding Operation

To establish a breeding operation, breeders must gain access to a significant amount of land, which, as conveyed through stakeholder interviews, is expensive and challenging to find. A guideline many breeders follow is to purchase between one and a half to three acres of pasture land per broodmare. Current prices for pastureland on PEI range between $10,000 and $15,000 per acre and can vary depending on the size of the package it is being sold in. Stakeholders shared that they feel it is more economical to purchase existing farmland than it is to clear wooded acreage for their farms.

> *No matter the size of the operation, the **goal of every breeder is to produce quality racehorses** through continuing to invest in good genetics and broodmares.*

While establishing a new breeding operation, owners must use the services of many professionals and businesses. Beginning with buying the land, accountants, lawyers, real estate agents, government departments, surveyors, and bankers may all be engaged to facilitate the land transfer. Next, the land will be prepared, and the barn will be constructed. This will require plumbers, carpenters, electricians, landscapers, general labourers, and building supply companies. Finally, the breeder must purchase their equipment. This will have them interact with automobile and machinery dealerships, online equine supply stores, local stores, veterinary clinics for specialized equipment, and online or local horse dealers and auctioneers.

Once the land has been acquired, the most significant piece of required infrastructure, a primary barn, must be constructed. The size of the barn varies with the scale of the operation; each horse requires a stall. Stakeholders shared that 10'x10', 10'x12', or 12'x12' are typical dimensions for each stall within the barn; however, some breeders opt for larger stalls (one informant noted having stalls measuring 12' by 16'). Additional space must also be allocated for alleyways, with these typically

[13] Data provided by Standardbred Canada.

being 10' or 12' wide. While the cost of building these barns varies depending on the square footage, interviewees shared some examples. One stakeholder spent $130,000 on a barn measuring 36' by 55' in 2016. Another barn, measuring 60' by 40', was priced at $70,000 in materials, with labour likely doubling this amount (this barn was also built as an attachment to an existing building, which they estimated saved them over $10,000).

Many breeding operations will also build a run-in shed in their pastures, providing shelter to their animals during inclement weather. Fencing is another significant expense when establishing a breeding operation. Informants estimated fencing to cost approximately $2,000 per acre, with one stakeholder having stated that they were forced to use electric fencing due to the difference in cost from boarded fencing. There are multiple systems available for breeders to deliver water to their horses. One Island breeder uses a water post system that supplies water from below the frost line, preventing it from freezing. Other breeders use electrically heated water bowls and hoses.

Photo Credit: Atlantic Classic Yearling Sale

Equipment costs also comprise a large portion of the initial startup costs for a breeding operation; however, they can vary greatly depending on the size of the operation and individual circumstances. For instance, it is not mandatory for breeding operations to purchase a tractor, but most interviewees felt it necessary to have access to one. Some breeding operations are attached to larger farms they can borrow from, others look towards their neighbours, and some have their suppliers load items onto their trailers for them. Stakeholders estimated that tractors are approximately $1,000 per horsepower and that 60 to 70 horsepower is an ideal size; however, one breeder uses a 40-horsepower tractor and can do most things. One stakeholder felt that many people establishing a ten-mare breeding operation likely would not immediately purchase a tractor.

Interviewees emphasized the importance of having a half-ton pick-up truck, which, among other things, is used to tow trailers and haul equipment and supplies. Breeders must either buy hay or bale it. If they bale it and do not have storage space, they must purchase a bale wrapper to store it outdoors. Interviewees estimated the cost to purchase a bale wrapper to be approximately $50,000. Hay is priced at $50 for a round bale. Furthermore, many breeders purchase foal alert systems, which are magnetic devices that are placed inside mares-in-foal to alert breeders when a mare is foaling. While this system can be expensive, interviewees stated that there are provincial government program subsidies available to help offset the costs.

Breeders also may purchase breeding equipment from other PEI breeding farms. Additional equipment typically used by breeders is outlined in Table 2 for reference.

Table 2. Additional equipment typically used by breeders.

Equipment	Used to
Breeding Mount & AV	Collect semen from stallions.
Centrifuge	Prepare semen.
Semen Shipping Boxes	Transport semen.
Broadcaster	Spread fertilizer.
Manure spreader	Spread manure.
Bush hog or hay mower	Clear brush.
Snowblower	Remove snow from fields, paths, driveways, etc.
Horse trailer	Transport horses.
Milker	Collect milk from broodmares.
Refractor	Test the quality of the broodmares' milk.
16-foot flat wagon	Transport hay and other supplies.
Cameras	Monitor and keep the animals secure.
Donor Colostrum	Give to newborn foals if they are unable to nurse.
General Farm Equipment	e.g., shovels, pitchforks, wheelbarrows, and brooms.

With the land prepared, infrastructure in place, and equipment purchased, breeders can purchase their broodmares. Broodmares can vary significantly in price depending on a variety of factors. An older broodmare with fewer remaining breeding cycles may be purchased for as low as $10,000. Informants shared that the upper average for broodmares purchased by PEI breeders is approximately $25,000. These broodmares are generally purchased through two websites, both of which are based outside of PEI. It was also shared that many people get into horse breeding because they own a retired racehorse, which eliminates this expense from their start-up costs.

Many breeders do not keep their own stallions and instead purchase semen from studs either in PEI or from outside jurisdictions to artificially inseminate their broodmares. Stallions are generally more expensive than broodmares, and key informants estimated that stallions sell for between $25,000 and $50,000. Each stud is used to breed 60 to 70 broodmares; however, it generally takes two or three attempts at breeding before a mare becomes in foal. While some breeders transport their stallions to the Atlantic Veterinary College in Charlottetown to have semen collected, others collect semen from their stallions themselves using specialized equipment. This equipment, among other things, includes a breeding mount, boot (i.e., an equine artificial vagina), lubricants, and a spectrophotometer used to measure the concentration of sperm. The process for semen collection also usually involves a mare present in the room, but otherwise, stallions must be kept separately from the mares, meaning that additional infrastructure is required if both are kept, such as another run-in shed.

While some breeders choose to keep their own stallions, and others choose to purchase semen from stud owners, a third option is to purchase shares in a syndicated stallion. Stallions can be syndicated, allowing multiple people to share ownership, with each owner sharing profits and losses and holding pre-determined breeding rights. While this is rare in PEI, one key informant shared that they own shares in a syndicated stallion housed in Ontario.

Not all breeding operations have employees. The hiring of employees is primarily determined by the size of the operation and the level of involvement from the owner. Many stakeholders felt having someone work full-time in the operation was essential, but this could be either the owner or a hired employee. One stakeholder shared that they hire a full-time employee for the Spring when they are most busy and a couple of part-time employees during the slower months. They shared that these employees have been paid between $18 and $20 per hour and that most of them have been contractors. Informants also shared that almost all breeders need help during the annual sale in October, with some paying employees and others relying on friends, family, or volunteers.

2.1.1.4.2 Operating a Breeding Farm

Breeders have routine duties that are consistent across the entire year. This includes mucking stalls, feeding, watering, bedding yearlings, yearling preparation for sales, and general maintenance. A farrier will routinely trim the horse's hooves approximately every eight weeks. The horses are also dewormed twice yearly, with one stakeholder stating that he does it when they go outdoors in the spring and again in the fall when they come back inside.

November and December are quieter months, with the Atlantic Classic Yearling Sale been held in October. A veterinarian will come to the farm and evaluate the herd's health and determine which broodmares are in foal and which are not. Some breeders choose to place their broodmares under lights beginning in December, meant to bring the mares' first ovulation earlier in the year, allowing them to be bred sooner. Also in December, breeders ordering semen from off-Island jurisdictions (which approximately one-third of Island breeders do) must choose which stud they are going to use. They must then be approved by the stud's owner, requiring them to submit a breeding contract that contains extensive information on the mare's history.

January to mid-March remains a slower time of year for Island breeders. Throughout key informant interviews, it was frequently stated that breeders prefer foals not to come until spring when they have more space in pastures to exercise. However, foals may begin to come during this period, which can be an additional challenge for the breeder. One stakeholder has begun sending these early foals to warmer climates should they come during the winter months. Another major duty during this period is clearing snow, including from fields, to allow the horses to go outside. Finally, breeders spend much time researching stallions and watching sales to see which horses are selling well.

Late March through June is the busiest time of the year as both foaling and breeding begins. Beginning at the start of April, a veterinarian will visit on Mondays, Wednesdays, and Fridays until the end of May, when visits taper to once per week. It is also more common for breeders to hire additional help during this period to assist in managing the added duties. Unlike breeders using studs from Ontario, local studs can be chosen on shorter notice, meaning the two-thirds of breeders who use local studs make their decision in March. With the stud chosen and semen arriving from out-of-province or locally, mare insemination begins. Some breeders do this themselves, while others use their veterinarian. Prior to foals being born, veterinarians will insert foal alert transmitters into the mares to alert the breeders when a mare is foaling. In addition to routine maintenance and upkeep, daily checks of the horses will occur, looking for injuries, horses not eating, or broodmares dripping milk. Many breeders will also fertilize and their fields during this time. Finally, when the ground dries in the late spring, yearlings may be castrated.

As the summer arrives in July, breeders stop breeding their mares, and mares stop foaling. The horses will be outdoors exercising in the pastures. When the newborn foals reach two months old, they will be microchipped for identification, a service included in breeders' Standardbred Canada membership. In preparation for the annual sale in October, breeders will spend more time handling their yearlings, allowing them to become comfortable with humans. During this time, there are frequent farm upkeep and maintenance requirements to prepare for the winter months.

In October, the Atlantic Classic Yearling Sale becomes the breeders' primary focus. Breeders will spend approximately $600 on each yearling to prepare them for the sale, which can include the purchase of new halters, transportation costs, and liability insurance. Some yearlings also require tranquillizers to transport them to the sale. Stakeholders shared that the average sale price for a yearling at the sale is between $13,500 and $15,000. Following the sale, foals are weaned from the mares, and manure is spread on the fields. Finally, a veterinarian will determine which mares are in foal and which are not, and the cycle begins anew.

In addition to all the activities outlined above, it should be noted that is increasingly common for off-Island resident to board mares on PEI. PEI saw an increase in the number of resident mares from 34 in 2022 to 49 in 2023. These mares generate additional economic activity in the sector as many of the same activities and expenses involved in boarding these mares occur within the province.

2.1.2 Industry Partners, Associations, and Oversight

2.1.2.1 Standardbred Canada

Standardbred Canada is the national organization for Canada's harness racing industry. It helps connect, inform, and record all things harness racing in Canada. Standardbred Canada manages memberships, records race information and results, handles purse payments, and supervises the registration of standardbreds. It currently has 6,530 active members.

> *"Standardbred Canada is an incorporated non-profit organization whose mandate is to supervise, record, store and distribute information on all registered Standardbreds and to promote harness racing in Canada and beyond."*[14]

Standardbred Canada was created in 1998 and has racetrack field representatives from across the country recording and sharing racing data. Standardbred Canada also keeps detailed information about each registered Canadian standardbred that can be easily accessed by its members. The organization provides its licensed members access to a standardized insurance plan and operates the official publication for Canada's standardbred industry, *TROT Magazine*. The organization retains employees that run the operations and services of the organization.

2.1.2.2 The Prince Edward Island Harness Racing Industry Association (PEIHRIA)

The Prince Edward Island Harness Racing Industry Association is the umbrella organization supporting and promoting the harness racing industry on PEI. PEIHRIA advocates for the industry with government, and it takes a leading role in organizing industry events.

[14] Standardbred Canada. (nd). *About Standardbred Canada.* https://standardbredcanada.ca/content/about-standardbred-canada.html

PEIHRIA is led by a Board of Directors representing various aspects of the harness racing industry, and the association has numerous committees that focus on different elements of industry operation and development. Formed in 1999, PEIHRIA seeks to provide a unified voice for the industry. Its membership is composed of the following member organizations:

- PEI Standardbred Horse Owners Association
- Prince County Horsemen's Club
- Atlantic Standardbred Breeders Association
- Maritime Breeders Association
- PEI Standardbred Breeders Association
- Red Shores Racetrack and Casino at Charlottetown Driving Park
- Red Shores Summerside Raceway

> *"The mission of the PEIHRIA is to establish and perpetuate the financial stability and future viability of the Harness Racing Industry on Prince Edward Island."*
>
> PEI Harness Racing Industry Association

The organization's operations are carried out by an Executive Director and support staff based in Charlottetown, PE. The general goal of PEIHRIA is to unite the different industry participants and organizations on PEI in order to promote and advocate for the participants and the industry provincially, regionally, and nationally.

PEIHRIA works together with other national and provincial associations across Canada to support harness racing on a larger stage, and it specifically works with other organizations in the Maritime provinces to preserve and grow the industry in the region.[15] PEIHRIA is also responsible for various industry initiatives including managing stake races, overseeing and executing the Atlantic Classic Yearling Sale, and contributing to the purse pool on Prince Edward Island. It also oversees and supports other industry events and programs and provides scholarships and awards.[16]

2.1.2.3 Atlantic Standardbred Breeders, the Maritime Breeders Association, and PEI Standardbred Breeders Association

Atlantic Standardbred Breeders is the regional association that promotes Atlantic Canadian horses, and it supports and advocates for breeders in the industry.[17] The Maritime Breeders Association is composed of standardbred stallion owners in Prince Edward Island, Nova Scotia, and New Brunswick.[18] The PEI Standardbred Breeders Association is the oldest breeders organization in North America having been founded in 1934. There is overlap in membership for these three associations.

2.1.2.4 PEI Standardbred Horse Owners Association (PEISHOA)

PEI Standardbred Horse Owners Association has between 250 and 300 members (note: some individual members are representatives of stables and ownership groups). PEISHOA is based in Charlottetown, PE and provides practical support to horsepeople in PEI to assist them in navigating

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[15] PEI Harness Racing Industry Association. (nd). *About*. https://www.peiharnessracing.ca/about/
[16] PEI Harnes Racing Industry Association. (2024). *PEI Harness Racing Industry Association 2023-2024 Government Funding Report*.
[17] Atlantic Sires Stakes. (nd). *History.* https://www.atlanticsiresstakes.ca/history/
[18] Maritime Breeders Association. (nd). https://www.facebook.com/homehardwaremaritimebreedersstake/

the industry. The association is volunteer-driven and covers its costs mainly through membership fees, sponsorships, and fundraisers. The practical support provided by the PEISHOA has included buying and maintaining a golf cart for the track, arranging gifts or acts in-memoriam on behalf of its members, and hosting an annual gala to celebrate and recognize members' work. The association also helps its members understand rule changes in the industry and acts as a voice to share industry needs. PEISHOA is involved in supporting youth and others entering the industry and has done so financially through sponsorship and training bursaries. While their name states that the association is for horse owners, membership includes other participants in the industry as well. The PEISHOA board is made up of twelve directors from different aspects of the industry; typically the board consists of a directorship made up of two-thirds horse owners and one-third drivers and trainers.

2.1.2.5 Prince County Horsemen's Club (PCHC)

Prince County Horsemen's Club currently has membership of approximately 200 people. Like PEISHOA, PCHC offers practical support for its member community. PCHC manages the Summerside Raceway track and barns – property owned by the City of Summerside but operated and maintained by PCHC – with the intent for the Summerside Raceway to continue to be a place of community and family-friendliness. PCHC's volunteer directors and active members are the boots-on-the-ground workers who support harness racing in Prince County.

2.1.2.6 Atlantic Provinces Harness Racing Commission (APHRC)

The Maritime Provinces Harness Racing Commission was formed in 1994 and became the Atlantic Provinces Harness Racing Commission ("the Commission") in 2015 with the inclusion of Newfoundland. Since its inception in 1994, the Commission has been the regulatory authority for its jurisdiction. It is empowered by the *Atlantic Provinces Harness Racing Commission Act* (*APHRC Act*), which governs the ability of the Commission to establish the rules of standardbred racing, including such items as licensing requirements for drivers, trainers, grooms, owners, race officials, and other items overseeing pari-mutuel racing and tracks. The *APHRC Act* also empowers the Commission to regulate in the case of any rule violations, to adjudicate when a violation occurs, and to impose appropriate sanctions.

As the regulatory body for harness racing in the Atlantic Provinces, each province nominates two commissioners to sit on the Commission. The *APHRC Act* is an identical piece of legislation in each of the Atlantic Provinces but must be approved through each province's legislative process. Newfoundland recently rescinded their *APRHC Act* in March 2024. Because of the cross-referencing of the *Act*s in the other three provinces, this rescission has led to difficulty conducting business – per the legislation, a quorum cannot be met without Newfoundland's representation. Thus, the APHRC is currently navigating a period of uncertainty.

In terms of employment, the APRHC has two full-time staff, both based in PEI: the Director of Racing and an Administrative Assistant/Financial Officer. To conduct a race meet, three racing judges are required for every race card, of which there are 111 in PEI. These three racing judges are drawn from a roster of seven employees. There are additional officials required by the *APHRC Act* to conduct a race meet, including a paddock judge, starter, driver, race secretary, Standardbred Canada representative, and race office staff. These additional officials are provided by Red Shores.

The APHRC partners with the Canadian Pari-Mutuel Agency (CPMA) in an equine medication control program. The CPMA an operating agency within Agriculture and Agri-Food Canada that federally regulates and supervises pari-mutuel betting on horse races (and is further discussed in Section 2.1.2.8).[19] Sample collection for tests within the equine medication control program are contracted to a company called Racing Forensics. This involves approximately six to eight individuals (four per race card) who collect samples. On average, 1.5 tests are conducted per race, resulting in approximately 2,400 samples each year sent to Burnaby, BC for testing. Out of these 2,400 tests, there may be three or four per year found to be non-compliant. Upon receipt of a certificate of positive analysis (i.e., a non-compliant test), the APHRC will initiate an investigative process, hold hearings, and apply appropriate sanctions. There is also total carbon dioxide, or TCO_2, testing, contracted to veterinary technicians. TCO_2 testing is performed by blood sampling to detect the administering of alkalizing agents, intended to unfairly advantage a horse by delaying the onset of fatigue.[20] TCO_2 test samples are analyzed at the AVC in Charlottetown.

The APHRC receives funding through an operational grant from the Council of Atlantic Premiers (based on the pari-mutuel wager for the prior year), and generates revenue through providing officials for pari-mutuel races and collecting membership dues. An additional source of revenue comes from fines levied for drug violations in equine medication program. The APHRC plays an important role in the Island's harness racing industry through ensuring the fairness of pari-mutuel races and through maintaining the professionalization of the industry.

2.1.2.7 Atlantic Lottery Corporation, PEI Lotteries Commission, Government of PEI

As shown in Figure 1, pari-mutuel gaming related to harness racing on PEI is regulated by the Atlantic Lottery Corporation (ALC), an agent of the PEI Lotteries Commission (PEILC), which in turn acts on behalf of the Government of PEI.[21] Incorporated in 1976, ALC has been delegated the duties of developing, organizing, undertaking, conducting, and managing lottery schemes and pari-mutuel betting systems. ALC is owned by the four Atlantic Canadian Provinces, with PEILC being the shareholder for PEI. ALC abides by the regulations set out by each province's legislation, with regulations on PEI stemming from the *Lotteries Commission Act*.

Atlantic Lottery has a board of directors made up of independent and non-independent directors from each province. PEI has two independent directors on the board who are currently serving six-year terms: Shaun MacIsaac, Chair of the Audit & Risk Committee, and Gordon MacFarlane, Chair of the Social Responsibility and Sustainability Committee. PEI's non-independent Director is Denise Lewis Fleming, PEI's Deputy Minister of Finance.

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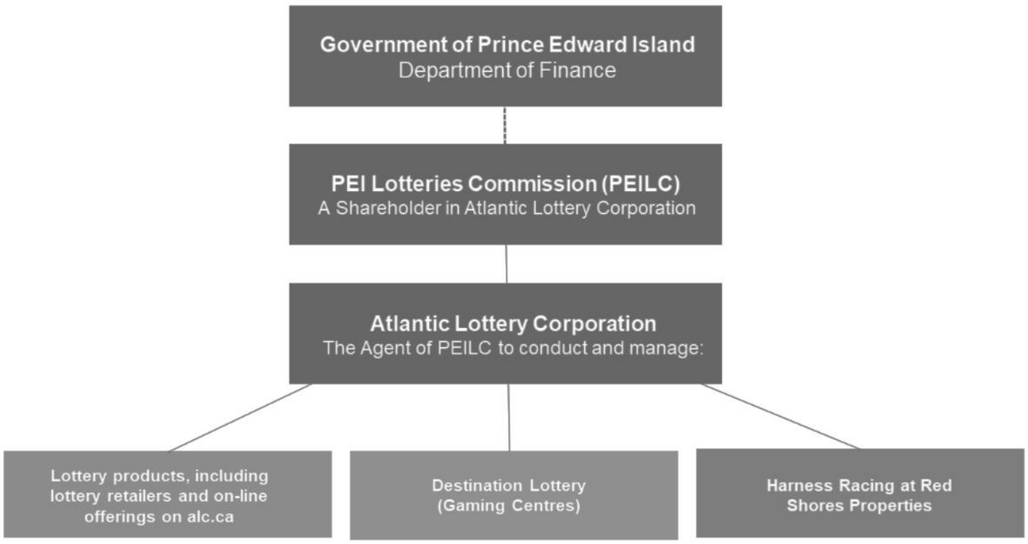
[19] Government of Canada. (nd). *Canadian Pari-Mutuel Agency.* https://agriculture.canada.ca/en/department/partners-agencies/canadian-pari-mutuel

[20] L. Dirikolu, P. Waller, K. Malveaux, C.H. Lucas, I. Lomnicka, A. Pourciau, H. Bennadji, C. Liu. (2023). "Total Carbon Dioxide (TCO2) Concentrations in Thoroughbred and Quarter Racehorses in Louisiana." *Journal of Equine Veterinary Science,* Volume 121. https://doi.org/10.1016/j.jevs.2023.104220.

[21] Government of Prince Edward Island, Department of Finance, PEI Lotteries Commission. (2024). *2023-24 Annual Report*. https://www.princeedwardisland.ca/sites/default/files/publications/lotteries_2023-2024_0.pdf

Figure 1. Regulatory Structure of PEI's Lottery and Gaming Offerings (Province of Prince Edward Island)



PEILC significantly supports the harness racing industry in PEI. In the 2023-24 fiscal year, PEILC provided funding in the amount of $3.438 million to the PEI Harness Racing Industry Association to increase the sustainability of the industry and fuel its contributions to the provincial economy.

Government support was frequently praised throughout stakeholder interviews and was seen as a major contributor to the success of PEI's harness racing industry. Specifically, funding targeted to increase purse sizes was seen as a major differentiator between PEI and other Maritime tracks, which do not receive the same level of governmental support and have significantly smaller total purse sizes. As discussed in Section 2.1.3.4, these supports have increased PEI's race purses far beyond the other Maritime tracks, adding stability to PEI's harness racing industry.

2.1.2.8 Canadian Pari-Mutuel Agency

The Canadian Pari-Mutuel Agency (CPMA) is an agency within Agriculture and Agri-Food Canada that regulates and supervises pari-mutuel betting on horse racing in Canada. This agency's regulatory framework protects the public and ensures pari-mutuel betting is conducted fairly in Canada.[22] CPMA employs approximately thirty staff members across Canada, including Quebec, Alberta, and British Columbia, and has a laboratory in Ottawa, ON and a research centre near Hamilton, ON. Additionally, CPMA uses many contractors, including for most of its chemists.

In achieving its mission, CPMA provides multiple services. CPMA is responsible for administering permits, licenses, and authorization to approximately 3,000 racetracks and betting theatre operators across Canada, allowing them to conduct pari-mutuel betting. It also conducts audits and monitors and enforces pari-mutuel betting regulations. Finally, it tests horses through the Equine

[22] Government of Canada. (2024). Canadian Parimutuel Agency. https://agriculture.canada.ca/en/department/partners-agencies/canadian-pari-mutuel

Drug Control Program, deterring the use of prohibited substances while also providing information on the use of approved medication – done in the Atlantic Provinces in partnership with the APHRC as discussed in Section 2.1.2.6.[23]

CPMA is funded through a 0.8% levy on each pari-mutuel bet placed in Canada, which, in 2023, amounted to over $8.9 million in revenue. For expenses not covered by this levy revenue, the agency relies on Agriculture and Agri-Food Canada. As shown in CPMA's financial statements, 70% of the total pari-mutuel levy collected by the agency came from a singular racetrack, Woodbine Mohawk Park in Toronto, ON (which is the largest racetrack in Canada by purse size, pari-mutuel wager, and number of races).

During the stakeholder engagement process, an executive of CPMA was interviewed. They shared that the levy collected from parimutuel betting on PEI does not cover CPMA's operating costs for its programming on the Island. These operating costs include expenses for the testing they carry out – testing an average of 25,000 samples per year—and the compensation for the sample collectors they contract for the various races on PEI. Blood and urinary samples are required to complete their tests and determine horses' compliance with the industry's drug regulations. This testing is critical to maintaining fairness and transparency in competitions.

2.1.3 Racetracks and Race Schedule

2.1.3.1 Red Shores

Red Shores, which is owned by the Atlantic Lottery Corporation, is a premier entertainment provider offering casino games, dining experiences, and live and simulcasted harness racing across its two locations. Red Shores generates large economic impacts for the provincial economy due to its high levels of operational and capital expenditures, gaming revenue, and its locations directly employing over 265 staff members. Red Shores works closely with the PEIHRIA on various initiatives, with Red Shores assisting in the development of PEIHRIA's marketing and operational plans and customer-facing and export aspects, which work towards expanding PEI's harness racing industry.

With Red Shores being such a large operation, it generates significant economic spinoffs through its operational purchases. Red Shores orders large amounts of supplies from local companies, including food, materials, and race programs and spends large amounts of money on contractors, including its simulcasting contract. Red Shores also invests large amounts of resources into capital expenditures, ensuring its buildings, tracks, and casinos can accommodate its growing demand. Major capital expenditures over past years have included new barns, a new building which is used as a security command centre, other security features such as cameras and fences, new fleet vehicles, an upgraded paddock and shipping area, two new starting gates, and annual maintenance and upgrades to the racetrack. These capital expenditures have large, positive impacts on the Island's economy, with Red Shores prioritizing buying locally whenever possible.

During key-informant interviews for this project, executives from Red Shores and Atlantic Lottery Corporation stated that Red Shores would not have nearly the same level of success without its harness racing component. They stated that harness racing is a major driver for bringing people to

[23] ibid

the casino and that there is a significant increase in activity on race nights, so much so that the number of staff nearly doubles on race nights to accommodate the extra clients and racing fans. Interviewees from Red Shores also said that it is impossible to separate the economic impacts of harness racing from the rest of its operations as racing is so deeply intertwined with the rest of the business. Without harness racing, Red Shores would not generate anywhere near the same level of economic impacts and may not even exist.

The Charlottetown Driving Park, which is now also owned by Atlantic Lottery Corporation, was first opened for standardbred racing in October 1889. When first constructed, the facilities included its oval track, a two-storey grandstand, and the Judges' Stand, which still stands today. The Judges' Stand, which is a registered historic place, is the oldest freestanding judges' stand in Canada. In 1999, the Judges' Stand was restored and is now rented out on race nights for corporate and other special events. While the original grandstand was destroyed during Hurricane Juan in 2003, it was replaced and upgraded with what is now known as Red Shores Racetrack and Casino.[24]

Red Shores Racetrack & Casino, Red Shores' Charlottetown property, is the larger of the two Red Shores properties and is home to the Gold Cup & Saucer each August. These races draw large amounts of spectators, with the 2024 Gold Cup & Saucer having had over 20,000 fans in attendance.[25] The Charlottetown Red Shores location has three dining areas and a casino with over 200 video lottery terminals (VLTs) in addition to table games.

Red Shores at Summerside has many of the same offerings as its Charlottetown location but on a slightly smaller scale. This location has recently been renovated and now has a gaming floor with 30 VLTs. The Summerside location has a restaurant, the West End Bar & Grill, which offers a wide range of casual food and drinks. The Summerside Raceway, which is owned by the City of Summerside and leased by the Prince County Horsemen's Club, is claimed to be the oldest continuously raced horse track in Canada, having been established in 1886. This location hosts the Governor's Plate Race Week every July.

Red Shores is seeing growth in the number of guests visiting its locations and is expanding its facilities to accommodate this increase. One such example is the current renovation underway at its Charlottetown location, which is its largest expansion since it opened in 2005. This 8,000 square foot interior expansion involves the construction of a new entrance and additional responsible gaming measures also being added. An earlier stage of this project included adding its third restaurant, O'Brien's Social Bar & Kitchen, which pays homage to Hall of Fame horseman Joe O'Brien.

In the 2024 fiscal year, Red Shores generated over $23.3 million in revenue, an increase of 5.8% from the previous year. As noted in Section 2.1.2.7, since ALC, which owns Red Shores, is an agent of the Atlantic provincial governments, all profits are dispersed to fund government services, programming, and infrastructure. In the 2024 fiscal year, $487 million in profit from ALC was returned

[24] Canada's Historic Places. (n.d.). *46 Kensington Road/Judges' Stand*. https://www.historicplaces.ca/en/rep-reg/place-lieu.aspx?id=5508

[25] Ross, S. (2024, August). *Covered Bridge wins Gold Cup and Saucer for 2nd year in a row*. CBC News. https://www.cbc.ca/news/canada/prince-edward-island/pei-gold-cup-and-saucer-race-1.7297779

to the Atlantic provinces, with $26.8 million of this staying in PEI, $151.2 million going to New Brunswick, and $161.7 million going to Nova Scotia.[26] Since Atlantic Lottery began in 1976, it has returned $12.4 billion in profit to the Atlantic Provinces, all of which is used to support infrastructure, programming, employment, and other essential services.

An advantage of Red Shores operating both the Summerside and Charlottetown locations is that they can coordinate race dates to ensure they do not conflict with one another, preventing scheduling conflicts for harness racing participants. This benefits every member of the industry, with owners, trainers, and drivers not having to choose between racing at one track or the other.

Red Shores is very connected to the Island community, having partnerships with many local organizations and sponsoring many Island groups. Some of these partnerships include Tourism PEI, the Tourism Industry Association of PEI, Meetings and Conventions PEI, Discover Charlottetown, and Discover PEI. Red Shores also has campaigns that tie harness racing into the Island's renowned culinary scene. The Atlantic Lottery Corporation sponsors over 100 community events each year, focusing on those that have important cultural, social, and economic impacts within the community.

Executives from Red Shores foresee harness racing to continue to bring people to the Island, especially horsepeople, with harness racing having become a part of PEI's fabric over its century of harness racing history. PEI has the highest quality infrastructure, attractive race purses, and a growing industry, all of which make it attractive for bringing in residents from other provinces.

2.1.3.2 Matinee Tracks

At a more introductory level than racing at Red Shores locations, matinee tracks serve as more of a training ground for horses and horsepeople alike. There are five matinee tracks in PEI: Alberton, Kensington, O'Leary, Pinette, and Tyne Valley; shown below in Figure 2. The public PEI Matinee Racing Program Facebook group describes the program as "an inexpensive afternoon of fresh air and fun for the whole family, up-close and personal to a fair-like amateur racing tradition that hasn't changed for a hundred years".[27] This reflects what we heard from the matinee track representatives we spoke to – matinee tracks call back to the early days when horses were raced up and down the

Figure 2. Map of Harness Racing Tracks in PEI. Matinee tracks are marked with blue pins.

[26] Atlantic Lottery Corporation. (n.d.). *Atlantic Lottery Annual Report 2023-2024*. https://annualreport.alc.ca/2024
[27] PEI Matinee Racing Program (nd). https://www.facebook.com/groups/374368899423820/about

sides of roads; they serve to carry on the tradition of the past hundred years. It was shared that the matinee program in PEI is the only one of its kind in Canada.

> *The multi-generational nature of the matinee tracks offers valuable teaching opportunities for the young driving looking to advance to the professional raceways.*

Not only do matinee tracks represent the deep history of Island harness racing, but at present, they meet a need not served by pari-mutuel races at either Red Shores location. Youth involvement is prevalent at matinee tracks, demonstrated by the young teenagers who drive and race. It is also a place for youth to become involved outside of racing, whether this be by training, grooming, feeding – generally looking after the horses—or by volunteering for various jobs at matinee track events. Older folks are also involved; there are some retirees who want to continue their involvement with horses in a more casual atmosphere. With this combined participation by youth who are trying to move to the raceway level and by retirees who have been there, the multi-generational nature of the matinee tracks offers valuable teaching opportunities for the younger participants looking to advance to the professional raceways. There is a general sense of community at these tracks. Due to limited funding and revenue generation opportunities, the tracks and owners typically do not have hired hands. Instead, it was shared that "everybody helps everybody". There are key contributors at these tracks. It was shared by one interviewee that the Pinette Raceway would not exist without Raymond White, who "practically lives there". His family volunteers to support his passion. There is hope that when the time comes that Mr. White needs to step back, there is another passionate volunteer who can coordinate and continue to support the grassroots efforts required to run tracks like Pinette.

For the horses themselves, matinee tracks are an important training and proving ground. Racing at matinee tracks allows these horses to become accustomed to being transported to races, being stabled, racing in front of smaller crowds, and competing against other young horses. Particularly for the two-year-olds, winning matinee races and ultimately competing in the Matinee Racing Finals is a demonstration of season-long improvement facilitated by competing at matinee tracks.

Infrastructure and amenities available at matinee tracks vary by track. Pinette, for example, has two large barns and a grandstand, whereas Tyne Valley has larger barns but no grandstand. At Pinette, a canteen is operated on race days. Maintenance expenses involve grass cutting, applying rock dust to the track, fuel, water utilities, electricity, insurance, garbage removal, manure removal from barns, minor building repairs, equipment maintenance, and snow removal. These expenses to the tracks support nearby small business. For example, the Kensington Matinee track has the the Kensington Co-op as their preferred destination for hardware, chain links, and snacks; KMP Welding supplies rebar for the Kensington track; and Coopers Red and White stocks gasoline, canteen supplies, and items required for horses that stay in the barn.

Generally, races at Pinette can bring in between 100 and 200 patrons on a race day; for special events, there may be around 600 patrons. Revenues at matinee tracks are generated through various sources: government funding, low-price admission charges (e.g., two dollars), and stall rent in onsite barns (if applicable). There are different stabling arrangements throughout the tracks. For example, in Kensington, there is one sixteen-stall barn owned by the track and two private barns (with a total of twelve stalls) owned privately. Privately-owned barns generate revenue for the track through track rentals and manure removal fees. A similar arrangement exists in Pinette, with some track-owned barns that generate stall rental fees and a privately owned barn that generates track rental fees.

There are, however, difficulties facing matinee tracks. With the rising costs of keeping horses, many owners instead opt to focus on raceway horses versus matinee horses. This in turn reduces the regularity of race nights. However, it is important to note that even with the reduced participation and regularity of matinee races, industry participants broadly recognize the importance of matinee tracks and continue to support the developmental role they play. Representatives of matinee tracks that we spoke to specifically noted the importance of operational support provided by the PEIHRIA, Red Shores, and the Government of PEI.

Overall, matinee tracks play an important role in the Island's harness racing industry. They are a training and proving ground for young people and young horses who are looking to eventually compete at the highest level, on- and off-Island.

2.1.3.3 Racing Season Overview

Harness racing is split into two overarching categories: pacing and trotting. Standardbred horses have a natural gait, which will either be pacing or trotting, and this determines which category they will enter. Pacers move the front and back legs on the same side in tandem and account for approximately 80% of all standardbred horses. Trotters move their front and back legs on opposite sides at the same time during their gait; for example, their front left and back right will extend together, then their front right and back left.

The racing season in the Maritime provinces sees the majority of races taking place on PEI, but races also take place in Nova Scotia and New Brunswick. Stake races require horses to be Maritime foaled or Atlantic sired. To be eligible for these stake races, a foal must be the offspring of a mare bred to an eligible stallion, and the owner of the foal is required to pay nominating and sustaining fees prior to racing the horse as a two- or three-year old. In addition to the two tracks on PEI, Charlottetown Driving Park and Summerside Raceway, four other tracks in Atlantic Canada host stake races throughout the season, including Truro Raceway, Inverness Raceway, Northside Downs, and Woodstock Raceway. The Maritime stake races are divided into various categories as listed in Table 3 on the following page.

Table 3. Maritime stake race cards in 2024.

Category	Number of stake race cards in 2024
Two-year-old pacing fillies	17
Two-year-old pacing colts	17
Two-year-old trotters	15
Three-year-old pacing fillies	22
Three-year-old pacing colts	20
Three-year-old trotters	14
Invitational	16
Aged pacing mares	10
Aged trotters	7
PEI Colt Stakes Graduate Series	6

A major circuit in Atlantic Canada is the Atlantic Sires Stakes, which is a series of stake races held across tracks within PEI and Nova Scotia. To be eligible for these races, the racehorse must be sired by a stallion paid into the Atlantic Sires Stakes program. In this past year, there were 26 registered stallions across the Maritimes and 517 race-eligible horses. In addition to the continuous stake payments, there is also an entry fee for each race that the horse enters. Points are given out in each race throughout the season, with the season ending in a championship race for the top eight-point earners from each category. The purse structure for these races is derived from sustaining and nominating fees, host track contributions, starting fees, and provincial funding from Prince Edward Island and Nova Scotia. While purse distribution can differ slightly between stake races, all Atlantic Sire Stakes races have the following purse distribution:

Table 4. Purse distribution based on number of starters in Atlantic Sire Stakes races.

Number of Starters	Result				
	1st	2nd	3rd	4th	5th
5+	45%	25%	15%	10%	5%
4	50%	25%	15%	10%	
3	50%	30%	20%		
2	60%	40%			

Of this amount, for a typical stake race, local drivers will typically charge 5% of what the horse earns. For overnight races, the driver will typically charge a flat rate but may also receive a bonus if they place well.

2.1.3.4 PEI

Harness racing has a large presence in PEI, with the Island now having more horses per capita than any other jurisdiction in North America.[28] It is also a major tourist attraction and a significant part of the Island's culture. PEI has become the center of harness racing in the Maritimes. This is largely

[28] Standardbred Canada. (2020, October). *'Let's Talk Horses' On The Island*. https://standardbredcanada.ca/notices/10-13-20/info-let-s-talk-horses.html

due to PEI's attractive purse sizes and structure, which are more attractive than those of the other Maritime provinces. PEI's increased purse size is credited to government subsidies in recent years, which have been a major source of support for the industry. While the per race purses are similar in PEI to the other Atlantic Canadian racetracks, PEI hosts a higher number of races per year, meaning that the absolute purse distributed through PEI races is significantly higher than in other Atlantic jurisdictions. In 2023, the Charlottetown Driving Park held a total of 1,026 pari-mutuel races —including both overnight and stake races— and the Summerside Raceway held 356, compared to a total of 679 races among the other four Maritime tracks combined. This is also demonstrated in the purse per horse figure calculated in the table below by Standardbred Canada, which is the total purse divided by the number of unique horses, with Charlottetown's figure being $5,759 compared to an average of $2,414 among the other five Maritime tracks.[29] This is one more indication of the high level of economic activity in the industry in PEI relative to its neighbouring provinces.

Harness racing has a large presence in PEI, with the Island now having more horses per capita than any other jurisdiction in North America.

Table 5. Key figures of Maritime racetracks for 2023 from Standardbred Canada. Total race numbers include overnight and stake races.

Province	Track	# of Races	Purse per race	Purse per horse	Total Purse
NB	Woodstock Raceway	62	$4,670	$2,656	$289,550
NS	Inverness Raceway	191	$2,049	$1,928	$391,360
NS	Northside Downs	234	$1,458	$2,420	$341,175
NS	Truro Raceway	192	$3,301	$2,209	$633,879
PEI	**Charlottetown Driving Park**	**1,026**	**$3,789**	**$5,759**	**$3,887,330**
PEI	**Summerside Raceway**	**356**	**$4,420**	**$2,856**	**$1,573,615**

2.1.3.5 Atlantic[30]

Apart from PEI's two tracks, there are four other active tracks in Atlantic Canada. New Brunswick has one active track, the Woodstock Driving Club. Nova Scotia has three: Inverness Raceway, Northside Downs in North Sydney, and Truro Raceway. Newfoundland and Labrador no longer has harness racing events, so the Atlantic industry is limited to the Maritime provinces. As shown above in Table 5, Nova Scotia has the second highest number of races and total purse size, with New Brunswick's industry diminishing and holding limited races. As explained in Appendix B – Findings from the Jurisdictional Scan, neither Nova Scotia nor New Brunswick has the same level of government support as PEI does. This is reflected in the smaller total purses and fewer races. Island

[29] Standardbred Canada. (2024). *SC National Racing Statistics, Annual Report,* January 1, 2023-December 31, 2023. https://standardbredcanada.ca/sites/default/files/2024-06/SC-National-Racing-Statistics-2023.pdf

[30] Standardbred Canada. (2024). *SC National Racing Statistics, Annual Report,* January 1, 2023-December 31, 2023. https://standardbredcanada.ca/sites/default/files/2024-06/SC-National-Racing-Statistics-2023.pdf

horses primarily travel to these provinces to participate in stake races which have higher purses than overnight races.

2.1.3.6 Broadcasting

Broadcasting allows harness races to be viewed online and at other casinos, enabling bettors at home or in other locations to place bets on harness races without physically being there. The broadcasting rights for harness racing in PEI are awarded through a competitive RFP process approximately every five years. Universum Media has been the provider since 2005.

Founded in 2004, Universum Media is the leading broadcasting provider in the Maritime region for harness racing and provides coverage for the six pari-mutuel tracks across the Maritimes and a track in Winnipeg, Manitoba. Universum Media got its start through broadcasting harness racing, which is where the company grew its human and technical capacity, enabling it to take on additional broadcasting opportunities, such as the Canada Winter Games and other national events. The company attributes its success to its beginnings in broadcasting harness races.

Universum has four to five employees working for each race in Charlottetown and three to four for each race in Summerside, in addition to on-air talent employed by Red Shores. For races at the tracks outside of PEI, Universum is able to operate the broadcast remotely and does not need to travel outside of PEI. For these remote broadcasts, Universum also uses a company in Ontario for the broadcast's graphics.

2.1.4 Other Industry Participants

2.1.4.1 Feed and Tack Stores

In speaking with Greenhawk Equestrian Sport and Phillips Agri Services, their relationship with the harness racing industry is a significant driver of business.

Greenhawk supplies equipment and supplements. It was estimated that harness racing comprises approximately 50% of Greenhawk's business. Items for sale include reins, head poles, harnesses, hoods, tires and tubes, whips, and gloves, among other items. They recently began offering supplements and electrolyte pastes. Greenhawk aims to be a one-stop shop for harness racing items. This is additionally supported from the industry's struggles in other Maritime provinces – now, stores elsewhere do not tend to carry the items many industry participants require, so people from New Brunswick and Nova Scotia tend to either purchase items when they are on the Island for a race, or order items online from Greenhawk. Greenhawk essentially aims to meet the needs of horsepeople in terms of equipment, supplements, and supplies.

Phillips Agri Services provides feed and more so care-related supplies. It was estimated that approximately 80% to 90% of their sales relate to the harness racing industry. Phillips supplies feed, bedding, buckets, forks, brooms, supplies, and supplements (though the supplements are more equestrian than harness racing). A major part of Phillips Agri Services' business is feed. They manufacture custom feeds. One observed trend is many owners now shifting to more refined, specific feed formulas that are targeted to racehorses. It was estimated that approximately 60% to 65% of the Island's harness racing industry is serviced by Phillips' feed sales.

2.1.4.2 Veterinarians

The AVC at the University of Prince Edward Island (UPEI) is another participant in the harness racing industry in PEI. The AVC provides veterinary services, including ambulatory and theriogenology (reproductive) services, to horses involved in the industry. Standardbred ambulatory services generate approximately $200,000 to $250,000 in fees for the AVC each year. Standardbred theriogenology services generate approximately $75,000 to $100,000 each year. The AVC typically provides specialized services and surgery, and is in competition with private vet clinics. Essentially, if a horse is extremely sick and cannot be managed on-farm, it is referred to the AVC.

Private veterinary clinics typically perform on-farm services such as preventative medicine, vaccinations, and disease investigation. There is significant coordination with the AVC in terms of testing services. While the AVC is typically focused on emergency care, this has created an opportunity for private vet clinics to expand their on-farm services. It was shared by the clinician we spoke to that standardbred services make up approximately 40% of their workload (from approximately 5% when the clinic first opened). It was also shared that the type of service provided to standardbreds depends on the phase of the season. From January to the middle of June, primary services include reproductive work such as mare ultra-sounding and understanding the mare's cycle. Colts may arrive throughout the year. Additional services include lameness and/or pre-purchase examinations.

2.1.4.3 Farriers

Farriers specialize in equine hoof care. Duties include trimming and balancing horse hooves and placing shoes on their hooves. In speaking with a farrier of 32 years, the costs of establishing a farrier operation include: brass, hammers, pinchers, cutters, anvils, stall jacks, hoof stands, and cork are all required for shoeing. Welding equipment, including acetylene and oxygen is also required. The total estimated cost to establish an operation is between $4,000 and $5,000.

A farrier's duties include trimming and shoeing racehorses to ensure that they are properly balanced for their gait. According to key informants, most Island-based farriers work full-time as farriers. The busiest time of the year is from March to September. One farrier we spoke to operates out of the Charlottetown Driving Park; there are five other farriers at the track. It was also shared that about 80% of farriers' work is on standardbreds in PEI.

The horse's owner is generally responsible for farrier fees. The typical cost for four shoes is $90 to $100; and between $100 to $115 for winter shoes, which last longer. Standardbred shoeing is usually performed every three weeks, though corked shoes may last up to five weeks.

Farriers play an important role in the industry, ensuring the hoof health of standardbreds. This specialization is also almost entirely dependent on the industry's health, supporting at least six track-based full-time workers.

2.1.5 Marquee Events

2.1.5.1 Gold Cup & Saucer; Old Home Week

The 65th running of the Gold Cup & Saucer took place in August 2024. "The fastest horses and the best drivers in all of Eastern Canada" take part in "one of the most prestigious races in harness racing" at each running.[31] The Gold Cup & Saucer draws participants and spectators from all across PEI and all over Canada and the United States. With the final taking place at midnight, there is a palatable buzz in the air as the horses and drivers compete for the trophy. Live racing takes place all week at the Charlottetown Driving Park, concurrent with Old Home Week.

Old Home Week is 10 days of family entertainment, agriculture, livestock exhibitions, and harness racing that is held at the Red Shores Racetrack and Casino and Eastlink Centre properties in Charlottetown each August. Old Home Week has a long and rich heritage dating back to 1888 and has now grown to welcome over 90,000 visitors in recent years. This exhibition is an opportunity for the Island's agriculture industry to be showcased and features many categories of livestock shows and horse competitions. This week of racing is a major draw for Old Home Week, with approximately 20,000 spectators having been in attendance for the title race in 2024.[32]

2.1.5.2 Governor's Plate; Summerside Lobster Carnival

The Governor's Plate is the largest racing event held at the Summerside Raceway and takes place each July. 2024 marked the 56th running of this event, with the final race having a purse of $35,000. 2024 also recorded record-high wagering figures, with a handle of just under $180,000, up from about $159,000 in 2023. Ron Matheson, trainer of 2024 Governor's Plate winner Twin B Tuffenuff, described the Governor's Plate as "the second-biggest race [in PEI], but it's really PEI's race…because it's horses from the Maritimes."[33]

The Summerside Lobster Carnival, held each Summer, attracts visitors from across Atlantic Canada to dine on fresh lobster while enjoying live entertainment and carnival rides. While this event was previously held in tandem with the Governor's plate race event, after its return following the COVID-19 pandemic, the two events have been held on separate weekends. This is primarily due to limitations on when the carnival rides are available as well as scheduling conflicts with other local events, such as the Cavendish Beach Music Festival. However, many stakeholders and past visitors still hope to see these two events become coordinated together again, with these attractions being mutually beneficial and driving increased traffic for both.

2.1.5.3 Atlantic Classic Yearling Sale

The Atlantic Classic Yearling Sale is a major event for the Island's harness racing industry and is the pinnacle of the breeding year. The sale takes place each October and attracts owners and breeders from across the region to buy and sell yearlings, with the vast majority of the yearlings in this sale being Maritime-sired. In 2024, only 17% of yearlings came from other jurisdictions (e.g., Ontario, Pennsylvania, or New York).

[31] https://redshores.ca/racing/gold-cup-saucer/
[32] Ross, S. (2024, August). *Covered Bridge wins Gold Cup and Saucer for 2nd year in a row*. CBC News. https://www.cbc.ca/news/canada/prince-edward-island/pei-gold-cup-and-saucer-race-1.7297779
[33] Simmonds, J. (2024, July). *Governor's Plate: Gilles Barrieau makes history in P.E.I.'s race*. Saltwire. https://www.saltwire.com/atlantic-canada/sports/governors-plate-gilles-barrieau-makes-history-in-peis-race-100981098/

In the 2024 sale, 149 yearlings were sold for gross sales of $1,740,000, equaling an average sales price of $11,678 per yearling, the fifth-highest average sale price in the event's history.[34] While this average is down slightly from 2023, it is still up significantly from earlier years. In both 2019 and 2020, gross sales were below $1,000,000. These high sales averages over recent years can be partially credited to the government support that the industry has received and are an indication of the confidence participants have in the industry's future.

Table 6. Key metrics from Atlantic Classic Yearling Sale from 2019 to 2024.

Year	Sold	Gross	Average
2024	**149**	**$1,740,000**	**$11,678**
2023	146	$1,898,500	$13,003
2022	126	$1,891,000	$15,007
2021	103	$1,739,400	$16,887
2020	64	$974,750	$15,722
2019	105	$958,800	$9,309

2.2 Off-Island Participants in PEI's Harness Racing Industry

2.2.1 Overview

As previously stated, Prince Edward Island is widely considered the centre of harness racing in the Maritime provinces since it has the most participants and the most events annually. Key informants reported that participants from the other Maritime provinces regularly travel to PEI throughout the racing season and that participants from elsewhere in Canada and the United States also travel to PEI for major races. These non-resident participants can generate significant economic activity while on PEI for harness racing, and their spending and travel habits are important to note when considering the Island industry's full economic impact.

According to Tourism PEI data, an estimated 4.2% of PEI's total overnight visitors and 2.1% of its same-day visitors reported going to a casino/racino while on PEI during the 2023/2024 season. This equates to roughly 59,181 visitors who came to PEI and prioritized going to Red Shores and the Charlottetown Driving Park or Summerside Raceway. However, the off-Island horsepeople who regularly travel to PEI come first-and-foremost because of harness racing, and their economic impact while on PEI can be 100% attributed to the industry.

MRSB conducted an online survey of **off-Island horsepeople who visit PEI for harness racing**. The survey targeted both participants and spectators who come to PEI for the primary purpose of participating in harness racing. The following information is a summary of the survey methodology and results.

After cleaning the survey responses and eliminating non-eligible participants and substantially incomplete responses, there was a total of 230 respondents. Not all of these respondents answered all survey questions. The totals and percentages in the tables below indicate the number of

[34] Standardbred Canada. (2024, October). *Saulsbrook Rolo Tops Atlantic Classic Yearling Sale. https://standardbredcanada.ca/news/10-11-24/2024-atlantic-classic-yearling-sale.html*

responses for that specific question. Tables with more precise percentages can be found in Appendix A.

The survey was shared with members of the following organizations and associations who agreed to publicize the survey and distribute and promote it as best they could to their membership:

- Standardbred Canada;
- Nova Scotia Harness Racing Industry Association;
- Horse Racing New Brunswick;
- Ontario Harness Horse Association; and
- Harness Horsemen's Association of New England.

These organizations shared the survey through online posts on their websites and/or social media accounts. MRSB offered off-Island horse people an incentive to complete the survey by holding a $250 giveaway draw for those who completed the survey. The survey was open from September 24, 2024 to October 23, 2024. The survey included questions about the respondent's role in the industry, their travel habits when coming to PEI, and their spending practices on PEI. Quantitative responses were included for input to the economic model. A full copy of the survey questions and results is available in Appendix A.

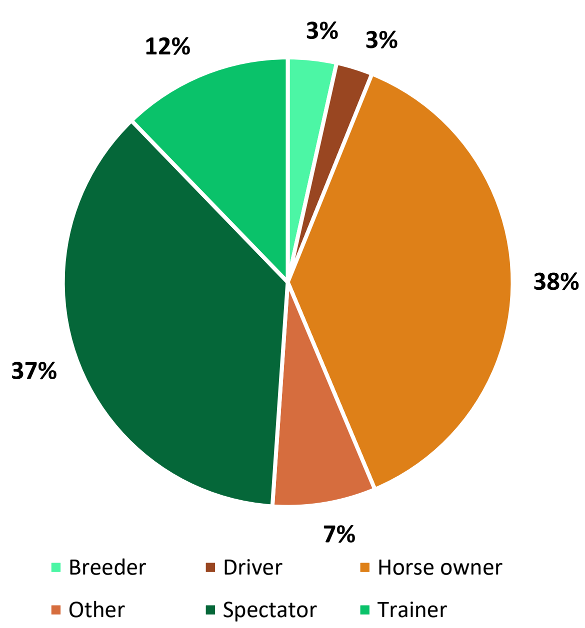
2.2.2 Survey Findings

2.2.2.1 Demographics

The majority (78%) of survey respondents live in the Maritimes, with 59% of respondents coming from Nova Scotia and 19% from New Brunswick. A smaller proportion of respondents come from Ontario (11%). Notably, Nova Scotia is the second-most active province in harness racing in the Maritimes after PEI with three tracks in the province.

The majority of respondents identified as male (74%), while 23% identified as female (and one respondent preferred to self-describe). Most survey respondents were above the age of 45 (93%), with the largest age group being between 55 and 64 years of age (32%). The most frequently listed role of respondents to this survey was horse owner at 38%, with spectator being the second highest at 37%. Breeders, drivers, trainers, and other roles accounted for the remaining 26% of respondents.

Figure 3. Response breakdown for the question "What is your primary role?".



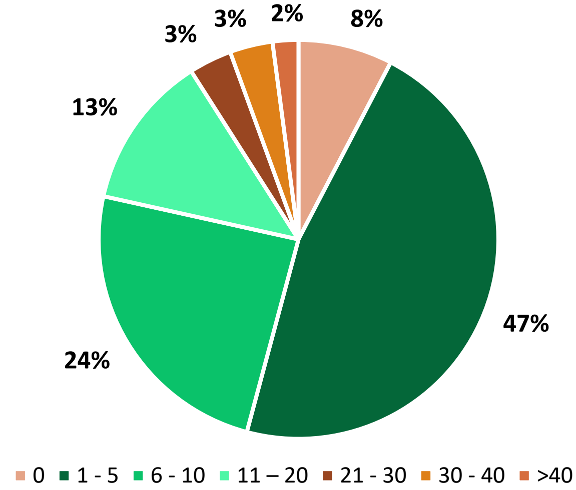
2.2.2.2 Travel to PEI for Harness Racing

2.2.2.2.1 Participants (Excluding Spectators)

Over a typical season, the most common number of trips to PEI by harness racing participants was between one and five (47%); however, the average number of trips per season was eight. Most respondents who travel to PEI to participate in harness racing are involved in between 1 and 50 races (80%). 5% of respondents reported participating in between 50 and 100 races.

When travelling to PEI to participate in harness racing, the 65% of respondents reported boarding a horse on PEI for at least one day. By number of days of boarding a horse on PEI, the largest category was between 1 and 50 days (36%), followed by almost 20% of respondents indicating boarding a horse for over 250 days.

Figure 4. Response breakdown for the question "On average in a typical racing season, how often would you travel to Prince Edward Island to race?".



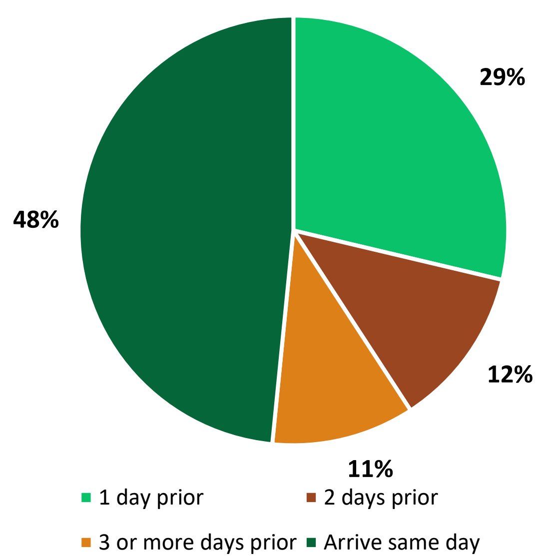
2.2.2.2.2 All Respondents

Most respondents who travel to PEI for harness racing stay for short periods of time. 48% of respondents typically travel to the Island on the same day as the race, and 29% arrive one day prior to the race. Most respondents also leave shortly after the race, with 77% leaving the Island within a day of the race (31% on the day of the race and 46% the following day).

Over half of respondents reported extending their stay in PEI for vacation purposes at least once during a typical season (69%). **When asked how long they would extend their visit to PEI, 48% reported staying for a week or longer**. Survey respondents most frequently travel to PEI during the racing season with friends and/or family (39%) or with their spouse/partners (39%). While staying on PEI during the harness racing season, 39% of respondents reported frequently staying at a hotel, motel, inn, or resort, while 19% reported frequently staying with friends and/or family. **91% of respondents reported staying at a property they do not own.**

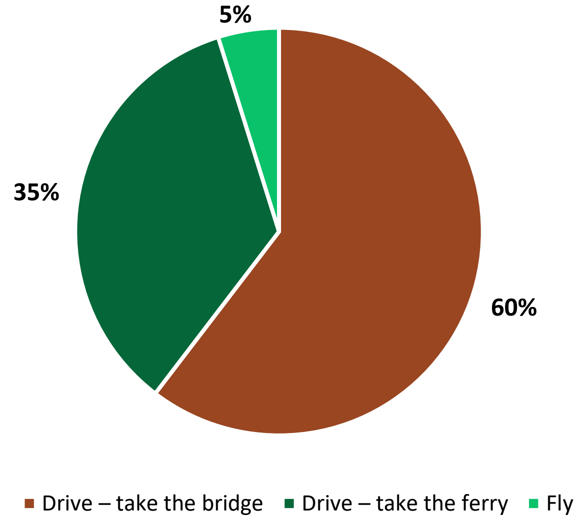
Most respondents (60%) arrive in PEI by way of the Confederation Bridge, while 35% reported using the ferry service. More survey respondents reported taking the ferry when travelling to PEI (35%) than using it when they depart from PEI (29%). It should be noted that the Wood Island, PE to Caribou, NS ferry service experienced prolonged service disruptions both in 2023 and 2024.

Figure 5. Response breakdown for the question "On average in a typical racing season, how many days before a race would you typically travel to Prince Edward Island?".



During key informant interviews, Island industry participants noted that the ferry is a better version of transportation for traveling with horses between PEI and Nova Scotia and is generally preferred over bridge travel. It could be assumed that this preference is shared by Nova Scotia participants coming to PEI. The survey did not ask respondents if they prefer the ferry over flying or taking the bridge to PEI.

Figure 6. Response breakdown for the question "How do you typically travel to Prince Edward Island?"



90% of respondents indicated using their own vehicle as their form of transportation while in PEI. For meals, 75% of respondents reported frequently eating at restaurants, and 43% indicated frequently purchasing take-out or fast-food meals. Over half of respondents (56%) rarely or never buy and prepare food from a grocery store while visiting the Island.

Respondents reported that, while on PEI for harness racing, they often took part in other activities. The most common activity reported was going to a beach, followed by shopping for local crafts/souvenirs/antiques and visiting friends and family. **The variety and frequency of other activities taken part in while visiting PEI for harness racing indicates the broad economic impacts and benefit to Island tourism driven by the industry.**

Table 7. While visiting Prince Edward Island during a typical racing season, do you take part in any other activities during your stay, or extend your stay to take part in activities such as: (Select all that apply)

Activity	Responses Received
Going to a beach	94
Shopping for local crafts/souvenirs/antiques	89
Visiting friends and/or relatives	88
Sightseeing/driving tour	86
Sampling local culinary products (lobster, potatoes, mussels, oysters, wine, beer, etc.)	86
Playing golf (not miniature)	74
Attending a festival, event, or concert (outside of Harness Racing)	57
Visiting a national or provincial park	55
Attending a sports event or tournament (as a spectator)	49
Visiting historical and cultural attractions	46
Attending a performance (live theatre, a play)	42
Visiting a theme, fun, or amusement park (outside of Old Home Week)	37
Visiting Anne of Green Gables and/or Lucy Maud Montgomery attractions	25
Using the Confederation Trail or other trails (cycling, walking, running, etc.)	23
Participating in water-based activities (kayaking, paddle-boarding, fishing, etc.)	15
Other	6

When asked about average spending throughout the harness racing season while on PEI, 75% of respondents reported spending less than $500 for tourism activities, shopping (82%), boarding (58%), and other horse-related costs (59%). The majority (73%) of respondents spend less than $1,000 on food and beverages, and about half (51%) of respondents spend less than $1,000 on accommodations, while the other half (49%) spend over $1,000, with all but one respondent spending less than $10,000. Respondents also reported other expenditures, such as gambling at the casino.

Extracting responses solely from spectators as to how much they spend during a typical harness racing season on PEI, the majority reported spending over $500 on accommodations (70%). Spending between $1 and $500 was the most reported amount for transportation (59%), food and beverages (56%), tourism activities (75%), shopping (82%), and other expenses (60%).

2.2.3 Conclusions from Survey

The survey results show that off-Island horse people significantly contribute to the PEI economy in more ways than just the revenue generated from the races they participate in. They represent regular visitors to the Island who participate in the economy by patronizing local businesses and contributing to the vitality of the local harness racing industry. Over 69% of survey respondents extend their trips to vacation on the Island, and nearly half of these trips last for a week or more. This shows the synergistic effects of PEI's strong harness racing industry coupled with an attractive tourism industry. When these horse people come to the Island to participate in or spectate harness racing, they also enjoy the same attractions as any other tourist that visits PEI.

These off-Island horse people generate large amounts of business for local companies, with shopping for local crafts/souvenirs/antiques being the second most popular activity among this group. They are also drawn to PEI's culinary scene, with sampling local culinary products being another top choice among survey respondents. Red Shores' campaign to tie the Island's culinary scene likely has made some contribution to this activity scoring so highly.

This group also patronizes PEI's tourism industry in other ways, such as by staying in hotels, motels, inns, or resorts, which is the most common form of accommodation for this group. Survey results show that over 48% of respondents estimated their seasonal spending on accommodations to be between $1,001 and $10,000, a very significant amount. This figure is certainly higher than the average PEI tourist, given the frequency of race events held on PEI, with the average respondent coming to PEI approximately eight times over a typical season.

When asked about dining, eating meals at restaurants or getting takeout were the two highest reported forms of dining for this group. Buying food from a grocery store to prepare themselves was much less popular. This shows that the tourists brought to the Island for harness racing are supporting local restaurants and may have higher amounts for discretionary spending.

The harness racing season also begins and ends outside of PEI's busiest tourism season, with the first PEI stake race being in May and the last being in late October. This helps local businesses extend their operating season and draws in customers when accommodations may have large amounts of vacancies and restaurants have fewer customers.

These impacts are all in addition to the large amounts that industry participants spend on boarding their horses on PEI, with 36% of respondents spending more than $1,000 on boarding horses in PEI. This is in addition to the amount spent on supplies and equipment while on PEI. More than a third of respondents, excluding spectators, spend between $1,001 and $10,000 on horse-related expenses during a typical season.

These off-Island participants make the PEI economy stronger, and this group does not include all the other tourists who consider harness racing part of PEI's draw and prioritize attending races as part of their itinerary.

Photo Source: Red Shores

3 Economic Impact Assessment

3.1 Economic Impact Theory Methodology

Information to determine the quantitative impact of PEI's harness racing industry on the province's economy was gathered from different sources:

(1) Horse Owners, Breeders, and Trainers
(2) Industry Associations
(3) Red Shores Racetrack & Casino
(4) Matinee Racetracks
(5) Survey of Visitors Travelling to PEI Specifically for Harness Racing
(6) Expenses Associated with Testing Conducted by the Canadian Pari-Mutuel Agency

The study required the collection of annual operating and capital investment information as well as employment data from these sources. This was collected in the form of annual financial statements, where available. Additional data was collected through key informant interviews, focus groups, and, in some cases, written questionnaire responses.

MRSB used these methods to create estimates for the capital expenditures related to the various categories of industry participants.

Horse Owners: Through survey analysis and numerous interviews, MRSB collected detailed information on the capital expenditures required to own standardbred racehorses. In these discussions, owners were able to provide high and low-cost estimates for each item and describe the expected lifespan of the asset. MRSB researched these items to verify the retail and used prices of the items. Once a high and low price point was determined, the median value was used to determine the average cost.

Horse Breeders: Also through survey analysis and key informant interviews, MRSB obtained insight into the capital expenditures required to establish and maintain a standardbred horse breeding operation in PEI. MRSB worked to determine what pieces of equipment are limited to use on an individual horse and which items are communally used between multiple horses within the operation. Additionally, MRSB was able to determine a high and low price point for each asset and used the median value to determine the average annual cost for each breeder in PEI.

Organizations: Organizations provided historical information surrounding the capital additions made each year. These figures were normalized to determine the average annual capital expenditures for each organization.

By administering this survey, conducting these key-informant interviews, and completing online secondary market research, MRSB was able to accurately estimate the average annual capital expenditures from each of these industry participant groups.

Information was collected from the following industry associations:

- PEI Harness Racing Industry Association
- Prince County Horsemen's Club
- PEI Standardbred Owners Association
- Atlantic Provinces Harness Racing Commission
- Canadian Pari-Mutuel Agency

Data on operational expenditures for the horse breeding activity was determined through interviews with Prince Edward Island breeders representing operations of various sizes. An average cost, as determined through these interviews, was calculated to estimate costs for the entire horse population. Data on operational expenditures for horse racing activities (including those in training but not yet racing) was determined through interviews with owners and trainers, and an average cost was determined and used to estimate costs for all horses training.

The primary method of data gathering was through in-person or telephone/video call interviews. Potential interviewees were identified by the authors and the project's Steering Committee members. Interviewees were chosen based on their affiliations within the PEI harness racing industry. Refer to Appendix E for a list of interviewees.

As discussed in Section 2.2, expenditures were also gathered from visitors to PEI who travelled to the province for the express purpose of participating or spectating in harness racing. While the survey data gathered is limited to only those who responded and thus does not fully capture the potential spending of this cohort, it represents a method through which to quantify some of the tourism expenditure resulting from harness racing. It provides an incomplete picture of the total spending by that group, but as the total number of visitors who came to the province for the express purpose of harness racing is unknown and unquantifiable within the scope of this report, no attempt to extrapolate out that expenditure data to capture all harness racing specific travel expenses was made.

As the economic impact model is based on employment and total expenditures related to the harness racing industry on PEI, some decisions had to be made related to expenditure attribution, where the expenditures are potentially and partially attributable to multiple industries. In the case of Red Shores expenditures, the employment, operating expenses, and capital expenditures were fully attributed to the harness racing industry. Multiple key informants expressed that the growth of the Red Shores complexes was largely attributable to harness racing. Without harness racing as the foundation upon which the rest of the entertainment business was built, many key informants doubted the casino and dining aspect of Red Shores would exist as it does today in its current form.

With it being extremely challenging to try to isolate employment, capital expenses, or operational expenses for harness racing alone as they are deeply intertwined with the other Red Shores business lines, the decision was made to include all Red Shores expenses and employment within expenses attributable to the industry.

A similar challenge presented itself in terms of expenditures related to tourism. Tourism PEI's visitor data for 2023/2024 shows that an estimated 4.2% of PEI's total overnight visitors and 2.1% of its same-day visitors that year reported going to a casino/racino while on PEI. However, insufficient data exists to adequately quantify what the expenditures of that cohort might be and how much of their spending should be attributed specifically to the harness racing industry. As a result, expenditure data was captured for a sample of visitors who travelled to PEI specifically for harness racing and included in the economic impact calculations (as described above), but no spending data for general tourists was included in the economic impact calculations. Some of the impact of this group is captured through employment figures from Red Shores that reflect staffing levels required to serve this population.

Data collected was provided to Eco Tech Consultants, a sub-contracted expert in the estimation of direct, indirect, and induced economic benefits, to determine the multiplier effect utilizing an input/output model. Qualitative impacts of the harness racing sector were identified through discussion with key industry stakeholders and literature review.

3.2 Input-Output Model

The fundamental theory behind economic impact analysis is that expenditures are multiplied through the economy; an increase in spending on some goods and services generates a need for additional goods and services. Using input-output analysis, we can estimate this cascading effect through the economy. All economic benefit assessments in this study were done using an Economic Impact Model (EIM) which uses the Statistics Canada Interprovincial Input-Output Model of the Canadian economy. The Model generates impact estimates for employment and GDP at the direct, indirect, and induced levels.

Direct Impacts - arise from the expenditures made in carrying out the activity in question: e.g., payments made to local employees or suppliers for goods or services.

Indirect Impacts - arise from the linkages into the broader economy. For example, if feed is purchased from a local feed store, the local store is positively impacted, able to buy inventory and employ workers, and this leads to a further increase in activity in industries supplying the goods and services needed to stock the store, and so on.

Induced Impacts - also arise from linkages into the broader economy. They result from the spending and re-spending of incomes earned in the sectors that expand to meet direct and indirect demand. For example, trainers spend their incomes on clothing and food. These expenditures help to support retail businesses that in turn pay wages that are spent and re-spent, and so on.

Expenditures for wages and salaries, feed and hay, and veterinary services tend to have a high local impact. Expenditures for equipment, such as racing bikes and horse trailers, tend to be more diffused, especially if the equipment is purchased from outside the province.

Prince Edward Island is the source for many of the day-to-day goods and services consumed by industry each year, but specialized equipment for driving and breeding is often imported from outside the province. This analysis approximates the direct, indirect, and induced effects with the help of an input-output table, which allows for the calculation of the effects on GDP and employment levels for Prince Edward Island.

The assumption is that an industry participant who receives wages or purse payments on PEI would spend a certain amount on goods and services produced in PEI and an amount on goods and services imported from outside the province. Using this assumption, we can estimate what proportion of every dollar spent stays in the province and how much leaks out in the form of imports and taxes - assuming that income tax and HST are leakages on the local economy.

We consider only the money paid to employees and contractors located on PEI. Expenditures will flow both to residents and non-residents, with expenditures to residents creating a second round of wages that will be spent, thus creating a third round, and so on. We can mathematically model how this process will occur. Next, we must identify the proportion of each category of expenditure that goes to PEI residents and businesses, with the remainder going to “imported” goods from other provinces or the rest of the world. We then add up the proportions of each dollar that is spent locally for each consumption category to determine how much out of every dollar spent in PEI is retained by the provincial economy. This methodology and model were applied to generate an economic impact analysis for the industry as a whole.

3.3 Results

The harness racing industry’s total annual expenditures are estimated at $82.4 million for PEI. This number was calculated by taking into consideration the combined expenditures of all industry sources’ capital expenses and operating costs and well as the spending data gathered from off-Island visitors who travelled to PEI specifically for harness racing. Using the calculated annual expenditures, the economic model showed the trickle-down effect of the industry’s inputs onto the greater economy.

The Prince Edward Island Harness Racing Industry generates an estimated $117 million in gross production for PEI. This amount takes into consideration the accumulated value of goods and services as generated by and within the industry, including the industry’s total gross domestic product (GDP) contribution to the Island. For the purposes of this report, the authors chose to focus on the quantitative, outward reach of the industry throughout PEI and Canada through GDP, employment, tax revenues, labour income, and imports. The following tables contain the summary of results for these categories.

Starting with gross domestic product (GDP) impact, Table 8 shows the direct, indirect, and induced impact of the Prince Edward Island harness racing industry. The industry contributes $57.6 million to Prince Edward Island’s gross domestic product (GDP) and $95.8 million to the Canadian economy as a whole.

Table 8. Summary of PEI harness racing industry's direct, indirect, and induced impact on gross domestic product provincially and nationally

GROSS DOMESTIC PRODUCT *(Values per million)*				
	DIRECT	INDIRECT	INDUCED	TOTAL
Alberta		$1.611	$1.074	**$2.686**
British Columbia		$0.913	$0.715	**$1.629**
Manitoba		$0.856	$0.348	**$1.204**
New Brunswick		$3.457	$1.256	**$4.713**
Newfoundland and Labrador		$0.279	$0.183	**$0.461**
Nova Scotia		$2.282	$1.122	**$3.404**
Nunavut		$0.003	$0.003	**$0.007**
NWT		$0.005	$0.007	**$0.012**
Ontario		$9.733	$6.023	**$15.757**
Prince Edward Island	$24.599	$20.854	$12.118	**$57.571**
Quebec		$5.334	$2.363	**$7.697**
Saskatchewan		$0.471	$0.219	**$0.690**
Yukon		$0.003	$0.005	**$0.008**
Canada	**$24.599**	**$45.802**	**$25.437**	**$95.837**

The GDP impact is made up of taxes on products, subsidies on products, subsidies on production, taxes on production, wages and salaries, employers' social contributions, gross mixed-income, and gross operating surplus. (A full breakdown of GDP impact by category for direct, indirect, and induced GDP is available in Appendix C.)

The numbers in Table 8 above show how far-reaching the PEI harness racing industry's impact on GDP is. As expected, it impacts PEI's GDP the most, and of course, there is great impact in the other Maritime provinces of Nova Scotia and New Brunswick – approximately $5 million and $3.5 million, respectively. However, the average Canadian would likely be surprised to learn that it also impacts the other provinces' GDP as well – most by over a million dollars. For Ontario, the most impacted province after PEI when it comes to the industry's total GDP contribution, the province sees about $16 million worth of indirect and induced GDP impact, and Quebec sees approximately $8 million. For what many in the public may perceive to be a small industry, the harness racing industry on PEI has substantial reach as shown through these economic impact results.

Secondly, when it comes to employment impact, the PEI industry contributes 820 full-time equivalent jobs to Prince Edward Island annually and 1,083 jobs for Canada in total. A full-time equivalent job (FTE) equals 2,000 hours of work each year; these FTEs may be a combination of full-time, part-time, and/or seasonal employment and so may represent a greater number of total employees than the sum states. The breakdown of employment impact by province and territory is shown in Table 9, with the nation-wide totals noted for the direct, indirect, and induced FTEs generated by the industry.

Table 9. Summary of PEI harness racing industry's direct, indirect, and induced impact on employment provincially and nationally

EMPLOYMENT *(Values per full-time equivalent jobs)*				
	DIRECT	INDIRECT	INDUCED	TOTAL
Alberta		9.430	5.820	**15.250**
British Columbia		6.050	5.290	**11.340**
Manitoba		5.850	2.630	**8.480**
New Brunswick		21.280	10.120	**31.400**
Newfoundland and Labrador		2.080	1.500	**3.580**
Nova Scotia		24.930	10.530	**35.460**
Nunavut		0.000	0.010	**0.010**
NWT		0.010	0.020	**0.030**
Ontario		57.040	40.930	**97.970**
Prince Edward Island	457.000	275.490	87.150	**819.640**
Quebec		39.280	17.600	**56.880**
Saskatchewan		1.860	1.090	**2.950**
Yukon		0.000	0.020	**0.020**
Canada	**457.000**	**443.300**	**182.710**	**1,083.010**

The direct FTE jobs attributed to the industry relate to the drivers, trainers, grooms, track staff, and other employees who are hired to complete the work required for breeding, caring for, and racing standardbreds. It should be noted that the harness racing industry also sees many volunteers completing important work that would otherwise need to be done by an employee. According to key informants, it is common to have family, friends, and other volunteers help care for horses, assist in running an association's operations, and involving themselves in other work.

The indirect and induced jobs from PEI's harness racing industry are in a variety of industry sectors including the following sectors (listed in descending order from most impacted): Performing Arts, Spectator Sports and Related Industries, and Heritage Institutions; Animal Production and Aquaculture; Professional Services; Traveller Accommodation, RV Parks, Recreational Camps, and Rooming Houses; Crops, Greenhouses, and Garden Centres; Food Services and Drinking Places; Wholesale Trade; Retail Trade; Repair and Maintenance (Including Automotive); and more. (A full breakdown of employment impacts through direct, indirect, and induced means can be found in Appendix C.)

The cascading impact of the harness racing industry throughout these sectors and others is evidence of the extensive reach the industry has on the economy. These FTE jobs are not just abstract numbers – they are representative of real work that people do and employment they rely on to live on Prince Edward Island and across the country.

The harness racing industry also contributes greatly to the economy through taxes municipally, provincially, and federally. The three levels of government receive direct, indirect, and induced tax revenues, with a cumulative total of $11.4 million in tax revenue generated on PEI and $18.4 million generated Canada-wide by the PEI industry. Table 10 below shows the breakdown of the tax revenue attributable to the PEI harness racing industry through direct, indirect, and induced means. Government tax revenue comes from property taxes, income taxes, corporate taxes, and GST/HST/PST taxes that people and businesses directly involved or involved by association pay to the government through the money they earn and spend because of the industry. The PEI industry contributes millions of dollars in tax revenue Canada-wide.

Table 10. Summary of the PEI harness racing industry's direct, indirect, and induced impact on government tax revenue

GOVERNMENT TAX REVENUES *(Values per million)*				
	DIRECT	INDIRECT	INDUCED	TOTAL
Alberta		$0.260	$0.208	**$0.468**
British Columbia		$0.162	$0.167	**$0.329**
Manitoba		$0.161	$0.085	**$0.246**
New Brunswick		$0.575	$0.355	**$0.930**
Newfoundland and Labrador		$0.037	$0.046	**$0.083**
Nova Scotia		$0.257	$0.316	**$0.573**
Nunavut		$0.000	$0.000	**$0.001**
NWT		$0.001	$0.001	**$0.002**
Ontario		$1.632	$1.674	**$3.306**
Prince Edward Island	$3.731	$3.707	$3.982	**$11.419**
Quebec		$0.630	$0.623	**$1.252**
Saskatchewan		$0.074	$0.040	**$0.114**
Yukon		$0.000	$0.001	**$0.001**
Canada	**$3.731**	**$7.496**	**$7.498**	**$18.725**

The tax revenues realized are categorized as follows:

Federal	**Provincial**	**Municipal**
Income Tax	Income Tax	Property Taxes
GST & Other Indirect Taxes	PST & Other Indirect Taxes	
Tax on Profits	Tax on Profits	

Table 11 below outlines the allocation of the total amounts of government tax revenue attributable to the PEI harness racing industry by tax type. (The full data breakdown of the industry's impact on government tax revenue is available in Appendix C.)

Table 11. Summary of the PEI harness racing industry's impact on federal and provincial government tax revenues for Prince Edward Island and Canada-wide

TOTAL GOVERNMENT TAX REVENUES BY CATEGORY *(Values per million, rounded to nearest tenth place)*		
	PRINCE EDWARD ISLAND	CANADA
Federal Taxes		
Federal Income Tax	$ 2.9	$4.5
GST & other Indirect taxes	$ 1.3	$2.2
Federal Tax on Corporate Income	$ 1.3	$2.8
Total Federal Taxes	**$ 5.5**	**$9.5**
Provincial Taxes		
Provincial Income Tax	$2.8	$3.9
Sales tax & other Indirect taxes	$2.4	$3.6
Provincial Tax on Corporate Income	$0.7	$1.7
Total Provincial Taxes	**$5.9**	**$9.2**

In addition to the above economic impact indicators, the analysis also provided data on labour income and imports that are generated by the operations and capital expenditures of the industry.

Table 12. Summary of PEI harness racing industry's direct, indirect, and induced impact on labour income provincially and nationally

LABOUR INCOME *(Values per million)*				
	DIRECT	INDIRECT	INDUCED	TOTAL
Alberta		$0.900	$0.575	**$1.475**
British Columbia		$0.615	$0.467	**$1.082**
Manitoba		$0.473	$0.192	**$0.665**
New Brunswick		$1.817	$0.716	**$2.533**
Newfoundland and Labrador		$0.171	$0.106	**$0.277**
Nova Scotia		$1.673	$0.711	**$2.384**
Nunavut		$0.001	$0.002	**$0.003**
NWT		$0.002	$0.003	**$0.005**
Ontario		$6.571	$3.600	**$10.171**
Prince Edward Island	$24.028	$14.221	$6.909	**$45.157**
Quebec		$3.405	$1.391	**$4.796**
Saskatchewan		$0.186	$0.094	**$0.280**
Yukon		$0.002	$0.003	**$0.005**
Canada	**$24.028**	**$30.038**	**$14.769**	**$68.834**

As stated in Table 12, Canada experiences a labour income impact of $69 million. PEI itself sees over $45 million of labour income impact.

Labour income is an important example of the real, financial impact that everyday people receive from the PEI harness racing industry through direct, indirect, or induced means. Like employment, these numbers represent the estimated dollars that Canadian workers are earning because of the industry. These figures reflect an element of people's livelihoods and the source of people's income to spend on things like food, shelter, clothing, and other needs and quality-of-life-improving purchases.

The PEI harness racing industry also sees millions of dollars of imports added to the PEI and Canadian economies. Table 13 on the following page outlines the direct, indirect, and induced import value attributable to the Island's harness racing industry. Canada's economy receives approximately $62 million due to imports related to the industry, and PEI receives over $46 million.

Table 13. Summary of PEI harness racing industry's direct, indirect, and induced impact on imports provincially and nationally

IMPORTS *(Values per million)*				
	DIRECT	INDIRECT	INDUCED	TOTAL
Alberta		$0.498	$0.405	**$0.903**
British Columbia		$0.244	$0.272	**$0.516**
Manitoba		$0.396	$0.169	**$0.565**
New Brunswick		$2.460	$1.127	**$3.587**
Newfoundland and Labrador		$0.075	$0.081	**$0.156**
Nova Scotia		$1.670	$0.605	**$2.275**
Nunavut		$0.002	$0.002	**$0.003**
NWT		$0.003	$0.005	**$0.008**
Ontario		$2.365	$2.206	**$4.571**
Prince Edward Island	$25.928	$11.230	$8.920	**$46.078**
Quebec		$1.936	$1.014	**$2.949**
Saskatchewan		$0.190	$0.087	**$0.277**
Yukon		$0.001	$0.002	**$0.003**
Canada	**$25.928**	**$21.068**	**$14.895**	**$61.892**

For the full breakdown of the direct, indirect, and induced economic impacts on gross domestic product, employment, government tax revenues, labour income and imports, please see Appendix C.

3.4 Qualitative Impacts of the Industry

3.4.1 Veterinarian Development and the Atlantic Veterinary College

The Atlantic Veterinary College (AVC) at the University of Prince Edward Island (UPEI) is one benefactor of the harness racing industry on the Island. The AVC provides veterinary services, including ambulatory and theriogenology (reproductive) services, to horses involved in the industry, and, as such, provides learning opportunities through the industry to its students. Many students at the AVC gain practical experience in the medical and biological sciences by working with the horses involved in harness racing, which helps to enhance their education while attending the AVC. The resident herds at the AVC are comprised of standardbred horses. This relationship ensures that the college remains a leader in equine veterinary care, benefiting both the local community and the broader Atlantic region. The AVC analyzes all samples collected for the APHRC's TCO_2 testing program. This testing plays an important role in supporting the professional standards that are required to ensure fair pari-mutuel racing.

> *Many students at the AVC gain practical experience in the medical and biological sciences by working with the horses involved in harness racing.*

AVC's expertise with standardbred horses – because of the animals' large presence on PEI due to the harness racing industry – reaches beyond PEI through graduates who learn from the standardbred population on PEI and then bring that knowledge elsewhere in their off-Island practices. This export of human resource talent and skill is most certainly a benefit to industries in other provinces.

On a broader scale, private clinicians also benefit from the presence of the harness racing industry on PEI. There are various veterinary clinics that specialize in standardbred care. These clinics, like the AVC, offer valuable, hands-on teaching opportunities to new veterinarians, whether caring for horses in-clinic or on-farm. These teaching and learning opportunities related to caring for standardbred horses, in addition to research, are vital for both the progression of veterinary medicine and the industry.

3.4.2 Preserves Agriculture Land and Pastoral Beauty; Improves Rural PEI

Harness racing in PEI helps to preserve agricultural land, particularly as it relates to breeding, training, and caring for the horses involved in the industry. The rural nature of the industry requires open spaces for training tracks, stables, and pastureland for the horses. This demand supports the agricultural sector by maintaining large swaths of land that might otherwise be at risk of being converted for development. As such, the harness racing industry helps to ensure the continued viability of PEI's agricultural landscape, preserving its rural character and contributing to sustainable land use practices. This preservation of farmland is crucial for maintaining the Island's agricultural heritage, and it supports the rural economy by fostering the growth of associated industries, such as feed, farming, and transportation.

The pastoral beauty that defines the Island's identity is intricately tied to the harness racing industry. The sweeping rural landscapes and open spaces where standardbreds are kept contribute to the PEI's scenic charm. The industry complements the Island's image as a serene agricultural destination, offering a unique blend of tradition and nature. This harmony between harness racing and the Island's countryside ensures that the industry's effects remain integrated into the cultural fabric of PEI, providing a visual and experiential connection for both locals and visitors. Whether arriving by plane, bridge, or ferry, it is nearly impossible to avoid observing a pasture of horses.

Harness racing also supports rural PEI by stimulating local economies and providing opportunities for employment and skill development. The industry creates jobs in various sectors, including agriculture, horse breeding, training, event management, and hospitality. The presence of matinee tracks in rural areas also supports local businesses, such as restaurants and retail shops, which benefit from the influx of attendees during the racing season. Furthermore, the industry attracts a dedicated community of volunteers, staff, and supporters, helping to preserve the vibrancy and identity of rural communities. By strengthening rural economies, harness racing contributes to reducing outmigration and ensuring the ongoing sustainability of PEI's landscape.

Harness racing also supports rural PEI by supporting local economies and providing opportunities for employment and skill development.

3.4.3 Environmental Impacts

The environmental impacts of the harness racing industry in PEI are generally positive, particularly in promoting sustainable land management practices. The need for open spaces for horse training and stabling encourages the maintenance of rural landscapes and green spaces, helping to prevent urban sprawl. The feed crops used by the harness racing industry also help the environment through the CO2 that the plants capture while growing. Additionally, many farms involved in harness racing engage in environmentally conscious practices such as crop rotation, organic feed production, and land conservation. Agricultural land associated with the industry is involved in the carbon economy through the sale and trade of carbon credits with businesses looking to offset their emissions.

The industry also encourages the proper management of manure, contributing to improved soil quality on agricultural lands. While harness racing activities generate some environmental footprint, including the use of energy and water for maintaining facilities, the overall impact is mitigated by the emphasis on preserving the natural environment and enhancing the rural way of life.

3.4.4 Maintaining Island Heritage and Tradition

Harness racing is deeply embedded in the heritage and tradition of the Island, serving as a living testament to its rural history. The sport has long been a part of PEI's agricultural roots, where racing was both a popular pastime and an important economic driver. Today, harness racing is a robust industry and remains a key cultural tradition, celebrating the Island's connection to horses, agriculture, and community. The preservation of this tradition ensures that future generations continue to engage with their heritage through both participation in the industry and the celebration of annual racing events such as the Gold Cup & Saucer and Governor's Plate. This ongoing connection to PEI's history helps foster a sense of pride and identity among Islanders and visitors alike.

> *Harness racing is deeply embedded in the heritage and tradition of the Island, serving as a living testament to its rural history.*

3.4.5 Youth Participation and Development

Harness racing offers valuable opportunities for youth participation and development in Prince Edward Island. The industry provides young Islanders with the chance to engage in equine sports, learn about horsemanship, and develop skills in animal care, driving, and teamwork. Youth development, through PEIHRIA initiatives and the Island's matinee tracks, helps introduce younger generations to the industry, fostering an interest in both the technical and cultural aspects of harness racing. This involvement in harness racing teaches important life skills, including responsibility, discipline, and perseverance, while also exposing them to potential career paths in the equine industry.

Key informants reported seeing more and more younger people at the tracks in recent years, and the anecdotal information suggests that youth engagement in the industry is on the rise. There are several factors attributable to this rise in participation. In recent years, more and more dedicated grooms have been working in the industry, as opposed to the other members of a horse's team filling this role in addition to their existing role. Many grooms tend to be younger, and the role is frequently filled by young women, increasing female participation in the industry as well.

> *Involvement in harness racing teaches important life skills, including responsibility, discipline, and perseverance, while offering potential career paths in the equine industry.*

Another driver of increased youth participation is the rise in fractional ownership of horses. The ability to invest a smaller amount than the full purchase price of a horse has reduced the barriers to entry into the industry and allowed more younger people just starting out in their careers to become directly involved in harness racing through fractional ownership. This access has resulted in more young people with an active ownership stake in harness racing and more likely to be attending racing events.

> *The matinee tracks on PEI have a long history of engaging youth and introducing them to the industry.*

The matinee tracks on PEI have a long history of engaging youth and introducing them to the industry by providing opportunities to participate in various industry roles. Matinee tracks give young drivers a chance to learn the skills of the trade. Matinee tracks, as noted repeatedly by key informants, have a keen sense of community, and these tracks offer youth the opportunity to learn from older industry participants who may be retired from pari-mutuel racing but still race at the matinee tracks. Youth at matinee tracks are also exposed to the industry in various other ways, such as caring for the horses, announcing races, and volunteering for different jobs at events. For generations, the matinee tracks have been a breeding ground for the industry's top talent, and industry members seem passionate about this tradition continuing for generations to come.

The newly created interprovincial miniature horse races are another excellent example of youth engagement in the industry. In the 2024 season, 20-30 young drivers participated in the miniature horse races. These adolescent drivers were of various ages and genders, and they travelled to tracks around PEI and Nova Scotia to race. Anecdotally, miniature horse races are a unique draw for the public to come to the matinee and professional tracks on PEI, and they are engaging youth within and beyond the established harness racing industry. The miniature horse races are welcoming events where participants often share equipment and horses so that those who are interested in trying the sport may do so without having to own a horse, harness, and race bike themselves. This allows participants to get involved in harness racing at various levels of commitment, and no matter what level of commitment these participants have—owning a horse, leasing a horse, or simply being around a horse—the key success of the miniature horse races is that these youth *are* getting involved. The hope of the organizers is that the youth participating in the miniature horses stay involved in the harness racing industry throughout their lives and become the next generation of grooms, trainers, drivers, and industry supporters.

By encouraging youth participation, the industry ensures its future sustainability and strengthens the connection between the younger population and PEI's agricultural roots.

3.4.6 Tourism

Harness racing contributes significantly to tourism in Prince Edward Island, drawing visitors from across the Atlantic region, Canada, and beyond to experience the excitement of live races, meet horses and trainers, and explore the Island's rural charm. The annual racing season is a highlight for many tourists, with the Island's picturesque tracks offering an authentic and unique experience. Major events, such as the Gold Cup & Saucer and Governors Plate, attract large crowds, benefiting local businesses, hotels, and restaurants. Additionally, the association between harness racing and PEI's agricultural and cultural heritage enhances the Island's appeal as a year-round destination, particularly for those interested in experiencing its rural traditions and engaging with its vibrant equine community.

> *The annual racing season is a highlight for many tourists, with the Island's picturesque tracks offering an authentic and unique experience.* "

Tourism PEI's visitor data for 2023/2024 shows that an estimated 4.2% of PEI's total overnight visitors and 2.1% of its same-day visitors that year reported going to a casino/racino while on PEI. This equates to roughly 59,181 visitors who were at Red Shores Charlottetown or Summerside, the two biggest harness racing hubs on PEI. This number is only a snapshot of the draw harness racing has for visitors. Harness racing is a unique cultural entertainment experience on PEI and a cornerstone of the province's annual Old Home Week traditions, which draw thousands of Islanders and visitors to the Charlottetown Driving Park.

The Harness Racing Industry is a product leveraged by PEI's tourism industry, with it being a unique differentiator from other travel destinations. In the fall of 2024, PEI hosted a Grand Slam of Curling event, which brought in competitors and fans from across the world. During their time here, some of this group was brought to Red Shores Raceway and Casino so that they could tour the facilities and learn more about harness racing. Additionally, there are packages available that lump together tourism offerings, with one package including going to the stables of Marc Campbell, a renowned PEI horse trainer and driver, to tour his operation.

Each year, Sport Tourism Canada releases its Sport Hosting Index report, which ranks Canadian cities on their ability and success in hosting sporting events. Charlottetown frequently ranks first place in the category for cities with less than 50,000 residents. According to an officer from the City of Charlottetown, harness racing is a major contributor to this ranking, along with the size and success of the Gold Cup & Saucer. This interviewee also shared that the Gold Cup and Saucer event carries a lot of brand identity for the City and the Island.

A director from Tourism PEI also stated how big of a draw harness racing is for the province's tourism industry and theorized that creating another large racing event for the shoulder season could be a strategy to drive more traffic to PEI during a less busy tourism period. This comment underscores the positive draw that existing harness racing events have on tourism to the province of PEI.

3.4.7 Enhances Profile of PEI Globally

The harness racing industry plays an important role in enhancing the global profile of Prince Edward Island. By hosting internationally recognized events and attracting participants from all over the world, PEI showcases its unique combination of culture, agriculture, and equine excellence. The Island's reputation as a leader in harness racing is strengthened nationally and internationally through the success of its local horses, trainers, and drivers. Some of the top drivers in Canada started their careers in PEI and took the skills they gained on the Island to other jurisdictions. The quality of the Island's breeding program (as evidenced in Section 2.1.5.3 – Atlantic Classic Yearling Sale) has also made PEI well-known within the standardbred community. This global visibility not only promotes the sport but also increases awareness of PEI as a tourist destination and agricultural hub, boosting its international standing in both the equine and tourism industries. Harness racing, therefore, serves as a powerful ambassador for PEI on the world stage.

The Island's reputation as a leader in harness racing is strengthened nationally and internationally through the success of its local horses, trainers, and drivers.

Photo Source: Red Shores

4 Conclusion

PEI's harness racing industry is comprised of dedicated and passionate participants and spectators, and the Island is widely considered to be the centre of harness racing in Atlantic Canada. This dedication and passion derive from the industry's beginnings in the late 1800s. Since this time, it has evolved from a pastime to a sport and now a complex industry supporting the livelihoods of many. Harness racing has wide-ranging quantitative and qualitative benefits to the Island, the Maritime and Atlantic regions of Canada, and the country as a whole.

PEI represents 759 active members of Standardbred Canada, which is 51% of Atlantic Canada's membership and 12% of Canada's membership – both of these figures far outweighing the population distribution of each. Resulting from this overrepresentation within Canada's industry from Island-based participants, there are unique benefits of the industry on PEI. Namely (and as discussed throughout this **Economic Impact Analysis**), harness racing enables synergistic learning opportunities with the Atlantic Veterinary College at the University of Prince Edward Island and with private veterinary clinicians; it serves to preserve agricultural land and the Island's pastoral beauty; it maintains the Island's rurality; it offers opportunities for youth participation and development; and it enhances PEI's reputation on a global scale. All of these qualitative benefits represent items that help support PEI's top export: tourism.

The Island's harness racing industry is responsible for an estimated $24.6 million in direct GDP and $57.6 million in total GDP to PEI, 820 FTEs, and $11.4 million in provincial government tax revenues. The industry represents a significant contribution to the financial well-being of Prince Edward Island.

In short, while the harness racing industry is considered by many participants to be a passion that would be pursued even with no financial benefit, the transition from a 'sport' to an 'industry' is notably represented by the extent of its impact on the Island's economy.

The Island's harness racing industry is responsible for an estimated $24.6 million in direct GDP and $57.6 million in total GDP to PEI, 820 FTEs, and $11.4 million in provincial government tax revenues.

5 Appendices

Appendix A. Survey Results

Table 14. Where is your primary residence?

Primary Residence of Survey Respondents		
Location	**# of Respondents**	**% of Respondents**
Newfoundland and Labrador	5	2.17%
New Brunswick	44	19.13%
Nova Scotia	135	58.70%
Ontario	26	11.30%
Quebec	7	3.04%
Rest of Canada	9	3.91%
USA	4	1.74%
Total Responses	**230**	

Table 15. Gender: How do you identify?

Gender Survey Respondents Identify As		
Row Labels	**Count of Gender: How do you identify?**	**% of Respondents**
Man	125	73.96%
Prefer not to answer	4	2.37%
Prefer to self-describe	1	0.59%
Woman	39	23.08%
Grand Total	**169**	

Table 16. Age: How old are you?

Age of Survey Respondents		
Row Labels	**Count of Response**	**% of Respondents**
65+ years old	45	26.63%
55-64 years old	54	31.95%
35-44 years old	20	11.83%
45-54 years old	38	22.49%
25-34 years old	8	4.73%
Prefer not to answer	2	1.18%
18-24 years old	2	1.18%
Grand Total	**169**	

Table 17. What is your primary role?

Primary Role of Survey Respondents		
Primary Role	**# of Respondents**	**% of Respondents**
Breeder	8	3.5%
Driver	6	2.6%
Horse owner	86	37.6%
Other	17	7.4%
Spectator	84	36.7%
Trainer	28	12.2%
Grand Total	**229**	

Table 18. On average in a typical racing season, how often would you travel to Prince Edward Island to race?

Frequency of Travel to PEI in a Typical Season		
Days	**# of responses**	**% of responses**
0	11	7.64%
1 - 5	67	46.53%
6 - 10	35	24.31%
11 – 20	18	12.50%
21 - 30	5	3.47%
30 - 40	5	3.47%
>40	3	2.08%
Total	**144**	

Table 19. On average in a typical racing season, how many races would you participate in while visiting Prince Edward Island?

Quantity of Races Survey Respondents Participate in		
# of races	**# of responses**	**% of responses**
0	17	12.23%
1-50	111	79.86%
51-100	7	5.04%
101-250	1	0.72%
250-500	1	0.72%
>500	2	1.44%
Total	**139**	

Table 20. On average in a typical racing season, how many days in total during the season would you board your horse on Prince Edward Island?

Number of Days Respondents Board a Horse on PEI		
# of days	**# of responses**	**% of respondents**
0	50	35.46%
1-50	51	36.17%
51-100	4	2.84%
101-250	8	5.67%
>250	28	19.86%
Total	**141**	

Table 21. On average in a typical racing season, how many days before a race would you typically travel to Prince Edward Island?

Number of Days Prior to a Race Respondents Travel to PEI		
In a typical racing season, how many days before a race would you typically travel to Prince Edward Island?	**# of respondents**	**% of respondents**
1 day prior	64	28.70%
2 days prior	27	12.11%
3 or more days prior	24	10.76%
Arrive same day	108	48.43%
Grand Total	**223**	

Table 22. On average in a typical racing season, how many days after a race visit would you typically stay in Prince Edward Island?

Number of Days Respondents Stay in PEI After a Race		
On average in a typical racing season, how many days after a race visit would you typically stay in Prince Edward Island?	**# of respondents**	**% of respondents**
Depart next day	102	46.15%
Depart same day	68	30.77%
Depart three or more days after	33	14.93%
Depart two days after	18	8.14%
Grand Total	**221**	

Table 23. On average in a typical racing season, do you ever extend your stay in Prince Edward Island for vacation purposes?

Number of Respondents That Extend Their Stays for Vacation Purposes		
Do you ever extend your stay in Prince Edward Island for vacation purposes?	**# of responses**	**% of responses**
Yes	153	69.23%
No	68	30.77%
Total responses	**221**	

Table 24. How many days would you typically extend your visit?

Number of Days Respondents Typically Extend Their Stays		
How many days would you typically extend your visit?	**# of respondents**	**% of respondents**
Greater than one week	28	17.83%
Less than a week	82	52.23%
One week	47	29.94%
Grand Total	**157**	

Table 25. How do you typically travel to Prince Edward Island?

Method of Transportation to Arrive in PEI		
How do you typically travel to Prince Edward Island?	**Response #s**	**Percentage**
Drive – take the bridge	125	60.39%
Drive – take the ferry	72	34.78%
Fly	10	4.83%
Grand Total	**207**	

Table 26. How do you typically depart from Prince Edward Island?

Method of Transportation to Depart From PEI		
How do you typically depart from Prince Edward Island?	**Response #s**	**Percentage**
Drive – take the bridge	137	66.18%
Drive – take the ferry	59	28.50%
Fly	11	5.31%
Grand Total	**207**	

Table 27. How do you typically travel within Prince Edward Island? Please select all that apply.

Method of Transportation While in PEI		
How do you typically travel within Prince Edward Island? Please select all that apply	**Response #s**	**Percentage**
In the vehicle or rental car of a business partner/staff member/colleague	3	1.45%
My own vehicle	186	89.86%
Other (please specify)	3	1.45%
Rental Car	8	3.86%
Taxi	2	0.97%
Vehicle of a friend or family member who lives in PEI	5	2.42%
Grand Total	**207**	

Appendix B. Findings from Jurisdictional Scan

To put findings of the PEI harness racing industry into further context, four provinces in Canada and five states in the United States were analyzed. Key elements of these industries were captured, including levels of government support, the economic impact of the industry, and strengths and challenges.

1. Canadian Trends

1.1 Ontario

Ontario has the largest harness racing industry in Canada, holding over 7,200 races in 2023, compared to the Atlantic region's approximately 2,000 races. Ontario has a total of fifteen racetracks, twelve of which host standardbred racing. While Ontario's horse racing industry receives comparatively large amounts of government funding, the level of government funding has been reduced in recent years.

In 1998, the Slots at Racetracks Program (SARP) was created, allowing the Government of Ontario to place its slot machines within racetrack facilities. Due to the inevitable decline that this would have on horse racing wagering, it was agreed that 20% of Ontario's slot machine revenue would be provided to the horse racing industry. This provided the industry with an average of approximately $345 million per year in revenue. In 2012, this program was abruptly ended, causing turmoil across the industry, with purse sizes, number of races, number of mares bred, and many more metrics all significantly decreasing. After a year of uncertainty, the Government of Ontario began subsidizing the industry again (albeit at a much lower level) bringing some stability back.

In 2019, government funding increased again, with Ontario entering a nineteen-year funding agreement that provided annual funding to the industry of $120 million for the first two years of the agreement before a planned decrease in subsequent years.[35]

The industry provides Ontario's provincial economy with a notable economic benefit. A 2019 report found that standardbred horses contribute $915.1 million annually to Ontario's economy, provide 10,693 full-time equivalents (FTEs), and produce $368.4 million in tax revenue.[36]

Racing is the link in the value chain that provides the most economic impact, including $1,022 M in GDP, 12,128 FTEs, and $391.6 M in tax revenue (note: this includes standardbreds, thoroughbreds, and quarter horses).

[35] Ministry of Finance. (2019). Chapter 3, Section 3.12. *Provincial Support to Sustain the Horse Racing Industry. https://www.auditor.on.ca/en/content/annualreports/arreports/en19/v1_312en19.pdf*
[36] Ontario's Lottery & Gaming. (2021, November). *The Economic Contribution of Horse Racing in Ontario.*

Table 28, Economic Impact by Breed, Value Chain Link, and Stakeholder (Ontario's Lottery & Gaming)

Total Economic Impact (Operational + Capital Spending)				
		GDP	FTE	Tax Revenue
Breed	**Standardbred**	**915.1 M**	**10,693**	**368.4 M**
	Thoroughbred	934.2 M	11,894	354.9 M
	Quarter Horse	34.8 M	378	13.0 M
Value Chain	Pre-racing	784.7 M	9,838	313.8 M
	Racing	1,021.7 M	12,128	391.6 M
	Post Racing	77.7 M	999	30.9 M
Stake-holder	Race Tracks	400.1 M	4,382	145.9 M
	Horse People	1,446.1 M	18,250	578.7 M
	Assoc & Gov AG	37.8 M	333	11.7 M

Table 29, Economic Impact by Breed (Ontario's Lottery & Gaming)

	Operational Expenditures				Capital Expenditures			
	SB[37]	TB	QH	Total	**SB**	TB	QH	Total
Initial Expenditure ($M)	**682.6**	706.3	27.0	1415.9	**216.8**	217.3	8.0	442.1
GDP ($M)	**742.0**	750.9	27.6	1520.5	**173.1**	183.3	7.2	363.6
Direct($M)	**424.2**	446.4	16.7	887.4	**64.2**	68.3	2.7	135.2
Indirect ($M)	**115.0**	115.3	4.1	234.5	**47.6**	50.2	1.9	99.7
Induced ($M)	**202.8**	189.1	6.7	398.6	**61.3**	64.8	2.6	128.7
FTE, Jobs	**8,964.3**	9,899.5	307.8	19,171.6	**1,728.8**	1,994.3	70.6	3,793.7
Direct($M)	**6,178.9**	7,166.2	213.6	13,558.7	**790.5**	995.7	32.2	1,818.4
Indirect ($M)	**989.9**	1,058.6	34.8	2,083.3	**395.3**	424.9	15.4	835.6
Induced ($M)	**1,795.5**	1,674.7	59.4	3,529.6	**543.1**	573.7	22.9	1,139.7
Taxes ($M)	**283.7**	265.5	9.5	558.7	**84.6**	89.4	3.5	177.6
Provincial	**127.1**	117.7	4.2	249.0	**37.2**	39.3	1.6	78.0
Federal	**120.2**	114.0	4.0	238.2	**36.7**	38.9	1.5	77.1
Municipal	**36.5**	33.8	1.2	71.5	**10.7**	11.3	0.4	22.4

1.2 New Brunswick

New Brunswick's harness racing industry has struggled in recent years, with its industry receiving far less government support than PEI. Following the closure of its primary track in Saint John in 2022, Harness Racing New Brunswick was forced to move its operations to the Woodstock Raceway. The closure of this track in Saint John was significant, given that this track had been around for over 150 years. In the news article from CTV announcing the closure of this track, the strength of PEI's harness racing industry was noted, with it also stating that PEI is an example to

[37] SB: Standardbred, TB: Thoroughbred, QH: Quarter horse

follow for other provinces.[38] While Atlantic Lottery Corporation had looked into attaching a casino to a track in New Brunswick, they were not able to find a viable business case.

Even though it is the sole track in New Brunswick, Woodstock Raceway held the fewest number of races of the six maritime tracks in 2023, with just 62. This is less than a third of any of the other tracks and just 6% of Charlottetown's number of races. While Woodstock Raceway did have the smallest total purse sum, it had the largest average purse per race of any track within the Maritimes due to its limited number of races, as shown in Table 30 below.

Table 30, Maritime racing venue statistics (Standardbred Canada)

Province	Track	# of Races	Purse per race	Purse per horse	Total Purse
NB	Woodstock Raceway	62	$4,670	$2,656	$289,550
NS	Inverness Raceway	191	$2,049	$1,928	$391,360
NS	Northside Downs	234	$1,458	$2,420	$341,175
NS	Truro Raceway	192	$3,301	$2,209	$633,879
PEI	Charlottetown Driving Park	1,026	$3,789	$5,759	$3,887,330
PEI	Summerside Raceway	356	$4,420	$2,856	$1,573,615

1.3 Nova Scotia

While Nova Scotia has a substantial harness racing industry, having hosted 617 races in 2023 (compared to PEI's 1,382 races), it does not have as much government support as PEI does. While Nova Scotia held a sizeable number of races, its purse sizes were smaller than the other two Maritime Provinces on a per horse and per race basis, with the three NS tracks ranking as the bottom three on both metrics.

While Nova Scotia's industry does not receive the same level of government funding as PEI, it still receives a sizable amount, with one million dollars in government funding being divided evenly between the three tracks each year. Nova Scotia's three tracks also receive a portion of the revenue from online and telephone betting. Following a decision from the Atlantic Provinces Harness Racing Commission and a subsequent court case, the distribution of these gaming funds is now based on area codes. Previously, the majority of this revenue went directly to Truro Raceway, and small amounts went to Inverness Raceway and Northside Downs.[39]

1.4 Alberta

Alberta's horse racing industry is a significant contributor to the provincial economy. In 2019, the total economic impact of the horse racing industry was $312 million, comprised of $157 million in direct expenditures and $155 million in indirect and induced expenditures. This industry also

[38] Moore, N. (2022, October). *End of an era: harness racing comes to a close in Saint John.* CTV News. https://atlantic.ctvnews.ca/end-of-an-era-harness-racing-comes-to-a-close-in-saint-john-1.6111771#:~:text=Good%20reasons%20to%20be%20here,Scott%20Bernard%20at%20Sunday's%20event
[39] Welland, V. (2023, January). *Dispute over horse racing revenues heads to Halifax court.* CBC News. https://www.cbc.ca/news/canada/nova-scotia/horse-racing-revenue-dispute-court-case-1.6728604

added 1,506 jobs (FTE) within the province. When including owners and unpaid labour, nearly 4,800 individuals are involved in Alberta's horse racing industry.

As shown in Table 32, this is broken down into:

- impacts from physical racing infrastructure and related activities,
- racing activities, and
- breeding and raising activities.

There were $16.95 million in direct impacts limited solely to breeding and raising activities of standardbred horses. Standardbred racing activities accounted for $13.45 million in direct impacts.

The costs associated with the physical infrastructure for racing equalled $59.57 million in 2019. This includes $42.79 million in operational expenditures and $16.79 million in capital expenditures, primarily stemming from new tracks. An additional $47.98 million in indirect and induced impacts was attributed to physical racing infrastructure and related activities.

Table 31, Economic Impacts of the Horse Racing Industry by Expenditure Category (Serecon)

2019	Direct	Indirect and induced	Total Economic Impact
Breeding and Raising Activities	51,107,627	55,911,744	107,019,370
Racing Activities	46,382,557	50,742,518	97,125,075
Physical Racing Infrastructure and Related Activities	59,572,082	47,980,523	107,552,605
Total	$157,062,266	$154,634,784	$311,697,050

Prior to this 2019 economic impact assessment, the previous assessment was conducted in 2015. Between these four years, there was a decline in the number of horses, the number of race days, and the number of jobs. The number of racehorses declined from 5,562 in 2015 to 4,865 in 2019, a decrease of 13%. The number of race days went from 251 to 219, also a 13% decrease. The number of jobs decreased 8%, going from 1,629 to 1,506. While these metrics were negative between the four years, the cost of breeding and raising a horse increased by 21% due to general inflation and an increase in feed, labour, and fuel, resulting in an overall increase of 13% in expenditures.

Horse Racing Alberta (HRA) is a major support for this industry, injecting large amounts of money. Of the $59.6 million spent by racetracks in 2019, $30 million came from HRA. HRA has also provided an additional $1.5 million for racing expenditures and $10.5 million in purse contributions.[40]

2. Trends in the United States

[40] All data related to Alberta is from:
Serecon. (2020, February). *The Economic Impacts of Horse Breeding, Raising, and Racing in Alberta (2019).*

The American Gaming Association's 2023 Annual Report describes how each state makes use of its casino tax revenue. According to that report, twelve states directly support their horse racing industries with taxes levied from casinos. These states are New Mexico, Oklahoma, Arkansas, Louisiana, Indiana, West Virginia, Maryland, Delaware, Pennsylvania, New York, Massachusetts, and Maine.[41][42]

2.1 Massachusetts

Massachusetts' horse racing industry has undergone challenges over recent years. In 2019, Suffolk Downs, a historically significant thoroughbred racing track, was closed and sold to be redeveloped into apartment buildings and retail space. Since the closure of this track in 2019, there has been no live thoroughbred racing in the state, leaving just standardbred racing, which is held solely at Plainridge Park Casino.

In 2011, the Expanded Gaming Act was established, allowing casinos to operate within the state. Of the revenue to be levied by the government on these future casinos, a percentage was allocated towards the Race Horse Development Fund (RHDF), which aimed to support members of the horse racing industry. A committee was developed to determine how these funds should be divided between thoroughbred and standardbred industry members. In 2023, 80% of the disbursements from this fund were paid into purse contributions, increasing the purse size for races within the state; 16% went to breeders, and 4% went to horsemen for health and other benefits.

Table 32, 2023 Distribution of the Race Horse Development Fund – Does not reflect thoroughbred purse supplement, which was not paid out (The Innovation Group)

2023 RHDF Distributions			
Entity	**$ Amount**	**% of disbursements**	**Statutory Purpose**
Harness Horsemen's Assn	$398,951	2.14%	Health & Welfare of Harness Horsemen
Massachusetts Thoroughbred Breeders Assn	$783,390	4.20%	Thoroughbred Breeders Program
New England Horsemen's Benevolent	$413,464	2.22%	Health & Welfare of Thoroughbred Horsemen
Plainville Gaming and Redevelopment LLC	$14,780,550	79.22%	Standardbred Live Racing Purses
Standardbred Owners of Massachusetts	$2,281,053	12.23%	Standardbred Breeders Program
Grand Total	**$18,657,408**		

[41] American Gaming Association. (2023, May). *State of the States 2023*. *https://www.americangaming.org/wp-content/uploads/2023/05/AGA-State-of-the-States-2023.pdf*
[42] Ohio and Kentucky's harness racing industries are indirectly funded by gaming revenue. In Ohio, a small portion of casino tax revenues are distributed to the Ohio State Racing Commission, which in turn provides support to the industry. In Kentucky, a portion of tax revenues from historical horse racing machines are redistributed back into the industry, although this is not a casino game.

With there being no live thoroughbred racing in Massachusetts in recent years, the thoroughbred portion of the fund continues to grow, and as of 2023, its unexpended funds had reached $23.4 million.

Table 33, RHDF Totals through December 2023 (The Innovation Group)

Race Horse Development Fund Totals (Through December 2023)			
	Casino Revenue and Fees	**Amount Distributed**	**Balance in Fund**
Thoroughbred	$49,860,338	$26,425,483	$23,434,855
Standardbred	$97,774,034	$97,664,116	$109,917
Totals	$147,634,372	$124,089,600	$23,544,772

Even with the absence of live thoroughbred racing, the harness racing industry has made a significant contribution to the state's economy. In 2022, the harness racing industry generated a total of 950 jobs, 713 being directly attributed and 238 being indirect or induced. This industry produced a total of $43 million in labour income, $61 million in value-added, and $98 million in output. [43]

Table 34, Economic Impacts of Harness Racing in Massachusetts (The Innovation Group)

Total Economic Impact to Massachusetts ($Million USD)			
	Direct	**Indirect and Induced**	**Total**
Employment	713	238	950
Labour Income	$27	$17	$43
Value Added	$33	$28	$61
Output	$54	$44	$98

2.2 New York

In New York, the horse racing industry is funded through a combination of purses and breeders awards, which are funded by the handle from races and a portion of the revenue generated by VLTs. A portion of the revenue generated by VLTs is distributed between education, racetracks, and racing concerns. Since the inception of the Video Lottery Gaming Act, when this began, the percentage of the funds being transferred to education has gradually decreased, with the amount going to racetracks increasing and the amount for racing concerns remaining constant at 10%.

Between 2011 and 2018, the amount of VLT revenue redistributed to these three areas has annually ranged between $966 million USD and $1.05 billion USD. In 2018, over half (55%) of the state's VLT revenue came from Yonkers Raceway & Empire City Casino, and 16% came from Saratoga Race Course, meaning that 71% of this revenue came from two of the state's seven racinos. The racing concerns portion allocated 8.75% to race purses and 1.25% to breeder awards.

[43] Data surrounding RHDF and economic impacts derived from: The Innovation Group. (2024, June). *Economic Impact Study, Massachusetts Harness Horseracing Industry, Plainville, MA (Project #006-23).*

Table 35, VLT Revenue Distribution (x1,000,000 USD) (Empire State Harness Horse Alliance)

VLT Revenue Distribution							
CY	**Education Contribution ($ Million USD)**	**Education Contribution (% of total)**	**Racetrack ($ Million USD)**	**Racetrack (% of total)**	**Racing Concerns ($ Million USD)**	**Racing Concerns (% of total)**	**Total ($ Million USD)**
2008	$398.9	47%	**$362.4**	43%	**$84.6**	10%	$845.9
2009	$404.6	47%	**$412.8**	45%	**$90.8**	10%	$908.2
2010	$449.6	46%	**$425.2**	44%	**$97.2**	10%	$972.0
2011	$496.5	47%	**$446.7**	43%	**$104.8**	10%	$1047.9
2012	$465.2	47%	**$434.8**	43%	**$100.0**	10%	$1000.0
2013	$469.7	47%	**$438.3**	43%	**$100.9**	10%	$1009.0
2014	$450.2	47%	**$419.2**	43%	**$96.6**	10%	$966.0
2015	$462.7	47%	**$430.4**	43%	**$99.2**	10%	$992.4
2016	$481.7	47%	**$446.7**	43%	**$103.2**	10%	$1031.5
2017	$445.6	45%	**$453.2**	45%	**$99.9**	10%	$998.7
2018	$432.7	44%	**$444.5**	46%	**$97.5**	10%	$974.7

Between 2008 and 2018, the gross amount of harness racing purses fluctuated between $94 million and $122 million, as shown in Table 37. Breeder awards have significantly declined from 2008 to 2018, more than halving, as shown in Table 38. This decline is attributed to the drastic decline of New York City Off-Track Betting Corporations (OTBs) which allocated a portion of revenue to breeder awards.

Table 36, Gross Purses Paid by Harness Racetracks Across NY (Empire State Harness Horse Alliance)

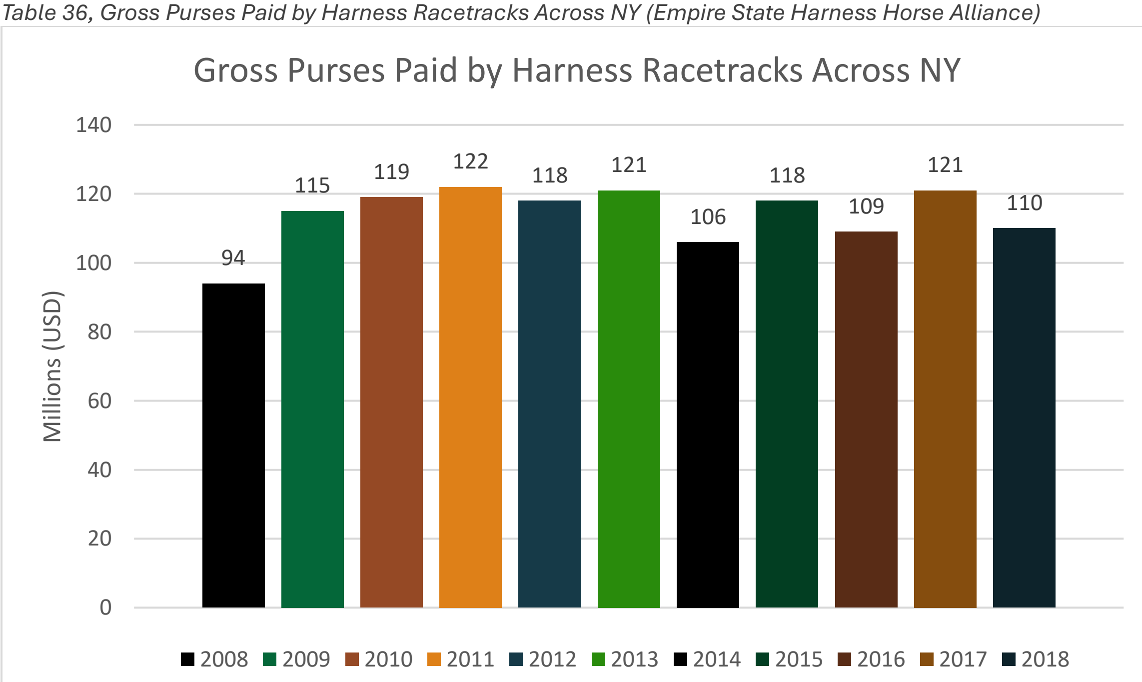
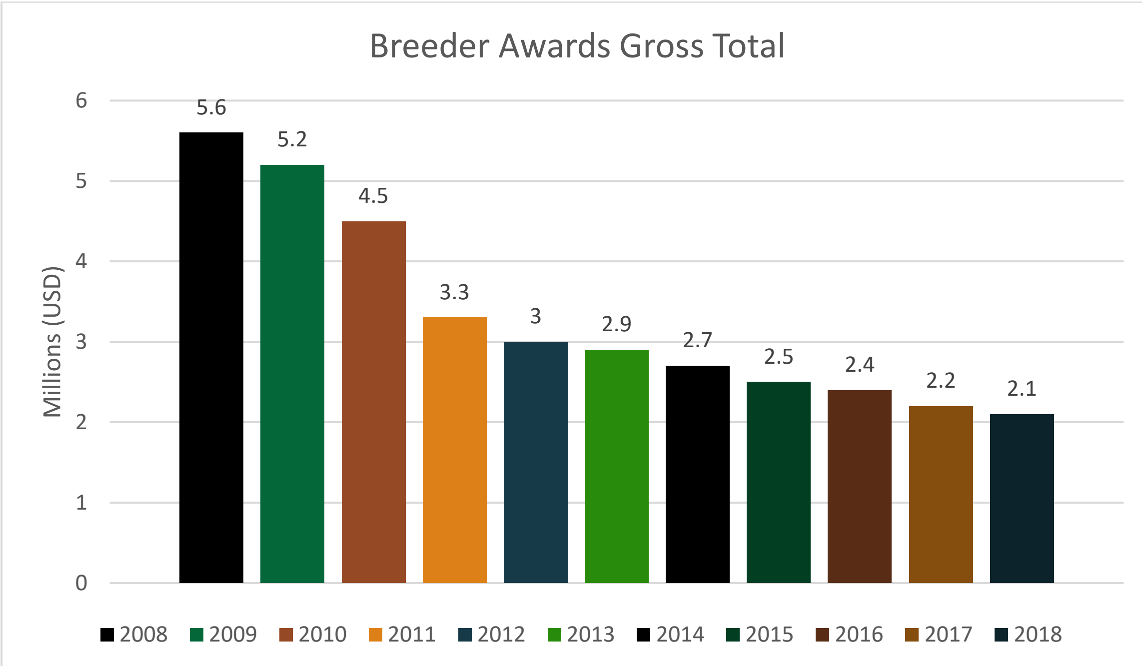


Table 37, Gross Total of Breeder Awards (Empire State Harness Horse Alliance)



In total, New York's Harness Racing Industry is responsible for $461.5 million (USD) in total economic impact, with $249.1 million being directly attributable and $212.4 million being indirect. It also created 3,949 FTE (1,115 direct jobs and 2,834 indirect).[44]

Table 38, Total Economic Impact of New York's Harness Racing Industry (2018) (Empire State Harness Horse Alliance)

Total Economic Impact in Millions of USD (2018)	
Direct Impact	$249.1
Indirect Impact	$212.4
Total Impact	**$461.5**

Table 39, Total Jobs Impact of New York's Harness Racing Industry (2018) (Empire State Harness Horse Alliance)

Total Jobs Impact (2018)	
Direct Jobs	1,115
Indirect Jobs	2,834
Total Jobs	**3,949**

2.3 Pennsylvania

Pennsylvania is another state that has a fund to support its horse racing industry. Created in 2004, the Pennsylvania Race Horse Development Fund provides funding to increase purse sizes and support the members of its horse racing industry. With this support, the industry is able to

[44] JMS Advisors. (2020, September). *Economic Impact Study New York Standardbred Horseracing Industry.* Prepared for Empire State Harness Horse Alliance.

generate increased economic benefits, which include generating tax revenue, creating jobs, and supporting adjacent industries such as tourism and agriculture.

In Pennsylvania, casino revenue from slot machines is taxed at 55%, with 12% of this tax being redistributed to the Pennsylvania Race Horse Development Fund. Of the funds provided by this racehorse development fund, 89% is redistributed back into local economies.

The total economic impact of horse racing for the state is $721.5 million USD. This includes $527 million in direct impacts and 279 million in indirect and induced impacts. The industry also creates 7,385 direct jobs and 8,023 in indirect and induced efforts, for a total of 15,982. These figures include Pennsylvania's large thoroughbred racing industry in addition to its standardbred racing industry. In addition to these impacts, the horse racing industry has other qualitative benefits, such as protecting greenspace.[45]

2.4 Ohio

In 1975, the Ohio Standardbred Development Fund was created, providing financial support to Ohio's standardbred racing industry, with the majority of it being dispersed to Ohio Sires Stakes. This fund primarily receives revenue from two sources: a portion of the tax revenues generated by harness racing track wagers and also disbursements from the Ohio State Racing Commission (OSRC). OSRC receives a small portion of the taxes paid by casinos, meaning that Ohio's casino tax revenues indirectly fund the state's harness racing industry.[46] In 2023, OSRC dispersed over $1.1 million USD to the Ohio Standardbred Development Fund.[47]

Notably, Ohio's harness racing industry is larger than its thoroughbred industry, unlike some of its neighbouring states such as Kentucky. In 2023, there were 6,658 standardbred races held in the state, compared to its 2,385 thoroughbred races. These standardbred races had a total purse of $90 million USD, whereas total thoroughbred purses for the year amounted to $49 million USD. In 2023, the total handle for standardbred races was over $395 million USD.[48]

The Ohio Harness Horsemen's Association (OHHA) is the leading industry association for standardbred horse owners, breeders, trainers, drivers, and fans in Ohio. This association oversees 22 of the state's 67 racing fairs and provides coordinators to support these fairs. This association is

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[45] Pennsylvania Horse Racing Association. (n.d.). *The Economic Benefits of Horse Racing in Pennsylvania*. https://pennhorseracing.com/pennsylvania-economic-impact/pennsylvania-economic-benefits/
[46] Ohio State Racing Commission. (n.d.). *Ohio Standardbred Development Fund*. https://racing.ohio.gov/standardbred
[47] Ohio State Racing Commission. (2024, March 15). *2023 Annual Report*. *https://racing.ohio.gov/wps/wcm/connect/gov/7de319ea-7dc8-483b-bd80-29d5dec64f4d/Ohio+State+Racing+Commission+2023+Annual+Report.pdf?MOD=AJPERES&CONVERT_TO=url&CACHEID=ROOTWORKSPACE.Z18_JQGCH4S04P41206HNUKVF31000-7de319ea-7dc8-483b-bd80-29d5dec64f4d-p0hP..k*
[48] Ohio State Racing Commission. (2024, April 11). *Study Commission on the Future of Gaming in Ohio*. *https://search-prod.lis.state.oh.us/api/v2/general_assembly_135/committees/cmte_h_future_gaming_1/meetings/cmte_h_future_gaming_1_2024-04-11-1000_1132/submissions/osrctestimony.pdf*

the primary advocate for the industry, protecting and promoting the success of the industry and its members.

2.5 Kentucky

Kentucky is one the most significant horse racing jurisdictions in the world. Kentucky is most well-known for its thoroughbred racing industry, with the Kentucky Derby being one of the most notable sporting events; however, it also has a significant standardbred racing industry.

Casinos are not legal in Kentucky, meaning the state does not have slot machines. Instead, Kentucky has historical horse racing machines (HHR), which are very similar to slot machines from the user's perspective but use actual results from past horse racing events. Most of these machines allow the player to automate the horse selection process, and only the final few seconds of the race are shown, making the experience very similar to that of a slot machine.[49] A small percentage of the taxes from these machines is directed to the Kentucky Breed Development Fund, which funds the Kentucky Sire Stakes, Kentucky Proud Series, and the state's three standardbred racing tracks.[50]

There is also a six percent tax when breeding a mare with a stallion. This sales tax is divided between three funds, with two supporting the thoroughbred racing industry and one funding the standardbred industry. Of this six percent sales tax, 13% is distributed to the Kentucky Standardbred Development Fund, which is a major source of funding for Kentucky Sires Stakes. In 2019, over $1.7 million USD was paid out in purse supplements from the Kentucky Standardbred Development Fund.

In addition to Kentucky Sire Stakes, there is also the Kentucky Proud Series, which is a series of standardbred stake races held across Kentucky's county fairs. Each race in this series has a minimum purse of $6,000 and a finals purse of $50,000. In 2023, the Proud series had a total purse of more than $780,000.

Kentucky has three harness racing tracks, with one being the Red Mile, the second-oldest harness racing track in the world. Red Mile has over 900 of these HHR machines and 175 TVs for simulcast racing. Kentucky's newest standardbred racing track, Cumberland Run, recently opened in 2023, a positive sign for the state's harness racing industry.

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[49] Mehaffey, J. (2023, January 16). *Historical Horse Racing Machines: How they Work*. https://www.bettingusa.com/historical-horse-racing-machines/

[50] Duff, B. (n.d.). *Historical horse racing machines changing industry*. https://harnessracingupdate.com/2024/07/21/historical-horse-racing-machines-changing-industry/#:~:text=In%202023%2C%20some%20%24693%20million,the%20Kentucky%20Breed%20Development%20Fund.

Appendix C. Economic Impact Analysis Results

INTERPROVINCIAL AND COUNTY ECONOMIC IMPACT MODEL OF THE CANADIAN ECONOMY

Model Version Modele_2019_V153_171024_Provincial.xlsb

Name of simulation Horse Racing in PEI

Date and Time 20-Nov-24 10:09:09 AM

SUMMARY OF RESULTS
INITIAL EXPENDITURES

NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
$0.0	**$82.4**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$82.4**

EMPLOYMENT (person-years)

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
DIRECT	0	457	0	0	0	0	0	0	0	0	0	0	0	**457**
INDIRECT	2	275	25	21	39	57	6	2	9	6	0	0	0	**443**
INDUCED	2	87	11	10	18	41	3	1	6	5	0	0	0	**183**
TOTAL	**4**	**820**	**35**	**31**	**57**	**98**	**8**	**3**	**15**	**11**	**0**	**0**	**0**	**1,083**

GROSS DOMESTIC PRODUCT

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
DIRECT	$0.0	$24.6	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$24.6**
INDIRECT	$0.3	$20.9	$2.3	$3.5	$5.3	$9.7	$0.9	$0.5	$1.6	$0.9	$0.0	$0.0	$0.0	**$45.8**
INDUCED	$0.2	$12.1	$1.1	$1.3	$2.4	$6.0	$0.3	$0.2	$1.1	$0.7	$0.0	$0.0	$0.0	**$25.4**
TOTAL	**$0.5**	**$57.6**	**$3.4**	**$4.7**	**$7.7**	**$15.8**	**$1.2**	**$0.7**	**$2.7**	**$1.6**	**$0.0**	**$0.0**	**$0.0**	**$95.8**

LABOUR INCOME

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
DIRECT	$0.0	$24.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$24.0**
INDIRECT	$0.2	$14.2	$1.7	$1.8	$3.4	$6.6	$0.5	$0.2	$0.9	$0.6	$0.0	$0.0	$0.0	**$30.0**
INDUCED	$0.1	$6.9	$0.7	$0.7	$1.4	$3.6	$0.2	$0.1	$0.6	$0.5	$0.0	$0.0	$0.0	**$14.8**
TOTAL	**$0.3**	**$45.2**	**$2.4**	**$2.5**	**$4.8**	**$10.2**	**$0.7**	**$0.3**	**$1.5**	**$1.1**	**$0.0**	**$0.0**	**$0.0**	**$68.8**

IMPORTS

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
DIRECT	$0.0	$25.9	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$25.9**
INDIRECT	$0.1	$11.2	$1.7	$2.5	$1.9	$2.4	$0.4	$0.2	$0.5	$0.2	$0.0	$0.0	$0.0	**$21.1**
INDUCED	$0.1	$8.9	$0.6	$1.1	$1.0	$2.2	$0.2	$0.1	$0.4	$0.3	$0.0	$0.0	$0.0	**$14.9**
TOTAL	**$0.2**	**$46.1**	**$2.3**	**$3.6**	**$2.9**	**$4.6**	**$0.6**	**$0.3**	**$0.9**	**$0.5**	**$0.0**	**$0.0**	**$0.0**	**$61.9**

GOVERNMENT TAX REVENUES

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
DIRECT	$0.0	$3.7	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$3.7**
INDIRECT	$0.0	$3.7	$0.3	$0.6	$0.6	$1.6	$0.2	$0.1	$0.3	$0.2	$0.0	$0.0	$0.0	**$7.5**
INDUCED	$0.0	$4.0	$0.3	$0.4	$0.6	$1.7	$0.1	$0.0	$0.2	$0.2	$0.0	$0.0	$0.0	**$7.5**
TOTAL	**$0.1**	**$11.4**	**$0.6**	**$0.9**	**$1.3**	**$3.3**	**$0.2**	**$0.1**	**$0.5**	**$0.3**	**$0.0**	**$0.0**	**$0.0**	**$18.7**

PARAFISCALITY REVENUES

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
DIRECT	$0.0	$0.7	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.7**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
INDIRECT	$0.0	$0.3	$0.0	$0.0	$0.4	$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$1.0**
INDUCED	$0.0	$0.1	$0.0	$0.0	$0.2	$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.4**
TOTAL	**$0.0**	**$1.2**	**$0.0**	**$0.0**	**$0.6**	**$0.2**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$2.2**

DIRECT IMPACTS

Direct Employment by Industry

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
1 Crops, greenhouses, garden centers	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
2 Animal production and aquaculture	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
3 Forestry and logging	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
4 Fishing, hunting and trapping	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
5 Support activities for agriculture and forestry	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
6 Oil and gas extraction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
7 Coal mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
8 Iron ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
9 Gold and silver ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
10 Other metallic ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
11 Non-metallic ore (including diamond and gravel) mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
12 Potash mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
13 Support activities for oil and gas extraction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
14 Support activities for mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
15 Electric power generation, transmission and distribution, natural gas, water and sewer	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
16 Residential building construction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
17 Non-residential building construction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
18 Transportation, oil and gas, electricity and other Engineering construction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
19 Repair construction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
20 Other activities of the construction Industry	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
21 Animal food, sugar, confectionery, cereals and canning manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
22 Dairy product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
23 Meat product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
24 Seafood product Preparation and Packaging	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
25 Bakery, tortillas and miscellaneous Food manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
26 Beverage and tobacco manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
27 Textile and textile product mills, clothing and leather products	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
28 Sawmills	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
29 Plywood	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
30 Doors & windows and other wood products manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
31 Pulp, paper, paperboard and converted paper product mills	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
32 Printing and related support activities	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
33 Petroleum and coal products manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
34 Basic chemical manufacturing, resin, rubber, fibers	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
35 Pesticides, fertilizer and ther agricultural chemical manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
36 Pharmaceutical and medicine manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
37 Paint, adhesives, soap and miscellaneous chemical product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
38 Plastic and rubber product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
39 Cement, concrete and mscellaneous non-metallic mineral product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
40 Iron and steel mills, steel, alumina, aluminum, non-ferrous metal products, foundries	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
41 Forging and stamping, cutlery, hand tools and other fabricated metal product	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
42 Architectural and structural metals manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
43 Boiler, tank and shipping container manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
44 Hardware, spring, machine shops, coating and engraving manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
45 Agricultural, construction and mining machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
46 Industrial machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
47 Commercial and service industry machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
48 Ventilation, heating, air-conditioning, commercial refrigeration equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
49 Metalworking machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
50 Engine, turbine and power transmission equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
51 Other general-purpose machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
52 Computer and peripherals, communications and electronic components manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
53 Electrical and lighting, equipment and components, household appliance manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
54 Motor vehicle manufacturing, including heavy trucks	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
55 Motor vehicle body, trailer and parts manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
56 Aerospace product and parts manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
57 Railroad rolling stock manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
58 Ship and boat building	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
59 Other transportation equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
60 Household, office and institutional furniture, kitchen cabinet and other products	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
61 Medical equipment and supplies and other miscellaneous manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
62 Wholesale trade	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
63 Retail trade	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
64 Air transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
65 Rail transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
66 Water transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
67 Truck transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
68 Transit and ground passenger transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
69 Urban transit, ground passenger and scenic, sightseeing and tourism transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
70 Taxi and limousine service	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
71 Crude oil and natural gas pipeline transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
72 Support activities for transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
73 Postal service	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
74 Couriers and messengers	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
75 Warehousing and storage	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
76 Newspaper, periodical, book and software publishers	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
77 Motion picture and video industries (including exhibition) and sound recording industries	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
78 Radio and television broadcasting, pay television, telecommunications, hosting, information, etc.	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
79 Monetary authorities - central bank	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
80 Banking, credit unions and other depository credit intermediation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
81 Financial investment services, funds and other financial vehicles	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
82 Insurance carriers, agencies, brokerages and other insurance related activities	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
83 Lessors of real estate, real estate agents and brokers and activities related to real estate	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
84 Owner-occupied dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
85 Rental and leasing services of automotive and other miscellaneous equipment	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
86 Lessors of non-financial intangible assets (except copyrighted works)	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
87 Professional services (legal, accounting, management, research, scientific, advertising, etc.)	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
88 Architectural, engineering and related services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
89 Business support services (holding, buildings and dwellings, administrative, security, etc.)	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
90 Waste management and remediation services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
91 Educational services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
92 Offices of physicians, dentists and miscellaneous ambulatory health care services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
93 Nursing and residential care facilities	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
94 Social assistance	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
95 Performing arts, spectator sports and related industries, and heritage institutions	0	457	0	0	0	0	0	0	0	0	0	0	0	**457**
96 Amusement, recreation and gambling industries	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
97 Traveller accommodation, RV parks, recreational camps, and rooming houses	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
98 Food services and drinking places	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
99 Repair and maintenance (including automotive)	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
100 Personal care services and other personal services, funeral services, dry cleaning and laundry	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
101 Professional and similar organizations	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
102 Private households	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
103 Transportation margins	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
104 Educational services (except universities)	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
105 Universities	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
106 Ambulatory health care services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
107 Social assistance	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
108 Arts, entertainment and recreation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
109 Grant-making, civic, and professional, similar and religious organizations	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
110 Other non-profit institutions serving households	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
111 Schools, colleges, universities and other educational services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
112 Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
113 Nursing and residential care facilities	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
114 Defence services and other federal government services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
115 Other provincial and territorial government services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
116 Other municipal and aboriginal government services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
117 Households	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
Total	**0**	**457**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**457**

Direct Gross Domestic Product

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
Taxes on products	$0.0	$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.1**
Subsidies on products	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.0**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
Subsidies on production	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.0**
Taxes on production	$0.0	$0.5	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.5**
Wages and salaries	$0.0	$22.4	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$22.4**
Employers' social contributions	$0.0	$1.4	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$1.4**
Gross mixed income	$0.0	$0.2	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.2**
Gross operating surplus	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.0**
Total	**$0.0**	**$24.6**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$24.6**

Direct Imports

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
Total	**$0.0**	**$25.9**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$25.9**

Direct Government Tax Revenues

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
Federal														
Federal Income Tax	$0.0	$1.6	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$1.6**
GST & other Indirect taxes	$0.0	$0.2	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.2**
Federal Tax on Corporate Income	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.0**
Total Federal tax Revenues	**$0.0**	**$1.8**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$1.8**
Province														
Provincial Income Tax	$0.0	$1.6	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$1.6**
PST & other Indirect taxes	$0.0	$0.4	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.4**
Provincial Tax on Corporate Income	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.0**
Total Provincial Tax Revenues	**$0.0**	**$2.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$2.0**
Municipalities														
Property taxes	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**
Total	**$0.0**	**$3.7**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$3.7**

Direct Parafiscality

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
Federal	$0.0	$0.7	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.7**
Provincial	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.0**
Total	**$0.0**	**$0.7**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.7**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**

INDIRECT IMPACTS

Indirect Employment by Industry

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
1 Crops, greenhouses, garden centers	0	18	2	1	5	1	1	0	1	0	0	0	0	**30**
2 Animal production and aquaculture	0	49	2	1	7	1	1	0	0	0	0	0	0	**61**
3 Forestry and logging	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
4 Fishing, hunting and trapping	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
5 Support activities for agriculture and forestry	0	4	1	0	1	0	0	0	0	0	0	0	0	**6**
6 Oil and gas extraction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
7 Coal mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
8 Iron ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
9 Gold and silver ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
10 Other metallic ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
11 Non-metallic ore (including diamond and gravel) mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
12 Potash mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
13 Support activities for oil and gas extraction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
14 Support activities for mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
15 Electric power generation, transmission and distribution, natural gas, water and sewer	0	3	0	1	1	0	0	0	0	0	0	0	0	**5**
16 Residential building construction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
17 Non-residential building construction	0	11	0	0	0	0	0	0	0	0	0	0	0	**11**
18 Transportation, oil and gas, electricity and other Engineering construction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
19 Repair construction	0	1	0	1	1	1	0	0	0	0	0	0	0	**4**
20 Other activities of the construction Industry	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
21 Animal food, sugar, confectionery, cereals and canning manufacturing	0	2	2	2	1	1	0	0	0	0	0	0	0	**8**
22 Dairy product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
23 Meat product manufacturing	0	1	1	1	0	1	0	0	0	0	0	0	0	**4**
24 Seafood product Preparation and Packaging	0	0	1	0	0	0	0	0	0	0	0	0	0	**1**
25 Bakery, tortillas and miscellaneous Food manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
26 Beverage and tobacco manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
27 Textile and textile product mills, clothing and leather products	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
28 Sawmills	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
29 Plywood	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
30 Doors & windows and other wood products manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
31 Pulp, paper, paperboard and converted paper product mills	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
32 Printing and related support activities	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
33 Petroleum and coal products manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
34 Basic chemical manufacturing, resin, rubber, fibers	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
35 Pesticides, fertilizer and ther agricultural chemical manufacturing	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
36 Pharmaceutical and medicine manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
37 Paint, adhesives, soap and miscellaneous chemical product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
38 Plastic and rubber product manufacturing	0	0	0	0	1	1	0	0	0	0	0	0	0	**2**
39 Cement, concrete and mscellaneous non-metallic mineral product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
40 Iron and steel mills, steel, alumina, aluminum, non-ferrous metal products, foundries	0	0	0	0	0	1	0	0	0	0	0	0	0	**2**
41 Forging and stamping, cutlery, hand tools and other fabricated metal product	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
42 Architectural and structural metals manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
43 Boiler, tank and shipping container manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
44 Hardware, spring, machine shops, coating and engraving manufacturing	0	0	0	0	0	1	0	0	0	0	0	0	0	**1**
45 Agricultural, construction and mining machinery manufacturing	0	10	0	0	1	1	0	0	0	0	0	0	0	**12**
46 Industrial machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
47 Commercial and service industry machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
48 Ventilation, heating, air-conditioning, commercial refrigeration equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
49 Metalworking machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
50 Engine, turbine and power transmission equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
51 Other general-purpose machinery manufacturing	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
52 Computer and peripherals, communications and electronic components manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
53 Electrical and lighting, equipment and components, household appliance manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
54 Motor vehicle manufacturing, including heavy trucks	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
55 Motor vehicle body, trailer and parts manufacturing	0	10	0	0	0	1	0	0	0	0	0	0	0	**11**
56 Aerospace product and parts manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
57 Railroad rolling stock manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
58 Ship and boat building	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
59 Other transportation equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
60 Household, office and institutional furniture, kitchen cabinet and other products	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
61 Medical equipment and supplies and other miscellaneous manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
62 Wholesale trade	0	10	2	2	3	6	0	0	1	1	0	0	0	**24**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
63 Retail trade	0	11	2	1	1	3	0	0	0	0	0	0	0	**20**
64 Air transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
65 Rail transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
66 Water transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
67 Truck transportation	0	2	1	1	1	1	0	0	0	0	0	0	0	**6**
68 Transit and ground passenger transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
69 Urban transit, ground passenger and scenic, sightseeing and tourism transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
70 Taxi and limousine service	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
71 Crude oil and natural gas pipeline transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
72 Support activities for transportation	0	0	0	0	0	1	0	0	0	0	0	0	0	**2**
73 Postal service	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
74 Couriers and messengers	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
75 Warehousing and storage	0	0	0	0	0	1	0	0	0	0	0	0	0	**1**
76 Newspaper, periodical, book and software publishers	0	1	0	0	0	1	0	0	0	0	0	0	0	**2**
77 Motion picture and video industries (including exhibition) and sound recording industries	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
78 Radio and television broadcasting, pay television, telecommunications, hosting, information, etc.	0	1	0	0	0	1	0	0	0	0	0	0	0	**3**
79 Monetary authorities - central bank	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
80 Banking, credit unions and other depository credit intermediation	0	3	0	0	1	2	0	0	0	0	0	0	0	**7**
81 Financial investment services, funds and other financial vehicles	0	2	0	0	0	0	0	0	0	0	0	0	0	**2**
82 Insurance carriers, agencies, brokerages and other insurance related activities	0	4	0	0	1	2	0	0	0	0	0	0	0	**7**
83 Lessors of real estate, real estate agents and brokers and activities related to real estate	0	1	0	0	0	1	0	0	0	0	0	0	0	**3**
84 Owner-occupied dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
85 Rental and leasing services of automotive and other miscellaneous equipment	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
86 Lessors of non-financial intangible assets (except copyrighted works)	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
87 Professional services (legal, accounting, management, research, scientific, advertising, etc.)	0	33	1	1	4	8	1	0	1	1	0	0	0	**50**
88 Architectural, engineering and related services	0	1	0	0	0	1	0	0	0	0	0	0	0	**2**
89 Business support services (holding, buildings and dwellings, administrative, security, etc.)	0	4	1	1	3	6	0	0	1	0	0	0	0	**17**
90 Waste management and remediation services	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
91 Educational services	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
92 Offices of physicians, dentists and miscellaneous ambulatory health care services	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
93 Nursing and residential care facilities	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
94 Social assistance	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
95 Performing arts, spectator sports and related industries, and heritage institutions	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
96 Amusement, recreation and gambling industries	0	2	0	0	0	0	0	0	0	0	0	0	0	**3**
97 Traveller accommodation, RV parks, recreational camps, and rooming houses	0	29	2	1	0	1	0	0	0	0	0	0	0	**34**
98 Food services and drinking places	0	22	2	2	1	2	0	0	0	0	0	0	0	**29**
99 Repair and maintenance (including automotive)	0	13	0	0	0	3	0	0	1	0	0	0	0	**18**
100 Personal care services and other personal services, funeral services, dry cleaning and laundry	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
101 Professional and similar organizations	0	16	0	0	0	1	0	0	0	0	0	0	0	**17**
102 Private households	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
103 Transportation margins	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
104 Educational services (except universities)	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
105 Universities	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
106 Ambulatory health care services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
107 Social assistance	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
108 Arts, entertainment and recreation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
109 Grant-making, civic, and professional, similar and religious organizations	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
110 Other non-profit institutions serving households	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
111 Schools, colleges, universities and other educational services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
112 Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
113 Nursing and residential care facilities	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
114 Defence services and other federal government services	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
115 Other provincial and territorial government services	0	2	0	0	0	0	0	0	0	0	0	0	0	**2**
116 Other municipal and aboriginal government services	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
117 Households	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
Total	**2**	**275**	**25**	**21**	**39**	**57**	**6**	**2**	**9**	**6**	**0**	**0**	**0**	**443**

Indirect Gross Domestic Product

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
Taxes on products	$0.0	$0.3	$0.0	$0.0	$0.1	$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.7**
Subsidies on products	$0.0	-$0.3	-$0.2	$0.0	-$0.2	-$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**-$0.9**
Subsidies on production	$0.0	-$0.6	$0.0	$0.0	-$0.2	-$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**-$0.9**
Taxes on production	$0.0	$0.9	$0.1	$0.2	$0.2	$0.3	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	$0.0	**$1.8**
Wages and salaries	$0.1	$10.4	$1.3	$1.4	$2.3	$5.3	$0.3	$0.1	$0.7	$0.5	$0.0	$0.0	$0.0	**$22.5**
Employers' social contributions	$0.0	$0.9	$0.2	$0.2	$0.4	$0.7	$0.0	$0.0	$0.1	$0.1	$0.0	$0.0	$0.0	**$2.6**
Gross mixed income	$0.0	$2.9	$0.2	$0.1	$0.7	$0.6	$0.1	$0.1	$0.1	$0.1	$0.0	$0.0	$0.0	**$4.9**
Gross operating surplus	$0.1	$6.3	$0.7	$1.5	$2.0	$2.9	$0.3	$0.3	$0.7	$0.3	$0.0	$0.0	$0.0	**$15.1**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
Total	**$0.3**	**$20.9**	**$2.3**	**$3.5**	**$5.3**	**$9.7**	**$0.9**	**$0.5**	**$1.6**	**$0.9**	**$0.0**	**$0.0**	**$0.0**	**$45.8**

Indirect Imports

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
Total	$0.1	$11.2	$1.7	$2.5	$1.9	$2.4	$0.4	$0.2	$0.5	$0.2	$0.0	$0.0	$0.0	**$21.1**

Indirect Government Tax Revenues

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
Federal														
Federal Income Tax	$0.0	$1.0	$0.1	$0.1	$0.2	$0.4	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	$0.0	**$2.0**
GST & other Indirect taxes	$0.0	$0.2	$0.0	$0.1	$0.1	$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.5**
Federal Tax on Corporate Income	$0.0	$1.0	$0.1	$0.1	$0.2	$0.4	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	$0.0	**$1.9**
Total Federal tax Revenues	**$0.0**	**$2.1**	**$0.2**	**$0.3**	**$0.4**	**$1.0**	**$0.1**	**$0.0**	**$0.2**	**$0.1**	**$0.0**	**$0.0**	**$0.0**	**$4.4**
Province														
Provincial Income Tax	$0.0	$0.9	$0.1	$0.1	$0.2	$0.2	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$1.7**
PST & other Indirect taxes	$0.0	$0.1	-$0.1	$0.1	-$0.1	$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.2**
Provincial Tax on Corporate Income	$0.0	$0.5	$0.1	$0.1	$0.1	$0.3	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$1.2**
Total Provincial Tax Revenues	**$0.0**	**$1.6**	**$0.1**	**$0.3**	**$0.2**	**$0.6**	**$0.1**	**$0.0**	**$0.1**	**$0.1**	**$0.0**	**$0.0**	**$0.0**	**$3.1**
Municipalities														
Property taxes	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**
Total	**$0.0**	**$3.7**	**$0.3**	**$0.6**	**$0.6**	**$1.6**	**$0.2**	**$0.1**	**$0.3**	**$0.2**	**$0.0**	**$0.0**	**$0.0**	**$7.5**

Indirect Parafiscality

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
Federal	$0.0	$0.3	$0.0	$0.0	$0.1	$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.6**
Provincial	$0.0	$0.0	$0.0	$0.0	$0.4	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.4**
Total	**$0.0**	**$0.3**	**$0.0**	**$0.0**	**$0.4**	**$0.1**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$1.0**

INDUCED IMPACTS

Induced Employment by Industry

NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
1 Crops, greenhouses, garden centers	0	2	0	0	0	1	0	0	0	0	0	0	0	**3**
2 Animal production and aquaculture	0	1	0	0	0	0	0	0	0	0	0	0	0	**2**
3 Forestry and logging	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
4 Fishing, hunting and trapping	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
5 Support activities for agriculture and forestry	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
6 Oil and gas extraction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
7 Coal mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
8 Iron ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
9 Gold and silver ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
10 Other metallic ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
11 Non-metallic ore (including diamond and gravel) mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
12 Potash mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
13 Support activities for oil and gas extraction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
14 Support activities for mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
15 Electric power generation, transmission and distribution, natural gas, water and sewer	0	1	0	0	0	0	0	0	0	0	0	0	0	**2**
16 Residential building construction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
17 Non-residential building construction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
18 Transportation, oil and gas, electricity and other Engineering construction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
19 Repair construction	0	1	0	0	0	1	0	0	0	0	0	0	0	**3**
20 Other activities of the construction Industry	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
21 Animal food, sugar, confectionery, cereals and canning manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
22 Dairy product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
23 Meat product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
24 Seafood product Preparation and Packaging	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
25 Bakery, tortillas and miscellaneous Food manufacturing	0	1	0	0	0	0	0	0	0	0	0	0	0	**2**
26 Beverage and tobacco manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
27 Textile and textile product mills, clothing and leather products	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
28 Sawmills	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
29 Plywood	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
30 Doors & windows and other wood products manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
31 Pulp, paper, paperboard and converted paper product mills	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
32 Printing and related support activities	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
33 Petroleum and coal products manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
34 Basic chemical manufacturing, resin, rubber, fibers	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
35 Pesticides, fertilizer and ther agricultural chemical manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
36 Pharmaceutical and medicine manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
37 Paint, adhesives, soap and miscellaneous chemical product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
38 Plastic and rubber product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
39 Cement, concrete and mscellaneous non-metallic mineral product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
40 Iron and steel mills, steel, alumina, aluminum, non-ferrous metal products, foundries	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
41 Forging and stamping, cutlery, hand tools and other fabricated metal product	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
42 Architectural and structural metals manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
43 Boiler, tank and shipping container manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
44 Hardware, spring, machine shops, coating and engraving manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
45 Agricultural, construction and mining machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
46 Industrial machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
47 Commercial and service industry machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
48 Ventilation, heating, air-conditioning, commercial refrigeration equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
49 Metalworking machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
50 Engine, turbine and power transmission equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
51 Other general-purpose machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
52 Computer and peripherals, communications and electronic components manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
53 Electrical and lighting, equipment and components, household appliance manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
54 Motor vehicle manufacturing, including heavy trucks	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
55 Motor vehicle body, trailer and parts manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
56 Aerospace product and parts manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
57 Railroad rolling stock manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
58 Ship and boat building	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
59 Other transportation equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
60 Household, office and institutional furniture, kitchen cabinet and other products	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
61 Medical equipment and supplies and other miscellaneous manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
62 Wholesale trade	0	2	1	1	2	3	0	0	0	0	0	0	0	**9**
63 Retail trade	0	24	2	2	2	6	0	0	1	1	0	0	0	**38**
64 Air transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
65 Rail transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
66 Water transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
67 Truck transportation	0	1	0	0	0	1	0	0	0	0	0	0	0	**2**
68 Transit and ground passenger transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
69 Urban transit, ground passenger and scenic, sightseeing and tourism transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
70 Taxi and limousine service	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
71 Crude oil and natural gas pipeline transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
72 Support activities for transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
73 Postal service	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
74 Couriers and messengers	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
75 Warehousing and storage	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
76 Newspaper, periodical, book and software publishers	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
77 Motion picture and video industries (including exhibition) and sound recording industries	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
78 Radio and television broadcasting, pay television, telecommunications, hosting, information, etc.	0	1	0	0	0	1	0	0	0	0	0	0	0	**3**
79 Monetary authorities - central bank	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
80 Banking, credit unions and other depository credit intermediation	0	2	0	0	1	2	0	0	0	0	0	0	0	**6**
81 Financial investment services, funds and other financial vehicles	0	1	0	0	0	1	0	0	0	0	0	0	0	**3**
82 Insurance carriers, agencies, brokerages and other insurance related activities	0	1	0	0	1	2	0	0	0	0	0	0	0	**4**
83 Lessors of real estate, real estate agents and brokers and activities related to real estate	0	5	0	0	0	1	0	0	0	0	0	0	0	**8**
84 Owner-occupied dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
85 Rental and leasing services of automotive and other miscellaneous equipment	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
86 Lessors of non-financial intangible assets (except copyrighted works)	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
87 Professional services (legal, accounting, management, research, scientific, advertising, etc.)	0	3	0	0	1	3	0	0	0	0	0	0	0	**8**
88 Architectural, engineering and related services	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
89 Business support services (holding, buildings and dwellings, administrative, security, etc.)	0	2	0	1	1	3	0	0	0	0	0	0	0	**8**
90 Waste management and remediation services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
91 Educational services	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
92 Offices of physicians, dentists and miscellaneous ambulatory health care services	0	2	0	0	0	1	0	0	0	0	0	0	0	**4**
93 Nursing and residential care facilities	0	3	0	0	0	0	0	0	0	0	0	0	0	**4**
94 Social assistance	0	2	0	0	0	0	0	0	0	0	0	0	0	**2**
95 Performing arts, spectator sports and related industries, and heritage institutions	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
96 Amusement, recreation and gambling industries	0	1	0	0	0	0	0	0	0	0	0	0	0	**2**
97 Traveller accommodation, RV parks, recreational camps, and rooming houses	0	2	0	0	0	1	0	0	0	0	0	0	0	**4**
98 Food services and drinking places	0	11	2	1	2	3	0	0	1	1	0	0	0	**21**
99 Repair and maintenance (including automotive)	0	2	0	0	0	1	0	0	0	0	0	0	0	**4**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
100 Personal care services and other personal services, funeral services, dry cleaning and laundry	0	2	0	0	0	1	0	0	0	0	0	0	0	**3**
101 Professional and similar organizations	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
102 Private households	0	2	0	0	0	0	0	0	0	0	0	0	0	**3**
103 Transportation margins	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
104 Educational services (except universities)	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
105 Universities	0	1	0	0	0	0	0	0	0	0	0	0	0	**2**
106 Ambulatory health care services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
107 Social assistance	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
108 Arts, entertainment and recreation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
109 Grant-making, civic, and professional, similar and religious organizations	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
110 Other non-profit institutions serving households	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
111 Schools, colleges, universities and other educational services	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
112 Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
113 Nursing and residential care facilities	0	1	0	0	0	0	0	0	0	0	0	0	0	**2**
114 Defence services and other federal government services	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
115 Other provincial and territorial government services	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
116 Other municipal and aboriginal government services	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
117 Households	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
Total	**2**	**87**	**11**	**10**	**18**	**41**	**3**	**1**	**6**	**5**	**0**	**0**	**0**	**183**

Induced Gross Domestic Product

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
Taxes on products	$0.0	$2.4	$0.1	$0.1	$0.2	$0.5	$0.0	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	**$3.5**
Subsidies on products	$0.0	-$0.1	$0.0	$0.0	$0.0	-$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**-$0.2**
Subsidies on production	$0.0	-$0.2	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**-$0.3**
Taxes on production	$0.0	$0.7	$0.1	$0.1	$0.2	$0.4	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$1.4**
Wages and salaries	$0.1	$3.3	$0.4	$0.5	$0.9	$2.4	$0.1	$0.1	$0.4	$0.3	$0.0	$0.0	$0.0	**$8.6**
Employers' social contributions	$0.0	$0.4	$0.1	$0.1	$0.2	$0.3	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	$0.0	**$1.1**
Gross mixed income	$0.0	$3.2	$0.2	$0.2	$0.3	$0.8	$0.1	$0.0	$0.1	$0.1	$0.0	$0.0	$0.0	**$5.1**
Gross operating surplus	$0.1	$2.4	$0.2	$0.3	$0.7	$1.6	$0.1	$0.1	$0.4	$0.2	$0.0	$0.0	$0.0	**$6.2**
Total	**$0.2**	**$12.1**	**$1.1**	**$1.3**	**$2.4**	**$6.0**	**$0.3**	**$0.2**	**$1.1**	**$0.7**	**$0.0**	**$0.0**	**$0.0**	**$25.4**

Induced Imports

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
Total	$0.1	$8.9	$0.6	$1.1	$1.0	$2.2	$0.2	$0.1	$0.4	$0.3	$0.0	$0.0	$0.0	**$14.9**

Induced Government Tax Revenues

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
Federal														
Federal Income Tax	$0.0	$0.3	$0.0	$0.1	$0.1	$0.3	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.9**
GST & other Indirect taxes	$0.0	$0.9	$0.1	$0.1	$0.1	$0.3	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	$0.0	**$1.6**
Federal Tax on Corporate Income	$0.0	$0.3	$0.0	$0.0	$0.1	$0.3	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.8**
Total Federal tax Revenues	**$0.0**	**$1.6**	**$0.1**	**$0.2**	**$0.3**	**$0.9**	**$0.0**	**$0.0**	**$0.1**	**$0.1**	**$0.0**	**$0.0**	**$0.0**	**$3.3**
Province														
Provincial Income Tax	$0.0	$0.3	$0.0	$0.0	$0.1	$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.7**
PST & other Indirect taxes	$0.0	$1.9	$0.1	$0.1	$0.2	$0.5	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$2.9**
Provincial Tax on Corporate Income	$0.0	$0.2	$0.0	$0.0	$0.0	$0.2	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.5**
Total Provincial Tax Revenues	**$0.0**	**$2.4**	**$0.2**	**$0.2**	**$0.4**	**$0.8**	**$0.0**	**$0.0**	**$0.1**	**$0.1**	**$0.0**	**$0.0**	**$0.0**	**$4.2**
Municipalities														
Property taxes	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.0**
Total	**$0.0**	**$4.0**	**$0.3**	**$0.4**	**$0.6**	**$1.7**	**$0.1**	**$0.0**	**$0.2**	**$0.2**	**$0.0**	**$0.0**	**$0.0**	**$7.5**

Induced Parafiscality

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
Federal	$0.0	$0.1	$0.0	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.3**
Provincial	$0.0	$0.0	$0.0	$0.0	$0.2	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.2**
Total	**$0.0**	**$0.1**	**$0.0**	**$0.0**	**$0.2**	**$0.1**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.4**

TOTAL IMPACTS

Total Employment by Industry

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	Canada
1 Crops, greenhouses, garden centers	0	19	2	2	5	2	1	1	1	0	0	0	0	**33**
2 Animal production and aquaculture	0	50	2	1	7	1	1	0	1	0	0	0	0	**63**
3 Forestry and logging	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
4 Fishing, hunting and trapping	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
5 Support activities for agriculture and forestry	0	4	1	0	1	0	0	0	0	0	0	0	0	**7**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
6 Oil and gas extraction	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
7 Coal mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
8 Iron ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
9 Gold and silver ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
10 Other metallic ore mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
11 Non-metallic ore (including diamond and gravel) mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
12 Potash mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
13 Support activities for oil and gas extraction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
14 Support activities for mining	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
15 Electric power generation, transmission and distribution, natural gas, water and sewer	0	3	0	2	1	1	0	0	0	0	0	0	0	**7**
16 Residential building construction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
17 Non-residential building construction	0	11	0	0	0	0	0	0	0	0	0	0	0	**11**
18 Transportation, oil and gas, electricity and other Engineering construction	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
19 Repair construction	0	3	0	1	1	2	0	0	0	0	0	0	0	**8**
20 Other activities of the construction Industry	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
21 Animal food, sugar, confectionery, cereals and canning manufacturing	0	2	2	2	2	1	0	0	0	0	0	0	0	**9**
22 Dairy product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
23 Meat product manufacturing	0	1	1	1	1	1	1	0	0	0	0	0	0	**5**
24 Seafood product Preparation and Packaging	0	0	1	0	0	0	0	0	0	0	0	0	0	**1**
25 Bakery, tortillas and miscellaneous Food manufacturing	0	1	0	0	0	1	0	0	0	0	0	0	0	**2**
26 Beverage and tobacco manufacturing	0	0	0	0	0	1	0	0	0	0	0	0	0	**2**
27 Textile and textile product mills, clothing and leather products	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
28 Sawmills	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
29 Plywood	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
30 Doors & windows and other wood products manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
31 Pulp, paper, paperboard and converted paper product mills	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
32 Printing and related support activities	0	1	0	0	0	1	0	0	0	0	0	0	0	**2**
33 Petroleum and coal products manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
34 Basic chemical manufacturing, resin, rubber, fibers	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
35 Pesticides, fertilizer and ther agricultural chemical manufacturing	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
36 Pharmaceutical and medicine manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
37 Paint, adhesives, soap and miscellaneous chemical product manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
38 Plastic and rubber product manufacturing	0	0	0	0	1	1	0	0	0	0	0	0	0	**3**
39 Cement, concrete and mscellaneous non-metallic mineral product manufacturing	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
40 Iron and steel mills, steel, alumina, aluminum, non-ferrous metal products, foundries	0	0	0	0	0	1	0	0	0	0	0	0	0	**2**
41 Forging and stamping, cutlery, hand tools and other fabricated metal product	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
42 Architectural and structural metals manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
43 Boiler, tank and shipping container manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
44 Hardware, spring, machine shops, coating and engraving manufacturing	0	0	0	0	0	1	0	0	0	0	0	0	0	**2**
45 Agricultural, construction and mining machinery manufacturing	0	10	0	0	1	1	0	0	0	0	0	0	0	**12**
46 Industrial machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
47 Commercial and service industry machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
48 Ventilation, heating, air-conditioning, commercial refrigeration equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
49 Metalworking machinery manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
50 Engine, turbine and power transmission equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
51 Other general-purpose machinery manufacturing	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
52 Computer and peripherals, communications and electronic components manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
53 Electrical and lighting, equipment and components, household appliance manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
54 Motor vehicle manufacturing, including heavy trucks	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
55 Motor vehicle body, trailer and parts manufacturing	0	10	0	0	0	1	0	0	0	0	0	0	0	**12**
56 Aerospace product and parts manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
57 Railroad rolling stock manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
58 Ship and boat building	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
59 Other transportation equipment manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
60 Household, office and institutional furniture, kitchen cabinet and other products	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
61 Medical equipment and supplies and other miscellaneous manufacturing	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
62 Wholesale trade	0	12	3	2	5	9	1	0	1	1	0	0	0	**34**
63 Retail trade	0	35	4	4	4	9	1	0	1	1	0	0	0	**59**
64 Air transportation	0	0	0	0	0	1	0	0	0	0	0	0	0	**2**
65 Rail transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
66 Water transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
67 Truck transportation	0	3	1	1	1	2	0	0	0	0	0	0	0	**8**
68 Transit and ground passenger transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
69 Urban transit, ground passenger and scenic, sightseeing and tourism transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
70 Taxi and limousine service	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
71 Crude oil and natural gas pipeline transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
72 Support activities for transportation	0	1	0	0	1	1	0	0	0	0	0	0	0	**4**
73 Postal service	0	1	0	0	0	0	0	0	0	0	0	0	0	**2**
74 Couriers and messengers	0	1	0	1	0	1	0	0	0	0	0	0	0	**2**
75 Warehousing and storage	0	0	0	0	0	1	0	0	0	0	0	0	0	**2**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
76 Newspaper, periodical, book and software publishers	0	1	0	0	0	1	0	0	0	0	0	0	0	**3**
77 Motion picture and video industries (including exhibition) and sound recording industries	0	0	0	0	0	1	0	0	0	0	0	0	0	**1**
78 Radio and television broadcasting, pay television, telecommunications, hosting, information, etc.	0	2	0	0	1	2	0	0	0	0	0	0	0	**5**
79 Monetary authorities - central bank	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
80 Banking, credit unions and other depository credit intermediation	0	6	1	1	1	5	0	0	0	0	0	0	0	**14**
81 Financial investment services, funds and other financial vehicles	0	3	0	0	0	2	0	0	0	0	0	0	0	**5**
82 Insurance carriers, agencies, brokerages and other insurance related activities	0	5	0	0	1	4	0	0	0	0	0	0	0	**11**
83 Lessors of real estate, real estate agents and brokers and activities related to real estate	0	7	1	0	1	2	0	0	0	0	0	0	0	**11**
84 Owner-occupied dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
85 Rental and leasing services of automotive and other miscellaneous equipment	0	1	0	0	0	1	0	0	0	0	0	0	0	**2**
86 Lessors of non-financial intangible assets (except copyrighted works)	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
87 Professional services (legal, accounting, management, research, scientific, advertising, etc.)	0	35	1	1	5	10	1	0	1	2	0	0	0	**57**
88 Architectural, engineering and related services	0	1	0	0	0	1	0	0	0	0	0	0	0	**3**
89 Business support services (holding, buildings and dwellings, administrative, security, etc.)	0	6	1	2	4	9	0	0	1	1	0	0	0	**25**
90 Waste management and remediation services	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
91 Educational services	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
92 Offices of physicians, dentists and miscellaneous ambulatory health care services	0	3	0	0	0	1	0	0	0	0	0	0	0	**5**
93 Nursing and residential care facilities	0	3	0	0	0	0	0	0	0	0	0	0	0	**4**
94 Social assistance	0	2	0	0	0	0	0	0	0	0	0	0	0	**2**
95 Performing arts, spectator sports and related industries, and heritage institutions	0	457	0	0	0	1	0	0	0	0	0	0	0	**459**
96 Amusement, recreation and gambling industries	0	3	1	0	0	1	0	0	0	0	0	0	0	**6**
97 Traveller accommodation, RV parks, recreational camps, and rooming houses	0	31	2	2	1	2	0	0	1	1	0	0	0	**38**
98 Food services and drinking places	1	33	4	3	2	6	0	0	1	1	0	0	0	**51**
99 Repair and maintenance (including automotive)	0	15	0	0	1	4	0	0	2	0	0	0	0	**22**
100 Personal care services and other personal services, funeral services, dry cleaning and laundry	0	2	0	0	0	1	0	0	0	0	0	0	0	**4**
101 Professional and similar organizations	0	16	0	0	0	1	0	0	0	0	0	0	0	**18**
102 Private households	0	2	0	0	0	0	0	0	0	0	0	0	0	**3**
103 Transportation margins	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
104 Educational services (except universities)	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
105 Universities	0	1	0	0	0	1	0	0	0	0	0	0	0	**3**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
106 Ambulatory health care services	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
107 Social assistance	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
108 Arts, entertainment and recreation	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
109 Grant-making, civic, and professional, similar and religious organizations	0	1	0	0	0	0	0	0	0	0	0	0	0	**2**
110 Other non-profit institutions serving households	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
111 Schools, colleges, universities and other educational services	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
112 Hospitals	0	0	0	0	0	0	0	0	0	0	0	0	0	**1**
113 Nursing and residential care facilities	0	1	0	0	0	0	0	0	0	0	0	0	0	**2**
114 Defence services and other federal government services	0	1	0	0	0	0	0	0	0	0	0	0	0	**1**
115 Other provincial and territorial government services	0	3	0	0	0	0	0	0	0	0	0	0	0	**3**
116 Other municipal and aboriginal government services	0	1	0	0	0	1	0	0	0	0	0	0	0	**3**
117 Households	0	0	0	0	0	0	0	0	0	0	0	0	0	**0**
Total	**4**	**820**	**35**	**31**	**57**	**98**	**8**	**3**	**15**	**11**	**0**	**0**	**0**	**1,083**

Total Gross Domestic Product

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
Taxes on products	$0.0	$2.9	$0.2	$0.2	$0.3	$0.6	$0.1	$0.0	$0.1	$0.1	$0.0	$0.0	$0.0	**$4.3**
Subsidies on products	$0.0	-$0.3	-$0.2	$0.0	-$0.2	-$0.2	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**-$1.1**
Subsidies on production	$0.0	-$0.8	$0.0	$0.0	-$0.2	-$0.1	$0.0	$0.0	-$0.1	$0.0	$0.0	$0.0	$0.0	**-$1.2**
Taxes on production	$0.0	$2.0	$0.1	$0.2	$0.4	$0.7	$0.1	$0.0	$0.1	$0.1	$0.0	$0.0	$0.0	**$3.7**
Wages and salaries	$0.2	$36.1	$1.7	$1.9	$3.2	$7.8	$0.4	$0.2	$1.1	$0.8	$0.0	$0.0	$0.0	**$53.5**
Employers' social contributions	$0.0	$2.7	$0.2	$0.3	$0.5	$1.0	$0.1	$0.0	$0.1	$0.1	$0.0	$0.0	$0.0	**$5.1**
Gross mixed income	$0.0	$6.4	$0.4	$0.3	$1.0	$1.4	$0.2	$0.1	$0.2	$0.2	$0.0	$0.0	$0.0	**$10.2**
Gross operating surplus	$0.2	$8.7	$1.0	$1.8	$2.7	$4.5	$0.4	$0.4	$1.1	$0.4	$0.0	$0.0	$0.0	**$21.2**
Total	**$0.5**	**$57.6**	**$3.4**	**$4.7**	**$7.7**	**$15.8**	**$1.2**	**$0.7**	**$2.7**	**$1.6**	**$0.0**	**$0.0**	**$0.0**	**$95.8**

Total Imports

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
Total	**$0.2**	**$46.1**	**$2.3**	**$3.6**	**$2.9**	**$4.6**	**$0.6**	**$0.3**	**$0.9**	**$0.5**	**$0.0**	**$0.0**	**$0.0**	**$61.9**

Total Government Tax Revenues

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
Federal														
Federal Income Tax	$0.0	$2.9	$0.2	$0.2	$0.3	$0.7	$0.0	$0.0	$0.1	$0.1	$0.0	$0.0	$0.0	**$4.5**
GST & other Indirect taxes	$0.0	$1.3	$0.0	$0.1	$0.2	$0.5	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	$0.0	**$2.2**
Federal Tax on Corporate Income	$0.0	$1.3	$0.1	$0.1	$0.2	$0.7	$0.0	$0.0	$0.1	$0.1	$0.0	$0.0	$0.0	**$2.8**
Total Federal tax Revenues	**$0.0**	**$5.5**	**$0.3**	**$0.4**	**$0.7**	**$1.9**	**$0.1**	**$0.1**	**$0.3**	**$0.2**	**$0.0**	**$0.0**	**$0.0**	**$9.5**
Province														
Provincial Income Tax	$0.0	$2.8	$0.1	$0.1	$0.3	$0.4	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	$0.0	**$3.9**
PST & other Indirect taxes	$0.0	$2.4	$0.0	$0.3	$0.1	$0.6	$0.1	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	**$3.6**
Provincial Tax on Corporate Income	$0.0	$0.7	$0.1	$0.1	$0.2	$0.4	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	$0.0	**$1.7**
Total Provincial Tax Revenues	**$0.0**	**$5.9**	**$0.3**	**$0.5**	**$0.6**	**$1.4**	**$0.1**	**$0.1**	**$0.1**	**$0.1**	**$0.0**	**$0.0**	**$0.0**	**$9.2**
Municipalities														
Property taxes	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**
Total	**$0.1**	**$11.4**	**$0.6**	**$0.9**	**$1.3**	**$3.3**	**$0.2**	**$0.1**	**$0.5**	**$0.3**	**$0.0**	**$0.0**	**$0.0**	**$18.7**

Total Parafiscality

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC	YT	NT	NU	**Canada**
Federal	$0.0	$1.2	$0.0	$0.0	$0.1	$0.2	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$1.6**
Provincial	$0.0	$0.0	$0.0	$0.0	$0.6	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	**$0.6**
Total	**$0.0**	**$1.2**	**$0.0**	**$0.0**	**$0.6**	**$0.2**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$0.0**	**$2.2**

TABLE 1

Employment by province

	Directs	Indirects	Induced	Total	Percentage
Newfoundland and Labrador	0	2	2	**4**	0.3%
Prince Edward Island	457	275	87	**820**	75.7%
Nova Scotia	0	25	11	**35**	3.3%
New Brunswick	0	21	10	**31**	2.9%
Quebec	0	39	18	**57**	5.3%
Ontario	0	57	41	**98**	9.0%
Manitoba	0	6	3	**8**	0.8%
Saskatchewan	0	2	1	**3**	0.3%
Alberta	0	9	6	**15**	1.4%
British Columbia	0	6	5	**11**	1.0%
Yukon	0	0	0	**0**	0.0%
Northwest Territories	0	0	0	**0**	0.0%
Nunavut	0	0	0	**0**	0.0%
Total Canada	**457**	**443**	**183**	**1,083**	**100.0%**

TABLE 2

Gross Domestic Product by province

	Direct	Indirect	Induced	Total	Percentage
Newfoundland and Labrador	0.0 $	0.3 $	0.2 $	**0.5 $**	0.5%
Prince Edward Island	24.6 $	20.9 $	12.1 $	**57.6 $**	60.1%
Nova Scotia	0.0 $	2.3 $	1.1 $	**3.4 $**	3.6%
New Brunswick	0.0 $	3.5 $	1.3 $	**4.7 $**	4.9%
Quebec	0.0 $	5.3 $	2.4 $	**7.7 $**	8.0%
Ontario	0.0 $	9.7 $	6.0 $	**15.8 $**	16.4%
Manitoba	0.0 $	0.9 $	0.3 $	**1.2 $**	1.3%
Saskatchewan	0.0 $	0.5 $	0.2 $	**0.7 $**	0.7%
Alberta	0.0 $	1.6 $	1.1 $	**2.7 $**	2.8%
British Columbia	0.0 $	0.9 $	0.7 $	**1.6 $**	1.7%
Yukon	0.0 $	0.0 $	0.0 $	**0.0 $**	0.0%
Northwest Territories	0.0 $	0.0 $	0.0 $	**0.0 $**	0.0%
Nunavut	0.0 $	0.0 $	0.0 $	**0.0 $**	0.0%
Total Canada	**24.6 $**	**45.8 $**	**25.4 $**	**95.8 $**	**100.0%**

TABLE 3

Fiscal and parafiscal revenues by province

	Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	Manitoba	Saskatchewan	Alberta	British Columbia	Yukon	NWT	Nunavut	Canada
Government of Canada														
Federal Income Tax	0.0 $	2.9 $	0.2 $	0.2 $	0.3 $	0.7 $	0.0 $	0.0 $	0.1 $	0.1 $	0.0 $	0.0 $	0.0 $	**4.5 $**
GST & other Indirect taxes	0.0 $	1.3 $	0.0 $	0.1 $	0.2 $	0.5 $	0.0 $	0.0 $	0.1 $	0.0 $	0.0 $	0.0 $	0.0 $	**2.2 $**
Federal Tax on Corporate Income	0.0 $	1.3 $	0.1 $	0.1 $	0.2 $	0.7 $	0.0 $	0.0 $	0.1 $	0.1 $	0.0 $	0.0 $	0.0 $	**2.8 $**
Total gouvernment of Canada	**0.0 $**	**5.5 $**	**0.3 $**	**0.4 $**	**0.7 $**	**1.9 $**	**0.1 $**	**0.1 $**	**0.3 $**	**0.2 $**	**0.0 $**	**0.0 $**	**0.0 $**	**9.5 $**
Provincial governments														
Provincial Income Tax	0.0 $	2.8 $	0.1 $	0.1 $	0.3 $	0.4 $	0.0 $	0.0 $	0.1 $	0.0 $	0.0 $	0.0 $	0.0 $	**3.9 $**
Sales tax & other Indirect taxes	0.0 $	2.4 $	0.0 $	0.3 $	0.1 $	0.6 $	0.1 $	0.0 $	0.0 $	0.1 $	0.0 $	0.0 $	0.0 $	**3.6 $**
Provincial Tax on Corporate Income	0.0 $	0.7 $	0.1 $	0.1 $	0.2 $	0.4 $	0.0 $	0.0 $	0.1 $	0.0 $	0.0 $	0.0 $	0.0 $	**1.7 $**
Total gouvernements provinciaux	**0.0 $**	**5.9 $**	**0.3 $**	**0.5 $**	**0.6 $**	**1.4 $**	**0.1 $**	**0.1 $**	**0.1 $**	**0.1 $**	**0.0 $**	**0.0 $**	**0.0 $**	**9.2 $**
Municipalities	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	**0.0 $**
Parafiscality														
Government of Canada	0.0 $	1.2 $	0.0 $	0.0 $	0.1 $	0.2 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	**1.6 $**
Provincial governments	0.0 $	0.0 $	0.0 $	0.0 $	0.6 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	**0.6 $**
Total	**0.0 $**	**1.2 $**	**0.0 $**	**0.0 $**	**0.6 $**	**0.2 $**	**0.0 $**	**0.0 $**	**0.0 $**	**0.0 $**	**0.0 $**	**0.0 $**	**0.0 $**	**2.2 $**
Total with parafiscality														
Government of Canada	0.0 $	6.7 $	0.4 $	0.5 $	0.8 $	2.1 $	0.1 $	0.1 $	0.4 $	0.2 $	0.0 $	0.0 $	0.0 $	11.1 $
Provincial governments	0.0 $	5.9 $	0.3 $	0.5 $	1.1 $	1.4 $	0.1 $	0.1 $	0.1 $	0.1 $	0.0 $	0.0 $	0.0 $	9.7 $
Municipalities	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $	0.0 $
Total	**0.1 $**	**12.6 $**	**0.6 $**	**1.0 $**	**1.9 $**	**3.5 $**	**0.3 $**	**0.1 $**	**0.5 $**	**0.3 $**	**0.0 $**	**0.0 $**	**0.0 $**	**20.9 $**

Federal parafiscality: EI Premium

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