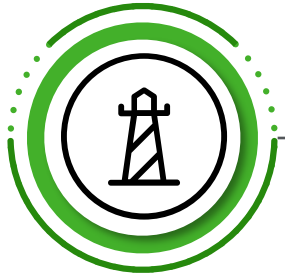


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Executive Summary

Executive Summary

The State of Readiness Report examines the capacity of Nova Scotia's tourism industry to implement accessibility measures and meet the provincial government's upcoming built-environment accessibility standards. The report also considers potential operator supports.

Most operators agree that tourism businesses need to be accessible
– survey of 420 tourism operators

While all tourism operators can work toward removing accessibility barriers, upcoming provincial accessibility standards will soon be implemented. The Tourism Industry Association of Nova Scotia (TIANS) and Tourism Nova Scotia wanted to understand the industry's current levels of accessibility and assess the industry's overall readiness to implement new accessibility measures.

Consultations and survey responses

Deloitte Economic Advisory was engaged to consult with industry associations and conduct a statistically valid survey of Nova Scotia's tourism operators.

Using the *Interim Accessibility Guidelines for Indoor and Outdoor Spaces* as a guide, the survey asked tourism operators to rate their level of accessibility in their built environment.

Most operators agree that tourism businesses in Nova Scotia need to be accessible, according to the survey results. Most operators are somewhat familiar with accessibility requirements.

However, only about half of tourism operators report meeting all of the applicable interim accessibility guidelines, ranging from 47 to 54 percent. There are still a significant number of visitor experiences that may be falling short in meeting the requirements needed to create an inclusive environment for individuals with disabilities.

Paths, washrooms, entrances, and parking had higher reported accessibility rates, but few operators reported having power door openers or seating along trails.

Tourism operators are split on whether technical requirements would be easy to implement. Almost two-thirds disagreed that costs to upgrade their locations would be reasonable.

While almost one quarter of operators plan to renovate or expand within the year, most said the accessibility guidelines may impact whether they proceed.

Regional or sectoral differences

No region reported a significantly higher or lower overall rate of accessibility.

EXECUTIVE SUMMARY

Many tourism sector organizations recognize that making experiences more accessible will increase visitation – plus it’s the “right thing to do.”

Slight differences between tourism sectors are evident in the reported level of overall accessibility. The highest overall rates of reported accessibility were in the sectors of tour/experience providers, travel/transportation, and food and beverage, while accommodations had the lowest overall reported levels of accessibility.

Tourism sector organizations were supportive of improving accessibility in the built environment for the tourism industry. Many recognized it would not only increase visitation but is also the “right thing to do.”

Sector organizations felt tourism operators lack a clear understanding of the guidelines or available funding supports. Although they don’t currently have the capacity, sector organizations would take a leadership role in guiding their members and promoting grant programs if provided with sufficient training and resources.

Aspirations and challenges

Overall, the tourism industry is motivated to be welcoming to all visitors. Ideally, accessibility should be a priority for Nova Scotia’s tourism operators. However, small businesses and nonprofits may struggle to afford implementing accessibility measures, and those who do have the resources may face supply chain issues and/or a lack of available contractors.

All cost estimates large and small

The cost to make the tourism industry 100% accessible is daunting, with preliminary conservative estimates ranging from \$24 million to \$100 million and beyond.

Even if a small percentage of operators were to remove barriers in their built environment, the financial impact would be significant. That said, there are measures which can be implemented with very little cost or difficulty.

Case studies

The report accentuates the positive by outlining the successful implementation of accessibility measures by tourism operators. These excellent examples are showcased through seven case studies.

Implementation

The vision for Nova Scotia’s tourism industry is to normalize built environment accessibility as a standard practice. Organizations, governments and the tourism industry all have a role to play in improving accessibility in the built environment.



Overview

Introduction

The Tourism Industry of Nova Scotia is assessing the readiness of operators to meet the Government of Nova Scotia's proposed new accessibility standards for the built environment.

In 2017, Nova Scotia became Canada's third province to pass accessibility legislation, committing to a more equitable and accessible province. The Government of Nova Scotia is developing accessibility standards and resources to support the goal of achieving an accessible Nova Scotia by 2030.

Accessibility standards for public and private sector entities are being developed in six areas: goods and services, information and communication, transportation, employment, built environment, and education. The Accessibility Advisory Board has submitted recommendations for an accessibility standard in the built environment to the Minister of Justice for review.

These new accessibility standards will affect many tourism businesses and organizations across Nova Scotia. With support from government and industry partners, TIANS is undertaking a four-phase initiative to support the tourism industry in identifying and eliminating accessibility barriers so that travelers of all abilities can experience everything Nova Scotia's tourism industry has to offer.

Deloitte's Economic Advisory team was engaged by TIANS, in partnership with Tourism Nova Scotia (TNS), in August 2023 to examine the tourism industry's state of readiness to implement accessibility measures and meet Nova Scotia's upcoming built environment accessibility standards. The project included a review of trends in accessible tourism, a statistically valid survey of Nova Scotia's tourism operators and engagement with industry associations.

Results of this analysis are provided in this report along with case studies.

This report will inform the remaining two phases of the initiative: identifying gaps and opportunities to enhance the tourism industry's accessibility capacity and creating a tourism accessibility framework that will link tourism businesses with the resources and tools they need to increase their capacity to meet accessibility standards and provide travelers with the information they need.



Photo Credit: Province of Nova Scotia

OVERVIEW – RECOMMENDATIONS FROM ACCESSIBILITY DIRECTORATE

Accessibility standards are proposed as a combination of measures that include amendments to the Nova Scotia Building Code, regulations, and guidelines.

Nova Scotia Building Code

Several of the Accessibility Advisory Board’s recommendations are presented as amendments to the Nova Scotia Building Code. If these are enacted, they would apply only to new builds or expansions. Existing buildings will be encouraged but not required to make these changes.

Examples of recommended changes to the Building Code include:

- Requirements related to power doors at primary and accessible entrances.
- Specifications on the installation height for wall-mounted safety equipment.
- Rules for pathways leading from buildings to sidewalks, roadways, and parking lots.

Regulations

Many of the recommendations are presented as regulations, which will be enforceable laws if enacted. These are separate from the regulations in the Nova Scotia Building Code, and it isn’t clear whether the regulations will apply to all tourism operators or whether there will be exemptions for existing infrastructure.

Regulations that may be relevant to tourism operators include:

- Rules to ensure current standards are met in existing accessible washrooms.
- Requirements for benches or seating areas along paths of travel.
- Signage specifications for content, language, design elements, braille, and installation.
- Requirements for recreational facilities to provide areas for service animals to wait for owners.

Guidelines

Some recommendations are framed as guidelines. If enacted, these will be courses of action that are encouraged, but not required.

Examples of guidelines that may be relevant to tourism operators include:

- Including sensory-friendly spaces with adaptive lighting, quiet areas and privacy.
- Ensuring that primary building entrances are lit so entrances and paths are visible from a distance.
- Using contrasting colours in décor to enhance depth perception, reduce visual noise, and facilitate visual communication, orientation, and wayfinding.

Tourism Operator Accessibility Survey Findings

OVERVIEW - TOURISM OPERATOR ACCESSIBILITY SURVEY FINDINGS

The survey provided insights into the tourism sector's current accessibility and its readiness to meet the Government of Nova Scotia's proposed new accessibility standards.



The Tourism Industry Association of Nova Scotia (TIANS), in partnership with Tourism Nova Scotia (TNS), commissioned a survey to evaluate the tourism sector's current accessibility and its readiness to meet upcoming accessibility standards, and to identify areas that need improvement.

Survey questions were based on the Nova Scotia Accessibility Directorate's technical recommendations in *Interim Accessibility Guidelines for Indoor and Outdoor Spaces* (May 2023). The interim guidelines will eventually be replaced by a provincial accessibility standard for the built environment, which is now under development. Public consultation is currently underway.

The survey was conducted by Deloitte Economic Advisory's market research team from October 12 to December 1, 2023. It employed a mixed-mode methodology, randomly selecting tourism businesses to participate in either a phone or online survey. The survey was promoted through direct emails to operators registered with TIANS and TNS, sector associations, and regional tourism destination organizations.

The survey was completed by 420 operators, offering a statistically valid representation of the tourism industry in Nova Scotia. To confirm the validity of the self-reported data, an audit of 50 randomly selected sites compared reported information to the actual characteristics. The sites included a mix of sectors, regions, and business sizes with varying levels of reported accessibility.



Most operators agree that tourism businesses in Nova Scotia need to be accessible.

Accessibility is important to tourism operators

Most tourism operators recognize the importance of making built environments accessible, with 93% agreeing that tourism businesses in the province need to be accessible for people with disabilities.



Operators are somewhat familiar with requirements

Three-quarters of tourism operators in the province (75%) said they were at least somewhat familiar with what is required to make their business location accessible.



Much of the industry reports having accessibility barriers

Half of tourism operators (50%) believed they were fully compliant with interim accessibility guidelines at the time of the survey.

While half of the respondents reported meeting all of the applicable interim accessibility guidelines, there are still a significant number of businesses that may be falling short in meeting the requirements needed to create an inclusive environment for individuals with disabilities.



“We need to be better at making sure our public buildings are more accessible to all.” - Survey respondent



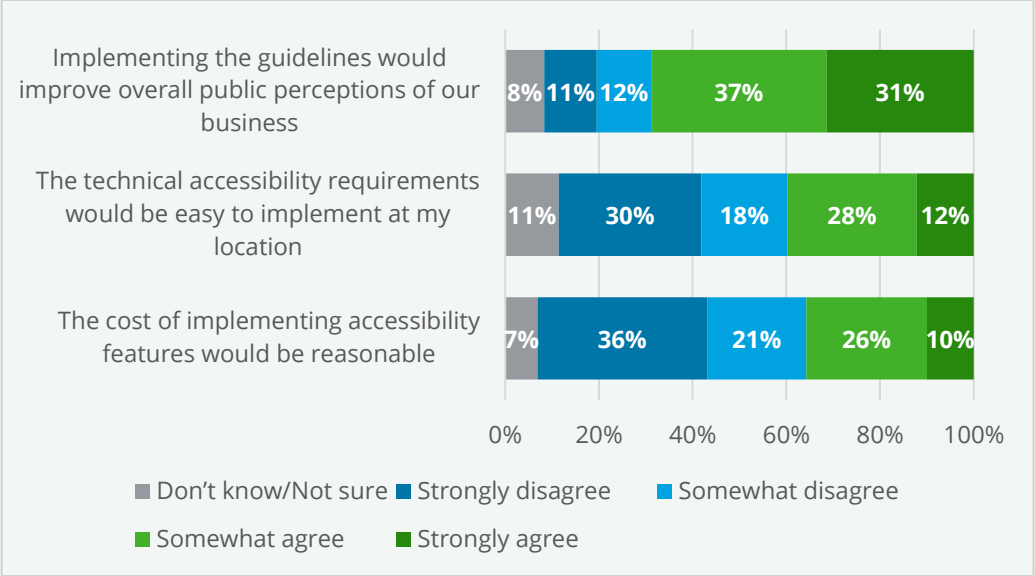
Tourism operators are split on whether technical requirements will be easy to implement. Almost two-thirds disagreed that costs would be reasonable.

Benefits and challenges

68% of operators agreed that implementing accessibility guidelines would improve the overall perceptions of their business.

However, only 36% of operators agreed that the costs would be reasonable, and only 40% agreed that the technical requirements would be easy to implement.

Fig. 1 – Tourism operator perceptions on the implementation of accessibility requirements



Paths, washrooms, entrances and parking had the highest reported rates of accessibility, while few operators reported having power door openers or seating along outdoor trails.

62% have fully accessible **interior paths** to reception desks, service counters and waiting areas.



55% have fully accessible **washroom** stalls for people with wheeled mobility devices.



46% have the minimum number of designated accessible **parking spaces**.



60% report a direct continuous exterior path **free of obstacles** connecting the building entrance to a pedestrian route, parking, and/or public transit.

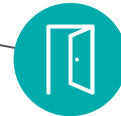


53% have a fully accessible **main entrance**.



28% of respondents with trails report having at least one trail with an accessible entrance and a firm, stable, **slip-resistant path** surface.

24% have a **powered door operator**.



22% use the **International Symbol of Access** to identify accessible access to washrooms, main entrances, and elevators.



21% of respondents with stairs report having a colour-contrasted horizontal strip marking the **edge of the treads**.



18% of respondents with **trails have seating** provided at regular intervals.





While almost one-quarter of operators plan to renovate or expand within the year, 85% said the accessibility guidelines may impact whether they proceed.

Impact on plans to renovate or expand

Once finalized, many of the requirements in the upcoming provincial accessibility standard will apply only to new builds, renovations and expansions.

While 21% of operators say they planned to renovate or expand their location over the next year, the majority (85%) agreed that the accessibility guidelines would have an impact on their decision to proceed with plans, whether positively or negatively.

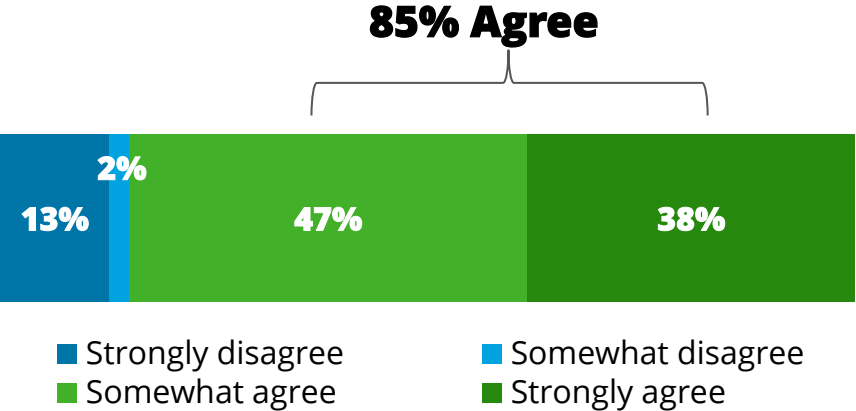
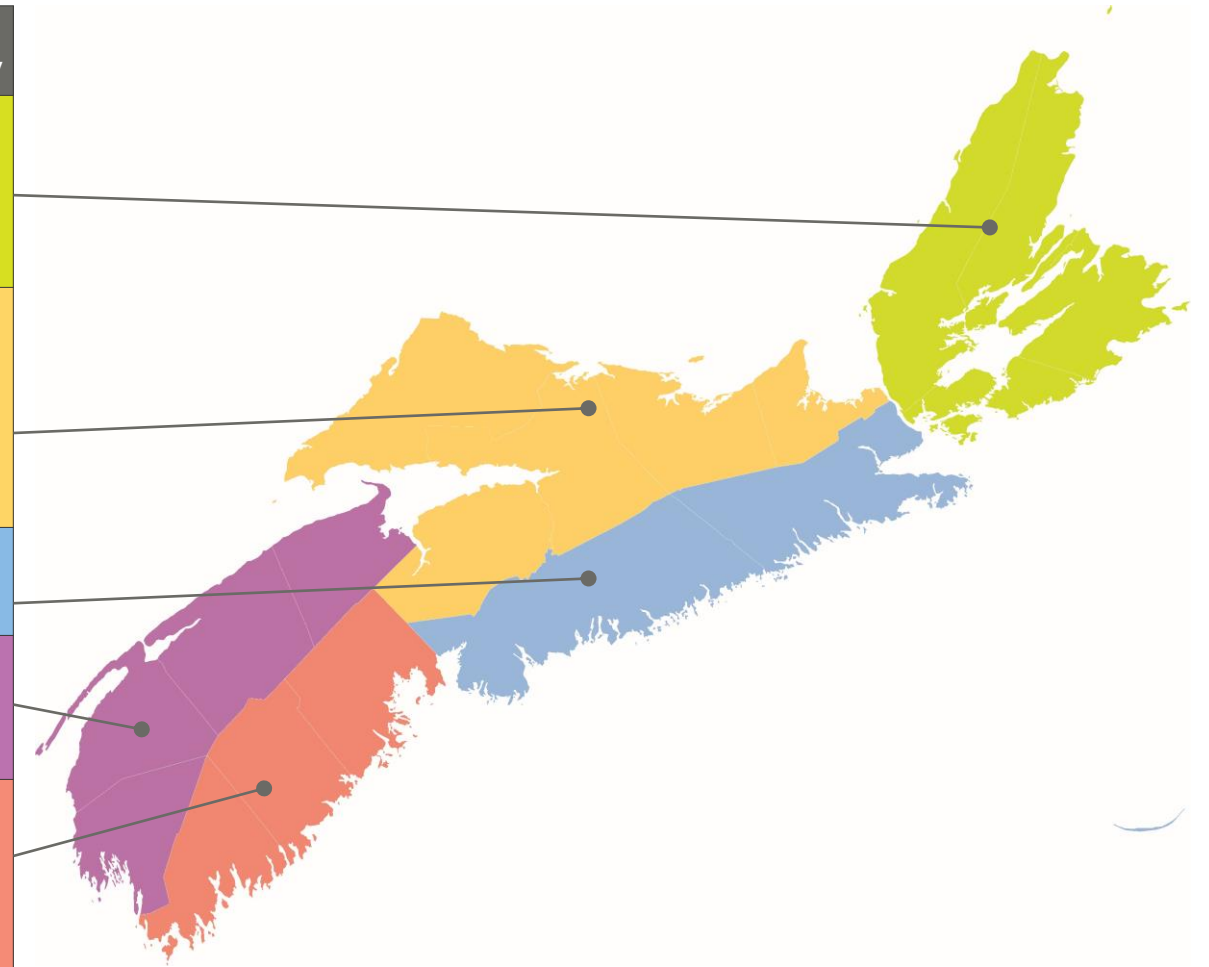


Fig. 2 - Tourism operator opinions on whether guidelines will influence decisions to proceed with planned renovations or expansion.

No region reported a significantly higher or lower overall rate of meeting applicable interim accessibility guidelines. The Tourism Operator Accessibility Survey results were also analyzed by region. The table and figure below indicate regional clusters of counties for reporting purposes.

Table 1 – Overall accessibility rating – survey results by region

Survey region	County	Responses*	Sample Size	Overall Accessibility
Cape Breton Region	Cape Breton	23	97	50%
	Inverness	35		
	Richmond	7		
	Victoria	37		
Central and Northeast Nova	Antigonish	11	80	49%
	Colchester	13		
	Cumberland	26		
	Hants	19		
	Pictou	12		
Eastern Shore/Halifax	Halifax	84	90	53%
	Guysborough	6		
Annapolis Valley/Yarmouth & Acadian Shores	Annapolis	21	75	53%
	Digby	21		
	Kings	33		
South Shore	Lunenburg	42	82	47%
	Queens	9		
	Shelburne	11		
	Yarmouth	20		



*Respondents were able to select multiple options for county, so totals may be greater than 420.

Reported accessibility averaged 49% in Nova Scotia counties.

Reported accessibility was relatively uniform across the province, with an average of 49%. Nova Scotia’s tourism operators have implemented some built environment accessibility measures, while also recognizing there is more needed to meet upcoming guidelines. Table 2 details accessibility rating by county, and the scatterplot in figure 4 demonstrates the narrow range of variation between counties.

The heat map in figure 5 visually depicts accessibility ratings by county, with darker areas representing greater rates of reported accessibility. The eight counties representing the highest reported rates averaged 55% and the lowest half of accessibility rates averaged 42%. This data also serves as a benchmark that can be used to measure improvement over time, as more operators implement built environment accessibility measures.

Table 2 - Average accessibility rating in Nova Scotia, by county

County	Accessibility
Annapolis	44%
Antigonish	44%
Cape Breton	55%
Colchester	33%
Cumberland	54%
Digby	47%
Guysborough	41%
Halifax	54%
Hants	54%
Inverness	47%
Kings	63%
Lunenburg	42%
Pictou	54%
Queens	52%
Richmond	32%
Shelburne	46%
Victoria	43%
Yarmouth	54%

Fig. 4 - Average reported accessibility in Nova Scotia, by county

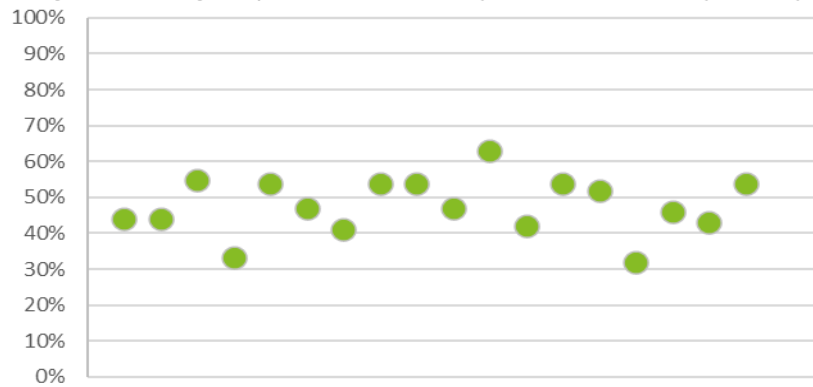
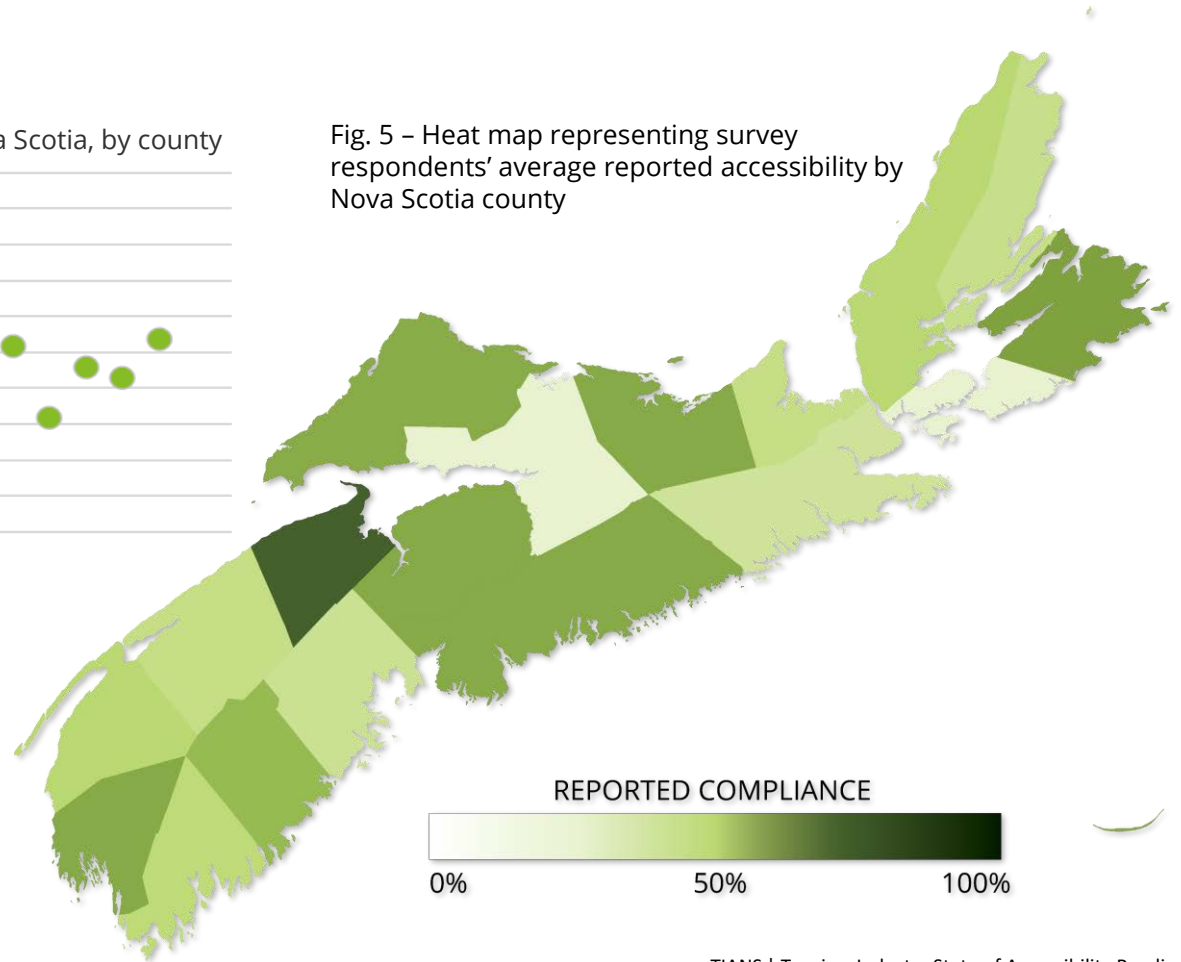


Fig. 5 - Heat map representing survey respondents' average reported accessibility by Nova Scotia county





Slight differences between tourism sectors were seen in reported overall accessibility.

Overall reported accessibility by sector

The highest overall rates of reported accessibility were in the “tour provider, experience, and travel/transportation” and the “food and beverage” sectors, at 54% and 53% respectively.

The “accommodations” sector had the lowest overall reported accessibility rate at 48%, which was 2% lower than the combined overall accessibility rate for all sectors of 50%.

Ease of implementation

Operators in the Food and beverage sector had a higher percentage of agreement that the technical requirements would be easy to implement at their business (63%) compared to all sectors (45%).

Food and beverage operators were most familiar with the requirements to make their business location accessible (86%) compared to familiarity in all sectors (75%).

Table 3 - Tourism operator overall reported accessibility, by sector

Tourism Sector	Sample Size	Average Overall Accessibility
Accommodations	196	48%
Adventure, recreation, and attractions	82	50%
Food and beverage	65	53%
Tour providers, experiences, and travel/transportation	62	54%

Awareness of grant programs

Almost half of respondents in the “adventure, recreation, and attractions sector” were at least somewhat familiar with the provincial ACCESS-Ability grant programs (49%) compared to just 33% overall awareness in all sectors.



Accommodation operators may be divided in their perceptions and beliefs about accessibility, but the majority agree that support would be valuable.

Just a few of all survey respondents (3% overall) disagreed with the statement that “tourism businesses need to be accessible for people with disabilities.”

However, those who did disagree with the statement were principally from the accommodations sector. Representing 41% of all respondents, operators from the accommodations sector accounted for 63% of respondents who disagreed.

Everyone in this group of accommodation businesses also strongly disagreed that costs for implementing accessibility measures would be reasonable. Comments from these respondents – largely operators of B&Bs, inns, and small motels – included concerns about the feasibility of renovating heritage buildings and the difficulty in understanding accessibility requirements.

Accommodation operators were less likely to agree that implementing the accessibility guidelines would increase visitation (49% vs. 56% of all operators) or that it would improve perceptions of the business (68% vs. 75% all operators).

Those who “strongly agreed” that Nova Scotia’s tourism businesses need to be accessible for people with disabilities were more likely to agree that implementing accessibility measures would both increase visitation (59%) and improve perceptions of their business (77%). This group of respondents included several branded and independent hotels, as well as eco-retreats and cabins, with some B&Bs and heritage properties.

While accommodation operators may be divided in their perceptions and beliefs about accessibility, the majority agree that supports would be valuable.

Of the 22% of accommodations operators who said they planned to renovate or expand over the next 12 months, most thought they would benefit from support provided by advisors and financial programs.

Such support could make all the difference to reluctant operators who misunderstand the scope of the regulations. For example, some believed that every space in their property will become subject to the regulations, and many don’t understand that the regulations apply mainly to new builds, expansions and renovations. Education and individual consultation may provide clarity.

Stakeholder Engagement

“Three quarters of the membership didn’t even know that this was being mandated by the government. People are looking for more clarity for what this means now and moving forward.”

– stakeholder interview

Sector organizations and regional business organizations are eager to help Nova Scotia’s tourism operators become more accessible.

Engagement included interviews and focus groups with sector associations, destination marketing organizations, and other stakeholders to gather a sense of the major issues involved in accessibility and potential supports to help operators implement built environment accessibility measures.

Overall, stakeholder organizations were supportive of improving accessibility in the built environment for the tourism industry. Many recognized that doing so would not only increase visitation but is also the “right thing to do.”

When asked to estimate how well their members were doing with providing accessible options to visitors, they gave moderate to fair grades, noting particular challenges for rural communities, heritage buildings and volunteer-run non-profit organizations.

Sector organizations also recognize that new accessibility requirements could put pressures on an industry that is already struggling financially.

Many were doubtful that investment in accessibility measures would result in increased revenue. Some also thought that enhancing accessibility may mean loss of future revenue, such as if restaurants remove tables to make room for wheelchair navigation, or when a hotel combines two rooms to create one accessible room.

Many sector organizations say that tourism operators lack a clear understanding of the guidelines or available funding supports. Although they don’t currently have the capacity, industry groups would take a leadership role in guiding their members and promoting grant programs if provided with sufficient training and resources.

Some sector organizations have taken a proactive role in supporting operators with adopting accessibility measures. The Restaurant Association of Nova Scotia hired a consultant to conduct research in early 2023 to assess the ability of restaurants to make washrooms accessible and estimate the costs involved.

Several stakeholder organizations noted that partnerships between tourism operators and the disability sector can be helpful, recognizing that it can be challenging to fully comprehend the needs of people with disabilities without their perspectives.

Some sector organizations pointed to the American Disability Act (ADA) regulations that have been in place since 1990 in the United States, noting that American hotels and campgrounds have surpassed Canadian partners in removing barriers.



Photo Credit: The Port Pub and Bistro, Port Williams, NS

STAKEHOLDER ENGAGEMENT

An assessment of strengths, opportunities, aspirations, risks, and results (SOARR) was prepared based on the input from stakeholder groups.

Strengths

- Tourism operators want to welcome all visitors.
- Sector associations can provide support to operators.
- Operators were clear they need help with education, assessments, and navigating resources.

Opportunities

- Information can be shared to raise awareness of funding programs.
- Resource guides can be developed for specific tourism sectors.
- Promoting accessible visitor experiences and sites can raise awareness among operators.

Aspirations

- Accessibility is a priority for Nova Scotia's tourism operators.
- Operators recognize the right of all people to participate fully in travel offerings.

Risks

- Small businesses and non-profits struggle with affordability of accessibility measures.
- Operators fear that enforcement of regulations may lead to closures.
- Supply chain issues and availability of contractors may impact completion of work before deadline.

Results

- Sector organizations will serve as active partners in promoting accessibility.
- Tourism operators will understand requirements to meet accessibility guidelines.
- Operators will be linked to financial resources to implement necessary measures.
- Visitation by people with disabilities will increase.

The following organizations were invited to share their insights and suggestions:

- Accessibility Directorate
- Association of Nova Scotia Museums
- Campground Owners Association of NS
- Construction Sector Council for NS
- Hotel Association of Nova Scotia
- Inns of Nova Scotia
- Nova Scotia Indigenous Tourism Enterprise Network
- Restaurant Association of Nova Scotia
- Wine Growers Nova Scotia
- Coastal Nova Scotia
- Destination Cape Breton Association
- Discover Halifax
- South Shore Tourism Cooperative
- Truro-Colchester Chamber of Commerce
- Valley Regional Enterprise Network
- Yarmouth and Acadian Shores Tourism Association
- Nova Scotia Heritage Trust

Areas for Improvement

OVERVIEW – AREAS FOR IMPROVEMENT

“There’s a need for more one-on-one conversations, access to people who can help walk operators through what they need”

– industry association interview

Nova Scotia’s tourism operators will have time to plan for meeting accessibility standards in the built environment but will need additional supports to understand what is required.

Tourism operators have some time to plan for including accessibility measures in new builds or expansions, with proposed regulations expected to take effect April 1, 2026. That isn’t to say that it will be easy. As many of the regulations fall outside of the Nova Scotia Building Code, operators may not be able to depend on the municipal permit process to ensure that their building plans include all required accessibility measures.

This potential gap calls for more support through education and guidance. Municipalities and industry associations can play an important role in supporting awareness efforts.

Although almost all of the regulations will apply only to new builds or expansions, operators should be aware that there are a few regulations that will apply to existing operations. One of these relates to the temporary sidewalks that are often installed to accommodate sidewalk cafés and restaurant patios. Normally, these sidewalks are built and installed in early summer and stored over winter months.

Beginning April 1, 2026, these temporary sidewalks will have to comply with regulations each time they are re-installed. Operators building new temporary sidewalks in 2024 and 2025 should build according to the proposed regulations to prevent costly re-builds when regulations take effect.

Similarly, starting in April 2026, businesses will be required to ensure that any street furniture, signage, banners, planters and waste receptacles allow a clear accessible path of travel, including ensuring that objects are cane detectable to the ground. This means that businesses will need to ensure that protruding objects like wall-mounted banners or hanging flower baskets have ground-level barriers to prevent people with blindness from accidentally bumping into them.

The upcoming legislation has prompted tourism operators to think about accessibility, perhaps for the first time. However, meeting minimum requirements shouldn’t be the goal for the tourism industry, where going “above and beyond” for guests begins with anticipating their needs.

A key area for improvement relates to shifting the beliefs and perceptions of operators who think that implementing accessibility measures is difficult and expensive, while many barriers can be removed at no cost and with little effort. Normalizing accessibility in Nova Scotia’s tourism sector will require a comprehensive approach championed by industry associations, destination marketing organizations and government partners, including municipal building inspectors and bylaw enforcement officers.



Gaps and Opportunities

Gaps

When assessing the readiness of Nova Scotia’s tourism sector to implement the accessibility measures, the biggest gap relates to financial resources.

Low-cost improvements

Many tourism operators, especially not-for-profit organizations and small businesses, fear that costs to implement accessibility measures are prohibitive. However, many accessibility measures can be implemented with very little cost or difficulty. These include:

- International symbol of access signage
- Horizontal strips to mark stair edges
- Handrails on both sides of existing stairs and ramps
- Adding designated parking spaces
- Changing bathroom doors so they can be locked with a closed fist
- Lowering a section of reception or service counters

Access to funding

Although 81% of operators said they would be more likely to implement accessibility measures if funding were available, familiarity with government grant programs was low.

Only a third (33%) of operators were familiar with Nova Scotia’s ACCESS-Ability programs, which provide grants to small businesses, municipalities, Mi’kmaw Councils, schools, and registered non-profit organizations. These programs should be widely promoted through existing operator networks. Sharing “before and after” case studies with Nova Scotia’s tourism operators might inspire more to apply.

Supply issues

With many operators potentially working to reduce barriers over the next few years at the same time, supply chain shortages (building materials, equipment, fittings, etc.) and limited availability of contractors may drive up costs and limit implementation.

Some operators have already found it difficult to source accessible hardware and equipment and have relied on cooperative retailers and contractors to track down suppliers. This can be especially challenging in rural areas, where product offerings are limited due to lower demand.

Providing tourism operators with supplier lists or online catalogs, or forming preferred supplier partnerships with retailers are ways that industry organizations could support operators.

“There is no financially sound way to make our restaurant accessible – we would need to close.”

- Survey respondent



Even if a small percentage of operators were to remove barriers in their built environment, the financial impact would be significant.

Many of Nova Scotia’s tourism operators report having barriers to accessibility in their built environment. If just 10% of those operators were to invest in accessibility measures, the overall cost could be significant. The following table provides a preliminary look at potential costs related to a few common accessibility improvements but is by no means a comprehensive list of all possible accessibility upgrades and costs. Additional cost estimating will be required to further examine gaps and opportunities and create a tourism accessibility framework. Estimates are also subject to change due to supply chain challenges and inflation.

Table 4 – Potential accessibility renovation costs, based on the estimated number of operators with accessibility barriers, with 10% of those operators implementing accessibility upgrades. Estimated costs are based on a review of recent ACCESS-Ability program grant application budgets.

Feature	Estimated cost per item	10% of operators with accessibility barriers	Implementation cost: 10% of operators	Implementation cost for all operators
Parking space grading, repaving, striping, signage	\$3,000+	95	\$285,000+	\$2,850,000+
Washroom renovations, fixtures, signage	\$2,500 - \$50,000+	110	\$275,000 - \$5,500,000+	\$2,750,000 - \$55,000,000+
Accessible entrances (ramp, wide door)	\$8,000 - \$30,000+	100	\$800,000 - \$3,000,000+	\$8,000,000 - \$30,000,000+
Exterior doors with power openers	\$10,000+	40	\$400,000+	\$4,000,000+
Trail improvements and seating	\$45,000+	15	\$675,000	\$6,750,000

Many tourism operators are frustrated by technical aspects of implementing accessibility in existing spaces with limited room.

Simplify guidelines

Comprehensive guidelines may be confusing for operators looking for guidance specific to their type of operation. Sector-specific resources may be helpful to guide planning and implementation. For example, campgrounds may have different considerations than restaurants.

Provide specialized resources

Implementing accessibility renovations can be particularly challenging in communities with a concentration of historic buildings, small property footprints, and narrow streets. These challenges may include limited space for ramps and lifts and narrow doorways that are not easily widened. Operators situated in heritage buildings would benefit from specialized training and resources offered by organizations such as Heritage Trust of Nova Scotia.

Volunteer-run non-profit organizations such as community museums have limited financial resources. The Province's Community ACCESS-Ability program has an annual budget of \$1,000,000 but grant requests regularly exceed available funding by more than double that amount.

Clarify expectations

Feedback from operators suggests that many believe that all of accessibility recommendations will be legislated for all existing built environments. While all tourism operators are encouraged to remove accessibility barriers, the Accessibility Advisory Board's recommended accessibility standards will include a combination of amendments to the Nova Scotia Building Code, new accessibility regulations, and guidelines. While it is too soon to say what changes might be made to Nova Scotia's Accessibility Act, current legislation only applies to new builds and expansions.

Operators of bed-and-breakfast lodging and short-term rentals need clarification on whether accessibility requirements apply to businesses located in private residences.

Many operators assume that implementation of accessibility guidelines requires all areas in their operation to be fully accessible. This all-or-nothing perception was especially common for inn operators and B&B owners, who would benefit from clarification that making one room on the main floor accessible may be sufficient.

Overall, operators would benefit from learning that improvements to accessibility in existing spaces can be implemented over time, and that even small adjustments are worth making.

Operators need clarification around which guidelines may be required for all buildings and which would only apply to new builds.

Perceptions and beliefs play a crucial role in the removal of accessibility barriers. If tourism operators can't see the benefits of accessible measures, they are less likely to invest in improvements. Communication with operators will be essential to increasing accessibility in Nova Scotia's tourism sector.

Raise awareness

Operators may be unaware of the existence of accessibility legislation and may not have a clear understanding of the minimum requirements outlined in current guidelines.

Due to this lack of awareness, there is often a reluctance to prioritize accessible hotel rooms, especially among the general population.

Addressing this issue involves an effort to increase awareness of accessibility funding programs which are available for businesses and community organizations.

This can be achieved through targeted outreach and communication efforts. Additionally, promoting accessible visitor experiences and sites can help raise awareness among other operators, showcasing the benefits and importance of creating inclusive and accessible spaces.

Challenge assumptions

Operators must consider a wide range of accessibility aspects, including visual, hearing, cognitive disabilities, and other requirements, beyond just wheelchair accessibility. However, operators may struggle to understand these specific needs due to limited personal experience with disabilities. To address this, it is crucial to create opportunities for operators to directly engage with the disability community, gaining firsthand insights into accessibility considerations.

Operators should not assume that guests with accessibility challenges will always have caregivers to assist them. It is essential to recognize that individuals with disabilities may choose to travel independently or may not have caregivers available. Therefore, it is crucial to have comprehensive accessibility measures in place to cater to the diverse needs of guests with disabilities.

To foster a culture of accessibility, operators should prioritize it on par with safety. By considering accessibility as an integral part of operations, operators can guarantee its consistent integration and implementation across all services, facilities, and employees.

Energize outreach

A significant number of respondents (about 80%) said they were not familiar with the Accessibility Directorate of Nova Scotia. This highlights the importance of sector-led initiatives to address accessibility issues.

Challenges

CHALLENGES IN BUILT ENVIRONMENT ACCESSIBILITY

The key findings reveal that certain types of tourism operators may face challenges in meeting the new standards due to factors such as the location, type, or design of their tourism product.

Building characteristics

Some operators were concerned about the implications of making accessibility renovations in heritage buildings. In the case of community museums, the buildings themselves may be catalogued as historic artifacts. Custodians may worry that making accessibility modifications could contradict preservation principles.

In almost every case, restrictions for registered heritage properties relate only to exterior features. Property owners who are hesitant to make changes to their heritage properties due to concerns about preserving historical integrity and character can be reassured that widening doorways and adding ramps can usually be done while maintaining character-defining elements.

While architectural features (such as wrought iron railings on ramps) can help blend accessibility features into heritage building exteriors, these can lead to additional construction expenses. Registered heritage building owners can leverage additional funding opportunities through municipal governments and organizations such as the Heritage Trust of Nova Scotia. By stacking funding programs, the cost of implementing accessibility measures can be offset.

Financial barriers

The province's Small Business ACCESS-Ability program helps for-profit entities improve accessibility by funding two-thirds of eligible expenses to a maximum of \$50,000 per project. Applicants can receive up to \$100,000 a year. However, awareness of this program is low in the tourism sector. Since for-profit businesses are often ineligible for grants, they may not be as likely to look for government funding. This might explain why the program's \$1-million budget isn't often fully spent until its second intake.

Financial considerations may also lead to lost revenue for businesses. Restaurants may lose seating options to accommodate wider paths of movement. Similarly, hotels may need to combine two rooms to create one accessible room, which could result in a decrease in the number of available rooms and potential revenue. On the other hand, in a historic inn or B&B, converting an under-utilized main floor sitting room to an accessible room with an accessible ensuite bathroom may increase revenue potential.



Photo Credit: Freedom Depth Canada

CHALLENGES IN BUILT ENVIRONMENT ACCESSIBILITY

The key findings reveal that certain types of tourism operators may face challenges in meeting the new standards due to factors such as the location, type, or design of their tourism product.

Product offering

When it comes to outdoor experiences like visiting beaches, kayaking, fishing, paddling, hiking and climbing, it is important to acknowledge that many of the locations for these activities may not be suitable for individuals with disabilities or those with limited physical fitness.

Alternative experiences may be developed for people with disabilities. Freedom at Depth Canada, for example, is a Canadian scuba diving training organization for people with disabilities including paraplegics, quadriplegics, blind, persons with muscular dystrophy, cerebral palsy, multiple sclerosis, spina bifida and traumatic brain injury.

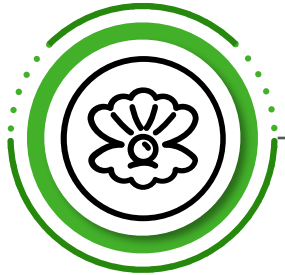
More than two-thirds of tourism operators with trails reported that they did not have any that were accessible. Nova Scotia's Accessible Trail Expansion Fund assists trail groups, municipalities and other not-for-profit organizations with funding for capital and operating costs for accessibility improvements. However, the program is not available to for-profit businesses.

Location

Many of Nova Scotia's most popular destinations are in historic cities, towns and villages. The narrow and steep sidewalks and small lot footprints that form part of the charm of colonial settlements and historic sites like Old Town Lunenburg and Halifax present accessibility challenges that are not easily resolved.

While upcoming accessibility standards relate mainly to new builds and expansions, many operators recognize that lack of accessibility can mean loss of potential visitors. Although they might be motivated to improve accessibility in their existing spaces, limited room for ramps or lifts on the exterior of buildings can present barriers to implementation.

Other issues with location relate to routes from parking and transit stops that are beyond the control of operators. Rural villages may lack accessible routes beside roadways, while municipal sidewalks can lack proper grading and curb ramps at entrances to downtown shops, restaurants and attractions.



Success Stories

Success Stories

The successful implementation of accessibility measures by tourism operators is showcased through seven case studies.

Seven businesses were selected for deeper study based on high reported accessibility and representing a diverse range of properties. Deloitte engaged directly with these tourism operators to prepare case studies that describe how each implemented accessibility measures, their motivations for doing so, and lessons learned along the way.

Table 5 – Tourism operator success stories

Business	Category	County
Barra Shores	Accommodations	Pictou County
Ship's Company Theatre	Attraction	Cumberland County
Salty Dog Sea Tours	Tour Operator	Lunenburg County
Heart to Hand Studio	Fine Arts	Lunenburg County
Mersey River Chalets	Accommodations	Queens County
Upper Clements Cottages & RV Park	Campground	Annapolis County
The August House	Accommodations	Hants County



Barra Shores offers wheelchair-accessible accommodations, beaches and trails.

A seaside escape for everybody

Why it was important

Ian and Tiffany MacNeil wanted their children to have the same opportunities as others, but when their youngest was born with a rare genetic disorder that required him to use a wheelchair, they soon realized that travel options were limited.

They had faced their own challenges with travel. On one trip to PEI, they had to carry their son up the stairs to get into the cottage, and there wasn't enough room for his wheelchair. So, they decided to build a fully accessible cottage to rent to other families and to community organizations.

When the MacNeil's found an 11-acre oceanfront property in Pictou County with a beach that is naturally accessible, they knew they had found the right location.

How they did it

With a \$100,000 tourism development grant from the Atlantic Canada Opportunities Agency (ACOA) and additional funding from the province's Small Business ACCESS-Ability program, they worked with an architect and contractor to design and build an accessible rental cottage.

Features include a concrete patio and fire pit area, a lift for hot tub entry, a powered entry door, accessible washroom with roll-in shower, and an accessible kitchen with lowered counter heights and microwave.

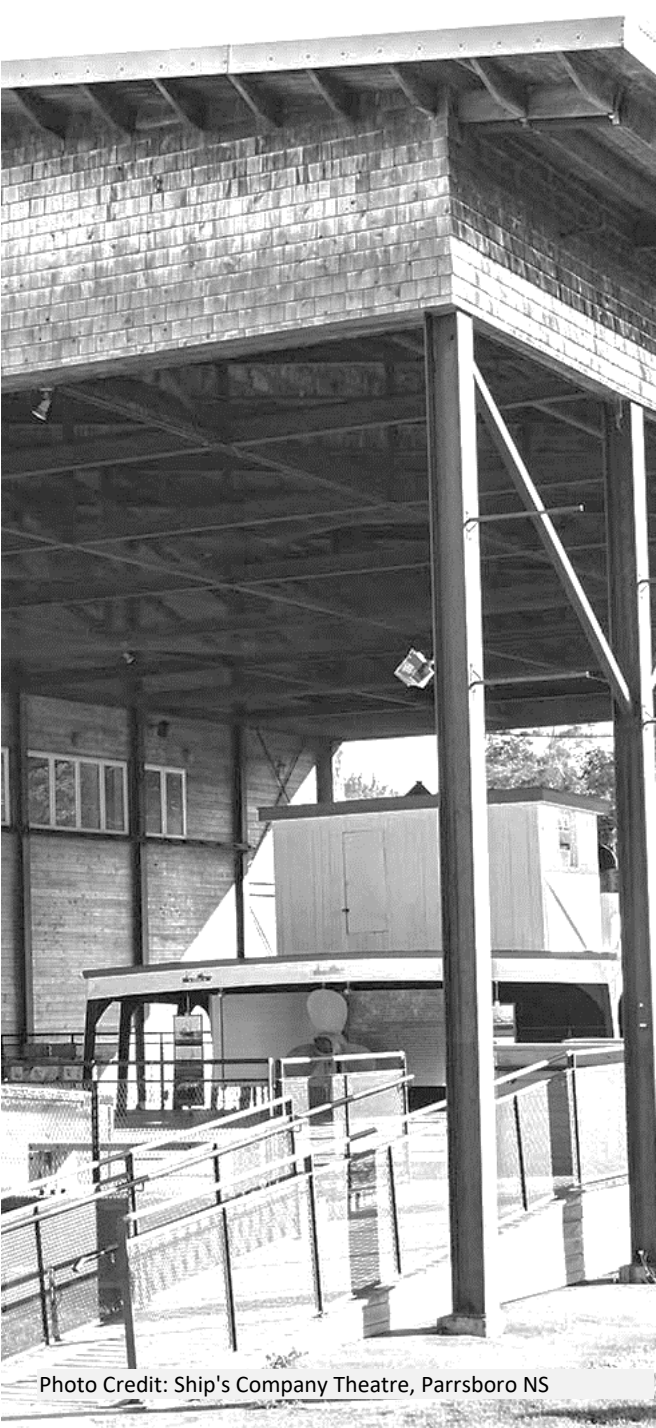
The property also includes accessible trails that were built by widening existing ATV trails and adding compacted gravel. Future goals include adding an all-terrain beach chair and adaptable canoe equipment.

Lessons learned

While some accessibility measures, such as powered entry doors, are very expensive to implement, others – such as waist-high electrical outlets and interior pocket doors – require minimal or no additional expense when incorporated in a new build.

The MacNeil family became aware of the need for accessible travel options through their own lived experiences and recognize that many tourism operators might not recognize that there is a market demand for accessible accommodations.

In true “build it and they will come” fashion, the cottage has already been rented by several families and groups requiring accessibility features.



Ship's Company Theatre wants everyone to enjoy professional theatre and concerts.

Setting the stage for accessible theatre

Why it was important

Although the town of Parrsboro has a year-round population of just 1,300 people, summer residents and visitors form a large audience for the main stage productions, concerts and community programs at Ship's Company Theatre.

The theatre was built 20 years ago around the "Kipawo," a former passenger and freight ferry, with ramps and barrier-free washrooms included in the original design.

Ship's Company has a community of members and funders who care deeply about accessibility, with a board and staff who are motivated to raise the quality of life for everyone. The current strategic plan includes commitments to improving accessibility in performances as well as in the facility.

How they did it

While the theatre would like to install an elevator, they have been able to implement measures such as assistive listening devices and American Sign Language (ASL) interpretation of main stage productions.

With support from an architectural firm that has experience with technical theatre projects, Ship's Company hired an accessibility consultant to help them learn how to better meet the needs of people with disabilities.

As a non-profit organization, the ability to make capital investments for accessibility upgrades depends on access to funding. The theatre noted that funding streams are often highly competitive and require strong project proposals to succeed.

Lessons learned

While Ship's Company is motivated to tap into the network of people with disabilities, they have learned that accessibility advocates are overburdened and in demand.

Based on their experiences, the theatre believes that planning, sourcing and implementing accessibility measures could be made much easier for non-profit cultural organizations.

They would like to see a platform that would serve as a one-stop shop for resources, information, current building codes (in easy-to-read formats) and contact information for accessibility consultants who could provide advice.



Salty Dog Sea Tours provides accessible narrated tours around Oak Island.

All aboard for accessible sea cruises

Why it was important

Commercial tour boats often have steep gangways, narrow boarding openings, and uneven or slippery deck surfaces, creating barriers for people who use mobility aids like wheelchairs and walkers.

When former paramedic Tony Sampson decided to start a boat tour company near Mahone Bay, he wanted to ensure that everyone could get a close-up view of the beautiful and mysterious Oak Island, home to the world's longest treasure hunt.

How they did it

The tour captain hired a custom boat manufacturer to build a vessel that was comfortable, stable, and wheelchair accessible. Known as a "tritoon," the triple-hulled pontoon boat is level to the dock, making it easy for people using mobility devices to board.

The boat was built with an entrance wide enough to accommodate wheelchairs and smaller powered chairs, with custom upholstery to accommodate wheelchair navigation.

While a standard boat would have cost about \$76,000, the customizations raised the cost to \$100,000.

Lessons learned

Five years into the business, the company is beginning to see repeat business from guests with disabilities. Sampson says it feels heartwarming to see peoples' smiling faces when they experience the completely accessible 60-minute adventure.





Heart to Hand Studio welcomes gallery visitors of all abilities with thoughtful design.

The art of creating an accessible gallery

Why it was important

When David Schut and Monica O'Halloran-Schut decided to build a new art studio and gallery in the small fishing village of LaHave, they drew from experience when designing the new building that would be home to Heart to Hand Studio.

Years earlier, Monica had a flower shop, and one of her regular customers used a wheelchair. Remembering how she had carefully arranged large shipments of poinsettias around the floor with enough room for the wheelchair to navigate, the couple wanted to make sure that people could enter and move through their new gallery with ease.

How they did it

As a new build, many of the Nova Scotia Building Code regulations were already geared toward accessibility with respect to the washroom, barrier-free paths of travel, and doorways. While David designed the space, he received guidance from the contractor and building inspector.

The large parking area is surfaced with non-slip paver stones and the front door can accommodate wide wheelchairs. Displays within the store are arranged to allow for ease of movement and thoughtful features such as an armless upholstered chair and lowered front counter height make it easier for people of all abilities to enjoy shopping in the space.

Lessons learned

The Schuts noted that, while their building and parking area is accessible, the lack of sidewalks along the road poses a real threat to people with limited mobility, sight, or hearing. Having observed many near misses as people attempt to walk along the narrow shoulder of the busy, curved road, they would like to see the addition of wide cantilevered boardwalks connecting the shops and galleries in LaHave.

Suggestions to help visitors with travel planning included adding an "accessible" tag to listings on the province's tourism website and providing operators with attractive "we are accessible" signage or stickers for front doors or windows.



Mersey River Chalets and Nature Retreat is a barrier-free woodland getaway.

A nature retreat for all to experience

Why it was important

When Mersey River Chalets and Nature Retreat was built amidst a 375-acre forest during the mid-1990s, accessibility was at the forefront of its design.

Two of the developers used wheelchairs, and they envisioned a place where physical barriers are minimized so that everyone can experience the serenity and beauty of nature regardless of their physical abilities.

The property features seven accessible chalets and a woodland boardwalk that follows the length of the river.

How they did it

Accessibility is built into every step of the visitor's experience, with clear signage that is easy for people with low vision to read, and an accessible office for checking in.

The chalets are completely wheelchair accessible, with ramps, wide doorways, roll-in shower units, moveable beds that can be pushed against a wall, and accessible kitchenettes. A hydraulic lifter is also available for guest use.

A two-kilometre-long accessible boardwalk along the river connects to accessible woodland pathways and lookout points over the river's rapids. Resting spots with seating are strategically placed along the way.

Lessons learned

Accessibility features benefit everybody. While designed for people with physical limitations, the boardwalk is also convenient for families with strollers and wagons.

Although some might think that adding accessibility features might be a challenge in natural areas, or might detract from a rustic setting, the opposite is true here. The boardwalk blends in seamlessly with the forest as it winds along the riverbank, enhancing the visitor experience. Likewise, a classic Canadian ambiance is achieved in the chalets with covered porches, pine interiors and wood-burning stoves. At first glance, many might not even recognize that accessibility has been built in.

The August House provides a welcoming space, where possible, for all.

Luxury amenities in a heritage building

Why it was important

Colette, Laura, and Ezra, co-founders of The August House, set out to bring together their passion for life's goodness and hospitality by creating a space that has a strong sense of comfort. They also wanted to keep in mind that this sense of comfort should be available and accessible to all.

The August House is a remarkable example of a renovated building from the 1850s. With its rich history and charming design, this building has been transformed into a modern accommodation facility. The renovation project has resulted in 11 newly renovated rooms, each offering a unique and comfortable experience for guests.

How they did it

The August House has one fully accessible room that is equipped with an accessible wheel-in washroom, handrails for added support, lowered racks and shelving for easy reach, and other accessibility features. Moreover, the room also includes an accessible kitchenette, allowing guests with mobility challenges to enjoy the convenience and independence of preparing their own meals.

The main floor of the building is also fully accessible. From the moment guests arrive, they are greeted with an accessible entrance that removes any barriers to entry. Inside, the hallways are designed to accommodate wheelchair users, with space for maneuverability.

Lessons learned

The August House serves as a shining example of how to successfully renovate an older building while prioritizing accessibility. By transforming an 1850s captain-style house into a modern accommodation facility, the owners preserved its historical charm while ensuring it meets the needs of all guests.

The August House conducted these renovations without grant funding and recognized the importance of clear information and adequate funding to assist other businesses in their journey toward accessibility and inclusivity.





Upper Clements Cottages & RV Park makes accessibility a priority for campers.

Cottage camping within everyone's reach

Why it was important

Martin-Henri and Nathalie Villeneuve's mission is to provide guests at Upper Clements Cottages & RV Park a serene and peaceful environment where everyone is shown respect.

The Annapolis Valley property features an accessible cottage with grade-level entry, wide doorways, accessible bathroom and kitchen, and spaces with a large turning radius.

Thinking about the customer's journey at each stage means they consider the little details, like a front desk that lowers at the touch of a button and making sure rabbit holes are filled in to enable guests in motorized wheelchairs to easily navigate across the lawns.

How they did it

As a former registered nurse, Nathalie was already familiar with assistive devices, but the couple soon learned that it could be hard to get information about accessibility standards and equipment suppliers. Staff at the local hardware store were very helpful with sourcing accessibility fixtures and equipment from suppliers, but some equipment is difficult to find, such as lever-type outdoor water faucets.

In cases where the built environment can't be easily modified, the Villeneuves modify service delivery. The doorway to the campground office isn't wide enough to accommodate larger wheelchairs, so they welcome guests outside under a covered area with a tablet and wireless payment processing machine.

Lessons learned

Accessibility is a continuous process for the Villeneuves, who are always thinking about ways to make it easier for people to fully enjoy the property. Future plans include adding a lift chair to the swimming pool.

Because disabilities come in many forms, they suggest adding more search filters to novascotia.com so visitors can search by specific needs.

They would like to see sector-specific supports like the guides and learning resources offered by the [American Camp Association](#).

Above all, an online catalog of fixtures and equipment that are accessible (while being easily cleaned and sanitized) would enable them to continuously improve accessibility for their guests.



Implementation



Photo Credit: Province of Nova Scotia

IMPLEMENTATION – VISION & PRIORITY AREAS

Vision: Normalize accessibility as a standard practice in the tourism sector.

The vision for Nova Scotia’s tourism industry is to normalize built-environment accessibility as a standard practice.

Top priority challenges

Using Deloitte’s proprietary derived importance methodology, survey analysis revealed that top priority should be given to supporting tourism operators in these three areas:

- Ease of implementation
- Costs associated
- Availability of information to understand what is required from the guidelines

Table 6 – Priority factors related to accessibility

Statement	Agreement	Importance	Priority Rank
The technical accessibility requirements would be easy to implement at my location	45%	9.4	1
The cost of implementing accessibility features would be reasonable	38%	8.4	2
There is enough information available to help me understand the accessibility guidelines	68%	6.3	3

“Guidance to understand what we need to add or change, financial support to get there and a reasonable amount of time to complete it.” - Survey respondent

IMPLEMENTATION PARTNERS

There are many potential partners in Nova Scotia to share the work of implementing accessibility.

Organizations and associations, government offices, committees, businesses, and community groups will all play a role in implementation. It will be helpful for one organization to act as lead champion for accessibility implementation in the tourism industry.

Organizations

Accessibility organizations

- Associations of architects, building officials and bylaw officers
- Atlantic Canada Opportunities Agency (ACOA)
- Chambers of commerce and business associations
- Colleges and Universities
- Community business development corporations
- Construction Association of Nova Scotia
- Destination marketing organizations
- Foundations supporting disability initiatives
- Heritage Trust of Nova Scotia
- Nova Scotia Federation of Municipalities
- Recreation associations
- Tourism Industry Association of Nova Scotia
- Tourism sector organizations

Government

- Government of Canada
- Municipalities and their accessibility committees
- Nova Scotia Built Environment Standard Development Committee
- Nova Scotia Accessibility Advisory Board
- Nova Scotia Accessibility Directorate
- Nova Scotia Building Advisory Committee (NSBAC)
- Nova Scotia Department of Communities, Culture, Tourism and Heritage
- Nova Scotia Registry of Joint Stock Companies
- Nova Scotia Office of the Fire Marshall

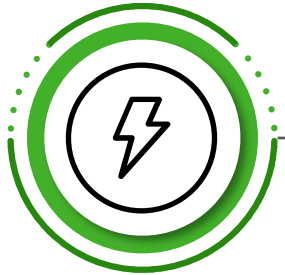
Businesses and Operators

- Tourism operators, organizations, event planners, other businesses
- Building materials suppliers
- Contractors
- Equipment suppliers

MEASURING PROGRESS – KEY PERFORMANCE INDICATORS

The research in this study measured several important aspects of the accessibility landscape in Nova Scotia. Below we outline measurement metrics and key outcomes recommended to monitor progress in accessibility over time, along with the enabling factors which would support these outcomes. Each goal includes suggested metrics that can be used to measure progress. There is an expectation that these metrics will improve with intervention, communication, and programs.

Goals	Measurement Metric	Benchmark (2024)
Key Outcomes		
1	High Levels of Accessibility	Average reported accessibility - general 49%
		Accessibility by category of tourism business (sector, new/existing, geography) Various
2	Strong Visitor Perceptions	Perception by prospective visitors that Nova Scotia tourism businesses are accessible To be determined
		Number of barriers to participation reported by visitors during their travels in Nova Scotia To be determined
Enabling Factors		
1	Businesses Confident in their Ability to Implement Accessibility Measures	Perception that technical requirements are easy to implement 45%
		Familiarity with guideline requirements 75%
		Perception that the guidelines would impact decisions to build/renovate 85%
2	Widespread Business Buy-In on the Benefits of Accessibility	Perception that tourism businesses in Nova Scotia should be accessible 93%
		Perception that increasing accessibility would increase visitation 56%
		Perception that implementing guidelines would improve public perceptions 75%
3	Minimal Barriers to Implementation	Perception that cost to implement would be reasonable 38%
		Perception that there is enough information available to help businesses understand guidelines 68%
		Familiarity with support programs available Various



Conclusions

Conclusions

The purpose of this project was to examine how prepared tourism businesses are to meet accessibility requirements, so that people of all ability levels may someday be welcome to enjoy the warm hospitality of Nova Scotia.

Many tourism operators see the potential benefits of making their establishments accessible. By accommodating individuals who use mobility aids or have other accessibility needs, businesses can attract more customers and increase their revenue. It is essential for businesses to recognize the economic advantages of accessibility and to create welcoming spaces for all visitors.

The Report provides valuable insights into how challenged the tourism sector in Nova Scotia will be to implement accessibility measures and to comply with upcoming accessibility regulations for the built environment.

Through this intensive review of the tourism sector, a significant portion of the industry currently reports accessibility barriers, emphasizing the need for action to improve standards. Tourism operators need help navigating the specific requirements of the accessibility measures. Further education and awareness is needed.

Normalizing accessibility as a standard practice in the tourism sector may appear as a lofty goal now, but with encouragement and support, operators can make improvements.

By helping tourism operators navigate accessibility regulations and resources, more accessible washrooms will be added. More door openers will be installed. Signage will be improved, and railings added. In some cases, the cost or difficulty to make improvements is small.

With dedicated efforts and intentional attitudes, the province's tourism industry can become a Canadian leader – if not a world standard – in accessibility improvements.

In time and with investment, people of all ability levels may be welcome to enjoy the warm hospitality of Nova Scotia's tourism industry.



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This report has been provided for the purpose of informing and assisting the Tourism Industry Association of Nova Scotia (TIANS) in partnership with Tourism Nova Scotia to complete a State of Readiness Report for Phase 2 of the Improving Accessibility in Nova Scotia's Tourism Industry initiative.

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