

crestview

INFUSE PR

NOVA SCOTIA

2025 Alcohol Consultation

Summary Report

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By: Crestview & Infuse PR

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Executive Summary

Executive Summary

As part of considering the expansion of alcohol retail access points, public consumption, and interprovincial trade, Nova Scotia undertook extensive qualitative and quantitative stakeholder consultation that included public opinion polling, written submissions and in-person engagement sessions. In total, a representative sample of 1,501 Nova Scotians participated in the polling, 61 organizations provided written submissions and over 120 participants took part in 25 in-person engagement sessions. Overall, more than 300 organizations were invited to participate.

Combined, these engagements reveal a province with a strong interest in supporting local businesses, sustaining existing structures, protecting local industry, and ensuring strong public health measures.

Across all consulted groups, the majority opinion is that alcohol is already widely accessible in Nova Scotia. There is very little support for expanding retail access across Nova Scotia. It is felt that the Province should remain mostly status quo – with room for improvements. This includes relying on the already established system with NSLC as the main point of oversight and accountability and main provider for warehousing, distribution and retail sales. While improvements to the overall alcohol model are welcomed, it is felt that NSLC is a strong provider and the NSLC Agency Stores are considered to be successful and sufficient within rural areas.



There is very little support for expanding retail access across Nova Scotia.

Through the polling we see a soft response to expanding retail purchasing locations specific to convenience stores, grocery stores, gas stations and large chain retailers. Support is mostly felt through Nova Scotians wanting some form of convenience – mostly in grocery stores, and through segments of the Convenience and Grocery Industries that want the ability to sell alcohol.

While there is very little appetite for expanding access, Nova Scotians and stakeholders strongly caution that if the Province decides to undertake any change, it must do so slowly, thoughtfully, managed with clear policies to ensure safety and accountability, and balanced by robust social responsibility measures

and protections for local businesses and vulnerable populations. The province has the ability to become best-in-class. With readily available information from other provinces, Nova Scotia can learn from the experiences of consumers and operators across Canada—specifically Ontario and its rush to market. It is recommended by all that if a change were to occur, to take the time to make decisions, start small, and make decisions iteratively.

There is a strong sense that this was only the beginning of a multi-step process and that stakeholders want to be meaningfully included in the next stages of discussion and decision-making.

As there was no proposed approach outlined for stakeholder input, many assumed the Province was planning to make a change. Therefore, the consultation uncovered two discernments: 1. the majority do not want change; however, as businesses that operate in Nova Scotia, 2. if the Province makes a change, they will have no choice but to adapt.

Current System Viewed as Accessible—Appetite for Change Exists

- Most Nova Scotians rate alcohol access as sufficient. The vast majority (83%) find alcohol more than accessible under the current NSLC and Agency Store system, with no distinction between urban and rural respondents.
- 55% oppose more retail points; opposition is stronger among women, rural residents, and non-drinkers.
- However, there is support for specific expansion in grocery, convenience, and gas stations. Support rises (54%) with grocery stores as the preferred additional retail location. There was little public support for gas station access.

Significant Economic and Community Implications

- Local brewers, large brewers, wineries, distilleries and grape growers emphasize that expansion into retail sales as proposed by the Province will not increase overall sales, but instead will redistribute existing sales across a wider range of retail outlets. Both large and small brewers said this kind of expansion would lead to higher costs for production and distribution, and those costs would have to be passed on, ultimately increasing the price to consumers.
- Local craft brewers, wine growers, and grape growers were, however, interested in more flexibility to expand sales through standalone retail outlets without needing to meet existing conditions related to grape

production or brewery operations. For example, opening a Nova Scotia craft beer or local wine retail store.

- Local craft brewers expressed interest in opportunities for collaboration, including cross-selling: the ability to sell other craft beer at their own retail outlets, as well as having the ability to sell their products through fellow craft breweries.
- Agency Stores, small rural businesses, and local alcohol producers fear being squeezed out by national and multinational brands, threatening community anchors and local economic resilience.
- Local product protection is a universal request. There are strong, repeated calls for mandated minimum shelf space (often cited as 20–50%) for local products in current and any new retail environment and clear, transparent labelling of Nova Scotia-made beverages. As an example, with the removal of American brands, local brands are seeing a lift in sales. With a stronger mandate towards local, the local share of market could increase significantly. This would be viewed as a game changer for the local markets, allowing Nova Scotia small businesses to thrive on their own merit.
- The Convenience Industry Council of Canada and some grocers view alcohol sales expansion as an opportunity for economic growth and rural revitalization.

Public Health and Social Risks Are Top Concerns

- Concerns related to health and safety risks emerged as the primary reasons for opposing expanded access. Both the public and stakeholders point to a range of risks including increased risk for underage drinking, impaired driving, addiction, mental health crises, violence and domestic violence, and added pressure on emergency services.
- Police and RCMP are already taxed when it comes to alcohol-related calls, including theft from NSLC and Agency Stores across the province. They see expansion as an additional avenue that would need security, training, and require intervention if and when situations escalate.
- Equity-deserving and vulnerable populations are also at risk. With strong emphasis placed on the disproportionate risk to youth, women, Indigenous peoples, and those with substance use disorders. Specifically, it is felt that many Nova Scotians with substance issues would lose their safe spaces—retail locations they could visit with no temptation or harm.
- Among health advocates, there is strong support for conducting a health impact assessment. They urge a pause on expansion until a rigorous,

Nova Scotia-specific health and social impact assessment can be completed.

- Lastly, health advocates broadly support the creation of a comprehensive alcohol policy for Nova Scotia.

Modernization Must Be Paired with Strong Regulation and Social Responsibility

- If the Province decided to move forward with a change in policy, there is overwhelming demand for robust regulatory safeguards, which include:
 - Limiting alcohol sales to beer, wine and ready-to-drink beverages; there was little appetite for spirits in expanded retail spaces—due to theft and product size
 - Mandatory staff training in responsible sales
 - Strong ID verification and age-check protocols
 - Clear, consistent licensing and operating rules
 - Minimum pricing policies to prevent price wars and overconsumption
 - Additional resources to enforce regulations
 - A level and fair playing field for all producers—big and small. This includes continued anti-inducement and anti-predatory trade practices (e.g. promotions, advertising, giveaways, branded fridges, etc.) to protect small/local brands and retail status quo of marketing and advertising among brands.
- NSLC oversight remains valued. Most support maintaining or even strengthening NSLC’s role, particularly for high-risk products like spirits and for regulatory consistency.

Strong Support for Interprovincial Trade, But with Local Caution

- There is strong public support for open trade (86%), but both the public and producers stress the need for reciprocal agreements to avoid flooding the Nova Scotia market with out-of-province products at the expense of local producers.
- Stakeholders urge Atlantic-focused first, not just national approaches, and want local product preference maintained in any liberalization.

Public Consumption and Product Type Limits

- Public consumption in designated spaces is divisive. Most felt they had no opinion on this topic, and the Province should consider common sense allowances. Like other provinces, allow trial spaces, or allow producers, restaurants, and others to use common sense in permitting to expand their spaces to allow for consumption. For instance, parking requirements for patios, on their grounds in common sense areas, such as expanded patios, a permit for the entire location versus many area-specific permits, and between allowing open consumption in spaces like the beach or trails—where consumption is already occurring.
- While public opinion is nearly evenly split, with concerns about safety, public intoxication, and enforcement weighed against arguments in favour of personal freedom and potential tourism/economic benefits. Nova Scotians believe that the main governing rules would remain in place – no drinking and driving, public intoxication, etc. They assume that if open consumption is allowed, it will naturally fall within normal laws.
- Product limitation is preferred, with a majority (56%) wanting restrictions on what can be sold in new locations (e.g., beer and wine only, not spirits).

Slow Implementation, Pilot, and Monitor

- If the Province proceeds with any changes to where alcohol can be sold, the change should be a phased, evidence-driven rollout. Stakeholders and many public respondents favour pilot programs, phased expansion, and the use of ongoing monitoring with clear metrics for harm and benefit—allowing for adjustments or reversal if negative impacts emerge.
- All groups call for ongoing, transparent engagement with communities, industry, health, and social service stakeholders throughout any modernization process.

Conclusion

While there is limited support for expanding alcohol access, Nova Scotians and their representative organizations express cautious openness to modernizing alcohol retail access if changes are pursued. The clear and repeated message is that such change must be gradual, tightly regulated, and anchored in the twin imperatives of public health and local economic resilience. A “proceed with caution” approach, prioritizing evidence, social responsibility, and ongoing engagement, is essential to ensuring any reforms serve the broad interests and unique values of Nova Scotia.

Modernize Responsibly:

- Begin with limited expansion, monitor closely, and review before wider rollout.
- Avoid full deregulation or privatization.
- Learn from other provinces' recent experiences in expansion.

Protect Local Industry and Community Anchors:

- Mandate strong local content and shelf space requirements for Nova Scotia products.
- Continue to support small/rural retailers and producers with marketing, financial, and logistical resources.

Just the Start of Stakeholder Engagement:

- Continue consultation, transparency and line of sight into decision-making.
- Stakeholders have experiences working with other provinces, and have a thorough understanding of what is and is not working with retail expansion.

Ensure Robust, Uniform Regulation:

- Require mandatory training, strong ID protocols, minimum pricing, and strict licensing for all retail channels.
- Maintain NSLC for distribution, invoicing, wholesale, and oversight.

Foster Fair Trade, But Safeguard Local Interests:

- Pursue reciprocal interprovincial and Atlantic-specific trade agreements that protect Nova Scotia producers.

Prioritize Health and Safety:

- Conduct a comprehensive health and social impact study before expanding retail access.
- Invest in addiction, mental health, and violence prevention supports.
- Create an Alcohol Policy for Nova Scotia.

Emphasize Social Responsibility and Equity:

- Design trauma-informed, equity-focused policies to protect vulnerable groups.
- Maintain alcohol-free public spaces and support community wellbeing.

The image features four glasses of beer, each with a thick head of white foam. The glasses are arranged in a slightly overlapping manner. The background is a solid, vibrant purple color. The text 'Consultation Sessions' is overlaid in the lower-left quadrant in a white, bold, sans-serif font.

Consultation Sessions

Consultation Sessions

A1. Methodology and Background

To support the Department of Finance and Treasury Board's review of alcohol retail policy options, Crestview and Infuse PR facilitated comprehensive stakeholder consultation with a broad array of stakeholders. This approach was designed to ensure that the diverse voices and unique circumstances of Nova Scotians were fully considered in the policy development. The sessions were qualitative in nature, allowing for an in-depth and spontaneous discussion with stakeholders.

Stakeholders were invited to the sessions via email invitation, and began with a logistics consultation meeting to decide timing, location, and whether the session would be held in-person, virtually or in a hybrid setting. Sessions were scheduled to occur between June 1–30, 2025. Sessions were approximately 2-hours in length.

Analysis

All session notes and discussion outputs were collected, organized, and systematically reviewed. A Braun and Clarke's thematic analysis framework was used to identify major themes, areas of consensus and disagreement, and specific stakeholder priorities. Patterns were examined both within and across stakeholder groups, with careful attention to Nova Scotia's distinct context and needs.

This analysis enabled the identification of core areas of support and opposition, industry and stakeholder specific differences, conditions under which stakeholders would support or oppose policy change, and stakeholders also offered recommendations to the Province in areas such as safeguards, best practices—using other provincial examples, and further consultation.

The discussions focused on the three main topics:

1. Where alcohol—such as beer, wine, spirits or ready-to-drink products are sold
2. Where alcohol products are able to be consumed
3. Removing trade barriers to allow for interprovincial trade

With the use of a discussion guide, stakeholders participated in a free-flowing discussion of the topics and responses to additional and follow-up probing questions.

Stakeholder Engagement Approach

In total, over 50 organizations were invited to participate, however not all engaged in the process. Stakeholders were selected based on their subject matter expertise and the likelihood that any proposed change would directly impact their organizations or communities. Together, they represent a wide breadth of perspective across health, industry, enforcement, and community interests.

Twenty-five (25) stakeholder engagement sessions were conducted between June 1 – August 21, 2025. The following stakeholders participated in the sessions:

Producers:

- Craft Brewers of Nova Scotia
- Craft Distillers Association of Nova Scotia
- Grape Growers Association
- Labatt / Oland
- Molson Coors
- Moosehead
- Peller Estates
- Wine Growers Association

Community Groups:

- Adsum House
- Alzheimer Society of Nova Scotia
- Atlantic Consortium on Injury Prevention (ACIP)
- Be The Peace Institute
- Canadian Cancer Society
- Fetal Alcohol Nova Scotia
- Injury Free Nova Scotia
- Leave Out Violence Nova Scotia (LOVE)
- MADD Canada
- Nova Scotia Alcohol Policy Coalition
- The Confederacy of Mainland Mi'kmaq
- YWCA

Industry:

- Canadian Federation of Independent Grocers
- Convenience Industry Council of Canada (CICC) – Atlantic Division
- NSGEU – Representing NSLC's employees
- NSLC Agency Stores

- Private Retailers
- Restaurant Association of Nova Scotia
- Restaurants Canada
- Retail Council of Canada

Safety / Enforcement:

- Nova Scotia Police Chiefs Association
- RCMP

Considerations

The insights and recommendations captured through the consultation sessions offer a strong, evidence-informed foundation for provincial policymakers. These findings reflect the unique needs and priorities of Nova Scotia’s communities, industry, and public health sectors. This approach ensures that any future alcohol retail policy decisions are grounded in comprehensive, community-driven analysis and are responsive to the unique realities of Nova Scotia.

Limitations

Because the process relied on stakeholder participation, results may be subject to selection bias toward more engaged or directly affected stakeholders. In consultation with the Province, Crestview and Infuse PR developed a stakeholder list and sought to reach a broad range of stakeholders. Some organizations were unavailable, chose not to respond, or declined to participate. Despite these limitations, the breadth and depth of the responses received offered a robust understanding of the key issues and values in Nova Scotia.

It is important to recognize that stakeholder perceptions, while offered in good faith and shaped by expertise, are ultimately subjective interpretations of government actions and intentions. As the Province did not propose a framework for stakeholder input, they provided responses using broad assumptions, assuming the government would be moving towards additional retail access, use of distribution models and taxation options. As such, these perceptions may at times be incomplete or based on assumptions, given the absence of a formal government position or plan.

A2. Consultation Sessions Summary

In response to the Government of Nova Scotia’s engagement on the potential expansion of alcohol retail access, a comprehensive cross-section of stakeholders contributed broadly in the sessions. These contributions reflect the province’s diverse social, economic, and community landscape.

Most stakeholders expressed an interest in the Province not making changes to the current policy, but to look towards opportunities for improvements a common sense changes to Nova Scotia’s current policy and operations.

NSGEU, local alcohol producers and business owners highlighted the importance of protecting Nova Scotia’s unique industry, warning that without mandated local content requirements and safeguards against inducements, shelf space in new retail environments could be dominated by large brands to the detriment of local products. Large producers also acknowledge the disadvantage that will occur to local producers should a policy change be made. Additionally, NSGEU, NSLC Agency and private store operators emphasized the strengths of the current system and warned of potential threats to rural service, price consistency, and small business viability.

Despite these divergent perspectives, there was broad consensus on the need for evidence-based, well-regulated change. Stakeholders widely agreed on the importance of strong regulatory oversight, such as those responsible for monitoring compliance with alcohol sales, advertising and promotion restrictions, and enforcing hours of sale, as well as ensuring a level playing field, responsible retailing, public education, and ongoing support for local industry. Many health, social service, and community groups called for a pause on any retail expansion until a comprehensive health impact assessment can be completed.



Stakeholder perspectives were wide-ranging and, at times, sharply divided.

Stakeholder perspectives were wide-ranging and, at times, sharply divided. Larger industry and grocery retail stakeholders were more inclined to support expanded consumer convenience, economic development, and improved access for local producers, referencing experiences and models from other provinces.

In contrast, public health organizations, social service agencies, First Nation, policing, and community coalitions voiced significant concerns about the risk of

increased alcohol-related harm—including impaired driving, gender-based violence, and impacts on youth and vulnerable populations—if access is expanded without robust controls.

Implications and Future Considerations

Availability and Access

All stakeholders felt Nova Scotians already have broad access to alcohol, across the province – access is not the issue.

Retailers and industry groups highlighted their own research, indicating consumer demand for greater convenience and choice, arguing that expanded access would support rural businesses—via their retail locations and keep spending local. However, NSGEU, NSLC Agency Store operators and additional stakeholders acknowledged Nova Scotia already has an established, and efficiently run convenience model with the rural Agency Stores. They recognized that unchecked expansion could jeopardize NSLC employee jobs, and undermine service in smaller communities, especially with those stores that have already made great investments in their community to operate an NSLC Agency Store. Additionally, adding more retail access reduces product diversity, and disrupts established community anchors. There was also concern among community, safety and health organizations that increased access could further entrench drinking culture, particularly among vulnerable, youth and university populations.

Future Considerations:

- Balance modernization with focus on access in underserved and rural areas by strengthening existing Agency Store models.
- Consider phased or pilot expansions to monitor impacts before wider rollout.
- Consult with community leaders and rural stakeholders to ensure geographic equity and community cohesion.
- Integrate trauma-informed and equity-focused policymaking to protect vulnerable groups.

Economic Impact and Local Industry


Local producers—craft brewers, distillers, grape growers and wineries—expressed strong concerns about losing market share to national and multinational brands if retail expansion proceeds without local content protections. There was significant anxiety that new points of sale, especially in convenience and grocery stores, could crowd out Nova Scotia-made products, undermining rural economies and long-term industry sustainability. Citing the

removal of American products as an example, local producers have experienced an increase of sales, with fewer products acting as competition.

Large retailers were more familiar with alternative retail sales models, and agreed that changes in Nova Scotia would be detrimental to local producers, however, they would maintain their market share and experience the benefits of convenience. At the same time, the Convenience Industry and large grocers believed there are opportunities for economic growth, increased investment, and job creation, particularly in rural communities. However, NSGEU worried about the potential job loss for NSLC employees.

Future Considerations:

- Mandate minimum shelf space or local product quotas in all retail environments.
- Support the expansion of private and Agency Stores with a local focus, rather than unregulated retail expansion.
- Ensure fair and reciprocal interprovincial trade agreements that protect Nova Scotia producers.



Across all stakeholder groups, there is agreement that responsible retailing must remain a core pillar of any system change.

Regulation and Social Responsibility

Across all stakeholder groups, there was agreement that responsible retailing must remain a core pillar of any system change. The risk of deregulation—such as price volatility, predatory inducement practices, and weakened enforcement—could undermine public confidence and safety. Stakeholders stressed the need for strong, adaptive, and transparent regulation, including clear rules for trade spend, minimum pricing, licensing, and ongoing compliance monitoring.

Future Considerations:

- Maintain or strengthen NSLC oversight, especially for spirits and high-risk products.

- Establish uniform standards for training, security, and responsible service across all retail channels.
- Implement clear guidelines for promotions, inducements, and pricing to ensure a level playing field.
- Create mechanisms for ongoing consultation and feedback with industry, community, and health stakeholders.

Health and Public Safety

There was broad and deep concern among public health organizations, enforcement agencies, and community advocates that expanding alcohol retail access could lead to increased alcohol-related harms. Risks included higher rates of impaired driving, gender-based violence, mental health crises, underage access, and strain on emergency and social services. Law enforcement and health professionals emphasized that any changes to the retail sales model must be matched with robust regulatory controls, public education, and investment in prevention, monitoring, and support services.

Future Considerations:

- Conduct a comprehensive health impact assessment before implementing any policy changes.
- Strengthen enforcement capacity and ensure ongoing training for all retail staff.
- Develop targeted public education campaigns on responsible consumption and impaired driving beyond what is currently being done.
- Monitor and regularly report on health and safety outcomes, adjusting policy as needed to mitigate harms.

Community and Social Impact

Stakeholders representing First Nation, health, gender equity, and social service sectors raised concerns about how expanded alcohol access could exacerbate existing social challenges, including housing instability, domestic violence, and economic vulnerability. There was a clear call for trauma-informed, equity-oriented policy that centers on the needs of women, youth, Indigenous communities, and people with substance use disorders.

Future Considerations:

- Design and implement targeted social supports and funding for services that address alcohol-related harms.
- Ensure policymaking is informed by ongoing consultation with equity-seeking and vulnerable groups.
- Maintain and expand alcohol-free public spaces and support safe consumption strategies at events and in communities.

Interprovincial Trade

While many supported reduced interprovincial trade barriers to improve consumer choice and support Canadian producers, local stakeholders warned that national liberalization without reciprocal arrangements could disproportionately benefit larger provinces and brands. There was skepticism among many stakeholders that national market opening will help small Nova Scotia producers, and a strong preference for an Atlantic-focused approach that leverages the region's agricultural strengths. Many mentioned the informal, hand-shake agreement dubbed the "Maritime Beer Accord" as a similar structure – allowing trade to benefit the Atlantic provinces in the spirit in which it was agreed to.

Future Considerations:

- Negotiate reciprocal trade agreements that ensure Nova Scotia products have meaningful access to other provincial markets.
- Prioritize New Brunswick, Maritime, and Atlantic regional collaboration on trade, marketing, and shelf space.
- Monitor and evaluate the impact of trade liberalization on local industry, adjusting policy to protect provincial interests.

A3. Topic 1: Where Alcohol is Sold

Craft Brewers Association

Nova Scotia’s craft brewers are at the forefront of the local beverage sector’s growth, yet many felt that their potential is constrained by the current NSLC retail model, which limits the breadth of their listings and their ability to reach new consumers.

During consultations, these brewers voiced limited openness to expanded alcohol sales through convenience, grocery, or additional private/Agency outlets with conditions. They were open to anything that will allow their businesses to thrive. They were insistent that any policy shift must be accompanied by robust, enforceable protections for locally produced beer, such as mandated minimum shelf space, clear “local” definitions, and status quo restrictions on inducements or incentives that allow multinational brands to dominate high-traffic retail spaces.

They expressed concern about the ability of smaller brewers to provide sufficient volume to meet the demands of an expanded market and cautioned that the smaller producers could be sidelined in a broader retail environment. Specifically, the volume requirements put in place by NSLC for warehousing and distribution.

The Craft Brewers Association pointed out that privatization or uncontrolled expansion risks crowding out smaller producers.

They also emphasized that, should the Province move in this direction, producers should have a say in where their products are sold geographically. Or at the least, be able to supply specific areas without needing to be able to supply the entire province.

Drawing from the experiences of other provinces, particularly Ontario, the Association pointed out that privatization or uncontrolled expansion risks crowding out smaller producers, as only the largest or best-known brands are likely to secure shelf presence in competitive environments. They further emphasized that private retailers and NSLC Agency Stores currently provide a more diverse and local-focused selection than NSLC, and that expanding these

models could, under the right parameters, foster both consumer choice and the sustainability of rural and small-scale breweries.

The Association noted the importance of direct lines of communication and partnerships with the Province to ensure that policy changes support not only established breweries but also innovative new entrants and local entrepreneurs.

Major Breweries

The major breweries, with extensive experience across Canada's diverse regulatory landscape, approached the issue of expanded retail access from the perspective of operational stability and market fairness. Again, like many stakeholders they assumed the Province is making a decision towards a policy change and therefore would be ready to adapt. However, they expressed concerns.

Participants acknowledged that a retail expansion increases their operating costs (e.g. distribution, marketing, etc.) but would not increase overall consumption and sales. This insight was based on what they experience in the other provinces with alternative retail sales models.

These companies highlighted that expansion dramatically increases distribution complexity and cost, requiring more frequent deliveries of smaller quantities to more locations. This, they cautioned, could have downstream impacts on pricing, supply chain reliability, and profitability for both breweries and local stores. With Nova Scotia already having the second most expensive beer in Canada, this change would again increase price to consumers.

The major brewers urged Nova Scotia to avoid hasty or politically driven reforms, emphasizing the need for clear, phased implementation, robust logistics planning system. Details such as IT infrastructure and ordering systems would be overwhelming, however, a continued central role for the NSLC as wholesaler and regulator, especially for high-strength spirits would be ideal if expansion occurs.

They collectively supported giving retailers flexibility in product selection but warned against government-imposed shelf space mandates, arguing that consumer demand should ultimately dictate inventory, and it is hard for small retailers—with production and delivery to meet those imposed quotas. Furthermore, these brewers cautioned against relaxing rules on trade spend or inducements, noting that experiences in other provinces show that weak regulation in this area can result in anti-competitive practices and higher prices for consumers.

Wineries & Vineyards

Nova Scotia's wine sector, represented by both grape growers and producers, is acutely aware of the risks that retail modernization poses to its premium, artisanal identity.

Stakeholders from this sector stressed that the province's wines rely on a clear connection to local terroir (i.e., the complete natural environment in which a particular wine is produced) and the use of 100% Nova Scotia grapes, which underpins both their marketing and their economic viability.

There was a deeply held concern that retail expansion, particularly into convenience or general grocery stores, would introduce fierce competition from imported and mass-produced wines, eroding the market share of local producers.

They pointed to the years of up-front investment required to establish vineyards and the vulnerability of the sector to sudden changes in demand. In addition, wine growers, grape growers, and producers advocated for enforceable local content requirements, transparent labelling, and the creation of a Nova Scotia Wine Authority to oversee quality standards and certification.

They further recommended that, should retail expansion proceed, it be focused on curated, high-end environments such as specialty delis and fine restaurants, where the narrative and value of Nova Scotia wines can be preserved and promoted.

Craft Distillers

Craft distillers echoed many of the concerns expressed by other local producers, emphasizing the importance of maintaining a level playing field and the risk that convenience store expansion would reduce the visibility of local craft spirits in favour of mainstream brands.


The distillers praised the NSLC's current distribution model for its efficiency and equitable treatment of small producers, arguing that a move to direct-to-retailer models would impose disproportionate logistical and financial burdens on the smallest players.

The Association recommended the establishment of dedicated craft-only stores, the ability to open secondary retail locations without additional production requirements, and the retention of NSLC's central role in distribution.

The distillers also highlighted the role of their industry in supporting local agriculture and rural economies, and called for ongoing consultation to ensure that any policy changes do not inadvertently marginalize small-batch producers.

Independent Grocers

Independent grocers, often family-owned and integral to rural communities, advocated for an inclusive approach to retail expansion that does not favour large national chains at the expense of smaller players.



Independent grocers stressed that they already provide accessible retail options in many communities.

They stressed that independent grocers already provide accessible retail options in many communities and are well-positioned to meet consumer demand for convenience and local products.

The Canadian Federation of Independent Grocers argued that any new alcohol retail framework should be open, competitive, and accompanied by robust staff training to ensure responsible sales.

They also highlighted the importance of direct sales from local producers and mechanisms to ensure that rural stores are not disadvantaged by new regulations or market structures.

Convenience & Grocery Stores

The convenience sector, represented by the CICC and large grocer representatives, was perhaps the most enthusiastic about the prospect of expanded alcohol sales. They highlighted their experience with age-restricted products, such as tobacco and lottery, and their ability to deliver consumer convenience, particularly in rural and underserved areas.

The sector projected significant economic benefits, including job creation and rural revitalization, and committed to mandatory staff training, improved security, and collaboration on responsible retailing standards.


Additionally, they recommend that if the Province makes a change, their organizations be allowed to rely on their already established retail experiences to negotiate directly with suppliers, utilize their own already established distribution and warehousing, and in-store marketing.

However, they also cautioned that requirements for participation should be fair and not so restrictive as to limit access for smaller stores. They recommended a phased approach, initial limitations to beer, wine, and ready-to-drink products, and ongoing joint policymaking with the government.

Private Retailers

Private retailers, who already operate under substantial compliance oversight, expressed conditional support for expanded sales locations, provided that regulatory safeguards and mechanisms to ensure prominence for local products are maintained.

They voiced concerns about the potential for larger, well-capitalized competitors to displace local brands and reduce the diversity of offerings available to Nova Scotians. Private retailers advocated for continued investment in staff training, robust age-verification systems, and policies that promote or incentivize the stocking of products from Nova Scotia-based producers.

 Health organizations, law enforcement, anti-violence organizations, and social service agencies were unanimous in opposing expanded alcohol retail access.

Health, Community Safety, and Social Service Groups

Health organizations, law enforcement, anti-violence organizations, and social service agencies were unanimous in opposing expanded alcohol retail access. They cited a comprehensive body of research linking higher outlet density and retail convenience to increased alcohol-related harms, including impaired driving, domestic violence, addiction, and mental health crises.

These groups stressed that the current NSLC/Agency Store model is effective in balancing access with harm reduction and warned that any move toward privatization or expansion would require significant new investment in prevention, health care, and enforcement.

With NSLC already experiencing law enforcement issues, which span from theft to violent incidents, law enforcement representatives raised concerns about

increased theft, public intoxication, and the ability of smaller stores to maintain robust compliance and security standards.

First Nation

The Confederacy of Mainland Mi'kmaq, while noting that the organization did not represent all Mi'kmaq communities, discussed potential changes to alcohol sales policy with attention to accessibility, community impacts, and the unique jurisdictional context of Mi'kmaq communities. They raised concerns about increased accessibility, particularly in light of rising homelessness and addiction, and the potential for disproportionate effects on youth and vulnerable populations if alcohol were made available in corner stores. They also clarified that alcohol sales in First Nation communities fall under federal jurisdiction and that community bylaws, set by local chief and council, take precedence. They would anticipate discussing any future changes with the Province, similar to the structures put into place when broadening access to cannabis and gaming within their communities.

The presence of an NSLC in Eskasoni was noted, with concerns that broader retail access could undermine current standards. Participants also underscored the importance of engagement with the Assembly of Mi'kmaq Chiefs and all 13 Mi'kmaq communities, the trade-offs between economic benefit and social harm, and cultural protocols related to alcohol consumption.


A4. Topic 2: Where Alcohol Products Can Be Consumed

Craft Brewers Association

The craft beer sector expressed an interest in modernizing Nova Scotia’s approach to alcohol consumption, particularly concerning permitting when it comes to opportunities such as public festivals, community events, and special occasions.

While recognizing the value of responsible public consumption in fostering a vibrant social and tourism sector, brewers cautioned that existing licensing and permitting processes are overly complex and inflexible, creating barriers for both organizers and producers.

They recommended simplifying event licensing and allowing for more flexible arrangements that promote responsible consumption—associated with already established restaurants, breweries, and festival and event spaces, while maintaining public safety.



The craft beer sector expressed an interest in modernizing Nova Scotia’s approach to alcohol consumption.

The Association also noted that responsible outdoor consumption is common in many jurisdictions around the world and argued that Nova Scotia should trust adults to make safe choices, provided that clear rules and enforcement are in place to address public intoxication and underage drinking.

Wineries & Vineyards

Wine producers supported the idea of curated, high-quality consumption environments—such as fine dining establishments and specialty events—where Nova Scotia wines can be paired with local food and culture.

They argued that these settings are best suited to promote the premium nature of their products and to educate consumers about the unique value of local wine.

The sector expressed concern that expanding consumption to unregulated public spaces would risk undermining the reputation of Nova Scotia wines and could detract from the careful cultivation of a food and wine tourism culture.

Producers felt that on-site permitting and licensing could be improved. With many licenses on site for restaurants, tasting spaces, consumption, and special

occasion spaces, it would improve operational efficiencies both with the producers and the Province, to have a more flexible and common sense style permit.

Additionally, specifically the Wine Growers of Nova Scotia would be interested in the ability to set up their own wine-specific private retail location, to sell local products themselves, not tied to their vineyard. Producers called for streamlined ability to cross-sell local wine, beer, and spirits at festivals, as a way to foster collaboration and promote responsible consumption.

Craft Distillers

Craft distillers echoed calls for a more flexible and accessible event licensing regime, noting that current regulations hinder both consumer choice and the ability of small producers to build brand awareness through tastings and on-site events.

They recommended allowing distillers to open secondary retail and tasting locations, which would help drive both sales and tourism, and advocated for policies that support responsible consumption in a broader range of settings while maintaining public order and safety.

Retailers (Convenience, Independent Grocers, Private)

Retailers generally supported maintaining existing restrictions on open consumption of alcohol, while remaining open to permitting alcohol at well-regulated, permitted events and festivals.

They recognized the potential risks of open consumption in public spaces and emphasized the need for clear enforcement, robust public education, and careful consideration of local context.

Retailers also acknowledged that festival and event licensing processes should be streamlined for experienced operators with a track record of responsible sales.

Major Breweries

Major breweries supported a cautious, phased approach to expanding consumption locations, recommending pilot projects and close collaboration with municipalities and enforcement agencies. They emphasized the importance of clear rules, public education campaigns promoting moderation and responsible consumption, and a focus on lower-alcohol products in expanded settings.

The breweries also noted that compliance and enforcement requirements would likely increase with broader consumption permissions and stressed the need for adequate resources for regulators and law enforcement.

Health, Social Service, and Safety Groups

Health, gender-based violence prevention, and safety organizations strongly opposed any expansion of open consumption locations. Drawing on evidence from other provinces and countries, they argued that expanded access to open consumption is associated with higher rates of violence, vandalism, impaired driving, and negative health outcomes, particularly for vulnerable populations.

These groups stressed the need to maintain current restrictions, invest in harm reduction initiatives, and ensure that any changes are informed by comprehensive health and safety impact assessments.

They also called for increased support for frontline services, including crisis shelters, mental health care, and addiction treatment, in anticipation of higher demand if consumption rules are relaxed.

First Nation


While Mi'kmaq event and ceremonial spaces typically prohibit alcohol, there was some openness to more flexible public consumption rules in the broader Nova Scotian context, provided safeguards and clear communication are in place to ensure responsible use.

A5. Topic 3: Removing Trade Barriers to Allow for Interprovincial Trade

Craft Brewers Association

Craft brewers were cautiously supportive of removing interprovincial trade barriers, provided that reforms are reciprocal, fair, and do not undermine the market share of Nova Scotia-made beer.

They emphasized that national liberalization efforts often benefit the largest players, whose scale and resources allow them to outcompete smaller local breweries both at home and in other provinces.



Craft brewers emphasized that national liberalization efforts often only benefit the largest players.

The Association advocated for an Atlantic regional approach to trade liberalization as a first step, with reciprocal agreements ensuring that Nova Scotia products have meaningful access to neighbouring markets. Similar to the already established “Maritime Beer Accord,” hand-shake style deal made in the past.

They also called for ongoing review of markup structures and local shelf space rules to ensure that small and growing breweries are not disadvantaged.

Wineries & Vineyards

Wine producers were similarly supportive of reducing trade barriers, but only on the condition that reciprocal access and strong local content protections are in place. They argued that Nova Scotia’s wine sector is still in its infancy and risks being overwhelmed by larger, more established producers from outside the region if safeguards are not included.

The Association recommended beginning with Atlantic regional agreements and only expanding nationally if it is clear that Nova Scotia wines will have a fair chance to compete in other markets.

They also highlighted the need for clear labelling and branding to protect the identity and reputation of Nova Scotia wines. Similar to the VQA in Ontario, and the most stringent requirements that come along with a similar distinction.

Craft Distillers

Craft distillers supported the principle of interprovincial trade reform but highlighted the logistical and operational challenges that small producers would face without the support of a centralized distribution network like the NSLC.

They called for policies that allow for direct-to-consumer and business-to-business shipping, but cautioned that requiring small producers to manage their own distribution to retailers in other provinces could create significant barriers to participation.

The distillers advocated for policies that ensure fair treatment for Nova Scotia products and for continued government support in navigating new regulatory frameworks.

Major Breweries

Major breweries, with established distribution networks and experience in multiple jurisdictions, supported the removal of interprovincial trade barriers, provided that national standards for distribution, pricing, and regulation are adopted. They argued that such harmonization would promote competition, consumer choice, and operational efficiency, and called for an end to discriminatory markups and preferential treatment for local products in other provinces.

Retailers

Retailers, including convenience stores, independent grocers, and large grocers, expressed strong support for trade liberalization, arguing that it would increase product variety, support competitive pricing, and benefit consumers.

They also noted the importance of policies to ensure continued prominence for Nova Scotia-made products and the need for mechanisms to support rural and independent retailers in a more open market.

Health, Social Service, and Safety Groups

Health, social service, and safety organizations raised concerns that opening the market to competition from larger provinces could undermine the buy-local movement and reduce the viability of small Nova Scotia producers. They recommended that the Province prioritize policies that incentivize the purchase of local products and monitor the impact of trade reforms on community wellbeing and small business sustainability.

First Nation

While increased competition from interprovincial trade could benefit the sector economically, there is currently limited direct involvement of Mi'kmaq communities in Nova Scotia in alcohol production or sales, so the impact may be minimal.

A6. Consultation Session Conclusions

While opinions on alcohol retail reform appear divided, overall support for expanded access is limited. The in-person stakeholder consultations on expanding alcohol retail access in Nova Scotia highlight a province at a critical juncture, where economic ambitions, public health imperatives, local industry sustainability, and community values intersect.

Should the Province choose to move forward, any changes should be approached in a phased and thoughtful manner, with careful consideration of public health, community impact, and equity among producers.

Public Health and Safety

There is widespread consensus among health professionals, public safety officials, and social service organizations that expanding alcohol retail access carries significant risks. The evidence and experience shared point to a direct relationship between increased outlet density and higher rates of alcohol-related harm, including impaired driving, gender-based violence, addiction, and mental health challenges.

Community and health-related stakeholders repeatedly called for a public health-first approach, advocating for a comprehensive health impact assessment, a Nova Scotia Alcohol Policy, strong regulatory controls, and increased resources for prevention, education, and enforcement before any changes are made.



The economic discussion is sharply divided.

Economic Impact and Local Industry

The economic discussion is sharply divided. Many convenience retailers, large-scale brewers, and some independent grocers see potential for rural revitalization, job creation, and consumer convenience. They point to models in other provinces and suggest that modernization can offer opportunities for both local and national producers.

In contrast, Agency Store operators, craft producers, and small rural businesses express deep apprehension. They warn that, without firm local content protections and market safeguards, expanded retail access will favour larger and


multinational brands—even those designated local, undermine local entrepreneurship, and threaten the viability of Nova Scotia’s alcohol sector.

The prevailing recommendation is for robust measures to protect and prioritize local products in any new retail environment.

Availability, Access, and Community Wellbeing

Stakeholders are split between those who seek modernization—emphasizing customer choice and convenience—and those who caution that Nova Scotia’s current system already provides broad, equitable access, particularly in rural and underserved areas. There are concerns that further expansion could fragment community-based service, reduce product diversity, and dilute the unique character of Nova Scotia’s retail landscape.

Community groups and Agency Store operators emphasize that their outlets are more than businesses; they are vital community hubs supporting local identity and resilience.



The prevailing recommendation is for robust measures to protect and prioritize local products in any new retail environment.

Regulation, Oversight, and Social Responsibility

The need for strong, adaptive, and transparent regulation is a near-universal theme. Stakeholders agree that any policy changes must include minimum product pricing, rigorous staff training, mandatory responsible service certification, anti-inducement policies, and ongoing public education campaigns.

There is clear apprehension that deregulation or inconsistent oversight could lead to price volatility, predatory retail practices, and diminished consumer protection.

Further engagement with First Nation Chiefs and Councils was emphasized, recognizing that individual leadership holds ultimate decision-making authority, and that alcohol consumption in community is not aligned with Mi’kmaq cultural or spiritual values.

Interprovincial Trade and Market Structure


Views on interprovincial trade liberalization are mixed. Some stakeholders see opportunity in harmonization and reciprocal regional agreements, especially

within Atlantic Canada. However, there is significant concern that broad national liberalization could disadvantage Nova Scotia's producers, given their smaller scale and limited access to out-of-province markets.

The consensus is that any movement on trade must be cautious, reciprocal, and include robust local content protections to ensure fairness for Nova Scotia producers.

Social Equity and Vulnerable Populations

First Nation, equity-seeking organizations and social service providers highlight the disproportionate risks that expanded alcohol access poses to vulnerable populations. They stress that trauma-informed, equity-focused policy is essential to avoid exacerbating issues such as homelessness, addiction, and community violence. The call is for policies that protect marginalized groups and maintain alcohol-free public spaces.



Equity-seeking organizations and social service providers highlight the disproportionate risks that expanded alcohol access poses to vulnerable populations.



Written Submissions

B. Written Submissions

B1. Methodology and Background

To support the Department of Finance and Treasury Board’s review of alcohol retail policy options, Crestview and Infuse PR facilitated a province-wide submission process, inviting stakeholders to share written submissions with the Province. This approach was designed to ensure that the diverse voices and unique circumstances of Nova Scotians were fully considered in the policy development process.

Participants were invited via email on May 30, 2025, with multiple reminders sent throughout June 2025. Invitations were extended to an invitation-only list of organizations and individuals representing health, local and national alcohol producers and industry associations, NSLC Agency Stores and private retailers, municipal leaders, advocacy and community groups, and small business owners.

Stakeholders were invited to provide written responses, and given a standardized set of guiding questions addressing:

1. Their overall position on expanding alcohol retail access
2. Anticipated impacts on their organization and the community
3. Recommended conditions or safeguards, and
4. Future policy recommendations

Submissions addressed key topics such as economic development, access and convenience, health and safety, social responsibility, regulatory oversight, rural and small business sustainability, local product representation, and interprovincial trade.

Analysis

All submissions were collected, catalogued, and systematically reviewed. Using a Braun and Clarke’s thematic qualitative analysis framework, Crestview’s research team identified major themes, areas of consensus and divergence, and specific stakeholder priorities. Patterns were analyzed both within and across stakeholder groups, with particular attention to the Nova Scotian context.

This method enabled the identification of:

- Core areas of support and opposition
- Regional and sectoral differences
- Conditions under which stakeholders would support or oppose policy change

- Recommendations for safeguards, implementation best practices, and further consultation

Considerations

The insights and recommendations captured through this qualitative, submission-based methodology provide an evidence-informed foundation for provincial policymakers, reflecting Nova Scotia's unique needs and the priorities of its communities, industry, and health sector stakeholders. This approach ensures that any future alcohol retail policy decisions are grounded in comprehensive, community-driven analysis.

Limitations

The process, which relied on voluntary written submissions, may be subject to selection bias toward more engaged or directly affected stakeholders. Although Crestview and Infuse PR developed a stakeholder list in consultation with the Province and sought to reach a broad range of participants, some individuals were unavailable or chose not to respond. Despite these limitations, the breadth and depth of the responses received offered a robust understanding of the key issues and values in Nova Scotia.

It is important to recognize that stakeholder perceptions, while offered in good faith and shaped by expertise, are ultimately subjective interpretations of government actions and intentions. As the Province did not propose a framework for stakeholder input, they provided responses using broad assumptions, assuming the government would be moving towards additional retail access, use of distribution models and taxation options.

As such, these perceptions may at times be incomplete or based on assumptions, given the absence of a formal government position or plan.

B2. Written Submission Summary

In response to the Government of Nova Scotia’s consultation on the potential expansion of alcohol retail access points, a broad cross-section of stakeholders submitted written feedback reflecting the province’s distinct social, economic, and community landscape. Organizations invited to make submissions were selected for their expertise across health, industry, enforcement, and community sectors, and their potential to be directly affected by any proposed changes. In total, 61 stakeholder submissions were received.

The submission process revealed a diverse range of perspectives, encompassing industry and retail representatives, health experts, local producers, Agency Store operators, advocacy groups, and community organizations.

Submission views were diverse and often polarized. Grocery, retail and business association stakeholders advocated for increased consumer convenience, economic opportunity, and enhanced access for local producers, often referencing models in other provinces and emphasizing the need for fair competition and local product support.

In contrast, health organizations, medical associations, community groups, unions, and representatives from the restaurant sector opposed expanding sales to convenience stores, grocery stores, and gas stations, expressing deep concern about the potential for increased alcohol-related harms, including risks to youth, vulnerable populations, and overall community health.

While large and small producers of beer and wine were not convinced of the need to expand sales to convenience stores, grocery stores, and gas stations, they conveyed a willingness to collaborate with government to explore a model that balances market opportunity with the needs of producers, communities, and public health.



Current Agency Store operators frequently noted the strengths of the existing system.

Current Agency Store operators frequently noted the strengths of the existing system, highlighting the risks that further privatization could pose to rural service, price consistency, and the viability of small, community-rooted retailers.

Local alcohol producers also voiced apprehension that, without mandated local content requirements and enforced protections against inducements and trade

spend, shelf space in expanded retail environments would be dominated by large national and multinational brands, not local Nova Scotian products.

Despite divergent views, should the Province proceed with expanding retail alcohol locations, stakeholders consistently called for a careful, evidence-based approach to any policy change. There was widespread agreement on the need for clear regulation, a level playing field, and ongoing support for responsible retailing, public education, and local industry development. Many health and community groups urged the government to pause any expansion until a comprehensive health impact assessment and Nova Scotia Alcohol Policy are completed in conjunction with this consultation.

The findings from this consultation provide a nuanced, community-informed foundation, highlighting the importance of balancing economic opportunity, local benefit, responsible retailing, and public health in any decision on alcohol retail expansion in Nova Scotia.

Implications and Future Considerations

Health and Public Safety

Health organizations, such as Doctors Nova Scotia, Canadian Cancer Society, Nova Scotia Health Coalition, Community Health Boards, warn that expanded retail access may lead to higher alcohol consumption, increased hospitalizations, impaired driving, and greater risk of chronic diseases and cancers.

Greater retail availability could make alcohol more accessible to youth, vulnerable populations, and people in recovery, raising concerns about underage drinking and relapse triggers.

Moving sales to less regulated environments (e.g., convenience stores, gas stations) may reduce effective age verification, responsible service, and public health messaging.

Future Considerations:

- Many of the health stakeholders recommend pausing policy changes until an independent health assessment is completed and a Nova Scotia Alcohol Policy is in place.
- Stakeholders call for point-of-sale warnings, education campaigns, and clear labelling regarding alcohol's risks in addition to increased funding for community and health organizations that support people affected by alcohol harms.
- Health stakeholders emphasize the need for strong, enforceable rules and ongoing monitoring to protect the community and provincial safety.

Economic Impact and Local Industry

Industry groups (Retail Council of Canada, Beer Canada, CFIB, and associated breweries) anticipate economic benefits such as increased retail investment, job creation, and improved market access for local producers.

Existing Agency Store operators and small producers expressed concerns and fears over the loss of sales, potential business closures, and reduced viability of both their stores and alcohol products, respectively, especially in rural areas. The predominant concern from smaller producers is that larger national and multinational brands will dominate shelf space if the expansion of alcohol retail access points were to go through.

Many producers cite higher distribution and logistics costs with increased retail points, risking higher consumer prices and lower margins for those selling alcohol.

Future Considerations:

- Many industry stakeholders call for mandated local content requirements (e.g., 20–50% shelf space), support for cross-selling, and secondary retail licenses for producers.
- Proposals include maintaining and regulating trade inducements, ensuring equal access to shelf space, and maintaining or increasing NSLC oversight on pricing and distribution.
- Some industry stakeholders suggest additional government-funded marketing for local products and tiered tax/markup structures to support small and rural producers to mitigate the impacts of any future policy change.

Availability and Access

Retail and grocery industry submissions highlight the benefits of “one-stop shopping” and improved access, especially in underserved or rural communities.

Health and community organizations caution that increasing outlet access may not match consumer demand and could lead to overconsumption and undermine social responsibility.

Future Considerations:

- Suggestions include using the Agency Store model or expanding private wine and specialty stores (PWSS) with local content mandates rather than full privatization.
- Consideration for rural and small community access is seen as critical, ensuring no loss of service in less profitable areas.

Regulation and Social Responsibility

Many warn that rapid or poorly executed and regulated retail access point expansion could undermine responsible retailing, lead to price volatility, and increase regulatory burden, particularly in the case of Agency Stores.

Without more resources to regulate financial and other incentives, large breweries or distilleries may dominate through shelf space and market share, effectively shutting out small producers.

Future Considerations:

- Calls for clear, enforceable rules on pricing, trade spend, minimum price floors, and consistent responsible service training.
- Many stakeholders recommend continued consultation and transparency in policy development.

Interprovincial Trade

While some stakeholders see additional opportunity in reduced trade barriers, small and local producers are skeptical that open borders will provide meaningful new markets, fearing instead increased competition from larger out-of-province brands, which could drive out or eliminate local producers.

Future Considerations:

- Suggestions for regional cooperation and reciprocal DTC (direct-to-consumer) or licensee shipping among Atlantic provinces.
- Stakeholders call for local product preferences and negotiated agreements to ensure Nova Scotia producers are not disadvantaged by larger producers in other markets.

Community and Social Impact

Agency Stores and rural stakeholders note the importance of alcohol retail in supporting local economies and serving as community hubs.

Submissions stress the need to consider the disproportionate impact of expanded access on marginalized groups, rural communities, and those affected by substance use.

Future Considerations:

- Recommendations include trauma-informed policy, special protections for vulnerable populations, and maintaining alcohol-free public spaces.

Local

Nova Scotia stakeholders, including local producers, industry associations, health advocates, and rural communities, broadly support a “local-first” approach to alcohol policy modernization. They endorse targeted reforms that empower Nova Scotia–grown, made, and bottled products, strengthen rural economies, and foster innovation among small producers.

There is strong consensus against broad liberalization or privatization that could undermine local business sustainability, public health, or fair competition, especially if it increases market power for large multinational brands or expands alcohol access in ways that raise health and social risks.

Should the Province proceed with expansion, all groups call for robust, enforceable protections for local products, strict social responsibility standards, and evidence-based, incremental changes guided by comprehensive health and community impact assessments. The shared priority is a balanced approach that sustains local economic, agricultural, and community benefits while maintaining Nova Scotia’s commitment to public health and social well-being.



There is strong consensus against broad liberalization or privatization.

B3. Key Findings

Breweries

Overall Position on the Topic

Nova Scotia’s craft breweries have reservations about a modernized alcohol policy, but are prepared to engage constructively, provided that any changes strongly prioritize the interests of local, independent producers.

There is a consistent concern that, without robust safeguards, larger multinational breweries will dominate new retail channels, pushing out local craft brands and reducing consumer choice for locally made products.

Breweries advocate for policy frameworks that actively protect and promote Nova Scotia-made beer, emphasizing that locally focused regulations are essential for sustaining the industry’s positive impact on employment, rural development, and the culture of the province. Some breweries, particularly those serving rural or niche markets, emphasize the importance of flexible, decentralized models and warn against urban-centric, one-size-fits-all solutions.

Conversely, a minority of breweries are strongly opposed to any loosening of retail restrictions, arguing that the current regime is the only thing standing between small producers and the overwhelming market power of national and international brands.



There is a real fear that new retail channels will favour high-volume, well-funded brands.

If Policy Change is Made

Nova Scotia’s brewery stakeholders view the potential impact of policy changes as highly contingent on the presence or absence of local protections. Without explicit requirements for local shelf space or support for small producers, many breweries anticipate negative consequences such as higher distribution costs, thinner profit margins, and reduced market access.

There is a real fear that new retail channels will favour high-volume, well-funded brands, making it harder for small breweries to compete, maintain visibility, and survive financially. Some brewery stakeholders predict that this could lead to closures and industry consolidation, with the loss of independent, community-rooted businesses.

On the other hand, breweries note that if policy reforms include strong local mandates—such as guaranteed shelf space or SKU requirements for Nova Scotia-made products, there could be positive impacts. These would include greater brand exposure, improved sales, and a revitalized local supply chain. The ability for local producers to deliver directly to retailers, rather than relying on centralized distribution, is also highlighted, especially for rural breweries seeking a fair chance to reach their local markets.

Conditions or Safeguards to Be Put into Place if a Policy Change is Made

The breweries are nearly unanimous in their call for clear, enforceable safeguards to accompany any decision for retail expansion. Primarily among these is the requirement that a substantial portion of shelf space, often suggested as between 25% and 50%, be reserved for local or Nova Scotia-made beer. This measure is seen as essential to prevent local products from being crowded out by multinational brands and to ensure that consumers continue to have access to homegrown options. Equally important is the continued prohibition of “trade spend” and inducement practices, where large producers use their financial muscle to secure advantageous placement or exclusive promotions in retail settings.

Many breweries also advocate for keeping distribution under the centralized oversight of the NSLC or a neutral third party, with optional direct delivery rights for producers who are able to manage it.

Stakeholders stress the importance of extending NSLC’s current prompt payment terms and transparent reporting practices to new retail channels, which are vital for the cash flow and operational stability of small businesses. Additional safeguards include mandatory responsible-sales training for all retail staff, strict age-verification protocols, and regular compliance audits to ensure regulations are followed and social responsibility remains a priority.

Recommendations on the Future of Alcohol Policy in Nova Scotia

Looking ahead, Nova Scotia’s breweries recommend that if the Province proceeds with alcohol expansion, it adopt a “*local-first*” approach to alcohol policy, placing the interests of local producers and communities at the forefront of any modernization effort. Brewery stakeholders suggest that rather than a wholesale opening of the market to convenience and grocery stores, the Province should prioritize expanding proven models such as Private Wine & Specialty Stores (PWSS) and NSLC Agency Stores, which have demonstrated success in supporting local brands.

These additional retail models already exist, include local product representation and could be expanded to include more locations, including rural areas, to further support Nova Scotia’s craft beer sector. Breweries call for harmonization


and simplification of regulatory and tax reporting to reduce administrative burdens, and urge the introduction of tiered or graduated tax structures that account for the scale of production, thus levelling the playing field for small operations. Throughout the submissions, there is a strong emphasis on maintaining Nova Scotia’s unique identity and supporting responsible consumption. Local craft brewery stakeholders recommend incremental, carefully planned changes, with ongoing consultation and transparent evaluation, to ensure that the Province’s vibrant craft beer industry not only survives but thrives in a modernized retail environment.

Area	Key Points from Craft Breweries
Overall Position	Skeptical of modernization, but open to exploring workable solutions such as protecting local, small, and independent breweries. Strong concern about new policies disproportionately benefiting large multinational brands. Preference for local-first regulations that sustain community economic impact and diversity. Support for local beer in their own local markets versus in all expanded locations.
Impact of Policy Changes	Negative impact anticipated without safeguards: risk of lost shelf space, reduced profits, and potential closures if large players dominate. Positive impact possible if policies guarantee local shelf space, fair access, and allow direct delivery, especially for rural and small producers.
Conditions/ Safeguards	Mandatory local product shelf space (often 25–50%), maintained and regulated ban on trade spend/inducements from large producers, centralized and/or fair distribution (with direct delivery options), responsible sales training for all staff, transparent reporting, and regular policy review.
Future Recommendations	Expand successful local-supporting models (PWSS, Agency Stores), harmonize and simplify regulation/taxation, introduce tiered tax structures for small producers, maintain strong social responsibility standards, and if expanding, pursue phased, evidence-based modernization that prioritizes Nova Scotia producers.

Wineries & Vineyards

Overall Position

Nova Scotia’s vineyards and wineries are unified in their belief that alcohol policy must put local producers first. They advocate for policies that support the unique agricultural and economic contributions of locally grown and produced wine, emphasizing the vital role of the NSLC as the main distribution channel. The sector strongly supports a provincial mandate to significantly increase the market share of Nova Scotia-grown wine, both to support rural economies and to compete with other provinces where local wines enjoy much higher domestic market shares. They are cautious about retail privatization and expansion into grocery or convenience channels, expressing concern that such moves could undermine local products and rural economic benefits unless strong protections are put in place.



Nova Scotia’s vineyards and wineries are unified in their belief that alcohol policy must put local producers first.

Impact if Policy Change is Made

Nova Scotia’s vineyards and wineries believe that, should policy changes be made without adequate safeguards for local products, the impact on Nova Scotia’s wineries could be severe. Experience in other provinces has shown that increased retail access, if not carefully managed, often results in multinational brands dominating shelf space, leading to a decline in sales for local producers and threatening the viability of local-based wineries.

If, however, policy changes are implemented with strong local content mandates and support mechanisms, such as direct-to-retail sales, increased Agency Store requirements, or dedicated local-only outlets, the industry would respond with increased investment in vineyards, processing facilities, and employment, driving further growth in rural communities and amplifying the province’s economic and tourism benefits.

Conditions or Safeguards to be Put into Place

The sector calls for several essential safeguards if retail or consumption policies are to change. Key among these is the requirement that any new channels for alcohol sales must guarantee a significant percentage, or exclusivity, for Nova Scotia-grown and bottled products, using clear and enforceable definitions.

Direct relationships between producers and new retail outlets must be permitted, with local producers retaining their full retail margins. The removal of inequitable

taxes, such as the 5% RSMA, is seen as a necessary step toward levelling the playing field with imported products.

Additional safeguards include clearer, streamlined processes for licensing and off-site permits, government-funded discounts for local wine in the hospitality sector, and reciprocal trade agreements that ensure fair access for Nova Scotia wines in other provinces.

Recommendations on the Future of Alcohol Policy in Nova Scotia

Vineyards and winery stakeholders recommend a local-first approach to alcohol policy reform. This includes setting enforceable targets for local wine market share at the NSLC and in any expanded retail channels, establishing more local-only or association-run wine stores, and ensuring that any expansion of retail access, such as into grocery or convenience stores, is strictly limited to Nova Scotia-made products.

The industry also calls for the removal of the RSMA tax, more support for export and interprovincial trade, and a pause in regulatory changes to allow for careful planning and consultation. Any new policy must embed social responsibility, including responsible consumption standards and youth employment safeguards, to ensure that the benefits to local communities and the provincial economy are realized without unintended social harms.

Area	Key Points from Vineyards & Wineries
Overall Position	Strong support for policies that prioritize and protect Nova Scotia–grown wine. Emphasis on the economic, agricultural, and rural tourism benefits of the local wine sector. Cautious about retail modernization unless robust protections for local products are implemented. Clear preference for local-first regulations that foster sustainable growth, community impact, and fair competition.
Impact of Policy Changes	Risk of significant negative impacts if policies are not designed with strong local safeguards: displacement by multinational brands, loss of shelf space, price wars, and reduced rural employment and investment. Conversely, if policies guarantee local shelf space, direct-to-retail sales, and support for local wine in both retail and hospitality, wineries anticipate increased investment, expansion, job creation, and enhanced regional economic development.
Conditions/ Safeguards	Mandatory minimum or exclusive shelf space for Nova Scotia–grown/bottled wine in any new or expanded retail channels. Restrict new retail opportunities to authentic local products. Permit direct producer-to-retail sales and retention of full retail margins. Remove local-only taxes (like the RSMA). Streamline and modernize event and property licensing. Expand local-only agency or association-run stores. Maintain strict social responsibility standards in all retail environments.
Future Recommendations	Set ambitious, enforceable targets for local wine market share across all retail formats. Expand NSLC and association-run Nova Scotia–only wine stores. Avoid or strictly limit privatized retail channels unless local content is guaranteed and enforceable. Remove unfair taxes on local producers. Strengthen export and interprovincial trade support. Pause further regulatory changes until industry consultation and retail/funding clarity are achieved. Ensure all modernization efforts maintain strong social responsibility and community benefits.

Cider

Overall Position

Nova Scotia's cider producers generally support thoughtful updates to alcohol policy that reflect the evolving needs of local businesses, consumer expectations, and rural economic development, while upholding social responsibility. These organizations are proud of their roots as farm-based or community-focused producers and believe that current regulations too often create unnecessary barriers for small-scale operations.

Cider stakeholders advocate for policies that grant more freedom to sell and serve their products directly to consumers, whether on-site, at farm markets, or through partnerships with other local producers. At the same time, there is caution about the broader liberalization of alcohol sales; for example, some stakeholders express reservations about allowing alcohol in convenience stores due to potential health and social impacts.

There is a consensus among producers that the system should be reformed to empower local producers, enhance rural economies, and improve consumer access to quality, locally crafted products, not to simply open the door to increased alcohol retail at the expense of community wellbeing.

Impact if Policy Change is Made

Nova Scotia's cider producers believe that the impact of policy changes depends heavily on the nature and focus of the policy changes. If reforms are designed with local businesses in mind, such as allowing greater integration of alcohol sales with farm market offerings, simplifying permissions for on-site consumption, or reducing interprovincial trade barriers, the potential benefits are substantial.

These include increased revenue opportunities, greater long-term viability through diversified sales, and the ability to offer more engaging agri-tourism experiences that draw visitors and strengthen community ties. Conversely, if policy changes primarily benefit larger or non-local players, or if they introduce new costs (like higher NSLC markups for small producers), the impact could be negative, putting smaller cideries at a competitive disadvantage and threatening their sustainability.

Producers also point out the inconsistencies in current regulations, where legacy operations enjoy more flexibility than new entrants, creating a sense of unfairness and stifling innovation and growth.

Conditions or Safeguards to Be Put into Place if a Policy Change is Made

Cidery stakeholders are clear that any shift in alcohol policy should be accompanied by practical, enforceable safeguards that balance opportunity with responsibility, in much the same vein as brewery stakeholders. They support clear limits on the types of alcohol that can be sold, favouring products made by the license holder or sourced within established local guidelines, to maintain the focus on Nova Scotia’s agricultural and craft beverage sectors.

Mandatory responsible beverage service training for staff is seen as essential, as is restricting on-site consumption to designated, approved areas to prevent misuse and ensure a safe, controlled environment. Continued oversight from regulatory bodies like the NSLC is welcomed, provided it does not add unnecessary administrative burden. Importantly, cideries ask for ongoing review of policy impacts, with a willingness to adjust rules if negative consequences emerge, emphasizing that regulations should be responsive and not set in stone.

Recommendations on the Future of Alcohol Policy in Nova Scotia

For the future, cider producers recommend a policy direction that explicitly supports local economic development, rural revitalization, and the promotion of Nova Scotia-made products. This includes allowing producers to sell alcohol alongside other farm or locally sourced goods in farm markets, removing the need for separate retail spaces when a manufacturer’s permit is in place, and continuing to allow responsible on-farm consumption in designated areas.

They also advocate for harmonized standards to facilitate interprovincial trade, reducing outdated barriers that hinder small producers from reaching wider Canadian markets. Some recommend a graduated NSLC markup system based on production volume to make it feasible for smaller operations to have their products available in provincial outlets. Across the board, there is a call for incremental, evidence-based policy development that puts local businesses and communities at the heart of regulatory reform, ensuring that Nova Scotia’s alcohol landscape remains both vibrant and socially responsible.

Area	Key Points from Cider Producers
Overall Position	Support thoughtful modernization to empower local producers, strengthen rural businesses, and expand consumer access to Nova Scotia products; cautious about opening sales to convenience stores due to potential social and health impacts.

Area	Key Points from Cider Producers
Impact of Policy Changes	Positive impact if local-focused reforms are enacted (e.g., integrated sales at farm markets, reduced trade barriers); negative impact if changes benefit only large/non-local players or introduce higher costs; current inconsistencies put new entrants at a disadvantage.
Conditions/ Safeguards	Limit alcohol sales to products made by the license holder or sourced locally; require responsible beverage service training; restrict on-site consumption to approved areas; maintain regulatory oversight; regularly review and adjustment of policy as needed.
Future Recommendations	Allow alcohol sales alongside other local products at farm markets; remove requirement for separate alcohol retail spaces; support responsible on-farm consumption; harmonize interprovincial trade standards; consider tiered NSLC markups for small producers; prioritize incremental, evidence-based, local-first policy changes.

Community, Health, and Social Organizations


Overall Position

Community, health, and social organizations in Nova Scotia are united in their strong opposition to the expansion of alcohol sales into additional retail environments, such as convenience stores, gas stations and grocery stores. Their position is founded on overwhelming evidence of alcohol’s contribution to a range of public health and social harms, from cancer and dementia to violence, impaired driving, and chronic disease.

These organizations argue that Nova Scotia already faces a significant burden of alcohol-related harm and that increased access would only serve to worsen these outcomes further. Stakeholders emphasize that alcohol must be regulated as a dangerous substance, not as an ordinary consumer product, and that the current system provides sufficient access for those who choose to consume.

Impact if Policy Change is Made

Health organizations and coalitions anticipate that expanding alcohol sales would undermine ongoing efforts to promote health equity, prevent violence, and support youth wellness. Increased availability is expected to strain already overburdened health, social, and justice systems, diverting limited resources from health promotion to managing preventable harms. Organizations serving Indigenous and marginalized communities warn that greater alcohol access will escalate existing challenges related to domestic and sexual violence, addiction, and impaired driving. For those working in dementia and cancer prevention, expanded alcohol availability is seen as a direct threat to public health, likely to increase disease burden and healthcare costs.



These organizations argue that Nova Scotia already faces a significant burden of alcohol-related harm.

Conditions or Safeguards if Policy Change is Made

If the Province proceeds with expanding alcohol access, these organizations insist on the implementation of strict safeguards as a minimum. They advocate for a comprehensive, independent health and social impact assessment led by public health to be completed before any policy change as well as the creation of a Nova Scotia Alcohol Policy. They call for strong regulation of outlet density, operating hours, and mandatory training for all alcohol vendors to match or exceed the standards of current government-operated stores.

Robust enforcement of age verification, intoxication protocols, and marketing restrictions-especially to protect youth and vulnerable populations, is essential. Organizations further recommend mandatory health and cancer risk messaging at all points of sale, ongoing public education campaigns, and trauma-informed approaches to prevent increased harms in marginalized communities. Support for municipalities in enforcement and a consistent, province-wide approach are also deemed necessary.

Recommendations for the Future of Alcohol Policy

Looking ahead, these community, health, and social organizations urge the Province to place public health and safety at the centre of alcohol policy decisions. They recommend pausing any expansion of alcohol sales or consumption areas until a comprehensive health impact assessment is completed. The development of a province-wide alcohol strategy, independent of industry influence and rooted in evidence and health equity, is strongly advised. Aligning Nova Scotia’s policies with national best practices, such as Canada’s updated Guidance on Alcohol and Health, is considered critical. Shifting oversight from the Department of Finance and Treasury Board to Health and Wellness would ensure that health, not profit, is the guiding principle. Finally, these organizations stress the importance of investing in additional public education around the risks of alcohol, especially regarding cancer and brain health, and strengthening supports for prevention, treatment, and harm reduction for all Nova Scotians.

Area	Key Points from Community, Health and Social Organizations
Overall Position	Strongly opposed to the further privatization or expansion of alcohol sales into convenience/grocery stores or public spaces. Emphasize that alcohol is a major public health risk, and Nova Scotia already faces high rates of alcohol-related harms (cancer, dementia, violence, chronic disease). Argue that current access is sufficient and expansion would worsen health and social outcomes.
Impact of Policy Changes	Anticipate increased strain on health, social, and justice systems; undermining of health equity and violence prevention efforts; greater risk of harm for youth, rural, Indigenous, and marginalized communities; increased triggers for those in recovery; erosion of safe, substance-free public spaces; higher disease burden, more deaths, increased costs, and a need to divert resources to manage preventable harms.
Conditions/ Safeguards	Require a comprehensive, independent health and social impact assessment led by public health before any changes; enforce strict regulation of outlet density, hours, vendor

Area	Key Points from Community, Health and Social Organizations
	<p>training, and marketing; mandatory health/cancer risk messaging at point of sale; ongoing public health education campaigns; robust ID and intoxication enforcement; trauma-informed, equity- and gender-based approaches; province-wide policy consistency and municipal support for enforcement.</p>
<p>Future Recommendations</p>	<p>Pause any expansion of alcohol access or consumption areas until a health impact assessment is complete; develop a comprehensive, province-wide alcohol strategy independent of industry; align with national best practices and Canada's Guidance on Alcohol and Health; shift oversight from the Department Finance and Treasury Board to Health and Wellness; invest in population-wide public education, especially on cancer and brain health; strengthen supports for prevention, treatment, and harm reduction, especially for youth and vulnerable groups.</p>

NSLC Agency Stores

Overall Position

The collective stance of NSLC Agency Stores is generally one of cautious support for targeted, responsible improvements to the current retail system, but strong opposition to broad liberalization or deregulation. While there is acknowledgment that the current system provides widespread consumer access, consistency in pricing, and a degree of support for local producers, there is also a shared concern that opening up alcohol sales to non-specialized outlets such as convenience or grocery stores could undermine local businesses, threaten public safety, and diminish the presence of local products in the marketplace.

The preference is for reforms that create new opportunities specifically for Nova Scotian producers and retailers, rather than a wholesale expansion that could benefit large, out-of-province corporations at the expense of local industry, jobs, and responsible retailing practices.

Impact if Policy Change is Made

Should the policy shift toward wider retail access, local Agency Store stakeholders foresee significant negative impacts. Foremost is the potential loss of sales and viability for small, community-based retailers and producers who have invested heavily in meeting current regulatory standards. There is concern that increased competition from larger retailers or chains would erode their market share, reduce shelf space for Nova Scotian products, and possibly force some businesses to downsize or close altogether. This would not only affect business owners but also employees and the broader rural economy.

Additionally, there is apprehension that weakened controls could lead to increased risks such as underage sales, theft, and irresponsible consumption, as well as a decline in the visibility and promotion of local products.

Conditions or Safeguards if Policy Change is Made

If changes are to be made, strong safeguards are universally recommended. These include maintaining strict regulatory oversight, ensuring robust age-verification procedures, and setting clear rules about store location (e.g., minimum distances from schools and treatment centres).

There is widespread support for limiting the number and density of new retail licences, particularly in smaller or rural communities, to prevent market oversaturation and protect existing local businesses. Another consensus is the need for mechanisms that prioritize or protect shelf space for Nova Scotian products, alongside requirements for staff training and responsible retailing education.

Any new models should be tailored to support local producers and ensure equitable opportunities, rather than simply increasing the total number of retail outlets.

Recommendations for the Future of Alcohol Policy in Nova Scotia

Looking ahead, these stakeholders recommend that any modernization of alcohol policy should prioritize the sustainability and growth of local producers and retailers, while maintaining a strong focus on social responsibility and public health. Ultimately, the goal is a system that balances consumer choice, business sustainability, and public good, rather than one driven solely by convenience or corporate interests.

Area	NSLC Agency Stores
Overall Position	Support targeted, local-centric improvements; oppose broad liberalization; want reforms to benefit local industry and maintain social responsibility.
Impact if Changed	Risk of business closures, job loss, reduced local product visibility, and higher public health risks if liberalized; loss of rural economic benefits.
Conditions/ Safeguards	Strict oversight, robust age verification, limits on new licences, priority for local products, strong retailer training, and community-based input.
Future Recommendations	Prioritize local business sustainability and growth, enable local producer innovation, harmonize regional rules, avoid mass market liberalization, and maintain public health focus.

Appendix A: Email Invitations

Written Submission Email Invitation

Dear [first name],

The Province is considering whether changes are needed to how alcohol, such as beer, wine, spirits or ready-to-drink products are sold and consumed, while maintaining a strong commitment to social responsibility.

The Province wishes to receive input from organizations to help inform government decision-making on this issue. [contact("organization")] is invited to participate in this engagement by preparing a submission on behalf of your organization.

The scope of the consultation is to understand perspectives on three key areas:

- Where alcohol, such as beer, wine, spirits or ready-to-drink products, is sold
- Where alcohol products can be consumed
- Removing trade barriers to allow for interprovincial trade

Your response should address:

1. Your organization's overall position on the topic
2. Impact on your organization if a policy change is made
3. Conditions or safeguards to be put into place if a policy change is made
4. Recommendations on the future of alcohol policy in Nova Scotia

To share your submission, please follow the submission instructions and login information below. The deadline to receive your submission is **Monday, June 30, 2025**.

Submission instructions:

- **Please have your submission prepared before logging in to submit.**
- You will be required to log in using your unique password below.
- Your login information **can only be used once**.
- You are limited to one submission (one file) per organization.
- Acceptable files include PDFs and Microsoft Word Documents (.doc, .docx).
- Files are restricted to 10mb in size.

Your upload may take a few minutes. Please wait until your submission is uploaded before hitting the submit button.

Submission Link: [Click Here](#)

Unique Password: XXXXXX

Crestview Strategy's Research team has been hired by the Province to collect stakeholders' input on the way alcohol is sold and consumed in Nova Scotia.

If you have any questions or encounter an issue, please contact the research team at: research@crestviewstrategy.com

Thank you, and we look forward to your insights.

Session Participation Email Invitation

Dear [name],

The Province is considering whether changes are needed to how alcohol—such as beer, wine, spirits or ready-to-drink products are sold and consumed, while maintaining a strong commitment to social responsibility.

The Province wishes to receive input from Nova Scotian stakeholders to help inform government decision-making on this issue.

[Organization] is invited to participate in a consultation session. First, we would like to invite you to a 30-minute call with the consultation team to plan your session. To share your availability with the project team, please [click here](#).

The Province has hired Crestview Strategy's Research team to collect stakeholders' input on the way alcohol is sold and consumed in Nova Scotia.

Thank you, and we look forward to your insights.

Warm regards,

Appendix B: Stakeholder Session Discussion Guide

[5 Minutes] Introduction

Introducing Infuse PR, Crestview, participants.

Around the room introductions of participants, positions, and brief description of their organization.

Please describe your operations'/organizations'/associations' presence here in Nova Scotia.

Housekeeping:

- Room
- Bathrooms
- Phone
- Tech – if hybrid
- Recording
- Mindful of others.

As you know, the Province is considering whether changes are needed to how alcohol is sold and consumed, while maintaining a strong commitment to social responsibility.

The Province is interested in your input to help inform decision-making on the issue.

Your participation today should reflect [organization/groups] interests and perspectives.

The scope of the consultation is to understand [organization/group's] perspectives on three key areas:

1. Where alcohol—such as beer, wine, spirits or ready-to-drink products are sold
2. Where alcohol products are able to be consumed
3. Removing trade barriers to allow for interprovincial trade

Topic 1: Where alcohol—such as beer, wine, spirits or ready-to-drink products are sold. [30 minutes]

1. What is your organization's overall position on this topic?

2. How will your organization be impacted if a policy change is made?
3. Considering your specific business, how would [Nova Scotians] [customers] be impacted?
 - a. Do you consider this to be a positive or negative change?
 - b. Do you support a change to where products are sold?
4. What is your view on where alcohol products should be made available for sale?
 - a. Which kinds of locations?
 - b. Why, why not?
5. If a policy change is made, how will your business model be impacted?
 - a. What about your customer base?
6. If a policy change is made, what should be considered?
 - a. Safeguards?
 - b. Recommendations?
7. Before moving on, do you have anything more to share on this topic?

Topic 2: Where alcohol products are able to be consumed. [30 minutes]

1. What is your organization's overall position on this topic?
2. How will your organization be impacted if a policy change is made?
 - a. Do you consider this to be a positive or negative change?
 - b. Do you support a change to where products are consumed?
3. If a policy change is made, what should be considered?
 - a. Safeguards?
 - b. Recommendations?
4. Before moving on, do you have anything more to share on this topic?

Topic 3: Removing trade barriers to allow for interprovincial trade. [30 minutes]

1. What is your organization's overall position on this topic?
2. What does interprovincial trade look like for your organization?
3. How will your organization be impacted if a policy change is made?
4. Do you believe opening up the market within Nova Scotia will benefit Nova Scotians? Nova Scotian businesses?
 - a. How?
 - b. Do you consider this to be a positive or negative change?
5. Do you support a change to allow for removing trade barriers?
6. If a policy change is made, what should be considered?
 - a. Safeguards?
 - b. Recommendations?

7. What role do you anticipate the Province playing in supporting local products across Nova Scotia? Across Canada?
8. Before moving on, do you have anything more to share on this topic?

Conclusion [10 minutes]

1. What advice or recommendation do you offer the Province on the future of Nova Scotia's alcohol policy?

Industry Specific:

Grocery/Convenience

1. Does your organization have an interest in selling alcohol within your stores?
2. What barriers or challenges would emerge if alcohol was available for sale within your stores?
3. What training or safeguards would you put in place to prevent underage or irresponsible sales?
4. What are your concerns regarding security, theft, or liability if alcohol retail policy is changed?
5. What would you picture shelf space would look like?
6. Other jurisdictions require local content to be sold at grocery and/or convenience stores. What are your thoughts on requiring 20 to 50% of items on the shelf at grocery/convenience stores to be from local producers?

Producers

7. How would additional alcohol retail access (e.g., in grocery, convenience, gas stations) affect your distribution, sales, or brand visibility?
 - a. Are the impacts the same for small versus large producers?
8. What other types of market access do you favour?
9. What is your perspective on direct-to-consumer sales and interprovincial trade?

Business/Tourism

10. How might expanded alcohol retail access impact tourism, hospitality, or the event-based sectors?
11. What economic benefits or risks do you see for small businesses, restaurants, and hotels?
12. How could changes in alcohol policy impact Nova Scotia's appeal as a tourism destination?

Health

13. What evidence or data is most compelling regarding the risks of increased alcohol availability?
14. What specific groups or populations are most at risk from expanded alcohol retail access?
15. How should public education, prevention, and harm reduction be integrated into any policy change?
16. How would changes to alcohol retail policy affect your organization's work or mission?

Appendix C: Public Opinion Polling Survey

Screener Questions

1. Please share your current age: [Terminate <19 years]
 - a. [Specify age]
 - b. Prefer not to answer [Terminate]

2. Which of the following best describes you?
 - a. Man
 - b. Woman
 - c. Transgender man
 - d. Transgender woman
 - e. Two-spirit (or other Indigenous identity)
 - f. Non-binary
 - g. Gender fluid
 - h. Gender nonconforming
 - i. Genderqueer
 - j. Another gender not specified
 - k. Prefer not to say

3. Please share the first three digits of your postal code. For example, B1P
 [Only allow NS postal codes]
 [Open-ended]

Purchase Behaviour

4. Have you purchased alcohol in Nova Scotia in the last 12 months? *This includes purchasing alcohol in a store (NSLC, or private retailer), at a distillery, winery or brewery, or at a bar or restaurant.*
 - a. Yes
 - b. No

5. How often do you typically purchase alcohol from the following retailers: [Grid Question for Freq]
 - a. NSLC store
 - b. NSLC Agency Store (A smaller NSLC, generally located in small grocery stores or convenience stores in smaller communities across Nova Scotia)
 - c. Private wine or specialty retail store (such as Bishop's Cellar, RockHead, etc.)
 - d. Directly from the producer (A winery, distillery, brewery, etc.)
 - a. Within the past week
 - b. Within the past month
 - c. Within the past two months
 - d. Within the past three to five months

- e. Within the past six to twelve months
 - f. Over twelve months ago
 - e. Never / I do not purchase alcohol
6. Which of the following product(s) do you purchase? *Please select all that apply.*
- a. Beer
 - b. Wine
 - c. Spirits (e.g. whiskey, vodka, rum)
 - d. Cider
 - e. Pre-mixed or ready-to-drink beverages (e.g. hard seltzers, canned cocktails, coolers, hard tea, etc.)
 - f. Other (please specify)
 - g. Not applicable / I do not purchase alcohol
7. Did you purchase alcohol in a retail setting outside of Nova Scotia in the last 12 months?
- a. Yes
 - b. No
8. [If Q7=Yes] In which type of retail setting did you purchase alcohol? *Please select all that apply.*
- a. Provincial or state-operated store (such as LCBO)
 - b. Private alcohol store
 - c. Private wine or specialty store
 - d. Directly from the producer (A winery, distillery, brewery, etc.)
 - e. Convenience store
 - f. Grocery store
 - g. Gas station
 - h. Large retail chain
 - i. Other (please specify)

Access

9. How would you rate your current level of accessibility when purchasing alcohol within your area?
- Accessibility refers to how convenient it is to purchase alcohol in terms of factors such as store location, operating hours, and product availability.*
- a. Very accessible
 - b. Somewhat accessible
 - c. Neutral
 - d. Somewhat inaccessible
 - e. Very inaccessible
 - f. Not applicable / I do not purchase alcohol
10. Would you like to see more retail locations selling alcohol?

- a. Yes
- b. No

11. [If Q10=No] Please share your thoughts and reasons why you do not want to see more retail locations selling alcohol in your area.
Open-ended

Opinions on Expansion

Nova Scotia is considering where alcohol products – such as beer, wine, spirits or ready-to-drink products are made available for purchase.

12. How much do you support or oppose Nova Scotia selling alcohol in convenience stores, grocery stores and gas stations?
- a. Completely support
 - b. Somewhat support
 - c. Neither support nor oppose
 - d. Completely oppose
 - e. Don't know/unsure
13. How likely are you to purchase alcohol from a convenience store, grocery stores or gas stations?
Insert scale of 0-10, where 0 is not at all likely and 10 is extremely likely.
14. [If Q12=Support (AB)] Please share the main reason(s) for supporting alcohol sales in new retail locations.
Open-ended
15. [If Q12=Oppose (D)] Please share the main reason(s) for opposing alcohol sales in new retail locations.
Open-ended
16. Where would you expect to be able to purchase alcohol? *Please select all that apply.*
- a. NSLC store
 - b. NSLC Agency Store
 - c. Private wine or specialty retail store (such as Bishop's Cellar, RockHead, etc.)
 - d. Directly from the producer (From a winery, distillery, brewery, etc.)
 - e. Other Canadian provinces
 - f. Convenience stores
 - g. Grocery stores
 - h. Gas stations
 - i. Large retail chains
 - j. Independent/local businesses
 - k. Other (please specify)

- l. None of the above
 - m. No opinion
17. Please indicate your level of support or opposition for selling alcohol through the following retail locations: [Randomize rows] [Scale - Strongly Support, Support, Neutral, Oppose, Strongly Oppose, Don't know/unsure]
- a. Convenience stores
 - b. Online ordering for in-store pickup
 - c. Home delivery by licensed retailers
 - d. Delivery by third-party services (e.g., Couriers, Uber, etc.)
 - e. Grocery stores
 - f. Large retail chains (e.g., Walmart, Costco, etc.)
 - g. NSLC (Nova Scotia Liquor Commission)/Agency Stores
 - h. Independent/local businesses
 - i. Farmers' market
 - j. Breweries/wineries/distilleries
 - k. Gas stations
18. To what extent do you agree with the following statement:
I believe that alcohol should be available for open consumption in designated public spaces (such as parks, beaches, tourist zones, waterfront boardwalk, etc.), at designated times.
- a. Strongly agree
 - b. Somewhat agree
 - c. Neither agree nor disagree
 - d. Somewhat disagree
 - e. Strongly disagree
 - f. Don't know/unsure
19. [Those who selected "Strongly agree" or "Somewhat agree" in Q18.] Can you please explain why you feel that way, or share any additional thoughts?
Open-ended
20. [Those who selected "Strongly disagree" or "Somewhat disagree" in Q18.] Can you please explain why you feel that way, or share any concerns?
Open-ended
21. To what extent do you agree with the following statement:
If alcohol is sold in additional retail locations, there should be limitations on the types of products available (such as beer, wine, spirits or ready-to-drink products.)
- a. Strongly agree
 - b. Somewhat agree
 - c. Neither agree nor disagree
 - d. Somewhat disagree

- e. Strongly disagree
- f. Don't know/unsure

22. What concerns, if any, do you have with seeing the expansion of retail access points for alcohol?
Open-ended

Social Responsibility

23. How concerned are you about the potential social impacts of increasing alcohol retail access points in Nova Scotia?
- a. Very concerned
 - b. Somewhat concerned
 - c. Neutral
 - d. Somewhat unconcerned
 - e. Very unconcerned
 - f. Don't know/unsure

24. Nova Scotia is considering where alcohol products – such as beer, wine, spirits or ready-to-drink products are made available for purchase.

On a scale of, 0 (not at all concerned) to 5 (very concerned) (for example: selling in convenience, grocery or gas stores) [Randomize]

- a. Public drunkenness and public disturbances
- b. Youth access and underage drinking
- c. Impaired driving / accidents
- d. Injuries due to alcohol / Emergency department visits
- e. Violence associated with drinking alcohol
- f. Mental health problems: such as depression, anxiety, suicidal thoughts
- g. Alcohol addiction
- h. Long-term health harms such as cancer, organ damage, high blood pressure

25. Please rate your level of support for the following options for alcohol access in Nova Scotia 0 (do not support) to 5 (extremely supportive):
- a. No change to where alcohol can be sold
 - b. Allow sales in convenience stores
 - c. Allow sales in grocery stores
 - d. Allow consumption of alcohol in public spaces

Trade / Buy Local

26. Consider the following:

Canadian leaders are looking to remove barriers that make it easier to trade goods, including alcohol, between provinces.

Would you like the option to purchase alcohol directly from producers in other Canadian provinces within Nova Scotia retail locations, such as NSLC and private retail locations?

- a. Yes
- b. No

27. How likely are you to buy local Nova Scotian alcohol products with more Canadian products available which are around the same price?
- a. Very likely
 - b. Somewhat likely
 - c. no impact
 - d. Not likely
 - e. Not at all
 - f. Don't know/unsure

Demographics

28. What is your total annual household income before taxes?
- a. Less than \$30,000
 - b. \$30,000 to \$59,999
 - c. \$60,000 to \$89,999
 - d. \$90,000 to \$109,999
 - e. \$110,000 to \$149,999
 - f. \$150,000 to \$199,999
 - g. \$200,000 or more
 - h. Don't know/unsure
 - i. I prefer not to say
29. What is the highest level of education that you have completed?
- a. Some high school
 - b. Graduated from high school
 - c. Some post-secondary institutions
 - d. Graduated post-secondary institution – diploma
 - e. Graduated post-secondary institution – bachelor's degree
 - f. Post-graduate degree
 - g. I prefer not to say
30. What is your current employment status? Are you currently...
- a. Employed
 - b. Self-employed
 - c. Retired
 - d. Unemployed
 - e. Student
 - f. Caring for family
 - g. Other

31. Which of the following best describes your racial or ethnic background?
- a. Middle Eastern
 - b. Black or African Canadian
 - c. East Asian (e.g., China, Hong Kong, Japan, South Korea, etc.)
 - d. South Asian (e.g., India, Pakistan, Sri Lanka, etc.)
 - e. West Asian (e.g., Iran, Afghanistan, etc.)
 - f. Southeast Asian (e.g., Philippines, Thailand, Vietnam, etc.)
 - g. Indigenous
 - h. Latin American
 - i. White/Caucasian
 - j. Other
 - k. Prefer not to answer



