

# SENIOR MOBILITY AND ACCESSIBILITY PROJECT

Executive Summary | Ontario CMA Opportunity Index

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## The Problem

Ontario has 2 million seniors aged 65+, and assistive technology use is growing at 32% over five years. The supply exists. The problem is it is in the wrong places. Ottawa has 400,000 senior users and ranks among the worst in the province for device access. Barrie, a fraction of its size, leads the province. The market is not saturated. It is misallocated.

## What We Built

A CMA-level Opportunity Index for Ontario built from three independent data sources:

- Supply: Health Canada MDALL device licence registry
- Access: Ontario Assistive Devices Program vendor registry
- Demand: Statistics Canada senior mobility and disability surveys

**32%**

Growth in usage (5 yrs)

*Demand rising faster than supply*

**0.3**

Devices/10K seniors (Ottawa)

*Province's worst-served large city*

**3.3**

Devices/10K seniors (Barrie)

*Province leader -- replicable model*

**63.5%**

Seniors not yet using devices

*Unaddressed market opportunity*

## KEY FINDINGS

- Top 3 CMAs (Toronto, Ottawa, St. Catharines-Niagara) account for 77% of all senior users
- Ottawa has 390K users but only 0.1 vendors per 10K seniors, the lowest density in Ontario
- 85.8% of devices are moderate risk (Class II); 14.2% are high-risk (Class III/IV)
- Senior population grew by 114,000+ across Ontario CMAs in just four years (2021-2025)
- Supply growth has slowed to 0.8% YoY in 2026, while demand continues to accelerate
- Access deficit ( $r = 0.57$ ) is the primary driver of opportunity, not demand

## OPPORTUNITY RANKINGS (0-100)

CMA	Score /100
Belleville / Quinte West	55
Thunder Bay	55
Guelph	55
Brantford	55
Peterborough	55
Barrie	55
Kingston	55
Oshawa	53
Windsor	52
Ottawa	45

## Healthcare Vendors

Identify where to expand, recruit vendors, and allocate inventory ahead of demand growth.

## Insurers and Payers

Anticipate claims pressure, assess network gaps, and model unmet need as deferred cost.

## Government and Policy

Direct ADP funding, apply equity lens to budgets, and evaluate program effectiveness over time.

## NEXT: National Expansion

The framework is built to scale. Ontario is Phase 1. Phase 2 targets British Columbia and Quebec. Phase 3 covers all Canadian provinces, enabling a national Opportunity Index that lets any stakeholder find their highest-value market in minutes.

## Want to see the full dashboard?

Reach out to Vaibhav Nangia for a live walkthrough of the Power BI report and dataset.