

REPORT

National Accessibility Study 2024

Rick Hansen Foundation





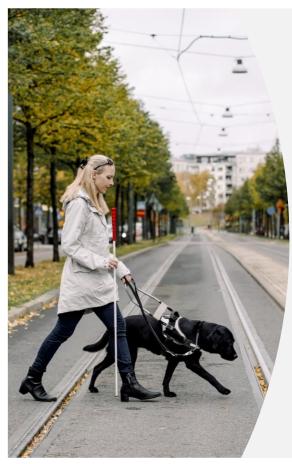


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Background & Objectives



Background & Objectives

In early 2024, Leger was commissioned to administer the 2024 Rick Hansen Foundation National Accessibility Study. This survey was conducted on a representative sample of Canadian adults with the intention of collecting various data related to disability and accessibility in Canada. The objectives of this survey include:

- Measuring the knowledge level of Canadians regarding those living with disabilities and their lived experiences;
- Understanding the lived experiences and accessibility challenges faced by Canadians; particularly those with disabilities and those aged 55+;
- Measuring and understanding Canadian attitudes towards and perception of disability and accessibility;
- Gauging Canadian attitudes towards the need for accessible private, public, and residential buildings/spaces;
- Exploring Canadians' priorities for improved accessibility and how they believe corporations, government, and developers should be involved;
- Understanding perceptions towards disability being part of workplace DEI and notions of accessibility in the workplace.



Methodology



Methodology











Method

Online survey of Canadian adults aged 18+ via Leger's LEO Panel (n=1,503).



February 9 to February 26, 2024.

Margin of error

As a non-random internet survey, a margin of error is not reported (margin of error accounts for sampling error). Had these data been collected using a probability sample, for comparison purposes, a probability sample of similar size to the sample (n=1,503) yields a margin of error no greater than ±2.53%, (19 times out of 20).

Weighting

Panel results were weighted according to age, gender, and province to ensure a geographically representative sample of the Canadian population.

Significant differences

Notable significant differences between various demographics groups are noted in the written section on the right side of each slide.







Disability Prevalence

- Almost two-thirds (64%) of Canadians have a disability or have a family member they live with or
 take care of with a disability. This means accessibility for persons with disabilities affects many
 Canadians.
- There are Canadians living with a disability who may not identify as a person with a disability.
 - One-in-seven (14%) Canadians self-identify as a person with a disability. However, one-third (35%) say they have a condition that would be considered a disability (when prompted with a list of conditions).
- One-quarter (26%) of Canadians have a physical disability (reported having a condition that would be considered a disability).
 - Mobility conditions (15%) are the most reported disability, followed by hearing disabilities (11%) and mental health conditions (10%).
- Many Canadians live with or take care of a family member with a disability.
 - Just under a third (31%) of Canadians live with or take care of a family member with a disability. This is most commonly a spouse, parent, or child.



Attitudes towards Disabilities in Canada

- Canadians highly value inclusivity and accessibility for persons with disabilities.
 - Almost all Canadians (91% or more) agree that:
 - It is important that persons with disabilities are able to actively participate in the community (96%)
 - Accessibility is a basic human right (93%)
 - Buildings and spaces should be more accessible (93%)
 - Taxpayer-funded building projects should be held to the highest accessibility standards (91%)
- Canadians feel the government needs to urgently do more for persons with disabilities.
 - While most Canadians (80%) agree there is an urgent need to improve accessibility for people with disabilities, only half (51%) believe the government provides a good level of support. This suggests Canadians feel there needs to be more done, and urgently, for people with disabilities.
 - Most Canadians believe that ensuring there is accessible housing for Canadians with disabilities (87%) and ensuring that building and spaces are accessible for Canadians with disabilities (86%) are urgent priorities.



Built Environment Accessibility

- Canadians agree there needs to be improved accessibility in built environments.
 - Three quarters (74%) of Canadians believe Canada's goal should be universal accessibility for everyone in public spaces.
 - Over half (57%) of Canadians rate the level of accessibility of the buildings and places where they live, work, learn as *fair or poor*.
- A minority (14%) of Canadians feel the accessibility of buildings and spaces in their city have gotten better at a *satisfactory* rate in the past three years. This suggests Canadians may want the accessibility of buildings and spaces to improve at a faster rate.
 - Most feel they have gotten better at a *slower*-than-satisfactory rate (30%) or have not changed (36%).



Mobility Barriers and Mental Health

- Mobility barriers are most often experienced in residential buildings (other than a persons' home), festivals/special events, and public washrooms.
 - Among those who experience mobility barriers <u>outside</u> their home, absence of handrails or grab bars (42%), lack of ramps or sloped pathways (38%), no automatic doors at front entrances and inside buildings (36%), and insufficient accessible parking (36%) are the most commonly experienced barriers.
- Accessibility and associated mental health challenges are not unique to Canadians with disabilities, as those without disabilities experience them as well.
 - Approximately half of all Canadians have experienced anxiety about getting around in public places (54%), have felt social isolated (51%), have avoided going to certain less accessible places (50%), and have experienced a lack of understanding from others about their physical needs/situation (50%).



Improving Accessibility

- Canadians believe both the private and public sector are responsible for improving accessibility in buildings and spaces.
 - This includes designers/ developers/building owners and managers (96% have a responsibility), and the provincial (96%), municipal (96%) and federal government (94%).
- Across Canada, people believe that getting input from those with lived experiences (32%) and greater enforcement of accessibility standards (32%) are the top priories for improving accessibility.
 - Canadians believe the top reasons for poor accessibility in buildings and spaces are the age of buildings and the difficulty of renovating them, high cost, lack of regulation enforcement, and accessibility not being a priority for designers/builders.
 - Those with a disability are more likely to believe that poor accessibility is a result of a lack
 of regulation enforcement.



Disabilities in the Workplace and DEI

- There is a lack of understanding about persons with disabilities in the workplace, suggesting
 Canadians need education on the topic. Perceived barriers in the workplace are related to a lack of
 understanding of the needs and abilities of those with disabilities.
 - Among those with a disability or who have a person with a disability in their household, it is believed the top barriers/challenges with employment faced by those with disabilities are a lack of understanding of the needs of persons with disabilities (21%), a lack of understanding/belief in the potential of persons with disabilities (19%), and preconceived attitudes and perceptions about the potential of people with disabilities (19%).
- Accessibility is a significant limiting factor for persons with disabilities participating in the workforce.
 - Among those who have a disability and are employed, two-in-five (43%) agree they could work more hours if their workplace was more accessible.
 - Among those with physical disabilities who are employed, unsuitable workstation design, noisy environments, a lack of automatic doors at front entrances/inside buildings, and an absence of handrails or grab bars are the top physical barriers experienced at work.
- Most Canadians (79%) agree that disability should be included in workplace DEI policies.

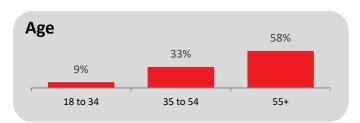
Detailed Results

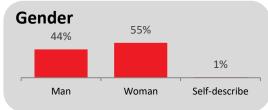


Disability
Statistics
& Profile



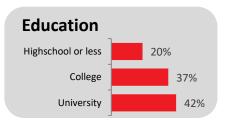
Profile Of Canadians With Disabilities

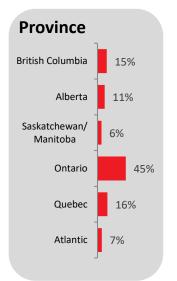


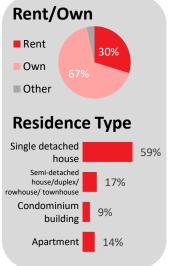


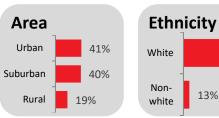
85%

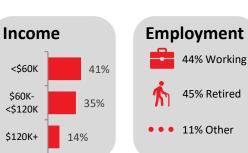
13%

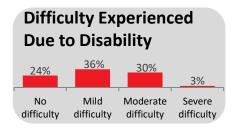


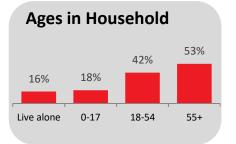






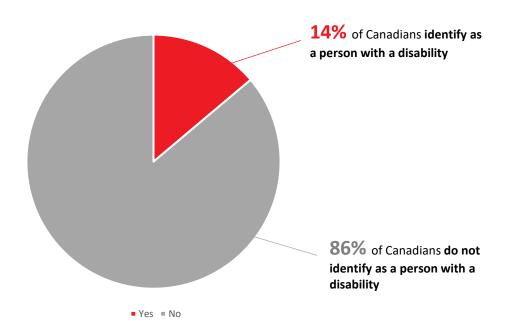












Fourteen percent (14%) of Canadians identify as a person with a disability.

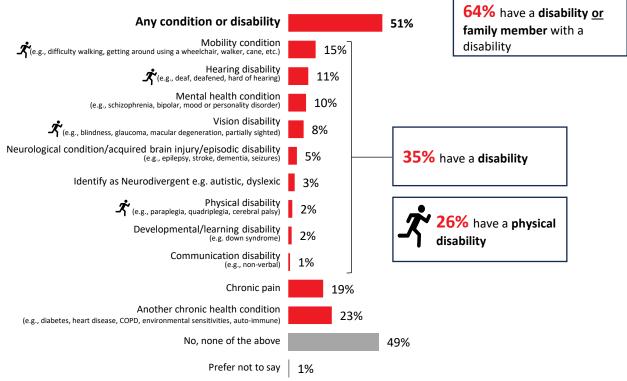
Those more likely to identify as a person with a disability reside in Ontario (18%), are not working (19%), make under \$60k (21%), and live in an apartment (23%).

Those less likely to identify as a person with a disability reside in Quebec (5%), are working (9%), and make \$120k or more (8%).





% Personally Have



When prompted with various disabilities and health conditions, more than a third (35%) of Canadians report having a disability, while a quarter (26%) report having a physical disability.

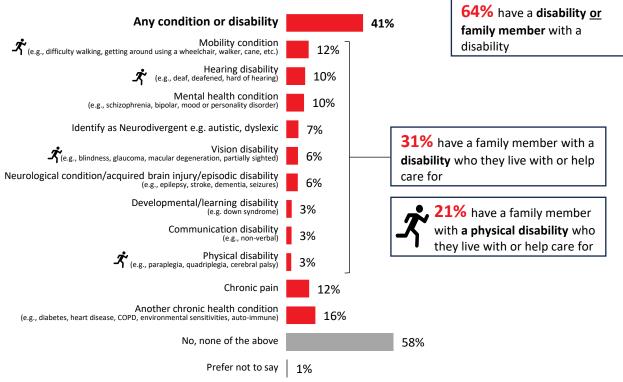
Mobility conditions (15%) are most common, followed by hearing disabilities (11%) and mental health conditions (10%).

Those more likely to report having any disability reside in Ontario (40%), are not working (39%) and make under \$60k (44%).



Family Member Disability & Chronic Health Condition Prevalence

% Family Member Has



When prompted with various disabilities and health conditions, just less than a third (31%) of Canadians have a family member they live with or help care for who has a disability, with 21% having a physical disability.

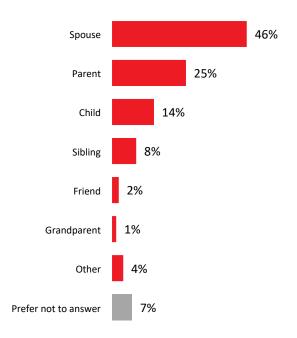
Mobility conditions (12%) are most common among family, followed by hearing disabilities (10%) and mental health conditions (10%).

Those who are 55+ (24%) are more likely to report they live with or help care for a family member with a physical disability.





% Selected



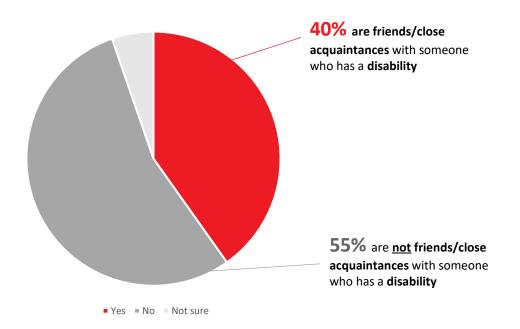
Among those who live with or care for a family member with a disability, it is most commonly a spouse (46%), parent (25%) or child (14%).

Those living with/taking care of a spouse are more likely to be aged 55+ (59%), not working (59%), and white (48%).

Those living with/taking care of a parent are more likely to be aged 18-34 (45%) or 35-54 (40%), reside in Ontario (33%), working (39%), university educated (30%), making \$120k+ income (39%), and non-white (46%).







Four-in-ten (40%) Canadians are friends/close acquaintances with someone who has a disability.

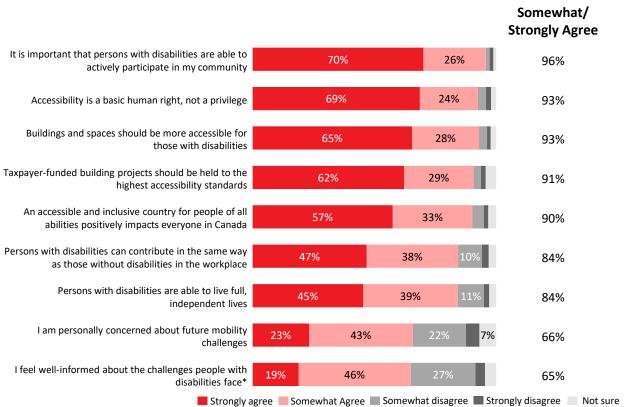
Those more likely to report being friends/close acquaintances with someone who has a disability are women (47%), those with a university education (44%), and those with a disability themselves (52%).

Those who are more likely to report not being friends/close acquaintances with someone who has a disability are men (61%), Quebecers (63%), those with a high school education or less (63%), and those who are non-white (62%)









Canadians highly value inclusivity and accessibility for persons with disabilities, with most agreeing that it is important that persons with disabilities are able to actively participate in the community (96%) and that accessibility is a basic human right (93%). Most Canadians also agree that buildings and spaces should be more accessible for those with disabilities (93%) and that taxpayer-funded building projects should be held to the highest accessibility standards (91%).

Two-thirds (65%) of Canadians agree they are informed about the challenges people with disabilities face, indicating a potential area for further education.

Q10. How much do you agree or disagree with each of the following statements?

Values 5% or less not labeled

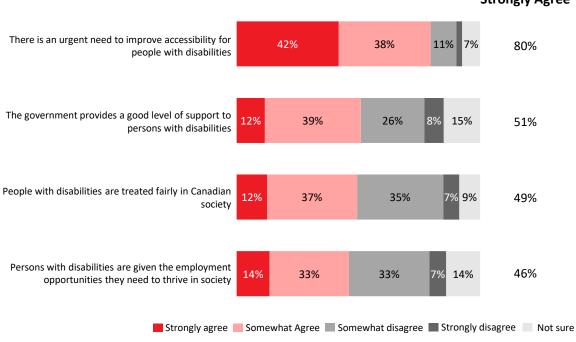
Base: All respondents (n=1,503)

^{*}Base: All respondents excluding those who have a disability (n=1,005)

Additional Perceptions Towards Disabilities in Canada







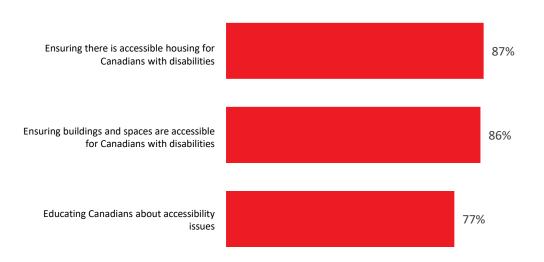
While most Canadians (80%) agree there is an urgent need to improve accessibility for people with disabilities, only half (51%) believe the government provides them with a good level of support. This suggests Canadians feel there needs to be more done, and urgently, for people with disabilities.

Those who are more likely to disagree that people with disabilities are treated fairly in Canadian society are women (46%), those who are white (43%), and those who are friends with a person with a disability (49%).

Urgency of Addressing Accessibility Issues



% Very/Somewhat Urgent



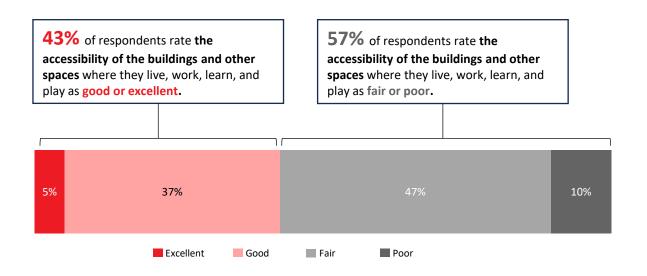
Canadians believe there is an urgent need to improve accessibility for those with disabilities. Most Canadians believe that ensuring there is accessible housing for Canadians with disabilities (87%) and ensuring that building and spaces are accessible for Canadians with disabilities (86%) are **urgent** priorities. Similarly, nearly eightin-ten (77%) believe that educating Canadians about accessibility issues is an urgent priority.

Women are more likely to report that all three of the listed priorities are urgent (93%, 92%, 84%, respectively).



Accessibility in Buildings & Other Spaces





Nearly three-in-five Canadians (57%) rate the level of accessibility of the buildings and places where they live, work, learn and play to be fair or poor, representing an area for potential improvement.

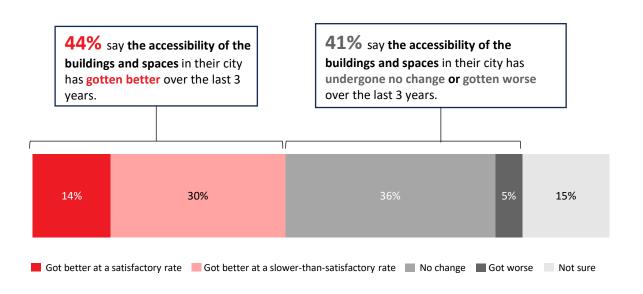
Just over two-in-five (43%)
Canadians rate the level of
accessibility of the buildings and
places where they live, work, learn
and play to be good or excellent.

Those more likely to rate the state of accessibility as good or excellent are aged 55+ (46%).

Those who are friends with a person with a disability (13%) are more likely to rate accessibility as poor.

Satisfaction with Rate of Accessibility Improvements





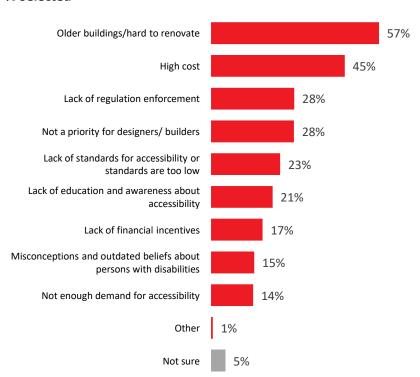
A minority (14%) of Canadians feel the accessibility of buildings and spaces in their city have gotten better at a *satisfactory* rate in the past three years. Most feel they have gotten better at a slower-than-satisfactory rate (30%) or have not changed (36%).

Those who are more likely to indicate they believe accessibility has gotten better in their city over the past 3 years include urbanites (48%), those with a university education (48%), those who live with/care for a parent (51%), and those who are friends with a person with a disability (49%)

Reasons for Poor Accessibility in Buildings and Spaces



% Selected



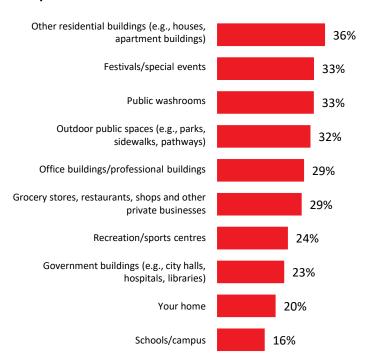
Canadians believe that the age of buildings and the difficulty of renovating them (57%) is the top reason for buildings and spaces having poor accessibility. High cost (45%), lack of regulation enforcement (28%), and accessibility not being a priority for designers/builders (28%) are also commonly cited reasons.

Those with a physical disability (35%) are more likely to believe that poor accessibility is a result of a lack of regulation enforcement.

Locations Where Mobility Barriers Are Experienced



% Experience Barriers Sometimes Or More Often



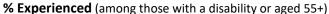
Residential buildings other than one's home (36%) are the most common location where mobility barriers are experienced, followed by festivals/special events (33%) and public washrooms (33%).

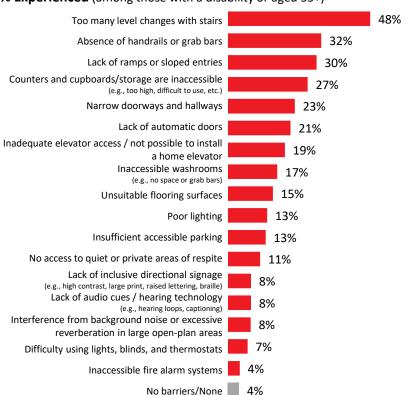
Those with any disability are more likely to experience mobility barriers in all locations, while those with a physical disability are more likely to experience them in all locations aside from schools/campus.

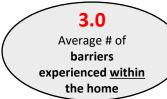
Those making under \$60k are more likely to experience mobility barriers at festivals/special events (39%), public washrooms (38%), outdoor public spaces (38%) office/professional buildings (36%) and private businesses (34%).











Among those who experience mobility barriers in their home, too many level changes with stairs (48%) is the most common barrier, followed by the absence of handrails or grab bars (32%) and a lack of ramps or sloped entries (30%).

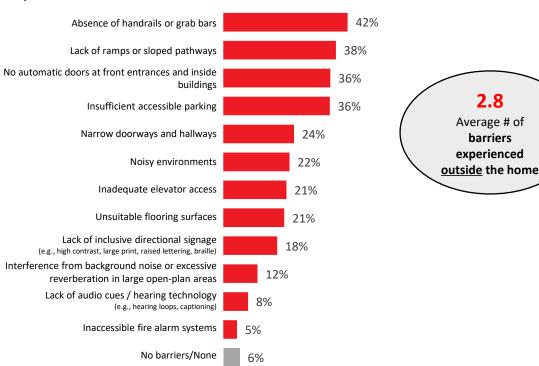
Those with a physical disability are more likely to cite too many level changes with stairs (55%).

Those residing in apartments are more likely to report experiencing inaccessible washrooms (32%).





% Experienced



Among those who experience mobility barriers <u>outside</u> their home, the absence of handrails or grab bars (42%), a lack of ramps or sloped pathways (38%), no automatic doors at front entrances and inside buildings (36%), and insufficient accessible parking (36%) are the most commonly experienced barriers.

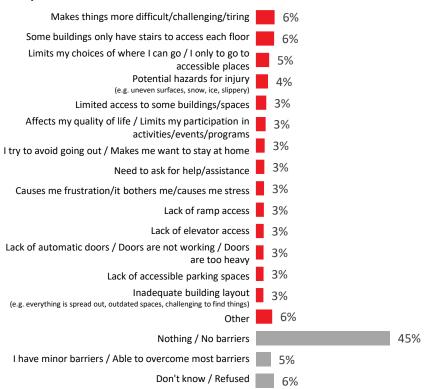
Those with a physical disability are more likely to experience a lack of ramps or sloped pathways (47%), insufficient accessible parking (48%), and inadequate elevator access (28%).

Base: Those with a disability or aged 55+ who experience mobility barriers outside their home (n=616) Q16. Specifically, what barrier(s) do you experience in buildings outside of your home? Responses receiving 1% or less not shown





% Experienced*



Nearly half (45%) of those who have experienced mobility barriers report no impact on their quality of life and societal participation; though this figure is lower among those with any disability (32%), those who have a person with a disability in their household (34%), and those with physical disabilities (30%).

Among those who experience mobility barriers outside their home, the impacts vary, such as making things more difficult/challenging /tiring (6%), limiting one's ability to move around in buildings that only have stairs to access each floor (6%), and limiting one's choices of where they can go/limiting them to accessible places (5%).

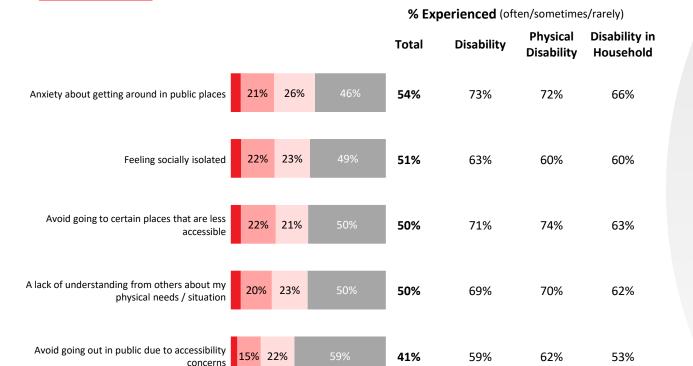
Base: Those with a disability or aged 55+ who experience mobility barriers outside their home (n=906)

Q17. Thinking about your own experience, how do barriers that limit your ability to access buildings and spaces impact your quality of life and participation in society? Responses receiving 2% or less not shown

^{*}Open-end question







Sometimes

Rarely

Never

Approximately half of Canadians have experienced anxiety about getting around in public places (54%), felt socially isolated (51%), avoided going to certain less accessible places (50%), and experienced a lack of understanding from others about their physical needs/situation (50%). This suggests that accessibility and mental health impacts are not unique to Canadians with disabilities, as those without disabilities experience them as well.

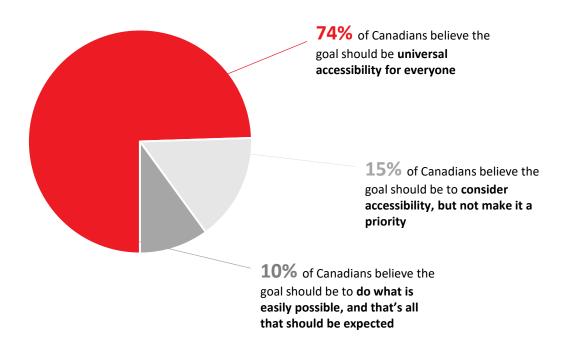
Those with any disability or a physical disability, as well as those who live with a person with disabilities, are significantly more likely to report experiencing all the listed mental health impacts.

Often



Effort Level for Accessibility in Public Spaces





Three quarters (74%) of Canadians believe Canada's goal should be **universal accessibility** for everyone in public spaces.

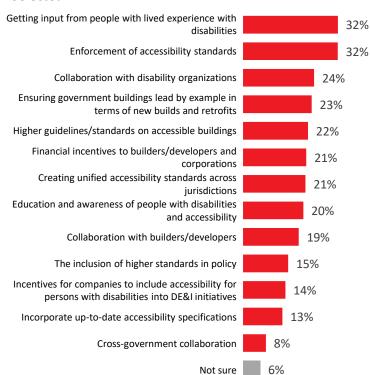
Those who are more likely to advocate for universal accessibility are:

- Women (82%),
- Aged 55+ (80%),
- Not working (79%),
- Have a high school education or less (82%),
- Make less than \$60k (81%),
- White (77%),
- Live with an adult aged 55+ (77%), and,
- Those with a physical disability (80%).

Top Priorities for Improving Accessibility



% Selected



Base: All respondents (n=1,503)

Q20. What do you think should be the top 3 priorities for government to improve accessibility and accessibility policy? Responses receiving less than 1% not shown

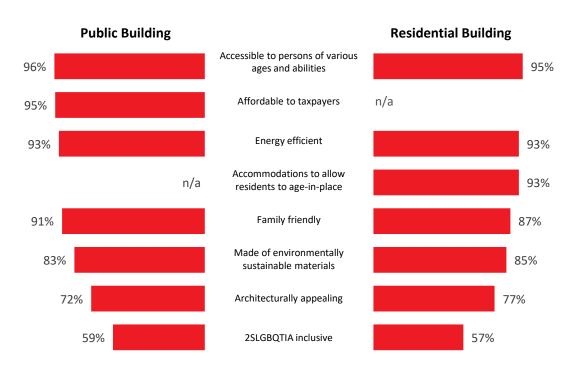
Across Canada, people believe that getting input from those with lived experiences and greater enforcement of accessibility standards are the top priories for improving accessibility.

Those with a disability place even higher importance on these (37% and 38%, respectively).

Priorities for New Construction



% Very / Somewhat Important

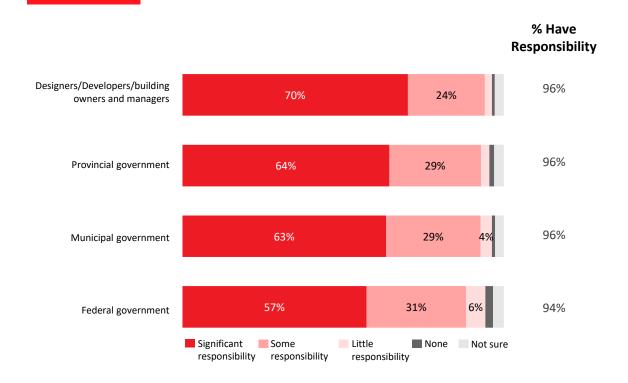


The priorities for public and residential buildings are aligned in their perceived importance. It is important that buildings are accessible to all ages, energy efficient, and family friendly.

For public buildings, being affordable to taxpayers is of high importance, while aging in-place accommodations are of high importance for residential buildings.







Canadians believe both the private and public sector are responsible for improving accessibility in buildings and spaces.

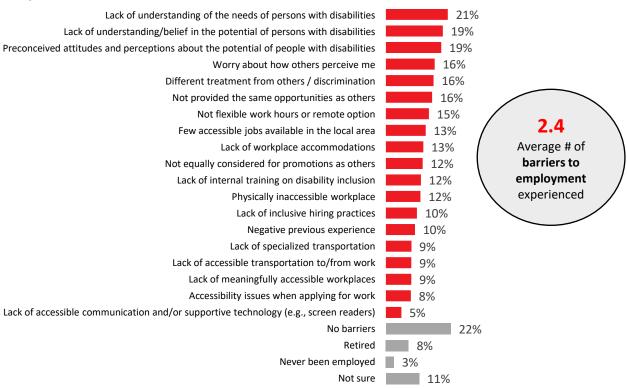
Those with physical disabilities are more likely (75%) to place significant responsibility on designers/developers/building owners and managers.

Leger Workplace & DEI





% Experienced



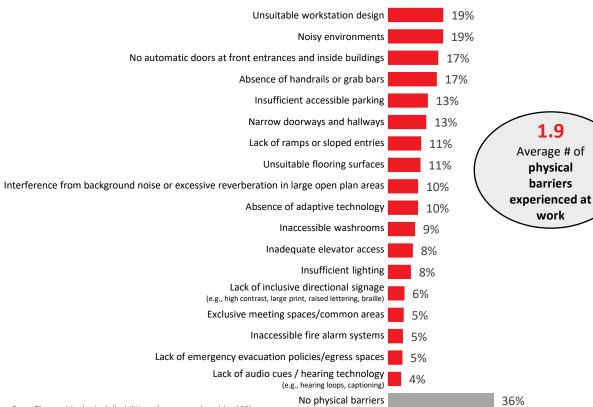
Those with a disability or family member with a disability believe a lack of understanding about the needs and potential of persons with disabilities, as well as preconceived notions about their abilities are the top barriers to employment.

Those with any disability (28%) or a physical disability (29%) are more likely to report no barriers/challenges with employment, while those with persons with disabilities in their household are less likely (18%).

Physical Barriers Faced at Work



% Experienced



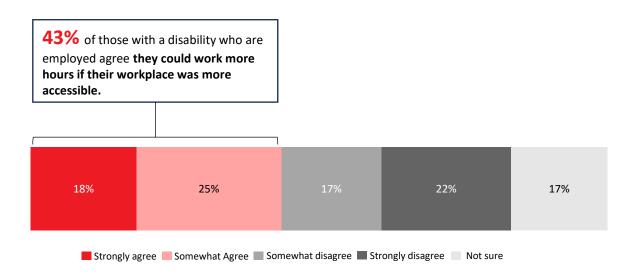
Among those with physical disabilities who are employed, unsuitable workstation design (19%), noisy environments (19%), a lack of automatic doors at front entrances/inside buildings (17%), and an absence of handrails or grab bars (17%) are the top physical barriers experienced at work.

Those aged 18-34 are less likely (13%*) to report experiencing no physical barriers at work. Those aged 35-54 are more likely (26%) to report unsuitable workstation design.

Base: Those with physical disabilities who are employed (n=138) Q25. What are the specific physical barriers you experienced at work? *Take caution interpreting results with small sample size (n=36)

Impact of Accessibility on Hours Worked



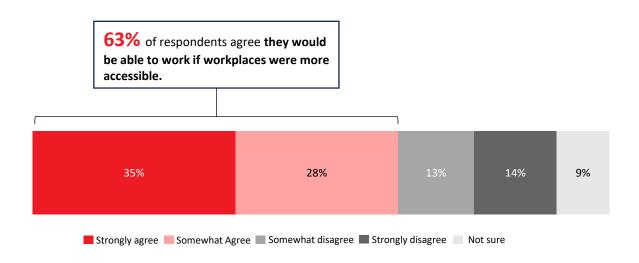


Accessibility is a significant limiting factor for persons with disabilities participating in the workforce. Among those who have a disability and are employed, two-in-five (43%) agree that they could work more hours if their workplace was more accessible.

Those more likely to agree that they could work more hours if their workplace was more accessible are aged 18-34 (55%), reside in Ontario (52%), and are non-white (57%).





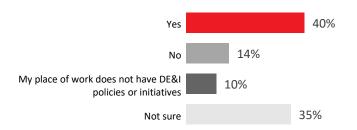


Among those with a disability who are not working (caution small sample size), nearly two-thirds (63%) agree that they would be able to work if workplaces were more accessible.

Disability & DEI Policies in the Workplace

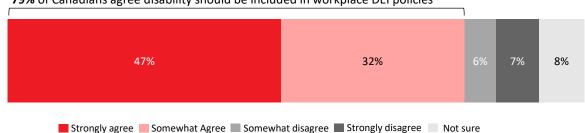


Is Disability Part Of The DEI Policies Or Initiatives At Your Workplace?



Agreement That Disability Should Be Included In Workplace DEI Policies*

79% of Canadians agree disability should be included in workplace DEI policies



Base: Those who are working (n=854)

* Base: All respondents (n=1,503)

Four-in-ten (40%) working Canadians report that disability is part of the DEI policies or initiatives at their workplace, while a third (35%) are not sure whether it is included.

However, most Canadians agree that it should be included (79%), with 47% agreeing strongly.





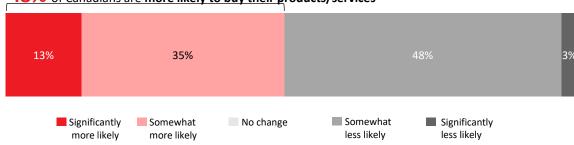
Recommend their products/services to others

52% of Canadians are more likely to recommend their products/services



Buy their products/services

48% of Canadians are more likely to buy their products/services



Base: All respondents (n=1.503)

Q29. If a company/business prioritized accessibility for persons with disabilities, how would this impact your likelihood to...? Figures 1% or less not labeled

Approximately half of Canadians are more likely to recommend (52%) or buy (48%) products/services from a company/business that prioritizes accessibility for persons with disabilities.

Those who are more likely to recommend or buy products/ services from a business that prioritizes accessibility are:

- Women (62% recommend, 58% buy)
- Aged 55+ (55%, 52%)
- Not working (57%, 54%)
- University educated(56%, 52%)
- Make <\$60k (58%, 53%)
- Have any disability (58%, 57%)
- Have a physical disability (60%, 58%)
- Have someone with a disability in their household (58%, 57%).

Respondent Profile



Respondent Profile

	n = 1,503
Gender	
Man	48%
Woman	51%
Self-describe:	<1%
Age	
18-34	10%
35-54	33%
55+	57%
Province	
British Columbia	14%
Alberta	11%
Saskatchewan/Manitoba	6%
Ontario	39%
Quebec	23%
Atlantic	7%
Employment	
Working	50%
Working full time	37%
Working part time	7%
Self-employed / freelance work	6%
Not working	51%
Self-employed / freelance work	6%
Student	3%
Taking care of home/family	2%
Unemployed but looking for a job	2%
Unemployed and not looking for a job	<1%
Unable to work due to disability	2%
Retired	42%
I prefer not to answer	1%



Respondent Profile

	n = 1,503
Education	
High school or less	18%
College	35%
University	47%
Area	
Urban	42%
Suburban	37%
Rural	21%
I don't know/prefer not to answer	<1%
Age Of Others In Household	
0-17	18%
18-54	46%
55+	51%
Live alone	13%
Ethnicity	
White	85%
Non-white	14%
Prefer not to answer	1%
Residence Type	
Single detached house	61%
Semi-detached house/duplex/rowhouse/townhouse	16%
Condominium building	10%
Apartment	13%
Other	1%
Own/Rent Home	
I rent	32%
lown	65%
Other	3%
Income	
<\$60K	32%
\$60K-<\$120K	35%
\$120K+	22%



Our Services

- Leger
 Marketing research and polling
- Customer Experience (CX)
 Strategic and operational customer experience consulting services
- Leger Analytics (LEA)
 Data modelling and analysis
- Leger Opinion (LEO)
 Panel management
- Leger Communities
 Online community management
- Leger Digital
 Digital strategy and user experience
- International Research
 Worldwide Independent Network (WIN)

600 EMPLOYEES

185 CONSULTANTS





8 OFFICES

MONTREAL | QUEBEC CITY | TORONTO | WINNIPEG EDMONTON | CALGARY | VANCOUVER | NEW YORK



Our Commitments to Quality



Leger is a member of the <u>Canadian Research Insights Council (CRIC)</u>, the industry association for the market/survey/insights research industry.



Leger is a member of <u>ESOMAR</u> (European Society for Opinion and Market Research), the global association of opinion polls and marketing research professionals. As such, Leger is committed to applying the <u>international ICC/ESOMAR</u> code of Market, Opinion and Social Research and Data Analytics.



Leger is also a member of the <u>Insights Association</u>, the American Association of Marketing Research Analytics.

