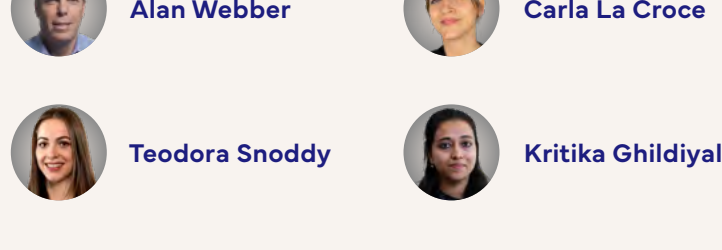




Quantifying the Impact of the Digital Labour Economy in Canada

Exploring Digital Labour Software and Services

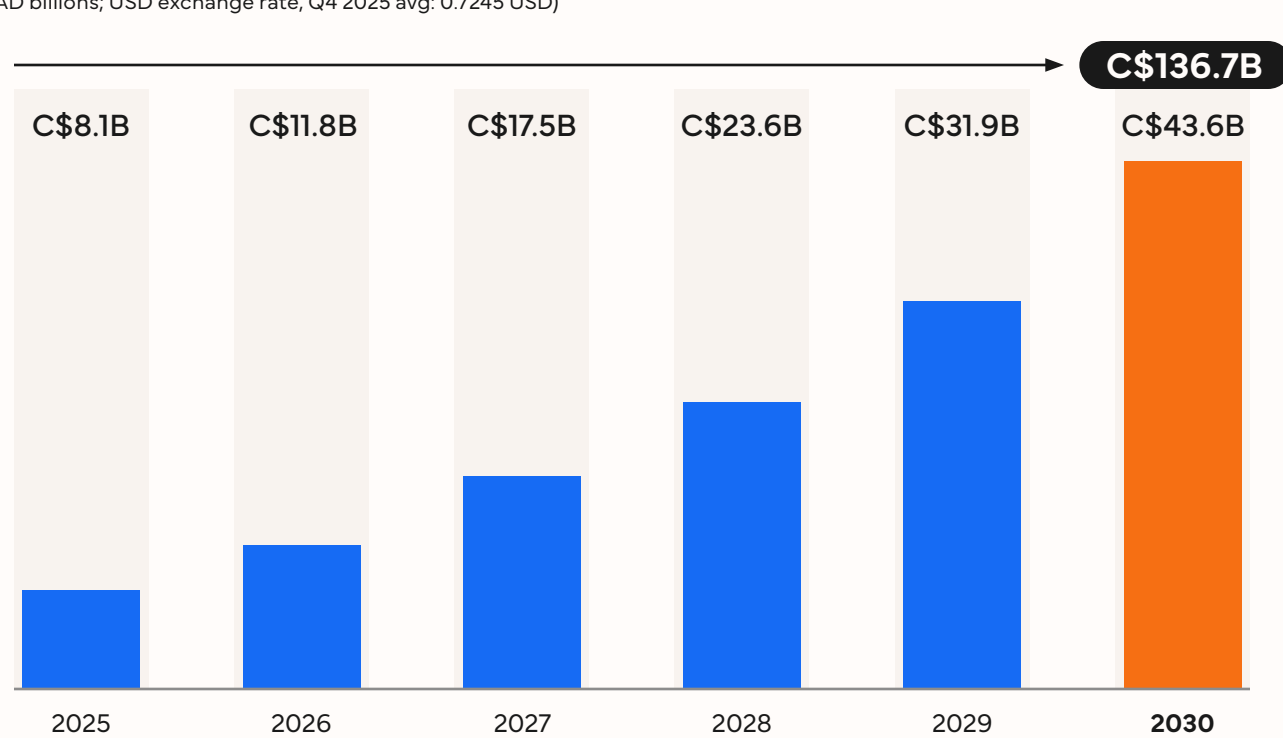


AI spending forecast supporting digital labour

In Canada, cumulative spend in AI technologies supporting digital labour will reach **C\$136.8 billion with CAGR of 40% by 2030**. Globally, it will reach C\$4.5 trillion.

Cumulative spend on AI supporting digital labour in Canada 2025–2030

(CAD billions; USD exchange rate, Q4 2025 avg: 0.7245 USD)



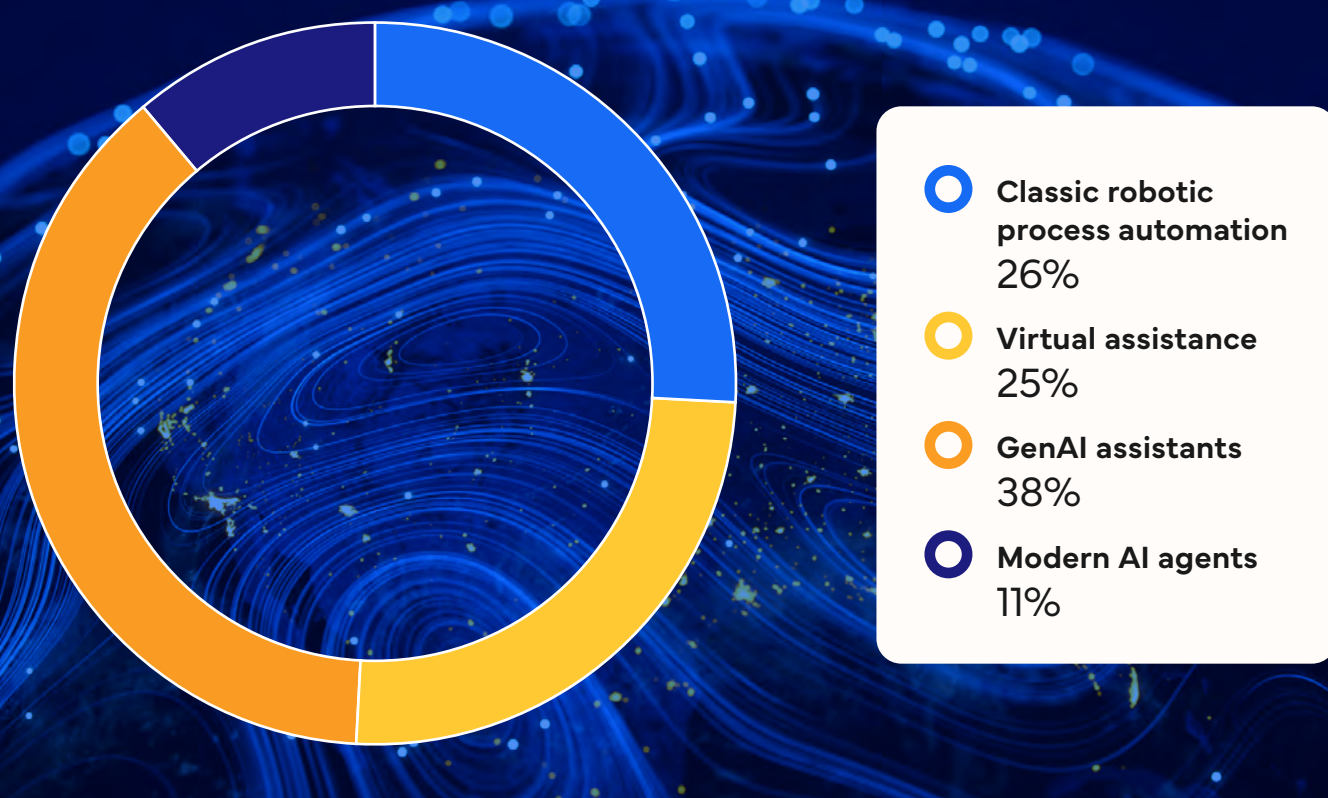
Source: IDC custom derivative of IDC's AI and Generative AI Spending Guide, 2025

Use of AI tools by the Canadian workforce

Workers are transitioning from legacy to emerging AI tools.

What percentage of AI tools you use fall into the following categories?

(Mean responses)



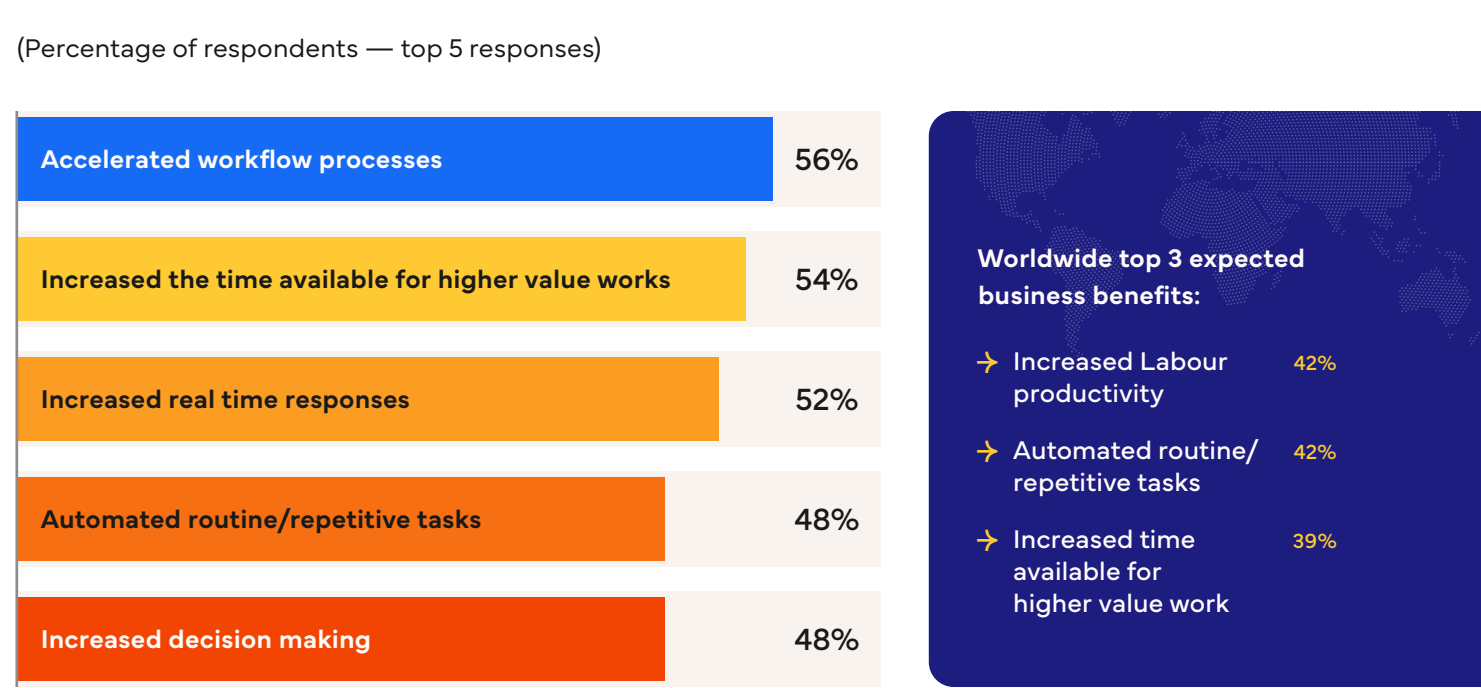
n = 50 (Canada), Source: IDC Labour Forecast Agentic AI Study, August 2025

Business benefits expected from use of AI in Canada

Accelerated workflow processes is the top expectation from AI tools in Canada

Which business benefits do you expect from the use of AI tools?

(Percentage of respondents — top 5 responses)



n = 50 (Canada), n = 823 (Worldwide), Source: IDC Labour Forecast Agentic AI Study, August 2025

Worldwide top 3 expected business benefits:

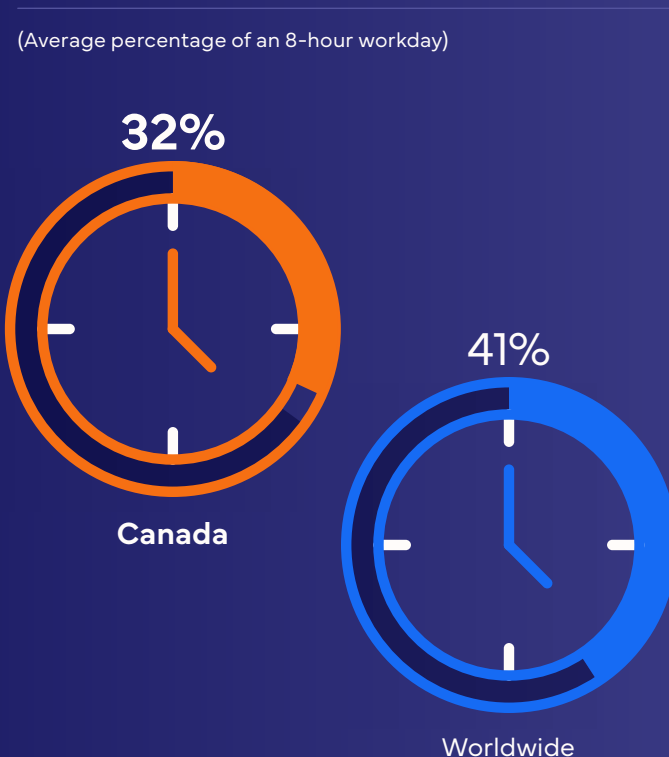
- Increased Labour productivity 42%
- Automated routine/repetitive tasks 42%
- Increased time available for higher value work 39%

Impact of AI on work

On average, workers in Canada expect to save 32% of their typical day using AI tools.

Generally, how much time do you estimate you save in a typical 8-hour workday as a result of using AI tools for your tasks?

(Average percentage of an 8-hour workday)



n = 50 (Canada), n = 823 (Worldwide), Source: IDC Labour Forecast Agentic AI Study, August 2025

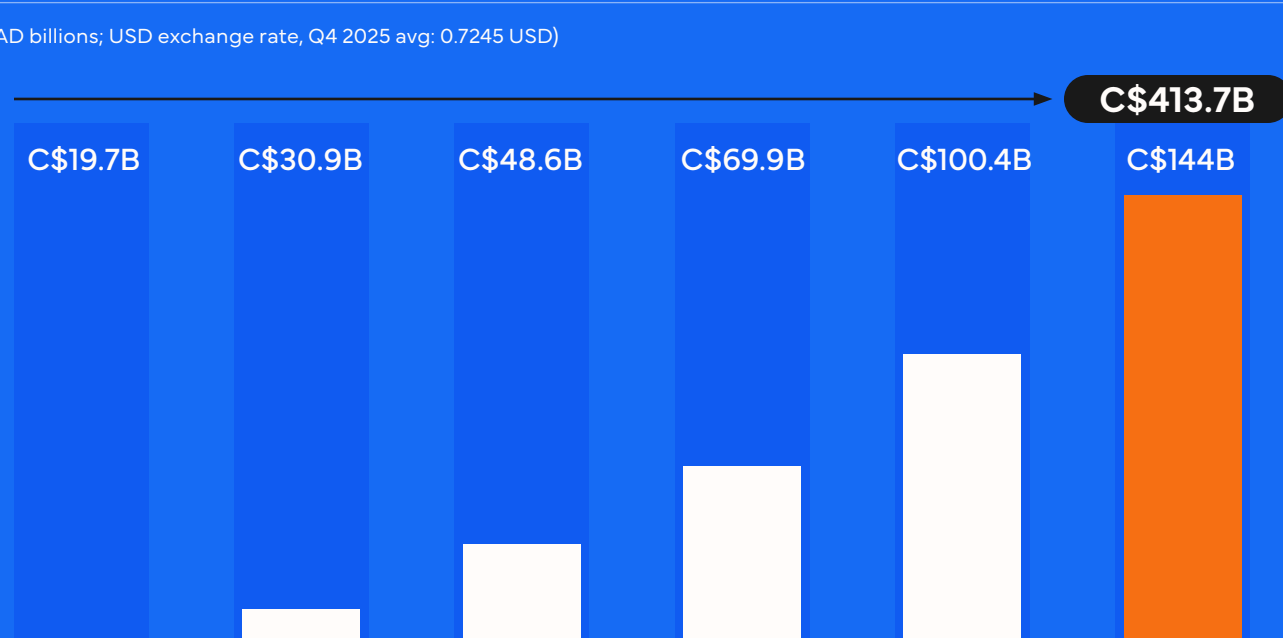


Quantifying the economic impact of digital labour

In Canada, digital labour will generate a cumulative economic impact of **C\$413.7 billion with CAGR of 49% by 2030**. Globally, it will reach C\$17.5 trillion.

Cumulative economic impact of digital labour in Canada 2025–2030

(CAD billions; USD exchange rate, Q4 2025 avg: 0.7245 USD)



Source: IDC custom derivative of IDC's AI and Generative AI Spending Guide, 2025