Google Canada

AI Opportunity Report

2024

PUBLIC FIRST
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About Us

Public First is a global strategic consultancy that works to help organizations better understand public opinion, analyse economic trends and craft new policy proposals.

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Canada's AI Opportunity

As Artificial Intelligence (AI) increasingly weaves into daily life, Canadians are interested in understanding how it is shaping their economy, workplaces, and communities. Google has commissioned Public First, an independent consultancy, to assess how AI is being used in Canada today and its potential benefits for Canadians' futures.

AI is already changing how Canadians live and work, from rapidly analyzing complex data to assisting everyday tasks like meal planning or finding the quickest route across town. The potential benefits are profound: our research suggests that **generative AI could boost Canada's economy by up to $230 billion**, while **saving the average worker 170 hours a year** (the equivalent of 21 working days), freeing up time for more fulfilling and creative tasks.

However, to turn this potential into reality, individuals and organizations need to have the right tools, skills, and confidence to make the most of this transformative technology.

AI awareness is on the rise in Canada, led by younger Canadians.

- **Canadians are becoming more confident in their knowledge of AI.** Overall awareness of AI among Canadians now stands at 86%, and since 2022, the share of adults who feel they **know "a lot" or a "moderate amount"** about AI has grown from 32% to 38%. When asked how they feel about AI, the most common responses were **curiosity** (38%) and **interest** (37%).
- **Younger generations are at the frontier.** Canadians under 35 are more likely to engage with AI, with **52% having taught someone else** how to use it and **53% encouraging others to try it**. This significantly contrasts with those aged 45-54, where only 28% have taught someone and 31% have encouraged others.
- **Canadians are increasingly adopting AI tools in the workplace.** Half of Canadians (53%) said that they were already using a **generative AI tool in their work lives** at least once a week, with this figure increasing to 67% among individuals under 35 years old.
- **A significant portion of Canadians are investing in AI tools.** 1 in 5 Canadians surveyed say they have **spent money on AI tools** in the last 6 months (e.g. a subscription to Google Gemini), rising to more than 1 in 3 (36%) for under 35 year olds.

86%

Overall awareness of AI among Canadians

53%

of Canadians under 35 encourage others to try AI

67%

of Canadians under 35 are using a generative AI tool in their work lives at least once a week

1 in 5

Canadians say they have spent money on AI tools in the last 6 months

Canadian business leaders' confidence in AI is growing.

- **Canadian businesses are leaning into AI, though there's more work to be done.** Between 2024 and 2025, the proportion of Canadian business leaders "definitely using" AI almost doubled from 24% to 46%. In the same period, the proportion of business leaders who say they "know a lot" about AI increased over threefold from 9% to 31%. These jumps suggest rapidly increasing awareness of AI amongst business leaders, but there is still significant ground to cover.
- **Canadian leaders are optimistic about AI for their businesses and the Canadian economy as a whole.** 84% think AI offers an **important opportunity** for the Canadian economy, 79% agree AI will have a positive impact on **improving productivity**, and 70% agree that AI will help to **increase their sales or revenue**.
- **Companies are leveraging AI for a range of tasks.** The most commonly reported uses of AI included helping draft documents (36%) and data analysis (33%).
- **While AI adoption is in its early stages, an increasing number of businesses report interest in exploring AI tools.** Driven by growing interest from SMBs, Canadian business leaders who expect their company to explore AI tools more in the next few years jumped from 53% to 82% in the last year alone.

AI Opportunity: Canadian Cybersecurity

Beyond productivity, AI also has potential to enhance the security of Canada and its citizens. AI-powered tools can proactively monitor and detect emerging digital security threats, safeguarding individuals, businesses, and public institutions. By 2035, we estimate AI could prevent $9.01 billion in costs from cybersecurity threats and fraud, making it a vital part of Canada's digital resilience strategy.

46%

of Canadian businesses leaders who are 'definitely using' AI. Almost doubling from 2024 to 2025.

84%

of business leaders think AI offers an important economic opportunity

36%

of respondents use AI for drafting documents

82%

of Canadian business leaders expect their company to explore AI tools more going forward

Upskilling is essential to fully unlock Canada's AI opportunity.

As AI adoption grows, ensuring individuals have the skills and confidence to use these tools effectively will be critical to broadening participation and realizing the technology's full potential.

Practical and perceptual barriers still limit workers from integrating AI into their workflows. Among individuals not currently using AI at work, the top reasons included "It's not relevant to my job tasks" (41%), "I prefer traditional methods" (27%) and "data privacy concerns" (24%).

However, Canadians show strong interest in building their AI capabilities. In our research, a majority of Canadian workers expressed interest in every training topic surveyed. The most popular topics included:

1. How to use AI responsibly (70%)
2. Automating repetitive tasks (68%)
3. Applying AI to real-world use cases (67%)
4. Improving prompting skills (67%)

Together, these findings suggest that targeted support and skills training are essential to building the confidence Canadian workers and organizations need to fully realize the economic and productivity benefits of AI.

As part of their work in Canada, the **Google Career Certificate program** offers accessible, online training in high-demand fields such as IT support, data analytics, and project management. Over **54,000** people in Canada have already graduated from the **Google Career Certificate** program, with **75%** of certificate graduates reporting a **positive career outcome**, like a new job, promotion or raise, within six months of completion.

70%

A majority of Canadian workers expressed interest in every training topic surveyed. How to use AI responsibly was most popular at 70%

54,000

Over 54,000 people in Canada have already graduated from the **Google Career Certificate Program**

75%

of certificate graduates reported a **positive career outcome** like a new job, promotion, or raise within six months of completion

AI in action across Canada.

Across Canada, businesses, institutions, and innovators are harnessing AI to boost productivity and enrich daily life in their communities. Here are a few real stories of how AI is helping organizations of all sizes solve problems that matter.

GoBolt is increasing deliveries while lowering emissions with Google AI.

GoBolt, a Canadian-based logistics provider, is partnering with Google Cloud to achieve a dual goal: dramatically increase delivery volumes while significantly reducing its carbon footprint. With Google's dynamic route optimization and data analytics, GoBolt is proving we can drive economic growth and protect Canada's environment. **Learn More**.

1.4M

In 2024, GoBolt completed over 1.4 million deliveries on electric vehicles, and innovations like Google's Geocoding API helped reduce delivery distances by nearly 20%

Quebec City is reducing traffic and emissions with Google AI.

Beyond commuter frustration, urban congestion presents a major environmental problem. Quebec City is the first municipality in Canada to launch Google's Project Green Light, an initiative that uses AI to reduce stop-and-go traffic, decrease vehicle emissions, and improve the lives of people in cities around the world. **Learn More**.

"An innovative project like Green Light allows us to tangibly and quickly optimize our road network, thereby offering more fluidity and efficiency in travel."

Bruno Marchand, Mayor of Quebec City

Destination Canada is growing local tourism with the help of Google AI.

Tourism is one of Canada's most powerful economic engines, but insights were fragmented across industries. To solve this, Destination Canada leveraged Google Cloud's end-to-end enterprise capabilities, including its advanced AI and analytics tools, to create the Canadian Tourism Data Collective, a single platform for all industry insights that makes data more accessible and decisions more effective. **Learn More**.

34B

The Canadian Tourism Data Collective transformed how tourism operators, governments, and investors make decisions by turning 34 billion rows of data into real-time, AI-powered insights

The Ottawa Catholic School Board is inspiring students while saving teachers time with Google AI.

The Ottawa Catholic School Board is using Google AI to help teachers meet students' unique needs. Teachers are now creating personalized lesson plans more efficiently, saving valuable time on preparation and administration. This shift allows them to dedicate more time to directly support students. **Learn More**.

"Google Gemini helps us to personalize education in ways we never thought possible. It allows teachers to save time in order to spend more time with students on the things that are really important."

Geoffrey Edwards, Superintendent of Learning Technologies

AccessNow is mapping Canada's accessible spaces with Google AI.

To empower people with disabilities to navigate the world with confidence, AccessNow developed a community-driven platform using Google Maps to rate locations based on accessibility. Facing the challenge of scaling diverse user data, AccessNow chose Google Cloud and integrated Google AI to analyze images and automatically tag key accessibility features. The platform has dramatically scaled to include nearly two million places across 100 countries. **Learn More**.

100

With support from Google AI, AccessNow's platform now provides vital accessibility information to nearly two million places across 100 countries

Methodology

Polling

Polling claims are derived from two anonymous, online surveys of **4,002** adults and **755** senior business decision makers based in Canada in June 2025, conducted in English and French. All results are weighted using Iterative Proportional Fitting, or 'Raking'. The results of the adult consumer survey are weighted by age group, gender, province and education level to nationally representative proportions. The results of the business survey are weighted by business size (employee share) and province to nationally representative proportions.

We used a range of different panel providers who contacted respondents on our behalf. In return for their participation in our survey, respondents were provided with a financial incentive.

Like all polling data, market research is susceptible to poor memory or consumers not answering truthfully. In order to reduce the risk of this, we completed a number of standard quality checks on the polling data to help ensure that respondents are paying attention:

- Excluding respondents who fail an attention check, e.g., in the middle of a longer question, we ask them to pick a particular option if they are reading;
- Excluding respondents whose answers all perfectly match another;
- Excluding respondents whose open text answers are incoherent or look like they have been generated by a computer bot. This is done through manual checks.

Potential economic impact of AI

Our headline estimate for the potential impact of AI is based on the Goldman Sachs methodology for calculating the growth and productivity impact of AI.

In order to estimate the economic impact of AI, we:

- Draw on the US O*Net occupation database, which contains information on 51 different types of work activity for around ~800 types of occupations
- Based upon Goldman Sachs' identification of the types of tasks exposed to automation by generative AI, classify the proportions of tasks in each occupation that are susceptible to automation.
- Aggregate this into broader economic categories based on their overall share of US employment and average wage bill, and then create our own crosswalk to convert the results from each occupation to the corresponding occupation in ISCO-08.

- Aggregate by wagebill, occupation and sector to produce an estimate of the total possible improvement in labour productivity.
- Assume capital intensity remains constant, and convert this labour productivity improvement into an overall improvement in GVA.

Time savings from AI

We estimate the time saved by AI for the average Canadian worker through multiplying:

- Our estimate of the total possible improvement in labour productivity from **Potential economic impact of AI**
- The average number of hours worked annually by Canadians
- The rate of AI adoption in Canada. We calculate AI adoption in Canada by modelling S-curve shaped growth in the following:

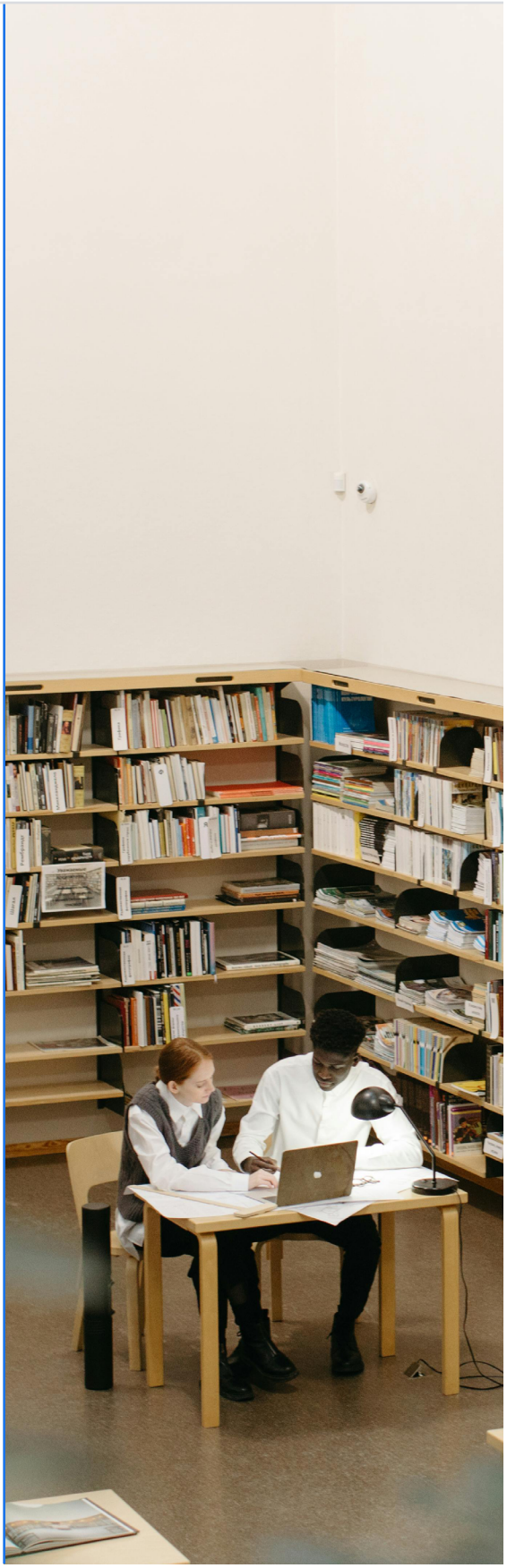
    AI adoption across citizens. We estimate this using download rates of AI tools such as Gemini from Sensor Tower data

    AI adoption in enterprises. We estimate this using Google Patents Public Data on the frequency of AI-related patent applications.

Potential impact of AI on cybersecurity

We estimate the cost savings from AI through:

- **Estimating total cost of data breaches:** We calculate the total cost of data breaches by country using existing third party cost-per-breach estimates, such as the Surfshark dataset on recorded breaches.
- **Faster responses to data fraud:** We then apply IBM's reported 33% cost reduction from AI-driven rapid response yields potential savings, adjusting for each country's cybersecurity readiness and AI adoption levels.
- **Preventing phishing:** We estimate national phishing costs using country-specific reports (e.g., Singapore's 2024 Cybercrime Brief) or, where unavailable, DMARC phishing data combined with regional averages. AI's effectiveness (95–99.5% accuracy versus 96% human accuracy) informs estimated savings from reduced phishing success rates. Results are adjusted by country-specific AI adoption and cybersecurity readiness.



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