ILLUMINATING CANADA'S AI OPPORTUNITY GAP

Who stands to gain, and who might be left behind?

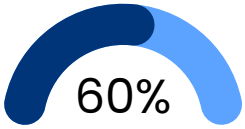
Presented by BMTechLytics

Overview

Canada stands at an inflection point: as artificial intelligence transforms work, not all are equally positioned to benefit. Our analysis shows that while a substantial share of Canadian jobs fall into "high exposure" categories, only a subset offer strong complementarity potential. Risks of displacement concentrate in mid-skill, routine roles unless reskilling is targeted.

Layering demographic lenses reveals that gaps already pervasive in wages (e.g. 12 %+ gender gap) and labour force participation (visible minorities, persons with disabilities) may widen under unmitigated AI deployment.

Global context



- 60% of jobs in advanced economies may be impacted by AI (≈40% globally).
- Impact can be positive (augmentation) or negative (displacement)

The visual narrative we share reveals

Which industries and provinces have the highest concentrations of AI-exposed roles (and where complementarity is plausible)

Which demographic groups (women, racialized groups, persons with disabilities) are most vulnerable given existing labour inequities.

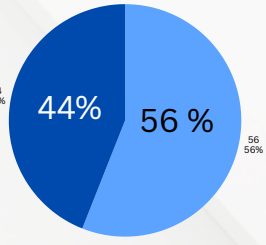
How demand projections (via COPS) intersect with exposure to highlight "opportunity zones" for intervention

Which skills are gaining traction in AI-adjacent job postings (management, communication, technical, social)

Equity signal to watch

- 12.2% gender wage gap among core-age workers in 2024 (women vs men, average hourly).
- Existing gaps risk widening without targeted upskilling/access.

Public-sector roles:
≈ 74 % of workers are in AI-exposed occupations.
Overall Canadian workforce:
≈ 56 % of workers are in AI-exposed occupations.
→ Public sector exposure is ~32 % higher than the national average.



INDUSTRIES & REGIONS UNDER AI PRESSURE (CANADA 2025)

StatCan's C-AIOE index shows ≈ 60 % of Canadian workers in AI-exposed roles, but exposure and complementarity differ sharply by sector and province. 12.2% of businesses used AI in the last 12 months.

The exposure + complementarity pattern holds: many education roles are in transformation rather than elimination.

~72 % of exposed education roles fall into High Complementarity

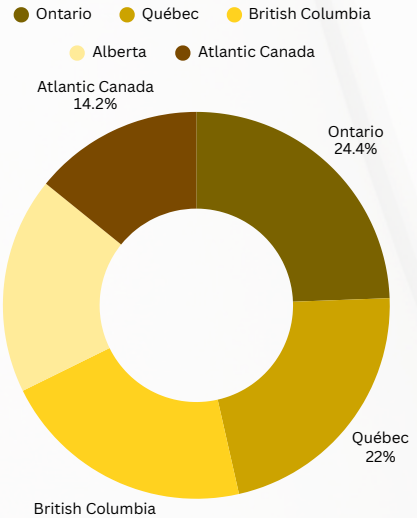
While exposure is elevated, many roles fall into high complementarity, meaning AI augments human judgement (diagnostics, care coordination) rather than replaces entirely.

~68 % of these are augmentation roles (diagnostics, tele-care).

Exposure is moderate in manufacturing; complementarity lower in more routine tasks; so many manufacturing roles are at risk unless retooled.

Only ~46 % of those are complementary

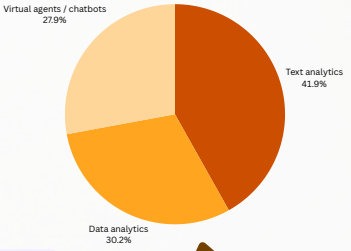
Regional AI Exposure Bar



Statistics Canada C-AIOE (2024); Labour Force Survey (2024); ESDC COPS 2024–2033

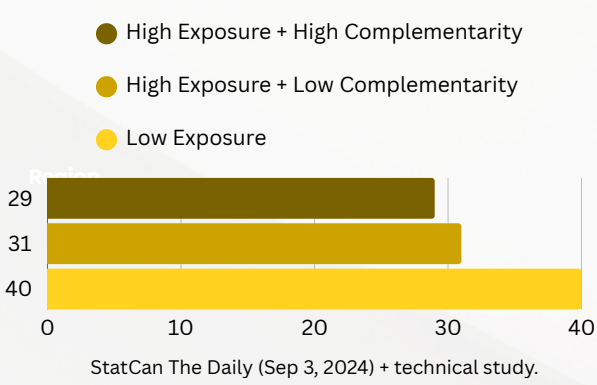
- Junior task compression → mid-skill uplift
- GenAI automates "first draft" coding/writing; value shifts to integration, judgement, and stakeholder work. Expect fewer entry roles that are purely rote, but more hybrid roles that mix ops + data + comms.
- Clerical and routine exposure → bridges, not exits
- The fastest net-positive path is in-place upskilling (workflow automation, CRM/data basics) rather than wholesale career changes.
- Care, education, and public service are resilience engines

Most-used AI applications among users (Q2-2025)



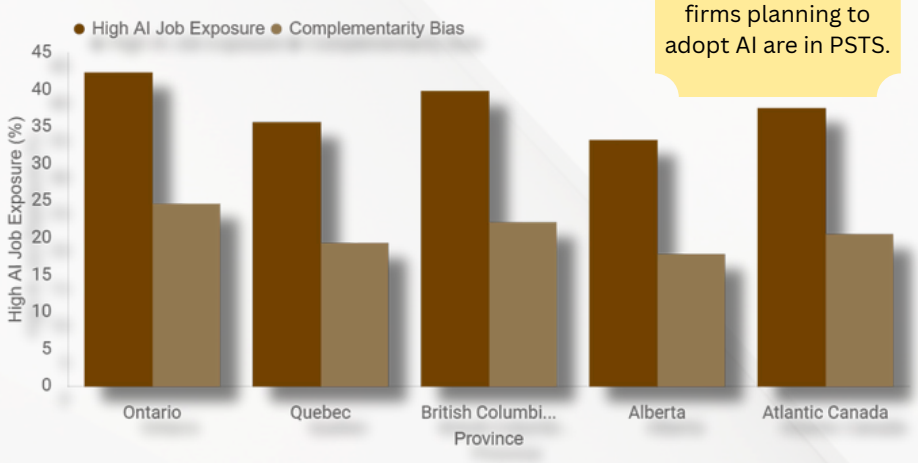
Region	Why?
Ontario (GTA/Waterloo/Ottawa)	Finance + tech HQs; dense vendor ecosystem; public sector scale.Ed-tech and
Québec (Montréal/Québec City)	Research depth + bilingual service economy; strong education/public admin.
British Columbia (Vancouver/Island)	Creative industries, gaming/VFX, climate tech, ports.
Alberta (Calgary/Edmonton)	Energy transition + petrochem; fast IIoT uptake.
Atlantic Canada (Halifax/Moncton/St. John's)	Public sector, universities, contact centres, ocean economy.

Adoption plans in this sector are strong: e.g. in Q3 2025, ~26.3 % of firms planning to adopt AI are in PSTS.



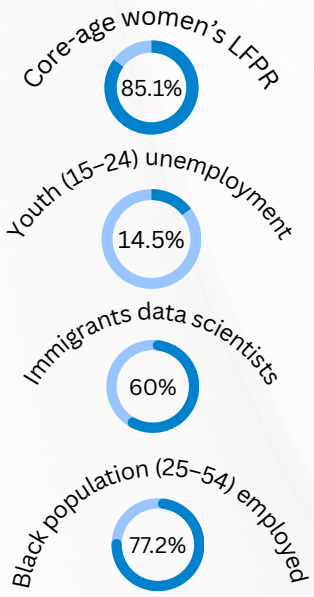
StatCan The Daily (Sep 3, 2024) + technical study.

National AI exposure



WHO BENEFITS?

DIVERSITY, WAGE EQUITY & SKILL GAPS (CAN 2024–2025)



Wage equity (who's advancing, and who isn't?)

- Women 25–54 earn 12.2% less than men on average (hourly). Gap widens to 16.6% for 55+
- Even with a bachelor's+, women earn $0.86 per $1.00 paid to men (≈ 13.9% gap).
- Long-run trend: women's wages grew faster than men's since 2006 (+21.3% vs +15.9%), gap narrowing but not closed.
- Women hold 42.7% of middle-management and 30.8% of senior-management roles (2021); gaps remain at the top.

Gender × Age Distribution in Canada's Workforce (2025)

52%
Male

48%
Female

Opportunity is present, access is uneven. Women participate at record rates, but earn 12.2% less (core-age) and hold only 30.8% of senior roles.

Women slightly over-represented in part-time or entry service roles; high automation exposure.

Strong female participation in education, healthcare, and early-career office work; men dominate IT & trades

Gender gap smallest here: dual-career peak, strong AI upskilling potential.

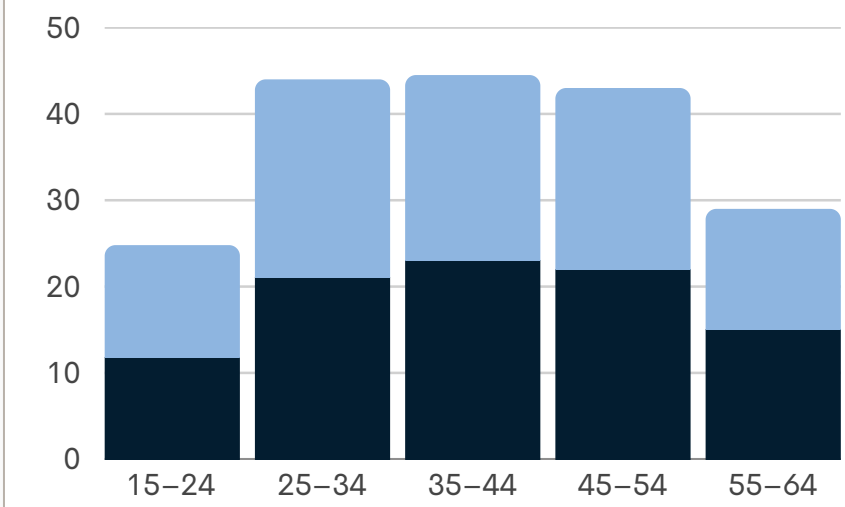
Equal representation; high exposure but moderate complement (management, technical supervision).

Men hold more senior technical roles; women more in education & healthcare.

Immigrants power Canada's AI core (60% of data scientists) → retention pathways matter

Youth and Black Canadians face steeper headwinds (higher unemployment / lower employment rate) → target placement + mentoring

Firms are retraining, not replacing. Nearly 4 in 10 AI adopters train staff; job postings lag in listing GenAI explicitly.

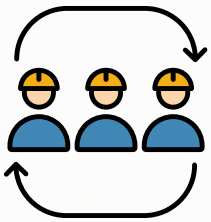


Statistics Canada – C-AIOE 2024; Labour Force Survey 2024–25; Women in STEM 2024

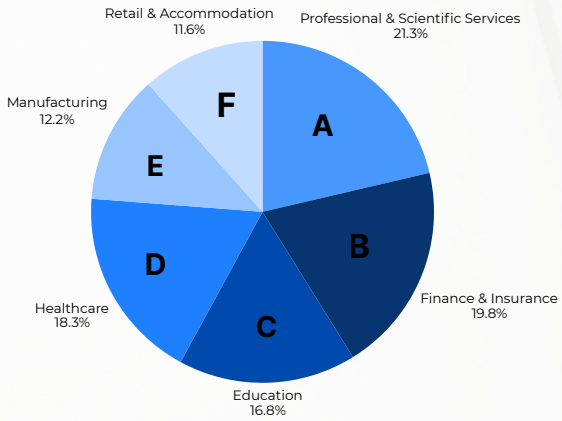
THE SKILLS SHIFT: CANADA'S WORKFORCE IN TRANSITION

Skills Demand Shifts (2024-2033)

- Analytical & Critical Thinking +34 %
- Digital & Data Literacy +29 %
- Creativity & Problem Solving +22 %
- Leadership & Coordination +18 %
- Routine Manual Tasks −24 %
- Clerical & Record-Keeping −31 %



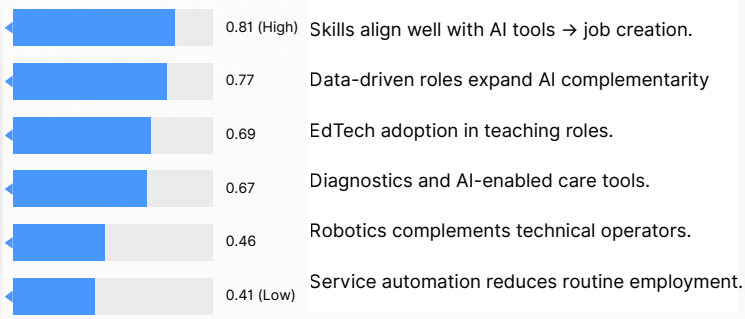
AI Complementarity Index: Skills by Sector



By 2033, Canada could face a 50 % gap between rising cognitive/digital skills and declining routine work.

Without re-training, ≈ 1.6 million workers risk partial displacement.

Complementarity Score (0–1)



What skills are rising (and falling) with AI?

Social and language skills

National exposure split (C-AIOE, Census 2016/2021): ~60% of employees are in AI-exposed jobs; about half of them are in high-complementarity roles (augmentation potential).

At-risk cluster (High exposure, low complementarity)	"Bridge" skills to target	Target roles (Higher complementarity)
Admin/Clerical (Excel, MS Office, filing, report prep are dominant skills in HE-LC postings)	Data literacy, CRM basics, workflow automation, comms	Operations coordinator, claims/benefits analyst, junior data support
Retail/Service (routine transactions)	POS analytics, customer insight, AI-assisted support, scheduling	Customer success, store ops analyst, workforce scheduler
Manufacturing operators	Predictive maintenance, QA data capture, H&S + sensor basics	Maintenance tech, quality technician, industrial IoT assistant
Public service clerks	Records digitization, prompting for case triage, privacy & bias	Service-design associate, case triage analyst

12.2% of Canadian businesses used AI in the past 12 months

89.4% reported no change in employment

WHICH?

28% Canadian job ads explicitly mention GenAI

18% AI-skills demand (Lightcast) postings in 2024