

#### Quantifying the Impact of the Digital **Labor Economy** in Brazil

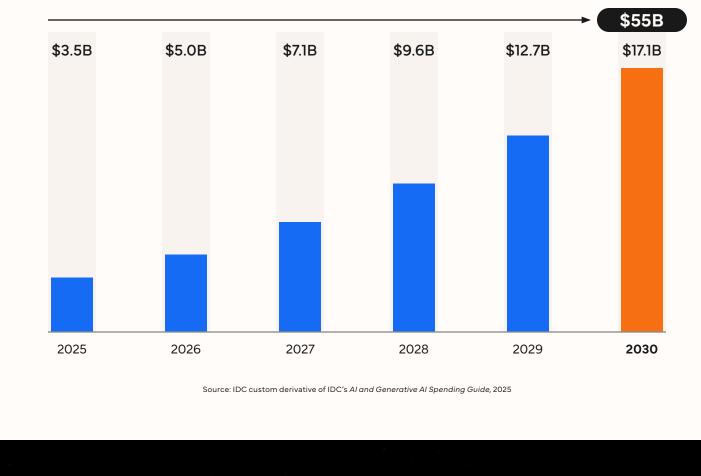
**Exploring Digital Labor** Software and Services



#### AI spending forecast supporting digital labor In Brazil, cumulative spend in AI technologies supporting digital labor will reach \$55 billion with CAGR of 37%

(USD billions)

by 2030. Globally, it will reach \$3.34 trillion. Cumulative spend on AI supporting digital labor in Brazil 2025–2030

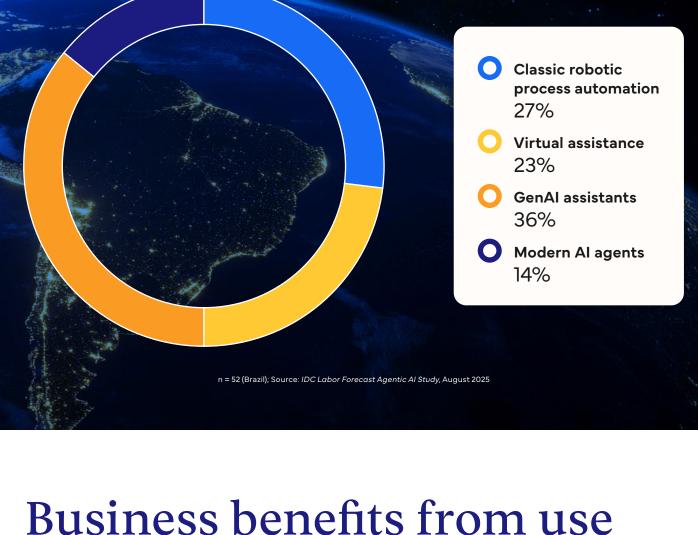


# What percentage of AI tools you use fall into the following categories? (Mean responses)

Use of AI tools by the

Brazilian workforce

Workers are transitioning from legacy to emerging AI tools.



### Which business benefits do you expect from the use of AI tools? (Percentage of respondents — top 5 responses)

Improved customer satisfaction is the top expectation from

of AI in Brazil

Al tools in Brazil.

Accelerated workflow processes

Increased revenues

**Reduced labor costs** 

Worldwide top 3 expected Automated routine/repetitive tasks 38% business benefits: → Increased labor

38%

38%

37%



productivity

Increased time

available for higher value work

→ Automated routine/

repetitive tasks

42%

42%

39%

### 41%

Worldwide n = 52 (Brazil), n = 823 (Worldwide); Source: IDC Labor Forecast Agentic Al Study, August 2025 Quantifying the economic impact of digital labor

Generally, how much time do you estimate

as a result of using AI tools for your tasks?

you save in a typical 8-hour workday

(Average percentage of an 8-hour workday)

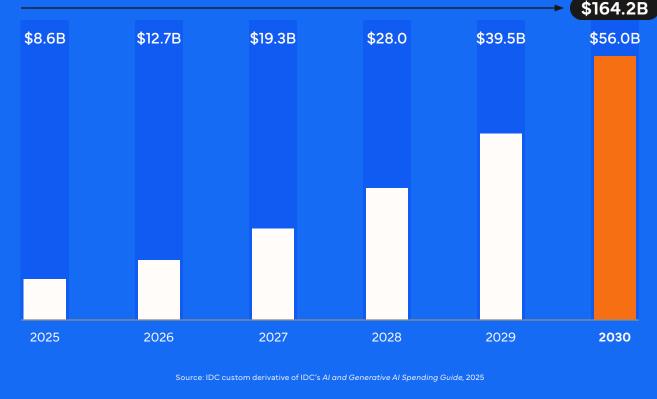
44%

**Brazil** 



# Globally, it will reach \$13 trillion.

Cumulative economic impact of digital labor in Brazil 2025–2030 (USD billions)



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