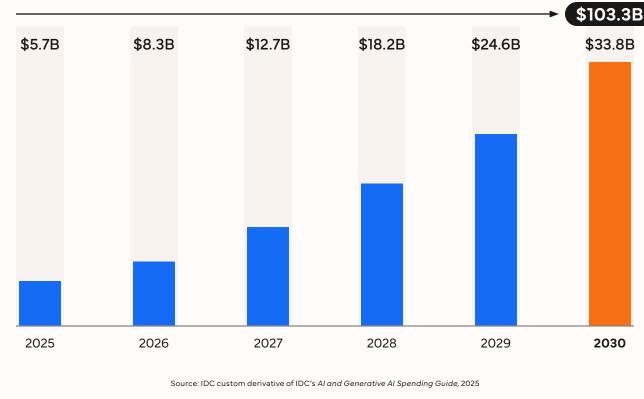


AI spending forecast supporting digital labor In Japan, cumulative spend in AI technologies supporting digital labor will reach \$103.3 billion with CAGR of 43%

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

(USD billions)

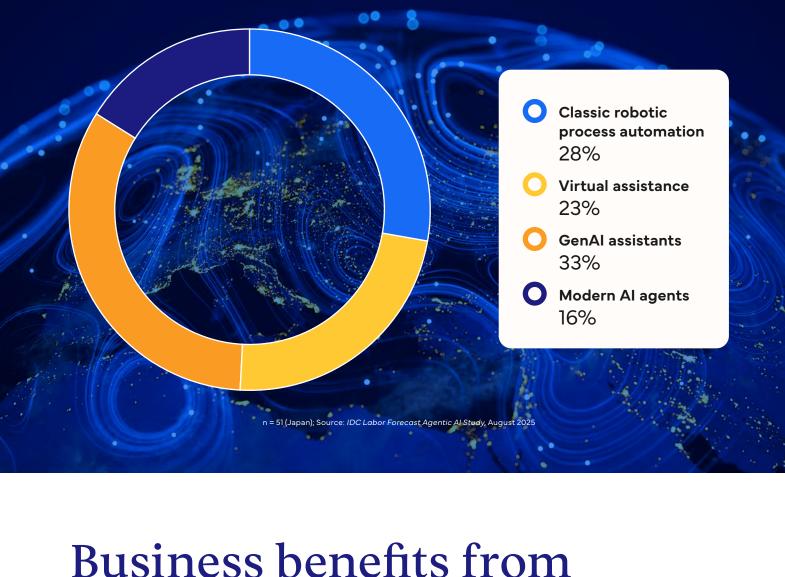
(Mean responses)



Japanese workforce Workers are transitioning from legacy to emerging Al tools.

Use of AI tools by the

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



Which business benefits do you expect from the use of AI tools? (Percentage of respondents - top 4 responses)

Automation of routine tasks is the top expectation

use of AI in Japan

from AI tools in Japan.

Accelerated workflow processes

Increased the time available for

Increased labor productivity 54% Worldwide top 3 expected business benefits: Increased labor Automated routine/repetitive tasks 52%



of their typical day using AI tools.

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)

Japan



productivity

Increased time

available for

48%

46%

Automated routine/ repetitive tasks

higher value work

42%

39%

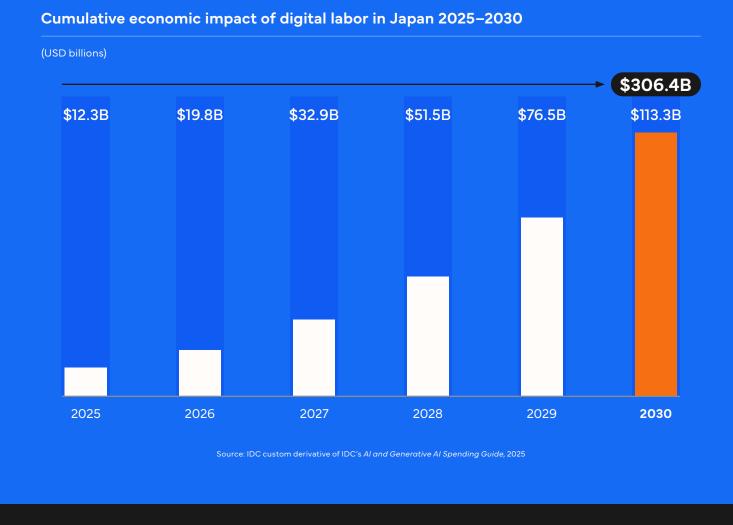
37%

41%

Worldwide n = 51 (Japan), n = 823 (Worldwide); Source: IDC Labor Forecast Agentic AI Study, August 2025 Quantifying the economic

In Japan, digital labor will generate a cumulative economic impact of \$306.4 billion with CAGR of 56% by 2030. Globally, it will reach \$13 trillion.

impact of digital labor



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