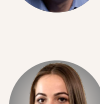


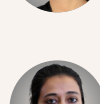


Quantifying the Impact of the Digital Labor Economy in Spain

Exploring Digital Labor Software and Services



Alan Webber



Carla La Croce



Teodora Snoddy



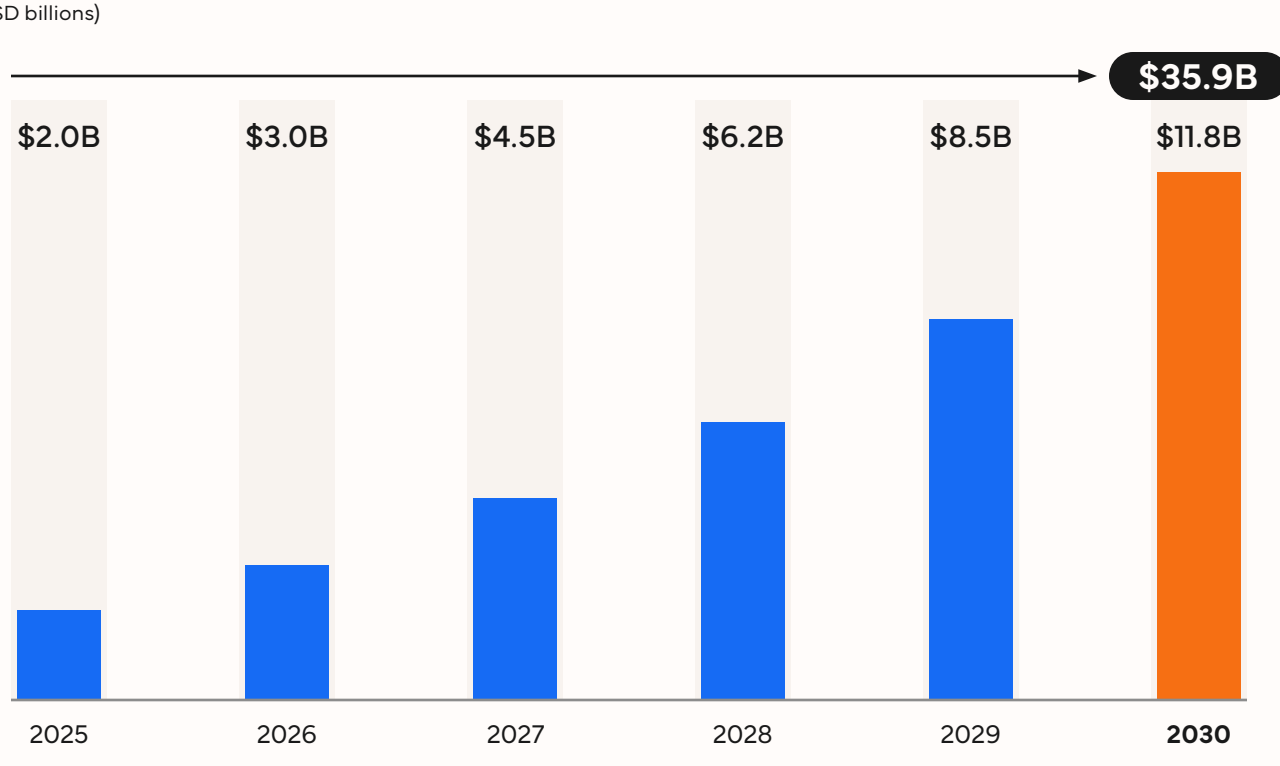
Kritika Ghildiyal

AI spending forecast supporting digital labor

In Spain, cumulative spend in AI technologies supporting digital labor will reach **\$35.9 billion with CAGR of 43% by 2030**. Globally, it will reach \$3.34 trillion.

Cumulative spend on AI supporting digital labor in Spain 2025–2030

(USD billions)



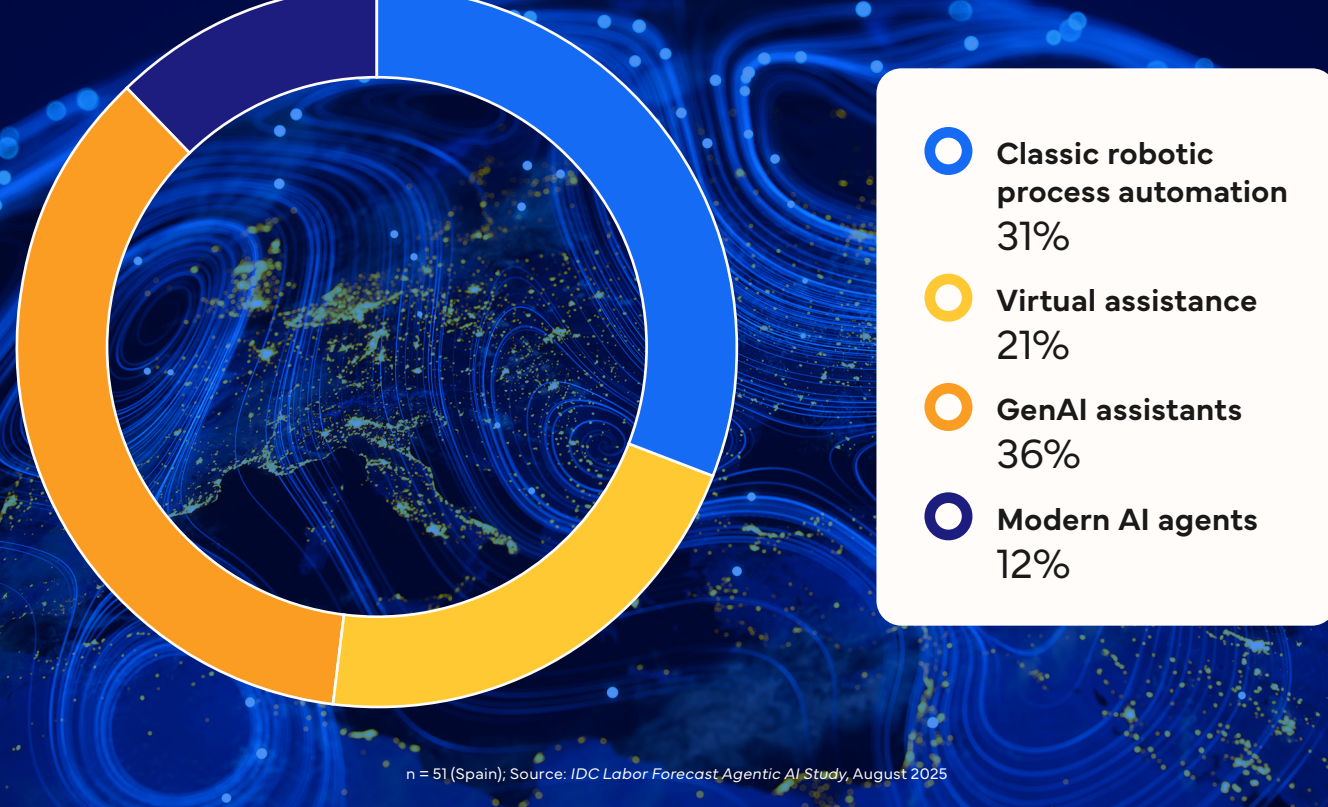
Source: IDC custom derivative of IDC's AI and Generative AI Spending Guide, 2025

Use of AI tools by the Spanish 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 = 51 (Spain); Source: IDC Labor Forecast Agentic AI Study, August 2025

Business benefits from use of AI in Spain

Automation of routine tasks is the top expectation from AI tools in Spain.

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

(Percentage of respondents – top 5 responses)



Worldwide top 3 expected business benefits:

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

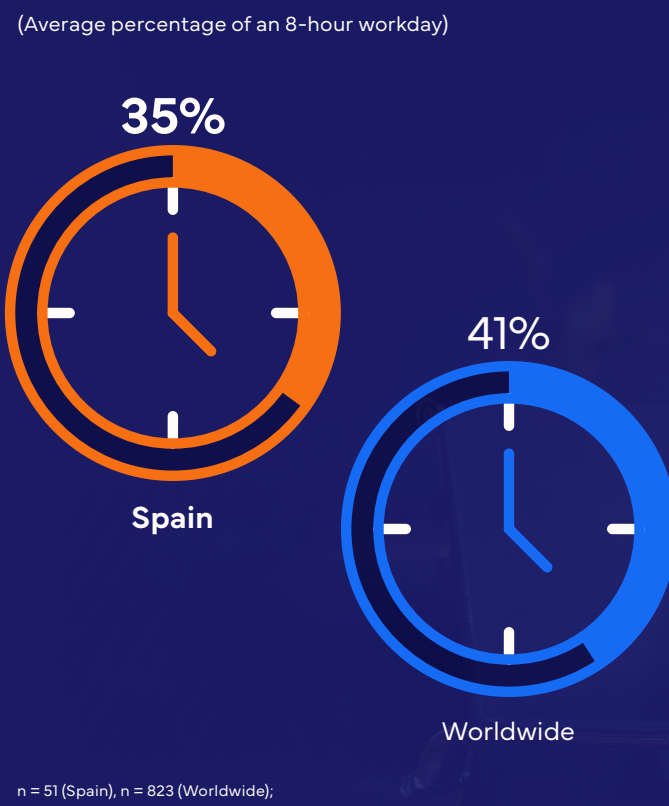
n = 51 (Spain), n = 823 (Worldwide); Source: IDC Labor Forecast Agentic AI Study, August 2025

Impact of AI on work

On average, Spanish workers expect to save 35% 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 = 51 (Spain), n = 823 (Worldwide); Source: IDC Labor Forecast Agentic AI Study, August 2025

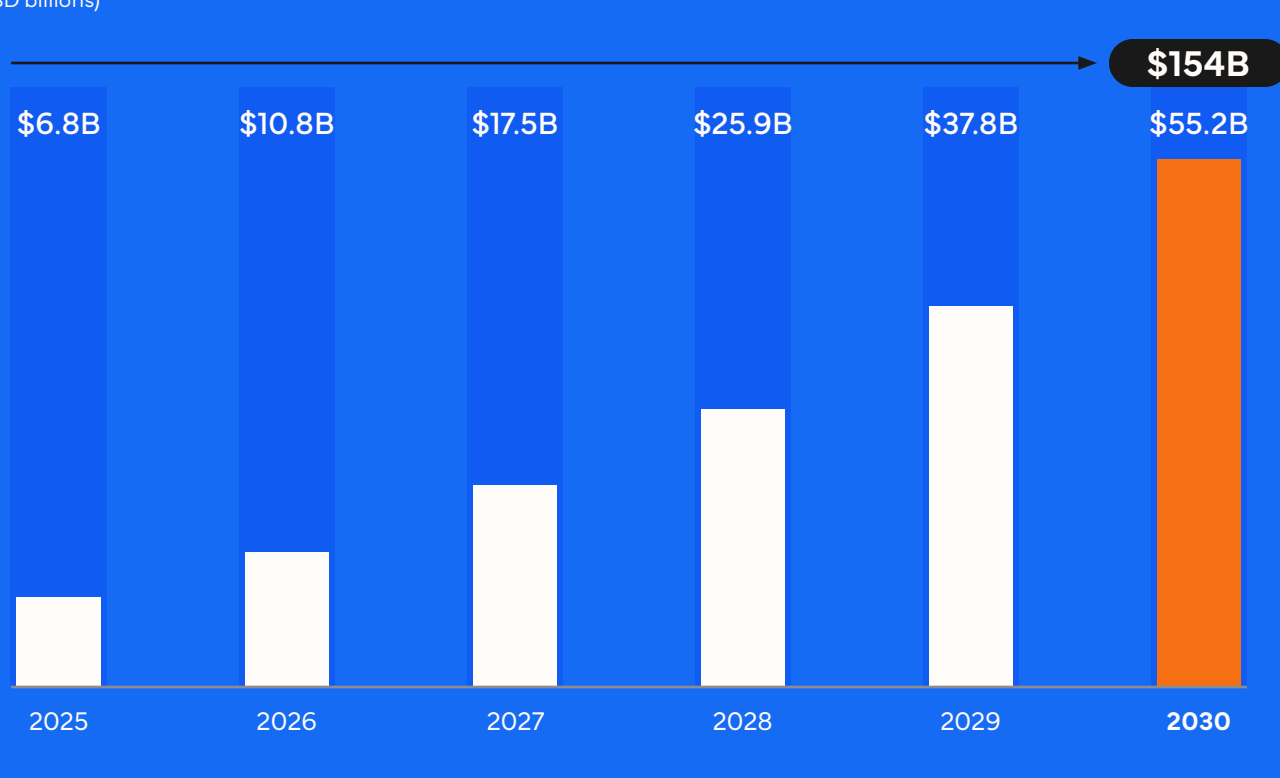


Quantifying the economic impact of digital labor

In Spain, digital labor will generate a cumulative economic impact of **\$154 billion with CAGR of 52% by 2030**. Globally, it will reach \$13 trillion.

Cumulative economic impact of digital labor in Spain 2025–2030

(USD billions)



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