

# Voice of the CEO on Digital Labor

## CEOs Gauge How Prepared They Are for Digital Labor



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# In This InfoBrief

**The purpose of this study is to analyze the voice of the CEO on digital labor.**

The emergence of digital labor has elevated a risk-reward equation for CEOs to balance. While companies are eager to capitalize on the capabilities digital labor can provide, employees are looking to the CEO for sturdy leadership during a time of workforce transformation.



**72%** of CEOs predict that they and their employees will have AI agents reporting to them within the next five years.



**73%** of CEOs agree that digital labor will transform their organizational structure.

CEOs see digital labor as a boon for their growth mandate:  
**67%** believe that digital labor will be critical to competing in the current economic environment.

This study gauges CEOs' expected outcomes, challenges, and outlook on digital labor.

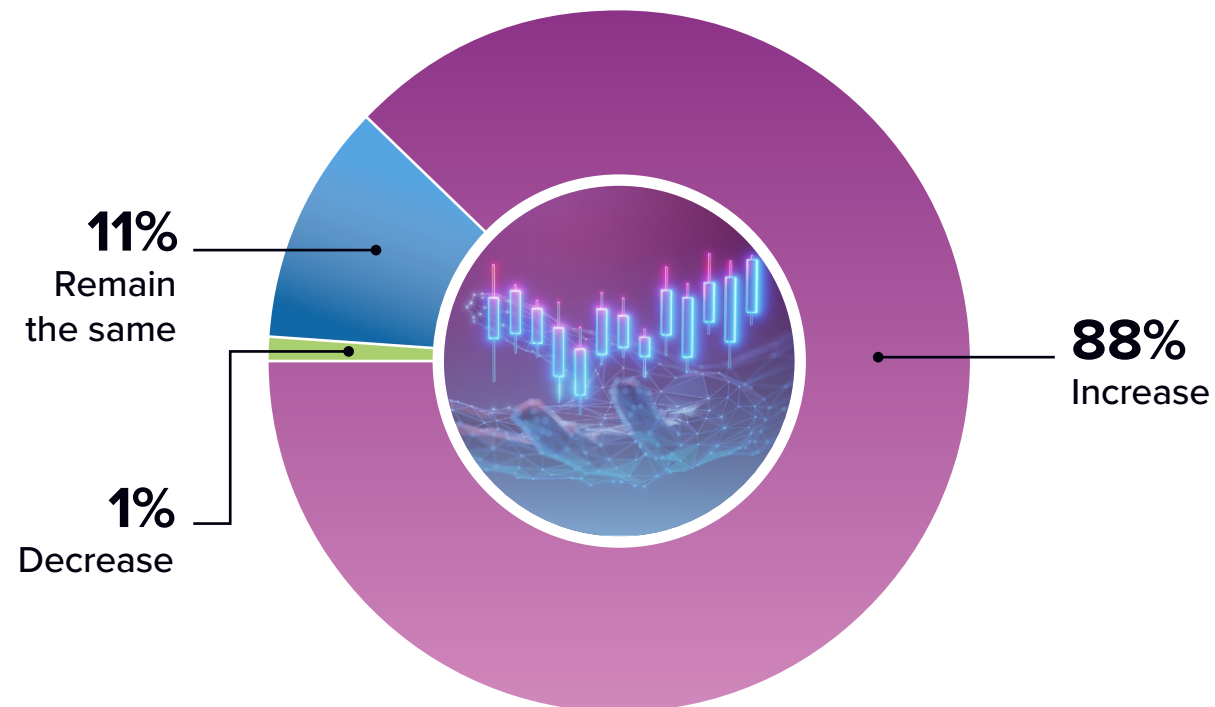
In June/July 2025, IDC surveyed CEOs in North America on the topic of digital labor. The respondents include 103 CEOs from the United States and 52 CEOs from Canada. Respondents must have had plans to adopt digital labor in the next 2–5 years and be knowledgeable of their organization's digital labor initiatives to respond.



# Economic Pressures Aren't Stopping CEOs from Boosting AI Investments

Amid volatility, AI investments appear resistant to cutbacks.

In the next year, will your organization's AI investments increase, decrease, or remain the same?



In the next two years, how much do you expect your AI investments to increase or decrease?

(Mean response)



n = 155; Source: IDC's CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025



# CEOs See Digital Labor as Key to Transformation and Competitiveness

As appetite for AI investment remains resilient, CEOs are assessing how digital labor can revolutionize their business model and existing workforce.

To what extent do you agree or disagree with the following statements about digital labor/agentic AI?

(Agree responses only)

73%

It will transform our  
**organizational structure.**

67%

It will be **critical to compete** in  
the current economic environment.

65%

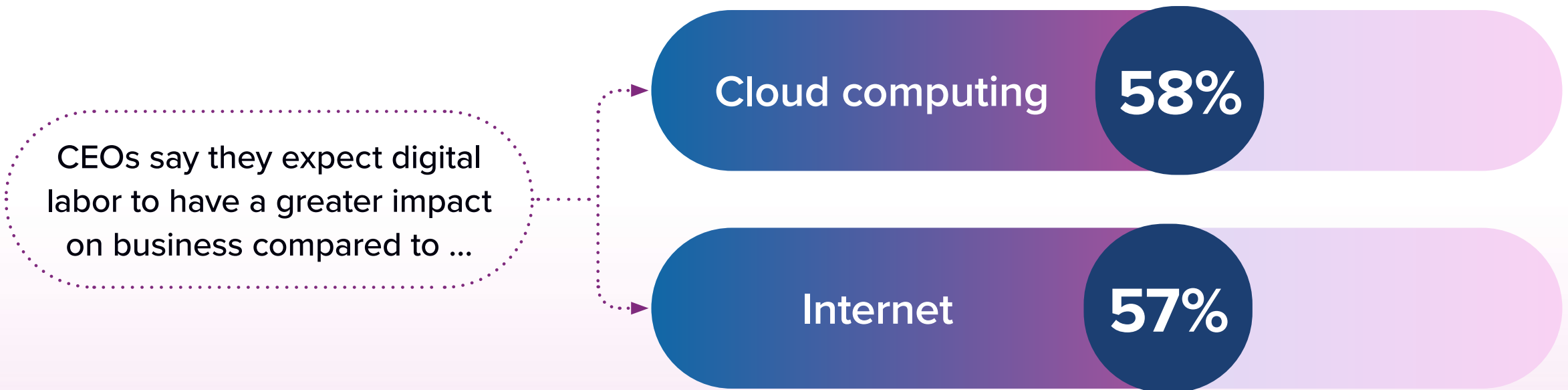
It will transform our  
**business model.**

n = 155; Source: IDC's CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025

# Most CEOs Think Digital Labor's Impact Will Eclipse Those of the Internet and Cloud

Do you expect digital labor to have a greater impact on businesses compared to the following technological revolutions?

(Yes responses)

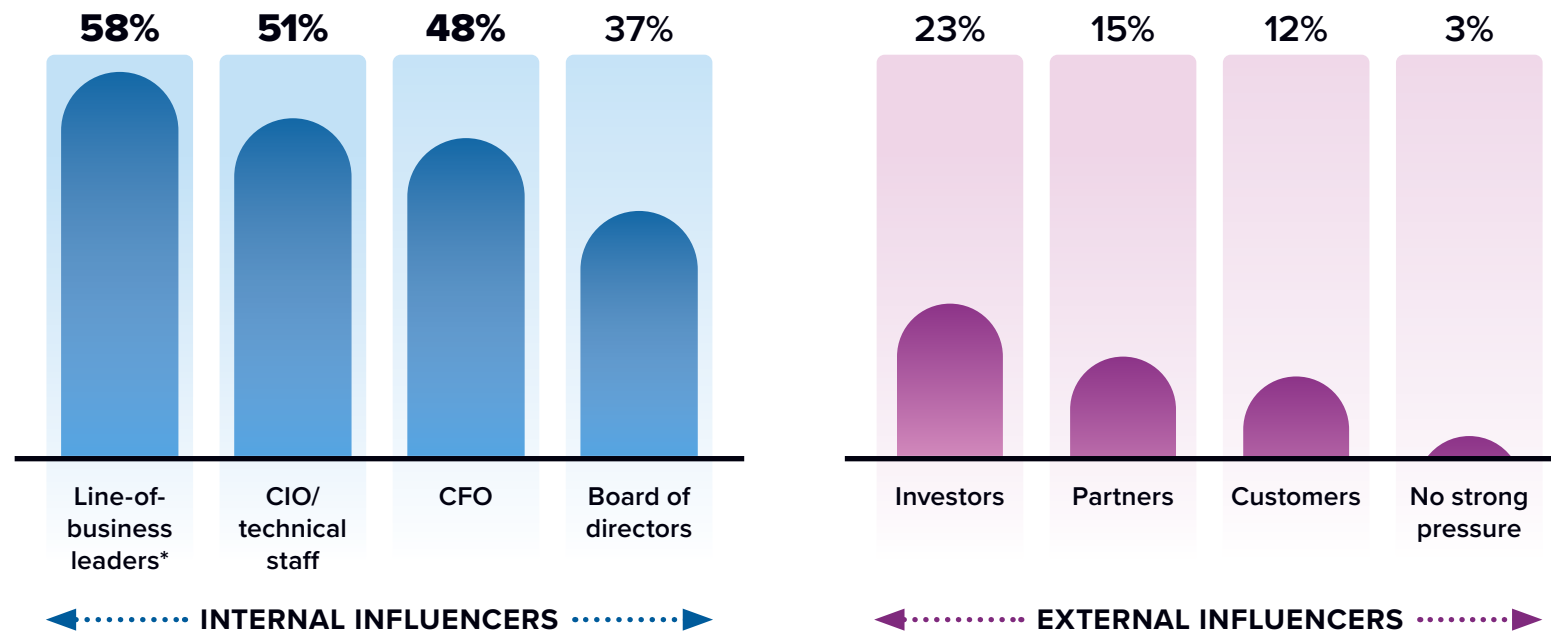


n = 155; Source: IDC's CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025

# C-Suite and IT Leaders Are Pushing for Digital Labor

Digital labor is often linked to enhanced efficiency and productivity. As a result, internal stakeholders are understandably motivated to put pressure on the CEO.

Which of these stakeholder groups are pressuring you the most to implement digital labor?



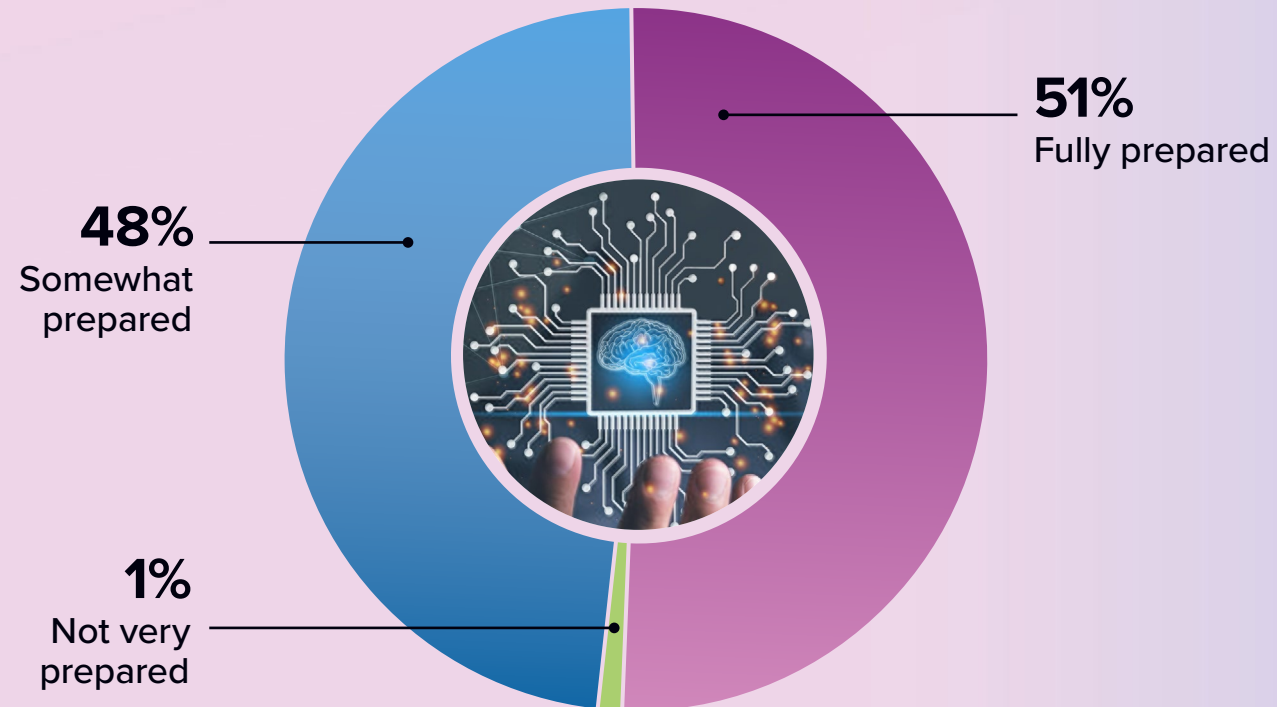
Internal stakeholders have more visibility into current processes. They can see “**what is in it for them**” by implementing digital labor. On the other hand, investors, partners, and customers are one layer removed from day-to-day challenges. This does not mean, however, that the outcomes, for example, increased revenue, improved customer service, improved operational efficiency, will not be beneficial for them as well.



\* Line-of-business leaders include, for example, CMOs and COOs. n = 155; Source: IDC's *CEO Quick Survey — Digital Labor Research*, Sponsored by Salesforce, July 2025 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

# CEOs Believe They Are Ready for Digital Labor

How prepared is your organization to initiate its digital labor initiatives?



n = 155; Source: IDC's CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025



# CEO Wishlist for Digital Labor Goes Beyond Efficiency

When asked without stipulations, what they wish digital labor could do for their organization, CEOs surfaced recurring themes around **efficiency, quality, strategic support, customer experience, and risk reduction.**

In your own words, if you had one wish for digital labor, what would you like it to do for your organization?

“Boost **efficiency** and **reduce errors** to support better decision-making.”

“Provide **data analysis** and **strategic direction** support.”

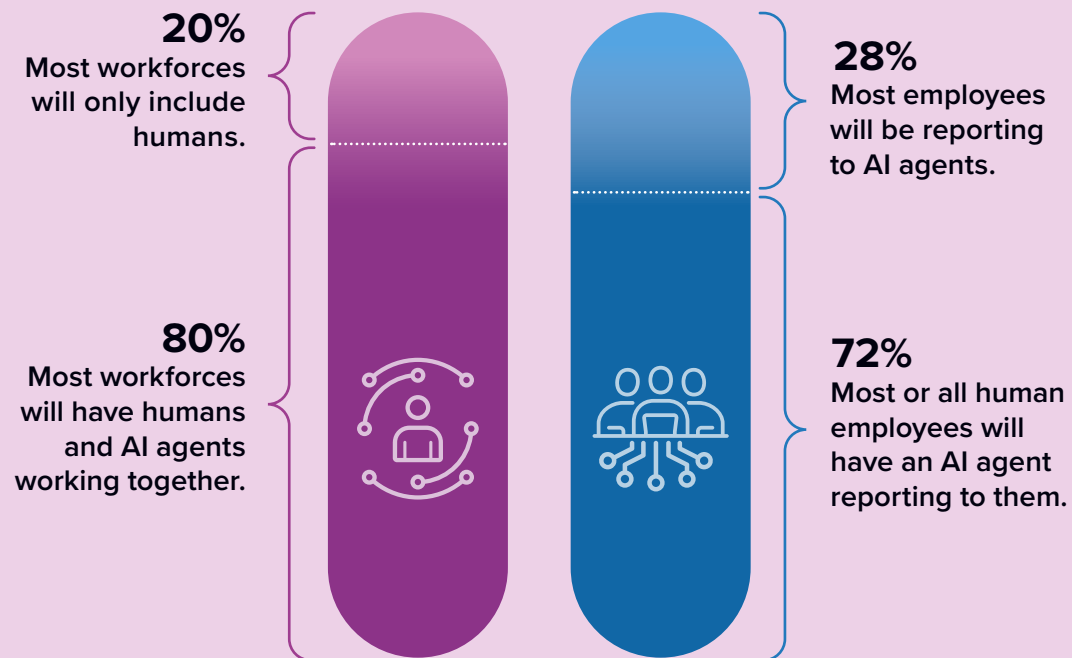
“**Personalize customer interactions** at scale and improve engagement.”

“Proactively **detect** and **resolve IT issues** to reduce downtime.”

# CEOs Anticipate a Blended Workforce That Integrates Human Talent and Agentic AI

For each of the eight opposing statements shown, please select which one between the two will likely occur due to digital labor.

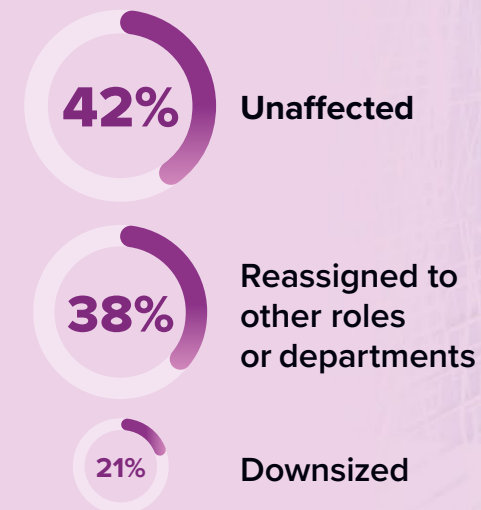
In five years, CEOs believe ...



n = 155; Source: IDC's CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025

As your organization considers implementing AI agents/digital labor, what share of your workforce will have the following impacts?

(Mean response)



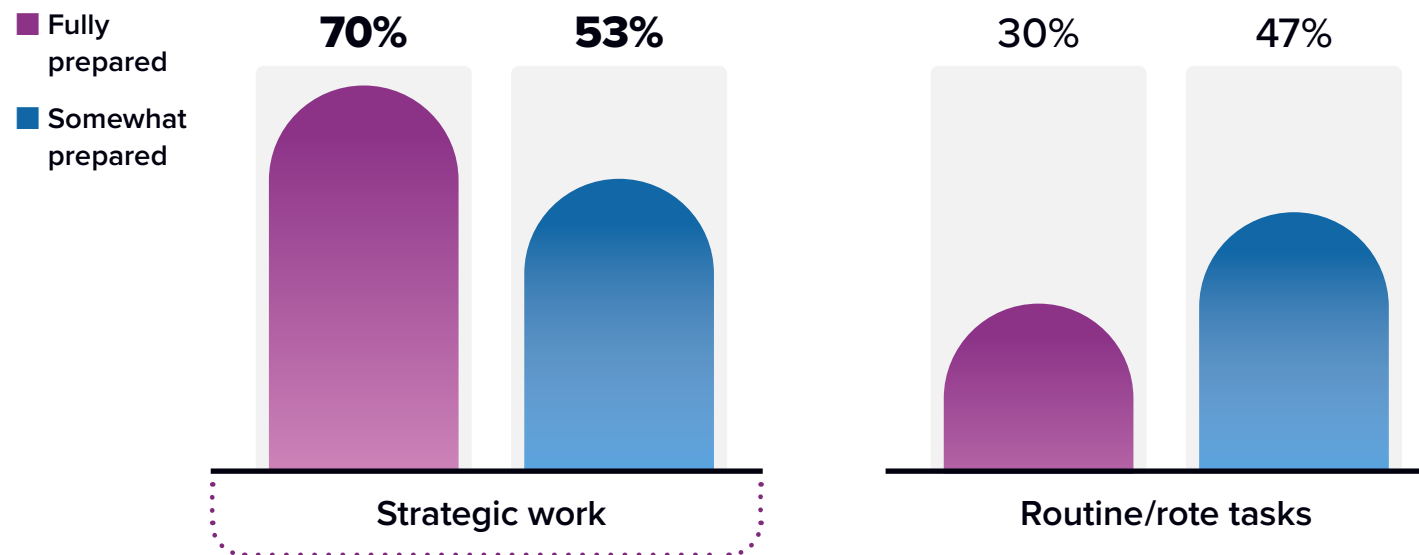
CEOs expect **4** in **5** workers will either remain in their current roles or be redeployed to new ones.

n = 155; Source: IDC's CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025

# CEOs Assess Digital Labor's Fit Across Strategic Work and Routine Tasks

For each of the eight opposing statements shown, please select which one between the two will likely occur due to digital labor.

Digital labor will take on more ...



CEOs — especially those fully prepared for digital labor — believe it will handle **more strategic work** rather than routine/route tasks.

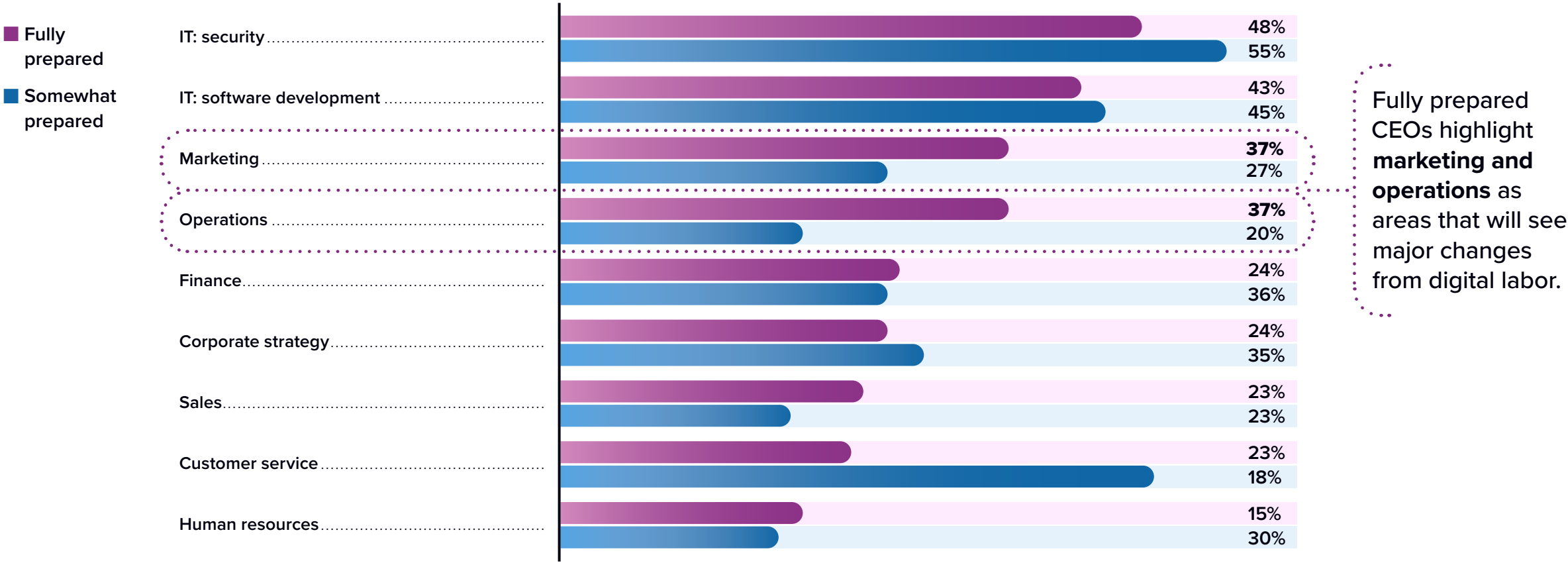
Base = CEOs in organizations who are fully prepared or somewhat prepared to initiate digital labor initiatives, n = 79 (fully prepared), n = 74 (somewhat prepared);  
 Source: IDC's CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

Contrary to the popular narrative that digital labor will take on low-value, repetitive tasks, a significant number of CEOs are saying that it will take on strategic work. This replaces the idea that digital labor is eliminating entry-level roles and instead offers a window into a future where humans and agents are co-creating to develop more robust and pressure-tested ideas.



# IT, Marketing, and Operations Will See the Most Change from Digital Labor

In which areas of your business do you expect digital labor to have the most impact?



Base = CEOs in organizations who are fully prepared or somewhat prepared to initiate digital labor initiatives, n = 79 (fully prepared), n = 74 (somewhat prepared); Source: IDC's *CEO Quick Survey — Digital Labor Research*, Sponsored by Salesforce, July 2025  
For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.



# In Their Words: CEOs Describe Digital Labor's Impact Across the Business

In your own words, if you had one wish for digital labor, what would you like it to do for your organization?

## IT SECURITY:

“Automated alerts for anomalies or breaches would help us proactively fix issues before they escalate.”

## IT SOFTWARE DEVELOPMENT:

“Make development of websites and other digital products much easier and be accurate when undergoing given tasks.”

## CUSTOMER SERVICE:

“Manage customer support 24/7 with smart, AI-powered chat solutions.”

## MARKETING:

“Optimize marketing campaigns by analyzing customer behavior and tailoring offers in real-time.”

## CORPORATE STRATEGY:

“Enhancement of the ability to assist within the organization to improve its adaptability to changes in the marketplace.”

## OPERATIONS:

“It would be great if it could automatically collect operational data from field equipment, analyze trends, and issue fault warnings.”

## FINANCE:

“Budget reviews would be easier if it pre-checked numbers and flagged anomalies before I even reviewed them.”

## SALES:

“Autonomously analyze our company's historical sales data, market trends.”

## HUMAN RESOURCES:

“Act as a smart digital assistant that answers questions, guides through HR processes, and supports onboarding without human bottlenecks”

n = 155; Source: IDC's CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025

# CEOs Fully Prepared for Digital Labor Believe It Will Create Opportunities for Employees

To what extent do you agree or disagree with the following statements about digital labor/agentic AI?

(Agree responses only)

It will spur  
**new teams**  
and departments.

FULLY PREPARED

**66%**

SOMEWHAT PREPARED

**55%**

It will empower us to  
**reassign employees**  
to new, relevant roles.

FULLY PREPARED

**66%**

SOMEWHAT PREPARED

**60%**

It will increase  
the need for **people in**  
**leadership roles.**

FULLY PREPARED

**61%**

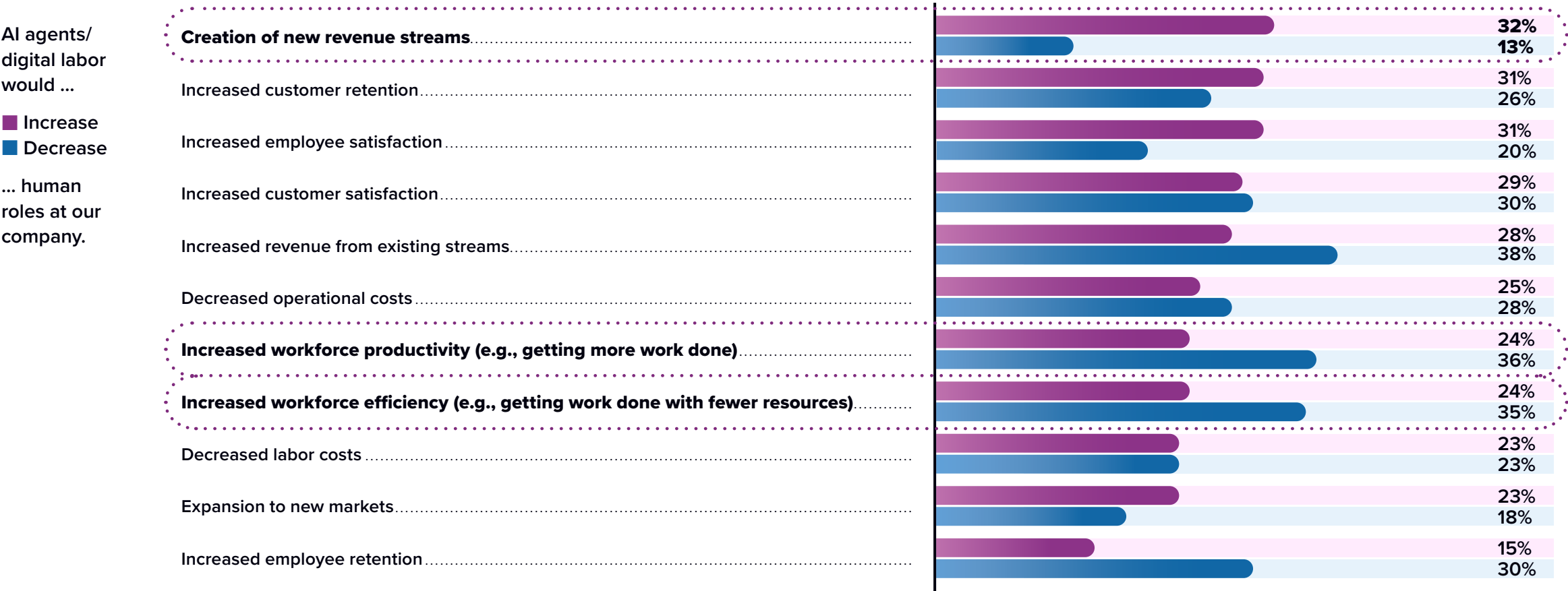
SOMEWHAT PREPARED

**55%**

Base = CEOs in organizations who are fully prepared or somewhat prepared to initiate digital labor initiatives, n = 79 (fully prepared), n = 74 (somewhat prepared); Source: IDC's *CEO Quick Survey — Digital Labor Research*, Sponsored by Salesforce, July 2025

# CEO Expectations for Digital Labor’s Workforce Impacts Depend on Overarching Goals

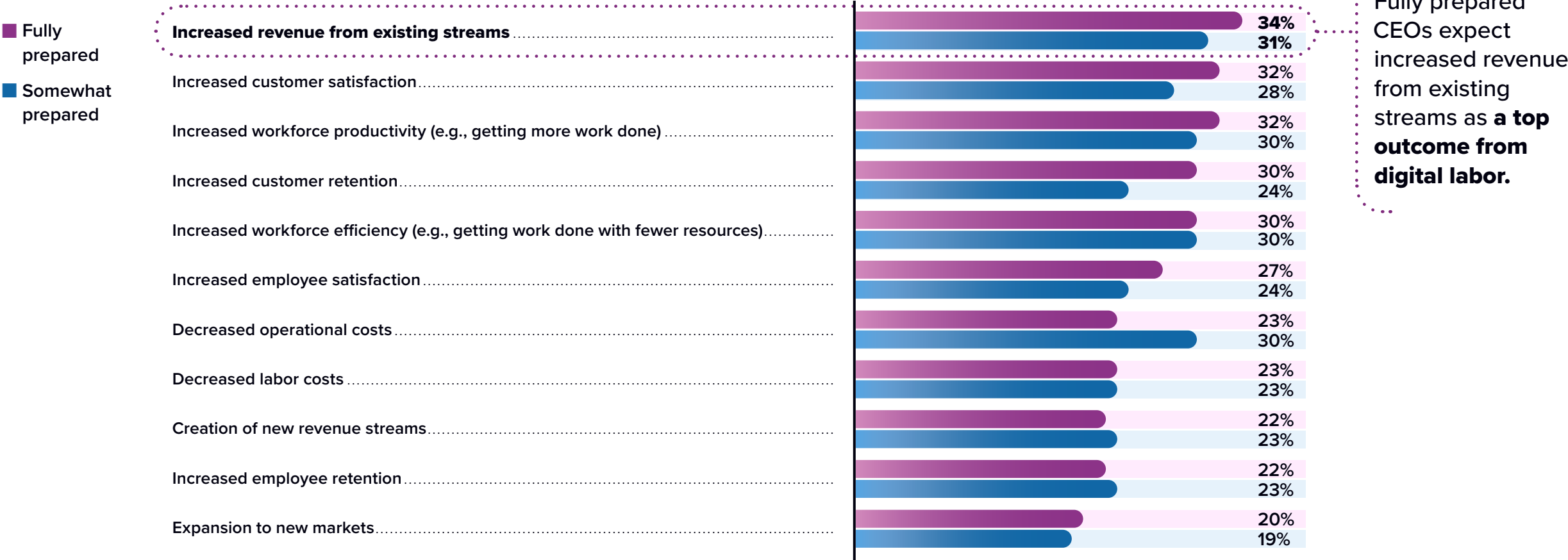
Which of the following business outcomes is your organization expecting the most from digital labor?



n = 75 (increase), n = 80 (decrease); Source: IDC’s CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025 | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

# CEOs Expect Increased Revenue as the Top Business Outcome

Which of the following business outcomes is your organization expecting the most from digital labor?

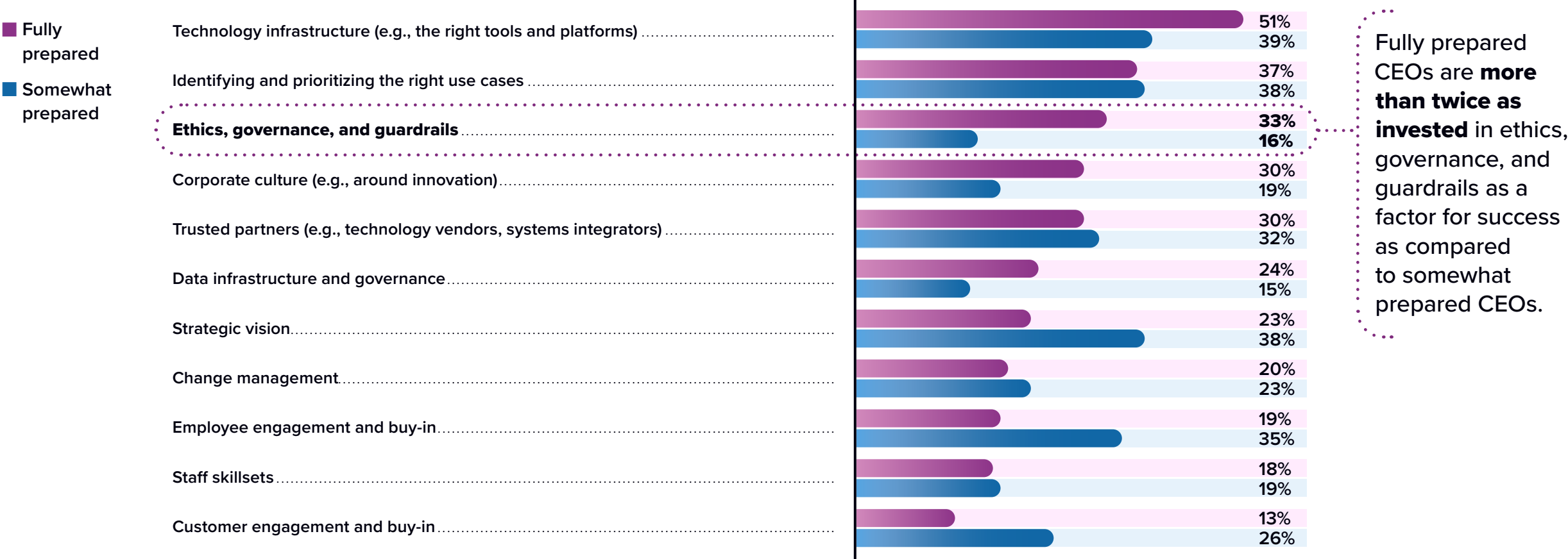


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For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.



# The Factors That Determine Digital Labor’s Success

Overall, which of the following factors do you believe are most critical for determining the success of your company’s digital labor initiatives?  
(Aggregate of rank 1, 2, 3)



Base = CEOs in organizations who are fully prepared or somewhat prepared to initiate digital labor initiatives, n = 79 (fully prepared), n = 74 (somewhat prepared); Source: IDC’s CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025  
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# Prepare to Harness the Power of Digital Labor



## **Lean into digital labor as workforce augmentation not replacement.**

CEOs who expect workforce expansion from digital labor are more focused on net new growth. By focusing on how digital labor can augment rather than replace human capabilities, organizations move beyond targeting only efficiency gains. This positions digital labor as a lever for growth and innovation, ultimately helping to drive competitive advantage.



**Keep trust at the core of workforce transformation.** Success requires grounding in empathy, disciplined organizational change management, and a clear focus on outcomes.

Leaders who are fully prepared for digital labor recognize that ethics, governance, and guardrails are key to success, and overlooking them introduces unacceptable risk.



## **Move beyond the outdated notion that digital labor is limited to routine work.**

Among CEOs who are fully prepared for digital labor, 70% believe that it will take on more strategic work than rote or routine tasks. Rather than displacing jobs, digital labor can reshape them, with two thirds of forward-thinking CEOs anticipating the emergence of new teams and departments as a direct result. This is a fundamental shift, underscoring that these CEOs see a brighter, more dynamic future for human roles.

# Appendix: Supplemental Data

The tables in this appendix provide accessible versions of the data for the complex figures in this document. Click “Return to original figure” below each table to get back to the original data figure.

SUPPLEMENTAL DATA FROM PAGE 7

Which of these stakeholder groups are pressuring you the most to implement digital labor?

Internal Influencers	
Line of business leaders	58%
CIO/technical staff	51%
CFO	48%
Board of Directors	37%

External Influencers	
Investors	23%
Partners	15%
Customers	12%
No strong pressure	3%

Note: Line-of-business leaders include, for example, CMOs and COOs. n = 155; Source: IDC’s *CEO Quick Survey — Digital Labor Research*, Sponsored by Salesforce, July 2025

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# Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 11

For each of the eight opposing statements shown, please select which one between the two will likely occur due to digital labor.

	Fully prepared	Somewhat prepared
Digital labor will take on more strategic work	70%	53%
Digital labor will take on more routine/rote tasks	30%	47%

Base = CEOs in organizations who are fully prepared or somewhat prepared to initiate digital labor initiatives, n = 79 (fully prepared), n = 74 (somewhat prepared); Source: IDC's *CEO Quick Survey — Digital Labor Research*, Sponsored by Salesforce, July 2025

[Return to original figure](#)



# Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 12

In which areas of your business do you expect digital labor to have the most impact?

	Fully prepared	Somewhat prepared
IT: security	48%	55%
IT: software development	43%	45%
Marketing	37%	27%
Operations	37%	20%
Finance	28%	27%
Corporate strategy	27%	30%
Sales	25%	19%
Customer service	24%	49%
Human resources	20%	18%

Base = CEOs in organizations who are fully prepared or somewhat prepared to initiate digital labor initiatives, n = 79 (fully prepared), n = 74 (somewhat prepared); Source: IDC's *CEO Quick Survey — Digital Labor Research*, Sponsored by Salesforce, July 2025

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# Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 15

Which of the following business outcomes is your organization expecting the most from digital labor?

	AI agents/digital labor would <b>increase</b> the number of human roles	AI agents/digital labor would <b>decrease</b> the number of human roles
Decreased operational costs	32%	13%
Decreased labor costs	31%	26%
Increased revenue from existing streams	31%	20%
Creation of new revenue streams	29%	30%
Expansion to new markets	28%	38%
Increased customer retention	25%	28%
Increased customer satisfaction	24%	36%
Increased employee retention	24%	35%
Increased employee satisfaction	23%	23%
Increased workforce productivity (e.g., getting more work done)	23%	18%
Increased workforce efficiency (e.g., getting work done with fewer resources)	15%	30%

n = 75 (increase), n = 80 (decrease); Source: IDC's CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025

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# Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 16

Which of the following business outcomes is your organization expecting the most from digital labor?

	Fully prepared	Somewhat prepared
Increased revenue from existing streams	34%	31%
Increased customer satisfaction	32%	28%
Increased workforce productivity (e.g., getting more work done)	32%	30%
Increased customer retention	30%	24%
Increased workforce efficiency (e.g., getting work done with fewer resources)	30%	30%
Increased employee satisfaction	27%	24%
Decreased operational costs	23%	30%
Decreased labor costs	23%	23%
Creation of new revenue streams	22%	23%
Increased employee retention	22%	23%
Expansion to new markets	20%	19%

n = 75 (increase), n = 80 (decrease); Source: IDC's CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025

[Return to original figure](#)

# Appendix: Supplemental Data (continued)

SUPPLEMENTAL DATA FROM PAGE 17

Overall, which of the following factors do you believe are most critical for determining the success of your company’s digital labor initiatives?

(Aggregate of rank 1, 2, 3)

	Fully prepared	Somewhat prepared
Technology infrastructure (e.g., the right tools and platforms)	51%	39%
Identifying and prioritizing the right use cases	37%	38%
Ethics, governance, and guardrails	33%	16%
Corporate culture (e.g., around innovation)	30%	19%
Trusted partners (e.g., technology vendors, systems integrators)	30%	32%
Data infrastructure and governance	24%	15%
Strategic vision	23%	38%
Change management	20%	23%
Employee engagement and buy-in	19%	35%
Staff skillsets	18%	19%
Customer engagement and buy-in	13%	26%

n = 75 (increase), n = 80 (decrease); Source: IDC’s CEO Quick Survey — Digital Labor Research, Sponsored by Salesforce, July 2025

[Return to original figure](#)



# About the IDC Analysts

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Worldwide C-Suite and Digital Business Research, IDC

Tony Olvet is group vice president of Worldwide C-Suite and Digital Business Research at IDC. His team's global research focuses on the connection between business transformation and digital investments across enterprises. Olvet's analysis and insights help vendors, IT professionals, and business executives make fact-based decisions on technology strategy and digital business.

[More about Tony Olvet](#)**Teodora Snoddy**

Research Manager,  
C-Suite Tech Agenda, IDC

Teodora Snoddy is a research manager for the Worldwide C-Suite Tech Agenda program. Her responsibilities focus on creating research that assesses technology spending and buyer preferences across the C-Suite. This research covers the emerging trends around C-Suite technology objectives. Snoddy's analysis helps technology vendors, IT professionals, and business executives make informed and data-driven decisions on technology strategy.

[More about Teodora Snoddy](#)

# Message from the Sponsor



## Becoming an Agentic Enterprise

Digital labor underpinned by AI agents can empower businesses to unlock exponential growth despite static budgets and overextended teams. Companies that realize this goal are Agentic Enterprises — where humans and AI agents work together to achieve better business outcomes by automating repetitive tasks and allowing teams to focus on higher-value work.

Successful companies will start this journey with a strategic mindset that includes:

- ▶ A vision for their AI-powered future
- ▶ A prepared and empowered workforce
- ▶ The right use cases
- ▶ A trusted data foundation

**Begin your journey with Salesforce's step-by-step guide to becoming an Agentic Enterprise.**

[Get the playbook](#)

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