

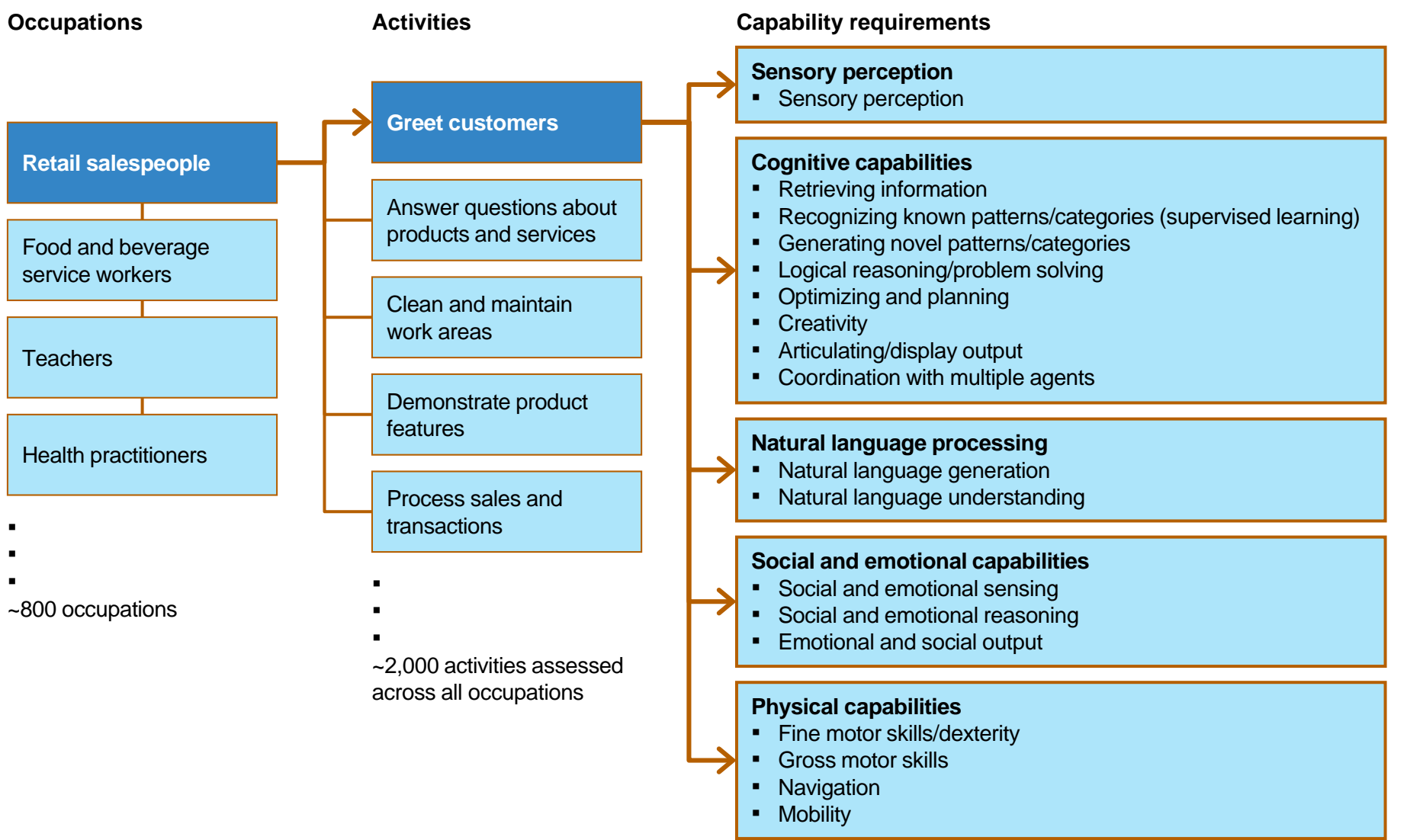
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Jobs lost, jobs gained: Workforce transitions in a time of automation

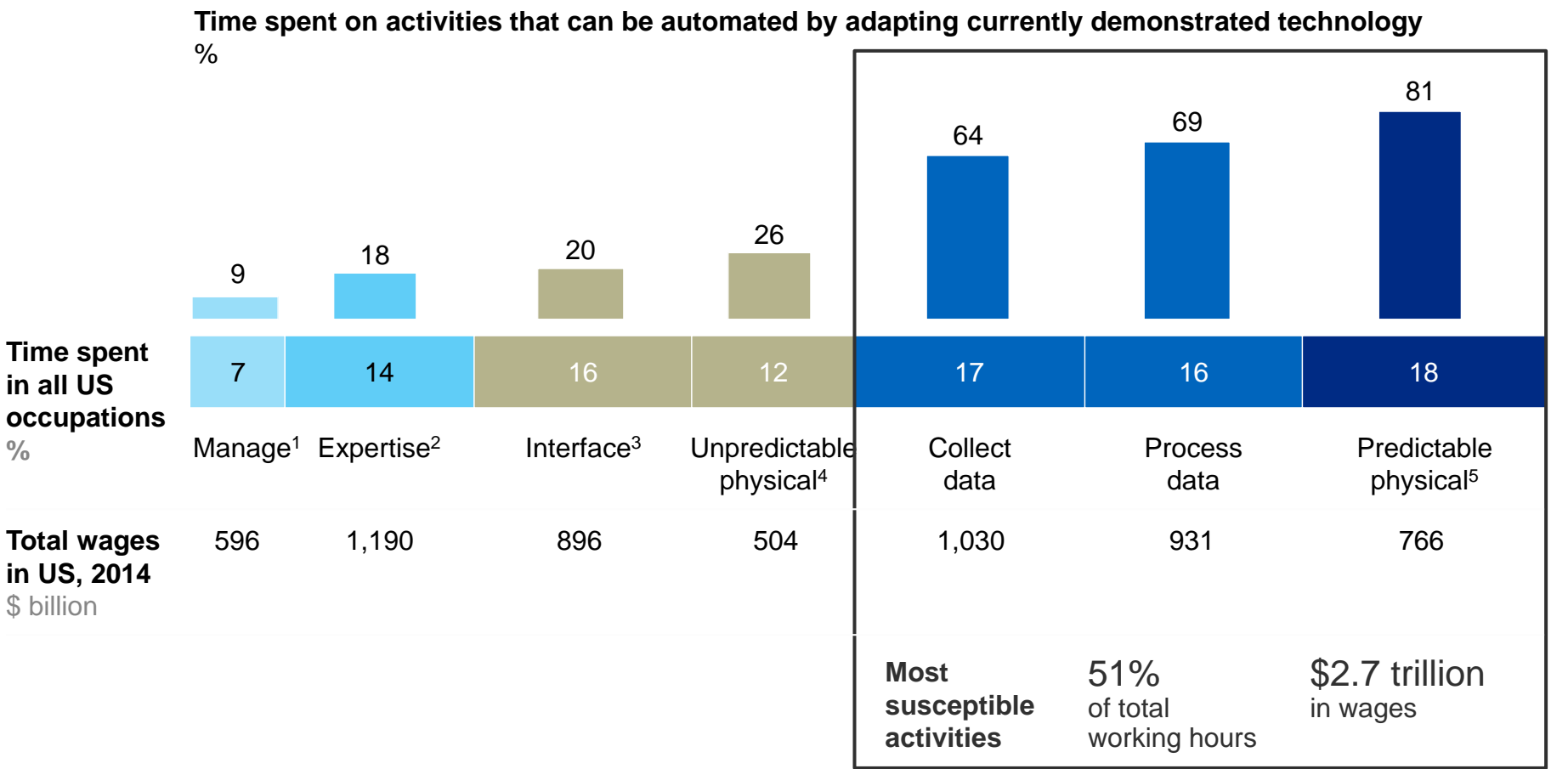
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To assess the technical potential of automation, we structure our analysis around 2,000 distinct work activities



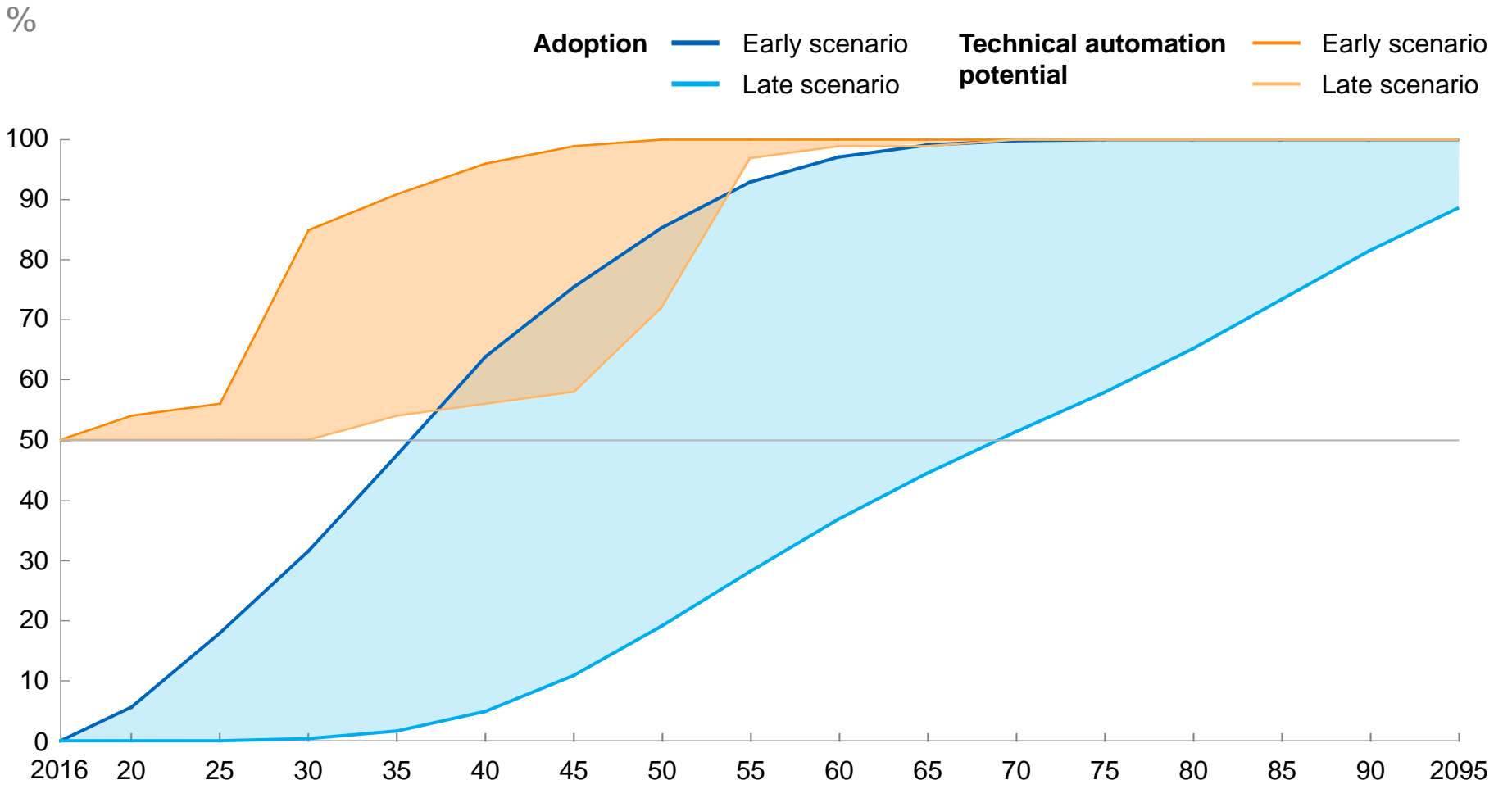
Three categories of work activities have significantly higher technical automation potential



1 Managing and developing people.
2 Applying expertise to decision making, planning, and creative tasks.
3 Interfacing with stakeholders.
4 Performing physical activities and operating machinery in unpredictable environments.
5 Performing physical activities and operating machinery in predictable environments.
NOTE: Numbers may not sum due to rounding.

Automation will be a global force, but adoption will take decades and there is significant uncertainty on timing

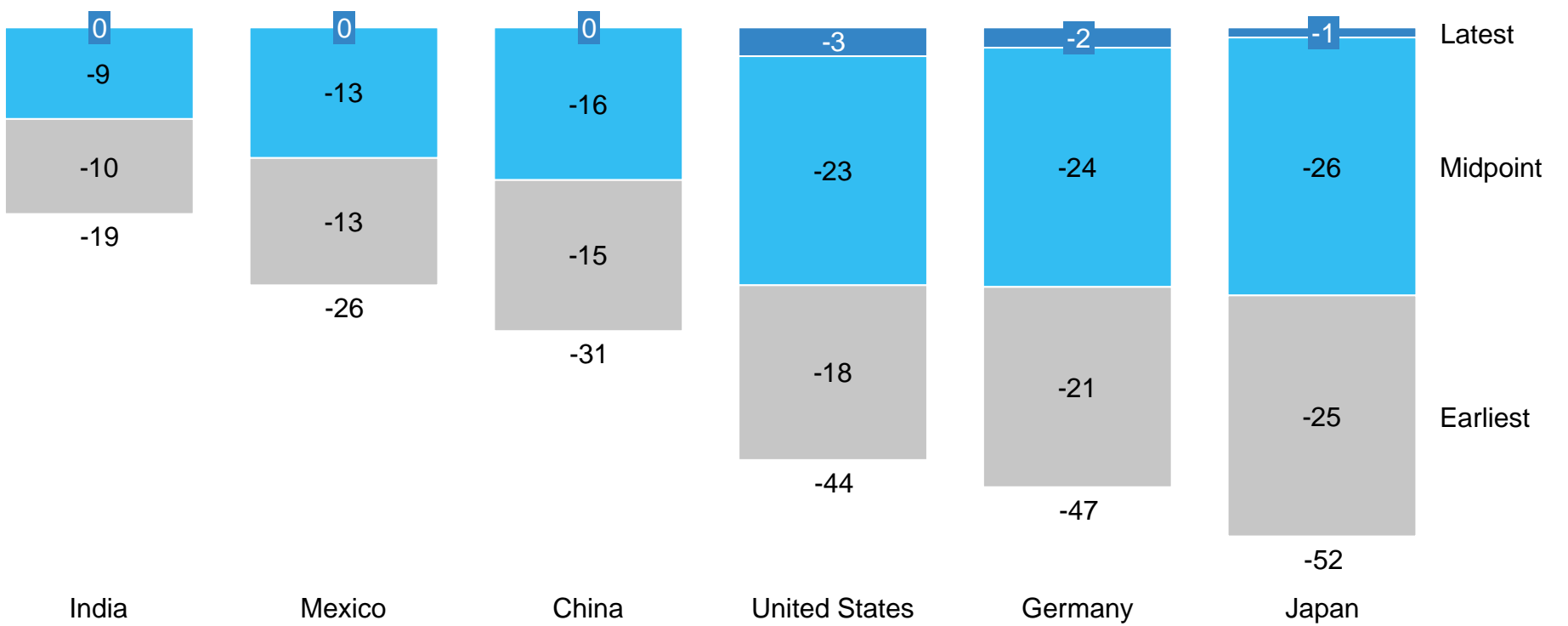
Time spent on current work activities¹



¹ Forty-six countries used in this calculation, representing about 80% of global labor force.

By 2030, in the midpoint adoption scenario, automation could replace as high as 19–52% (in the earliest adoption scenario) and as low as 0–3% (in the latest adoption scenario) of current work in a set of focus countries,

Projected impact on total employment in midpoint automation scenario, 2016–30
% of FTE hours with potential to be automated, midpoint scenario (range of automation scenarios, latest to earliest)

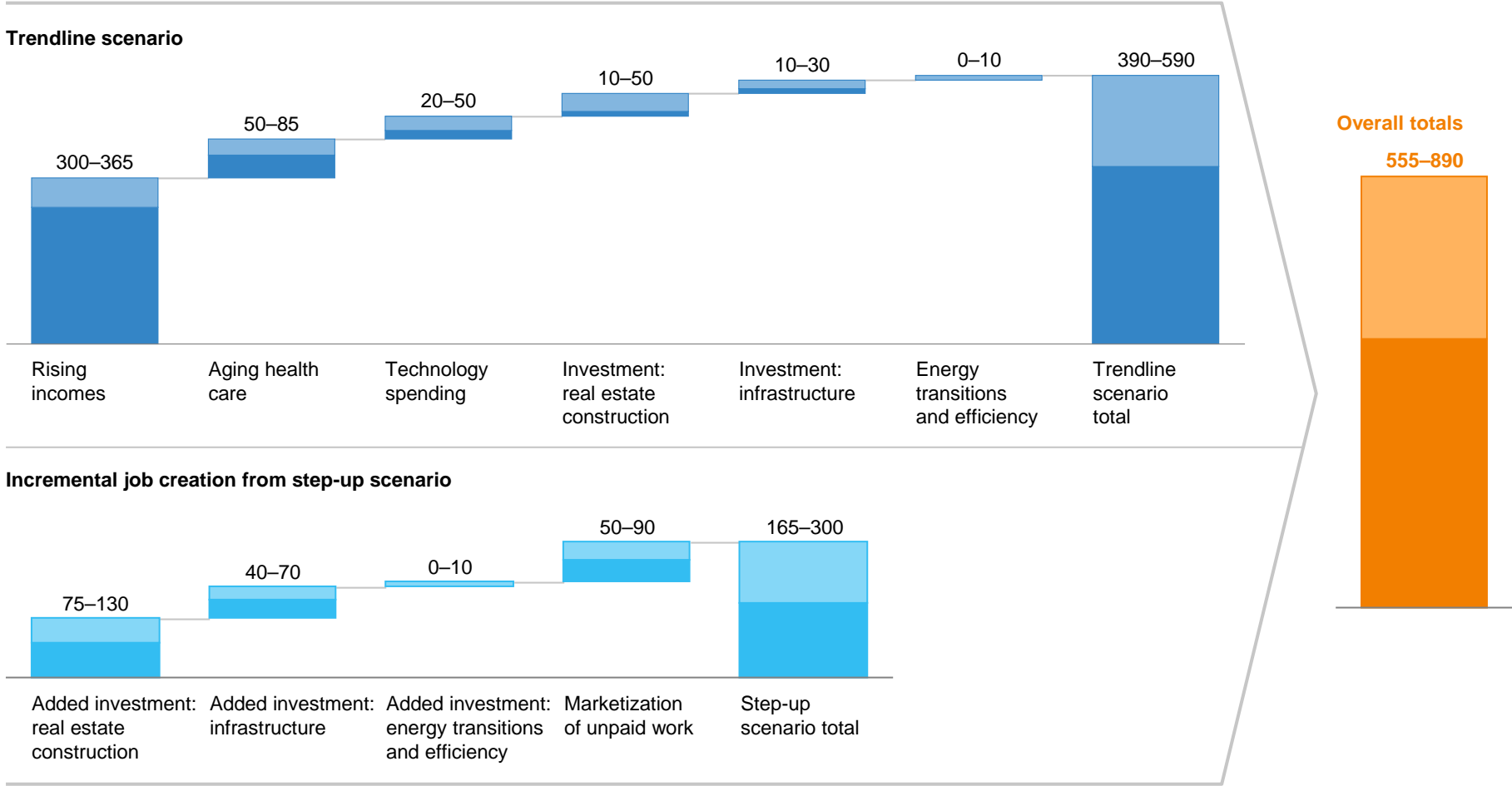


NOTE: Numbers may not sum due to rounding.
SOURCE: McKinsey Global Institute analysis

Rising consumer incomes are the largest source of job creation among our seven catalysts

Potential jobs created from seven catalysts of labor demand, midpoint automation, 2016–30¹

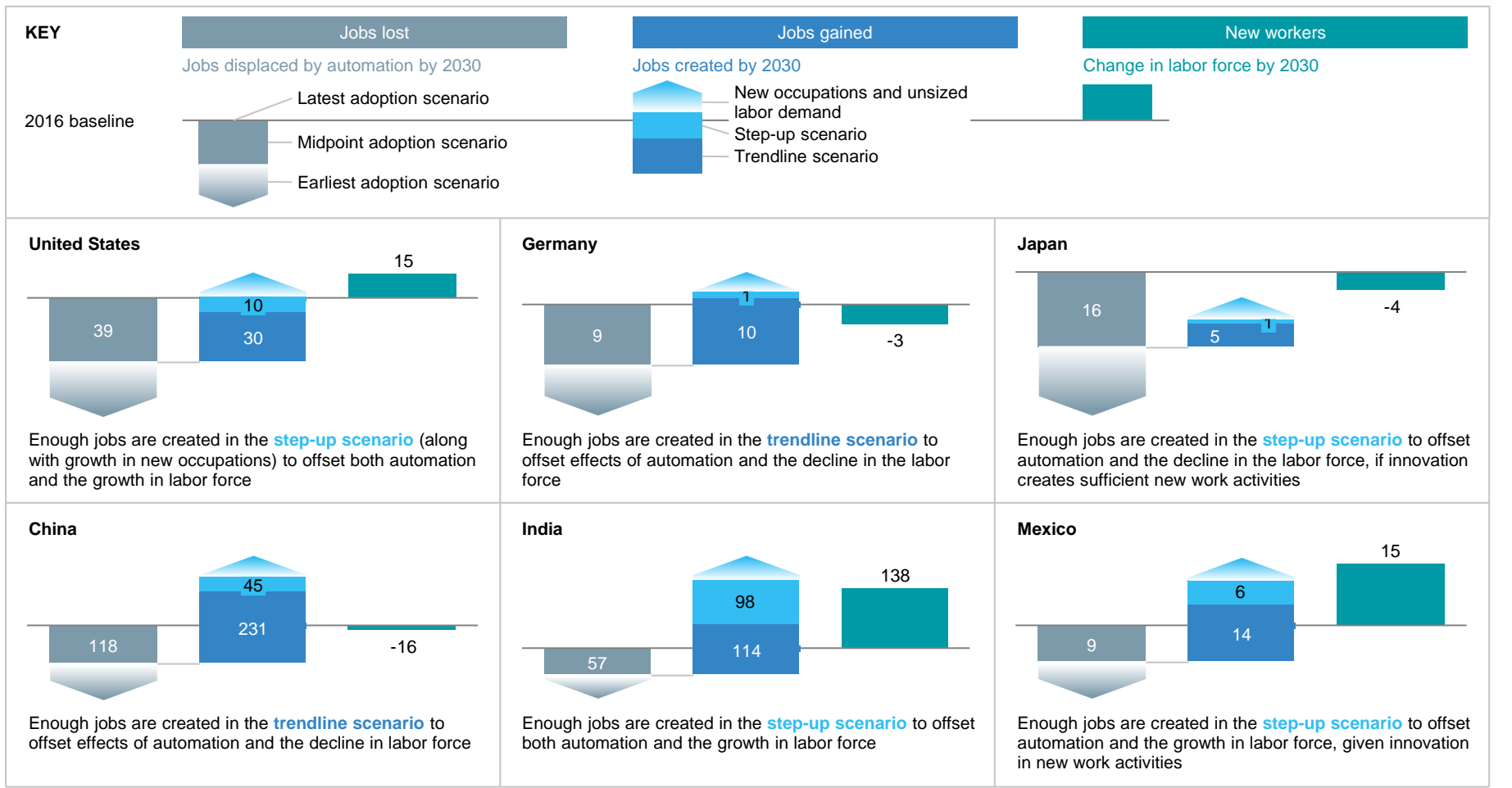
Million FTEs, ranged low–high



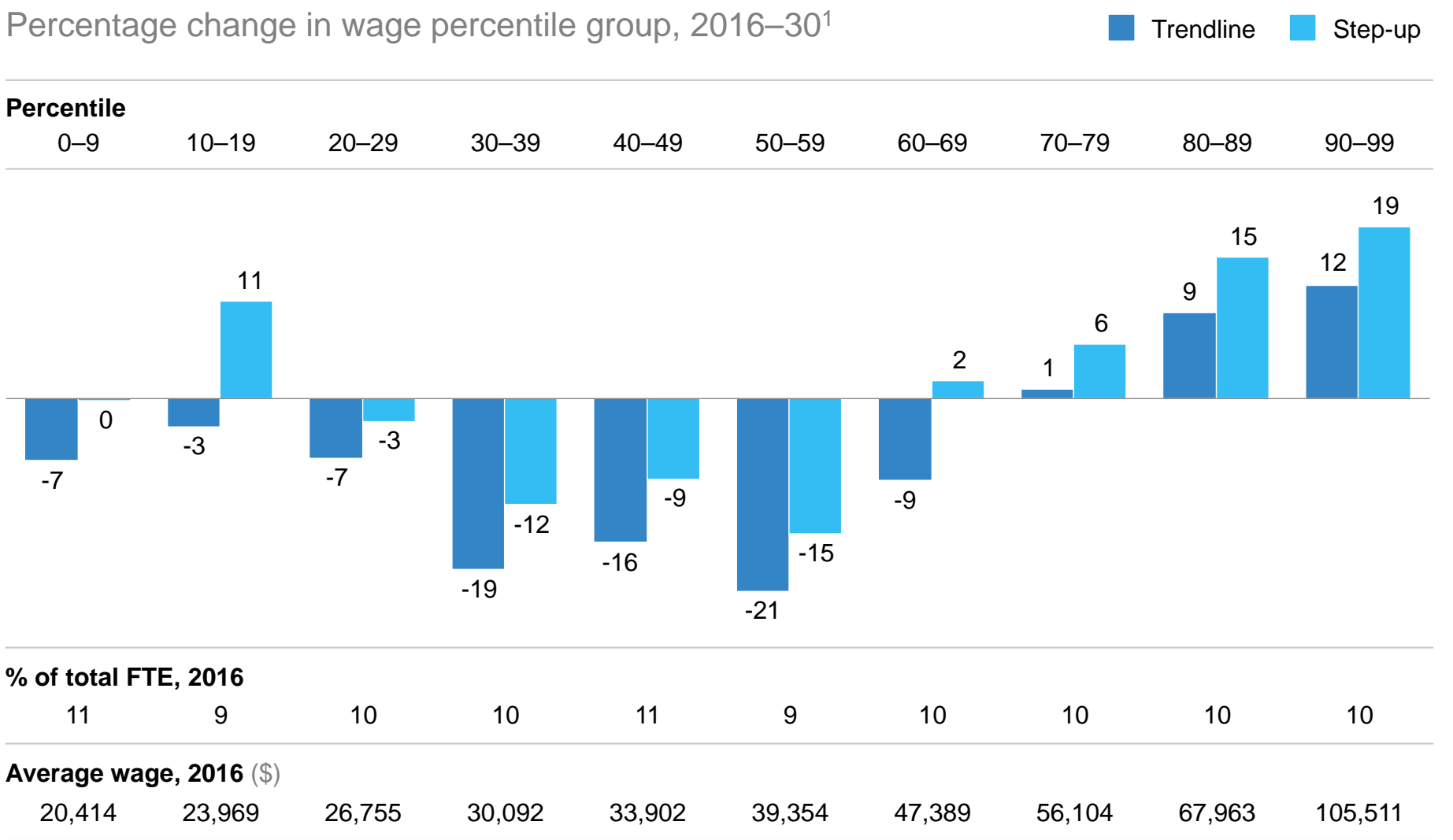
¹ Some occupational data projected into 2016 baseline from latest available 2014 data.

Jobs lost, jobs gained: Automation, new job creation, and change in labor supply, 2016–30

Range of automation scenarios and additional labor demand from seven catalysts



In the modeled U.S. scenarios, current high wage occupations see the most growth and middle wage occupations decline the most



1 Numerator: net change; denominator: 2030 scaled FTE in the given wage percentile bucket. Some occupational data projected into 2016 baseline from latest available 2014 data.

SOURCE: McKinsey Global Institute analysis

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