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Preparing Australia's Workforce for Generative AI

Prepared by Mandala

Report – March 2024

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This study leverages LinkedIn's Economic Graph data to examine the potential influence of generative AI on the Australian workforce.

It is intended to supplement the existing literature for policymakers, companies, and workers to enhance their strategic approach to planning for and acquiring new skills, as well as reskilling and upskilling in AI technologies.

- The purpose of this study is to examine the potential influence generative artificial intelligence (AI) could have on Australia's workforce. We do this by leveraging data from LinkedIn's Economic Graph to understand how generative AI affects the skills that are used in each occupation.
- This analysis only considers the skills composition for a role and does not factor in how much time an individual in an occupation spends using a skill.
- LinkedIn's Economic Graph data, which provides a unique digital representation of the global economy, was used to identify the skills that could potentially be complemented and disrupted by new technologies, including generative AI.
 - LinkedIn has more than 1 billion members in 200 countries globally, and over 14 million members in Australia.
 - There are 41,000 skills in LinkedIn's skills taxonomy, with 121 considered AI skills, including machine learning, natural processing, and deep learning.
 - Globally, AI talent is still less than 2 per cent of LinkedIn members.

Executive summary

Generative AI will change the skills composition of Australian workers

It was not long ago that the world was talking about AI and automation, and its potential impact on the global economy. Fast forward to 2024, generative artificial intelligence (GAI) has emerged as a new technology and tool at the disposal of everyone. Generative AI is a subset of machine learning using foundation models that specialises in generating output based on training data and user input. The process utilises deep learning to analyse patterns within extensive datasets and uses this to generate output.

Generative AI can have a profound impact on the Australian economy and workforce. It has the potential to usher in new business models, replace or augment tasks, and transform the way people work to generate significant benefits. However, realising these benefits hinges on addressing challenges and barriers associated with the adoption of generative AI.

To identify the potential impact of generative AI on the Australian workforce, we have leveraged LinkedIn's Economic Graph data to understand what skills could be replicated by generative AI and what skills would need to be performed by a

human but could be complemented with generative AI. Based on this skills-based framework, jobs can be classified into three categories: (1) Augmented: jobs where the core skills include a large share of both GAI-replicable and GAI-complementary skills; (2) Disrupted: jobs where the core skills include a large share of GAI-replicable and a relatively low share of GAI-complementary skills; and (3) Insulated: jobs that have a relatively small proportion of GAI-replicable skills in their core skills.

Jobs that require specialised skills, such as healthcare professionals, are typically insulated from generative AI as they rely on complex nuanced human judgments and interactions. Meanwhile, jobs that involve more routine skills, such as cashiers and legal associates, are more susceptible to being augmented and disrupted by generative AI.

Generative AI will transform the workplace for 7.2 million workers by creating opportunities for productivity gains

There are 7.2 million workers who will need to re-skill and adapt to the potential impact of generative AI. This makes up 50 per cent of Australia's workforce. Of these workers, 3.3 million will have their roles

augmented by generative AI, while 3.9 million workers will have their roles disrupted. The remaining 7.1 million workers will be relatively insulated from the effects of generative AI.

The effects of generative AI however are not equally distributed across Australia's workforce. Australian workers that are more likely to be augmented or disrupted by generative AI are professionals, women, young, and have a tertiary education.

The influence of generative AI varies by industry, largely touching service-related industries which are key sources of employment

While the influence of generative AI is seen at the skills level, and therefore occupations, it will also have a varying degree of influence by industry. Industries that are most likely to be affected by generative AI typically have a higher share of women workers and are large sources of employment that have been growing in recent years.

While there are significant benefits to be realised from the application of generative AI, its application requires a nuanced approach to mitigating any challenges.



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Generative AI will change the skills composition of Australian workers



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The impact of generative AI varies by industry, largely touching service-related industries which are key sources of employment



Generative AI is a machine learning model that generates output based on training data and user input

Generative AI (GAI) is a subset of machine learning that specialises in generating output based on training data and user input. The process utilises deep learning to analyse patterns within extensive datasets and draws on these patterns to generate output.

Generative AI can have a profound impact on the Australian economy and workforce. It has the potential to usher in new business models, replace or augment tasks, and transform how it is created. Indeed, by transforming the core skills required for many occupations, generative AI is accelerating a shift to a skills-based labour market. Implicit in the acceleration is a concurrent rise in productivity gains, as workers can begin shifting their focus away from more routine tasks and into more productive areas.

While it is too early to recognise the full impact of GAI on the labour market or measure productivity gains in specific roles, what is certain is that GAI will lead to a shift in many of the skills underpinning most occupations. The impact GAI has on industries and workers' skills can contribute \$45 – 115 billion in value to the Australian economy by 2030.¹

Exhibit 1: Definitions of generative AI

 Source		 Definition	 Key features
Harvard Business Review		Generative AI is a software that uses complex machine learning models to predict the next word based on previous word sequences or the next image based on descriptions of images	<i>Predictive AI algorithm</i>
World Economic Forum		Generative AI is a category of AI algorithms that generates outputs based on the data they have been trained on. Unlike traditional AI algorithms that recognise patterns, generative AI creates output	<i>Creates output based on training data</i>
Henrik Skaug Sætra		Generative AI is here used as an umbrella term to describe machine learning solutions trained on massive amounts of data in order to produce output based on user prompts (input in the form of commands)	<i>User directed</i>



Generative AI is a predictive AI algorithm that creates output from training based on input and directions from the user

Note: This page includes a non-exhaustive list of definitions on generative AI.
1 Estimate derived from Microsoft & Tech Council of Australia (2023) *Australia's Generative AI opportunity*
Source: Harvard Business Review (2022) *How Generative AI is Changing Creative Work*; Henrik Skaug Sætra (2023) *Generative AI: Here to stay, but for good?*; LinkedIn Economic Graph (2023) *Preparing the Workforce for Generative AI*; World Economic Forum (2023) *What is generative AI? An AI explains*; Mandala analysis.

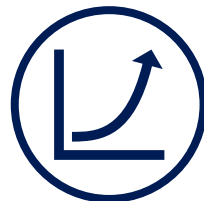
Generative AI can enhance the skills and work opportunities for Australians, however there are barriers to adoption that need to be addressed to realise these benefits

Exhibit 2: Implications of the impact of generative AI



GAI enhances workers' skills and capabilities, resulting in improved productivity

- GAI can augment workers' capabilities by automating work activities that take up to 60-70 per cent of workers' time¹
- GAI can improve productivity by accelerating routine tasks, including writing emails, analysing data, coding, and summarising documents
- Software engineers coded 2x as fast using an AI-based tool



GAI will present emerging opportunities for jobs and workers

- From December 2022 to September 2023, applications to AI and AI-related job postings in Australia increased by 16 per cent
- Since December 2022, the top 5 industries demanding AI related roles in Australia include: Professional Services; Administrative and Support Services; Government Administration; Manufacturing and Retail
- AI has the potential to narrow skill and labour gaps, opening new opportunities for automation and more efficient use of the limited workforce



However, potential challenges lie ahead

- LinkedIn's Economic Graph insights suggest that today, 55% of LinkedIn members globally stand to be disrupted or augmented by GAI, and the skill sets required for jobs will change by an average of 68% by 2030
- While both men and women feel equally overwhelmed (39%) by the amount of change AI may bring to their jobs, in Australia, men are 1.4x more likely than women to be interested in learning AI skills
- To fully realise the skills-based productivity gains from GAI, investment in complementary inputs, such as managerial changes, training, and business processes will be required

¹ McKinsey & Company (2023) *The economic potential of generative AI*.

Source: Australian Government Productivity Commission (2024) *Making the most of the AI opportunity*; World Economic Forum (2023) *Jobs of Tomorrow*; LinkedIn (2023) *Future of Work Report: AI at Work*; McKinsey & Company (2023) *The economic potential of generative AI*; Mandala analysis.

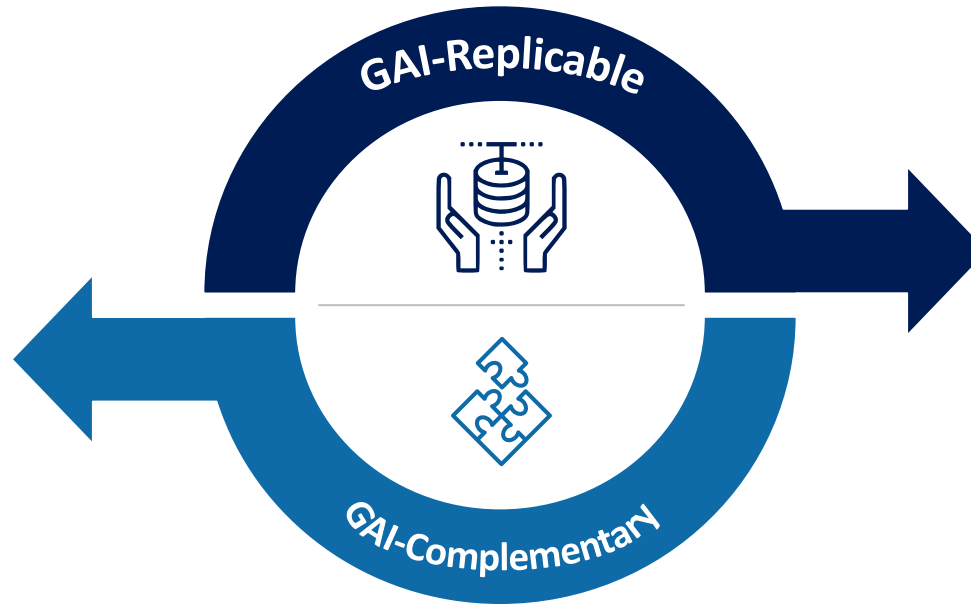
While some skills can be replicated by generative AI, other skills will be exclusively performed by people and complemented by generative AI

Exhibit 3: Skills impact from generative AI

GAI-complementary skills are skills that inherently rely on human proficiency and can complement GAI technologies. Approximately 800+ skills currently exclusively performed by people serve as complements to GAI – enriching human-technology collaboration and contribution to overall efficiency.

The most frequently added **GAI-complementary skills** among LinkedIn members are:

- **Communication & Media skills** – oral presentations, influencing
- **Business & Industry skills** – entrepreneurship, maintenance and repair, military strategy
- **Engineering skills** – software innovation, product innovation
- **People skills** – leadership, teamwork, negotiation, problem-solving, people management, relationship building, creativity, emotional intelligence



GAI-replicable skills are skills that can be effectively performed by Generative AI (GAI) technologies, potentially replacing human labour in certain tasks. LinkedIn's taxonomy of approximately 41,000 skills identifies 500+ skills that are most likely replicable by GAI.

The most frequently added **GAI-replicable** skills by LinkedIn users are:

- **Communication & Media skills** – writing, editing, documentation, translation, video, photography, music, content creation
- **Business & Industry skills** – financial reporting, email marketing, data analysis
- **Engineering skills** – software development tools, programming languages, data science
- **People skills** – time management tools

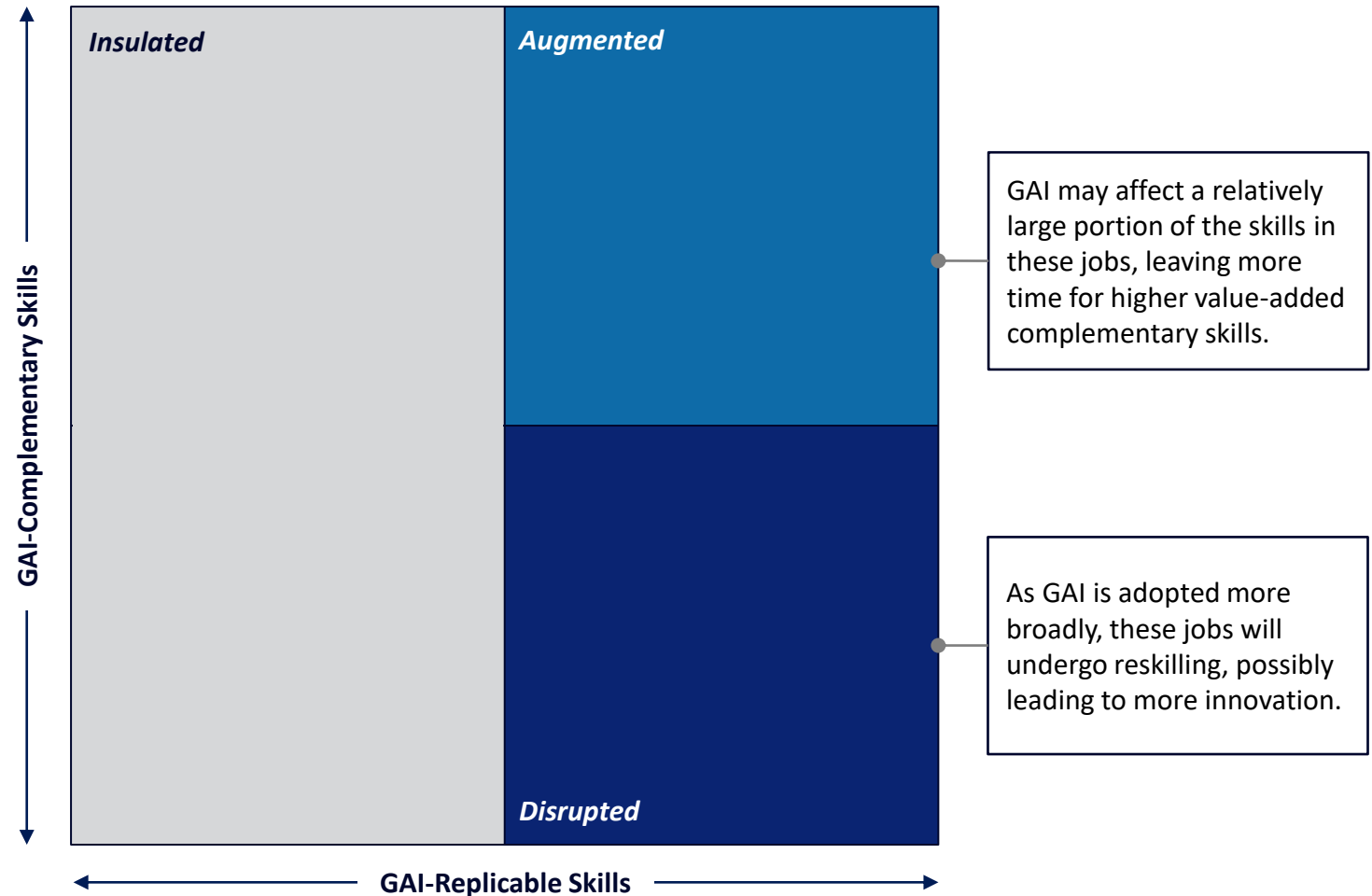
Using this skills-based framework, occupations can be classified as augmented, disrupted or insulated by GAI

Generative AI is anticipated to have a widespread impact of the workforce, as it introduces changes in job roles by streamlining routine tasks and emphasising the significance of other skills. Nevertheless, no occupation has been identified as having all their skills affected by GAI.

Occupations fall into three categories:

- **Augmented:** These jobs' core skills include a large share of both of GAI-replicable and GAI-complementary skills
- **Disrupted:** These jobs' core skills include a large share of GAI-replicable and a relatively low share of GAI-complementary skills.
- **Insulated:** These jobs have a relatively small proportion of GAI-replicable skills in their core skills

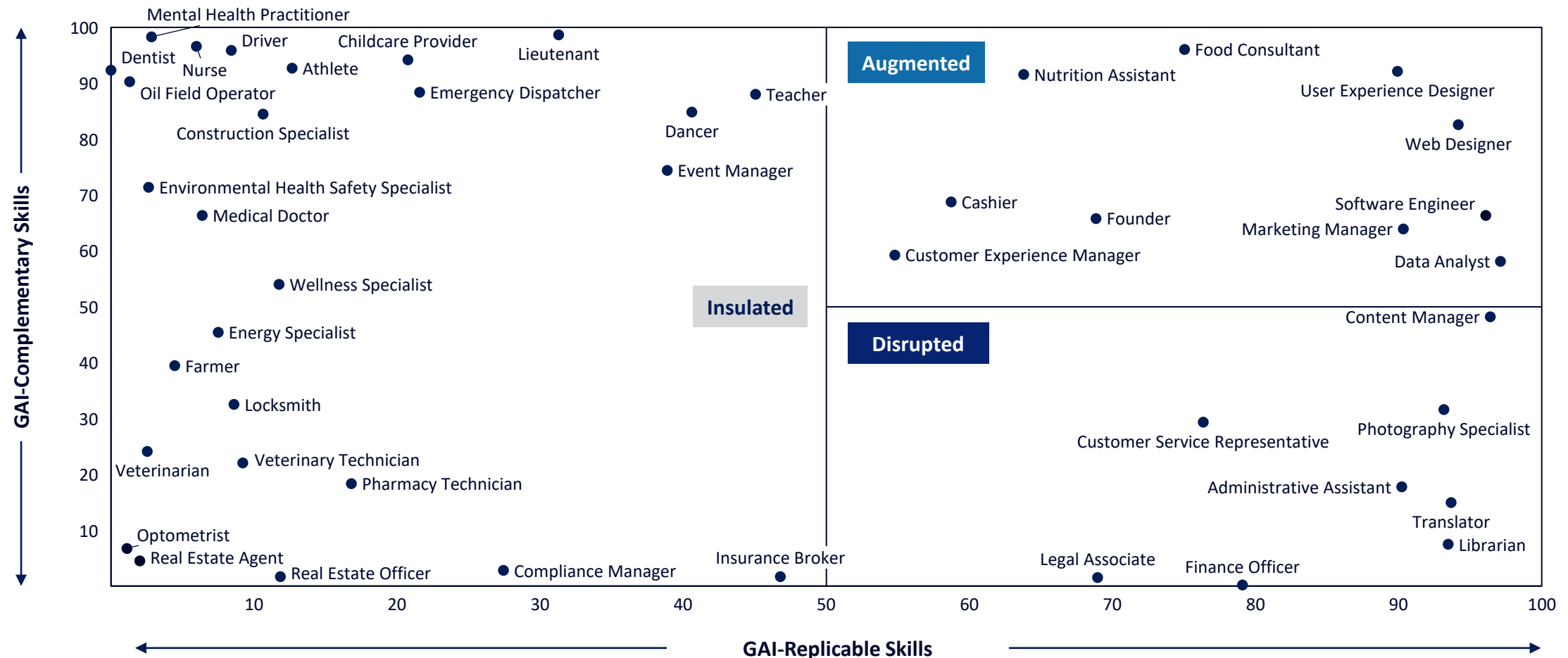
Exhibit 4: Occupations can be classified into three groups based on how replicable and complementary its skills are with generative AI



Specialist jobs, such as healthcare professionals, are typically insulated from generative AI, while jobs requiring more routine skills are more likely to be affected

Exhibit 5: Occupational composition by GAI-replicable and GAI-complementary skills^{1,2}

Y-axis: Normalised % of skills that are GAI-complimentary; X-axis: Normalised % of skills that are GAI-replicable



¹ The listed occupations are derived from the U.S. Bureau of Labor Statistics and are not exhaustive.
² Source: LinkedIn Economic Graph data; Mandala analysis.

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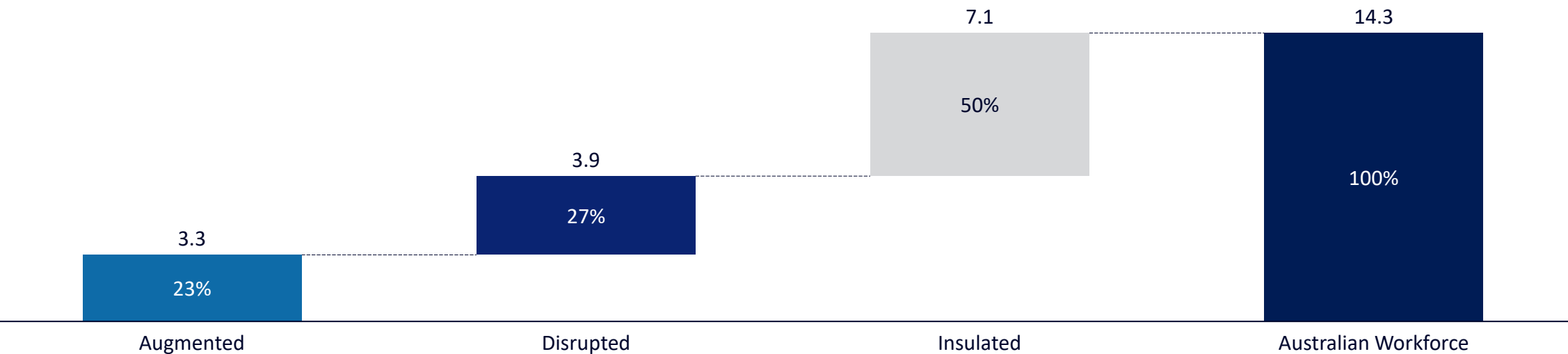
The impact of generative AI varies by industry, largely touching service-related industries which are key sources of employment



There are 7.2 million workers (50% of the Australian workforce) who will experience a shift in the skills need for their roles

Exhibit 6: Australian workers by potential impact of generative AI¹

Millions of employed workers in Australia, 2024



7.2 million workers will need to adapt to the potential impact of generative AI

There are 3.3 million Australians whose skills are predominantly complemented by generative AI. These workers will utilise existing skills to shift their focus to greater-value tasks.

There are 3.9 million Australians whose skills are predominantly replicable by generative AI. Over time, these workers may need to reskill and focus on alternative skills.

7.1 million workers are relatively protected from the influence of GAI

There are 7.1 million Australians that are relatively unaffected and will likely continue carrying out their roles as they have before.

¹ The chart's data is based on the application of LinkedIn Australia's proportions to ABS data.
Source: ABS (2024) *Labour Force, Australia, Detailed*; LinkedIn's Economic Graph data; Mandala analysis.

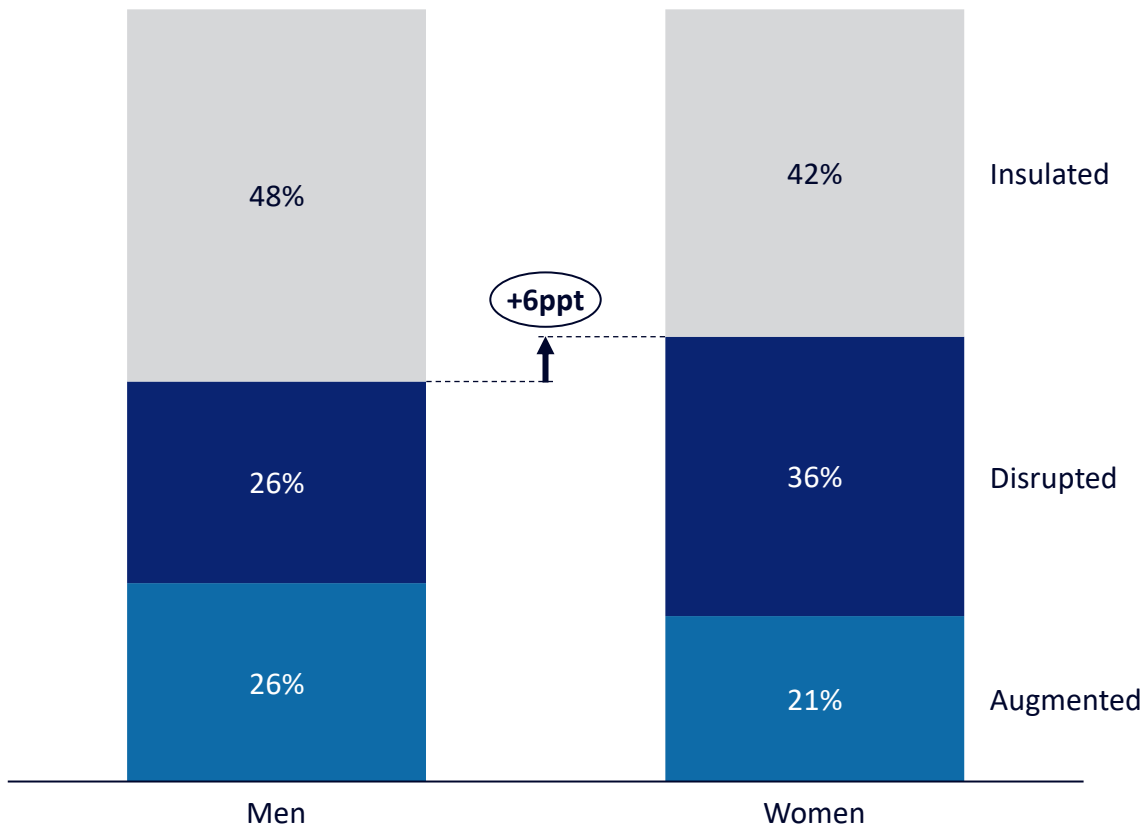
Women are more likely to be disrupted by generative AI than men

Women in the Australian workforce are more likely to be affected by generative AI, with a higher proportion disrupted rather than augmented, compared to men.

The gender disparity is partly underpinned by occupational segregation, where men and women are disproportionately represented across different job categories – which influences the extent of the impact of generative AI. Women tend to be overrepresented in roles more susceptible to disruption by generative AI, such as Medical Administrative Assistant and Legal Assistant, whereas men are overrepresented in roles potentially augmented by generative AI, such as Electrical and Mechanical Engineer.

Women tend to have a higher share of soft skills than men. LinkedIn’s Economic Graph data finds that globally, 13.6 per cent of women’s skills are soft skills, compared to 10.5 per cent for men. In Australia, women’s average share of soft skills is 13.2 per cent as compared to 10.3 per cent for men.¹ As companies increasingly seek talent that can combine people skills with AI literacy and tools, the demand for these skills may begin to see an increase.

Exhibit 7: Impact of generative AI by gender
% of Australian workforce in category, 2024



Note: LinkedIn and Mandala both recognise that gender identity is not binary. If not explicitly self-identified, we have inferred the gender of members included in this analysis either by the pronouns used on our members' LinkedIn profiles or inferred based on first name. Members whose gender could not be inferred as either man or woman were excluded from this analysis.
1 LinkedIn Economic Graph (2024) *Gender Differences in Skills: Global Differences in Shares of Types of Skills*.
Source: ABS (2024) *Labour Force, Australia, Detailed*; LinkedIn Economic Graph (2023) *Preparing the Workforce for Generative AI*; LinkedIn Economic Graph data; Mandala analysis.

Younger workers are most affected as they are typically in junior roles that require mostly GAI-replicable skills

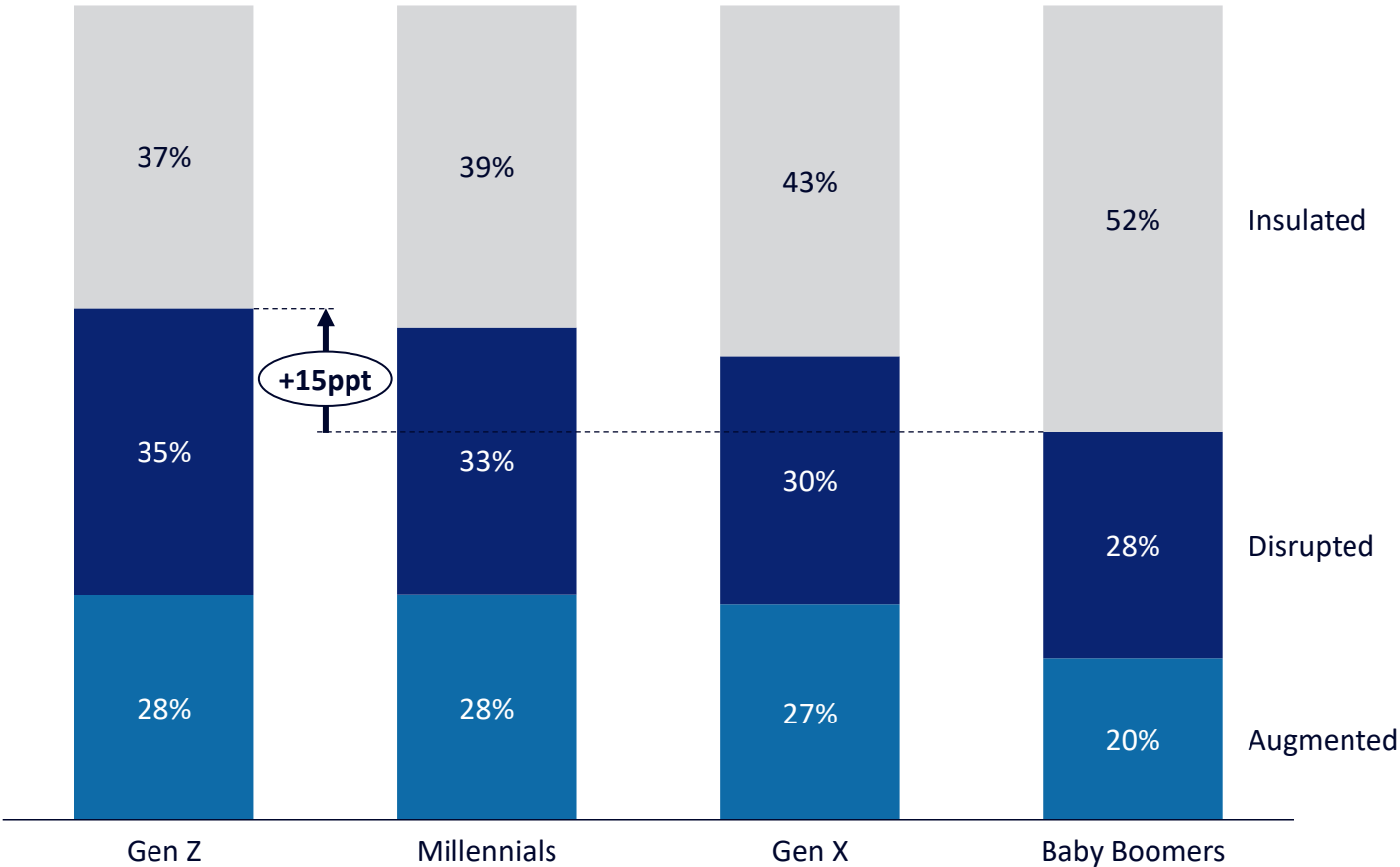
In the Australian workforce, Gen Z appears to be the most affected age group, experiencing the highest level of disruption and a 15 per cent greater impact by generative AI compared to Baby Boomers.

The result is likely due to greater representation in roles that require GAI-replicable skills. Jobs predominantly held by Gen Z, such as Clinical Research Assistant and Industrial Design Specialist, are more prone to experiencing disruption by generative AI.

Conversely, roles demanding GAI-complementary skills often remain in the domain of more experienced professionals. With more career experience, Baby Boomers tend to be relatively overrepresented in more senior positions that are generally insulated from generative AI, such as Board Member and Managing Partner, roles.

A comparison with data from the United States underscores similar trends across age groups, with Gen Z experiencing both higher augmentation and disruption compared to Baby Boomers. Despite the disparity between the age groups, younger workers possess a distinct advantage – they are the generation closest to being AI literate. Additionally, they have more time in their career to undergo upskilling and adapt to the evolving demands of emerging technologies.

Exhibit 8: Impact of generative AI by age group¹
% of Australian workforce in category, 2024



¹ Boomers are born between 1946-1964; Gen X are born between 1965-1980; Millennials are born between 1981-1996; Gen Z are born between 1997-2012.
Source: LinkedIn Economic Graph (2023) *Preparing the Workforce for Generative AI*; LinkedIn Economic Graph data; Mandala analysis.

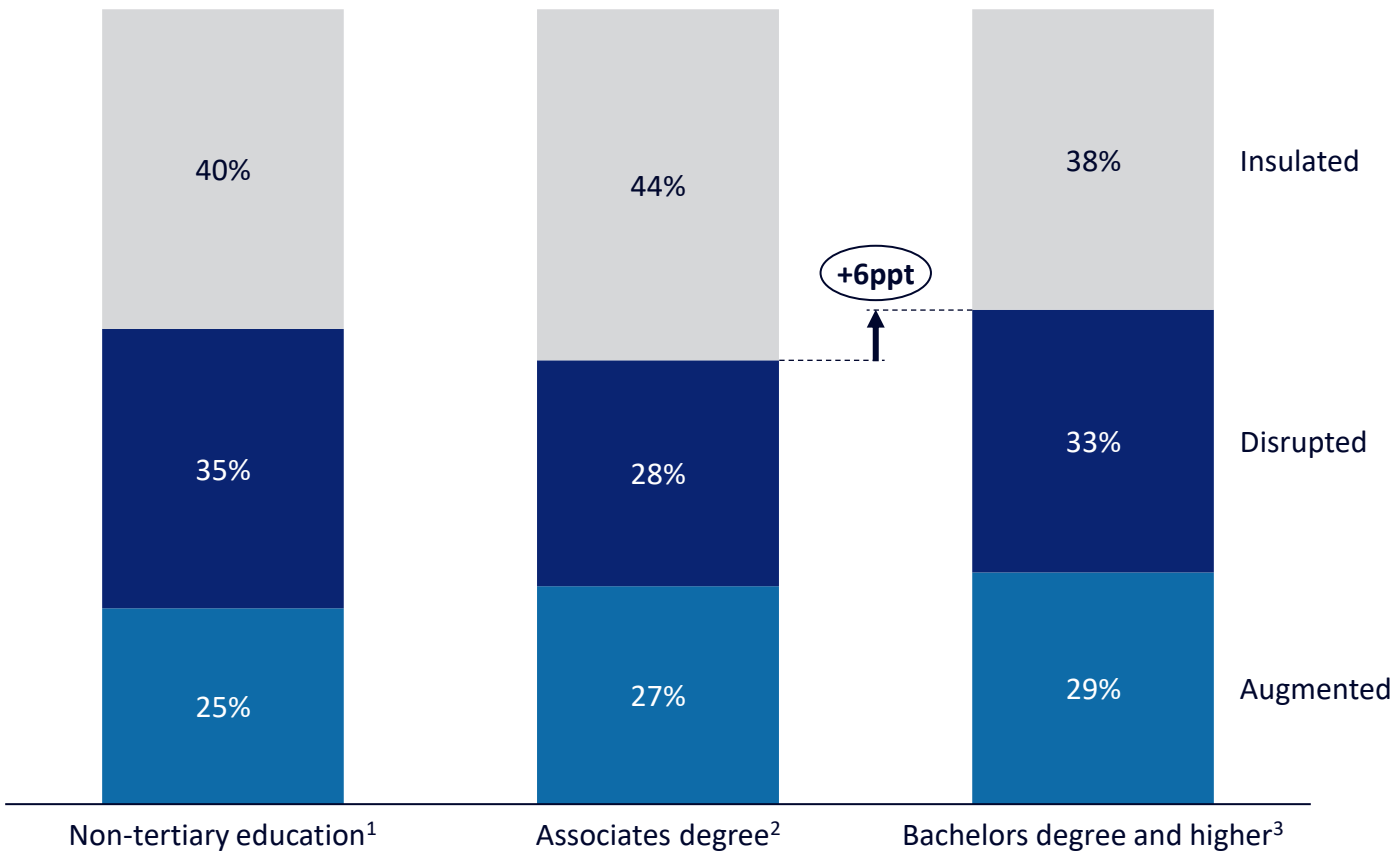
Workers with Bachelor's degrees and higher face marginally more impact by generative AI

Despite minimal variation across educational levels, Australian workers with Bachelor's degrees and higher face a 6 per cent greater likelihood of being affected by generative AI, whereas workers with Associates degrees tend to be more insulated.

In the Australian workforce, workers with Associate's degrees or their equivalents are typically overrepresented in positions that are more insulated by generative AI, such as Sales Assistant, Electrician, Carpenter, and Carer. Notably, unlike previous technological developments, which largely affected lower-paid jobs with lower education requirement, generative AI is anticipated to particularly impact some of the highest-skilled and highest-paid jobs.

For example, in the United States, LinkedIn members in occupations with the highest quartile of GAI-replicable skills were twice as likely to possess a Bachelor's degree or higher compared to those in roles with the lowest quartile of such skills. Consequently, occupations most affected by generative AI often entail a high degree of specialised skills and expertise, such as Finance Officer, Mathematician, and Web Designer.

Exhibit 9: Impact of generative AI by highest level of education attainment
% of Australian workforce in category, 2024



¹ Non-tertiary education includes education up to the secondary level, including high school diplomas.

² Associates degree includes both associate degrees and equivalent certifications.

³ Includes postgraduate degrees.

Source: ABS (2021) *Census*; ABS (2024) *Labour Force, Australia, Detailed*; ABS (2023) *Education and Work, Australia*; LinkedIn Economic Graph, Mandala analysis.

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The impact of generative AI varies by industry, largely touching service-related industries which are key sources of employment



The industries where generative AI is likely to have a greater influence typically have a higher share of women workers

Exhibit 10: Australian industries	Employment ¹ 000s of workers, 2024	Women participation ¹ % of workers, 2024	Proportion of workforce affected by GAI ¹ % of workers, 2024
Information media and telecommunications	192	39%	36% 39% 75%
Financial and insurance services	568	47%	21% 52% 73%
Professional, scientific and technical services	1,334	41%	28% 42% 70%
Accommodation and food services	893	54%	50% 17% 67%
Retail trade	1,310	54%	17% 47% 65%
Wholesale trade	387	34%	23% 40% 63%
Electricity, gas, water and waste services	160	25%	27% 34% 62%
Manufacturing	931	29%	26% 34% 60%
Administrative and support services	426	53%	26% 31% 57%
Transport, postal and warehousing	748	23%	19% 34% 53%
Education and training	1,214	73%	34% 15% 49%
Rental, hiring and real estate services	204	47%	15% 32% 48%
Other services	538	42%	20% 26% 46%
Mining	309	21%	22% 22% 44%
Arts and recreation services	282	48%	16% 27% 43%
Public administration and safety	938	51%	21% 22% 43%
Construction	1,345	14%	15% 17% 32%
Agriculture, forestry and fishing	305	32%	12% 19% 31%
Health care and social assistance	2,234	77%	13% 14% 27%

¹ ABS (2024) *Labour Force, Australia, Detailed*.

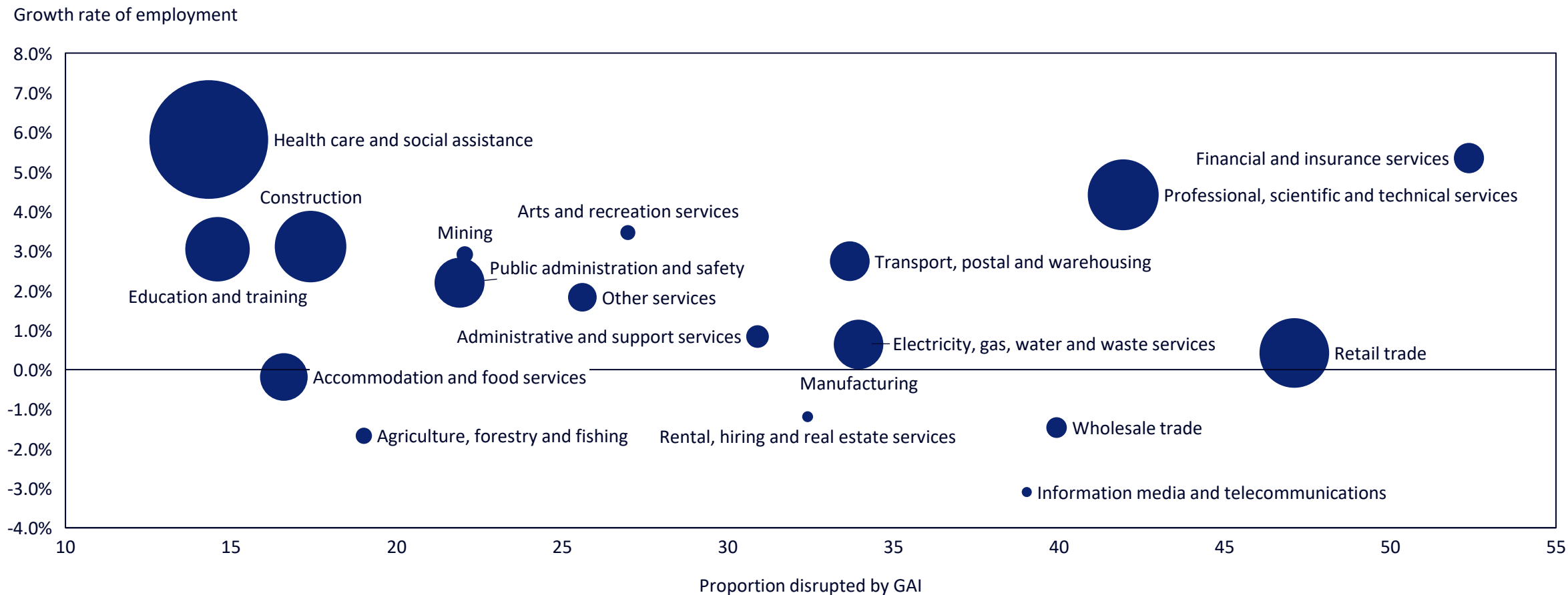
² Affected workers consist of the proportion disrupted and augmented by GAI. LinkedIn Economic Graph data.

Source: Mandala analysis.

The industries most likely to be affected by generative AI are relatively large sources of employment and have been growing faster in recent years

Exhibit 11: Share of industry relatively disrupted by generative AI versus annual employment growth

X-axis: % of workforce in industry disrupted by GAI; Y-axis: compound annual growth rate of employment (Nov 2018 – Nov 2023); Size: Number of workers, Nov 2023

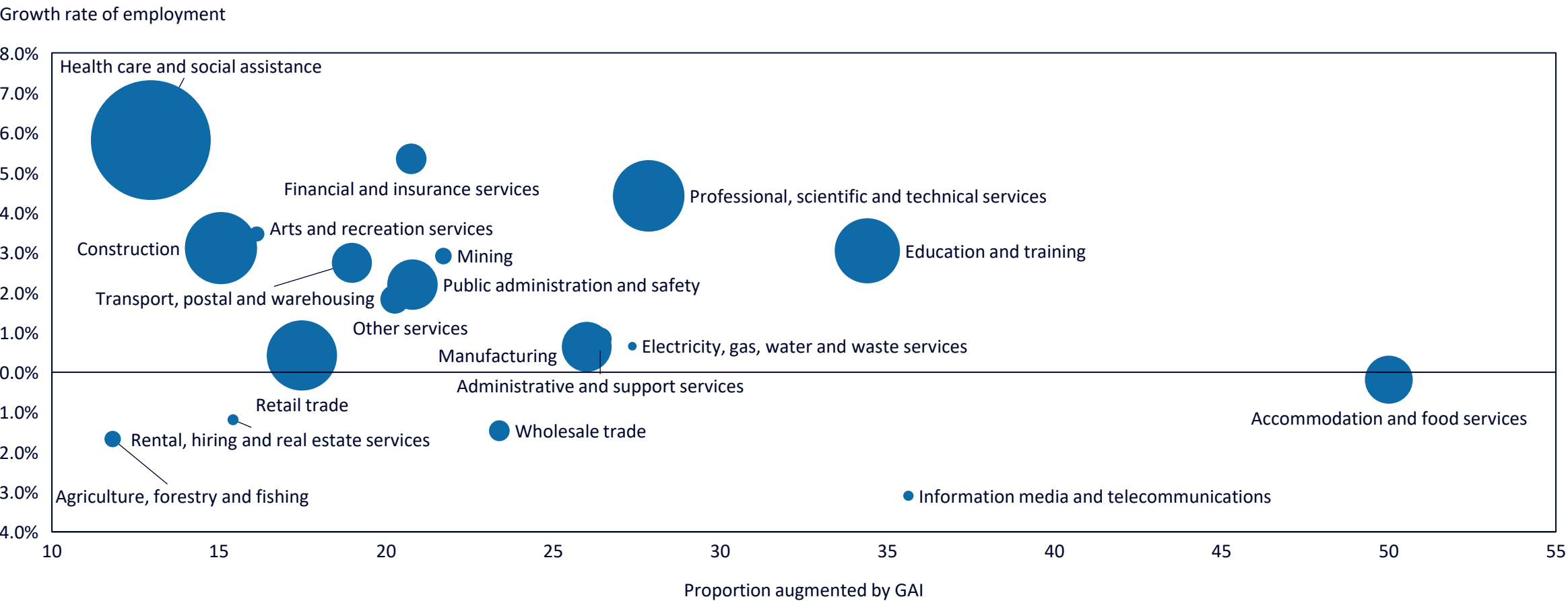


Note: This analysis only considers the proportion of skills that generative AI could affect and does not factor in the time spent on these skills by workers.
Source: ABS (2024) *Labour Force, Australia, Detailed*; LinkedIn Economic Graph data; Mandala analysis.

Meanwhile, industries most likely to be augmented by generative AI have experienced relatively slower growth in employment over the last 5 years

Exhibit 12: Share of industry relatively augmented by generative AI versus annual employment growth

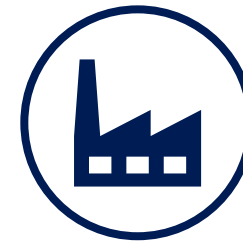
X-axis: % of workforce in industry augmented by GAI; Y-axis: compound annual growth rate of employment (Nov 2018 – Nov 2023); Size: Number of workers, Nov 2023



Note: This analysis only considers the proportion of skills that generative AI could affect and does not factor in the time spent on these skills by workers.
Source: ABS (2024) *Labour Force, Australia, Detailed*; LinkedIn Economic Graph data; Mandala analysis.

The integration of generative AI into Australia's economy will transform the workforce, but requires a nuanced approach to upskilling workers

Exhibit 13: Generative AI technologies present significant opportunities for Australia's economy



Generative AI will more strongly impact women and younger workers

- For the benefits of GAI to be equitably distributed across Australia, women and younger workers will need support in their career transitions towards a GAI economy.

GAI will especially impact occupations with higher education requirements

- Unlike most previous technological advancements that primarily affected blue collar workers or workers with lower education requirements, GAI is likely to affect professionals and white-collar workers.

Generative AI will touch industries beyond the broader tech sector

- The transformative effect of GAI on the workforce is likely to penetrate well beyond the technology industry.
- The widespread adoption of GAI products across industries may create the potential for greater job mobility for professionals across a wider array of industries.

4 Appendix



A Data sources



B References



This study uses a range of publicly available data in combination with LinkedIn's Economic Graph data to analyse the effects of GAI on the Australian workforce

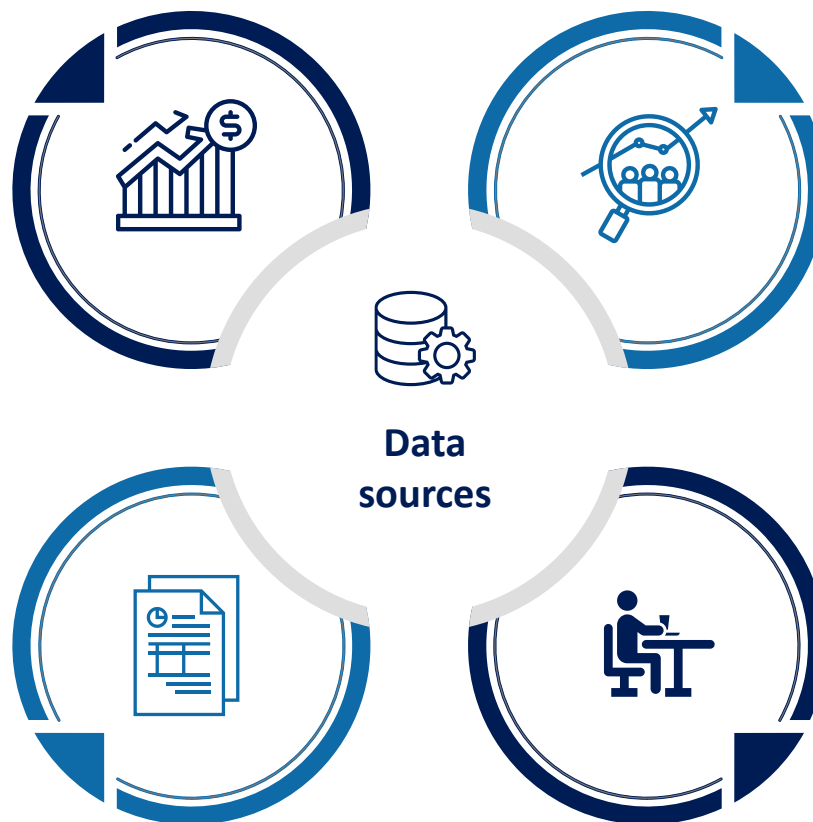
Exhibit A1: Data sources used in this study

LinkedIn Economic Graph data

Use: Data on the proportion impacted by GAI split by demographics, including skills and occupation classifications

Publicly Available data

Use: Defining generative AI and demonstrating its implications on the Australian labour force



ABS Census (2021) data

Use: Quantifying the number of workers that are impacted by GAI and their key occupations

ABS Labour Force data

Use: Macroeconomic statistics of employment by industry and labour force by highest educational attainment

To extrapolate LinkedIn's Economic Graph data into the Australian context, we concorded their industry classifications with the ABS ANZSIC classifications

Exhibit A2: Concordance of LinkedIn industry classifications and ABS ANZSIC classifications

LinkedIn industry classification	ABS ANZSIC Classifications
Accommodation and food services	Accommodation and food services
Administrative and support services	Administrative and support services
Construction	Construction
Consumer services	Other services
Education	Education and training
Entertainment providers	Arts and recreation services
Farming, ranching, forestry	Agriculture, forestry and fishing
Financial services	Financial and insurance services
Government administration	Public administration and safety
Holding companies	N/A
Hospitals and health care	Health care and social assistance
Manufacturing	Manufacturing
Oil, gas, and mining	Mining
Professional services	Professional, scientific and technical services
Real estate and equipment rental services	Rental, hiring and real estate services
Retail	Retail trade
Technology, information and media	Information media and telecommunications
Transportation, logistics, supply chain and storage	Transport, postal and warehousing
Utilities	Electricity, gas, water and waste services
Accommodation and food services	Wholesale trade

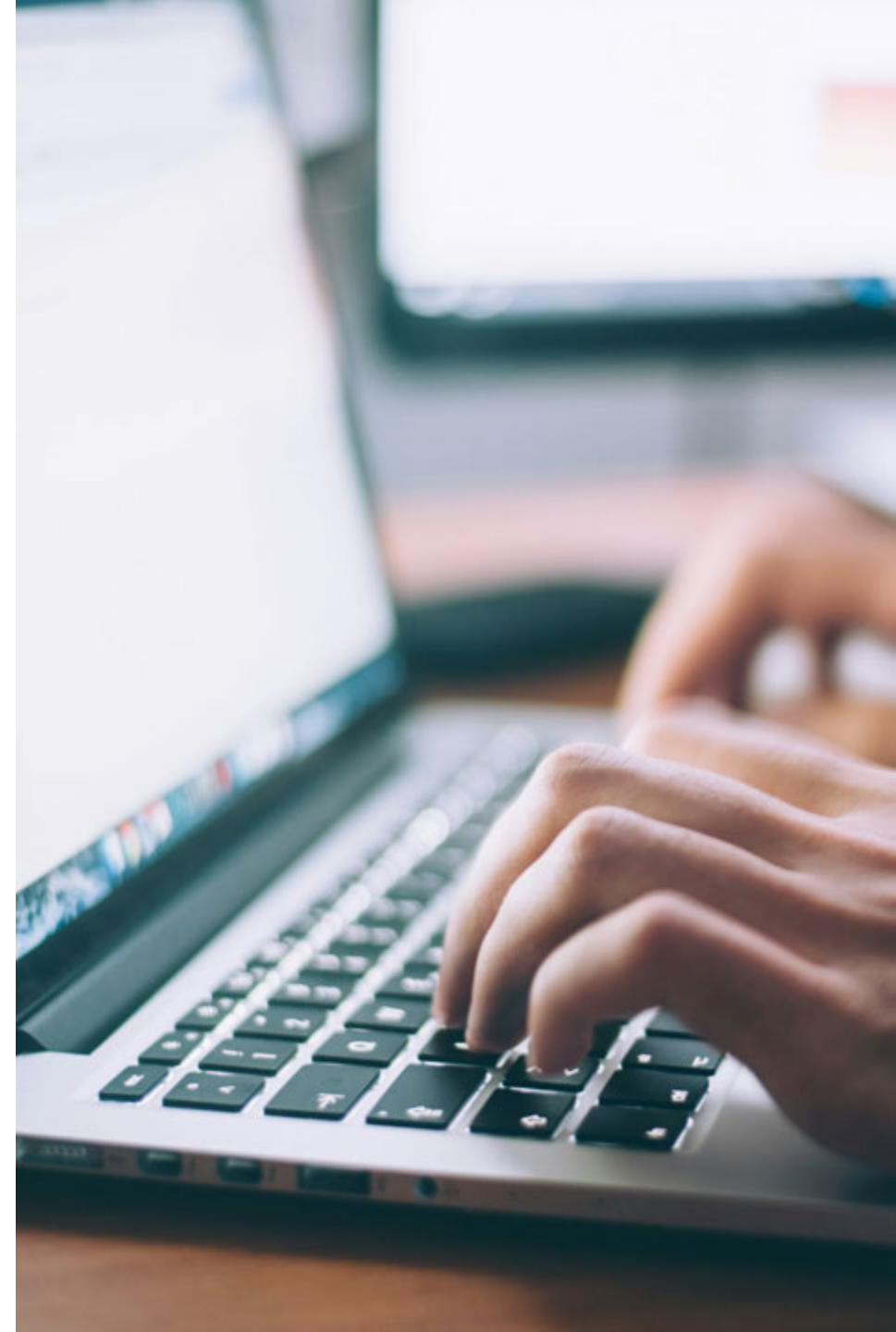
5 Appendix



A Data sources

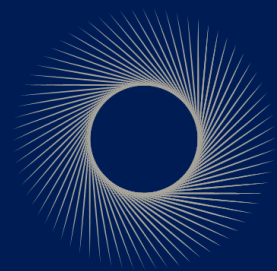


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