



Ageing Switzerland

How AI could reshape Switzerland's labour market

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About this study

This is the seventh study in our series on Switzerland's demographic challenge. All studies are available on our [website](#).

Executive Summary

As part of our [Ageing Switzerland](#) series, this report examines how artificial intelligence (AI) could affect the labour-market pressures created by demographic change. More than 900,000 workers, around one in five of today's workforce, will reach retirement age over the next decade.

AI can ease some of the resulting pressure, but it will not eliminate Switzerland's labour shortage. Its effect will depend on the tasks performed in each occupation, the scope to support or automate them, and whether productivity gains reduce labour needs or create additional demand.

The report combines Swiss demographic and occupational data with international evidence on generative AI use to assess 279 occupations. It compares demographic replacement demand, represented by the share of workers aged 55 and over, with a new AI Hotness Index that captures current AI use and the potential for large language models (LLMs) to accelerate occupational tasks.

Of the occupations analysed, 109 have replacement demand above the labour-market average. AI Hotness is concentrated in digital, information-processing and communication-intensive work: computer programmers rank first, followed by language- and content-related occupations, while administrative roles such as secretaries also rank highly.

Comparing the two indicators reveals four distinct labour-market dynamics:



High replacement demand & Low AI exposure

In care, skilled trades, transport and other physical or people-centred occupations, replacement demand is high and AI exposure is low. AI can reduce administrative burdens but cannot replace physical presence, manual skill, human judgement or direct interaction. Labour shortages will therefore persist.



Low replacement demand & Low AI exposure

Occupations with low replacement demand and low AI exposure face less immediate pressure from either demographic change or AI. This could change as AI tools evolve, so the priority is to monitor developments and invest selectively in productivity and skills.



High replacement demand & High AI exposure

Where high replacement demand coincides with high AI exposure, AI can help employees manage larger workloads and absorb part of the demographic pressure, provided organisations redesign work rather than simply add tools to existing processes.



Low replacement demand & High AI exposure

In occupations with low replacement demand but high AI exposure the principal challenge is adjustment. Tasks and skills may change rapidly, some routine work may decline, and new demand may emerge elsewhere.

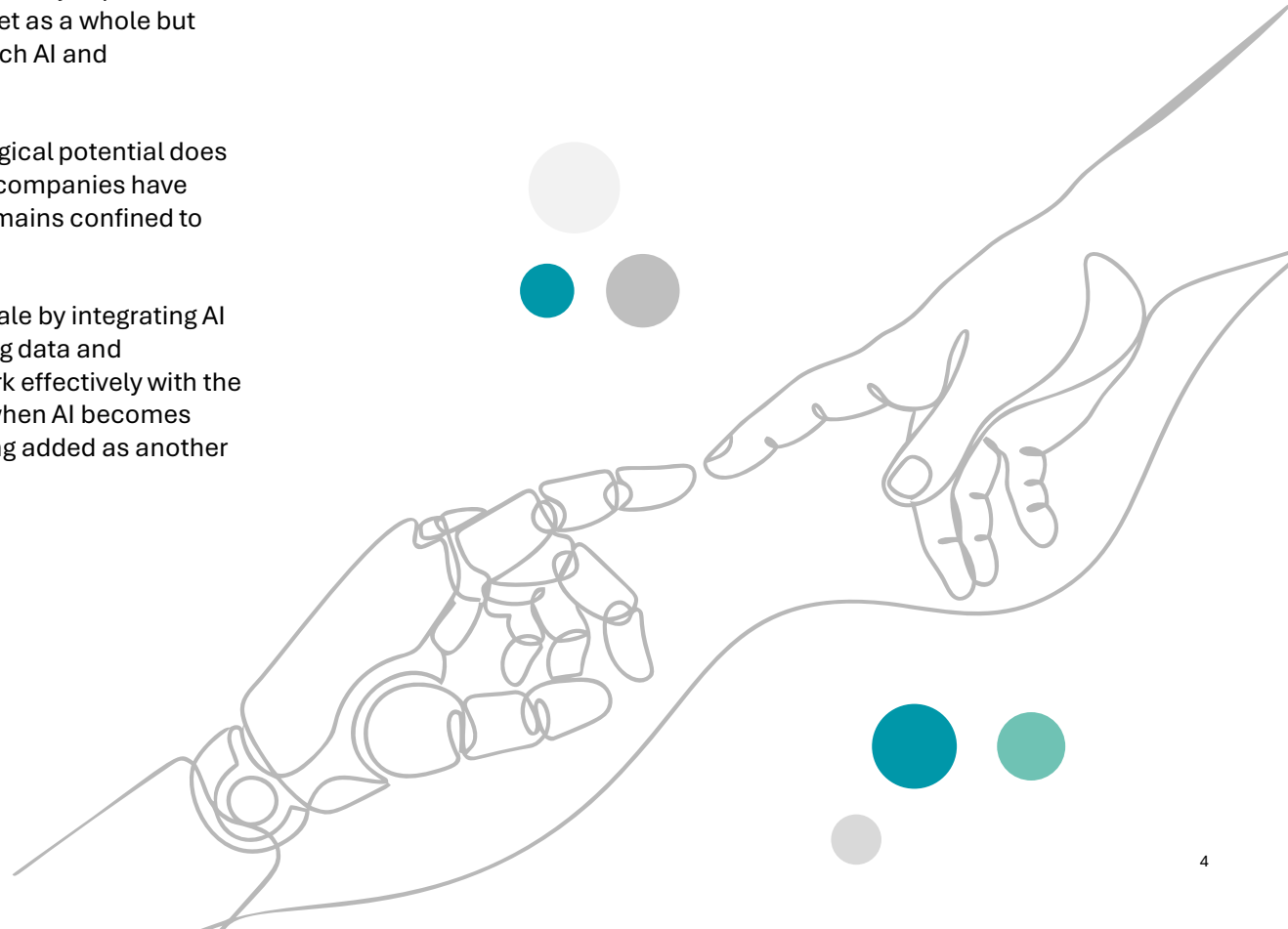
These outcomes are not predetermined. AI exposure is not a forecast of job losses, and the technology's reach, adoption and economic effects will evolve. Our analysis represents a current snapshot, focused on LLMs and related digital applications.

Broad categories can only tell part of the story. The consequences of AI will ultimately be determined at the level of individual occupations and tasks. To bring these dynamics to life, the report examines five selected job profiles. They are not intended to represent the Swiss labour market as a whole but were chosen because they illustrate different ways in which AI and demographic replacement demand can interact.

AI offers the prospect of higher productivity, but technological potential does not automatically translate into economic impact. Many companies have started experimenting with AI, yet much of this activity remains confined to pilots, isolated use cases and individual tools.

The next challenge is to move from experimentation to scale by integrating AI into core processes, redesigning workflows, strengthening data and technology foundations, and equipping employees to work effectively with the new systems. Broad productivity gains will emerge only when AI becomes embedded in how organisations operate, rather than being added as another layer of technology.

For companies, AI strategy and workforce planning must be managed as one agenda. They should assess their workforce at the occupation and task level; identify where retirements, recruitment constraints and AI potential coincide; and deploy AI where it releases genuinely scarce capacity.



AI as a productivity lever

Demographic change is placing increasing pressure on the Swiss labour market. Over the next ten years, more than 900,000 employees will reach retirement age and leave the workforce.¹ This represents around 20 per cent of today's working population. As a result, Switzerland faces substantial demographic replacement demand, which could further intensify existing labour shortages across a wide range of occupations and industries.

This replacement demand will not be distributed evenly across the labour market. Some occupational fields already have low unemployment combined with strong demand for skilled workers. If many employees in these fields retire over the coming decade, labour shortages could become particularly acute. Other occupations face higher unemployment, weaker demand for labour or comparatively moderate replacement needs. The key issue is therefore not simply how many people will leave the workforce, but also which occupations and industries will be most strongly affected.

Productivity growth through the use of technology has long been one of the most important responses to labour shortages. Computers, automation, mobile technologies and digital platforms have enabled businesses to produce more with less labour, while also creating new business models and new types of work. The question now is: could artificial intelligence become the next major productivity lever, and if so, could it help Switzerland relieve some of the demographic pressure it faces?



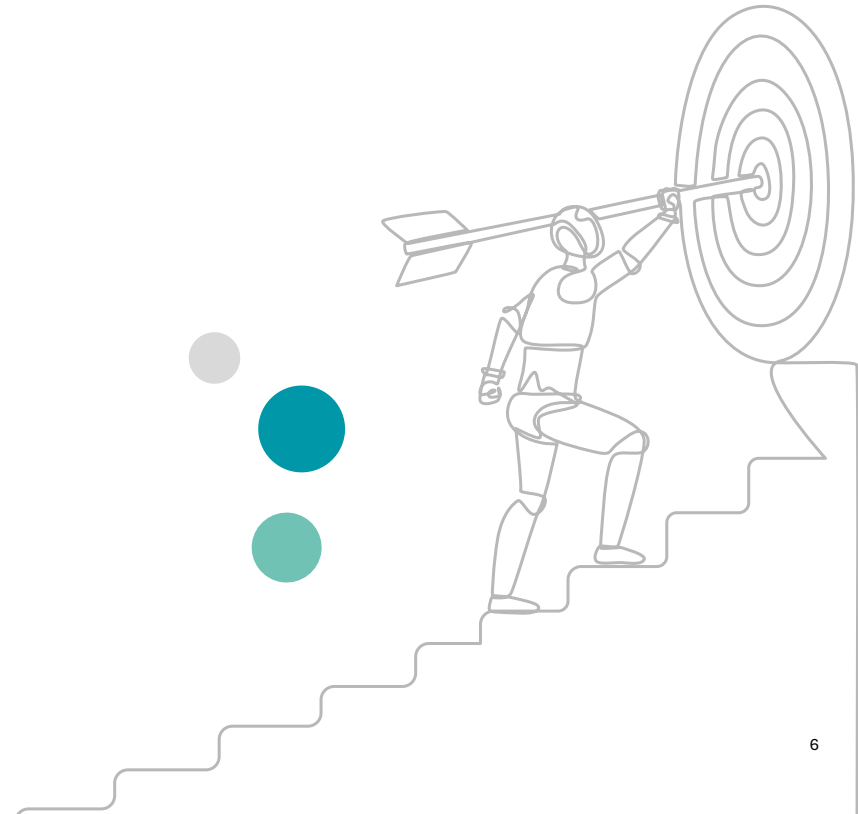
The answer to that question is that although AI cannot eliminate the problem entirely, it will certainly be able to help alleviate future labour market pressures. However, its impact will not be spread evenly across the economy.

In some occupations, AI can support or automate a significant share of tasks, helping workers to produce more in less time and limiting additional labour demand. In other areas, such as many trade professions, care work and people-focused occupations, its immediate impact on core activities is far more limited. As a result, demographic replacement demand is much more likely to translate directly into labour shortages in these fields.

At the same time, AI may increase adjustment pressure in other parts of the labour market. This is particularly relevant for occupations that already face comparatively high unemployment or weaker labour demand and involve tasks that could be substantially reshaped by AI. This report examines not only where AI can help mitigate demographic pressures, but also where labour shortages are likely to persist, and where employment risks may increase as AI adoption accelerates.

The central question is not whether AI will replace people. That framing is too simple. AI is more likely to change the relationship between humans and technology at the level of tasks. It can automate routine activities, assist employees with complex work, accelerate decision-making and improve the quality of outputs. In doing so, it has the potential to increase output per worker and absorb part of the future labour shortage without making entire occupations obsolete.

In some cases AI could even increase demand. A useful historical concept for understanding this dynamic is the Jevons paradox. In the nineteenth century, the economist William Stanley Jevons observed that improvements in the efficiency of steam engines did not reduce coal consumption. Instead, because steam power became cheaper and more productive, its use expanded, and total coal consumption increased. AI could produce a similar rebound effect. If productivity gains lower costs, improve quality or allow companies to take on work that was previously too time-consuming, demand for certain services may rise rather than fall. In that scenario, the main challenge would not be a reduced need for workers. It would be a shift in the skills, competencies and roles required in the labour market.



AI is already being used across a growing range of occupations, from software development and financial analysis to legal services and administrative work. At the same time, the technology is advancing at a pace that is both remarkable and unsettling. One of the main risks is that technological change may outpace the labour market's ability to adapt. Occupations, skill requirements and ways of working could evolve faster than the rate at which employees, businesses and education systems can adapt.

Previous technological transformations from agricultural mechanisation to industrial automation and computerisation often had their strongest effects on agricultural, manual and routine tasks, while many non-routine cognitive and knowledge-based occupations were comparatively protected or even complemented by technology. AI is blurring this distinction. Unlike earlier waves of automation, it increasingly reaches into cognitive, analytical, administrative and white-collar work.

This is precisely what gives AI its potential to become a game changer. It is not simply another digital tool. AI has the capacity to reshape which tasks people perform, which skills are required and how many workers are needed to deliver a given level of output. Whether, and more crucially, when, these productivity gains will materialise remains uncertain. So far, aggregate productivity indicators, such as labour productivity and total factor productivity (TFP), show little evidence of a broad AI-driven acceleration.² This phenomenon is often described as the Solow paradox: technological progress is widely observed, yet its impact is not immediately reflected in productivity statistics.

History suggests that it may be a matter of time before the full impact of AI is known. Similar patterns were observed during the expansion of the internet in the 1990s, when significant productivity gains only became visible after companies had made complementary investments and adapted their organisations. Whether this potential is realised, therefore, will depend on far more than the technology itself. Success will ultimately hinge on whether employees, businesses, educational institutions and governments can adapt their skills, organisational structures and policy frameworks quickly enough.



Where AI meets demographic change

To assess the potential of AI in an ageing society, we combined Swiss occupational and demographic data with international evidence on how generative AI is being used across occupational tasks. We first estimated demographic replacement demand by analysing how many people in each occupation are likely to retire within the next ten years. We then compared this with our newly developed AI Hotness Index, which captures both current AI use and the potential for AI to support or automate occupational tasks. Together, these two dimensions show where AI could help alleviate workforce pressures, where its immediate impact is likely to remain limited and where it may fundamentally reshape existing roles.

Demographic replacement demand

The replacement demand is calculated by taking the share of people aged 55 and over per occupation. It highlights where retirements are likely to create the greatest hiring needs over the coming decade. However, it reflects the economy as it exists today and is therefore a static indicator that does not account for future changes. For example, the ageing population is likely to increase demand for care workers and healthcare professionals (see our [Ageing Switzerland](#) report on the public health sector), while the continued deployment of AI and digital technologies will raise demand for software developers, ICT specialists and other tech-related professions. As a result, future labour demand may be considerably higher than the replacement demand alone suggests. Conversely, the metric does not capture the effects of technological progress, automation or changing business models, all of which could reduce labour demand through productivity improvements.

Despite these limitations, the replacement demand is a useful indicator of where labour market pressure is likely to be most pronounced. The 2024 BFS population survey provides information on over 460 occupations, however for statistical reasons we look only at occupations with a sample size of over 50 workers. This leaves us with 310 occupations that can be grouped into 42 occupational groups.



AI Hotness Index

Analysing current patterns of AI usage provides valuable insight into where AI is already influencing work today. To do so, we created an AI Hotness Index that combines two dimensions:

01 Actual AI usage data based on Claude and Copilot conversations from Anthropic and Microsoft, respectively, mapped to occupational tasks.

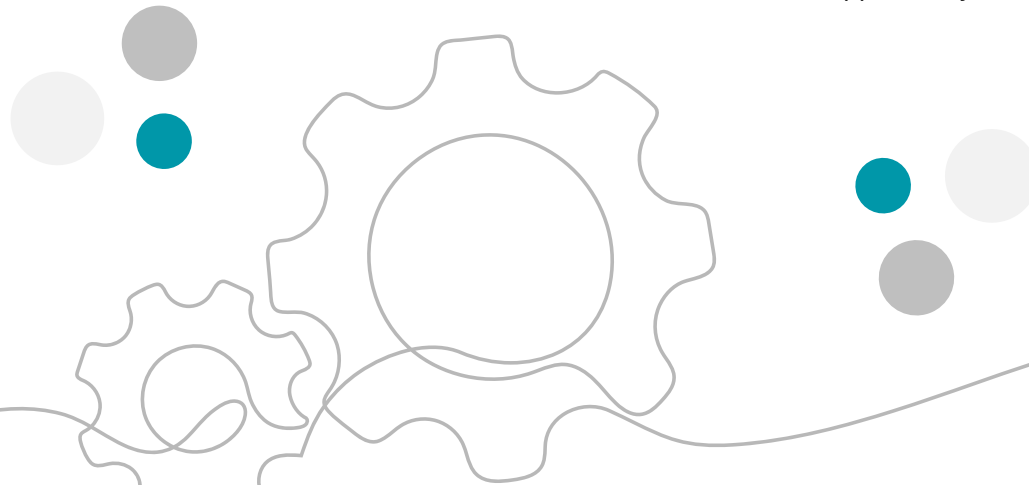
02 Exposure estimates developed by OpenAI researchers and collaborators that assess the potential for LLMs to reduce the time required to perform

In both cases, the underlying AI usage data comes from US occupational research. To make it comparable with Swiss labour market data, we mapped US occupational classifications to their Swiss equivalents, resulting in a dataset covering 279 occupations.

Findings

Our analysis reveals that demographic replacement demand cuts across occupations with very different skill profiles and areas of work. The highest replacement rates are found across professional and public-sector occupations, transport and skilled trades, as well as care and service roles. Judges, for example, face the greatest replacement need, while bus and tram drivers, toolmakers and domestic cleaners also rank highly. Significant replacement demand is also evident in education, health care, management and administrative occupations. In total, over 900,000 workers are set to retire within the next ten years, which represents around 20% of today's workforce. Among the 279 occupations analysed, 109 have replacement demand exceeding this average over the coming decade.

AI usage, by contrast, is much more concentrated in occupations involving digital, information processing and communication-intensive tasks. As a result, ICT and software-related occupations dominate the top of the AI Hotness ranking followed by a range of language and content-related occupations, such as translators, authors and journalists. Administrative and communication roles including secretaries, office clerks and public relations professionals are also seeing high levels of AI exposure. These occupations share a high proportion of cognitive and digital tasks that can already be supported by today's AI systems.



Top 20 occupations by AI Hotness and replacement demand

Replacement demand is ranked by the share of total employment per occupation

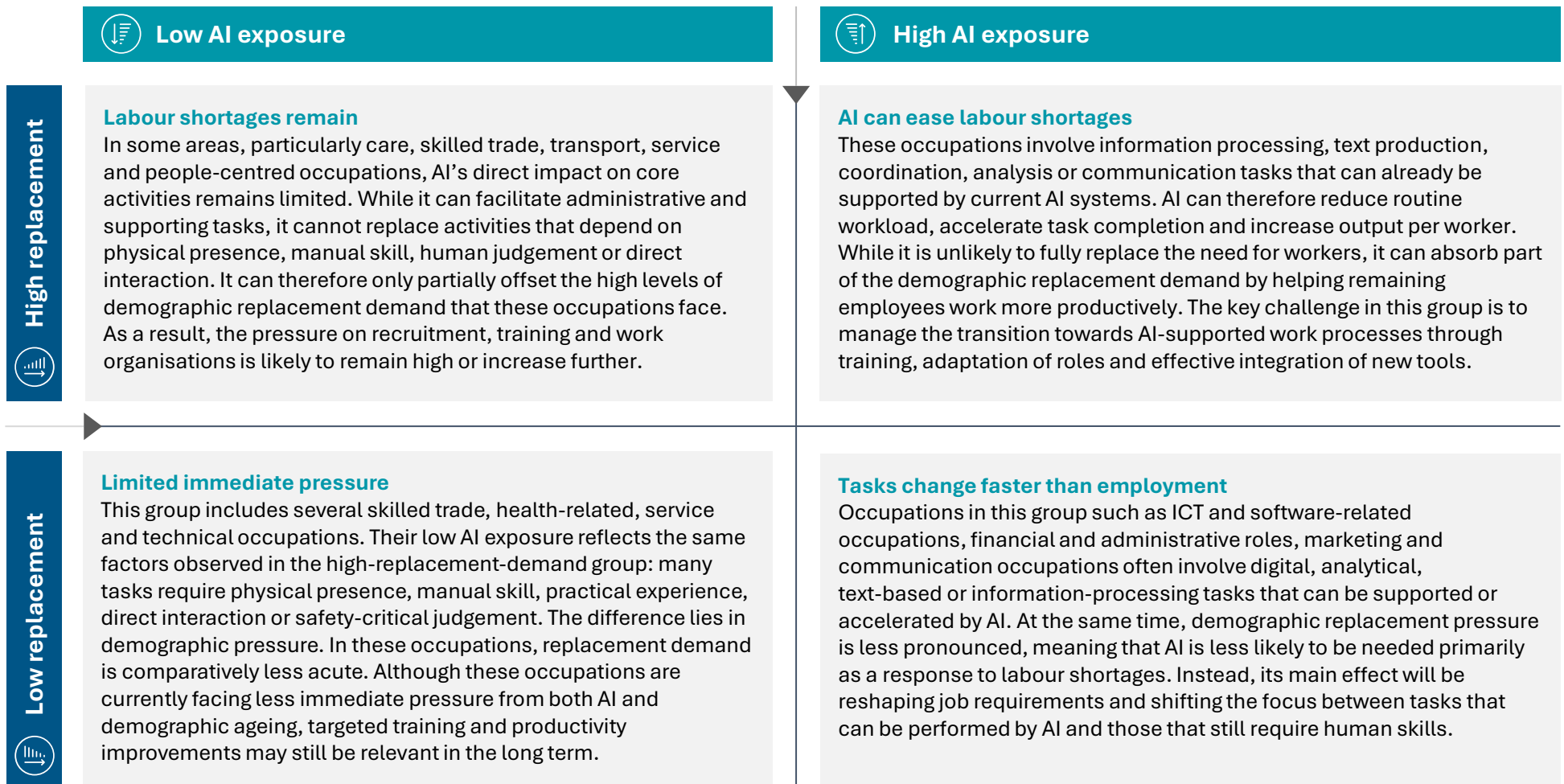
AI Hotness		Replacement demand			
Rank		Rank		Absolute number	Share in %
1	Computer programmers	1	Judges	824	41%
2	Software developers	2	Religious professionals	2,373	40%
3	Web and multimedia developers	3	Senior officials of special-interest organisations	1,599	38%
4	Translators, interpreters and other linguists	4	Bus and tram drivers	6,803	35%
5	Authors and related writers	5	Traditional and complementary medicine professionals	2,677	34%
6	Database designers and administrators	6	Toolmakers and related workers	1,666	33%
7	Journalists	7	Domestic cleaners and helpers	8,720	33%
8	Systems administrators	8	Construction managers	2,336	31%
9	Systems analysts	9	Services managers	583	31%
10	Other software and applications developers and analysts	10	Librarians and related information professionals	1,239	31%
11	Secretaries	11	Legislators	606	31%
12	Public relations professionals	12	Healthcare assistants	13,000	30%
13	Commercial sales representatives	13	Mixed crop and animal producers	14,037	30%
14	ICT operations technicians	14	Secretaries	5,549	30%
15	General office clerks	15	University and higher education teachers	5,121	30%
16	Contact centre information clerks	16	Other language teachers	2,613	30%
17	Clerical support workers	17	Senior government officials	4,201	30%
18	ICT user support technicians	18	Education managers	3,005	29%
19	Electronics engineers	19	Other music teachers	2,644	29%
20	Education methods specialists	20	Laundry machine operators	1,257	29%

Bottom 20 occupations by AI hotness and replacement demand

Replacement demand is ranked by the share of total employment per occupation

AI Hotness		Replacement demand		
Rank		Rank	Absolute number	Share in %
260	Building frame and related trades workers	260	1,073	11%
261	Physiotherapy technicians and assistants	261	313	11%
262	Manufacturing labourers	262	821	10%
263	Sheet-metal workers	263	419	10%
264	Metal finishing, plating and coating machine operators	264	542	10%
265	Floor layers and tile setters	265	306	10%
266	Health care assistants	266	3,878	10%
267	Freight handlers	267	366	10%
268	Plasterers	268	155	9%
269	Cleaners and helpers in offices, hotels and other establishments	269	475	9%
270	Spray painters and varnishers	270	336	9%
271	Laundry machine operators	271	2,370	8%
272	Garden and horticultural labourers	272	501	8%
273	Building construction labourers	273	918	8%
274	Structural-metal preparers and erectors	274	321	8%
275	Roofers	275	447	8%
276	Civil engineering labourers	276	527	6%
277	Concrete placers, concrete finishers and related workers	277	195	5%
278	Packing, bottling and labelling machine operators	278	58	3%
279	Domestic cleaners and helpers	279	118	2%

Comparing the demographic replacement demand indicator with the AI Hotness Index shows that AI will not fundamentally solve the challenges posed by demographic change. However, it will still have an impact which will vary considerably across tasks and occupations.

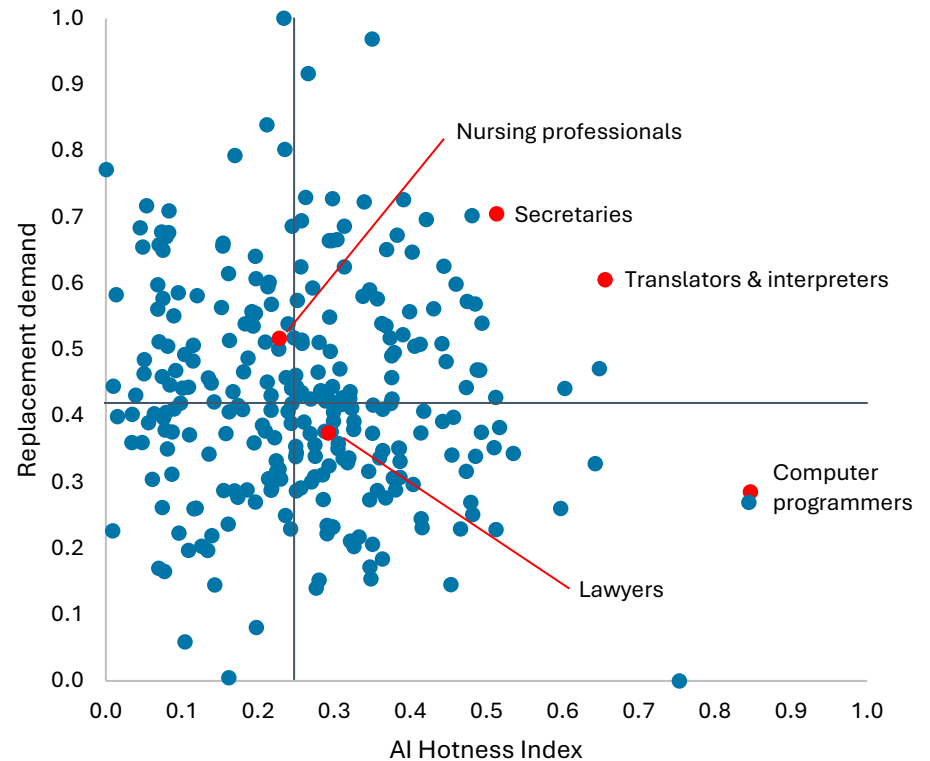


Our analysis reveals that AI will not uniformly solve Switzerland's demographic labour challenge. In knowledge-intensive occupations, AI can meaningfully offset replacement demand. In care, trade and people-centred occupations, labour shortages will persist. And in occupations already facing weaker demand, AI may accelerate the need for workforce transitions.

This differentiated picture is essential, not only for policymakers and business leaders, but equally for individuals. A one-size-fits-all approach will not work. Instead, companies and government must pursue targeted strategies: immigration for some sectors, training and upskilling for others, productivity investment for still others. But success ultimately depends on individuals taking responsibility for their own careers.

Workers must embrace lifelong learning, remain open to technological change and be willing to adapt their skills as occupations evolve. The responsibility for managing these transitions is shared across three levels: policymakers must create the framework and invest in education; companies must invest in their workforce and adapt their business models; and individuals must take ownership of their own development and remain agile in the face of change.

Replacement demand and AI Hotness on a scale from 0-1



Note: The AI Hotness score and replacement demand have been normalised on a scale from 0 to 1, where higher values indicate greater AI Hotness or demographic replacement demand, respectively. The four quadrants are divided according to the median values of each indicator. Top left shows high replacement demand and low AI exposure, while the top right shows high replacement demand and high AI exposure. The bottom left shows low replacement demand and low AI exposure, while the bottom right shows low replacement demand and high AI exposure. Marked in red are occupations discussed in "Selected job profiles".

Selected job profiles



Computer programmers

AI Hotness Index: **Rank #1** | Replacement demand: **Rank #223**

Computer programmers rank first in the AI Hotness index, making programming one of the occupations currently most affected by advances in artificial intelligence. At the same time, demographic replacement demand is comparatively low. 1,870 computer programmers are currently aged 55 or older and therefore set to retire within the next ten years. This represents a share of 14 per cent, thereby placing the occupation well below the labour market average of 19 per cent. Rather than alleviating workforce shortages, AI is more likely to fundamentally change how programming tasks are carried out.

The impact of AI

Advances in AI are already reshaping many of the core tasks performed by computer programmers. Modern AI coding assistants can generate code, explain existing implementations, identify errors, write documentation and suggest improvements to existing software. This reduces time spent on routine tasks and allows programmers to contribute more quickly. Large technology companies have already embedded these capabilities into everyday development workflows. At Google, for example, around three-quarters of newly written code is now generated by AI before being reviewed by human programmers, while Microsoft and Meta have reported similarly ambitious adoption of AI-assisted programming.³

Research also points to substantial productivity gains. Experimental evidence from GitHub Copilot found that programmers completed coding tasks more than 50 per cent faster when supported by AI, with the greatest benefits observed among less experienced programmers.⁴ However, junior programmers are also more at risk as the focus shifts from writing and debugging simple code towards tasks such as code review, quality assurance and risk assessment, which require broader professional judgement.⁵ Although AI can increasingly support code review and testing, human oversight remains essential, not only to identify logical errors, security vulnerabilities and performance issues, but also to ensure compliance with regulatory requirements.

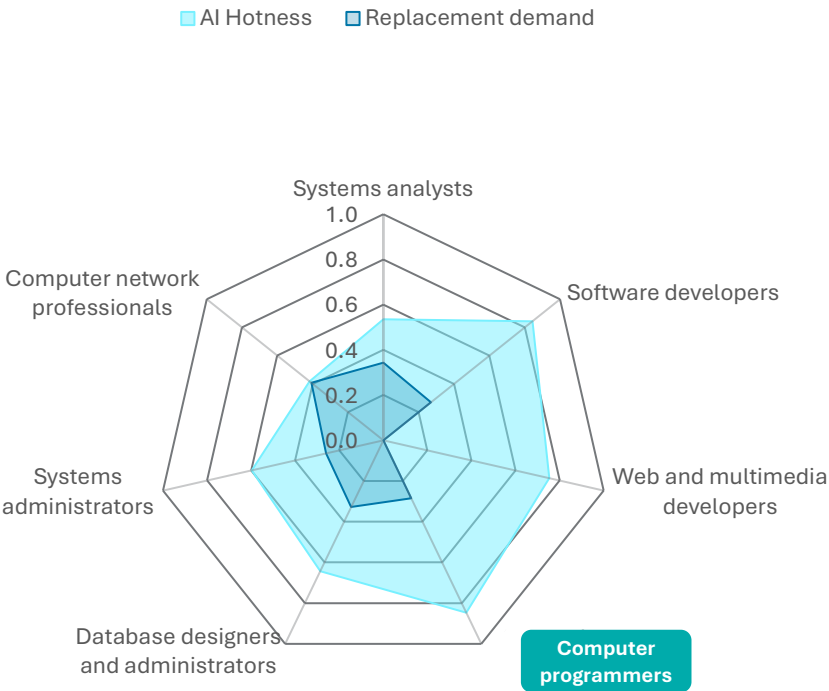
The impact on demographic replacement demand

The productivity gains enabled by AI could help offset some of the effects of demographic ageing by allowing fewer programmers to deliver more output.

However, there is an opposite effect: as organisations across industries integrate AI into products, services and internal processes, the demand for software development is expanding.⁶ AI is creating demand for new types of applications from AI-powered legal tools and healthcare solutions to industry-specific automation systems. This requires computer programmers with new skills to integrate AI models into existing software, adapt solutions to specialised requirements and address challenges related to data, security and regulation.

This creates a paradox. While routine coding tasks will decline, demand is emerging for expertise in areas such as AI infrastructure, model optimisation and testing frameworks for AI-assisted software development. The net effect on programmer employment will depend on how quickly organisations adopt AI and how much new demand emerges for AI-powered applications. What is certain is that programming as a profession will evolve: routine coding will become less central, while AI integration and specialisation will become more critical.

AI Hotness versus replacement demand for ICT professionals



Note: In order to compare the two indicators, AI exposure and replacement demand are shown on a scale from 0 to 1 with 1 representing the highest possible AI exposure or replacement demand, respectively.

Selected job profiles



Translators, interpreters and other linguists

AI Hotness Index: **Rank #4** | Replacement demand: **Rank #41**

Translators and interpreters face a unique challenge. They rank fourth on the AI Hotness Index while also facing high demographic replacement demand with 26 per cent (1,494 workers) set to reach retirement age within the next ten years. However, AI's impact will likely exceed the replacement demand. Rather than simply offsetting retirements, AI threatens to fundamentally reduce the volume of translation work available, making this one of the professions most disrupted by artificial intelligence.

The impact of AI

Machine translation has been reshaping the profession of translators and interpreters for many years. The widespread adoption of services such as Google Translate or DeepL made instant translation freely accessible and reduced the need for human translators for many routine tasks.⁷ Large language models represent the next stage of this development. Compared with earlier machine translation systems, they produce more natural-sounding translations and increasingly provide simultaneous speech translation in real time. Large language models have further improved translation quality by producing more fluent and idiomatic output, while allowing users to tailor translations to different styles and contexts.

As a result, AI is increasingly capable of performing many routine translation tasks that previously required human translators. Therefore, the role of professional translators is shifting and shrinking. Rather than translating every text from scratch, translators are increasingly relegated to reviewing, editing and refining AI-generated translations. While this work will continue to require human expertise, it represents a fundamental shift in the market. The volume of high-value translation work is declining, and the commodification of review-and-edit tasks is exerting downward pressure on professional fees.

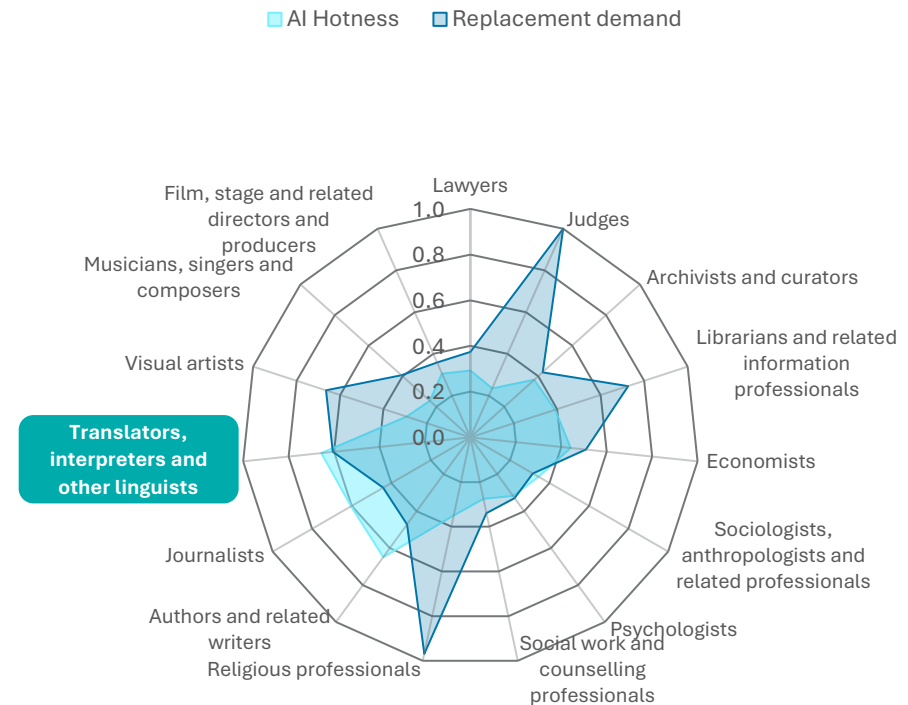
There are important exceptions. Legal, literary and culturally sensitive translations will continue to require human expertise and judgement as they often require an understanding of context, tone, ambiguity and linguistic nuance that extends beyond the literal meaning of words. In addition, while AI achieves very high translation quality for widely spoken languages, performance remains more limited for underrepresented languages with less training data.⁸ However, these specialised areas represent only a part of the translation market. The majority of routine commercial, technical and administrative translation which currently employs most translators is increasingly vulnerable to automation.

The impact on demographic replacement demand

The rapid progress of AI in translation will not simply alleviate workforce pressures associated with demographic ageing. Instead, it will reduce the total volume of translation work available. The profession will shrink, not grow, particularly as the increased use of AI systems will also negatively impact the attractiveness of entering the profession. Fewer translators will be needed, while those who remain are more likely to specialise in high-value or technically complex work.

For the broader translator workforce, particularly those focused on routine commercial translation, the outlook is challenging. Adaptation and upskilling towards editing, quality assurance and specialised domains will be essential for career sustainability. Unlike programmers, where new AI-related demand is emerging, translators face a contracting market where the primary opportunity lies in serving the remaining high-value segments.

AI Hotness versus replacement demand for legal, social and cultural professionals



Note: In order to compare the two indicators, AI exposure and replacement demand are shown on a scale from 0 to 1 with 1 representing the highest possible AI exposure or replacement demand, respectively.

Selected job profiles



Secretaries

AI Hotness Index: **Rank #11** | Replacement demand: **Rank #14**

Secretaries rank highly on both the AI Hotness Index and the demographic replacement demand ranking, with roughly 30 per cent (5,549 workers) aged 55 and over. However, unlike occupations where AI simply reduces demand, secretaries are likely to be positioned for a different outcome. While AI will automate routine administrative tasks, it could also create new opportunities for secretaries who evolve into organisational all-rounders, facilitating AI adoption, supporting colleagues through technological change and providing the interpersonal and coordination skills that become more valuable in an increasingly automated workplace.

The impact of AI

Many of the traditional responsibilities of secretaries can now be supported by AI. Modern AI tools can draft emails and reports, summarise documents, generate meeting minutes, manage calendars, organise documents, prioritise emails and retrieve information from large volumes of data. AI-powered assistants can also schedule appointments, coordinate travel arrangements and handle routine customer enquiries.

By automating these repetitive and time-consuming administrative tasks, AI frees secretaries up to focus on what machines cannot do: for example, performing activities that require understanding organisational dynamics, managing complex workflows and providing the human judgement and personal touch that keeps organisations functioning smoothly. In a world of increasing automation, these interpersonal and coordination skills become more valuable, not less.

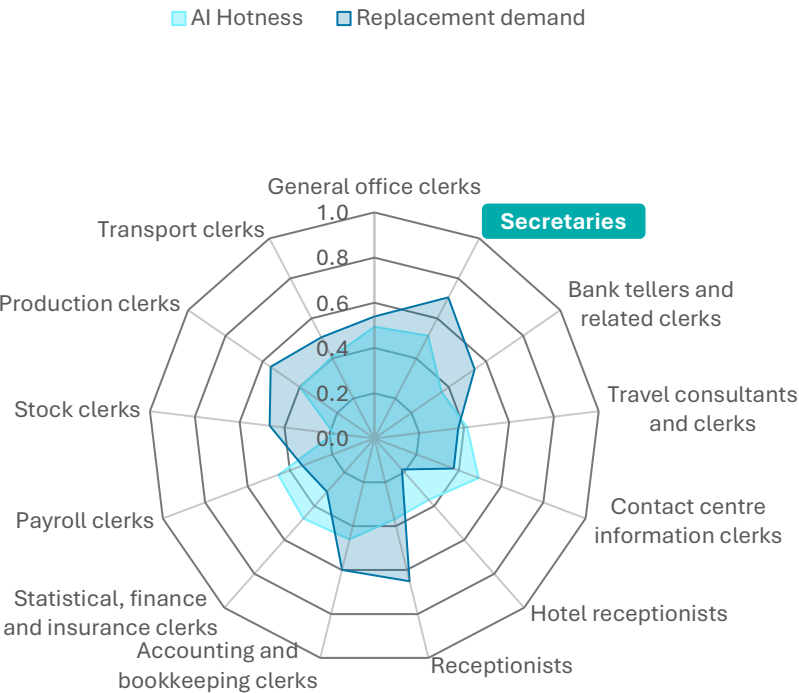
As organisations adopt AI across their operations, the secretarial role has an opportunity to evolve. This is particularly relevant in smaller organisations where dedicated transformation teams are often absent. Secretaries understand how the organisation works in practice, its informal networks, everyday workflows and operational pain points. As AI tools are introduced, secretaries can help colleagues adopt new ways of working, organising information and coordinating processes.⁹ This creates a pathway from primarily administrative work towards a broader role as a facilitator of organisational change.

The impact on demographic replacement demand

The high degree of task automation suggests that AI has considerable potential to alleviate workforce pressures associated with demographic ageing within the secretarial profession. By reducing the time required for routine administrative work, AI enables individual secretaries to support more employees and manage larger workloads, helping organisations maintain administrative capacity despite a shrinking labour force.

Nonetheless, AI is unlikely to eliminate the need for secretaries altogether. As organisations become more automated and technology-driven, the human element becomes more important, not less. In many organisations, particularly small and medium-sized enterprises, this creates an opportunity for secretaries to develop into organisational all-rounders who combine technical competence with interpersonal skills and act as a bridge between technology and people. However, this transition will not happen automatically. It will require companies to redesign the role, provide relevant training and give secretaries an active role in the adoption of AI-supported working practices.

AI Hotness versus replacement demand for office, secretarial and accounting personnel



Note: In order to compare the two indicators, AI exposure and replacement demand are shown on a scale from 0 to 1 with 1 representing the highest possible AI exposure or replacement demand, respectively.

Selected job profiles



Lawyers

AI Hotness Index: **Rank #115** | Replacement demand: **Rank #176**

Lawyers occupy a middle position. Demographic replacement demand at 17 per cent (2,816 workers) is moderate, and AI exposure is above average but not extreme. However, the impact of AI on the legal profession is more complex than simple productivity gains. While AI can automate routine analytical and administrative work, it simultaneously creates new responsibilities for legal professionals, particularly around accountability, risk management and the governance of AI systems themselves.

The impact of AI

The legal profession is mixed in its exposure to AI. Routine analytical and administrative work such as contract review, document analysis, regulatory research or due diligence can increasingly be automated. This not only reduces the time required to complete these tasks, it may also reduce demand for routine legal work altogether as clients handle more activities themselves. At the same time, a large part of the core of legal practice like negotiation, strategic judgement, client counselling, advocacy and courtroom representation still require the human touch, even as AI tools become more efficient in the preparation of these tasks. This creates the paradox that junior lawyers, who traditionally build expertise through routine work, may find fewer opportunities to learn these foundational skills, while senior lawyers may see their time freed up for higher-value work.

Deloitte's [Future of Legal Work](#) report shows that the impact of AI is especially visible in contract management, M&A due diligence and regulatory compliance. Contract teams can use AI to review agreements against standard playbooks and identify clauses that require amendment. Transaction teams can search large multilingual document collections to detect potential risks or opportunities more efficiently. Compliance functions can compare internal policies and communications against evolving regulatory requirements and flag areas of possible non-compliance.

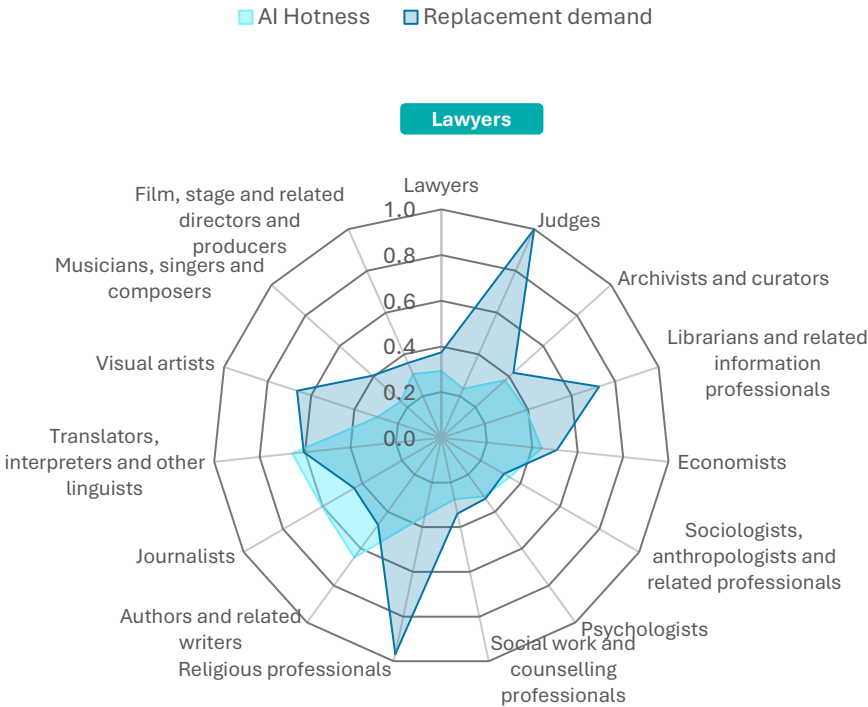
Many legal professionals and organisations have taken their first steps through platforms such as Microsoft Copilot, Google Gemini or internally developed AI assistants.¹⁰ However, there is also a growing ecosystem of specialised legal AI providers that offer solutions trained on legal datasets and workflows. Legal AI requires domain-specific training to understand legal language, precedent and regulatory context. As these tools mature and adoption accelerates, the legal profession will need to develop new competencies around AI governance and risk management.

The impact on demographic replacement demand

The time saved on administrative and routine analytical tasks could help lawyers focus on higher-value activities such as strategic advice, complex negotiations and client relationships. However, AI is also creating new responsibilities for legal professionals. As organisations deploy AI systems in legal work, lawyers must define how these systems will be used, who approves their outputs, and what happens when they fail. In regulated sectors and customer-facing processes, these questions become especially critical.¹¹ If an AI system produces an incorrect legal opinion or misses a compliance risk, who is liable?

These governance and risk-management questions cannot be outsourced to technologists; they require legal expertise and professional judgement. Our view is therefore that AI will reshape rather than remove demand for legal expertise. Routine analytical and administrative work will become less central, while strategic advice, complex judgement, accountability and AI oversight will gain importance. This shift will also change the structure of legal careers. Junior lawyers may have fewer opportunities to develop through routine work, while senior lawyers will be able to focus more of their time on higher-value activities. The net effect on employment remains uncertain, but the direction of change is clear. The profession's centre of gravity will shift from producing legal analysis towards reviewing, applying and taking responsibility for it.

AI Hotness versus replacement demand for legal, social and cultural professionals



Note: In order to compare the two indicators, AI exposure and replacement demand are shown on a scale from 0 to 1 with 1 representing the highest possible AI exposure or replacement demand, respectively.

Selected job profiles



Nursing professionals

AI Hotness Index: **Rank #167** | Replacement demand: **Rank #76**

Nursing professionals face high demographic replacement demand of 23 per cent (21,798 workers) as the healthcare workforce ages. At the same time, they rank below the median on the AI Hotness Index because many of their core activities cannot be performed by generative or agentic AI. This creates a very different dynamic from that observed in other professions. AI will not eliminate the need for nurses, although its impact will vary depending on the type of nursing work. While AI can help manage growing workloads, it will not fully offset the pressures created by demographic ageing.

The impact of AI

AI is increasingly being adopted in healthcare to support nursing professionals in both administrative and clinical tasks. One of the most immediate applications is reducing the burden of documentation.¹² Nurses spend a significant share of their working time recording patient information, updating electronic medical records and completing administrative processes. While these tasks are essential for ensuring continuity and quality of care, they frequently reduce the time available for direct patient interaction and contribute to burnout. Modern AI tools can automatically capture and summarise patient encounters freeing nurses to focus on direct patient care, making this one of the most impactful applications of AI in healthcare.¹³

Beyond documentation, AI can support nursing practice by improving access to information and assisting with clinical workflows. AI systems can analyse patient data to identify risks, support triage and provide decision support, while digital tools can facilitate remote patient monitoring and virtual care models. These applications can help nurses manage patients more efficiently, particularly as healthcare systems seek to provide care across hospital, residential and home-based settings. However, these tools can only act as a support. Nurses must still interpret results, consider patient context and make final clinical decisions themselves.

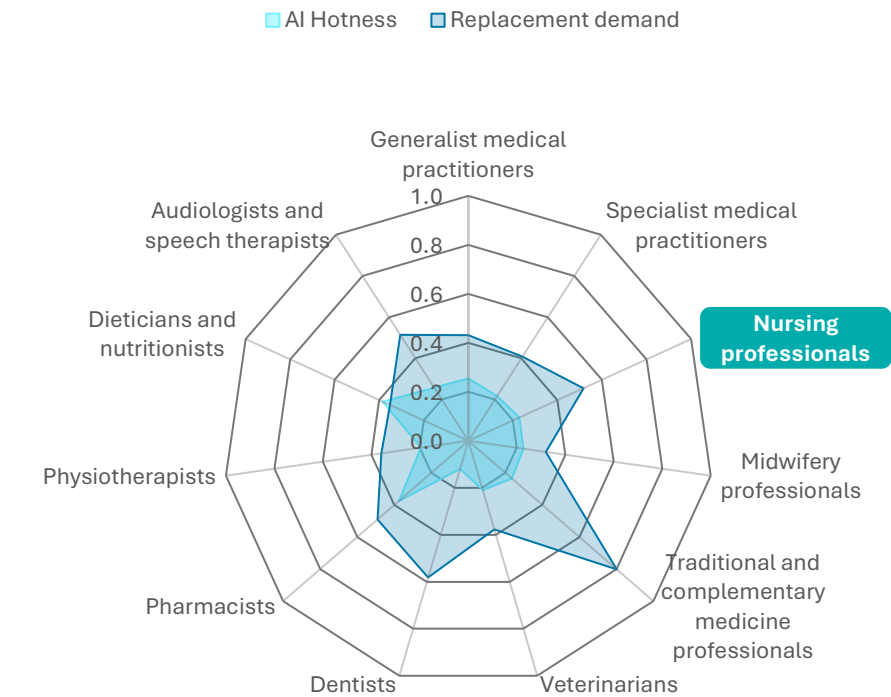
The impact on demographic replacement demand

The productivity gains enabled by AI could help offset some of the effects of demographic ageing by reducing administrative burdens and allowing nursing professionals to spend more time providing direct patient care. However, the impact on overall labour demand will be uneven. Many core nursing activities include providing physical care, communicating with patients and their families and responding to complex or unpredictable situations. These tasks remain difficult to automate.

At the same time, demographic ageing is driving sustained growth in demand for nursing services. As highlighted in Deloitte's Ageing Switzerland report on the healthcare system, rising life expectancy and the increasing prevalence of chronic diseases are expected to increase demand across hospitals, rehabilitation facilities, residential care and home care. AI is therefore likely to act primarily as a complement to the nursing workforce, helping nursing professionals manage growing workloads and improve the efficiency and quality of care rather than reducing the need for a large nursing workforce. It will not eliminate the fundamental challenge that Switzerland will need more nurses, not fewer, in the coming decades.

While advances in robotics may eventually automate some physical aspects of nursing and care like patient lifting, bathing and mobility, these technologies remain outside the scope of the AI Hotness Index in this report. The analysis presented here therefore focuses on the impact of LLMs and related digital applications.

AI Hotness versus replacement demand for health professionals



Note: In order to compare the two indicators, AI exposure and replacement demand are shown on a scale from 0 to 1 with 1 representing the highest possible AI exposure or replacement demand, respectively.

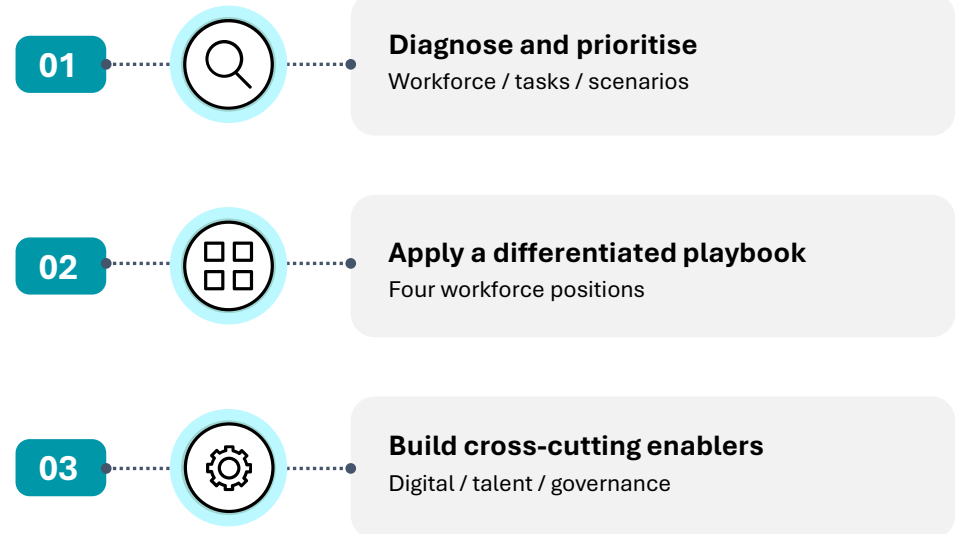
What corporates need to do

AI and demographic change must be managed together. Although AI will not remove the labour market pressure created by an ageing workforce, it has the potential to mitigate its impact. In some occupations, AI can help scarce workers manage larger workloads. In others, its effect on core activities will remain limited. Elsewhere, it may reduce demand for particular tasks, reshape roles or create new sources of demand.

For companies, the key question is no longer how many employees they will need in the future. Instead, they will have to ask themselves which tasks will remain human, which can be supported or automated by AI, and where demographic replacement demand will persist despite technological progress.

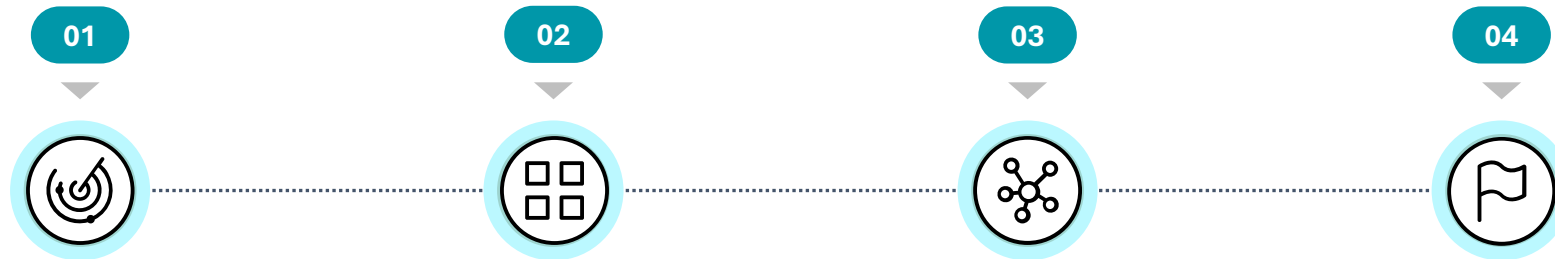
The four scenarios of demographic replacement demand and AI exposure identified in this report provide a useful starting point for companies looking to formulate a long-term strategy. But they are not a prediction of what will happen to every occupation in a quadrant as progress regarding AI exposure remains hard to predict. Companies therefore need to combine the quadrant logic with their own evidence on recruitment conditions, expected demand, workforce structure and processes.

We propose a response in three layers: a foundation based on **diagnosis and prioritisation**, a **differentiated playbook** organised around the four labour-market dynamics, and a set of **cross-cutting enablers** that determine whether any of it works in practice



Layer 1: Diagnose and prioritise

Before deploying AI or launching retention programmes, companies need to understand their own workforce at the level of occupations and tasks. Aggregate headcount planning is no longer sufficient because the risks and opportunities sit within occupations, not only across them.



Map workforce risk by occupation and task

Identify which roles combine high or low replacement demand with high or low AI exposure, and supplement this with evidence on recruitment difficulties, expected business demand and critical skills.

Move from headcount planning to task-based planning

Separate roles into tasks, then ask whether each task will remain human, be supported by AI or be automated.

Use scenario planning for AI and demographic change

Model different speeds of AI adoption against known retirement curves and alternative demand paths. The aim is not to predict precisely, but to stress-test the workforce against plausible futures.

Define the strategic objective

For each priority area, clarify whether AI is intended primarily to protect scarce capacity, support growth, improve quality and speed, reduce costs or manage risk. The answer should shape investment choices and the measures used to judge success.

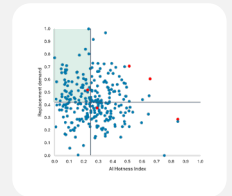
Layer 2: Apply a differentiated playbook

The four dynamics call for different priorities. The table below summarises the four workforce positions and their respective priorities. The following sections consider each in turn, setting out the actions companies can take in response. In practice, the right response will depend on a task-level diagnosis of the organisation’s own workforce and processes.

Workforce position	Primary challenge	Priority response
High replacement demand Low AI exposure	Persistent labour scarcity	Retain and expand the workforce, automate supporting tasks, improve job quality
High replacement demand High AI exposure	Scarcity and technological change	Redesign work, target capacity constraints, decide how capacity freed up will be used
Low replacement demand Low AI exposure	Limited immediate pressure	Monitor developments, invest selectively in productivity and skills
Low replacement demand High AI exposure	Adjustment pressure and changing skills	Redesign roles, create transitions, reskill and redeploy proactively

High replacement demand & Low AI exposure

In care, skilled trades, transport and other people-centred or physical work, AI can lighten the administrative load, but it cannot substitute for physical presence, manual skill, human judgement or direct interaction. This might change with advances in physical AI, but for now the response must be built around people.



Retain experienced workers longer

Introduce phased and flexible retirement, part-time re-engagement of retirees and working arrangements that make it attractive to stay beyond the traditional retirement age.

Capture knowledge before it walks out the door

With one in five workers reaching retirement age over the next decade, structured knowledge transfer and mentoring before departure become critical risk-management activities.

Expand the labour pool

Where domestic supply cannot meet demand, use targeted international recruitment and mobilise underused workforce potential, including returners, part-time workers and career changers.

Automate the supporting tasks, not the human core

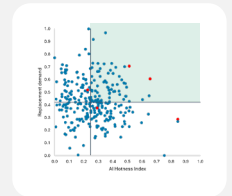
Use AI and, where relevant, robotics and assistive technologies, (e.g. exoskeletons, patient-monitoring tools etc.) to remove administrative and physical burdens, freeing scarce skilled workers for the core of the job.

Invest in the human premium

Because these jobs cannot be automated, their sustainability depends on working conditions. Address burnout, workload and job quality actively; for nurses and carers in particular, this is a workforce-supply issue rather than a soft benefit.

High replacement demand & High AI exposure

AI has the greatest potential to absorb part of the demographic pressure where both the replacement demand and AI exposure are high. It enables fewer people to manage larger workloads. In some cases, AI automation may even reduce total demand rather than merely relieve a shortage.



Redesign work before automating it

Adding AI to an unchanged process yields only marginal gains. Workflows should be re-engineered so that AI handles suitable routine work while people concentrate on judgement, coordination and relationships.

Prioritise AI where labour pressure is highest

AI investment should be directed first towards occupations and tasks that combine high replacement pressure with strong potential for AI support, where time saved can release genuinely scarce capacity.

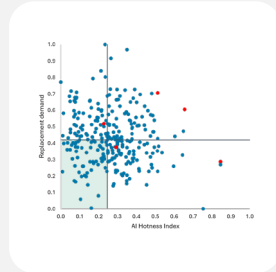
Reinvest freed capacity and capture the Jevons upside

Productivity gains should be treated as potential capacity for growth, higher service quality or previously uneconomic work, rather than automatically as a headcount saving. In some occupations, lower costs, better quality or additional capacity may expand demand rather than reduce it. Where AI is likely to reduce the total volume of work, companies should prepare transition pathways early.



Low replacement demand & Low AI exposure

Where occupations face less immediate pressure from both demographic change and AI exposure the appropriate response is vigilance rather than urgency



Monitor for change

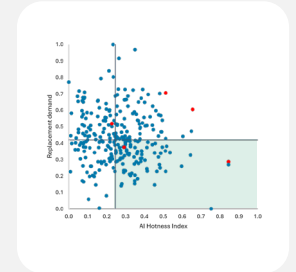
AI capabilities and adoption are moving quickly, while business demand can also shift. However, roles that appear relatively insulated today may not remain so and should be kept under review.

Invest selectively in long-term productivity and skills

Gradual process improvements and targeted upskilling remain worthwhile, even without acute pressure, but investment should reflect the strategic importance of the work.

Low replacement demand & High AI exposure

While lower replacement demand does not imply falling overall demand, it provides less cushioning as AI reshapes, and in some cases reduces the need for particular tasks, increasing adjustment pressure and the risk of stranded skills.



Create transition pathways for disrupted roles

Where AI reduces the volume of routine work, companies should proactively redeploy and reskill employees towards higher-value or adjacent roles rather than reacting after displacement occurs.

Upskill people to work with and oversee AI

As AI becomes more adept at creating output, workers will need to become proficient in reviewing, editing, quality-assurance and implementation. These activities will remain an important human contribution, although they will not preserve every existing role.

Layer 3: Build cross-cutting enablers

The following capabilities apply across all four workforce positions. Without them, even well-targeted actions are unlikely to deliver sustained results.

Build the digital foundations

Much of AI's potential is blocked by digital debt: paper-based workflows, manual approvals, fragmented systems, incomplete data environments and years of uncoordinated digitisation. Companies should prioritise high-impact process digitisation, improve data quality, rationalise their technology estate and embed security controls by design, so that AI becomes an integrated capability rather than another isolated layer.

Move from pilot to scale

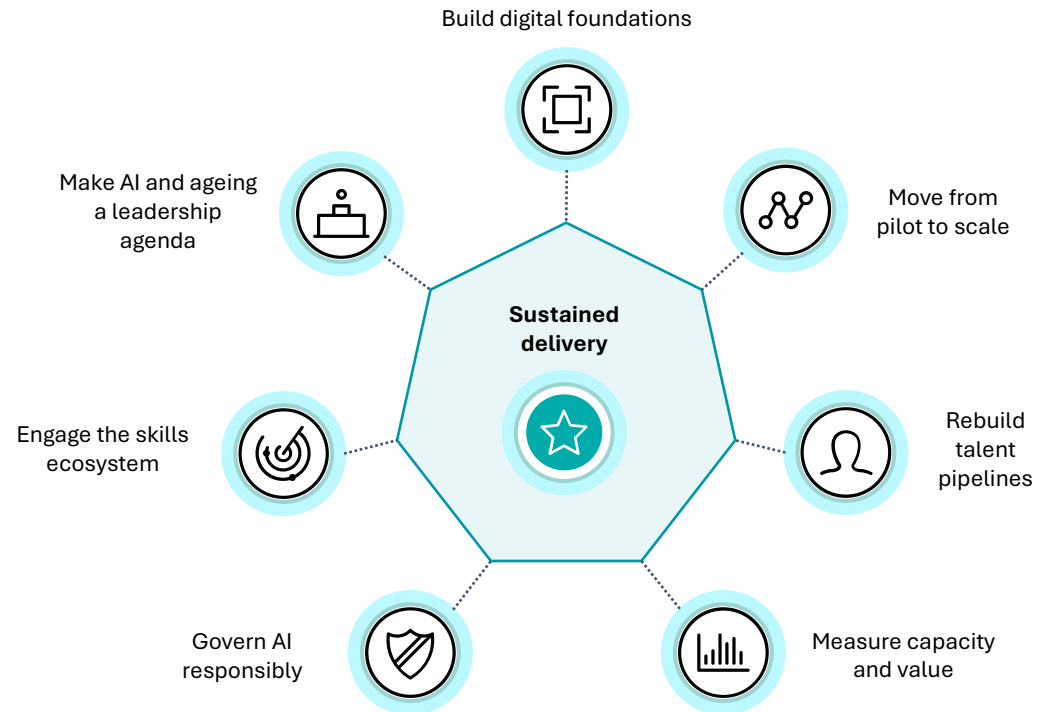
Much AI activity remains confined to pilots, isolated use cases and individual tools. Broad productivity gains emerge only when AI is embedded in core processes and owned as a product rather than run as a project. The move from pilot to scale should be an explicit programme with clear business ownership.

Rebuild talent pipelines

AI is eroding some of the entry-level tasks through which programmers, lawyers, translators and others have traditionally built expertise. Early-career development should be redesigned to deliberately expose juniors to complex work, apprenticeship-style learning and structured learning by reviewing AI outputs.

Measure capacity and value

To ensure return on investment companies should track whether AI is actually converting into useful capacity and value. A focused set of indicators could include time saved on priority tasks, quality and risk outcomes, time to competency for junior employees, retention in shortage occupations and the share of freed capacity reallocated to higher-value work.



The following capabilities apply across all four workforce positions. Without them, even well-targeted actions are unlikely to deliver sustained results.

Govern AI responsibly

To mitigate AI-associated risks companies must define who owns AI-supported work, who reviews and approves outputs as well as who is accountable when systems fail. Controls should be tailored to the occupational context and ensure that adoption supports employee trust rather than becoming a form of surveillance.

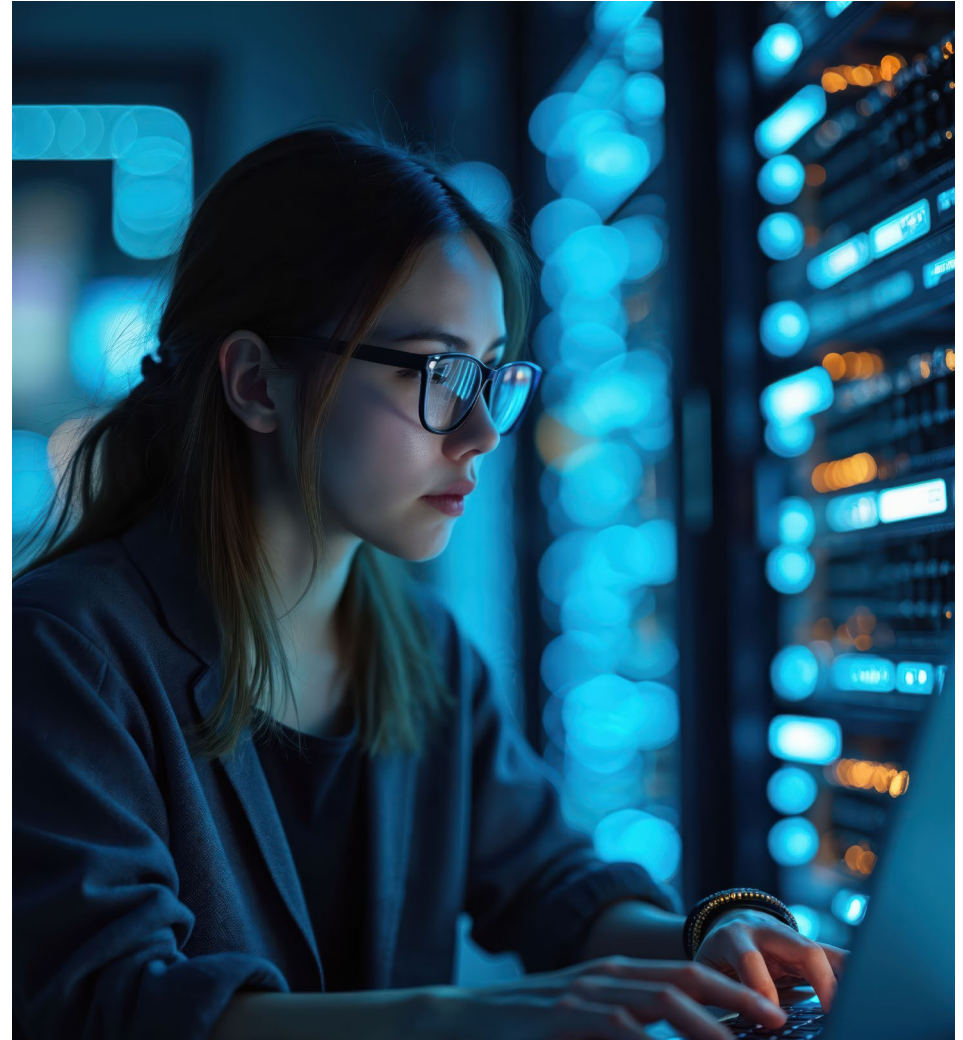
Engage the wider skills ecosystem

Shortages in care and the trades cannot be solved firm by firm. Companies should work with Switzerland's dual vocational-education system, industry associations and public bodies to expand training capacity and shape the future supply of skills.

Make AI and ageing a leadership agenda

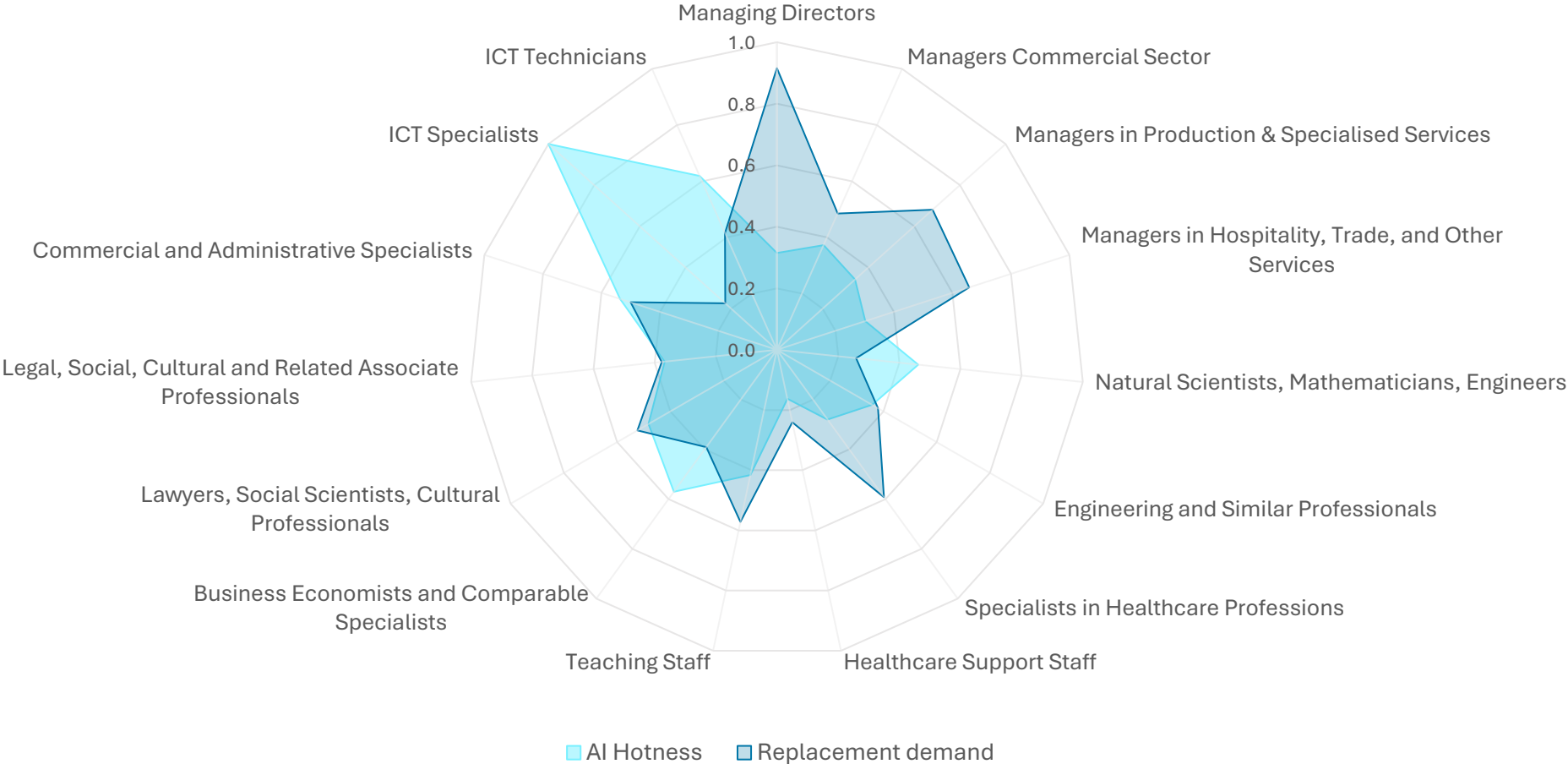
Demographic change and AI should be viewed as connected strategic business issues, with cross-functional ownership across the business, HR and technology, and clear backing from senior leadership and the board.

Competitiveness of companies will not depend on who adopts AI the fastest. Rather, it will depend on using AI where it can protect or expand scarce human capacity, preparing early where it creates adjustment pressure, and continuing to invest in the people and capabilities that technology cannot replace. In an ageing Switzerland, the companies that connect these decisions will be better placed to grow with a workforce that is changing as well as shrinking.

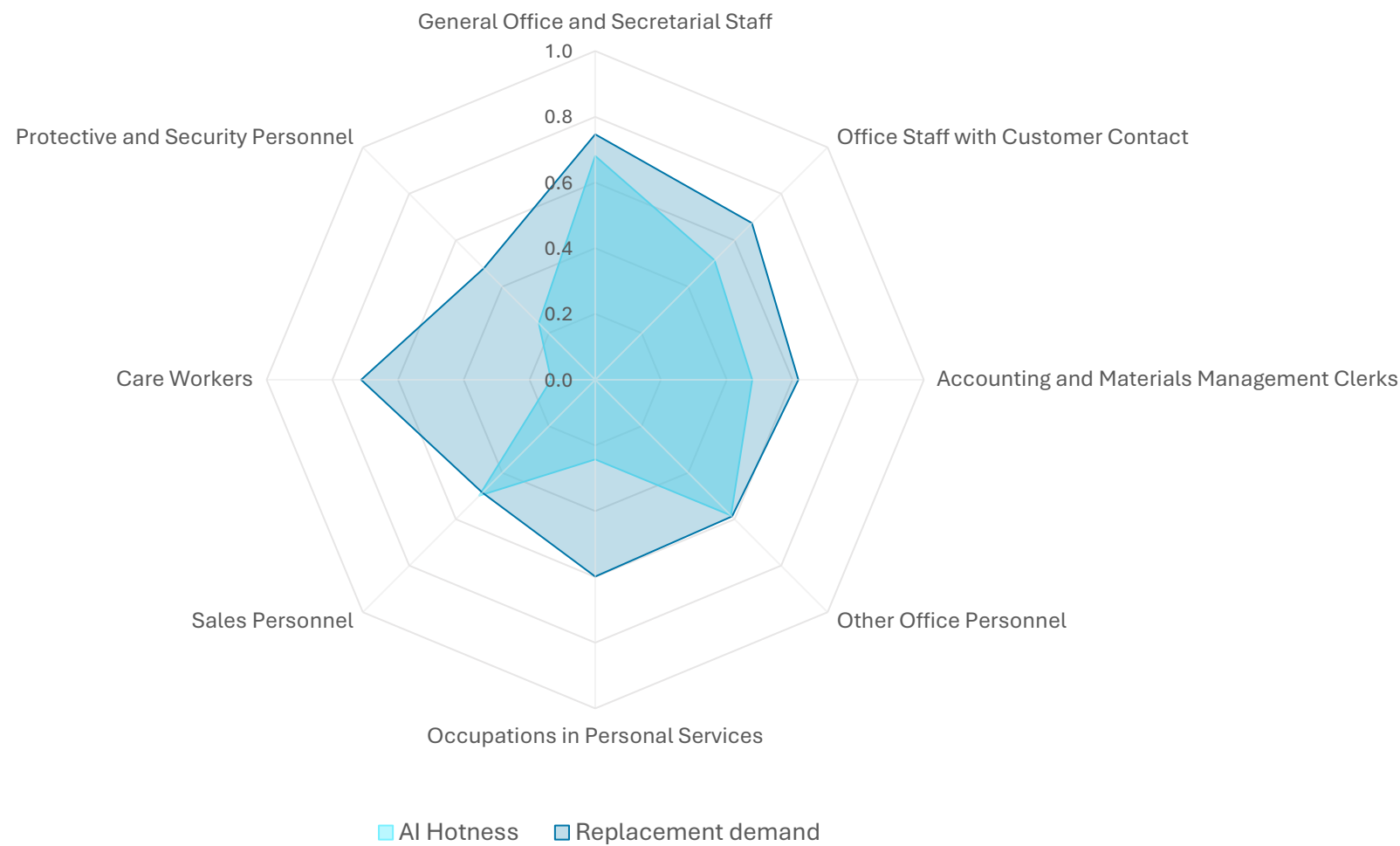


Appendix 1: Aggregated results by major occupational groups

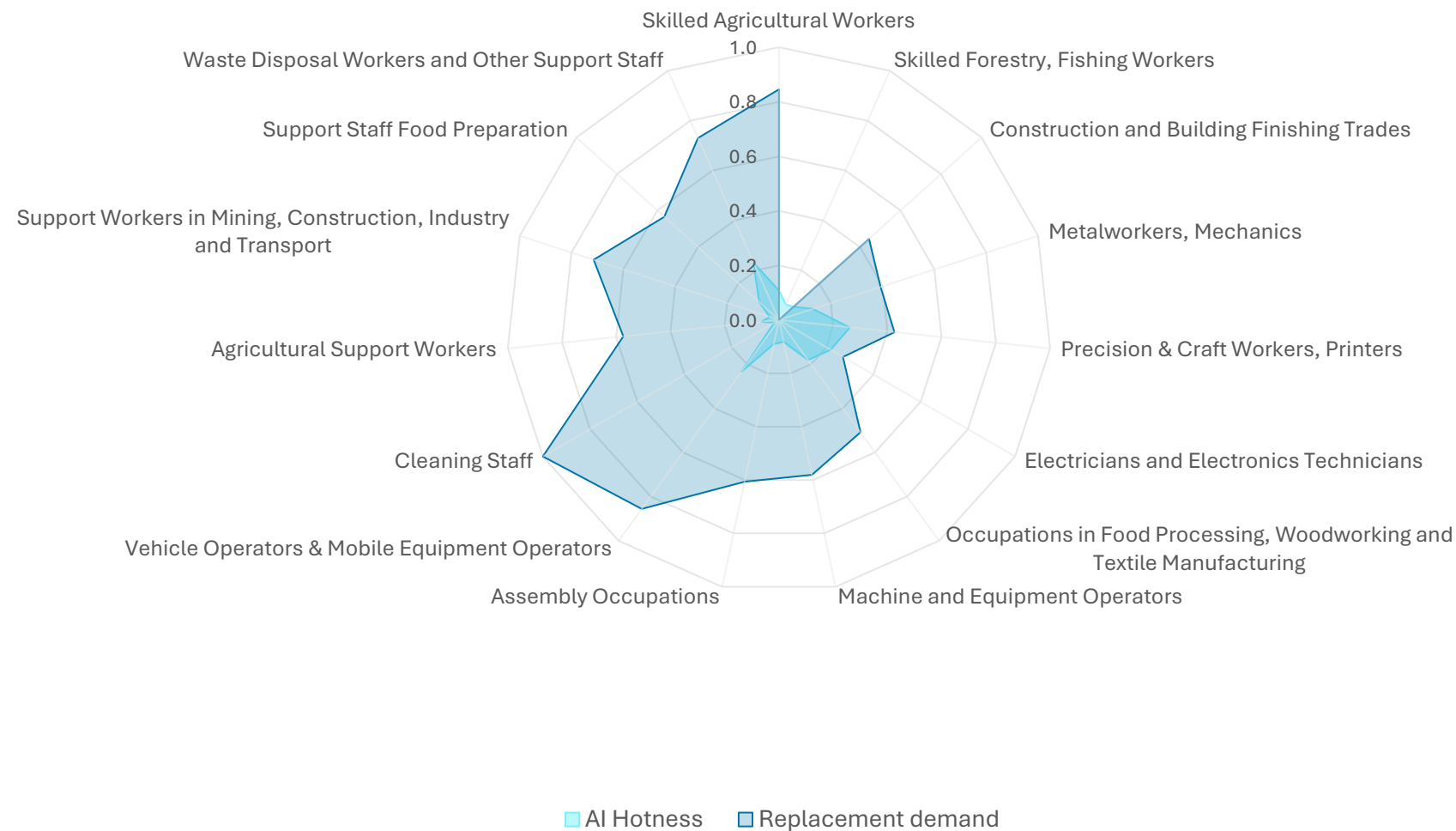
Managers, professionals and technicians



Administrative, service and sales



Manual and elementary professions



Appendix 2: Methodology

Data sources: Demographic replacement demand is based on the Swiss Federal Statistical Office (BFS) 2024 population survey. AI Hotness draws on three US-based sources: the Anthropic Economic Index (Handa et al., 2025),¹⁴ based on one million Claude.ai Free and Pro conversations collected in December 2024 and January 2025 and updated for this analysis with January 2026 data; Microsoft's Copilot applicability data (Tomlinson et al., 2025),¹⁵ covering US conversations from January to September 2024; and the LLM exposure estimates published by Eloundou et al. (2024).¹⁶

Replacement demand: We calculated replacement demand as the share of workers aged 55 and over in each Swiss occupation, using the BFS 2024 population survey. We then normalised this measure and ranked occupations by replacement demand.

Construction of the AI Hotness Index: The three measures capture complementary aspects of AI's potential impact on work. The Anthropic measure records observed AI use across occupational tasks. Microsoft's applicability score combines task coverage, task completion and impact scope, while weighting activities by their relevance and importance within each occupation. The LLM exposure score estimates whether LLMs could reduce the time needed to complete a task by at least 50% while maintaining or improving quality; tasks are weighted by type, importance and relevance. The scores are first mapped to Swiss occupations and then normalised to a common scale (0-1). The simple average of the three normalised scores forms the index.

Occupation mapping and sample: The AI sources originally use US O*NET and Standard Occupational Classification codes. We mapped these scores through the relevant crosswalks to ISCO-08, the classification used for Swiss occupations. Many-to-one mappings were aggregated, while one-to-many mappings were redistributed using employment weights where available and equal splits otherwise. The BFS data covers more than 460 occupations. For statistical reasons, however, we consider only occupations with a sample of more than 50 workers. This produces a sample of 310 occupations. Final mapping and data-availability checks reduce the comparable sample to 279 occupations.

Normalisation and classification: For the comparison of AI Hotness and replacement demand, both indicators are presented on a 0-1 scale, where higher values indicate greater AI exposure or replacement demand. The four labour-market groups use the median value of each indicator as the threshold between high and low.

Limitations: The AI evidence is based on US data and mapped to Swiss occupations, so it may not fully reflect Swiss occupational structures or AI adoption. Mapping assumptions introduce further uncertainty. Replacement demand is a static measure based on the current workforce and does not capture future changes in labour demand, migration, retirement behaviour or technology. Finally, AI usage and task exposure indicate potential rather than realised productivity gains or employment effects. The analysis focuses on LLMs and related digital applications, not physical automation or robotics.

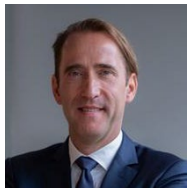
Contacts and authors



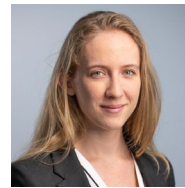
Antonio Russo
Managing Partner, Swiss
Innovation and AI Leader
+41 58 279 74 41
antorusso@deloitte.ch



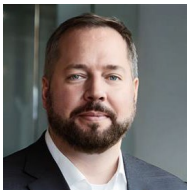
Dr. Michael Grampp
Chief Economist and
Head of Research
+41 58 279 68 17
mgrampp@deloitte.ch



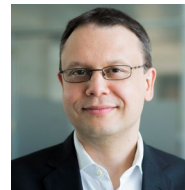
Matthias Thalmann
Human Capital Lead Partner
+41 58 279 7076
matthiasthalmann@deloitte.ch



Teresa Hug Alonso
Economist and Senior
Researcher
+41 58 279 6953
thugalonso@deloitte.ch



Marc Beierschoder
Swiss AI Market Lead Partner
+41 58 279 6778
msbeierschoder@deloitte.ch



Dennis Brandes
Economist and Senior
Research Manager
+41 58 279 65 37
dbrandes@deloitte.ch

Endnotes



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