Global Workforce Hopes and Fears Survey 2026

Chinese Mainland Report



November 2026

PwC takes the employee perspective to present a true picture of the AI-era workplace

WHY Hopes & Fears

This survey involves approximately 2,400 participants from Chinese Mainland (excluding Hong Kong, Macau and Taiwan) and is part of a global study of nearly 50,000 workers. The research aims to systematically track the authentic state of employees in terms of technology application, work motivation, organisational trust and emotional wellbeing following the deep integration of AI into the workplace. The report compares the pace of AI penetration and differences in organisational support in Chinese Mainland' s workplace with those globally and in other regions, to seize the initiative during the transformative period of AI adoption and deep organisational integration.

01



AI

02



Employee wellbeing

HOW should organisations respond

The report stresses that injecting AI into traditional operating models is far from enough; organisations must redesign work itself — redesigning job content, roles, workflows, incentives around effective human-AI collaboration, thereby systematically turning new technology into productivity, innovation and growth. To this end, the report proposes three key leadership moves:

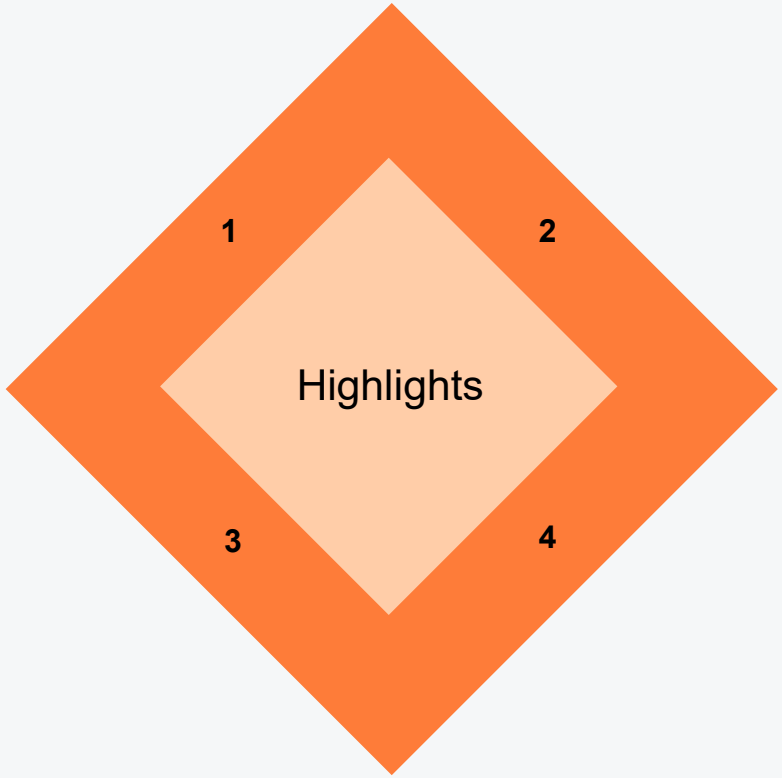
- Differentiate — identify where different employee groups start in their transformation, giving front-runners space for innovation and clear development pathways while building credible pathways for engine-room and other cohorts;
- Rewire — incorporate AI practice and skills growth into organisational incentives and governance frameworks;
- Empower — equip employees with skills, time and confidence, while strengthening frontline managers' change leadership, so that workforce transformation truly becomes the key to returns on technology investment.

Highlights

This survey, drawing on AI adoption in the workplace and employees' wellbeing perceptions, and connected by how organisations incentivise and support their people, presents a true picture of the Chinese Mainland workplace in the AI era.

- **Compared with the global and APAC averages, Chinese Mainland has been the first to achieve deep and widespread AI adoption at work, with leading openness and positive perceptions overall.** The Chinese Mainland workplace is steadily moving from a phase of tool introduction to a phase of human-machine collaboration.

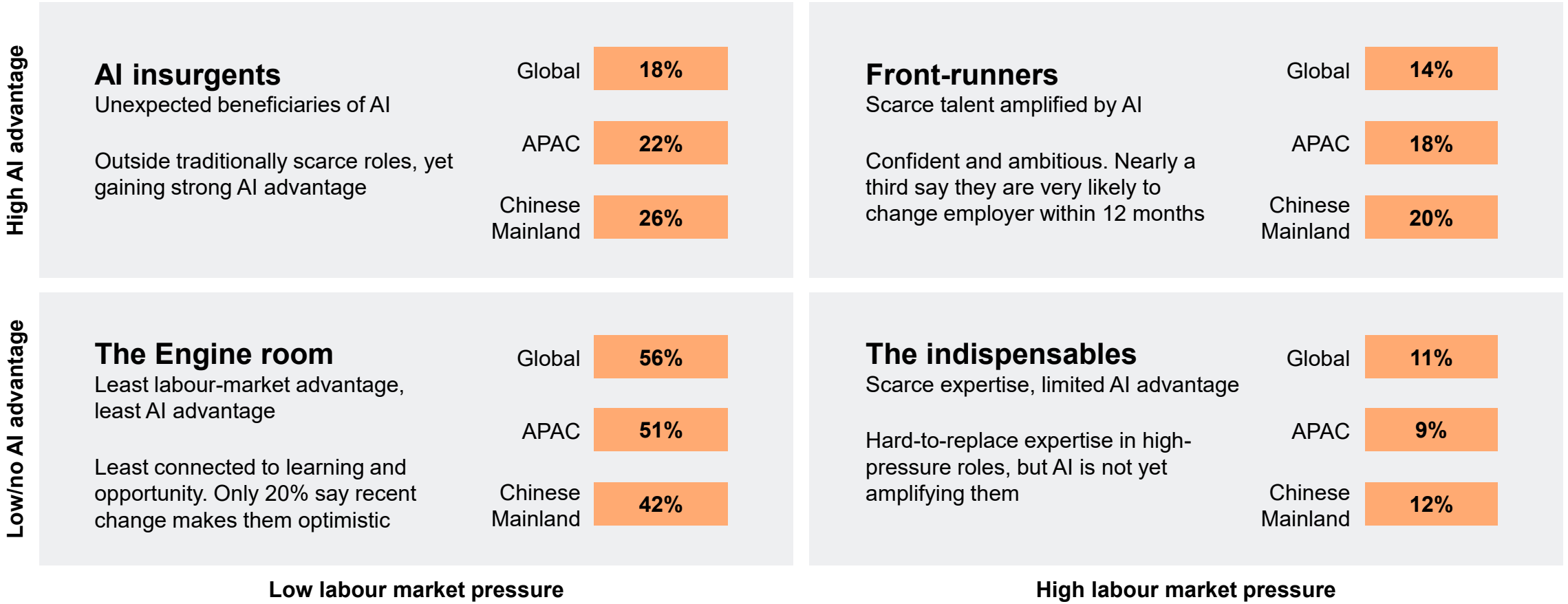
- **Front-runners and AI insurgents with strong AI advantages account for a higher share than the global and APAC averages, while engine-room workers, who still make up over 40% of the workforce, face dual gaps in skills and awareness.** This transition divide becomes a core governance challenge for organisations.



- Chinese Mainland employees possess higher work motivation and are more willing to go beyond for their role, while taking relatively less pride in their work. **Chinese Mainland employees' trust in top management has risen against the trend, emerging as a key confidence asset for for driving organisational change.**

- In addition, barriers to local AI adoption are extending from technical reliability towards organisational-side issues such as risk governance, organisational policies and employees' skills readiness. This places **higher demands on organisations' systemic governance** and offers a clear starting point for resilient transformation in the AI era.

Based on labour market pressure and AI advantages, the workforce splits into four distinct cohorts, with more Chinese Mainland employees having gained an AI advantage than the global and APAC averages and have emerged as beneficiaries of the AI wave



Chinese Mainland employees expect greater reward for AI practice, innovation and upskilling, and their tolerance toward mistakes during innovation is significantly higher than the global and APAC averages

Rewarded behaviours

The behaviours or outcomes that are most valued and rewarded in the workplace

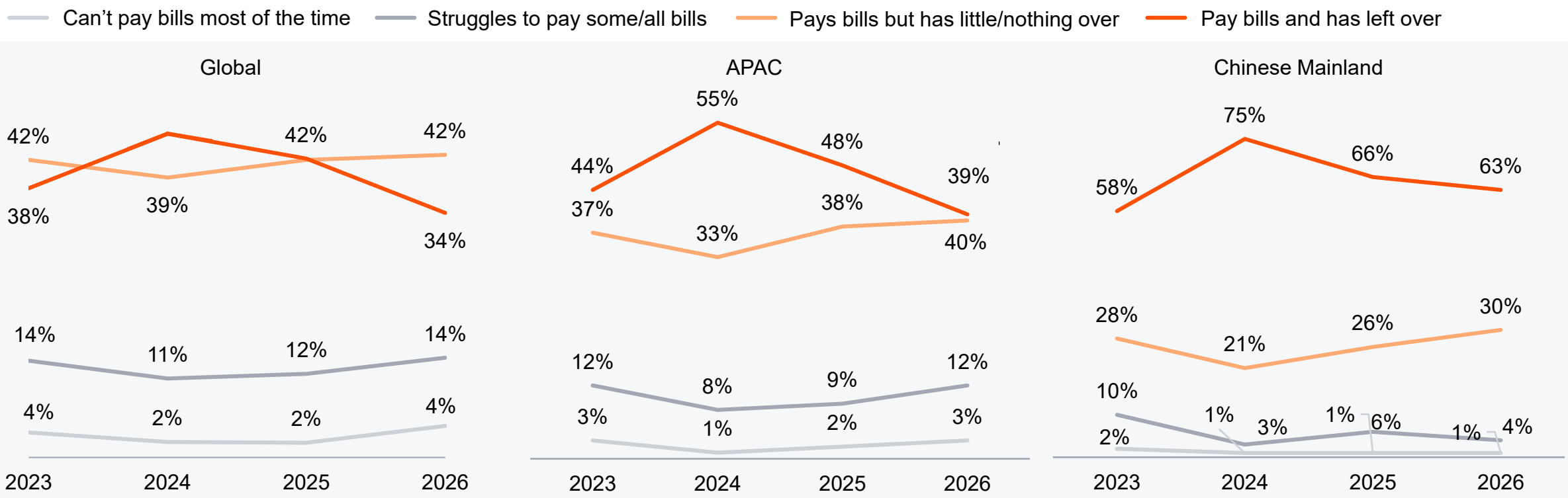
	Global	APAC	Chinese Mainland
Using AI effectively	12%	15%	↑20%
Challenging existing ways of work	15%	18%	↑20%
Learning new skills	21%	22%	↑24%
Avoiding mistakes and minimising risk	28%	28%	↓22%

Note: Q24. “What behaviours or outcomes are most valued and rewarded in your workplace in practice?” (Respondents were asked to select up to 3 options). Asked of all respondents. Global N=49,364; APAC N=17,230; Chinese Mainland N=2,408.

Chinese Mainland employees' household finances remain stable, with 63% having money left over in 2026—close to double the global level

Household finances

Share of respondents by financial situation

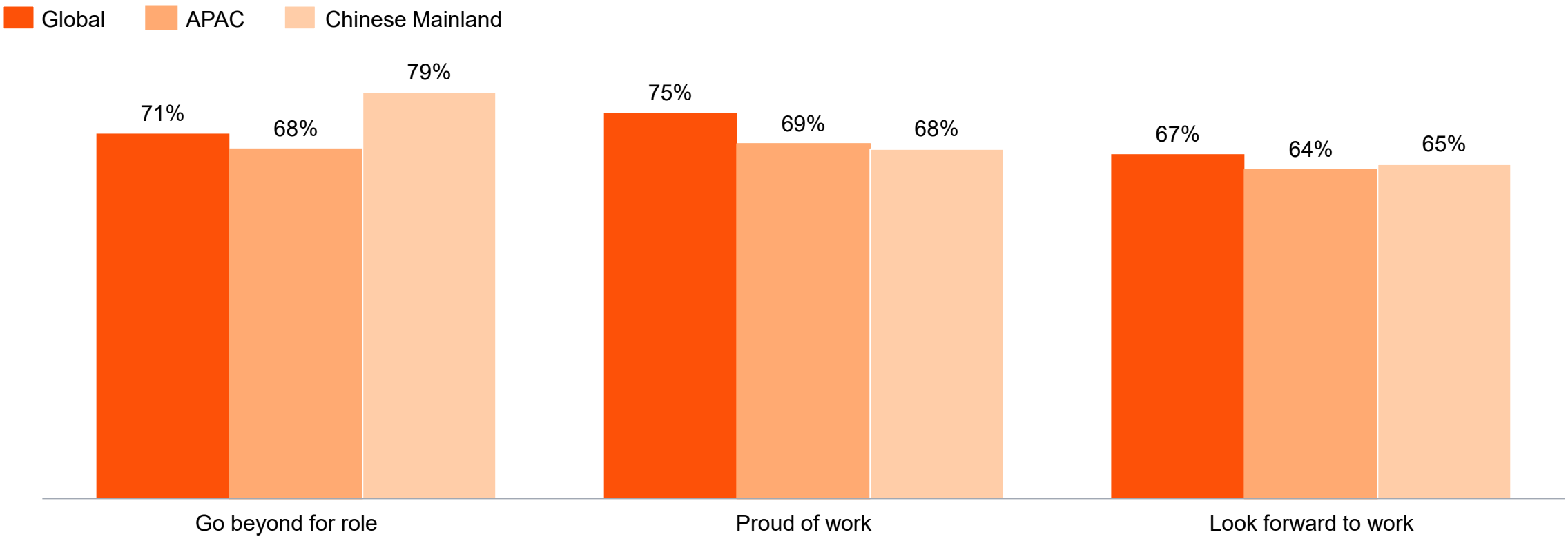


Note: Q52. "Which of the following best describes your current financial situation?". Asked to all respondents, excluding 'Prefer not to say'. Global 2023: Global N = 53,912; Global 2024: N= 56,600; Global 2025: N = 49,843; Global 2026:N = 49,364 APAC 2023 N=19,502; APAC2024 N=19,500; APAC 2025 N=17,622; APAC 2026 N=17,230 Chinese Mainland 2023 N=3,000; Chinese Mainland 2024 N=3,000; Chinese Mainland 2025 N=2,484; Chinese Mainland 2026 N=2,404

Chinese Mainland employees possess higher work motivation than the global and APAC, and are more willing to go beyond for their role

Worker motivation

Share of workers that feel the following about their jobs at least once a week

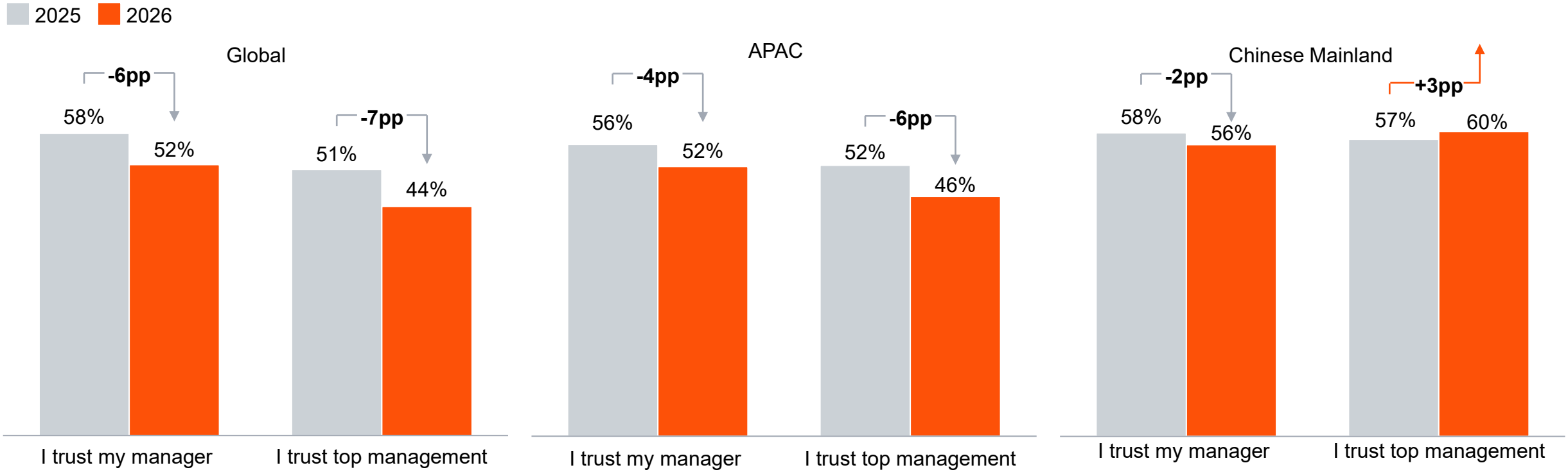


Note: Q10. “How often do you have the following feelings about your job? ” (Showing NET: ‘Often (once a week)’, ‘Very often (a few times a week)’ or ‘Always (every day)’ responses). Asked of all respondents; Global N=49,364, APAC N=17,230, Chinese Mainland N=2,408

Trust in management is falling globally, Chinese Mainland employees' trust in top management has risen against the trend to become the highest among the global and APAC

Trust in management

Share of workers who moderately or strongly agree with the following statements about their management

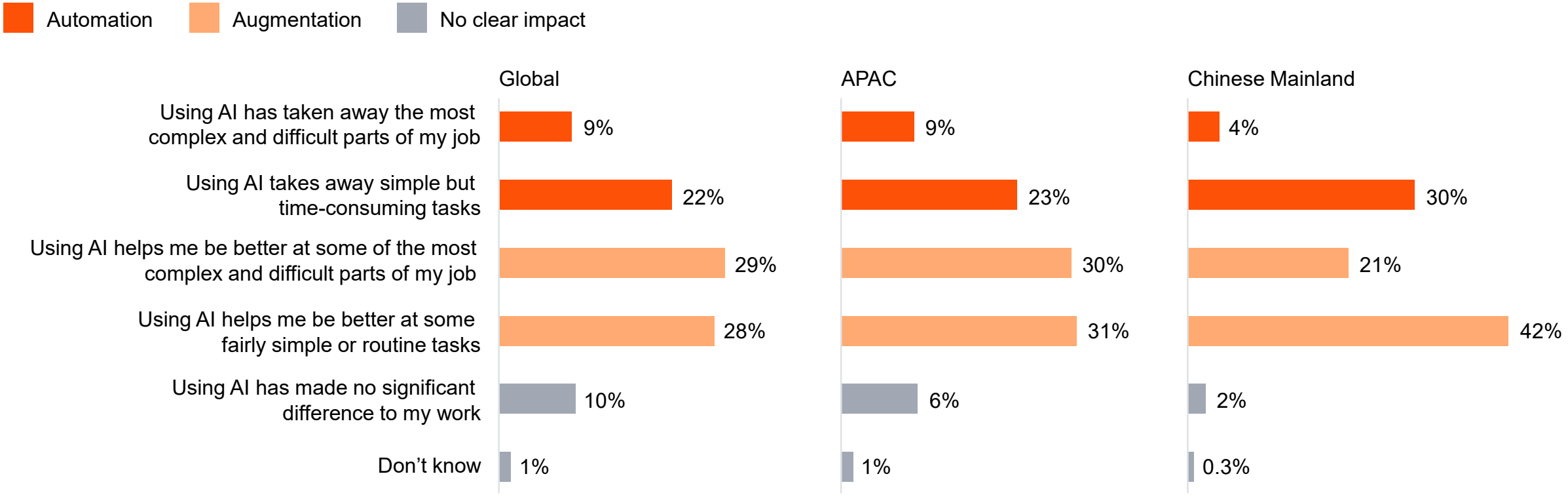


Note: Q30,Q32.1. "To what extent do you agree or disagree with the following statements? "(Showing NET: Moderately/Strongly agree responses). Asked of all respondents, 2025 Global N=49,843; 2025 APAC N=17,622; 2025 Chinese Mainland N=2,484; 2026 Global N=49,364; 2026 APAC N =17,230; 2026 Chinese Mainland N=2,408

Only 2% of Chinese Mainland employees believe that AI has had no significant impact on their work, with most viewing AI as augmentation rather than automation

AI impact on work

Share of workers identifying how AI has changed their work over the last 12 months

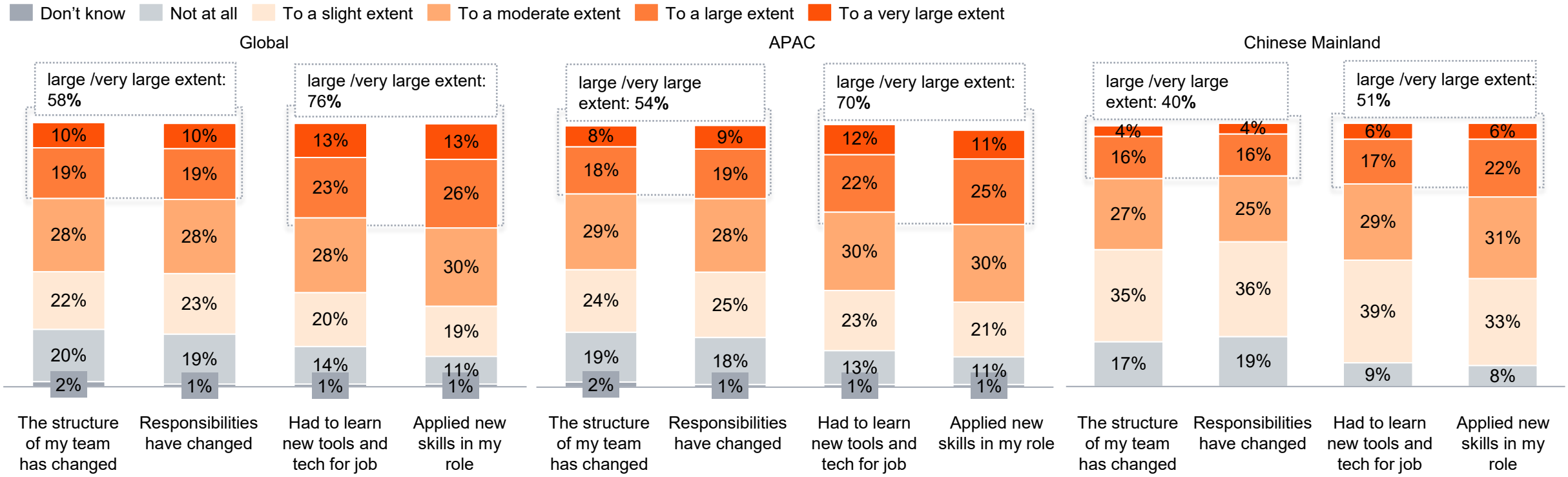


Note: Q38. "Thinking about how AI has changed the way you do your job, which statement is most accurate? " Asked to respondents that answered 'Yes' to using AI at work in the past 12 months; Global N=31,378; APAC N=12,472; Chinese Mainland N=2,518

51% of Chinese Mainland employees applied new skills to a large or very large extent, with 40% experiencing changes to team structure and job responsibilities, a more cautious pace of change than the global and APAC

Application of new skills

Extent to which respondents experienced each of the following changes in the last 12 months

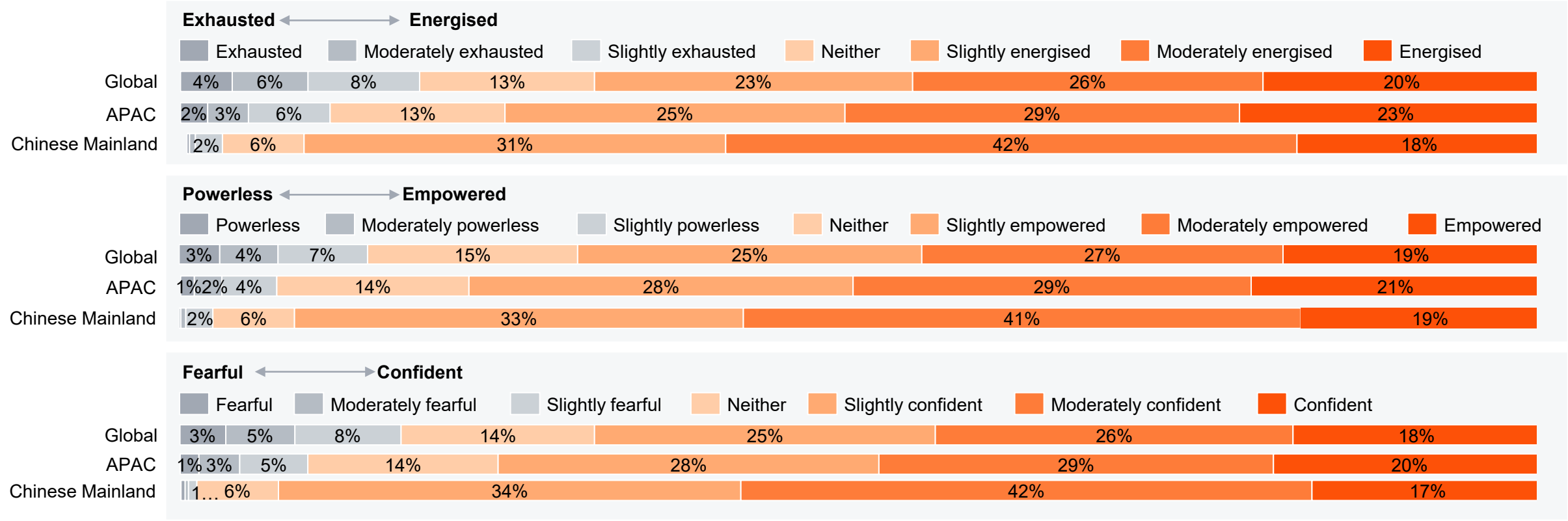


Note: Q25. "To what extent, if any, do the following statements describe changes you have experienced in your role in the last 12 months? "Asked of all respondents, Global N= 49,364; APAC N= 17,230; Chinese Mainland N= 2,408

91% of Chinese Mainland employees feel confident and 93% energised and empowered, only 2% feel exhausted and powerless, while 1% feel fearful, with fewer negative feelings than the global and APAC

Feelings about AI usage

Share of workers identifying the feelings brought by increased AI usage at work



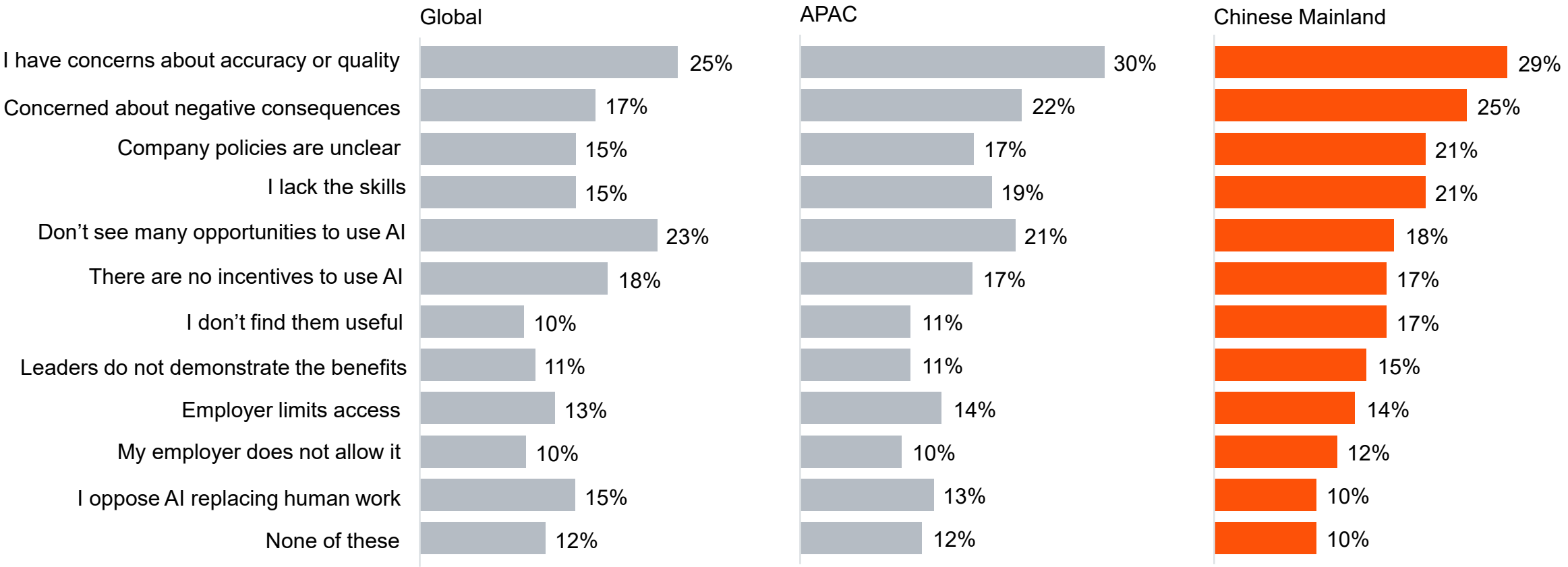
Note1: Q41-Q43. “How does the increasing use of AI in your job make you feel?” (Only asked to respondents that answered “Increase Slightly”, “Increase Moderately” or “Increase Significantly” regarding the usage of AI tools at work over the next 12 months (Q40)); Global N=29,347; APAC N=11,274; Chinese Mainland N=1,626

Note2: Some values for Chinese Mainland are not shown in the chart due to rounding. The underlying values are: Fearful, 0.19%; Moderately Fearful, 0.43%; Exhausted, 0.12%; Moderately Exhausted, 0.37%; Powerless, 0.31%; Moderately Powerless, 0.24%

Accuracy or quality are the common top barriers, with Chinese Mainland employees are more concerned about negative consequences, company policies and skills lack

Barriers against AI usage

Share of workers identifying the following as the biggest barriers to AI usage at work



Note: Q39. “What are the biggest barriers preventing you from making more use of AI in your work?” Asked of all respondents, Global N=39,364, APAC N =17,230, Chinese Mainland N=2,408

What could this mean for the priorities already on your agenda

Get more value from AI

Our research shows

AI use is increasing rapidly—but meaningful AI advantage is distributed unevenly.

Explore

Which high-value workflows need to be redesigned around AI?

Grow and reinvent

Our research shows

Workers are already adapting, while access to learning and future capability is struggling to keep pace.

Explore

Which growth priorities depend on capabilities you don't yet have at scale?

Build resilience

Our research shows

Trust, readiness and capacity for change vary substantially—and managers are under pressure too.

Explore

Where is the organisation under greatest strain from the amount and pace of change?

Optimise cost and productivity

Our research shows

The engine room remains central to delivery, while burnout, financial pressure and uneven AI advantage can constrain productivity.

Explore

Which productivity initiatives are genuinely changing how work gets done?

Three leadership moves can help close the gap

Organisations need to catch up - and not leave the Engine room workforce behind.

The issue		The leadership move
Different parts of the workforce are starting from very different positions.	**Differentiate**	Understand the needs, value and risks within different workforce groups. Stretch and retain front-runners while building credible pathways for the engine room and other cohorts.
Workers are rapidly increasing AI use, but work has not been redesigned around it.	**Rewire**	Redesign work, roles, workflows, incentives and decision rights around effective human–AI collaboration - rather than measuring success simply through AI deployment or adoption.
People are adapting, but skills, trust and management capacity are not always keeping pace.	**Empower**	Give people the skills, time and confidence to adapt - and equip managers to lead them through change.

The workforce is moving. The organisational opportunity is to make sure work, capability and leadership move with it.

Contacts



Wilson Chow
AI Leader,
PwC China
+86 (755) 8621 8886
wilson.wy.chow@cn.pwc.com



Jasper Xu
Consulting Markets Leader,
PwC China
+86 (21) 2323 3405
jasper.xu@cn.pwc.com



Julius Shen
Lead Partner
PwC Strategy& China
+86 (21) 2323 2273
julius.shen@strategyand.cn.pwc.com



Liuyang Li
Partner
PwC Strategy& China
+86 (10) 6533 5845
liuyang.li@cn.pwc.com

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