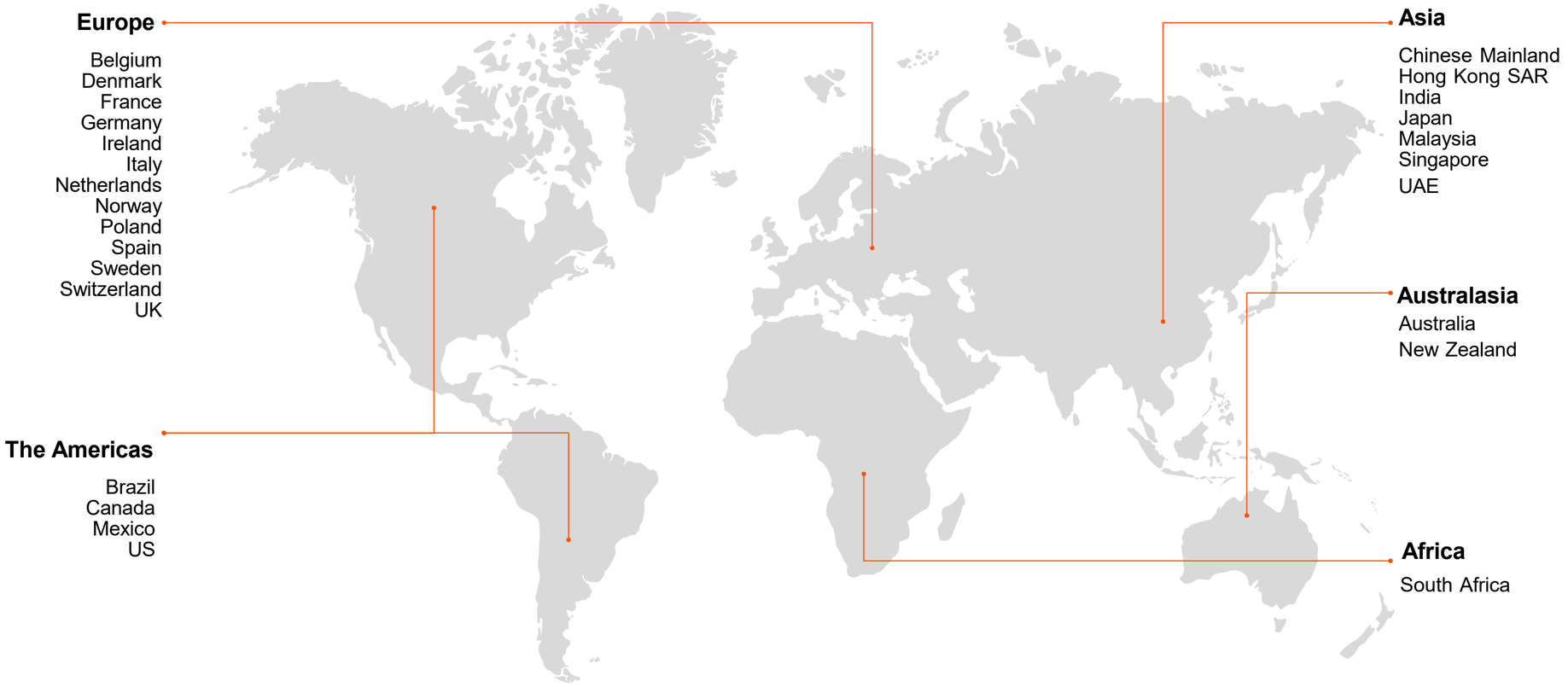
Two Futures for Jobs in an AI era

2026 Global AI Jobs Barometer

Chinese Mainland Analysis

The 2026 AI Jobs Barometer examines over one billion job ads from 6 continents to reveal how AI is affecting jobs, skills, wages, and labour productivity



Key findings

AI is driving productivity, accelerating skills change and starting to create a redesign of entry level work

AI is strongly linked to significant productivity gains

Since 2022 when AI use soared, companies in the sectors most exposed to AI have tripled their lead in workforce productivity growth over the least AI-exposed companies.

Companies achieving the biggest productivity gains are boosting wages and headcount

Rather than replacing jobs at scale, leading organisations are using AI to amplify human performance and create value.

Harnessing AI is accelerating skills transformation

Skills required for the most AI exposed jobs are changing twice as fast as in least exposed roles - a 75% increase over last year's gap.

Redesigned entry level pathways

AI exposed junior roles are 7x more likely (than the least AI exposed junior roles) to demand traditionally senior skills like leadership and strategic thinking.

A two-track labour market

Jobs professionalised by AI – where AI does the basic work leaving more expert tasks for people (22% of advertised jobs) - are thriving while jobs democratised by AI – where AI takes on the complex work (52% of advertised jobs) - fall behind.

40%

Productivity growth is 40% higher at most vs least AI exposed companies.

52%

The most AI exposed companies see faster headcount growth than the least AI exposed (52% vs 36%) and higher wage growth (24% vs 17%).

2.5x

The most AI exposed jobs are adding tasks that rely on human-intensive skills like empathy, judgment and creativity 2.5x faster - than the least AI exposed roles.

35%

AI-exposed 'seniorised' entry level roles are thriving with 35% growth since 2019 while other entry level roles decline in number.

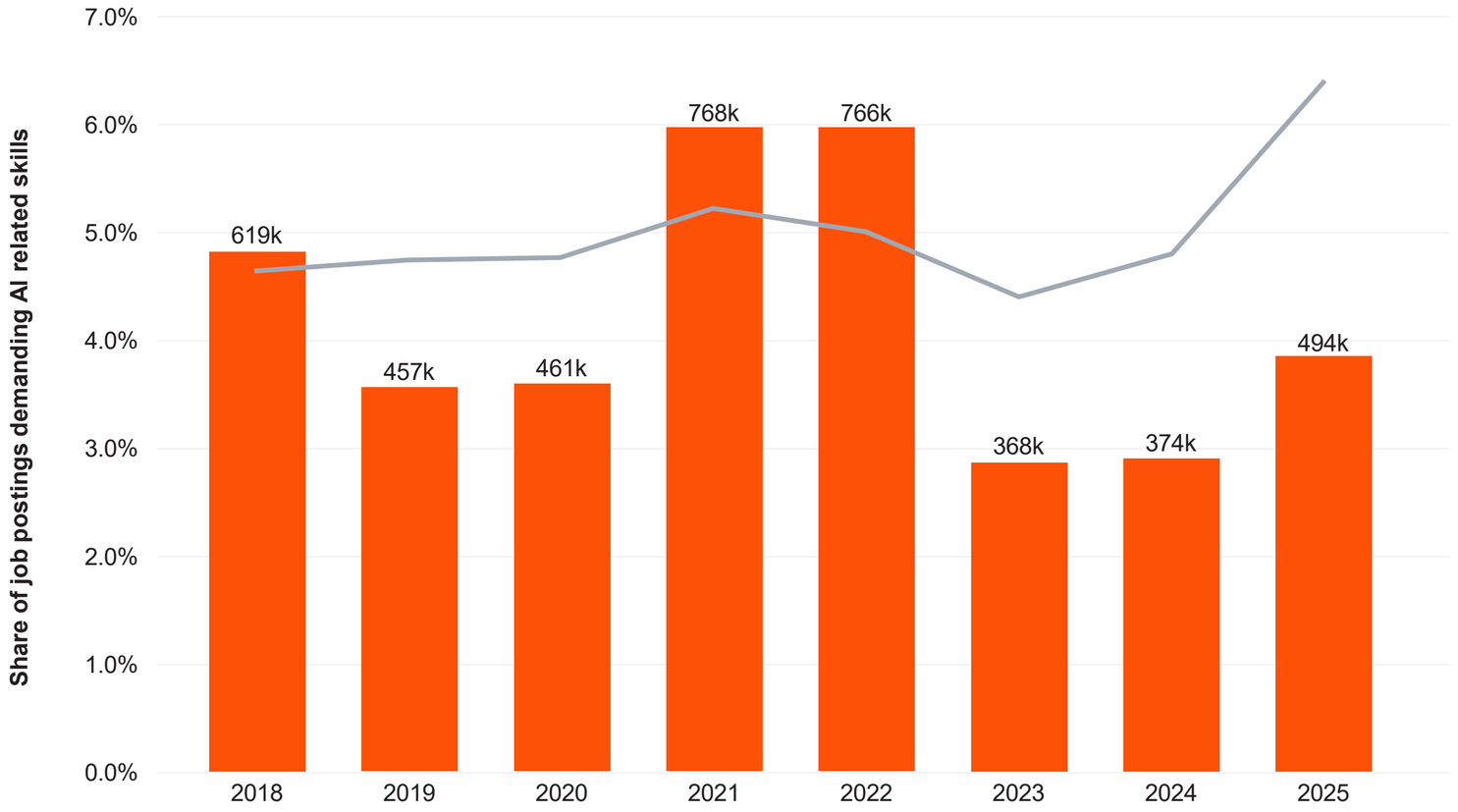
42%

Professionalised jobs are growing twice as fast as democratised jobs with 42% higher wage growth since 2021.

Chinese Mainland Insights

AI hiring in Chinese Mainland has rebounded slightly in 2025 but remains below its 2021 and 2022 peak levels

Total number and share of job postings requiring AI related skills, Chinese Mainland, 2018-2025



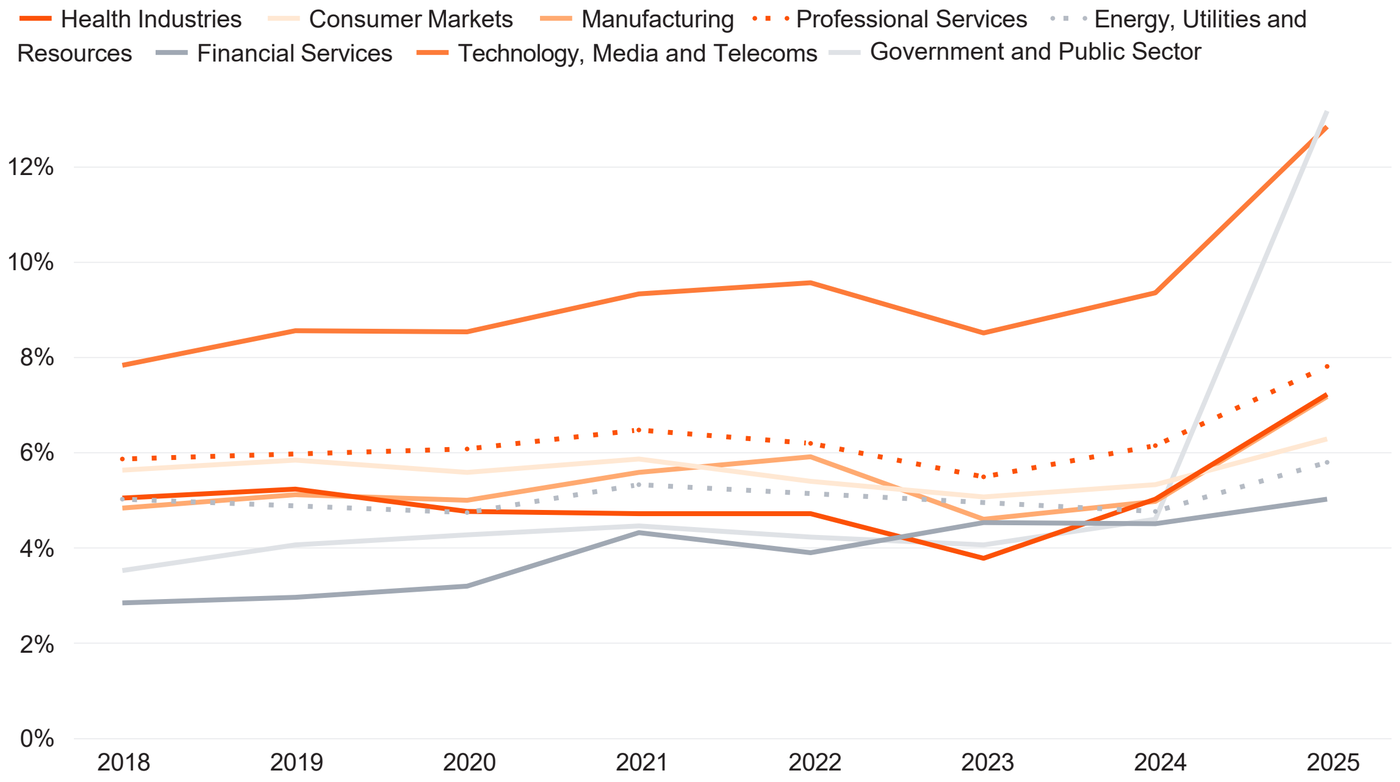
Source: PwC analysis, Lightcast data
Notes: Chinese Mainland has a large informal labour market. Therefore, job postings data may only provide a partial representation of its labour market.

Findings

- The number of AI job postings had the boom in 2021 and 2022, while the number fell sharply in 2023, which is primarily driven by a broad pivot in high-AI-demand industries from aggressive expansion to cost optimization and efficiency gains.
- While Chinese Mainland remains significantly lower in terms of volume of AI job postings compared to its 2021 and 2022 peak levels, the share of AI job postings has continued to edge upwards, reaching 6.4% in 2025,which is jointly driven by breakthroughs in AI technology and accelerated adoption across all sectors.

AI hiring intensity is rising across all sectors in Chinese Mainland and has been led by TMT, with Government and Public Sector overtaking TMT in 2025

Share of AI job postings within each sector, Chinese Mainland, 2018-2025



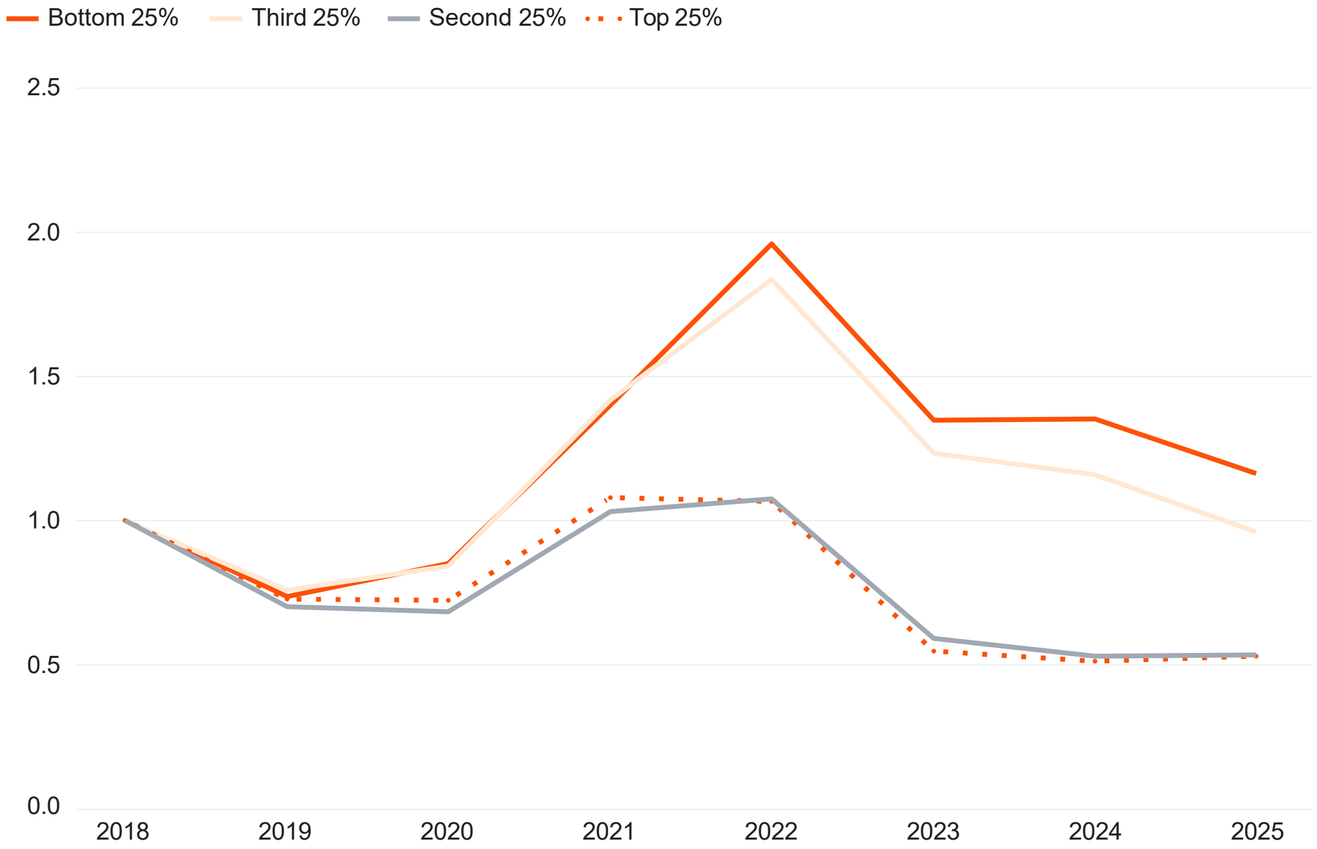
Source: PwC analysis, Lightcast data
Notes: : 1. The sector names have been labelled in order of the share of job postings in 2025. 2. Chinese Mainland has a large informal labour market. Therefore, job postings data may only provide a partial representation of its labour market.

Findings

- While Technology, Media and Telecoms (TMT) has recorded the highest share of AI job postings in Chinese Mainland over the majority of the time-period analysed (with 10.7% in 2025), the Government and Public Sector sharply overtook this in 2025, increasing to 11%. This is largely due to the sector's smaller total AI job posting, which amplifies the impact of AI job growth on its posting share.
- All sectors saw an increase in AI job share in 2025, pointing to broad-based growth in AI hiring.
- This suggests AI adoption in Chinese Mainland is expanding across the economy, rather than being concentrated in a small set of industries.

In Chinese Mainland, job postings have grown faster in less AI-exposed occupations since 2018

Number of job postings relative to 2018 by AI exposure quartile, Chinese Mainland, 2018-2025



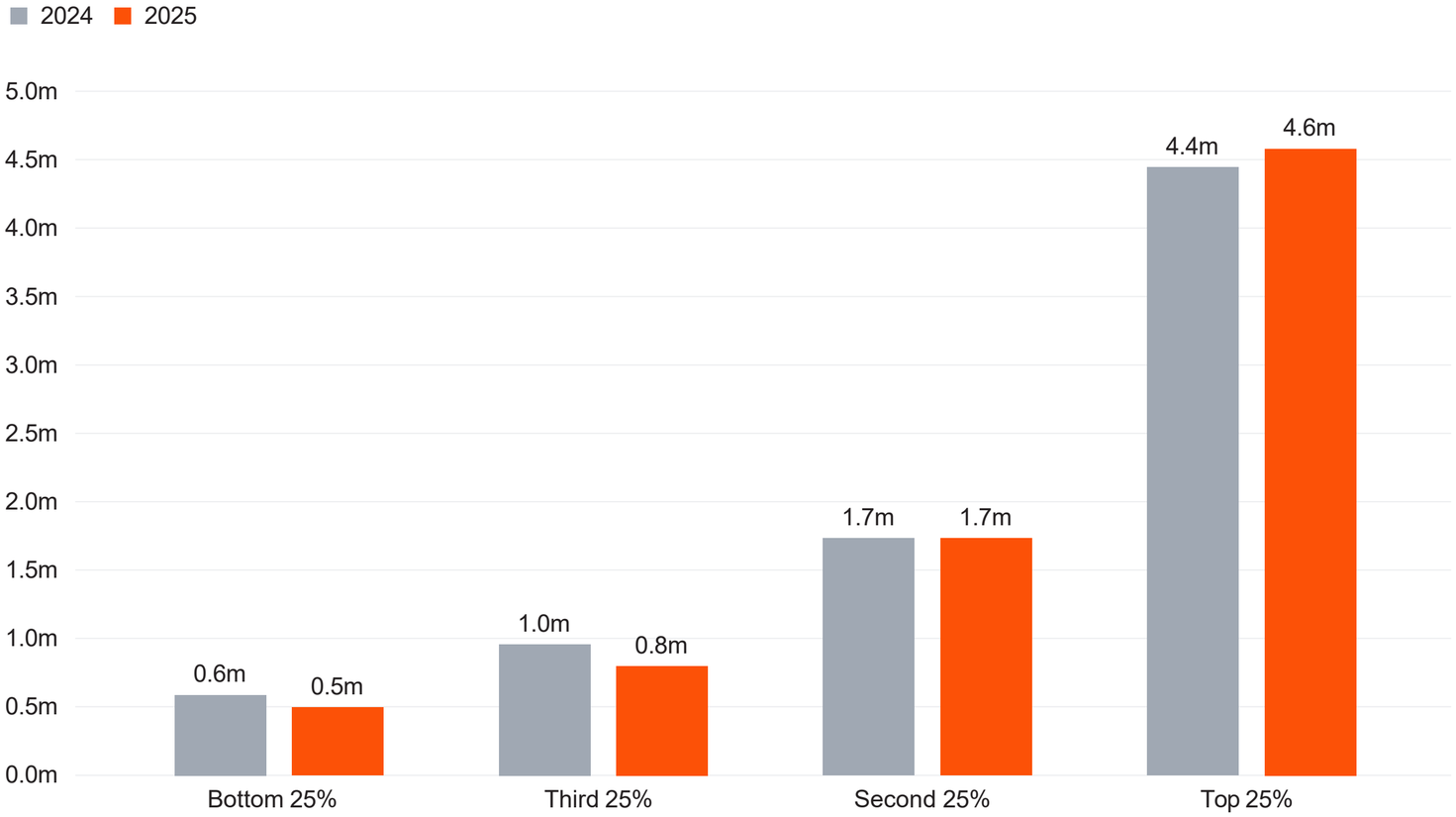
Source: PwC analysis, Lightcast data
Notes: 1. Chinese Mainland has a large informal labour market. Therefore, job postings data may only provide a partial representation of its labour market. 2. Occupations are grouped into quartiles based on the PwC AI Occupational Exposure (AIOE) Index, which measures the degree to which each occupation's tasks and abilities can be performed by current AI systems. For a full explanation of the index construction, see the 2026 Global AI Jobs Barometer, Appendix 1a.

Findings

- Since 2018, less exposed occupations show modest growth in job postings, while higher exposure quartiles have declined. By 2025, the lowest exposure quartile has around 1.16 postings for every posting in 2018, compared to 0.53 in the highest exposure quartile.
- Growth across all quartiles has slowed since the 2022 peak.

However, the top quartile of AI exposed occupations still accounts for the largest number of job postings in Chinese Mainland

Total number of job postings by AI exposure quartile, Chinese Mainland, 2024 and 2025



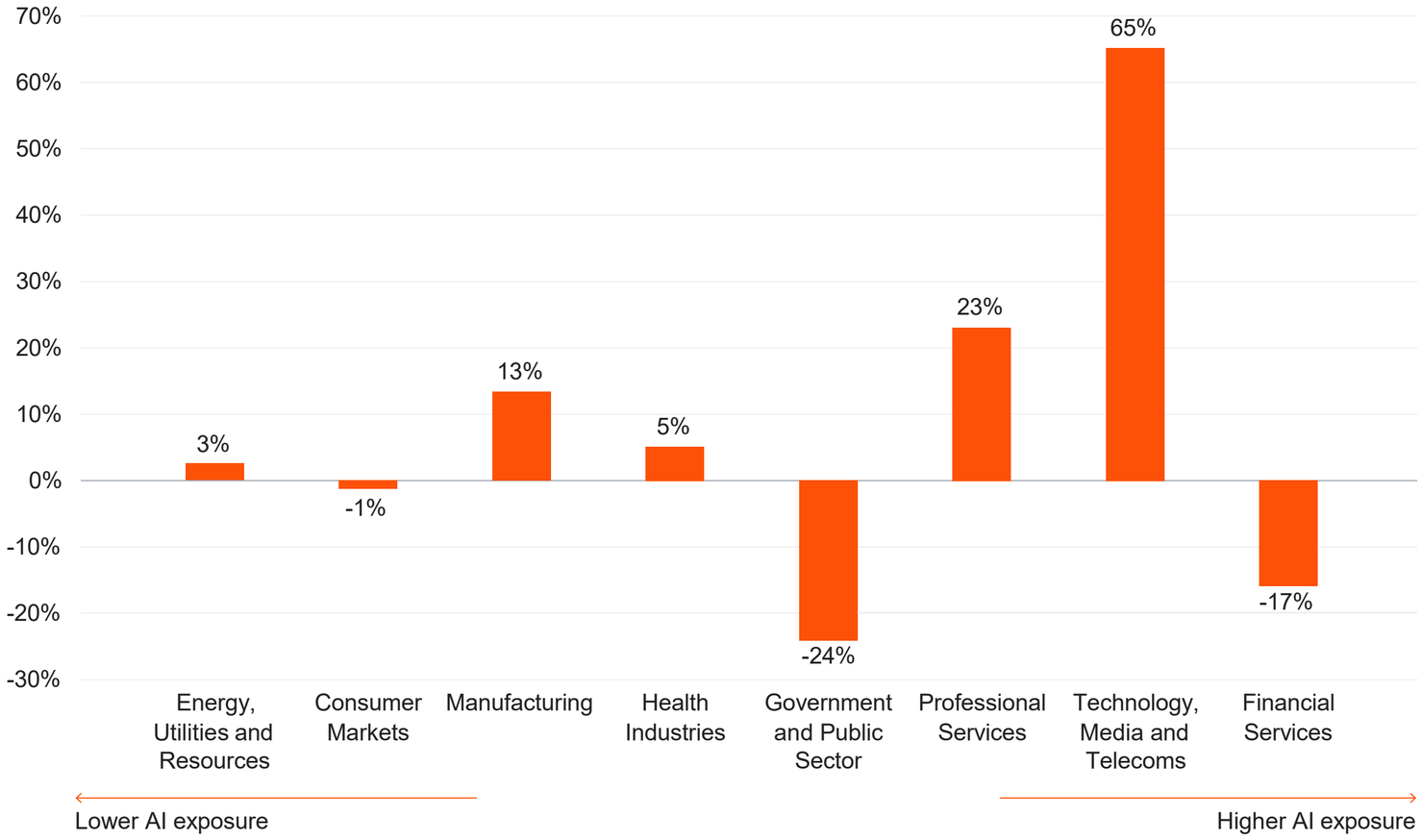
Source: PwC analysis, Lightcast data
Notes: Chinese Mainland has a large informal labour market. Therefore, job postings data may only provide a partial representation of its labour market.

Findings

- While job postings have grown faster in less AI-exposed occupations, highly exposed roles still account for the largest share in absolute terms.
- In 2025, the most AI-exposed quartile recorded around 4.6 million job postings, higher than lower exposure groups. This reflects a data limitation in the Chinese Mainland, where job postings data is more representative of formal sectors such as Financial Services, Professional Services, and technology, which are also more likely to be AI-exposed, while less exposed occupations are more prevalent in less formal parts of the labour market and are underrepresented.
- Between 2024 and 2025, the highest exposure quartile saw an increase in postings, while lower exposure quartiles declined.

AI wage premiums in Chinese Mainland vary significantly across sectors, with TMT recording the highest premiums

Wage premium by sector, Chinese Mainland, 2025



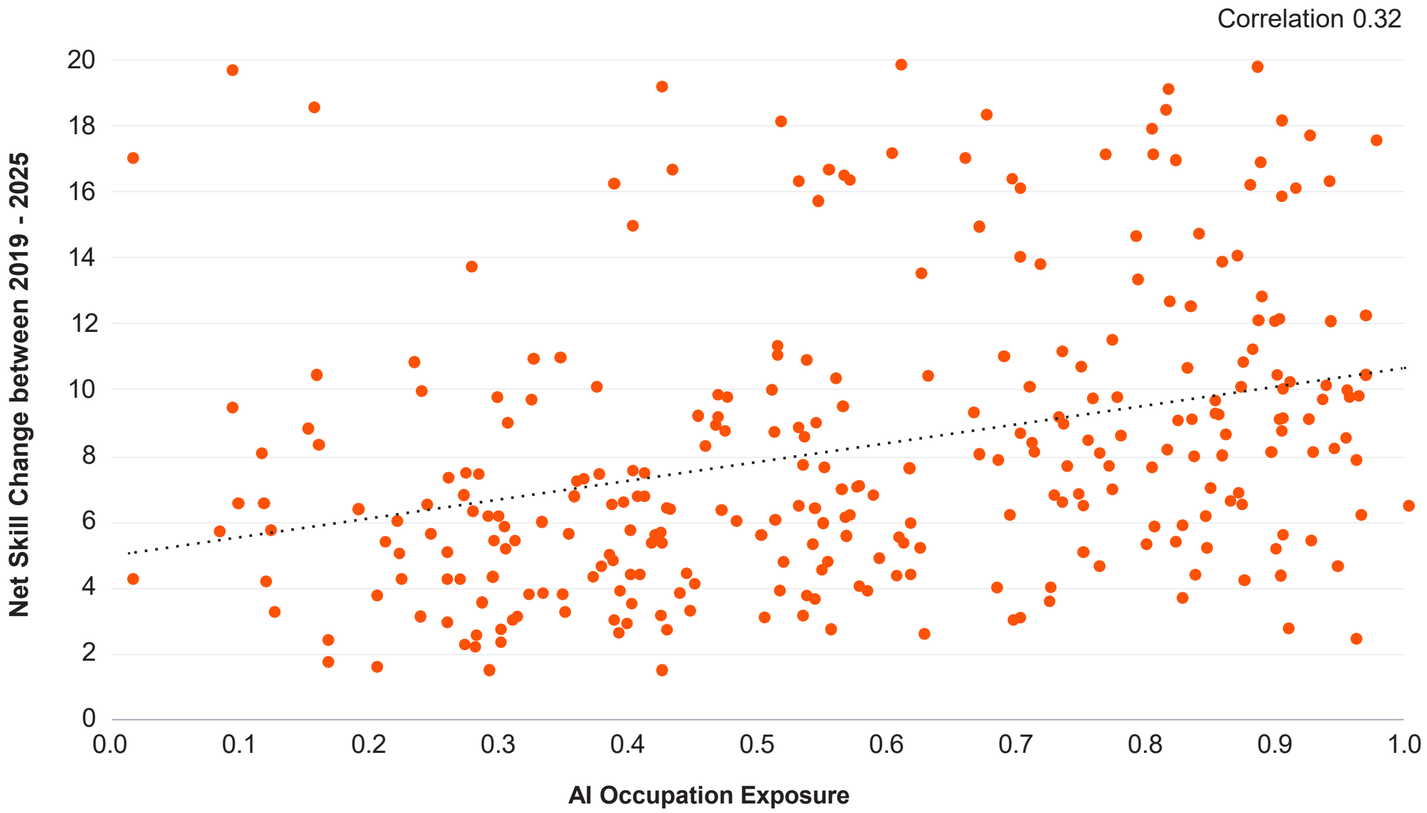
Source: PwC analysis, Lightcast data
Notes: Chinese Mainland has a large informal labour market. Therefore, job postings data may only provide a partial representation of its labour market.

Findings

- AI wage premiums in Chinese Mainland vary significantly across sectors, indicating no clear relationship emerges between AI exposure and wage premiums.
- Technology, Media and Telecoms (TMT) stands out with the highest premium, reflecting the value placed on AI skills in more specialized roles where they remain relatively scarce.
- In contrast, Financial Services and the Government and Public Sector shows a negative premium, where the highest-paying roles are defined by seniority and experience rather than AI skills, and AI requirements appear concentrated in more junior level positions.

In Chinese Mainland, more AI-exposed occupations tend to experience faster rates of skills transformation

Net skill change from 2019 to 2025 for 4-digit ISCO code occupations by AI occupation exposure, Chinese Mainland



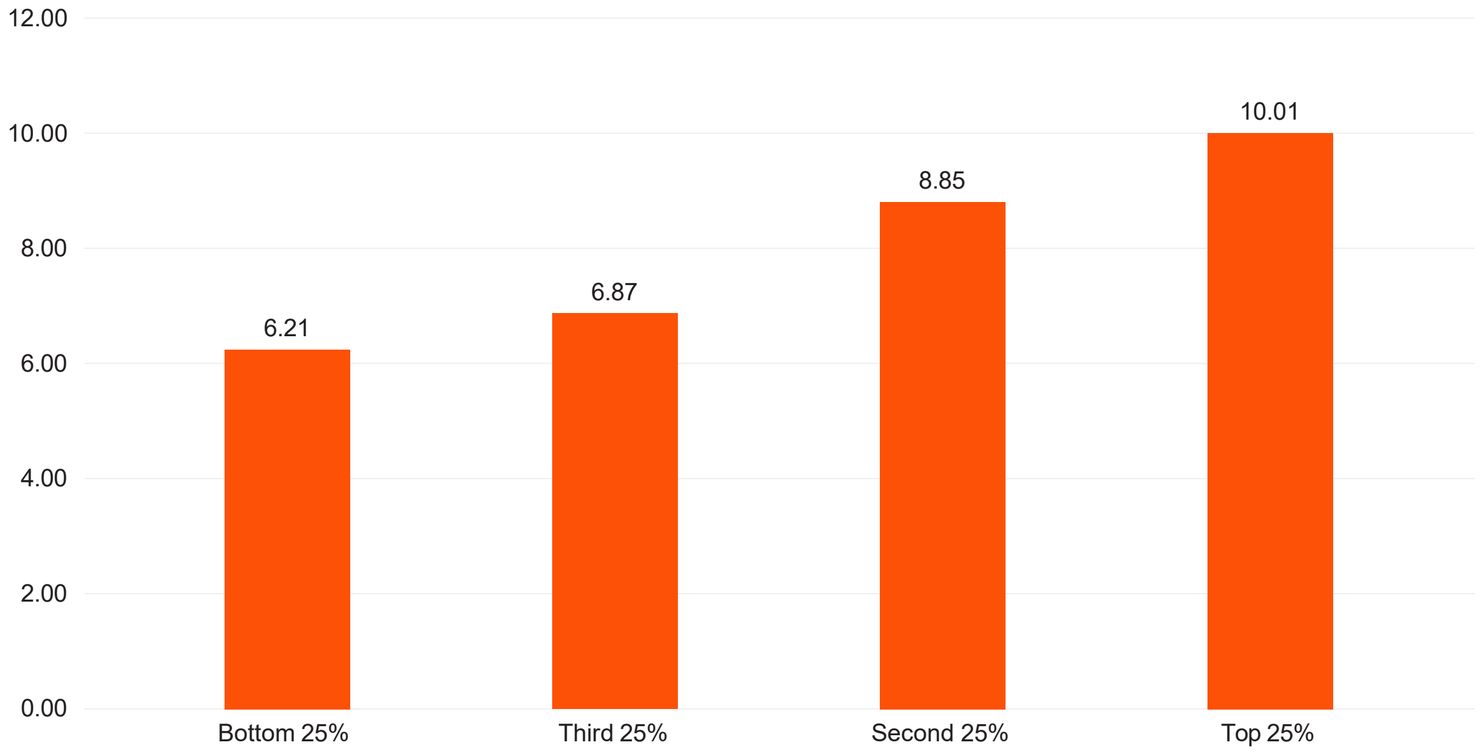
Source: PwC analysis, Lightcast data
Notes: 1. Chinese Mainland has a large informal labour market. Therefore, job postings data may only provide a partial representation of its labour market. 2. This analysis applies the Net Skills Change methodology developed by Deming and Noray (2020). For a full explanation of the methodology, see the 2026 Global AI Jobs Barometer, Appendix 1c.

Findings

- There is a positive correlation of 0.32 between AI exposure and net skills change between 2019 and 2025, indicating that more exposed occupations tend to see greater shifts in skill requirements.
- However, there is a wide dispersion of datapoints when comparing net skills change with AIOE, suggesting that while a broad relationship exists, occupation-specific factors likely play a more significant role.

This is evident across exposure quartiles, where the most AI-exposed occupations show the largest skill shifts

Average net skill change from 2019 to 2025 for 4-digit ISCO code occupations by AI occupation exposure quartile, Chinese Mainland



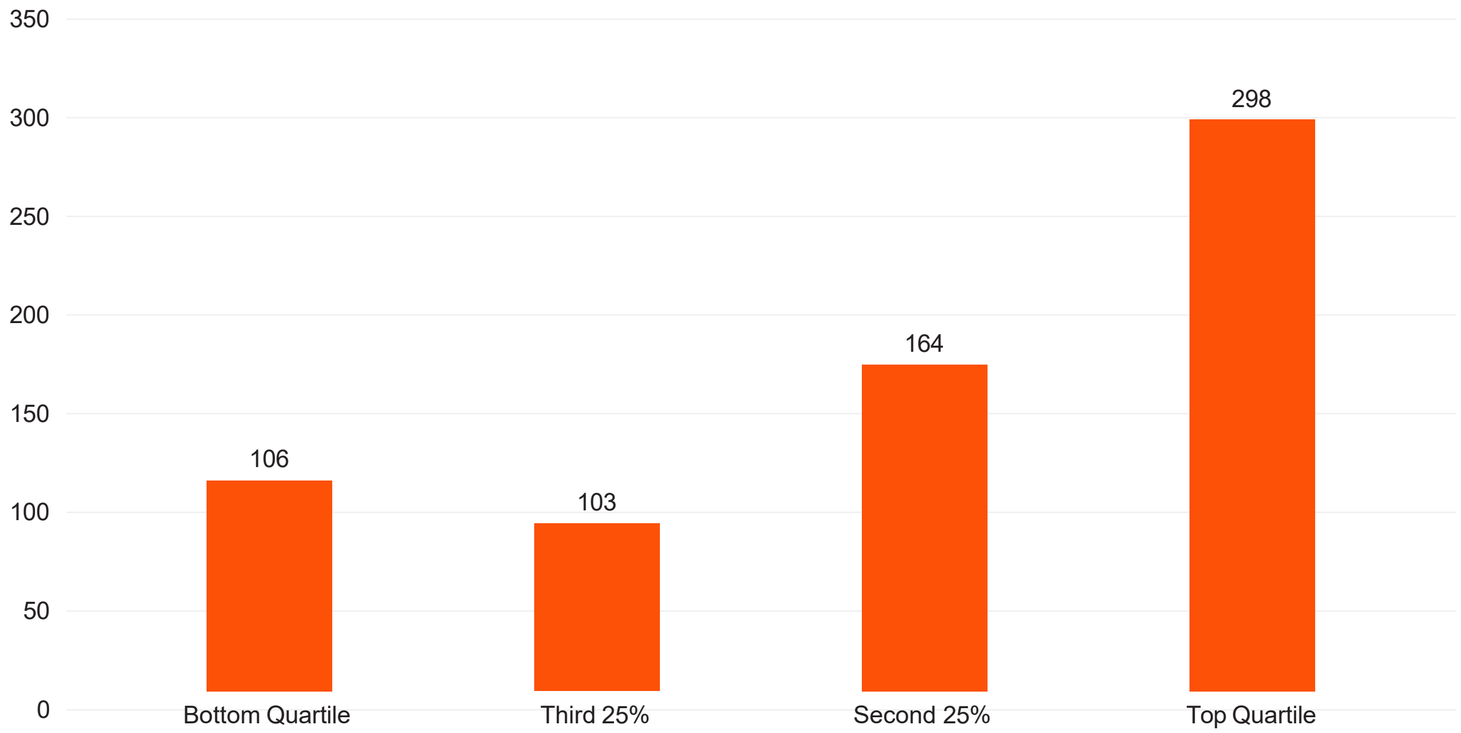
Source: PwC analysis, Lightcast data
Notes: Chinese Mainland has a large informal labour market. Therefore, job postings data may only provide a partial representation of its labour market.

Findings

- There is a clear gradient across exposure quartiles in Chinese Mainland, with occupations in the highest AI exposure group showing the largest average net skill shifts between 2019 and 2025.
- Lower exposure quartiles also show progressively higher average net skill change, reinforcing the overall positive relationship between AI exposure and skills transformation.
- This aligns with the earlier scatter plot, although the wider dispersion of occupations within each quartile suggests that occupation-specific factors still play an important role alongside AI exposure.

In line with this, the most AI-exposed occupations see greater expansion in the average number of new skills per occupation

Average number of “new” skills per occupation, by AI exposure quartile, Chinese Mainland, 2025 relative to 2019



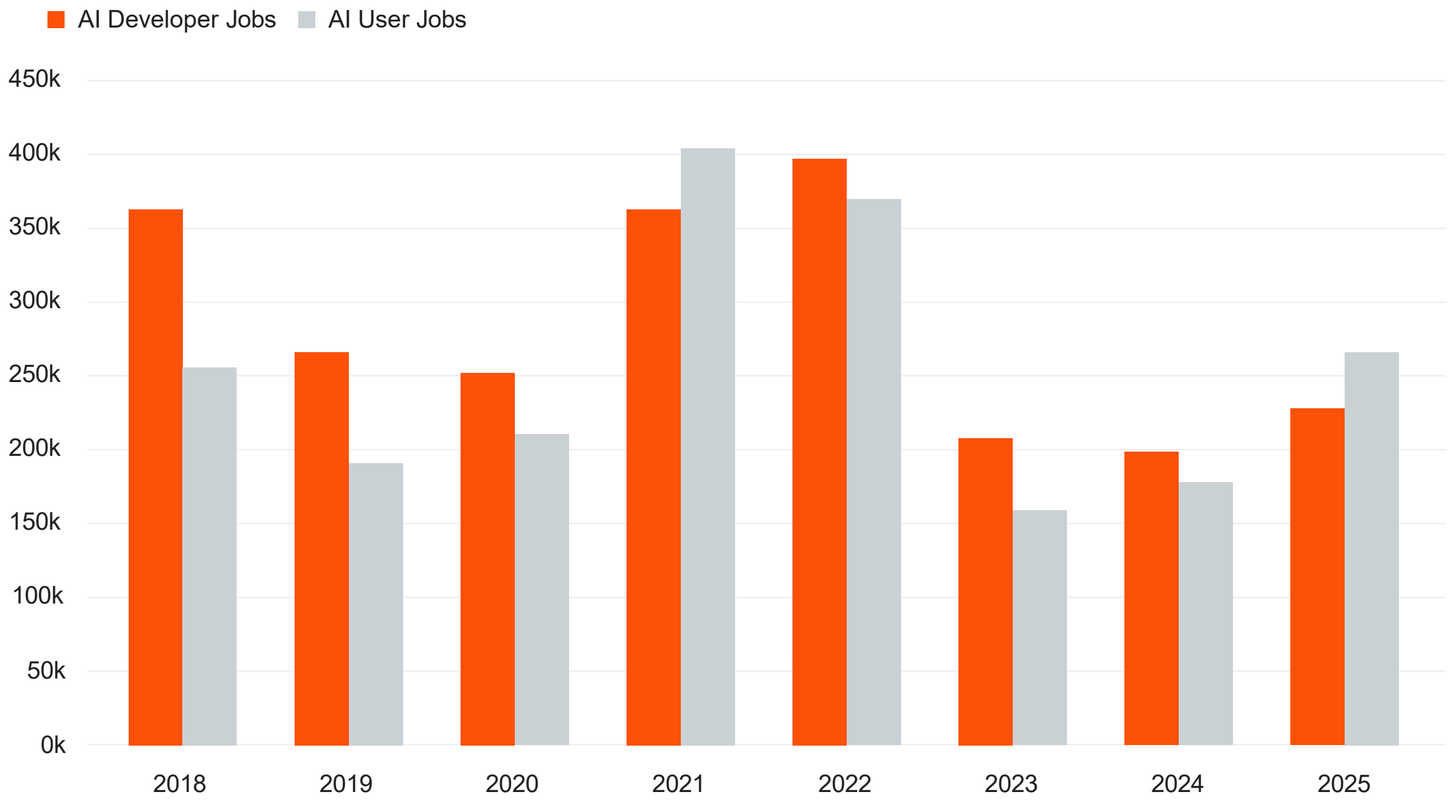
Source: PwC analysis, PwC AI Occupational Exposure Index, Lightcast data
Notes: : 1.We define a ‘new skill’ as any skill that has greater than 10 mentions in an occupation in 2025, but five or less mentions in that same occupation in 2019. Across all postings for an occupation in a given country, we count the number of ‘new skills’ required for that occupation. 2. Chinese Mainland has a large informal labour market. Therefore, job postings data may only provide a partial representation of its labour market.

Findings

- We find a clear positive relationship between AI exposure and the number of new skills required within occupations. Specifically, occupations in higher AI exposure quartiles exhibit a greater average number of newly emerging skills between 2019 and 2025.
- Importantly, this metric reflects the average number of new skills per occupation within each exposure quartile, rather than the total number of new skills observed.
- While the bottom and third quartiles show relatively modest differences, there is a more pronounced increase at higher exposure levels, with the top quartile averaging 298 new skills per occupation. This suggests that skill expansion accelerates as AI exposure increases.
- While some of this increase reflects higher posting volumes in more exposed occupations, this is consistent with underlying job growth and evolution, as expanding roles require a broader and more diverse set of skills.

AI job demand in Chinese Mainland is developer-led, with periodic surges in user roles

Total number of AI user and AI developer job roles, Chinese Mainland, 2018-2025



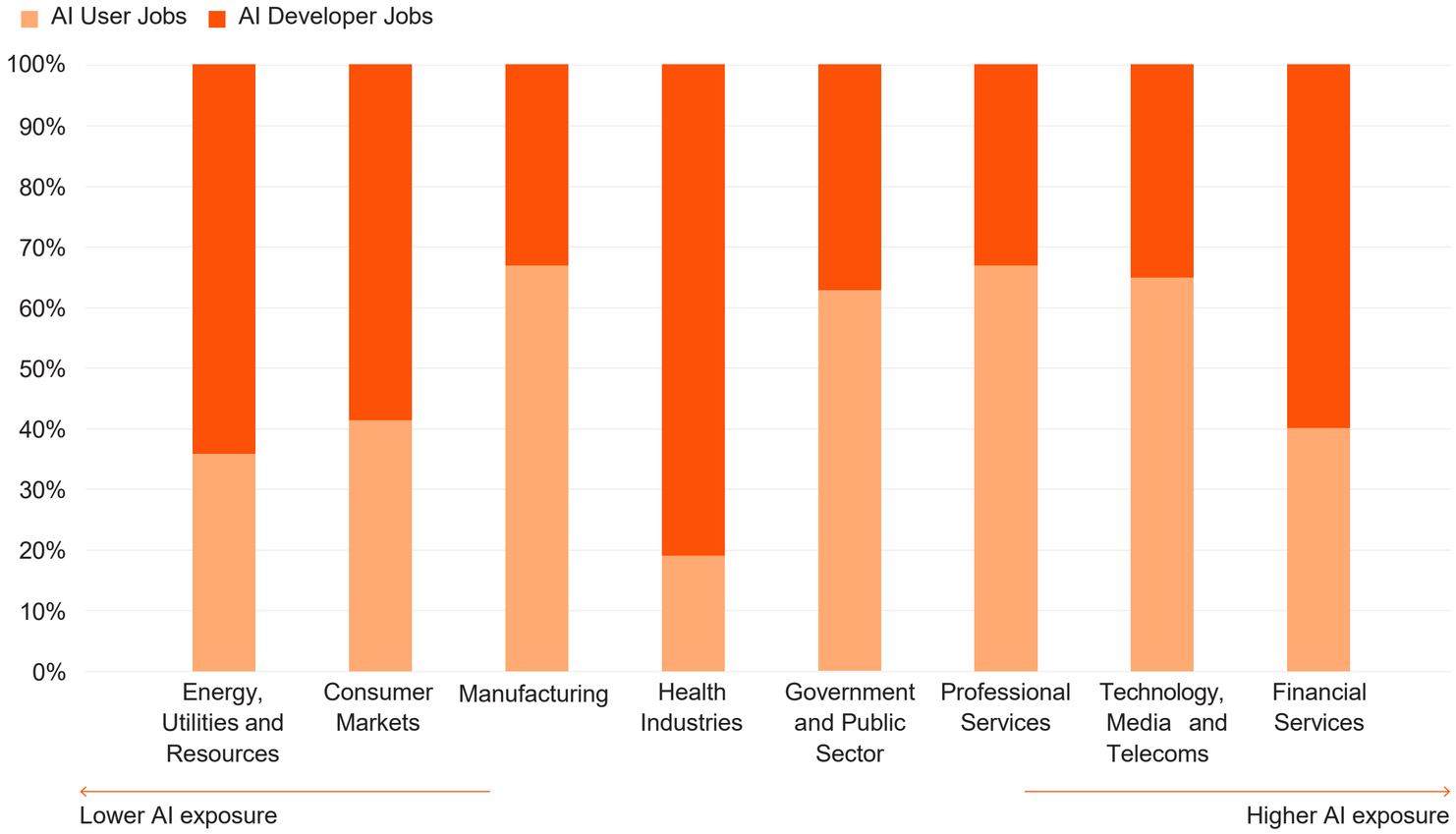
Source: PwC analysis, Lightcast data
Notes: 1. AI user and AI developer job roles are determined as jobs requiring Tier 0 or 1 skills (AI literacy and applied AI skills) for AI user jobs and Tier 2 skills (advanced AI skills) for AI developer jobs. AI developer jobs are tagged as such if there are any skills in the job postings data requiring Tier 2 skills for a specific job role. 2. Chinese Mainland has a large informal labour market. Therefore, job postings data may only provide a partial representation of its labour market.

Findings

- While AI user and AI developer roles are relatively similar in volume, developer roles edge ahead across most years, indicating a strong focus on technical capability alongside adoption.
- AI user roles overtook developer roles in 2021 and again in 2025, suggesting periods of accelerated AI adoption and deployment following earlier investment in technical capacity.
- Both categories rebounded in 2025, with AI user roles rising by just under **90k** and developer roles by around **30.5k.** AI user roles increased by **50.8%** and AI developer roles by **15.5%.**
- Overall, the trend reflects a structurally developer-led market, punctuated by phases where demand shifts toward user roles as AI capabilities are operationalised at scale. This also aligns with the broader market trend: most Chinese companies are continuously upskilling their business teams on the practical application and scaling of AI tools.

Across sectors, AI job postings in Chinese Mainland vary between demand for AI user and developer capabilities

Within sector shares of AI user and AI developer job roles of all AI related roles, Chinese Mainland, 2025



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Findings

- AI developer roles account for a high share across several sectors, with several sectors show higher demand for development capabilities. **Health Industries** records the highest share of developer roles **(81%)**, followed by **Energy, Utilities and Resources** at **64.3%.**
- While AI user roles are most prominent in **Professional Services** and **Manufacturing (66.8%),** these sectors still retain a significant share of developer roles, indicating a more balanced demand.
- Overall, the pattern suggests that AI adoption in Chinese Mainland is closely coupled with in-house development, with many sectors investing heavily in building technical capabilities alongside deployment, with many sectors maintaining strong demand for technical development alongside deployment. This is largely driven by Chinese Mainland's stronger corporate demand for in-house development by compliance and self-controllability requirements

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