The Fearless Future: 2025 Global AI Jobs Barometer

Germany Analysis

Global Insights

The AI Jobs Barometer reveals AI's global impact on jobs, wages, skills, and productivity by examining close to a billion job ads from six continents.

Our data suggests:

The AI revolution is accelerating in all industries including industries less obviously exposed to AI such as agriculture and construction.

AI is redefining job roles faster and faster. Skills sought by employers for AI-exposed jobs are changing 66% faster than for other jobs – up from 25% last year.

AI is associated with gentler growth – but not sharp declines - in job numbers. Like electricity, AI has the potential to create more jobs than it displaces if it is used to pioneer new forms of economic activity. Our data suggests that companies are indeed using AI to help people create more value rather than simply reduce headcount.

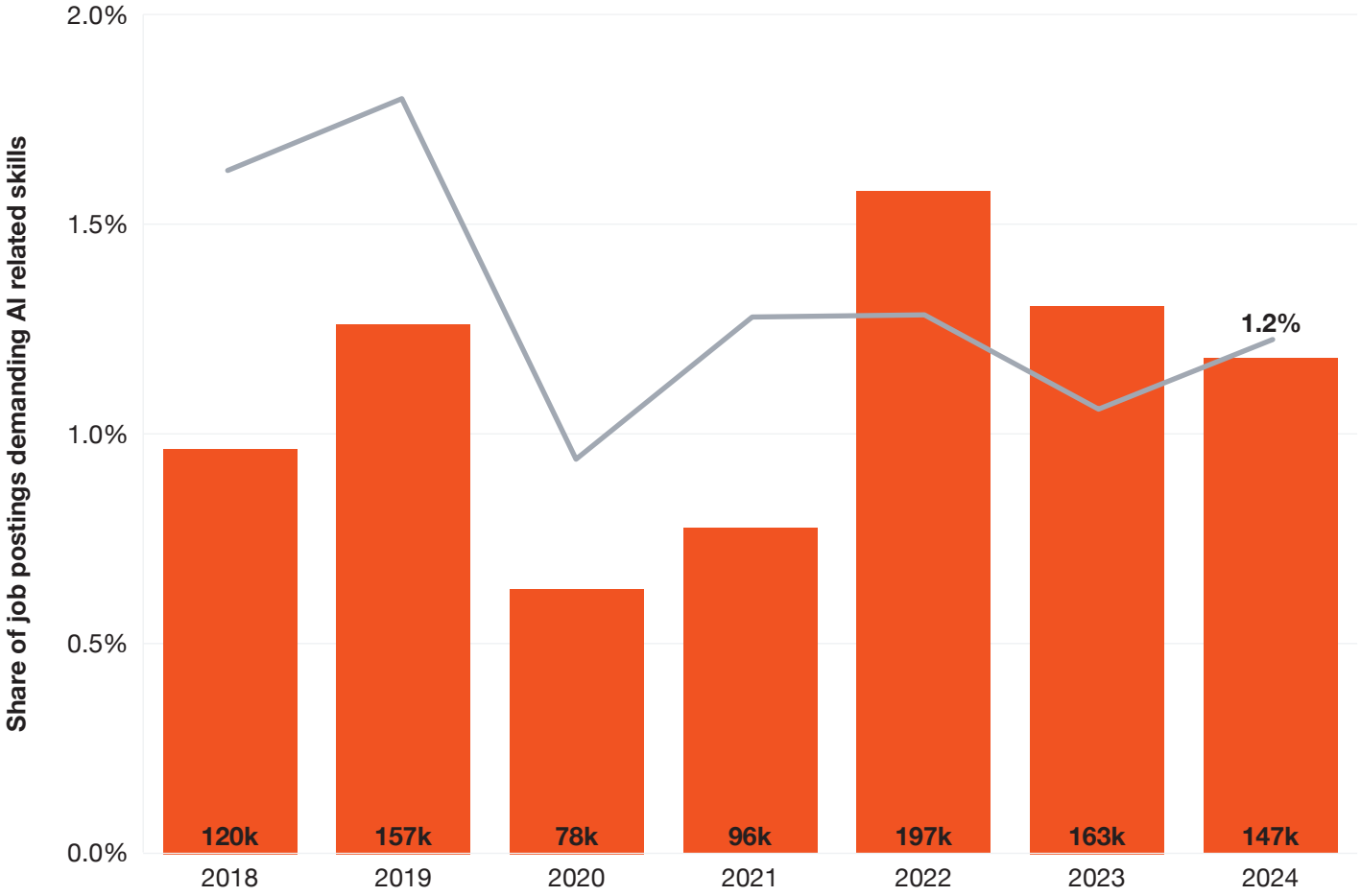
AI is helping to democratise opportunity for people who lack the time or resources to obtain formal degrees. Employer demand for formal degrees is declining particularly quickly for jobs exposed to AI, especially jobs more highly automated by AI.

Please see the global findings report for more insights.

Germany Insights

Germany's demand for AI jobs has been highly volatile, with fluctuations in both job postings share and absolute numbers.

Total number and share of job postings requiring AI related skills, Germany, 2018-2024



Sources: PwC analysis, Lightcast data

Key findings

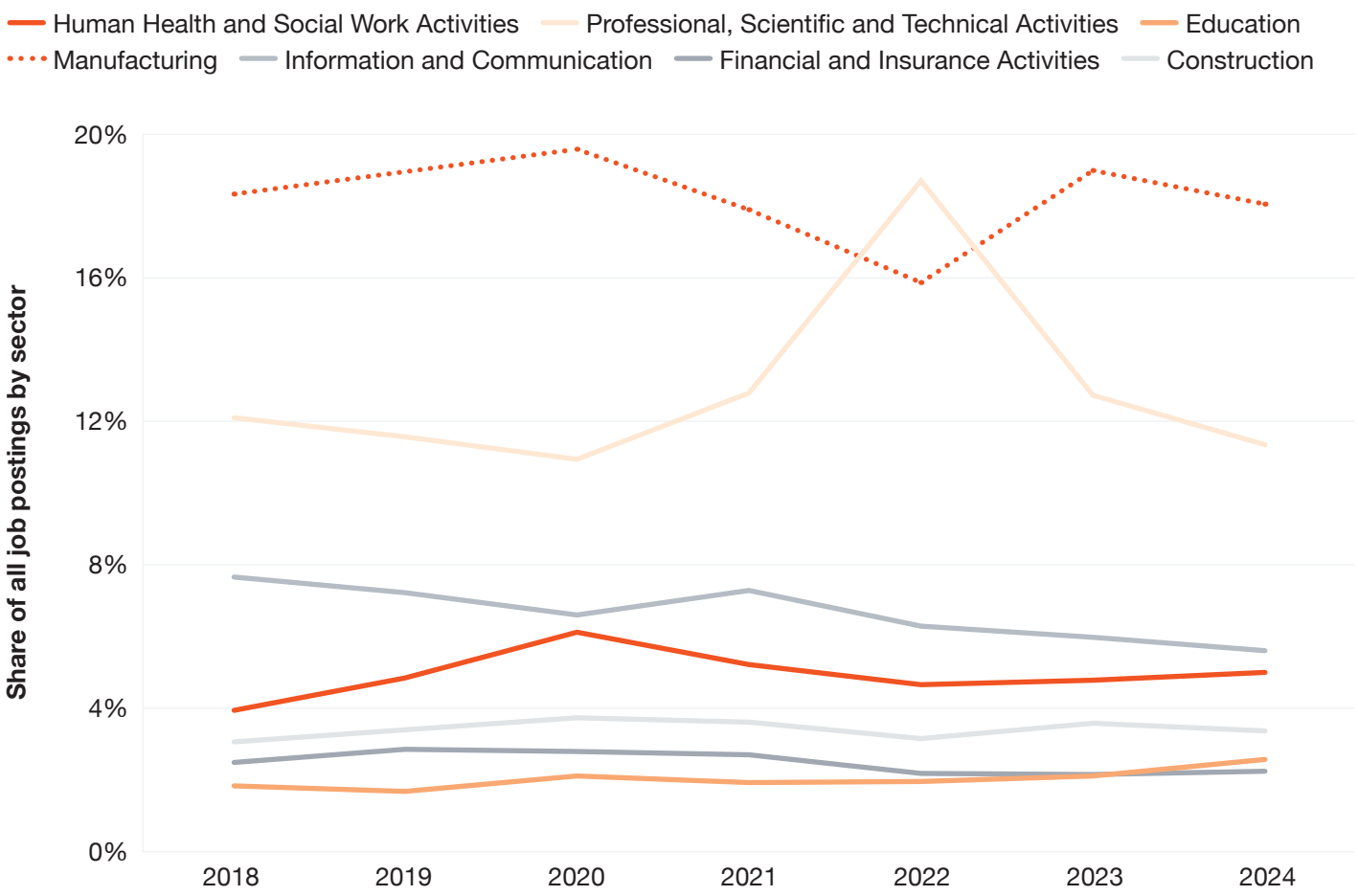
- **Fluctuating AI Job Demand:** AI-related job postings peaked at 197k in 2022, followed by a decline to 147k in 2024, indicating volatility in demand.
- **AI Job Market Share Remains Relatively Stable:** The share of job postings demanding AI skills reached 1.2% in 2024, showing slight fluctuations but no dramatic changes.

Notes

- We use Lightcast data for jobs postings, including associated skills.

Manufacturing and professional sectors lead job demand in Germany, while other industries stay consistently below the 8% job posting share

Share of all job postings by sector, Germany, 2018-2024



Sources: PwC analysis, Lightcast data

Key findings

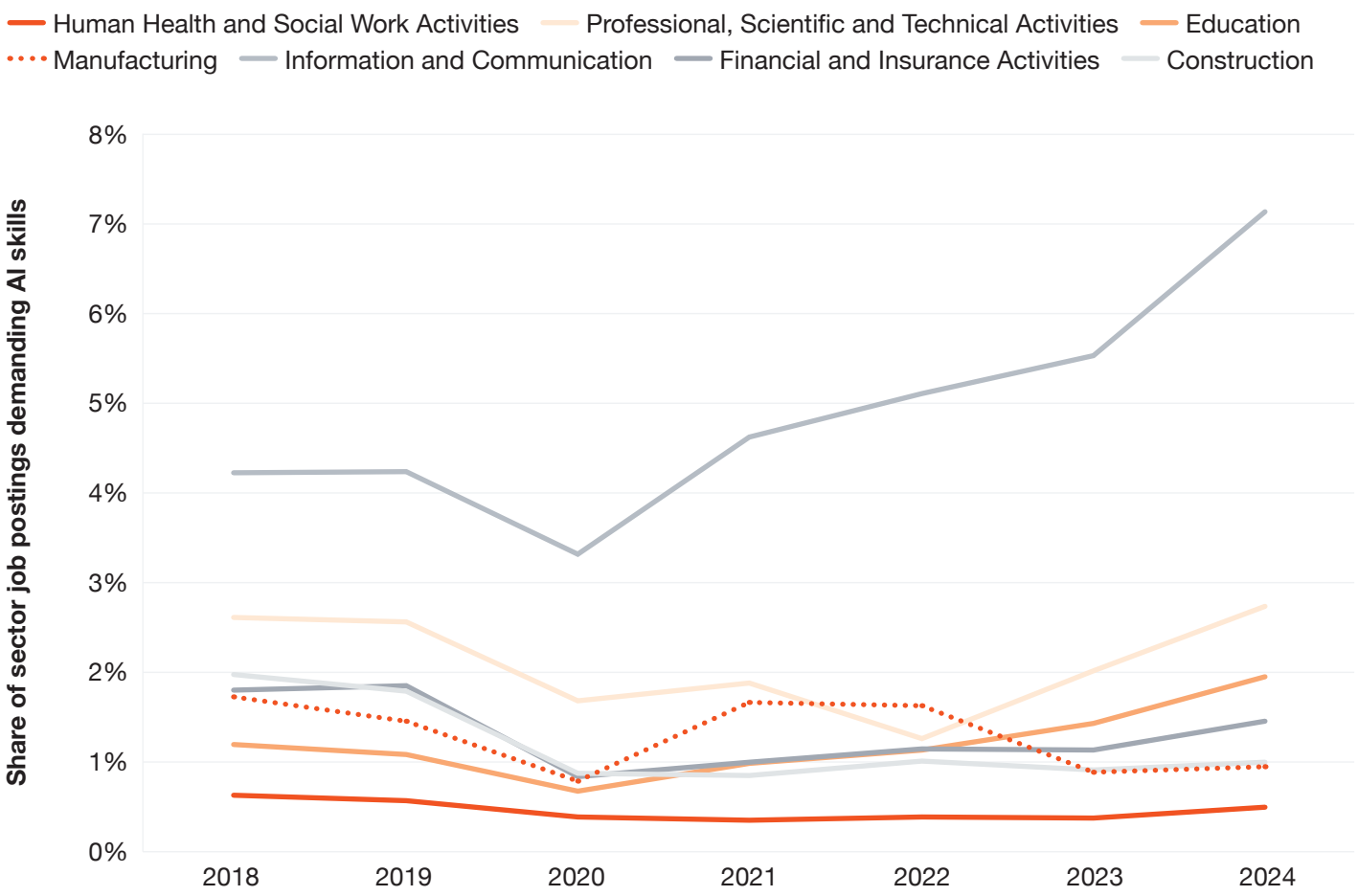
- Manufacturing (18.1% in 2024) maintained the highest share of job postings apart from a slight decline after 2022.
- Professional, Scientific, and Technical Activities (11.3% in 2024) experienced a sharp spike in 2022, followed by a decline back to pre-2021 levels by 2024.

Notes

- The number of uncategorised jobs changes over time, causing shifts in the shares of other sectors in our data.

The Information and Communication sector dominates AI job demand in Germany, far outpacing all other industries.

Share of AI job postings by sector, Germany, 2018-2024



Sources: PwC analysis, Lightcast data

Key findings

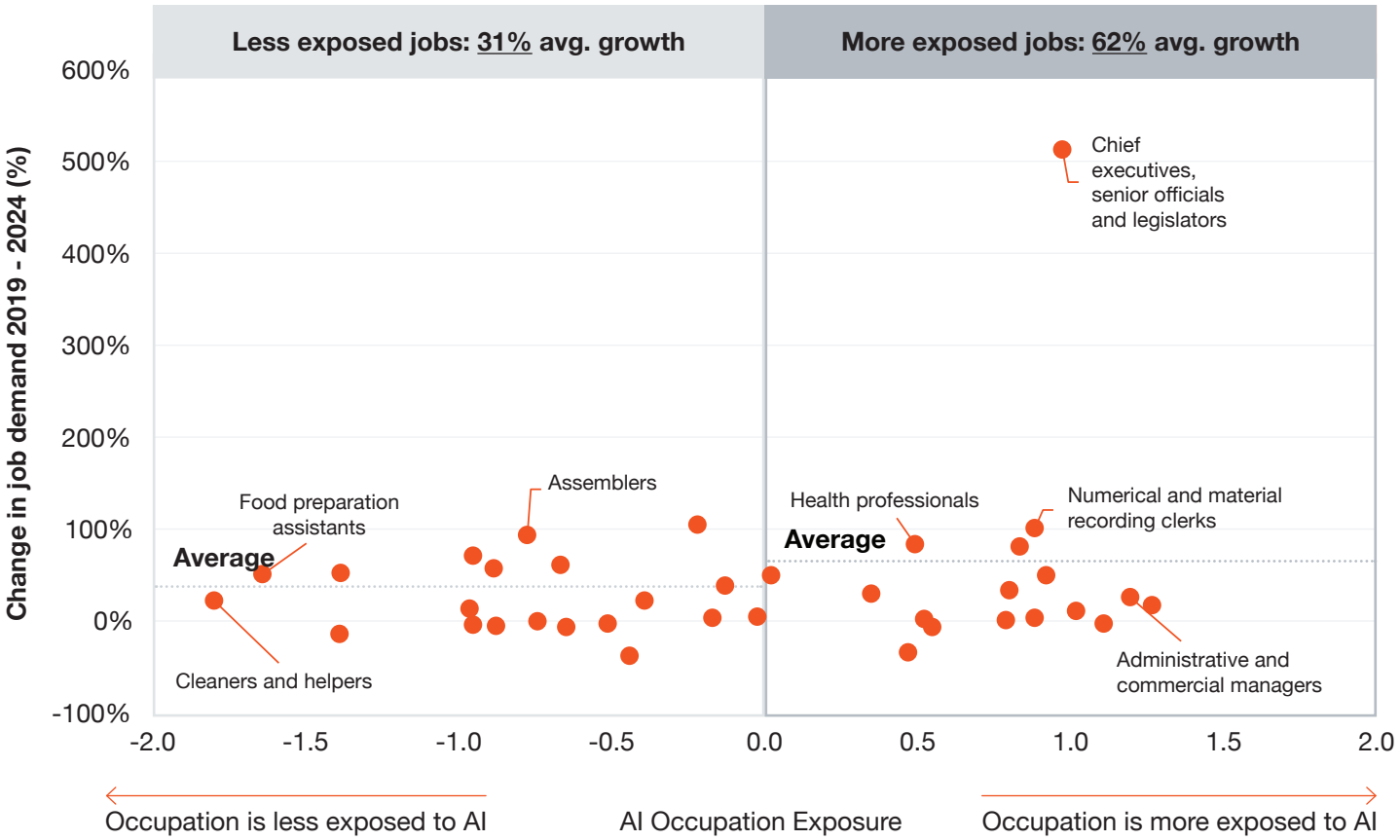
- The Information and Communication sector has experienced steady and strong growth, surpassing 7% in 2024, making it the leading industry for AI job postings.
- Professional, Scientific, and Technical Activities saw a decline around 2020, after which it rebounded sharply, showing a strong upward trend from 2022 onwards, peaking at 2.7% in 2024.
- Other sectors have shown a consistent increase in AI job postings, reflecting broader AI integration.

Notes

- We use Lightcast data for jobs postings, including associated skills and sectors

Job numbers in AI-exposed occupations have grown 62% since 2019 - including growth in virtually every type of occupation

Cumulative growth rate in all job postings against exposure to AI, Germany, 2019-2024



Sources: PwC analysis, Lightcast data

Key findings

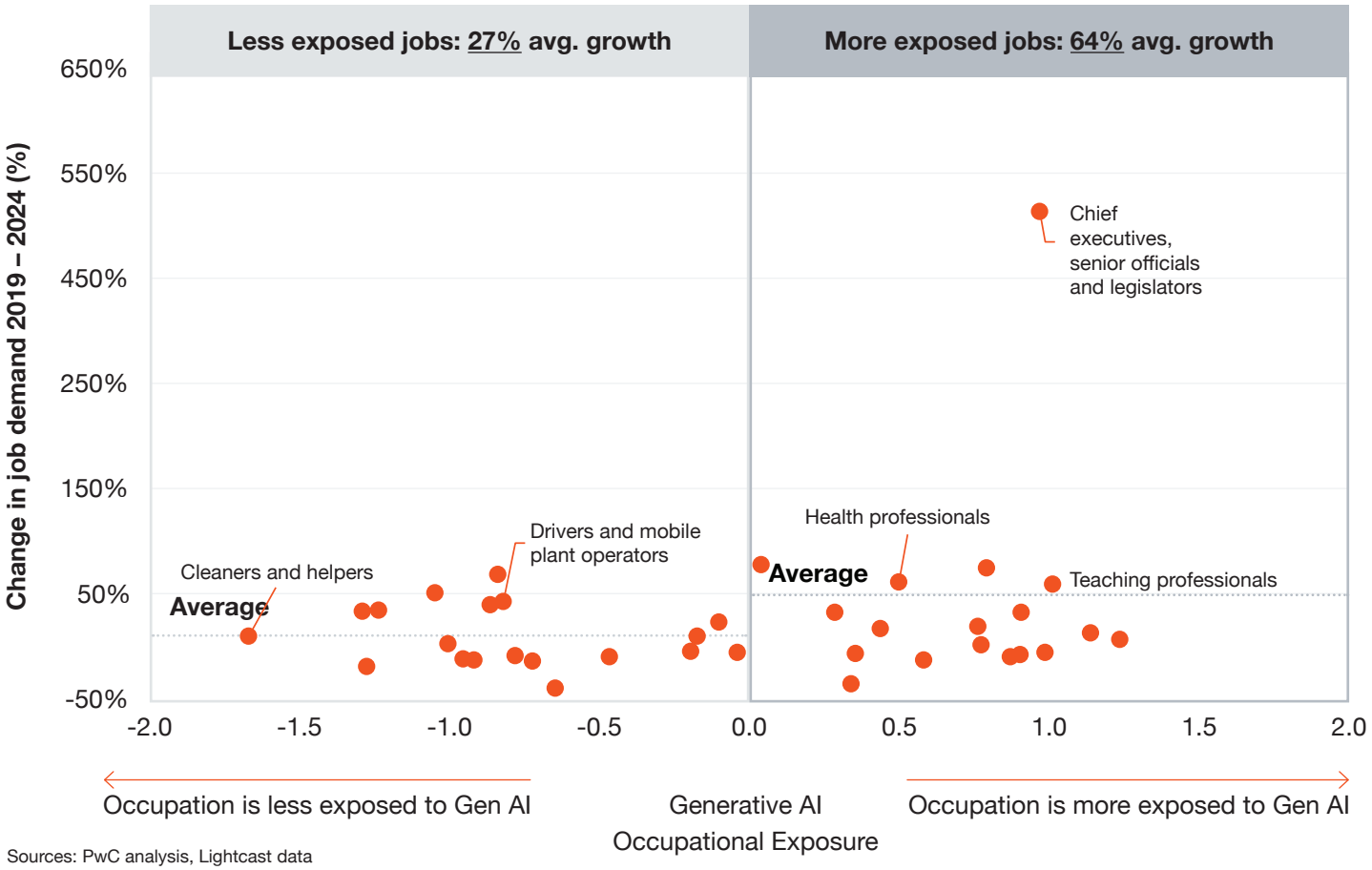
- The correlation coefficient (0.18) indicates a weak positive relationship between AI occupation exposure and growth in job postings. This suggests that higher AI exposure is slightly associated with increased job posting growth, but the effect is minimal.
- Both low and high AI-exposure occupations show a wide range of job posting growth rates, reinforcing that AI exposure alone does not fully explain labour demand trends.

Notes

- This metric uses ISCO codes at the 2-digit level, whereas the remainder of our analysis uses the 4-digit level
- We remove all errors and observations with zeros to filter the data

Job numbers in GenAI exposed occupations have grown 64% since 2019 - including growth in virtually every type of occupation

Cumulative growth rate in all job postings against the projected exposure to Generative AI, Germany, 2019-2024



Sources: PwC analysis, Lightcast data

Key findings

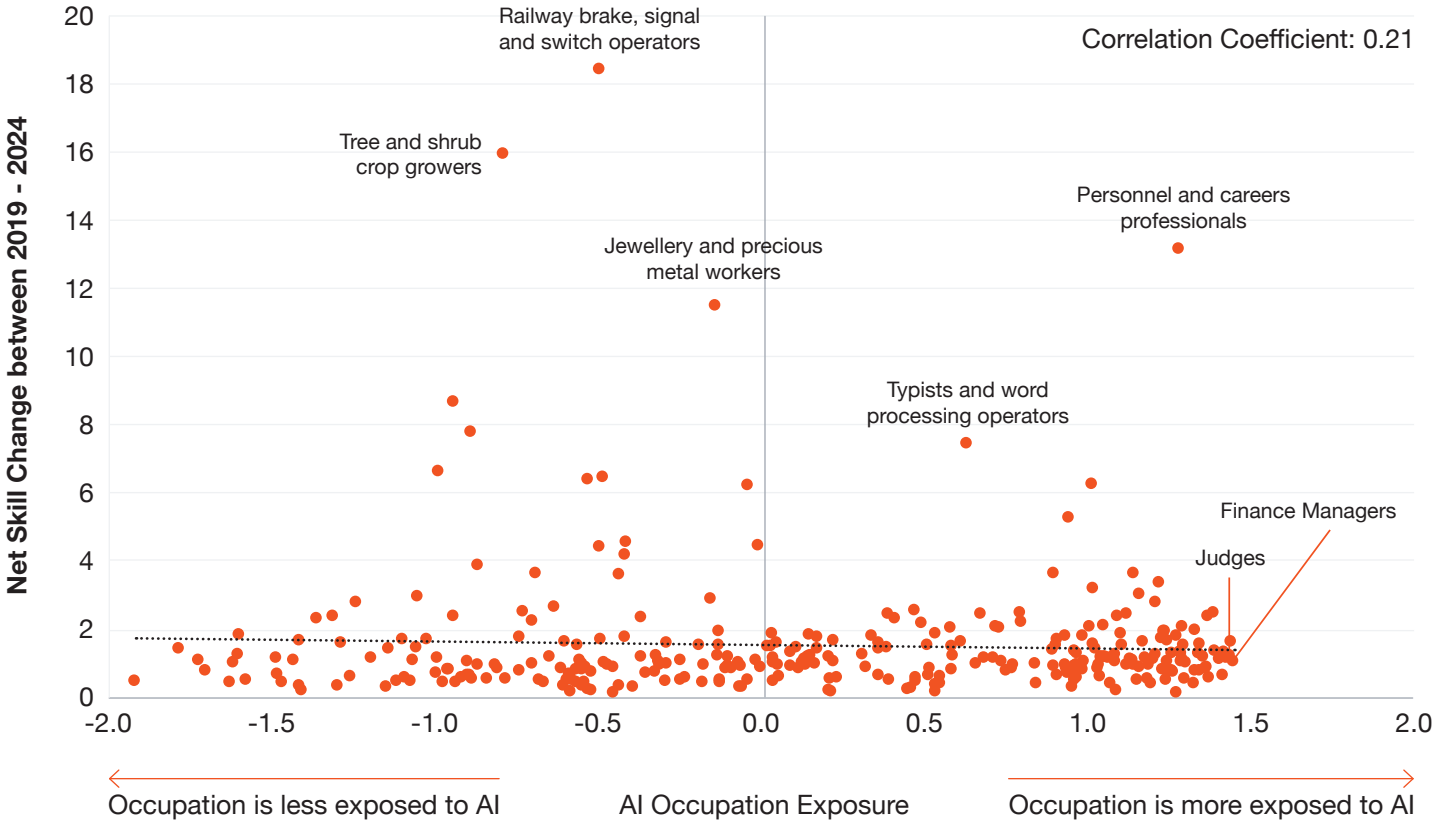
- The correlation coefficient (0.2) suggests a weak positive relationship between Generative AI occupation exposure and growth in job postings. This means occupations more exposed to Generative AI have seen slightly higher job posting growth, but the effect is small.
- Both low and high Generative AI-exposed occupations display a mix of growth rates, indicating AI exposure is not the sole driver of demand shifts.

Notes

- This metric uses ISCO codes at the 2-digit level, whereas elsewhere uses the 4-digit level.
- We remove all errors and remove all observations with zeros to filter the data.

Top quartile of AI-exposed jobs experience 36% higher net skill change (3.9 vs. 2.9), reflecting greater adaptation to evolving role demands

Net change in the number of skills demanded against AI exposure, Germany, 2019-2024



Sources: PwC analysis, Lightcast data

Key findings

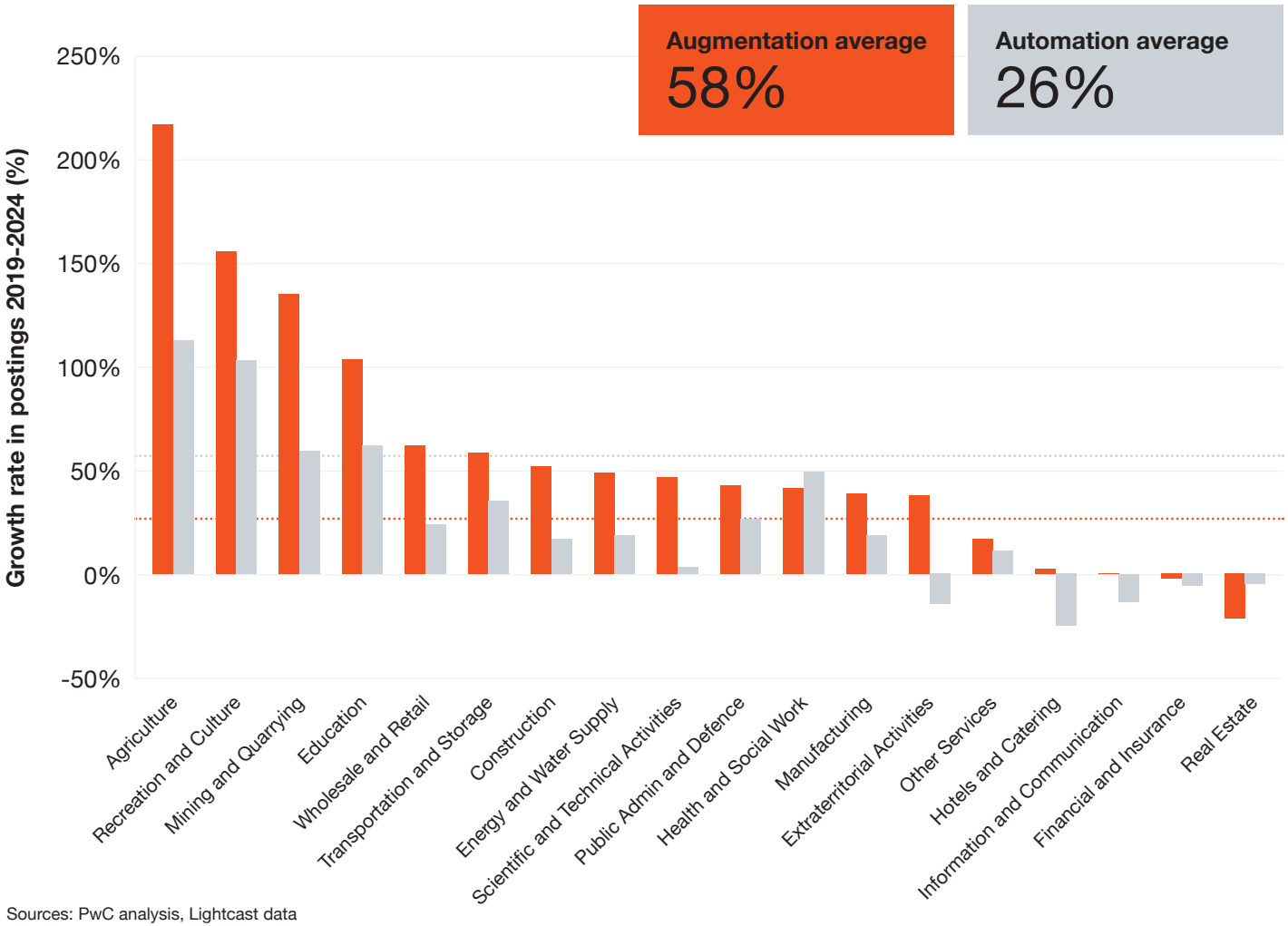
- The correlation coefficient of 0.21 suggests a weak positive relationship between AI occupation exposure and net skill change. This indicates that jobs more exposed to AI tend to experience slightly greater skill changes.
- Jobs in the top quartile of AI exposure have an average net skill change of 3.9, compared to 2.9 for the bottom quartile (least exposed). This represents a 36% higher net skill change in AI-exposed occupations, indicating greater adaptation and evolving skill demands in these roles.

Notes

- We remove all errors and remove all observations with zeros to filter the data.
- Net skill change is measured as the change in frequency of skills required in the job posting
- Most exposed and least exposed are defined as the top and bottom quartiles

AI job growth is strongest in Agriculture, Recreation, and Mining, while Finance, Tech, and Real Estate show stagnation or decline

Growth rate in postings by sector for augmented and automated jobs, Germany, 2019-2024



Sources: PwC analysis, Lightcast data

Key findings

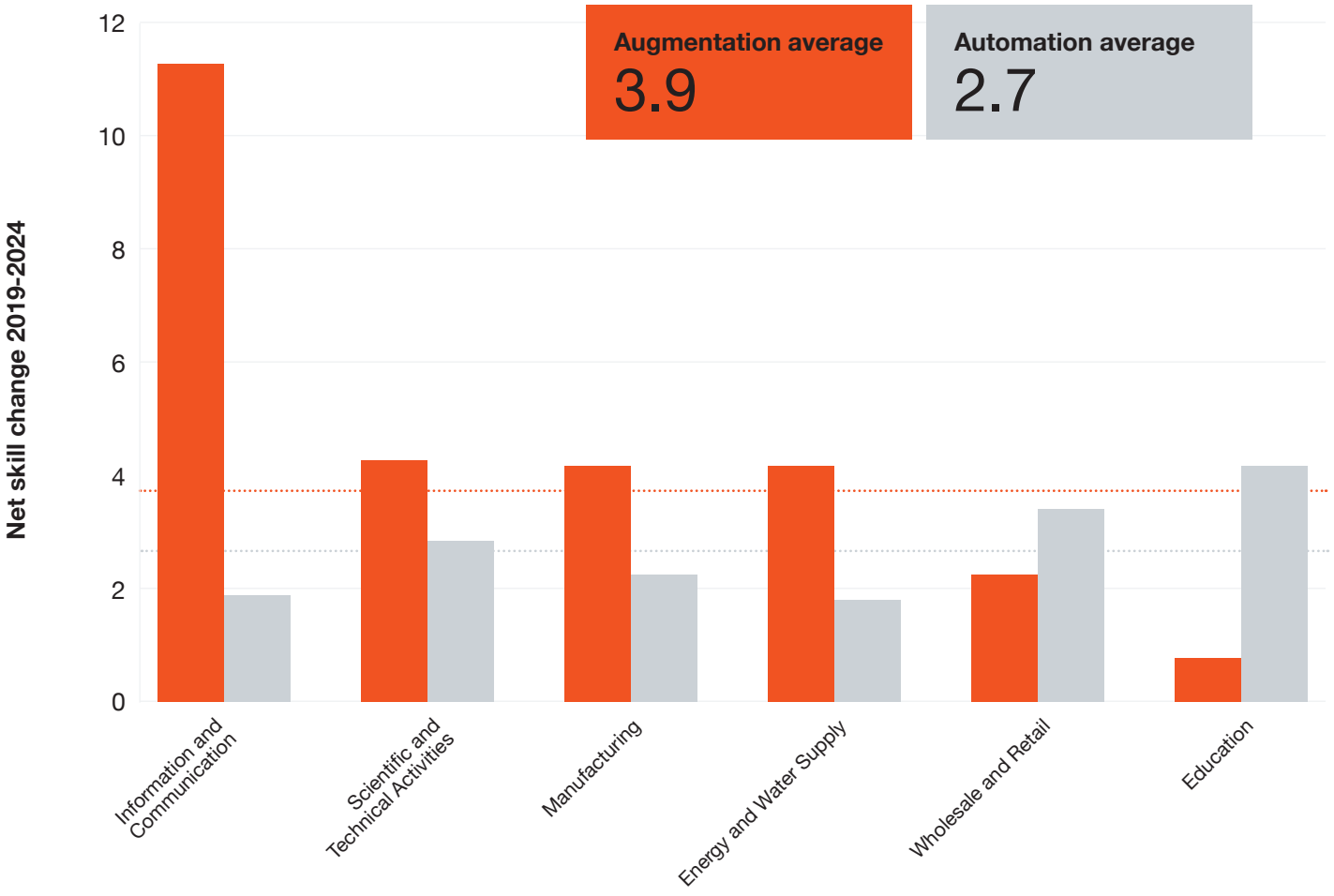
- Agriculture leads AI-driven job growth, with augmentation exceeding 200% and automation above 100%, far surpassing the national averages (58% for augmentation, 26% for automation).
- Recreation & Culture, Mining & Quarrying, and Education also show high growth in augmentation and automation rates above national averages, reflecting increased AI integration in creative industries, resource extraction, and digital learning.
- Information & Communication, Financial & Insurance, and Real Estate show negative or near-zero growth, indicating a decline or stagnation in AI-driven job postings in these industries.

Notes

- After filtering, observations are categorised by Augmented, Automated, or Neither. We remove observations labelled as Neither.
- We remove the sector labelled Unknown from the graph.

Germany's AI-driven skill growth is highest in Information and Communication, while other jobs remain less dynamic

Net skill change for automated and augmented jobs by sector, Germany, 2019-2024



Sources: PwC analysis, Lightcast data

Key findings

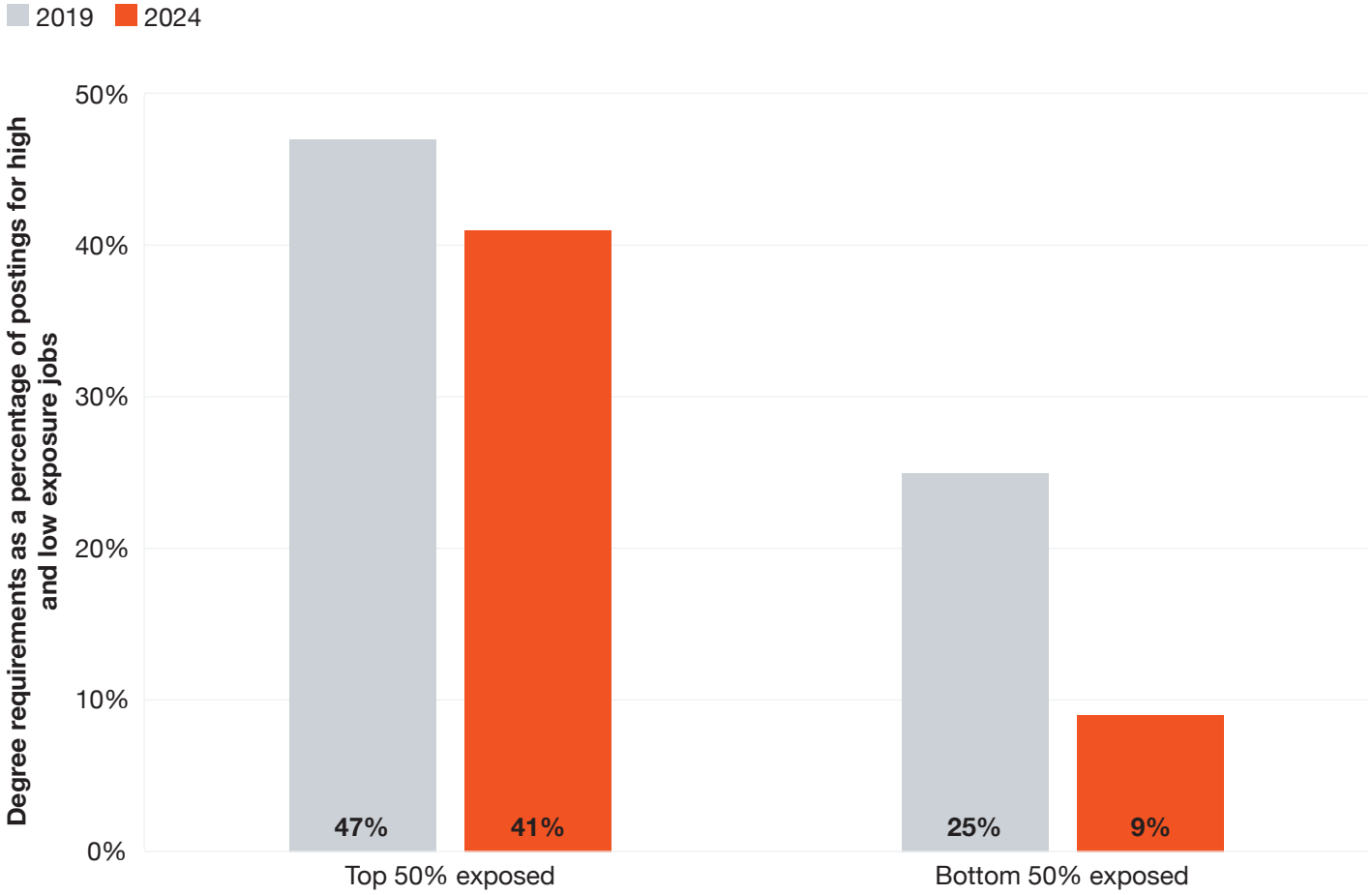
- Information & Communication leads AI-driven skill change, with augmentation at 11.3, indicating strong AI integration in the tech sector.
- Education shows particularly low skills change for Augmentation exposed jobs, indicating that AI has low penetration within education jobs.

Notes

- After filtering, observations are categorised by Augmented, Automated, or Neither. We remove observations labelled as Neither.
- We remove sectors with fewer than 50 AI job postings and with the AI:non-AI job posting ratio of less than 0.05% from the graph.

In Germany, while degree requirements remain higher for the top 50% most exposed jobs the proportion has fallen across the board

Degree requirements for jobs with high and low AI exposure, Germany, 2019-2024



Sources: PwC analysis, Lightcast data

Key findings

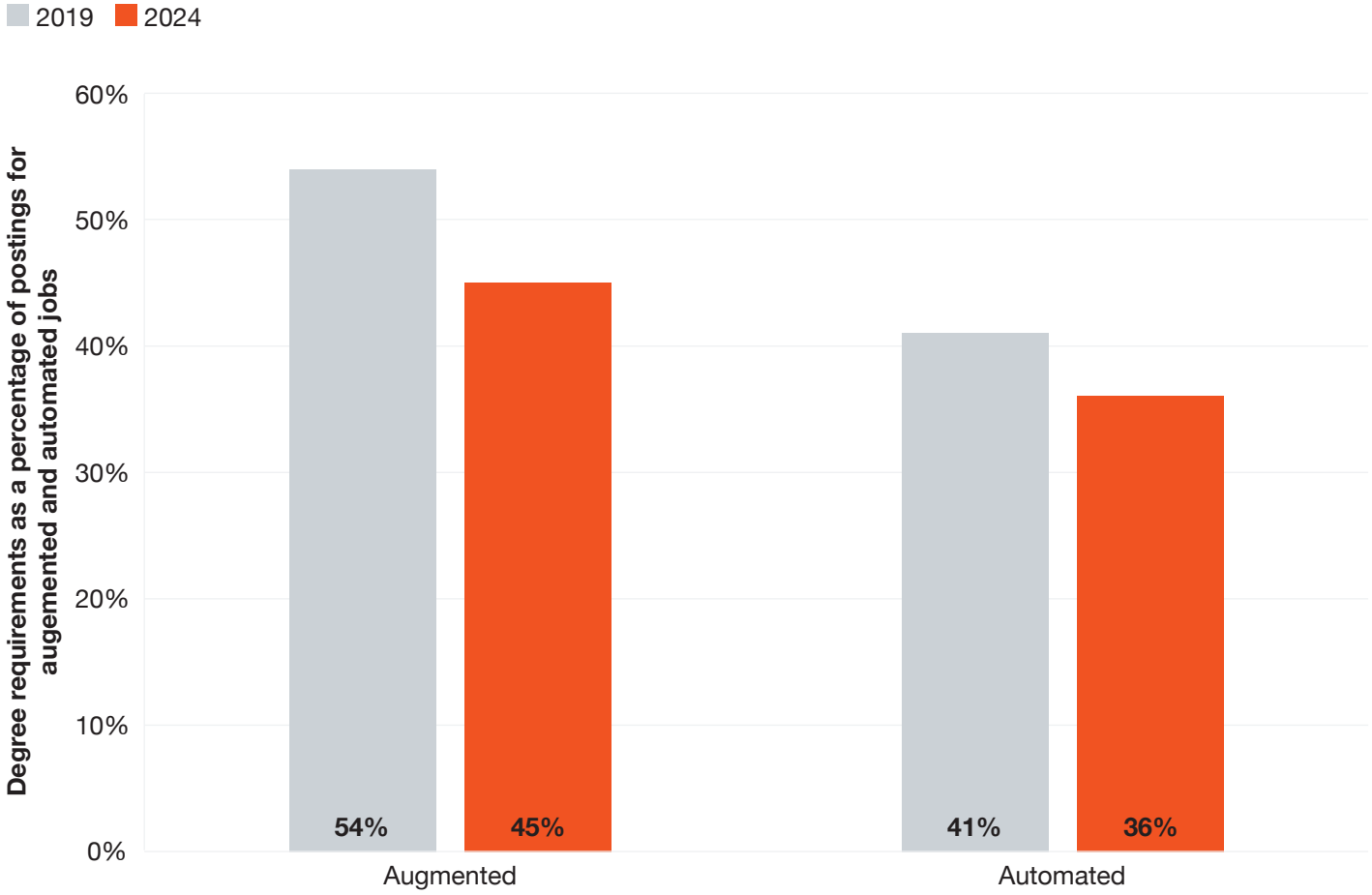
- Jobs with high AI exposure in Germany have seen declining degree requirements, falling by 6pp from 47% in 2019 to 41% in 2024.
- Jobs with lower AI exposure have seen a dramatic fall in degree requirements, dropping by 16pp from 25% in 2019 to 9% in 2024.
- The gap between high and low AI-exposure jobs has fallen however jobs in the top half of exposure still require a degree just under 4 times as often.

Notes

- Job postings are only classified as degree jobs if it is explicitly listed in the posting
- High exposure (top 50% exposed) is defined as jobs in the top half by AIOE

Degree requirements in Germany have fallen for both augmented and automated roles

Degree requirements for jobs more exposed to Augmentation and Automation, Germany, 2019-2024



Sources: PwC analysis, Lightcast data

Key findings

- Jobs exposed to augmentation have seen falling degree requirements between 2019 and 2024, falling from 54% of postings to 45%
- Similarly, jobs exposed to automation now require degrees less often (36%) than they did in 2019 (41%)
- The majority of augmented and automated jobs in Germany no longer list degree requirements, indicating skill based hiring is increasingly becoming the norm among these roles

Notes

- After filtering, observations are categorised by Augmented, Automated, or Neither. We remove observations labelled as Neither.
- Job postings are only classified as degree jobs if it is explicitly listed in the posting

Due to data limitations these metrics are not presented for Germany

Unavailable metrics:

- Number of jobs postings relative to 2012 split by quartile AI exposure is unavailable due to data not being available from 2012

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