



Two Futures for Jobs in an AI era

2026 Global AI Jobs Barometer

Japan Analysis



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.

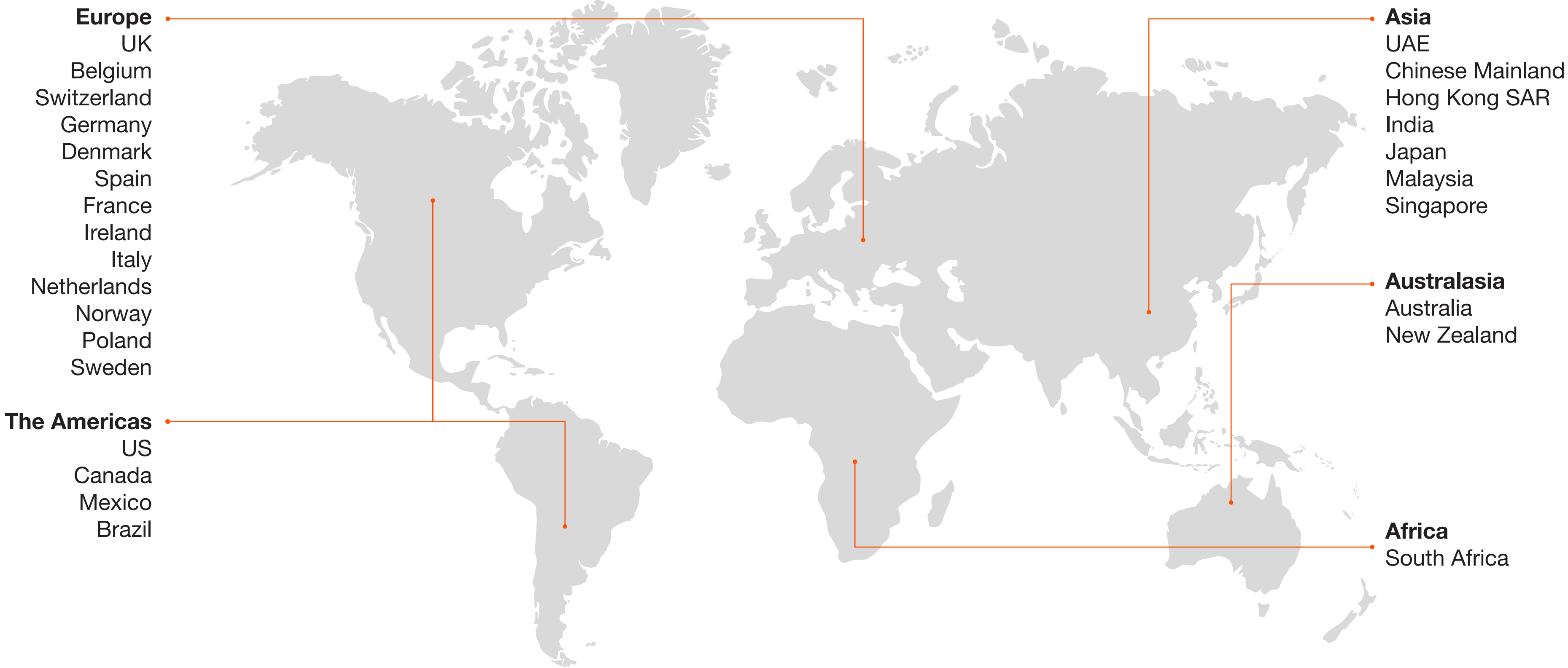
35%

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.

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

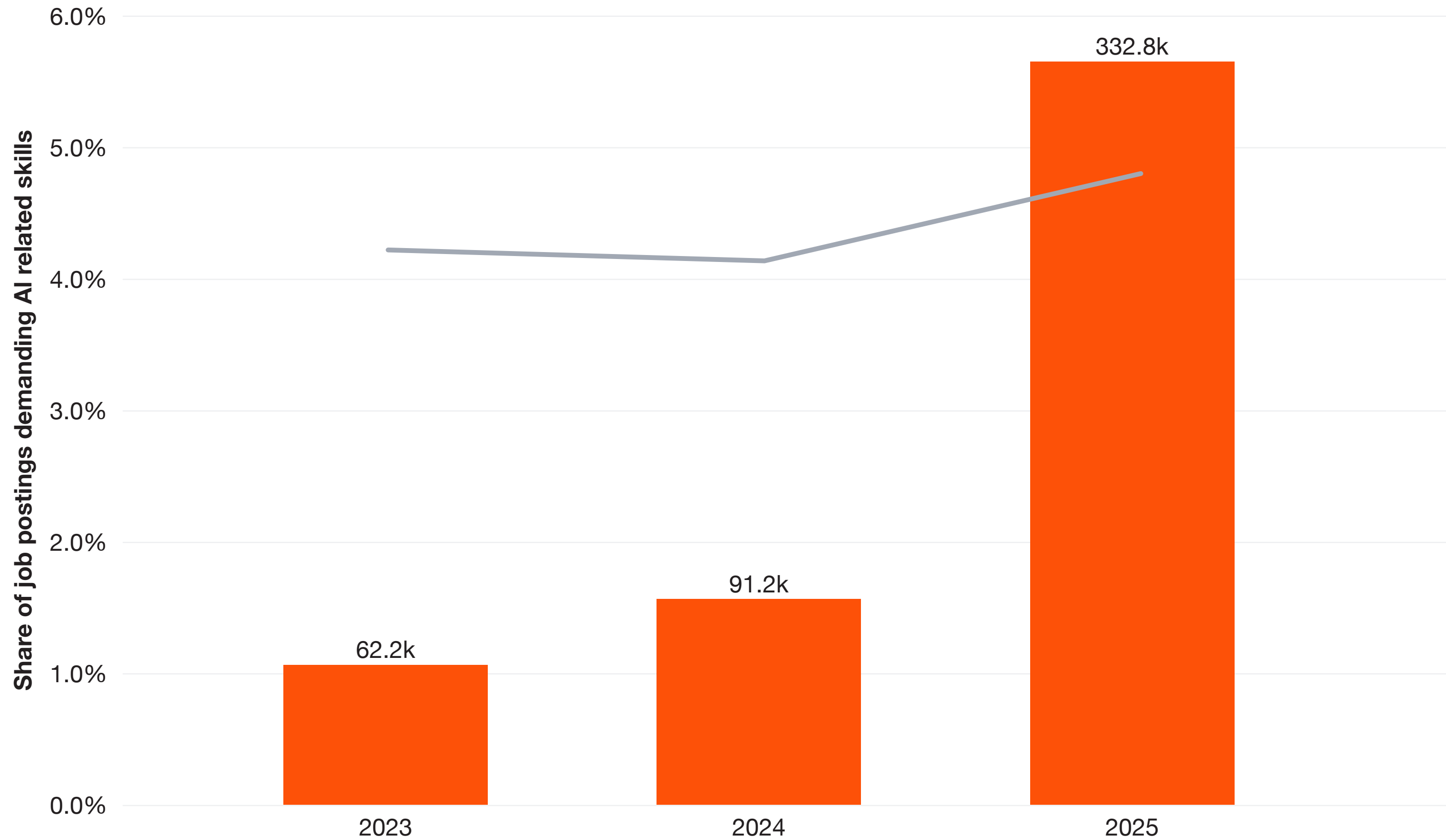


Japan Insights



AI hiring in Japan has more than tripled in 2025 relative to 2024, indicating increased AI adoption in the workforce

Total number and share of job postings requiring AI related skills, Japan, 2023-2025



Source: PwC analysis, Lightcast data

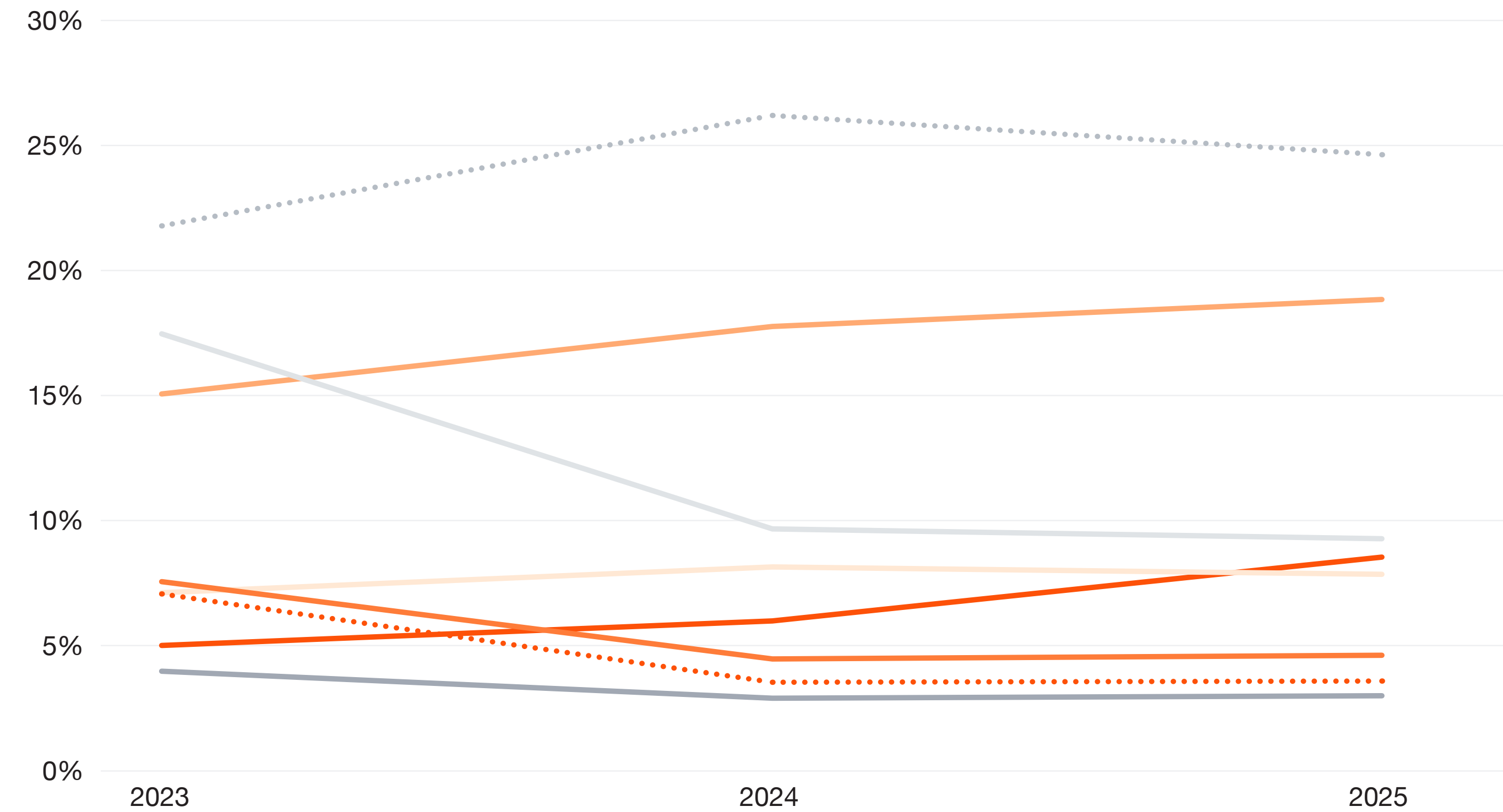
Findings

- The number of job postings in Japan requiring AI skills increased by around 242k in 2025.
- As a result, the share of job postings requiring AI skills increased from 4.2% in 2024 to 4.8% in 2025.

Energy and Manufacturing account for the largest shares of hiring in the Japanese labour market

Share of all job postings by sector, Japan, 2023-2025

— Health Industries
 — Consumer Markets
 — Manufacturing
 ⋯ Professional Services
 ⋯ Energy, Utilities and Resources
 — Financial Services
 — Technology, Media and Telecoms
 — Government and Public Sector



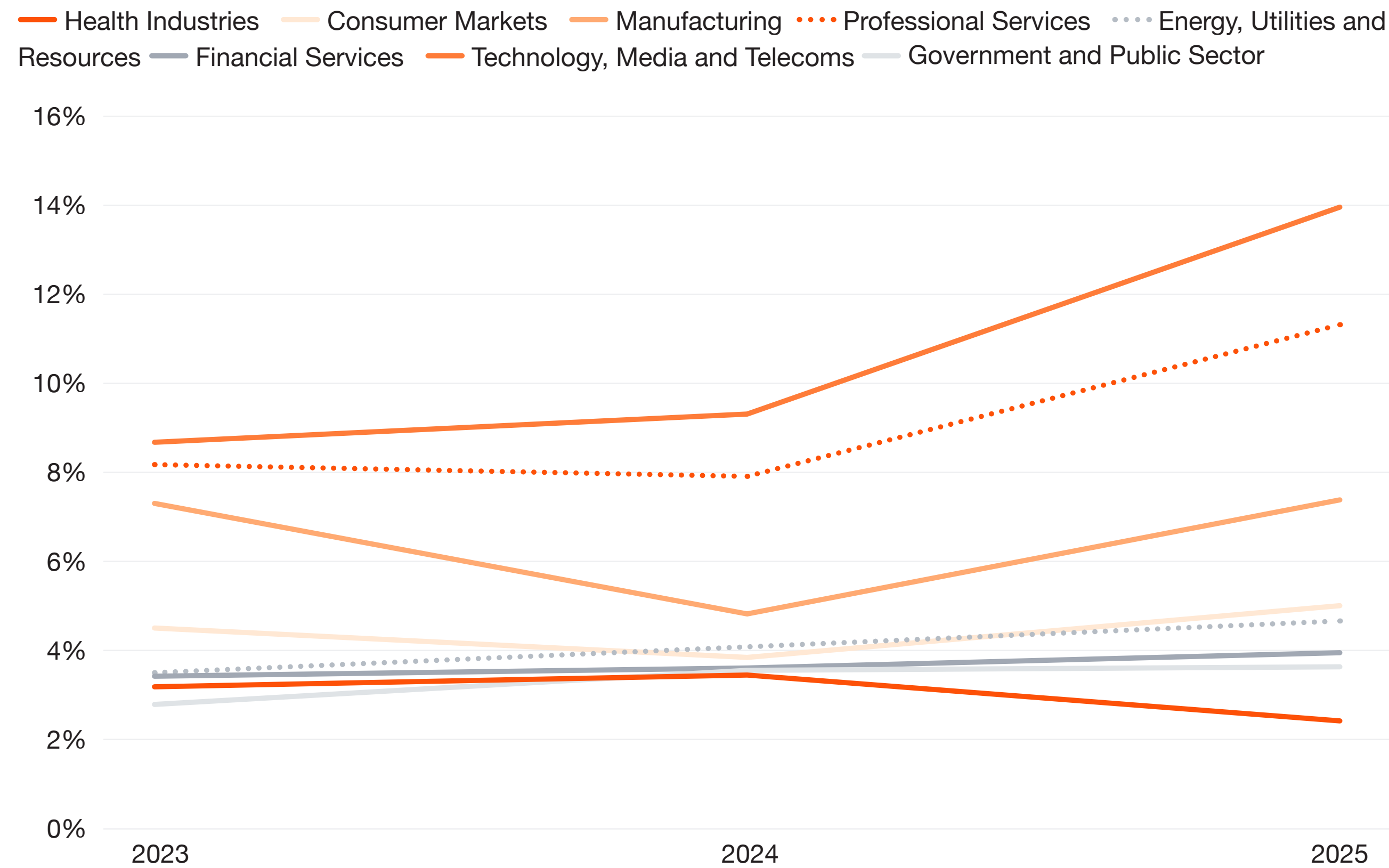
Source: PwC analysis, Lightcast data

Findings

- Energy, Utilities and Resources and Manufacturing stand out as the largest sources of labour demand, accounting for 24.8% and 18.9% of total Japanese job postings respectively.
- Professional Services and Financial Services record the smallest shares, at 3.5% and 3% respectively, but still account for a substantial share of the Japanese labour market.

AI hiring intensity is rising across most sectors in Japan and is led by TMT

Share of AI job postings within each sector, Japan, 2023-2025



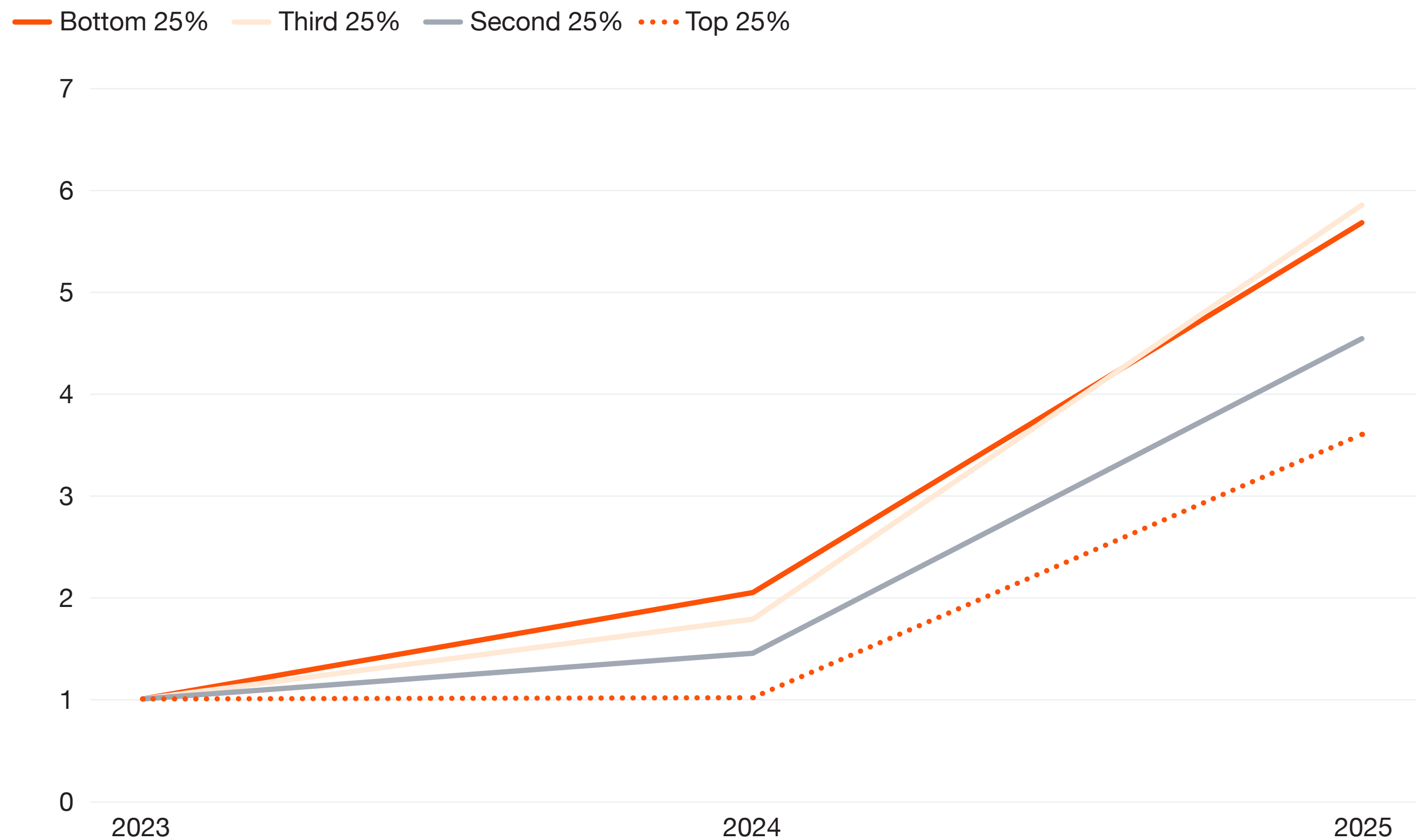
Source: PwC analysis, Lightcast data

Findings

- Technology, Media and Telecoms (TMT) records the highest share of AI job postings in Japan, consistent with its role as the most digitally intensive sector.
- Most sectors saw an increase in AI job share in 2025 compared to 2024, apart from Health which saw a decline of ~1 p.p. and Financial Services and Government and Public Sector which remained at similar levels.

Since 2023, job postings in Japan have increased more strongly in less AI-exposed occupations

Number of job postings relative to 2023 by AI exposure quartile, Japan, 2023-2025



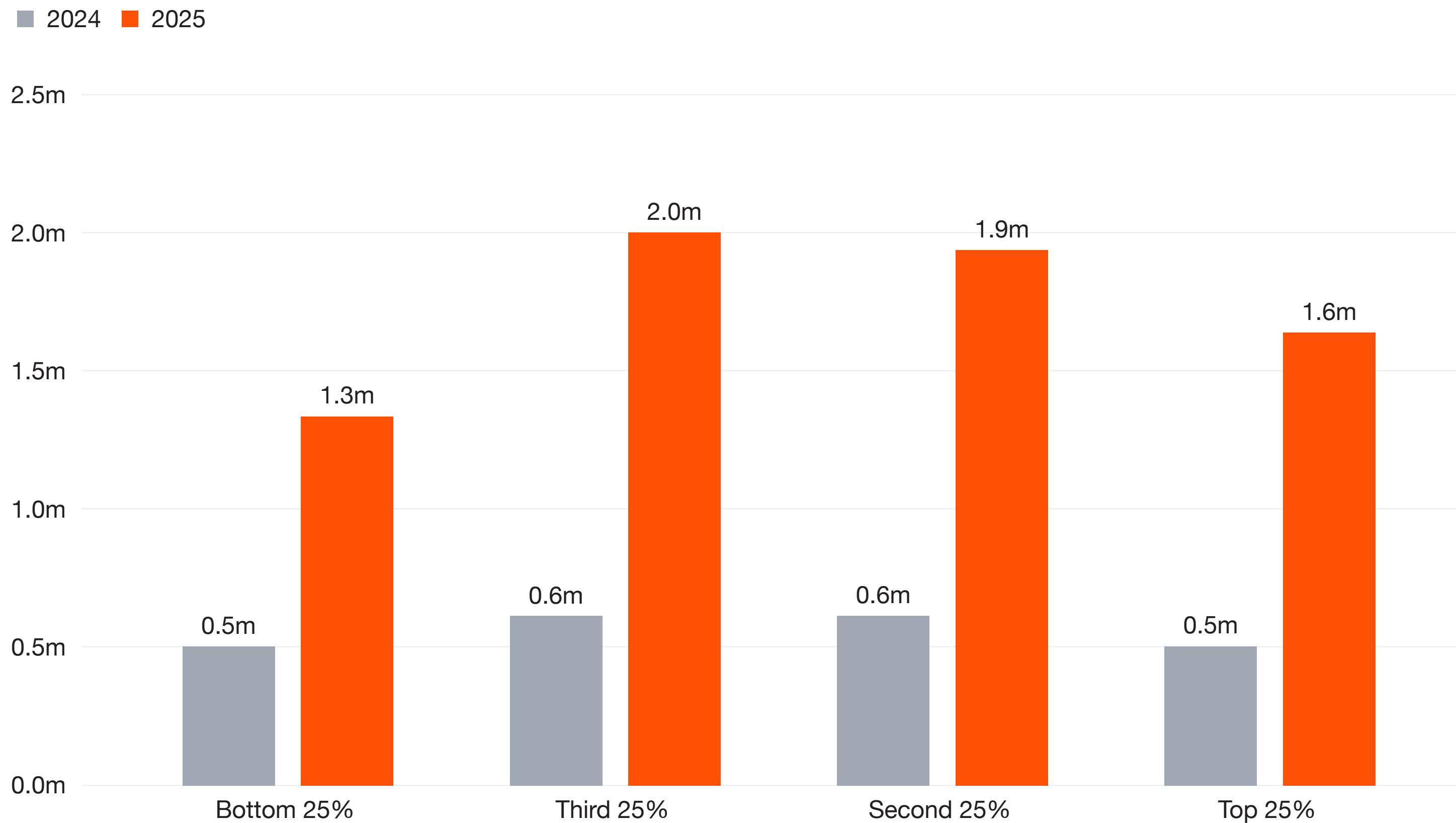
Source: PwC analysis, Lightcast data.

Findings

- Job postings have increased across all AI exposure quartiles in Japan, with stronger growth in less AI-exposed occupations. By 2025, the lowest exposure quartile has around 5.7 postings for every posting in 2023, compared to 3.6 in the highest exposure quartile.
- Growth in job postings across all quartiles has picked up since 2024.

In Japan, job postings are broadly evenly distributed across AI exposure quartiles

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



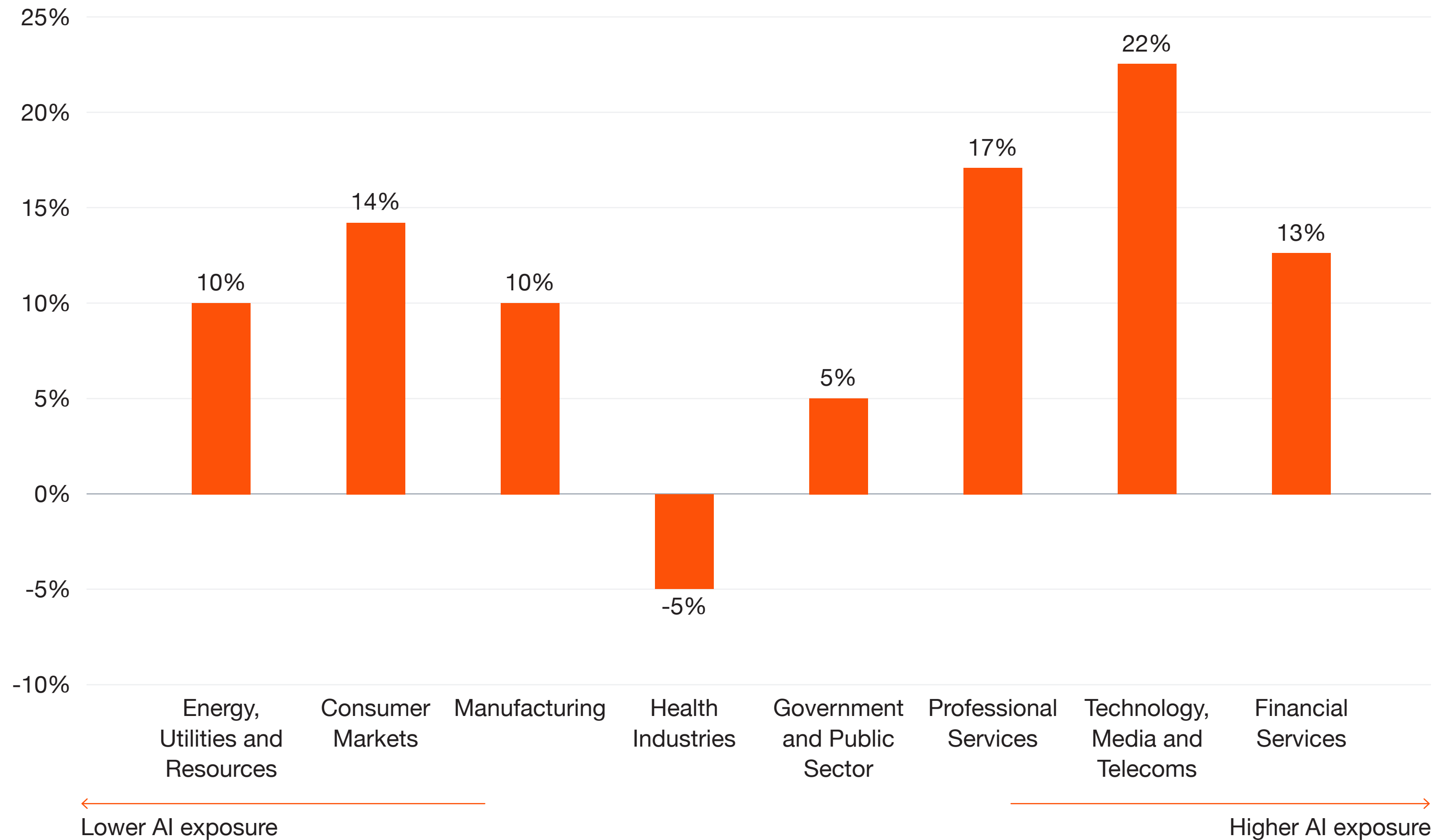
Source: PwC analysis, Lightcast data

Findings

- Job postings are relatively evenly distributed across AI exposure quartiles in Japan, with no single group accounting for a markedly larger share.
- All quartiles saw strong growth in postings between 2024 and 2025, indicating a broad-based increase in hiring demand.

AI wage premiums form a U-shaped curve across sectors, with higher premiums observed in both lower and higher AI exposure industries

Wage premium by sector, Japan, 2025



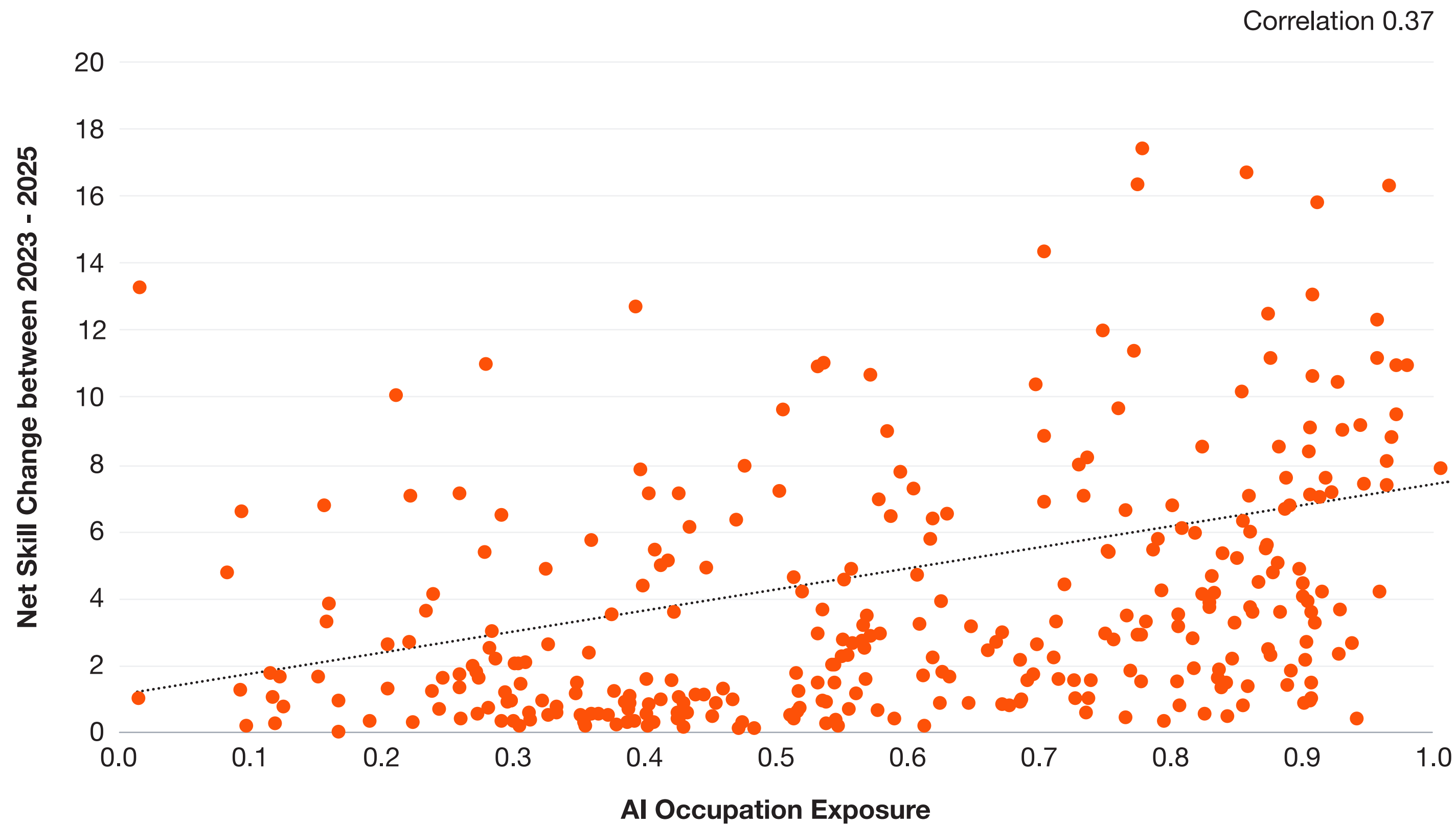
Findings

- In more AI-exposed sectors, AI wage premiums are higher, reflecting stronger demand for AI skills where they are more widely used. Technology, Media and Telecoms (TMT) (22%) and Professional Services (17%) record the highest premiums.
- Healthcare is the only sector with a negative premium, indicating weaker demand for AI skills and scope for further adoption.

Source: PwC analysis, Lightcast data

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

Net skill change from 2023 to 2025 for 4-digit ISCO code occupations by AI occupation exposure, Japan



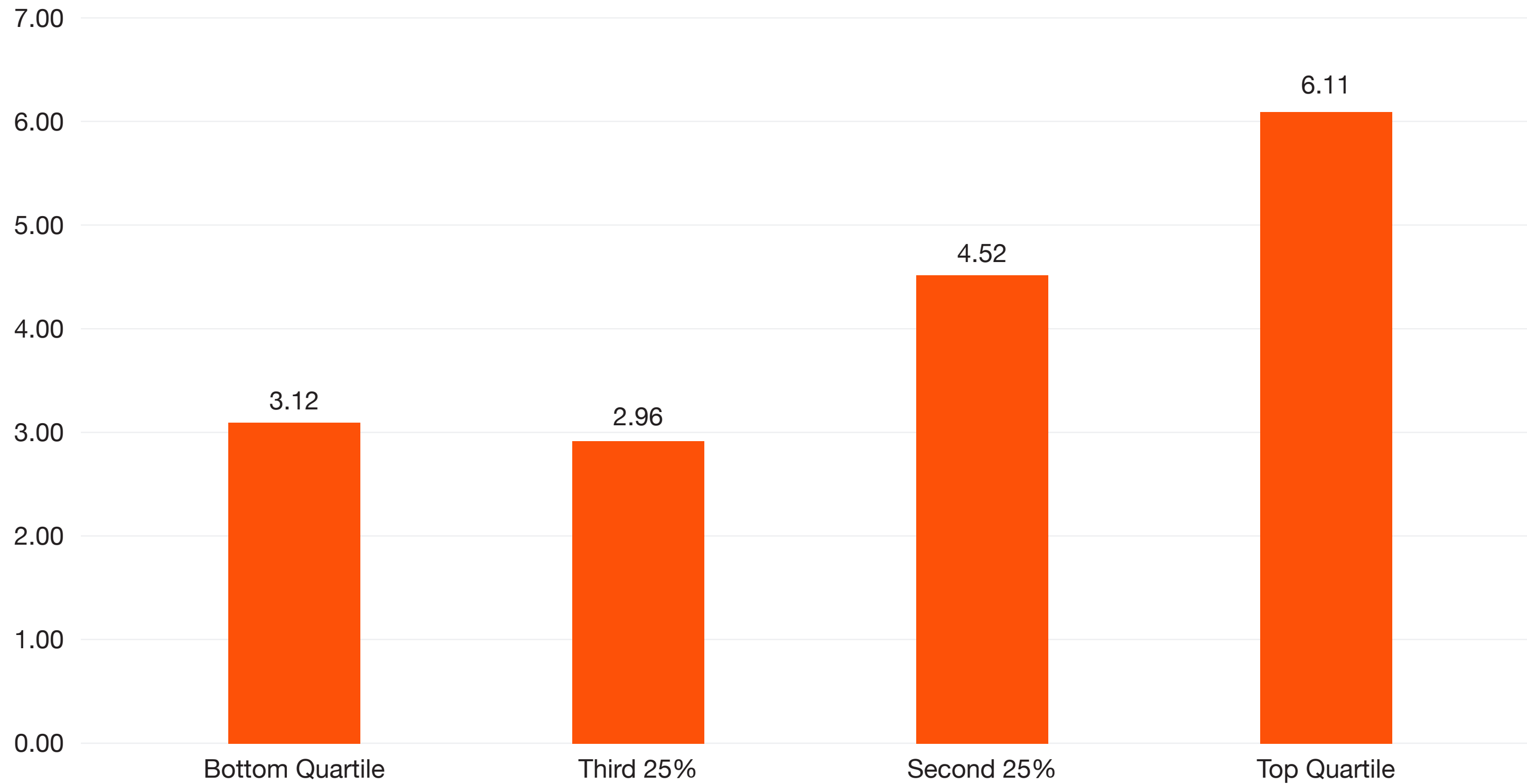
Findings

- There is a positive correlation of 0.37 between AI exposure and net skills change between 2023 and 2025, indicating that more exposed occupations tend to see greater shifts in skill requirements.
- This suggests that AI-exposed roles in Japan tend to adapt more rapidly, with evolving task demands reshaping the capabilities required.

Source: PwC analysis, Lightcast data

This can be seen across exposure quartiles, where the most AI-exposed occupations show greater skill shifts

Average net skill change from 2023 to 2025 for 4-digit ISCO code occupations by AI occupation exposure quartile, Japan



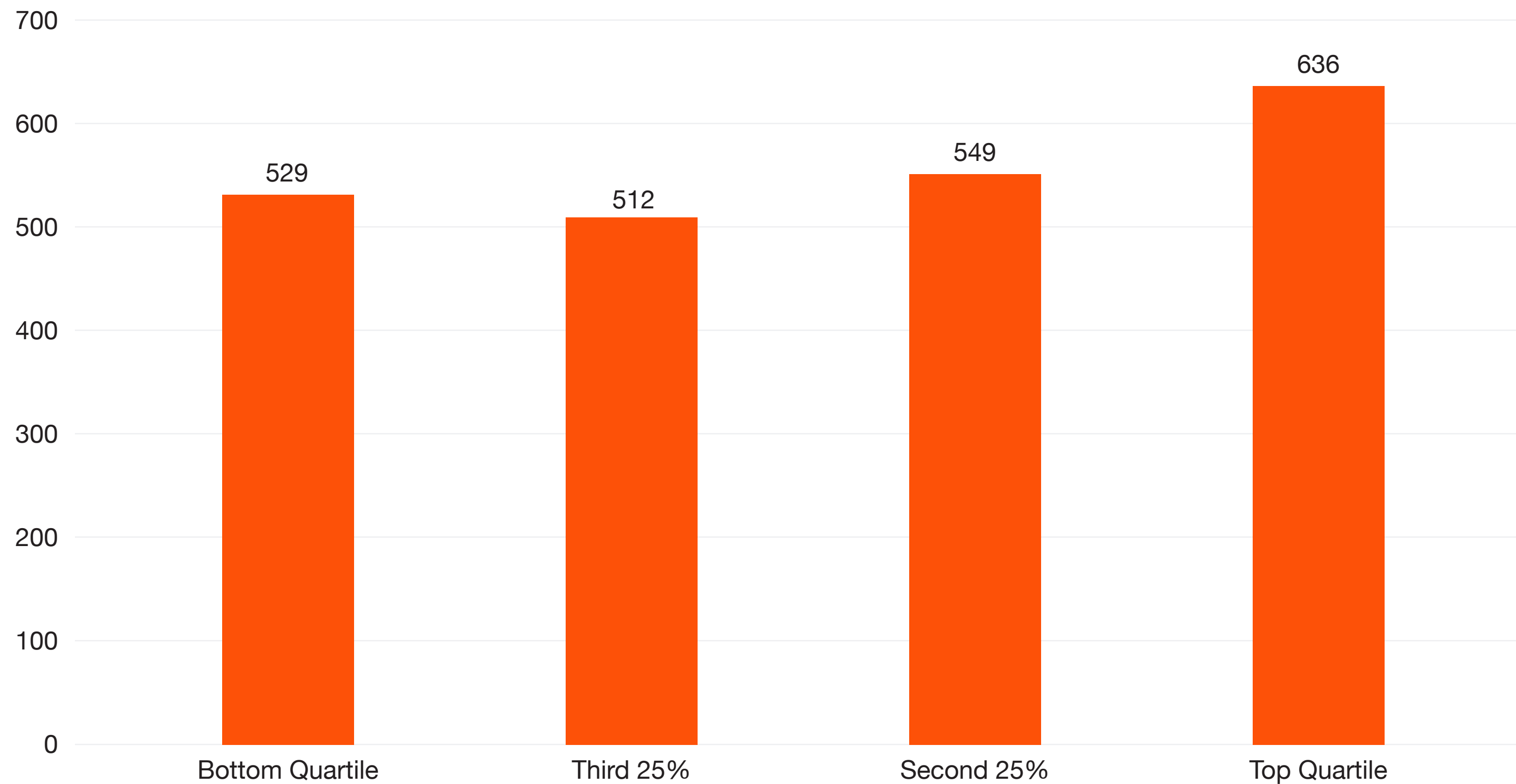
Source: PwC analysis, Lightcast data

Findings

- Occupations in the highest AI exposure group show faster skills transformation between 2023 and 2025 compared to lower exposure quartiles.
- Although the pattern is not fully linear across all quartiles, the increase becomes more pronounced at higher exposure levels. Higher exposure quartiles follow a gradual upward progression, with each successive quartile seeing higher average net skill change.

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, Japan, 2025 relative to 2023



Source: PwC analysis, PwC AI Occupational Exposure Index, Lightcast data

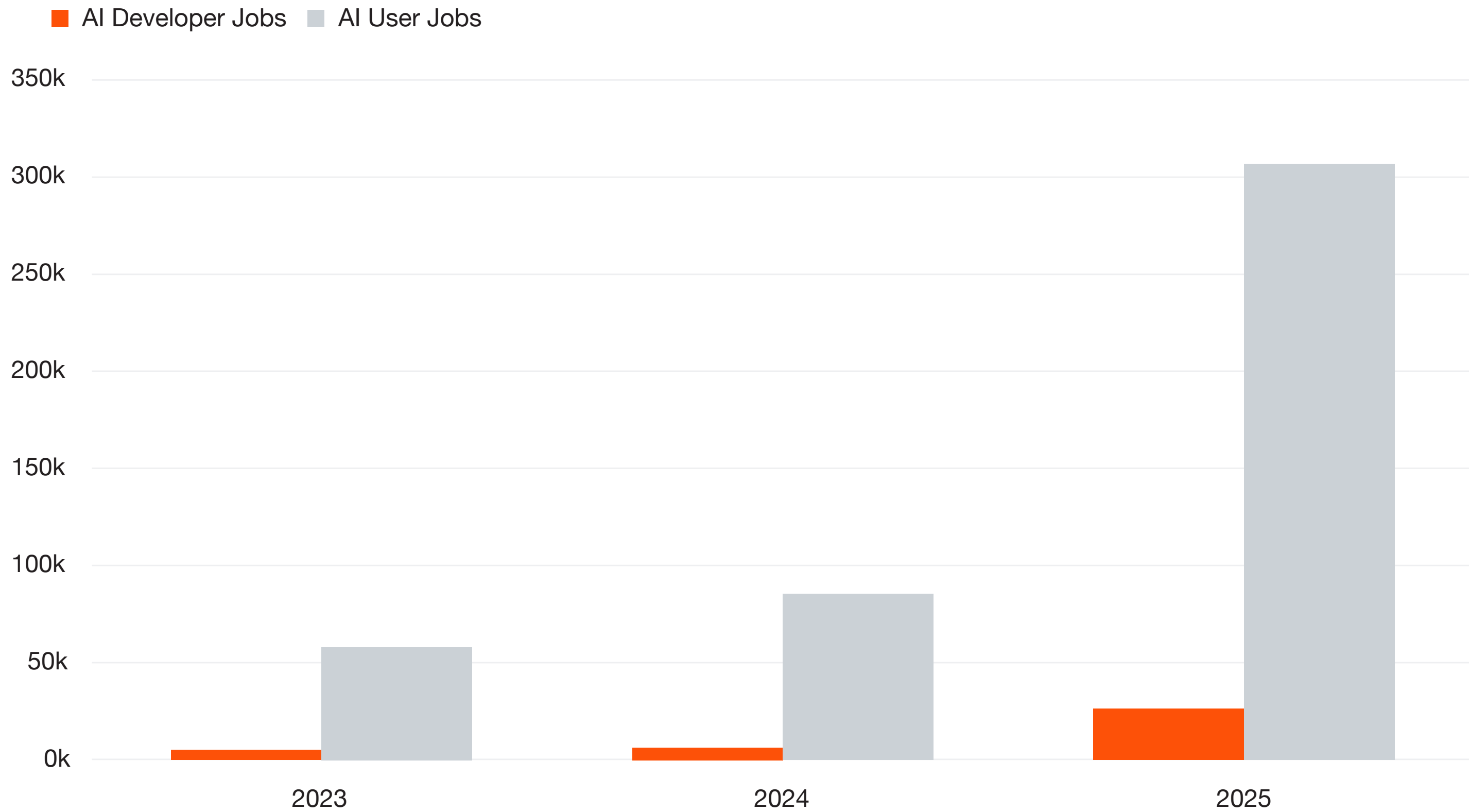
Notes: We define a ‘new skill’ as any skill that has greater than 10 mentions in an occupation in 2025, but 5 or less mentions in that same occupation in 2023. Across all postings for an occupation in a given country, we count the number of ‘new skills’ required for that occupation.

Findings

- We find a positive relationship between AI exposure and the number of new skills required within occupations. Specifically, occupations in the highest AI exposure quartile exhibit the greatest average number of newly emerging skills between 2023 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.
- Although the pattern is not fully linear across all quartiles, the increase becomes more pronounced at higher exposure levels, with the top quartile averaging 636 new skills per occupation. This suggests that skill expansion is greatest among the most AI-exposed occupations.
- Some of this increase may reflect higher posting volumes in more exposed occupations, but it is also consistent with underlying job growth and evolution, as expanding roles require a broader and more diverse set of skills.

AI job demand in Japan is dominated by user roles, with strong growth across both user and developer roles

Total number of AI user and AI developer job roles, Japan, 2023-2025



Source: PwC analysis, Lightcast data

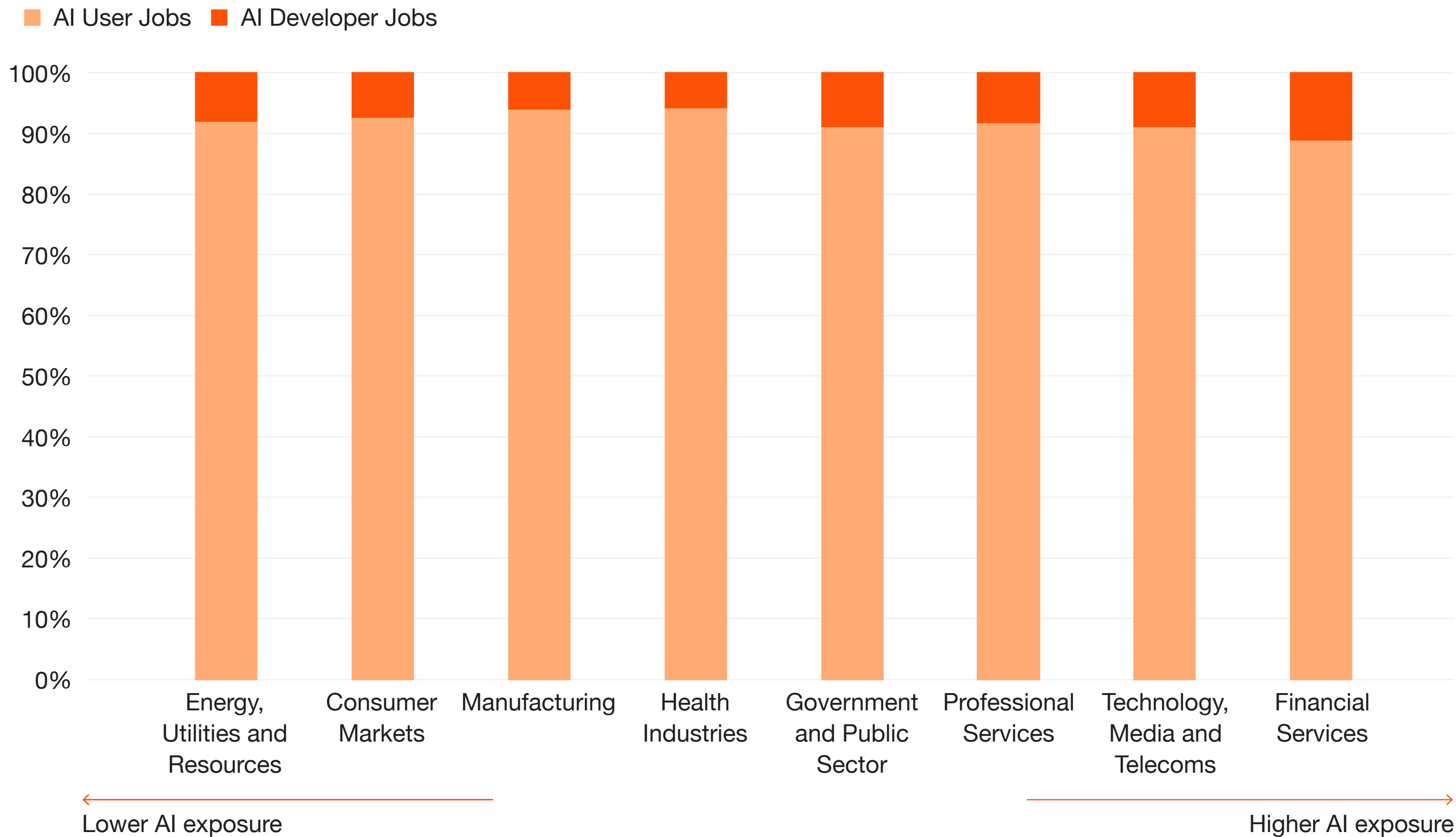
Notes: AI user and AI developer job roles are determined as jobs requiring Tier 0 or 1 skills (AI literacy and applied AI skills) for AI user jobs and Tier 2 skills (advanced AI skills) for AI developer jobs. AI developer jobs are tagged as such if there are any skills in the job postings data requiring Tier 2 skills for a specific job role.

Findings

- AI user roles account for the majority of AI-related jobs and continue to drive overall demand, increasing by **~227k** roles in 2025.
- In contrast, AI developer roles remain lower but stable, growing by around **19.9k** in 2025.
- Growth has been strong across both categories in the last year, indicating continued expansion in both adoption and development of AI capabilities.

Across sectors, AI job postings in Japan remain concentrated in capabilities related to the use of AI rather than its development

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



Findings

- AI user roles account for the largest share across most sectors, indicating a strong focus on deploying and integrating AI into existing workflows.
- **Government and Public Sector** shows the highest share of **AI developer** roles (**9.1%**), indicating greater focus in the development of sector specific advanced AI tools.
- **Health Industries** records the highest share of **AI user** roles (**94.1%**), reflecting broad-based adoption of AI across operational roles rather than in-house development.

Source: PwC analysis, Lightcast data

Notes: 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.

Contacts



Takuya Fujikawa
Chief AI Officer, Partner,
PwC Japan



Hitoshi Kondo
Chief Data Officer, Partner,
PwC Japan



Ryota Mochizuki
AI Transformation Consulting
Lead, Partner, PwC Japan



Shigeru Kitazaki
Workforce Consulting Lead,
Partner, PwC Japan



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