Two Futures for Jobs in an AI era

2026 Global AI Jobs Barometer

Spain 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.

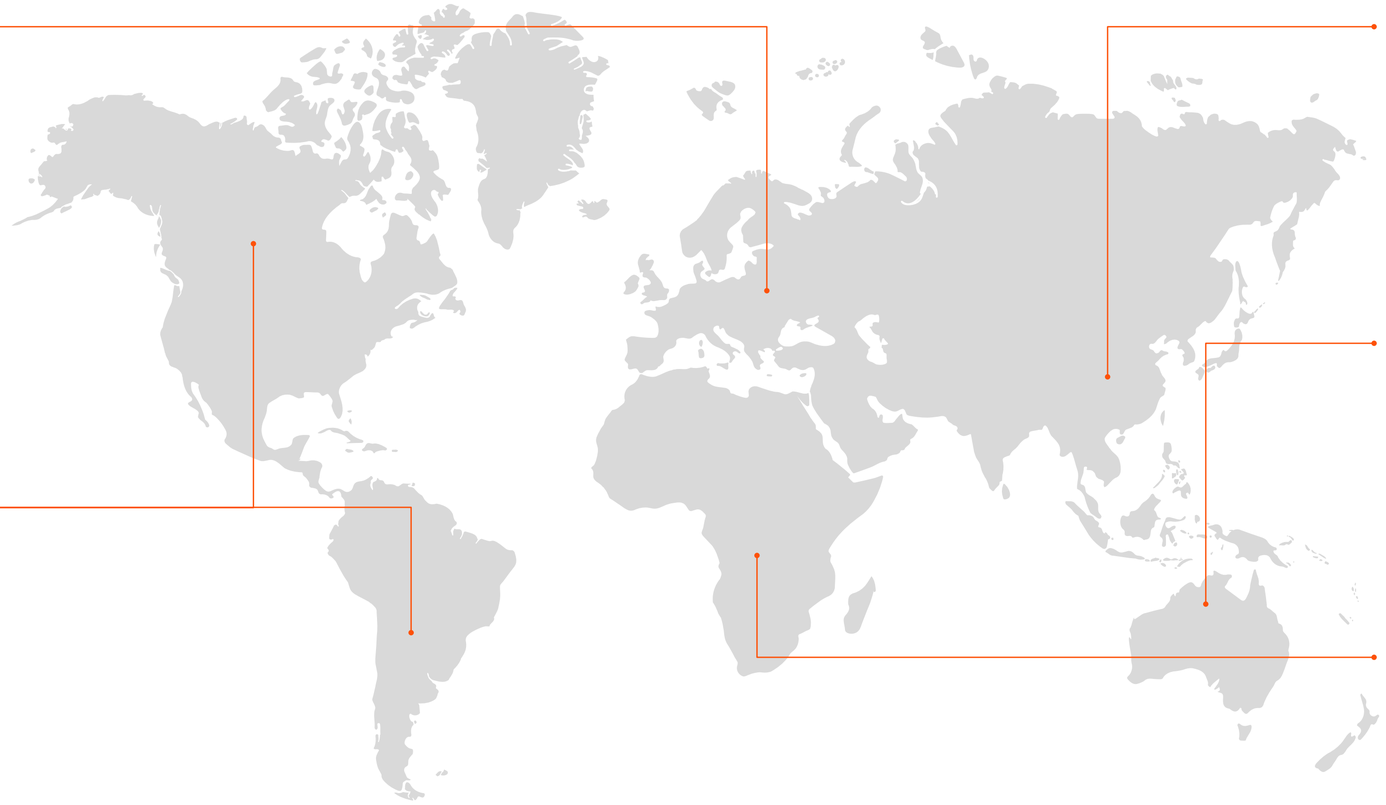
35%

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.

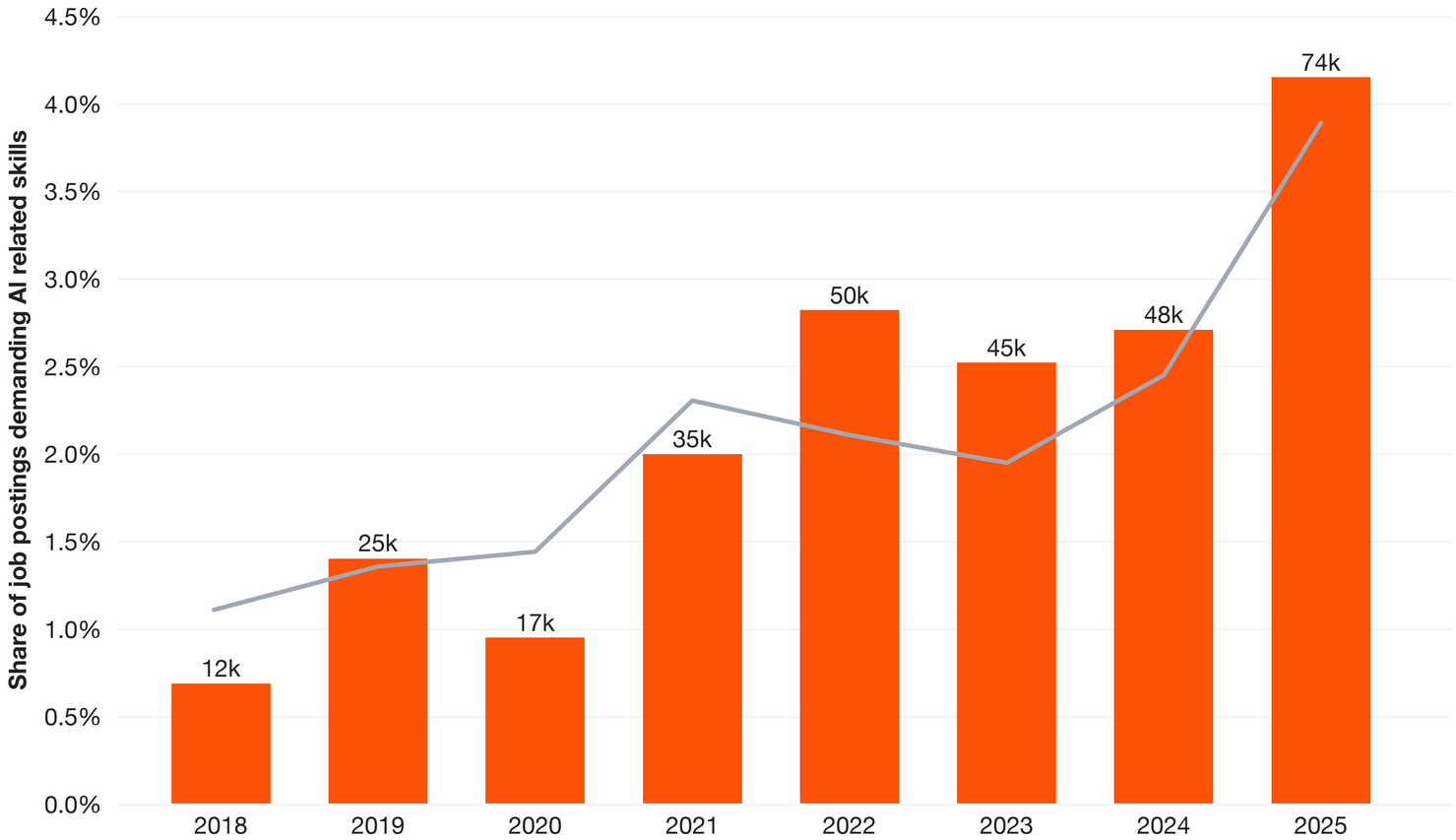
The 2026 AI Jobs Barometer examines over one billion job ads from 6 continents to reveal how AI is affecting jobs, skills, wages, and labour productivity



Spain Insights

In 2025, both the volume and share of AI job postings have increased in Spain

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



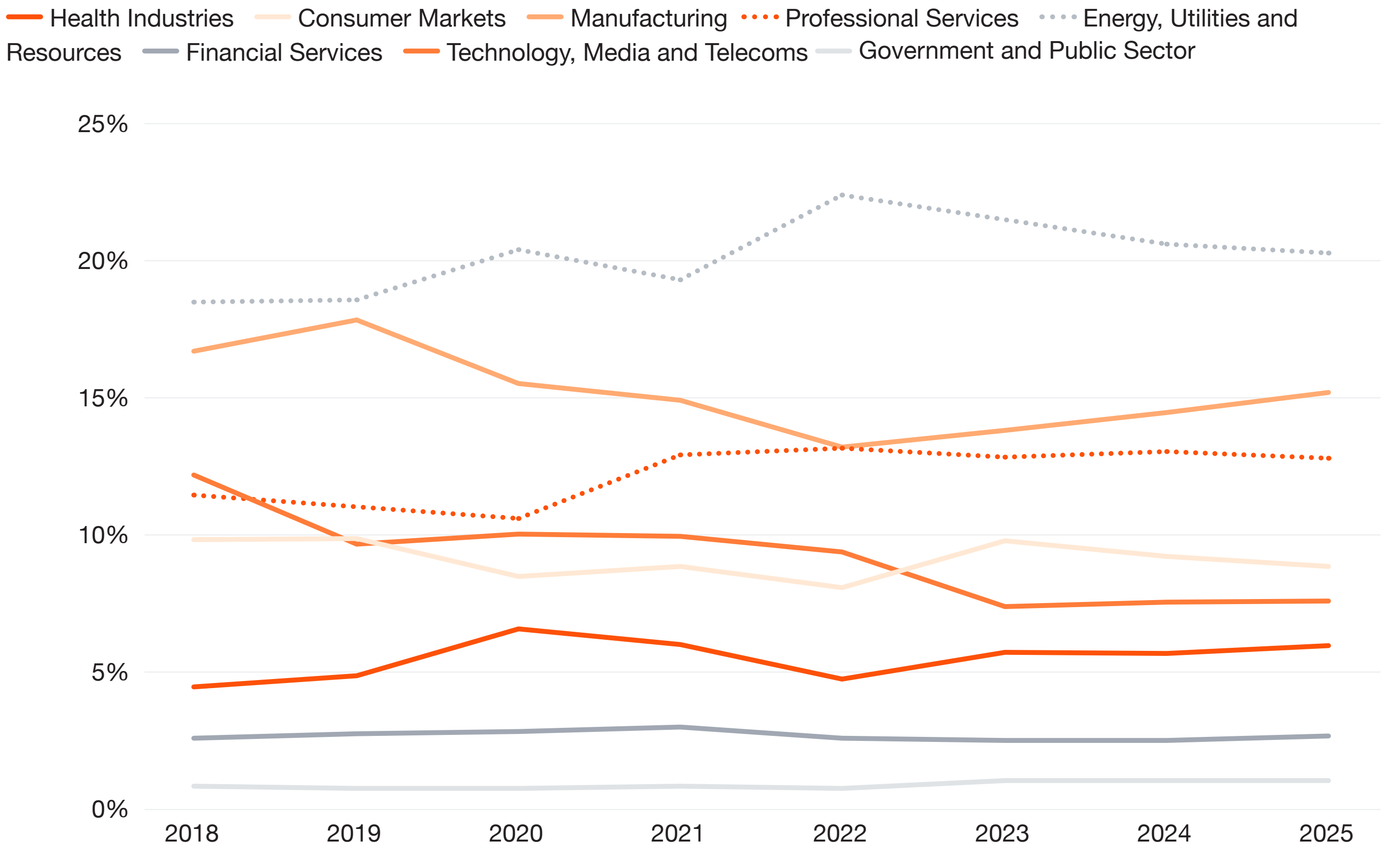
Source: PwC analysis, Lightcast data

Findings

- The number of job postings for Spain requiring AI skills increased by around 26k in 2025. This brings AI hiring volumes to a new peak, signalling momentum in AI hiring demand.
- As a result, the share of job postings requiring AI skills reached 4% in 2025.

Energy, Utilities and Resources accounts for the largest share of hiring in Spain's labour market

Share of all job postings by sector, Spain, 2018-2025



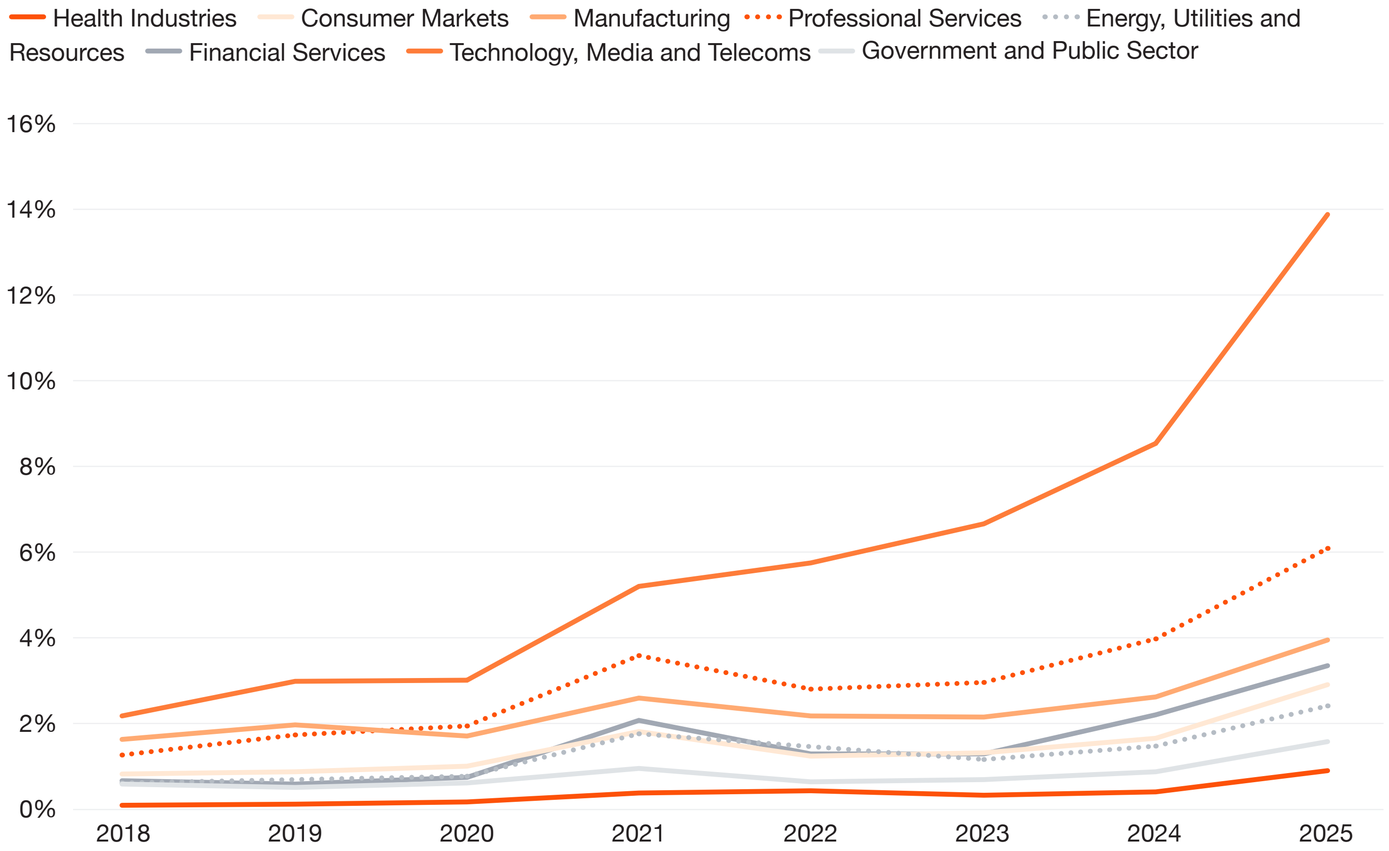
Source: PwC analysis, Lightcast data

Findings

- Energy, Utilities and Resources is the largest source of labour demand in Spain, accounting for 20.3% of total job postings.
- Manufacturing (15.2%) and Professional Services (12.8%) also represent significant shares of hiring.
- Other sectors account for smaller shares but still contribute meaningfully to overall hiring across the economy, with Government and Public Sector seeing the smallest share of 1.0%.

AI hiring intensity is rising across all sectors in Spain and is led by TMT

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



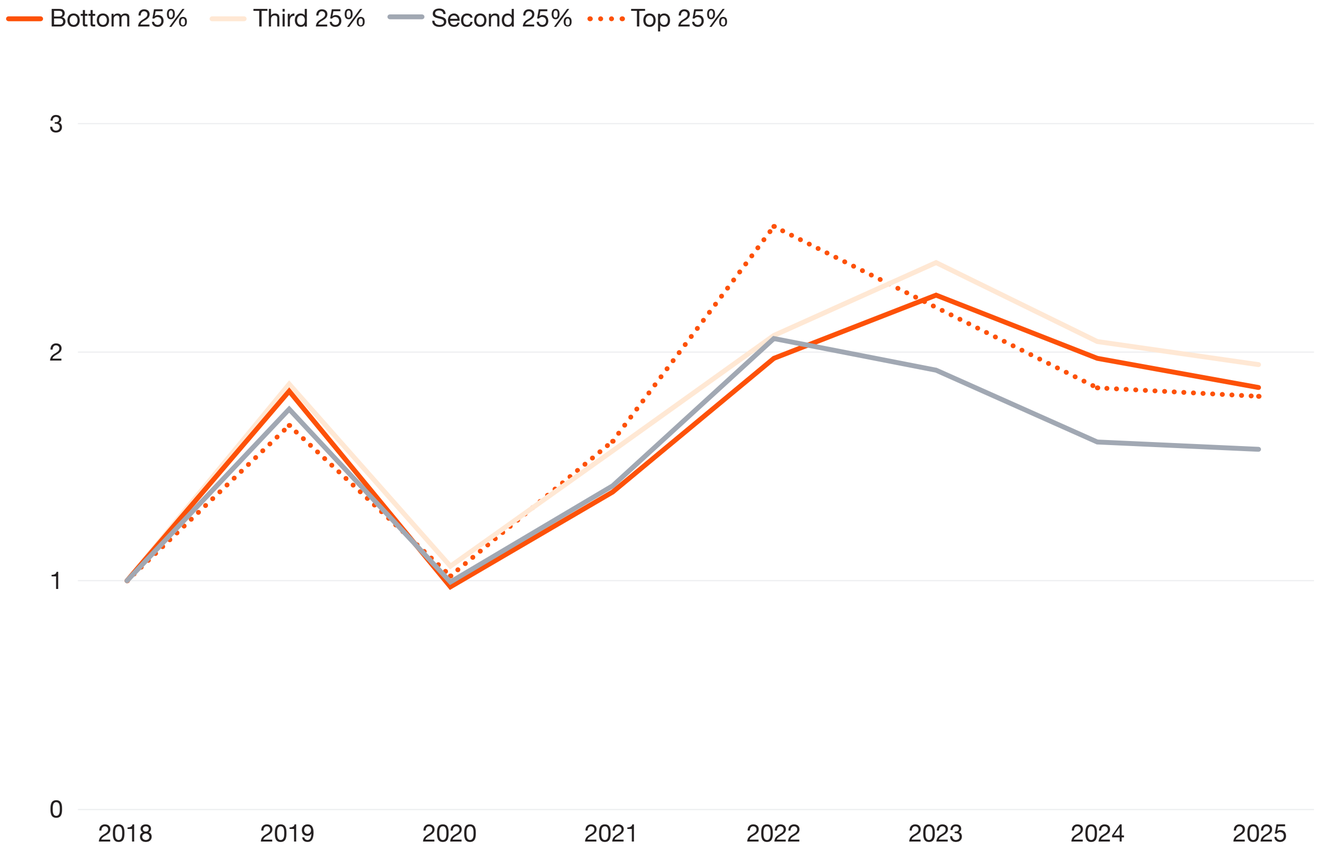
Source: PwC analysis, Lightcast data

Findings

- Technology, Media and Telecoms (TMT) records the highest share of AI job postings in Spain, consistent with its role as the most digitally intensive sector.
- All sectors saw an increase in AI job share in 2025, pointing to broad-based growth in AI hiring.
- This suggests AI adoption in Spain is expanding across the economy, rather than being concentrated in a small set of industries.

In Spain, growth in hiring demand has been relatively modest and broadly similar across AI exposure groups

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



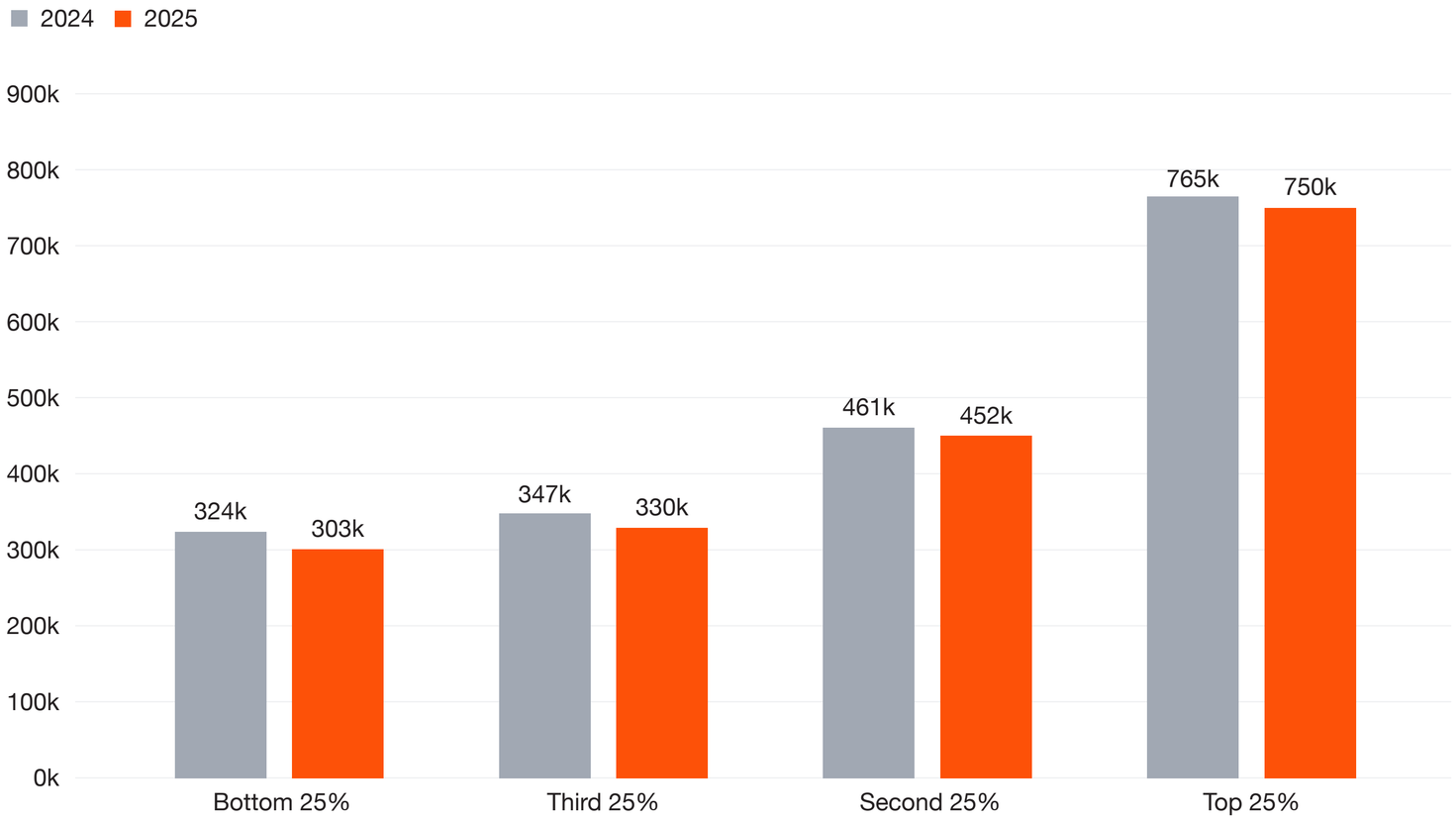
Source: PwC analysis, Lightcast data

Findings

- When grouped by AI exposure, job postings are similar across quartiles, with no clear relationship between exposure and growth. Posting levels have also remained broadly stable in recent years.
- By 2025, all quartiles show modest increases in job postings relative to 2018, with limited differences between exposure groups.

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

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



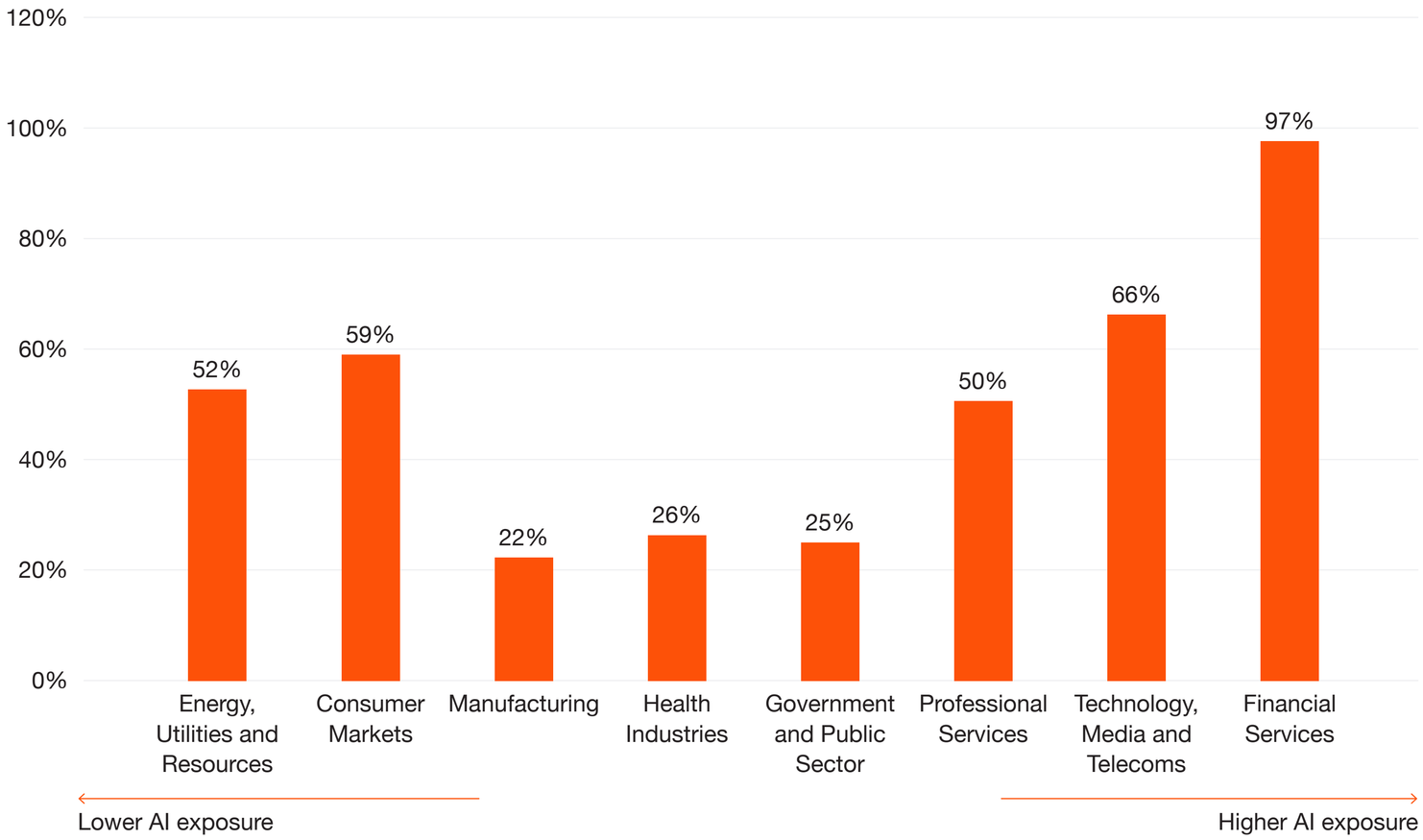
Source: PwC analysis, Lightcast data

Findings

- While there is no clear relationship between AI exposure and job postings growth over time, higher exposure quartiles account for more postings in absolute terms.
- In 2025, the most AI-exposed quartile recorded around 750,000 job postings, higher than lower exposure groups.

AI wage premiums in Spain are largest in the most AI-exposed sectors

Wage premium by sector, Spain, 2025



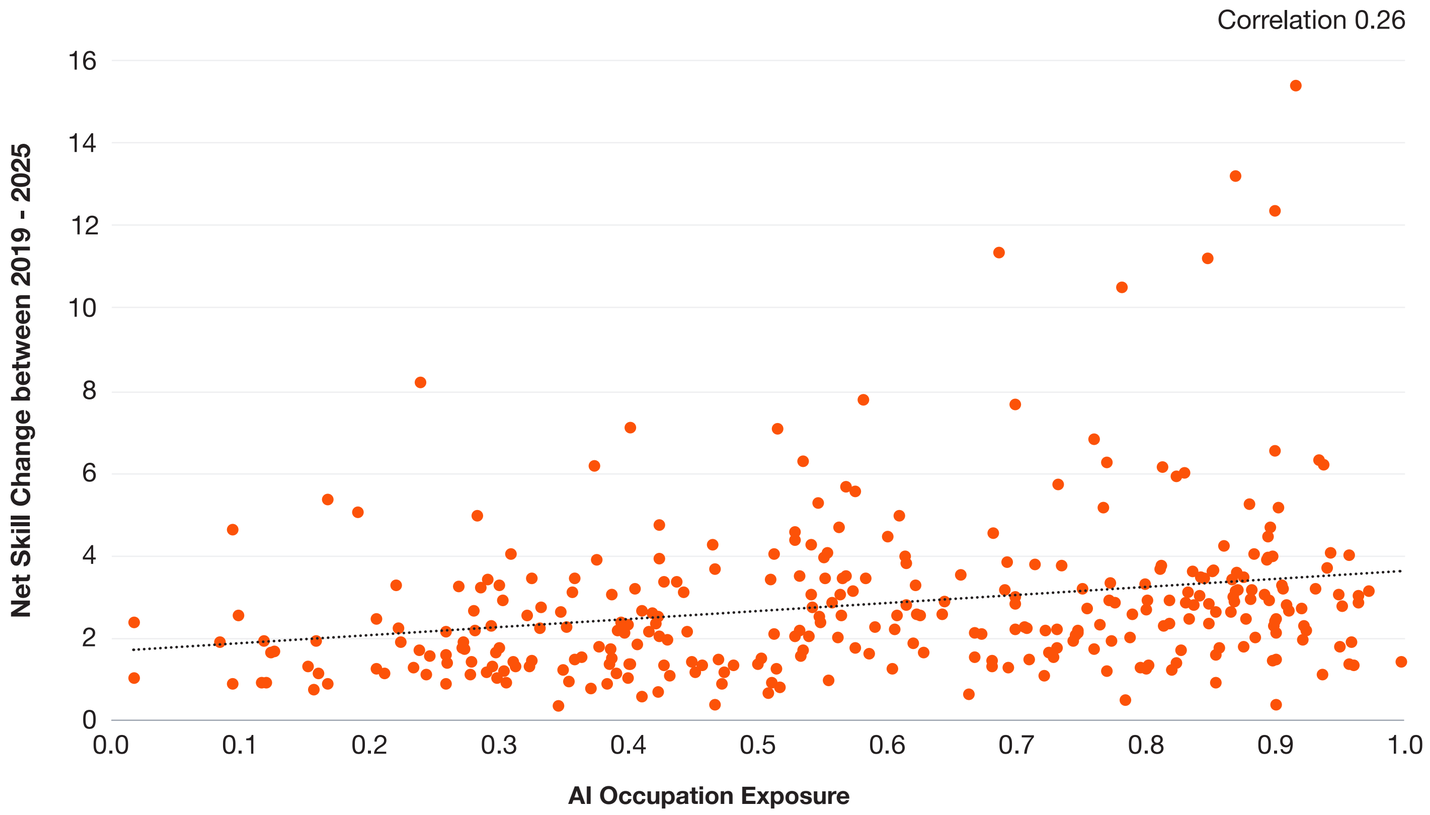
Findings

- AI wage premiums form a U-shaped pattern across sectors, with higher premiums observed in both lower and higher AI exposure industries.
- In more AI-exposed sectors, Financial Services and Technology, Media and Telecoms (TMT) record the highest premiums, reflecting strong demand for AI skills where adoption is more advanced.
- Overall, while premiums are also present in lower exposure roles, they are most pronounced in sectors where AI skills are more widely used.

Source: PwC analysis, Lightcast data

In Spain, 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, Spain



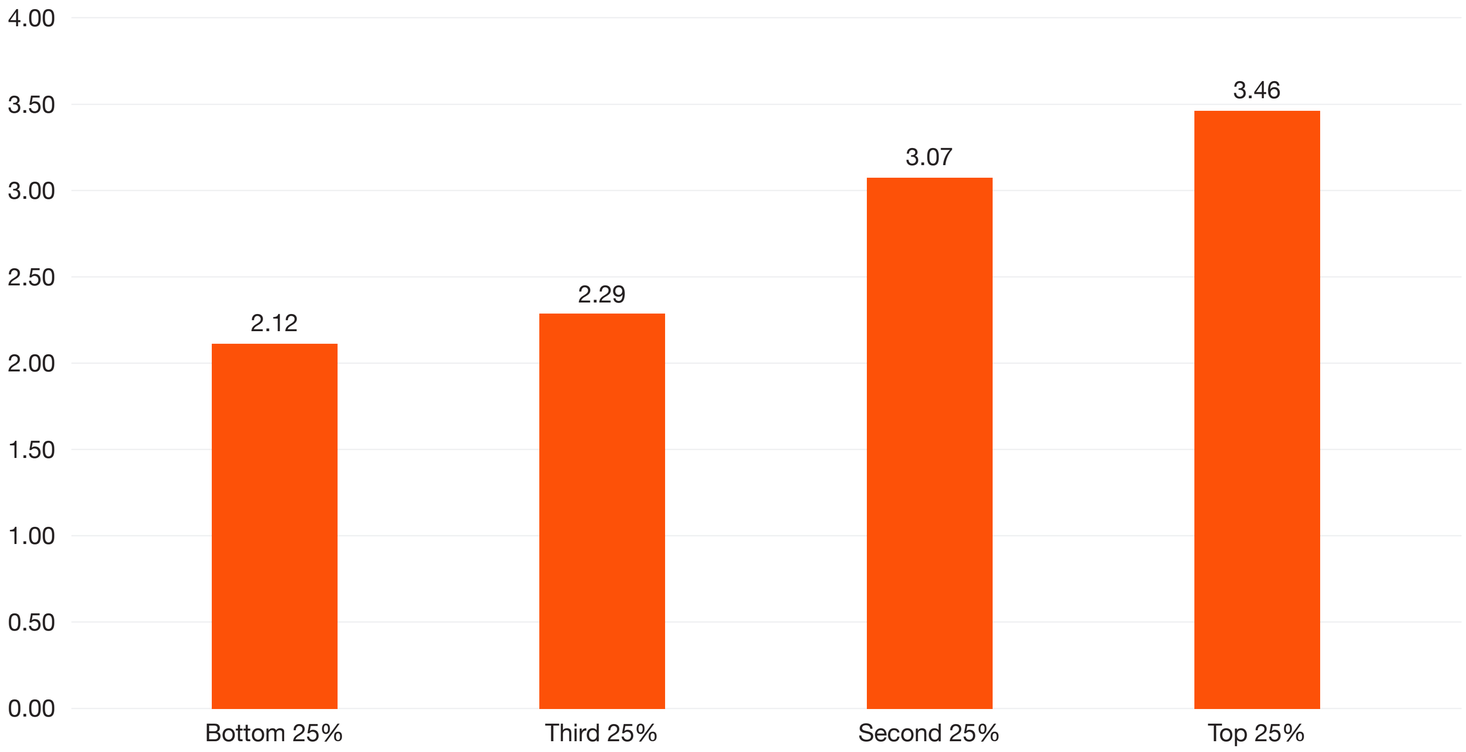
Source: PwC analysis, Lightcast data

Findings

- There is a positive correlation of 0.26 between AI exposure and net skills change between 2019 and 2025, indicating that more exposed occupations tend to see greater shifts in skill requirements.
- This suggests that AI-exposed roles in Spain tend to adapt more rapidly, with evolving task demands reshaping the capabilities required.

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, Spain



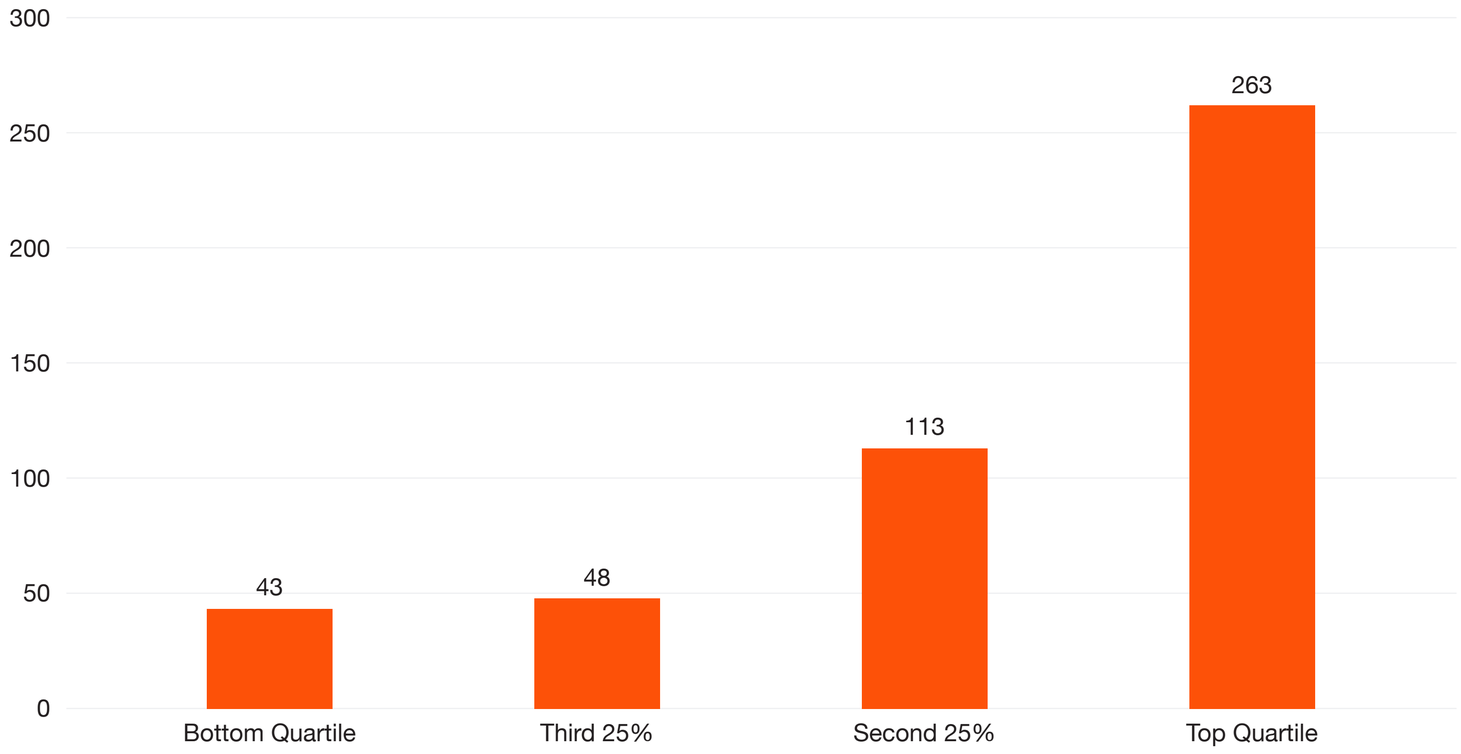
Source: PwC analysis, Lightcast data

Findings

- The same pattern observed earlier is reflected across exposure quartiles: occupations in the highest AI exposure group show the fastest skills transformation between 2019 and 2025.
- Lower exposure quartiles also follow a gradual upward progression, with each successive quartile seeing higher average net skill change.
- This reinforces the earlier finding of a positive relationship between AI exposure and skills change in Spain, where more exposed occupations tend to evolve faster as task requirements shift.

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, Spain, 2025 relative to 2019



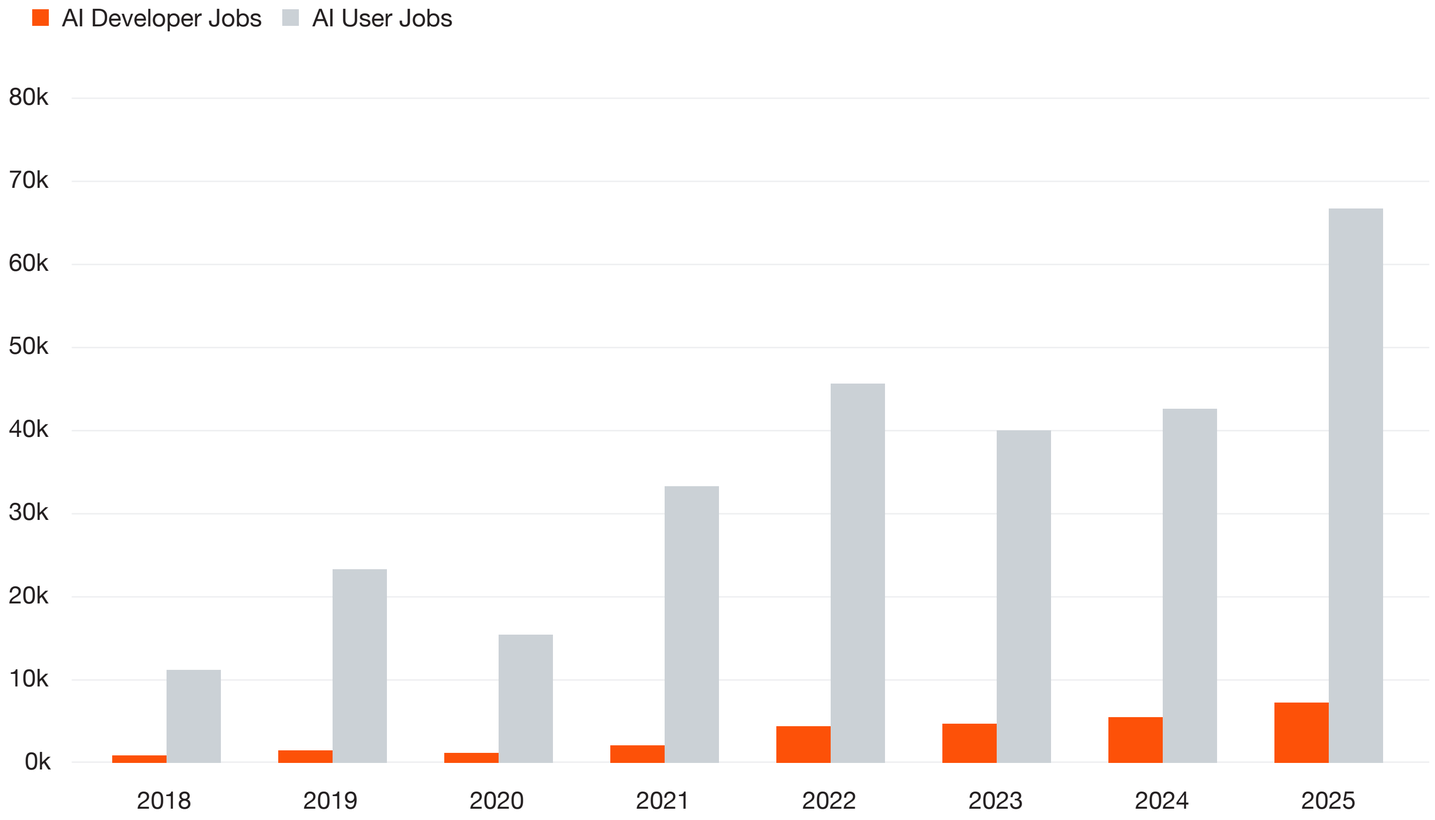
Source: PwC analysis, PwC AI Occupational Exposure Index, Lightcast data
Notes: We define a ‘new skill’ as any skill that has greater than 10 mentions in an occupation in 2025, but five or less mentions in that same occupation in 2019. Across all postings for an occupation in a given country, we count the number of ‘new skills’ required for that occupation.

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 263 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 Spain is dominated by user roles, with strong growth across both user and developer roles

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



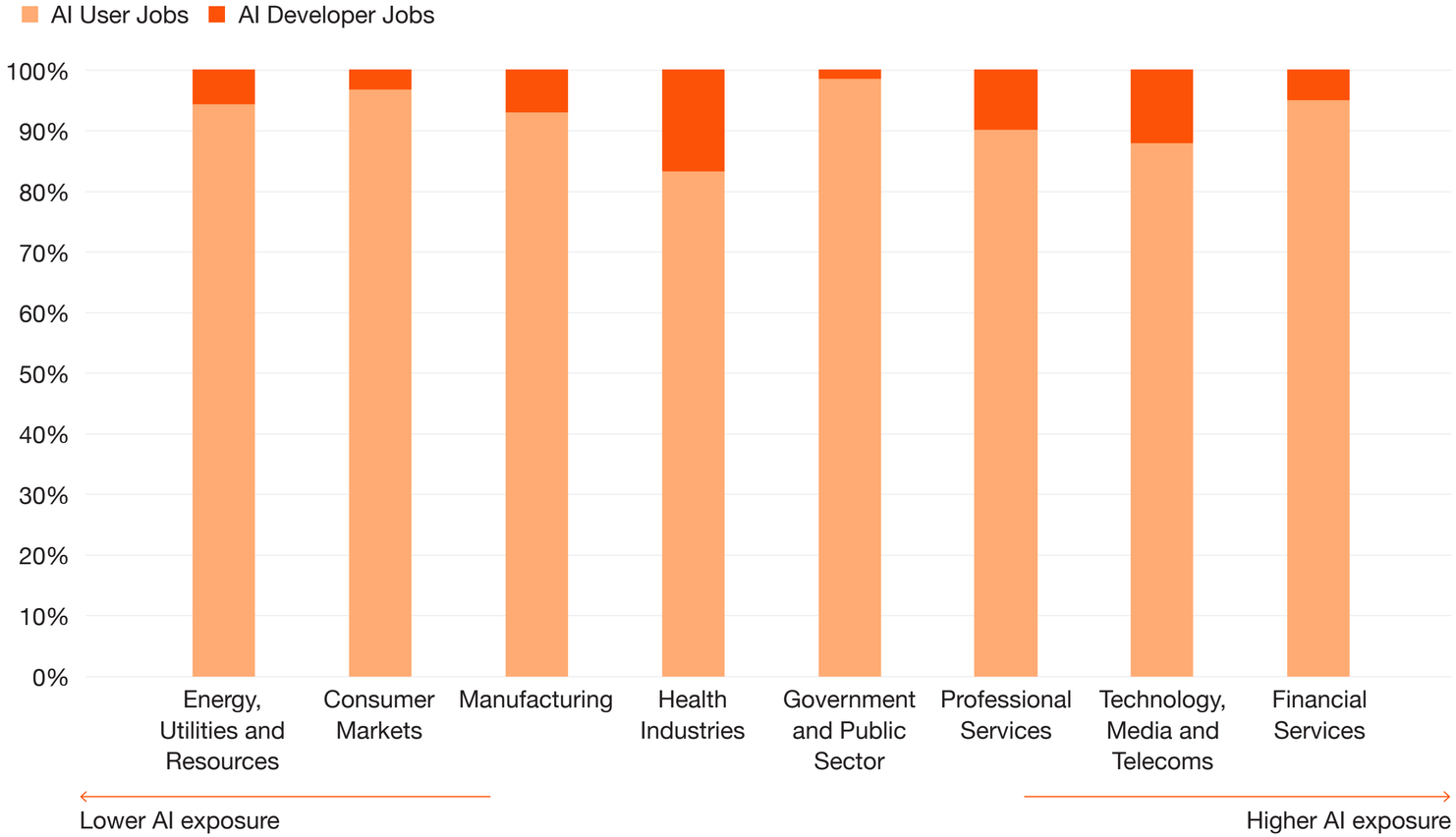
Source: PwC analysis, Lightcast data
Notes: AI user and AI developer job roles are determined as jobs requiring Tier 0 or 1 skills (AI literacy and applied AI skills) for AI user jobs and Tier 2 skills (advanced AI skills) for AI developer jobs. AI developer jobs are tagged as such if there are any skills 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 **~24k** roles in 2025, despite a dip in 2022.
- In contrast, AI developer roles remain lower but stable, growing by around **~1.8k** in 2025.
- Growth has been strong across both categories in the last year, with AI user roles increasing by **56.6%** and AI developer roles by **32.7%**, indicating continued expansion in both adoption and development of AI capabilities.

Across sectors, AI job postings in Spain 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, Spain, 2025



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Findings

- AI user roles account for the largest share across most sectors, indicating a strong focus on deploying and integrating AI into existing workflows.
- **Health Industries** shows the highest share of **AI developer** roles **(16.9%)**, indicating greater focus in the development of sector specific advanced AI tools.
- **Consumer Markets** records the highest share of **AI user** roles **(96.8%),** reflecting broad-based adoption of AI across operational roles rather than in-house development.

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