Two Futures for Jobs in an AI era

2026 Global AI Jobs Barometer

New Zealand 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.

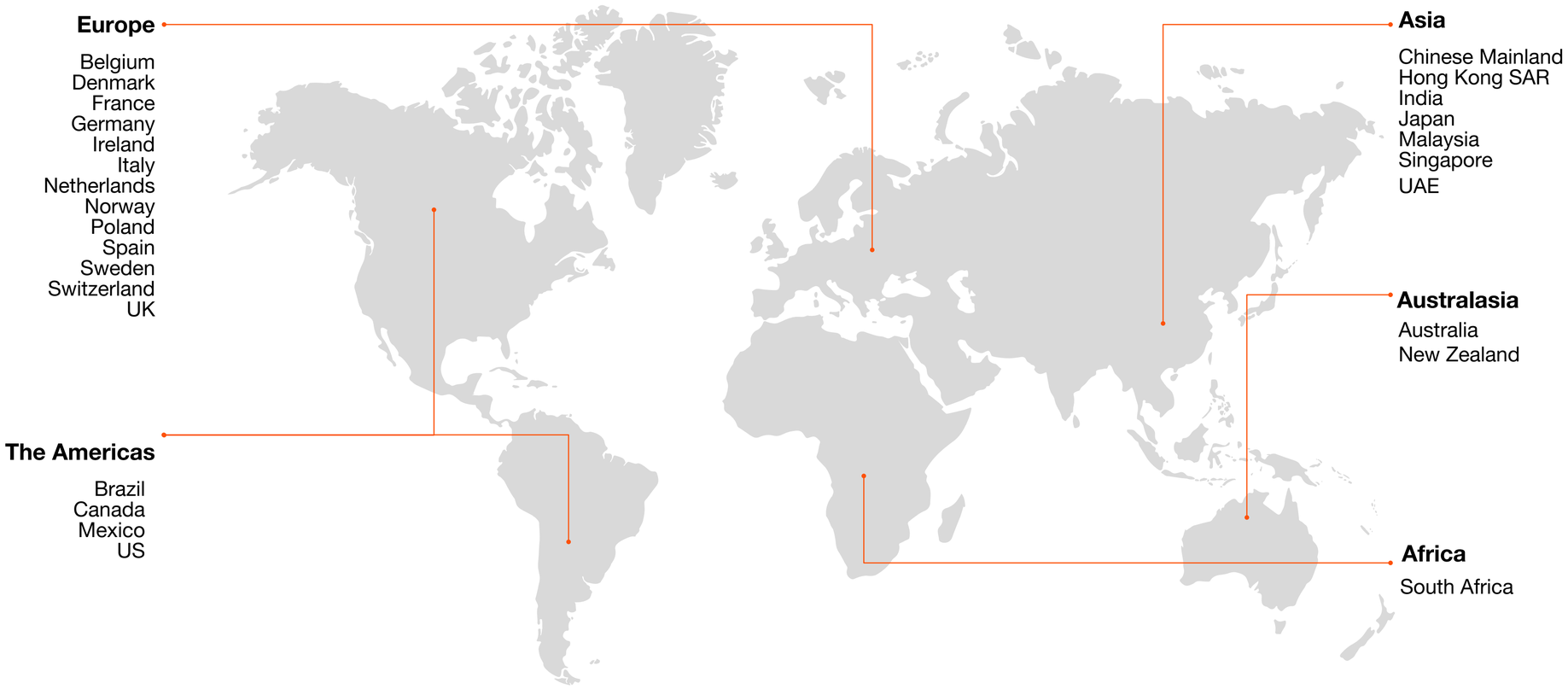
35%

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.

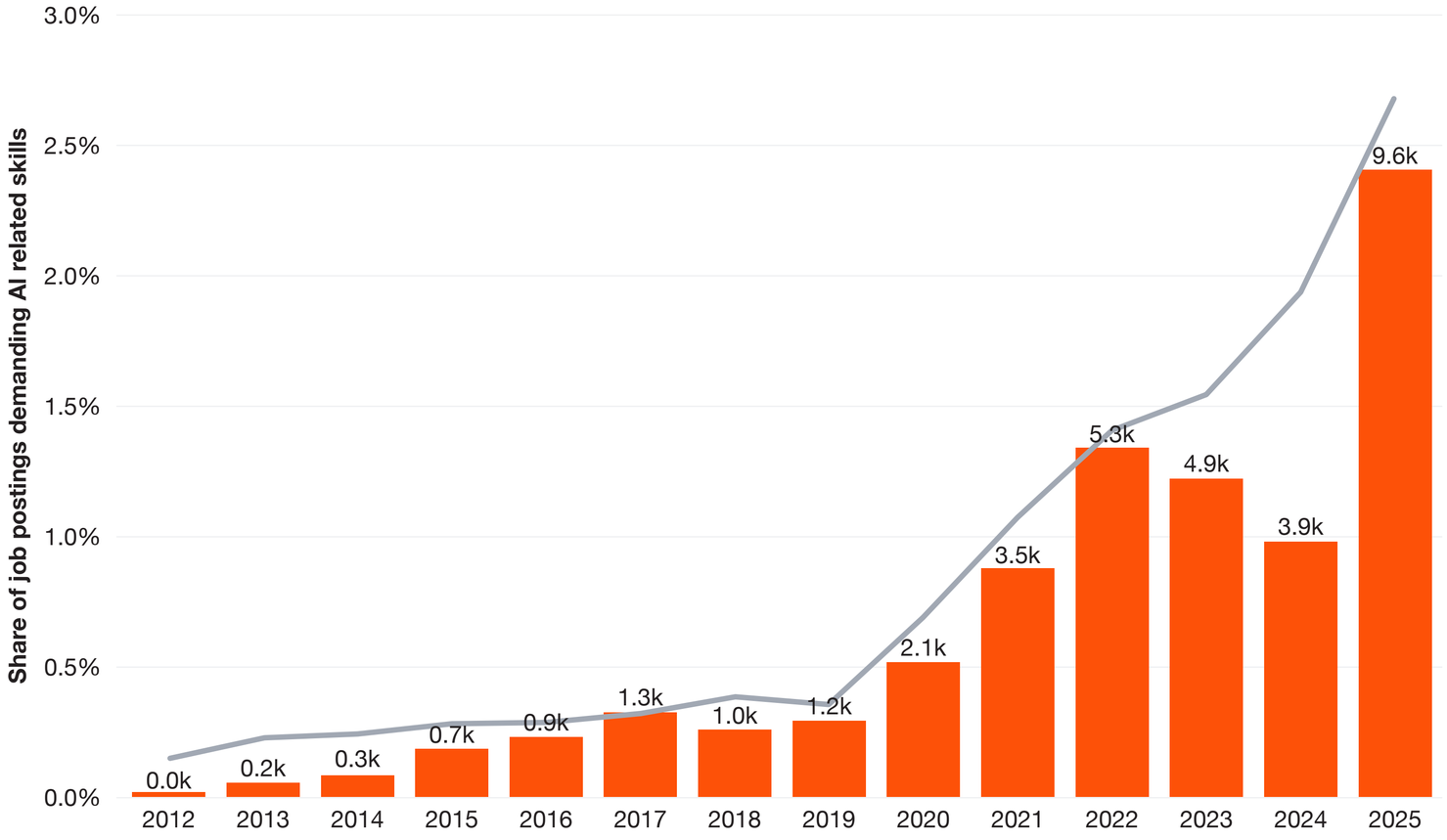
The 2026 AI Jobs Barometer examines over one billion job ads from 6 continents to reveal how AI is affecting jobs, skills, wages, and labour productivity



New Zealand Insights

AI hiring in New Zealand has rebounded in 2025, surpassing the 2022 peak levels after a dip in the previous two years

Total number and share of job postings requiring AI related skills, New Zealand, 2012-2025



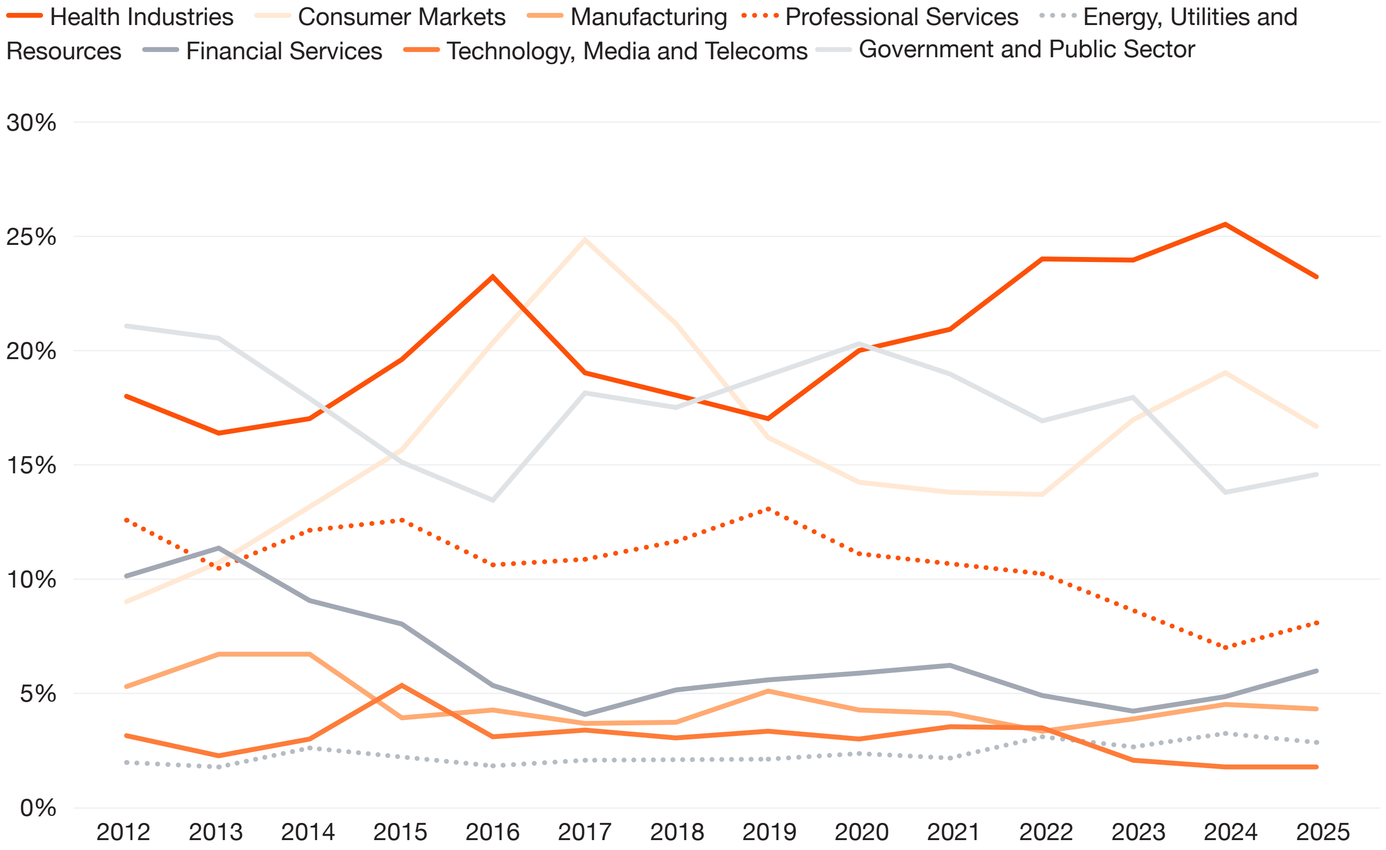
Source: PwC analysis, Lightcast data

Findings

- AI job postings in New Zealand increased by around 5.7k in 2025, reversing declines seen in 2023 and 2024.
- This brings AI hiring volumes above the previous peak of 2022, signalling renewed momentum in demand.
- As a result, the share of job postings requiring AI skills reached 2.7% in 2025.

Healthcare accounts for the largest share of hiring in New Zealand, followed by Consumer Markets and Government and Public Sector

Share of all job postings by sector, New Zealand, 2012-2025



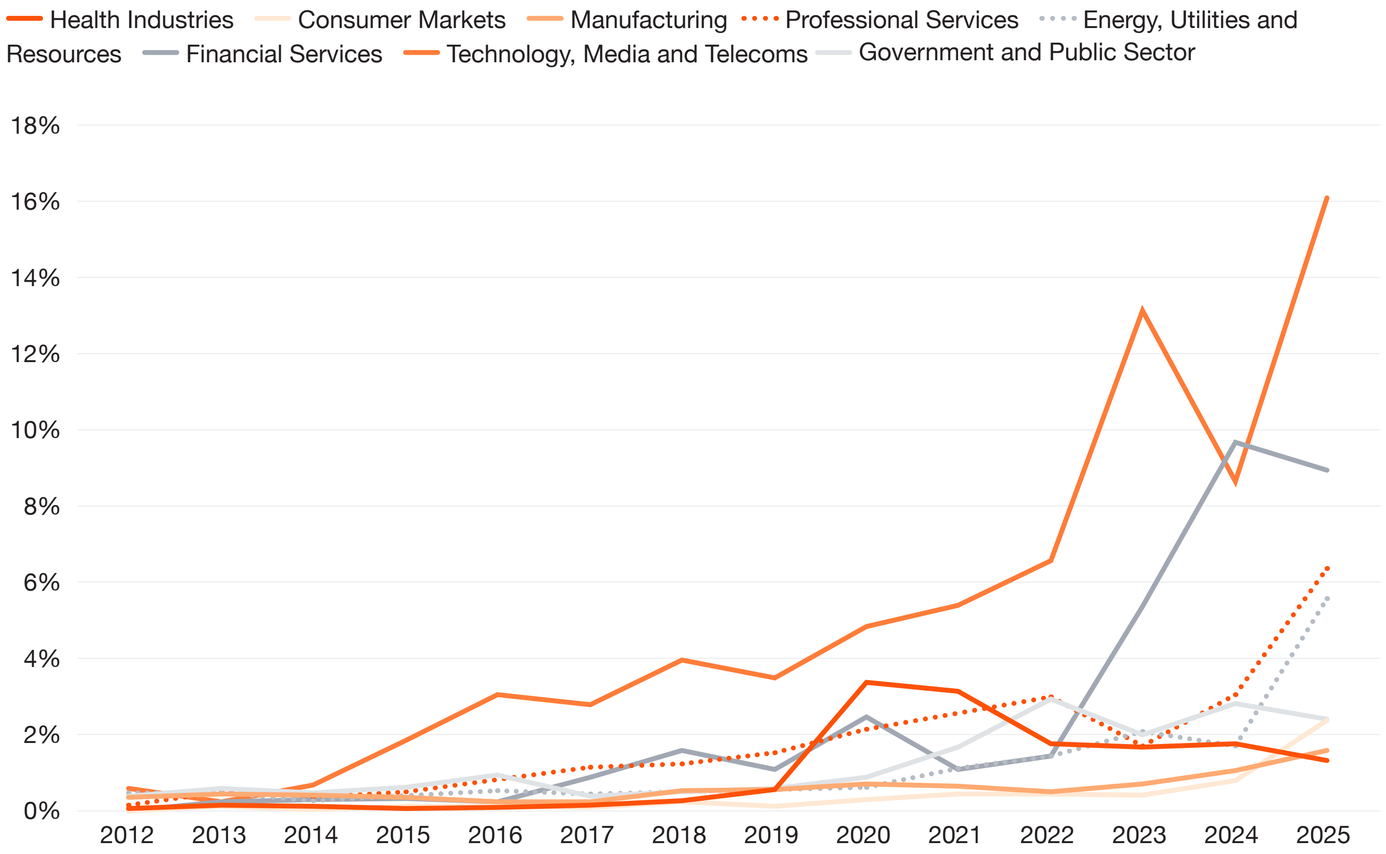
Source: PwC analysis, Lightcast data

Findings

- Healthcare is the largest source of labour demand in New Zealand, accounting for 23.3% of total job postings.
- Consumer Markets (16.7%) and Government and Public Sector (14.6%) also represent significant shares of hiring.
- Other sectors account for smaller shares but still contribute meaningfully to overall hiring across the economy.

TMT leads AI hiring in New Zealand, while most sectors continue to see rising AI adoption

Share of AI job postings within each sector, New Zealand, 2012-2025



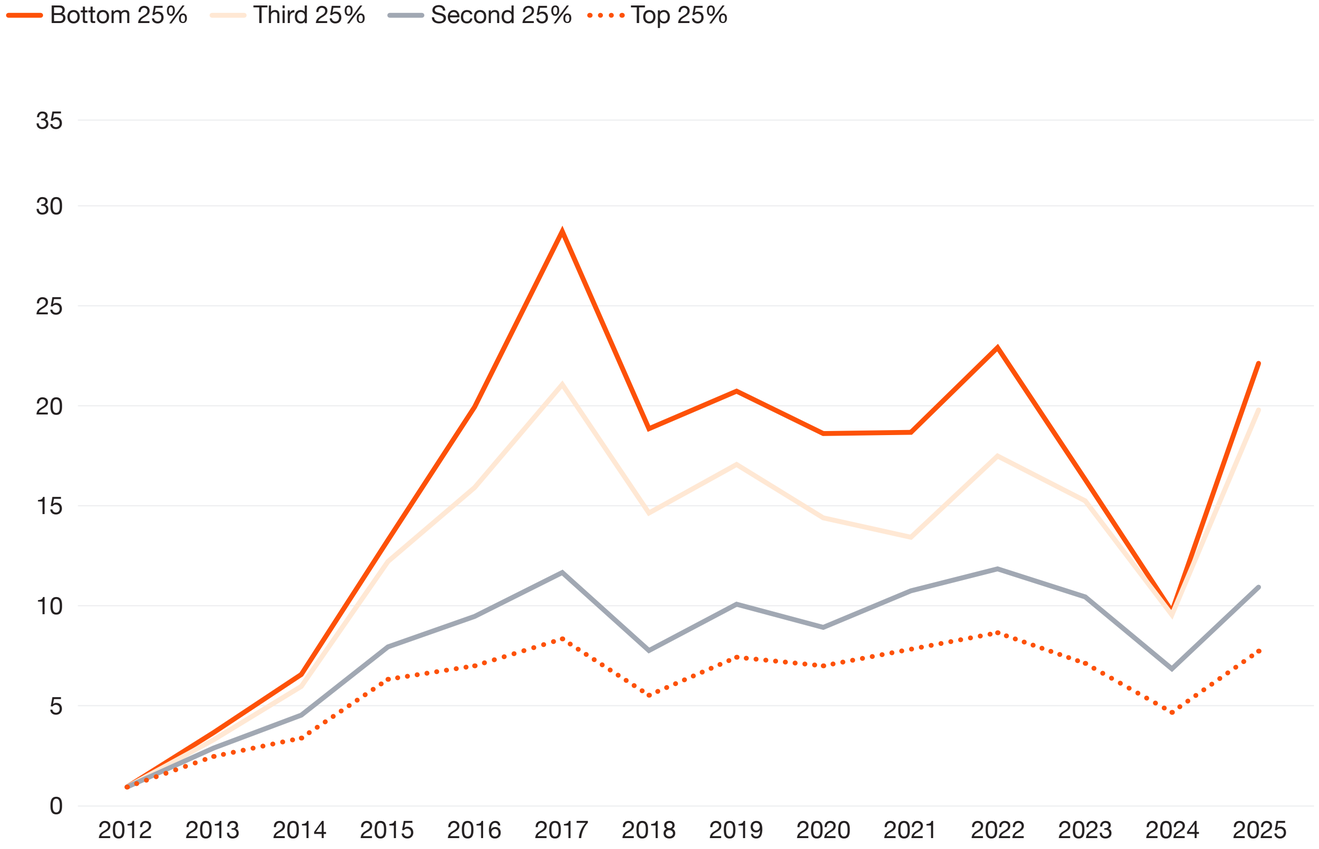
Source: PwC analysis, Lightcast data

Findings

- Technology, Media and Telecoms (TMT) records the highest share of AI job postings, reflecting the sector's strong digital and technology focus.
- Most other sectors have seen increases in AI hiring share, indicating continued adoption across the economy.
- Financial Services, Health, and Government and Public Sector experienced modest dips in AI share in the most recent year. This is unlike most other countries which have seen growth across all sectors.
- These declines, however, are relatively moderate, and the broader trend still points toward growing AI integration across sectors in New Zealand.

In New Zealand, occupations less exposed to AI have seen stronger growth in job postings since 2012

Number of job postings relative to 2012 by AI exposure quartile, New Zealand, 2012-2025



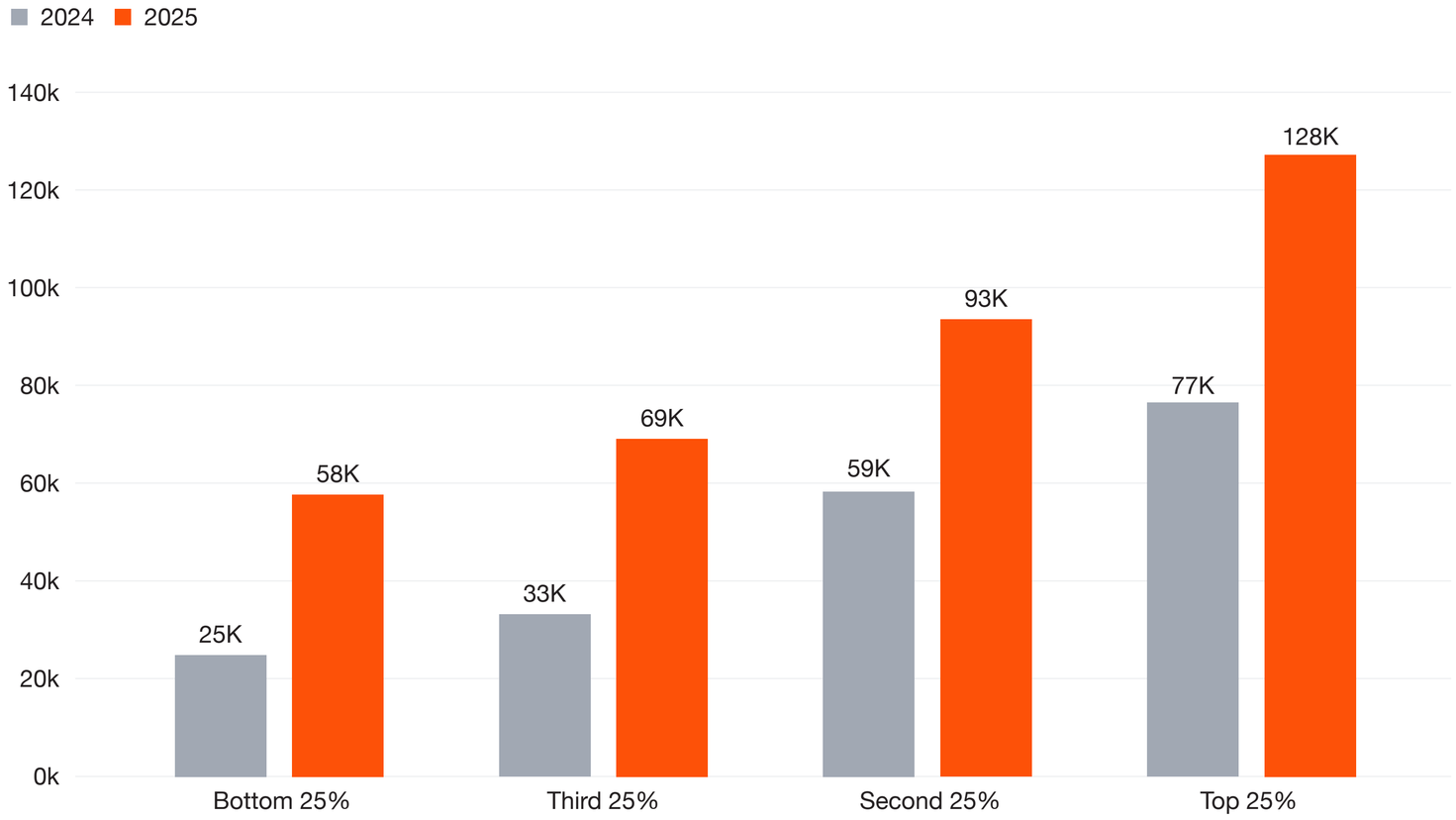
Source: PwC analysis, Lightcast data

Findings

- Job postings have grown across all AI exposure groups. By 2025, the lowest exposure quartile has around 22.5 postings for every posting in 2012, compared to 7.8 in the highest exposure quartile.
- All quartiles declined from 2022, before rebounding in 2025 to levels similar to those seen in 2022.
- Despite these fluctuations, the ordering remains consistent, with less AI-exposed occupations continuing to show stronger growth than more exposed roles.

However, the top quartile of AI exposed occupations account for the largest number of job postings

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



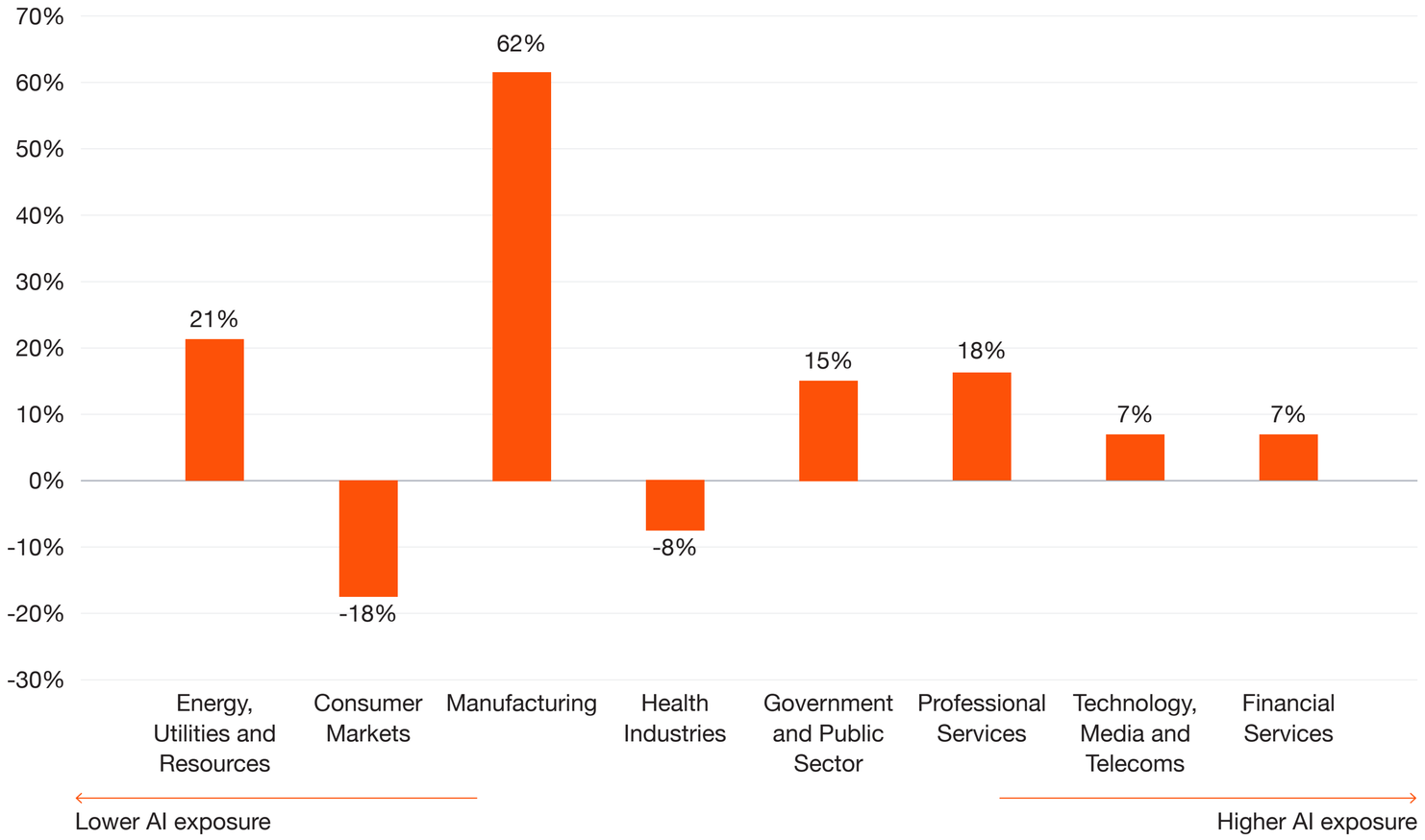
Source: PwC analysis, Lightcast data

Findings

- While job postings have grown faster in less AI-exposed occupations over the long term, highly exposed roles still account for the largest share in absolute terms.
- In 2025, the most AI-exposed quartile recorded around 128,000 job postings, higher than lower exposure groups.
- All quartiles saw an increase in job postings between 2024 and 2025. The largest increase was in the highest exposure quartile, which rose by around 51,000 postings.

AI wage premiums in New Zealand remain modest, indicating that the value placed on AI skills is still developing

Wage premium by sector, New Zealand, 2025



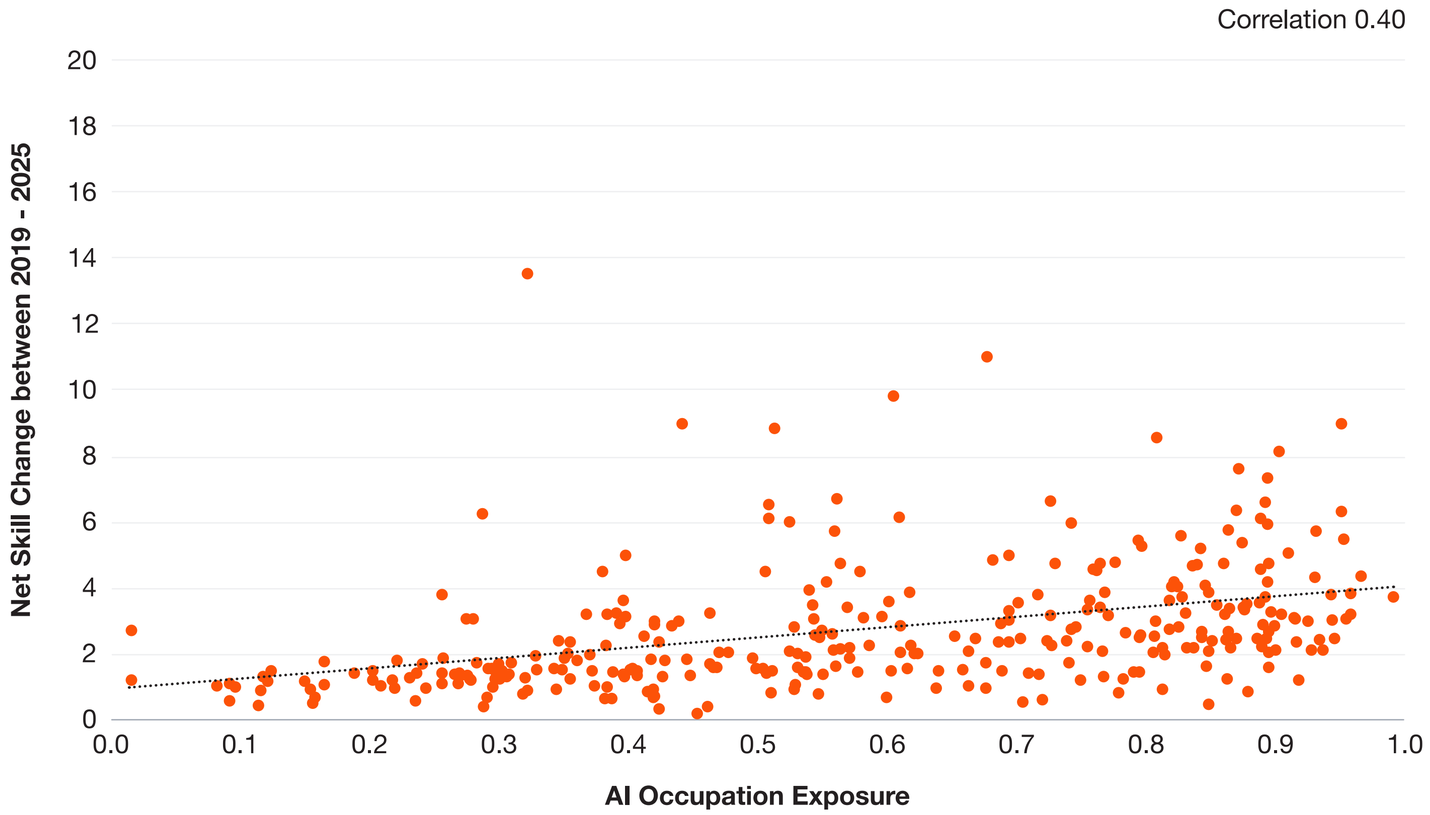
Source: PwC analysis, Lightcast data

Findings

- Wage premiums in New Zealand are relatively low across most sectors, suggesting that the full value of AI adoption has yet to be realised.
- Manufacturing stands out, with a higher premium of around 62%, pointing to pockets of high-value roles where AI capabilities are being effectively leveraged.
- In contrast, Consumer Markets and Health show negative premiums, indicating that AI-driven value has not yet translated into higher wages in these sectors.
- The available salary sample is too limited to robustly split New Zealand wage premiums between AI user and AI developer roles. However, globally in 2025, the AI wage premium for AI user roles was 66.6%, while the AI wage premium for AI developer roles was 103.3%, suggesting that advanced AI development capabilities command a materially higher premium than applied AI user capabilities.

In New Zealand, more AI-exposed occupations are experiencing faster rates of skills transformation

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



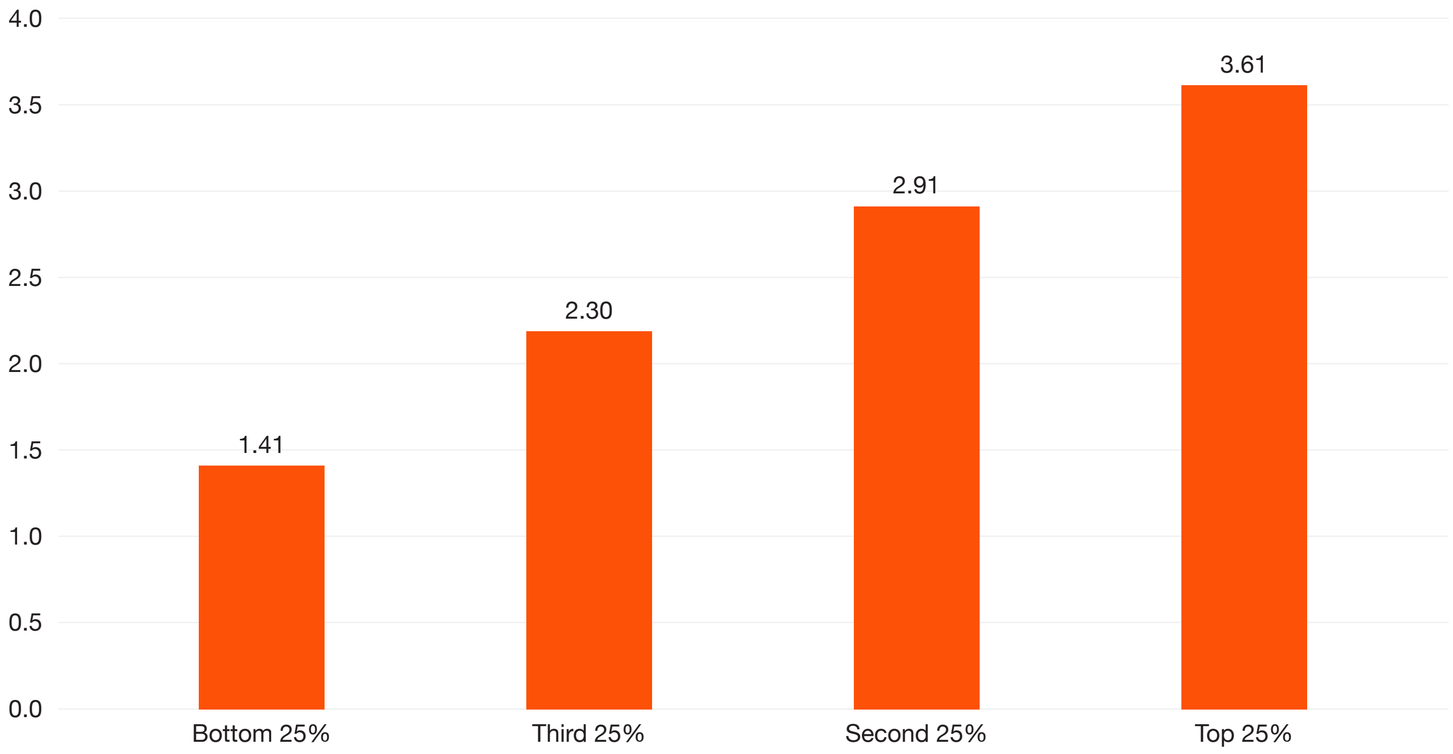
Source: PwC analysis, Lightcast data

Findings

- There is a positive correlation of 0.4 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 are adapting 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, New Zealand



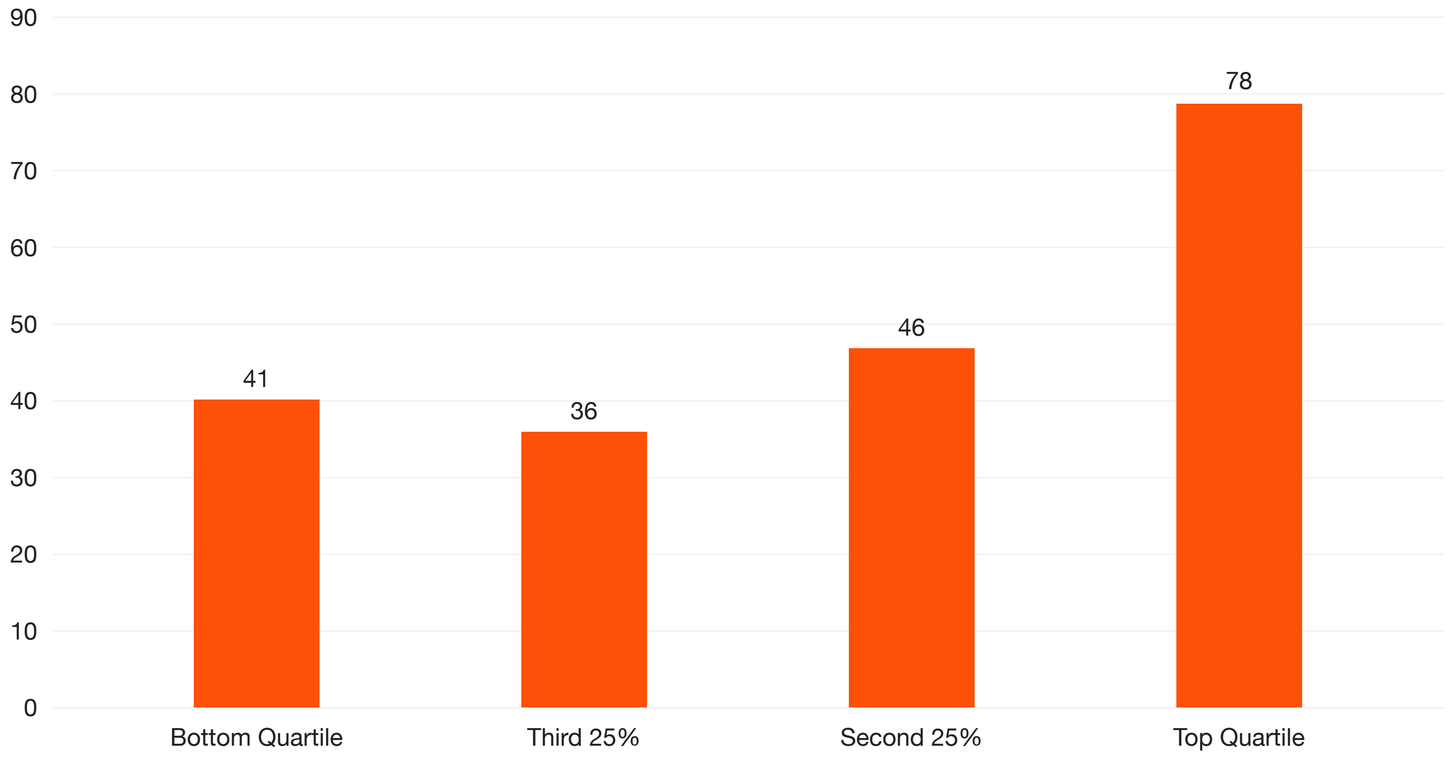
Source: PwC analysis, Lightcast data

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, and the top quartile seeing a significant jump from the lower quartiles.
- This reinforces the earlier finding of a strong positive relationship between AI exposure and skills change in New Zealand, 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, New Zealand, 2025 relative to 2019



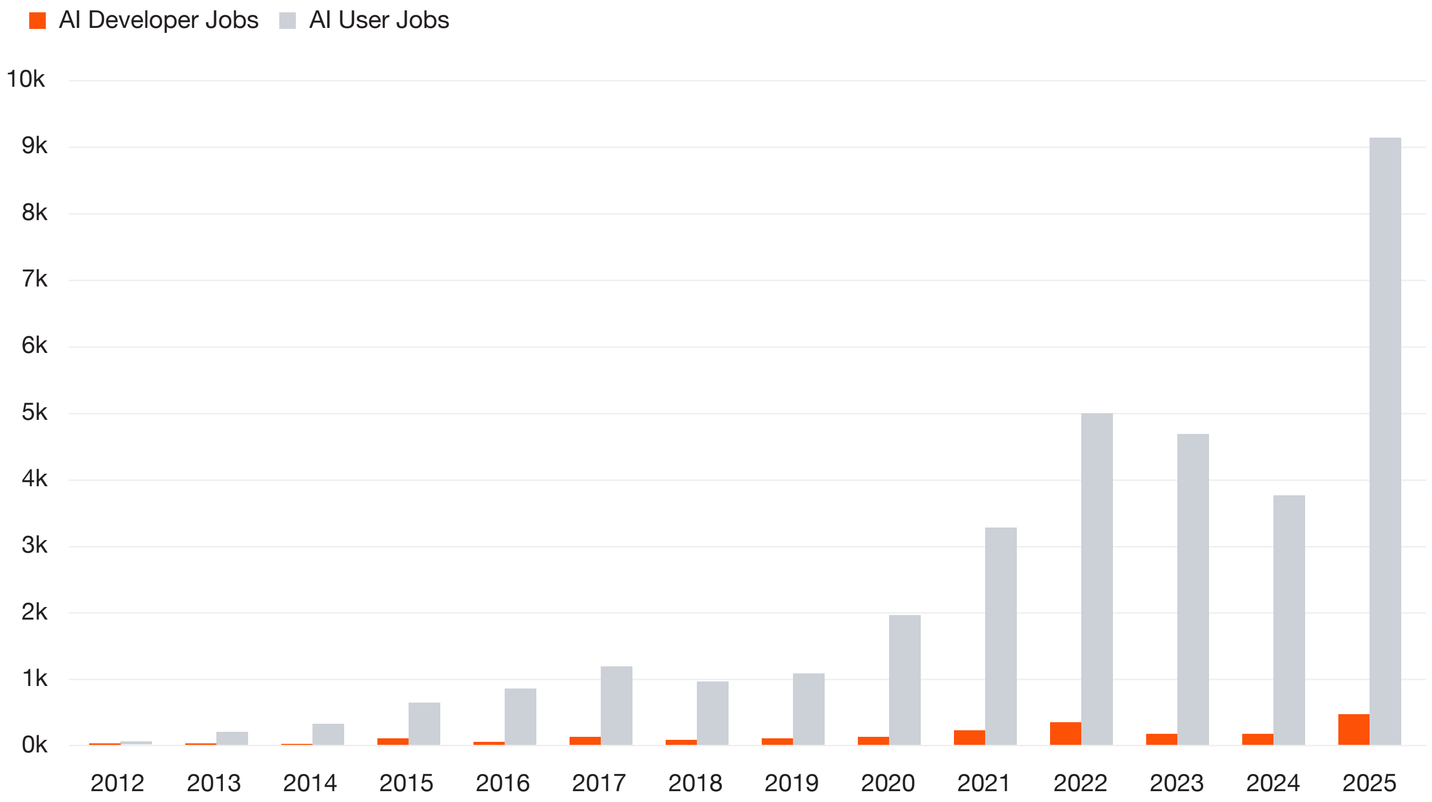
Source: PwC analysis, PwC AI Occupational Exposure Index, Lightcast data
Notes: We define a ‘new skill’ as any skill that has greater than 10 mentions in an occupation in 2025, but five or less mentions in that same occupation in 2019. Across all postings for an occupation in a given country, we count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

Findings

- We find a 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 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 pattern is not fully linear across all quartiles, higher exposure occupations show stronger skill expansion overall, with the top quartile averaging 78 new skills per occupation. This suggests that skill expansion is greatest among the most AI-exposed occupations.
- Some of this increase reflects higher posting volumes in more exposed occupations, however 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 New Zealand is dominated by user roles, with both user and developer roles returning to strong growth in 2025

Total number of AI user and AI developer job roles, New Zealand, 2012-2025



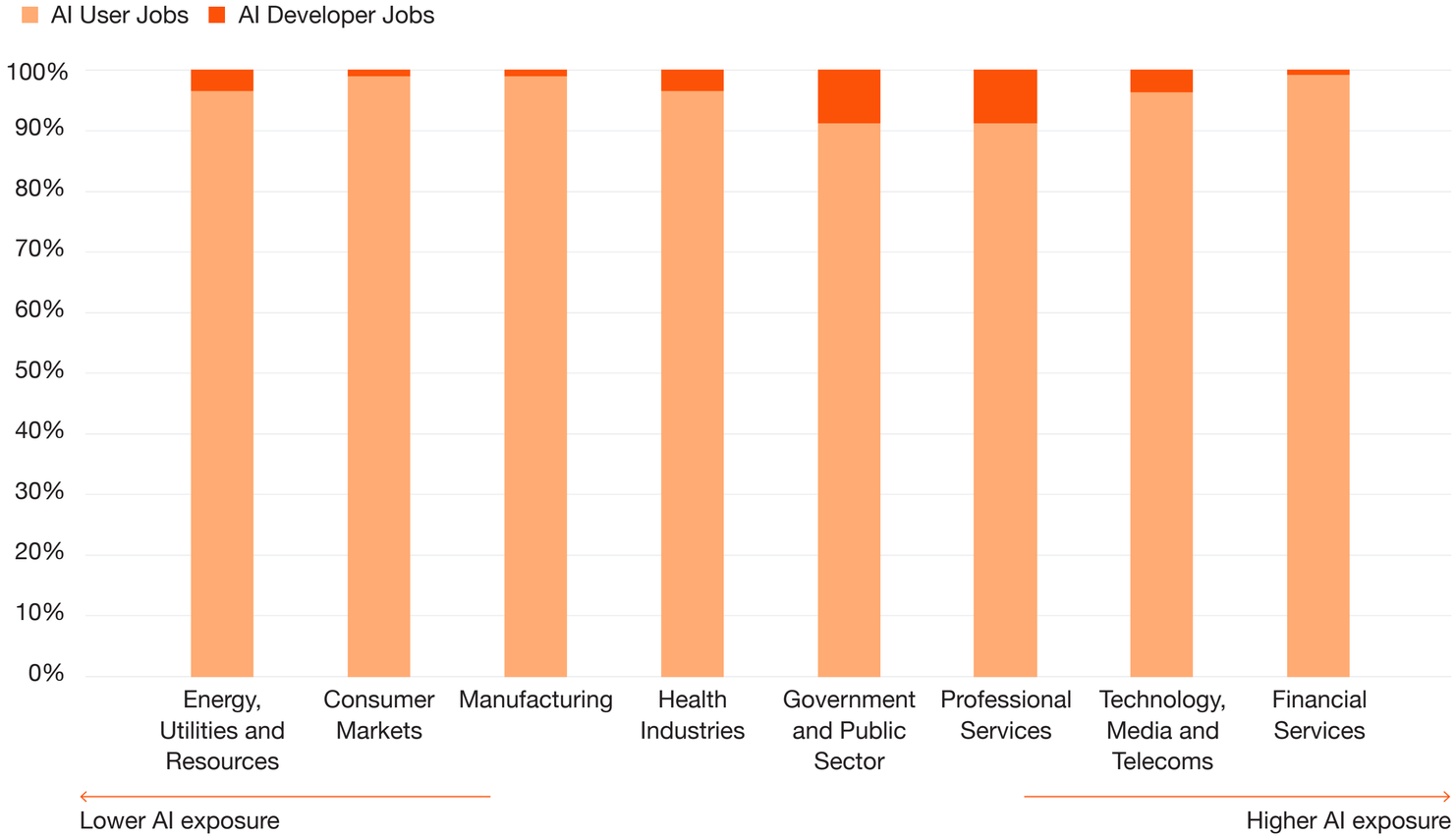
Source: PwC analysis, Lightcast data
Notes: AI user and AI developer job roles are determined as jobs requiring Tier 0 or 1 skills (AI literacy and applied AI skills) for AI user jobs and Tier 2 skills (advanced AI skills) for AI developer jobs. AI developer jobs are tagged as such if there are any skills 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 around **5.4k** roles in 2025 after declining in both 2023 and 2024.
- AI developer roles remain smaller in volume, but also increased in 2025, rising by around **309** roles after softer demand in the previous two years.
- Overall, this points to a strong rebound across both categories in 2025, with both AI user and developer roles **increasing sharply year on year,** indicating renewed expansion in both AI adoption and development capabilities.

Across sectors, AI job postings in New Zealand 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, New Zealand, 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.
- **Professional Services** shows the highest share of **AI developer** roles **(8.9%),** consistent with its role in developing and advancing AI technologies.
- **Consumer Markets, Manufacturing and Financial Services** record the highest share of **AI user** roles, all higher that **99%,** reflecting broad-based adoption of AI across operational roles rather than in-house development.

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