



Global Workforce Hopes and Fears Survey 2026 - Australian insights

Giving more, getting less

What Australian workers want back
from their employers





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Introduction

Australian workers are turning up with more energy than they did a year ago. In PwC's Global Workforce Hopes and Fears Survey 2026, pride in work, willingness to go above and beyond, and enthusiasm for the day ahead all rose among the 1,250 Australian respondents. On the face of it, that is an enviable position for employers.

Look at what those same workers say they are getting back, and the picture changes. Trust in leaders has fallen sharply, as has perceived access to learning and development.

Financial pressure has climbed for a third year, less than half say they are paid fairly, and few see innovation or effective use of AI being rewarded. In the mind of workers, the balance at the heart of work is tipping one way.

The risk is that employers mistake continued effort for sustainable performance. Goodwill is not infinite, and workers who keep giving without seeing enough back eventually give less. This is the reciprocity challenge at the heart of work: the commitment is there, but the opportunity for Australian employers lies in matching it.



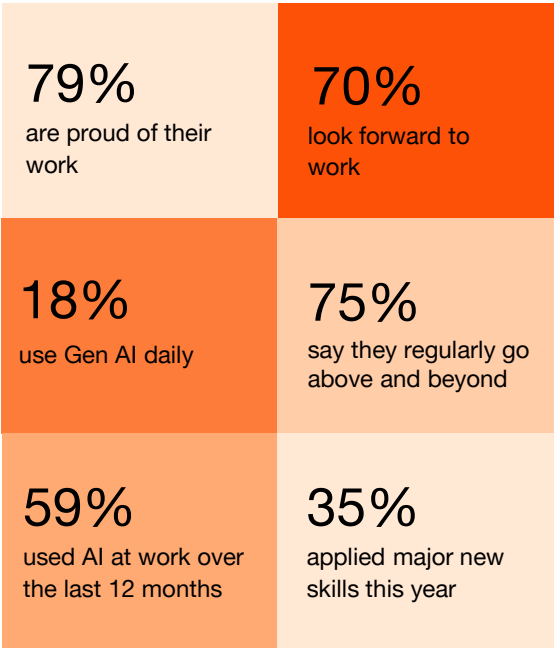
Motivation is rising amongst Australia's workers, but they report receiving less in return. For employers, the question is whether this imbalance can continue - or whether motivation will eventually be eroded by an unsustainable workload, declining development opportunities and falling trust in leadership."

Emma Hardy
Partner, Workforce, PwC Australia

The reciprocity scorecard



What workers are giving



What workers believe they are getting





Section 01

Motivation remains high, but trust in leaders has fallen sharply - it must be earned back

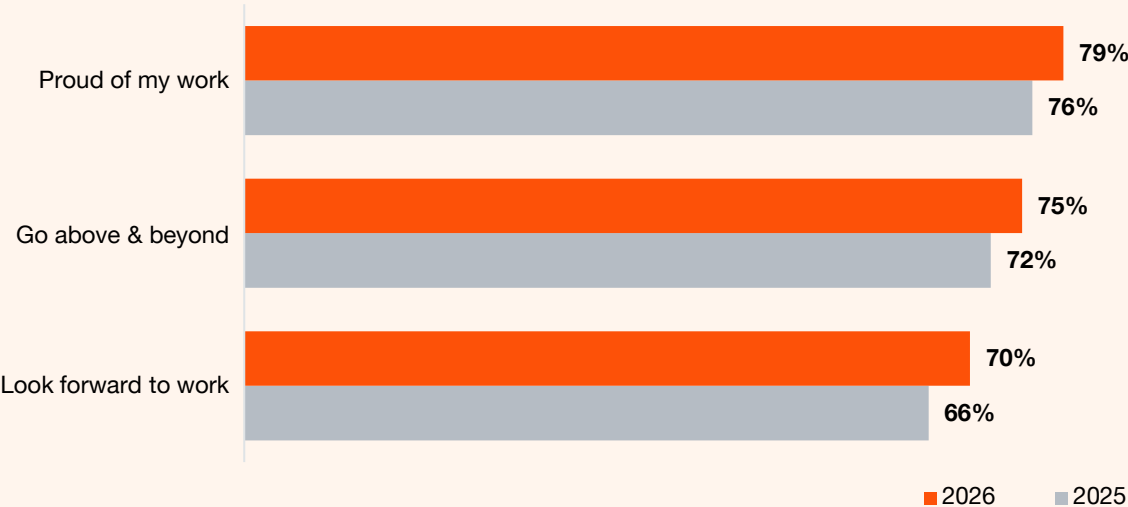
Australian workers continue to bring energy and positivity to work. Almost four in five (79%) are proud of what they do, while willingness to go 'above and beyond' and enthusiasm for work are not far behind. All three measures have risen over the past year. Job satisfaction is also solid at 65%, with fewer workers looking to change employer than last year.

That is a strong base for employers to build on. But beneath it sits a less comfortable finding: trust in management has fallen significantly. Just 41% of Australian workers trust senior management - down from 50% in 2025 - while only half trust their direct manager, down from 61% in 2025.

Both figures sit below global levels. The tension is hard to miss: workers remain present and engaged, but they feel less connected to the people leading them.

Motivation is rising in Australia

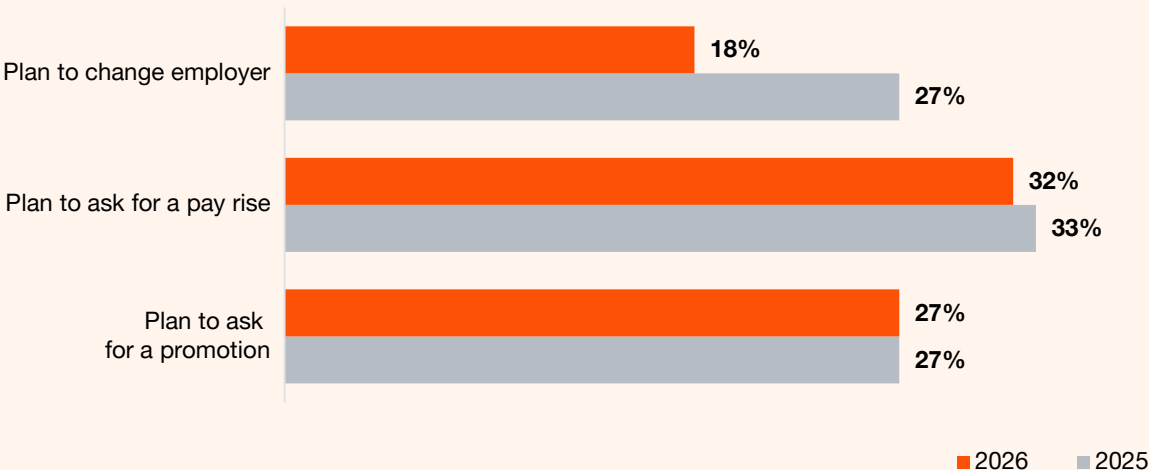
Q: How often do you have the following feelings about your job? (Showing at least once a week)



Source: PwC's Global Workforce Hopes and Fears Survey – 2026 & 2025

Fewer workers are looking to leave, but income pressure hasn't eased

Q: How likely are you to take the following actions within the next 12 months? (Showing 'very likely' or 'extremely likely')



Source: PwC's Global Workforce Hopes and Fears Survey – 2026 & 2025

Trust in Australian management has fallen sharply

Q: To what extent do you agree with the following: “I trust my manager / top management at my organisation” (Showing ‘strongly’ or ‘moderately agree’)



Source: PwC's Global Workforce Hopes and Fears Survey – 2026 & 2025

Why such a big drop in trust? The survey cannot identify a single cause, and the default explanation may be poor communication. But the data points to something deeper: much of the workforce may be experiencing the rapid transformation underway as something being done to them, rather than with them.

Only 28% of Australian workers feel optimistic about their organisation's future, six percentage points below the global average. The divide by seniority helps explain why. This year, 53% of senior executives learned new tools, compared with just 19% of non-managers. And while 23% of senior executives say innovation is rewarded where they work, only 8% of non-managers say the same.

Leaders may be asking people to innovate, experiment and adapt, while reward systems tell much of the workforce that the safest course is to comply, avoid mistakes and leave transformation to others.

If workers are not given meaningful opportunities to learn, contribute and shape change, it is harder for them to connect with the organisation's vision or believe they have a stake in its future.

Active involvement in transformation is more than a change-management technique; it is a way to build trust. When people can see how change affects their work, influence how it is implemented and share in the opportunities it creates, transformation becomes something they are part of - not simply something they are expected to absorb.

This drop in trust matters. Motivation is not an inexhaustible resource. While the survey cannot establish cause and effect, the findings suggest that falling motivation and trust may put retention at risk. Globally, the least motivated workers are 1.6 times as likely to say they plan to change employer as the most motivated and are more likely to report burnout.



Section 02

Workers are giving more but feel they're getting less - pay, workload and development are all under strain

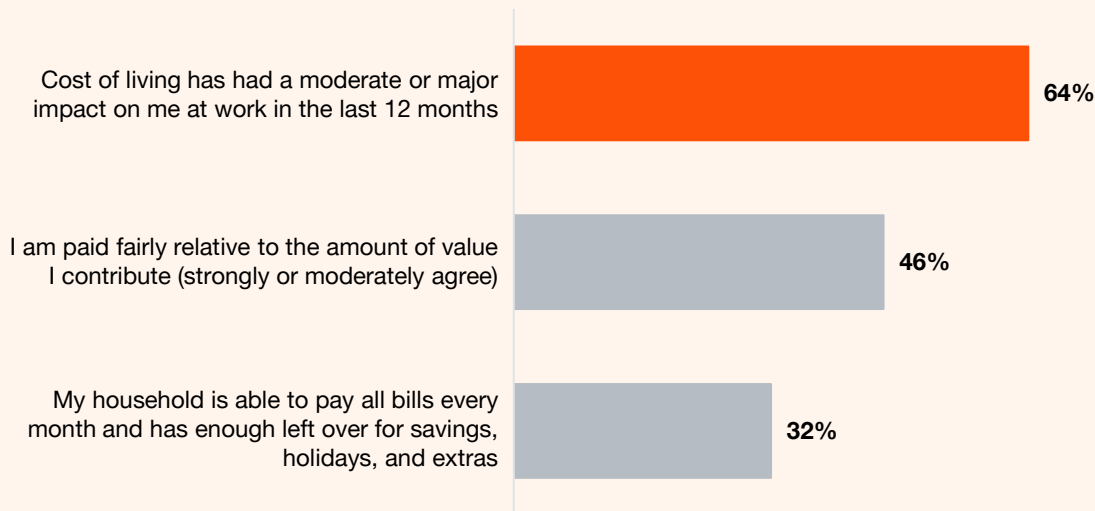
Trust is not the only pressure point – workers are also stretched financially, and the two may be connected.

Less than half believe they are fairly paid, and even fewer say they can pay their bills and have something left over at the end of the month. Almost two-thirds of all workers (64%) say the cost of living has had a moderate or major impact on them at work in the last year. When workers believe they are going above and beyond but do not feel appropriately rewarded, that imbalance can erode trust - particularly when cost-of-living pressures make the gap between effort and reward feel more acute.

Burnout is seen as the biggest drag on workers' productivity (31%), with workload and a lack of time closely behind. Meanwhile, a negative workplace culture is almost as much of a dealbreaker as low wages.

Taken together, these findings suggest that staying is not the same as thriving. In a tougher economic environment, fewer workers considering changing employer may reflect caution as much as contentment. Australian workers may be making the best of difficult conditions while still bringing pride and energy to their jobs.

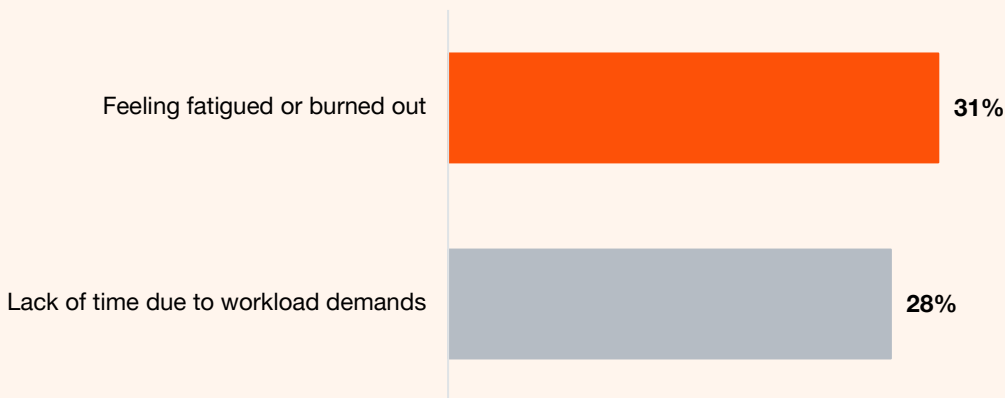
Workers don't believe effort is being matched by reward



Source: PwC's Global Workforce Hopes and Fears Survey – 2026 & 2025

Burnout is the biggest drag on productivity

Q: What limits your productivity at work the most? (Top 2 responses)



Source: PwC's Global Workforce Hopes and Fears Survey – 2026

There is a business-risk dimension to this picture as well. Safe Work Australia identifies job demands, poor support, and poor workplace relationships or interactions among common psychosocial hazards.¹ Those factors overlap closely with several of the pressures emerging in this year's survey and point to the need to move beyond a compliance mindset and address psychosocial risk through work design and systemic change.

And the consequences are becoming harder to ignore. Over the past decade, the rate of serious workers' compensation claims caused by mental stress has risen 123%, compared with 13% across all serious claims.² Mental-stress claims are also the most expensive and result in the longest periods away from work. This gives the burnout finding a sharper edge. Burnout is not simply a wellbeing problem. It can become a productivity, operational and workforce-risk problem too.

Against this backdrop, workers say they have less access to learning and development than they did a year ago (51%, down from 59%). The survey cannot tell us whether organisations are actually investing less, but workers feel less supported to develop at exactly the point when they are being asked to adapt to new technology and ways of working.

The message for employers is not that Australian workers have lost their motivation. They clearly have not. It is that employers should not take this motivation for granted. Today's relative workforce stability gives organisations a window to strengthen trust, ease the pressures that make work harder, and show employees that commitment still runs both ways.



As AI automates more tasks, roles are evolving faster than many organisations are supporting. Leaders need to define clearly what people own and what AI agents own - or risk increasing burnout and operational risk.”

Emma Linnenbank

Partner, Workforce, PwC Australia

Where to focus

- **Give workers reasons to trust what leaders say.** Trust is rebuilt through evidence, not another message about trust. Start with what employees already say isn't working. Choose two or three recurring pain points and fix them visibly. If workload boundaries are routinely ignored, change how work is allocated. If leaders call for experimentation while performance systems punish failure, change the system.
- **Protect the learning that change depends on.** Falling access to development is particularly difficult to square with ambitious transformation agendas. If a business is asking people to use AI and work differently, or move into new roles, the learning required to make that happen is critical. Align development with how roles are changing: combine AI capability with role-specific learning and give recognised proof of what they have gained through qualifications or internal credentials. Where existing learning models may need to move faster, partnerships with universities and other providers can help accelerate.
- **Make the employment deal work harder to ease financial pressure.** Employers cannot solve cost-of-living pressures, but they can reduce how hard those pressures land on workers. Reviewing benefits through a cost-of-living lens, such as transport, meals, childcare or healthcare, may carry more value than rarely used perks. So can greater control over work. For one worker, that may mean a predictable roster and income; for another, the ability to swap shifts easily. The answer will differ from person to person, but the principle is the same: give workers the flexibility and autonomy they value.

1. <https://www.safeworkaustralia.gov.au/safety-topic/managing-health-and-safety/mental-health/psychosocial-hazards?>
2. <https://www.safeworkaustralia.gov.au/media-centre/evidence-matters/2025/behind-numbers-whats-causing-harm-work?>



Section 03

Australia's AI adoption is increasing - the bigger prize is turning use into value

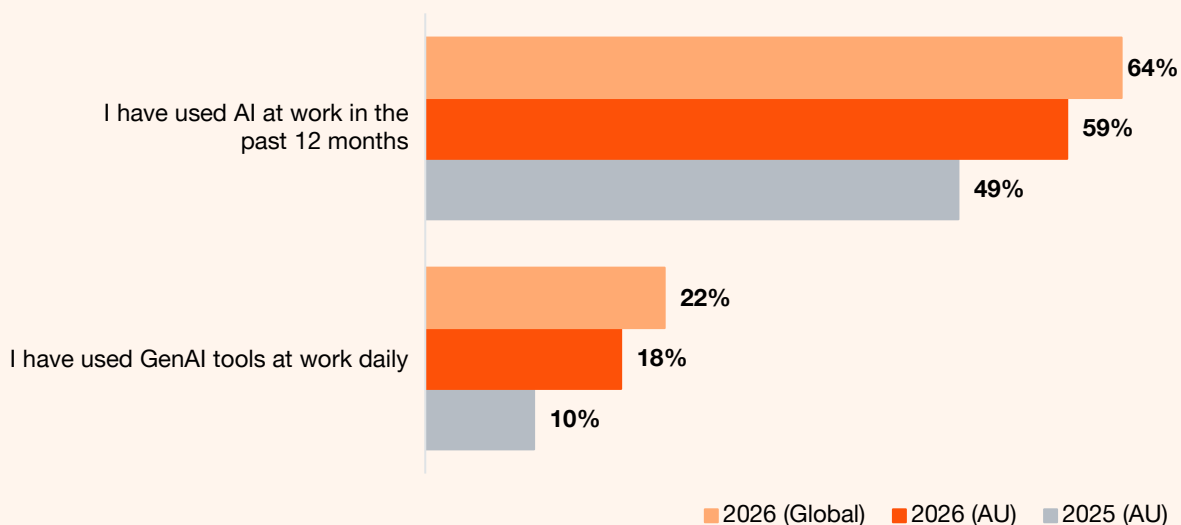
AI use is accelerating in Australia: 59% of workers used it at work in the past year, up from 49% in 2025 and approaching the global figure of 64%; 53% expect to increase their use over the next year. Yet use remains uneven: four in ten workers have not used AI at work, only 18% use generative AI daily, and adoption ranges from 91% of senior executives to 39% of non-managers. Women are also more likely than men to feel fearful about AI at work, at 20% versus 14%.

AI adoption marks the beginning of a broader transformation journey for organisations, setting the foundation for unlocking value and driving innovation. As AI becomes more deeply integrated into work and workflows, it enables businesses to enhance efficiency, effectiveness and growth. From there, organisations have the potential to harness AI to create new enterprise value and fundamentally reimagine their business models and growth.

In Australia, the opportunity lies in moving beyond initial adoption: our [2026 AI performance study](#) identified that currently, only 7% of enterprises have redesigned workflows to enable repeatable AI deployment, compared with 56% of leading AI organisations, highlighting significant room for growth in capturing AI's full potential.

Where AI is being used, the benefits are becoming clearer: users report better-quality work, greater creativity and a stronger sense of the value they bring. Daily AI users are also more motivated, more confident about their job security and more likely to be seeking promotion than Australian workers overall. The opportunity is to extend these gains beyond today's uneven pattern of use.

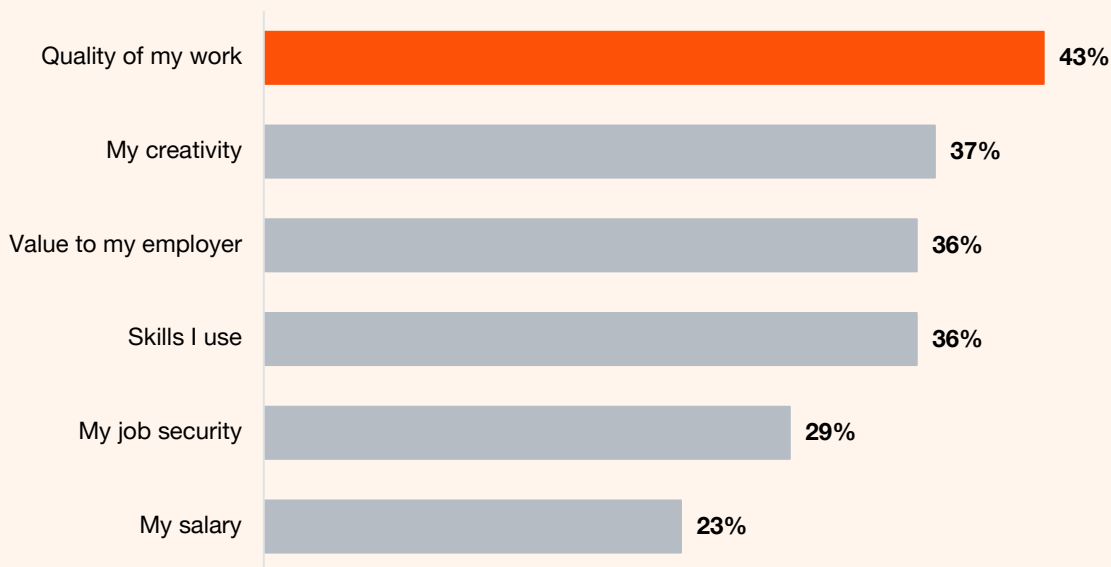
AI use is accelerating in Australia – but work to be done



Source: PwC's Global Workforce Hopes and Fears Survey – 2026 & 2025

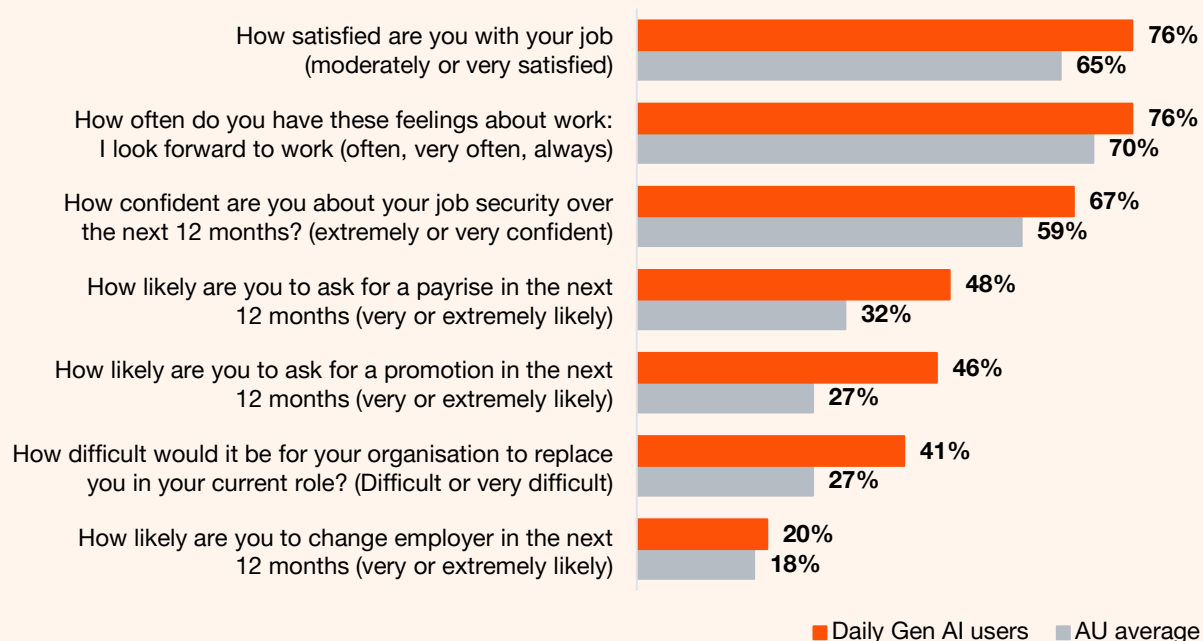
AI is delivering more tangible benefits

In the last 12 months, to what extent did AI increase following aspects of your job? (Among workers who use AI, share saying AI moderately or significantly increased each over the last 12 months)



Source: PwC's Global Workforce Hopes and Fears Survey – 2026

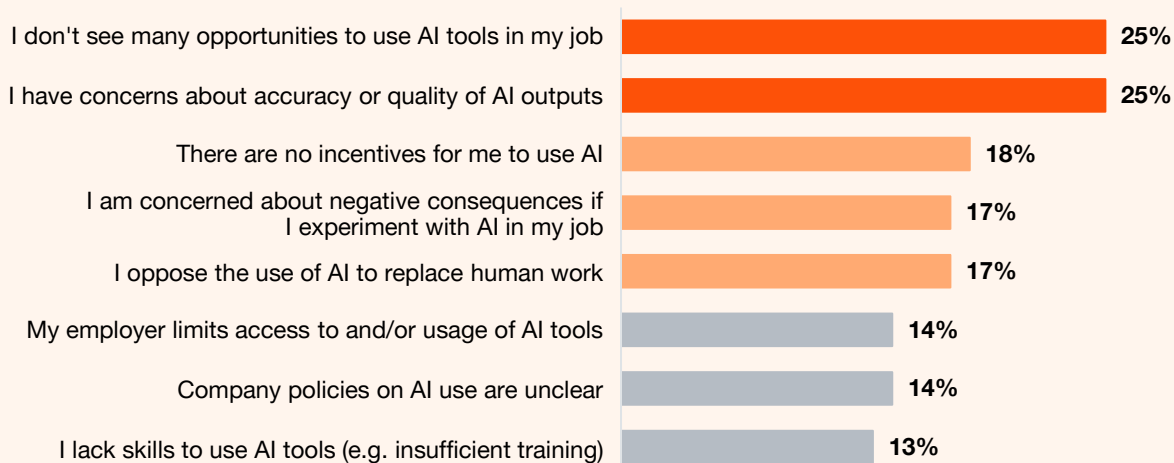
AI users are pulling ahead - more motivated, more secure, and more likely to be looking



Source: PwC's Global Workforce Hopes and Fears Survey – 2026

The biggest barriers to greater AI use

Q: What are the biggest barriers preventing you from making more use of AI in your work?



Source: PwC's Global Workforce Hopes and Fears Survey – 2026

AI capability is becoming career capital

These benefits are also shaping workers' career choices: AI users are twice as likely as non-users to be considering changing employer, at 23% versus 11%.

AI is starting to look like career capital. Our [2026 Global AI Jobs Barometer](#), reinforces that picture: workers with AI skills now command a 62% wage premium on average, up from 57% a year earlier.

But that progress is not being shared evenly across the workforce. Negative sentiment is concentrated among groups with lower use, particularly non-managers and people in frontline, customer-facing roles. Women also appear less well positioned to benefit, reinforcing the need to examine who is being given meaningful opportunities to use AI.

The risk is a two-tier workforce: one group gaining skills, confidence, and career advantage through AI, while another has fewer chances to participate. This is a pattern we are seeing emerge across our research on work and AI.

Workers report barriers to AI use. Skills and access to tools are not the main constraints: lack of opportunity to use AI and concerns about accuracy and quality (both at 25%) now rank higher. Lack of incentive follows at 18%, while outright opposition and fear of the consequences of experimenting are close behind. There's disparity in who gets rewarded too. Only 7% of non-managers say using AI well is rewarded, vs 22% of senior executives. Instead, non-managers are about twice as likely to say that following the rules and avoiding mistakes are rewarded.

In other words, the next constraint on adoption may increasingly come from workers' environment rather than their individual capabilities. Work design, opportunity, incentives, trust, and permission all matter.



If AI capability makes these workers more valuable externally, part of the answer is to give them more mobility internally - more projects, progression, and reward - before the market does.”

Peter Wheeler

Managing Director, Advisory People,
Workforce & Change, PwC Australia

Tokenomics

When human work is the better investment

AI's economics may change how organisations value human work. As AI use scales, so does the volume - and cost - of the tokens that power it. That means organisations will need a clearer view of what each AI-enabled workflow costs and what it creates in return.

Our survey shows strong enthusiasm for AI, but the goal should not be AI use for its own sake. Comparing the full cost and value of human, AI and combined approaches can help leaders identify where technology genuinely improves outcomes - and where human judgement, context and relationships remain the better investment.

[Read more](#)



Where to focus

- **Finish adoption, then move the goal posts to value.** Track who is still outside AI use - non-managers, frontline and manual roles, and groups reporting lower confidence - and treat access, permission and opportunity as the fix, not more training alone. At the same time, stop measuring progress by usage. Set the measures that matter for phase two: which workflows have been redesigned, what time or cost has been released, what quality has improved, and what that is worth. Usage tells you people have the tools. Only redesigned work tells you the value has landed.
- **Give AI-capable workers somewhere to grow.** If AI capability makes these workers more valuable externally, part of the answer is to give them more mobility internally - more projects, progression, and reward - before the market does. Capitalise on their appetite to grow by creating purposeful sideways moves that let them apply their capabilities to new functions, operations, or problems - and give them a role in bringing the wider workforce with them.
- **Redesign the work around AI.** Stacking AI-enabled change on top of unchanged roles and workloads can add to the overload AI is meant to relieve. Rework workflows so workers have genuine opportunities to use AI where it adds value - deciding what AI should remove, what people should continue to own, and where a combination works best. Be careful not to automate away every simple task: a day made entirely of high-cognitive-load work risks adding to the burnout already weighing on productivity. Back this new way of working with visible incentives and psychological safety, so people know they can test, learn, and adjust without being punished for a misstep.

56%

of AI leaders - the top performing companies in Australia - had redesigned workflows to incorporate AI, vs 7% of Australian enterprises overall.

[AI Performance Survey - Australian insights](#)



Section 04

Managers are carrying the weight of change - it's time for radical role redesign

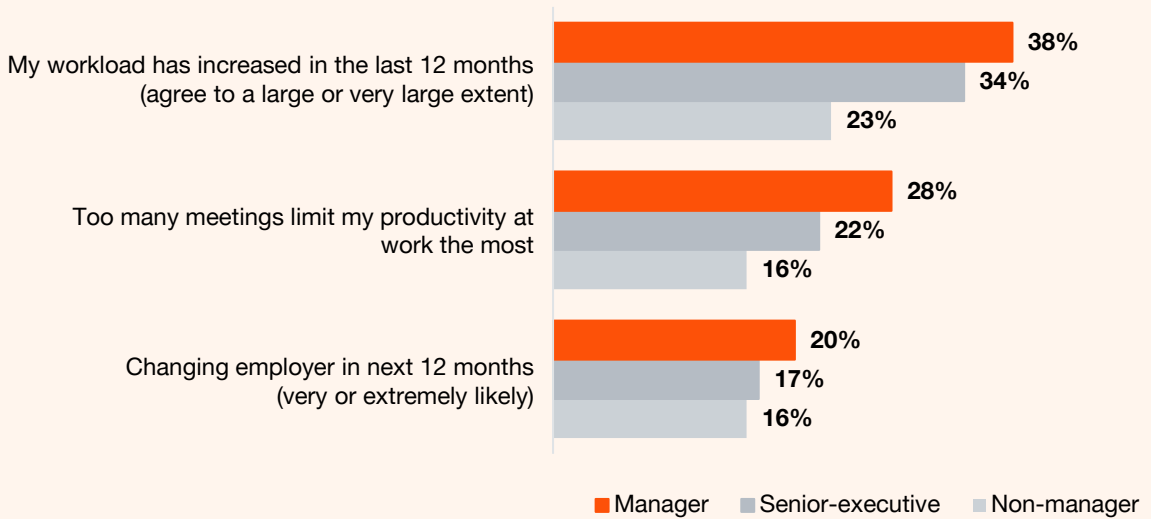
Middle management has become a pressure cooker. More than a third (38%) say their workload has increased substantially - more than senior executives or non-managers. They are also the group most likely to say meetings and interruptions are getting in the way of productivity (28%), and the most likely to be considering leaving (20%).

Managers are often the linchpin of an organisation. They translate strategy, priorities, and expectations into people's daily experience. This can expose them to friction from change and pressure from both above and below. When their capacity is squeezed, it may leave less time to coach, listen, and respond - all of which can shape whether employees feel supported, whether change lands well, and whether problems surface early. The drop in trust in direct managers this year may be symptomatic of a role under too much strain.

The consequences can extend beyond wellbeing and productivity. Managers often sit inside the organisation's control environment: overseeing work quality, approving decisions, monitoring conduct, recording time and escalating concerns.

When sustained workload and cognitive pressure reduce their capacity, warning signs may be missed, oversight may weaken and employees may be less willing - or able - to raise issues. In some workplaces, pressure to meet budgets or performance targets can also contribute to unrecorded working time, creating wage-compliance exposure as well as deeper distrust. Burnout should therefore be treated not only as a people risk, but as a potential operational, conduct and compliance risk.

Workload and interruptions are squeezing managers most



Source: PwC's Global Workforce Hopes and Fears Survey – 2026

Where to focus

- Treat manager burnout as a control-environment warning sign.** Do not rely on individual resilience or wellbeing programs alone. Monitor trends in excessive hours, unrecorded time, sick leave, turnover, missed reviews, control failures and delayed escalations - particularly where several indicators persist together. Investigate the underlying work design, incentives and management practices, and remove pressures that discourage accurate reporting or timely escalation.
- Put middle managers at the centre of AI-enabled work redesign.** Give them licence to identify what work should stop, what AI can take on and what can move elsewhere - not simply implement decisions made above them. Use AI to remove administrative, coordination and reporting work where it genuinely releases capacity, while protecting the people leadership, judgement and governance responsibilities that build trust.



Managers sit where workload, trust and change converge. The role is stretched, but redesigned well, it could become a powerhouse for AI-enabled innovation - connecting technology to strategy and leading change.”

Amy Plowman

Partner, Advisory People,
Workforce & Change,
PwC Australia

“

Redesign early-career experiences to build the strategic judgement, communication and leadership skills needed in an AI-enabled workplace.”

Peter Wheeler

Managing Director, Advisory People, Workforce & Change, PwC Australia



Section 05

Spotlight

Build a new employee proposition for early-career talent

As AI takes on routine entry-level tasks, early-career workers may increasingly be expected to exercise judgement and take on more complex work much sooner. Our [2026 Global AI Jobs Barometer](#) points to just how quickly that shift is happening: AI-exposed junior roles are seven times more likely to require skills traditionally associated with more senior roles.

But those routine tasks traditionally helped graduates build foundational skills, absorb context, and observe how experienced colleagues exercise judgement. If organisations remove them without redesigning learning and career pathways, they risk weakening how knowledge is passed on and ultimately the pipeline of future talent.

The opportunity is to offer a more compelling early-career bargain: accelerated responsibility, supported by stronger human development, and richer career experiences.

Rebuild the early-career EVP around growth, connection, and opportunity:

- **Involve early-career workers** in cross-functional teams that apply AI to real business problems. Let them help redesign work and contribute to the organisation's future from the beginning.
- **Actively curate careers beyond the first role.** Create deliberate pathways into different functions, projects and specialisms so early-career workers can build breadth over time rather than depend on a traditional vertical promotion ladder.
- **Rebuild an apprenticeship-style model around sustained human connection.** Provide named mentors, structured feedback, and exposure to experienced colleagues. Help them feel seen, understand their value and purpose, and trust that the organisation is genuinely invested in their development and future.
- **Make investment in capability visible.** Offer relevant advanced tech tools, structured development, and recognised credentials that employees can connect to future roles and progression.



Section 06

Conclusion

Motivation is high. Reciprocity will determine whether it lasts

Employers that want workers to remain motivated and adaptable must hold up their side of the bargain. That commitment cannot be taken for granted while trust falls, learning and development becomes harder to access, workloads keep building, and AI drives change at an unprecedented pace and scale.

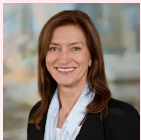
The leadership challenge is therefore one of reciprocity:

- If workers are expected to adapt, give them the learning, opportunity, and clarity to do it.
- If they are expected to trust, give managers the capacity to lead well.
- If they are expected to sustain performance, address the workload, reward and work-design making that harder.

- If they are expected to innovate, give them permission to try, learn, and occasionally get it wrong.
- If AI is expected to create value, make sure access to its opportunities-and the careers they can create-extends beyond those already closest to it.

Motivation is an asset like any other: it compounds when it is invested in and depletes when it's not. Australian employers still have it in reserve, and what they do with it will shape whether workers continue to bring the same energy, adaptability and commitment to work.

Contributors



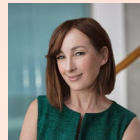
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About the survey

PwC's Global Workforce Hopes and Fears Survey 2026 gathered responses from 49,364 workers across 48 countries and regions, including 1,250 from Australia, and 29 industry sectors in May and June 2026. The figures in this report are weighted proportionally to the working population's gender and age distribution in each country or region, ensuring workers' views are broadly representative across all major geographies.

To analyse worker motivation, we asked workers how often they feel proud of the work they do, are willing to go above and beyond what is required in their role and look forward to going to work. We used factor analysis to combine their responses into a motivation index, indicating their overall level of motivation at work. Workers were then grouped based on the global distribution of scores, with the top quartile classified as highly motivated and the bottom quartile classified as low motivation. This uses the same methodology as the 2025 motivation index.