pwc

Africa Workforce

PwC Hopes and Fears Survey 2026

The Workforce Reinvention Matrix

How AI advantage and labour market demand are reshaping work in Africa



Contents

04 Africa's workforce is leaning into change

07 African workers are well positioned for an AI-enabled future

11 Turning AI adoption into meaningful value

14 AI opportunities vary across industries

19 Turn trust and management capability into an execution advantage

21 Make reinvention inclusive and economically meaningful



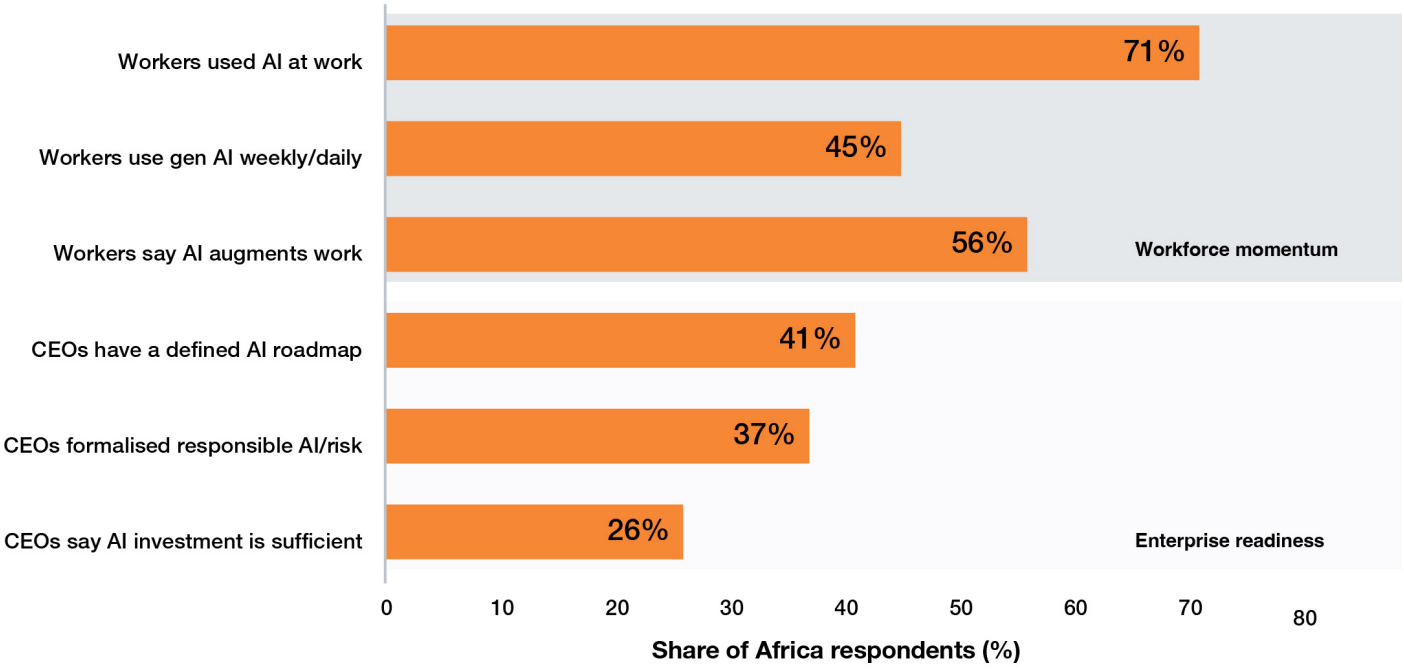
There is a shift happening across Africa's workforce. Workers are embracing change, building new skills, and taking a more active role in shaping how their jobs evolve.

We surveyed 1,733 workers across Algeria, Kenya, Morocco, Nigeria, and South Africa, and found a workforce that is not simply responding to change but increasingly embracing the opportunities it brings. This is clear in the growing use of AI across the continent: 71% used AI at work in the past year and, among those using it, 56% say it is augmenting their work. Workers are adopting it, building the skills to apply it, and using it in work that matters.

But individual adoption is only one part of the equation. The greater opportunity lies in translating that willingness to engage, learn, and experiment into value at an organisational level.

This is where an important tension begins to emerge. While workers are already putting AI to use, the findings from Africa's CEOs suggest that many organisations are still building the foundations needed to support its adoption at scale. Only 41% of CEOs say their organisation has a clearly defined AI roadmap, 37% have formalised responsible AI and risk processes, and 26% believe current investment is sufficient to deliver their AI goals.

Workers are moving faster than enterprise AI systems



Source: PwC Africa Workforce Hopes and Fears 2026 data and the 2026 PwC 29th Global CEO Survey: Africa perspective.

It is at this intersection between workforce momentum and organisational readiness that the picture becomes more complex. Across the findings, different experiences of skills, trust, technology, and change begin to emerge.

01

Africa's workforce is leaning into change



The results offer a distinctive source of optimism: Africa's workforce is already leaning into change.

More than 8 in 10 African workers say that, at least weekly, they are proud of the work they do, willing to go above and beyond what is required, and look forward to going to work. These results exceed the comparable findings across the global sample.

That sense of motivation is reinforced by relatively high levels of trust. Around 66% of African workers trust their direct manager and 55% trust top management, compared with approximately 52% and 45% respectively across the full global survey sample.

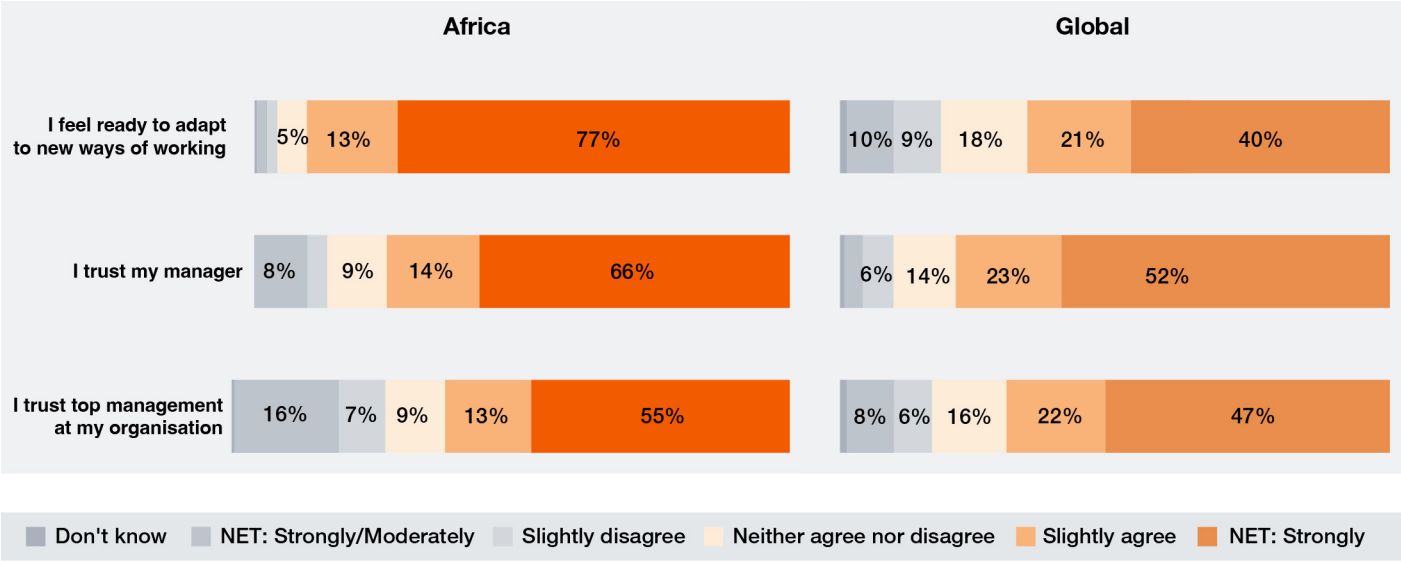
Together with autonomy, these findings point to a strong foundation for people to contribute, experiment, and respond to change. When people believe in their contribution, trust those leading them, and have room to exercise judgement, they are better positioned to test new approaches, learn from failure, and adapt as technology advances.

African workers report strong motivation and a favourable trust base

8 in 10

- Look forward to work
- Are proud of their work
- Go above and beyond in their work

To what extent do you agree or disagree with the following statements?



Source: PwC Africa Workforce Hopes and Fears Survey 2026. Comparative figures use the same survey measures.

The leadership task is to invest in this reservoir of energy.

Trust can accelerate change, but it can also be depleted if technology is introduced without transparency, consultation or a credible account of how workers will benefit.

African organisations can strengthen this foundation by involving employees in redesign, giving managers the authority to translate strategy into practical change and making the gains from reinvention visible.



02

African workers are well positioned for an AI-enabled future



African markets have a larger share of workers in the two high-AI-opportunity worker profiles than the full global survey sample, underscoring their potential to thrive in an AI-enabled future.

These profiles capture more than technology adoption alone.

They reflect the combination of workers' confidence in their career prospects and the benefits they are already realising from AI, including improved quality, greater creativity, enhanced skills, and increased value.

The findings point to a workforce with significant momentum, while highlighting the important role organisations can play in helping more people unlock these opportunities.

Four worker archetypes emerge, defined by labour market pressure and AI advantage

	Low labour market pressure	High labour market pressure
High AI advantage	**AI insurgents** Unexpected beneficiaries challenging assumptions about where value sits **Profile:** Workers outside traditionally scarce roles who are nevertheless gaining strong advantage from AI. They challenge assumptions about where future value will come from. **Employer implication:** Spot their potential early and create opportunities for them to grow into higher-value roles.	**Superstars** Scarce talent amplified by AI **Profile:** Workers combining scarce capabilities with strong AI advantage. They are confident, ambitious and increasingly valuable, but also the most likely to expect progression or look elsewhere. **Employer implication:** Retain them through visible progression, autonomy and a role in shaping AI-enabled work.
Low AI advantage	**The engine room** Limited labour-market leverage and limited AI advantage **Profile:** Workers outside the highest-pressure roles who are seeing little or no AI advantage. They are less connected to learning, innovation and future opportunity, making inclusion the central challenge. **Employer implication:** Make AI relevant to everyday work and create credible pathways to build confidence and skills.	**The indispensables** Scarce expertise still protecting their position despite limited AI advantage **Profile:** Workers in the highest-pressure labour-market roles who are seeing limited or no advantage from AI. Their skills remain difficult to source or replace, but AI is not yet amplifying their effectiveness. **Employer implication:** Protect critical expertise while creating role-specific opportunities for these workers to gain value from AI.

Superstars can help design the next operating model

22%

of surveyed African workers combine strong AI advantage with high perceived demand for their capabilities.

Superstars represent 22% of surveyed African workers. They combine strong AI advantage with high perceived demand for their capabilities. They are more likely than the Africa average to be senior executives, to work in research and development, and to be employed in larger organisations.

Their value extends beyond personal productivity. Organisations can make superstars co-designers of AI-enabled work, giving them visible ownership of priority use cases, clear decision rights, and responsibility for spreading lessons across functions and markets.

AI insurgents are a pipeline of emerging value

31%

of the Africa sample are embracing AI and reporting meaningful benefits.

AI insurgents make up 31% of the Africa sample, a notably larger share than in the full global survey. They are embracing AI and reporting meaningful benefits, even though they perceive less leverage in the labour market. Women modestly over-index in this group, as do workers in sales and marketing, other professional roles, and private equity, real assets, and sovereign investment funds.

Africa's opportunity is to convert this energy into recognised capability. Clear skills credentials, stretch assignments, internal mobility, and reward for effective AI-enabled contribution can help these workers become the continent's next generation of high-value talent.

The engine room is the platform for scale

36%

of African workers are in engine room roles, making them the single largest workforce segment.

The engine room remains the largest single archetype, at 36% of African workers. It includes many customer-facing, public-facing, non-management, and consumer-market roles. These workers are essential to service delivery and operational continuity. Their participation will determine whether AI advantage remains concentrated or becomes an organisation-wide capability.

For this group, practical relevance matters more than generic training. Employers should identify where AI can remove friction, improve customer service, strengthen decisions, or release capacity for higher-value human contribution. Learning should be built into work, supported by managers, and connected to real tasks.

The indispensables can multiply scarce expertise

12%

of the sample are more likely to work in business strategy, skilled trades, and health industries.

Africa's indispensables account for 12% of the sample. They are more likely to work in business strategy, skilled trades, and health industries, and senior executives also over-index in this group. Their domain knowledge is difficult to replace and can be amplified through carefully targeted AI use.

Peer learning, role-specific experimentation, and knowledge-transfer tools can help these workers improve decisions, extend expert capacity, and preserve institutional knowledge, while keeping accountability with people.

> "The profiles are not fixed identities. Access, work design, learning, trust, and reward can change the advantage workers are able to build.



03

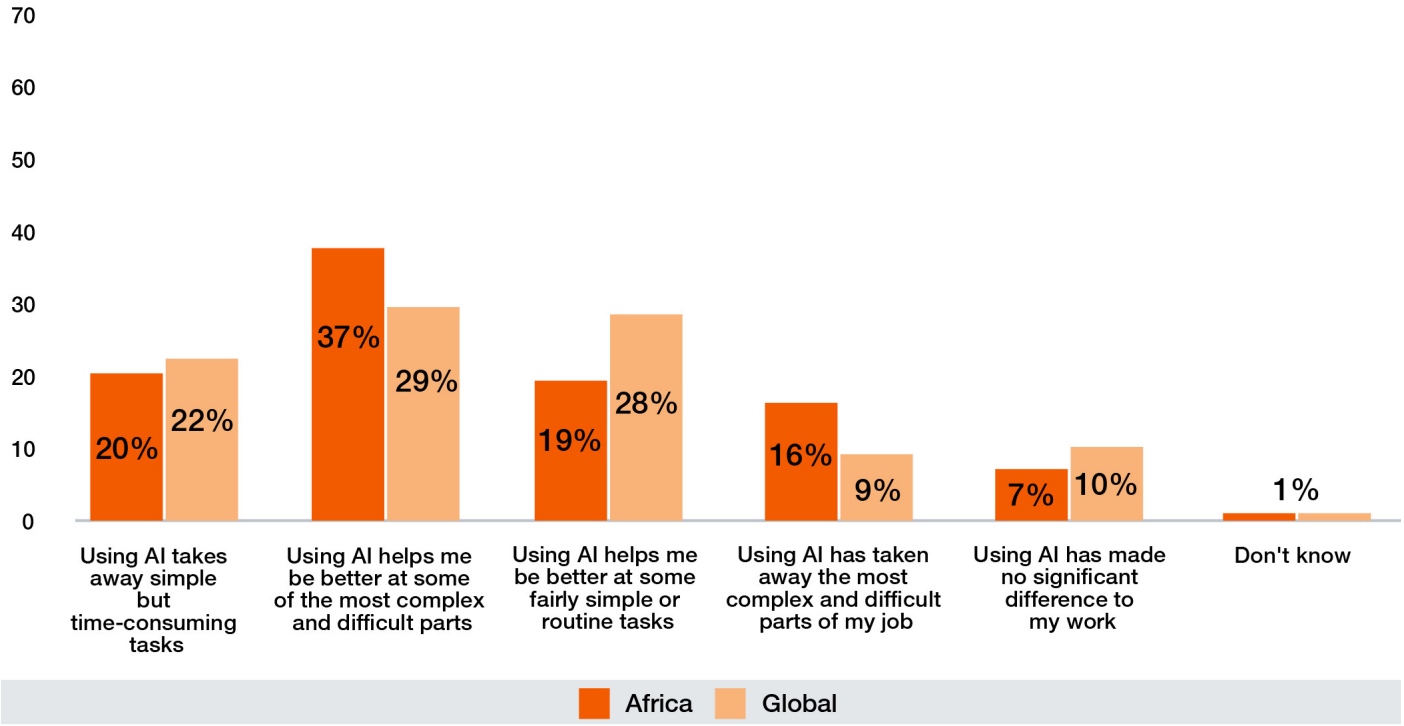
Turning AI adoption into meaningful value



AI use is already widespread across the Africa sample, but the way people are using it is equally significant. Among AI users, 37% say AI helps them perform some of the most complex and difficult parts of their jobs better, compared with approximately 29% across the broader sample. A further 20% say it takes on simple but time-consuming tasks, allowing them to focus on more complex activities, while 19% say it improves routine tasks.

These findings suggest that AI is increasingly augmenting what people can do, rather than simply automating individual tasks. For African organisations, this creates opportunities to extend expertise, strengthen decision-making, and create greater capacity for innovation.

Africa AI users are applying AI to more demanding work



But widespread adoption does not, on its own, translate into value. The organisational environment in which AI is used matters too: how roles and workflows are designed, how people are encouraged to experiment and learn, and how technology is integrated into decision-making.

Global evidence[1] reinforces this. The top 20% of companies capture 74% of AI-driven returns. These organisations are 1.9 times as likely to create incentives for experimentation, 1.7 times as likely to provide ongoing role-based learning, and 2.2 times as likely to redesign workflows around AI. The most AI-fit companies achieve 7.2 times higher AI-driven performance.

1 https://www.pwc.com/gx/en/news-room/press-releases/2026/pwc-2026-ai-performance-study.html

The firms capturing more AI value change the system around the technology

Global evidence: the top 20% capture 74% of AI-driven returns and achieve 7.2x higher AI-driven performance.

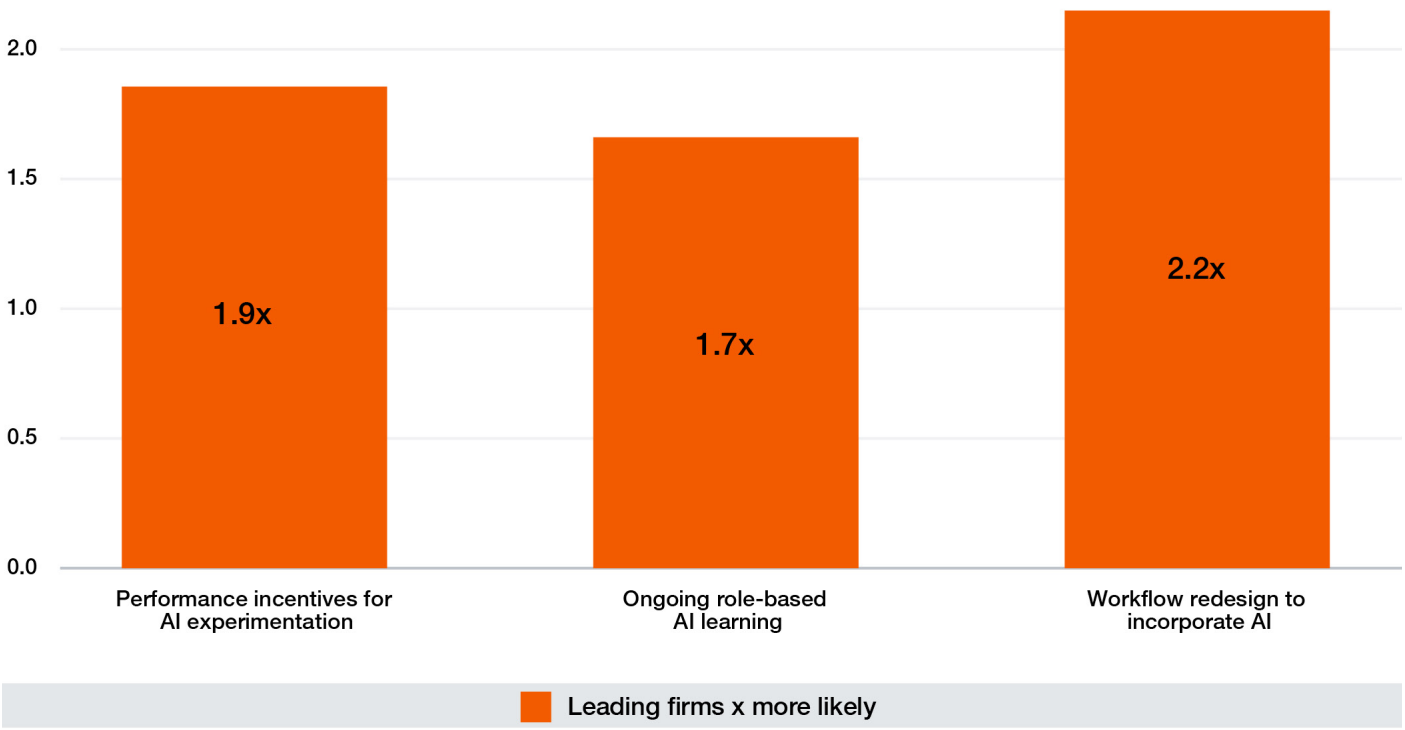


Figure 11. Organisational conditions associated with stronger AI returns.
Source: PwC, AI Performance Study 2026. These are global company findings, not Africa survey results.

For African organisations, the significance of these findings lies in what happens beyond adoption. AI creates opportunities to simplify processes, broaden access to expertise, and rethink how people and technology contribute together, while reflecting local customer needs, infrastructure realities, and growth opportunities.

Realising that potential will depend on how AI is integrated into the organisation: where accountability sits, how responsibly it is used, how decisions are made, and where human judgement adds the greatest value. Measuring progress will also require a broader view of impact, including quality, innovation, skills, customer outcomes, productivity, and growth.

04

AI opportunities vary across industries



Africa's industries are entering the AI transition from different starting points. Financial services and technology, media, and telecommunications report the highest levels of AI use, while consumer markets and government and public services have more room for adoption to grow.

But adoption tells only part of the story. Across industries, levels of augmentation and trust also vary, creating different opportunities and challenges as organisations seek to generate greater value from AI.

Industry starting points vary significantly across Africa

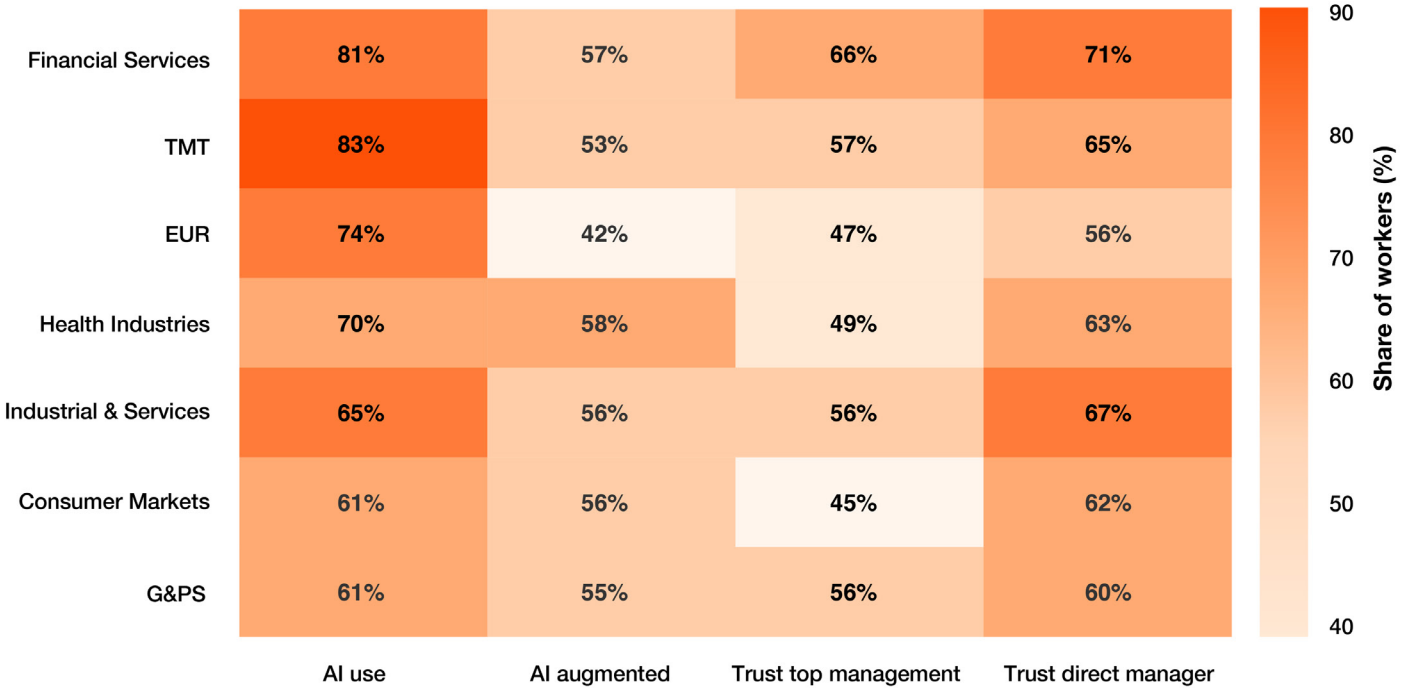
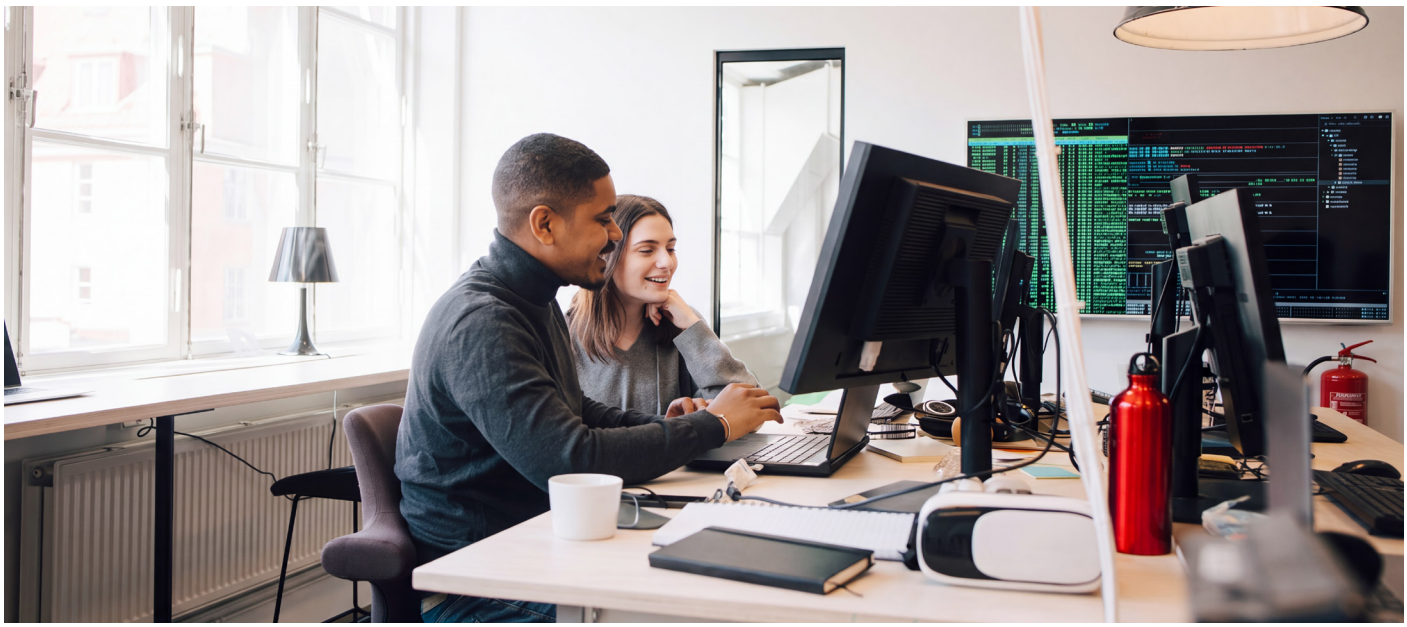
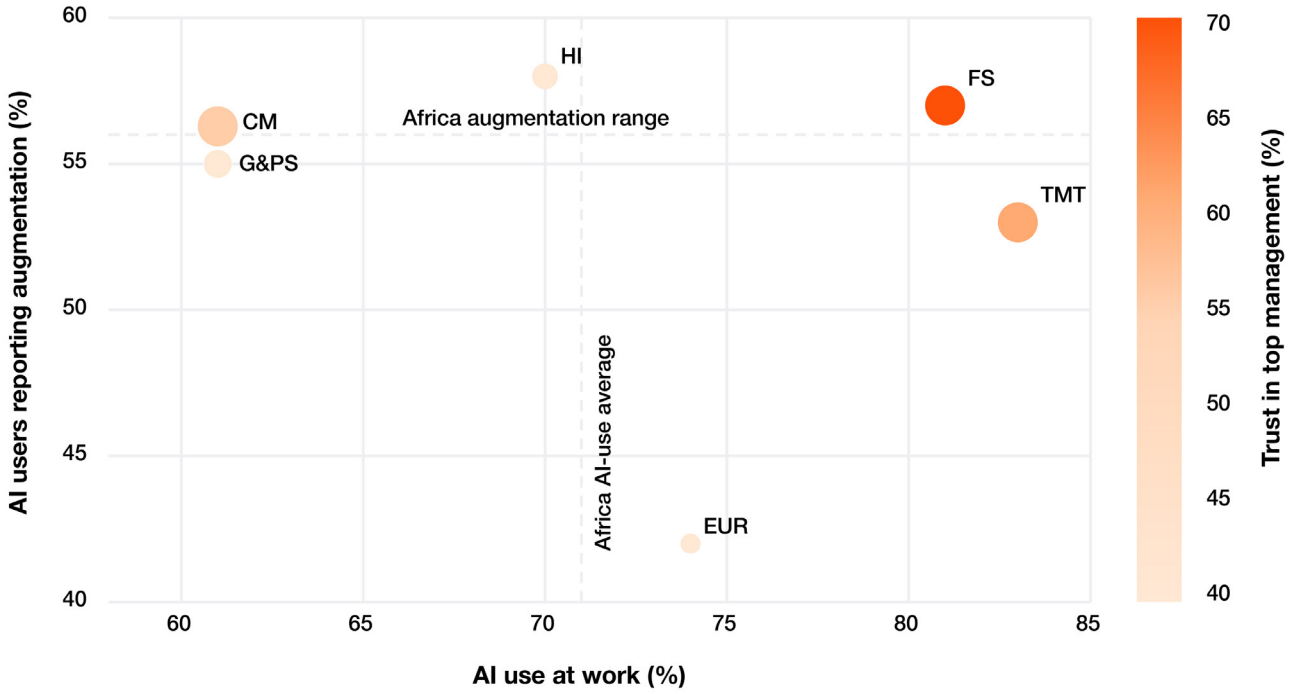


Figure 5. AI use, augmentation and trust by Africa industry cluster

Industry context, leadership, and work design are shaping what workers get back from technology.



More adoption does not automatically mean more workforce value



Bubble size reflects industry sample. Private equity excluded because n=9

Financial services can scale from a strong foundation

The survey shows Africa financial services entering the AI era from a position of real strength. 81% of workers in the sector have used AI at work in the past year, and 57% of those users say it is already augmenting, not just supplementing, their work, among the highest rates of any industry cluster in Africa.

This is underpinned by an unusually strong trust foundation, with 66% of workers trusting top management and 71% trusting their direct manager, well above the continental average. Having built this foundation, the sector's next move is not further adoption but redesign, embedding AI into complex, judgement intensive work while safeguarding transparency, governance, and accountability.

The prize on offer is not simply efficiency, but sharper judgement, stronger client outcomes, and genuinely more valuable work.

TMT can deepen the return from high adoption

Technology, media, and telecommunications (TMT) records 83% AI use, among the highest in the sample, while about 53% of AI users report augmentation. This gap suggests room to integrate AI more deeply into workflows and to measure its contribution to quality, speed, customer outcomes, and innovation.

Energy, utilities, and resources can broaden workforce value

In energy, utilities, and resources, 74% of workers report AI use, but only around 42% of AI users say the technology augments their work. Organisations can close this gap by extending AI-enabled maintenance, planning, safety, engineering, and operational decision support beyond a narrow group of specialist roles, with clear explanations of how work will change.

Health industries can combine augmentation with workforce care

Around 70% of health-industry workers use AI. The adoption and usage of AI varies across sub-industries. The highest adoption rates are observed in healthtech, medical schemes/funders, diagnostics and imaging, and hospitals, with the lowest adoption rates observed in long term nursing care.

Approximately 58% of users say AI augments their work. Other value drivers include diagnostics and clinical decision support, innovation acceleration, operational optimisation, and personalisation and patient engagement.

Taken together, these findings highlight the importance of considering technological progress alongside the wider employee experience.



Industrial and services industry can mobilise managers to drive performance and reinvention

Industrial and services is Africa's largest workforce cluster in PwC's Hopes and Fears 2026 survey, making its experience an important part of the continent's broader AI transition.

Around 65% of workers in the sector have used AI at work, and 56% of those users report that it augments their work. Alongside this level of adoption, trust in direct managers stands at 67%, among the strongest levels across Africa's industry clusters.

That trust gives managers an important role in translating organisational AI ambitions into practical, day-to-day change. Positioned close to employees and their roles, managers can help identify where AI can add value, support experimentation, and guide changes in how work is designed.

Equipping managers with the time, skills, and authority to play this role could help organisations build on an existing strength as they deepen their use of AI.

Consumer markets can bring AI closer to the frontline

Across Africa, 61% of consumer markets workers have used AI at work in the past year. With many employees in customer-facing, retail, and operational roles, the opportunity is to make AI relevant to the realities of their day-to-day roles. Involving frontline employees in the design of practical, industry-specific solutions, alongside accessible, role-based learning, can help people understand where AI can add value and how it may shape their roles and customer interactions.

Government and public services can turn AI adoption into public value

The government and public sector in Africa highlight the critical need for workforce growth and reinvention to sustain performance amid ongoing disruption. Differences in trust, readiness for change, and access to AI across the workforce are shaping employees' ability to adapt. Across Africa, 61% of government and public services workers have used AI at work in the past year. Global findings show that, although adoption is keeping pace with the broader workforce, AI use is less intensive, and workers report less value from it across several work outcomes. At the same time, burnout and cost-of-living pressures are increasing concerns around employee wellbeing and remuneration. These dynamics reinforce the need for targeted workforce interventions that improve productivity while managing costs, particularly by redesigning performance expectations for AI-augmented roles and equipping leaders to embed and sustain new ways of working.

05

Turn trust and management capability into an execution advantage

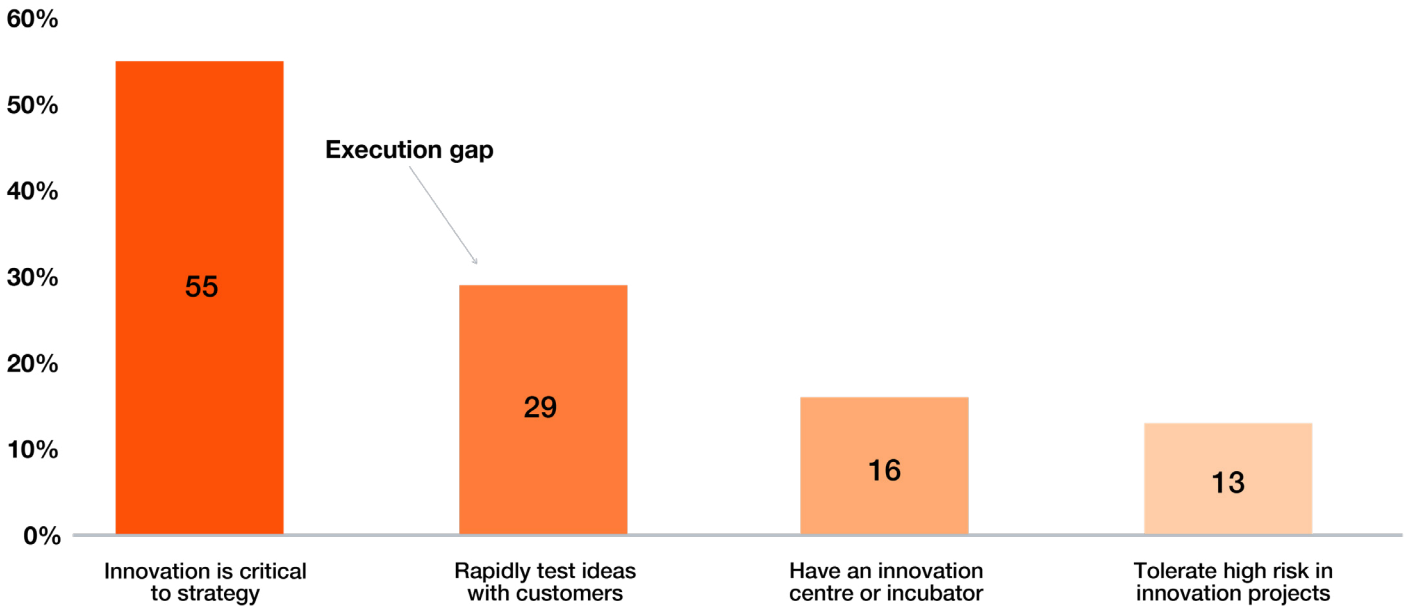


Africa's trust advantage can help organisations move faster, provided leaders use it well. Direct managers are central because they translate strategy into the lived experience of work. They explain priorities, create time for learning, decide how experimentation is handled, and help workers understand what new expectations mean for their roles.

Managers cannot drive reinvention without the right conditions around them. If performance measures prioritise short-term delivery and avoiding mistakes, there is little incentive to experiment. And if managers are expected to innovate without the time, authority, or space to test new approaches, experimentation is unlikely to become part of everyday practice.

The CEO findings suggest that this challenge extends beyond individual managers. While 55% of Africa's CEOs regard innovation as critical to strategy, only 29% rapidly test ideas with customers, 16% have a dedicated innovation centre or incubator, and 13% tolerate high levels of risk in innovation projects. These findings point to the importance of the organisational environment around innovation: whether experimentation is encouraged, supported, and embedded in how the business operates.

Innovation ambition needs operating conditions that support experimentation



Source: PwC's 29th Global CEO Survey: Africa perspective 2026.

African organisations can treat managers as translators and designers of change, not simply as implementation channels. That means equipping them to run safe experiments, challenge outdated processes, make responsible trade-offs, and support teams through changing workloads and skill requirements.

06

Make reinvention inclusive and economically meaningful



Africa's workforce energy exists alongside real financial pressure. Only 28% of workers say their household can pay all its bills and still have money left for savings, holidays, and extras. A further 46% can pay bills but have little or nothing left over, while 16% struggle to pay some or all bills each month.

This reality raises the stakes of workforce transformation. Learning cannot simply be added to already demanding jobs. AI adoption cannot be framed as an extra responsibility without considering workload, recognition, and reward. Workers need to see a credible relationship between new capabilities, valuable contribution, and opportunity.

Inclusion is also an economic issue. If AI advantage remains concentrated among senior, specialist or office-based workers, organisations will leave substantial productivity and innovation potential untapped. If they design for operational, customer-facing, and public-facing roles, they can expand the number of people able to contribute to and benefit from reinvention.

Financial pressure is sharper in Africa

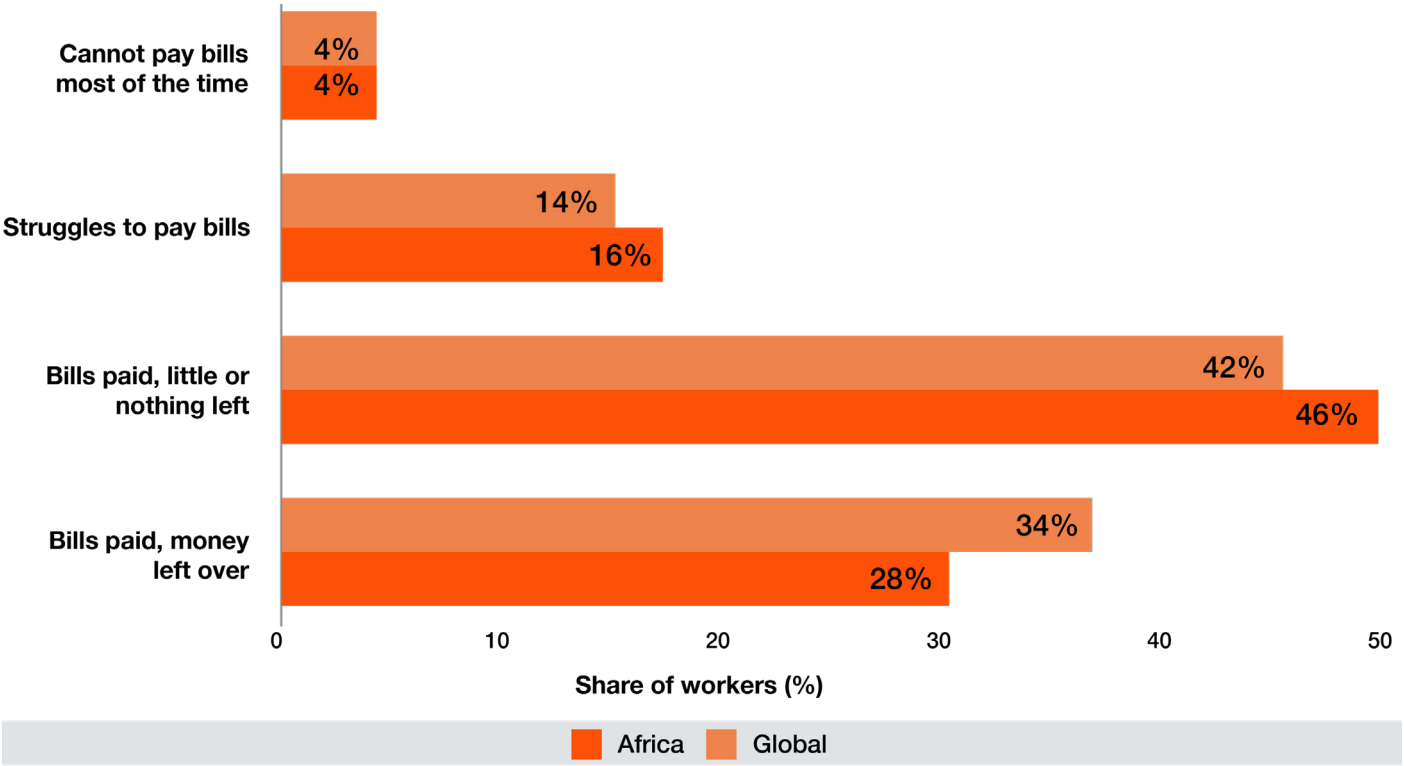


Figure 6. African workers face greater financial pressure than the global workforce

The aim is not to guarantee identical experiences across roles. It is to ensure that every part of the workforce has a relevant pathway: access to useful technology where appropriate, practical learning, a voice in redesign, clarity about changing expectations, and fair recognition of the value created.

Where African organisations should focus now

Africa's positive AI momentum creates the possibility of building a workforce that is more capable, innovative, and resilient. Realising that opportunity will require employers to move beyond deployment and focus on the conditions that produce workforce advantage.



1. Design for advantage, not simply adoption

Treat technology investment and workforce transformation as one business case. Measure whether AI improves quality, creativity, skills, productivity, innovation, and worker value, rather than focusing only on licenses, users or pilots.



2. Democratise access to AI-enabled opportunity

Do not allow AI advantage to become a privilege of senior, specialist or office-based roles. Identify practical use cases for operational, customer-facing, and public-facing work, with protected time to learn and experiment.



3. Use managers as translators of change

Give managers the license and authority to redesign work, not just responsibility for implementing technology. Equip them to explain change, run safe experiments, challenge outdated processes, and manage the tensions between delivery today and capability for tomorrow.



4. Connect skills to mobility and reward

Align performance and reward with the behaviour the strategy requires. Recognise learning, experimentation, effective AI use, and constructive challenges. If avoiding mistakes is the only behaviour that advances careers, workers will rationally avoid risk.



5. Protect workforce resilience

Review workload, employee experience, reward, and wellbeing alongside technology investment. Financial strain and limited capacity can turn learning into an extra burden. Workforce resilience is part of the economics of transformation.

Africa's advantage will depend on what organisations do next

Africa's workforce enters the AI era with important advantages. Adoption is widespread. Many workers are already using AI to strengthen complex work. Motivation is high, trust is comparatively strong, and more than half of surveyed workers are in roles well positioned to benefit from AI.

There are constraints. Enterprise roadmaps, governance, investment, innovation structures, and access to technical talent remain uneven. Financial pressure is real, and industry's starting points vary. These realities demand focus, but they need not define the narrative.

The bigger story is one of capacity. African workers are demonstrating appetite, adaptability, and ambition. Organisations now have the opportunity to build around those strengths, creating operating models that are more innovative, resilient, and inclusive than the ones they replace.

The economic case is already visible. Among Africa CEOs whose organisations invested in AI, 23% report revenue increases and 25% report cost reductions. At the same time, 81% of Africa CEOs expect economic conditions in their markets to improve. To convert that optimism into durable value, leaders must create space for longer-term reinvention, not only near-term optimisation.

> The next chapter will be shaped by organisations that move with their people, connecting technological change with how roles are designed, skills are developed, trust is built, and growth is shared.
>
> Africa's workforce is ready to reinvent work. The organisations that act with equal ambition can turn that readiness into continental advantage.

About the survey

PwC's Global Workforce Hopes and Fears Survey 2026 gathered responses from 49,364 workers across 48 countries and regions and 29 sectors during May and June 2026. The Africa analysis includes 1,733 workers across Algeria, Kenya, Morocco, Nigeria and South Africa.



Authors

Dr Dayalan Govender (PhD)

(Associate Professor) Africa Workforce Leader, PwC South Africa

Tel: +27 (0) 11 797 4846
dayalan.govender@pwc.com

Marthle du Plessis

Partner | Workforce Lead, South Market Area, PwC South Africa

Tel: +27 (0) 11 797 4075
marthle.du.plessis@pwc.com

Karen Greyvenstein

Partner | Workforce Lead, East Market Area, PwC Mauritius

Tel: +230 404 5069
greyvenstein.karen@pwc.com

Uzoaku Osadi

Associate Director | Workforce Transformation Lead, PwC Nigeria

Tel: +234 802 230 5605
uzoaku.osadi@pwc.com

David Tsey

Associate Director | Workforce Transformation, PwC Ghana

Tel: +233 21 761 500
david.tsey@pwc.com

Contributors

Harshini Vallabh

Beverly Green

Angelique Herbst

Liza de Koning

Prelene Parkash

Anneke Fellows

Claudette Ramnarain

Carla Greenland

This thought leadership has been prepared by PwC for general guidance on matters of interest only and does not constitute professional advice. You should not act upon the information contained in this thought leadership. No representation or warranty (express or implied) is given as to the accuracy or completeness of the information contained in this thought leadership and, to the extent permitted by law, PwC, its members, partners, directors, employees, related entities, and agents do not accept or assume any liability, responsibility or duty of care to you or anyone else for any consequences of you or anyone else acting, or refraining to act, in reliance on the information contained in this thought leadership or for any decision based on it. At PwC, we help clients build trust and reinvent so they can turn complexity into competitive advantage. We're a tech-forward, people-empowered network with more than 360,000 people in more than 130 countries and territories. Across audit and assurance, tax and legal, deals and consulting, we help clients build, accelerate, and sustain momentum. Find out more at www.pwc.com/za.

© 2026 PwC. All rights reserved (2026-923-36)