



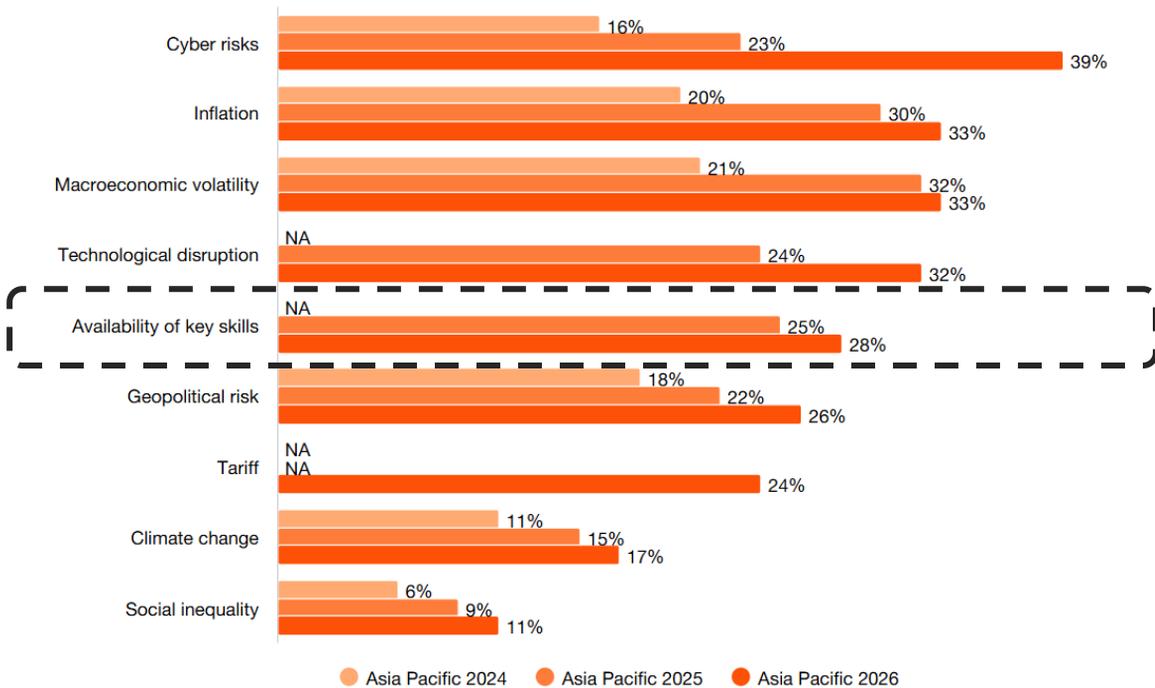
Workforce Hopes and Fears Survey 2025

Do you know what it
takes to build
an AI-ready workforce?



Asia Pacific CEOs feel increasingly exposed to a multitude of risks, including cyber risks, technological disruption, and key skills availability

Q. How exposed do you believe your company will be to the following key threats in the next 12 months?
(Only showing 'Highly and extremely exposed')



Despite the risks, governments and enterprises across sectors, globally and in the region are investing on AI...

Global

61%

of investors believe accelerated adoption of AI is very or critically important to generating value.

Indonesia and Southeast Asia

THE DIPLOMAT

Vietnam Signs Agreement with Nvidia to Establish AI Research and Data Centers

EMERGING TECHNOLOGIES

Why AI is Southeast Asia's new engine for profitable growth

Nov 21, 2024

Singapore eyes to become Southeast Asia's AI hub with \$1 billion investment

21 February, 2024 By Wahid Pessarlay

ANTARA
INDONESIAN NEWS AGENCY

Indonesian govt oversees Microsoft's US\$1.7 bln investment

Source: PwC, AI Job Barometer 2025 and 2024

...because there is no doubt of the **importance** and the **benefits** of AI for Indonesia

\$366bn

Potential contribution to Indonesia's GDP by the year 2030¹.

35%

Year-on-year growth in new jobs in Indonesia, like data analyst and ML engineers².

57%

Of Indonesia-based CEOs believe AI will increase efficiency³.

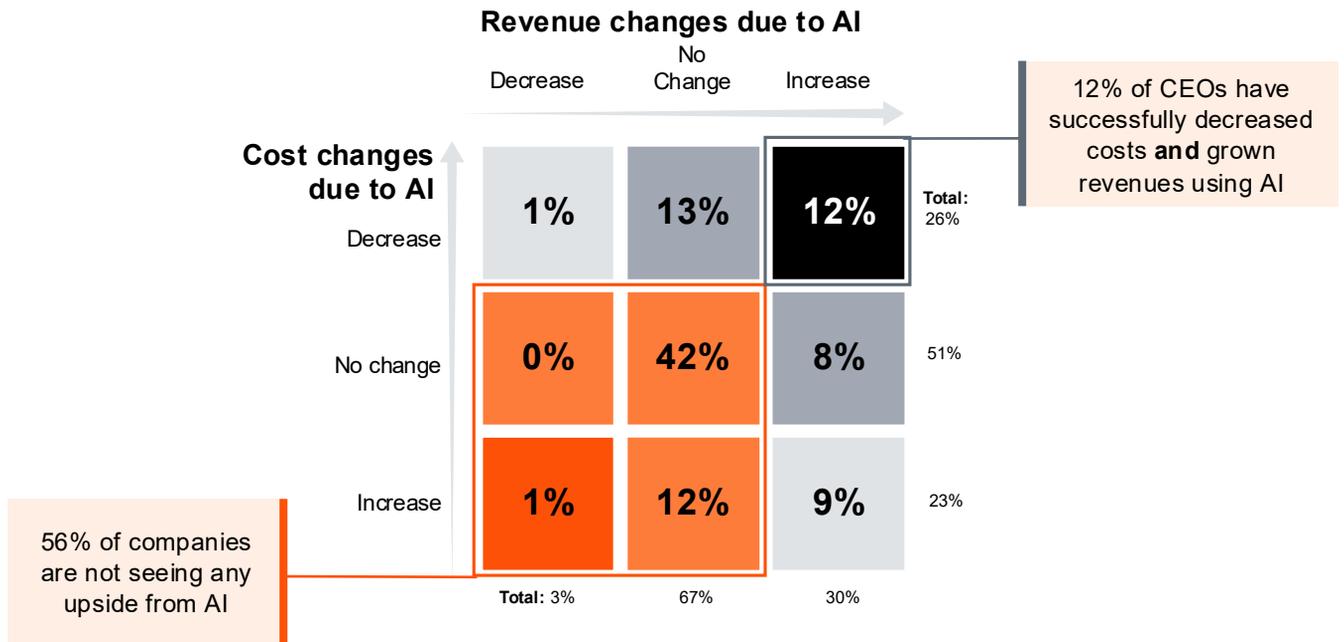
85%

Of Indonesia-based CEOs believe AI will increase revenue and profitability³.

Sources:

1. Deputy Minister of Comms and Digital Affairs, Tech&Telco Summit Indonesia 2025
2. LinkedIn Jobs on the Rise 2023
3. PwC 27th Asia Pacific CEO Survey

Yet, most companies have not realised higher revenues or lower costs from AI, even as a minority achieve both

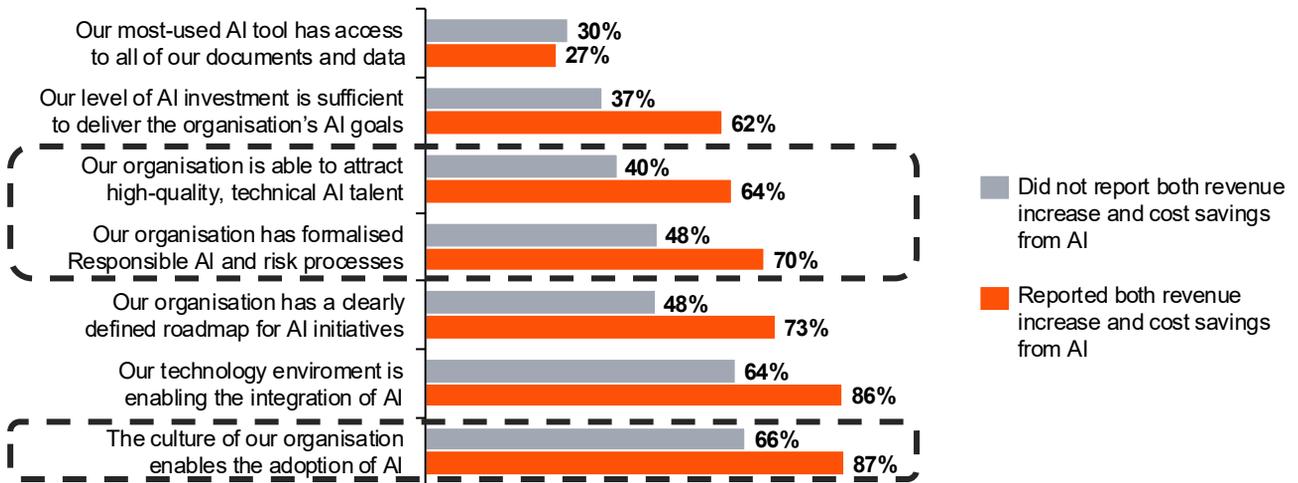


Source: PwC's 29th Global CEO Survey

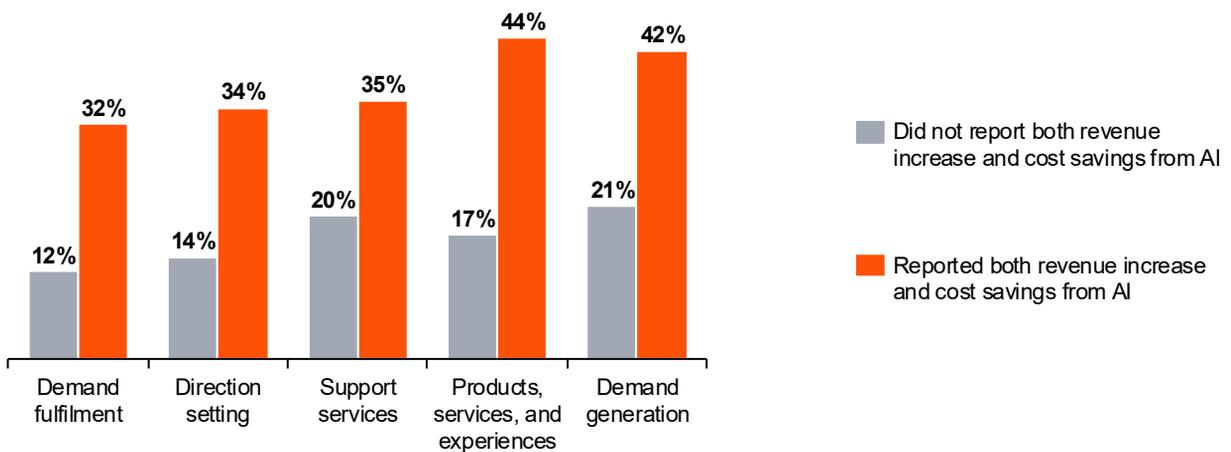


Companies who reported receiving revenues and cost savings from AI in the last 12 months have better AI deployment and foundations

Share of CEOs agreeing to AI foundation practices, by whether they received revenues and cost savings from AI



Share of CEOs applying AI in different areas of their business, by whether they received revenues and cost savings from AI



Source: PwC's 29th Global CEO Survey

Our Global Workforce Hopes and Fears Survey

is one of the largest workforce sentiment surveys conducted globally for 5 years, completing the business landscape understanding

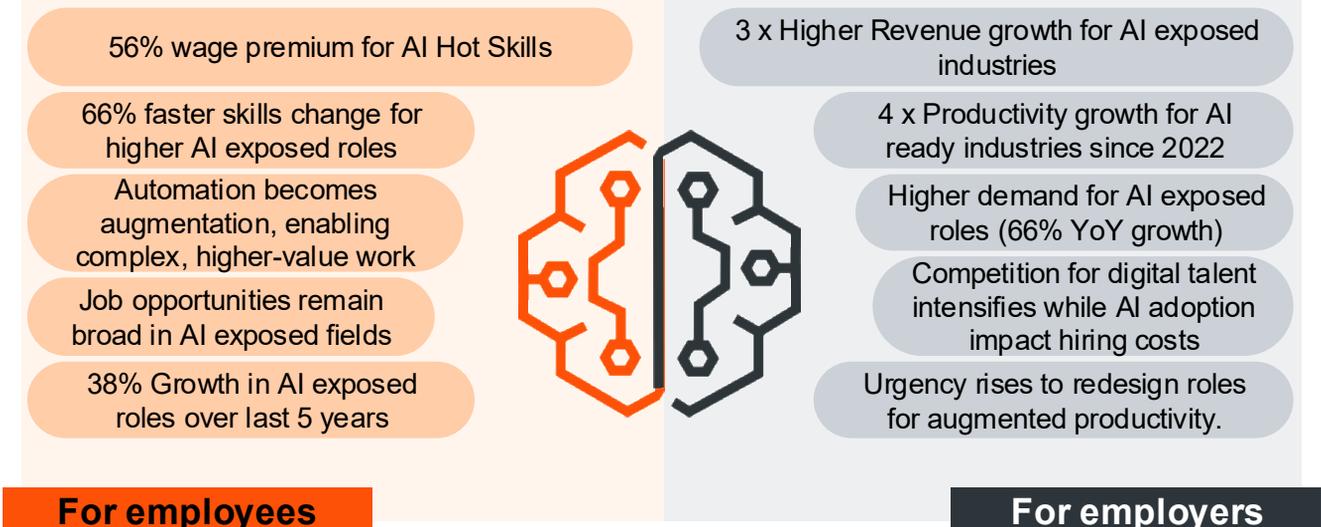
Survey scope and demographics



Key themes from latest survey



AI, technology disruption, and workforce shifts are reshaping expectations on both employers and employees



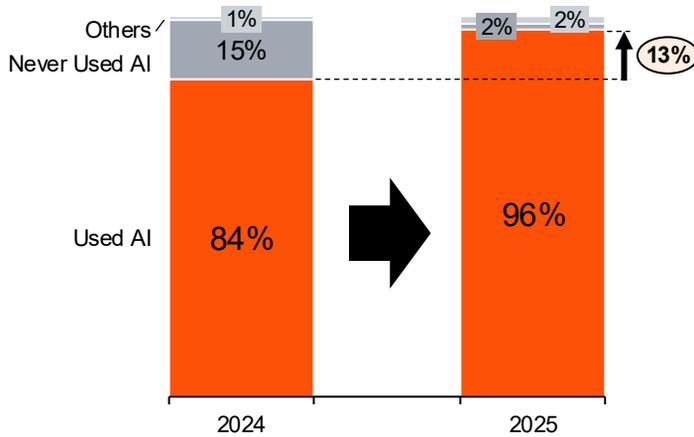
Source: PwC's 2025 Global AI Jobs Barometer



In 2025, we saw AI moving from hype to adoption as older generations are 9-12% more secure with job security

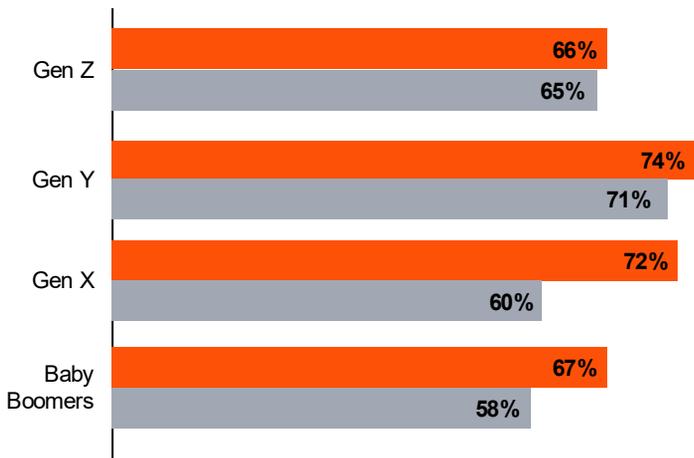
2025 brought further adoption of Gen AI tools, with **13% increased adoption rate** compared to previous year

Respondents' Gen AI usage (2024 vs 2025)



Gen X and Baby Boomer are now warming to AI, embracing it as **a driver of job security**

Actual experienced job security increase (2025) vs. Perceived job security increase (2024) from AI in last 12 months



■ 2025 - to what extent you think Gen AI will increase your job security in the last 12 months
■ 2024 - to what extent you think Gen AI will increase your job security in the next 12 months

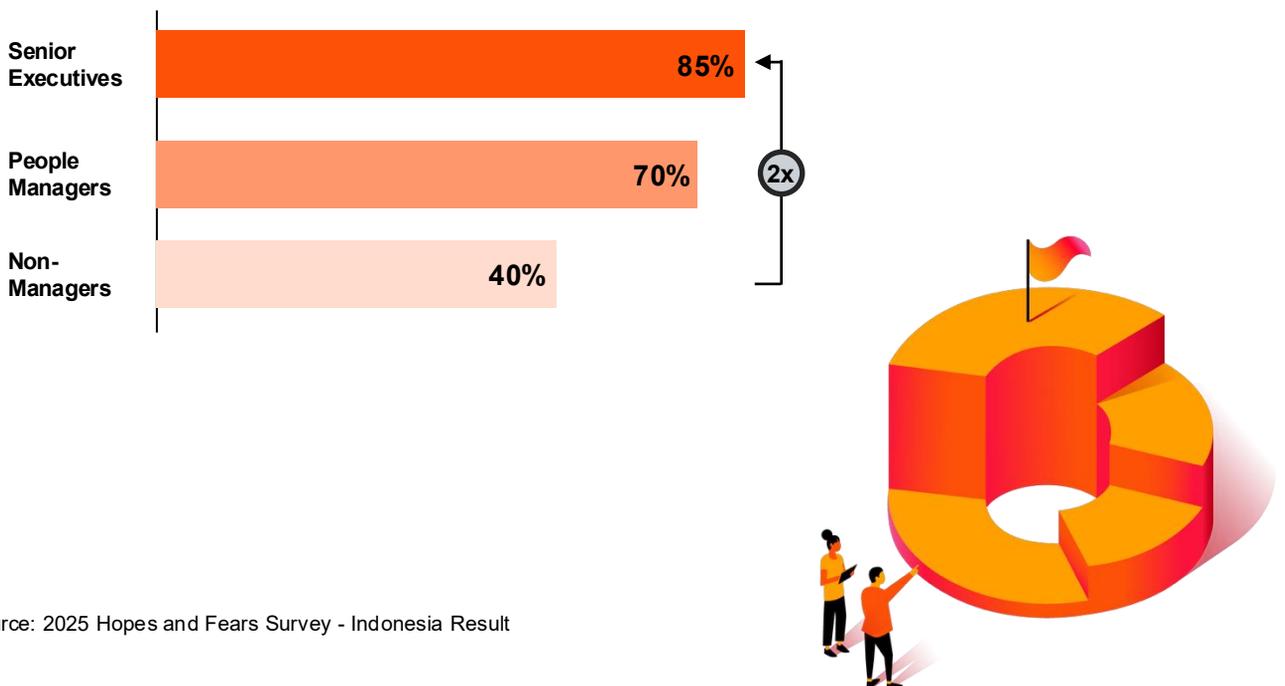
Source: 2025 Hopes and Fears Survey - Indonesia Result

Most in Indonesia see AI's upside; senior management feels 2x more optimistic than lower-level staff

AI's predicted positive impact in the next 3 years



Level of optimism for current job position



Source: 2025 Hopes and Fears Survey - Indonesia Result



While AI generates efficiency and time savings, the benefits are distributed unevenly

Think AI increased time they spend working over last year

**12%
More***

Experiencing fatigue and overwhelm feelings

**20%
More***

Planning to apply for a new job in the next 12 months

**8%
More***

Worried about how AI may affect work

**15%
More***

* Compared with Gen X, Source: 2025 Hopes & Fears Survey - Indonesia Result

Gen Z

**6%
More***

Think AI increased their productivity over last year

**9%
More***

Look forward going to work frequently

**2%
More***

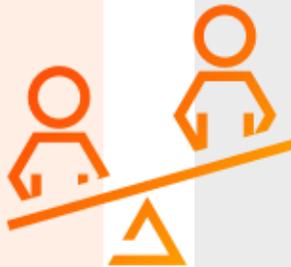
Likely to ask for a promotion in the next 12 months

**14%
More***

Excited about how AI may affect work

* Compared with Gen Z, Source: 2025 Hopes & Fears Survey - Indonesia Result

Gen X



Three interconnected themes emerging from this year's results reveal the gap between adoption by different levels and generations

AI power gap



82% of Indonesian leaders understood their organisation's long-term goals and objectives

However, only **56%** of staff-level believe that their leaders are **capable of leading** to achieve the long-term goals and objectives

Mobility through skills

~90% of leaders **learnt new skills** at work that helped their career, in the last 12 months



In contrast, only **62%** of staff-level felt **supported by their managers** in building new skills

Psychological safety and trust

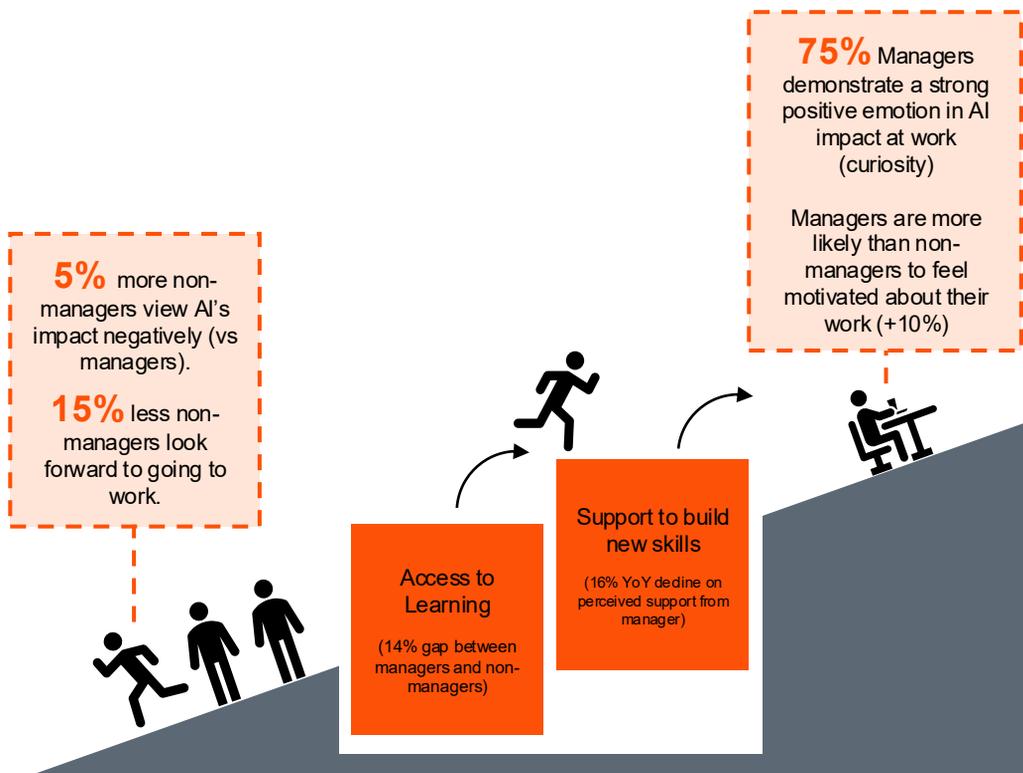
>70% of managers' report significantly greater trust in both direct and top management than non-managers.

Only 1 in 2 Gen Z employees feel like they can speak openly with their manager



Source: 2025 Hopes and Fears Survey - Indonesia Result

Structural barriers such as the AI power gap between management and staff are linked to retention risk



Source: 2025 Hopes and Fears Survey - Indonesia Result

What does this mean for you:

1

Inspire employees with a clear vision of the future

- Provide clarity of how your organisation will reach its long-term goals – and workers' place in that strategy.
- Share how you plan to reimagine work.
- Be disciplined about making sure workers 'get it'.

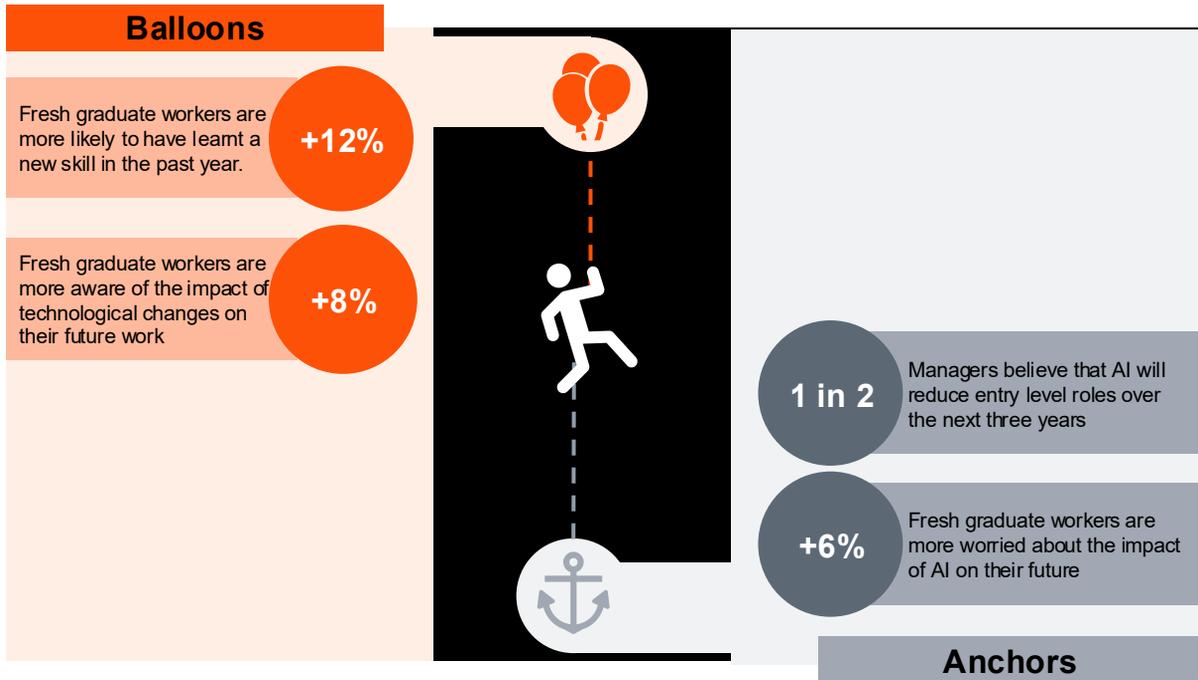
2

Treat security and pay as core motivators

- Pay matters, but without credible job security, motivation erodes.
- Link rewards to a drive for AI adoption and value creation.

Workers who feel supported to upskill are 73% more motivated

While younger workers are more adept at being agile at work, fear and lack of meaning are stalling the progress on the way up



Source: 2025 Hopes and Fears Survey - Indonesia Result

What does this mean for you:

1

Acknowledge the uncertain future – particularly for entry-level workers

- Be transparent with workers about the scale of technology transformation and its impacts on your business.
- Be explicit about how entry-level hiring and roles are changing now – and what remains uncertain for the future.

2

Create skill pathways

- Recognise that what leaders see as skill reallocation can be threatening and demotivating to workers.
- Foster a culture of curiosity, experimentation and provide resources for continual learning.
- Be clear which skills will be most valued to your organisation – and share the upskilling plans you have to get them.

Workers who feel most aligned with leadership goals are 78% more motivated

A lack of trust and psychological safety among junior employees is further undermining workforce productivity and motivation

	Non-managers <i>(percentage point difference compared to Indonesia's average)</i>			Managers <i>(percentage point difference compared to Indonesia's average)</i>		
	Gen Z	Gen X	Gen Y	Gen Z	Gen X	Gen Y
My team supports me if I ask for help or advice	-6	-7	-11	+5	+10	+12
I feel comfortable sharing my honest opinions about social and political issues with my team	-8	-3	-8	+5	+13	+12
My team treats failures as opportunities to learn and improve	-8	2	-12	+7	+17	+8
It is safe to try new approaches in my team	-8	-2	-13	+8	+11	+10
I feel comfortable sharing my honest opinions about social and political issues with my team	-9	-3	-12	+7	+8	+11

Source: 2025 Hopes and Fears Survey - Indonesia Result

What does this mean for you:

1

Address trust gaps

- Openness can go a long way to reducing fear and building trust.
- Communicate by example – recognise the power of role modelling.
- Invest in building managers and leaders with the right trust-building skills.

2

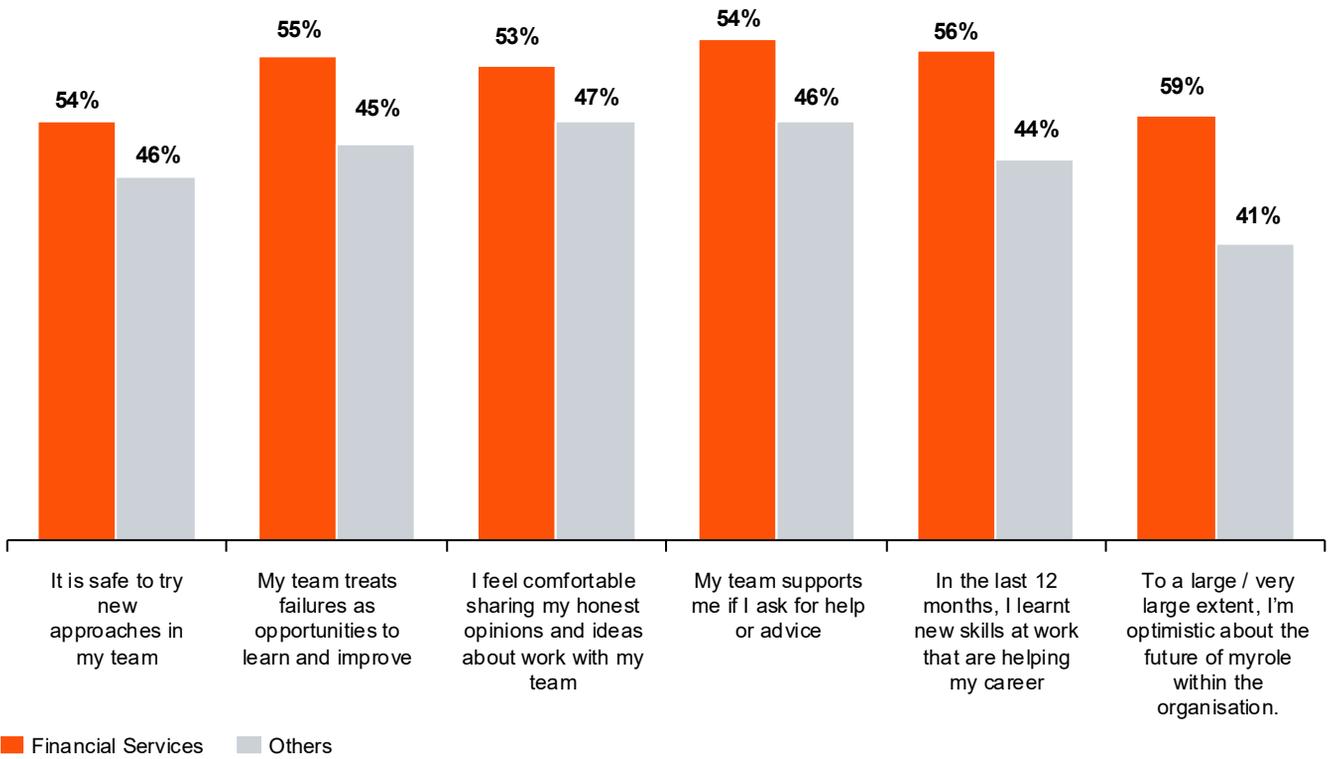
Motivate to innovate – and reinvent

- Consider psychological safety: Constructive candour is at its heart.
- To drive high performance, encourage employees to speak up, disagree respectfully and admit mistakes.
- Power innovation by making experimentation safer – but be open with examples of what didn't work.
- Open for disagreement, and show vulnerability.

Workers with highest trust in managers are 72% more motivated.

Hope is not lost, FS tops the chart as workers feels most psychologically safe, trusting, motivated and optimistic about the future

Worker agreement about their level of psychological safety at work and optimism for job role



Financial services companies yield more motivated employees because they have more:



Career and skill development opportunities



Purposeful autonomous work roles



Worklife balance & flexibility

Source: 2025 Hopes and Fears Survey - Indonesia Result

Organisations need a systemic approach to design an organisation that is AI ready.

We are equipped to support your journey to AI plug and play



Closing the AI power gap

Building adaptability and speed in structure, processes and leadership

What you can do:

- Define a clear **workforce strategy & capability roadmap**
- **Plan workforce shifts** with data-driven scenarios
- Redesign **structures & job architecture** for agility
- Align leadership & accelerate change adoption
- Digitise HR and **unlock insights with people analytics**
- Embed **cultural behaviours** that strengthen agility & accountability
- **Build the right structures and ways of working** to fully leverage technology

Enabling growth, movement and global opportunities for talent

What you can do:

- Create clear career and skill pathways with Indonesia-to-regional/global succession routes
- Enable vertical and cross-border mobility while managing the sensitivities of skill shifts
- Build a culture of curiosity and continual learning with transparent upskilling priorities
- Set clear mobility policies and costs and ensure reliable payroll and benefits
- Design an EVP and experience that fuels vertical growth and regional opportunities.



Mobility through skills



Enhancing psychological safety & trust

Creating a safe, compliant and inclusive environment for employees

What you can do:

- Strengthen culture and **trust across generations and ranks** through openness, psychological safety, and **constructive candour**
- Model inclusive behaviour — communicate by example, **show vulnerability**, and be open to disagreement.
- **Build leaders and managers with trust-building skills** so they can create safety for speaking up, disagreeing respectfully, and **admitting mistakes**.
- Encourage innovation safely by **making experimentation acceptable** and openly sharing what didn't work.
- Reinforce **protection and fairness** with strong policies, compliance, and defensible processes.
- Support wellbeing, ethics, DEI, workplace safety, and fair dispute resolution for all employees.

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