

The Workforce Productivity Report

A New Perspective on our Productivity Challenge in the Age of AI

EnterpriseWorks | 2026

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KEY FINDINGS

A new perspective

We are at a pivotal moment. Three forces are converging to reshape work: stalling productivity growth, rising workforce stress, and the rapid acceleration of AI.

Long-term productivity growth has declined over the past decade in both Australia and New Zealand, putting pressure on competitiveness, wages and living standards.

At the same time, stress and burnout risk are rising, while AI is changing how work is done.

Our independent research drew on 400+ ANZ knowledge workers and senior leaders, and over 125 research sources.

The key finding is that significant unrealised productivity potential exists inside large organisations.

The answer isn't simply to work harder or invest more. It is to unlock the potential already inside our organisations, and build the capabilities the AI era demands.

This report shows where productivity is lost, how we reclaim it, and why sustainable growth comes not from doing more with less, but from designing better ways of working.

Darren Moglia

Managing Director



Research Sponsor



Our research reveals a 32-point gap between understanding strategy and organising work around the most important priorities.

83%

understand how their work connects to strategic priorities.

only 51%

say their organisation organises work around the most important priorities.

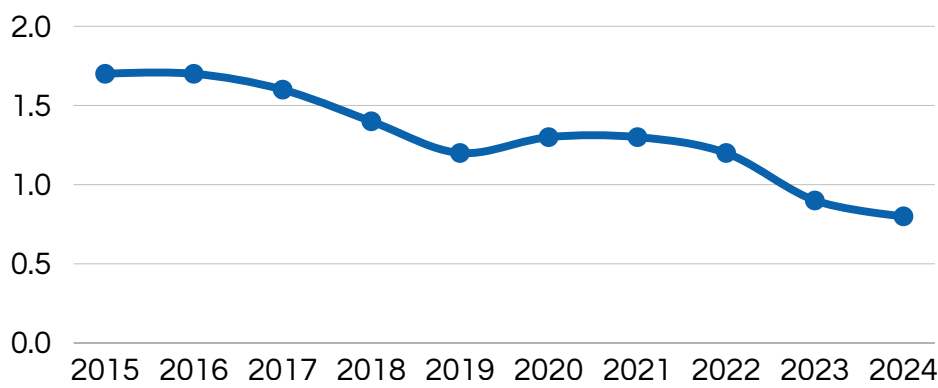
¹EnterpriseWorks ANZ Survey of knowledge workers in large organisations, 2026

WHY THIS MATTERS NOW

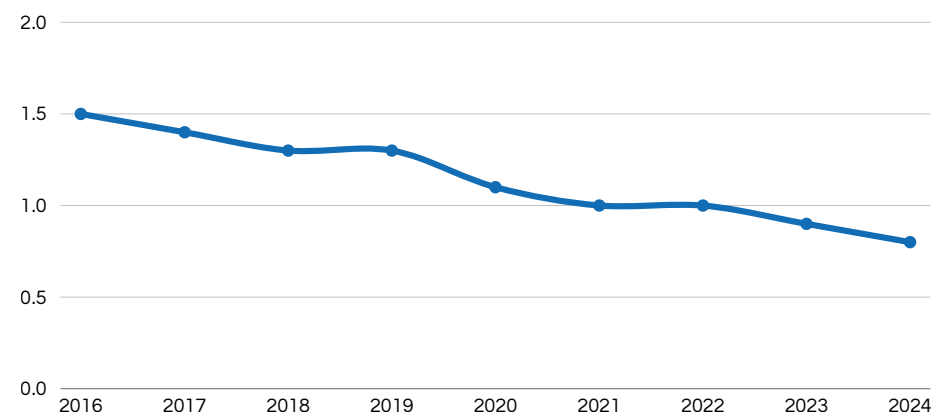
Productivity, stress and AI are converging

Weak long-term productivity growth

Australia's 20-year average productivity growth rate²



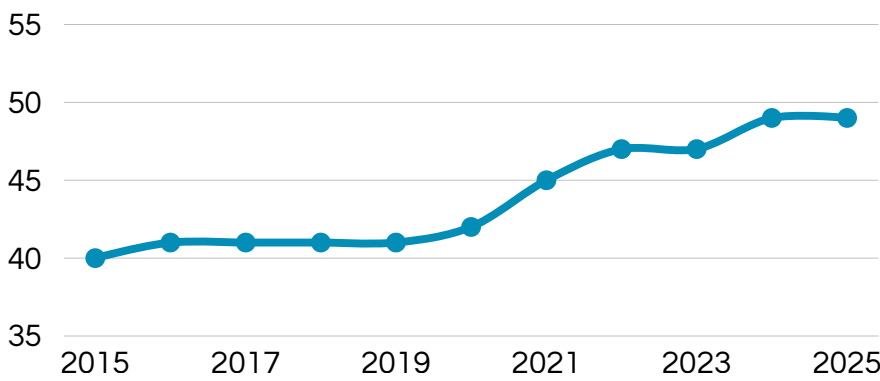
New Zealand's 20-year average productivity growth³



² ³EnterpriseWorks analysis of ABS & Stats NZ data

Rising stress at work

ANZ workers who reported feeling stress during a lot of the day yesterday⁴



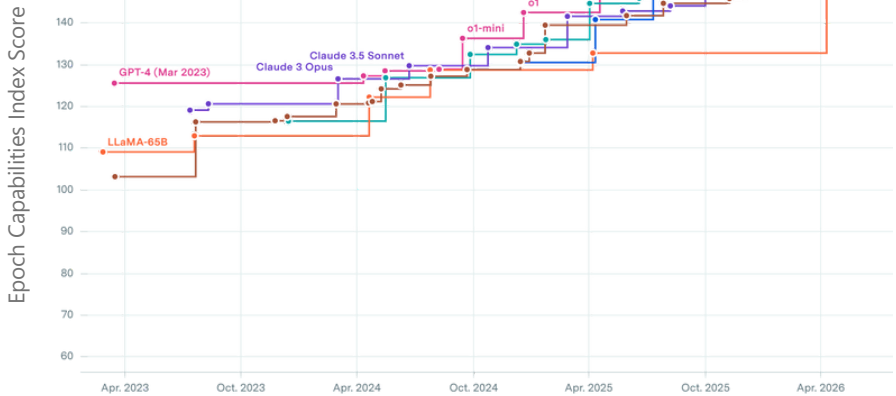
"Leading today takes more emotional and mental stamina than it did two years ago - 68% agree or strongly agree"⁵

Australia		New Zealand	
Strongly Agree	37%	Strongly Agree	35%
Agree	31%	Agree	33%

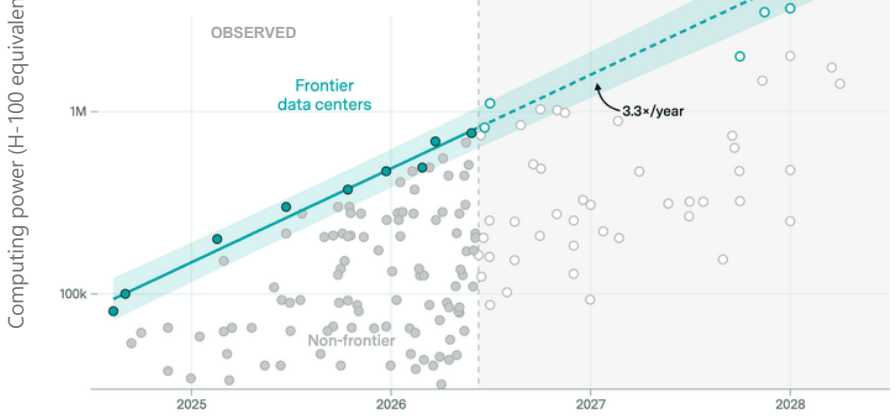
⁴Gallup, 2026 | ⁵The CEO Institute, 2026

Rapid acceleration of AI capability

AI model capability is rising⁶



AI computing capacity is rising⁷



⁶ ⁷Epoch AI, 2026

WHAT HAS CHANGED

Work has become complex and fragmented

Work has fundamentally changed over the last decade. Teams now operate across more functions, systems and channels, while risks and regulation have also increased.

More of the workforce's time is now consumed by coordination, reporting and manual work.

The environment around work has become more complex

- Cross-functional, hybrid and distributed work
- Climate, sustainability, cyber risk & supply chain resilience
- Increased regulation and board governance

Systems, data and alerts have been layered on

- Data spread across systems, email, chat and dashboards
- SaaS tools have multiplied faster than integration capacity
- New tools came with chat and notifications

Meetings and coordination have overtaken focused work

- More meetings and status updates
- More manual reporting and ad hoc requests
- Less time for focused work, strategy and learning

“We are working harder and longer but we are not working smarter”

Dr Alex Robson, Deputy Chair, Productivity Commission, June 2026⁸

We're working harder, but getting less done

These issues compound: strategy that isn't connected to daily work, and systems and data that are not connected. That results in people trying to close the gap with manual coordination, manual reporting and more meetings.

Strategy is clear but breaks down in execution

- Strategy loses clarity when it is not connected to daily work
- Too many priorities compete for the same capacity
- Changing priorities and rework consumes capacity

83%

understand how their work connects to strategic priorities.¹

51%

say their organisation organises work around the most important priorities.¹

Fragmented systems and data create manual work

- Workflows and data are spread across many tools
- Reporting is still too manual and often out of date
- Activity is measured more than outcomes and value

38%

spend significant time on manual work.¹

42%

spend significant time on manual reporting.¹

Meetings and coordination replace focused execution

- Meetings, chat and notifications consume the working week
- Leaders and teams spend more time aligning than delivering
- Focused work, learning and improvement are crowded out

45%

on average of the work week is spent in meetings.¹

only 44%

agree most meetings are necessary and move work forward.¹

¹EnterpriseWorks ANZ Survey, 2026

The future is more connected and productive

Higher productivity will not come from doing more or asking people to work harder.
It will come from designing organisations where strategy, systems and people are better connected.
The path back to growth is simpler organisations, clearer priorities and effort that converts into outcomes.

This report sets out three shifts to unlock our potential

	Strategy	Align Execution	Turn strategy into focused execution by connecting priorities, capacity, decisions and outcomes.
	Systems	Connect Systems, Data & AI	Streamline workflows and connect core systems, data and AI capabilities to move work forward.
	People	Evolve Teams & Skills	Cultivate the leadership practices, team routines and AI skills needed to drive sustainable performance.

The ANZ Productivity Challenge



Productivity growth is central to our way of life.
It is the main long-term driver of living standards.

It is how we create more value from every hour worked,
supporting better wages, services and quality of life over time.

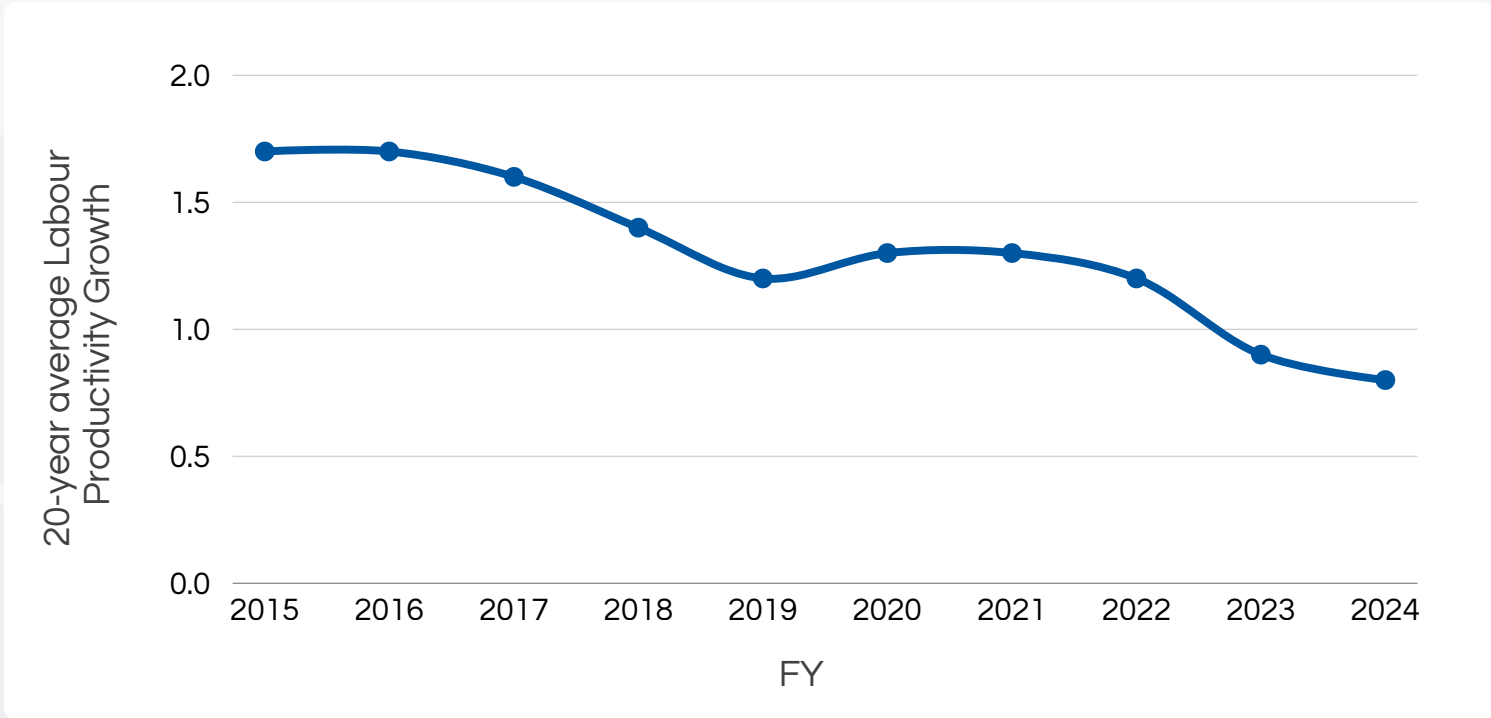
Long-term productivity growth has roughly halved in both
Australia and New Zealand over the past decade, putting
future living standards at risk.

Our slowest productivity growth in 50+ years

Productivity growth powers living standards. When it slows it puts pressure on wages growth and living standards.

Australia's long-term labour productivity growth has been declining for the past decade, from a 20-year average of 1.7% a decade ago, to just 0.8%.²

Productivity growth has stalled in the past year, with labour productivity growing by only 0.3%, despite total hours worked rising by 2.2%.⁸



²EnterpriseWorks analysis of ABS data, 2024

39%

of Australian knowledge workers we surveyed said they lose significant time to manual tasks and duplication.¹

¹EnterpriseWorks ANZ Survey, 2026

only
0.3%

labour productivity growth in the past year, while total hours worked rose 2.2% over the same period.⁸

⁸Productivity Commission, 2026

“Australia’s labour productivity growth is going from bad to worse”

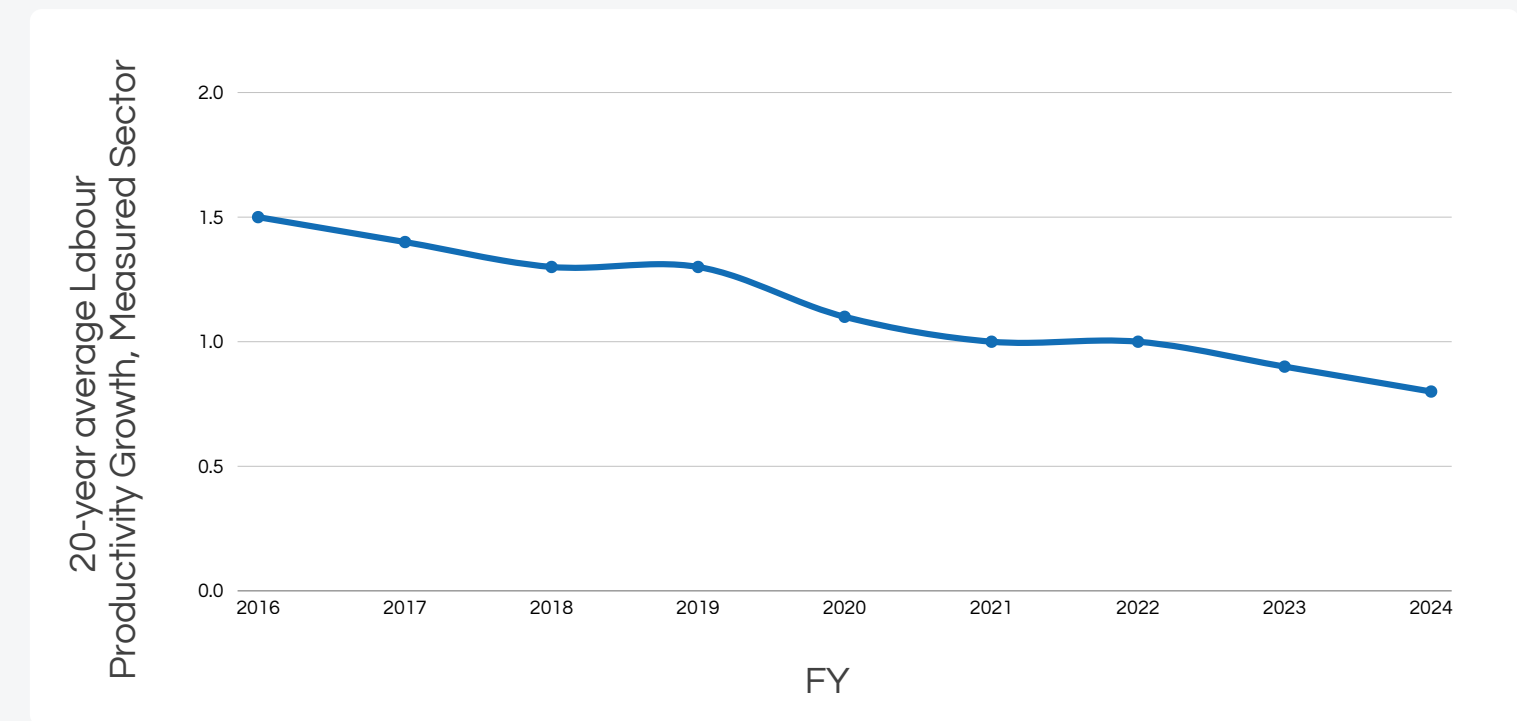
Dr Alex Robson, Deputy Chair, Productivity Commission, June 2026⁸

A smaller economy must work smarter

On Stats NZ's measured-sector basis, long-run productivity growth has fallen by almost half, from 1.5% to 0.8% a year.³

The smaller the economy, the more important working smarter becomes. New Zealand can't just count on more people, more hours or more investment.

Organisations need to create more value from the capacity, systems and technology they already have.



³EnterpriseWorks analysis of Stats NZ data

37%

of New Zealand knowledge workers we surveyed said they lose significant time to manual tasks and duplication.¹

¹EnterpriseWorks ANZ Survey, 2026

Competitiveness has declined

New Zealand slipped from 31st to 37th in IMD's 2026 ranking,⁹ even with management practices ranked higher than Australia.^{9 10}

^{9 10}IMD, 2026

Productivity sits below OECD peers

New Zealand is 28th of 38 OECD countries for labour productivity,¹¹ with a smaller population and capital base to draw on.

¹¹OECD, 2025

The human and financial costs

Those shifts are now showing up as real costs to people, organisations and the economy.
If left unaddressed, these costs will compound on wellbeing, productivity, competitiveness and future living standards.

The cost to people	The cost to organisations	The future costs
Rising stress at work 49% of workers in ANZ felt a lot of stress during the previous day, the second highest of any region.⁴ Burnout risk 39% of Australian workers reported feeling burnt out at work.¹²	Lost capacity On average, 45% of the work week is spent in meetings. 38% spend significant time on manual tasks and 42% on manual reporting.¹ Effort does not convert into value Only 51% say their organisation organises work around the most important priorities, with 49% reporting rework or wasted effort.¹	Lower wages & living standards CBA estimates that 1% annual productivity growth sustained over 20 years would make the median Australian household around \$20,000 a year better off in real terms.¹³ Missing the AI opportunity Estimated upside of A\$116bn to Australia's GDP over the next decade¹⁴ and NZ\$76bn to New Zealand's economy by 2038¹⁵ will only be realised if systems, data and skills are ready.

⁴Gallup, 2026 | ¹²ACTU, 2025

¹EnterpriseWorks ANZ Survey, 2026

¹³CBA, 2025 | ¹⁴Productivity Commission, 2025 | ¹⁵MBIE, 2025

Three shifts to unlock our potential



Align Execution

Turn strategy into focused execution by connecting priorities, capacity, decisions and outcomes.

Connect Systems, Data & AI

Streamline workflows and connect core systems, data and AI capabilities to move work forward.

Evolve Teams & Skills

Cultivate the leadership practices, team routines and AI skills needed to drive sustainable performance.

The next three sections turn each shift into practical action

Align Execution

Turn strategy into focused execution by connecting priorities, capacity, decisions and outcomes.

Strategy is clear, but work is not aligned

Most organisations have a clear strategy their people understand; what's missing is the connection between strategy and daily work.

While 83% of employees understand the strategy, only half say their daily work is aligned to the most important priorities.¹

As strategic direction moves through layers and teams, it fragments into local priorities and activity that doesn't always convert into value.

“ The challenge isn't communication. Strategy is not embedded in how decisions are made. Teams understand the intent, but optimise for local priorities. ”
Head of Service Design, Financial Services

¹⁶EnterpriseWorks ANZ Knowledge Worker Interviews, 2026

83%

understand how their work connects to strategic priorities.¹

¹EnterpriseWorks ANZ Survey, 2026

only 51%

say their organisation organises work around the most important priorities.¹

41%

of employees' time each day is spent on work that doesn't contribute to the value their organisation creates.¹⁷

¹⁷Deloitte, 2025

Leaders can't align work they can't see

The link between strategy and work is invisible in many organisations.

Employees are unclear on what's expected, and don't have the information they need to make decisions quickly. Executives can't see how teams are making trade-offs and delivery decisions.

When leaders and teams don't have real-time visibility, effort goes into making work look aligned, rather than moving work forward.

“ We do not have a consistent view of capacity or prioritisation and planning excludes BAU work. ”

Senior Leader, Property Industry

¹⁶EnterpriseWorks ANZ Knowledge Worker Interviews, 2026

only
51% said their work is organised around the most important priorities.¹

¹EnterpriseWorks ANZ Survey, 2026

more than
1 in 3 lack the data and reporting needed to make informed decisions quickly.¹

35% of senior executives name the disconnect between planning and execution as their #1 barrier to reinvention.¹⁸

¹⁸Project Management Institute, 2025

Priorities compete for the same capacity

New priorities are often added without stopping or sequencing existing work.

Without a clear view of capacity, teams commit to more than they can deliver, creating delivery risk, overload and constant reprioritisation.

Prioritisation only works when trade-offs are explicit. Otherwise, capacity is spread too thin and the work that matters most slows down.

“ There is limited capacity and workload visibility.
Work is managed across silos and separate entities. ”
Senior Leader, FMCG

¹⁶EnterpriseWorks ANZ Knowledge Worker Interviews, 2026

29%

do not agree they have clear visibility of their workload and capacity.¹

¹EnterpriseWorks ANZ Survey, 2026

only 53%

only 53% of organisations fully fund identified priorities; about half align budgets with strategy.¹⁹

¹⁹McKinsey, 2024

only 50%

of projects deliver value that exceeds the effort and cost involved.²⁰

²⁰Project Management Institute, 2025

Constant change creates rework, not results

Changes are launched before the previous ones land, building on weaker foundations and delivering less value than promised.

New priorities are added faster than old work is stopped, and teams absorb the shift through rework, duplicated effort and extra coordination.

The leaders we interviewed asked for the same fix: clearer priorities, fewer priorities, and enough time for work to land.

What would most improve your team's ability to deliver meaningful work?

“ Tighter prioritisation, clearer visibility of priorities across teams and reducing the constant change and restructures. ”

Senior Leader, Financial Services

“ Clearer priorities and better communication would help the most, so everyone knows what matters the most. ”

Executive, Technology Industry

49% say changing requirements or priorities often creates rework or wasted effort in their role.¹

¹EnterpriseWorks ANZ Survey, 2026

only 41% of professionals say changing priorities is the single most common cause of project failure.²¹

²¹Project Management Institute, 2021

¹⁶EnterpriseWorks ANZ Knowledge Worker Interviews, 2026

Five shifts that connect strategy to execution

Create clarity, cut the noise

Every report, status update and ad hoc request should help someone decide or act. If it doesn't, stop it and hand the time back to teams.

Choose a few things, go deep

Pick the few priorities that matter most, make the trade-offs clear, and give them time to land. Saying no gives teams the ability to focus and go deep.

One front door, aligned to capacity

Bring all new work through one pathway and prioritise it against capacity. Effective prioritisation upfront enables teams to focus on the highest value work.

Push decisions to the edge

Give every priority one owner, with clear guardrails on who decides and when to escalate, so the people closest to the work can move at speed.

Build a stable system for execution

Constant restructuring destroys momentum. Keep the model simple with a consistent operating rhythm, and flow work through teams.

Connect Systems, Data & AI

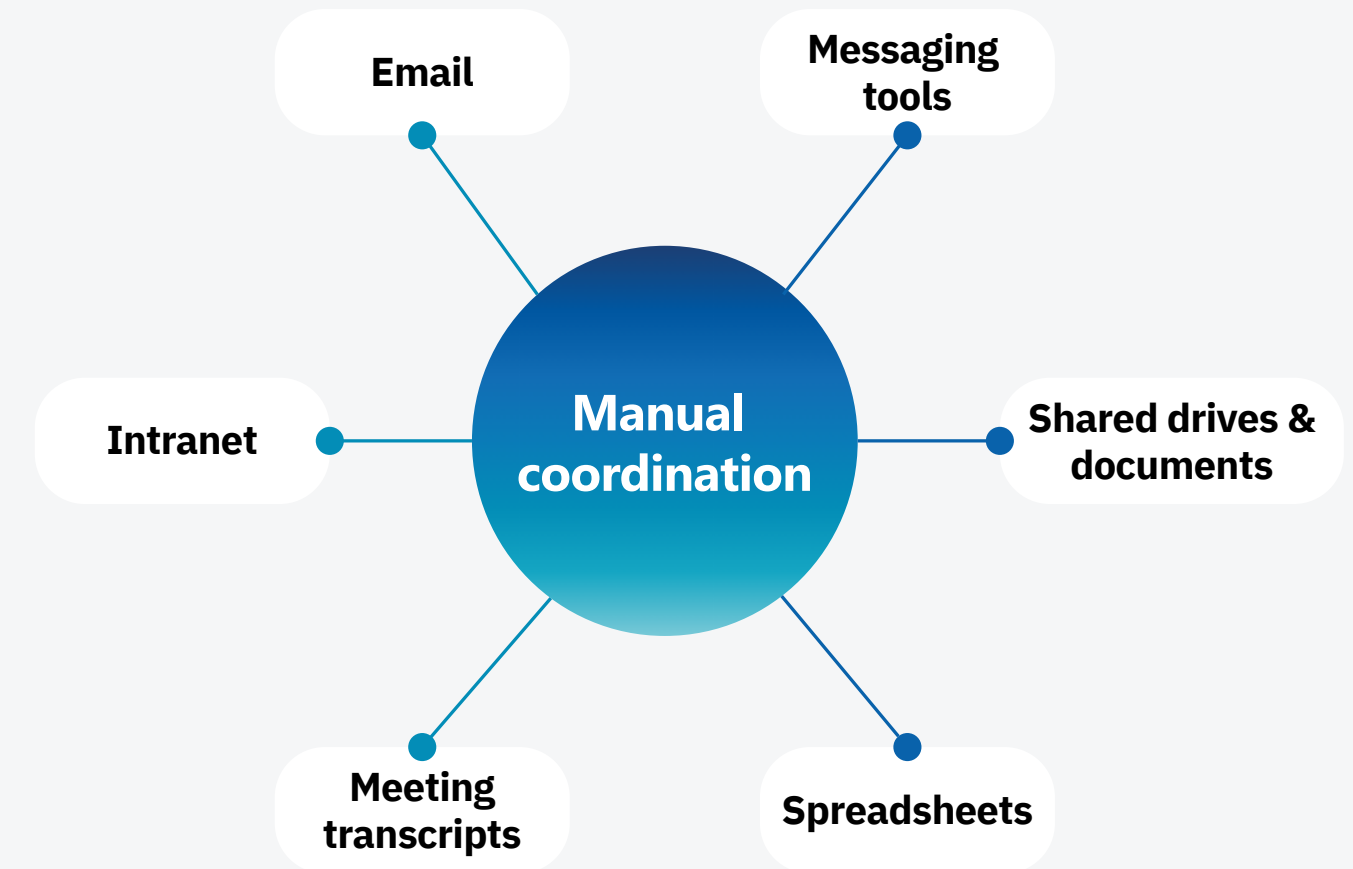
Streamline workflows and connect
core systems, data and AI
capabilities to move work forward.

Disconnected systems create manual work

When systems do not connect, people become the integration layer.

Work is manually coordinated across email, chat, shared drives, spreadsheets and meeting notes, creating separate islands of information.

Lost capacity is only part of the cost. Technology spend rises, manual handoffs increase risk and disconnected systems slow execution.



38%

spend significant time on manual work due to system constraints.¹

¹EnterpriseWorks ANZ Survey, 2026

305 systems

are managed by the average organisation.²²

²²Zylo, 2026

only 15%

of the average \$55.7m annual SaaS spend is directly managed by IT.²²

²²Zylo, 2026

We are reporting on work instead of doing it

When data doesn't flow through technology, people become the integration layer.

Teams spend time piecing together information the organisation already has, with the burden highest for senior leaders.

When people, information and technology are connected, teams have more capacity to focus on the work that matters.

“ Over-reporting is the enemy of productivity. ”

Team Leader, Government

¹⁶EnterpriseWorks ANZ Knowledge Worker Interviews, 2026

42%

spend significant time creating or updating manual reporting and presentations.¹

¹EnterpriseWorks ANZ Survey, 2026

**rising to
62%**

for senior leaders who spend significant time on manual reporting and presentations.¹

52%

of C-suite leaders say ineffective data flows are holding back their enabling functions.²³

²³Thomson Reuters Institute, 2025

AI is helping - but not yet at scale

AI is already helping everyday users automate manual tasks, especially summarising, drafting, meeting support and research.

But the productivity benefit is not yet reaching most workers.
Fewer than half say AI tools are available and actively used in their team.

To scale the value, organisations need to integrate AI into daily workflows and equip people with practical, role-based AI skills.

Where AI is already helping

- Summarising documents and long reports
- Meeting transcripts and action item generation
- Performance review drafting and admin reduction
- Content and presentation generation
- Data analysis and research synthesis

71%

of workers whose teams actively use AI, say it has meaningfully reduced manual work.¹

¹EnterpriseWorks ANZ Survey, 2026

**yet only
48%**

of knowledge workers say AI tools are available and actively used in their team.¹

51%

of frontline employees regularly use GenAI, while more than 75% of leaders and managers use it several times a week.²⁴

²⁴Boston Consulting Group, 2025

Scaling AI is not the same as creating value

Scaling AI is only the first step.

Automation can free up capacity, but saved time does not automatically become value.

For that, organisations need to overcome challenges related to access, data, governance, risk and redesigned work.

The opportunity is to reinvest capacity freed up by AI into higher-value activities and better decisions.

Challenges to address in scaling AI value

- Access to AI tools, and the skills and confidence to use them
- Data silos that AI can't access
- Risk and cultural resistance, especially in regulated industries
- Lack of governance and responsible AI foundations
- Workflows that are not redesigned for human-agent collaboration

46%

of individual contributors have seen AI meaningfully reduce manual work in their role.¹

¹EnterpriseWorks ANZ Survey, 2026

only 30%

of Australian organisations are using AI to deeply transform ways of working.²⁵

²⁵Deloitte, 2026

10%

is the highest reported level of AI-agent scaling in any individual function.²⁶

²⁶McKinsey, 2025

Five shifts to connect systems, data & AI

Simplify and connect core workflows	Simplify core workflows and connect them end-to-end. Every handoff removed reduces re-keying, rework and risk.
One core system for each need	Simplify tools and reduce technology costs by defining one core system for each need, so work is not duplicated or lost between tools.
Connect data into one source of truth	Manual reporting exists when data does not flow into core systems. A connected data layer provides real-time visibility and enables AI.
Focus automation on high-volume manual work	Automate repetitive work that consumes capacity and isn't a good use of your team's capability, so people can shift their skills to higher value work.
Embed AI into daily work and reinvest capacity	Embed AI into daily workflows with the skills and guardrails to use it well, and reinvest every hour it frees into higher-value work.

Evolve Teams & Skills

We need to redefine 'doing more with less'.

Doing more should mean fewer distractions -
and more focus on the work that matters most.

Meetings and low-value work consume the week

Too much of the working week is spent coordinating work, rather than delivering outcomes.

Meetings, messages, status updates and busy work consume capacity, often without improving decisions or outcomes.

Reclaiming time starts with removing low-value activity and protecting the focused work that moves performance forward.

“ Too many low-value meetings which I feel I have to attend to be visible to others.
These meetings do not have any benefit for me personally and take time away from delivering my work, which means I’m often working additional hours. ”

Manager, Financial Services

¹⁶EnterpriseWorks ANZ Knowledge Worker Interviews, 2026

only
44%

agree most meetings are necessary and move work forward.¹

¹EnterpriseWorks ANZ Survey, 2026

46%

of executives say too much busy work is the top drain on productivity.²⁷

²⁷Mercer, 2024

25%

of the working week is lost - mostly due to communication, searching for information and unproductive meetings.²⁸

²⁸APQC, 2021

People leaders are feeling the most pressure

People leaders absorb load from every direction: more meetings, more manual reporting and more rework than any other level.

They are expected to align priorities, manage change, support wellbeing and deliver their own work, while their engagement is falling.

Fewer priorities, clearer trade-offs and less reporting would relieve the layer every other change relies on.

“ Meetings and emails dominate my week, I have lots of stakeholder management. I spend 30% of time pulling together packs and significant time consolidating information from across the business. ”

Senior Leader, Logistics

¹⁶EnterpriseWorks ANZ Knowledge Worker Interviews, 2026

~**20**
hours

is spent in meetings by leaders on average each week, 70% more than team members.¹
**assumes a 38-hour week*

¹EnterpriseWorks ANZ Survey, 2026

57%

of senior leaders and directors report rework - the highest of any level.¹

22%

of managers are engaged globally - down from 27% a year ago, Gallup's largest single-year drop.⁴

⁴Gallup, 2026

AI skills are not keeping pace with adoption

Organisations are rolling out AI faster than they are building the skills to use it.

Expectations of upskilling are near-universal, yet barely a third of people feel properly trained, and in many teams the tools are not yet part of daily work.

The firms pulling ahead are investing in people, building practical skills in the flow of work rather than simply expanding technology tools.

“ What feels risky is not using AI enough. But it is extremely risky to start using AI at scale until processes and data is standardised and cleaned up. ”

Senior Leader, Financial Services

¹⁶EnterpriseWorks ANZ Knowledge Worker Interviews, 2026

39%

of existing skill sets will be transformed or become outdated over the 2025-2030 period, according to World Economic Forum.²⁹

²⁹World Economic Forum, 2025

88%

of employees expect major upskilling for the AI era, but only 36% feel properly trained at this stage.³⁰

³⁰Boston Consulting Group, 2026

over 50%

of Australian directors say AI adoption is moving faster than their organisation can absorb.³¹

³¹AICD, 2026

Without a plan, freed capacity disappears

AI and better ways of working can release real capacity.

But saved time does not automatically become value. It can quickly be absorbed by meetings and low-value work.

Freed capacity should be treated as a performance dividend - deliberately reinvested into priority work, simpler workflows, better customer outcomes, sustainable workload relief and stronger capability.

Practical ways to reinvest capacity

- Keep a prioritised backlog of high-value work ready to go
- Simplify processes and reduce manual work, so gains compound
- Shift capacity toward better customer and stakeholder outcomes
- Protect focus time and sustainable workloads
- Reinvest in capability - practical AI skills and stronger leadership

71%

of workers whose teams actively use AI, say it has meaningfully reduced manual work.¹

¹EnterpriseWorks ANZ Survey, 2026

60%

of leaders already save at least a full workday each week with AI - capacity that has to land somewhere.³⁰

³⁰Boston Consulting Group, 2026

42%

of frontline AI users save a full day a week - but most get no guidance on how to reinvest it.³⁰

³⁰Boston Consulting Group, 2026

Engagement is the engine for performance

Our data modelling identifies 40 factors required to sustain higher productivity, performance, engagement and ROI on technology.

Of the 40 factors, 32 factors lift engagement and every one of those factors has a positive impact on performance - but the reverse does not hold: performance can be lifted in the short term without lifting engagement, but it is unlikely to be sustained without a long-term engagement lift.

The external evidence validates this: engagement is not a soft measure, it is the foundation for higher long-term performance.

23%

higher profitability among top-quartile engaged teams compared with bottom-quartile teams.³²

³²Gallup, 2024

\$10 trillion

annual cost to the global economy from lost productivity due to low engagement, based on Gallup estimates.⁴

⁴Gallup, 2026

No engagement, no uplift

Across the evidence base reviewed by EnterpriseWorks, we found no credible studies showing sustained performance gains without improved engagement.³³

³³EnterpriseWorks, 2026

Five shifts that connect people to performance

Reclaim time for focused work	Create dedicated time for the work that drives outcomes, so people respond to priorities rather than react to demand.
Help leaders guide their teams well	Simpler priorities, less reporting and clearer team rhythms help leaders build high-performing teams.
Build practical AI skills in daily work	Invest in the people using the tools, with practical skills, confidence and guardrails to use AI well.
Reinvest freed capacity deliberately	Direct reclaimed time toward priority work, simpler processes, better service, capability and sustainable workloads.
Lead with engagement and wellbeing	The evidence is clear: sustained performance follows engaged teams. Engagement is not a soft measure, it is a foundation for performance.

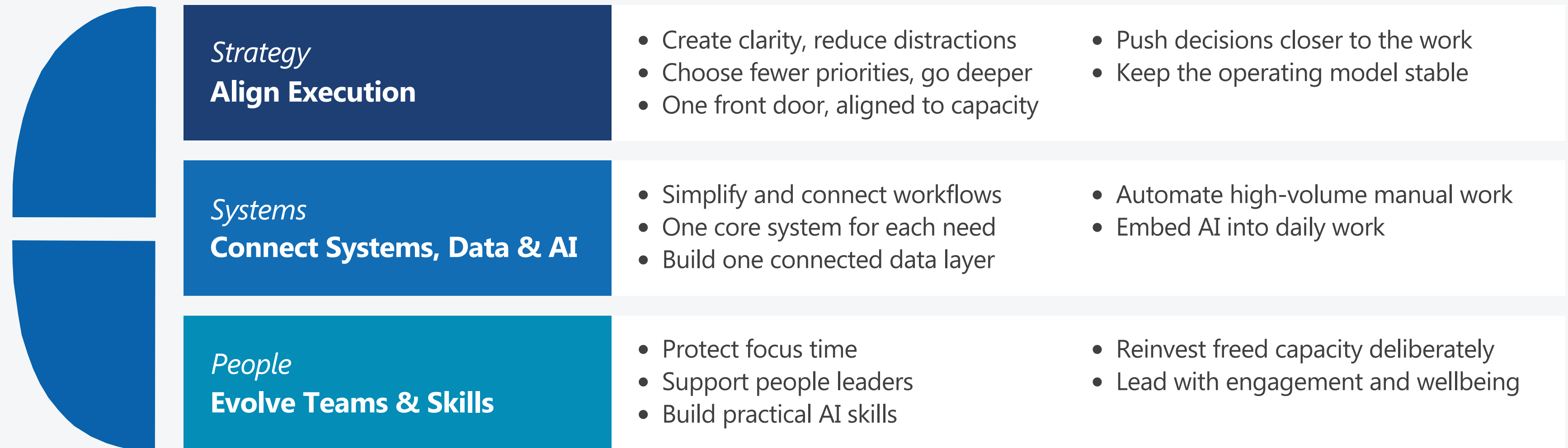
Looking to the Future



A path to a connected and productive future

The path to sustainable productivity growth starts with practical choices leaders can make now.

Each shift is small on its own - but together they compound into an organisation where strategy, systems and people work together to lift performance, strengthen engagement and improve wellbeing.



Who we are and how we help

What we do

We focus on four areas that unlock capacity for growth:

- Lifting productivity without burning out teams
- Connecting strategy to execution
- Designing better ways of working
- Building practical skills

What drives us

Our mission is to build a more productive, connected and sustainable future of work.

We believe better ways of working create stronger organisations, sustainable performance uplift and better outcomes for people.

How we help

We support business, technology, government and industry leaders through:

- Executive advisory
- Research-backed keynotes and education
- Tailored research

Contact us to book an executive briefing or conversation about this research report.

 enterpriseworks.com.au

 contact@enterpriseworks.com.au

Simpler.
More productive.
More connected.
AI-enabled.
More human.



About the Research

ABOUT THE RESEARCH

Independent research, supported by monday.com

This research report is informed by:

- A survey of 385 knowledge workers based in Australia and New Zealand, from large organisations with 500+ employees. Respondents were based in Australia (81%) and New Zealand (19%). Fieldwork was conducted between February and April 2026.
- A review of 125+ global and ANZ research sources, including government, academic, industry and workforce productivity research.
- Senior leader interviews across major industries, including financial services, telecommunications, FMCG, retail, logistics, government, education, media, property, professional services and energy.

The report was also informed by extensive market conversations with Australian leaders, practitioners and technology stakeholders, which helped shape the themes explored in the research.

The research was designed and conducted independently by EnterpriseWorks. Analysis, findings and recommendations are our own.

Thank you to monday.com for supporting this independent research and sharing our aspiration to create a better future of work.

EnterpriseWorks designed and conducted the research independently and retained full editorial control over the analysis, findings and recommendations.



Research Sponsor

monday.com is the AI work platform that not only helps manage and orchestrate work, but also does the work for you. Over 250,000 customers worldwide use monday.com to bring people, workflows, and AI agents together on one flexible platform, where AI doesn't just assist, it executes.

From work management and CRM to service and dev, every monday.com product runs on the same AI layer, automating tasks, running workflows, and helping teams deliver exponentially more with less effort.

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This report is informed by independent survey research, leader interviews, market insight and external evidence. Key sources referenced throughout the report are listed below.

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Research and publication

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