FRONTLINE WORKERS:
HOW TO CONNECT, ENABLE AND SUPPORT THEM IN THE MODERN WORKPLACE

The State of Frontline Work Today

In the last two years, frontline workers have faced more change, turmoil and disruption than ever before. Today, there are still a variety of changes and challenges that face this critical segment of the workforce, from economic uncertainty and inflation to short-staffed teams and burnout.
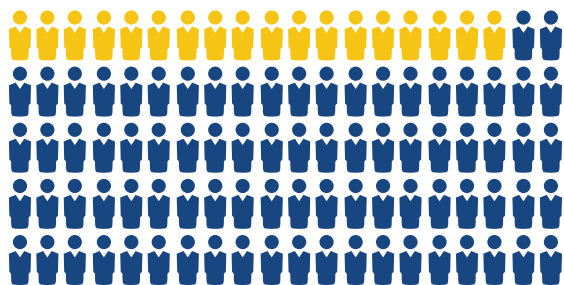
This report is based on the new Lighthouse Research & Advisory Frontline Workforce 2022 research study conducted to understand the sentiment, needs, and priorities of today's frontline workforce. Based on inputs from 3,000 global respondents in frontline positions, it sheds light on the ways employers can support, enable, and retain these individuals.

Let's begin by level-setting on the definition of frontline workers: who are they, and what makes them different from non frontline workers?

Frontline workers are defined as any employee who must be physically present to carry out their role in the organization.

In the last couple of years, work has placed an unbelievable amount of pressure and demand on frontline workers in industries like manufacturing, healthcare, retail, logistics, and other critical sectors.

On a given day, any of us may come across or interact with a number of frontline workers in a number of contexts. It's no surprise that we engage with many of them, since the U.S. Census Bureau estimates that 82% of workers are in frontline positions, and on a global scale, Forbes reports that approximately 2.7 billion workers fall in this category. The vast majority of these individuals hold hourly jobs, and some portion of them is

82%
OF ALL WORKERS IN THE U.S.
census.gov

**NURSE IN A
DOCTOR'S OFFICE**

**CLERK IN THE
GROCERY STORE**

**SERVER IN
A RESTAURANT**

**TRUCK DRIVER
ON THE ROAD**

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2.7 BILLION
GLOBAL WORKERS
Forbes

subject to shift work conditions.

With that in mind, let's explore some of the items that are top of mind for frontline workers today.

Intent to stay: We see in the data that approximately one in four frontline workers has plans to quit their job sometime in the next six months, indicating that the turnover rates many employers have struggled with in recent history won't be stopping any time soon.

Pay pressure: For frontline staff, the number one reason they are quitting their jobs is better pay and benefits, and it's hard to fault them for it. For some positions, the expected wages have increased dramatically in the last year or so.

This wage pressure has actually flipped the script on pay as a reason for quitting jobs. Historically, a job offer with a minimal pay increase might entice someone to leave a job if they weren't particularly attached. However, that would also be weighed against the company culture, a supportive manager, or healthy team relationships, and some workers would choose the latter over a relatively small pay change.

The opportunity to receive a 50% increase in pay, though? It breaks that model, attracting people to jobs they may not have taken without such a large increase. But the research is telling on that front as well. While we see workers at every income level leaving for better pay, we also see across every income level in the data that workers have regret about their job changes. As we've all heard before: money can't buy happiness. And as this report demonstrates, other factors heavily influence someone's satisfaction at work, such as perceptions of fairness and equity, manager relationships, and more. While pay is a big reason for joining or quitting a job, it's certainly not the only variable in the equation.

Stress and burnout: To return to the quitting conversation, the number two reason for quitting among frontline workers is stress and burnout. With viral social media videos showing irate customers blowing up at frontline workers on a frequent basis, it's no wonder. Employers often think about wellbeing when it comes to corporate workers, but frontline staff have those same needs. Eight in 10 workers told us that mental health and wellbeing at work was a personal priority for them.

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While quitting is a major cause for concern for employers, there may be a way to recapture some of those "alumni," workers who previously left the company, because the data indicate that approximately one out of every two people who quit their jobs have regrets that range from missing their old coworkers to greater difficulty finding a new position.

The bottom line is that hiring and keeping frontline workers may be the hardest it's ever been, and employers who don't adjust and adapt their approach may find themselves unable to staff their key positions adequately.

To support that need, we will examine the following critical areas and elements of the employee experience through the eyes of frontline workers:

- **Perceptions of overall employer fairness, transparency, and support**

- **How frontline workers see managers, and why that influences everything else**

- **Technology's surprising impact on employee perceptions of work**

- **Belonging as a critical success factor for frontline worker engagement**

Our goal with this report is to not just highlight data, but also to bring forth practical insights from the research that identify the best ways to support and empower your frontline workers today.

Frontline health and wellbeing: women were 50% more likely than men to say their wellbeing suffered in the last year.

FRONTLINE HEALTH AND WELLBEING:

Women were 50% more likely than men to say their wellbeing suffered in the last year

Employer Perceptions:
Equity, Flexibility, Transparency

Many individuals experience frontline work opportunities in the early days of their careers. Data from the Bureau of Labor Statistics shows that about one in three working teens is employed in the food and beverage industry.

When we talk about employee experience as business leaders, it's easy to picture the perfect stock photo with people working in an open office concept, despite the fact that it's been estimated that 80% of the global workforce doesn't sit at a desk.[1] While they have different surroundings, they still need the same kinds of things that other workers need to succeed at work: flexibility, equity, transparency, and so on. While it might be easy to separate these conversations and assume they only apply to corporate or non frontline staff, the truth is that they matter deeply to frontline workers as well.

While we have an entire section on technology for the frontline employee experience later in this report, it's important now,because of the correlation between access to the right technology and perceptions of workplace fairness, transparency, and more.

In the study, we asked if frontline workers have the right tools and technology that they need to do their job well. Nearly six in 10 employees affirmed that statement, and how they reacted to that question fundamentally influenced a variety of other responses throughout the study.

For instance, in the research, we see that more than one third of frontline workers say that they don't get as much support and appreciation as non frontline staff, but that varies dramatically depending on the environment and resources they are provided.
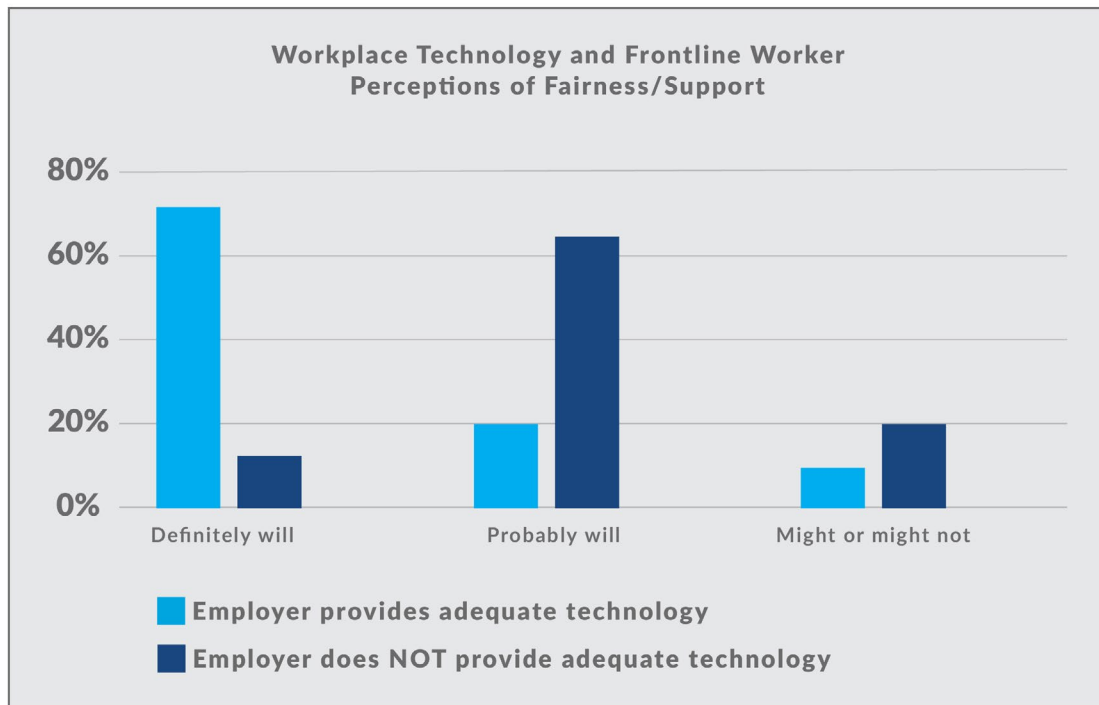
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1. http://desklessworkforce2018.com/

3X MORE LIKELY
If a frontline worker doesn't think their employer offers them the right tools and technology, they are three times more likely to say that they aren't getting equitable treatment with other workers.

Figure 1: Solutions to Today's Tight Talent Market

**Workplace Technology and Frontline Worker
Perceptions of Fairness/Support**

Legend:
- Employer provides adequate technology
- Employer does NOT provide adequate technology

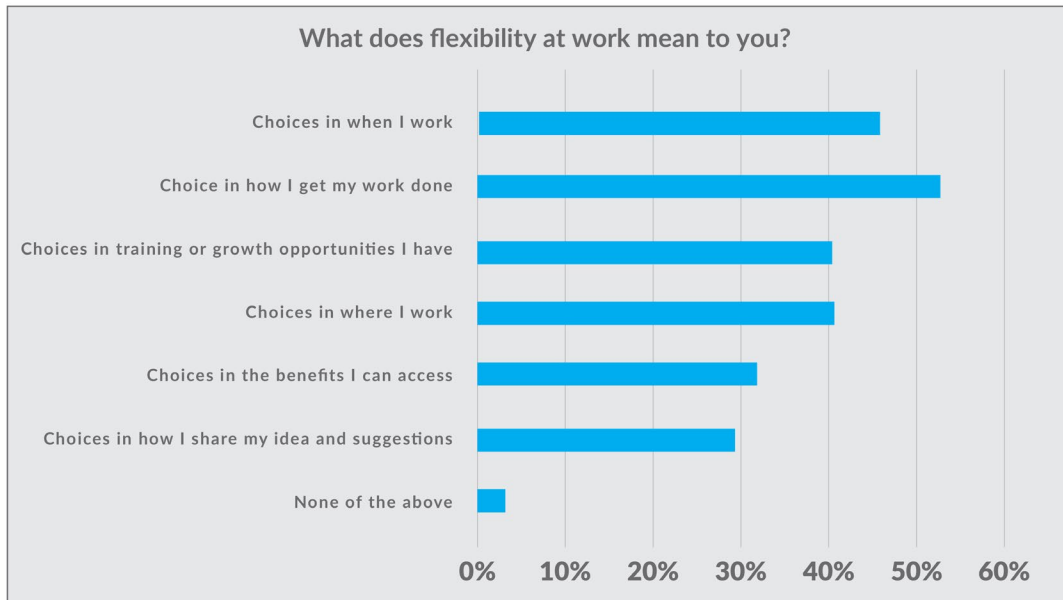*Source: Lighthouse Research & Advisory Frontline Workforce 2022 (n=3,000)*

Logically, this makes sense, but the difference in response rates is pretty astounding. If a frontline worker doesn't think their employer offers them the right tools and technology, they are three times more likely to say that they aren't getting equitable treatment with other workers.

In addition, one area that's critical to spotlight with regard to frontline workers is flexibility. In the last few years, many discussions of workplace flexibility have all but ignored the needs of frontline staff in favor of discussing remote and hybrid strategies for office-based workers. While focusing on that aspect of flexibility isn't inherently bad, it likely impacts the previously mentioned perceptions of workplace fairness by making frontline individuals feel out of the loop.

To get a different perspective, we asked frontline employees to tell us what flexibility at work meant to them, offering a range of choices and options.

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Figure 1: Solutions to Today's Tight Talent Market

What does flexibility at work mean to you?

Category	Value
Choices in when I work	~46%
Choice in how I get my work done	~53%
Choices in training or growth opportunities I have	~41%
Choices in where I work	~41%
Choices in the benefits I can access	~32%
Choices in how I share my idea and suggestions	~30%
None of the above	~3%

Lighthouse Research & Advisory 2022 Talent Acquisition Trends Study (n=1,000)

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For these individuals, having some flexibility in scheduling when they work is the most critical aspect of flexibility overall. Right behind that, though, is flexibility in how work gets done, which is another way to describe autonomy. Autonomy is about having a bit more control in the choices and decisions we face day to day, and for frontline staff, it's a way for them to appreciate workplace flexibility.

While many times frontline workers are shut out of workplace flexibility discussions through no fault of their own, it's our hope that this data will help to shed light on how employers can embrace flexibility, even if they operate in an inflexible industry that doesn't support more traditional definitions of flexibility (such as work from home).

One part of making flexibility work is a willingness to be open with staff about what options exist. However, four in 10 frontline workers said their employer "isn't fully open and transparent as it could be." It's incredibly difficult to build trust between any two parties, especially in an employment relationship, when there is a perception that one party is withholding information from the other, or that the employee's voice doesn't count.

We'll close out this section with a data point on transparency. Similar to above, if we segment that question by those workers who feel their employer has given them access to the right tools and technology they need to do their job, the answers vary dramatically.

Frontline staff are 1900% more likely to say their employer is not open and transparent if they don't have access to the right technologies to do their work.

The takeaway for us is that each of these facets of someone's work experience is interconnected with others. As we can see, for many frontline workers, technology plays a critical part in how they see, experience, and perceive work overall. But that's not the only element that matters. In the following section we will dive into the manager's role and their ability to either make or break someone's ability to connect, engage, and perform at work.

FRONTLINE WORKERS

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Manager Sentiment

Have you had an incredible manager who supported, praised, and encouraged you on a regular basis? If so, you know how powerful that can be.

There's a long history of research that shows a manager's influence on someone's satisfaction on the job, but we were eager to examine that relationship through the lens of the frontline worker. Does it matter more, less, or about the same for one of these individuals compared to the non frontline workforce?

The first thing we uncovered was a relationship between understanding and perceptions of support. Frontline workers who have a manager who understands them are dramatically more likely to feel supported by that same leader.

Figure 1: Solutions to Today's Tight Talent Market

Do you feel supported by your manager?

Source: Lighthouse Research & Advisory Frontline Workforce 2022 (n=3,000)

FRONTLINE WORKERS WHO HAVE A MANAGER WHO UNDERSTANDS THEM ARE DRAMATICALLY MORE LIKELY TO FEEL SUPPORTED BY THAT SAME LEADER.

IT'S VIRTUALLY IMPOSSIBLE, STATISTICALLY, FOR MANAGERS TO SUPPORT FRONTLINE WORKERS WHEN THEY DON'T UNDERSTAND THEM.
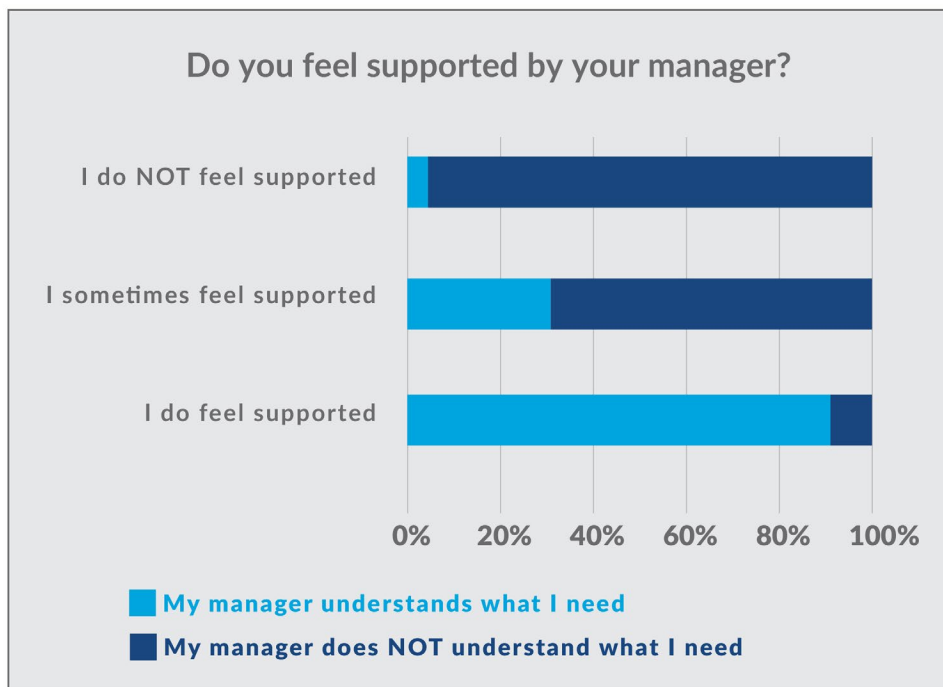
A SUPPORTIVE MANAGER CAN IMPROVE A FRONTLINE WORKER'S CHANCES OF STAYING AT THE COMPANY BY 300%!

Another way of putting this: it's virtually impossible, statistically, for managers to support frontline workers when they don't understand them.

In the raw data, 57% of workers said that their manager regularly supports them, and 80% of those workers were happy in their job. But when we look at the workers that say their manager doesn't consistently support them, just 20% of them were happy in their job with no plans to quit. A supportive manager can improve a frontline worker's chances of staying at the company by 300%!
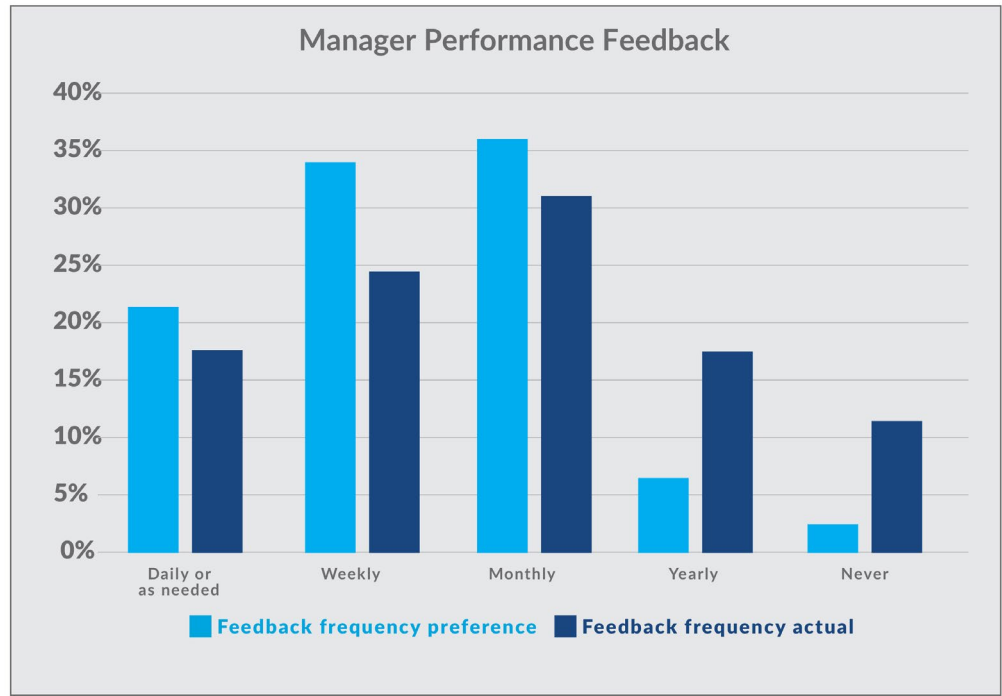
Speaking of understanding and support, a big part of that comes from regular interactions with their team members. For those workers that don't have a supportive leader, we asked about ways to change that relationship. The number one priority for workers was a manager that gave them recognition for doing good work.

With the steady evolution of performance management in the last five years to a more continuous cycle, we know that a steadier and more consistent pace of feedback is important for enabling better worker performance, and the workforce knows it, too.

Unfortunately, frontline workers told us in the study that there were some gaps in how often they preferred to get performance feedback from their manager and what happened in reality.

Many times employers ask about what is the "best" frequency for giving feedback to employees. As the data below indicate, there's not a single best or most preferred frequency. What matters more is alignment: aligning the feedback frequency with what the employee expects.

Figure 1: Solutions to Today's Tight Talent Market

Source: Lighthouse Research & Advisory Frontline Workforce 2022 (n=3,000)

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The way psychologists describe the phenomenon of a misalignment between expectation and reality is called "expectation violation," which essentially occurs when someone's expectations are violated because they get something different than what they hope to receive.

This is more than just an interesting callout. To compare, for frontline workers who expect daily or weekly feedback and receive daily or weekly feedback, just 15% of them have plans to quit their job. Those frontline workers who expect daily or weekly feedback that get it monthly or less frequently are two and a half times more likely to have plans to quit their job.

The key takeaway for employers is that managers who interact with frontline workers hold incredible power to create feelings of connection and support. Their support (or a lack of it) impacts a person's sense of belonging, intent to stay, and a host of other relevant factors. In the final section we'll explore the role of HR technology in the life of a frontline worker and where that can help to support a sense of belonging and intent to stay.

FRONTLINE FEEDBACK
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Technology as an Employee Experience Enabler

Pick any type of frontline worker:

- **A person from the cable company working on an installation issue**

- **A nurse caring for a patient in a clinical setting**

- **A line worker operating machinery in a manufacturing operation**

In these scenarios, it's easy to imagine that they are separated from the HR technology that has made its way into the hands of corporate staff and desk workers over recent years. However, that's not always the case.

With mobile apps and technology improvements, many HR applications are now available to anyone with an internet connection, even on a mobile device or in a workplace kiosk. That can include tools like:

- **Mobile apps for clocking in or checking pay stubs**

- **Scheduling tools for checking or changing shifts**

- **Or online training courses and content**

Frontline workers that said their employer gives them the right tools and technology feel a fundamentally different level of support, as the data below indicate. While it would seem like something broader like perceptions of employer transparency would be a separate issue, the workforce doesn't feel the same way. Their holistic employee experience drives their perceptions and feelings of the work environment, and enabling them with the right tools helps to influence their feelings of support from the company.

FRONTLINE HEALTH AND FLEXIBILITY

Workers who have flexible scheduling tools at their disposal are 71% more likely to say their company is open and transparent.

*Figure 5: Frontline Employee Perceptions of Transparency When
Offered Helpful Tools to Manage Their Work Life*

Transparency Perception and Specific Employee-Focused Tools
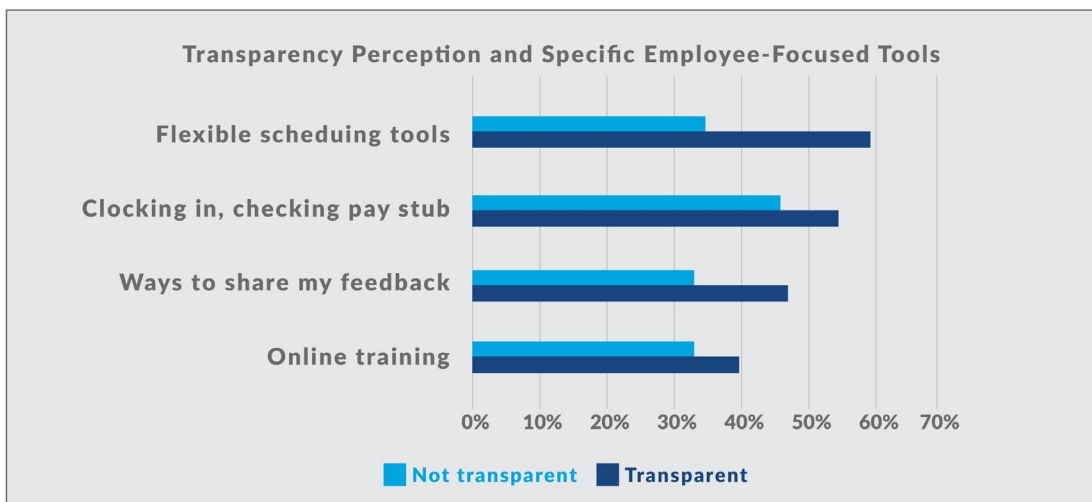
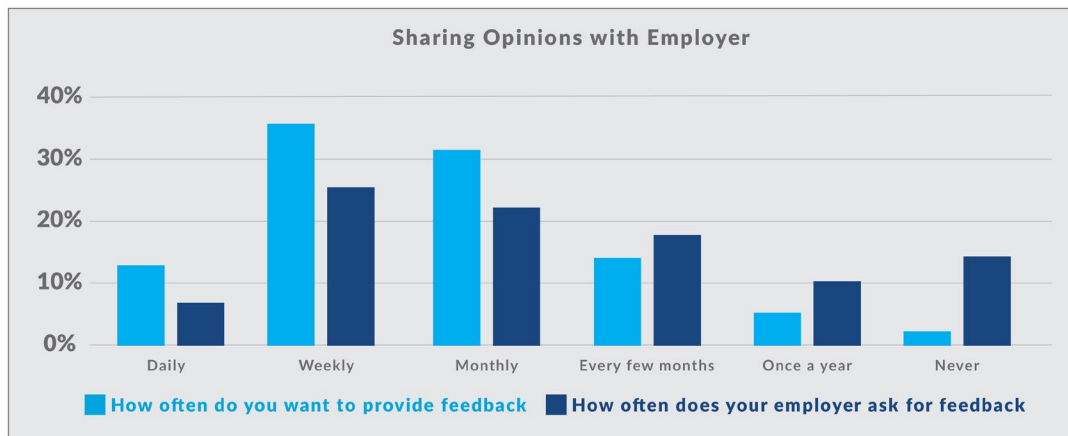*Source: Lighthouse Research & Advisory Frontline Workforce 2022 (n=3,000)*

Additionally, we saw that frontline workers primarily evaluate flexibility based on when they work, which aligns with the number one finding here. Workers who have flexible scheduling tools at their disposal are 71% more likely to say their company is open and transparent.

It's a powerful indicator, and there were multiple throughout the dataset, that someone's feeling about work are driven by a series of touchpoints and components. Yes, managers and how they treat someone definitely play into this equation. But so, too, does the investment companies make into their staff.

One topic that we explored more deeply is this area of soliciting employee feedback, and the findings here were similar to those with manager performance feedback. The alignment of preference and reality plays a real part in how someone feels about the company.

Figure 6: Frontline Employee Preferences on Sharing Feedback with Employers

Sharing Opinions with Employer

■ **How often do you want to provide feedback**   ■ **How often does your employer ask for feedback**

Source: Lighthouse Research & Advisory Frontline Workforce 2022 (n=3,000)

While this looks like a relatively close match (no set of answers has more than 10-12% deviation between expectation and reality), diving into the specific answers sheds some light on how important this practice is.

Employees who are solicited for feedback by their employers monthly or more frequently are 2.3x less likely to say they have plans to quit than those employees who are asked annually or never.

Frontline staff who are solicited more frequently are 2.5x more likely to say they "definitely would recommend" their employer as a place to work compared to those infrequently asked for feedback.

It all comes down to whether this is a one-way relationship or more of a two-way conversation. If employees feel like they don't have their chance to share, they will start to withdraw from their work, hold back their best ideas, and reserve them for their next employer. We see this in our learning research: when someone is planning to stay in a job, they want to take training that develops the skills they need to succeed in their current role. When they decide to quit, they begin prioritizing training that will help them succeed in their next company/role.

Business leaders that prioritize the attraction, engagement, and retention of their frontline workforce have to be willing to put the right tools and technology into the hands of these individuals if they want to create strong, connected work relationships.

Workers who say their wellbeing/health has suffered are 4x more likely to say their employer never asks them for feedback or input.

FRONTLINE FEEDBACK

Workers who say their wellbeing/health has suffered are 4x more likely to say their employer never asks them for feedback or input.

Workplace Belonging: A New Perspective

We all want to belong. It's an innate human desire to feel connected and part of something, and that's true for frontline workers just like it is for any other human. One scientific definition of belonging is "feeling accepted, respected, and appreciated."

Within the context of this study on frontline workers, we asked a question about the person's perceptions of belonging at work. We segmented workers into two groups on that belonging spectrum based on their response: High Belonging and Low Belonging. When the other questions in the study were put through that analysis, the results were staggering.

For instance, we see that High Belonging workers have a close alignment of manager performance feedback frequency with their expectations. However, we also see that these individuals are **nine times** more likely to have a supportive manager overall, and 79% of them have no plans to leave their employer.

Conversely, Low Belonging workers have a misalignment between manager feedback frequency as well as the frequency with which they are allowed to give feedback to their company. They are also **four times** more likely to say their mental health and wellbeing has declined in the last year, and just 33% intend to stay with their current employer.

Belonging is a complex, complicated, and deeply personal concept. What works for one person to feel connected may not work for another person. But with companies struggling with hiring and retention, there's a clear benefit: High Belonging employees are more than twice as likely to stay with their employer. In addition, frontline workers with a High Belonging score are **five times** more likely to say they would recommend their employer as a great place to work.

When we look at some of the components correlated with a high belonging score, we see some opportunities for employers to create a greater sense of connectedness with and among their frontline workforce.

- **Putting the right tools and technology into their hands so they can manage their experience at work**

- **Selecting and developing high-quality people managers to serve their teams**

- **Confirming with executive leadership that employee feedback is a valuable mechanism for understanding challenges and opportunities that workers have**

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Figure 7: How Belonging Connects Across the Frontline Worker Employee Experience

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Q: I feel accepted, respected, and appreciated at work.	High Belonging Score	Low Belonging Score
Manager feedback/ frequency	**CLOSE ALIGNMENT** with employee preference and reality	**MISMATCH** between employee preference and reality
Employer feedback/ frequency	**CLOSE ALIGNMENT** with employee preference and reality	**MISMATCH** between employee preference and reality
Perceptions of personal health/wellbeing decline in last year intelligence	**12%**	**52%**
Perceptions of equitable frontline worker experience	**73%**	**17%**
Employer provides the right tools/technology to manage work	**80%**	**22%**
Employee has a manager who understands them	**90%**	**22%**
Employee has a manager who supports them	**82%**	**9%**
Perceptions of employer being open and transparent	**69%**	**9%**
Plans to stay at the organization instead of quitting	**79%**	**33%**

Source: Lighthouse Research & Advisory Frontline Workforce 2022 (n=3,000)

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Key Takeaways

1

CRITICAL NATURE OF FRONTLINE WORKERS:

Many portrayals of frontline staff show them at the bottom of the organizational hierarchy. Yet paradoxically, many employers over the last year have realized that not having enough of these staff is an operational issue that affects business outcomes. Determining to offer flexibility in meaningful, desirable ways to meet the needs of the frontline workforce is a powerful talent attraction and retention strategy.

2

NECESSITY OF SUPPORTIVE PEOPLE LEADERS:

The data clearly show that supportive, understanding people leaders are a key differentiator in the work experience for frontline individuals. Employers that are willing to select and hire people leaders based on their willingness and ability to serve their team members will achieve the best possible outcomes with regard to retention and engagement.

3

ROLE OF TECHNOLOGY IN ENABLING FRONTLINE WORKERS:

While frontline staff were historically unable to utilize some HR technology applications, increasingly that barrier is disappearing. That means companies who can put those tools and technologies into the hands of workers will be able to reshape expectations and increase perceptions of fairness and transparency, all while enabling staff to manage their work lives in a seamless manner.

4

BELONGING AS A BUSINESS STRATEGY:

Every day business leaders proclaim support for diversity, equity, inclusion, and belonging efforts. Yet it's often difficult to determine how to increase someone's sense of belonging at work in a meaningful way. The data clearly indicate just how strong belonging's influence is on a frontline worker's overall perception of work, and innovative business leaders will continue to advance the idea of belonging as a business strategy that drives critical results.

Survey Audience

- 3,000 responses | 2,000 US | 1,000 (Australia, Canada, China, UK, Ireland, India, New Zealand)

- Industries: construction, oil/gas/energy, hotel and food service, manufacturing, retail, healthcare and transportation/warehousing

- Gender: 44% male, 56% female

- Age: 18-24: 12%
         25-34: 27%
         35-44: 30%
         45-54: 19%
         54+: 11%

About Workday

Workday is a leading provider of enterprise cloud applications for finance and human resources, helping customers adapt and thrive in a changing world. Workday applications for financial management, human resources, planning, spend management, and analytics have been adopted by thousands of organizations around the world and across industries – from medium-sized businesses to more than 50% of the Fortune 500. For more information about Workday, **visit workday.com.**

About Us

Lighthouse Research & Advisory is a modern analyst firm dedicated to setting the standard for excellence in talent, learning, and HR. By providing compelling research and actionable insights for business leaders, our team's mission is to navigate the rapidly changing field of human capital management to support today's talent and learning functions.

Our advisory, research, content, events, HR Awards Program, and other offerings serve tens of thousands of employers across the globe every year.

Put simply: our goal is to chart a new course for talent. We do this with compelling research, innovative ideas, and a strong grasp of the current state of talent and technology at work. We have supported hundreds of organizations with our research, advisory, and insights since our beginning in 2016. In addition, our data also inform key product and strategy decisions at the industry's leading technology and service providers.

Ben Eubanks is the Chief Research Officer at Lighthouse, providing trusted advice for today's modern talent leaders. Prior to joining Lighthouse, Ben worked as a research analyst and an executive practitioner. His analyst work focused on learning, talent acquisition, and talent management. During his career, he has published more than 100 pieces of research and provided advisory services to executives from some of the largest and most respected organizations in the world.

Unlike most analysts, he also has hands-on experience working as an HR executive, leading both strategic and tactical talent practices. Ben is the host of We're Only Human, a podcast focused on the intersection of people, technology, and the workplace. In addition, he runs upstartHR.com, a website serving HR leaders that has reached more than 1,000,000 readers since its inception.