

Frontline Workforce Pulse Report 2024

Bridging critical disconnects
between deskless workers
and management.



BEEKEEPER

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Welcome and thank you for reading the 2024 Global Frontline Workforce Pulse Report

In September 2023, Beekeeper conducted the third annual Frontline Workforce Survey to learn about the motivations, stressors, and productivity of workers, managers, and corporate staff in key frontline industries.

Frontline workforces power the world's businesses. They serve, build, and operate industry organizations and processes around us. With their hard work, skill, and commitment to doing a great job, frontline teams provide vital services and drive business growth and profitability. However, as our report will demonstrate, frontline workers' will and ability to succeed has been under siege for several years.

Disconnected, discontented, and demotivated:

Frontline workers are leaving their jobs in droves, harming business operations and impeding growth with their attrition. Survey results found that managers and headquarters (HQ) leaders are failing to address the needs and concerns of their frontline employees. These disconnects cost firms billions of dollars in lost productivity, staff attrition, and diminished profitability globally.

However, corporate leaders can – and should – address the factors that create worker disengagement to create a healthy workplace that attracts, retains, and develops staff.

This report recommends how they can do so.

Join our journey to understand and engage Frontline Workers

Key facts and methodology

Our report is one of the largest cross-industry multi-role frontline worker survey of its kind, with over 8,000 responses across EMEA and the USA.

Uniquely, we surveyed across three key personas: workers (individual contributors), managers working on the frontline, and also their colleagues working in the head office.

2.7 Billion Frontline Workers

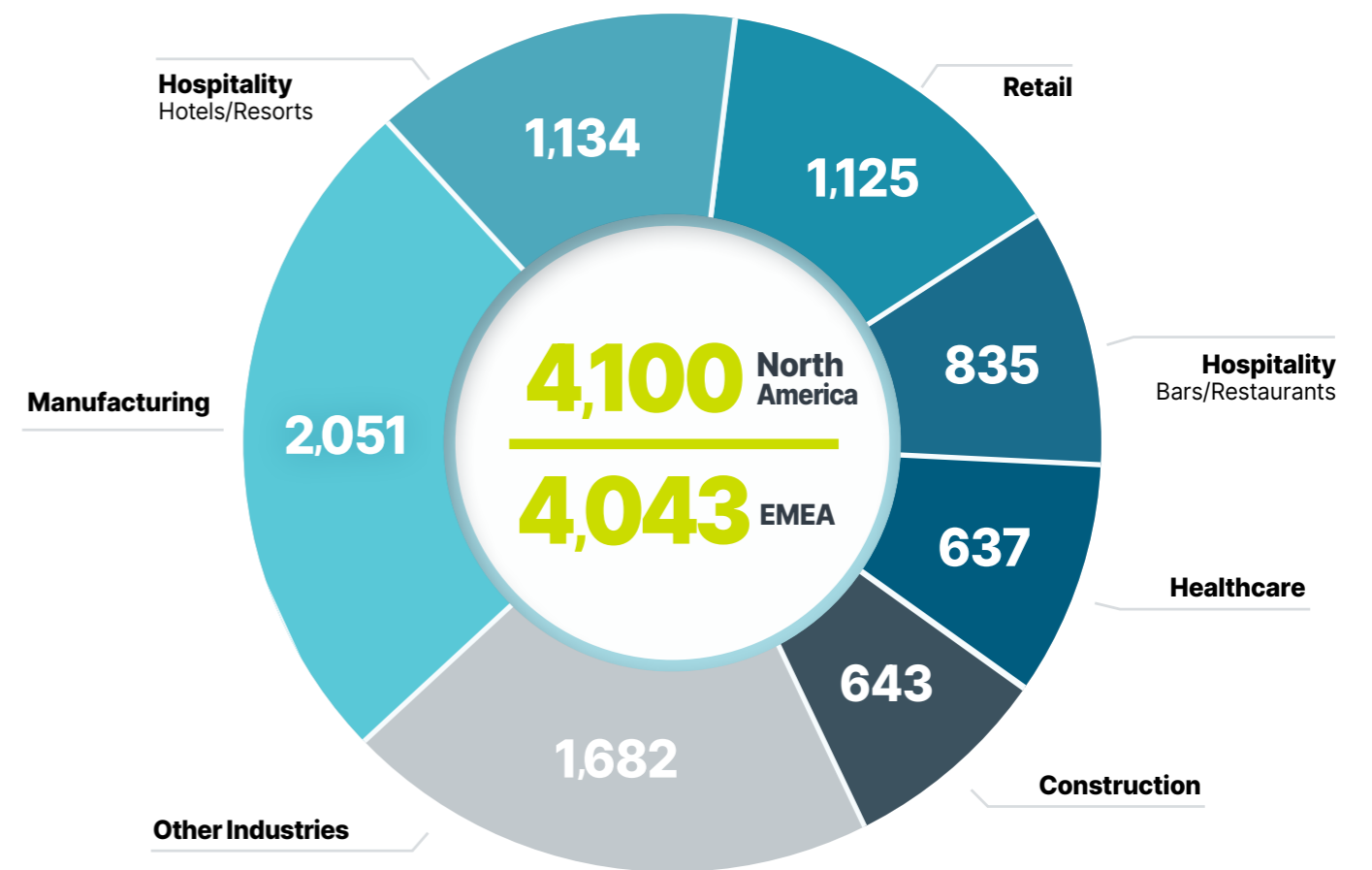
A frontline worker is someone who performs essential tasks directly with the public or in physically demanding environments, often without the protection of a desk job. They

are the backbone of everyday life, keeping essential services running and goods flowing. Think of it this way: if they stopped working, our daily routines would grind to a halt.

Responses from key personas



Responses by industry



Getting to the heart of the disconnect

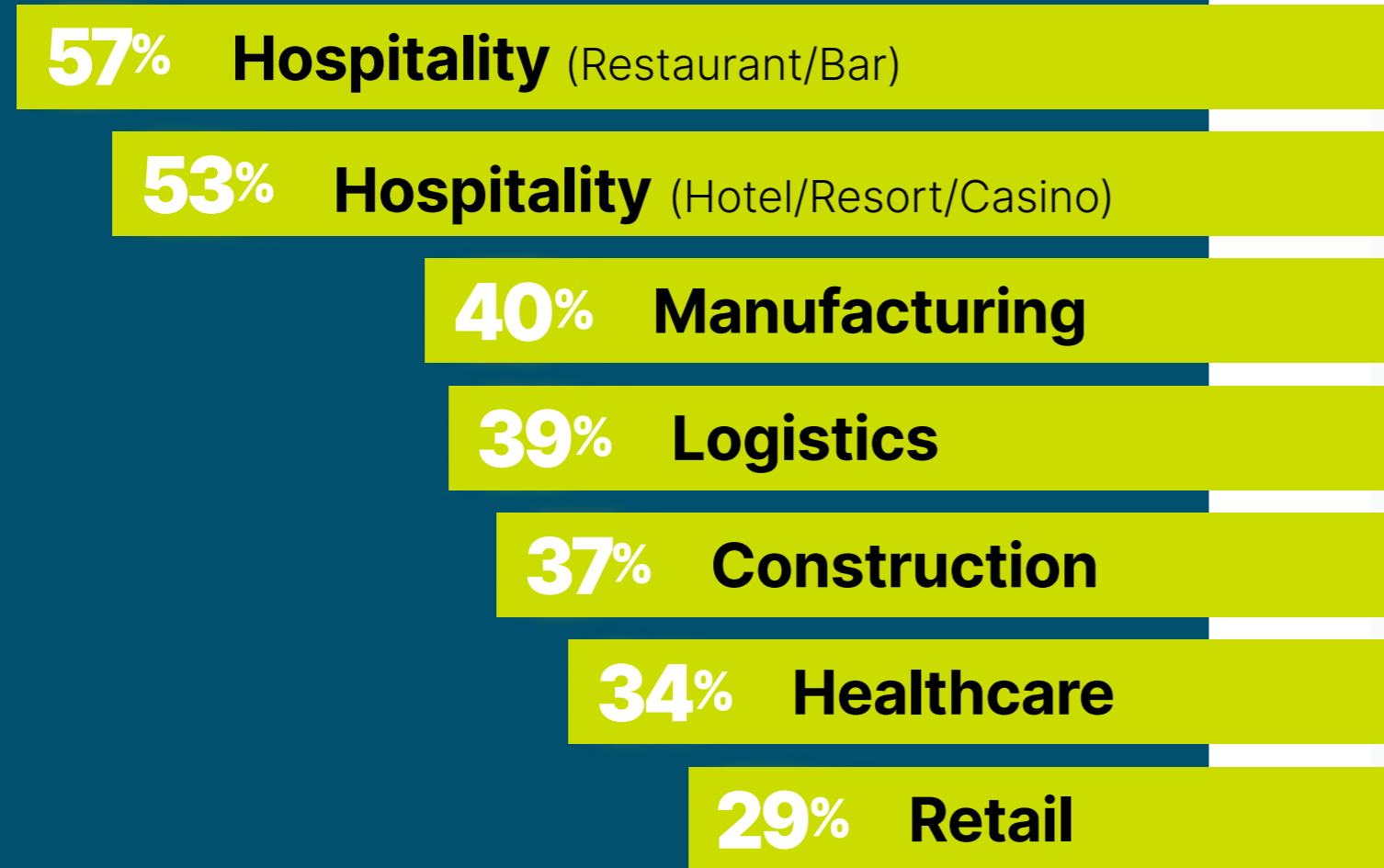
The survey not only asked workers, managers and HQ staff about their **personal stress, motivation, and productivity sentiments**, we also asked managers and HQ staff what

they **expected** their workers to be thinking: revealing the topics and situations where the disconnect between workers and their leaders is most severe.

Insight No.1

Disengaged Frontliners are leaving in droves

Percentage of workers who changed jobs in the past 12 months



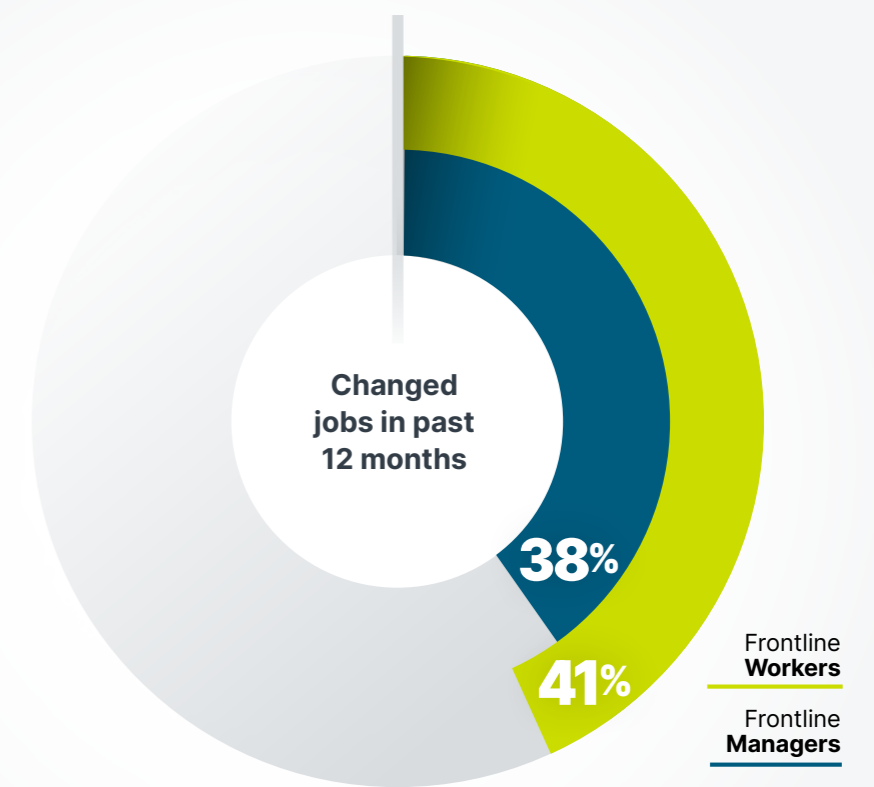
Want to retain your most valuable frontline talent in 2024?

While fair pay is a must, frontline workers want their employers to provide a friendly and safe environment, engage them and acknowledge their efforts, and offer fulfilling jobs with a future.

Even as the world moves on from the pandemic, frontline workforce issues persist. Workers are often overworked, unhappy, and disconnected from corporate priorities. **Demotivated and fed-up frontliners are voting with their feet.** While recent media headlines have focused on frontline worker

pay increases, our survey found that they're still departing jobs at a rate of 35%-50+, harming companies' top and bottom line results. The situation is particularly severe in Hospitality, but no frontline sector is unaffected by high attrition.

Frontline worker attrition is reaching 35-50% in most industries.



So, what do workers want? More than just fair pay, it turns out.

Frontline workers want a friendly, fun workplace, better shift staffing to prevent overwork and burnout, and recognition for a job well-done. In addition, today's frontline teams appreciate and seek greater opportunities to leverage technology that helps them execute daily processes more easily, in addition to learning and developing their skills on the job.



“

We simply need adequate levels of staffing and **better communication about our daily work goals.**

Frontline Worker, Hospitality

”

Insight No.2

The great resignation is here to stay, and it's not just about money

Across industries and roles, frontline employees are leaving. Workers cite wages and pay (38%), work/life balance (34%), and better prospects (24%) as the top reasons why they're departing. For many employees, excessive work demands, coupled with understaffing and customer behavior, have contributed to creating a toxic workplace environment.





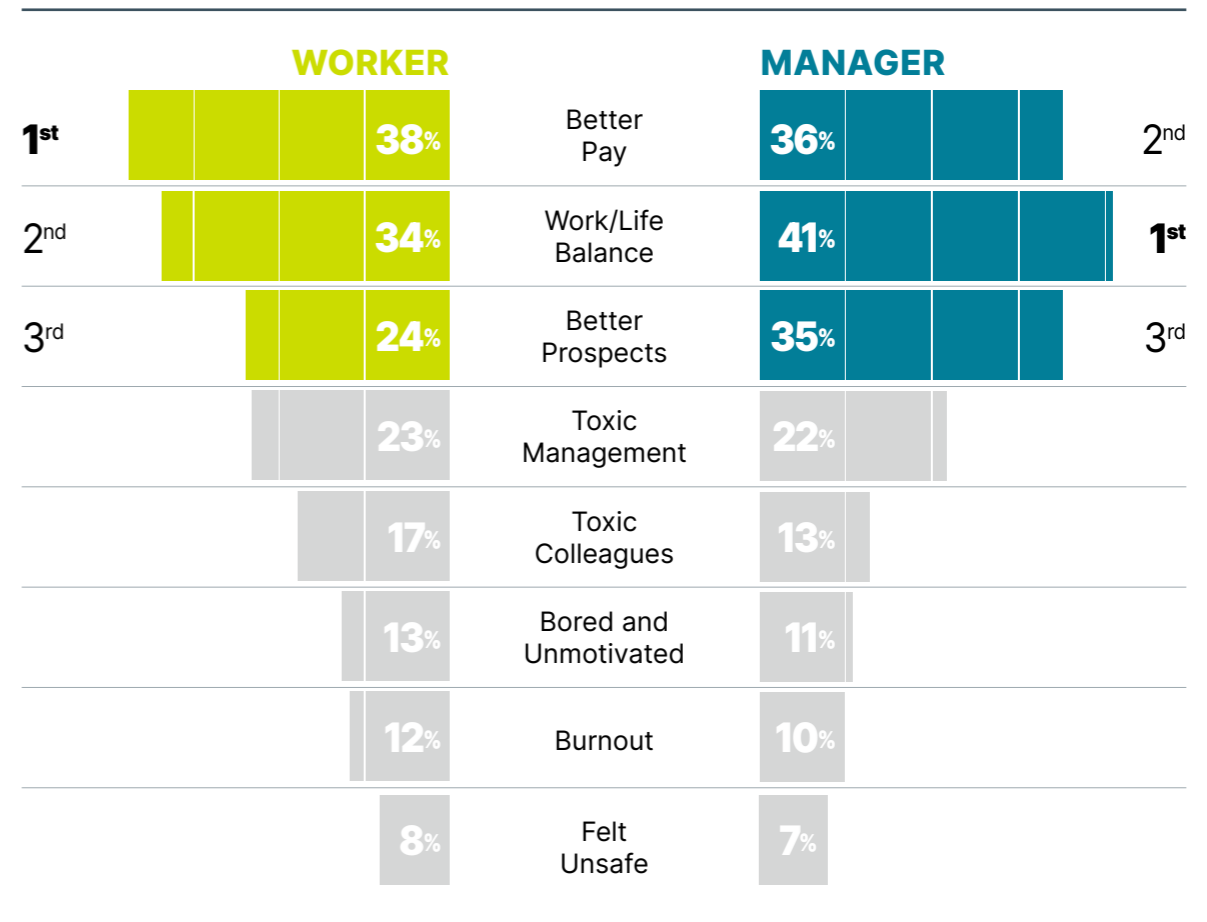
“ I’d love top management to get a first person view of how difficult the tasks that they simply expect to be completed truly are, and how much harder they can become when we are understaffed and overworked. ”
 Frontline Worker, Hospitality

During the pandemic, workers departed for jobs with better salaries and more favorable working conditions. That trend has continued as many workers seek a respite from the impact of rising inflation and unreasonable management expectations.

Managers are also burned out by being caught between unreasonable leadership expectations and overworked, unhappy, demotivated workers. As a result, they cite work/life balance as their #1 reason for leaving jobs (41%), followed by better pay (36%), and better prospects (35%).

With the recent market trend of raising pay, both **workers and managers feel that they can find better jobs and compensation elsewhere.** They’re also tired of overdelivering and sacrificing personal time off, when key operational problems continue to go unfixed for years.

Why did you quit your last job?



Frontline workers and managers who switched jobs in the past 12 months were given the same set of options to choose from, and results showed an alignment in their top 3 reasons.

“

We need better remuneration, improved leadership and more room for personal development.

Frontline Worker, Retail

”



“

Unfortunately my workplace has become very toxic and there is limited communication.

I used to enjoy learning new things. Now it's just a paycheck.

Frontline Worker, Hospitality

”

BEEKEEPER RECOMMENDS

Reduce resignations:

Minimize attrition of your key frontline talent

- ✔ Offer **pay, benefits, and recognition that match fairly** with the hours worked and the performance delivered.

- ✔ Establish a **workplace that's engaging**, friendly and welcoming, and clearly safe and secure.

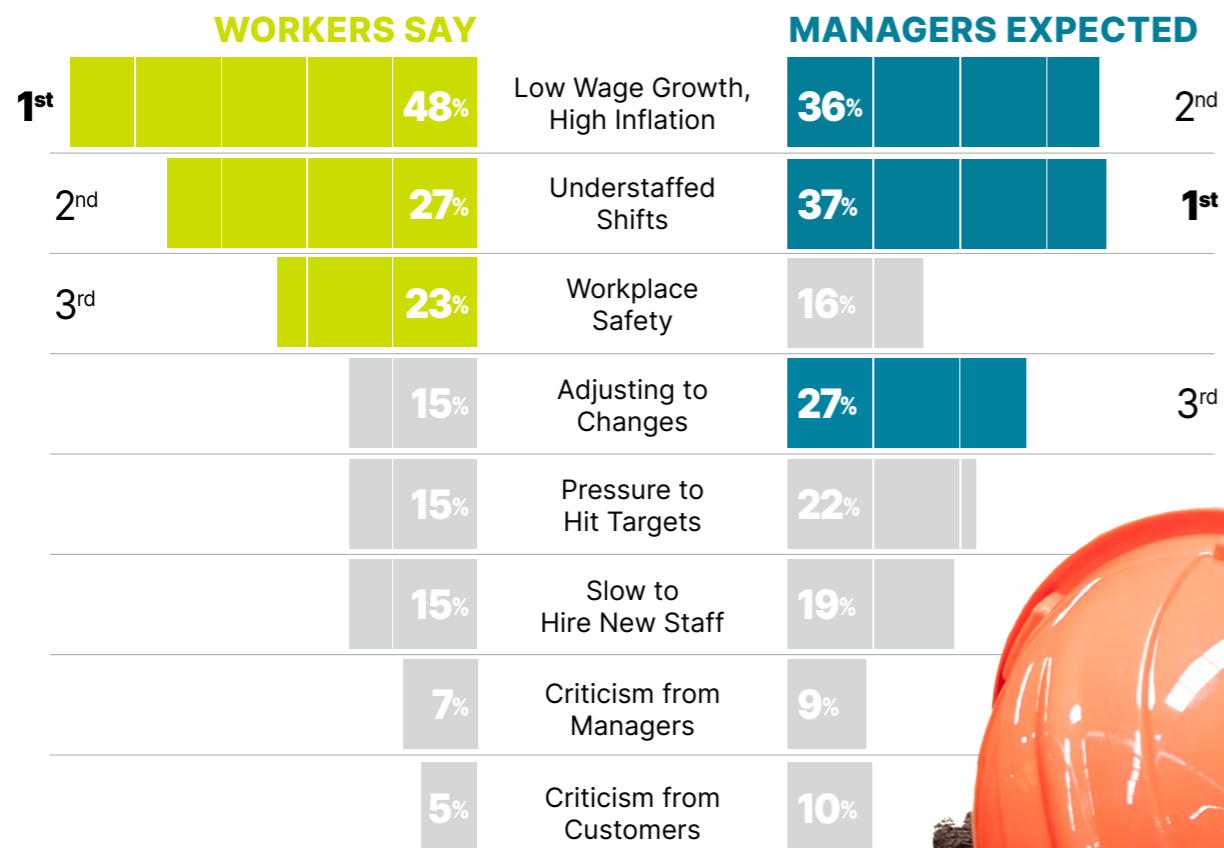
- ✔ Ensure your choice of **digital HR and productivity tools and communication are 'frontline first'**, and fit seamlessly with your workers lives and daily tasks.

Insight No.3

Frontline stressors are growing – with no end in sight

Fast-rising inflation has caused a surge in workplace stress.

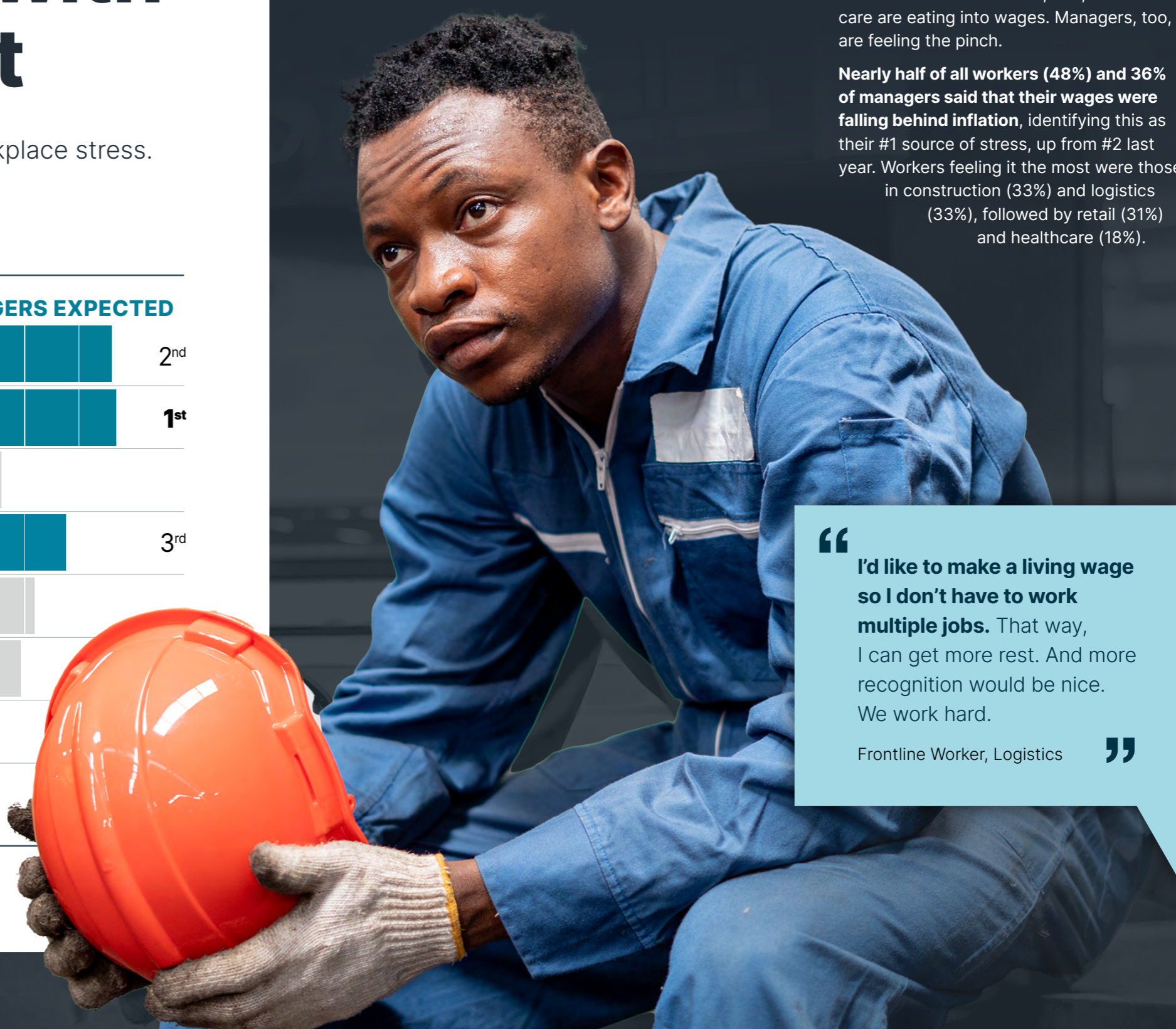
What stresses you at work?



Evidence of disconnect: Frontline workers selected up to three options from the list. Frontline managers were given the same options, and asked how they expected their teams of workers would answer.

Frontline workers and managers have been buffeted by inflation. Global inflation rates peaked in 2022 at 8.7% but have remained high at 7% in 2023, outpacing most workers' pay increases. Meanwhile, the cost of goods and services such as food, fuel, and child-care are eating into wages. Managers, too, are feeling the pinch.

Nearly half of all workers (48%) and 36% of managers said that their wages were falling behind inflation, identifying this as their #1 source of stress, up from #2 last year. Workers feeling it the most were those in construction (33%) and logistics (33%), followed by retail (31%) and healthcare (18%).



“ I'd like to make a living wage so I don't have to work multiple jobs. That way, I can get more rest. And more recognition would be nice. We work hard. ”
Frontline Worker, Logistics

“

Right now if I work full-time every week I still struggle to pay my bills and groceries. The only way to do it is having my spouse work a full-time job as well which is very stressful on the normal family!

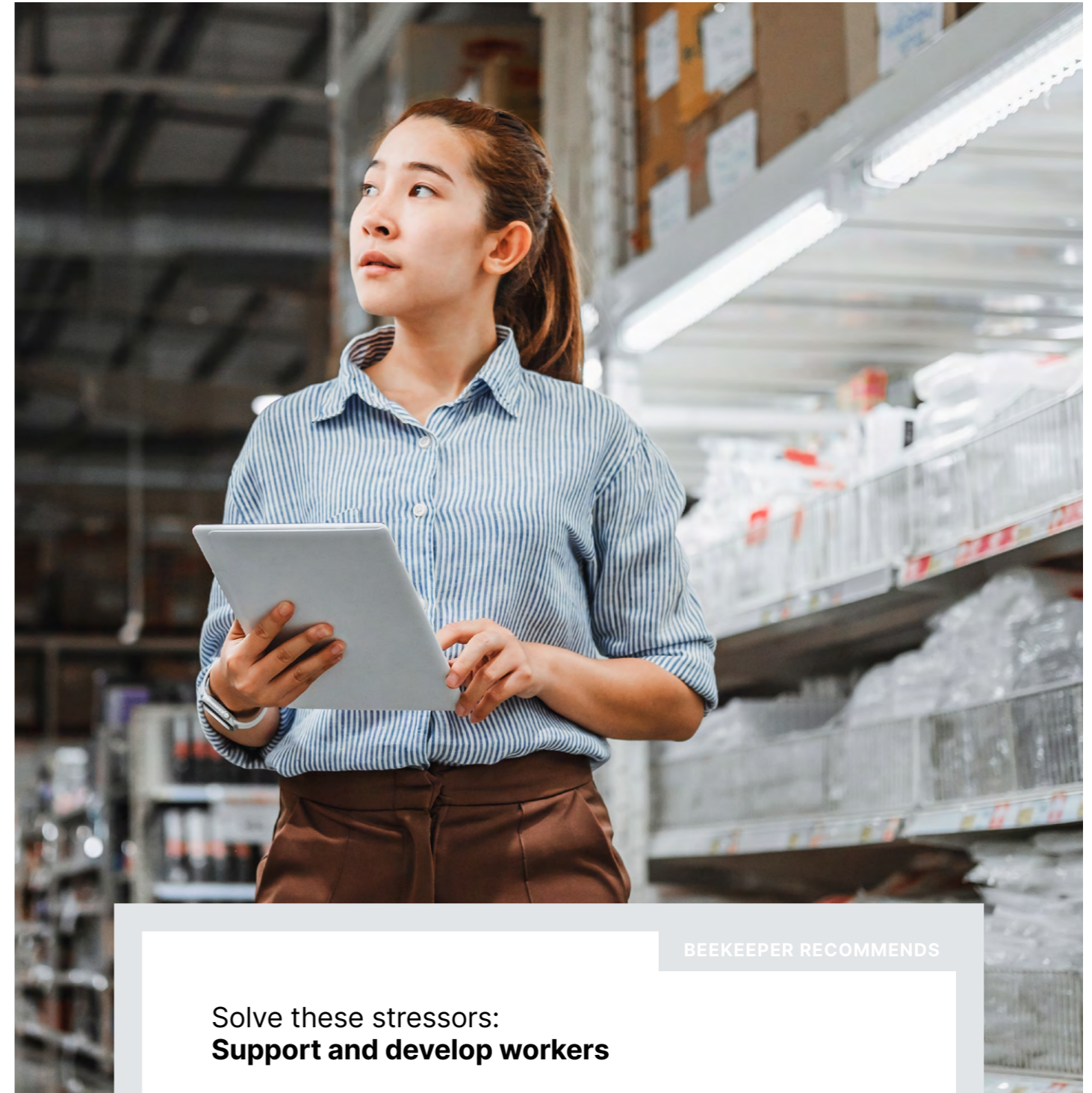
Better pay equals happier employees which equals better work, more production, and encouragement to move forward within the company!”

Frontline Worker, Construction

”

Interestingly, the quest for higher wages isn't the highest motivator in industries with high churn, such as hospitality, where close to 60% of all workers have left their jobs in the past year, or manufacturing, where 50% have. In these verticals, **the leading driver for seeking new employment is workers' desire for a better**

work-life balance. That's not surprising considering many workers have opted for job security by putting personal and family goals on the back burner for several years in order to address frequent business changes, fast-growing customer demand, and staff attrition.



BEEKEEPER RECOMMENDS

Solve these stressors:
Support and develop workers

- ✓ **Regularly survey and listen** to your frontline teams about their stresses, motivators, and productivity limiters.
- ✓ **Help workers and managers to establish a healthy work life balance**, through clear and reasonable shift allocation and task management.
- ✓ **Take burnout and toxicity seriously.** Cascade clear messaging to empower managers with talking points that fosters two-way communications and continuous improvement feedback loops.

Insight No.4

Workers to managers: Understand our need for safety and security.

After wages (#1), employees say their next two stressors are a lack of adequate staffing at their workplace and feeling safe and secure at work (#3). It's hard for workers to do a good job when half their team will turn over within this year.

Not only do existing workers have to do more, but they're constantly training new hires who may not stay, creating feelings of futility and being overwhelmed.

“ I don't even have a locker where I can safely keep my valuables during work without any worries!

Frontline Worker, Hospitality ”

Workers' need for safety and security is poorly understood by managers and HQ staff, who rank it as a much lower priority (#6) than their frontline colleagues (Reference data chart on page 16). Many workers are experiencing growing aggression from customers, making them feel unsafe at work.

This disconnect over safety and security is one that leaders will want to address to demonstrate that they understand workers' priorities and share their commitment to providing a work environment where all can flourish.



“ I simply want this: a safer working environment and health insurance.

Frontline Worker, Logistics ”

BEEKEEPER RECOMMENDS

Solve these stressors:
Address concerns over workplace safety

- ✓ **Use meetings, focus groups, and surveys** to define what safety and security means at your organization and identify current and emerging threats.

- ✓ **Enlist a committee of workers** to help create strategies for improving safety and security at your organization.

- ✓ **Address issues that harm a worker's sense of physical and emotional safety**, including giving them spaces to relax on breaks and secure personal valuables.

“

I appreciate having a great team. When I get a variety of **tasks and responsibilities that teach me something new, I feel more engaged and fulfilled.**

Frontline Manager,
Hospitality

”

Insight No.5

Workers thrive when they have friendship, fun, and a future

Happy workers are motivated by working in a friendly, secure, and supportive environment where they are empowered to get the job done as a team. They also want stability and to see a future at their place of employment, with clear opportunities for growth and career development.

Our question about working in a friendly and fun environment, new to this survey, obviously touched a nerve, as it was cited consistently across industries and regions as a top motivator. Clearly, workers want more enjoyment and fulfillment from work than they are currently receiving, as they log long hours without recognition, face negativity at work, and don't feel there's a future for them at their companies.

In **DACH**, employees find working in a fun and friendly environment to be their top incentive (41%), followed by the satisfaction

they feel when they get the job done (32%). In the U.S., workers want to get the job done most (29%), followed by maximizing opportunities for development (28%).

Managers are also highly motivated by passing on their skills and delivering training to their team (30%), which helps accomplish organizational missions and retain top talent. However, they rate their positive feedback more highly than teams do, ranking it as workers #2 motivator, whereas staff said it was #5 on their list.

What motivates you at work?

	WORKERS SAY			MANAGERS EXPECTED		
1 st	33%	Friendly and Fun Environment	36%			1 st
2 nd	30%	Simply Getting the Job Done	24%			3 rd
3 rd	21%	Learning and Development	23%			
	18%	Wage that keeps up with Inflation	18%			
	18%	Positive Feedback from Managers	25%			2 nd
	15%	Extra Benefits	10%			
	10%	Clear Team Goals	20%			
	9%	Company Mission	17%			

Evidence of disconnect: Frontline workers selected up to three options from the list. Frontline managers were given the same options, and asked how they expected their teams of workers would answer.

“

I enjoy being a part of a team which understands that we are all there to complete the same goal. **I enjoy working with people who will do what they need to do to get the job done.**

”

Frontline Manager, Logistics



“

I'm happy getting to work on making a product for the world that's safe to eat and enjoy.

”

Frontline Manager, Manufacturing

Across industries, receiving positive customer feedback was frontliners' top motivator (43%), not surprising since workers might produce goods and provide services for serve dozens of customers daily. For construction workers, the #1 motivation was getting the job done, cited at 45%. For these individuals, there's tangible and satisfying evidence of finishing a job when they move from one commercial or residential project to the next.



BEEKEEPER RECOMMENDS

Maximize these motivators:
Energize and engage frontline teams

- ✓ **Use frontline-friendly chat and messaging tools** to spur communication and collaboration within and across teams to create a unified culture and cultivate “one team” morale.
- ✓ **Use technology to promote learning and development opportunities**, and tie continuous learning to getting the job done with excellence, not just progressing careers.
- ✓ **Upweight focus on positive acknowledgement:** enable managers and workers to share customer, HQ, and their own praise with teams, keeping their motivation high.

Insight No.6

Productivity dips when motivators are ignored – and operational issues aren't addressed

It's no surprise to either frontline teams or managers that worker attrition is causing staffing issues. As managers focus on top-line issues such as customer loss, volatile revenues, and profitability, workers believe operational problems such as inadequate staffing, a lack of recognition, and poor team communications are not getting addressed and impacting their productivity.

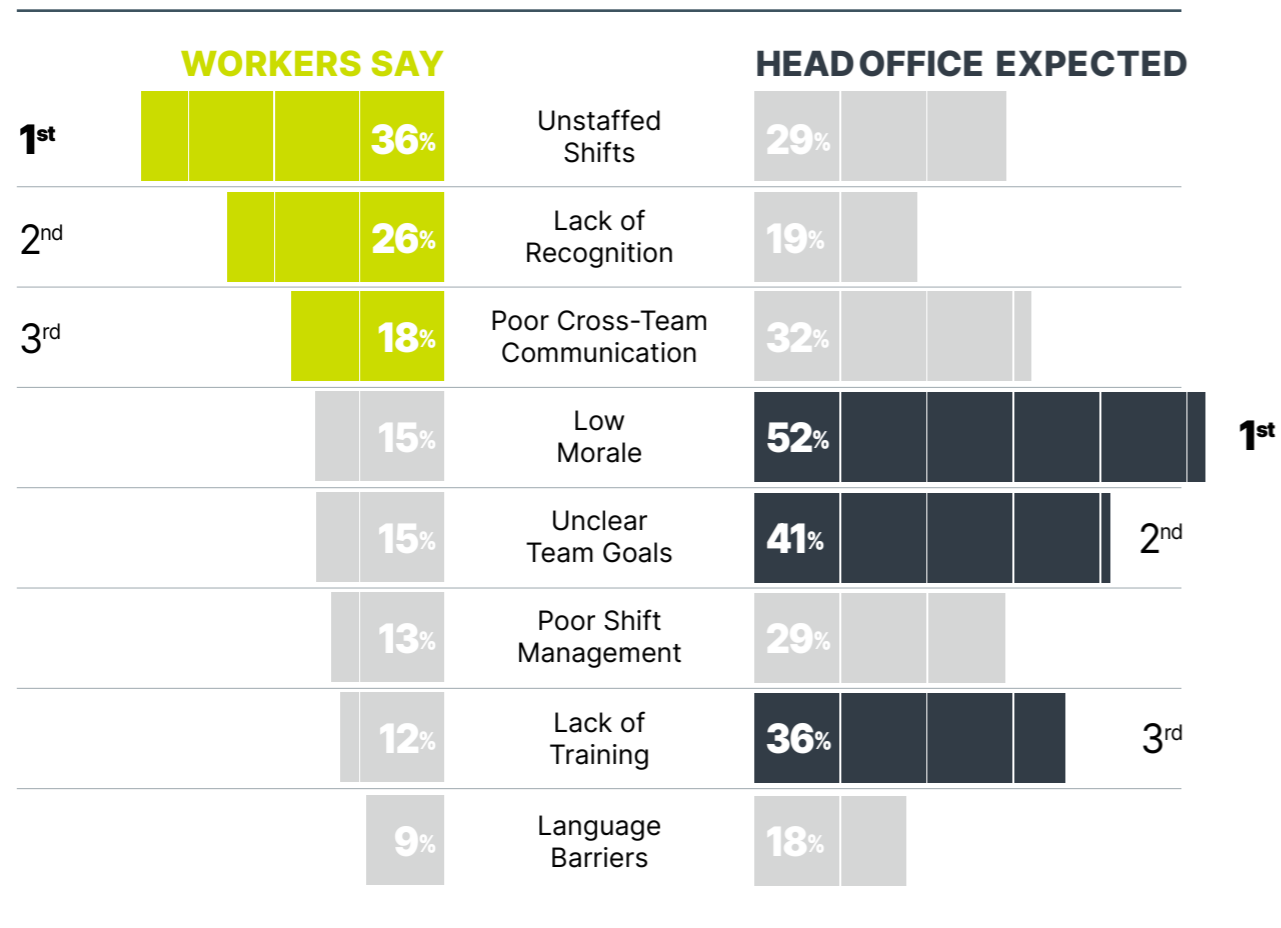
“

To be more productive we need good teamwork, a nice manager, and no stress... because the team knows what they need to do and what needs to be done.

Frontline Worker, Hospitality

”

What limits your productivity?



Evidence of disconnect: Frontline workers selected up to three options from the list. Head office workers were given the same options, and asked how they expected their teams of workers would answer.

To be productive, employees need and want to feel like they are part of a team, that their work matters, and that they are valued by leaders and customers. They'd like to have managers set clear goals and expectations and then be able to communicate and collaborate with each other to get the job done. It's important to note that this is different from just being told what the company's goals and objectives and key results (OKRs) are.

“ **Proper training and communication is, I think, very important between all four shifts, so all shifts are on the same page. Communication goes a long way.** ”

Frontline Worker, Manufacturing



When asked what limits their productivity, **frontline workers say** the #1 issue is understaffed shifts (36%), followed by a lack of recognition (26%), and poor team commu-

“ **Better planning and appreciation from the office side would help.** ”

Frontline Manager, Construction

nication (18%). It seems that when workers are struggling, having managers or HQ leaders ignore their discomfort or communicate poorly adds insult to injury. On this issue, the divide between workers and their HQ counterparts couldn't be wider, as executives didn't predict a single issue that workers felt strongly about. Instead, Head office staff perceived that low morale (52%), unclear team goals (41%), and a lack of training (36%) were the productivity inhibitors workers cared most about. Since workers care more about getting the job done than understanding goals, it's likely that the low morale that management sees is due to the operational challenges teams experience at work.

These results reveal that there's a growing disconnect between what workers want – and what their managers believe they want and need.

So, what does the expanding disconnect between executives and frontline teams mean for organizational performance? Management is likely using their perceptions of workforce stressors, motivators, and productivity limiters to inform key programs, from communications to workforce incentives and

developments. However, these initiatives aren't meeting workforce needs, when initiatives don't align to frontline workers' top priorities. As a result, leaders risk seeming insensitive and out-of-touch with workers' needs, leading to frontliners' disengagement and desire to find a new job.



“

I love it when I have the information and everything that I need to do for the day without having to call and ask what else is required of me. That is time consuming.

”

Frontline Worker, Hospitality

BEEKEEPER RECOMMENDS

Power up productivity: Optimize frontline processes and tools

- Get on top of shift-staffing.** Use mobile to reach, communicate, and confirm with your workforce their real-time availability, and where necessary, reallocate shifts.

- Provide a digital onboarding experience** with a welcome message, guided workflow, and access to all documentation, to prevent attrition due to a poor experience and unclear role expectations.

- Deploy recognition and rewards programs,** such as publicizing the employee of the month and all-star individuals and teams and providing spot bonuses for extraordinary performance.

Conclusion

Help everyone win at work by deploying tools that engage and empower

The world has moved on from the pandemic. However, the great resignation remains a real and damaging force in frontline businesses, destabilizing operations and denting profits.

The good news is that employers don't have to accept this status quo. They can use the insights provided by this report to identify and address key workforce stresses, motivators, and productivity limiters.

Employers who respond effectively to the needs of their frontline teams are offering fair pay and rewards, sensible staffing models, and a friendly and secure workplace that makes every individual feel valued and safe. And to execute this, they are investing in front-line-ready employee engagement and productivity tools like Beekeeper.

Beekeeper is a mobile-first platform that provides every worker with a digital identity and the tools to get the job done, communicate and collaborate with their teams, and learn and develop the skills they need to succeed.

In addition, it brings **all communications into a single platform, enabling managers to provide consistent messaging, track engagement and training** completion rates, and use metrics to continuously improve workforce performance.



Fresh Insights

With this winning tool and value proposition, companies attract and retain the very best frontline talent.

Here's how customers that deployed the Beekeeper Frontline Success System have solved challenging business problems, engaged workers, and improved key outcomes.

A U.S. traffic control company used technology to **fill 80% of open jobs faster** by boosting referrals, saving more than \$200k annually.



A global airport retailer **improved employee engagement by 60%** and shortened the typical time to inform staff about key developments from days to seconds.



A European manufacturing company **reduced the response time of critical maintenance** from more than an hour to less than three minutes.



A luxury Las Vegas resort hotel and casino **onboarded 5,000 workers** for its grand opening in weeks instead of months, across all departments.





This is Beekeeper

Beekeeper is transforming the way frontline businesses work. Our mobile-first platform helps companies ditch paper and manual processes to improve employee engagement, retention, and performance.

Empower employees with direct access to the people, processes, and systems they need to do their best work. Companies around the world use Beekeeper to connect their teams, unify their systems and drive their businesses forward.

Ready to equip your workforce with a system they'll actually use?

» **Schedule time with one of our frontline experts.**

