

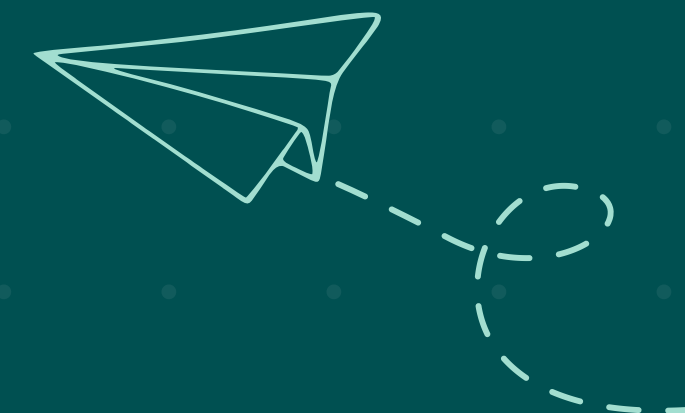


Q1 2025

# The State of the Frontline Worker

PART 1: EMPLOYEE ENGAGEMENT

Feedback from 46,250 Frontline Workers



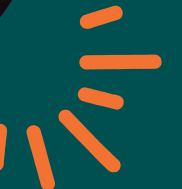


# Welcome!

If you're reading this, that means you care about frontline employee engagement, and we love that. Let's dive in.

The goHappy State of the Frontline Worker Series is a quarterly publication that reports on frontline employee experience, offering valuable insights to help employers build stronger connections with their teams. Each quarterly report focuses on a key aspect of the frontline worker journey—such as onboarding, benefits, turnover, and **employee engagement**, which is the central theme of this edition.

This report draws on 46,250 responses from frontline employees across the US and Canada, gathered in 2024 through goHappy's employee engagement surveys. The results deliver actionable insights to help you better understand, engage, and support your frontline workforce.



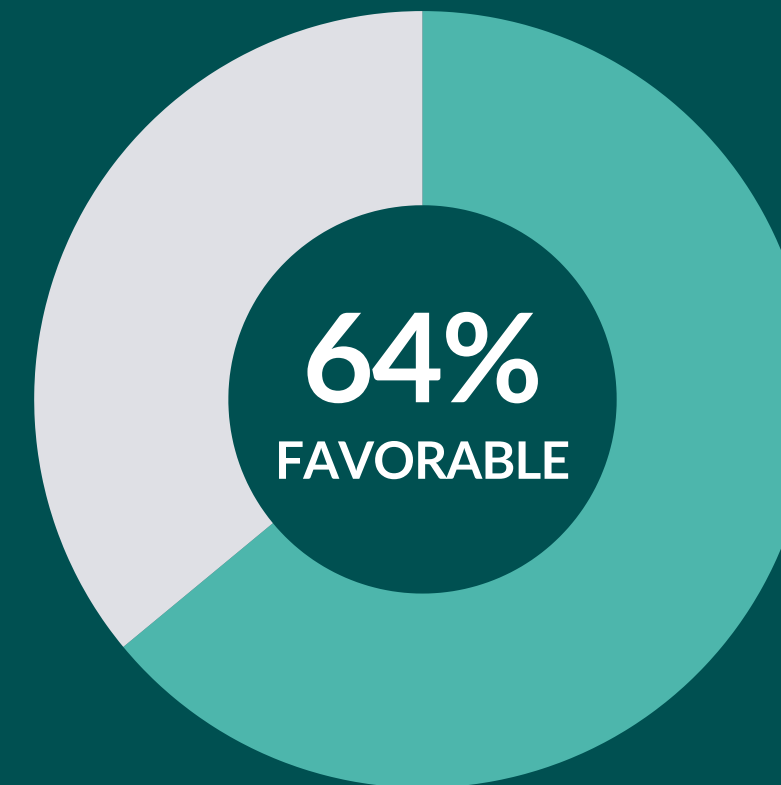


# Why Measure Engagement?

Employee engagement directly impacts business performance. When employees feel valued, connected, and supported in their daily work, they're more motivated to perform at their best, stay committed to their roles, and promote their workplace to others. This emotional connection has proven to lead to tangible outcomes like higher productivity, reduced turnover, and improved customer satisfaction.

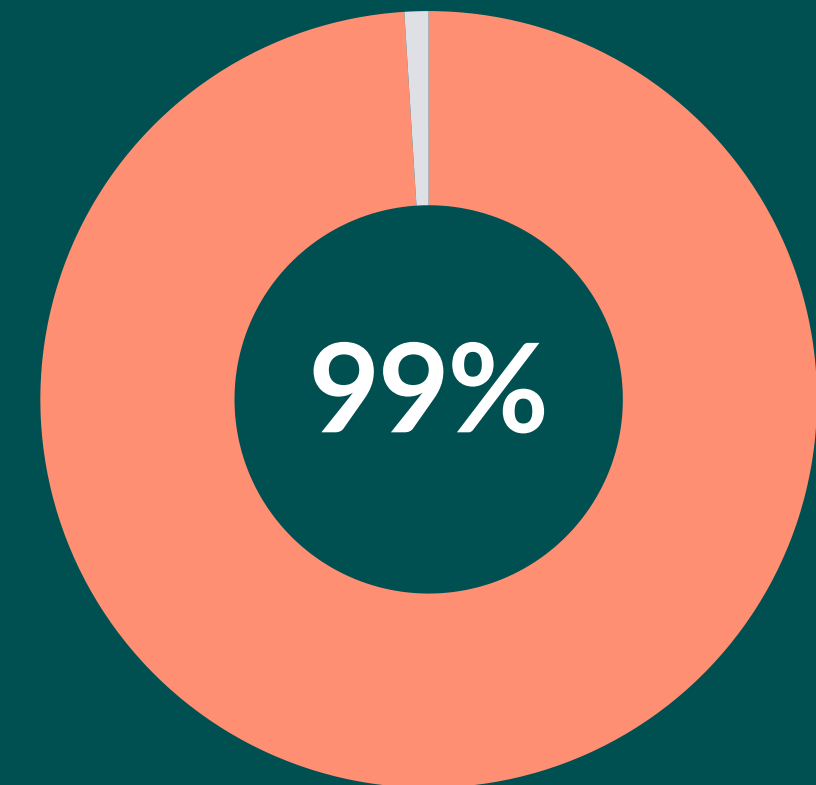
In 2024, only **64%** of frontline workers could be considered engaged, which helped contribute to a **99%** turnover rate.

## Engagement



EMPLOYEE ENGAGEMENT  
BENCHMARK

## Turnover



EMPLOYEE TURNOVER  
ROLLING 12 MONTHS





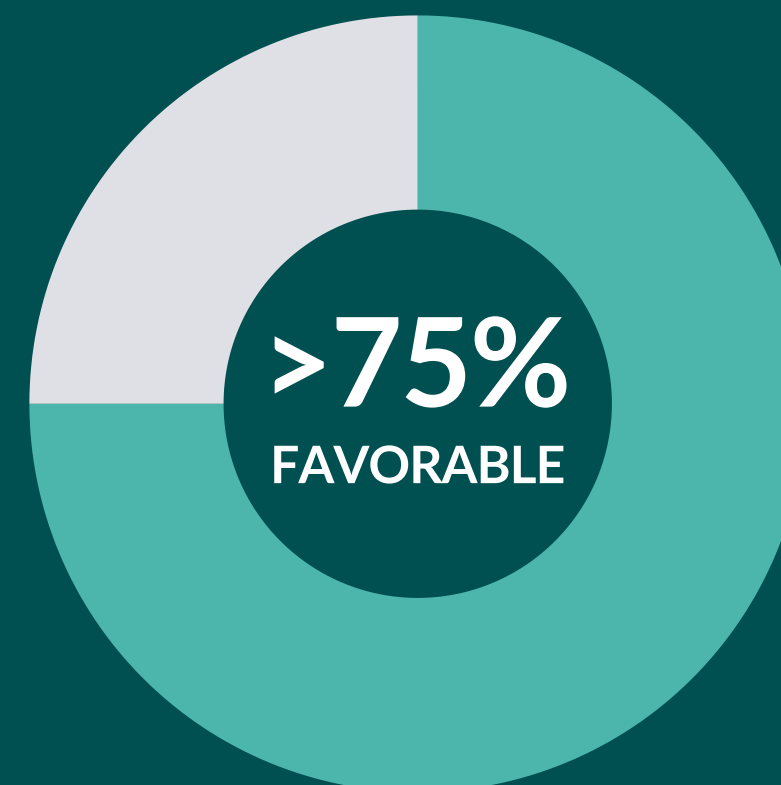
# Happier Frontline = Healthier Bottom Line

What if investing in your frontline employees could dramatically improve your business performance? It can.

Organizations that prioritize employee engagement are seeing transformational results, with lower turnover, higher productivity, and fewer missed shifts.

Employers with **engagement scores exceeding 75%** saw a 12-month rolling **turnover rate of just 85%**—a 14% improvement compared to the 99% turnover rate observed across all goHappy customers.

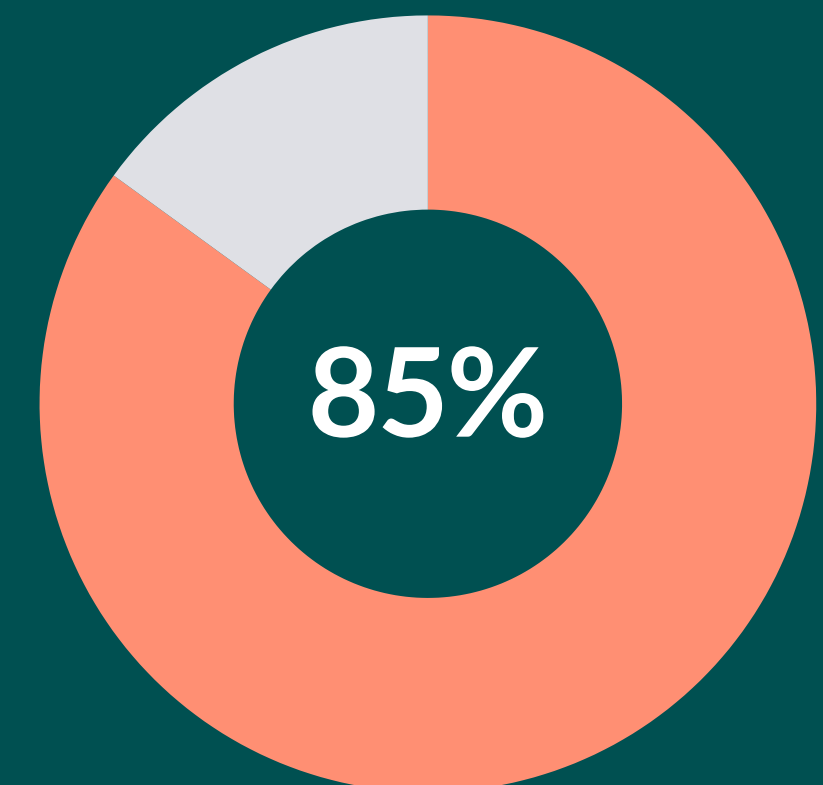
## Engagement



EMPLOYEE ENGAGEMENT  
BENCHMARK

▲ **11%+**  
CHANGE vs AVG

## Turnover



EMPLOYEE TURNOVER  
ROLLING 12 MONTHS

▼ **14%**  
CHANGE vs AVG

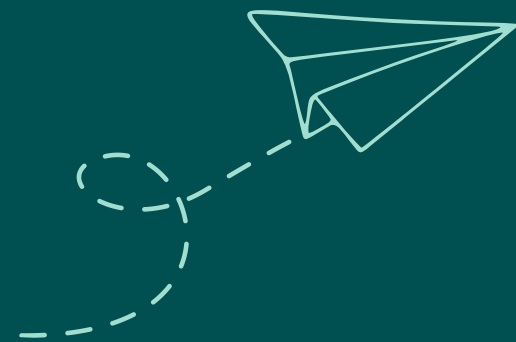




# Happier Frontline = Healthier Bottom Line

What could a 14% point change in turnover do for your bottom line?

SHRM estimates that **hiring one new hourly (non-exempt) employee costs \$4,700**. Multiply that by your churned employees, and the financial impact is clear. Happy, engaged frontline employees are not just good for morale but great for your bottom line.



Employees	Turnover Rate Improvement	Retained Employees	Cost Savings
500	14%	70	\$329,000
1,000	14%	140	\$658,000
2,000	14%	280	\$1,316,000
3,000	14%	420	\$1,974,000
4,000	14%	560	\$2,632,000



# Employee Engagement

Engagement is a heightened emotional connection that an employee feels to the organization, which influences them to exert greater discretionary effort in their work. It's divided into three core factors to understand what drives employees to give their best, remain loyal, and advocate for their organization.

## Perform

62%

62% of employees feel they are able to perform to their best ability. They are inspired to do their best work every day and often go the extra mile.

## Commit

63%

63% of employees believe it would take a lot for them to leave their current employer and can see themselves working there one year from now.

## Promote

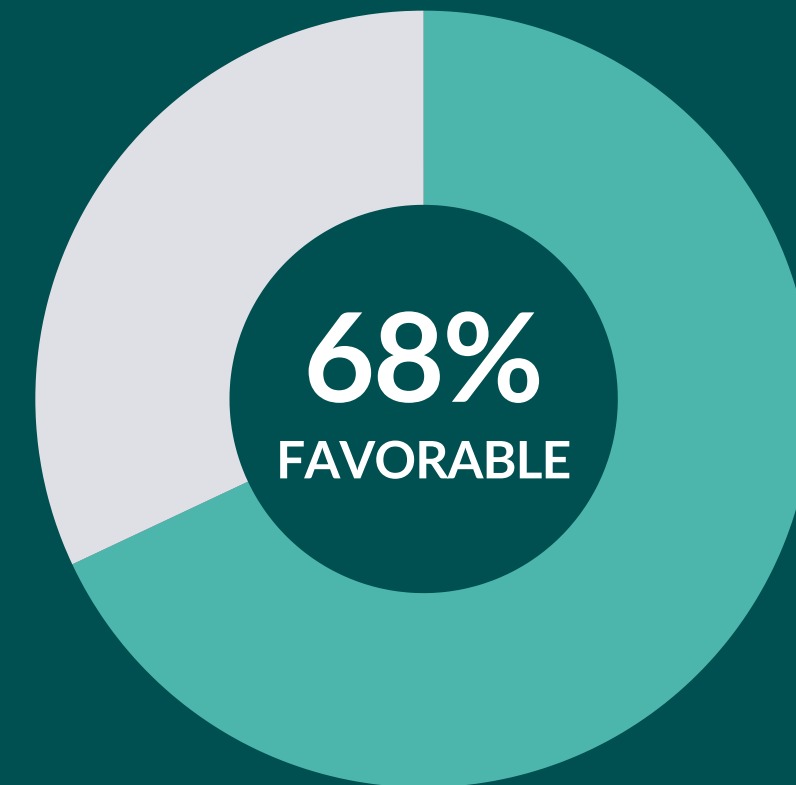
66%

66% of employees are proud of where they work and would recommend employment to their friends.



# Frontline Employee Experience

The employee experience is the sum of the relationships and actions of the organization and managers that generate sustainable feelings of being valued and connected at work.



EMPLOYEE EXPERIENCE BENCHMARK

## Feeling Connected

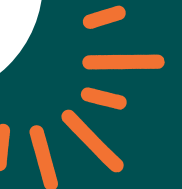
68%

68% of employees feel connected at work. They feel their managers set positive examples for employees and they enjoy their relationships with their coworkers. They feel their work environment is open, trustworthy and safe.

## Feeling Valued

69%

69% of employees feel valued. They have the necessary resources needed to do a good job. They feel their managers take their feedback seriously and provide them with opportunities to learn and grow.





# Leader Actions

The actions of frontline leaders play a pivotal role in shaping the employee experience, which in turn impacts engagement levels. The four key leader actions measured in the survey are:

## Connect

72%

72% of employees trust their manager to take their opinions seriously. They feel their work matters and they enjoy the relationships with their co-workers.

## Appreciate

69%

69% of employees think their managers show appreciation for them, care for them and recognize them for a job well done.

## Coach

69%

69% of employees feel like they are properly coached at work. They're provided with opportunities to grow and are given regular feedback on how they are performing.

## Be Authentic

63%

63% of employees believe their manager leads by example and creates an open and trusting work environment.

“My manager is the best. She has a way with employees. You always feel appreciated.”

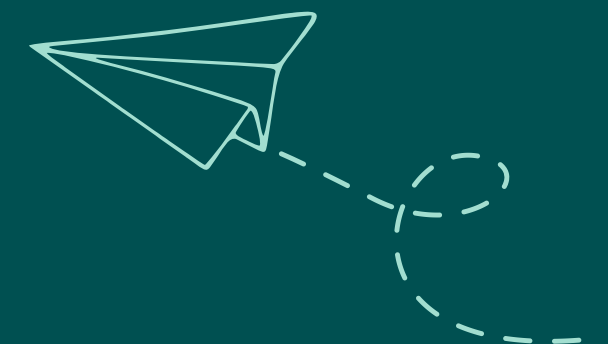
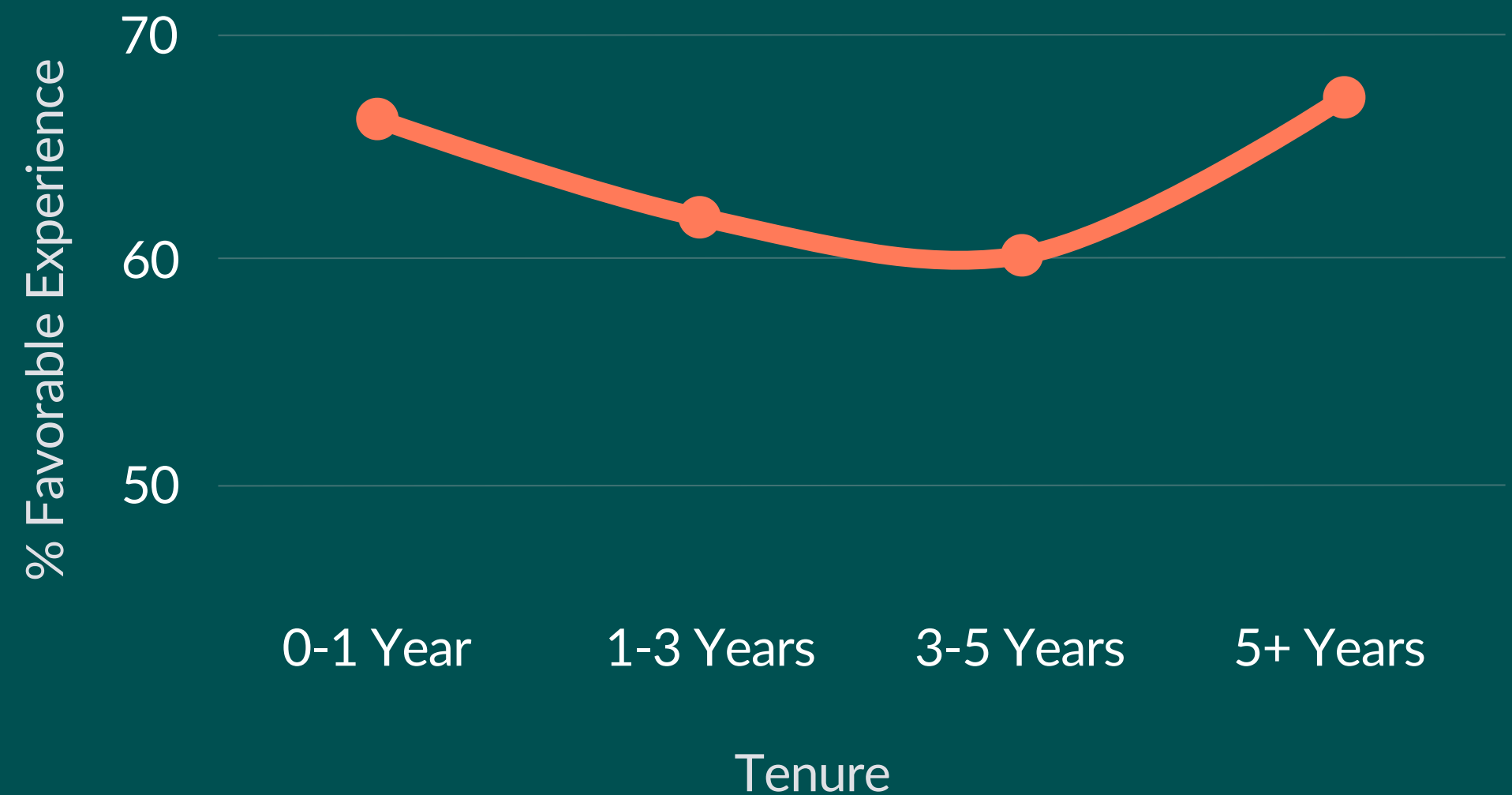




# Employee Experience Changes with Tenure

Employee experience tends to fluctuate over time. The survey data shows that experience scores are highest during the first year of employment but tend to decline over the next few years before rebounding after five years of tenure. This trend highlights the need for sustained engagement efforts beyond the onboarding phase, with a focus on career development and long-term growth.

Organizations can mitigate mid-tenure disengagement by providing **continuous learning opportunities**, **clear career progression paths**, and **consistent recognition of contributions**.





# Sector Spotlight:

## Food Service

The survey responses reveal notable differences in the employee experience between the food service sector and non-food service industries. This next section will explore some of the driving factors here.







## FOOD SERVICE SPOTLIGHT

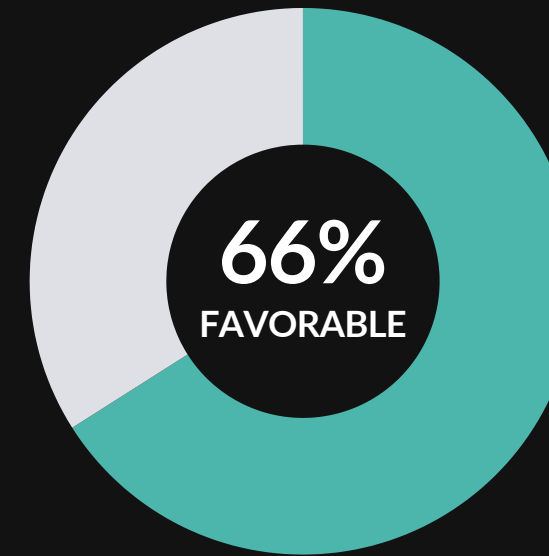
# Comparing the Employee Experience

The food service sector experiences the highest turnover rate (107%), but there are things we can learn from the engagement surveys when comparing to other sectors that help improve the employee experience and ultimately lower turnover.

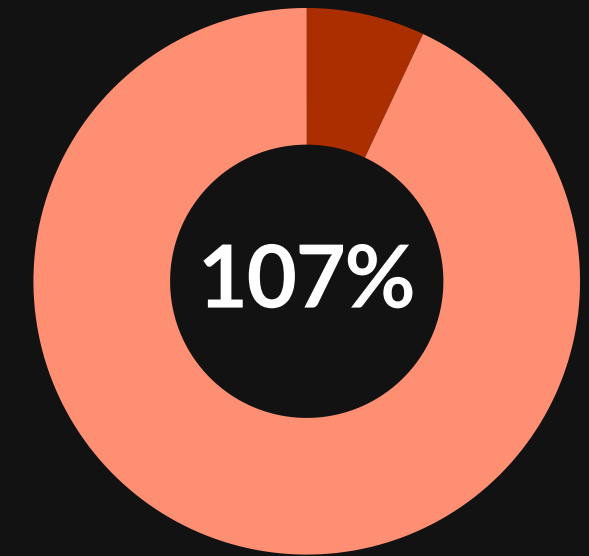
Restaurants with employee engagement scores above 75% are seeing an average turnover rate 14% below the food service average. Take **Snooze, an A.M. Eatery**, for instance. With an employee engagement score exceeding 75%, they've **reduced turnover to well below 85%**. Their success story highlights the direct link between engagement and retention.



## Food Service

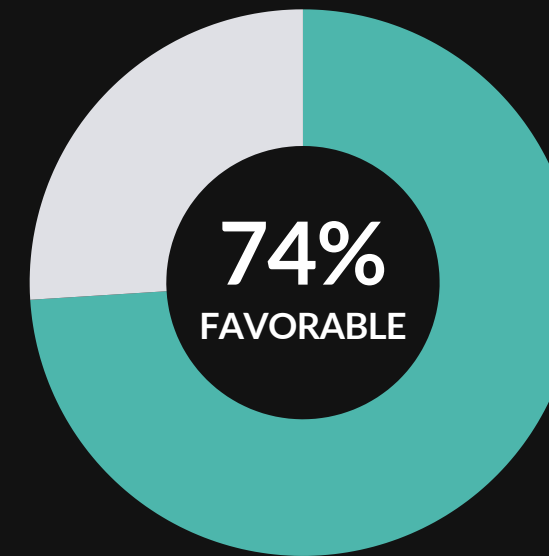


EMPLOYEE EXPERIENCE  
BENCHMARK

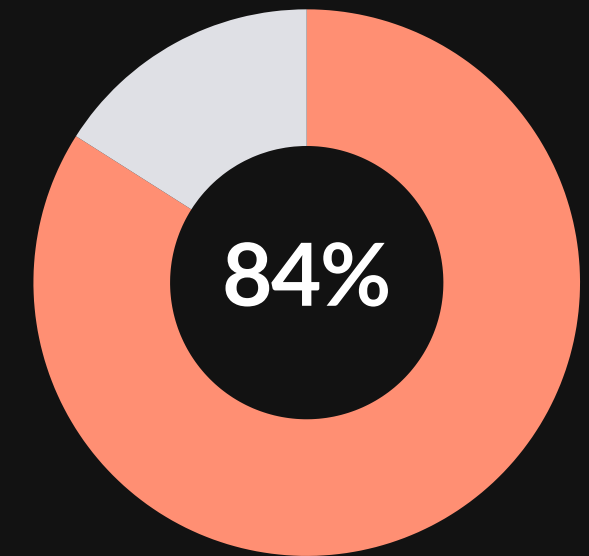


EMPLOYEE TURNOVER  
ROLLING 12 MONTHS

## Non-Food Service



EMPLOYEE EXPERIENCE  
BENCHMARK



EMPLOYEE TURNOVER  
ROLLING 12 MONTHS

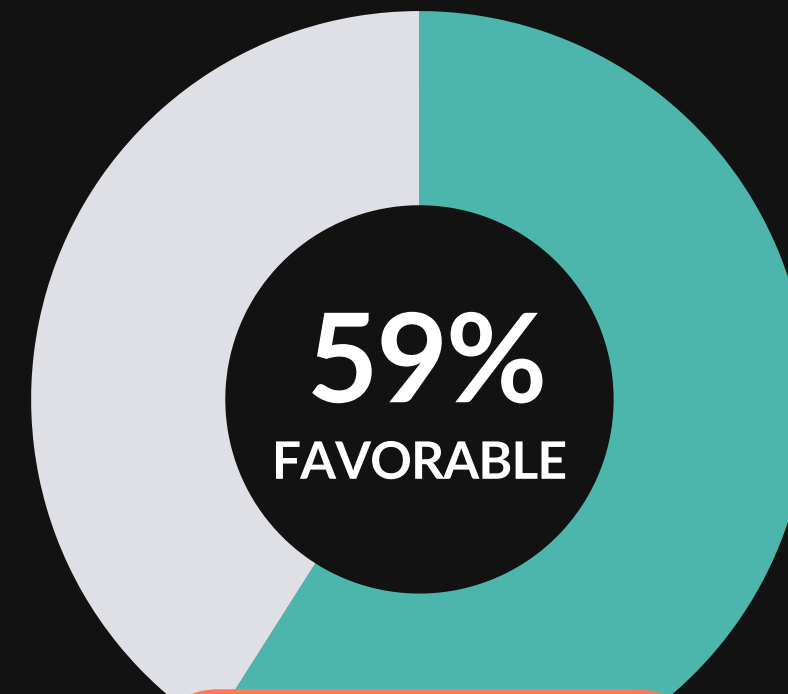
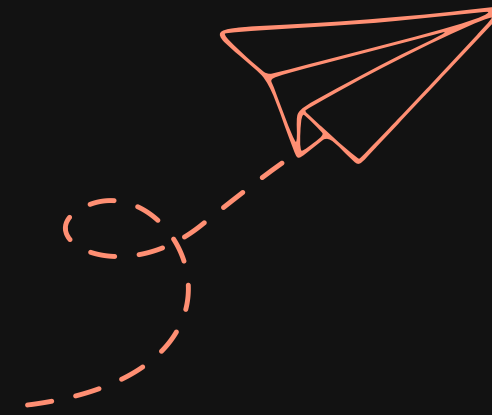


## FOOD SERVICE SPOTLIGHT

# Leader Actions: Being Authentic

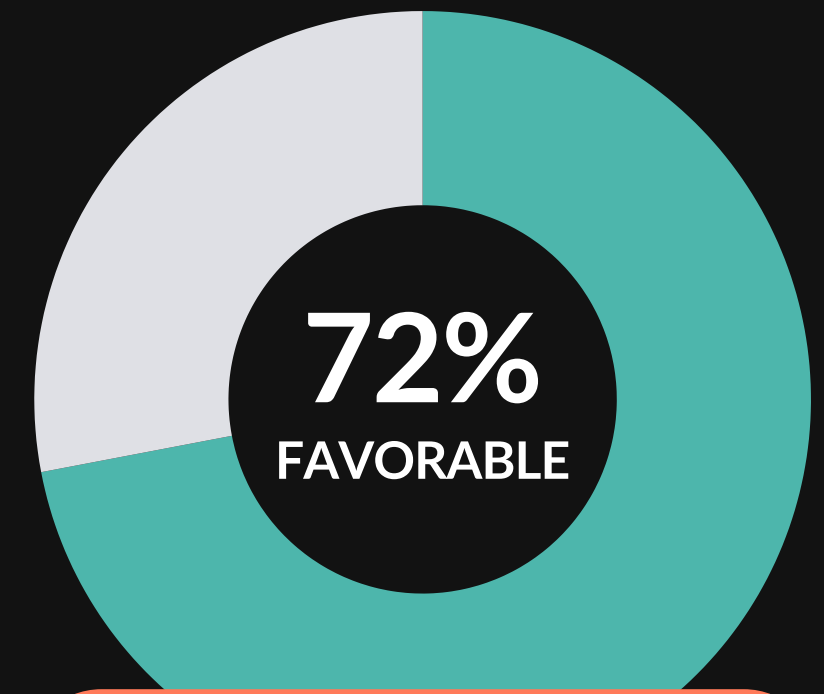
A notable difference emerged between the food service and non-food service sectors regarding the Be Authentic Leader Action. While 72% of non-food service employees feel their manager leads by example and fosters an open, trusting work environment, only 59% of food service employees share this sentiment.

The comment analysis indicates that restaurant employees often face challenges related to communication, recognition, and work-life balance. In contrast, non-restaurant employees report more consistent support from their leaders and greater opportunities for growth and development. Closing this gap requires a focus on **improving communication**, **fostering authentic leadership**, and **ensuring employees feel valued** for their contributions.



Food Service

BE AUTHENTIC  
BENCHMARK



Non-Food Service

BE AUTHENTIC  
BENCHMARK



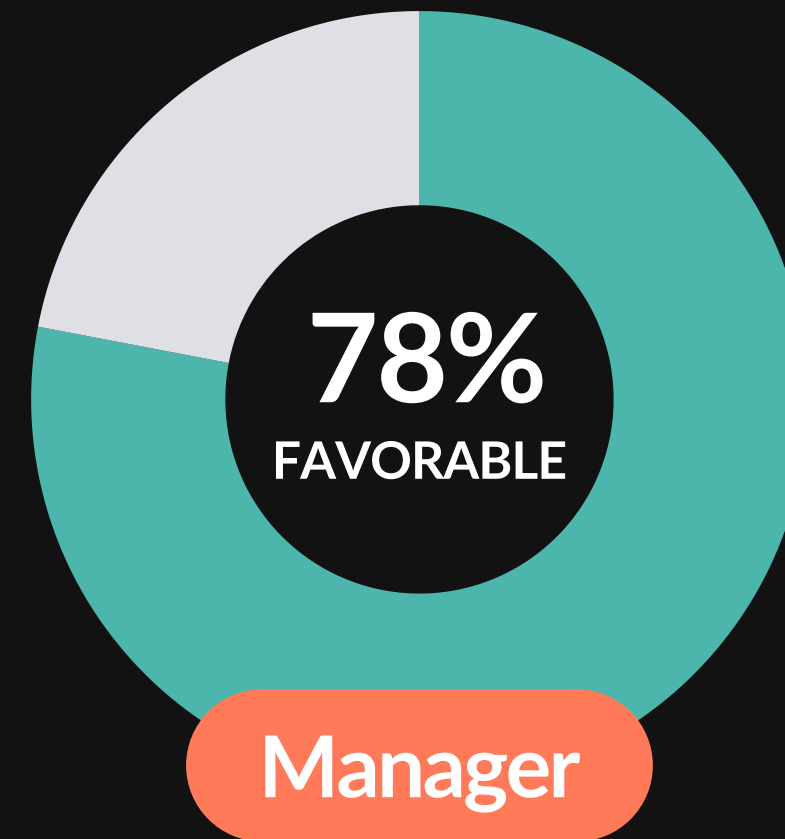


## FOOD SERVICE SPOTLIGHT

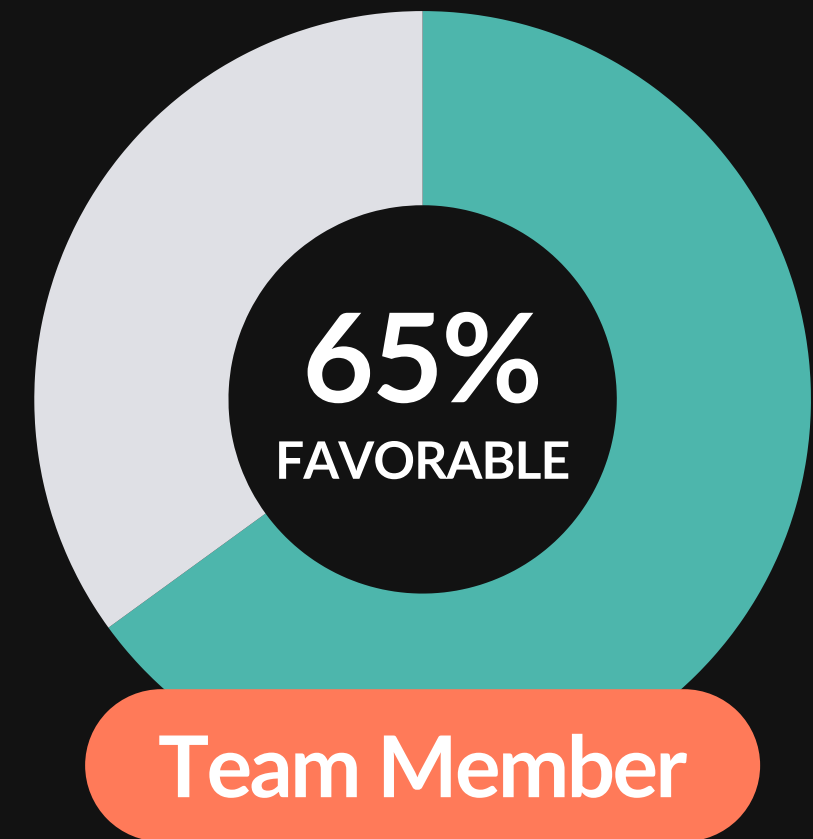
# Managers vs. Team Members

While 78% of food service managers report a positive employee experience, only 65% of team members share the same sentiment.

This disconnect underscores the need to bridge the gap between leadership and frontline employees. Providing managers with training and resources to better support their teams can help create a more consistent and engaging experience for all employees. Notably, this gap was not observed in non-food service industries, where both managers and team members reported similar experience scores.



EMPLOYEE EXPERIENCE  
BENCHMARK



EMPLOYEE EXPERIENCE  
BENCHMARK

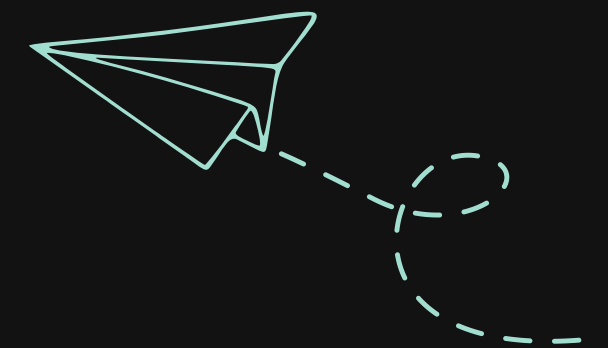
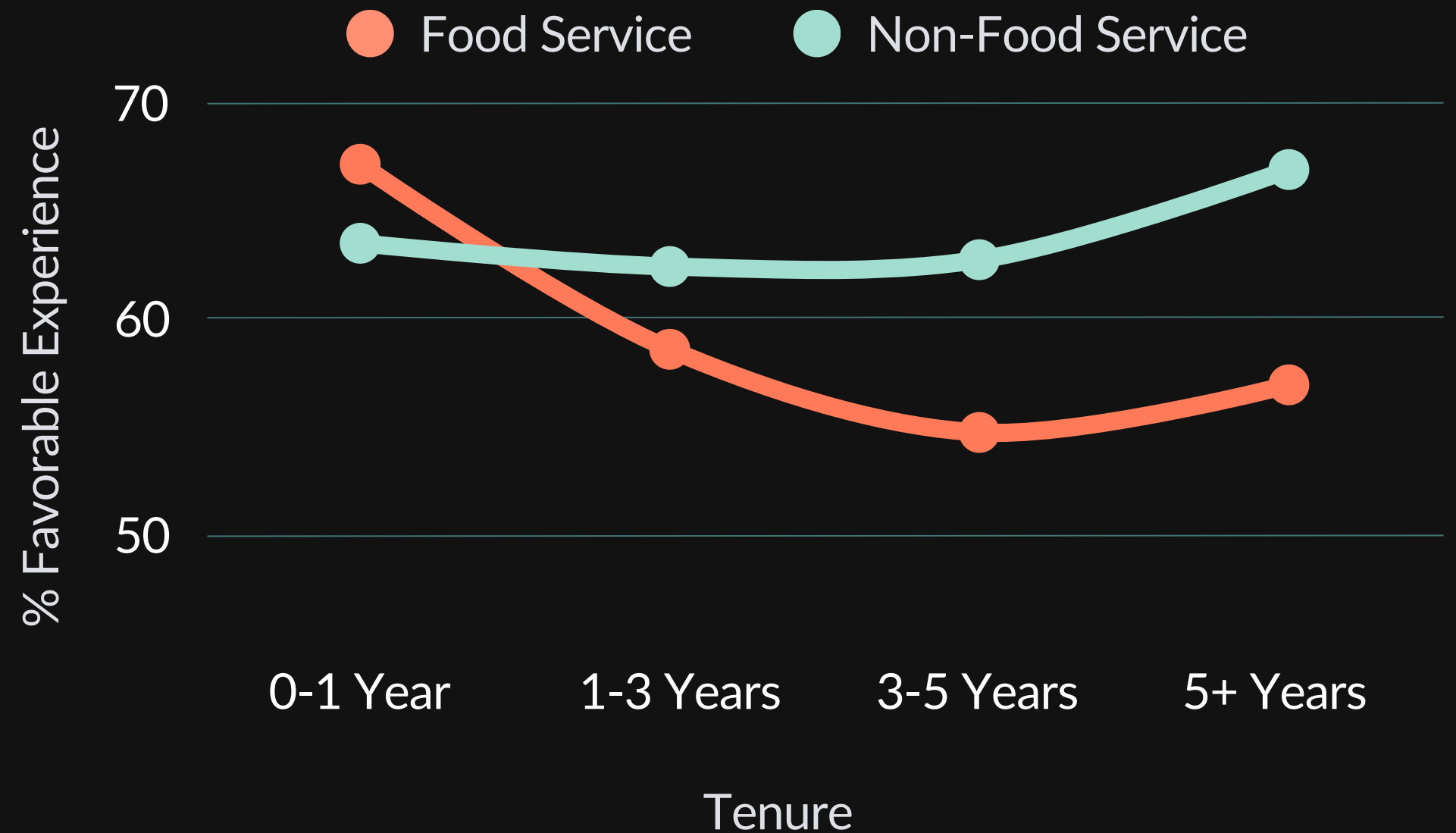


## FOOD SERVICE SPOTLIGHT

# Employee Experience Changes with Tenure

Food service employees report a steeper decline in experience ratings within their first few years compared to non-food service employees.

This trend suggests that improving long-term career progression and training opportunities is crucial for sustaining engagement in the food service sector. **Offering pathways for advancement, providing ongoing development, and fostering a culture of recognition** can help mitigate mid-tenure disengagement.





## FOOD SERVICE SPOTLIGHT

# What's Working?

Despite the challenges, several factors stand out as strengths within the food service sector. The top positive themes identified in employee comments include:

“I am happy to work with a group of people that really cares. We have fun working together and we support each other.”



### Manager Support

Managers who provide clear guidance and show appreciation for their teams contribute to a more positive work environment.



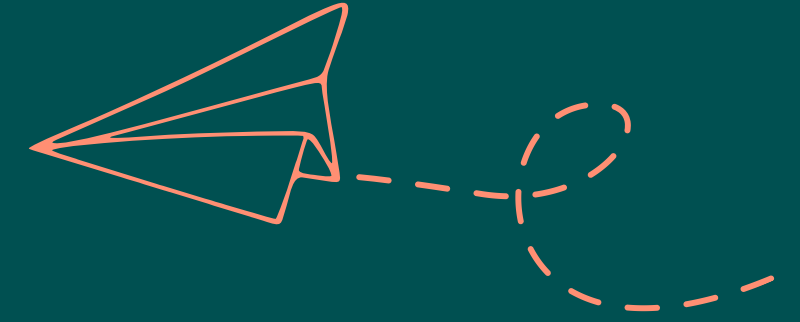
### Sense of Purpose

Many employees take pride in their work and feel a sense of accomplishment from serving others.



### Team Camaraderie

Employees value the sense of teamwork and camaraderie that comes from working closely with their peers.



# Best Practices

By applying these best practices, organizations can create a more engaging and supportive environment that empowers frontline employees to thrive regardless of industry.

## ① Lead By Example

Managers who demonstrate authenticity and consistency foster trust and respect within their teams.

## ③ Recognize Contributions

Regularly acknowledging employees' efforts and celebrating achievements reinforces a sense of value and belonging.

## ② Foster Open Communication

Creating an environment where employees feel heard and informed strengthens their connection to the organization's mission.

## ④ Invest in Growth

Providing opportunities for skills development and career progression enhances long-term engagement and retention.





# Best Practices for Collecting & Acting on Feedback

goHappy has observed that the employers with the highest frontline employee engagement follow a simple process for continuous improvement.

1. **ASK FOR FEEDBACK:** goHappy's surveys are designed for the frontline and delivered via SMS for high response rates.
2. **DISTILL THE RESULTS:** Discover your strengths and weaknesses and uncover common themes at the location or job title level.
3. **PICK 3-4 FOCUS ITEMS:** You can't boil the ocean. Pick 3-4 actionable and impactful opportunities for the next year.
4. **IMPLEMENT ACTION PLAN:** Develop a plan for how the changes can be rolled out and communicated.
5. **COMMUNICATE ACTION PLAN:** Make sure you're communicating the changes you've made so employees know their voices are being heard.
6. **REPEAT**





# Trusted by Leading Frontline Brands

Top frontline employers are using goHappy to measure and improve frontline engagement.

This is the easiest engagement survey I've done, and I've been doing these for nearly 25 years. Some of it is the improvement in technology, but a lot of it is goHappy clearly knows what they're doing in this area and really has it down to a science. That is very much appreciated.

Charlie Webb, Vice President of People Excellence





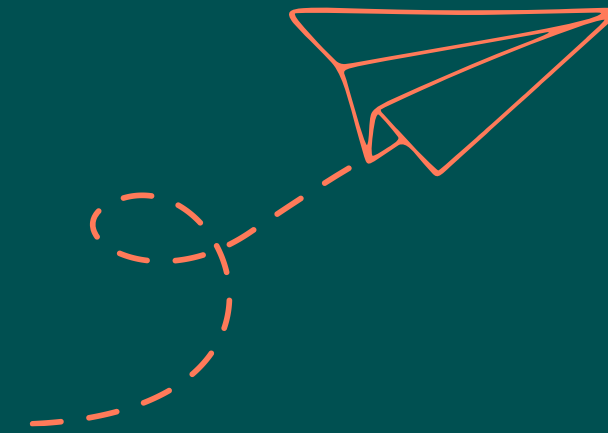


# Conclusion

The 2024 goHappy State of the Frontline Worker Employee Engagement Report underscores the critical role of employee experience in driving engagement and business success. By focusing on key factors like connection, recognition, and authentic leadership, organizations can create a workplace where employees feel valued, supported, and motivated to perform at their best. Whether in the restaurant sector or beyond, investing in the frontline experience is a proven strategy for improving both employee well-being and organizational performance.







# Methodology

This report is based on 46,250 engagement survey responses collected in 2024 using goHappy's Feedback tool. All engagement data is derived from surveys conducted by employers across the US and Canada. Favorability is considered a response of 4 or 5 (Agree or Strongly Agree) on a 5 point Likert scale.

To analyze the qualitative feedback, goHappy leveraged its AI-powered sentiment and comment theming analysis, which identified key themes, patterns, and employee sentiments. This advanced analysis provided deeper insights into the factors that influence frontline employee engagement, helping organizations understand both the strengths and opportunities within their workforce.

The turnover data in this report is sourced from goHappy's proprietary Turnover Benchmarking tool. The tool integrates real-time data from an employer's HRIS or payroll system, enabling seamless comparison against industry peers.

Employers who use goHappy's Feedback and Turnover tools can analyze results across multiple dimensions, including location, job title, tenure, and more. They can also trend their results over time and benchmark against industry standards.







Q1 2025

# The State of the Frontline Worker

PART 1: EMPLOYEE ENGAGEMENT

## Thank You!

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