Displai

DISPLAI RESEARCH · 500 RETAIL FRONTLINE WORKERS

The State of Frontline Work Report

We asked 500 frontline workers in US retail, the people who stock the shelves, run the POS and close the store, how engaged they are, why that is changing and what would help. Here is what they told us, chapter by chapter, one mark per person.

500
retail frontline workers

6
chapters

Pollfish
online survey, organic sampling



KEY FINDINGS

Four key findings on frontline work

Only one in ten retail frontline workers is highly engaged, and nine in ten expect to quit within the year. Asked what would help outside pay, they did not ask for more hours or more technology first. They asked to be rewarded and recognized. The service customers get is slipping with them.

01

59%

Six in ten are not engaged at work

59% of retail frontline workers describe themselves as not very engaged and 31% as somewhat engaged. Only 10% are highly engaged, down from 38% in the previous edition and 53% two editions earlier.

02

89%

Nine in ten expect to quit within a year

89% say they are likely to quit their job in the next 12 months, up from 52% in the previous edition. 78% see more turnover than ever in their company; 10% see about the same level as before and 12% see less.

03

24%

They ask for rewards, recognition and tools

Outside of pay, offer incentives and rewards came first at 24%, recognize my performance second at 21% and provide better tools for doing my job third at 16%. In the previous edition, communicate better was the top answer.

04

51%

Half say the service they give got worse

51% say the quality of service they provide decreased over the past 12 months. Of those, 61% blame a lack of employee recognition and 28% staff turnover or shortages.

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CHAPTER 01

Frontline worker engagement

59% of retail frontline workers say they are not very engaged at work, and only 10% say they are highly engaged. Two editions earlier, more than half were highly engaged. Almost everyone says their own engagement fell over the past year.

59%

of retail frontline workers are not very engaged at work. In the previous edition of this survey it was 29%.

HOW ENGAGED THEY ARE

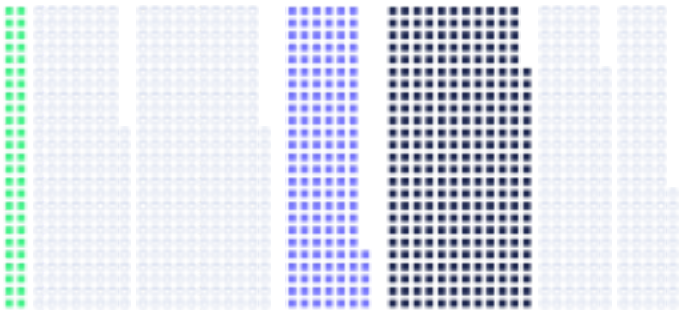
10%

One in ten is highly engaged. Six in ten are not.

10% of retail frontline workers call themselves highly engaged, 31% somewhat engaged and 59% not very engaged. The outlined queues show the same two answers in earlier editions of this survey: highly engaged was 38% in the previous edition and 53% two editions earlier, while not very engaged was 29% and 22%.

How engaged are you at work today?

n = 500 · one mark per person



Highly engaged	50 · 10%
Previous edition, highly engaged	190 · 38%
Two editions earlier, highly engaged	265 · 53%
Somewhat engaged	155 · 31%
Not very engaged	295 · 59%
Previous edition, not very engaged	145 · 29%
Two editions earlier, not very engaged	110 · 22%

Outlined marks are earlier editions of the same survey question, drawn to the same scale: one outline per respondent in that edition's share.

THE PAST YEAR

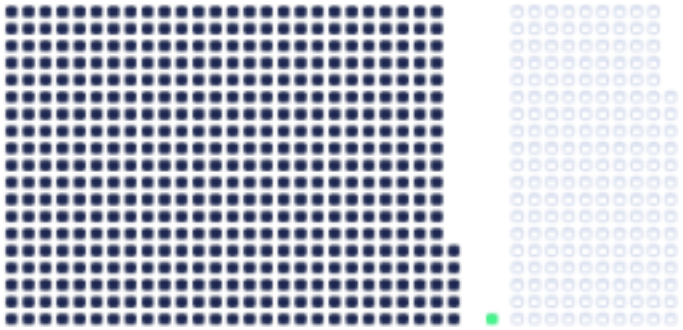
99.8%

Nearly all say their own engagement went down

Asked how their engagement changed over the past 12 months, 99.8% said it decreased. One person in 500 said it increased. Nobody said it stayed the same. In the previous edition, 37% said their engagement had increased.

Over the past 12 months, has your engagement at work increased, decreased or stayed the same?

n = 500



Decreased	499 · 99.8%
Increased	1 · 0.2%
Previous edition, increased	185 · 37%
Stayed the same	0 · 0%

The single green mark is one respondent. Nobody chose stayed the same.

WHY IT FELL

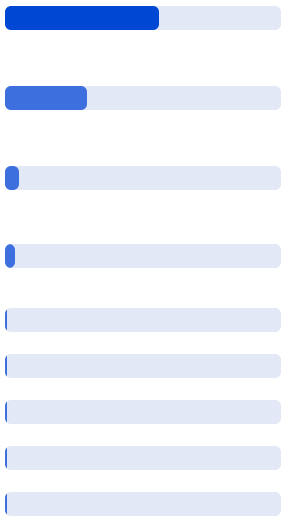
56%

Overwork from staff shortages is the top reason

Outside of changes in pay, 56% put the drop down to being overworked because of staffing shortages, and 30% to coworkers leaving or being fired. Everything else is small. In the previous edition the top reason was stagnant work; overwork was at 10% and losing coworkers at 12%.

What is the primary reason your engagement decreased?

Single answer, outside of changes in pay



Overworked because of staffing shortages	56%
Coworkers leaving or being fired	30%
Stress related to COVID-19	5%
No room for promotions or raises	4%
Low morale	1%
Poor management	1%
Stagnant work	1%
Company changes	1%
Store changes	1%

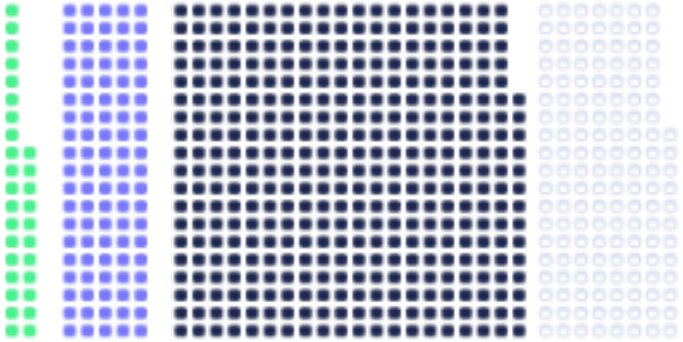
COWORKERS

75%

Three in four say their coworkers are not engaged

6% see their coworkers as highly engaged, 19% as somewhat engaged and 75% as not very engaged. In the previous edition, 29% said their coworkers were not very engaged. That is a harsher read than they give themselves: 59% called their own engagement not very engaged.

How engaged are your coworkers? n = 500



Highly engaged	30 · 6%
Somewhat engaged	95 · 19%
Not very engaged	375 · 75%
Previous edition, not very engaged	145 · 29%

THIS SURVEY VS THE PREVIOUS EDITION

Every measure moved the same way

PREVIOUS EDITION	
Highly engaged	**38%**
Not very engaged	**29%**
Rose in the past year	**37%** said it increased over the year
Top reason it fell	**Stagnant work**

THIS SURVEY	
Highly engaged	**10%**
Not very engaged	**59%**
Rose in the past year	**0.2%**, one respondent in 500
Top reason it fell	**Overworked** because of staffing shortages, 56%

So what: the report reads the shift from stagnant work to overwork as the staffing shortage reaching the shop floor. The two editions are separate samples of 500, so treat the direction as the finding, not the exact size of the gap.

Previous-edition figures are the ones the report itself published for comparison. Two editions earlier it reported only the engagement split: 53% highly engaged, 22% not very engaged.

IN SHORT

Low and falling: 10% highly engaged, 59% not very engaged, and 99.8% say their own engagement dropped over the year. The reasons are staffing: overwork from shortages and the loss of coworkers. Three in four see the same disengagement around them.

Two editions earlier, more than half of retail frontline workers were highly engaged. The next chapter is what that does to turnover, and what workers say would help.

CHAPTER 02

Turnover and what would help

78% of retail frontline workers see more turnover than ever in their company, and 89% say they are likely to quit within the year. Asked what would help outside pay, they put rewards first, recognition second and better tools third.



TURNOVER

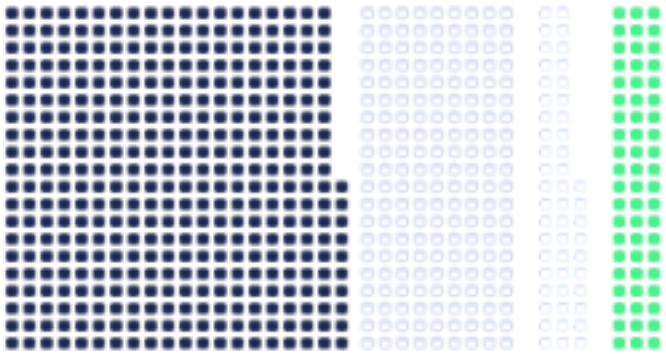
78%

More turnover than ever, say nearly four in five

78% see more turnover than ever in their company, 10% about the same as in the past and 12% less than ever. In the previous edition, 36% saw more turnover than ever. The outlined queue shows that earlier answer at the same scale.

How does turnover in your company compare with the past?

n = 500



More turnover than ever	390 · 78%
Previous edition, more than ever	180 · 36%
About the same	50 · 10%
Less than ever	60 · 12%

WHAT WOULD HELP

24%

Rewards, then recognition, then better tools

Outside of pay, 24% would have the company offer incentives and rewards, 21% would have it recognize their performance and 16% want better tools for doing the job. Career growth, team morale, training and management follow. In the previous edition, communicate better was the top answer and rewards came second; this time communicate better is last, at 4%.

Outside of pay, what is the top way your company could increase your engagement?

Single answer; shares sum to 101% as published



THE CYCLE

89%

The report calls it a vicious cycle

Staff shortages and departures depress engagement, and 89% of the workers who remain say they are likely to quit in the next year. That feeds the next round of shortages. Three measures in this survey moved together, all in the same direction.

Three numbers that moved together

This survey vs earlier editions

1	**Not very engaged** 22% two editions earlier, 29% in the previous edition.	**59%**
2	**Coworkers not very engaged** 29% in the previous edition.	**75%**
3	**More turnover than ever** 36% in the previous edition.	**78%**

89% say they are likely to quit their job in the next 12 months, up from 52% in the previous edition. Chapter six has that question in full.

IN SHORT

Turnover is up by the workers' own account: 78% see more than ever, against 36% in the previous edition. Asked what would help outside pay, they asked for rewards, recognition and better tools, in that order. Communicating better, the top answer of the previous edition, fell to last.

The report's reading: shortages and departures lower engagement, and low engagement produces the next departures. The next chapter is what customers see.

CHAPTER 03

Customer service quality

57% of retail frontline workers rate the service they give as not very good, and 51% say it got worse over the past year. Those who say it got worse point to two things: a lack of recognition and staff turnover.

51%

say the service they provide to customers decreased over the past 12 months. In the previous edition it was 33%.

SERVICE TODAY

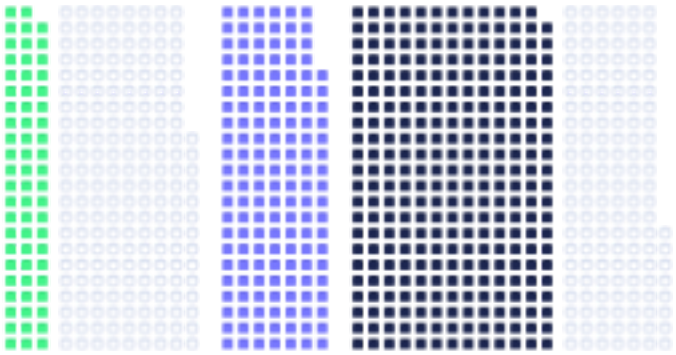
57%

Most rate the service they give as not very good

13% call the service they provide very good, 30% somewhat good and 57% not very good. In the previous edition, 38% said very good and 28% not very good. The outlined queues show those two earlier answers.

How would you rate the service you provide to customers?

n = 500



Very good	65 · 13%
Previous edition, very good	190 · 38%
Somewhat good	150 · 30%
Not very good	285 · 57%
Previous edition, not very good	140 · 28%

THE PAST YEAR

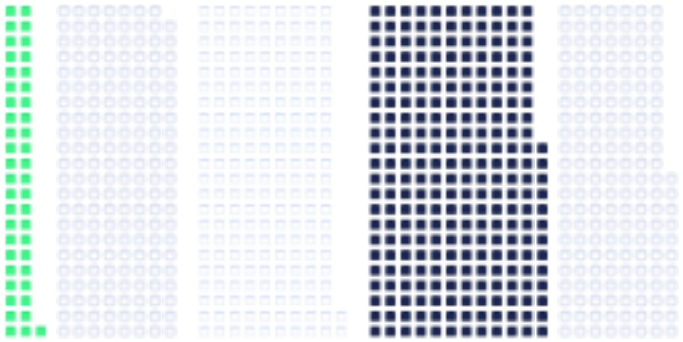
51%

Half say their service got worse over the year

9% say the service they provide increased over the past 12 months, 40% say it stayed the same and 51% say it decreased. In the previous edition, 35% said it had increased and 33% that it had decreased.

Over the past 12 months, has the service you provide increased, decreased or stayed the same?

n = 500



Increased	45 · 9%
Previous edition, increased	175 · 35%
Stayed the same	200 · 40%
Decreased	255 · 51%
Previous edition, decreased	165 · 33%

WHY IT IMPROVED

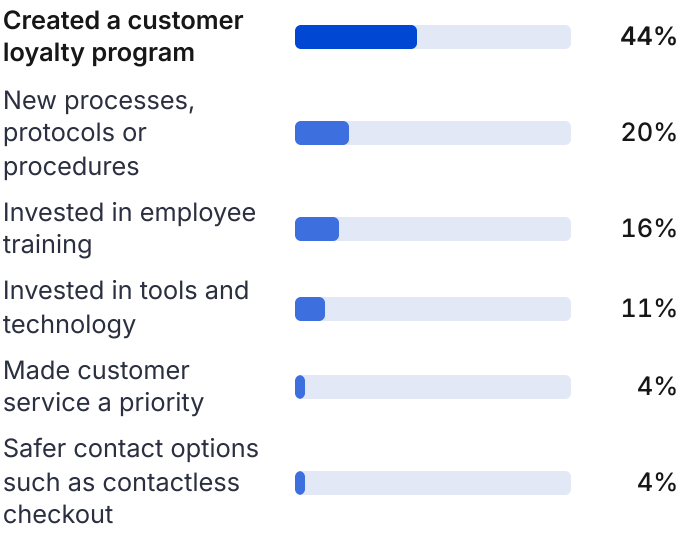
44%

Where service improved, a loyalty program led

Among the 9% whose service improved, about 45 people, 44% credit a new customer loyalty program, 20% new processes or protocols, 16% investment in training and 11% investment in tools and technology. Small base: read these as a lead, not a result.

What was the number one reason your customer service improved?

Among the 9% who said it improved, about 45 respondents



WHY IT GOT WORSE

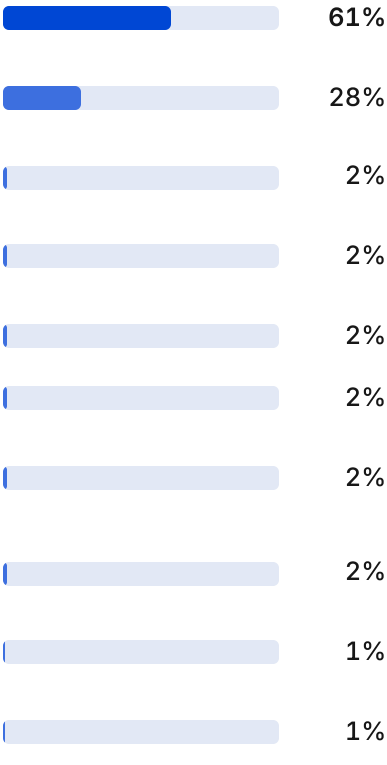
61%

Where it got worse, six in ten name recognition

Among the 51% whose service got worse, about 255 people, 61% name a lack of employee recognition and 28% staff turnover or shortages. Eight other reasons, from limited hours to a lack of training, sit at 2% or less. In the previous edition the reasons were operational: inventory and hours.

What is the main reason your customer service got worse?

Among the 51% who said it decreased, about 255 respondents



THIS SURVEY VS THE PREVIOUS EDITION

Operations then, people now

PREVIOUS EDITION	
Very good service	**38%**
Service decreased	**33%**
Why it got worse	**Operational:** inventory availability, hours of operation

THIS SURVEY	
Very good service	**13%**
Service decreased	**51%**
Why it got worse	**Lack of employee recognition** (61%), staff turnover or shortages (28%)

So what: the report reads the 51% as attributing the decline almost entirely to recognition and turnover, and takes that as engagement showing up in service quality. The survey did not link individual answers across questions, so it shows the pattern, not the mechanism.

Subgroup sizes derived from the published shares: about 45 whose service improved, about 255 whose service got worse.

IN SHORT

Workers grade their own service harshly: 57% not very good, and 51% say it slipped over the year. Where it improved, a loyalty program, new processes and training got the credit. Where it got worse, 61% point to a lack of recognition and 28% to turnover.

In the previous edition the complaints were about inventory and hours. This time they are about people. Next, the tools they work with.

CHAPTER 04

The tools they work with

Most retail frontline workers use one to three tools a day, from the POS to handheld scanners, and 80% say their company does not give them the tools they need to succeed. The ones using the most tools were the most likely to say they have what they need.



TOOLS IN USE

53%

Most work with one to three tools a day

Counting the POS, digital signage, handheld scanners and the like, 53% use one to three tools every day, 34% use four to seven and 12% use eight or more. Shares are as published and sum to 99%.

How many tools do you use every day?

POS, digital signage, handheld scanners and the like · n = 500



1 to 3 tools	265 · 53%
4 to 7 tools	170 · 34%
8 or more tools	60 · 12%

Shares are as published and sum to 99%. Five marks stand in for the rounding gap and are not drawn.

THE RIGHT TOOLS

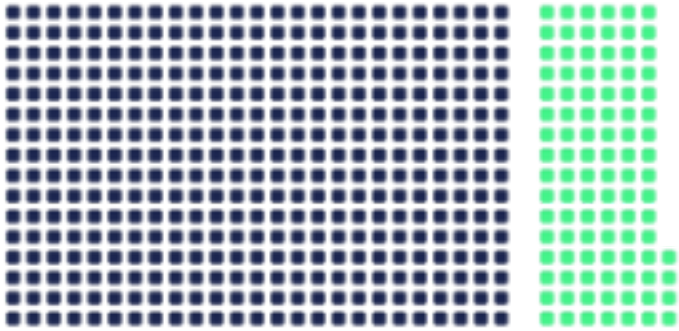
80%

Four in five say they lack the tools to succeed

80% say their company does not provide the tools they need to be successful; 20% say it does. The report notes that those using eight or more tools were more likely to say they have what they need, and reads that as a question of the right tools rather than more of them.

Does your company provide the tools you need to be successful?

n = 500



No, it does not	400 · 80%
Yes, it does	100 · 20%

IN SHORT

Most workers run a small kit, one to three tools a day, and 80% say it is not the kit they need. The group using the most tools was the most likely to feel equipped.

The report's advice is to find out what workers need before adding anything. Next, how the company talks to them.

CHAPTER 05

Communication from head office

84% of retail frontline workers say head office does not understand the value they bring, and 80% say their company does not communicate well. Only 21% have a company email address, down from 54% in the previous edition.

84%

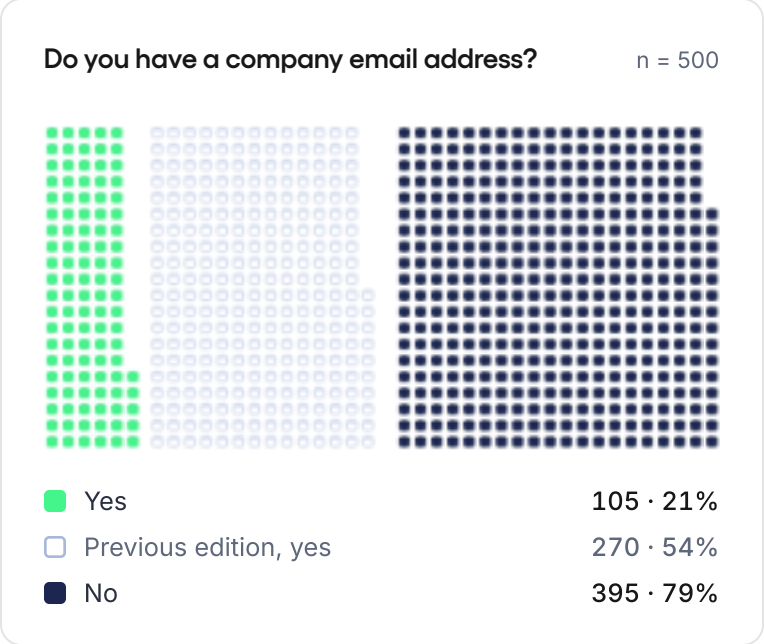
say the company does not understand the value they personally bring. In the previous edition, 45% said so.

COMPANY EMAIL

21%

Only one in five has a company email address

21% of retail frontline workers have a company email address. In the previous edition, 54% did. Whatever head office sends by email, four in five frontline workers cannot receive on a company account.



FEELING UNDERSTOOD

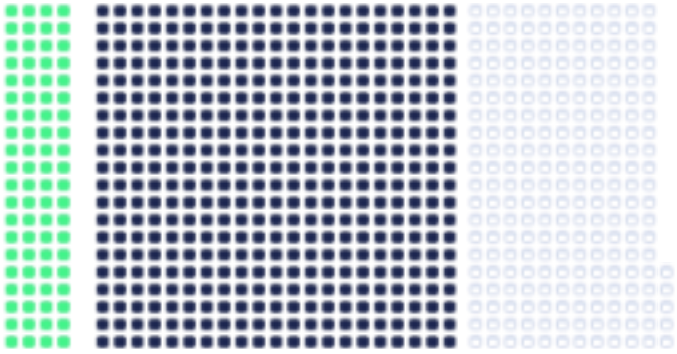
84%

Head office does not see my value, say 84%

Asked whether the company understands the value they personally bring, 16% said yes and 84% said no. In the previous edition, 45% said no. The report's reading is that communicating value comes back to recognition.

Does the company understand the value you personally bring?

n = 500



Yes, it does	80 · 16%
No, it does not	420 · 84%
Previous edition, no	225 · 45%

HOW WELL

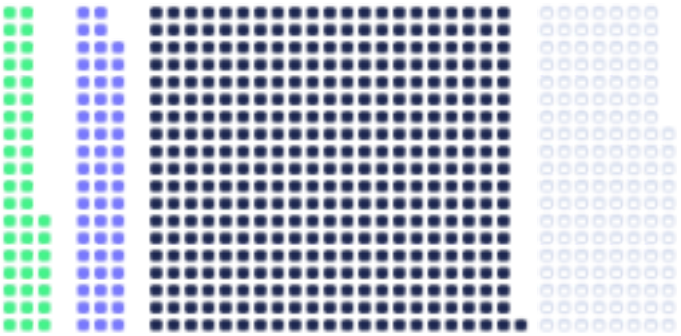
80%

Four in five say it does not communicate well

9% say their company communicates very well, 11% somewhat well and 80% not well. In the previous edition, 29% said not well at all.

How well does your company communicate with you?

n = 500



Very well	45 · 9%
Somewhat well	55 · 11%
Not well	400 · 80%
Previous edition, not well	145 · 29%

THE PAST YEAR

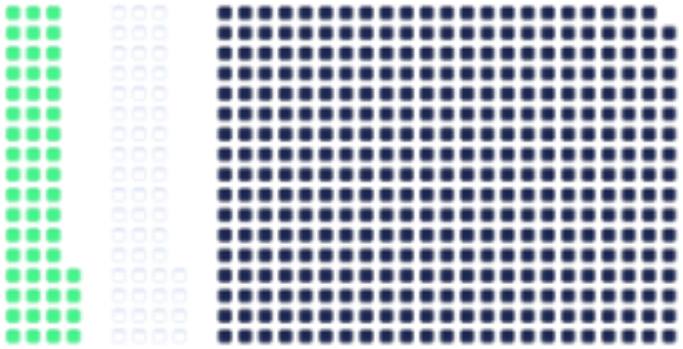
78%

Communication fell for nearly four in five

Over the past 12 months, 11% say communication from the company increased, 11% say it stayed the same and 78% say it decreased.

Over the past 12 months, has communication from your company increased, decreased or stayed the same?

n = 500



Increased	55 · 11%
Stayed the same	55 · 11%
Decreased	390 · 78%

CHANNELS

Most of it is spoken. They would rather be phoned.

About half say their company communicates with them verbally, then by phone; email, text, an app and posted notices each take a small share, with signage and other channels smallest. Asked how they would prefer to be reached, workers chose their phone, by call, text or app, over email, notices or signage. These shares were read from the report's charts, so they are shown as a ranked list without percentages.

How does your company communicate with you?

Primary channel, ranked; read from the published chart

1. **Verbally, in person**
   About half of respondents.
2. **Phone**
   The next largest share.
3. **Email, text, app and posted notices**
   Each a small share.
4. **Signage and other**
   The smallest shares.

Preferred channel: the phone, by call, text or app, ahead of email, posted notices and signage. Read from the published chart; percentages are not quoted.

THIS SURVEY VS THE PREVIOUS EDITION

Head office got further away

PREVIOUS EDITION

Company email	**54%** had one
Value understood	**45%** said head office does not understand their value
Communicates well	**29%** said not well at all

THIS SURVEY

Company email	**21%** have one
Value understood	**84%** say head office does not understand their value
Communicates well	**80%** say not well

So what: the report calls this a failure to communicate from the home office and tells leaders not to be afraid to overshare. Only 16% feel their value is understood, and the report ties that back to recognition.

Both editions are samples of 500 retail frontline workers; the comparison is between editions, not a panel of the same people.

IN SHORT

Communication from head office is thin and getting thinner: 80% say the company does not communicate well, 78% say it decreased over the year, and only 21% have a company email. 84% say head office does not understand the value they bring.

The report's advice: overshare, and say out loud what people are worth. Next, whether they plan to stay.

CHAPTER 06

Future and commitment

89% of retail frontline workers say they are likely to quit their job in the next 12 months, up from 52% in the previous edition. 77% do not believe their company will be in business in five years, and almost all of them give the same reason.

89%

say they are likely to quit their job in the next 12 months. In the previous edition, 52% said so.

LIKELY TO QUIT

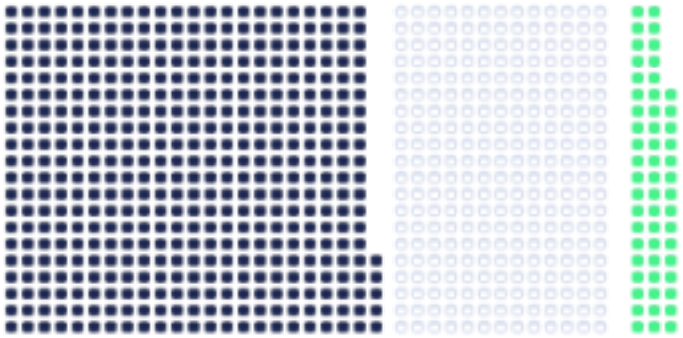
89%

Nine in ten expect to quit within the year

89% say they are likely to quit their job in the next 12 months and 11% say they are not. In the previous edition, 52% said they were likely to quit. The outlined queue is that earlier answer at the same scale.

Are you likely to quit your job in the next 12 months?

n = 500



Yes, likely to quit	445 · 89%
Previous edition, likely to quit	260 · 52%
No	55 · 11%

FIVE YEARS OUT

77%

Three in four doubt the company lasts five years

Asked whether they believe their company will be in business in five years, 23% said yes and 77% said no.

Do you believe your company will be in business in five years?

n = 500



Yes, it will	115 · 23%
No, it will not	385 · 77%

WHY IT WOULD FAIL

95%

Almost all of them name a lack of recognition

Among the 77% who expect the company to fail, about 385 people, 95% give a lack of employee recognition as the reason. Poor leadership, not making customer service a priority, not investing in technology and a bad storefront location get 1% each. In the previous edition the reasons were operational: budgeting, demand and technology.

Why do you think your company will not be in business in five years?

Among the 77% who said no, about 385 respondents



Lack of employee recognition	**95%**
Poor leadership or management	1%
Not making customer service a priority	1%
Not investing in technology for better service	1%
Bad storefront location	1%

IN SHORT

Nine in ten expect to leave within the year, and three in four do not expect the company to be around in five. Asked why, 95% say the same thing they have said throughout this survey: a lack of recognition.

The report's conclusion is that workers want to be seen, appreciated and valued, and that the rest follows from taking care of the people. The takeaways are next.

ACTIONABLE TAKEAWAYS

Five takeaways for retail leaders

Each pairs what the survey found with what the report says to do about it. The thread through all five is the same: the workers asked to be rewarded, recognized and equipped, in that order.

TAKEAWAY 1

Focus on cultivating engagement

10% are highly engaged and 99.8% say their engagement fell over the year. The report cites studies that consistently find engagement goes with profitability, productivity and customer ratings.

> Give people something to strive for: incentives and rewards, a gamified workday, friendly competition between shifts and between stores.

TAKEAWAY 2

Recognition can be simple

21% asked to have their performance recognized, and 84% say head office does not understand the value they bring.

> Honor someone at the all-staff meeting. Give feedback more often than a yearly review. Be vocally generous every day, and say out loud what each person brings.

TAKEAWAY 3

Turnover can be stopped in its tracks

78% see more turnover than ever and 89% expect to quit within the year. The report notes engaged employees are more likely to stay, and more likely to stay where their manager engages them.

> Rewards programs help, but the manager's day-to-day interaction is what changes the culture. Start there.

TAKEAWAY 4

Great service starts with engaged workers

51% say their service got worse, and 61% of them blame a lack of recognition. The report cites a Glassdoor study: the more satisfied the employees, the more satisfied the customers.

> Treat a satisfied, customer-facing workforce as a prerequisite for the customer experience, not a result of it.

TAKEAWAY 5

Put the right tools in their hands

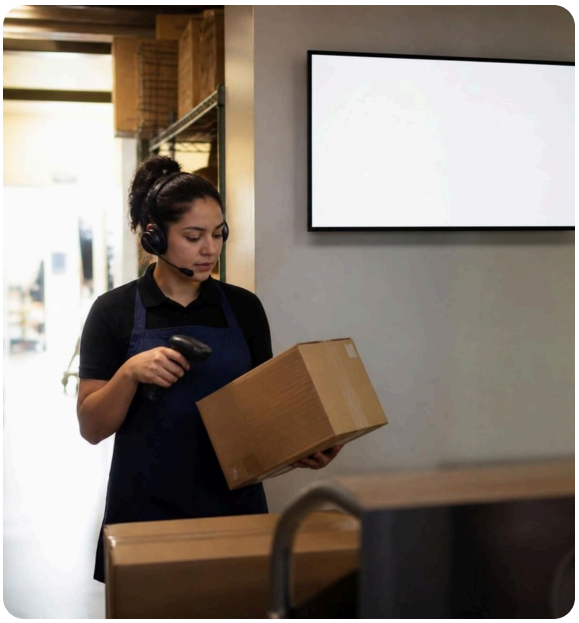
80% say they do not have the tools they need, and those with the most tools were the most likely to say they do. More is not the answer; the right ones are.

> Ask employees what they need before buying. The report's own list: updated POS and inventory systems, buy online pick up in store, self-checkout.

DISPLAI

How Displai uses this report

The three things respondents asked for outside pay, rewards, recognition and better tools, are the three things Displai puts on a screen in the back of house.



1 **Rewards**

Live contests between shifts and between stores, with points that redeem for gift cards and merchandise.

2 **Recognition**

Shout-outs and milestones that post themselves to the screen the moment they happen.

3 **Tools**

The schedule, the day's tasks and what is out of stock, in one place the whole crew can see.

Displai installs the screen, connects it to the POS and runs the programs. The restaurant follow-up to this survey is The Shift Score Report, which pairs these findings with Black Box Intelligence, Cornell, Gallup, Workhuman and IRF data and a calculator.

METHODOLOGY

Who we surveyed and how

We surveyed 500 frontline workers in US retail, all at businesses with a physical location, online via Pollfish using organic sampling. Percentages are shares of all 500 respondents unless a figure says otherwise. Comparisons to the previous edition and to two editions earlier refer to earlier rounds of the same survey.

Definitions. Frontline worker means an employee who works in the store, with customers or stock, rather than in an office. The engagement measure is self-rated: respondents chose highly, somewhat or not very engaged, and the report counts not very engaged as not engaged.

Sampling. Organic sampling means respondents were recruited inside partner apps and websites and screened by Pollfish, not drawn from a probability sample. No margin of error applies. Treat gaps of a few points as ties.

Rounding. Figures are reproduced as published, rounded to whole percentages; a few questions sum to 99% or 101%. In the mark fields, a group's size is the published percentage applied to 500, so 59% stands as 295 marks. Figures marked about were read from the original charts and are not used in headlines.

Employment status

Read from the published chart

Full-time	about half
Part-time	about half

The published chart carries no value labels, so the split is shown as about half each rather than as exact shares.

Company size

Number of locations

1 to 12 locations	about 62%
13 to 74 locations	about 23%
75 or more locations	about 12%

Read from the published chart and labelled about for that reason. Small and mid-sized retailers dominate the sample; about one in eight respondents works for a chain of 75 or more stores.

How the marks are counted

Mark fields

One mark per respondent. A group's size is the report's rounded percentage applied to 500. Outlined marks are earlier editions of the same question, drawn to the same scale. The survey did not link an individual's answers across questions, so a mark's place in one field says nothing about its place in another: the 50 highly engaged marks are not the 55 who plan to stay.

KEY STATISTICS

Ten numbers to take with you

1. 59% of US retail frontline workers say they are not very engaged at work; 10% are highly engaged.
2. 99.8% say their engagement at work decreased over the past 12 months; one respondent in 500 said it increased.
3. 56% blame falling engagement on being overworked because of staffing shortages; 30% on coworkers leaving or being fired.
4. 78% see more turnover than ever in their company, up from 36% in the previous edition of the survey.
5. 89% say they are likely to quit their job in the next 12 months, up from 52% in the previous edition.
6. Asked what would help outside pay, 24% chose incentives and rewards, 21% recognition of their performance and 16% better tools.
7. 51% say the customer service they provide got worse over the year; of those, 61% blame a lack of employee recognition.
8. 80% say their company does not provide the tools they need to be successful.
9. 84% say head office does not understand the value they bring, and 80% say the company does not communicate well.
10. 77% do not believe their company will be in business in five years; 95% of them cite a lack of employee recognition.

CITE THIS REPORT

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