

From Unsung Heroes to Quiet Quitters



A Comprehensive Study of Frontline
Workers in the UK and Germany



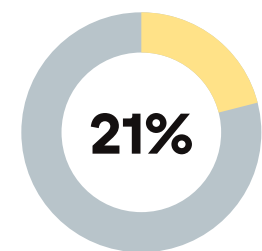
Special Preview



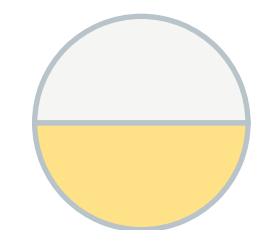
Key insights at a glance

1 Motivation and Attrition

Frontline attrition has cooled – but beware the **'quiet quitters.'**



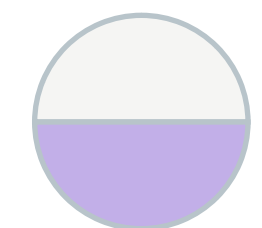
of frontline employees admit to doing the **bare minimum.**



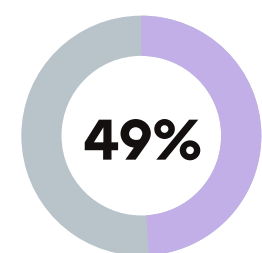
Nearly half of these quiet quitters plan to stay put for the next 3+ years.

4 Career growth

Frontline employees **crave development** but lack adequate learning opportunities.



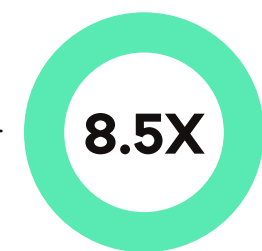
Less than half believe it's possible to climb the ladder at their company.



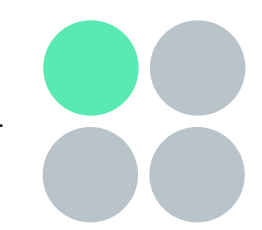
Only 49% say they **received proper training** for their current role.

2 Satisfaction

Recognition has the **greatest impact** on job satisfaction.



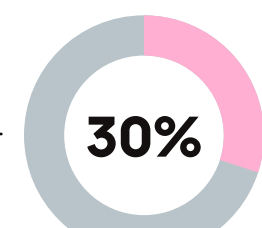
Frontline employees who feel appreciated are 8.5X more likely to be **satisfied-very satisfied.**



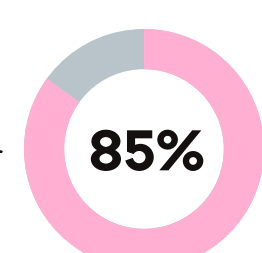
Nearly 1 in 4 frontline employees feel they **aren't adequately recognised** for their work.

5 Technology

Frontline workers **need – and want** – tech upgrades.



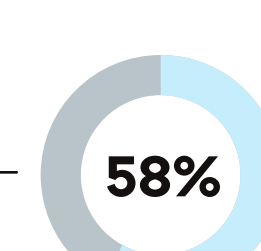
use **unofficial messengers** like WhatsApp to exchange information at work.



are open to using an **employee app** on their personal device.

3 Well-being

Co-workers are key to well-being – supporting more than friends, family, and managers.



of frontline workers experience workplace stress or burnout at least **once a month.**



The survey in numbers

Company Size

500-10K+

Employees

Frontline Employees

363

Managers

637

Employees

Industry

7

Industries

Country

2

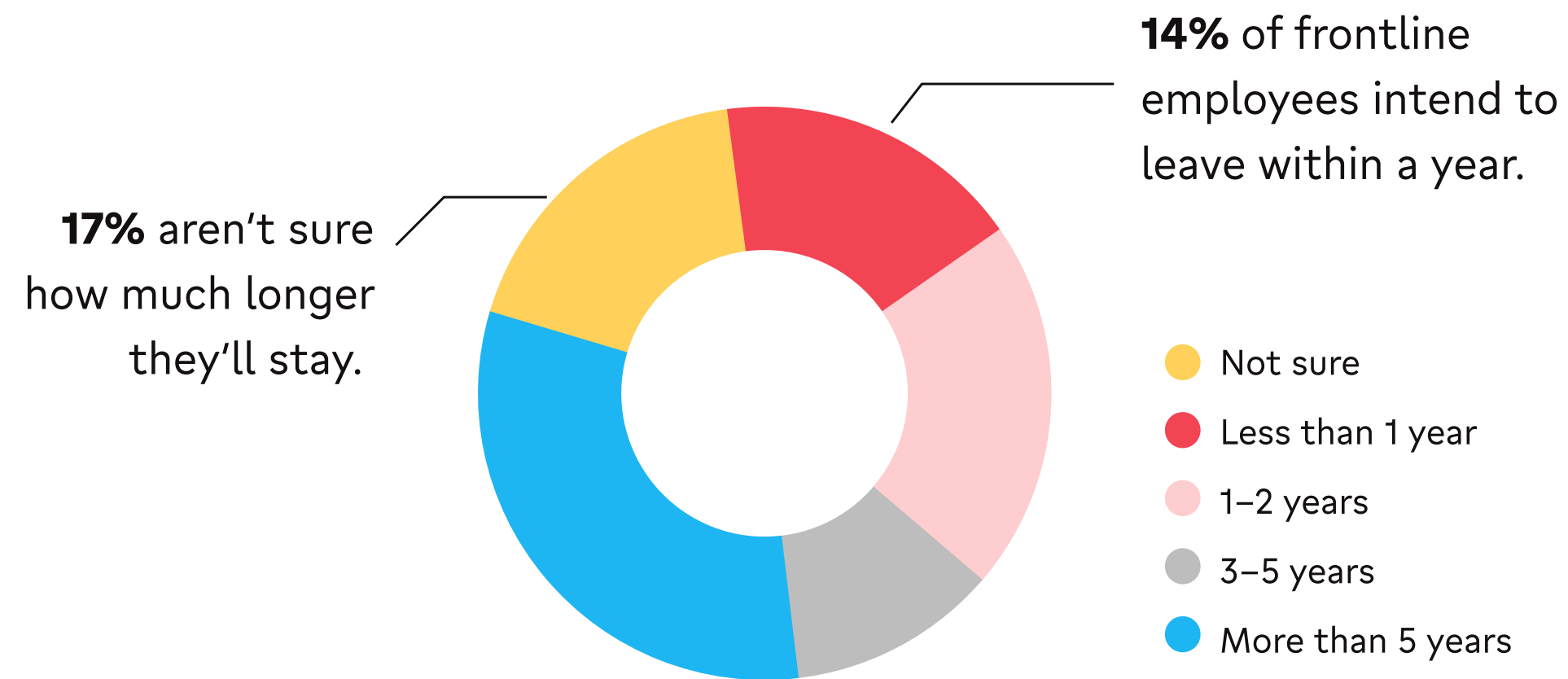
UK & Germany

Today's frontline employees are more likely to stay with their companies.

Frontline attrition has cooled

Less frontline employees are planning to leave their jobs in the **next 12 months** than during the Great Resignation, signalling a return to more 'normal' levels.

How much longer frontline employees expect to stay at their current company:



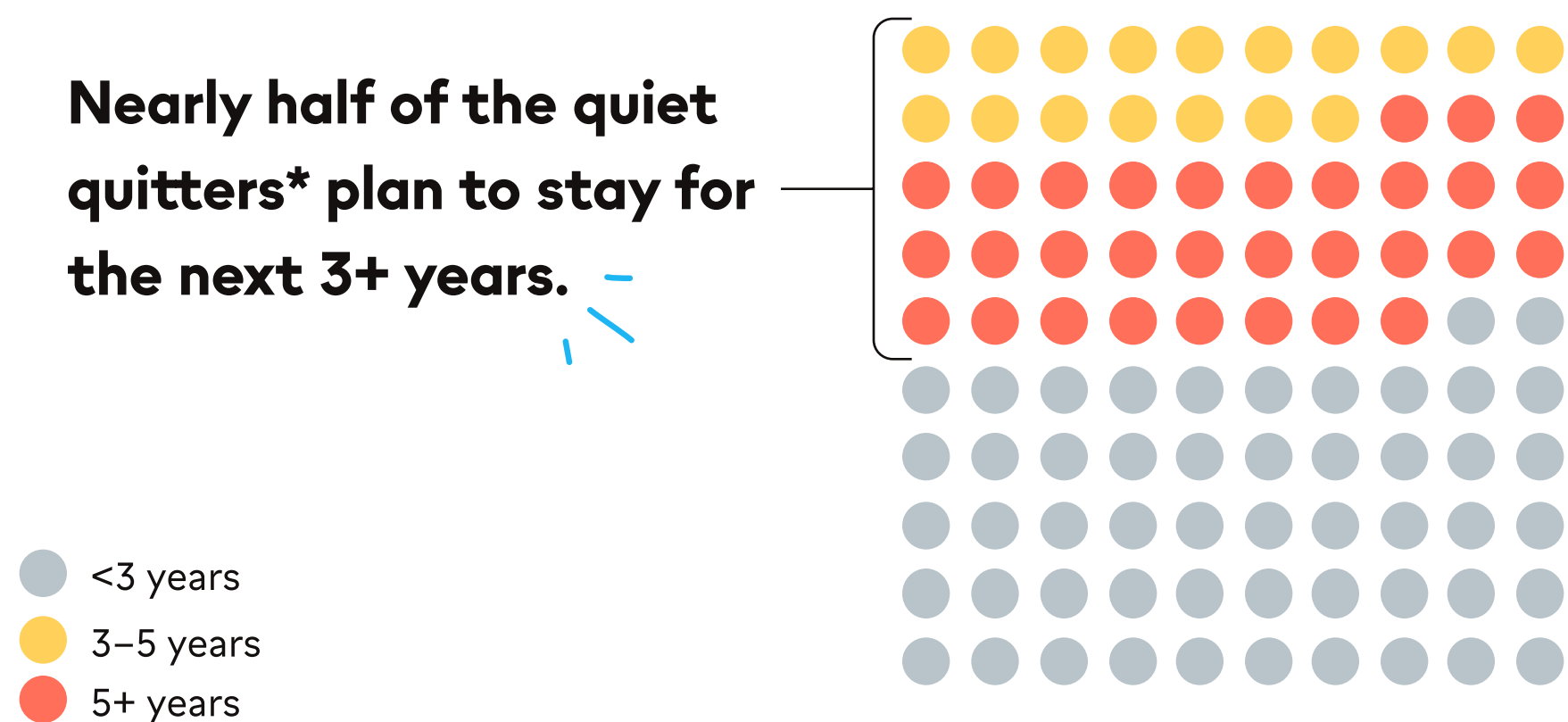
But many are doing only enough so as not to get fired.

Beware of quiet quitters

Employees aren't necessarily happier: **21% of frontline employees admit to doing the bare minimum.** New jobs may simply be harder to come by, as vacancy levels continue to fall in the UK.

How much longer 'quiet quitters' plan to stay at their current company:

Nearly half of the quiet quitters* plan to stay for the next 3+ years.



*Agreed to strongly agreed with 'I do the bare minimum needed to keep my job' or 'I do not feel present and motivated most of the time' or disagreed to strongly disagreed with 'I usually feel present and motivated and willing to go the extra mile when needed' or 'I feel present and motivated more often than not.'



Action

Focus on increasing engagement rather than retention, especially among **frontline managers.** Frontline managers play critical roles in engaging employees, but show **low levels of engagement themselves**, citing poor leadership.

We recommend introducing a **two-way communication system** where managers can join a supportive community, receive important news and updates, and give feedback and input to company leadership.

Recognition and appreciation has a big impact on job satisfaction.

The biggest differences reported by frontline employees who are satisfied vs dissatisfied at work:

		Difference	Satisfied	Dissatisfied
1	I feel recognised and appreciated	68 points	72%	4%
2	My working conditions are safe and comfortable	66 points	78%	12%
3	Communication at my company is effective	63 points	64%	1%
4	My workplace culture is supportive	61 points	69%	8%
5	I see opportunities to progress my career	56 points	62%	6%

But many employees feel under-appreciated.

Frontline employees who feel appreciated are:

3.4x more willing to go the **extra mile**

1.9x more likely to stay **longer than one year**

8.5x more likely to **be satisfied** with their job



Less than half (47%) of frontline workers feel recognised and appreciated.



Action

Invest in recognition programs like employee awards, milestone celebrations, and shout-outs. Enabling employees to easily participate on **company communication platforms** has an even greater effect on engagement.

Intelligent assistants, like Flip Flows, can **help you deliver these programs efficiently and effectively**. They automatically prompt and guide employees through nomination processes and can post results to group channels - all in the same app that they use every day.

Which industry is happiest/unhappiest?



Construction

Highest average score across all 8 factors* including working conditions and recognition.

73% report good-excellent well-being, the second highest score across industries.**

Low frequency of stress. 5% say they feel burned out every day or multiple times a week.

Second highest willingness to go the extra mile (72%). Hospitality was first (73%).

3% feel less valued than office-based colleagues. 67% feel **more valued**.

67% say they're satisfied or very satisfied, far above the cross-industry average of 55%.

Head to Head

Happiness factors

Well-being

Stress and burnout

Motivation

Value vs office peers

Satisfaction



Retail



Lowest average score for 4 factors, including flexibility and compensation.

Only 44% report good-excellent well-being, the lowest score across industries.

High frequency of stress. 20% say they feel burned out every day or multiple times a week.

Lowest willingness to go the extra mile (55%) compared with other industries (average 62%).

23% feel **less valued** than office-based colleagues, the lowest sentiment of all industries.

Only 45% say they're satisfied or very satisfied with their current job.



Retailers take note

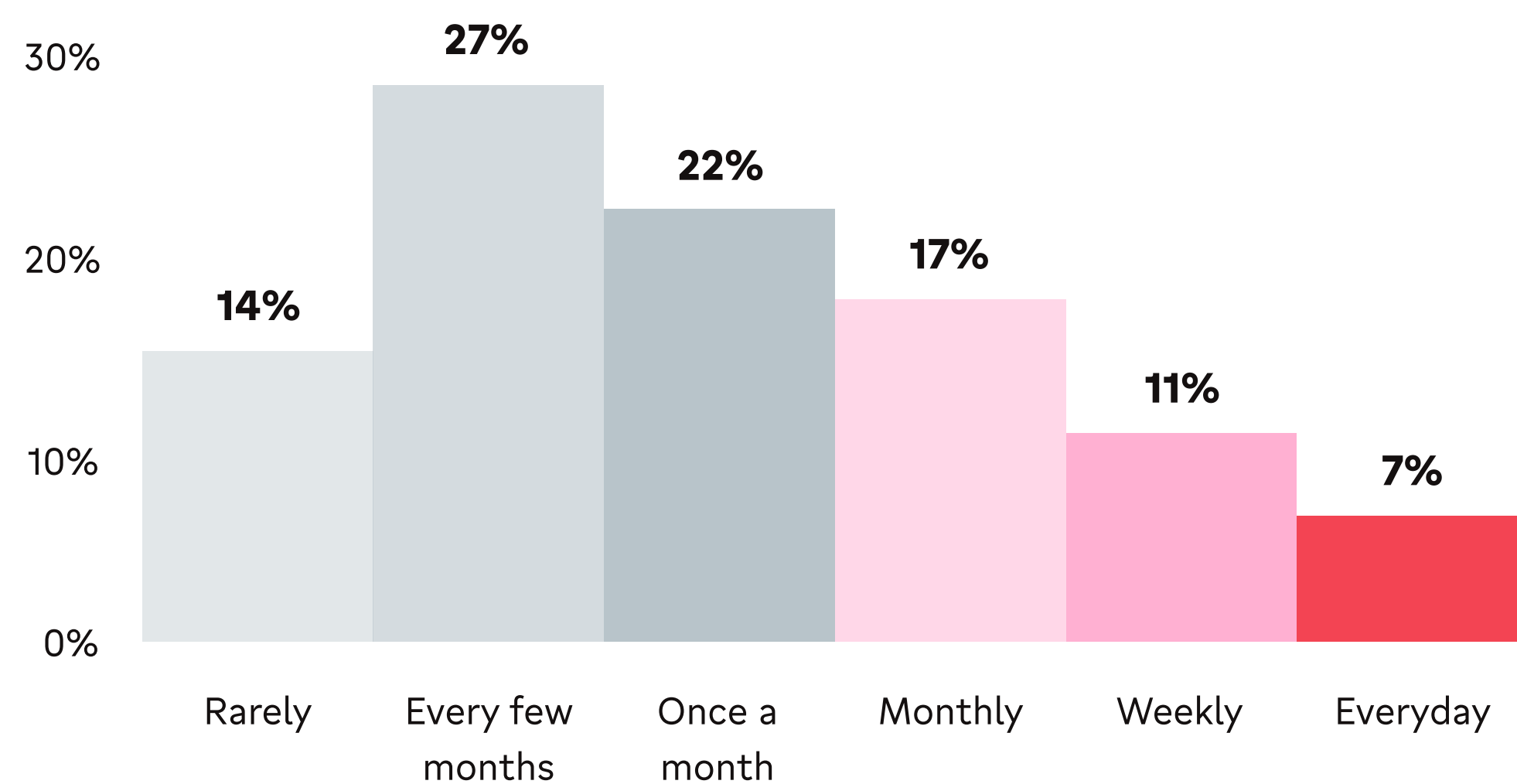
The 'face' of your business might be struggling on multiple fronts, harming your competitiveness for talent – and wallets. Get things back on track by tackling their biggest concerns: poor leadership and recognition.

Bring employees together on an **engaging communication platform** where they can get relevant updates from management, provide feedback, and publicly recognise peers. Retail employees say perks and rewards for performance motivate them most, so consider using this channel to **run regular store 'challenges', celebrate winners, and distribute prizes.**



Over half of frontline employees experience workplace stress or burnout at least once a month.

How often do you feel stressed at work?



'Burnout predicts severe injuries.'

Study by [Kirsi Ahola et al., 2013](#)

Good relationships with colleagues are critical to well-being.

Co-workers play a big role in shoring up well-being and supporting employees through times of stress – more than friends and family. Good relationships with managers are also critical.

What thriving employees say contributes to their well-being at work

	All	Germany	UK
Good relationships with colleagues	66%	55%	56%
Job security	47%	45%	49%
Good relationships with managers	43%	45%	42%
Predictable hours	41%	39%	43%
Work is recognised / appreciated	36%	35%	37%

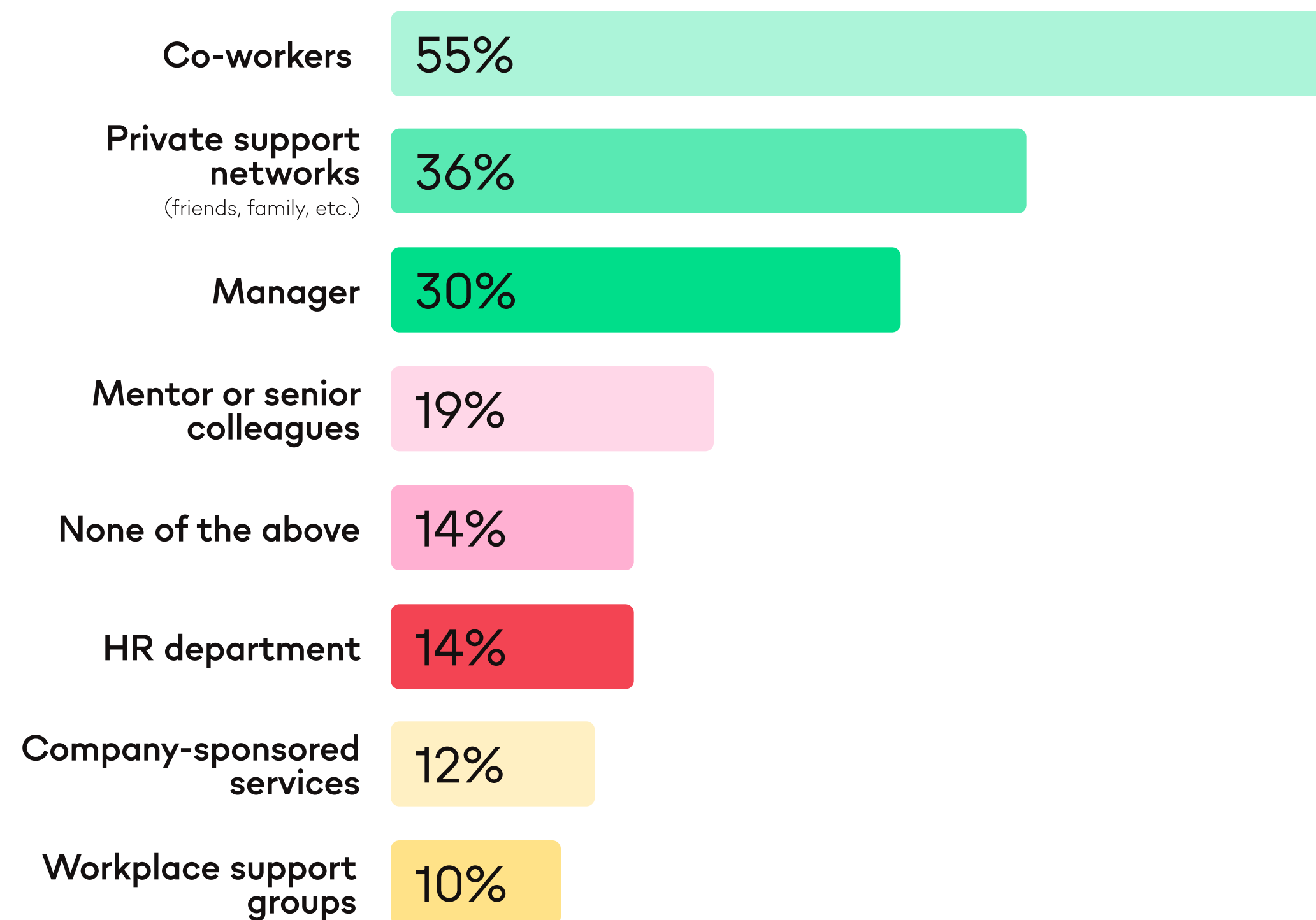


Action

'Work besties' have multiple positive effects on businesses, not least on employee well-being. Foster social connection by creating relaxed spaces for employees to **share non-work-related activities**. Favourite examples from our customers include **group chats** for hobbies and interests (e.g. pets), **comfy spaces** for breaks and catch ups, regular **lunch dates**, and **team volunteering**.

Only 30% of frontline employees cited their manager as a top supporter during times of work-related stress.

Who supports you most during times of work-related stress?



Action

Good frontline managers are core to thriving employees – but our research suggests many employees don't get the support they need.

To boost well-being and prevent burnout across your organisation, prioritise **empathetic leadership training** for frontline managers and **integrate best practices** (like regular 1:1s) into everyday operations. **Post-training follow-up** is key: create a central channel where managers can seek advice, get support, and share learnings – with you and their peers.

Frontline employees want to learn and grow. But most don't get proper training for their current role.

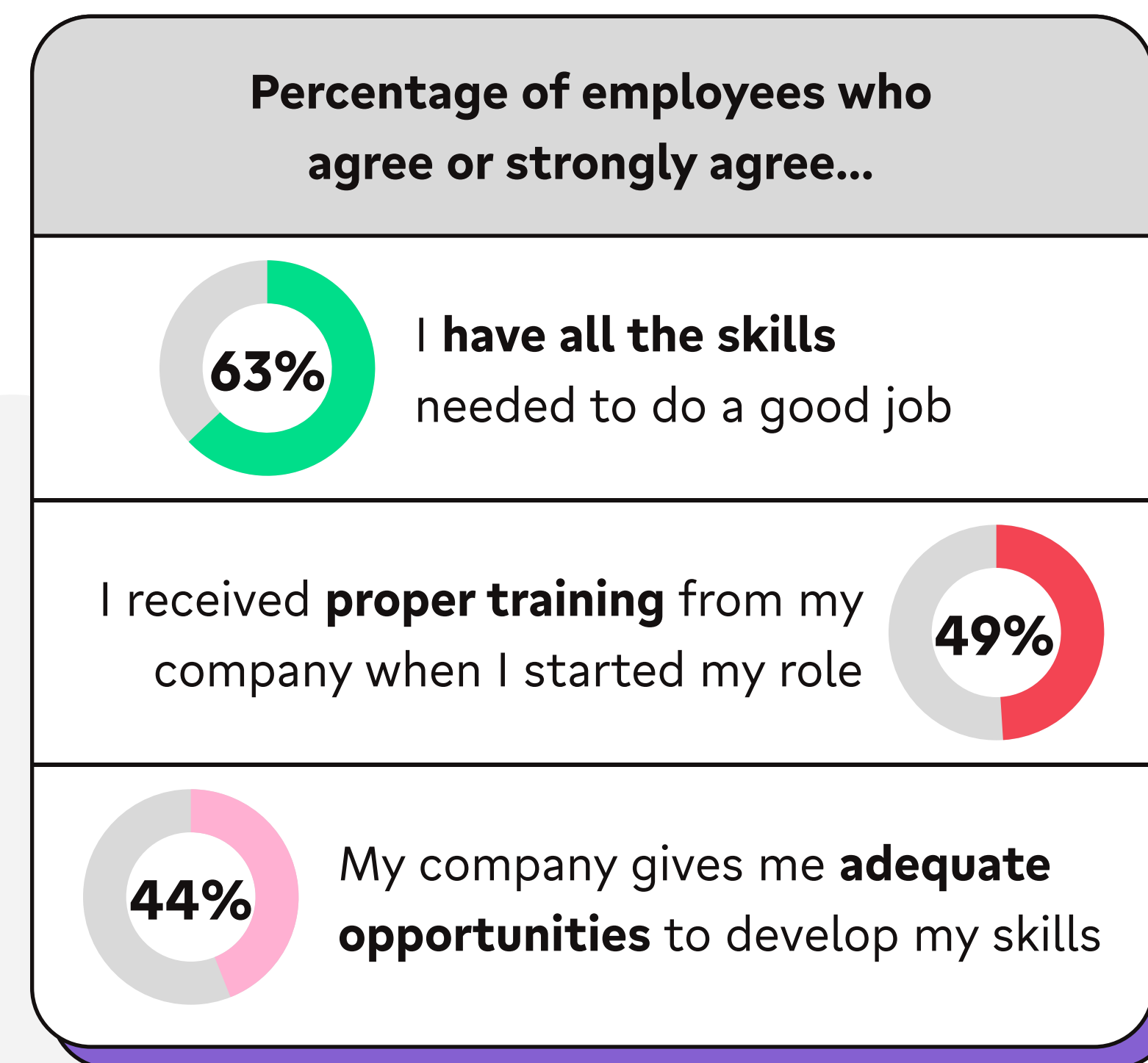
* Limited professional growth prospects lead to low engagement and high attrition of ambitious staff

48% believe it's possible to **climb the ladder** at their company

48% of demotivated employees said a **lack of professional growth** is a key reason.

20% of those who plan to leave in the next year cited a **desire for professional growth**

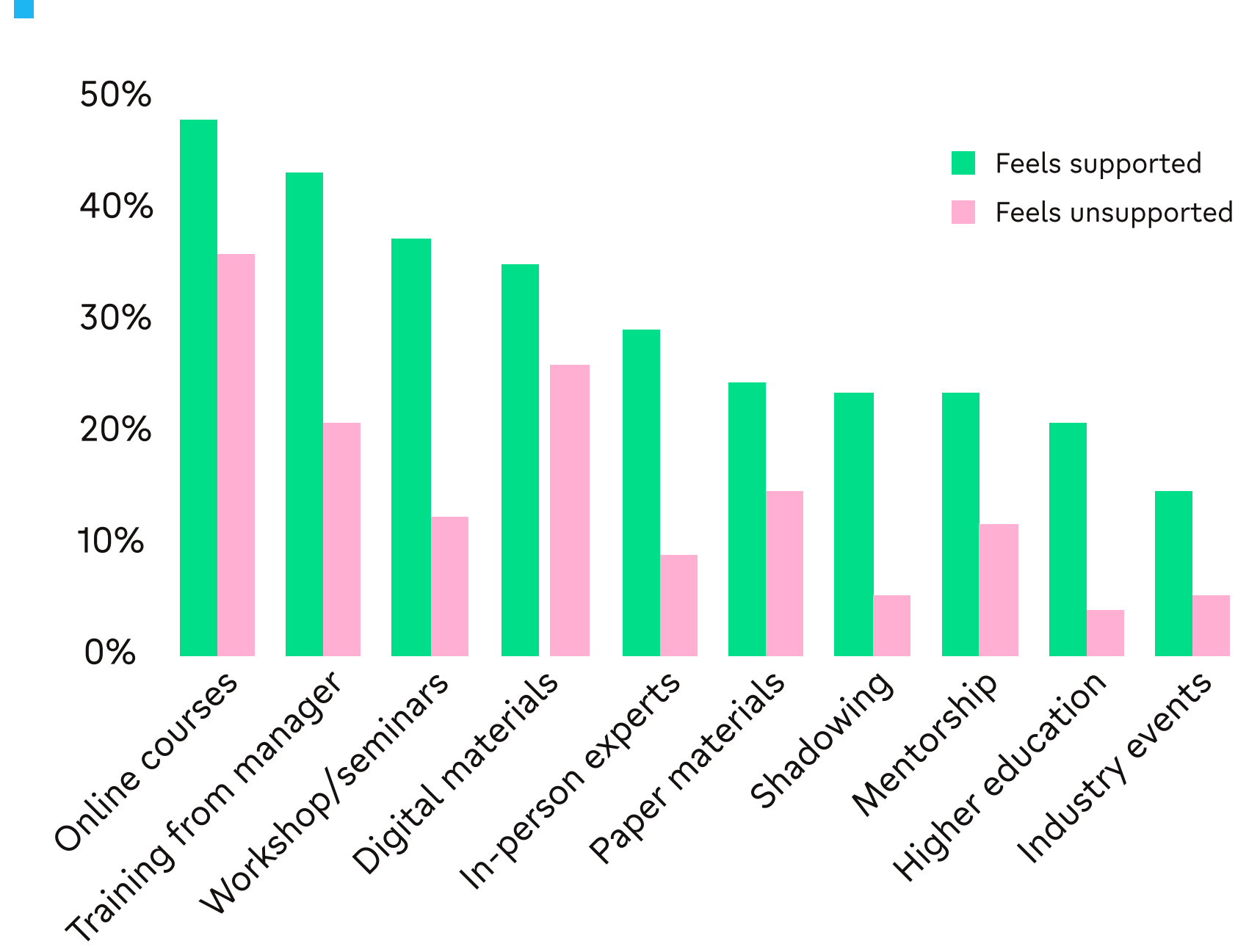
* Employees' perception of their learning & development opportunities is lukewarm



Employees who feel most supported have more access to a wider variety of learning opportunities. ✨

✨ Employees who feel unsupported have less access to all learning initiatives, especially those delivered face-to-face

How does your company support you to develop your skills?



Action

Online courses and materials provide a strong foundation for delivering training at scale. Pair with practical training from managers and experts to make employees feel supported in their growth.

You can get the best of both worlds by **live streaming training with experts**. This way, employees can engage and ask questions in real time, and you achieve quality and scale. Employees can watch training later, and you can follow up with **surveys** to get feedback and find out which skill gaps to focus on next.

Leadership training for frontline managers can also be delivered this way, so that managers get the skills, support, and incentives to provide adequate in-person training.

Frontline employees won't use digital tools if the experience is poor or complicated.

Tech Adopters ↑

What do you like about using the digital tools available to you?

Transparency

'Fast and accurate, and no one can say you didn't write a message or notify them as everything is stored clearly and visibly.'

One place

'You have all the tools in one place.'

Speed

'Messages are sent directly to people, and you don't have to wait for them to come to work until you can see them to discuss something.'

Any time

'I can access my payslips and communicate with employees when needed.'

'Easy to access and use at any time 24/7.'

Tech Rejectors ↓

Why don't you use these digital tools available to you?

Slow

'It's such a rat system, takes forever to load, and honestly, a potato has better processing than the digital garbage cans we have at work.'

Unintuitive

'Sometimes there are easier ways to find things than on the intranet.'

Annoying

'Too complicated. Need to enter passwords every time.'

Unhelpful

'It makes my job harder for me.'

Hard to use

'They're complicated.'



But most are open to – and enjoy – using digital tools where the personal benefit is clear.

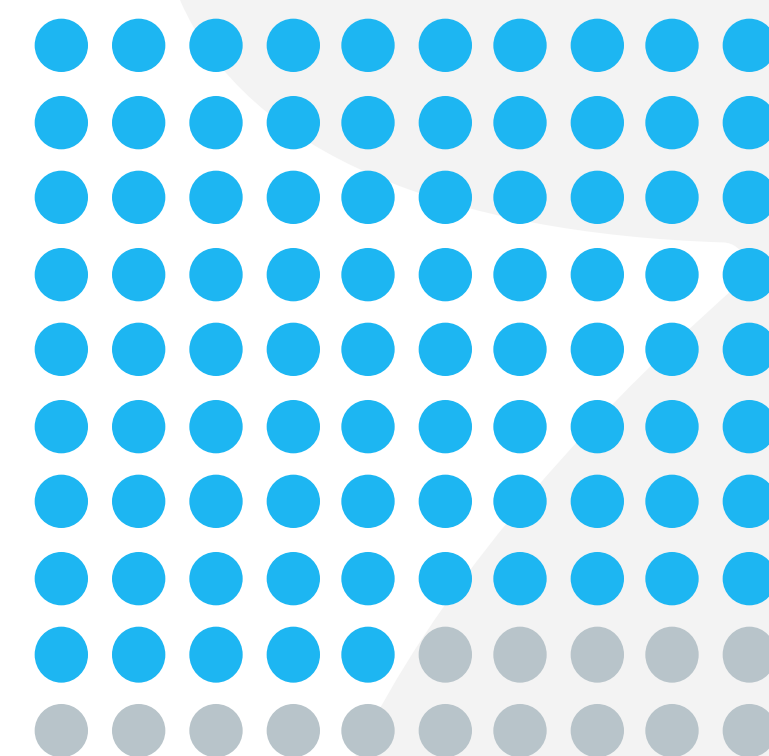


Action

Choose tech that's purposefully designed for the people you want to use it. While it may seem easier to roll corporate software out company-wide, it often leads to poor adoption alongside high IT support needs and costs.

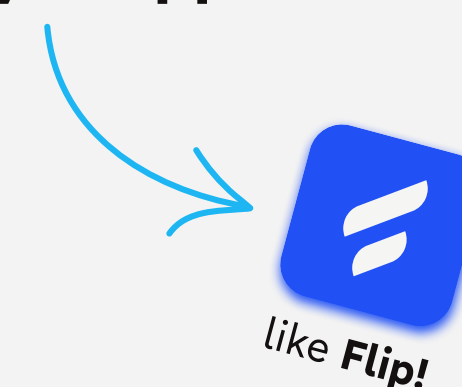
Flip achieves MAUs of 80%+ by anticipating the industrial, behavioural, and technological change needed for a successful project. We recommend:

1. Including **employee representatives** in vendor selection
2. Understanding and prioritising **value for employees**
3. Matching **design and functionality** to employees' unique needs



85% of frontline employees

are at least somewhat open to using an **employee app** on their own phone.



Want more data-based insights to inform your 2025 employee experience strategy? Get free, expert advice from our frontline analysts and HR consultants today.

[Schedule session](#)