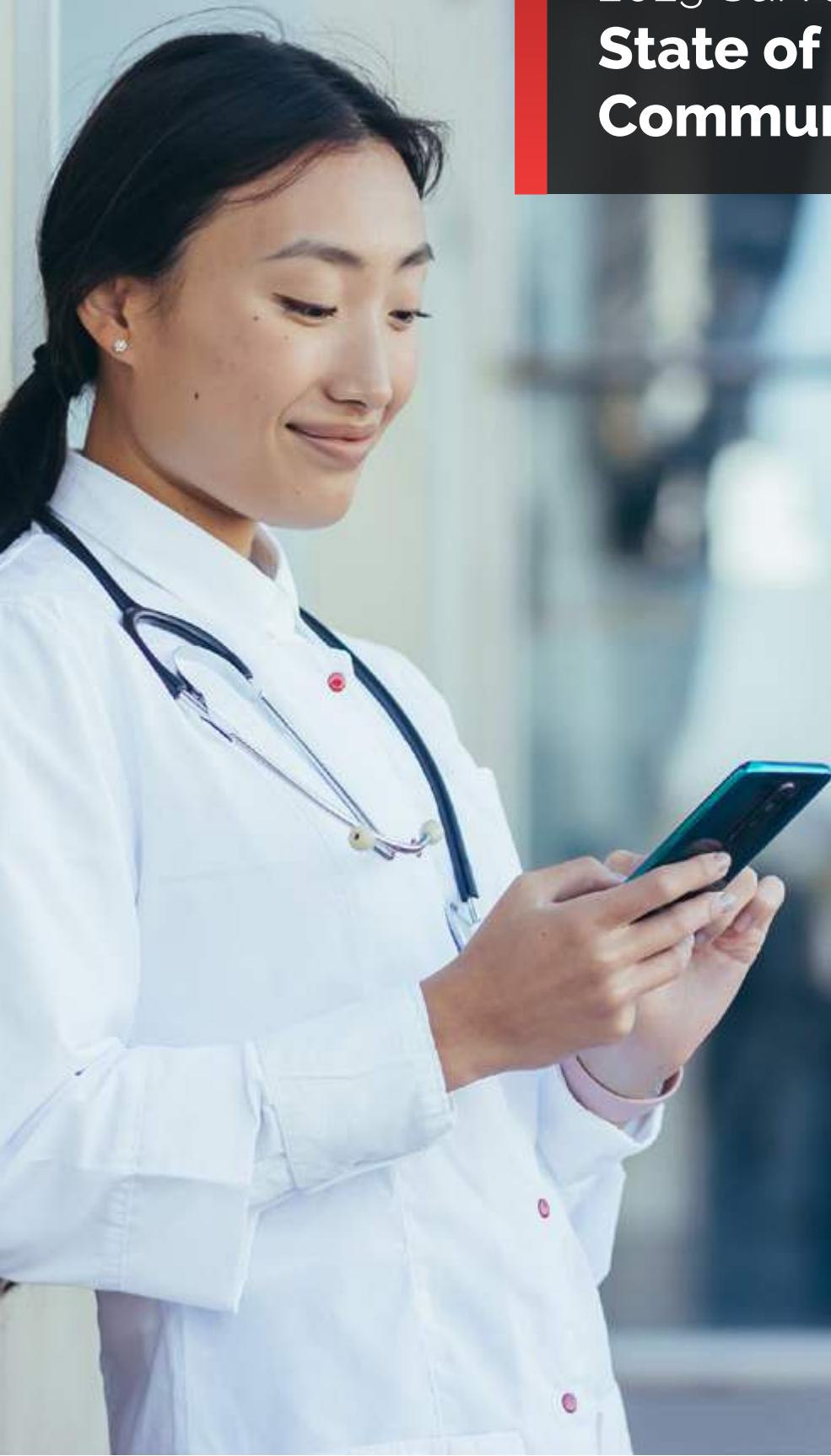




2023 Survey Results

State of Frontline Worker Communication



2023 Survey Results

State of Frontline Worker Communication

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About theEMPLOYEEapp

Executive Summary

theEMPLOYEEapp was created by communication and human resources professionals to address the challenges that organizations face communicating with dispersed and frontline workers. We understand how vital it is to understand our audiences to be able to solve their challenges, properly target information to them, and create the best employee experience.

We are avid readers of annual reports like Edelman's Trust Barometer and the Gatehouse State of the Sector report, but we always want more specific information about trends impacting deskless workers specifically.

That's why in 2021, we conducted our first State of Frontline Worker Communication survey. This year, we have conducted our **second annual survey of 1,000 frontline employees** to get a finger on the pulse of what communication is like on the front lines of organizations.

In this whitepaper, we will review the findings from the survey and offer some insights based on the data that will help you communicate with your own frontline workforce. But first, we wanted to highlight some of the important themes that emerged from the study.

Internal communication is critical to key business indicators. In both 2021 and 2022, we saw a

correlation between higher communication satisfaction rates among managers and metrics like employee engagement, trust, and retention. This indicates that good internal communication has a real and profound impact on our organizations.

Non-manager communication has to be a focus. The gap between managers and non-managers on a variety of questions indicates that we need to be better at directly reaching our frontline employees and we need to get better at training frontline managers to be good communicators.

Companies are embracing more mobile channels than before. In 2021, 44% of employees said they received text messages and 16% said they received communication via an employee app. Those numbers both increased in 2022. Now, 57% of companies are using text to communicate and 25% use an employee app. The workforce is more dispersed than ever and more Gen Zers are starting to work, signaling a shift in how companies are choosing to reach their teams.

I sincerely hope you find this report useful in creating better strategies for your frontline teams this year.

— Clare Epstein, GM, theEMPLOYEEapp



Demographics

We surveyed **1,000 frontline workers** to learn how they feel about the employee communications.

Gender

57% | Female
43% | Male

Are You a People Manager?

59% | Yes
41% | No

Number of Employees

28% | Less than 50
18% | 50 - 250
10% | 251 - 500
9% | 501 - 1000
10% | 1001 - 5000
19% | 5000+
6% | Unsure

Ethnicity*

50% | White
20% | Hispanic
15% | Black
7% | Asian
3% | Multiracial
3% | Arab
1% | Prefer Not to Say or "Other"

*Targeted to reflect the [2020 U.S. Census](#)

Education Level

42% | University
37% | High School
12% | Vocational/Tech College
8% | Post-Graduate Degree
1% | Middle School

Age

9% | > 54
18% | 45 - 54
26% | 35 - 44
32% | 25 - 34
15% | 18 - 24



Demographics

CONTINUED



Hospitality
32%



Healthcare
31%



Manufacturing
24%

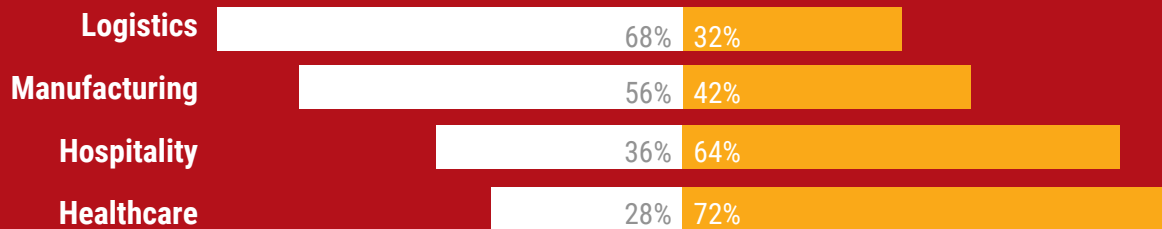


Logistics
12%

Industry Gender Representation

Male

Female



Manager Distribution by Industry

Manager

Non-Manager



Survey Results

Satisfaction With Amount of Communication

Frontline Employees Are Mostly Satisfied With Communication

70% of respondents said they were either “Satisfied” or “Extremely Satisfied” with the communication they receive. This is slightly higher than in 2021, which could be an indication that improved methods of communication are helping companies reach their increasingly dispersed workforces.

How Satisfied Are You With the Amount of Communication You Receive From Your Employer?



Frontline Managers Are More Satisfied Than Frontline Workers

Similar to our 2021 survey, we found that there was **still a gap between manager and non-manager satisfaction** with communication. 76% of frontline managers were satisfied or extremely satisfied, whereas only 60% of non-managers reported that level of satisfaction.

Although both managers and non-managers were marginally more satisfied with the amount of communication they received this year, the gap in satisfaction remained the same (a 16-point difference).

Furthermore, fewer non-managers were “Neutral” about the communication they received, leaving 11% of managers dissatisfied or extremely dissatisfied and 19% of non-managers feeling the same.

Results: Amount

CONTINUED

Disparities Across Industries Narrow Regarding Employee Satisfaction With Communication

On a positive note, we did not see specific industries struggling more with employee satisfaction than others like we saw in 2021. Workers in healthcare, hospitality, manufacturing, and logistics all had very similar satisfaction rates:

Hospitality: 68% satisfied

Healthcare: 71% satisfied

Manufacturing: 69% satisfied

Logistics: 75% satisfied

In 2021, 63% of healthcare employees and 69% of logistics employees said they were “Satisfied” or “Extremely Satisfied.” So, these results show that a lot of the pressures from COVID-19 are slowly abating and helping employees in these industries recover.

The only major dip in satisfaction we saw year-over-year was for manufacturing workers. In 2021, 73% of manufacturing employees said they were “Satisfied” or “Extremely Satisfied,” which dropped 5% in 2022.



Results: Channels

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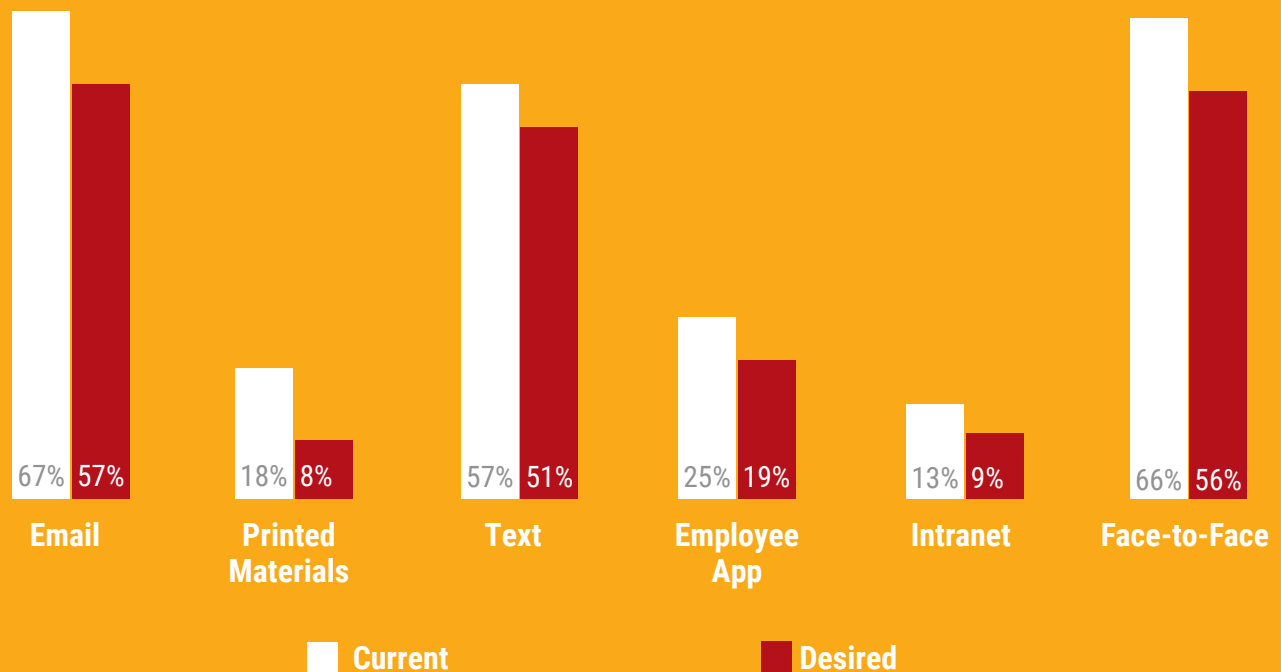
Channel Analysis: Current vs. Desired Channels of Communication

Heavy Reliance Still on Email and Face-to-Face, But Mobile-First Channels Make Up Ground

In 2021, the most commonly used channels for communication were email and face-to-face just like this year's survey findings show. However, more companies now report using text messages and employee apps for communication than they did last year, with demand for these channels also increasing.

Printed materials and intranets continue to be less commonly accessible to frontline workers and also less desired. However, intranets are ideally suited for a deskbound audience, so this is not cause for concern.

How Do You Currently Receive Communication vs. How Do You Want to Receive Communication?



Results: Channels

CONTINUED

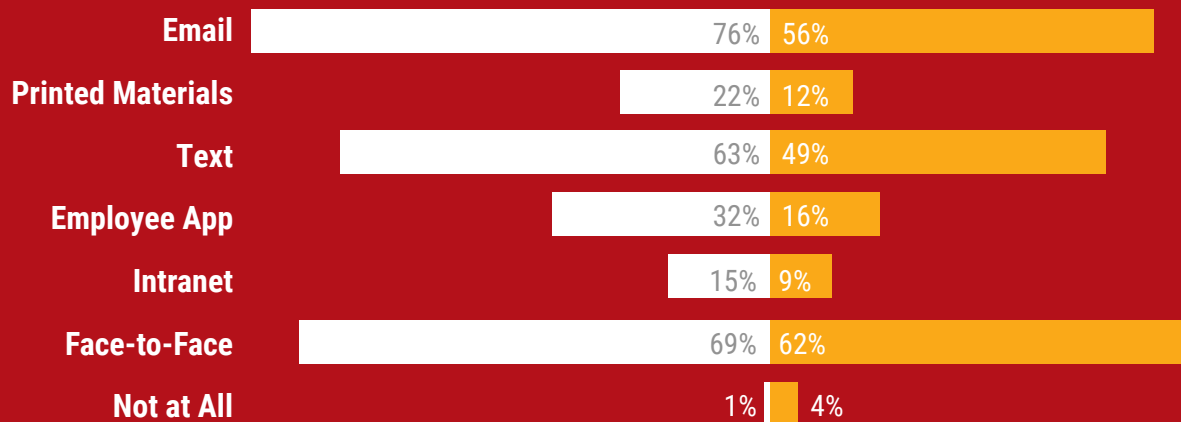
Manager Access to Channels and Communication Exceeds That of Non-Managers

It is possible managers are more satisfied with communication because they receive enough of it on a larger variety of channels. Managers said they had access to each channel more often than non-managers.

Channel Access by Role

■ Manager

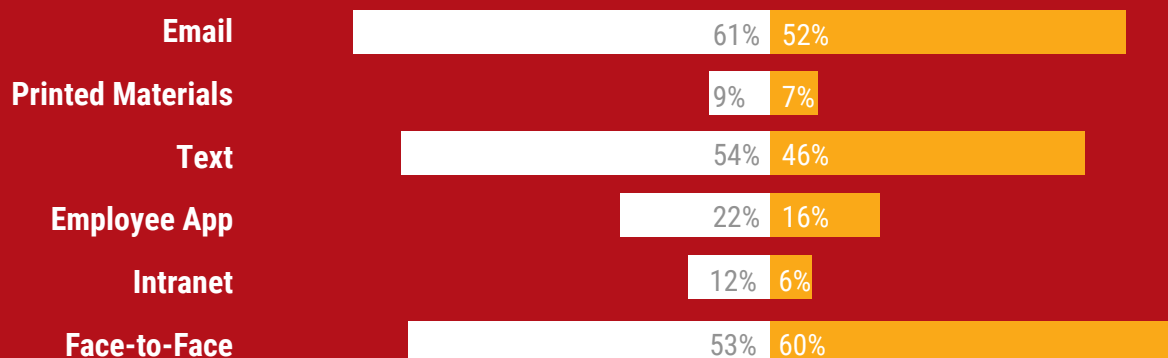
■ Non-Manager



Desired Channels by Role

■ Manager

■ Non-Manager



Results: Channels

CONTINUED

Channel Access Varies by Industry

Understandably, employees in certain industries have more access to certain channels than others. Logistics and hospitality employees, for instance, had significantly less access to email and intranets than employees in healthcare and manufacturing, who often have shared computers or workstations to use.

Other highlights:

- Hospitality and healthcare employees were the most likely to report receiving no communication whatsoever (2%).
- Hospitality (70%) and manufacturing (73%) had the highest reported rates of face-to-face communication.
- The highly mobile employees in logistics (33%) and hospitality (29%) had more access to mobile employee apps.

How Do You Currently Receive Communication?							
	Email	Printed	Text	App	Intranet	In Person	No Comms
Hospitality	56%	16%	57%	29%	10%	70%	2.2%
Healthcare	78%	17%	58%	19%	15%	62%	1.9%
Manufacturing	75%	22%	56%	24%	18%	73%	1.7%
Logistics	55%	14%	59%	33%	6%	53%	1.6%

Age Impacts Channel Preferences: Younger Generations Want More Mobile-Enabled Comms

Regardless of age, printed materials and Intranets tend to be the least popular channels, but 18 - 24 year olds really do not want your Intranet. Mobile-first channels like testing and employee apps also dramatically increase in popularity with younger demographics.

How Do You Want To Receive Communication?						
	Email	Printed	Text	App	Intranet	Face-to-Face
> 54	56%	11%	38%	9%	6%	63%
45 - 54	52%	8%	37%	13%	16%	51%
35 - 44	63%	7%	51%	18%	12%	55%
25 - 34	62%	7%	58%	23%	8%	56%
18 - 24	46%	9%	60%	27%	1%	56%

Results: Topics

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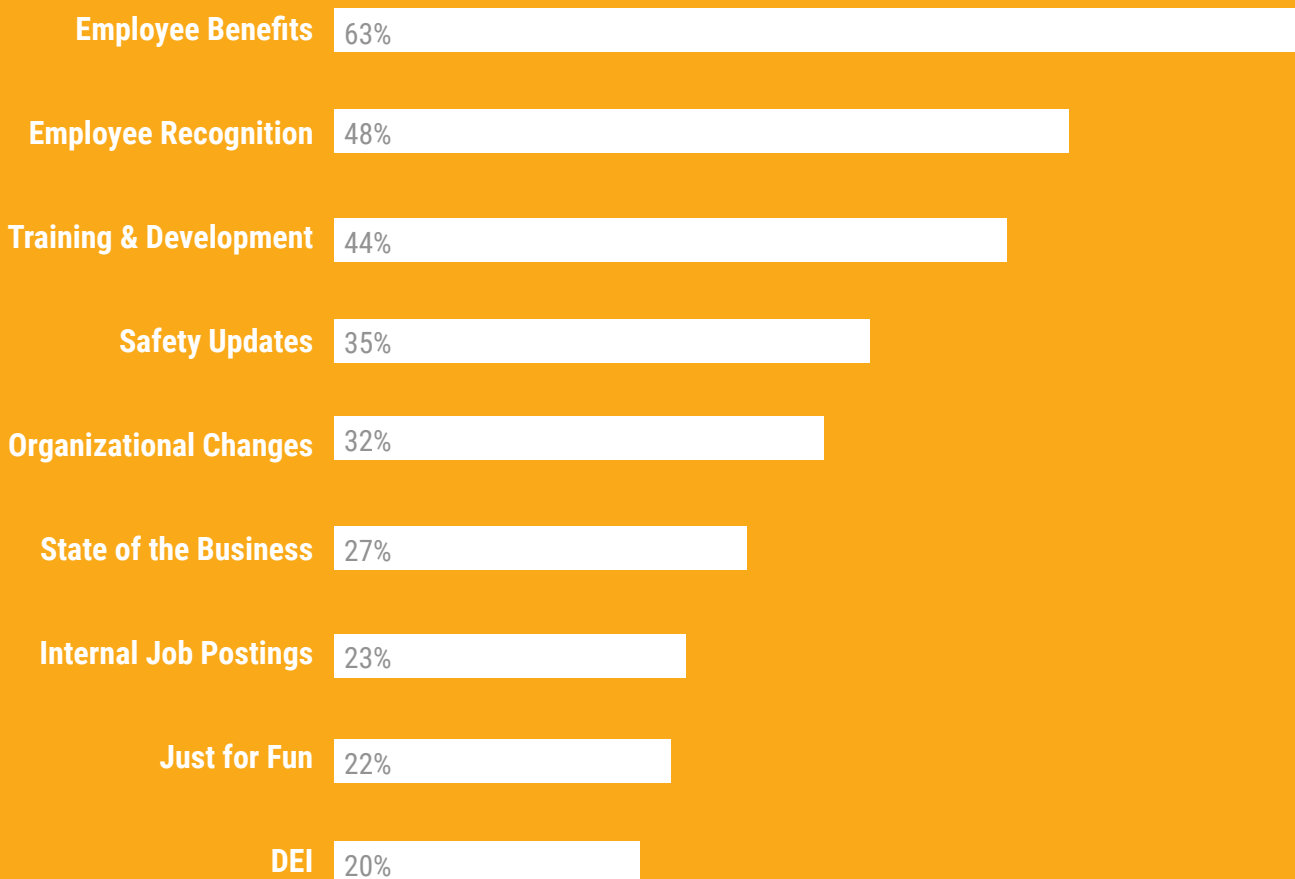
Topics of Interest

What Employees Care About Has Not Changed Much Year Over Year

In 2021, the most popular topics that employees wanted to receive communication about were: Benefits (61%), Recognition (46%), Safety (42%), Training (41%), and Organizational Changes (37%). In 2022, the same five topics came up.

This shows that employees ultimately care about their development and the WIIFM (“What’s in it for me?”). If we cannot provide this information, we are missing out on a huge opportunity for engagement.

What Topics Would You Like Covered in Communications From Your Employer?



Results: Topics

CONTINUED

Role and Gender Impacts on Most Important Topics to Employees

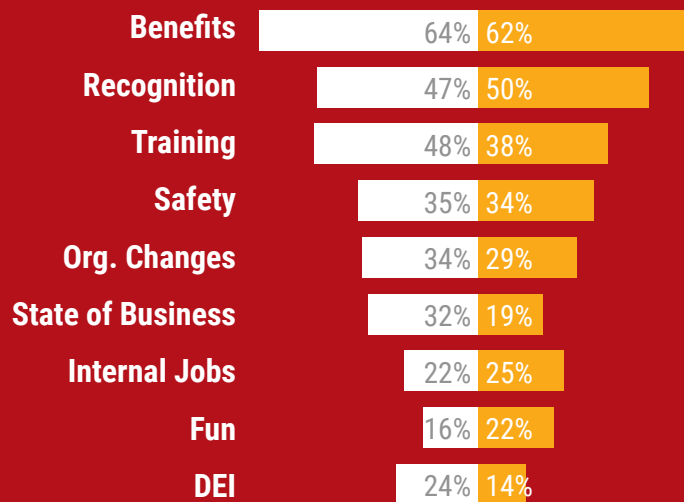
Managers and non-managers largely agree on topics, except managers were much more interested in DEI, training, and the state of the business than non-managers.

Men and women largely agree on what topics are important, except in a few instances. Women were more likely to want safety and just-for-fun content than men. And men were much more interested in the state of the business than women. These gender differences mirror our 2021 results.

Topics of Interest Based on Role

■ Manager

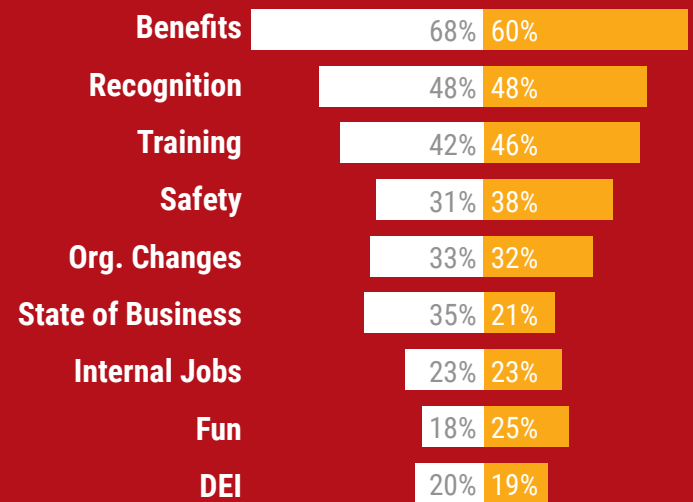
■ Non-Manager



Topics of Interest Based on Gender

■ Male

■ Female



Results: Topics

CONTINUED

Top Topics by Industry

All industries have the same top three topics: benefits, recognition, and training. And the least important topics were also consistent across industries: DEI, Just for Fun, and Internal Job Postings.

	Topics of Interest			
	Hospitality	Healthcare	Manufacturing	Logistics
Benefits	62%	65%	67%	56%
Recognition	45%	56%	48%	39%
Training	45%	47%	45%	33%
Safety	36%	38%	30%	33%
Org. Changes	29%	37%	34%	26%
State of Bus.	23%	23%	32%	34%
Job Postings	22%	21%	27%	20%
Just for Fun	23%	26%	20%	14%
DEI	20%	18%	22%	16%

Top Topics by Age

The only major trend by age is that younger employees were increasingly more concerned with DEI.

	Topics of Interest				
	> 54	45 - 54	35 - 44	25 - 34	18 - 24
Benefits	60%	51%	66%	67%	69%
Recognition	53%	46%	48%	53%	39%
Training	44%	43%	48%	42%	44%
Safety	36%	29%	35%	38%	33%
Org. Changes	42%	27%	37%	32%	25%
State of Bus.	27%	33%	29%	25%	19%
Job Postings	31%	22%	23%	22%	22%
Just for Fun	20%	17%	23%	24%	24%
DEI	7%	17%	18%	23%	25%

Results: BYOD

CONTINUED

Willingness to Use Personal Phone/Device for Company Comms

Vast Majority of Frontline Workers Are Willing to Use Personal Devices for Work

More than 4 in 5 employees say they would use their personal phone for communication. This makes adopting channels like texting and mobile apps more accessible to organizations.

82%

of frontline employees say they are willing to use their personal phone for work communication.



Top Arguments for and Against BYOD

Employees who were in support of bringing their own device cite ease, convenience, and a general lack of concern about it. Those who were opposed were mainly concerned about the personal cost to them.

Top Reasons Supporting BYOD

- 44% Convenience
- 11% Generally Indifferent
- 9% For Comms/Better Access
- 8% Don't Want Second Device
- 6% Already Use Phone for Work

Top Reasons Against BYOD

- 45% Want Work/Life Separation
- 21% Employer Should Cover Cost
- 20% Personal Privacy Concerns
- 8% Employer Should Provide Phone
- 3% Not Secure for Company

Results: Outlook

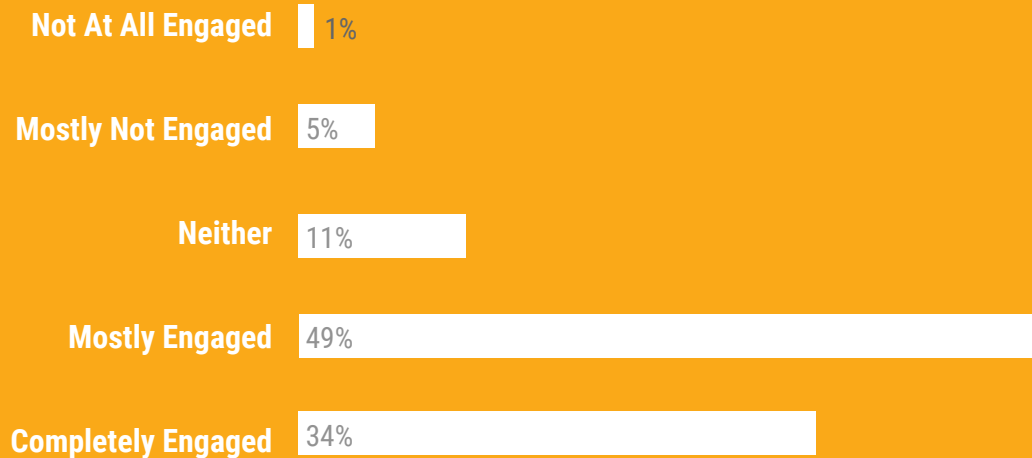
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Engagement, Trust & Retention

Employees Report Being Engaged at Work

We defined engagement for our survey respondents as being “committed to one’s job and motivated.” Despite, Gallup’s gloomy outlook on engagement, the average frontline worker reported being mostly or completely engaged. These numbers are fairly consistent with what we saw in 2021.

Would You Consider Yourself Engaged At Work?



Engagement Dictated by Role

86% of managers said they were either mostly or completely engaged at work compared with 78% of non-managers.

Interestingly, the same amount of managers and non-managers are “Mostly Engaged” with the far more non-managers feeling neutral and less reporting being “Completely Engaged” than their managerial counterparts.

	Manager	Non-Manager
Not At All Engaged	1%	2%
Mostly Not Engaged	5%	6%
Neither	9%	14%
Mostly Engaged	49%	49%
Completely Engaged	37%	29%

Results: Outlook

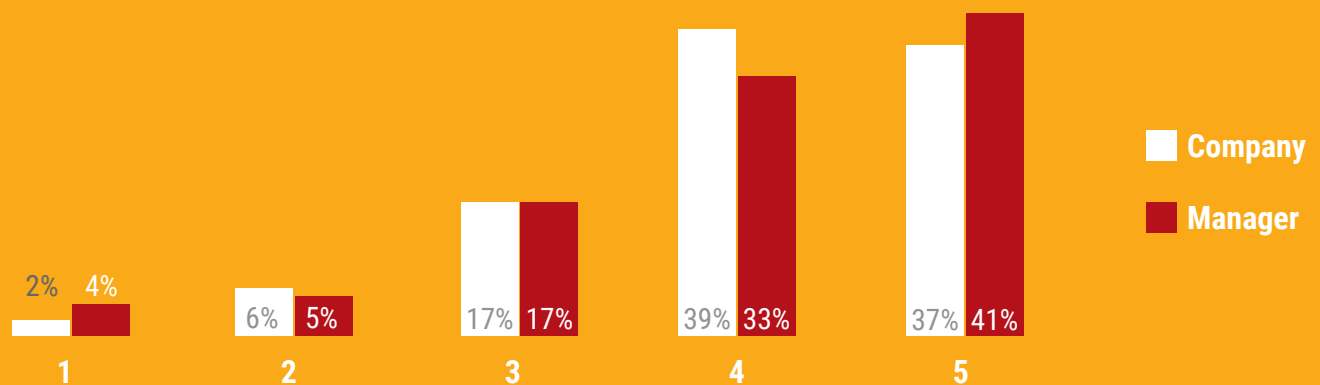
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Engagement, Trust & Retention

Employees Mostly Trust Both Their Company and Direct Manager

Like we saw in 2021, employees mostly trust who they work for. On a positive note for businesses, these scores actually went up slightly this year. In 2021, 69% of employees said they trusted their company and 69% trusted their manager (a score of 4 or 5). In 2022, those numbers rose to 76% and 74%, respectively.

How Much Do You Trust Your Company & Manager? (1 = Not at All, 5 = Completely)



Trust Across Industries

- Hospitality (4 or 5): **79% trust organization**, 73% trust manager
- Healthcare (4 or 5): 73% trust organization, 73% trust manager
- Manufacturing (4 or 5): 73% trust organization, 73% trust manager
- Logistics (4 or 5): 77% trust organization, **80% trust manager**

Trust in Organization by Industry

	1	2	3	4	5
Hospitality	2%	6%	14%	37%	42%
Healthcare	3%	6%	19%	39%	34%
Manufacturing	3%	6%	18%	36%	37%
Logistics	2%	4%	17%	46%	31%

Trust in Manager by Industry

	1	2	3	4	5
Hospitality	4%	5%	19%	28%	45%
Healthcare	5%	4%	18%	35%	38%
Manufacturing	3%	6%	18%	34%	39%
Logistics	2%	4%	15%	35%	45%

Results: Outlook

CONTINUED

Engagement, Trust & Retention

Retention Outlook is Good

Perhaps a sign that the worst of the Great Resignation is behind us, self-reported retention is very high, with the majority of employees (83%) planning to stay at their company for at least one year and many of those saying they want to stay more than three years (55%).

How Long Do You Plan to Stay at Your Current Organization?



Retention Across Industries & Roles

There are not huge discrepancies across industries. However, hospitality and logistics, which typically see high turnover, have the least percentage of employees planning to stay more than three years.

Managers are more likely to report they will stay 1+ years (85%) compared with non-managers (78%).

Retention Intent by Industry

	Hosp.	Health.	Mfg.	Logistics
< 6 Months	6%	5%	4%	3%
6 months - 1 year	14%	12%	13%	13%
1 - 3 years	29%	27%	23%	33%
3+ years	51%	56%	61%	50%

Retention Intent by Role

	Managers	Non-Managers
< 6 Months	4%	6%
6 months - 1 year	11%	16%
1 - 3 years	27%	28%
3+ years	58%	50%

Results: Improvements

CONTINUED

What Could Be Improved About Company Communications

We asked our survey participants to write in the one thing that they thought could be improved about communication from their employer—either from corporate or from their direct manager.

Answer	%
Nothing (or Unsure)	33%
More Communication	22%
Improve Quality	12%
More Respect	8%
Less Communication	6%
More Timely	6%
More Transparency	3%
Improve Channels	2%
More Recognition	2%
Improve When Comms Are Sent	1%

Trends Over Time

- In 2021, 27% were not sure what could be improved or believed **nothing needed to be changed**. This was a more common answer in 2022, marking a positive improvement.
- In 2021, 14% wanted to receive **more communication**. This jumped to 22% this year.
- In 2021, 2% wanted to be communicated to **more respectfully**. This jumped to 8% this year and was largely from non-managers wanting managers to be more respectful.



Key Takeaways

Our 2022 findings show that there is a lot that internal communication professionals should be proud of. Satisfaction, engagement, and retention data are all overwhelmingly positive. But our survey has found that there are areas where we should focus to improve the employee experience for both our managers and non-managers.

Differences Between Managers & Non-Managers

Like in 2021, the most notable trend in the data is the large discrepancy between the manager and non-manager's experience. This is highlighted by the difference in satisfaction with the amount of communication they receive:

16% more managers are satisfied or extremely satisfied with the amount of communications they receive than non-managers.

Across the board, managers have more access to channels. More access to communication likely means these managers feel more informed and more equipped to do their jobs. And satisfaction with communication seems correlated with managers also having higher engagement, retention, and trust.

What does this mean?

1. You need more direct channels of communication for frontline workers who aren't managers.
2. You need to focus on manager communication to ensure they are relaying messages properly and having better one-on-one conversations with their direct reports. Face-to-face communication is still king, but you have to coach your managers on how to be good communicators.



Key Takeaways

CONTINUED

Differences Between Men & Women

Men and women tended to not be very divided on the topics we covered in the survey. However, there were slight differences in their preferred topics.

25% of women want “Just For Fun” content vs. 18% of men

38% of women want “Safety” content vs. 31% of men

21% of women want “State of the Business” content vs. 35% of men

Although the gaps in topic preferences are not very wide, they do indicate that there are different values and priorities being placed on content based on audience demographics.

What does this mean?

1. You may need to create personas to better target communication.
2. You need to consider audience preferences more when creating your content strategy. Don't assume all your employees feel the same way about everything.

Differences Between Age Groups

Trends have begun to emerge between different age groups in the workplace. Although, for the most part, age did not dictate what topics and channels employees preferred, there were a few exceptions:

Younger employees prefer mobile channels. 60% said they want text; the average was 51%. 27% want an employee app; the average was 19%.

Younger employees are more concerned with diversity, equity, and inclusion. 23 percent of 25 - 34 year olds and 25 percent of 18 - 24 year olds say they care about DEI; the average was 20% and only 7% those older than 54 said they care about this topic.

What does this mean?

1. The generational divide is coming to the workplace. We need to start preparing to embrace the needs of *all* generations represented in the workforce.
2. Each age category had more in common than you might expect. Avoid making assumptions about employee needs based on generation.

Key Takeaways

CONTINUED

A Shift Towards Mobile Channels

Mobile channels made the most headway in 2022 compared to our 2021 results.

What does this mean?

1. More companies are embracing new channels to reach dispersed workforces.
2. Employees have more options than ever before, helping with satisfaction and engagement year over year.

Access to Texting:

- » 2021: 44%
- » 2022: 57%

Access to Employee Apps:

- » 2021: 16%
- » 2022: 25%

Differences Between Industries

For the most part, an employees' industry did not impact their interests, channels, and levels of satisfaction by a large margin. But there were some key differences in channel access and trust:

Logistics & Hospitality employees had more access to **mobile first channels (texting/apps)** than they had access to email and Intranets.

Logistics employees notably had the **highest trust in their direct manager (80%)** than any other industry we tracked (73%).

What does this mean?

1. Industries with deskless employees need to invest in tools that meet employees where they are.
2. We need to continuously re-evaluate our channels for communication and targeting to reach people when it matters to maintain trust and high levels of engagement/satisfaction.



Key Takeaways

CONTINUED

Making Sense of the Open-Ended Responses: What's Broken In Internal Comms?

We received a lot of great responses to the open-ended question on the survey: what do you think could be improved about communication from your employer?

The big takeaways here are that there is a growing divide between managers and non-managers. Non-managers were giving the feedback that they needed to receive **more communication** (or ANY communication) and many more than in 2021 stressed the need for that communication to be **more respectful**.

More employees than in 2021 said they wished the quality of the communication they received could be improved. This included a wide range of specific improvements such as:

- Clarity
- Concision
- More Detail
- More Relevant/Targeted
- More Positive
- More Consistent
- More Direct
- Less Fluff

The feedback regarding communication channels was very mixed. For every person who expressed love for a channel, someone else expressed their disdain. This just proves that you cannot please everyone with a single channel, so having a diverse channel mix is a good strategy. Channel feedback ranged from:

- Fewer/More Channels
- More Digital Channels
- Less/More Email
- Less/More Text
- Less Peer-to-Peer Chat
- Less Printed Communications
- Less/More Employee App
- More/Less Phone Calls

We recommend conducting a survey internally where you ask your employees about their communication preferences and what they think could be improved with communication at your company. And then filter your responses as much as you can to learn what divisions/locations are struggling more with one issue than another.

Key Takeaways

CONTINUED

The Future of Bring Your Own Device (BYOD)

[Bring Your Own Device \(BYOD\)](#) is a policy that states employees can use their own personal devices (phones, computers, tablets, etc.) for work.

Although increasing in popularity as a way for workers to access communication and resources to do their jobs, BYOD has faced some push-back over the years. But the results of this year's survey are indicative that it's time for BYOD policies to be embraced.

Myth: Employees won't want to use their personal device.

Survey Says: 82% of frontline workers are willing to use their personal phone for work communication.

Myth: Apps on personal phones encroach too much into employee privacy.

Survey Says: This misconception is a widely held one. 20% of respondents who said they weren't willing to BYOD gave privacy as the reason. That said, apps like theEMPLOYEEapp collect very little user data and mobile device preferences. And we even have the option for employers to turn off user data in their analytics dashboard.

Myth: Employees will expect to be compensated for time spent on their personal phones.

Survey Says: While 21% said they wouldn't BYOD because they would want the cost to be covered by their employer, 44% said they would be willing because it was more convenient.

Myth: Allowing employees to use their phones at work would be too distracting.

Survey Says: BYOD does not mean that all workplace rules go out the window. If your company has a "no phones on the floor" policy, that stands. BYOD only means they can access systems at appropriate times using their own devices.

Myth: Older employees won't want to BYOD and might not even own a smartphone.

Survey Says: PEW Research has found that 97% of adults in the US own smartphones. And even 72% of respondents older than 54 said they would be willing to use their personal devices.



Next Steps

Based on these survey results, we recommend that you do three things: implement an employee survey of your own, focus your attention on your managers, and conduct a channel audit.

Conduct Your Own Survey

It's always a good idea to use employee surveys and focus groups regularly to keep a finger on the pulse of what's going on at your organization.

Are you a company where employees say "this is the best communication I've ever received" or are you a company where employees are highly dissatisfied with communication and feel disrespected? The only way to find out where you stand is to conduct a survey like this one and compare how you did to our benchmarks. And keep in mind that even if the results come back with the majority being satisfied with current communication, that doesn't mean there isn't still progress to be made. Even though the vast majority of our survey population were at least satisfied, we had a ton of very thoughtful write-ins for what could still be improved.

If you're brand new to surveying, we've got you covered. Download this free [guide to Implementing employee surveys](#), which includes all the steps to write, implement, and then report on your survey.

Next Steps

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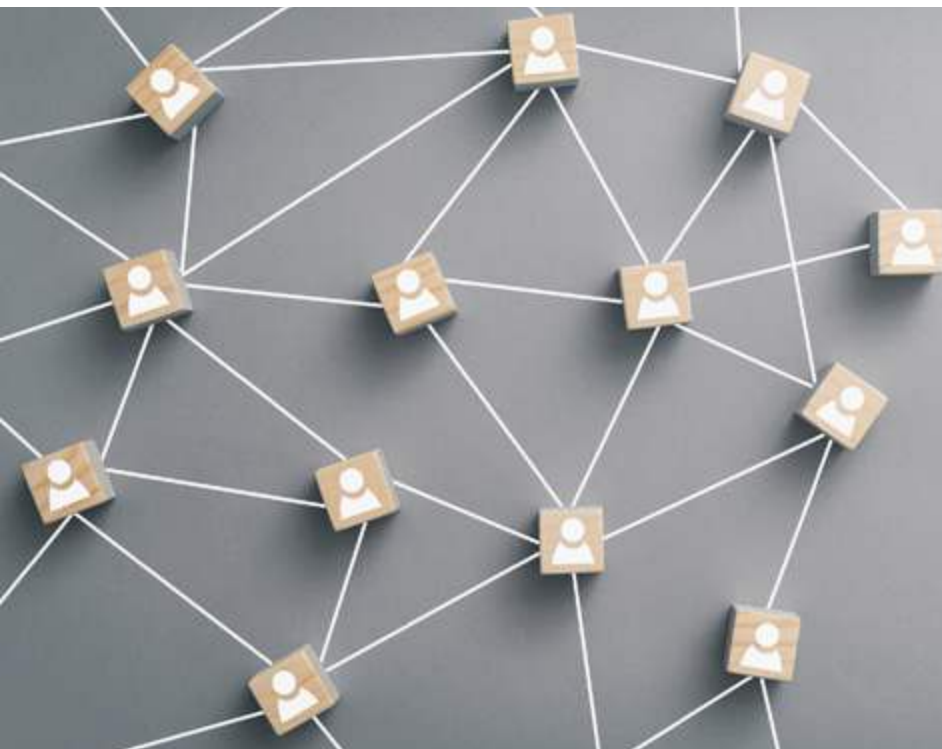
Focus On Your Managers

Redefining Communications, SocialOptic, and Gallagher’s “Line of Sight” report focuses on the role of line managers in organizations, specifically as it pertains to their role as communicators. And their research has also pointed to a very important truth: we need to better support our line managers. They aren’t necessarily trained leaders or communicators, but a huge weight of responsibility is put on them to convey key messages to their direct reports, to help with professional development of their teams, and to deliver business results.

And this lines up with what we see in our survey. Managers are receiving more comms and are more satisfied than the frontline teams they lead. So, we need to focus on them more. Whether this is giving them more talking points for their teams or investing in more training and development for their leadership and communication skills.

Audit Your Channels—Can You Reach Everyone Directly?

A channel audit is always a good idea. We recommend doing these annually and certainly when you start a new internal communication job. An internal comms audit helps you get an idea of how you’re currently sharing messages, what those messages are, and what audiences are receiving which messages and how. Even if you think you’ve got a handle on this, things change regularly. New channels emerge, new messages need to be sent, and employee preferences change. So conduct an audit each year to stay on top of the state of IC at your organization. Download our free [guide to completing an internal comms audit](#) to get started.



About theEMPLOYEEapp

theEMPLOYEEapp was created by communications and HR professionals to address the challenges organizations face communicating with a dispersed and deskless workforce. theEMPLOYEEapp is an internal communication and engagement solution that allows workers to have fast and easy access to the information, documents, and resources they need to succeed in their work.

Our app allows you to target information to your employees when and where they need it on their smartphone, tablet, or computer, and empower leaders and frontline managers to engage and activate employees across the organization. Unlike most traditional communications channels, theEMPLOYEEapp creates a customized, branded experience for employees, encouraging your workforce to join together in a single, centralized channel.

Our Mission is to enable the effortless flow of meaningful information for organizations driven by frontline workers.

[Request a Demo](#)

