



Shift Pulse Report

Insights from the global people platform
for hourly work



Introduction

Real-time visibility into how your people are feeling isn't a nice-to-have — it's a competitive advantage. Shift-based businesses run on energy, morale, and team cohesion. When those things break down, productivity drops, absenteeism rises, and culture suffers. That's why tools like Deputy Shift Pulse matter. They give leaders a clear picture of what's working — and what isn't — from the frontline up.

This year's Shift Pulse Report is based on over 1.51 million end-of-shift surveys, submitted anonymously by shift workers between April 2024 and April 2025 — a 260% increase from the 421,000 responses analyzed last year. This growth reflects not just wider adoption of Shift Pulse but the growing appetite from businesses to understand how sentiment links to performance, productivity, and profitability.

The insights from this year's U.S. data tell two stories.

The first is one of strength. Across the country, 78.48% of shift workers report feeling positive about their jobs — a powerful testament to the resilience and optimism of this workforce. States like South Carolina, Virginia, and Utah are leading the way, with net happiness scores well above the national average. These regions are showing that when workers feel supported through better scheduling, workplace culture, or local policy, businesses thrive.

But the second story is one of imbalance. In North Dakota, New Mexico, and Vermont, we see sharp declines in workplace sentiment. In some states, the net happiness score is more than 30 percentage points below the national average. These are not small variations. Whether it's due to economic pressure, understaffing, lack of flexibility, or simply not being heard, the message is clear: many shift workers are running on empty.

Why does this matter? Because sentiment is a leading indicator. It predicts churn, burnout, absenteeism, and performance. And in a tight labor market, understanding and acting on how people feel at work is crucial.

Deputy powers more than 380,000 workplaces and 1.5 million shift workers globally. The data in this report represents the lived experiences of people working in every corner of the country — not through abstract models, but through simple feedback given at the end of a shift.

It's our hope that this report not only informs but inspires action. Because if we want to solve the talent crisis and build workplaces that people want to stay in, we have to start by listening. **Not just once a year. But every day.**



Silvija Martincevic

CEO, Deputy

Methodology

The 2025 Shift Pulse Report is based on an analysis of **1,515,790 Shift Pulse survey responses** submitted by shift workers across the United States between April 2024 and April 2025.

What is Shift Pulse?

Shift Pulse is Deputy's one-tap in-app feedback tool that allows shift workers to anonymously record how they feel at the end of every shift. Workers choose from five response options:



1 - Stressed



2 - Frustrated



3 - Okay



4 - Good



5 - Amazing

These daily micro-interactions offer real-time visibility into **worker sentiment** across thousands of workplaces, enabling powerful data-led insights at scale.

Sentiment Analysis Approach

All analysis in this report categorizes shift worker sentiment into three groups:

Happy % of workers selecting “Good” or “Amazing”

Unhappy % of workers selecting “Stressed” or “Frustrated”

Neutral % selecting “Okay” (included in full data tables, excluded from rankings)

Each sentiment value is calculated as a proportion of total Shift Pulse responses within a defined cohort, such as an industry sector, parent industry, state, or national group, and expressed as a percentage rounded to two decimal places. This methodology allows for consistent comparison across industry level (e.g. Retail, Healthcare), sub-sector level (e.g. Call Centers, Cafes), and geographic level (e.g. States).

Introducing the Net Happiness Score

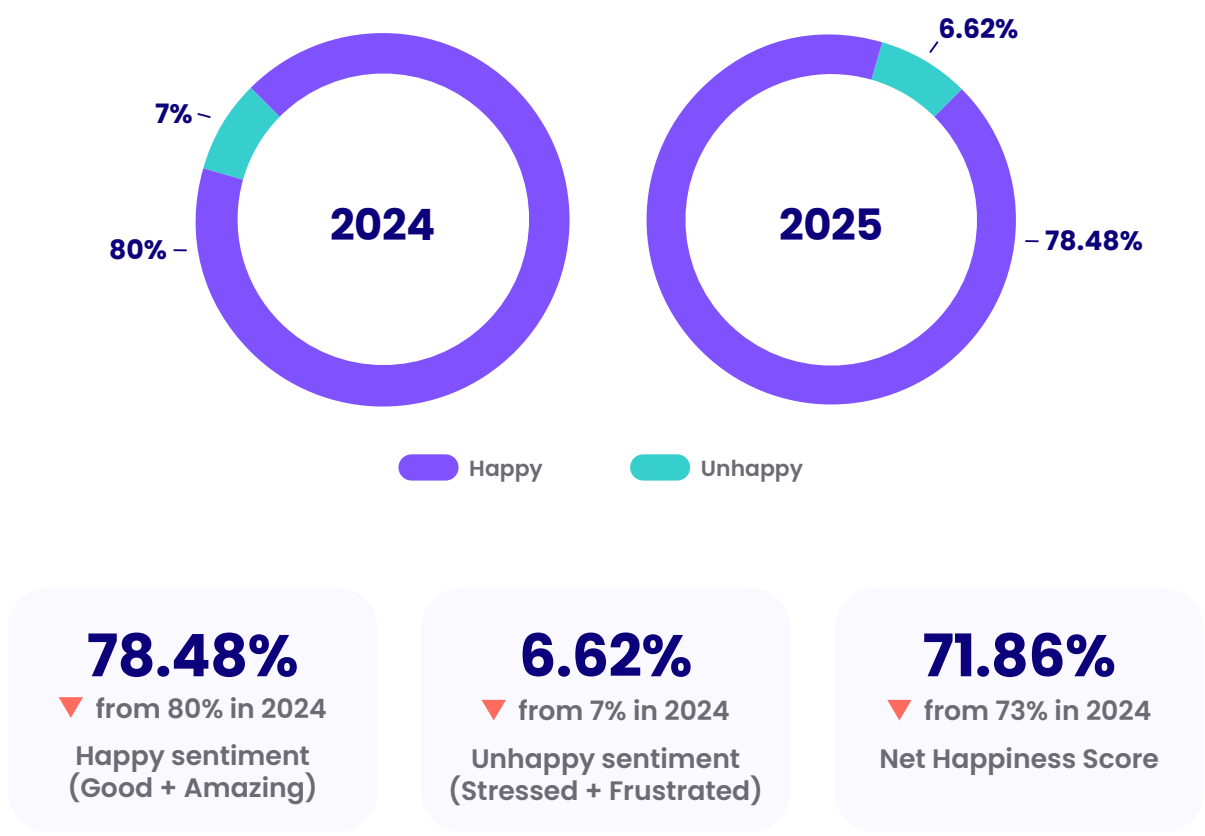
The Net Happiness Score, a single metric summarizing overall emotional well-being in a given industry or group, is new to the 2025 edition of the Shift Pulse Report.

It is calculated using the following formula:

$$\text{Net Happiness Score} = (\% \text{ Good} + \% \text{ Amazing}) - (\% \text{ Stressed} + \% \text{ Frustrated})$$

This provides a clear, comparative measure of emotional net positivity, helping identify not just where shift workers are happiest but also where positive sentiment meaningfully outweighs negative sentiment. It is especially useful when comparing performance across sectors or tracking sentiment over time.

U.S. Shift Workers Becoming Less Happy



Happiness among U.S. shift workers has declined over the past year, signaling a subtle but important shift in workforce sentiment. In 2025, 78.48% of responses reflected positive sentiment (classified as Good or Amazing) down from 80% in 2024. While still a strong majority, this drop indicates a slow erosion of overall morale.

Interestingly, negative sentiment has also decreased slightly, with 6.62% of shift workers reporting feeling Stressed or Frustrated, down from 7% the previous year. This suggests that while fewer workers feel extremely negative, many may be slipping into a more neutral or disengaged emotional state, a potential early warning sign for burnout, turnover, or productivity dips.

The Net Happiness Score — a key leading indicator of workforce wellbeing — fell to 71.86%, down from 73% in 2024. This year-on-year decline, though not drastic, should prompt employers and policymakers to reassess how well the needs of America’s shift-based workforce are being met, especially in the face of persistent economic pressures, ongoing poly-employment trends, and the growing demand for scheduling flexibility and financial predictability.

Happiest Shift Workers are in Retail; Healthcare Ranks Lowest



In 2025, the Retail and Hospitality sectors lead the way in shift worker happiness across the United States, while Healthcare continues to struggle with workforce sentiment.

Retail shift workers reported the highest levels of positive sentiment, with a Happy score of 81.88% and the highest Net Happiness score at 75.63%. Despite the well-documented challenges of retail – such as long hours and customer-facing stress – this result suggests that improvements in flexibility, wage transparency, and shift consistency may be helping employers in this sector boost morale.

Hospitality follows closely behind, with 81.46% of workers feeling positive and a Net Happiness score of 75.41%. The competitive labor market and increased focus on retention in hotels, restaurants, and entertainment venues may be contributing to stronger engagement from frontline teams.

Meanwhile, Healthcare ranks lowest across all parent industries, with only 73.56% of workers reporting positive sentiment and the highest Unhappy score at 8.25%. The Net Happiness score of 65.31% — a full ten points below Retail — reflects the ongoing strain on healthcare workers, who continue to shoulder high emotional and physical workloads in a post-pandemic environment marked by staffing shortages, unpredictable hours, and regulatory pressure.

These findings underscore the urgent need for targeted wellbeing initiatives and smarter scheduling practices in the healthcare industry, while also highlighting how sectors like Retail and Hospitality may offer transferable strategies for improving workplace satisfaction at scale.

Top 10 Happiest Industry Sectors (2025)



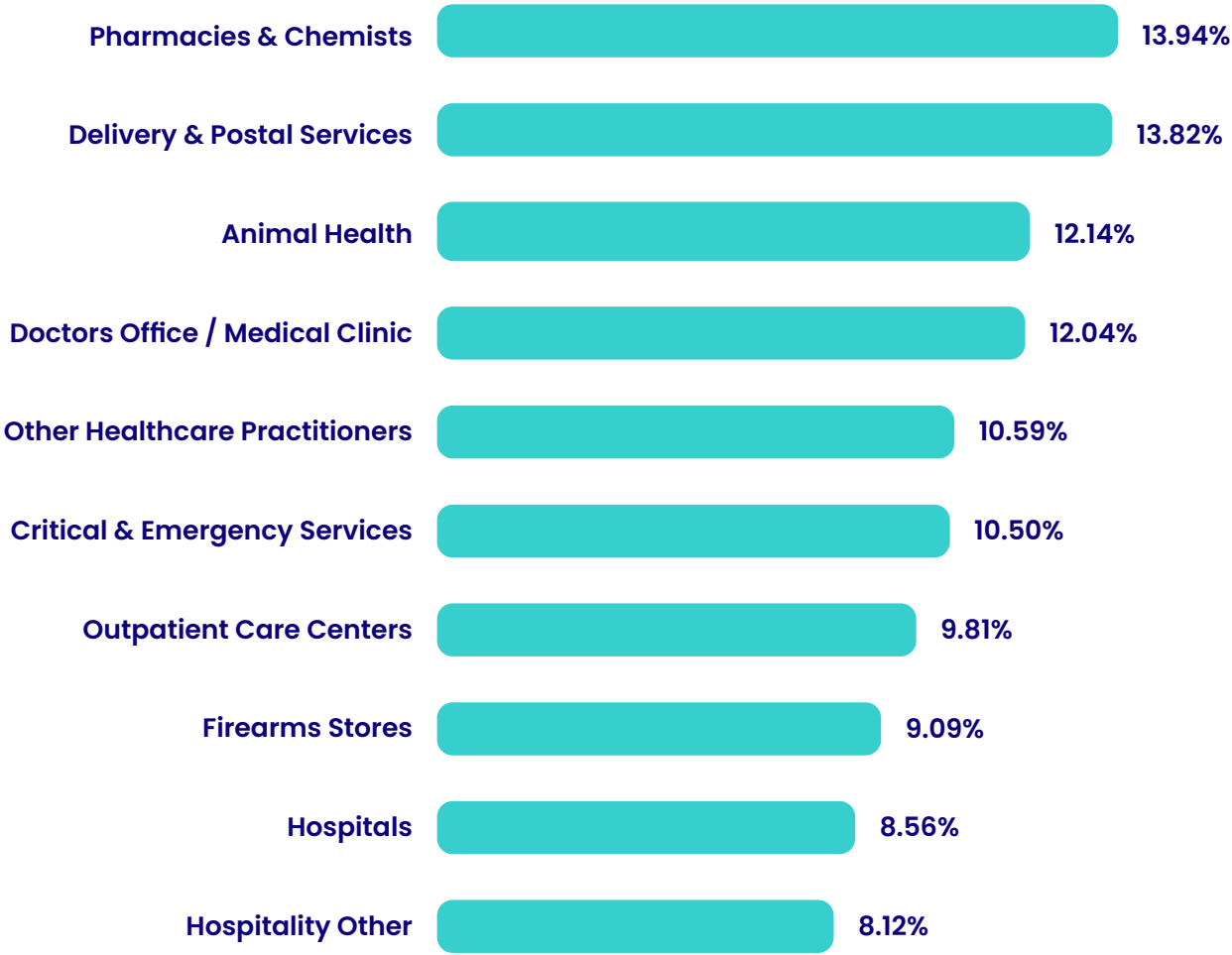
Unlikely sectors rise to the top as shift worker sentiment shines in retail, food, and personal services

This year's data reveals an unexpected but compelling story: some of the highest happiness scores in the U.S. shift workforce are emerging from industries often overlooked in conversations about workplace wellbeing.

- Topping the list is the Tobacco, E-cigarette & Marijuana sector, with a remarkable 91.87% of shift workers reporting positive sentiment. This may reflect stronger workplace culture and wage competitiveness in newer, regulated industries that prioritize employee retention as they scale rapidly.
- Catering (90.90%) and Cafes / Coffee Shops (89.73%) round out the top three, suggesting that fast-paced food and beverage environments, when managed well, can foster a sense of camaraderie, flexibility, and purpose among staff.
- Sectors such as Dentists (89.53%), Gyms (89.28%), and Childcare / Community Centers (83.18%) also appear in the top 10, highlighting that workers in caregiving and health-adjacent roles report high satisfaction when they feel connected to the people they serve and supported by their teams.
- Firearms Stores (87.27%) also make the list, signaling that high happiness scores can occur in highly specialized or niche retail environments where team structures are tight-knit and job expectations are clear.

This year's happiest industry sectors reveal a growing trend: purpose, predictability, and a sense of control over one's workday matter just as much — if not more — than prestige or pay alone. For employers looking to improve sentiment, these industries offer practical lessons in team cohesion, autonomy, and culture-building.

Top 10 Unhappiest Industry Sectors (2025)



Healthcare dominates the bottom of the sentiment scale as critical industries signal rising fatigue

The 2025 Shift Pulse data paints a concerning picture for several key sectors — particularly those that form the backbone of care, delivery, and frontline public services. The highest levels of negative sentiment this year were concentrated in industries where emotional labor, physical stress, and burnout are increasingly difficult to avoid.

- Pharmacies & Chemists reported the highest proportion of unhappy shift workers at 13.94%, followed closely by Delivery & Postal Services (13.82%), where pressure from peak demand, rigid timeframes, and customer-facing tension may be contributing to workplace dissatisfaction.

The trend continues across the broader healthcare ecosystem:

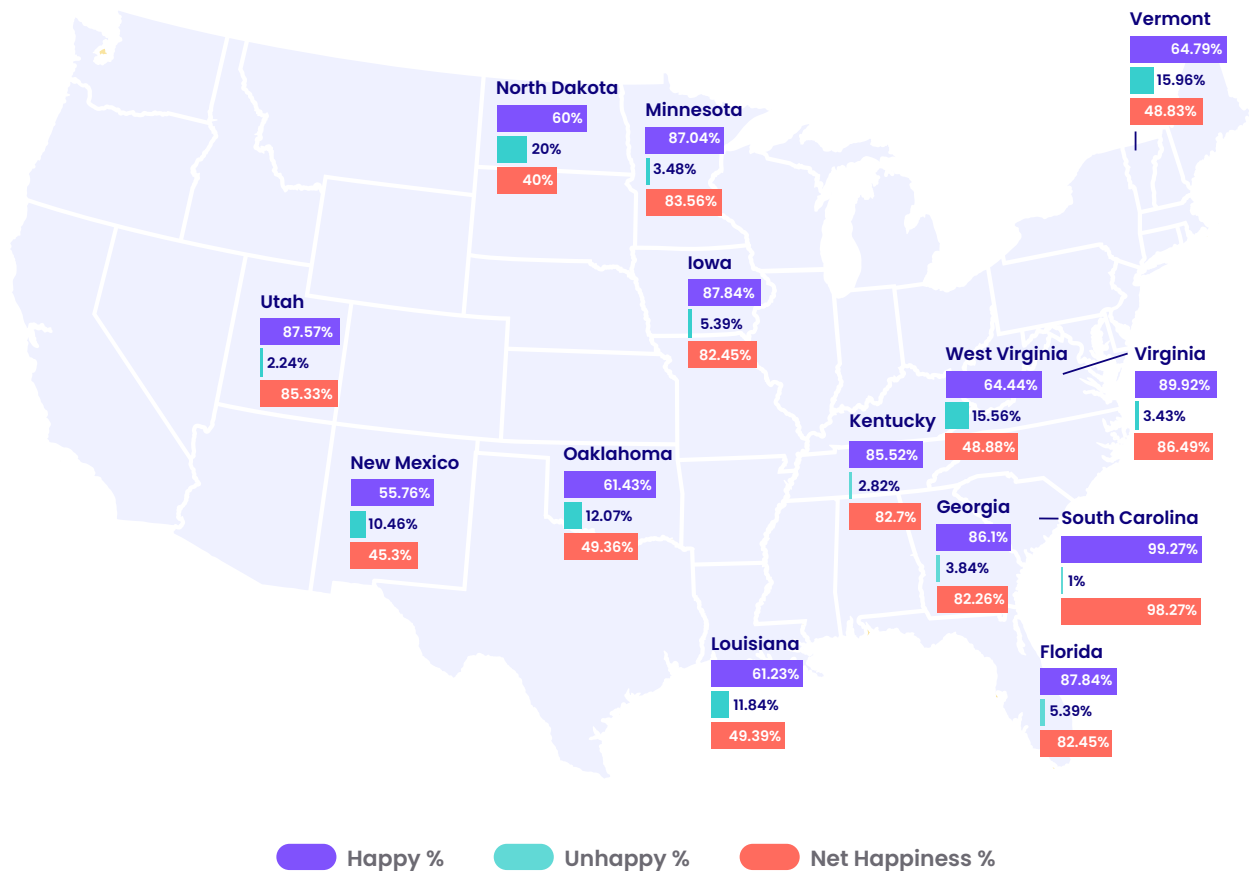
- Animal Health (12.14%)
- Doctors' Offices / Medical Clinics (12.04%)
- Other Healthcare Practitioners (10.59%)
- Outpatient Care Centers (9.81%)
- Hospitals (8.56%)

Together, these roles account for seven of the ten most unhappy sectors. This level of dissatisfaction highlights an urgent need for deeper systemic support — from more sustainable staffing levels and compensation structures to smarter rostering practices and mental health support.

- Critical & Emergency Services (10.50%) also make the list, a stark reminder that even those trained to work under extreme conditions are feeling the strain in a post-pandemic era where demands remain high but resources haven't kept pace.
- Lastly, Hospitality (8.12%) and Firearms Stores (9.09%) appear in the top 10, reflecting rising worker frustration in roles with increasing pressure and low tolerance for error.

Across all sectors, the data suggests a tipping point: where predictability, support, and control are lacking, negative sentiment takes hold. Businesses operating in these high-pressure industries may need to rethink shift structure, support systems, and recognition frameworks to retain talent and protect well-being.

U.S. State-by-State Sentiment: A Nation of Contrasts



The 2025 Shift Pulse Report reveals sharp divides across the U.S. in how shift workers feel about their jobs — with sentiment driven not just by geography, but also by local economic conditions, industry makeup, and cultural attitudes toward work.

- South Carolina stands out with an extraordinary Net Happiness Score of 98.27%, driven by near-zero reports of negative sentiment. Southern states like Kentucky, Florida, and Georgia perform particularly well, suggesting a cultural emphasis on hospitality, flexibility, and local job satisfaction.
- Midwestern states like Minnesota and Iowa also rank highly — perhaps benefiting from more predictable schedules, community-driven workplaces, and lower cost-of-living pressures compared to coastal economies.
- Notably, Virginia and Utah, both home to growing tech and healthcare sectors, rank in the top three, indicating that innovation and operational excellence may be delivering better day-to-day experiences for shift-based employees.

The 2025 Shift Pulse Report reveals sharp divides across the U.S. in how shift workers feel about their jobs — with sentiment driven not just by geography, but also by local economic conditions, industry makeup, and cultural attitudes toward work.

- At the other end of the spectrum, states like North Dakota, New Mexico, and Vermont report significantly lower Net Happiness Scores, some trailing the national average by over 20 percentage points.
- In North Dakota, one in five shift workers reported feeling unhappy — the highest negative sentiment in the country. This may reflect a mismatch between employment opportunities and job satisfaction in rural or resource-driven economies.
- Similarly, Vermont and West Virginia, while smaller in population, show disproportionately high levels of dissatisfaction. In many cases, these states are grappling with aging workforces, stagnant wages, or limited job mobility, all of which can dampen morale.
- Southern and midwestern states like Oklahoma, Louisiana, and Indiana also appear in the bottom 10, suggesting uneven experiences for frontline workers even within regions that otherwise score high.

While many shift workers across the U.S. report feeling positive and supported in their roles, the variation between states is too large to ignore. From nearly universal happiness in South Carolina to deep-rooted frustration in North Dakota, this year's data makes clear that policy, workplace culture, and economic equity all play a role in shaping how it feels to clock in.

For employers and policymakers, this is a call to action: where people live still heavily influences how they feel about the work they do — and no single national strategy will solve for sentiment without considering these local realities.

* **Deputy's Shift Pulse feature helps businesses easily capture continuous feedback from employees with a simple, one-step way for teams to share how they're feeling after every shift. With these valuable insights, managers can make changes to improve the team's effectiveness and create a thriving workplace.**

1,515,790 Shift Pulse Survey responses were analyzed for this report.

12:22

How did you feel during your shift today?

Don't worry, your response is anonymous

Amazing Good Okay Frustrated Stressed

Tell us why (optional)

Send feedback



**Improving the world of work,
one shift at a time.**



4.5/5 on Capterra



4.7/5 on GetApp



4.8/5 on the App Store



4.7/5 on Google Play