



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 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 1.28 million end-of-shift surveys, submitted anonymously by shift workers between April 2024 and April 2025 — a 341% increase from the 276,000 responses analysed 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, retention, and team wellbeing.

This year's UK insights offer a timely window into the state of shift worker sentiment, and the findings are both illuminating and urgent. While overall happiness remains relatively high, there are signs of growing divergence. Some counties, such as Warwickshire and Manchester, are leading the way in creating supportive, high-sentiment environments. Others — including the West Midlands, Buckinghamshire, and Ireland — are facing notable challenges, with alarmingly low Net Happiness Scores that demand attention.

The data also highlights sector-specific trends. Frontline workers in hospitality, retail, and childcare settings report high levels of satisfaction, often tied to operational clarity, team camaraderie, and predictable shift patterns. Conversely, healthcare-adjacent sectors and call centres show disproportionately high levels of worker frustration and stress — a reminder that even purpose-driven work can become unsustainable without the right structural support.

As the world of work continues to evolve, the voices of shift workers must remain central. Fair scheduling, flexibility, and workplace wellbeing are no longer nice-to-haves — they are business imperatives. We hope this report helps business leaders, policymakers, and advocates better understand where workers are thriving, where they're struggling, and what we can do — together — to build a better future for the 80% of the global workforce who work shifts.



Emma Seymour
CFO, Deputy

Methodology

The 2025 Shift Pulse Report is based on an analysis of **1,218,123 Shift Pulse survey responses** submitted by shift workers across the UK & Ireland 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

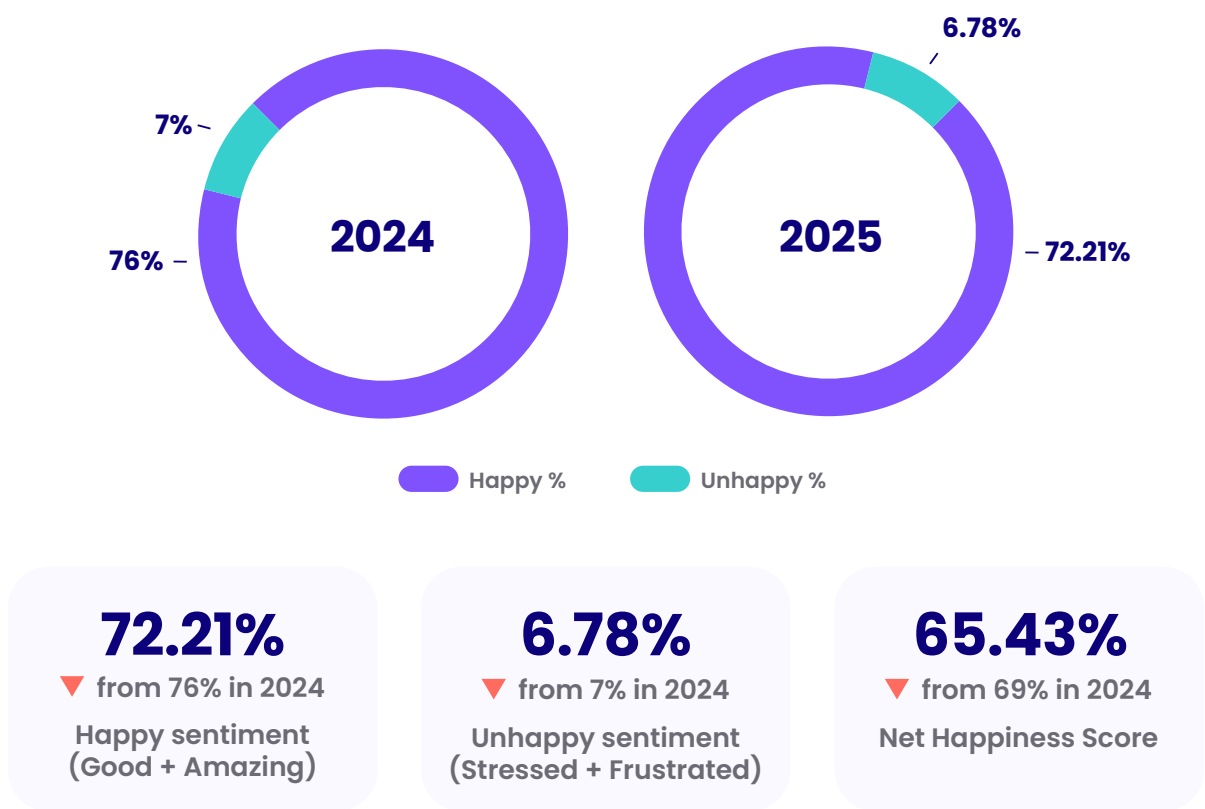
The Net Happiness Score, a single metric summarizing overall emotional well-being in a given industry or group, is new to the 2025 edition of the Shift Pulse Report.

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.

UK Shift Workers Mostly Happy, But Less Happy Than Last Year



The 2025 UK Shift Pulse data reveals a subtle but important shift in worker sentiment across the nation’s shift-based workforce. While most frontline employees continue to report positive experiences at work, year-on-year comparisons show a clear softening in overall sentiment.

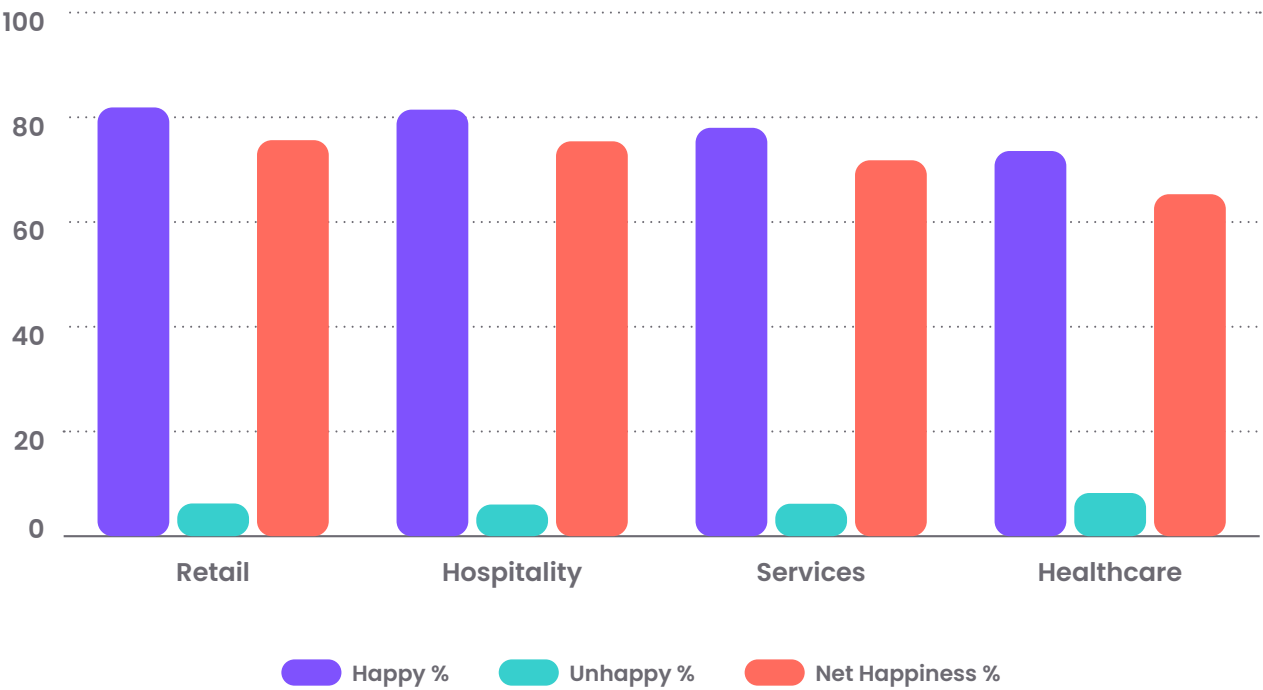
Happy sentiment — defined as workers reporting their shift as “Good” or “Amazing” — sits at 72.21%, down from 76.0% in 2024. This 3.79 percentage point drop may appear marginal at first glance, but at scale it represents thousands of shift workers feeling slightly less positive about their daily experience on the job.

On the other end of the spectrum, Unhappy sentiment — measured as those who report feeling “Stressed” or “Frustrated” — has declined modestly to 6.78% (from 7.0% last year). This suggests that while overall happiness has slipped, active dissatisfaction is not rising at the same pace. Instead, the data points to a broader flattening of positive sentiment, where fewer workers feel energized, motivated, or deeply satisfied at work, even if they’re not actively unhappy.

The result is a Net Happiness Score of 65.43%, down from 69.0% in 2024. This downward trend, seen across several sectors, may reflect the cumulative effects of cost-of-living pressures, labour shortages, scheduling volatility, and a perceived lack of career progression within shift-based roles.

In a tightening labour market, even small drops in net happiness carry significant consequences. Lower engagement impacts retention, customer experience, and operational resilience — especially in essential industries like healthcare, hospitality, and retail.

Happiest Shift Workers Are in Retail — Healthcare Ranks Lowest



UK's Happiest Shift Workers Found in Hospitality and Retail-Adjacent Sectors

The latest Shift Pulse data shows that Tobacco, E-cigarette & Vape Stores top the list for shift worker happiness in the UK in 2025, with a striking 93.42% Happy sentiment.

- These specialty retailers lead by a significant margin, followed by Sit Down Restaurants (89.73%) and Fast Food / Cashier Restaurants (82.88%), highlighting hospitality as a sector where employee satisfaction is notably strong.
- Florists (82.86%) and Food Pop-Ups (82.45%) also feature prominently, suggesting that less traditional or more flexible roles within these sectors may contribute to improved worker sentiment. The consistent appearance of food and beverage-related environments — including Cafes / Coffee Shops (81.97%) and Catering (75.25%) — further reinforces this trend.

Interestingly, Dentists (81.81%) and Childcare / Community Centres (78.40%) also appear in the top 10, representing sectors where shift workers report high satisfaction despite potentially demanding responsibilities.

Cleaning Services (64.28%) round out the list, indicating room for further improvement, but still performing better than many other sectors overall.

This data suggests that shift worker happiness in the UK is highest in roles that may offer routine, predictable work environments, clear customer-facing interactions, or consistent scheduling — such as food service, retail, and specialty stores.

Sectors like Sit Down Restaurants and Fast Food may benefit from strong team camaraderie and streamlined shift structures. Meanwhile, high sentiment in Tobacco & Vape Stores could reflect lower stress levels or less physical demand compared to other frontline roles. Notably, industries like Catering, Dentistry, and Childcare also feature in the top 10 — a mix that shows happiness is not confined to a single work type, but potentially linked to operational clarity, manageable workloads, and supportive team dynamics.

Retail Leads on Shift Worker Happiness — Healthcare Lags Behind Retail-Adjacent Sectors

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Retail workers are the happiest among all major sectors, with 81.88% reporting a positive experience on the job and a Net Happiness Score of 75.63%. Despite ongoing cost-of-living pressures and changing consumer habits, this score reflects progress many retail businesses have made in offering better scheduling, improved workplace culture, and greater transparency around hours and pay. It's a strong signal that investment in frontline wellbeing can deliver a measurable impact — even in sectors known for high turnover.

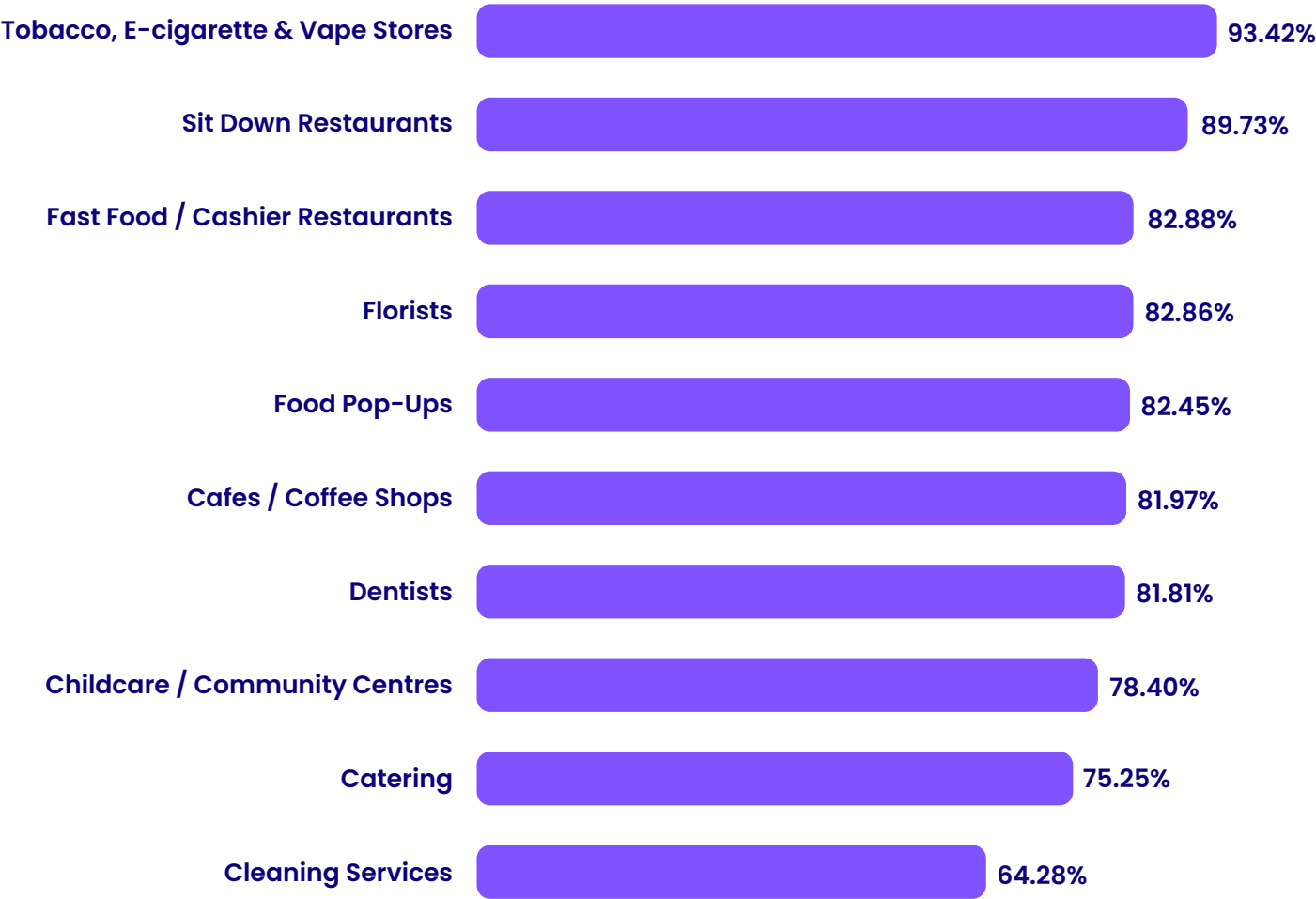
Close behind, Hospitality shift workers reported 81.46% happy sentiment, with the second-highest net happiness score at 75.41%. This stands out in a sector that's faced intense post-pandemic strain, staffing challenges, and rising customer expectations. The uplift in sentiment suggests that employers who have stabilised operations, introduced more predictable rosters, or enhanced team culture are seeing real results.

Services, including childcare, personal services, and cleaning, recorded a solid 77.99% happy sentiment, with a Net Happiness Score of 71.79%. While slightly lower than Retail and Hospitality, this group still ranks well above the national average, underlining the importance of meaningful work and consistent hours for shift-based employees.

In contrast, Healthcare workers reported the lowest happiness levels, with 73.56% happy sentiment and a significantly lower Net Happiness Score of 65.31% — more than 10 points below Retail. Healthcare also had the highest Unhappy sentiment rate (8.25%) among the four sectors. These figures reflect the ongoing pressures in the NHS and broader care sector: staffing shortages, emotional strain, unpredictable rosters, and an ageing population are all contributing to a more strained frontline workforce.

The sectoral differences offer a clear takeaway: workplace sentiment is highly responsive to local conditions, leadership practices, and operational realities. Employers that recognise this — and use tools like Shift Pulse to track sentiment in real time — will be better equipped to retain staff, boost morale, and stay resilient in the face of ongoing change.

Top 10 Happiest Industry Sectors (2025)



Happiest Shift Workers Found in Hospitality and Retail-Adjacent Sectors

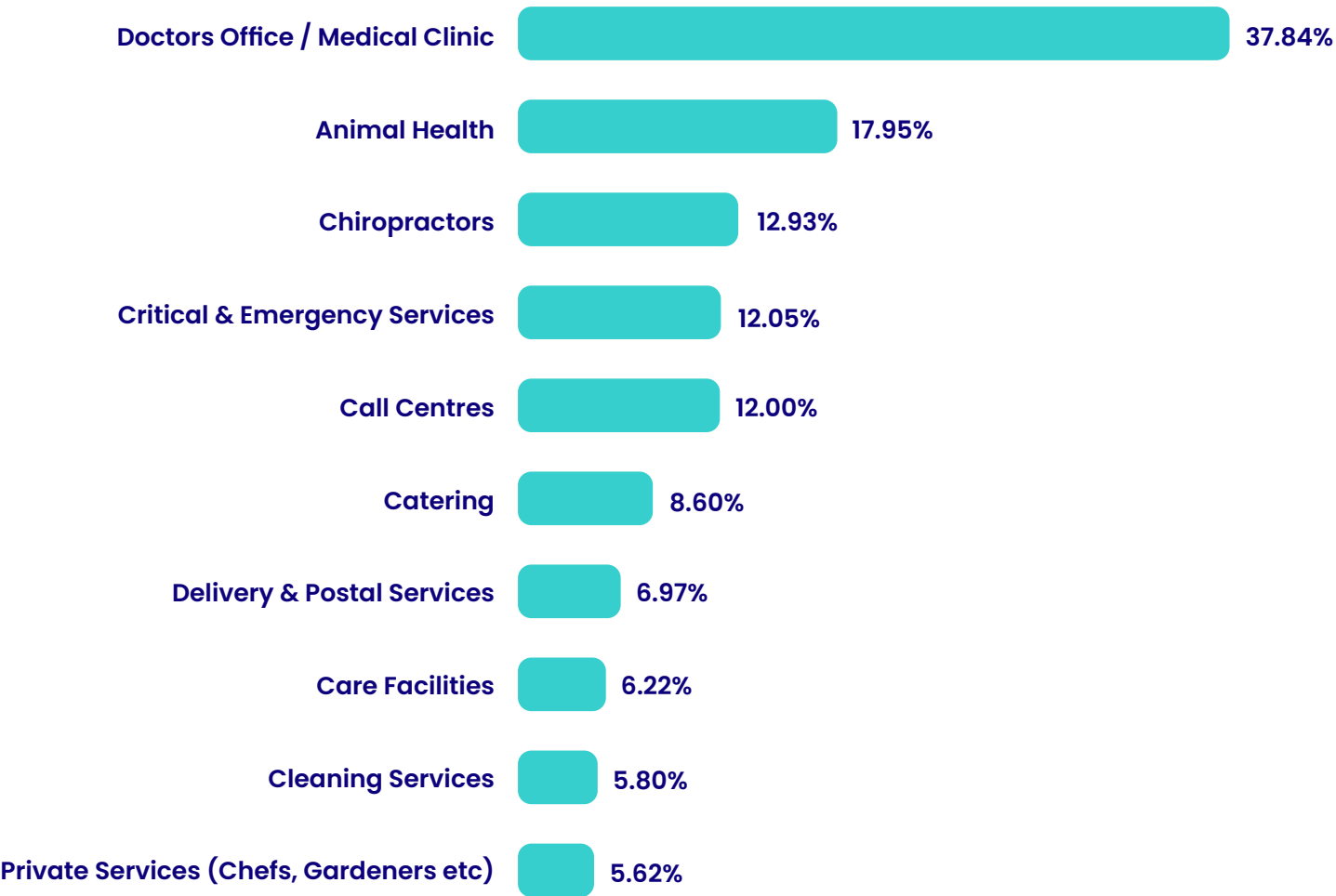
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Top 10 Unhappiest Industry Sectors (2025)



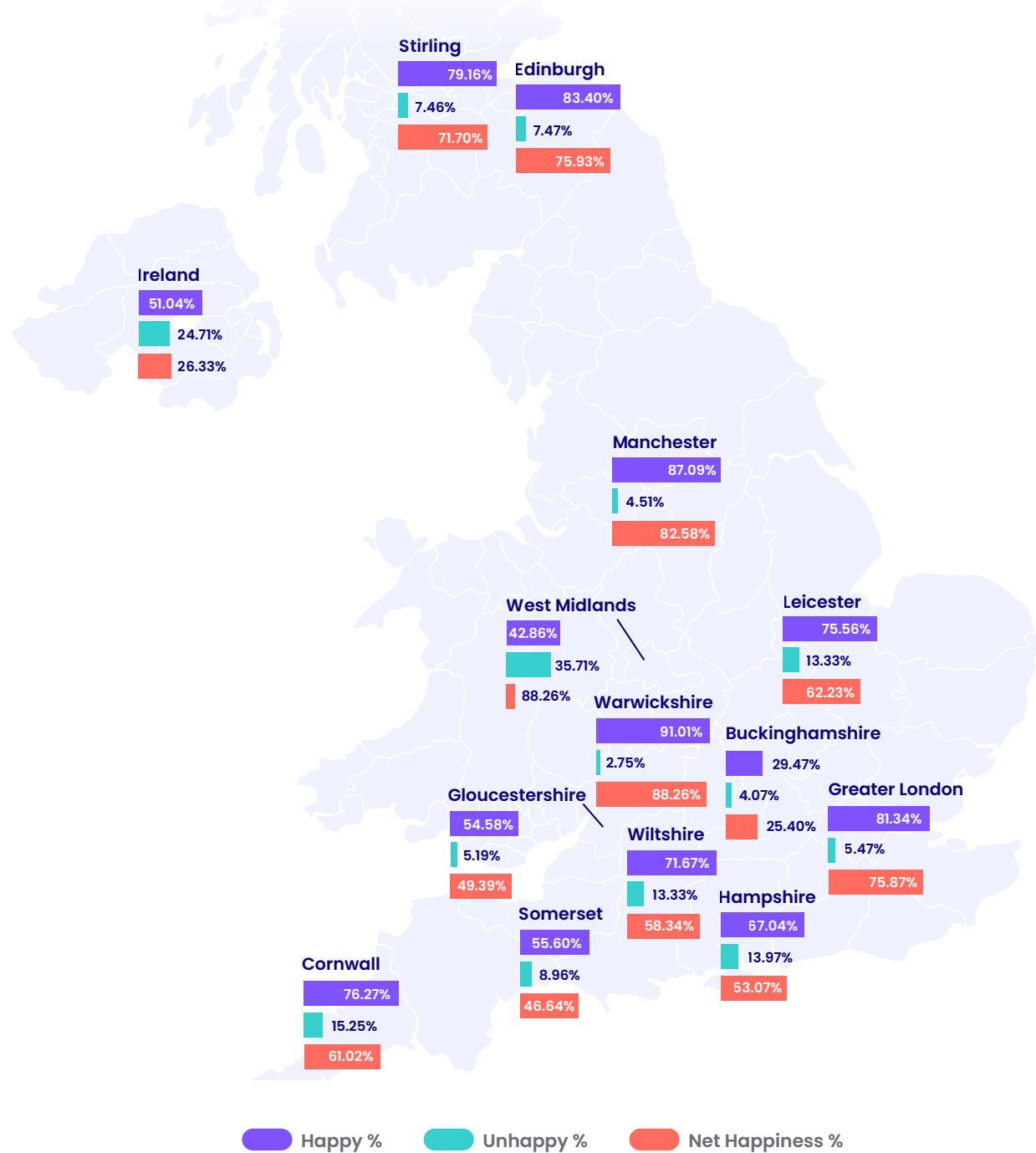
Healthcare and Call Centres Among the UK's Unhappiest Sectors

The 2025 Shift Pulse Report reveals that the unhappiest shift workers in the UK are concentrated in healthcare and high-stress service roles.

- Doctors Offices / Medical Clinics recorded the highest level of dissatisfaction, with a significant 37.84% Unhappy sentiment, nearly double that of the second-ranking sector.
- Following closely are Animal Health (17.95%) and Call Centres (12.00%), both of which are known for emotionally intensive or repetitive work conditions. The appearance of Critical & Emergency Services (12.05%) and Chiropractors (12.93%) within the top five reinforces the persistent strain faced by healthcare professionals working under pressure, often in under-resourced environments.
- Mid-ranking sectors such as Delivery & Postal Services (6.97%) and Care Facilities (6.22%) suggest that physical demands, unpredictability, or emotionally taxing duties may be contributing to lower sentiment among these shift-based workers.
- Private Services (Chefs, Gardeners etc.), Cleaning Services, and Catering round out the top ten, with Unhappy scores ranging between 5.6% and 8.6%. While lower than the highest-ranking sectors, these figures still highlight underlying challenges in roles that may involve long hours, low wages, or limited control over schedules.

These insights paint a clear picture: frontline healthcare workers, customer support teams, and physically demanding service jobs face the greatest emotional and structural burdens in the UK's shift work economy. Addressing burnout, improving staffing levels, and creating pathways to more predictable and supportive work environments may be critical for improving sentiment in these sectors.

Regional Spotlight: Where UK Shift Workers Are Happiest — And Where There’s Work To Be Done



The latest Shift Pulse data reveals sharp regional contrasts in how shift workers across the UK feel about their work environments, with Net Happiness Scores ranging from a high of +88.26% in Warwickshire to a low of +7.15% in the West Midlands.


- Warwickshire leads the nation in shift worker satisfaction, with a staggering 91.01% reporting positive sentiment and just 2.75% feeling unhappy — a Net Happiness Score of 88.26%, more than 22 percentage points above the national average. Close behind is Manchester, where a high proportion of shift workers (87.09%) report being happy, supported by a remarkably low 1.23% Unhappy rating.
- Major metropolitan areas also perform strongly. Greater London (75.87%) and Edinburgh (75.93%) are well above the national Net Happiness average of 65.43%, suggesting that larger cities may offer more structured schedules, competitive wages, or a broader range of shift opportunities that better align with worker needs.
- Stirling, often overlooked in national workforce reports, also stands out with a Net Happiness Score of 71.70%, while Leicester (62.23%) and Wiltshire (58.34%) fall just below the national benchmark — reflecting a more mixed sentiment in mid-performing regions.
- On the other end of the spectrum, Buckinghamshire (25.40%), Ireland (26.33%), and West Midlands (7.15%) report the lowest Net Happiness Scores. High Unhappy ratings — particularly 35.71% in West Midlands and 24.71% in Ireland — raise questions about systemic challenges in these areas, whether from understaffing, limited flexibility, or lack of support structures.

The spread in these results highlights the impact that local economic conditions, industry mix, and managerial practices can have on shift worker wellbeing. As employers and policymakers look to build thriving shift-based workforces, regional sentiment data like this offers a roadmap for where attention and investment are most urgently needed.

* **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.**

1,218,123 Shift Pulse Survey responses were analysed 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