



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, revenue slides and business results suffer. That's why tools like Deputy's Shift Pulse matter. They give leaders a clear picture of what's working — and what isn't — from the frontline to the back of house.

This year's Shift Pulse Report is based on over 2.97 million end-of-shift surveys, submitted anonymously by shift workers between April 2024 and April 2025 — a 250% increase from the 839,000 responses analysed last year. This growth reflects not just a wider adoption of Shift Pulse, but the growing appetite from businesses to understand how sentiment links to performance, retention, and team wellbeing.

The data reveals a workforce that is still positive, but increasingly stretched.

The happiest workers in 2025 are those in sectors like outpatient care, in-home support, catering, and gyms, and in states like Queensland and the Northern Territory. What they have in common is clear: consistent schedules, strong team environments, autonomy, and a sense of purpose. Workers here report not just satisfaction, but stability — and in many cases, emotional reward.

By contrast, the highest levels of frustration and stress are concentrated in call centres, cleaning service companies, tobacco/vape stores, and supermarkets, and in states like ACT and Victoria. In these environments, workers are more likely to cover gaps, deal with unpredictable rosters, work solo, or shoulder emotional labour with little support. Many are managing multiple part-time jobs just to keep up — a reality that fragments wellbeing and robs employees of job satisfaction.

The signal is clear: when flexibility, fairness, and staffing fall short, stress rises, and sentiment drops. For businesses, the message is equally clear: To retain great staff, protect your culture, and boost performance, you must build workplaces that prevent employee burnout.

That means more innovative scheduling, more predictable hours, and real investment in the workforce experience. Because when shift workers feel seen, supported, and stable, they show up stronger for your customers and your business.



Silvija Martincevic

CEO, Deputy

Methodology

The 2025 Shift Pulse Report is based on an analysis of **2,973,467 Shift Pulse survey responses** submitted by shift workers across Australia 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 categorises 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 Centres, Cafes), and geographic level (e.g. States and Territories).

Introducing the Net Happiness Score

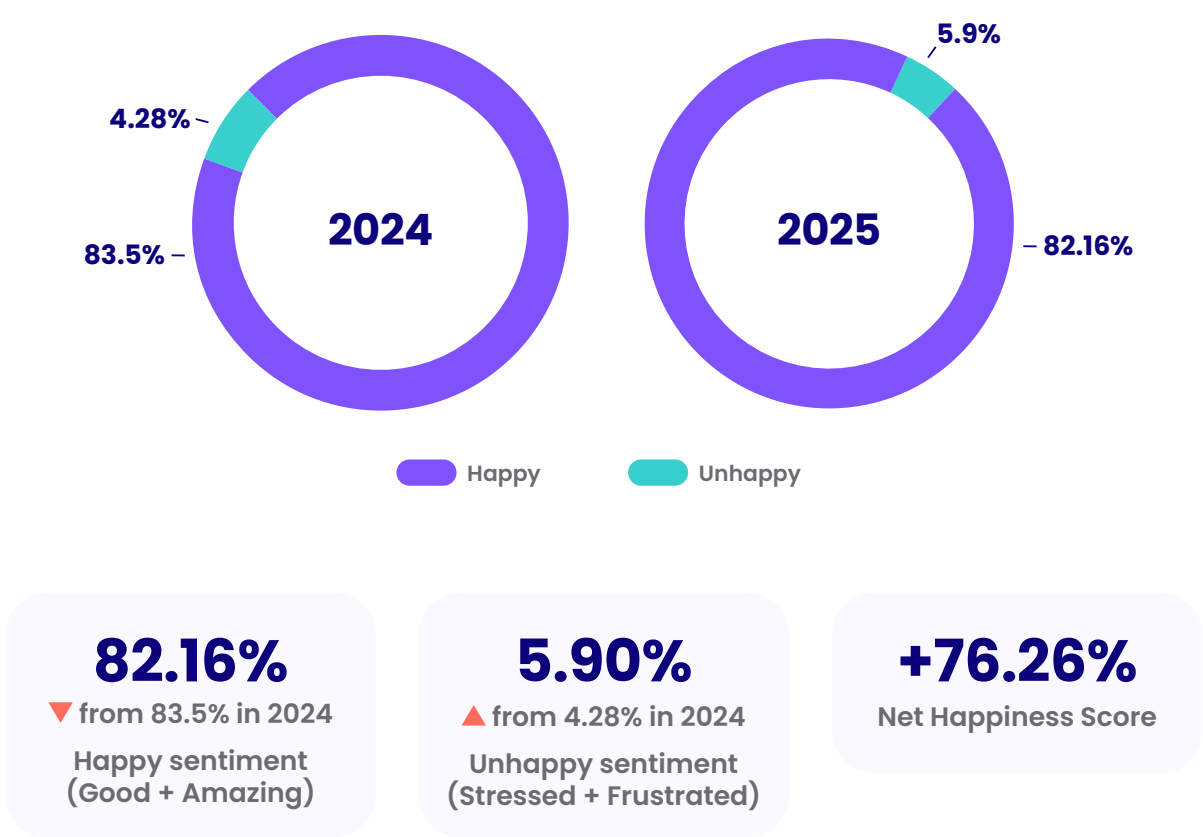
The Net Happiness Score, a single metric summarising overall emotional well-being in a given industry or group, is new to the 2025 edition of the Shift Pulse Report.

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.

Aussie shift workers are mostly happy, but negative sentiment is growing



In 2025, 82.16% of Australian shift workers reported feeling happy at the end of their shifts, a slight drop from 83.50% in 2024. At the same time, the percentage of workers feeling stressed or frustrated rose from 4.28% to 5.90%. As a result, the nation’s Net Happiness Score declined from +79.22% to +76.26%, reflecting a workforce that’s still largely positive, but feeling the strain more than it did a year ago.

What’s behind the decline?

The decline in happiness isn’t just a drop in overall numbers—it reflects a shift in how strongly shift workers feel. Peak satisfaction is giving way to more neutral responses, with fewer workers finishing their shifts feeling “Amazing.” Instead, more are reporting feeling “Good” and, increasingly, just “Okay.” While most shift workers still feel positive overall, the mood has become more muted than it was a year ago.

This change reflects growing pressure across the workforce. Australia’s shift workers are resilient, but satisfaction is slipping in sectors where wages aren’t keeping up with inflation and scheduling consistency is breaking down. It’s leading to unpredictable income, emotional fatigue, and less day-to-day satisfaction.

Three key economic realities are driving this shift:

- Inflation is outpacing wage growth, meaning workers are earning less in real terms for the same effort.
- Poly-employment is now common, especially in Retail and Services, forcing workers to juggle jobs, often across different employers, to make ends meet.
- Schedule control remains unequal, with some industries offering flexibility and autonomy, while unpredictable rosters and last-minute changes plague others.

Shift workers aren’t checking out — they’re burning out. As financial and scheduling pressures mount, they’re adjusting expectations just to keep going.

Happiest shift workers are in Hospitality. Retail ranks lowest.

Parent Industry	Happy %	Unhappy %	Net Happiness %
Hospitality	83.17%	6.75%	76.42%
Healthcare	81.57%	4.65%	79.92%
Services	81.13%	4.47%	76.66%
Retail	80.42%	6.81%	73.61%

Purpose, flexibility, and team culture drive the highest morale

Hospitality leads in Happy sentiment (83.17%), with shift workers in catering, cafés, and fast food reporting strong team connection, social energy, and a clear rhythm to their working hours. Despite a high-pressure environment, the emotional reward from direct customer service and team dynamics helps buffer against stress, supported by consistent scheduling and workforce cohesion. Healthcare and Services also report solid Happy percentage scores, particularly in outpatient care, beauty, gyms, and allied health. These segments often involve purpose-driven work, autonomy over hours, and ongoing client relationships — factors that correlate strongly with higher morale.

Retail, while lowest among the parent industries, still shows over 80% Happy sentiment, suggesting that many shift workers remain engaged despite increasing strain.

Inconsistency, burnout, and underemployment fuel rising stress

Retail and Hospitality report the highest Unhappy sentiment rates (6.81% and 6.75%, respectively). In Retail, poly-employment and shift unpredictability are rising the fastest. Workers often cover shifts across multiple employers, leaving little room for feedback, recognition, and career growth. This contributes to fatigue and limits emotional engagement. Scheduling unpredictability and underemployment further exacerbate this frustration.

Hospitality, though high on overall happiness, also shows rising burnout. While workers benefit from a consistent, team-oriented atmosphere, the demanding nature of weekend and evening shifts can often lead to erratic schedules and increased emotional strain.

Healthcare and Services maintain relatively low Unhappy sentiment, though aged care and cleaning roles are notable exceptions. These roles carry emotional weight and often lack the same schedule control or peer support found in clinics or personal care environments. While sectors like beauty, gyms, and wellness thrive on autonomy and strong community connections, others — such as cleaning companies and call centres — are marked by rigid shifts, limited flexibility, and low recognition.

Top 10 Happiest Industry Sectors (2025)

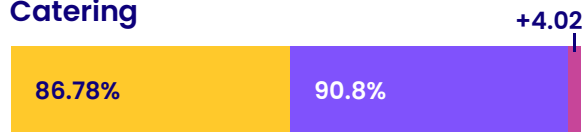
In 2025, the happiest shift workers are those operating in roles grounded in purpose, personal connection, and flexible hours — but not all sectors are trending upwards. While some industries are seeing remarkable gains in sentiment, others that typically perform well are showing signs of emotional fatigue.

Outpatient care centres



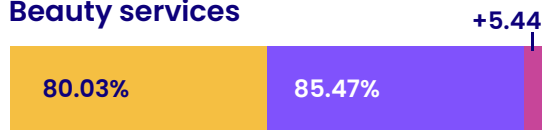
Outpatient Care Centres (91.95%) top the list for the first time, and while they weren't tracked in last year's dataset, the sheer volume of happiness in this category reflects a clear formula: stable rosters, clear clinical environments, and meaningful, non-acute patient care. Workers benefit from task clarity, continuity of care, and minimal overnight disruption.

Catering



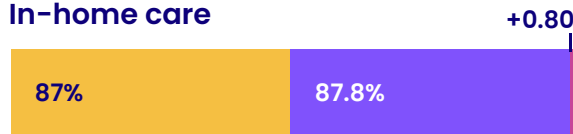
Catering (90.80%) jumped an impressive +4.02pp from 2024. Despite being high-pressure, this sector offers structure, camaraderie, and a sense of completion with each event-based shift. These environments are often highly social and well-organised, making them emotionally rewarding.

Beauty services



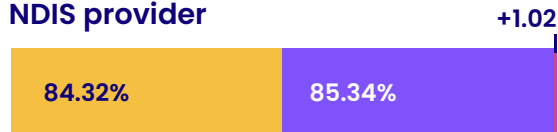
Beauty Services (85.47%) saw the biggest increase overall, rising +5.44pp. In a year of rising stress elsewhere, this jump suggests that personal care roles, often independent or team-led with high client interaction, are delivering confidence, connection, and emotional reciprocity to workers. The combination of autonomy and appreciation is a potent morale booster.

In-home care

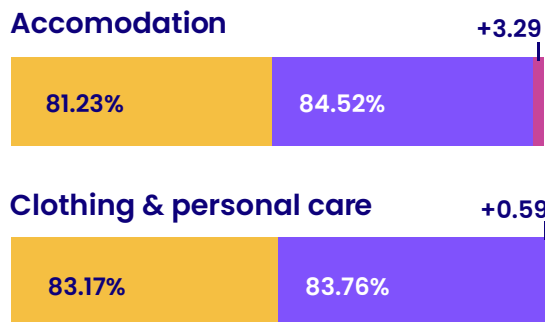


In-Home Care (87.80%, +0.80pp) and **NDIS Providers (85.34%, +1.02pp)** continue to show strong positive sentiment, fuelled by purpose-driven work and long-term relationships with clients. Workers in these sectors often report strong emotional connection to their roles, which helps offset the challenges of care delivery.

NDIS provider



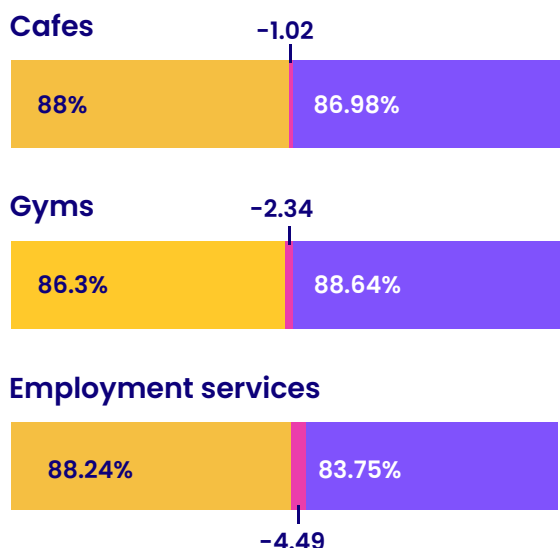
2024 2025 Net Happiness



Accommodation (84.52%) posted a solid gain of +3.29pp, likely reflecting improved staffing and operational conditions in the post-COVID travel rebound. Despite being part of the 24/7 economy, improvements in team structure and predictable rosters may be improving worker satisfaction.

Clothing & Personal Care Retail (83.76%, +0.59pp) continues to perform better than broader retail, suggesting that smaller-format stores or brand-led retail may offer more community, flexibility, or job pride than large-format chains.

On the other hand, several historically strong-performing sectors have declined



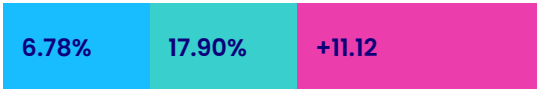
Cafés and Coffee Shops (86.98%) saw a modest -1.02pp drop, while **Gyms (86.30%)** declined more sharply at -2.34pp. These industries, typically known for strong social connection and steady hours, may be feeling the pinch from economic strain, staff turnover, or expanded responsibilities (e.g. customer management, upselling). As rosters tighten, the emotional buffer these roles once provided may be wearing thin.

The most significant decline in the top 10 comes from **Employment Services (83.75%)**, which dropped by -4.49pp. Workers in this sector are increasingly caught between rising client needs and limited support infrastructure. High caseloads, emotional labour, and bureaucratic pressure are likely eroding morale in what was once one of the most positive professional environments in shift-based work.

Top 10 unhappiest industry sectors (2025)

Unhappy sentiment increased in nearly every sector this year, with Call Centres, Sit Down Restaurants, Bars, and Retail seeing the sharpest rises in worker stress and frustration. The root causes vary, but the common threads are roster instability, understaffing, emotional labour, and limited autonomy.

Call Centres



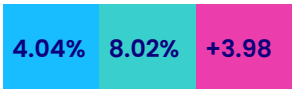
Call Centres experienced the most dramatic increase — a staggering +11.12% jump in unhappy sentiment (from 6.78% in 2024 to 17.90% in 2025). This sharp spike suggests a system under strain: KPI pressure, repetitive tasks, limited flexibility, and little schedule control are pushing workers toward emotional fatigue. For many, job demands have intensified while meaningful support has not.

Tobacco and Vape Stores



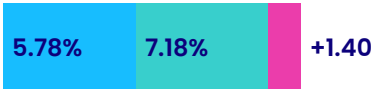
Tobacco and Vape Stores, tracked for the first time, report an unhappy rate of 13.86% — the second highest overall. These roles are often solitary, low-autonomy, and high in conflict right now due to the police squads targeting the sector with the outlawing of vapes across Australia. Without support or job progression, burnout rises quickly.

Sit Down Restaurants



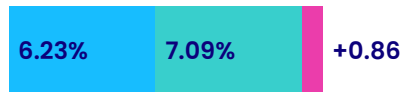
Sit Down Restaurants saw unhappy sentiment nearly double, rising +3.98% to 8.02%. Like Bars (+2.44pp) and **Retail (Other)** (+1.40pp), these sectors are grappling with staff shortages, growing customer tension, and schedule unpredictability, particularly on weekends and evenings. Despite their social energy, they're high-pressure, emotionally demanding environments with rising expectations and less downtime.

Retail (Other)

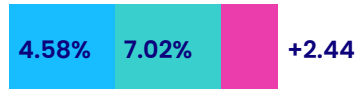


2024 2025 Net Happiness

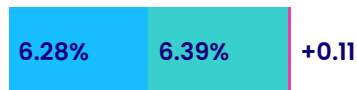
Supermarkets



Bars



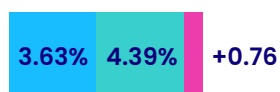
Cleaning services



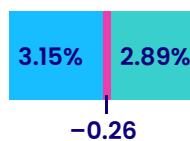
Security services



Childcare centres



Delivery & postal



Even sectors like **Supermarkets (+0.86pp)** and **Security Services (+0.98pp)**, which traditionally offer routine and structure, are seeing a rise in stress. These roles often lack recognition, require workers to operate solo, and involve high physical or mental demands.

Cleaning Services (+0.11pp) and **Childcare Centres (+0.76pp)** also report rising frustration. Both require emotionally or physically intensive labour, often without the autonomy or flexibility seen in higher-performing sectors. For many in these roles, the work is essential, but invisible.

Only **Delivery & Postal** showed a minor improvement (-0.26pp), possibly due to greater independence, outdoor work, and growing demand for delivery roles.

The rise in Unhappy sentiment is not a sign of disengagement — it's a signal of exhaustion. Shift workers across these sectors are being stretched thinner, working harder, and receiving less in return; emotionally, financially, and structurally.

Happy industry traits

✓ **Schedule predictability**

Most of these sectors operate in controlled environments with consistent hours and minimal last-minute rostering.

✓ **Autonomy and task clarity**

Workers know what's expected of them and have clear role boundaries (e.g. pathology, outpatient care, personal services).

✓ **Purpose-driven work**

Health-adjacent roles, like in-home care, outpatient, allied health, and veterinary services, are emotionally rewarding.

✓ **Community-based team structures**

Cafés, beauty services, and gyms foster high-trust, small-team cultures where workers feel supported and seen.

Unhappy industry traits

✗ **High emotional labour**

Jobs in call centres and childcare demand constant emotional effort with little recovery, increasing the risk of burnout.

✗ **Solo or isolated work environments**

Security, cleaning, and delivery roles often involve low interaction with peers and high self-management burden.

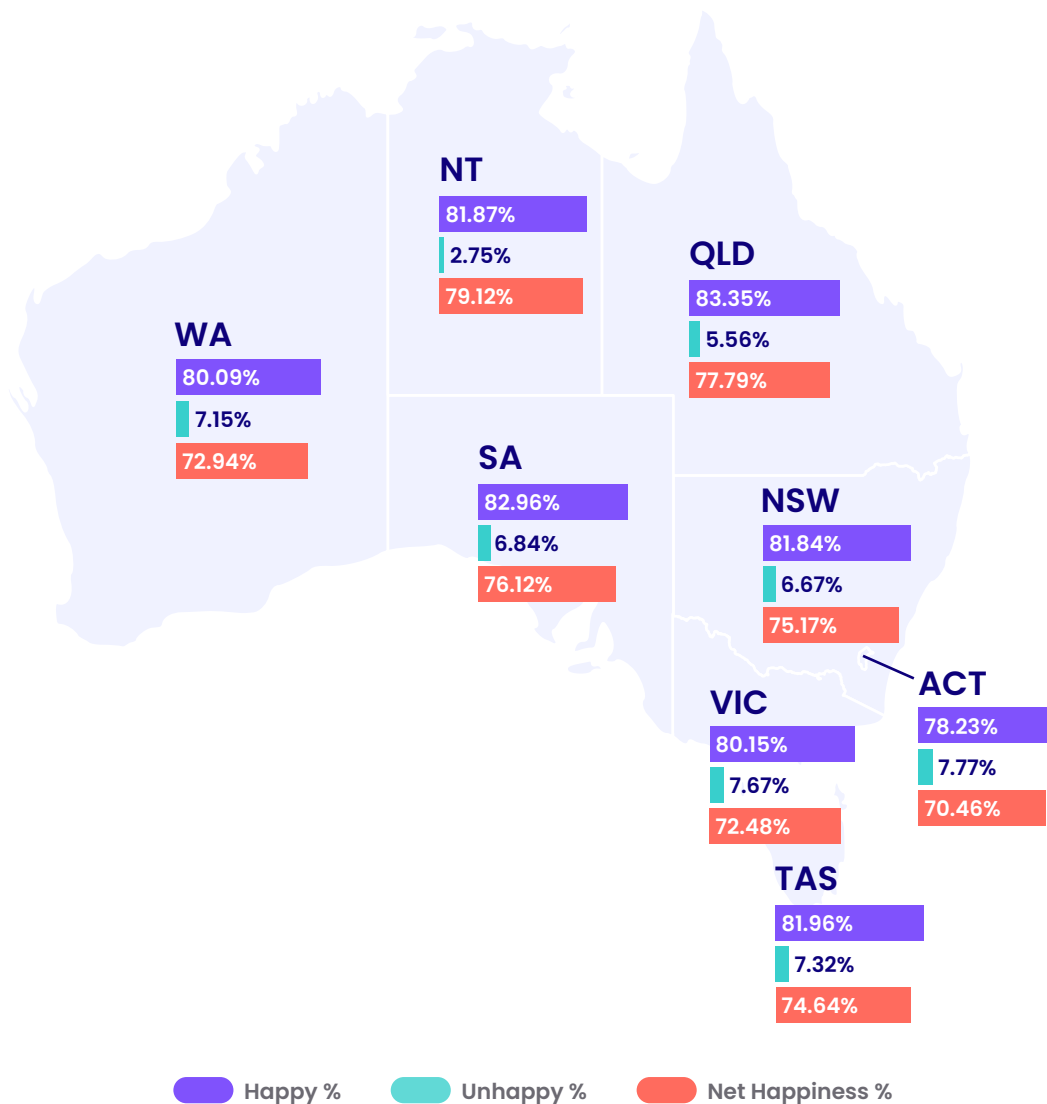
✗ **Schedule volatility and limited control**

These workers are more likely to receive last-minute roster changes or juggle multiple jobs to make up hours.

✗ **Understaffing and rising expectations**

Especially in cleaning, restaurants, and retail — shift workers are being asked to do more with less.

QLD has the happiest Shift Workers, NT the least stressed



Australia's shift worker sentiment in 2025 shows a widening emotional divide across states, with strong performance in the north and centre, and growing strain in the south and capital.

- Queensland (Net Happiness: 77.79%) leads the country, outperforming the national average by +2.86 percentage points. Its workforce continues to benefit from the state's large hospitality and healthcare sectors, where strong team culture, reliable rostering, and a buoyant service economy help reinforce morale. South Australia (76.12%) also tracks above the national average, with stable public sector employment and fewer roster disruptions supporting positive sentiment.

- The Northern Territory presents a unique story: while its Happy % (81.87%) is mid-pack, it ranks #1 in Net Happiness at 79.12% — driven by Australia’s lowest Unhappy % (2.75%). This suggests a low-burnout environment, likely supported by smaller team sizes, less congestion, and tight-knit communities where shift workers feel more supported and less isolated.
- Tasmania (74.64%) and New South Wales (75.17%) hover just below the national average of 76.26%, reflecting resilient but increasingly stretched workforces. In both states, rising frustration in customer-facing roles — particularly retail, cleaning, and services — is beginning to weigh down overall morale, despite relatively strong happiness scores.
- At the bottom of the rankings, Western Australia (72.94%), Victoria (72.48%), and the ACT (70.46%) are seeing the sharpest declines. Each is more than 3 percentage points below the national average, with the ACT lagging by –5.80 percentage points. These states also report the highest levels of stress and frustration, with Unhappy sentiment above 7%.
- In Victoria, cost-of-living pressures and ongoing stress in healthcare and frontline public services are major contributors to emotional fatigue. Schedule unpredictability and rising poly-employment, where workers juggle multiple part-time roles, are common in key sectors.
- The ACT, despite its smaller population, shows the lowest Net Happiness nationally. Government-adjacent industries, resourcing constraints, and high service demand may be intensifying emotional strain, particularly in aged care, disability support, and administrative shift roles.

* **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.**

2,973,467 Shift Pulse Survey responses were analysed for this report.



**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