

THE HOSPITALITY LABOR REPORT

A Year in Review 2025

2025

THE **STAFFING** AGENCY



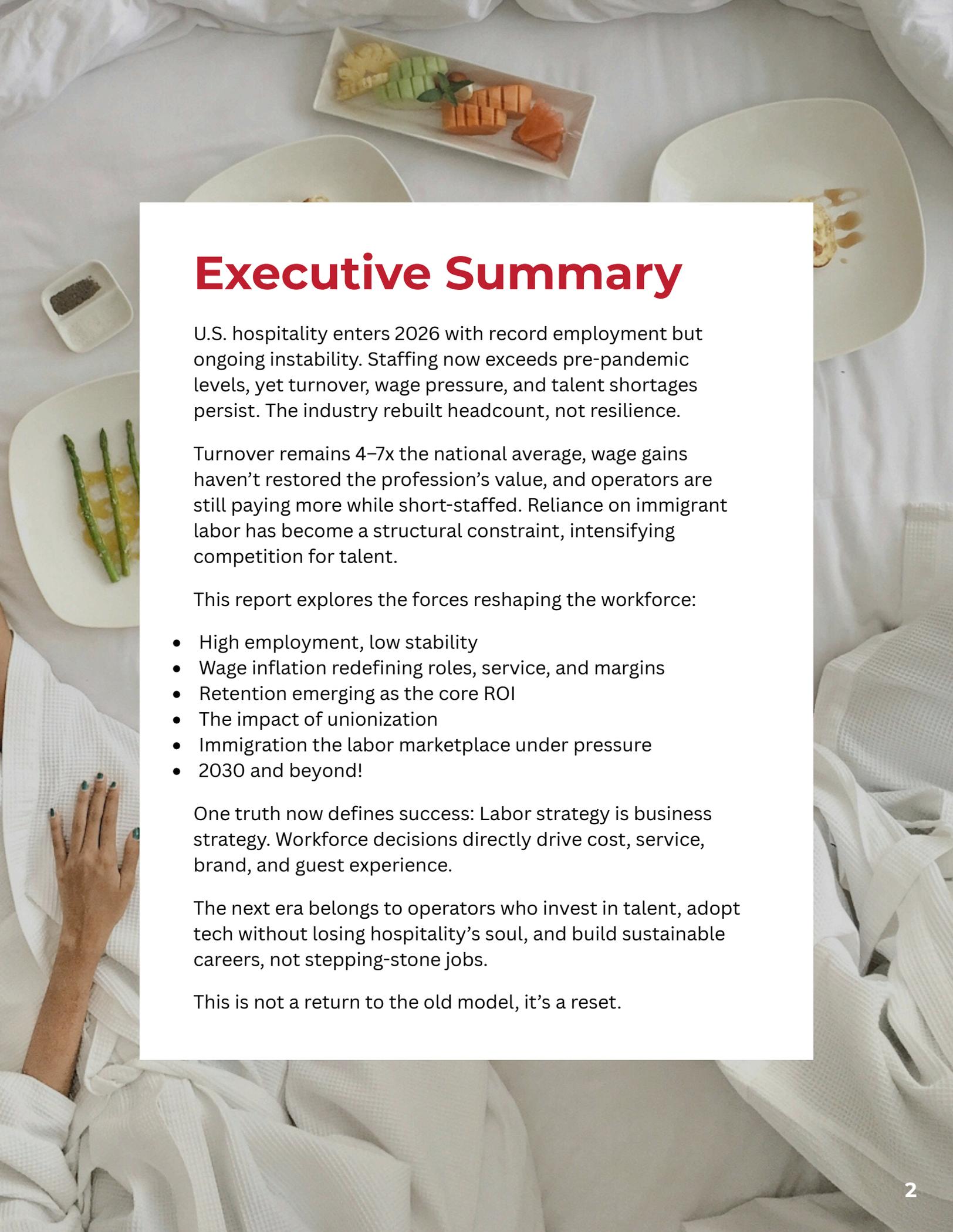
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Executive Summary

U.S. hospitality enters 2026 with record employment but ongoing instability. Staffing now exceeds pre-pandemic levels, yet turnover, wage pressure, and talent shortages persist. The industry rebuilt headcount, not resilience.

Turnover remains 4–7x the national average, wage gains haven't restored the profession's value, and operators are still paying more while short-staffed. Reliance on immigrant labor has become a structural constraint, intensifying competition for talent.

This report explores the forces reshaping the workforce:

- High employment, low stability
- Wage inflation redefining roles, service, and margins
- Retention emerging as the core ROI
- The impact of unionization
- Immigration the labor marketplace under pressure
- 2030 and beyond!

One truth now defines success: Labor strategy is business strategy. Workforce decisions directly drive cost, service, brand, and guest experience.

The next era belongs to operators who invest in talent, adopt tech without losing hospitality's soul, and build sustainable careers, not stepping-stone jobs.

This is not a return to the old model, it's a reset.

Executive Letter

The hospitality industry has always been a mirror of the broader economy, reflecting cultural shifts, consumer expectations, and the value we place on human connection. Today, as we enter 2026, that reflection is clear: we have record employment, yet record turnover. Innovation and creativity are thriving, yet burnout and instability are growing. Our greatest strength- our workforce, is also our greatest vulnerability.



At its core, hospitality is about people, those who serve, cook, welcome, and care, often long before a guest ever arrives. This white paper captures the complexity of the moment. We have rebuilt our teams, but we haven't rebuilt stability. Labor costs continue to rise, turnover remains a defining challenge, and the talent pipeline has been strained by shifting expectations and immigration policies that directly affect the very people who have always formed the backbone of our kitchens and dining rooms. These are not abstract pressures, they shape the guest experience, the culture of our teams, and the sustainability of our businesses.

Having led companies rooted in creativity, culture and community, I have seen firsthand that the path forward is not simply about hiring more, it is about investing more. We must create workplaces where hospitality is a profession of purpose and pride. That means building real internal pathways: line cooks into sous chefs, bartenders into beverage directors, hosts into future general managers. It means protecting and supporting immigrant workers who have long upheld the craft and character of our industry.

Technology and economics will influence the decade ahead, but resilience will come from within. The future of hospitality will be defined by retention, training, mentorship, and cultures of genuine care. This report is both a benchmark and a call to action, to value our people not as labor, but as the heart of the experience itself.

Amber Asher

Amber Asher
Former CEO, Standard International

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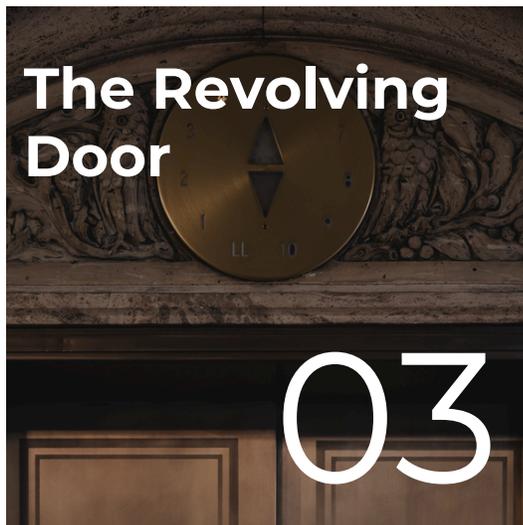
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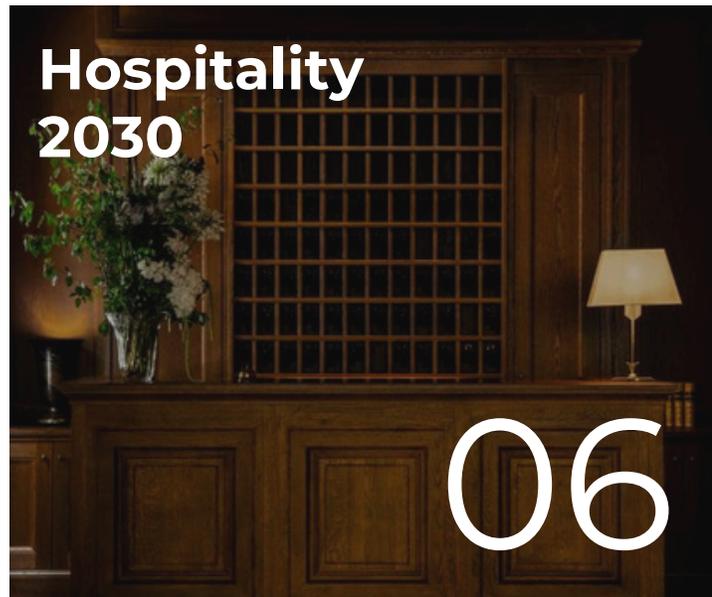
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The Paradox of Recovery
Growth Without Stability



The U.S. hospitality industry employs more workers today than at any point in history. Yet beneath the surface of record headcounts lies fragility: staffing gaps, 70–80% annual turnover, and structural changes in what it even means to be “fully staffed.” Recovery, in other words, has not translated into stability. The paradox of growth and precarity underscores why sustainable staffing solutions are now an urgent priority.

Inside The Hospitality Workforce

The U.S. hospitality workforce sits on three interconnected sectors: each with its own dynamics, challenges, and labor realities.



Restaurants and foodservice make up nearly 75% of industry jobs and are projected to hit 15.9M workers and \$1.53T in sales by late 2025.



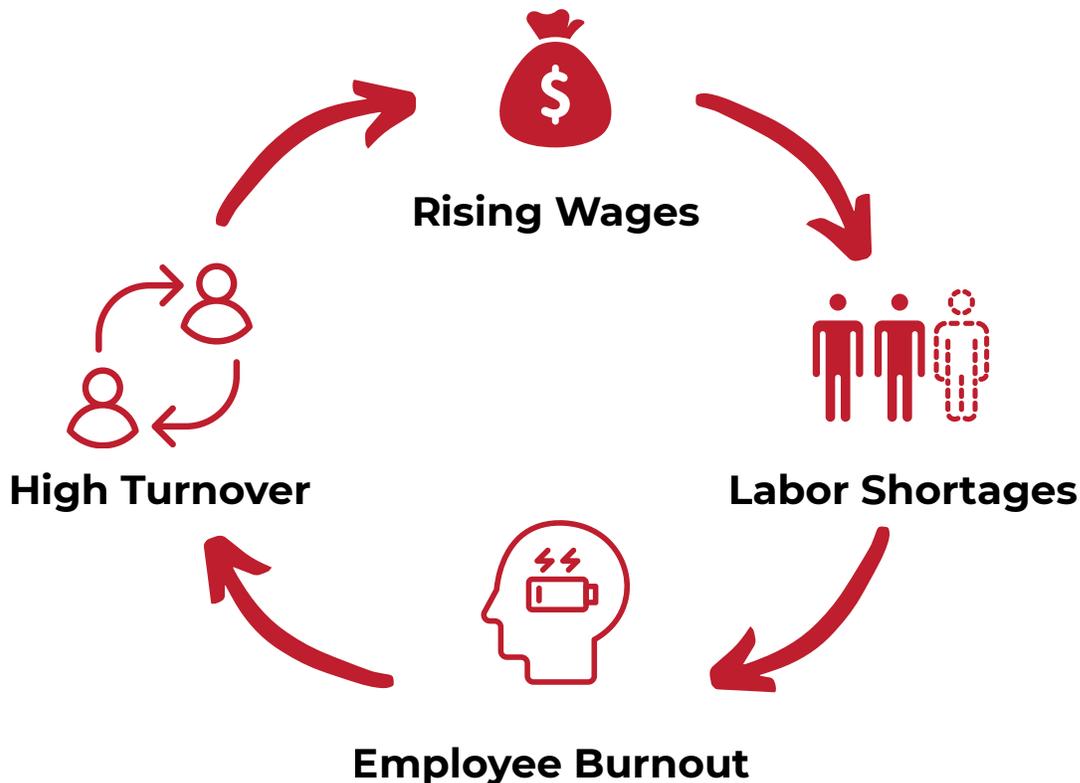
Hotels and lodging employ 2.17M workers in 2025, still below the 2.3M pre-pandemic peak and remain highly labor-intensive.



Arts, entertainment & recreation has rebounded above pre-2020 levels, reaching 2.69M jobs in 2025, up 8% in five years.

The Wage Reality

Wages have risen, but not enough to resolve the industry's image problem. Average pay in leisure and hospitality stands at \$22.70/hour in 2025, nearly 30% higher than four years ago. Yet the majority of non-supervisory workers earn closer to \$20/hour, working about 24 hours a week. This translates to roughly \$25,000 annually, less than half the U.S. average salary (\$54,132). Hospitality jobs remain viewed as temporary "landing pads" rather than long-term careers.



Turnover: The Persistent Crisis

Even with employment totals rising, staffing gaps persist. The sector continues to record annual turnover rates of 70–80%, compared to a national average of 10–15%. Quick-service restaurants often exceed 100% churn in crew positions. Hotels struggle to retain not just entry-level staff but also supervisory managers, a destabilizing trend that hinders service quality.

Open postings have declined, from 1.18 million in March 2024 to 985,000 in March 2025, but shortages in skilled culinary and supervisory roles remain stubbornly unfilled. Lower demand does not equal stability.

Post-Pandemic Legacy

The shadow of COVID-19 still shapes the workforce. While restaurants have exceeded their pre-2020 peaks, hotels remain under-staffed in most states, only Montana and Washington, D.C. are projected to surpass 2019 hotel staffing levels by 2025.

Stability vs. Volatility

On the surface, layoffs and discharges have improved, falling from over 300,000 in November 2024 to 146,000 in March 2025. Employers appear more committed to holding onto staff. Yet this is offset by persistently high voluntary quit rates, which remain among the highest of any U.S. industry.

As of early 2025, the quit rate in leisure and hospitality stands at around 4.8% per month, more than double the national average of 2.2%.



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The challenge ahead is not simply rebuilding the workforce, but redefining it for a new era of expectations, technology, and labor realities.

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Economic Weight

Operators are under mounting pressure. Rising wages continue to compress margins, prompting many to adopt “lean staffing” models, fewer housekeepers, streamlined menus, and increased reliance on self-service technology. Yet paradoxically, demand keeps growing.

Hospitality remains one of the fastest-recovering sectors of the U.S. economy, driven by strong leisure travel, returning international visitors, and pent-up demand for in-person experiences. The result is an industry trying to serve more guests with fewer workers, a structural tension that is redefining what “service” means in the post-pandemic era.

The Bigger Picture

The hospitality workforce in 2025 is larger and better paid than five years ago, but also more fragile.

Turnover remains unsustainably high, recovery is uneven across states, and many roles are still viewed as temporary rather than career-building. The sector has moved from crisis to fragility, stable in numbers, unstable in structure. Whether it can transition to long-term stability will depend on how quickly operators invest in retention, training, and career pathways instead of short-term hiring fixes.

The challenge ahead is not simply rebuilding the workforce, but redefining it for a new era of expectations, technology, and labor realities.



The Price of Service
How Rising Labor Costs
Are Rewriting Hospitality

Labor Cost Trends



Since 2019, hospitality has seen one of the steepest wage growth trajectories of any U.S. industry. Average hourly pay in leisure and hospitality rose from \$16.84 in January 2020 to \$22.70 by early 2025, an increase of nearly 35%. For production and nonsupervisory staff, wages averaged around \$20.02 an hour in 2025, but hours remain short at roughly 24 per week, translating to only about \$25,000 annually.

It's not just that labor is more expensive, it's that the definition of work itself is being rewritten to match new cost realities.

Rising wages, compressed margins, and shifting expectations about what jobs should look like are fundamentally reshaping the hospitality industry. Employers are not only paying more; they are reorganizing roles, redefining "fully staffed," and in many cases, relying on technology to offset higher labor costs.

The Great Shift in Wages

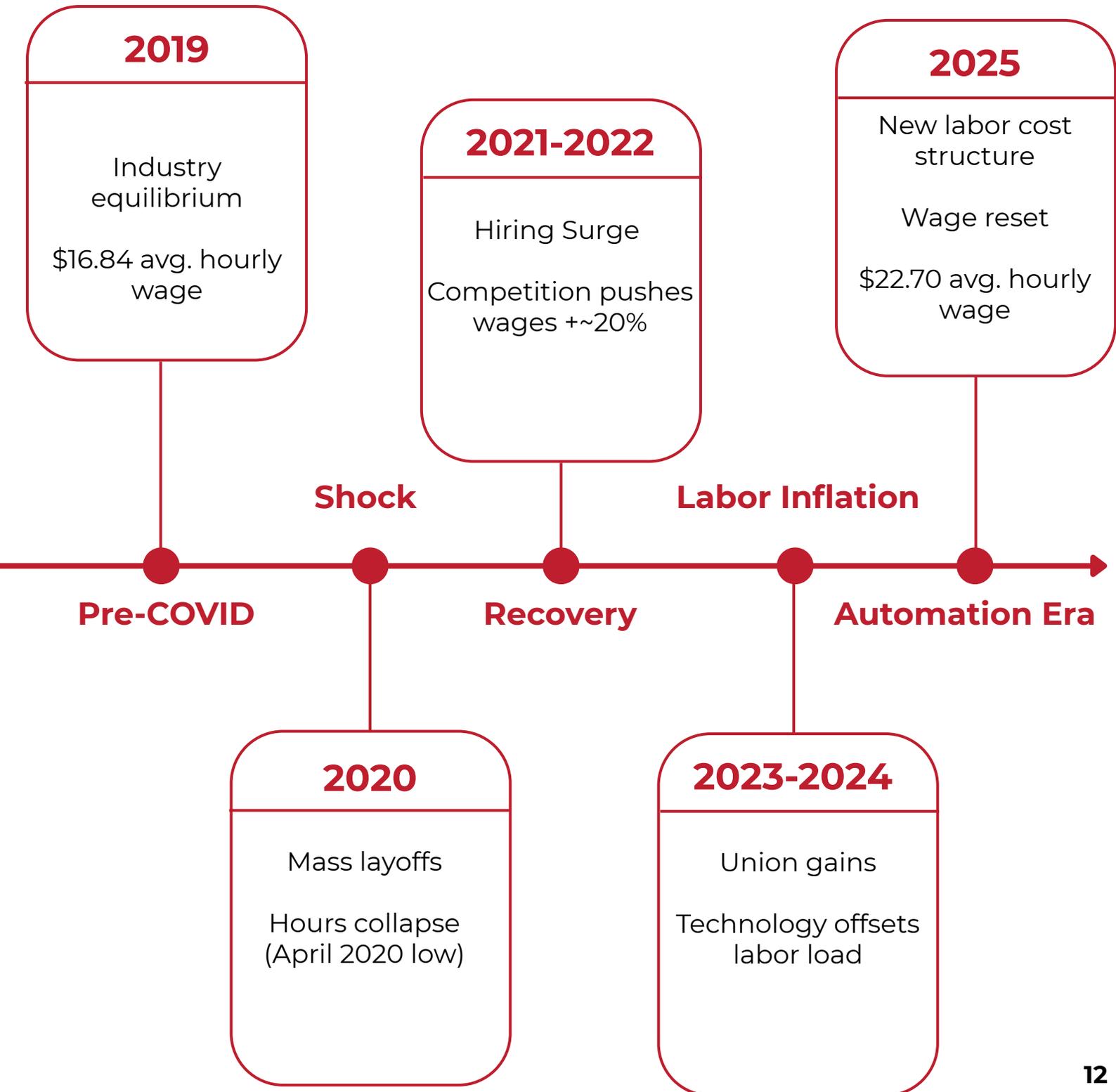
Hospitality has seen one of the steepest wage growth trajectories of any U.S. industry since 2019.

Average hourly pay in leisure and hospitality rose from \$16.84 in January 2020 to \$22.70 by early 2025, an increase of nearly 35%.

THE WAGE RESET

HOSPITALITY COMPENSATION 2019-2025

The years that redefined pay, productivity, and talent dynamics.





The Widening Pay Gap Inside Hospitality

The sharpest wage gains have come in specialized and managerial positions.

Executive chefs, sous chefs, and pastry chefs are commanding premium salaries amid a shortage of skilled culinary talent. Similarly, director-level roles, franchise, finance, HR, and housekeeping, have each seen growth rates above 40 percent since 2020. Meanwhile, front-line service positions such as servers and bartenders have experienced slower wage growth due to automation such as QR codes, kiosks, and AI-enabled ordering systems.

By contrast, salaried and managerial roles have seen both higher pay growth and greater stability. Average annual earnings for supervisors, department heads, and culinary managers now range between \$55,000 and \$75,000, with executive-level positions exceeding \$100,000 in major markets.

While these gains narrow the gap with other industries, the disparity between hourly and salaried workers underscores the sector's widening divide, one that higher wages alone have yet to close.

THE PROFIT EQUATION

Rising Labor Costs Are Reshaping Hospitality

Margin Compression



Labor costs continue to outpace revenue growth, particularly for independent operators, compressing profitability and accelerating structural change.

Consumer Resistance



Many operators passed wage increases to guests; pricing latitude is now narrowing as consumer sensitivity rises.

Operational Efficiency



Reduced housekeeping, streamlined menus, QR ordering, and automation are now staples, not temporary crisis solutions.

Automation



Service models are evolving. Fewer touchpoints and more automation redefine hospitality delivery without eliminating human roles.



Regional Labor Dynamics

Hospitality wages vary widely depending on geography.

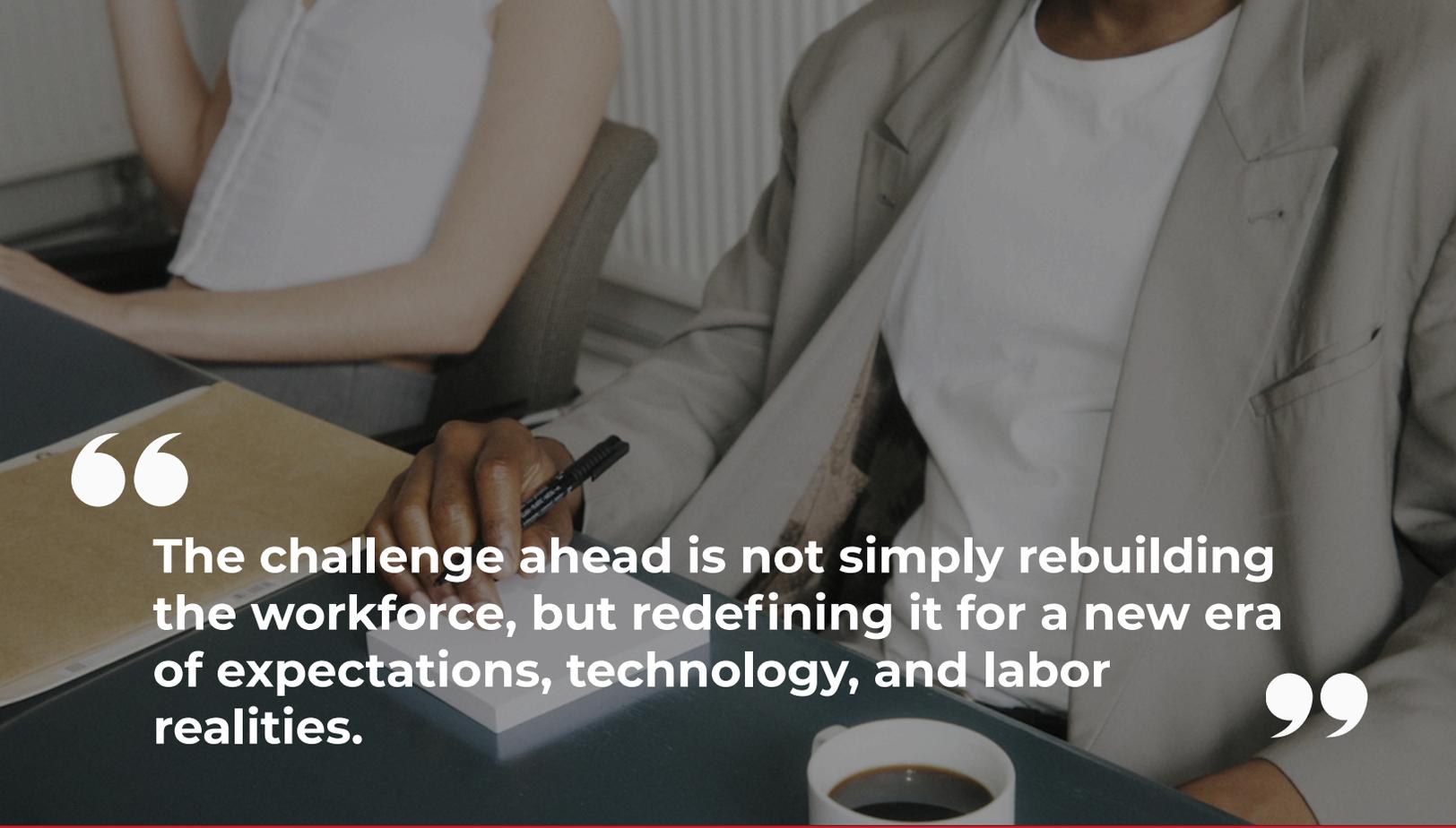
States like New York, California, and New Jersey report the highest averages, reflecting higher living costs, stronger union presence, and more aggressive wage standards. At the other end of the spectrum, Iowa, Montana, and Oklahoma remain among the lowest-paying states, often relying on seasonal or part-time labor to meet demand.

Growth is strongest in tourism-heavy states such as Nevada and Rhode Island, where total compensation has risen by more than 40 percent since 2019. This uneven geography takes place both where employers feel the greatest cost pressures and where workers see the greatest opportunities.

03



The Revolving Door
Retention Is the New ROI



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The challenge ahead is not simply rebuilding the workforce, but redefining it for a new era of expectations, technology, and labor realities.

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Recruiting: Longer Timelines, Higher Stakes

Time-to-fill has doubled:

- Entry-level hospitality roles now take 6+ weeks to fill, up from 30–35 days pre-pandemic.

Hardest roles to hire:

- Kitchen and casino F&B positions are now among the most difficult roles to recruit.

Cost of attracting talent is rising:

- Operators are increasingly relying on signing bonuses, relocation stipends, and flexible scheduling as standard incentives.

Turnover: The Costliest Weakness

- Turnover remains severe, 70% in restaurants and 50% in hotels, versus a 10–15% national average, costing operators \$3,500–\$5,000 per replacement and eroding service quality and institutional knowledge.
- High turnover isn't just a financial drain; it directly impacts the guest experience, leading to delayed check-ins, missed orders, and inconsistent service.



Geography & Retention

- Labor dynamics are increasingly regional.
- Urban markets offset churn through larger labor pools and immigration inflows.
- Secondary and resort markets struggle with capped visas, commuting staff, and limited housing, making retention an essential part of growth strategy, not an HR afterthought.

Bright Spots in Retention

Across all, one theme emerges: when workers see a future, they stay. **Retention isn't just cost control, it's a compounding return on experience, service quality, and brand culture.**

The Path Forward

In hospitality, labor is not a back-office function, it is the guest experience itself. Every interaction, every meal served on time, every room prepared perfectly depends on the people. When staffing falters, service quality, brand reputation, and profitability follow. Operators who stabilize their workforce do more than control costs; they preserve consistency, culture, and trust, the true currencies of hospitality.



The Union Experiment
What Las Vegas Tells Us
About the Future of Labor

Las Vegas has become the most important test case for hospitality labor in the U.S. In 2025, it became the first fully unionized service economy in America. With Fontainbleau's agreement in place, every major Strip resort now operates under a union contract, a dramatic contrast to the national landscape, where only 3% of hospitality workers are unionized.

- Labor costs will reset national wage expectations
- Vegas contract terms may influence other markets
- Operator-union collaboration will shift staffing models



Las Vegas is now the largest laboratory for unionized hospitality in the world.

A Historic Win for Workers

The new contracts are sweeping in scope:

- 32% wage increases over five years
- Roughly 10% raise in year one
- Reduced room quotas for housekeepers
- Expanded safety protections
- Stronger recall rights for laid-off employees

Before these agreements, many hotel employees earned around \$20 an hour. By 2030, wages for key roles are expected to be closer to \$30 an hour, marking the largest wage gains in the Culinary Workers Union's 90-year history. Workers now not only earn more but also enjoy greater job security in an industry long defined by precarity.



The Employer Paradox

For operators, the contracts create a double-edged reality:

Predictability

- Fewer labor disputes and more stable employer–union relations
- A consistent wage baseline across major strip employers
- Potential for lower burnout and improved service consistency

Pressure

- Rising payroll costs squeeze margins already hit by inflation
- **2025** visitor traffic fell **8%** YoY, intensifying profitability concerns
- Turnover remains high, with employees job-hopping for small wage or benefit gains
- **Higher cost to retain**, and an even higher cost to replace staff due to recruiting, onboarding, and training demands

Bottom Line

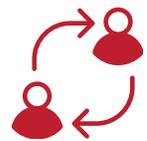
Las Vegas gains labor stability, but at a higher cost of doing business, and turnover still threatens service performance.



+32%
WAGE INCREASE
(2024-2030)



100%
UNIONIZED
STRIP WORKFORCE



60%
TURNOVER RATE
STILL HIGHEST IN U.S.

Union Activism Reshaping Negotiations

Unlike quieter, behind-closed-door deals of the past, the new wave of union activism is public, vocal, and disruptive.

- The 2024–25 Virgin Hotels strike became the longest open-ended strike in decades.
- Hundreds of workers walked out, forcing service disruptions, delayed amenity reopening, and temporary layoffs.
- Solidarity across Strip properties pressured operators to concede more quickly, proving that strikes now carry both financial and reputational risk.



Bottom Line

Las Vegas illustrates what happens when a service-heavy economy becomes fully unionized:

- For workers: precarity decreases, wages and protections increase.
- For employers: stability improves, but flexibility and margin space erode.

Las Vegas is no longer just the entertainment capital of the world; it's the testing ground for America's hospitality labor future. The 2025 contracts delivered unprecedented gains for workers and lasting cost pressures for employers. Whether this model spreads or stalls will define how the next decade of U.S. hospitality balances profitability, equity, and service.



The 2024–25 Virgin Hotels labor dispute set a new benchmark as the industry's longest open-ended strike in decades.

05

The Invisible Backbone

Immigration and the Future of Hospitality Work

Immigrant labor is not peripheral to hospitality- it is one of its foundations. Nationally, nearly one in five workers in the U.S. is foreign-born, but in hospitality that share is far higher. From food preparation and housekeeping to maintenance and back-of-house operations, immigrants disproportionately fill the roles that operators consistently rank as the hardest to staff. These are the jobs that keep kitchens running, rooms clean, and casinos, resorts, and restaurants operating around the clock.

Immigrant Labor

Across restaurants, hotels, and arts and entertainment, immigrant participation is significantly above the national workforce average:

- Restaurants and foodservice: Immigrants make up more than 30% of the workforce, with even higher concentrations in urban markets.
- Hotels and lodging: Roughly one in three roles, especially housekeeping and culinary positions, are filled by foreign-born workers.

This reliance is not evenly distributed. In gateway metros such as New York, Los Angeles, and Miami, immigrant employment accounts for up to 40–45% of hospitality staffing. And in states like Nevada, where the economy is overwhelmingly service-driven, the proportion is even higher.





The Fragility of the System

For operators, immigration is not a policy debate, it is an operational variable. When visa allocations tighten or enforcement actions intensify, the impact is immediate and visible:

- Room turnovers slow because housekeeping staff is stretched.
- Food and beverage outlets reduce hours due to kitchen shortages.
- Operators rely on overtime and premium pay, driving labor costs higher.

Margins, already under pressure from rising wages, face additional compression. Service delivery, the core of hospitality's brand promise, becomes less predictable.

The “What If” Scenario

The dependence on immigrant labor highlights an uncomfortable fragility: What if this workforce disappeared overnight?

- Roughly 10% of the U.S. hospitality workforce is undocumented.
- The jobs most affected would be the ones closest to the guest: room attendants, line cooks, dishwashers, servers.
- Vacancies would spike, wage inflation would accelerate, and service levels would decline sharply.

Margins, already under pressure from rising wages, face additional compression. Service delivery, the core of hospitality’s brand promise, becomes less predictable.

Beyond Recruitment: Building Workforce Resilience

While immigrant labor is indispensable, operators cannot rely on recruitment alone to solve staffing gaps. Resilience requires:

- Retention strategies that reduce turnover among immigrant workers already in place.
- Career pathways that transform short-term jobs into long-term employment.
- Cross-training programs that give teams flexibility when labor shortages spike.

The conclusion is clear: hospitality’s fortunes are inseparable from immigration, but survival depends on making this reliance sustainable.

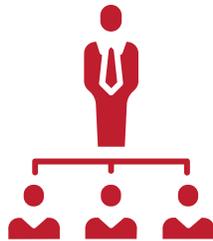


Bottom Line

The American hospitality industry is more dependent on immigrant labor than any other sector of the economy. This reliance brings both strength and fragility: strength in the scale and dedication of the workforce, fragility in the risks posed by enforcement, visa caps, and political uncertainty. For operators, immigration is not an external issue. It is a core business variable that shapes margins, service delivery, and ultimately guest experience. The companies that win in this environment will be those that not only compete for immigrant talent but also invest in keeping it.



20%



Supervisors & Managers

Immigrant Share: ~20%



50%



Culinary, Servers, Front Desk

Immigrant Share: ~40-50%



70%

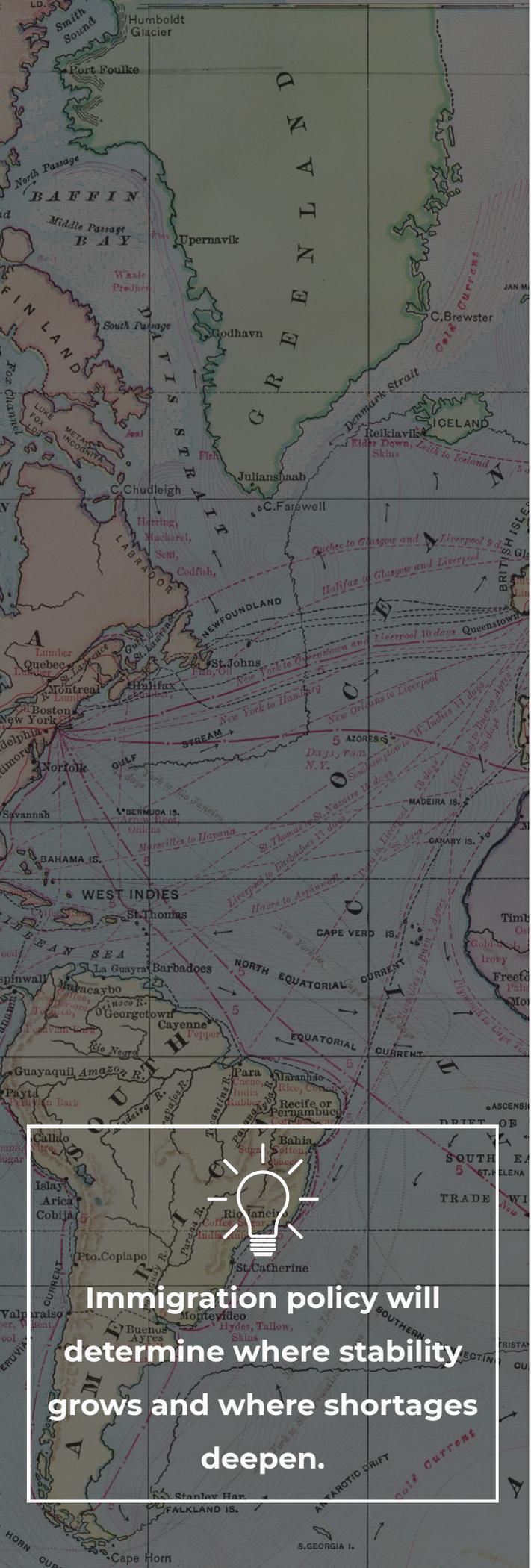


Housekeeping, Dishwashing, Maintenance

Immigrant Share: ~60-70%

A photograph of a dark wood-paneled room. In the center is a large window with a grid pattern. To the left of the window is a vase filled with white flowers and greenery. To the right is a lamp with a white shade. The room has a classic, elegant feel.

Hospitality 2030
Smart, Scarce, and Shifting



The next five years will test whether U.S. hospitality can stabilize its workforce or enter a new cycle of volatility. Two forces will define that outcome: immigration policy and artificial intelligence (AI).

Immigration: The Labor Lever

Immigration remains the single biggest source of entry-level labor. **Roughly one in three hospitality workers is foreign-born, compared with 18% across the wider U.S. workforce.** Roles like housekeeping, kitchen prep, and banquets rely most heavily on this pipeline.

But that pipeline is tightening. New visa fees, stricter wage rules, and processing delays nearing a year have made staffing increasingly unpredictable.

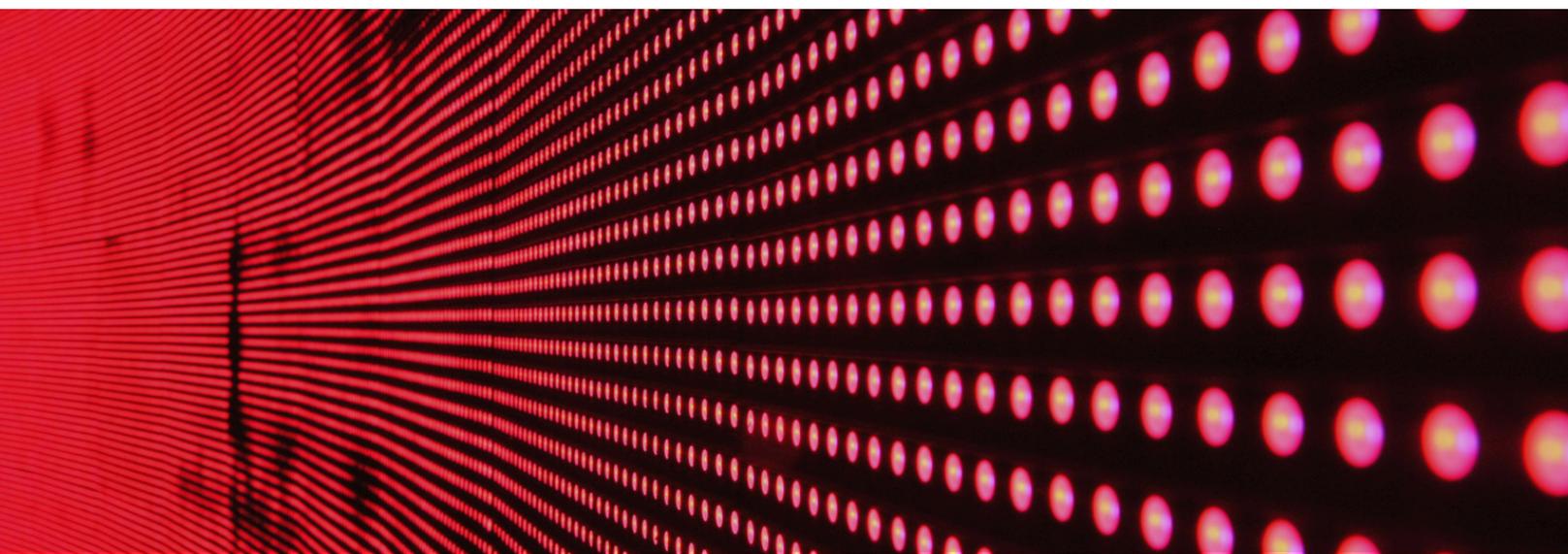
If visa caps expand, resort and seasonal markets can recover stability. If they contract or slow further, chronic understaffing will persist, especially outside major metros. Cities such as **New York, Miami, and Los Angeles** may still attract labor through immigration inflows, widening the divide between urban cores and regional markets.

Immigration policy will determine where stability grows and where shortages deepen.

Artificial Intelligence: The Efficiency Shift

AI is reshaping both how operators hire and work.

- Smart scheduling tools now forecast occupancy and staffing needs, shortening recruitment cycles.
- AI chatbots handle up to 70% of guest requests, easing front-desk strain.
- Kitchen robotics automate up to 20% of back-line tasks, while predictive AI optimizes housekeeping schedules.



The roles most at risk are repetitive, process-driven jobs, front desk, call center, and basic F&B prep, while supervisory, culinary, and high-touch guest service roles will remain essential.

Crucially, AI also creates new jobs: tech supervisors, guest experience curators, and predictive maintenance managers. **The workforce will shift, not shrink.**



By 2030, as much as 25% of hospitality tasks could be automated, demanding a more skilled, tech-literate workforce.

2030 Outlook: A Divided Workforce

Three trends are converging:



Entry-Level Pressures:

Persistent shortages in guest-facing roles; dependence on immigration to fill the gap.



Wage Polarization:

Entry-level instability persists as managerial and technical roles gain demand and pay. Wages may top \$27/hour by 2030, with uneven growth.



Regional Divide:

Gateway cities benefit from labor inflows and AI investment, while resort and secondary markets struggle with visa constraints and seasonality.



The industry's trajectory will depend on how immigration, technology, and demand interact, not on any single trend.

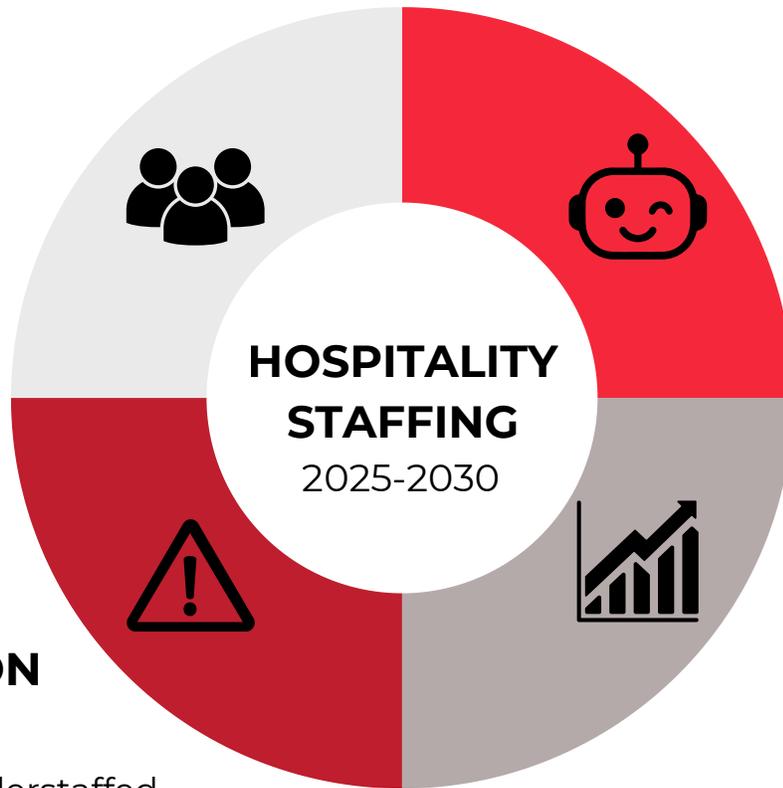


**OPEN
IMMIGRATION
+SLOW AI**

Stable but costly

**OPEN
IMMIGRATION
+FAST AI**

Efficient and tech driven



**TIGHT
IMMIGRATION
+SLOW AI**

Stressed and understaffed

**TIGHT
IMMIGRATION
+FAST AI**

AI-Dependent

Bottom Line

Hospitality's future won't be defined by fewer jobs, but by different jobs.

Immigration will decide the size of the workforce. AI will redefine how it functions.

Demand will stay strong, keeping pressure high even as automation spreads. Operators that thrive will be those who plan for flexibility now, retaining talent, reskilling workers, and integrating technology without eroding the guest experience.

By 2030, success will belong to those who treat workforce strategy as the heart of brand strategy.

Closing Thoughts

To the leaders shaping the next decade of hospitality, This industry has always rewarded resilience, creativity, and a deep commitment to serving others. Today, those values matter more than ever. We sit at a defining moment: record demand, an evolving workforce, and a marketplace being reshaped by technology, immigration, and guest expectations. The challenges are real, but so are the opportunities.



Our view is simple: people will remain the advantage. Technology will accelerate us. Immigration will sustain us. But culture, training, retention, and leadership will determine who thrives. The operators investing in their teams, building pathways instead of pipelines, and treating talent as strategy, not expense, will lead the next era of hospitality.

At The Staffing Agency, we have the privilege of supporting employers who believe in this future, a smarter, stronger, more dignified industry where careers are built, not borrowed. We see every day that workforce strategy is business strategy. And the companies leaning into that truth are already outperforming.

Thank you for reading, for your leadership in the field, and for the work you do to advance our shared industry. I look forward to continuing this conversation, and to helping operators and teams build what comes next.

Steven Kamali

Steven Kamali, CEO
The Staffing Agency

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THE **STAFFING** AGENCY

A RECRUITING COLLECTIVE

The Staffing Agency is a collection of industry-specific recruiting companies built to solve real staffing challenges across hospitality, luxury households, grocery/retail, and hotels. Each division focuses on one vertical, with teams that understand the work and deliver talent quickly, quietly, and effectively.



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