



How Gen Z is Rewriting the Rules of Hourly Work



Contents

Introduction p. 3

Data Analysis p. 4

Inflation & The Cost of Living Crisis p. 5

Shift Work Trends in the U.S. p. 6

The Rise of Gen Z & The Arrival of Gen Alpha in Shift Work p. 8

Shift Worker Sentiment & Economic Recovery p. 12

City Trends: Shift Work Recovery & Regional Growth p. 14

Regulatory Shifts: The Push for Stability & Flexibility p. 21

Retail Industry p. 22

Hospitality Industry p. 30

Healthcare Industry p. 38

Services Industry p. 44

Conclusion: The Future of Shift Work in the U.S. Economy p. 49

Contributors p. 50

Introduction

Shift work is the backbone of the U.S. economy, powering industries that keep our daily lives running. Yet, in recent years, businesses, workers, and policymakers have faced unprecedented challenges—from the economic turbulence of the Cost of Living Crisis to shifting workforce demographics and rapid technological change. The landscape of shift work is evolving, and understanding these changes is more critical than ever.

At Deputy, we are at the forefront of this transformation, providing data-driven insights into employment trends, worker sentiment, and policy impacts. The Big Shift: How Gen Z is Rewriting the Rules of Hourly Work uncovers how businesses have adapted, where shift workers are thriving, and what the future holds for millions who rely on shift-based work.

One of the key trends in this report is the rise of Gen Z as the dominant shift work generation, with Gen Alpha now beginning to enter the workforce. As a new generation steps up, employers must rethink how they engage, train, and retain talent in a labor market shaped by higher worker expectations, new scheduling preferences, and digital transformation.

We also see the continued resilience of healthcare and hospitality, which have expanded despite periods of economic uncertainty. Meanwhile, retail and services are evolving, with e-commerce logistics reshaping traditional storefront jobs and home-based healthcare services becoming one of the fastest-growing employment sectors in the U.S. The shift toward aging-in-place solutions is not just creating jobs—it's redefining how and where care is delivered.

Technology plays an even greater role in how workers and businesses operate, with AI and automation enhancing—not replacing—shift work jobs. Workers across industries have made it clear: stability, flexibility, and fair pay matter more than ever. Businesses that invest in smarter workforce planning, equitable scheduling, and competitive wages will attract and retain talent and future-proof themselves in an evolving labor market.

At Deputy, we remain committed to helping businesses and workers navigate this transformation, ensuring that shift work remains a sustainable, thriving, and valued part of the global economy. Whether you are a business leader, policymaker, or worker, these insights provide a clear roadmap for building a stronger, more resilient workforce in the years ahead.



Silvija Martincevic
CEO, Deputy



Data Analysis

The Big Shift: How Gen Z is Rewriting the Rules of Hourly Work was produced by the leading scheduling software platform, Deputy, utilizing aggregated Deputy customer data. The report features an industry-focused data analysis of U.S. shift workers across the hospitality, retail, healthcare, and services sectors.

Chief Economist at Geografia, Dr. Shashi Karunanethy, analyzed **41 million shifts and 278 million hours of 429,620 shift workers** to produce the insights in this report.



Dr. Shashi Karunanethy

Chief Economist at Geografia

Dr. Karunanethy provides specialized advisory services in policy and market design; thought leadership in the city, workforce, and future technologies spaces; and economic strategies. He works with a variety of federal and state government entities, international development organizations, tech start-ups, and ASX-listed companies. Prior to this, he held senior professional roles in several consulting firms. He obtained his Ph.D. from the University of Melbourne.

Industry sample sets will not add up to the overall number of shift workers due to data being analyzed from other industries not called out in the report, churn, and other events that occurred between December 2022 and December 2024.

This data has been normalized to account for seasonality and demand of workforce fluctuations throughout the week (e.g. weekdays vs. weekends). In the report, "women" refers to female-identifying Deputy users, and "men" refers to male-identifying users.



The Big Shift Report

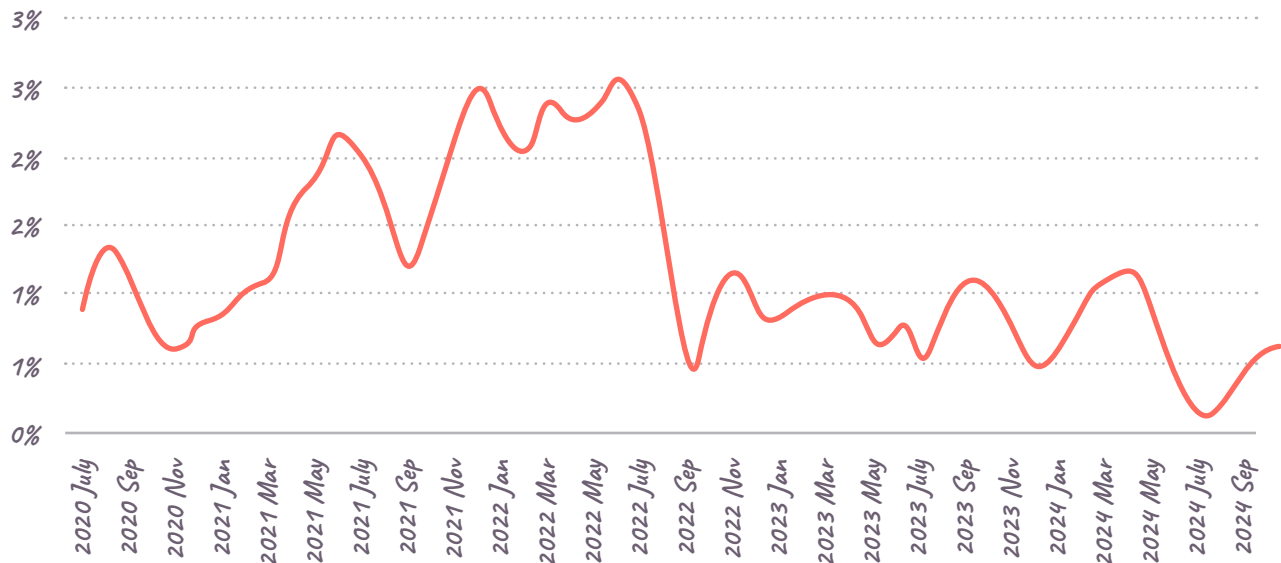
Inflation & The Cost of Living Crisis

Over the past two years, inflation in the U.S. has fluctuated sharply, reaching key highs in response to global economic disruptions. This period—widely recognized as the Cost of Living Crisis—has shaped spending behaviors and business operations. However, as inflationary pressures began easing through late 2024, signs of stabilization in the cost of essential goods and services have emerged.

Despite these economic headwinds, shift work employment has remained notably resilient, with demand in some sectors continuing to grow. With inflationary recoveries expected to persist into 2025, shift work employment is projected to maintain its upward trajectory, reinforcing its critical role in the evolving labor market.

US Inflation Rate: Cooling Off

Source: US Bureau of Economics (2024)



Shift Work Trends in the U.S.

Despite economic headwinds, shift work employment continued to expand in 2024. Healthcare led job growth, with an 8.9% increase in shift work employment. Hospitality followed, rising by 5.2%, while the services sector grew by 3.3%.

Industries such as healthcare and hospitality are expected to maintain strong demand for shift workers, reinforcing the importance of competitive wages and flexible working conditions to attract and retain talent.

Meanwhile, retail faces ongoing challenges, with Deputy data highlighting employment pressures in the sector.

Within healthcare, the sectors driving shift work employment growth included:

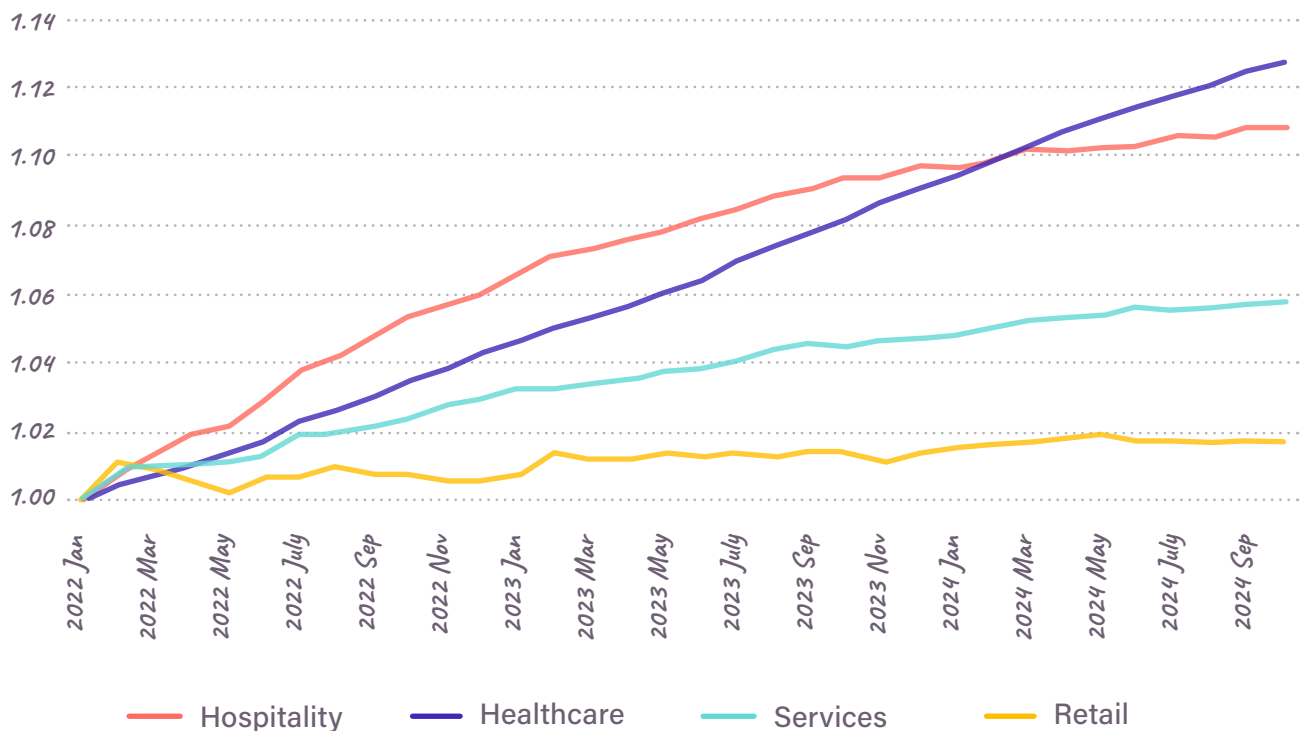
- Social Assistance (+5.2%)
- Hospitals (+4.1%)
- Nursing Homes & Aged Care (+3.8%)

Beyond healthcare, hospitality saw notable gains, with the strongest job growth in:

- Bars & Clubs (+4.1%)
- Accommodation (+1.2%)
- Restaurants (+0.6%)

Deputy Job Index by Parent Industries

Source: Indexed to Jan 2022 using data from the US Department of Labor (2024) and Deputy (2024)



Retail's Evolving Workforce

Retail job growth remained modest in 2024, rising just 0.9% from the previous year. The sector has been particularly vulnerable to economic pressures, including inflation and rising borrowing costs, which have constrained consumer spending as well as shifting consumer behavior, with spending prioritizing more affordable experiences, particularly in hospitality.

A closer look at retail sub-sectors reveals that consumers have deferred spending on luxury and high-ticket items, impacting employment in:

- Furniture & Home Furnishings (-2.0%)
- Garden & Home Appliances (-1.9%)
- Health & Personal Care Retailers (-0.8%)

However, retail jobs are not disappearing—rather, the nature of retail work is evolving. The industry is shifting toward a hybrid model that blends physical and digital commerce, creating new demand for roles in logistics and fulfillment.

E-commerce expansion is driving a surge in logistics jobs, which are now integral to the broader retail ecosystem. Traditional back-end retail roles—such as warehousing, inventory management, and last-mile delivery—are increasingly recognized as core components of the industry.

Despite these transformations, retail employment levels have experienced long-term structural declines. The industry continues to adapt by leveraging digital retail opportunities and embracing technology to automate routine tasks, reshaping the future of retail work.

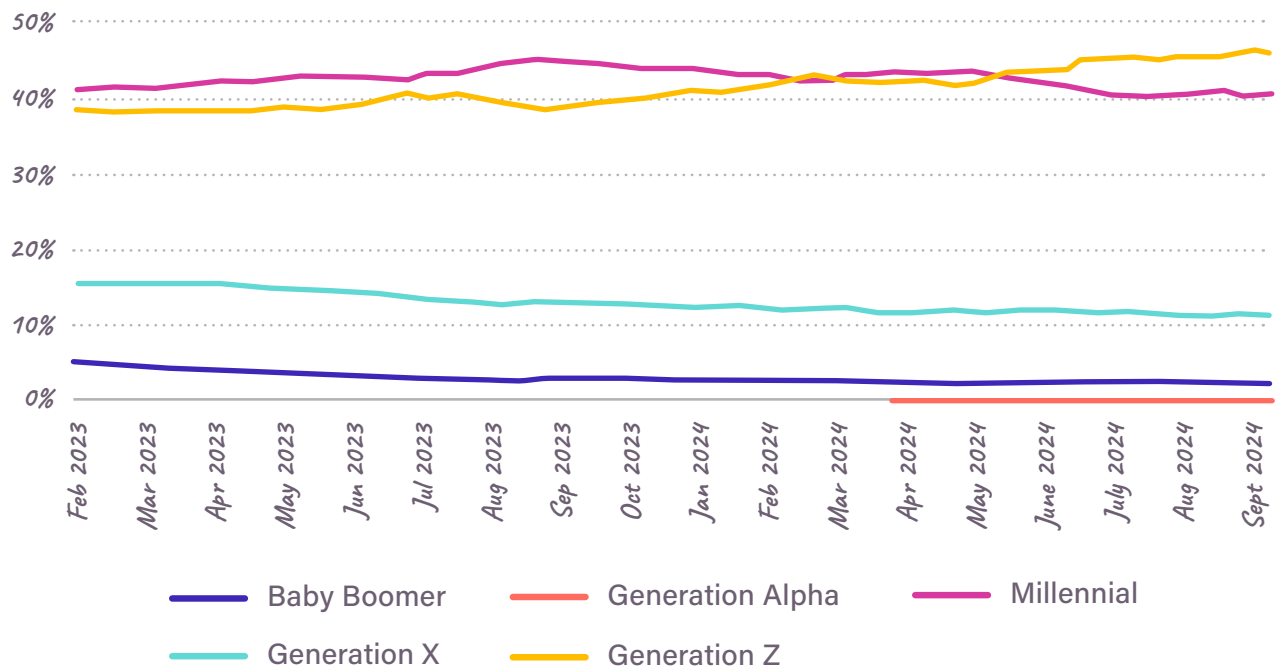


The Rise of Gen Z & The Arrival of Gen Alpha in Shift Work

Gen Z has officially overtaken Millennials as the dominant generation in the shift work economy. This shift is particularly significant in healthcare—the last major industry where Millennials previously held the majority. Now, Deputy data confirms that Gen Z is the largest working generation across all industries on its platform.

Healthcare - Shift Work Hours by Generation

Source: Deputy (2024)



As the leading generational workforce, Gen Z is actively shaping shift workers' expectations, habits, and preferences. Deputy survey data reveals key traits that set them apart:

- Gen Z is mobile: 29% are looking for job opportunities outside their current employer.
- Gen Z is ambitious: 32% want to advance within their existing company.
- Gen Z prioritizes pay and workplace culture—they are unwilling to compromise on either.

With their mobility, career-driven mindset, and demand for fair wages and strong work environments, Gen Z now plays a defining role in shaping shift work employment strategies for businesses across industries.

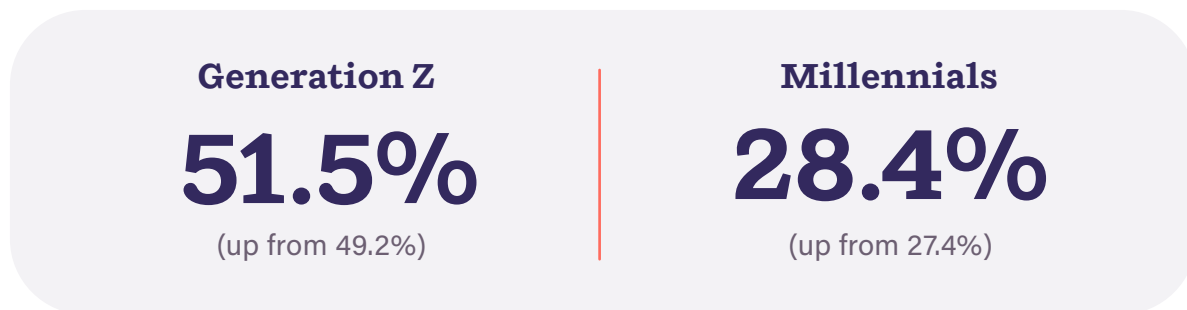


The Next Wave:

Gen Alpha's Entry into Shift Work

Deputy data also highlights the early workforce entry of Gen Alpha, particularly in healthcare and services sectors in 2024. Their presence in shift work was first felt in 2023, primarily in hospitality and retail, and while their representation remains small, they are now appearing across all industries.

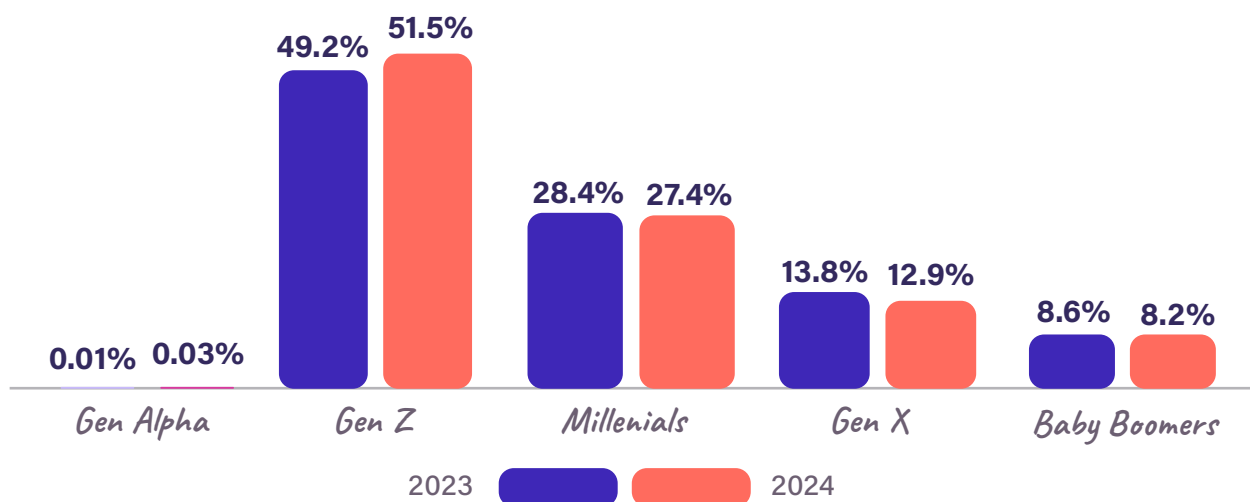
Share of Total Shift Work Hours by Generation:



Many in Gen Alpha are still school-aged at this stage, but within the next 2-3 years, their workforce participation is expected to rise significantly as they reach college age and enter adulthood. While small in numbers today, Gen Alpha is on track to surpass Gen Z in the shift work economy by 2038.

Share of All Shift Work Hours by Generation

Source: Deputy (2024) Comparing Jan-Oct 2023 and 2024 Years



Women in Shift Work: **A Growing Presence Amid Industry Shifts**

Women continue to make up the majority of shift workers across all industries. This trend is most evident in healthcare, where women account for 82% of all shift work hours recorded on Deputy's platform.

Despite economic pressures from the Cost of Living Crisis, the share of female shift work hours grew in 2024, led by:

- Hospitality (+1.9%)
- Healthcare (+1.2%)

Notably, retail's employment slowdown did not negatively impact female shift work participation, marking a stark contrast to the COVID-19 pandemic, when female shift workers were disproportionately affected.

Within hospitality, female shift workers saw notable gains in:

- Catering (+7%)
- Fast Food Restaurants (+7%)
- Cafés & Coffee Shops (+5%)

Despite overall declines in the services industry, certain sectors still saw growth in female shift work hours, particularly in:

- Call Centers (+4%)
- Care Facilities (+4%)

However, major declines in female shift work representation were observed in:

- Accommodation (-14%)
- Supermarkets (Food & Beverage Stores) (-11%)
- Cleaning Services (-11%)
- Delivery & Postal Services (-9%)

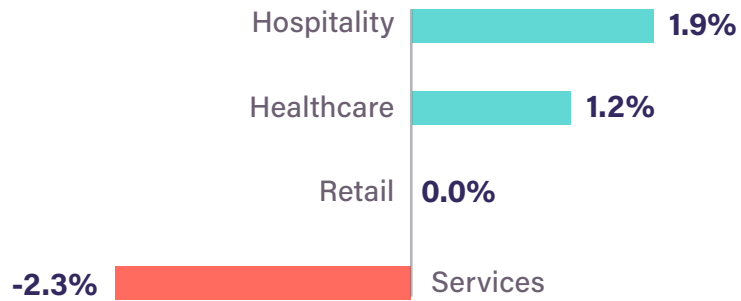
It's important to note that a decline in the share of female shift work hours does not necessarily mean fewer women are working. Instead, Deputy data suggests a shift in job creation toward traditionally male-dominated roles, particularly in logistics and back-end operations.

As logistics jobs continue to grow across shift work industries, ensuring equitable access to these roles—alongside training opportunities—will be critical to supporting women's participation in historically male-dominated sectors.



Change of Share Female Employment 2024

Source: Deputy (2024) Comparing Jan-Oct 2023 and 2024 years



Shift Worker

Sentiment & Economic Recovery

The U.S. emerged from the Cost of Living Crisis in 2024, as inflation saw meaningful declines in the second half of 2023. This economic shift paved the way for Federal interest rate reductions, providing much-needed relief to businesses and consumers.

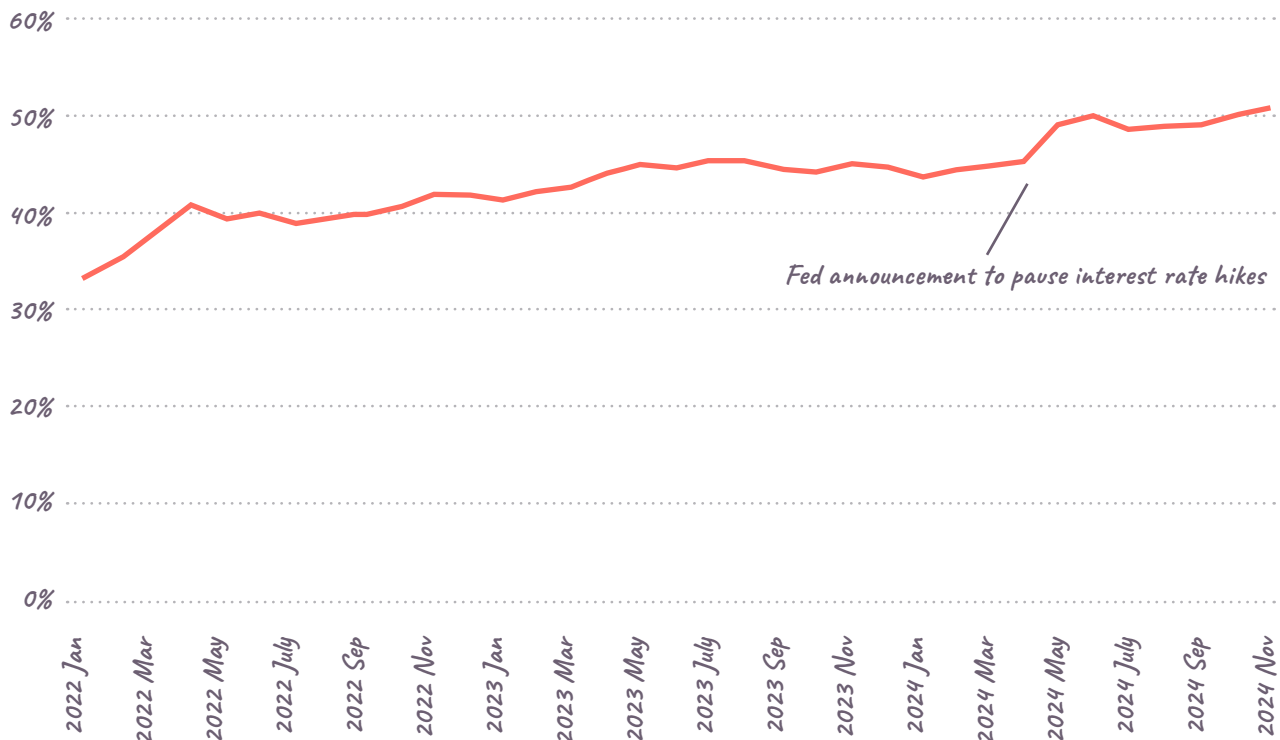
Deputy data reveals a direct link between economic recovery and shift worker sentiment. Following the announcement of interest rate policy changes, the share of shift workers reporting they felt 'Amazing' increased by 4%.

As interest rates declined, positive shift work sentiment rose steadily throughout 2024, reflecting broader economic optimism.

These findings highlight a strong correlation between worker sentiment, consumer confidence, and economic outlook—further reinforcing the role of economic stability in driving a more positive shift work experience.

Shift Pulse - Share of Workers Feeling 'Amazing'

Source: Deputy (2024)



Poly-Employment:

The Cost of Living & Multiple Job Roles

During the Cost of Living Crisis, many shift workers took on multiple job roles—a trend known as poly-employment—to cope with rising expenses. Deputy data shows that poly-employment rates surged due to inflationary pressures, peaking at 5.4% of all jobs in early 2024.

As inflation eased and living costs stabilized, poly-employment rates have declined slightly but remain historically high at 5.2%, suggesting that many workers are still relying on multiple jobs to manage ongoing financial pressures. A continued economic recovery is expected in 2025 to reduce poly-employment rates further.

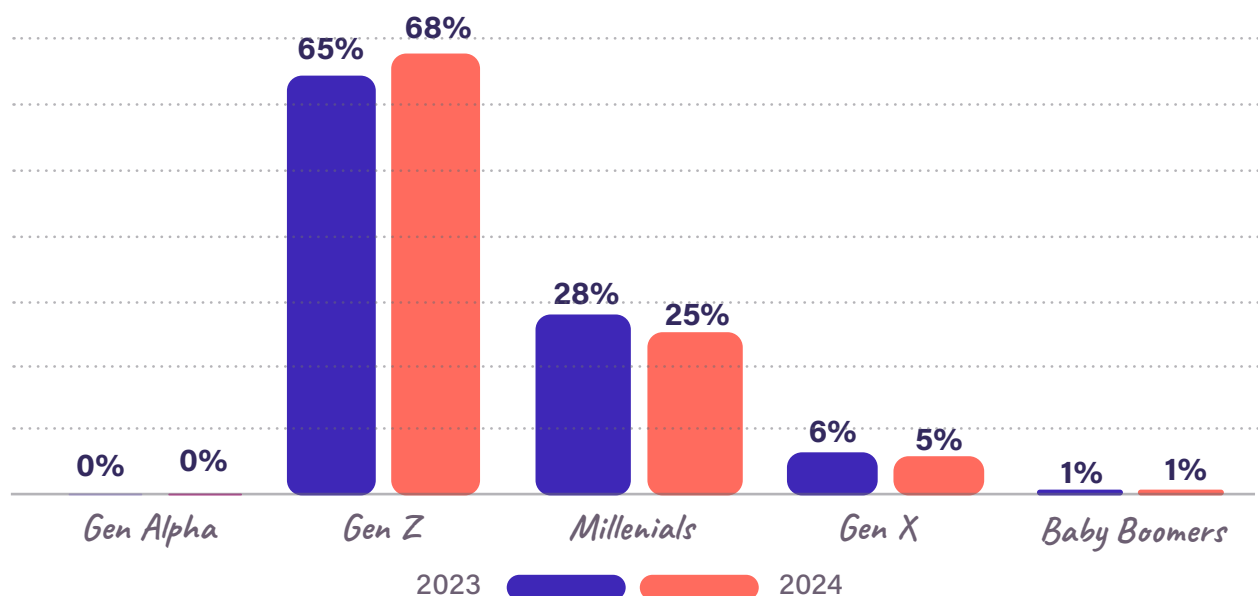
Deputy data identifies young women as the largest group balancing multiple jobs. 68% of poly-workers are Gen Z, followed by Millennials (25%). 58% of poly-workers are women, indicating that young working women are disproportionately affected by cost-of-living pressures, leading them to juggle multiple roles at higher rates than other demographics.

Hospitality remains the most common industry for poly-employment, with workers either holding multiple jobs within the sector or combining roles across industries. 42% of poly-workers hold multiple jobs within hospitality. 25% work in hospitality alongside another sector.

These insights suggest that hospitality's flexible work structures and high labor demand make it a central industry for workers managing multiple roles.

Share of Poly-Workers by Generation

Source: Deputy (2024) Comparing Jan-Oct 2023 and 2024 Years



City Trends:

Shift Work Recovery & Regional Growth

Economic headwinds in 2024 substantially impacted major metropolitan markets, with San Francisco, Chicago, and New York City experiencing declines in shift work employment early in the year.

However, as interest rate reductions provided economic relief, employment stabilized across these markets. In some cases—such as San Francisco—signs of growth recovery have emerged.

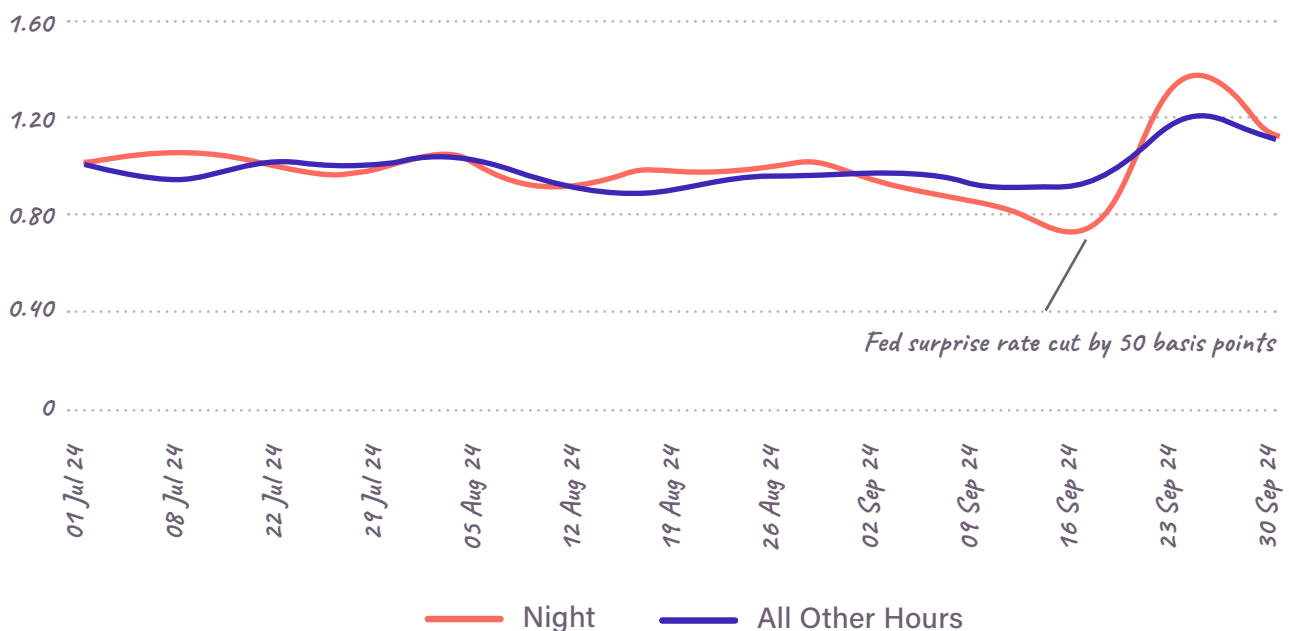
San Francisco's

Night-Time Economy Rebounds

Deputy data indicates that San Francisco's economy benefited significantly from interest rate relief efforts, particularly in night-time industries. Following the surprise Federal Reserve rate cut on September 23, Deputy data recorded a 40-person average increase in evening shift workers.

Notably, employment growth in nightlife is outpacing daytime recovery, aligning with San Francisco's broader efforts to revitalize its night-time economy.

Deputy Work Index - San Francisco by Shift Hours



Regional Growth:

The Rise of New Economic Hubs

Outside of traditional major city markets, growth cities such as Nashville, Austin, Dallas, and Houston have been driving national employment trends. These regions have benefited from:

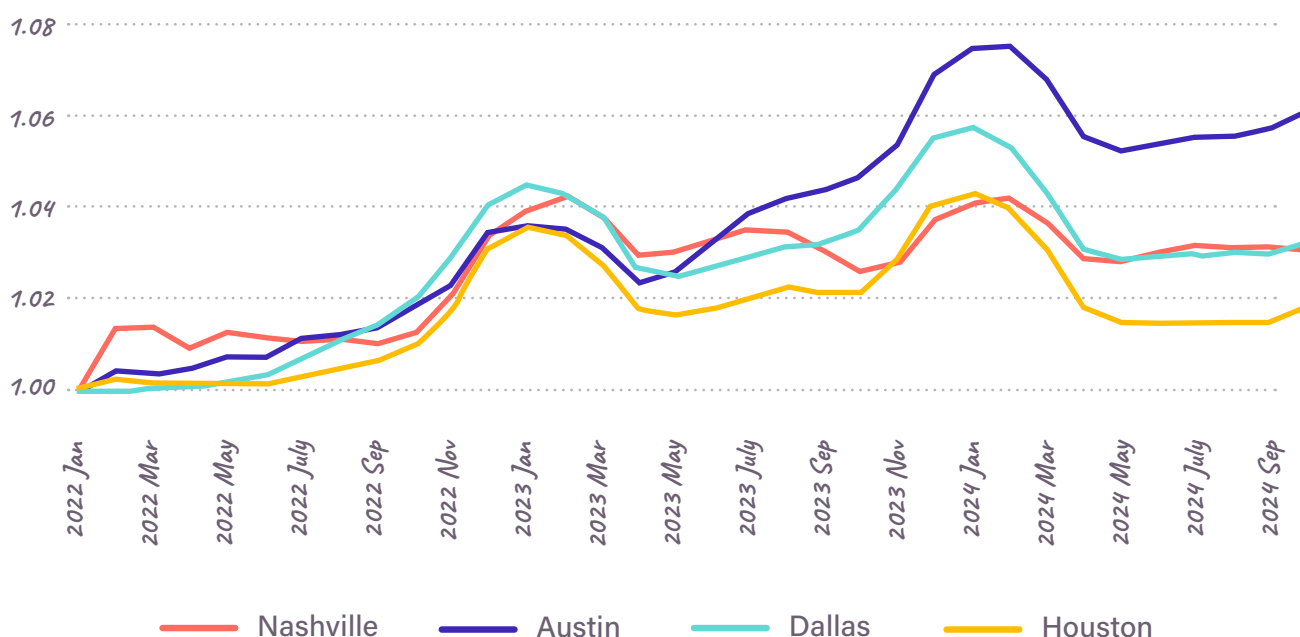
- Investment in energy sectors, including gas and renewable energy initiatives.
- The AI boom and expansion of data center hubs.
- Migration of tech businesses and workers shifting economic power away from the coasts.

These trends are expected to continue—and potentially accelerate—under new federal policies that leverage national defense initiatives to expand these industries.

If economic growth and government support remain strong over the medium term, these emerging shift work hubs could rival established coastal markets. By mid-2040, Texas is projected to surpass California as the largest shift work market in the U.S. Dallas is set to overtake Chicago as the third-largest metropolitan market in the country.

This geographic shift in employment trends signals a major rebalancing of the shift work economy, with Southern and Midwestern cities gaining influence over historically dominant coastal hubs.

Deputy Job Index by Growth Cities



Economic

Outlook & Policy Risks for 2025

Under business-as-usual scenarios, inflation and interest rates are projected to continue easing into 2025, supporting a sustained recovery in consumer sentiment and spending patterns.

One of the biggest beneficiaries of this economic rebound is expected to be the retail sector, as households regain confidence in purchasing larger-ticket and luxury items—categories that had been largely paused due to financial uncertainty. This recovery is also anticipated to boost employment demand in major coastal cities, particularly San Francisco, where economic relief measures and policy support are expected to accelerate growth.

San Francisco: Positioned for Recovery

San Francisco is expected to be a key beneficiary of economic recovery trends, bolstered by federal investment in technology and defense contracts under the Trump administration. Additionally, declining borrowing costs are expected to improve venture capital (VC) funding opportunities, further fueling AI sector growth.

At the local level, San Francisco's economic development initiatives will also play a role in expanding employment opportunities. The night-time economy is poised for further growth through city-led programs such as night markets and entertainment-focused business incentives, broadening the base of shift work employment well into 2025 and beyond.

Policy Risks: The Impact of Tariffs & Trade Disruptions

Despite these optimistic recovery patterns, the U.S. economy remains vulnerable to policy shocks, particularly in the form of tariff policies and trade tensions.

Import tariffs—or even the threat of new tariffs—pose a significant risk to U.S. economic growth. While tariffs are expected to incentivize re-shoring of manufacturing jobs, they could also result in higher consumer prices, reducing overall spending power and dampening shift worker demand in non-manufacturing industries.

If household spending slows, retail and hospitality shift work employment could stagnate or decline, counteracting the broader economic recovery trends.

Long-term job loss is a key concern—previous economic studies indicate that the continuation of Trump-Biden tariff policies could result in a net loss of nearly 142,000 jobs.



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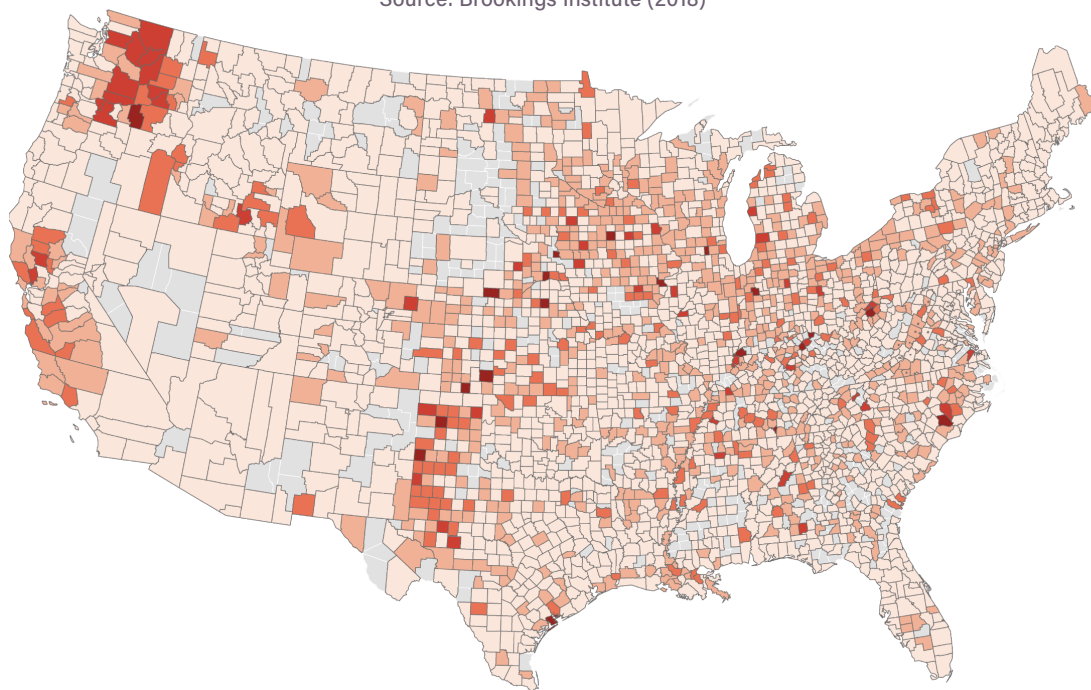
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US County Vulnerability to Foreign Tariffs

Source: Brookings Institute (2018)



The U.S. economy's reliance on imported goods also makes it susceptible to retaliatory foreign tariffs, which could further increase consumer prices and soften demand for shift work jobs in key urban economies. Historical trade policy impacts suggest that major coastal cities—such as San Francisco, New York, and Los Angeles—would bear the brunt of these economic pressures, potentially stalling their recovery trajectories.

City-Led Strategies: Navigating Economic Risks

In response to these risks, major U.S. cities are expected to engage in “city diplomacy” efforts—leveraging international partnerships to stimulate trade, promote economic resilience, and attract global investment. Key initiatives include:

- Climate cooperation and sustainability agreements with international regions.
- Expanding tourism and travel agreements, particularly through initiatives tied to night-time economies and urban revitalization.
- Leveraging major global events to stimulate economic activity and international engagement.

Upcoming high-profile events such as the 2026 FIFA World Cup (Seattle) and the 2028 Summer Olympics (Los Angeles) will serve as critical catalysts for economic recovery and international travel, reinforcing major U.S. cities as global economic hubs despite ongoing policy uncertainties.



The Future of Shift Work: **Resilient, Expanding, and Shaped by Technology**

Over the long term, most U.S. employment growth is expected to come from shift work industries. A key factor driving this trend is that many shift work roles are resistant to automation.

While AI and technology have the potential to replace some jobs, most shift work roles are inherently human-centered—meaning they require a human to deliver the service or product (whether it's a surgeon or a sommelier). Instead of replacing these roles, technology is expected to enhance them, creating new job opportunities, particularly in healthcare and hospitality.

Deputy survey data reflects this sentiment, with 63% of shift workers expressing a positive outlook on automation and AI—suggesting that workers see technology as an enabler rather than a threat.

Technology & the Creation of New Shift Work Jobs

As technology reshapes the labor market, it is expected to drive demand for new types of shift work roles, particularly in:

Personalized At-Home Services

As wealthier households increase spending on healthcare, aged care, personal services, and private hospitality (e.g., personal chefs), demand for independent shift workers and contractors will rise—allowing workers to service clients directly without traditional business intermediaries.

Retail Logistics & Hybrid Commerce

The blending of online and physical retail is redefining the sector. Back-end logistics jobs are now increasingly considered part of the retail workforce, expanding opportunities in fulfillment and last-mile delivery.

The Evolution of Gig Work into Permanent Micro-Shifts

Regulation and worker sentiment are shifting toward transforming gig jobs into stable micro-shifts, ensuring better protections and predictable income for workers.



Closing the Female Work Gap: **A \$2.1 Trillion Opportunity**

Beyond creating new jobs, shift work employment has the potential to unlock significant economic value—particularly by closing the female workforce participation gap.

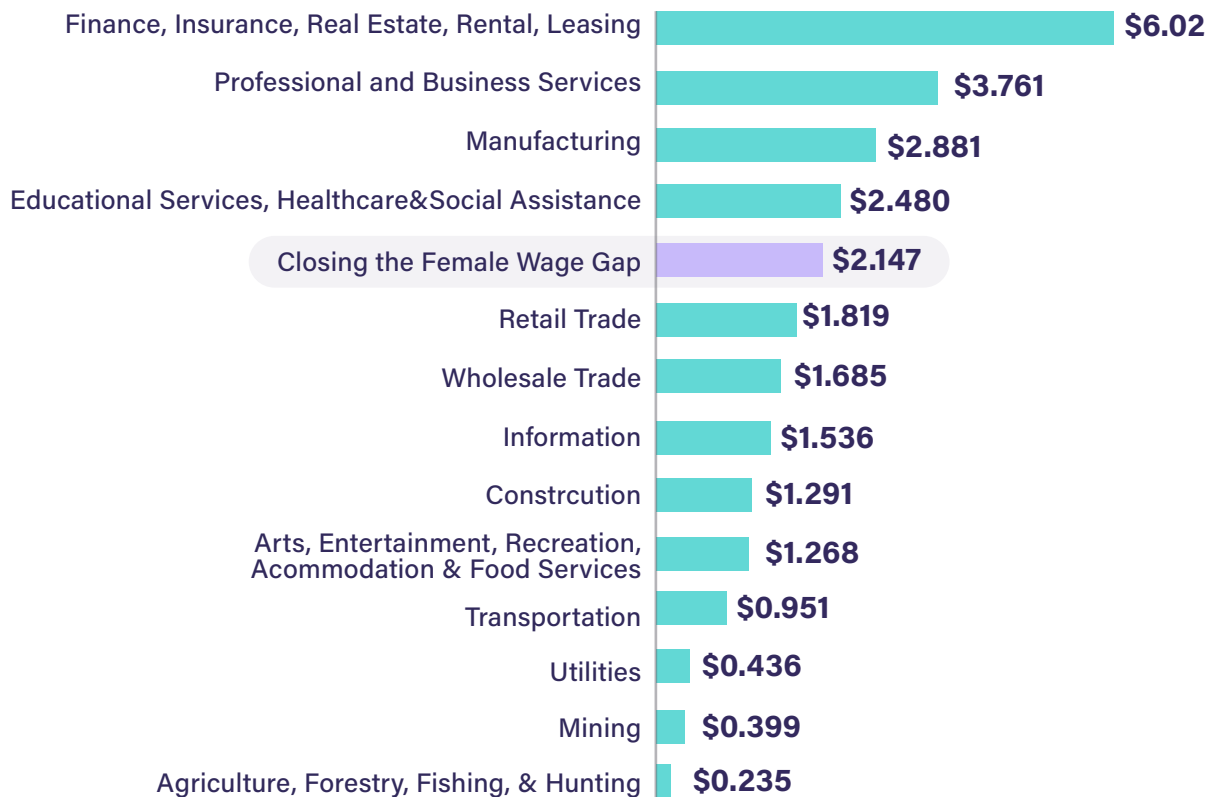
Increasing women's participation in the labor market could contribute an additional \$2.147 trillion to the U.S. economy, making it equivalent to the fifth-largest industry in the country.

However, a lack of stable, flexible roles remains a major barrier for women, particularly working mothers. Due to less predictable scheduling, they are underrepresented in retail and hospitality.

Deputy survey data suggests that many shift workers believe regulation to improve job stability and flexibility would help address this issue.

US Industry Sectors Values 2024

Source: US Bureau of Economic Analysis (2022) economic modelling undertaken by Geografia (2024)



Regulatory Shifts:

The Push for Stability & Flexibility

The growing demand for stability and flexibility is driving policy changes across multiple industries, including gig work. Increasing concerns over fairness in gig work environments—even among consumers—are leading to discussions about transforming vulnerable contract roles into more stable micro-shift positions, which is why we will start to see the emergence of micro-shifts.

AI's Role in the Future of Shift Work

Technology is expected to be crucial in shaping emerging micro-shift jobs, enhancing accessibility and efficiency through AI-Powered Job Matching. Automated job application processes will help time-poor candidates enter the labor market more easily. AI-driven platforms will instantly connect workers with shift opportunities, streamlining employment pathways. Labor markets often struggle to match workers with the right opportunities. AI-powered individualized job-matching algorithms could significantly improve efficiency, benefiting both workers and businesses.

Rise of Micro-Shifts & Who They Benefit

Deputy data reveals patterns in micro-shift employment, even within existing occupations:

- Gen Alpha and Baby Boomers have the shortest average shift lengths, suggesting an opportunity to tap into this emerging workforce.
- Poly-workers (particularly young women) are already balancing multiple jobs, demonstrating demand for flexible, short-hour shifts.
- Caregivers (working mothers, grandparents, etc.) who hesitate to enter the workforce could return if stable, flexible micro-shift roles were more widely available.

The U.S. labor market is fundamentally transforming, with shift work industries leading future employment growth. Driven by technology, regulatory changes, and shifting worker expectations, the next decade will see:

- AI to enhance—not replace—shift work jobs
- Micro-shifts become a viable, stable option
- The rise of hybrid retail and logistics roles
- Expanding opportunities for women

As businesses and policymakers adapt to these shifts, the future of work will increasingly be defined by stability, flexibility, and human-centric employment opportunities.



Subsector

Retail Industry



Supermarkets Remain Resilient, While Large-Ticket Retail Struggles

Unlike many other retail segments, supermarkets (food & beverage stores) remained steady in 2024, with employment levels largely unaffected by the broader economic downturn.

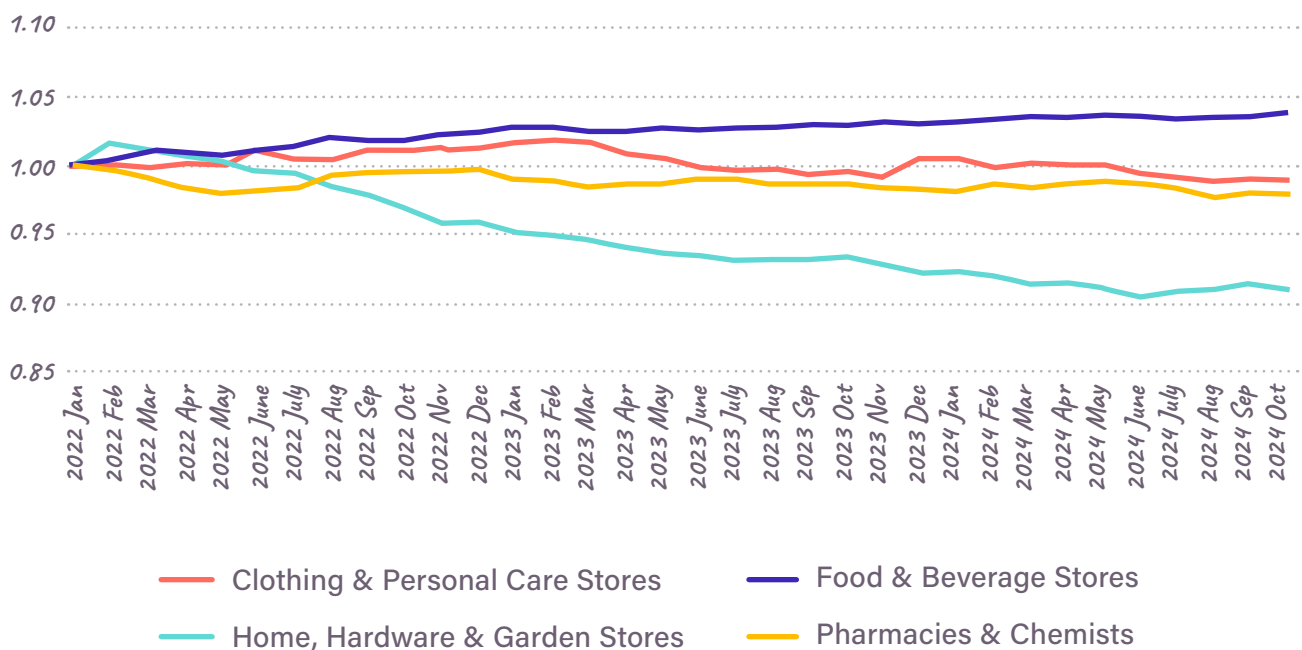
However, consumer caution led to a sharp pullback in spending on luxury and big-ticket items, resulting in employment declines across several key retail categories:

- Home, Hardware & Garden Stores—experienced notable job losses, as consumers deferred home improvement projects.
- Clothing & Personal Care Stores—faced similar employment slowdowns, reflecting a shift toward budget-conscious spending habits.
- Even essential retail sectors saw modest employment declines, indicating that financial pressures influenced even everyday purchasing decisions.

As economic conditions improve and consumer sentiment rebounds, retail employment is expected to stabilize—though growth will increasingly be concentrated in digital commerce and logistics-driven roles rather than traditional storefront positions.

Deputy Job Index by Sector

Source: Indexed to Jan 2022 using data from the US Department of Labor (2024) and Deputy (2024)



Retail's Workforce Evolution:

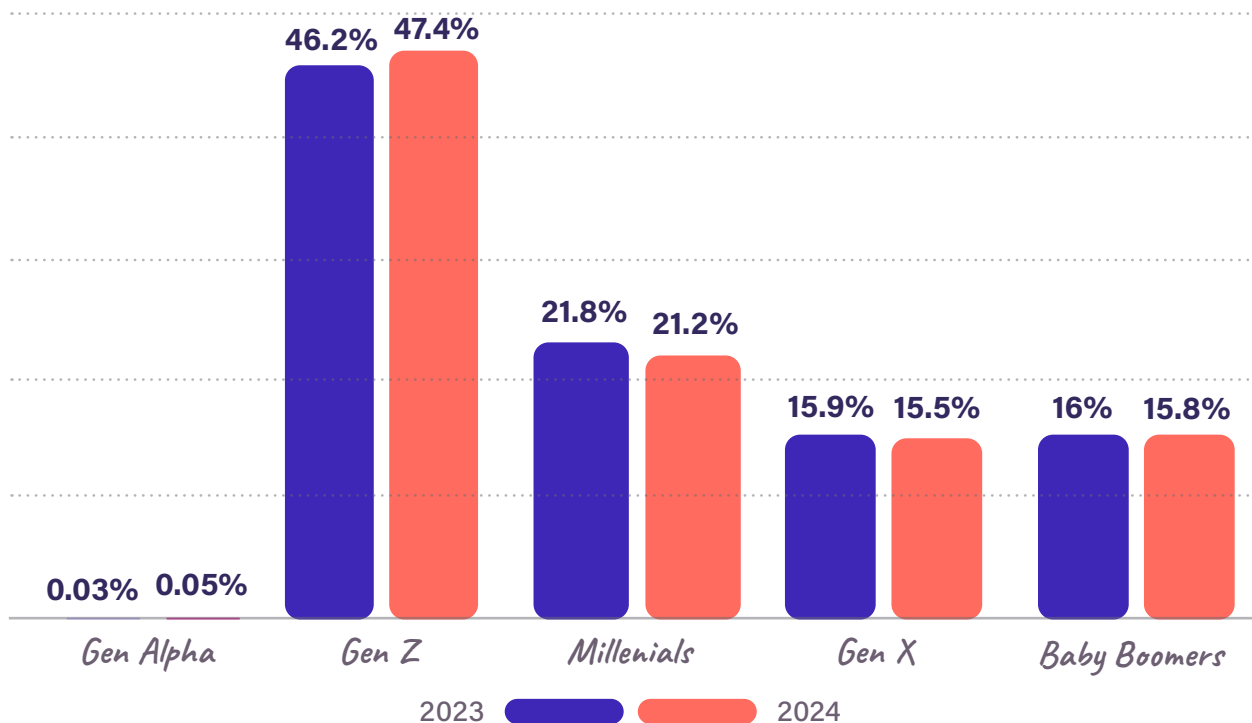
Gen Z Dominance & The Gen Alpha Rise

In 2024, Gen Z solidified its position as the dominant workforce in retail, accounting for 47.4% of all shift work hours. This continued generational shift came at the expense of Millennials, Gen X, and Baby Boomers, whose share of retail employment steadily declined.

Meanwhile, Gen Alpha's presence in the shift work economy grew. After first entering the workforce in 2023, this emerging generation is expected to see substantial workforce participation increases over the next three years as more individuals age out of school and into employment.

Share of Poly-Workers by Generation

Source: Deputy (2024) Comparing Jan-Oct 2023 and 2024 Years



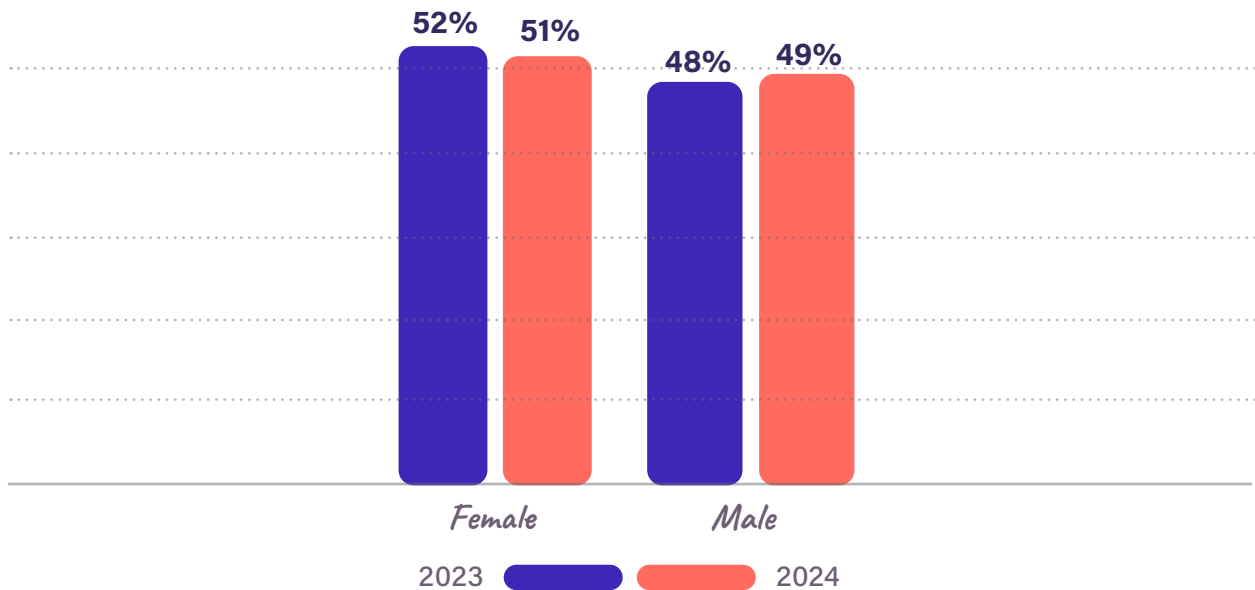
Gender Balance in Retail: Stability Amid Economic Shifts

Women continue to make up the majority of shift workers in retail, and economic headwinds in 2024 did not significantly impact their employment share. Women represented 51% of shift work hours in retail, maintaining near-equal workforce participation with men.

This stability in gender representation highlights retail's role as an accessible employment sector, even during periods of economic uncertainty.

Share of Shift Work by Gender and Year

Source: Deputy (2024) Comparing Jan-Oct 2023 and 2024 Years



Retail Wages & Worker Sentiment: The Retention Challenge

In 2024, retail workers earned an average timesheet pay of \$120, reflecting a 3.5% increase from the previous year. However, this was the lowest wage growth among all shift work industries, contributing to higher worker turnover intentions.

Deputy survey data reveals that 20% of retail workers are actively looking to resign—whether to seek employment in another company or industry, or to leave the workforce entirely.



The Wage-Sentiment Connection: A Key to Retention

Deputy's HR and Shift Pulse data highlight a direct correlation between wage increases and positive worker sentiment in retail. For every \$1 increase in hourly wages, workers were 1.6x more likely to report a positive sentiment after completing a shift.

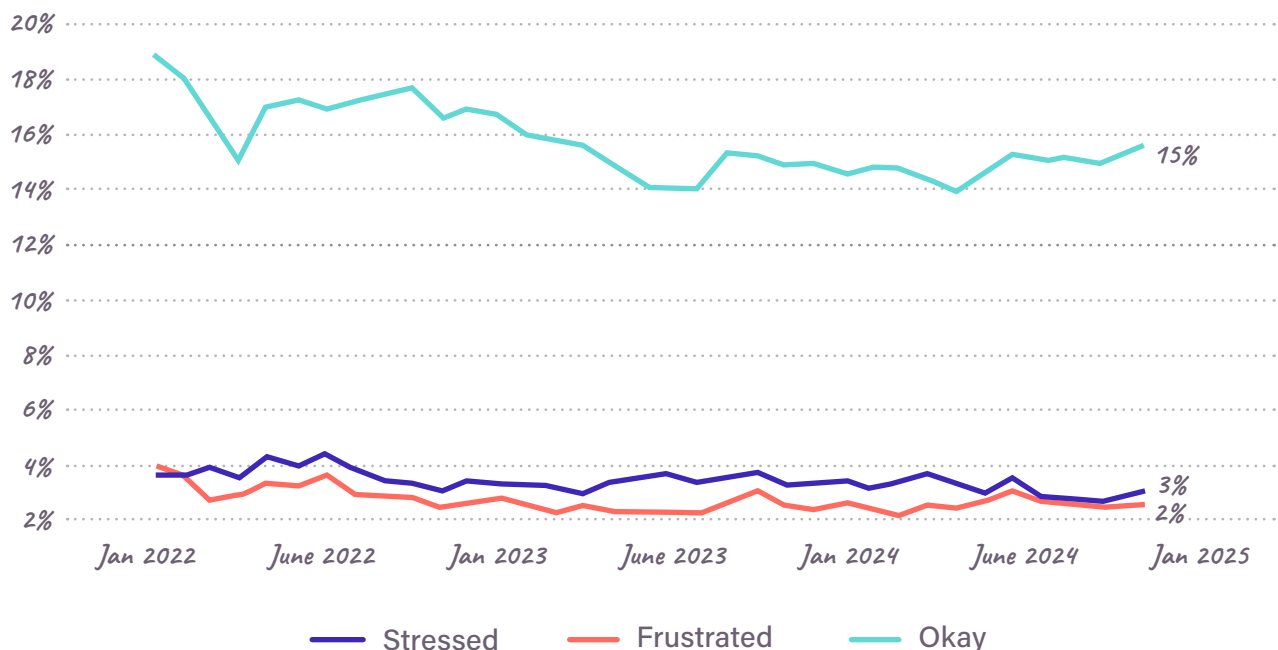
This strong connection suggests that ongoing cost-of-living concerns drive worker attitudes, making wage increases a powerful tool for improving sentiment and retention.

Shift Worker Sentiment: Improving but Still a Concern

Deputy's Shift Pulse data aligns with these findings, identifying that 20% of retail shift workers still report feeling "Stressed," "Frustrated," or just "Okay" about their work.

While negative sentiment levels in retail have been gradually improving, this still represents a significant portion of the workforce at risk of leaving their roles. Addressing wages and work conditions will be essential for improving retail worker retention into 2025.

Worker Sentiment Trends in Retail

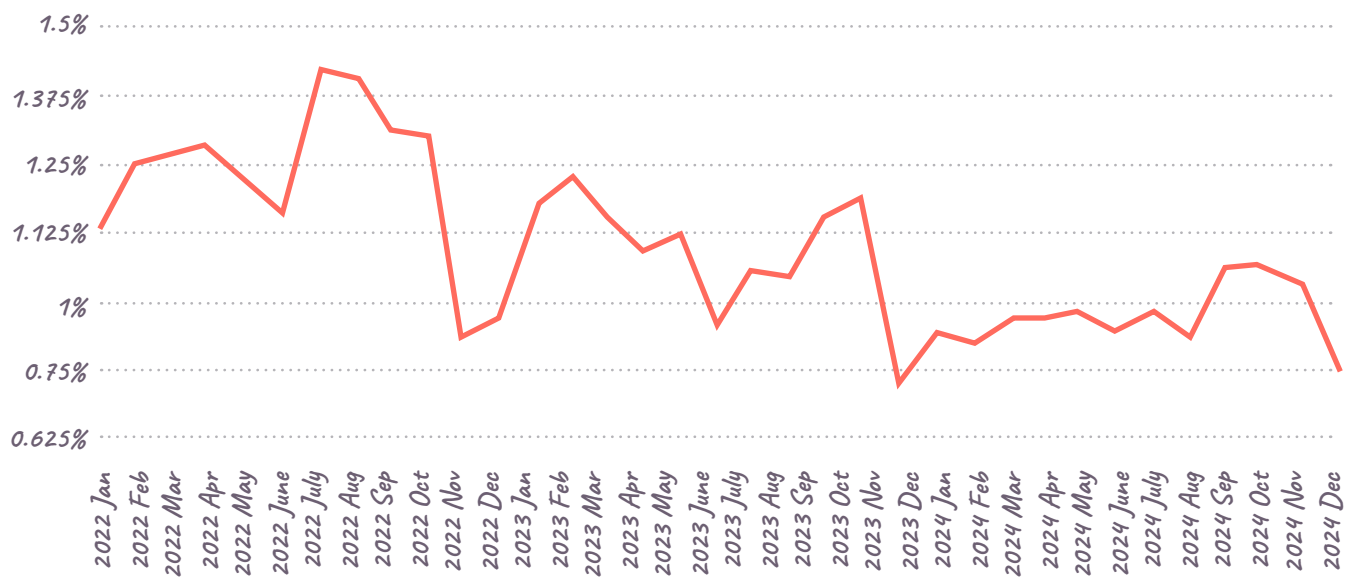


Hiring Trends & Poly-Employment

Hiring rates declined across all industries, including retail, during the Cost of Living Crisis, as businesses responded to economic uncertainty by pausing new worker onboarding. This aligns with broader business sentiment, where concerns over economic headwinds led to cautious hiring strategies.

However, with economic conditions expected to improve in 2025, these trends will likely reverse, leading to a renewed demand for workers across key industries.

Hiring Rates in Retail Sector



Poly-Employment:

A Response to Economic Pressures

Deputy data confirms that poly-employment peaked in 2024, as workers sought multiple income sources to offset rising costs. 26% of retail shift workers held two or more jobs at once. While this is lower than poly-employment rates in other industries, it still means that over a quarter of the retail workforce is engaged in multiple roles to make ends meet.

With wages and cost-of-living pressures remaining key concerns, compensation and job stability will continue to influence retail worker retention and hiring decisions throughout 2025.



Retail Employment: **A Tale of Two Markets**

Economic headwinds in 2024 hit major city markets hard, with San Francisco, Chicago, and New York City all experiencing declines in retail shift work employment.

However, as interest rate reductions provided economic relief, these cities saw employment levels stabilize, with San Francisco showing early signs of recovery.

Among major metros, Los Angeles proved to be the most resilient, maintaining steady retail employment growth throughout 2024 despite broader economic pressures.

Growth Cities Lead the Retail Expansion

While traditional retail hubs struggled, growth markets outpaced both major cities and national employment trends in retail.

Cities such as Austin, Dallas, and Houston bucked the trend, seeing strong retail job growth despite national declines. These cities—along with states like Texas—continue to benefit from:

- Increased migration from major coastal cities, boosting local consumer demand.
- AI and digital technology infrastructure investments, driving new job creation.
- Renewable energy expansion, powering economic and population growth.

2025 Outlook: **Recovery with Risks**

Retail employment is expected to grow in 2025, fueled by easing inflation, allowing for Federal Reserve interest rate cuts, which will support consumer spending.

However, policy risks remain. Expansion of tariffs on foreign goods could trigger higher retail prices, reducing discretionary spending. Potential foreign economic retaliation could further disrupt supply chains, softening retail's recovery trajectory.

While economic conditions are improving, retail remains vulnerable to external policy shocks, making 2025 a pivotal year for the industry's long-term stability.



The Future of Retail Work: AI, Stability, and Policy Shifts

While the retail sector remains vulnerable to automation, AI technologies are more likely to enhance productivity than replace jobs. The blending of online and physical retail is driving a transformation in logistics, leading to the recognition of new retail logistics roles, encompassing both front-end and back-end retail functions.

As the digital economy continues to expand, many of these logistics roles will be increasingly recognized as core retail jobs, reshaping the industry's workforce structure.

The Stability & Flexibility Gap in Retail Employment

Despite these changes, retail has historically scored low in providing stable, flexible job opportunities. This is particularly evident in the underrepresentation of mothers in retail sales, which ranks among the lowest across all occupations.

Time constraints and unpredictable schedules make retail employment difficult for working mothers. A lack of stability and flexibility also limits access to retail jobs for many caregivers, further contributing to workforce gaps.

Fair Work Week Legislation

One increasingly popular policy mechanism to address these challenges is Fair Work Week (FWW) legislation, designed to provide greater scheduling predictability and worker protections.

While economic data on FWW laws remains limited, early findings suggest that the benefits outweigh potential risks.

Deputy's analysis of Los Angeles' 2023 Fair Work Week legislation in retail found:

- +14% increase in rostered hours, indicating more consistent work availability.
- -14% reduction in the gap between scheduled and actual worked hours, improving predictability.
- No negative impact on employment levels, alleviating concerns of job losses.

As more cities begin to recognize the economic benefits of FWW, an increasing number of regions are expected to adopt similar regulations—helping to create a more stable, flexible, and worker-friendly shift work environment in retail.



Subsector

Hospitality Industry



Hospitality: A Resilient Sector Poised for Continued Growth

The hospitality industry has proven to be one of the most resilient throughout the Cost of Living Crisis, with employment continuing to grow through 2023 and 2024, despite peak inflation and Federal Reserve interest rate hikes.

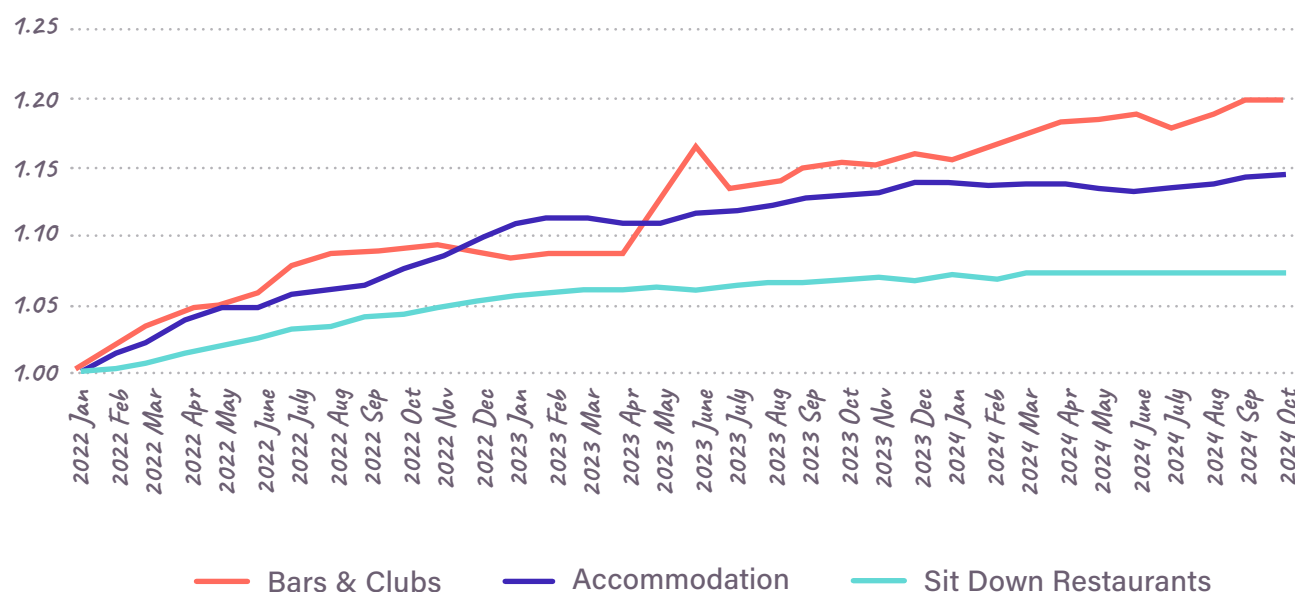
As the U.S. economy transitions into a recovery phase, hospitality employment is expected to expand further into 2025, reinforcing the industry's strong performance even amid economic pressures.

Deputy data confirms that all hospitality sectors saw employment growth in 2024, led by:

- Bars & Clubs (+4.1%)—driven by increased demand for nightlife experiences.
- Accommodation (+1.2%)—reflecting a shift toward domestic travel over international trips.
- Sit-Down Restaurants (+0.6%)—experiencing steady, albeit modest, growth.

Deputy Job Index by Sectors

Source: Indexed to Jan 2022 using data from the US Department of Labor (2024) and Deputy (2024)



Drivers of Hospitality's Resilience

Despite rising costs, the hospitality industry has remained strong, partly due to shifts in consumer spending habits. Many households scaled back on international travel but continued to spend on domestic tourism, dining, and local experiences. In major cities, demand for entertainment and hospitality services has surged, fueling employment growth in New York, San Francisco, and Los Angeles.

As economic conditions improve in 2025, these trends are expected to further strengthen, solidifying hospitality's position as a key driver of employment in the shift work economy.

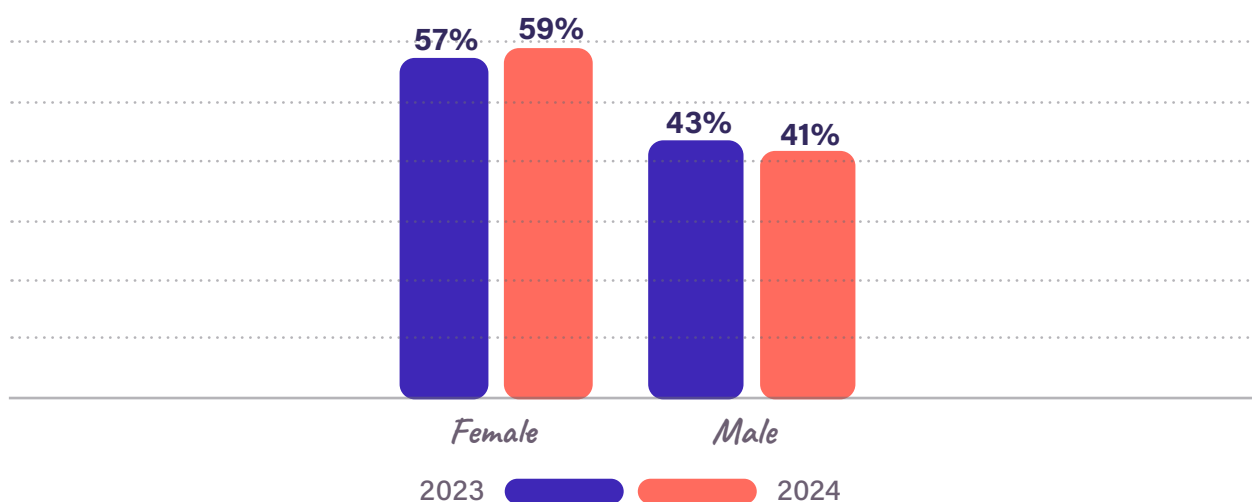
Hospitality's Workforce Evolution: Gen Z Dominance & The Rise of Gen Alpha

In 2024, Gen Z solidified its dominance in the hospitality industry, accounting for 82% of all shift work hours on Deputy's platform. This generational shift continues to reshape the workforce, as Millennials, Gen X, and Baby Boomers saw further declines in their employment share within the sector.

Additionally, 2024 marked the growing presence of Gen Alpha in hospitality, with the youngest generation entering the workforce primarily in the accommodation and sit-down restaurant sectors. As more members of Gen Alpha age into the labor market, their participation in shift work industries is expected to expand over the next few years.

Share of Shift Work by Gender and Year

Source: Deputy (2024) Comparing Jan-Oct 2023 and 2024 Years



Women in Hospitality: A Growing Share of the Workforce

Women continue to make up the majority of hospitality shift workers, and their representation grew last year. Female shift work hours increased from 57% to 59%, reflecting hospitality's role as a key employment sector for women. As hospitality employment continues to grow into 2025, these workforce trends will shape hiring, workplace policies, and the industry's future shift work dynamics.worker-friendly shift work environment in retail.

Wages, Worker Sentiment & Poly-Employment in Hospitality

Deputy HR data highlights modest wage growth in hospitality as employers sought to offset inflationary pressures from the Cost of Living Crisis. Hospitality workers earned an average timesheet pay of \$81 in 2024, marking a 6% increase from 2023 levels. Despite this increase, hospitality wages remain among the lowest compared to other industries, contributing to high turnover intentions – 22% of hospitality workers are actively looking to resign, seeking opportunities in a different company or industry, or exiting the workforce entirely.

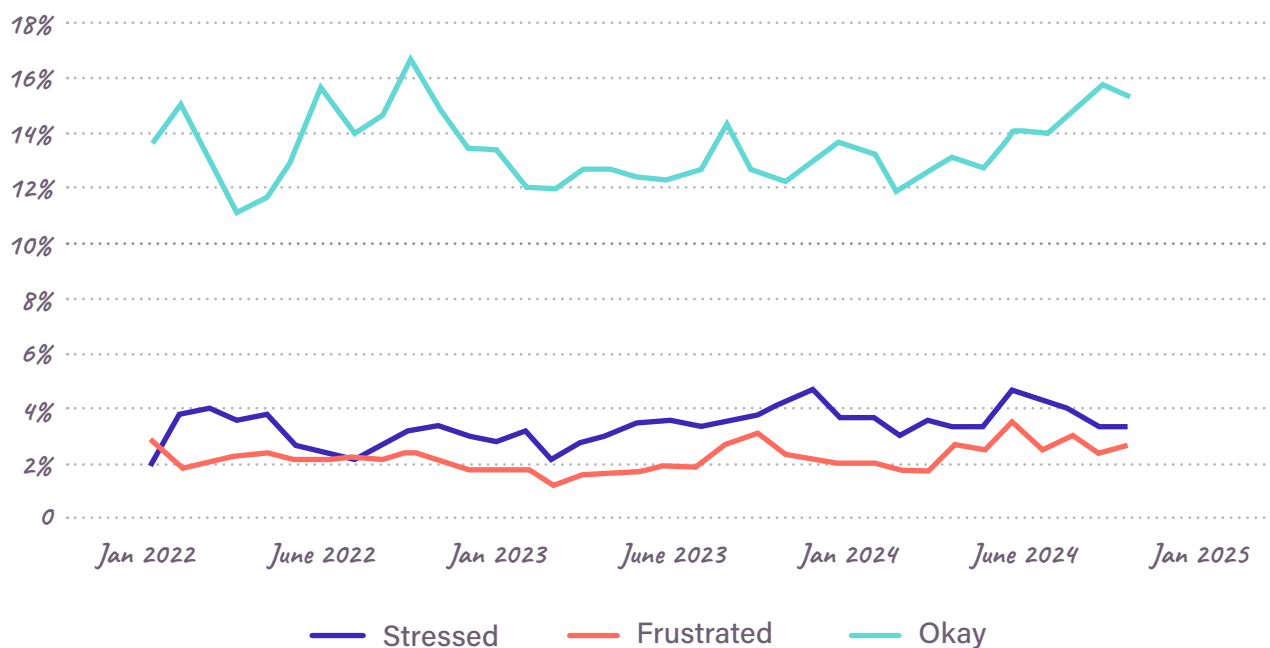
The Wage-Sentiment Link: Retention Challenges in Hospitality

Deputy HR and Shift Pulse data reveal a strong correlation between wage increases and worker sentiment in hospitality. For every \$1 increase in hourly wages, workers were 13% more likely to report positive sentiment after their shift. This reinforces how cost-of-living pressures weigh heavily on hospitality workers and how wage improvements can directly enhance job satisfaction and retention.

Deputy Shift Pulse data shows that 20% of hospitality workers report feeling “Stressed,” “Frustrated,” or just “Okay” after their shifts. This sentiment share has remained largely unchanged throughout the Cost of Living Crisis, indicating ongoing concerns about job stability and earnings.



Worker Sentiment Trends in Hospitality



Deputy data also highlights poly-employment as a key coping mechanism for hospitality workers; 28% of hospitality shift workers held two or more jobs simultaneously in 2024.

2025 Outlook:

Pay & Retention at the Forefront

While economic conditions are expected to improve, wages and job stability will remain key drivers of worker retention in hospitality. Employers will need to address compensation concerns and improve workplace conditions to reduce turnover and retain talent in one of the most dynamic shift work industries.



Hiring Trends & The Resurgence of the Night-Time Economy

Deputy data confirms that hiring rates declined across all industries during the Cost of Living Crisis, as businesses responded to economic uncertainty by pausing new worker onboarding. This trend aligns with broader business sentiment, where concerns over economic headwinds led many employers to delay hiring decisions.

However, with economic conditions expected to improve in 2025, hiring activity is projected to rebound, reversing these declines and driving renewed job growth across shift work industries.

Major Cities Leading the Recovery

Despite hiring slowdowns, several major cities saw employment growth in 2024, led by New York City—one of the hardest-hit global markets during the COVID-19 pandemic.

Increasing demand for night-time entertainment and hospitality services has fueled a resurgence of the night-time economy, contributing to steady employment growth in key urban centers.

Growth Cities Outpacing Major Markets

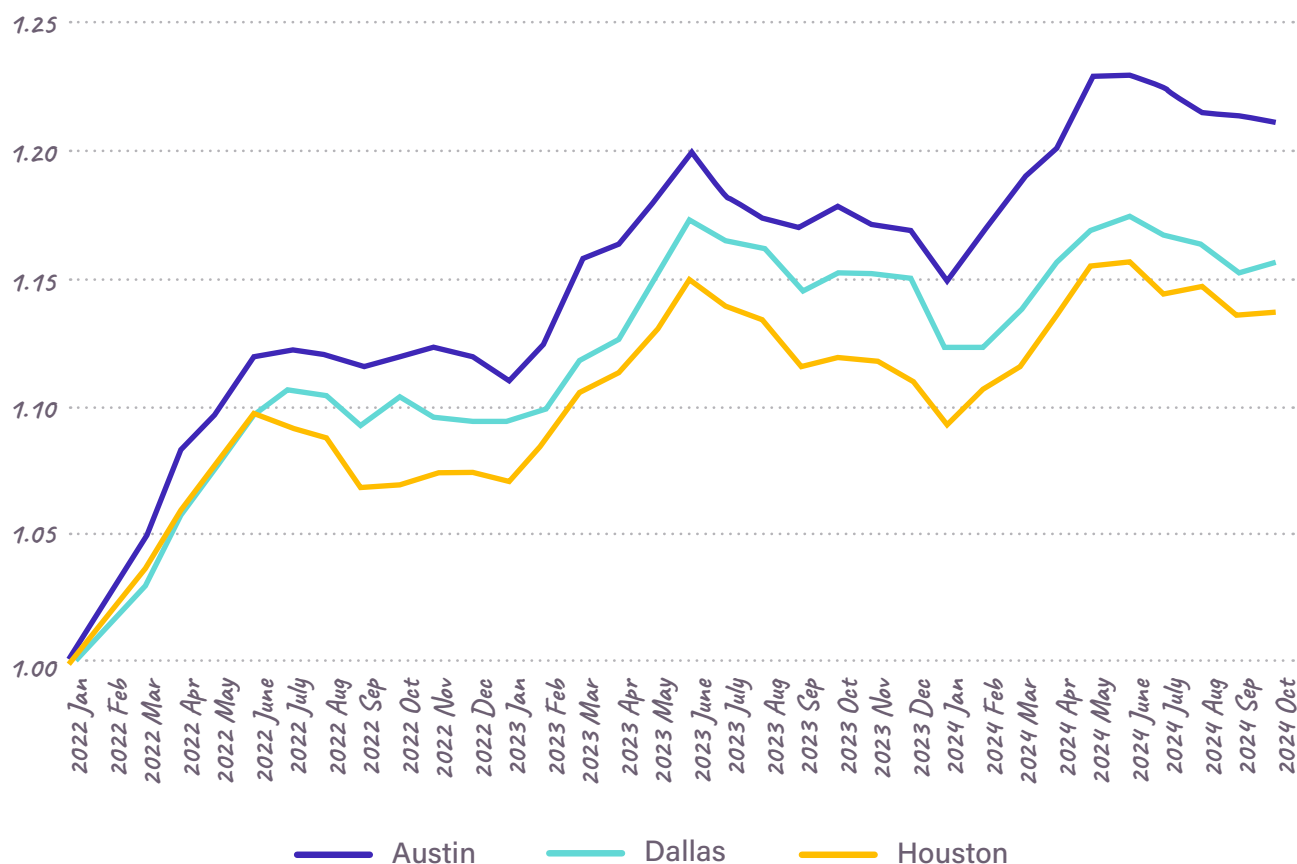
Alongside traditional economic hubs, emerging growth cities such as Austin, Dallas, and Houston have experienced strong hiring trends in 2024. These cities—along with states like Texas—have benefited from:

- Positive migration patterns, as businesses and workers relocate from coastal markets.
- The AI and digital technology boom driving new job creation and infrastructure investment.
- Expansion of renewable energy industries, fueling commerce and long-term population growth.

With these factors expected to continue into 2025, growth cities are positioned to lead national employment expansion, particularly in the hospitality, retail, and logistics sectors.



Deputy Job Index by Major Cities



Hospitality's 2025 Outlook: Growth, Policy Risks & Workforce Trends

The hospitality industry is poised for further growth in 2025, driven by expected Federal Reserve interest rate cuts and improving business and consumer confidence. However, like retail, the sector remains vulnerable to policy shocks, particularly expanding tariffs on foreign goods.

Potential foreign economic retaliation could lead to higher prices across industries, dampening consumer spending patterns, including hospitality-related expenditures.



Long-Term Growth & The Role of AI in Hospitality

Despite short-term risks, hospitality is expected to be a leading driver of employment growth in the U.S. economy over the long term.

AI and automation technologies are expected to enhance, rather than replace, roles in hospitality, improving efficiency while keeping human interaction central to service-oriented jobs.

Traditional hospitality roles—such as cooks and food preparation workers—will continue expanding alongside emerging home care roles.

A wealthier and aging U.S. population is expected to increase demand for home-based chefs and personal care aides, facilitating the rise of independent hospitality roles in the home setting.

Challenges in Stability & Flexibility for Hospitality Workers

While hospitality is a major employer, it ranks among the lowest industries in providing stable and flexible job structures. This is evident in the underrepresentation of working mothers in waitstaff and food service roles, compared to industries like nursing, which offer more predictable scheduling.

Deputy survey data indicates that many shift workers believe regulation could help improve job stability and flexibility, making the industry more accessible to a broader workforce. As economic conditions evolve, policies aimed at creating more structured, predictable work environments could play a critical role in shaping the future of hospitality employment.



Subsector

Healthcare Industry



Healthcare:

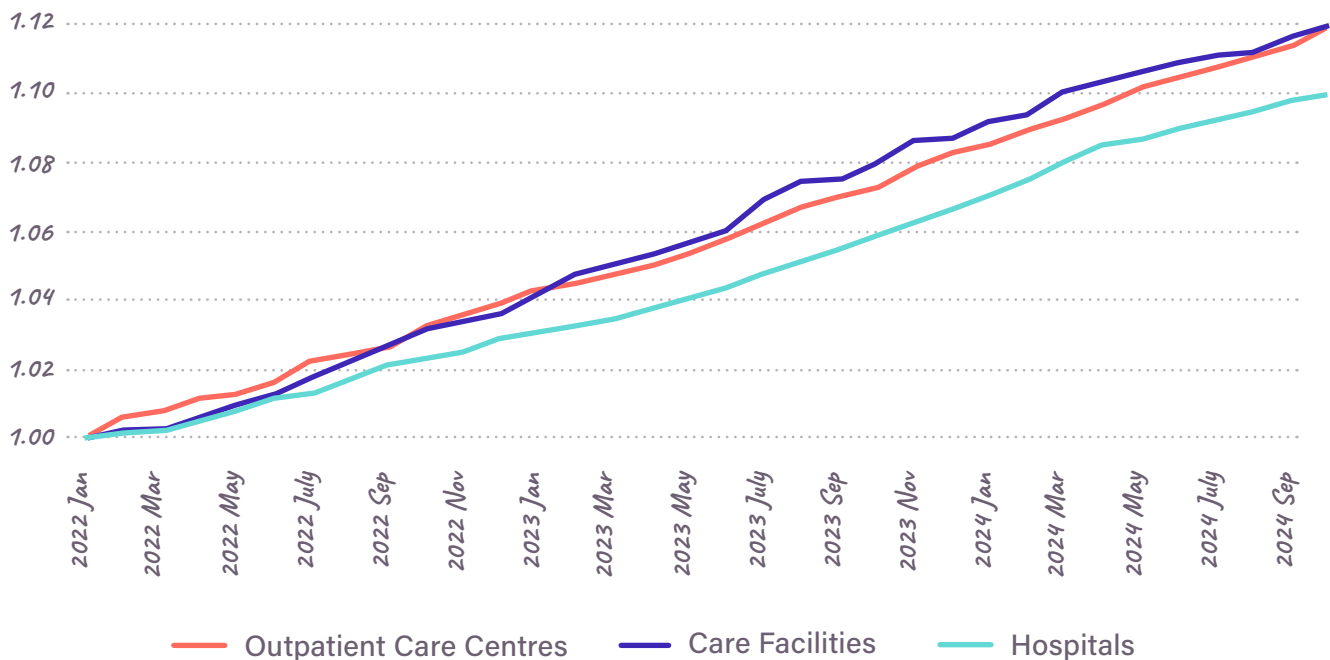
A Resilient and Expanding Industry

The healthcare industry experienced the highest levels of employment growth in 2024, continuing a steady expansion that began in 2023. Despite economic pressures, including peak inflation and Federal Reserve interest rate hikes, the sector remained largely unaffected by the Cost of Living Crisis. This resilience underscores healthcare's critical role in the economy, driven by consistent demand for medical services and an aging U.S. population requiring increasing care levels.

Long-term demographic trends indicate that demand for healthcare services will only continue to rise, reinforcing the industry's position as one of the most stable employment sectors in the country. Deputy data confirms that nearly all healthcare subsectors saw job growth in 2024, with the strongest gains observed in care facilities, including aged care and nursing homes. Outpatient care centers and hospitals also experienced steady increases in employment, reflecting ongoing demand for accessible medical treatment and specialized care. As the

Deputy Job Index by Sectors

Source: Indexed to Jan 2022 using data from the US Department of Labor (2024) and Deputy (2024)



A Generational Shift in Healthcare Employment

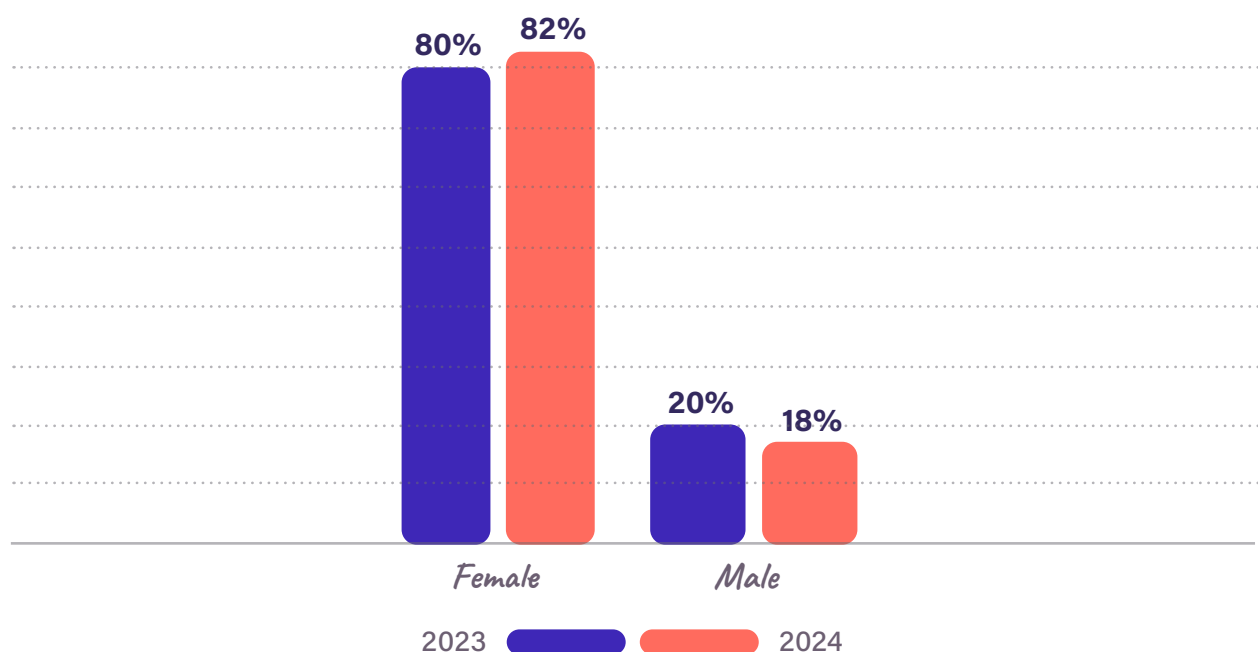
In 2024, Gen Z officially overtook Millennials to become the largest generation represented in shift work hours on Deputy's platform. This generational shift reflects a broader trend of younger workers entering the workforce while employment shares of older generations, including Millennials, Gen X, and Baby Boomers, continued to decline. As Gen Z solidifies its presence in healthcare, the workforce composition is transforming, with younger employees stepping into roles once dominated by previous generations.

The past year also marked the entry of Gen Alpha into the healthcare sector, primarily in clerical and administrative roles categorized as other healthcare. While still in the early stages of workforce participation, their presence signals the beginning of a long-term generational transition that will unfold over the next decade.

Women continue to make up the majority of shift workers in healthcare, and their representation grew even further in 2024. The share of female shift work hours increased from 80% to 82%, reinforcing the industry's strong reliance on women in a wide range of roles, from frontline patient care to administrative support. As healthcare employment expands, the industry will remain a leading employer for women and a key driver of workforce growth across all generations.

Share of Shift Work by Gender and Year

Source: Deputy (2024) Comparing Jan-Oct 2023 and 2024 Years



Healthcare Wages and Worker Sentiment: Stability Amid Pressures

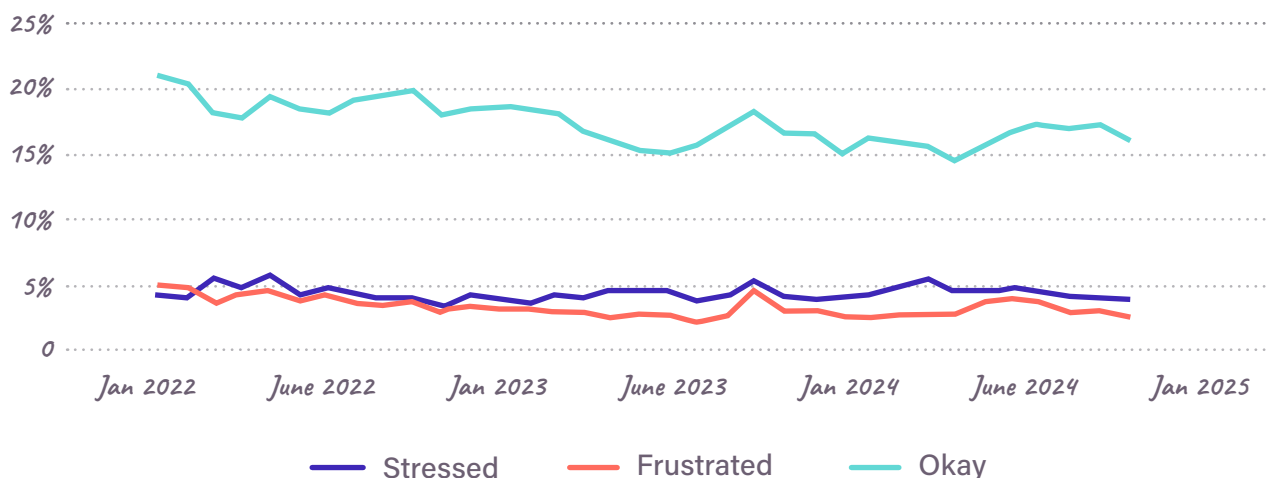
Deputy HR data reveals that healthcare workers earned the highest average timesheet pay across industries in 2024, with an average shift pay of \$152—a 3.9% increase compared to the previous year. These relatively higher wages correspond with lower job turnover intentions compared to other shift work industries, reinforcing healthcare's reputation as a stable employment sector.

Despite this stability, cost-of-living concerns and work pressures remain significant factors for many healthcare workers. Deputy survey data indicates that 15% of healthcare employees are considering leaving their current jobs to transition to a different company or industry or exit the workforce entirely. While this figure is lower than in other industries, it highlights healthcare workers' ongoing challenges in balancing wages, workload, and job satisfaction.

As economic conditions continue to improve into 2025, turnover intentions in healthcare are expected to decline further. This trend is reflected in Deputy Shift Pulse data, which shows a steady decrease in negative sentiment among healthcare shift workers. The data suggests that as inflationary pressures ease, workers are beginning to feel more financial and workplace stability.

Even so, 23% of healthcare shift workers still report feeling “Stressed,” “Frustrated,” or just “Okay” about their shifts. While this represents a gradual improvement compared to previous years, maintaining workforce morale and addressing ongoing pressures will be key priorities for employers looking to sustain long-term retention in the industry.

Worker Sentiment Trends in Healthcare



Hiring Slowdowns and the Rise of Poly-Employment in Healthcare

Hiring rates across all industries declined during the Cost of Living Crisis, as economic uncertainty led many businesses to pause onboarding new workers. This trend aligned with broader business sentiment, where employers exercised caution in expanding their workforce amid inflationary pressures and high interest rates.

However, with economic conditions set to improve in 2025, hiring is expected to rebound, reversing these declines and creating new job opportunities across industries, incl. healthcare.

Amid reduced hiring trends and fewer job openings, many healthcare workers have turned to poly-employment—holding multiple jobs simultaneously—to supplement their income. In 2024, poly-employment peaked in the U.S., with 28% of healthcare shift workers holding two or more jobs at once.

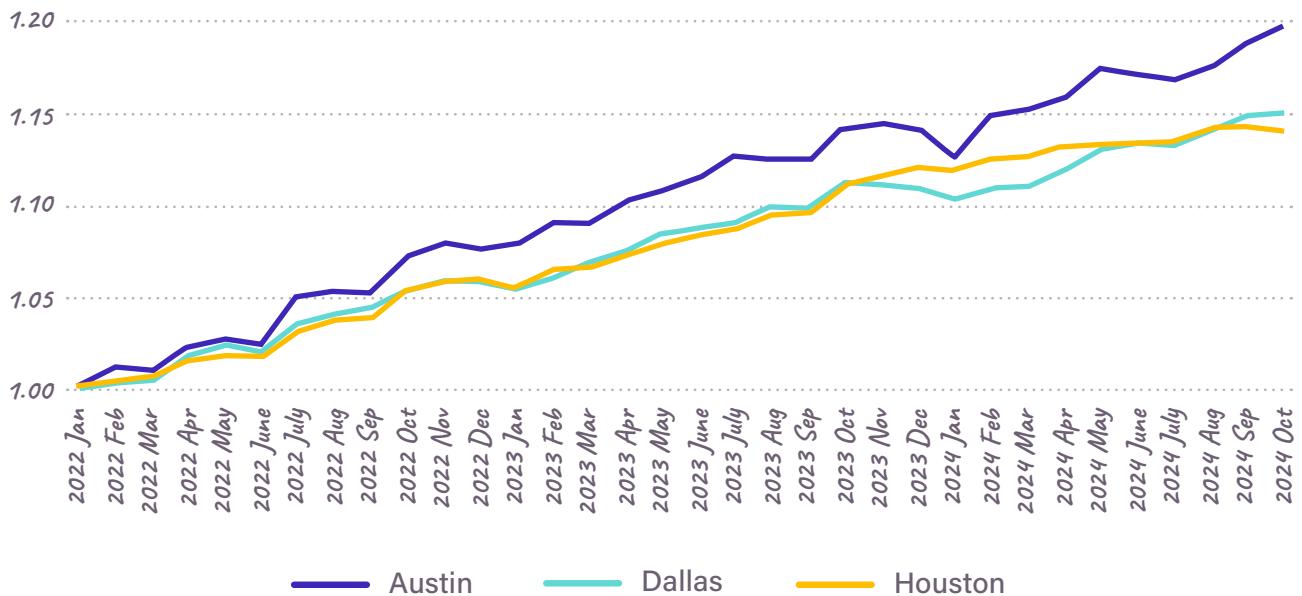
Deputy data indicates that healthcare workers most commonly take on secondary roles within another healthcare provider, reflecting the high demand for skilled professionals. Many healthcare workers transition into hospitality roles when seeking employment outside the industry, likely due to flexible scheduling and additional income opportunities. As economic stability returns, the reliance on poly-employment may ease, but for now, it remains a critical strategy for many workers managing financial pressures.

Healthcare Leading Employment Growth & Industry Transformation

Deputy data confirms that growth markets are driving national healthcare employment trends, with cities like Austin, Dallas, and Houston experiencing higher job growth in healthcare compared to major city peers in 2024. These cities, along with states like Texas, continue to benefit from a combination of positive migration patterns, a booming AI and digital technology infrastructure sector, and renewable energy investments—all contributing to expanding commerce, population growth, and increased demand for healthcare services.



Deputy Job Index by Major Cities



Over the long term, healthcare is expected to lead employment growth in the U.S. economy, bolstered by technological advancements and shifting demographic needs. The rise of AI and automation in healthcare is anticipated to enhance rather than replace workers, improving efficiency while maintaining the industry's human-centered nature. With the increasing adoption of AI technologies, there are high expectations that both the quality of healthcare services and overall quality of life will improve, particularly in diagnostics, administrative support, and patient care coordination.

As the wealthier and aging U.S. population grows, demand for home-based care services is expected to rise, creating new opportunities for visiting nurses, doctors, and personal care aides. Additionally, the rising costs of traditional aged care facilities are expected to drive demand for 'aging-in-place' solutions, allowing seniors to remain in their homes longer with greater access to in-home healthcare professionals.

Healthcare also stands out as the industry offering the highest levels of stable and flexible job opportunities, making it one of the most accommodating sectors for working mothers and caregivers. This is evident in the high representation of women in roles such as nursing and health service management, where predictable scheduling and shift planning provide greater work-life balance. The structured approach to rostering and shift coordination in healthcare is a model for other shift work industries, demonstrating how stability and flexibility can be improved to enhance worker participation and retention.



Subsector

Services Industry



Resilience in the Services Industry Amid Economic Pressures

The industry demonstrated strong resilience throughout the Cost of Living Crisis, with steady employment levels despite peak inflation and Federal Reserve interest rate hikes. Deputy data shows that the industry continued to expand through 2023 and 2024, reflecting its ability to withstand economic headwinds and adapt to shifting consumer and labor market demands.

Like healthcare, the growing and aging U.S. population is expected to sustain long-term demand for shift work jobs in the sector. As the need for support-based roles, customer service, and personal care services increases, the industry is well-positioned to drive continued employment growth into the medium and long-term future.

Despite some sector-wide employment declines, female shift workers experienced notable job gains in specific areas of the industry. Call centers and care facilities both saw a 4% increase in female shift work hours, highlighting the growing demand for administrative and support-based roles in an evolving labor market. As economic recovery progresses, these trends are expected to shape the workforce further, reinforcing the industry's role as a key provider of employment opportunities across multiple demographics.

Shift Stability and Wage Growth in the Services Industry

Deputy HR data reveals a declining trend in roster changes relative to shifts worked in key industries such as healthcare, hospitality, and retail. This suggests that advancements in workforce planning, enabled by technology, are reducing last-minute scheduling disruptions. As a result, shift workers in these industries are experiencing greater job stability, which in turn supports higher retention rates.

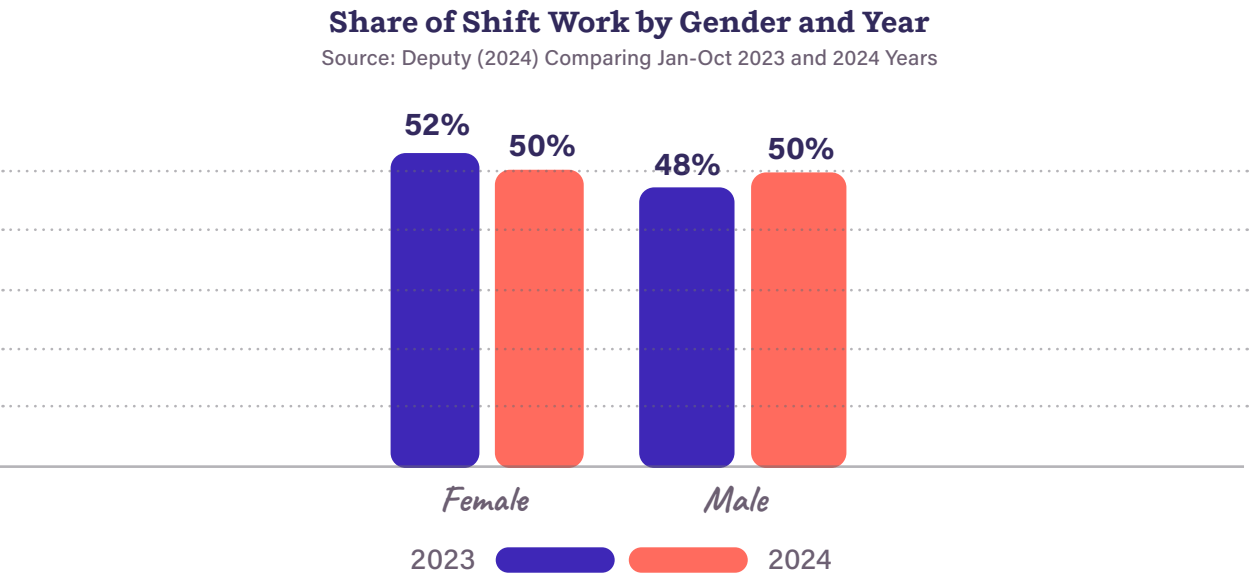
However, the industry stands out as an exception, with a sharp increase in roster changes recorded in the second half of 2024. This rise in scheduling volatility indicates that some sectors within are still grappling with workforce planning challenges, potentially impacting worker experience and retention.



Generational Shifts in Services Employment

In 2024, Gen Z solidified its position as the dominant working generation in the industry, accounting for 43.1% of all shift work hours. The presence of Millennials, Gen X, and Baby Boomers continued to decline, reflecting an industry-wide generational transition. Meanwhile, Gen Alpha entered the workforce, with the youngest generation emerging in professional services sectors, primarily in entry-level clerical and administrative roles. This marks the early stages of another long-term shift in workforce demographics.

Women continue to make up the majority of shift workers in the services industry, with their share of total shift work hours increasing from 57% to 59% in 2024. This growth underscores the industry's role as a key employer for female workers, particularly in customer service, care-based roles, and administrative positions.



Wage Growth and Its Impact on Worker Sentiment

Deputy HR data highlights that services industry workers saw an average timesheet pay of \$124 per shift in 2024, reflecting an 8.3% increase from the previous year—the highest wage growth recorded among shift work industries.

Deputy HR and Shift Pulse data further reveal a strong correlation between wage increases and positive worker sentiment in the services sector. For every \$1 increase in hourly wages, workers were 1.5 times more likely to report positive feelings about their shifts. This trend indicates that cost-of-living pressures are a major driver of worker sentiment, with wages playing a key role in shaping employee satisfaction. As wages continue to rise, higher pay may be crucial in improving worker retention within the services industry heading into 2025.

Hiring Trends and 2025 Outlook

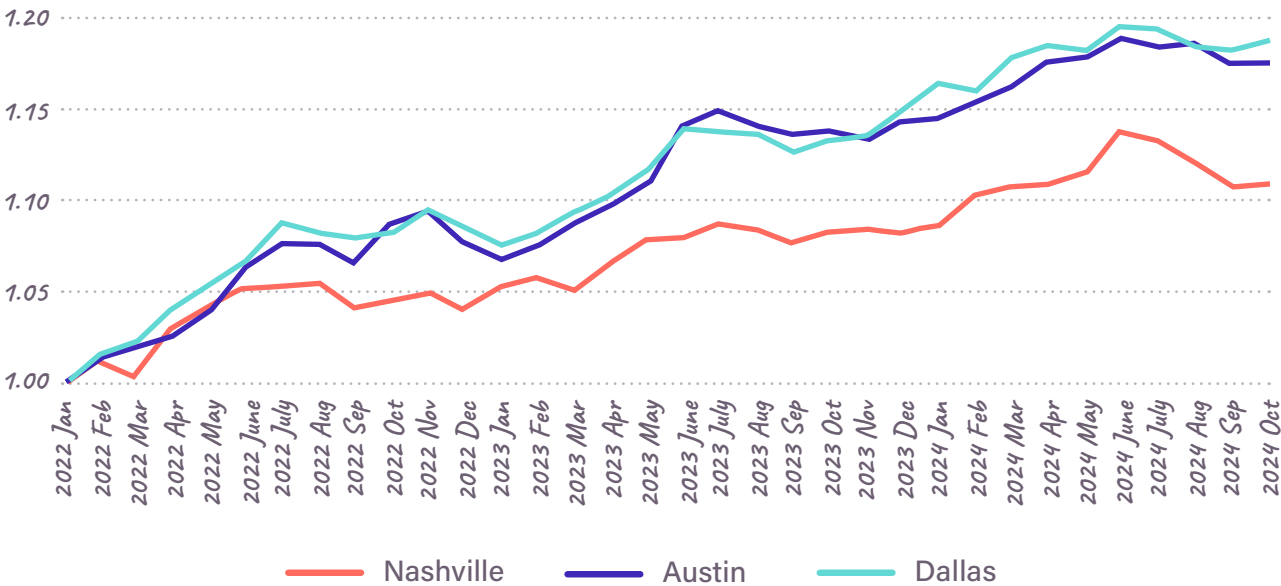
Like other industries, the services sector saw hiring rates decline throughout the Cost of Living Crisis as businesses responded to economic uncertainty by scaling back new hires. This trend aligns with broader concerns about economic headwinds, which led many companies to pause workforce expansion efforts. As the economic environment stabilizes in 2025, hiring rates are expected to recover, reversing previous declines and creating new job opportunities across the shift work economy. For the services industry, this shift may help alleviate scheduling pressures, stabilize workforce availability, and improve overall job satisfaction in the year ahead.

Services Industry Growth: Major Cities & AI Integration

As the U.S. economy stabilized in 2024, major city markets began to see employment growth stabilize, with some regions, such as San Francisco, showing early signs of recovery. The combination of interest rate reductions and economic relief measures helped major metropolitan areas regain hiring momentum, signaling a shift toward post-crisis workforce expansion.

While major cities rebounded, growth markets emerged as the primary drivers of national employment trends in the services sector. Cities like Austin, Dallas, and Houston experienced strong employment growth in services throughout 2024, outpacing the hiring patterns in larger coastal markets. These cities, alongside states like Texas, benefited from positive migration trends, a surge in AI and digital technology investments, and the expansion of renewable energy industries, all of which contributed to stronger labor demand and population growth.

Deputy Job Index by Growth Cities



AI and Automation:

Enhancing, Not Replacing, Services Jobs

Over the long term, the services sector is expected to lead employment growth in the U.S. economy, with AI and automation technologies playing a critical role in improving efficiency and job quality rather than replacing workers. The integration of AI in administrative, scheduling, and customer-facing roles is set to streamline operations, reduce workloads, and enhance the overall employee experience.

These advancements are particularly relevant in healthcare-related services, where AI-driven tools will help optimize home-based care, improve patient coordination, and support independent service providers. With greater adoption of AI technologies, the quality of healthcare and personal care services is expected to rise, reinforcing the industry's importance in meeting the needs of a growing and aging U.S. population.

The Aging Population and the Rise of Home-Based Services

Over the next decade, the increasing demand for home-based care will be one of the largest workforce drivers in the services industry. As the U.S. population ages, the need for home health aides, personal care providers, and administrative support workers is expected to surge. By 2032, the country is projected to add 804,600 new home health and personal care aide positions, making it the fastest-growing occupation in the economy.

Rising costs of institutionalized aged care will also fuel the expansion of "aging-in-place" solutions, allowing seniors to remain in their homes with access to visiting healthcare professionals and personal care aides. This trend creates new opportunities for independent workers who can bypass traditional institutions, such as hospitals and clinics, and provide services directly to clients.

However, as independent work models grow, managing administrative tasks such as timesheet rostering and scheduling remains challenging. Technology will play a pivotal role in supporting the rise of independent service sector jobs, providing tools that help workers navigate gig-style employment while maintaining financial stability and work-life balance. The continued expansion of digital scheduling and workforce management platforms will be key to sustaining employment growth in home-based and personal care services into the next decade.



Conclusion:

The Future of Shift Work in the U.S. Economy

The U.S. shift work economy demonstrated remarkable resilience through the Cost of Living Crisis, with key industries such as healthcare, hospitality, and services leading employment growth. While retail faced structural challenges and hiring slowed across many sectors, economic stabilization, interest rate reductions, and evolving workforce trends have set the stage for a stronger labor market in 2025 and beyond.

Generational shifts have reshaped the workforce, with Gen Z overtaking Millennials as the dominant working generation across multiple industries. The emergence of Gen Alpha in entry-level roles signals the beginning of another long-term labor market transition. Meanwhile, women continue to play a significant role in shift work employment, particularly in healthcare, services, and hospitality, where their representation has steadily increased.

Despite modest wage growth in several industries, cost-of-living pressures have continued to drive worker sentiment, retention challenges, and rising levels of poly-employment. AI and automation technologies are poised to enhance rather than replace shift work roles, offering new opportunities to improve job quality, scheduling predictability, and operational efficiency. The integration of AI in workforce management will be especially critical in healthcare and home-based care services, as the aging U.S. population fuels long-term demand for personal care aides, nurses, and home healthcare providers.

As the services sector leads employment expansion, the shift toward aging-in-place solutions and independent work models presents new workforce dynamics. Technology will be essential in supporting independent service providers, optimizing scheduling, and improving workforce stability, ensuring that shift workers have the tools and flexibility to navigate evolving job structures.

Looking ahead, 2025 is expected to bring new opportunities for job growth as economic conditions improve. However, policy risks, wage trends, and worker sentiment will continue shaping shift work employment's future. Businesses that embrace workforce technology, offer competitive wages, and implement scheduling stability measures will be best positioned to attract and retain shift workers in a labor market that is undergoing rapid transformation.

The shift work economy remains a pillar of the U.S. labor force. As new technologies, demographics, and economic trends continue to unfold, its ability to adapt and evolve will determine the future of work across essential industries nationwide.



Acknowledgements

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The Big Shift: How Gen Z is Rewriting the Rules of Hourly Work report

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one shift at a time**

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