

# THE HOSPITALITY INDUSTRY IN NEW YORK CITY

## A LABOR MARKET PROFILE PREPARED FOR THE NEW YORK CITY EMPLOYMENT AND TRAINING COALITION

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Hotels and restaurants comprise the major part of the hospitality industry in New York City. While many metropolitan hotels operate restaurants, the vast majority of the city's thousands of restaurants are independent businesses. New York's stand-alone restaurant and hotel industries differ substantially with respect to occupational structure, career paths, workforce characteristics, unionization and growth projections, requiring separate analysis in this report.

### THE HOTEL INDUSTRY

#### Industry overview

Vital to a world city attracting tens of millions of business and leisure travelers annually, the New York hotel industry ranks among the largest of any city in the world, offering more than 70,500 rooms as of late 2004. The industry is heavily concentrated in Manhattan, home to 368 of the city's 494 Accommodation establishments and about 90% of industry jobs.<sup>1</sup> A number of national chain hotels operate in the borough of Queens serving the airport trade and downtown Brooklyn boasts a new Marriott, but many of the remaining establishments scattered through the outer boroughs are small, independently-owned, low-priced, non-union operations. Reflecting Manhattan's concentration of large, expensive, unionized hotels, the average industry wage in that borough substantially exceeds that in the outer boroughs.

#### THE ACCOMMODATION INDUSTRY IN NEW YORK CITY, 2002

Borough	Number of Establishments	Average Annual Employment	Average Annual Wage (\$)
Bronx	26	335	19,854
Brooklyn	31	694	31,463
Manhattan	368	33,803	40,314
Queens	60	2,129	29,471
Staten Island	8	293	21,002
<b>New York City</b>	<b>493</b>	<b>37,254</b>	<b>39,193</b>

Source: New York State Department of Labor, ES-202 series

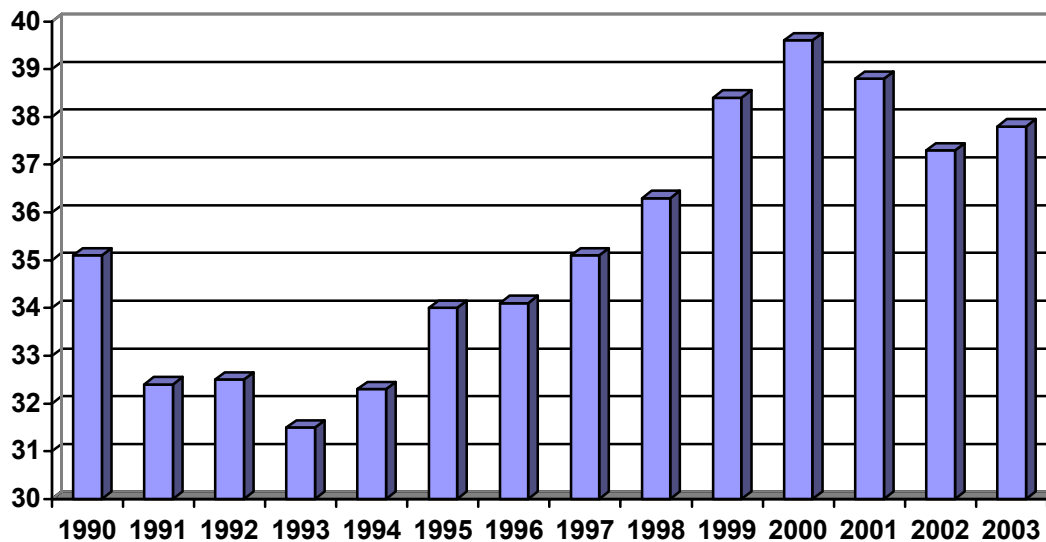
New York has hotels in every size and quality category but jobs are concentrated in Manhattan's large convention and luxury hotels, some independently owned and others operated as franchises of national chains (Hilton, Sheraton, Marriott, Crowne Plaza, Radisson, etc.). All of the city's major hotels are members of the Hotel Association of New York City (HANYC), a trade association primarily active in industry-wide labor negotiations. The New York City Hotel Trades Council, UNITE HERE, is the city's leading hotel union. An estimated 65% of all Traveler Accommodation employees in the New York metropolitan area are union members.

<sup>1</sup> The Accommodation industry comprises Traveler Accommodation (including hotels and motels) and other forms of accommodation, such as Rooming and Boarding Houses. In New York, hotels comprise by far the largest segment of the broader Accommodation sector. Depending on the data source used, this report presents information at the hotel, Traveler Accommodation or Accommodation level of industrial classification.

### Growth trends and outlook

The hotel industry in New York, as elsewhere, is highly cyclical. Both business and leisure demand for hotel rooms tends to move with the domestic business cycle, growing when output, income and employment are rising and falling when the national economy slips into recession. Although the domestic leisure market accounts for about 87% of all visitors to the city, the business and international leisure markets comprise a disproportionate share of overnight stays. Hence, movements in international currency exchange rates, political controversies (such as the United States war in Iraq), and security-based travel restrictions affecting international visitors (4.81 million in 2003) can also have significant effects on New York hotel demand and industrial employment.

**AVERAGE ANNUAL EMPLOYMENT IN TRAVELER ACCOMMODATION, NEW YORK CITY**



Source: New York State Department of Labor, Current Employment Statistics Survey

The graph shows two periods of employment decline, 1991-93 and 2001-2002, corresponding to the two most recent national recessions. Between the 1993 trough and 2000 peak, employment grew at a very rapid rate of 26%. While recovering since the 2001-2002 downturn, hotel employment has not yet reached its 2000 peak. Nevertheless, hotels have performed well in a generally sluggish metropolitan economy. Jobs in Traveler Accommodation grew 4.5% the first eight months of 2004 compared to the equivalent period in 2003.

The hotel industry in New York, as elsewhere, is also characterized by supply cycles, that is, periods of inadequate room supply followed by overbuilding and a glut of hotel rooms. The phenomenon, also evident in office building, is due primarily to the long gap between the initial decision to invest in a hotel project and completion of construction. The delayed supply response to an increase in demand means too many new hotels can come on stream after demand has peaked. Construction then comes to a halt until demand catches up, inaugurating a new cycle.

Despite the inevitable cycles, the growth and employment outlook for New York's hotel industry is good. Tourism is growing worldwide as rising income in the industrialized and newly industrializing countries stimulates demand. The number of leisure visitors to the city grew 9% in 2003 compared to 2002 while business visitors rose 5% and international visitors declined

5%. New York continues to have great cachet for both domestic and international visitors and the city is the top United States destination for the last group. Development of the New York City Convention Corridor--a proposal to expand the existing Jacob K. Javits Convention Center and develop a major new sports, convention center and hotel complex--will capture more of the business convention trade should the plan (backed by Governor George Pataki and Mayor Michael Bloomberg) reach fruition.

Demand has continued to surge in 2004, tightening the hotel occupancy rate (occupied rooms divided by total available rooms) to 81% during the first eight months of 2004 compared to 73% during the same period the previous year.<sup>2</sup> Both rates are well above the 67% rate reported nationally in September 2004 and show a rapid rise to full capacity. Predictably, the hotel building boom is well underway. The city's tourism agency reports that twenty-five new or renovated hotels have opened since June 2002 or are under development, bringing more than 5,700 rooms on stream. The establishments range from trendy boutique houses downtown (the 42-room Solita Soho Clarion) to big midtown convention facilities (the 863-room Westin New York at Times Square).

### Workforce profile

Several characteristics of New York's hotel workforce stand out: it is overwhelmingly foreign born, almost 50% Hispanic, includes many high school dropouts and is heavily unionized.

#### CHARACTERISTICS OF NEW YORK'S HOTEL WORKFORCE

VARIABLE	PERCENTAGE OF INDUSTRY WORKERS
<b>Gender</b>	
Female	55
Male	45
<b>Age</b>	
18-29	17
30-54	68
55+	15
<b>Place of Birth</b>	
United States	28
Other	72
<b>Race/Ethnicity</b>	
Black	25
Black Non-Hispanic	17
White	59
White Non-Hispanic	20
Asian	15
Hispanic (of any race)	47
<b>Educational Attainment</b>	
Less than high school graduate	34
High school graduate	29
Some college (including associate's degree)	24
Bachelor's degree or higher	13
<b>Working Hours</b>	
Part-time (less than 35 hours per week)	13
Full-time	87
<b>Union Status</b>	
Union member	65

<sup>2</sup> The national convention of the Republican Party, held in New York in August, does not seem to have inflated the 2004 statistic, as the occupancy rate difference between years was even higher in preceding months.

Not union member	35
<b>Health Insurance Coverage</b>	
Employer/union coverage	65
No employer/union coverage	35

Source: U.S. Department of Labor, Bureau of Labor Statistics, Current Population Survey, combined Annual Social and Economics Supplements, 2000-2004. Data are for the New York Primary Statistical Metropolitan Area, comprising New York City and Putnam, Rockland and Westchester counties.

The Current Population Survey data show that China, the Dominican Republic, Colombia and Ecuador are leading source countries for the city's hotel labor force. Women comprise a majority of industry workers and blacks a quarter, about equal to the black share of the New York's population in 2000. Both Hispanics and Asians are over-represented in the hotel industry. About 65% of hotel workers are union members and an equivalent share enjoys employer or union-provided health insurance coverage.

### Jobs in the hotel industry

There are comparatively few industry-specific occupations (such as Hotel Desk Clerk) in the hotel industry and most employment is in jobs found in other industries. Since many hotels operate dining facilities, there is a particularly large overlap with the stand-alone restaurant industry. Excluding the restaurant and bar-related occupations (about a quarter of total employment that will be discussed in the restaurant industry section below), a national industry/occupation matrix identifies the major hotel occupations as follows.

#### LEADING OCCUPATIONS IN THE TRAVELER ACCOMMODATION INDUSTRY, UNITED STATES, 2003

Title	Industry Employment Share (percentage)
Maids and Housekeeping Cleaners	22.7
Hotel and Motel Desk Clerks	9.6
Maintenance and Repair Workers, General	3.1
Janitors and Cleaners	2.9
Laundry and Dry-Cleaning Workers	1.7
Security Guards	1.7
Lodging Managers	1.5
Baggage Porters and Bellhops	1.4
First-Line Supervisors of Housekeepers & Janitors	1.2

Source: U.S. Department of Labor, Bureau of Labor Statistics

Low-skilled occupations, requiring a high school education or less and minimal on-the-job training--housekeepers and janitors, laundry workers, security guards and bellhops--dominate the list. But the industry also employs large numbers of higher-skilled and better-paid desk clerks and maintenance and repair workers. These jobs usually require no more than a high school education but demand job-specific skills, such as basic computer and excellent communications skills for the former and a broad knowledge of carpentry, plumbing, electrical wiring, and heating ventilation and air conditioning for the latter. The labor-intensive hotel industry also employs a high proportion of first-line supervisors of specific groups of workers and managers of functional areas (lobby, restaurant, housekeeping, etc.). The first are usually promoted from the ranks and the second are typically hired with a bachelor's degree. Career ladders are limited because of the preponderance of employment in low-skilled jobs. Inadequate English language skills present an advancement obstacle to many immigrant women employed as Maids and Housekeeping Cleaners. Promotion of Hotel Desk Clerks to lower management positions is not infrequent.

Primarily due to the strong union presence, New York's hotel industry is a source of good jobs for low-skilled workers. In particular, benefits for unionized workers are superb. The HERE-HANYC employee benefit funds offer full health coverage; a network of fund-owned and operated ambulatory health clinics and pharmacies; dental, vision and pharmacy benefits; pension and 401(k) plans; skills upgrading and new job training; and college scholarships for members' children.

While not high, mean wages are decent for low-skilled occupations with a high concentration in the hotel industry, such as Maids and Housekeeping Cleaners and Baggage Porters and Bellhops, according to state labor department data. It should be noted that these averages are calculated across industries and hence may differ from the average wages paid to hotel workers. Given the industry's high rate of unionization, hotel wages are likely to lie at the upper end of the distribution (the "experienced" column in the table below).

#### WAGES FOR LEADING HOTEL OCCUPATIONS, 2003

Title	Annual Wages (\$)			
	Mean	Median	Entry*	Experienced**
Maids & Housekeeping Cleaners	29,430	30,490	19,210	34,540
Hotel & Motel Desk Clerks	34,640	35,580	27,710	38,100
Maintenance & Repair Workers	35,520	34,670	20,710	42,930
Janitors & Cleaners	26,110	26,560	15,490	31,420
Security Guards	22,650	20,750	14,340	26,800
Lodging Managers	77,650	54,140	40,400	96,270
Baggage Porters & Bellhops	26,420	22,750	14,520	32,370
Suprv. of Housekeepers & Janitors	41,390	39,440	26,830	48,670

Source: New York State Department of Labor, Occupational Employment Statistics Survey. Wage data are from the 1999-2002 surveys and have been adjusted to fourth quarter 2003 levels using the Employment Cost Index.

\*Entry wage: average of the bottom third of wages in an occupation.

\*\*Experienced wage: average of the top two-thirds of wages in an occupation.

Employment projections for these occupations are mixed, but the state labor department's projections, like the wage estimates, are made across industries. As the hotel industry grows, job opportunities in all major occupations within the industry will grow. The Hotel Desk Clerk occupation is projected to be among the city's fastest-growing occupations during the 2000-2010 period as the number of jobs rises at a blistering 37% rate. The Maids and Housekeeping Cleaners title will count among the top occupations for net annual openings, two-thirds of which will replace workers leaving existing jobs. Nationally, there is high turnover in the hotel industry, but because of the strong union presence and excellent benefits enjoyed by the city's unionized workers, turnover is likely to be significantly lower in New York.

#### PROJECTED EMPLOYMENT GROWTH IN LEADING HOTEL OCCUPATIONS, 2000-2010

Title	Employment		Change	
	2000	2010	Level	Percent
Maids & Housekeeping Cleaners	57,450	64,730	7,280	12.7
Hotel & Motel Desk Clerks	2,250	3,090	840	37.3
Maintenance & Repair Workers	34,530	34,850	320	0.9
Janitors and Cleaners	98,000	108,800	10,800	11.0
Laundry & Dry-Cleaning Workers	7,030	7,450	420	6.0
Security Guards	69,670	84,250	14,580	20.9
Lodging Managers	680	740	60	8.8
Baggage Porters & Bellhops	3,790	4,250	460	12.1
Suprv. of Housekeepers & Janitors	7,420	8,380	960	12.9

Source: New York State Department of Labor, Occupational Employment Statistics Survey

### PROJECTED OPENINGS IN LEADING HOTEL OCCUPATIONS, 2000-2010

Title	Average Annual Openings		
	Total	Growth*	Replacement**
Maids & Housekeeping Cleaners	1,980	730	1,250
Hotel & Motel Desk Clerks	180	80	100
Maintenance & Repair Workers	480	30	450
Janitors and Cleaners	2,850	1,080	1,770
Laundry & Dry-Cleaning Workers	230	40	190
Security Guards	3,360	1,460	1,900
Lodging Managers***	--	--	--
Baggage Porters & Bellhops	180	50	130
Suprv. of Housekeepers & Janitors	300	100	200

Source: New York State Department of Labor, Occupational Employment Statistics Survey

\*\*"Growth" refers to openings resulting from growth of employment in the occupation.

\*\*\*"Replacement" refers to openings resulting from jobholders leaving the occupation (e.g., retiring or starting a job in a new occupation). Turnover, not shown here, includes openings from workers changing employers but continuing to work in the occupation.

\*\*\*Data are not available for this occupation.

### THE RESTAURANT INDUSTRY

#### Industry overview

Restaurants and bars are one of New York's largest industries, supplying almost 160,000 jobs in 2002. Like hotels, the industry is geographically concentrated in Manhattan, home to about half of the city's establishments and 63% of jobs. The average restaurant wage of \$19,870 is far below the average for all industries (\$59,461; a figure inflated by high earnings in financial services) and the Manhattan wage is 59% higher than the mean outer borough average, reflecting Manhattan's concentration of high-priced dining establishments.

#### THE FOOD SERVICES AND DRINKING PLACES INDUSTRY IN NEW YORK CITY, 2002

Borough	Number of Establishments	Average Annual Employment	Average Annual Wage (\$)
Bronx	1,010	9,853	13,948
Brooklyn	2,163	16,688	14,685
Manhattan	6,427	99,398	22,808
Queens	2,700	26,406	15,707
Staten Island	533	5,371	12,920
<b>New York City</b>	<b>12,833</b>	<b>157,716</b>	<b>19,870</b>

Source: New York State Department of Labor, ES-202 series

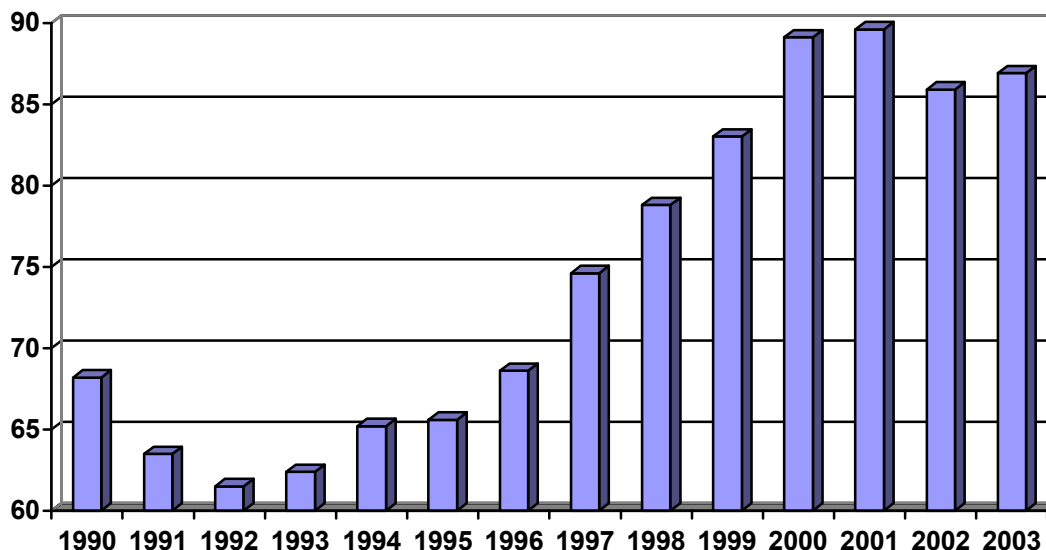
The city's restaurant industry is heterogeneous, running the gamut from full-service, fine dining establishments to small, mid-priced ethnic restaurants, national chain fast-food establishments, and myriad coffee bars, take-out restaurants, and other food-serving businesses. A basic industry sub-division is between Full-Service Restaurants (providing wait service for seated diners) and Limited-Service Eating Places, comprising fast-food restaurants, cafeterias, and snack and nonalcoholic beverage bars. Most of the city's restaurants are small: about 72% of establishments in 2000 had between one and nine employees and only 15% employed twenty or more. Many of these smaller establishments (including some fast-food chain franchises) are independently owned and operated. Some of the lucrative luxury establishments are owned by small groups of private investors. Ownership of multiple establishments is common. National full-service and fast-food chain franchises have proliferated in the city since the mid-1990's, partly in response to booming tourism.

UNITE HERE is the leading restaurant workers' union but its presence is largely limited to some of the city's luxury full-service restaurants (Oyster Bar, the Four Seasons, 21 Club) and the food service operations of other prominent institutions, such as airport terminals (often operated by specialist restaurant management firms). HERE Local 100 is known for its aggressive organizing but the large number, small size and dispersed ownership of establishments limits the industry's organizing potential. Fewer than ten percent of restaurant workers are union members, according to Saru Jayaraman of the Restaurant Opportunities Center of New York (ROC-NY). In an interesting experiment in parallel organizing, Local 100 helped set up and fund ROC-NY in late 2001 as a membership-based resource, training and advocacy center for unorganized restaurant workers.

**Growth trends and outlook**

As is true for hotels, employment in the city's stand-alone restaurants moves with the business cycle, rising in flush times and falling when recession reduces tourism and business travel. (New Yorkers seem more likely to shift their patronage to lower-priced establishments than give up their deeply ingrained habit of dining out.) But the industry shows a strong overall growth trend as the number of jobs in full-service restaurants has risen 41% from 1992 to 2003. Jobs are likely to recover to their 2001 peak of 89,600 in 2004. Medium term growth prospects for New York's restaurant industry are very good as tourism grows, income rises, and the culture of restaurant dining strengthens, especially among young adults.

**AVERAGE ANNUAL EMPLOYMENT IN FULL-SERVICE RESTAURANTS, NEW YORK CITY**



Source: New York State Department of Labor, Current Employment Statistics Survey

**Workforce profile**

The demographic profile of New York restaurant workers reveals a group that is mostly young, male, immigrant and poorly educated. Mexico, China and the Dominican Republic are among the leading source countries for hotel workers. Hispanics and Asians are heavily over-represented in the industry and blacks are substantially under-represented. Three-quarters of restaurant workers have a high school education or less, so restaurant workers as a group are substantially less educated than hotel workers. More than a third of industry workers work part

time. The CPS sample drew *no* union members, suggesting the rate of union representation is quite low. About 13% of the sample reported receiving health insurance coverage from a current or former employer or union.

**CHARACTERISTICS OF NEW YORK'S RESTAURANT WORKFORCE**

<b>VARIABLE</b>	<b>PERCENTAGE OF INDUSTRY WORKERS</b>
<b>Gender</b>	
Female	31
Male	69
<b>Age</b>	
16-29	42
30-54	53
55+	5
<b>Place of Birth</b>	
United States	27
Other	73
<b>Race/Ethnicity</b>	
Black	13
Black Non-Hispanic	9
White	59
White Non-Hispanic	18
Asian	28
Hispanic (of any race)	45
<b>Educational Attainment</b>	
Less than high school graduate	34
High school graduate	41
Some college (including associate's degree)	9
Bachelor's degree or higher	16
<b>Working Hours</b>	
Part-time (less than 35 hours per week)	25
Full-time	75
<b>Union Status*</b>	
Union member	<10
Not union member	>90
<b>Health Insurance Coverage</b>	
Employer/union coverage	13
No employer/union coverage	87

Source: U.S. Department of Labor, Bureau of Labor Statistics, Current Population Survey, combined Annual Social and Economics Supplements, 2000-2004. Data are for the New York Primary Statistical Metropolitan Area.

\*Estimated (see text) because of insufficient observations in the CPS data.

**Jobs in the restaurant industry**

The two principal industry divisions have somewhat different occupational profiles; for example, Limited-Service establishments employ a much smaller share of waiters and a much larger share of cashiers compared to Full-Service restaurants. Because the latter generally offers higher-quality jobs, this section addresses this sector exclusively. A national industry/occupation matrix identifies the major restaurant occupations as follows.

**LEADING OCCUPATIONS IN THE FULL-SERVICE RESTAURANT INDUSTRY, UNITED STATES, 2003**

<b>Title</b>	<b>Industry Employment Share (percentage)</b>
Waiters and Waitresses	36.6
Cooks, Restaurant	12.5

Dishwashers	6.9
Hosts and Hostesses, Restaurant	5.7
Dining Room Attendants	5.1
Food Preparation Workers	4.4
Bartenders	4.0
Suprv. of Food Prep. & Serving Workers	4.0
Food Service Managers	2.0
Chefs and Head Cooks	1.5

Source: U.S. Department of Labor, Bureau of Labor Statistics

Dishwashers are low-skilled, but skills for the other leading occupations are variable, generally rising with the quality of the restaurant. Wait staff, chefs and cooks at top-quality restaurants are highly skilled indeed and even Dining Room Attendants (buspersons) must give fleet and effectively discreet service. Educational attainment is relatively unimportant compared to personal qualities and the skills obtained from experience. Few career ladders are climbed through multiple occupations; more typically, workers advance by moving within their occupation to a better establishment.

Wages for wait staff and chefs/cooks are also highly variable, ranging from six-figure salaries at top-flight establishments to less than \$20,000 annually.

#### WAGES FOR LEADING FULL-SERVICE RESTAURANT OCCUPATIONS, 2003

Title	Annual Wages (\$)			
	Mean	Median	Entry*	Experienced**
Waiters and Waitresses***	23,900	--	--	--
Cooks, Restaurant	30,800	29,140	18,930	36,740
Dishwashers	16,340	14,120	12,680	18,160
Hosts & Hostesses, Restaurant	25,450	22,450	17,740	29,300
Dining Room Attendants	17,890	15,580	12,850	20,410
Food Preparation Workers	20,810	21,060	14,510	23,960
Bartenders***	22,370	--	--	--
Suprv., Food Prep. & Serving	31,440	30,320	17,770	38,280
Food Service Managers	55,000	49,950	30,240	67,390
Chefs and Head Cooks	46,840	41,840	24,380	58,070

Source: New York State Department of Labor, Occupational Employment Statistics Survey. Wage data are from the 1999-2002 surveys and have been adjusted to fourth quarter 2003 levels using the Employment Cost Index.

\*Entry wage: average of the bottom third of wages in an occupation.

\*\*Experienced wage: average of the top two-thirds of wages in an occupation.

\*\*\*NYS DOL does not publish wage data for these occupations. Mean OES data are from the Bureau of Labor Statistics and for the New York PMSA.

These occupational wage data are gathered across industries (including Limited-Service Eating Places, hotels, and stand-alone bars) and hence may differ somewhat from the averages paid to workers in the Full-Service Restaurant industry.

The state labor department's occupational employment projections forecast relatively rapid growth for Cooks, Restaurant and Waiters and Waitresses. Automation will displace some Dishwashers, but it is likely that the number of Dining Room Attendants in Full-Service Restaurants will grow, despite the negative projection for the occupation as a whole. Waiters and Waitresses and Food Preparation Workers are included among the twenty-five occupations expected to have the largest number of net annual openings during the 2000 to 2010 period. Turnover is high in all of the non-managerial occupations, partly due to low pay and few internal advancement opportunities.

### PROJECTED EMPLOYMENT GROWTH IN LEADING FULL-SERVICE RESTAURANT OCCUPATIONS, 2000-2010

Title	Employment		Change	
	2000	2010	Level	Percent
Waiters and Waitresses	38,830	45,510	6,680	17.2
Cooks, Restaurant	10,450	12,570	2,120	20.3
Dishwashers	11,690	11,040	-650	-5.6
Hosts & Hostesses, Restaurant	2,490	2,600	110	4.4
Dining Room Attendants	9,940	9,370	-570	-5.7
Food Preparation Workers	25,260	28,420	3,160	12.5
Bartenders	8,580	9,590	1,010	11.8
Suprv., Food Prep & Serv.	19,530	21,730	2,200	11.3
Food Service Managers	6,090	7,030	940	15.4
Chefs and Head Cooks	2,900	3,130	230	7.9

Source: New York State Department of Labor, Occupational Employment Statistics Survey

### PROJECTED OPENINGS IN LEADING FULL-SERVICE RESTAURANT OCCUPATIONS, 2000-2010

Title	Average Annual Openings		
	Total	Growth	Replacement
Waiters and Waitresses	2,850	670	2,180
Cooks, Restaurant	510	210	300
Dishwashers	440	0	440
Hosts & Hostesses, Restaurant	80	10	70
Dining Room Attendants	330	0	330
Food Preparation Workers	1,290	320	970
Bartenders	440	100	340
Suprv., Food Prep & Serv.	710	220	490
Food Service Managers	170	90	80
Chefs and Head Cooks	110	20	90

Source: New York State Department of Labor, Occupational Employment Statistics Survey

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