CADA 2024 NATIONAL WORKFORCE STUDY



















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No individual dealership data are disclosed or available. CADA assumes no liability for any use of the data in this National Workforce Study.

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I. Introduction



Dear Dealer Members,

I am thrilled to present to you the latest edition of the National Workforce Study, tailored to complement the ongoing trajectory of the automotive sector as we embark into 2024. This report is meticulously crafted to offer enhanced and strategic insights to dealer members navigating the evolving landscape of our industry.

The automotive industry continues its journey of adaptation and resilience, and the Workforce Study stands as a vital resource in this endeavor. By providing comprehensive insights into various workforce metrics, it equips dealer members with the necessary tools to thrive amidst emerging trends and transformative mandates, including the ongoing transition to 100% zero-emission vehicles by 2035 and the federal luxury tax.

We extend our sincere gratitude to all dealers and Provincial Associations for their steadfast support and unwavering dedication to fortify the automotive landscape in Canada. Your contributions serve as a cornerstone of our sector, propelling us towards continued success.

This year, we are happy to collaborate with ESi-Q in curating this study. Additionally, we express our appreciation to MNP for their sponsorship, exemplifying their commitment to advancing industry knowledge and fostering growth opportunities for dealerships nationwide. Their invaluable support will help us gather and analyze key employment and labour force data from dealerships across Canada. MNP is one of Canada's leading professional services firms — proudly serving individuals, businesses, and organizations in the areas of accounting, consulting, tax and digital services.

As we embark on another year of progress and collaboration, we invite you to delve into the insights offered within the 2024 National Workforce Study and harness its potential to drive innovation and excellence within your dealership. Together, let us continue to propel the automotive industry forward and shape a thriving future for all.

Warm regards,

Tim Reuss
President & CEO

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II. Key Findings and Statistics

A record 611 CADA member dealerships participated in the CADA 2024 National Workforce Study. Participating dealerships submitted payroll records for all active employees as of December 31, 2023, all employees hired, and all employees terminated during the 2023 calendar year.

The 2024 Industry Report includes key findings and statistics based on a full analysis of 41,000 active and terminated employee payroll records submitted by dealers who participated in the Workforce Study. The retail automotive findings and statistics in the Report are broken down into four levels of information and comparisons:

- All-dealerships nationally
- Luxury and non-luxury (mass market) dealerships
- Higher volume and lower volume dealerships based on units sold
- Urban and rural dealerships.

Retail automotive workforce statistics were also compared to the Canadian Industry and Workforce Statistics published by *Statistics Canada* (*StatCan*).

2023 Annual Compensation and Weekly Wages

The Workforce Study average weekly earnings (including overtime) across all dealership positions in 2023 was \$1,880 – an 11.4 percent increase compared to 2021 (or 5.7 percent annualized earnings growth.) According to StatCan, the average weekly earnings (including overtime) for all Canadian employees in 2023 was \$1,205 – an increase of 6.6 percent compared to 2021 (or 3.3 percent annualized earnings growth.)¹ The average dealership employee weekly earnings in 2023 were 56 percent higher than the average weekly earnings for all Canadian employees in 2023.



¹ Statistics Canada. <u>Table 14-10-0223-01 Employment and average weekly earnings (including overtime) for all employees by province and territory, monthly, seasonally adjusted</u>





In 2023 **64** percent of all employees in the CADA Workforce Study earned more than the 2023 All Canadian average weekly earnings.

According to StatCan, the Consumer Price Index (CPI) increased 10.9 percent from 2021 to 2023.² With an earnings growth rate of 11.4 percent from 2021 to 2023, dealership employee earnings on average kept slightly ahead of the pace of inflation.

Although earnings growth for General Managers and Sales Managers slowed down in 2022 and 2023, earnings growth for Sales Consultants continued at a higher rate that outpaced inflation.

Earnings growth for Service Managers, Service Advisors, and Service Technicians did not keep pace with inflation over the last two years.

	Averag	e Annual Ea	rnin	gs	Median Annual Earnings					
	2021	2023	Gro	owth ³	2021	2023	Gr	owth		
All Positions ⁴	\$87,798	\$97,749	1	11%	\$70,290	\$77,272	1	10%		
General Manager/Operator	\$280,348	\$289,693	1	3%	\$239,284	\$251,450	1	5%		
Sales Manager	\$152,730	\$161,907	1	6%	\$141,638	\$150,145	1	6%		
F&I Manager	\$152,511	\$170,052	1	12%	\$144,667	\$157,410	1	9%		
Service Manager	\$109,809	\$119,875	1	9%	\$105,000	\$113,466	1	8%		
Parts Manager	\$89,883	\$101,382	1	13%	\$86,547	\$94,852	1	10%		
Sales Consultant	\$103,350	\$119,069	1	15%	\$89,074	\$105,038	1	18%		
Service Advisor/Writer	\$68,477	\$74,718	1	9%	\$65,704	\$72,292	1	10%		
Service B-Technician	\$78,485	\$84,755	1	8%	\$75,588	\$80,803	1	7%		
Parts Consultant	\$54,503	\$61,205	1	12%	\$53,215	\$59,705	1	12%		

The 2023 National median salary across All Positions in the Workforce Study is \$77,272 per year, a 10 percent increase compared to 2021. The median means that half (50%) of people working in car dealerships are earning less than \$77,272 while the other half are earning more than \$77,272.

Closely related to the median are three other values: the 25th percentile or "Bottom Quartile," the 75th percentile or "Top Quartile" and the 90th percentile or "Top 10%." (See next page.) In the Bottom Quartile, 25% of car dealership employees are earning less than \$**52,186** while 75% of them are earning more than \$**52,186**. In the Top Quartile, 75% of car dealership employees are earning less than

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² Statistics Canada. <u>Table 18-10-0005-01 Consumer Price Index, annual average, not seasonally adjusted</u>

³ Total earnings growth over two years, not annualized growth rate.

⁴ **All Positions** includes <u>all</u> job titles from Dealer Operator and General Manager to hourly staff (porters, detailers, clerical jobs, etc.)

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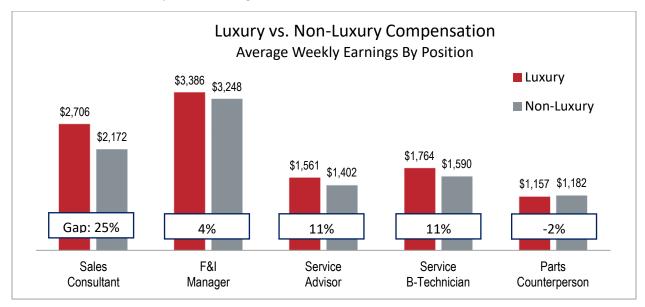


\$115,587 while 25% are earning more than \$115,587. Finally, in the Top 10%, 90% of car dealership employees are earning less than \$174,528 while 10% are earning more than \$174,528.

2023 ANNUAL COMPENSATION BY KEY POSITION – ALL DEALERSHIPS											
	National Average	Bottom Quartile	National Median	Top Quartile	Top 10%						
All Positions	\$97,749	\$52,186	\$77,272	\$115,587	\$174,528						
General Manager/Operator	\$289,693	\$180,000	\$251,450	\$366,881	\$497,431						
Sales Manager	\$161,907	\$119,821	\$150,145	\$191,796	\$238,805						
F&I Manager	\$170,052	\$117,991	\$157,410	\$204,252	\$268,542						
Service Manager	\$119,875	\$92,000	\$113,466	\$142,380	\$173,758						
Parts Manager	\$101,382	\$77,333	\$94,852	\$118,089	\$148,870						
Sales Consultant	\$119,069	\$76,968	\$105,038	\$144,681	\$196,836						
Service Advisor/Writer	\$74,718	\$57,850	\$72,292	\$88,335	\$105,014						
Service B-Technician	\$84,755	\$64,839	\$80,803	\$98,579	\$123,726						
Parts Counterperson	\$61,205	\$49,902	\$59,705	\$70,930	\$82,614						

Luxury vs. Non-Luxury Dealership Compensation

Typically, employees working in luxury franchise dealerships have higher earnings compared to employees in similar positions in non-luxury or mass market dealerships. The differences in earnings vary significantly by position with a 25 percent gap in Sales Consultant earnings to almost no difference in Parts Advisor/ Counterperson earnings.



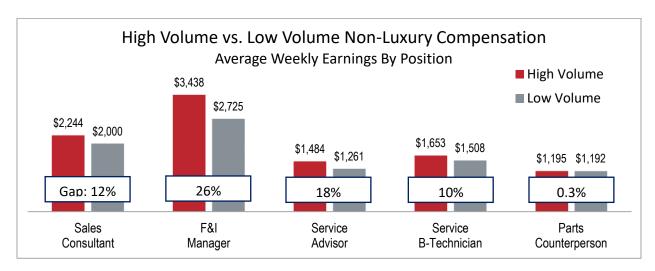




2023 ANNUAL COMPENSATION BY POSITION – NON-LUXURY VS. LUXURY											
Non-Luxury Median Earnings Luxury Median Earnings											
	2021 2023			owth	2021	2023	Gr	owth			
All Positions	\$68,277	\$76,005	1	11%	\$78,556	\$82,800	1	5%			
General Manager/Operator	\$230,783	\$240,619	1	4%	\$319,497	\$300,390	1	-6%			
Sales Manager	\$135,819	\$148,374	1	9%	\$155,495	\$160,400	1	3%			
F&I Manager	\$140,282	\$153,813	1	10%	\$156,205	\$170,894	1	9%			
Service Manager	\$103,279	\$109,200	1	6%	\$114,897	\$138,727	1	21%			
Parts Manager	\$85,920	\$92,114	1	7%	\$92,857	\$112,274	1	21%			
Sales Consultant	\$84,734	\$99,899	1	18%	\$110,992	\$123,331	1	11%			
Service Advisor	\$64,549	\$70,405	1	9%	\$75,104	\$80,325	1	7%			
Service B-Technician	\$72,023	\$79,009	1	10%	\$87,427	\$86,578	4	-1%			
Parts Counterperson	\$52,413	\$59,705	1	14%	\$56,270	\$59,756	1	6%			

High Volume vs. Low Volume Non-Luxury Dealership Compensation

Across nearly all positions employees working in larger high volume franchise dealerships have higher earnings compared to smaller low volume dealership employees. The differences in earnings vary significantly by position. Non-Luxury high volume dealerships sold more than 695 new and used units and nonluxury low volume dealerships sold less than 695 new and used units.





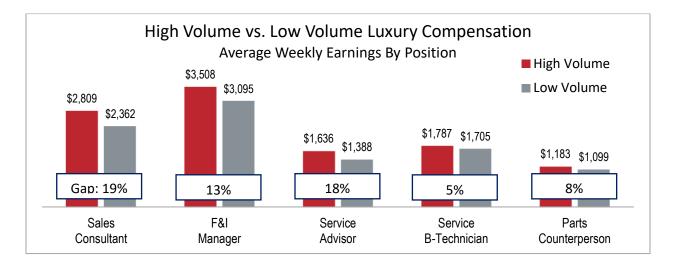


2023 ANNUAL COMPENSATION BY UNIT VOLUME – ALL NON-LUXURY DEALERSHIPS											
	National Average	Gr	owth	National Median	Growth		Low Volume Average	High Volume Average			
All Positions	\$95,744	1	12%	\$76,005	1	11%	\$86,359	\$100,026			
General Manager/Operator	\$278,577	1	6%	\$240,619	1	4%	\$206,828	\$325,695			
Sales Manager	\$160,846	1	7%	\$148,374	1	9%	\$131,514	\$173,615			
F&I Manager	\$168,873	1	15%	\$153,813	1	10%	\$141,691	\$178,795			
Service Manager	\$115,617	1	7%	\$109,200	1	6%	\$103,509	\$125,554			
Parts Manager	\$98,575	1	11%	\$92,114	1	7%	\$89,065	\$106,293			
Sales Consultant	\$112,948	1	16%	\$99,899	1	18%	\$103,493	\$116,229			
Service Advisor/Writer	\$72,879	1	10%	\$70,405	1	9%	\$64,975	\$76,604			
Service B-Technician	\$82,667	1	10%	\$79,009	1	10%	\$77,524	\$85,046			
Parts Consultant	\$61,467	1	14%	\$59,705	1	14%	\$61,361	\$61,524			

Non-Luxury Low volume: < 695 units (new and used) Non-Luxury High volume: > 695 units (new and used)

High Volume vs. Low Volume Luxury Dealership Compensation

Employees working in larger high volume Luxury dealerships have higher earnings compared to smaller low volume dealership employees. The differences in earnings vary significantly by position. Luxury high volume dealerships sold more than 754 new and used units and non-luxury low volume dealerships sold less than 754 new and used units.



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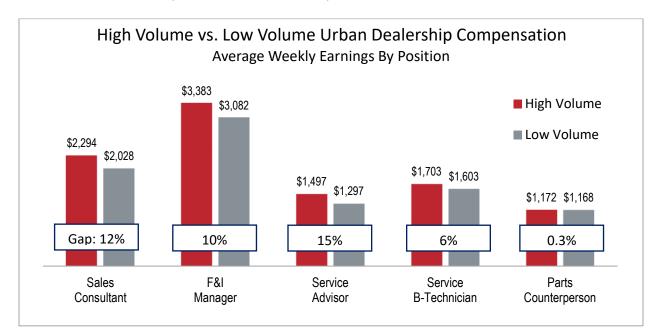


2023 ANNUAL COMPENSATION BY UNIT VOLUME – ALL LUXURY DEALERSHIPS											
	National Average	Growth		National Median	Growth		Low Volume Average	High Volume Average			
All Positions	\$105,667	↑	10%	\$82,800	1	5%	\$95,350	\$108,073			
General Manager/Operator	\$332,736	ψ -	- 4%	\$300,390	4	- 6%	\$285,327	\$348,745			
Sales Manager	\$166,492	1	2%	\$160,400	1	3%	\$145,170	\$176,693			
F&I Manager	\$176,053		0%	\$170,894	1	9%	\$150,360	\$182,438			
Service Manager	\$140,683	↑	20%	\$138,727	1	21%	\$118,788	\$151,695			
Parts Manager	\$113,993	↑	23%	\$112,274	1	21%	\$87,739	\$123,836			
Sales Consultant	\$140,689	↑	14%	\$123,331	1	11%	\$112,779	\$146,021			
Service Advisor/Writer	\$81,191	↑	8%	\$80,325	1	7%	\$70,156	\$85,059			
Service B-Technician	\$91,730	1	4%	\$86,578	4	- 1%	\$83,425	\$92,885			
Parts Consultant	\$60,160	1	6%	\$59,756	1	6%	\$50,892	\$61,502			

Luxury Low volume: < 754 units (new and used) Luxury High volume: > 754 units (new and used)

High Volume vs. Low Volume Urban Dealership Compensation

Employees working in larger high volume Urban dealerships have higher earnings compared to smaller low volume Urban dealership employees. The differences in earnings can vary significantly by position. Urban and rural dealerships are classified based on postal codes.



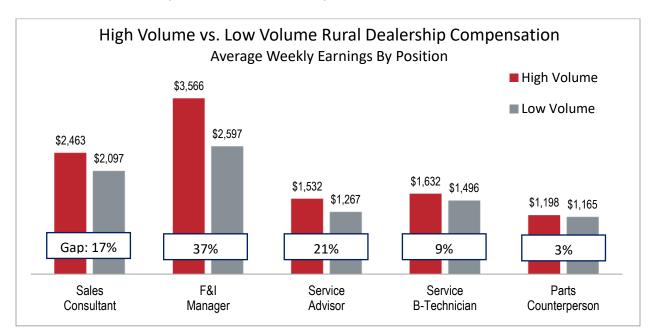
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2023 ANNUAL COMPENSATION BY UNIT VOLUME – ALL URBAN DEALERSHIPS											
	National Average	Gr	owth	National Median	Growth		Low Volume Average	High Volume Average			
All Positions	\$100,682	1	14%	\$79,474	1	12%	\$94,958	\$102,372			
General Manager/Operator	\$327,311	1	4%	\$300,390	4	- 1%	\$280,804	\$349,784			
Sales Manager	\$165,079	1	12%	\$150,802	1	8%	\$134,294	\$175,156			
F&I Manager	\$172,932	1	14%	\$163,011	1	14%	\$160,256	\$175,920			
Service Manager	\$125,891	1	11%	\$120,459	1	14%	\$112,317	\$133,492			
Parts Manager	\$107,001	1	17%	\$99,848	个	11%	\$97,242	\$111,844			
Sales Consultant	\$116,375	个	14%	\$101,921	个	14%	\$105,433	\$119,292			
Service Advisor/Writer	\$75,404	1	7%	\$72,849	1	9%	\$67,431	\$77,817			
Service B-Technician	\$87,382	1	7%	\$83,452	1	5%	\$83,295	\$88,531			
Parts Consultant	\$60,862	1	15%	\$58,633	1	15%	\$60,689	\$60,929			

High Volume vs. Low Volume Rural Dealership Compensation

Employees working in larger high volume Rural dealerships have higher earnings compared to smaller low volume Rural dealership employees. The differences in earnings can vary significantly by position. Urban and rural dealerships are classified based on postal codes.







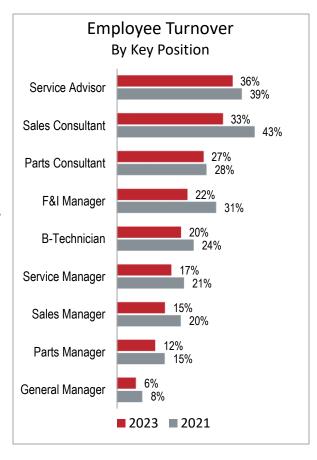
2023 ANNUAL COMPENSATION BY UNIT VOLUME – ALL RURAL DEALERSHIPS											
	National Average	Gr	owth	National Median Growth		Low Volume Average	High Volume Average				
All Positions	\$94,496	1	9%	\$75,572	1	8%	\$84,872	\$100,772			
General Manager/Operator	\$247,705	4	-1%	\$224,322	1	4%	\$185,110	\$303,147			
Sales Manager	\$158,019		0%	\$149,251	1	1%	\$136,013	\$172,609			
F&I Manager	\$166,201	1	8%	\$147,000		0%	\$135,019	\$185,410			
Service Manager	\$113,782	1	7%	\$105,865	1	3%	\$101,301	\$126,815			
Parts Manager	\$96,247	1	9%	\$91,173	1	9%	\$86,523	\$107,185			
Sales Consultant	\$122,331	1	17%	\$108,587	1	22%	\$109,050	\$128,054			
Service Advisor/Writer	\$73,886	1	11%	\$70,971	1	10%	\$65,839	\$79,636			
Service B-Technician	\$82,055	1	10%	\$78,578	1	8%	\$77,778	\$84,840			
Parts Consultant	\$61,567	1	9%	\$60,585	1	8%	\$60,535	\$62,271			

III. 2023 Employee Retention and Turnover

Total annualized employee turnover in Canadian dealerships in 2023 for all job titles combined dropped four points since 2021 to **31** percent.⁵ Employee turnover ranged from a low of **6** percent for General Managers to a high of **50** to **60** percent for lube technicians, lot attendants/porters, cashiers and receptionists. The turnover numbers include voluntary separations and involuntary terminations, as well as retirements.

Retention is defined as the percentage of employees you retain or keep in a position over a period, whereas turnover is defined as the percentage of employees who leave a position over a defined period of time (all separations and/or terminations for any and all reasons).

One-year retention is reported as the percentage of active employees (as of December 31, 2023) who completed at least one full year of employment at the dealership. The all-position one-year retention rate at the end of 2023 was **76** percent, which was unchanged since December 31, 2021.



Three-year retention is reported as the percentage of active employees who completed three full years or more of employment at the dealership. The all-position three-year retention rate dropped **two points** since 2021 to **54** percent in 2023.

Research by ESi-Q shows that sales consultants, service advisors, and service technicians reach their peak productivity after three years in the dealership. The 2023 three-year retention rate for service technicians was **69** percent. Three-year retention rates for sales consultants and service advisors were **49** percent and **45** percent, respectively, which means over 50 percent of employees in these positions leave the dealership before they reach peak productivity.

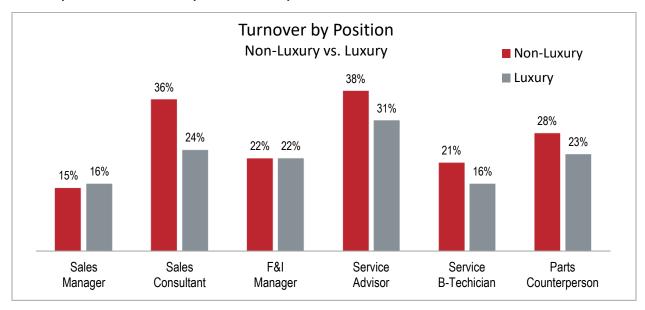
⁵ To calculate the annualized turnover rate, we divide the total number of terminations reported for the 2023 calendar year by the total active head count reported as of December 31, 2023. **All Positions** includes <u>all job titles</u> from Dealer Operator and General Manager to hourly staff (porters, detailers, clerical jobs, etc.)

The median tenure of all active employees at the end of 2023 was **3.3** years and the average tenure was **6.7** years. Median tenure ranged from a high of **11.7** years for General Managers to a low of a little more than **one** year for lube technicians, lot attendants/porters, BDC/schedulers, and receptionists.

Employee Retention and Turnover – All Dealerships

2023 NATIONAL RETENTION AND TURNOVER – ALL DEALERSHIPS										
	Annualized Turnover	1-Year Retention	3-Year Retention	Median Tenure	Average Tenure					
All Positions	31% 🔱 - 4%	76% 0%	52% 🔱 - 2%	3.3 🔱 - 0.2	6.7 - 0 -					
General Manager/Operator	6% 🕹 - 2%	97% 1 4%	88% ↑ 7%	11.7 1 2.1	13.2 1.5					
Sales Manager	15% 🕹 - 5%	91% ↑ 6%	76% 14%	6.7 1 2.0	8.8 1.8					
F&I Manager	22% 🕹 - 9%	85% ↑ 6%	64% 10%	4.5 1.0	6.5 1 0.9					
Service Manager	17% 🕹 - 4%	90% ↑ 5%	73% ↑ 5%	7.9 1 0.6	10.6 10.8					
Parts Manager	12% 🕹 - 3%	93% ↑ 4%	81% ↑ 6%	9.8 1.5	13 1 0.9					
Sales Consultant	33% 🕹 -10%	73% 🔱 - 1%	49% 1 4%	2.9 1 0.2	5.5 1 0.2					
Service Advisor/Writer	36% 🕹 - 3%	73% 1%	45% 🔱 - 3%	2.4 🔱 - 0.4	5.2 1 0.1					
Service B-Technician	20% 🕹 - 4%	86% 0%	69% 🔱 - 1%	6.4 1 0.2	9.3 1 0.1					
Parts Counterperson	27% 🕹 - 1%	76% 🔱 - 2%	50% 🕹 - 7%	3.1 🕹 - 0.8	6.7 🔱 - 0.6					

Luxury vs. Non-Luxury Dealership Retention and Turnover



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2023 NATIONAL RETENTION AND TURNOVER – NON-LUXURY DEALERSHIPS										
	Annualized Turnover	1-Year Retention	3-Year Retention	Median Tenure	Average Tenure					
All Positions	31% 🔱 - 4%	76% 1%	52% 🔱 - 1%	3.4 - 0 -	6.9 - 0 -					
General Manager	7%	97% 1 4%	87% ↑ 6%	11.7 ↑ 2.8	13.3 1.6					
Sales Manager	15% 🕹 - 5%	91% 1 6%	76% 14%	6.9 1 2.3	9.1 1 2.0					
F&I Manager	22% 🕹 - 11%	85% 1 6%	64% 10%	4.5 1 0.9	6.7 1.0					
Service Manager	18% 🔱 - 1%	91% ↑ 5%	74% ↑ 7%	8.0 1.5	10.9 1.0					
Parts Manager	12% 🕹 - 3%	91% 1 3%	80% ↑ 5%	9.5 1.1	13 1 0.6					
Sales Consultant	36% ↓ - 9%	72% 🔱 - 1%	48% ↑ 4%	2.8 1 0.2	5.5 1 0.3					
Service Advisor	38% 🕹 - 2%	72% 1%	44% 🔱 - 3%	2.3 🕹 - 0.4	5.1 1 0.1					
Service B-Technician	21% 🕹 - 3%	86% 1%	69% ↑ 2%	6.4 1 0.4	9.6 1 0.3					
Parts Counterperson	28% 🕹 - 1%	76% 🔱 - 1%	51% 🔱 - 6%	3.2 🕹 - 0.7	7 🔱 - 0.6					

2023 NATIONAL RETENTION AND TURNOVER – LUXURY DEALERSHIPS										
	Annualized Turnover	1-Year Retention	3-Year Retention	Median Tenure	Average Tenure					
All Positions	29% 🔱 - 5%	76% 🔱 - 1%	51% 🔱 - 6%	3.2 🔱 - 0.5	6.1 🔱 - 0.1					
General Manager	5% 🕹 - 8%	98% 1 4%	91% ↑ 8%	10.7 1 0.4	13.1 1.5					
Sales Manager	16% 🕹 - 5%	93% ↑ 6%	77% 15%	5.8 1 0.9	7.5 ↑ 0.9					
F&I Manager	22% 🕹 - 3%	84% 1 2%	63% ↑ 6%	4.5 1.0	5.8 ↑ 0.7					
Service Manager	15% 🕹 - 13%	86% ↑ 5%	71% 🔱 - 2%	7.1 🔱 - 0.7	9.2 🕹 - 0.6					
Parts Manager	10% 🕹 - 9%	99% ↑ 9%	86% ↑ 9%	11.6	12.8 1.8					
Sales Consultant	24% 🔱 - 10%	77% 🔱 - 1%	52% 🔱 - 1%	3.3 🔱 - 0.1	5.6 🕹 - 0.1					
Service Advisor	31% 🕹 - 5%	77% 1 3%	51% 🕹 - 2%	3.1 🕹 - 0.2	5.6 - 0 -					
Service B-Technician	16% 🕹 - 8%	86% 🕹 - 5%	67% 🕹 - 11%	6.3 🕹 - 0.4	8.3 🕹 - 0.6					
Parts Counterperson	23% ↑ 2%	78% 🔱 - 3%	48% 🔱 - 12%	2.5 🔱 - 1.4	5.6 🕹 - 0.4					



Urban vs. Rural Dealership Retention and Turnover

2023 NATIONAL RETENTION AND TURNOVER – URBAN DEALERSHIPS										
	Annualized Turnover	One Year Retention	Three Year Retention	Median Tenure	Average Tenure					
All Positions	31% 🔱 - 5%	76% 1%	52% 🔱 - 2%	3.3 🔱 - 0.1	6.8 ↑ 0.3					
General Manager/Operator	5% 🕹 - 5%	97% ↑ 5%	89% ↑8%	12.3 1.9	13.7 ↑ 0.9					
Sales Manager	17% 🔱 - 4%	91% ↑ 7%	77% 15%	6.8 1 2.2	8.4 1.5					
F&I Manager	22% 🔱 - 9%	86% 1 4%	65% ↑ 7%	5.0 1.3	7.0 1.3					
Service Manager	15% 🔱 - 8%	92% ↑ 7%	76% 10%	9.3 1 2.8	11.4 1.5					
Parts Manager	14% 🕹 - 5%	91% ↑ 3%	81%	10.2 1.5	13.2 1.0					
Sales Consultant	36% 🔱 - 9%	72% 🔱 - 1%	48% 1 4%	2.8 ↑ 0.2	5.7 1 0.5					
Service Advisor/Writer	34% 🕹 - 6%	74% 1 4%	45% 🕹 - 5%	2.4 🕹 - 0.6	5.6 1 0.3					
Service B-Technician	20% 🕹 - 4%	87% 0%	71% 0%	6.8 1 0.7	9.5 1 0.6					
Parts Counterperson	27% 🔱 - 2%	75% 🔱 - 2%	49% 🔱 - 8%	2.7 🔱 - 1.0	6.6 🕹 - 0.3					

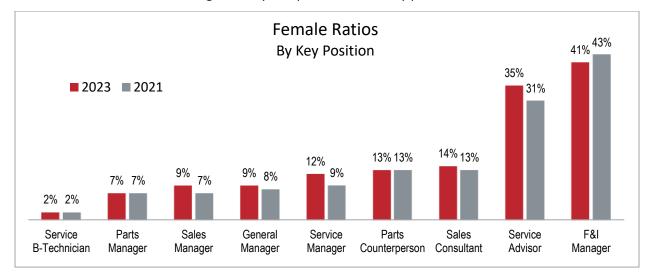
2023 NATIONAL RETENTION AND TURNOVER – RURAL DEALERSHIPS						
Position	Annualized Turnover	One Year Retention	Three Year Retention	Median Tenure	Average Tenure	
All Positions	30% ↓- 3%	76% 0%	53% 🔱 -1%	3.4 🔱 - 0.2	6.7 🔱 - 0.3	
General Manager/Operator	8% ↑ 2%	96% ↑ 2%	87% ↑ 6%	10.5 1 2.4	12.7 1 2.0	
Sales Manager	13% 🕹 - 6%	91% 1 4%	76% 14%	6.5 1.7	9.3 1 2.2	
F&I Manager	24% 🔱 - 7%	82% ↑ 6%	62% 11%	4.2 1.0	6.0 1 0.6	
Service Manager	20% ↑ 2%	88% ↑ 2%	71% 1%	7.2 1 0.2	9.9 1 0.1	
Parts Manager	9% 🕹 - 2%	94% 1 4%	81% ↑ 9%	9.5 1.7	12.8 1 0.8	
Sales Consultant	30% 🕹 - 10%	74% 🔱 - 2%	51% ↑ 7%	3.1 1 0.3	5.3 🕹 - 0.1	
Service Advisor/Writer	40% 1%	71% 🔱 - 2%	45% 🔱 -2%	2.4 🕹 - 0.3	4.8 🕹 - 0.1	
Service B-Technician	20% 🕹 - 5%	85% 0%	66% 🕹 -3%	5.9 🕹 - 0.3	9.1 🕹 - 0.4	
Parts Counterperson	27% 1%	78% 0%	52% 🔱 -6%	3.3 🔱 - 0.9	6.8 🕹 - 0.9	

Dealership Workforce Demographics

The Gender Gap

Retail Automotive is a male-dominated industry. At the end of 2023, **23** percent of active employees in Canadian new car dealerships were women – <u>no change</u> since 2021. According to StatCan employment data for automobile dealers, the female ratio has increased less than 2 percentage points since 2016.

Among the nine key positions, F&I managers have the highest ratio of women at **41** percent, followed by service advisors at **35** percent. Since 2016 the number of females working as F&I managers and service advisors has increased significantly compared to other key positions.

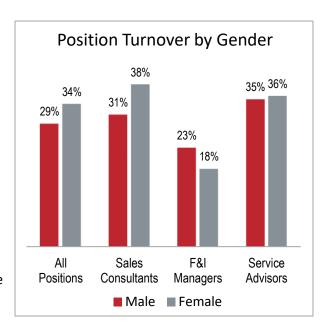


Turnover by Gender

Female employee turnover across all positions in new car dealerships dropped 8 points since 2021 to 34 percent in 2023 – only 5 points higher than the male turnover rate of 29 percent.

Female turnover in the sales consultant position in 2023 dropped **14** points to **38** percent – **7** points higher than the male turnover rate of **31** percent.

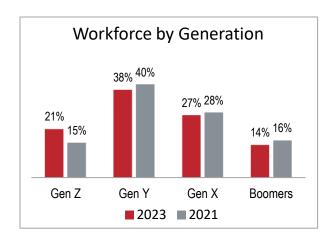
Based on the higher ratio of females and the lower difference in turnover between men and women, the F&I manager appears to be the most "female-friendly" production position followed by the service advisor position.

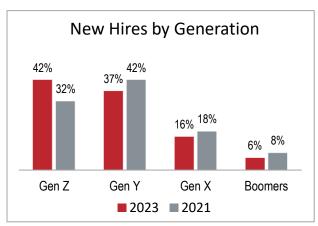


Dealership Workforce by Generation⁶

The median age of all active Canadian dealership employees as of December 31, 2023 was 39.2 years. The median age of male employees was 39.8 years compared to median age of 38.3 years for female employees.

The generational mix of the 2023 workforce continues to shift as the number of Digital Natives (Gen Z) increases and the Generation X and Baby Boomer numbers decrease. Millennials (Gen Y) and Digital Natives are now 59 percent of the dealership workforce. The percentage of Gen Z employees hired by new car dealerships in 2021 increased to 42 percent of all new hires, while the percentage of Gen X new hires decreased to 16 percent.





Generations

Baby Boomers:

Born 1946 to 1964; ages 60 to 78 as of December 31, 2023 Generation X:

Born 1965 to 1980; ages 44 to 59 as of December 31, 2023 Generation Y or Millennials:

Born 1981 to 1996; ages 28 to 43 as of December 31, 2023 Generation Z or Digital Natives:

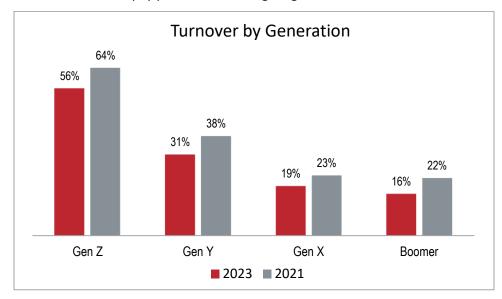
Born after 1996; ages 27 and younger as of December 31, 2023

Since there are no generally accepted beginning or end dates for Generation Y, we have adopted the Pew Research Center definition of generations. This will allow more accurate comparisons of the dealership workforce and the U.S nonfarm private sector. Prior years' age group statistics have been adjusted to report year-over-year changes and multi-year trends. Moving forward, we will continue to use birth years 1981-1996 to define Millennials.

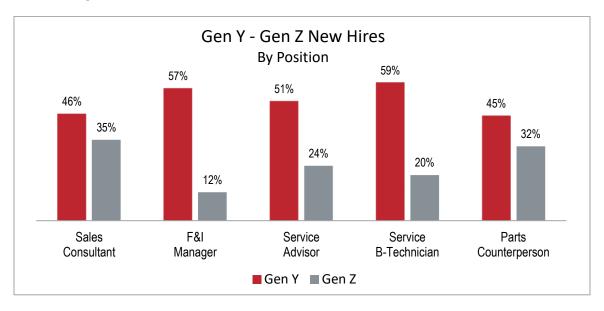
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Digital Native (Gen Z) employee turnover dropped **8** points to **56** percent. Gen Z turnover is still three times the level of turnover in Gen X and Boomer turnover and accounts for a significant portion of total dealership turnover. A significant portion of Baby Boomer turnover is related to retirements. The higher levels of turnover in Millennials and Digital Natives is driven by these three factors — poorly defined career paths, commission-based pay plans, and working long hours and weekends-



A lower number of Digital Natives (Gen Z) were hired for production positions than Millennials (Gen Y). With the exception of sales consultants, Dealerships hired nearly twice as many Millennials for production positions than Digital Native new hires.



IV. Dealership Compensation in 2023

The CADA 2024 Workforce Study includes compensation statistics for 70 different dealership job titles. The statistics labeled **All Positions** includes all 70 job titles.

2023 ANNUAL COMPENSATION BY KEY POSITION – ALL DEALERSHIPS							
	National Average	Bottom Quartile	National Median	Top Quartile	Top 10%		
All Positions	\$97,749	\$52,186	\$77,272	\$115,587	\$174,528		
General Manager/Operator	\$289,693	\$180,000	\$251,450	\$366,881	\$497,431		
Sales Manager	\$161,907	\$119,821	\$150,145	\$191,796	\$238,805		
F&I Manager	\$170,052	\$117,991	\$157,410	\$204,252	\$268,542		
Service Manager	\$119,875	\$92,000	\$113,466	\$142,380	\$173,758		
Parts Manager	\$101,382	\$77,333	\$94,852	\$118,089	\$148,870		
Sales Consultant	\$119,069	\$76,968	\$105,038	\$144,681	\$196,836		
Service Advisor/Writer	\$74,718	\$57,850	\$72,292	\$88,335	\$105,014		
Service B-Technician	\$84,755	\$64,839	\$80,803	\$98,579	\$123,726		
Parts Counterperson	\$61,205	\$49,902	\$59,705	\$70,930	\$82,614		

The 2023 National median salary across All Positions in the Workforce Study is \$77,272 per year, a 10 percent increase compared to 2021. The median means that half (50%) of people working in car dealerships are earning less than \$77,272 while the other half are earning more than \$77,272.

Closely related to the median are three other values: the 25th percentile or "Bottom Quartile," the 75th percentile or "Top Quartile" and the 90th percentile or "Top 10%." In the Bottom Quartile, 25% of car dealership employees are earning less than \$**52,186** while 75% of them are earning more than \$**52,186**. In the Top Quartile, 75% of car dealership employees are earning less than \$**115,587** while 25% are earning more than \$**115,587**. Finally, in the Top 10%, 90% of car dealership employees are earning less than \$**174,528** while 10% are earning more than \$**174,528**.



National Compensation – All Position Quartiles

2023 ANNUAL COMPENSATION – ALL POSITION – ALL DEALERSHIPS						
Position	National Average	Bottom Quartile	National Median	Top Quartile	Top 10%	
MANAGEMENT POSITIONS						
General Manager/Operator	\$289,693	\$180,000	\$251,450	\$366,881	\$497,431	
Controller/Business Manager	\$132,688	\$86,910	\$110,811	\$156,256	\$215,459	
General Sales Manager	\$224,434	\$162,814	\$197,181	\$253,283	\$329,910	
Fixed Operations Director	\$163,824	\$125,677	\$153,675	\$187,708	\$225,292	
Executive Assistant	\$81,386	\$54,161	\$66,560	\$85,979	\$152,391	
ADMINISTRATIVE POSITIONS						
Admin/ Office Manager	\$72,626	\$58,349	\$69,000	\$84,941	\$96,770	
Accountant/ Accounting Manager	\$77,187	\$55,500	\$70,088	\$91,275	\$119,070	
Human Resources Manager	\$89,026	\$65,294	\$78,391	\$100,000	\$138,648	
Payroll Manager	\$69,342	\$55,000	\$65,610	\$80,000	\$100,212	
Clerical Staff: AP/AR/Title	\$50,644	\$43,922	\$49,384	\$55,844	\$64,720	
Cashier	\$40,200	\$34,710	\$37,800	\$44,030	\$48,018	
Receptionist/Switchboard	\$41,317	\$35,351	\$40,030	\$45,711	\$52,765	
SALES POSITIONS						
Sales Manager	\$161,907	\$119,821	\$150,145	\$191,796	\$238,805	
Used/CPO Sales Manager	\$147,425	\$102,814	\$133,038	\$174,366	\$225,788	
Fleet/Commercial Sales Manager	\$170,750	\$91,498	\$140,659	\$237,971	\$326,858	
F&I Manager/ Producer	\$170,052	\$117,991	\$157,410	\$204,252	\$268,542	
F&I Assistant	\$66,645	\$45,448	\$54,500	\$74,357	\$108,387	
Internet Sales/BDC Manager	\$101,163	\$68,954	\$86,594	\$104,838	\$186,208	
Sales Closer/ Team Leader	\$135,901	\$95,538	\$124,287	\$159,834	\$210,064	
Sales Consultant	\$119,069	\$76,968	\$105,038	\$144,681	\$196,836	
Internet Sales Consultant	\$75,061	\$52,987	\$66,595	\$75,716	\$120,192	
Product Specialist	\$63,685	\$50,045	\$56,245	\$64,227	\$88,365	
BDC Rep/CSR/Scheduler	\$55,089	\$41,363	\$48,300	\$60,784	\$82,431	
CSI/Client Relations Manager	\$75,162	\$60,639	\$80,027	\$90,700	\$101,760	
Advertising/Marketing Manager	\$82,770	\$58,299	\$71,545	\$104,671	\$139,900	
U/C Reconditioning Tech	\$61,163	\$37,615	\$50,526	\$70,553	\$95,315	
Dealer Trade Driver	\$47,895	\$37,441	\$43,753	\$54,648	\$66,119	
Car Buyer	\$102,725	\$53,314	\$65,995	\$116,763	\$265,311	





2023 ANNUAL	COMPENSATION			DEALERSHIPS	
Position	National Average	Bottom Quartile	National Median	Top Quartile	Top 10%
SERVICE POSITIONS					
Service Manager	\$119,875	\$92,000	\$113,466	\$142,380	\$173,758
Express/Quick Lube Manager	\$63,497	*	\$62,455	*	*
Shop Foreman/Asst Manager	\$97,113	\$77,271	\$91,843	\$113,966	\$132,463
Service Advisor/Writer	\$74,718	\$57,850	\$72,292	\$88,335	\$105,014
A-Tech/Master/Team Leader	\$92,729	\$73,964	\$88,891	\$109,471	\$131,310
Service B-Technician	\$84,755	\$64,839	\$80,803	\$98,579	\$123,726
C-Tech/Apprentice/Trainee	\$50,302	\$39,051	\$46,718	\$57,607	\$70,879
D-Tech/Hourly Lube Tech	\$43,229	\$35,129	\$41,657	\$48,506	\$55,765
Dispatcher	\$62,653	\$49,245	\$61,861	\$70,824	\$82,000
Warranty Administrator	\$58,135	\$46,769	\$55,136	\$68,175	\$81,059
Detail/PDI/Prep Manager	\$54,420	\$40,560	\$51,049	\$60,210	\$82,262
Appointment Coordinator	\$50,844	\$41,465	\$48,309	\$56,083	\$67,484
Porter/Lot Person/Detailer	\$44,883	\$36,384	\$41,522	\$49,620	\$60,651
Courtesy Shuttle Driver	\$40,273	\$34,187	\$38,272	\$43,882	\$50,947
PARTS POSITIONS					
Parts Manager	\$101,382	\$77,333	\$94,852	\$118,089	\$148,870
Warehouse/Asst Parts Manager	\$77,114	\$64,038	\$73,968	\$88,679	\$100,000
Wholesale Parts Salesperson	\$96,817	\$60,000	\$76,759	\$105,710	\$201,410
Parts Counterperson	\$61,205	\$49,902	\$59,705	\$70,930	\$82,614
Parts Driver	\$42,035	\$37,164	\$41,577	\$45,877	\$48,970
Parts Shipper/Receiver	\$48,021	\$41,013	\$46,163	\$51,689	\$60,636
Parts Stockperson	\$54,036	\$40,895	\$52,500	\$61,596	\$76,601
BODY SHOP POSITIONS					
Body Shop Manager	\$105,934	\$80,000	\$99,380	\$126,829	\$155,759
Body Shop Foreman	\$85,131	\$63,749	\$82,675	\$104,358	\$118,319
Estimator/Advisor	\$68,102	\$51,419	\$65,811	\$79,148	\$97,850
B/S Admin Support	\$50,949	\$42,150	\$48,654	\$60,988	\$66,908
A-Tech/Master Metal-Paint	\$101,448	\$67,248	\$101,450	\$127,743	\$165,344
B-Tech/Metal/Painter	\$88,297	\$63,369	\$83,720	\$109,107	\$132,978
C-Tech/Apprentice/Trainee	\$62,157	\$40,376	\$56,267	\$77,074	\$101,354
D-Tech/Helper/Detailer	\$46,662	\$37,272	\$43,332	\$50,101	\$67,689





2023 ANNUAL COMPENSATION – ALL POSITION – ALL DEALERSHIPS							
Position	National Average	Bottom Quartile	National Median	Top Quartile	Top 10%		
MISCELLANEOUS POSITIONS							
IT Systems/Network Manager	\$107,281	\$71,480	\$93,604	\$134,359	\$160,567		
Website Manager /Webmaster	\$72,080	*	\$61,862	*	*		
Maintenance/Janitor	\$51,953	\$41,529	\$49,007	\$60,000	\$75,000		
Marketing Coordinator	\$65,799	\$49,900	\$57,809	\$77,430	\$94,073		
Social Content Producer	\$47,869	\$39,570	\$48,153	\$55,327	\$62,357		
Inventory and Data Coordinator	\$56,222	\$41,200	\$48,269	\$55,712	\$76,000		
Customer Engagement Coordinator	\$45,334	\$38,400	\$44,480	\$48,687	\$53,214		
IT Administrator	\$66,504	\$51,899	\$67,127	\$75,089	\$89,268		

V. Dealership Retention and Turnover in 2023

The CADA 2024 Workforce Study includes employee retention and turnover statistics for 70 different dealership job titles. The statistics labeled **All Positions** includes all 70 job titles.

Retention is defined as the percentage of employees you retain or keep in a position over a period of time, whereas turnover is defined as the percentage of employees who leave a position over a defined period of time (all separations and/or terminations for any and all reasons).

To calculate the *annualized turnover* rate, we divide the total number of terminations reported for the 2023 calendar year by the total active head count reported as of December 31, 2023.

One-year retention is reported as the percentage of active employees (as of December 31, 2023) who completed at least one full year of employment at the dealership. A one-year retention rate of 78 percent, for example, means that 78 percent of the active employees were hired before January 1, 2023, and 22 percent were hired in the calendar year 2023.

Three-year retention is reported as the percentage of active employees who completed three full years or more of employment at the dealership.

We use employee hire dates to calculate the tenure of each active employee. The *median tenure* of all active employees is reported as years in decimal increments.

2023 NATIONAL RETENTION AND TURNOVER – ALL DEALERSHIPS						
	Annualized Turnover	1-Year Retention	3-Year Retention	Median Tenure	Average Tenure	
All Positions	31% 🔱 - 4%	76% 0%	52% 🔱 - 2%	3.3 🔱 - 0.2	6.7 - 0 -	
General Manager/Operator	6% 🕹 - 2%	97% 1 4%	88% ↑ 7%	11.7 1 2.1	13.2 1.5	
Sales Manager	15% 🕹 - 5%	91% ↑ 6%	76% 14%	6.7 1 2.0	8.8 1.8	
F&I Manager	22% 🕹 - 9%	85% ↑ 6%	64% 10%	4.5 1.0	6.5 1 0.9	
Service Manager	17% 🔱 - 4%	90% ↑ 5%	73% ↑ 5%	7.9 1 0.6	10.6 1 0.8	
Parts Manager	12% 🕹 - 3%	93% 1 4%	81% ↑ 6%	9.8 1.5	13 1 0.9	
Sales Consultant	33% 🕹 -10%	73% 🔱 - 1%	49% 1 4%	2.9 1 0.2	5.5 1 0.2	
Service Advisor/Writer	36% 🕹 - 3%	73% 1%	45% 🕹 - 3%	2.4 🕹 - 0.4	5.2 1 0.1	
Service B-Technician	20% 🕹 - 4%	86% 0%	69% 🔱 - 1%	6.4 1 0.2	9.3 1 0.1	
Parts Counterperson	27% 🕹 - 1%	76% 🔱 - 2%	50% 🕹 - 7%	3.1 🔱 - 0.8	6.7 🔱 - 0.6	

CADA 2024 NATIONAL WORKFORCE STUDY



National Turnover and Retention – All Positions

2023 NATIONAL TUR	NOVER & RE	TENTION – A	LL POSITION -	- ALL DEALER	SHIPS
Position	Annualized	One Year	Three Year	Median	Average
	Turnover	Retention	Retention	Tenure	Tenure
MANAGEMENT POSITIONS					
Dealer Principal/ Owner	4%	100%	97%	24.0	25.3
Dealer Operator/General Manager	6%	97%	88%	11.7	13.2
Controller/Business Manager	9%	92%	78%	8.5	11.3
General Sales Manager	6%	93%	80%	8.4	11.1
Fixed Operations Director	7%	94%	78%	10.5	13.3
Director of Finance	33%	93%	53%	3.5	5.5
Executive Assistant	12%	94%	71%	5.8	10.8
ADMINISTRATIVE POSITIONS					
Admin/ Office Manager	15%	93%	80%	12.3	14.4
Accountant/ Accounting Manager	13%	90%	68%	5.6	9.3
Human Resources Manager	21%	85%	56%	4.2	7.3
Payroll Manager	23%	87%	72%	6.5	10.5
Clerical Staff: AP/AR/Title	28%	79%	51%	3.1	7.1
Cashier	58%	54%	25%	1.2	2.5
Receptionist/Switchboard	55%	54%	21%	1.2	2.7
Accounting Admin Assistant	25%	80%	52%	3.5	6.6
SALES POSITIONS					
Sales Manager	15%	91%	76%	6.7	8.8
Used/CPO Sales Manager	20%	87%	71%	6.1	7.8
Fleet/Commercial Sales Manager	11%	92%	82%	8.9	11.6
F&I Manager/ Producer	22%	85%	64%	4.5	6.5
F&I Assistant	39%	72%	44%	2.4	5.0
Internet Sales/BDC Manager	28%	83%	60%	5.1	7.0
Sales Closer/ Team Leader	13%	83%	63%	4.3	6.9
Sales Consultant	33%	73%	49%	2.9	5.5
Used Sales Consultant	8%	75%	47%	2.7	6.1
Internet Sales Consultant	45%	68%	33%	1.6	3.7
Product Specialist	45%	56%	26%	1.4	3.1
BDC Rep/CSR/Scheduler	50%	65%	30%	1.7	3.2
CSI/Client Relations Manager	8%	84%	51%	3.9	5.8
Advertising/Marketing Manager	7%	89%	63%	3.7	5.8
U/C Reconditioning Tech	18%	82%	64%	5.2	8.7
	100/	700/			F 4
Dealer Trade Driver	13%	78%	57%	3.8	5.4





2023 NATIONAL TURNOVER & RETENTION – ALL POSITION – ALL DEALERSHIPS							
Position	Annualized Turnover	One Year Retention	Three Year Retention	Median Tenure	Average Tenure		
SERVICE POSITIONS							
Service Manager	17%	90%	73%	8.0	10.6		
Express/Quick Lube Manager	40%	70%	65%	6.9	9.2		
Shop Foreman/Asst Manager	14%	91%	83%	10.7	12.9		
Service Advisor/Writer	36%	73%	45%	2.4	5.2		
A-Tech/Master/Team Leader	16%	90%	78%	10.6	12.8		
Service B-Technician	20%	86%	69%	6.4	9.3		
C-Tech/Apprentice/Trainee	34%	68%	30%	1.7	3.1		
D-Tech/Hourly Lube Tech	51%	47%	17%	0.8	2.0		
Dispatcher	31%	74%	53%	3.3	7.0		
Warranty Administrator	16%	87%	67%	6.2	9.2		
Detail/PDI/Prep Manager	43%	67%	48%	2.8	6.0		
Appointment Coordinator	44%	62%	31%	1.5	3.5		
Porter/Lot Person/Detailer	61%	59%	32%	1.4	3.8		
Courtesy Shuttle Driver	30%	74%	45%	2.4	4.9		
PARTS POSITIONS							
Parts Manager	12%	93%	81%	9.8	13.0		
Warehouse/Asst Parts Manager	17%	90%	78%	9.2	11.3		
Wholesale Parts Salesperson	24%	89%	65%	5.1	7.4		
Parts Counterperson	27%	76%	50%	3.1	6.7		
Parts Driver	32%	66%	35%	1.8	4.4		
Parts Shipper/Receiver	49%	65%	31%	1.6	3.7		
Parts Stockperson	46%	74%	43%	2.2	5.7		
BODY SHOP POSITIONS							
Body Shop Manager	24%	92%	76%	7.5	9.7		
Body Shop Foreman	18%	89%	79%	11.9	15.9		
Estimator/Advisor	32%	77%	46%	2.3	5.4		
B/S Admin Support	39%	55%	39%	1.3	5.1		
A-Tech/Master Metal-Paint	17%	90%	69%	5.9	10.0		
B-Tech/Metal/Painter	18%	82%	63%	5.2	9.2		
C-Tech/Apprentice/Trainee	33%	81%	50%	3.0	5.3		
D-Tech/Helper/Detailer	43%	62%	34%	1.5	3.5		





2023 NATIONAL TURNOVER & RETENTION – ALL POSITION – ALL DEALERSHIPS						
Position	Annualized Turnover	One Year Retention	Three Year Retention	Median Tenure	Average Tenure	
IT Systems/Network Manager	3%	95%	73%	7.0	9.9	
Website Manager /Webmaster	4%	81%	42%	1.9	3.8	
Maintenance/Janitor	25%	77%	61%	4.8	6.8	
Marketing Coordinator	34%	70%	40%	2.3	3.7	
Social Content Producer	21%	71%	35%	1.7	2.9	
Inventory and Data Coordinator	14%	86%	57%	3.5	6.5	
Customer Engagement Coordinator	35%	58%	28%	1.2	4.1	
IT Administrator	23%	79%	48%	2.7	4.4	



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