NATIONAL AUTOMOBILE DEALERS ASSOCIATION

NADA

2021
DEALERSHIP WORKFORCE STUDY

Automotive Retail:

NATIONAL & REGIONAL COMPENSATION & RETENTION REPORT

COMPENSATION | RETENTION & TURNOVER | REGIONAL ANALYSIS | DEMOGRAPHICS | LUXURY VS NON-LUXURY

The National Automobile Dealers Association (NADA) has prepared the 2021 Dealership Workforce Study and *Automotive Retail: National & Regional Trends in Compensation & Retention* to assist its dealer members in being as efficient as possible in the operation of their dealerships. The presentation of this information is not intended to encourage concerted action among competitors or any other action on the part of dealers that would in any manner fix or stabilize the price or any element of the price of any good or service.

Each participating dealership received information related to that dealership compared against data aggregated on geographic and other bases. Other than the information from the participating dealership (as provided in that dealership's custom report only), no individual dealership data are disclosed or available. Also, no personally identifiable employee or other individual data, such as names or SSNs, have been gathered and no such information is available.

Use of this Study by a participating dealership is subject to all terms and conditions of the NADA Workforce Study User Agreement that was accepted by the dealership as a condition of participating in the Study.

NADA assumes no liability for a participating dealership's, or manufacturer's, or other purchaser's use of the data contained in the Study.

NADA wishes to acknowledge ESI Trends, the automotive retailing industry's leading provider of workforce metrics, guides and trends, and HR practices. ESI Trends designed the Dealership Workforce Study, collected and analyzed the data, and prepared custom reports for participating dealerships as well as the overall analysis in this volume. With appreciation to the ESI Trends team:

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With special thanks to Patrick Manzi, NADA Chief Economist.

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I. Introduction and Economic Overview

The NADA Dealership Workforce Study (DWS), now in its tenth year, always highlights the latest trends for light- and heavy-duty vehicle dealerships' employment needs.

Like nearly all businesses in the U.S., franchised dealerships were affected by stay-at-home orders and lockdowns across the country because of COVID-19. Dealership employment had been stable for several years at 1.1 million employees, but by the end of April 2020, U.S. franchised dealership employment had fallen to 888,200. Retail demand recovered throughout the rest of the year, and most dealership employees who were furloughed returned to work. At the end of 2020, franchised dealership employment across the country was 1.08 million, down 5.9% from February 2020. We expect that employment will continue to recover, but we may not see employment fully return to pre-pandemic levels for some time.

Many dealerships pivoted quickly to selling vehicles and offering service pickup/delivery exclusively online during the COVID lockdowns. This crisis likely accelerated trends of handling more of the vehicle purchase experience online, and we expect that going forward this will become a more preferred option for many customers. Overall, we believe that many of the changes to the dealership business model made during this past year will stick around long-term.

By the end of 2020, retail light-vehicle sales had recovered, and in some cases exceeded pre-pandemic levels. Looking into 2021 the industry was optimistic for the recovery of fleet sales as the country began to open back up and leisure and business travel recovered. As news of a microchip shortage began to spread, many believed it would be a short-term issue for the industry. On the heels of economic stimulus payments and bloated savings accounts from a year at home, consumers headed to the showrooms for a new vehicle. Retail demand and sales were quite robust during the first six months of 2021 but manufacturers were not able to maintain production volumes at full capacity due to the chip shortage. The result—dealer inventories have fallen nearly each month since the start of the year leading to the lowest inventories on the ground since October 2009.

As we saw in the second half of 2020, when demand is high and supply is low, prices rise. That is certainly the case now in 2021 with many new vehicles sold at or above MSRP. Dealer profitability per unit is at record levels but many are running out of inventory and must get creative to find cars to sell. The shortage of new vehicles has caused used vehicle wholesale pricing to hit records as both consumers and fleet buyers have had to turn to the used market for inventory when they can't find the new cars they want.

As of June 2021, we expect that the chip shortage will continue to impact new vehicle production for the rest of 2021. We believe that dealers will likely experience the worst of the inventory shortage in the early summer months and OEMs will be able to bring back online slowed production lines throughout the summer and into the fall. Still, it will likely take some time to build back inventory levels as OEMs will be re-stocking dealer lots while consumer retail and fleet demand remain high. We expect that used vehicle wholesale prices will peak in the early summer months and then likely plateau or fall slightly into the fall months. We don't expect any major decline in used pricing until new vehicle production and inventories have reached a new normal. Even then, used prices should remain elevated at least somewhat above their pre-COVID levels for the next few years as the country continues to undergo a massive demographic shift with the millennial generation entering its peak earning years and starting families. Our forecast for light-vehicle sales in 2021 is 16.3-16.5 million units.

Looking ahead, we expect real GDP growth of above 6% for 2021 and likely 2022 as the economy recovers. As of June 2021, we have seen prices as measured by the Consumer Price Index and Personal Consumption Expenditures Index well above the Fed's preferred target of 2%. Prices have risen due to supply chain disruptions and surging consumer demand. There is a risk that the inflationary pressures in the economy persist, but the most likely outcome is that these price increases are transitory and will most likely trend back towards 2% - 2.5% by sometime in 2022. We do not expect that the Fed will increase interest rates until the end of 2022, but we may see a rate increase earlier if market conditions warrant it.

America's franchised dealers have always been innovators and the past two years have shown that dealers are resilient and can respond to any challenge that comes their way. Part of being able to react quickly to changing business environments is the ability to understand the role that the dealership workforce plays in making the business successful. Hopefully, the information in this report will give you a better understanding of the dealership workforce nationwide and within your own store.

Patrick Manzi, PhD

NADA Chief Economist

II. Looking Back on 2020

The COVID-19 Pandemic created seismic changes and challenges in 2020, which the U.S. Auto Industry had not seen since the 2008 to 2009 Great Recession. In contrast, the 2020 industry decline and recovery happened quickly within the same calendar year.

The challenges and impacts on the U.S. dealership workforce also saw a rapid decline and recovery within the same year. Normally, the NADA Dealership Workforce Study looks at annualized human capital management (HCM) statistics and reports the year-over-year trends to highlight the improvements and opportunities.

When we look at 2020 in the same way that we looked at the last ten years, some of the statistics are surprisingly normal.

- Average and median weekly earnings grew at the same 4 percent to 5 percent rate as they have for the last several years.
- The 2020 annualized turnover rate for all positions was unchanged compared to 2019 at 46 percent.

Other HCM statistics seem counter-intuitive and require explanation.

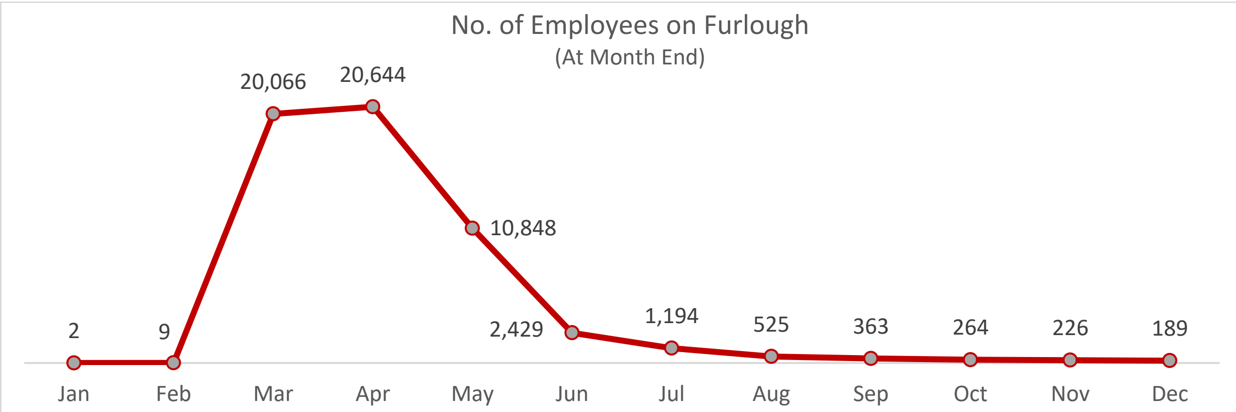
- Median tenure and retention rates at one year and three years increased significantly compared to prior years.
- Employee productivity measured as monthly gross profit per employee increased significantly compared to prior years.
- General Manager compensation jumped 18 percent, but interestingly General Manager compensation in domestic and mass market import brands increased 24 percent compared to an increase of 5 percent in luxury brand dealerships.

To better understand and explain what happened in 2020 from a workforce perspective, we had to look at the payroll data submitted by the Study participants on a month-by-month basis. We also had to consider the factors impacting dealership profitability in the first half of the year compared to the second half of 2020. In many cases the profitability factors and monthly workforce trends were intertwined.

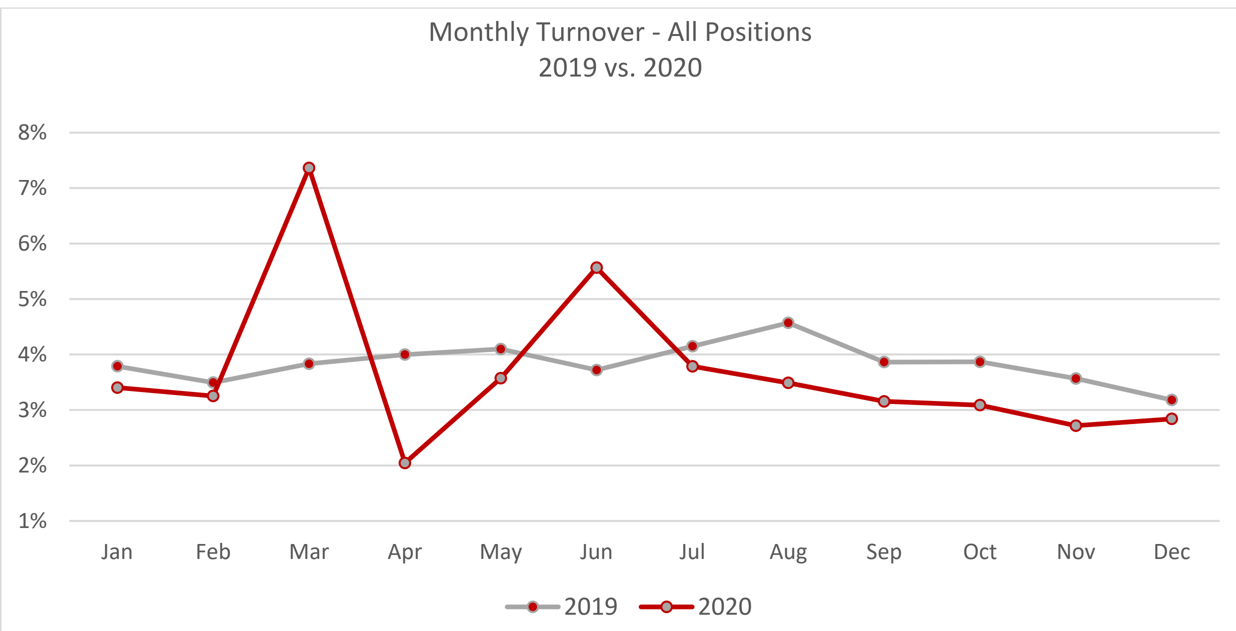
Furloughs and Terminations

The 1,905 car dealerships who participated in this year's Workforce Study had a total active workforce of 150,000 on January 1, 2020. Nearly 60 percent of this year's dealership participants were able to provide furlough start and end dates by employee. Furloughed employees were counted as active employees until they were officially terminated. In March and April 2020, the 1,100 participating dealerships who submitted furlough data terminated or furloughed 23 percent of all employees who were active at the end of February.

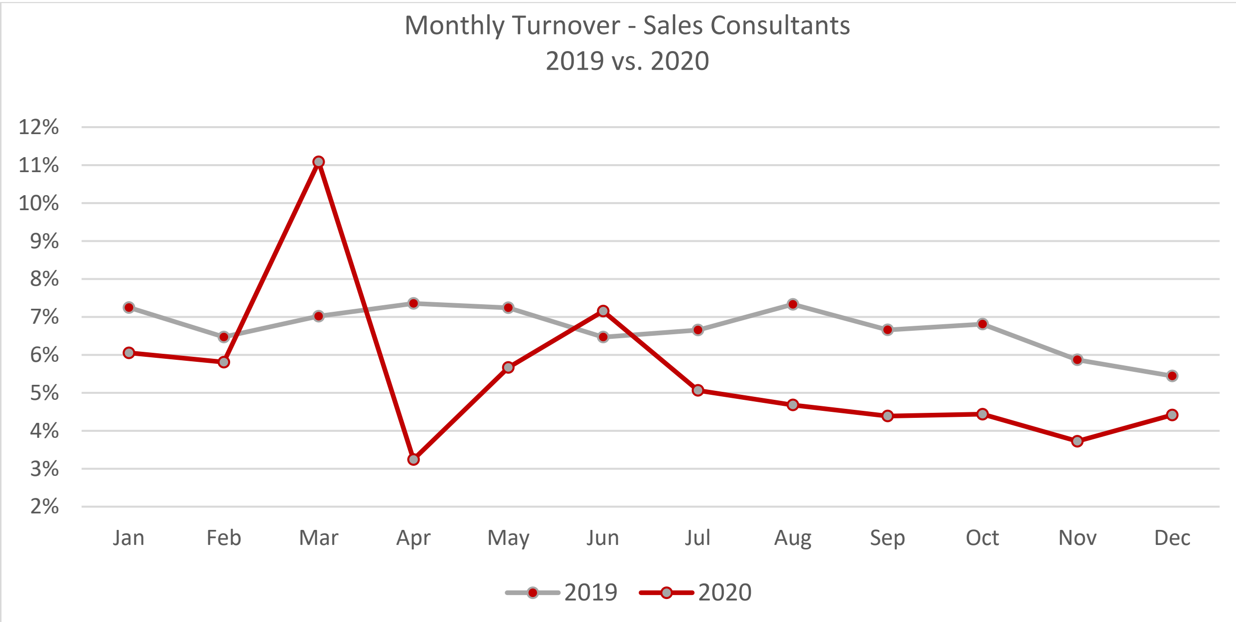
By the end of June 2020, 90 percent of the employees who were furloughed were called back to work or were terminated. Generally, the decisions to call back or terminate were based on seniority and performance.



Total employee turnover in 2019 was nearly level on a monthly basis with an annualized turnover rate of 46 percent in the first half and 46 percent in the second half of the year. In 2020, total annualized employee turnover was over 50 percent in the first half and dropped to an annualized rate of 38 percent in the second half of the year.



In 2020, total annualized sales consultant turnover was 78 percent in the first half and dropped to an annual rate of 53 percent in the second half of 2020, a 25 point drop compared to the second half of 2019.



By the end of 2020, the Workforce Study participants reduced active employee headcounts by an average of 10 percent.

Findings and Conclusions

Two primary factors account for most of the unusual year-over-year changes and trends in this year's Industry Trends Report.

1. The dealers quick response in adjusting and managing staffing.
2. Increases in gross profit per vehicle retailed due to inventory shortages across the industry.

As a result of these two factors and the cost reductions associated with them, unusual changes cascaded across multiple human capital management statistics.

- Staffing cuts and other cost reductions (advertising, inventory costs, etc.) resulted in record dealership net profit in 2020.
- General Manager compensation which is mostly based on net profit increased 18 percent.
- New vehicle gross profit per unit increased 21 percent in non-luxury stores, compared to a 7 percent increase in luxury stores, resulting in a 24 percent increase in non-luxury General Manager compensation.
- Higher gross profit per unit resulted in an 8 percent average compensation increase in sales positions for the year, while fixed operations positions experienced little to no increase in compensation.
- Since nearly all of the increased gross profit came in the second half of the year, sales consultant earnings are estimated to have increased 16 percent in the second half resulting in significantly lower second half turnover.
- Staffing reductions based on seniority and performance led to significantly higher median tenure and three-year retention rates at year-end 2020.

Finally, staffing reductions and higher gross profits resulted in a 31 percent increase in employee productivity in the second half of the year from $8,136 gross profit per employee per month in the first half of 2020 to $10,645 in the second half of 2020.

III. 2021 Executive Summary

2020 Weekly Earnings – All Positions

Average	Median	All USA Median[1]
$1,554 Up ↑ 5.7%	$1,181 Up ↑ 3.4 %	$966 Up ↑ 5.3%

- Dealership median earnings were **22**% higher than the US private sector median earnings.
- At **3.4**%, dealership median earnings growth lagged the US private sector earnings growth by **1.9**% in 2020.
- General Manager median earnings increased **16.1**%
- Department Manager median earnings increased **5.2**%
- Median earnings on a "Same Employees" basis increased by **2.1**%

	Average	Median
General Manager	$8,138 ↑18.1%	$6,394 ↑16.1%
Dept. Managers	$2,800 ↑5.3%	$2,572 ↑5.2%
Sales Consultant	$1,561 ↑8.9%	$1,365 ↑9.0%
Service Advisor	$1,423 ↑3.2%	$1,332 ↑3.3%
B-Service Techs	$1,263 ↑2.3%	$1,164 ↑2.9%

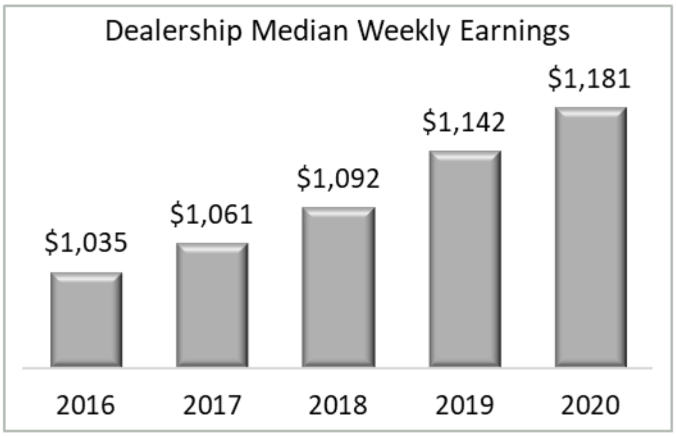
	Average Weekly Earnings			Median Weekly Earnings		
Data Source	**2019**	**2020**	**Growth**	**2019**	**2020**	**Growth**
All DWS Dealerships	$1,470	$1,554	↑ 5.7%	$1,142	$1,181	↑ 3.4%
DWS Same Stores	$1,494	$1,565	↑ 4.7%	$1,160	$1,179	↑ 1.6%
DWS Same Employees	$1,560	$1,665	↑ 6.7%	$1,219	$1,245	↑ 2.1%
BLS U.S. Private Sector[1]	$963	$1,014	↑ 5.3%	$917	$966	↑ 5.3%

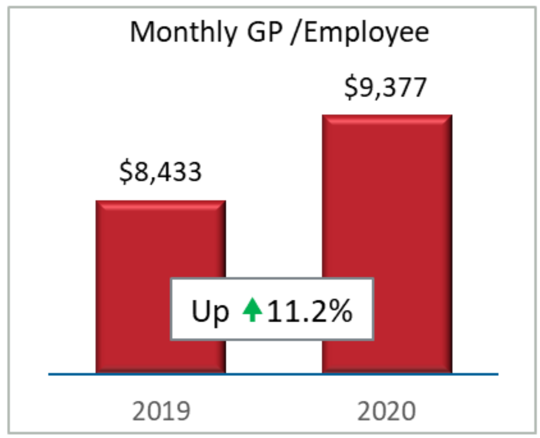
Note: Comparisons to BLS weekly earnings should be interpreted with caution due to pandemic-related employment changes. As unemployment among lower-paid workers increased, average and median earnings for higher-paid employed workers showed an increase.

[1] US BLS – 2020 Median weekly earnings of all private sector full-time wage and salary workers based on average of 1st and 4th quarters.

2020 Weekly Earnings – All Positions

- US Bureau of Labor Statistics 2020 average weekly earnings for auto dealers was $1,098 – **42**% lower than this Study.
- The BLS 2020 weekly earnings growth rate for auto dealers was equal to the earnings growth for dealers participating in this Study at **5.7**%
- The BLS five-year earnings growth rate for auto dealers is also equal to the five-year growth rate for dealers participating in this Study at **3.5**%





- Productivity measured as monthly gross profit per employee increased from $8,136 in the 1st half of 2020 to $10,645 in the 2nd half – an increase of **31**%[2].

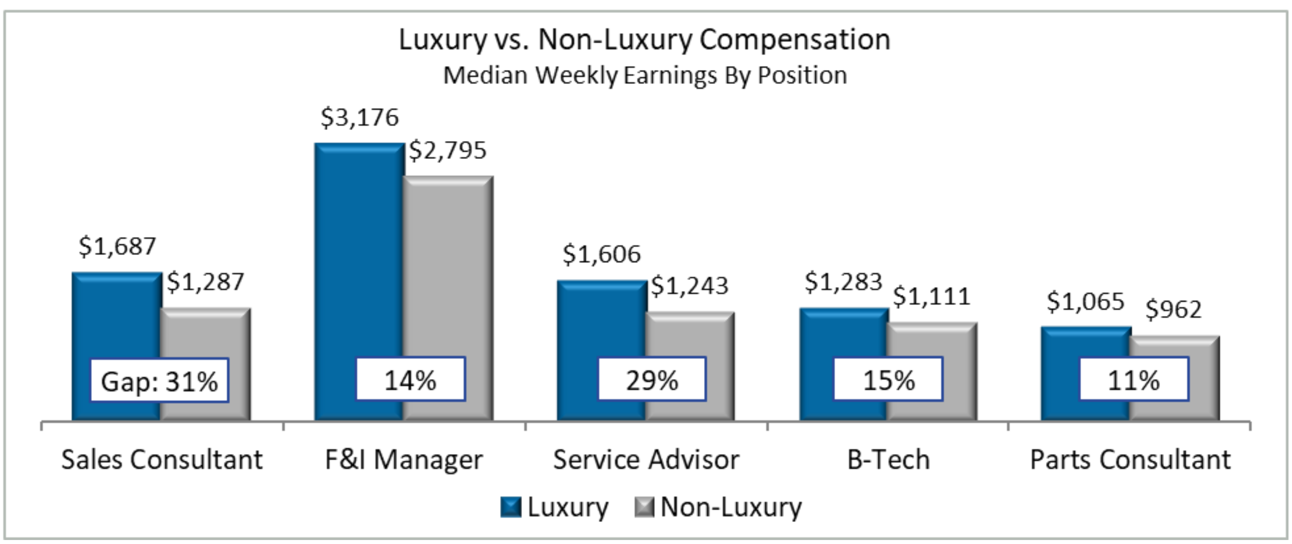
Car Dealers	Average Annual Earnings			Median Annual Earnings		
Position	**2019**	**2020**	**Growth**	**2019**	**2020**	**Growth**
All Positions	$76,440	$80,825	↑ 5.7%	$59,409	$61,389	↑ 3.4%
General Manager/Operator	$358,461	$423,179	↑ 18.1%	$286,471	$332,484	↑ 16.1%
Sales Manager	$139,843	$151,075	↑ 8.0%	$131,809	$141,858	↑ 7.6%
F&I Manager	$154,371	$159,618	↑ 3.4%	$142,979	$148,729	↑ 4.0%
Service Manager	$134,681	$133,260	↓ 1.1%	$122,875	$125,152	↑ 1.9%
Parts Manager	$109,080	$105,701	↓ 3.1%	$98,780	$96,394	↓ 2.4%
Sales Consultant	$74,469	$81,150	↑ 8.9%	$65,125	$70,976	↑ 9.0%
Service Advisor/Writer	$71,686	$74,014	↑ 3.2%	$67,048	$69,284	↑ 3.3%
B-Service Technician	$64,208	$65,661	↑ 2.3%	$58,868	$60,553	↑ 2.9%
Parts Consultant	$54,972	$53,747	↓ 2.2%	$52,544	$51,322	↓ 2.3%

[2] Due to a 20% increase in new vehicle gross profit and a 10% reduction in staffing.

2020 Earnings – Non-Luxury vs. Luxury

Annual Average	Non-Luxury Earnings			Luxury Earnings		
Position	2019	2020	Growth	2019	2020	Growth
All Positions	$73,222	$78,129	↑ 6.7%	$86,549	$89,197	↑ 3.1%
General Manager/Operator	$337,543	$419,635	↑ 24.3%	$412,336	$431,855	↑ 4.7%
Sales Manager	$135,281	$146,638	↑ 8.4%	$155,329	$166,098	↑ 6.9%
F&I Manager	$148,587	$155,541	↑ 4.7%	$176,985	$176,382	↓ 0.3%
Service Manager	$126,214	$126,800	↑ 0.5%	$157,592	$151,163	↓ 4.1%
Parts Manager	$104,228	$101,989	↓ 2.1%	$124,246	$117,001	↓ 5.6%
Sales Consultant	$70,200	$76,604	↑ 9.1%	$88,848	$96,757	↑ 8.9%
Service Advisor/Writer	$66,184	$68,223	↑ 3.1%	$85,658	$88,786	↑ 3.7%
B-Service Technician	$60,822	$62,752	↑ 3.2%	$71,669	$72,089	↑ 0.6%
Parts Consultant	$53,164	$52,521	↓ 1.2%	$59,832	$57,117	↓ 4.5%

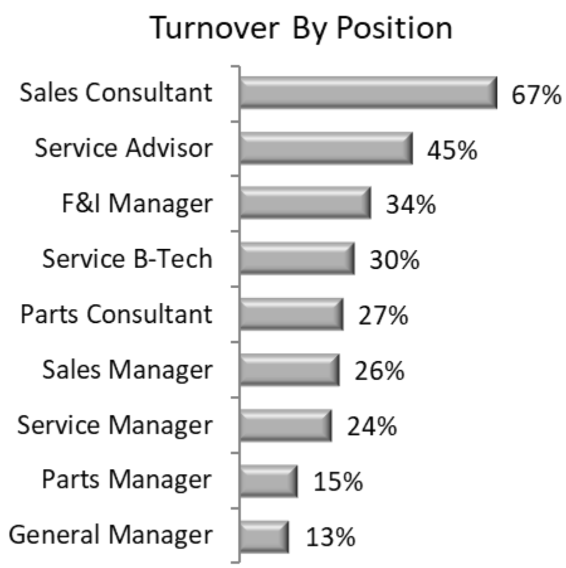
Weekly Median	Non-Luxury Earnings			Luxury Earnings		
Data Source	2019	2020	Growth	2019	2020	Growth
All DWS Dealerships	$1,092	$1,133	↑ 3.8%	$1,321	$1,337	↑ 1.2%
DWS Same Stores	$1,099	$1,126	↑ 2.5%	$1,336	$1,338	↑ 0.1%
DWS Same Employees	$1, 137	$1,180	↑ 3.8%	$1,392	$1,409	↑ 1.2%

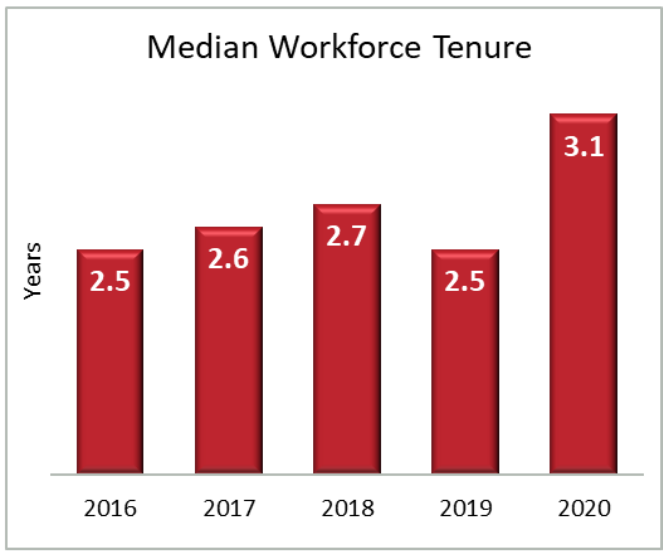


2020 Total Turnover & Retention

Turnover	3-Yr Retention	Median Tenure
46% Unchanged	51% Up 5 Pts	3.1 years Up 0.6 years

- Total turnover in 2020 was unchanged at – **46**%, however turnover dropped from **50**% in the first half of the year to **38**% in the second half.
- USA private sector total turnover in 2020 increased 14 points to **63**%[3].
- Retention and tenure increased significantly since last year in most positions.
- Sales Consultant full-year turnover dropped 13 points to **67**%, however turnover dropped from an annualized rate of **78**% in the first half of the year to **53**% in the second half.
- Service Technician and Parts Consultant turnover increased 2 and 6 points, respectively.





National Retention and Turnover – Cars – All Dealerships

Position	Annualized Turnover	Year/Year Change	1-Year Retention	3-Year Retention	Median Tenure
All Positions	46%	0%	77%	51%	3.1
All Non-Luxury Positions	49%	0%	77%	49%	2.9
All Luxury Positions	38%	3%	80%	55%	3.6

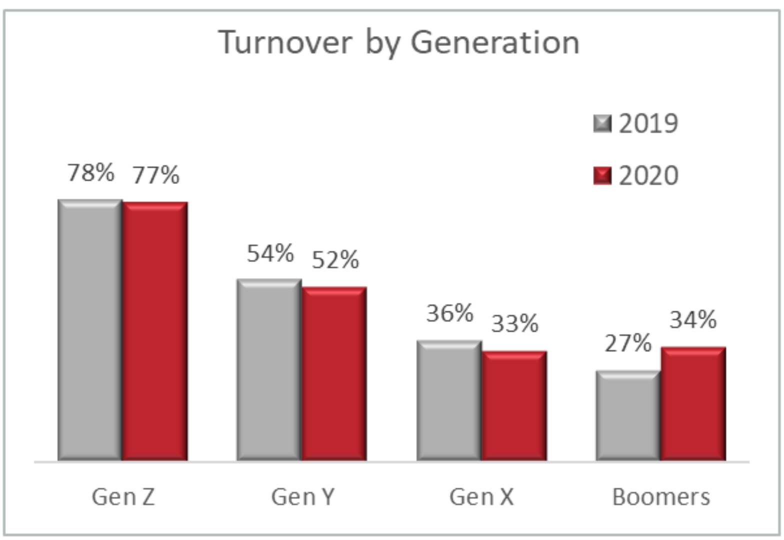
[3] US Bureau of Labor Statistics Job Openings and Labor Turnover Survey.

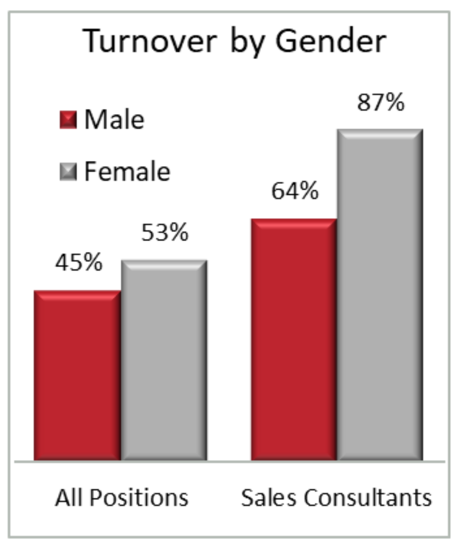
2020 Total Turnover & Retention

National Retention and Turnover – Cars – All Dealerships					
Position	Annualized Turnover	Year/Year Change	1-Year Retention	3-Year Retention	Median Tenure
All Positions	**46%**	0%	**77%**	**51%**	**3.1**
General Manager/Operator	13%	↓ 6%	93%	79%	9.6
Sales Manager	26%	↓ 7%	85%	62%	4.5
F&I Manager	34%	↓ 7%	82%	56%	3.6
Service Manager	24%	↓ 1%	88%	70%	6.0
Parts Manager	15%	↑ 2%	93%	81%	10.6
Sales Consultant	67%	↓ 13%	69%	39%	2.1
Service Advisor/Writer	45%	↓ 3%	76%	47%	2.7
B-Service Technician	30%	↑ 2%	80%	60%	4.0
Parts Consultant	27%	↑ 6%	85%	65%	5.1

Overall Short-Time Hires[4]: 20% ↓ 6 points

Sales Consultant Short-Time Hires: 32% ↓ 5 points

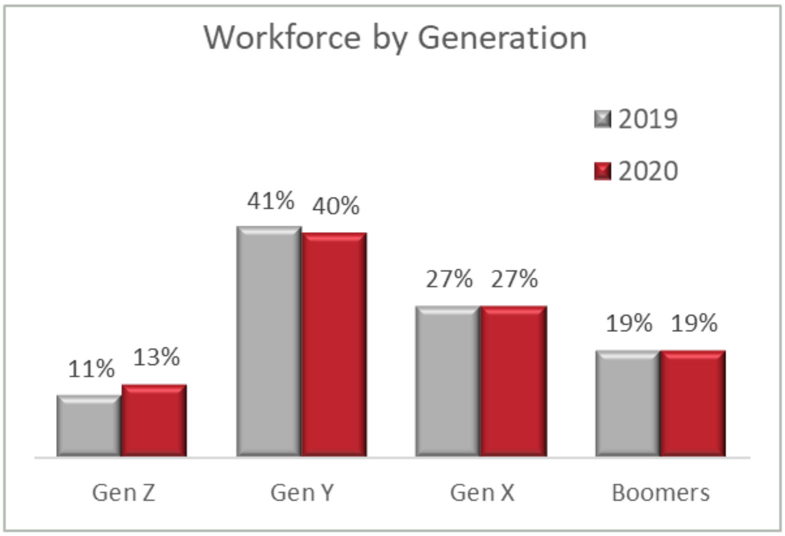


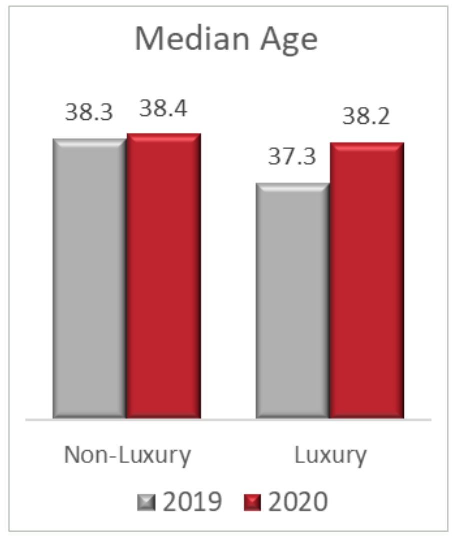


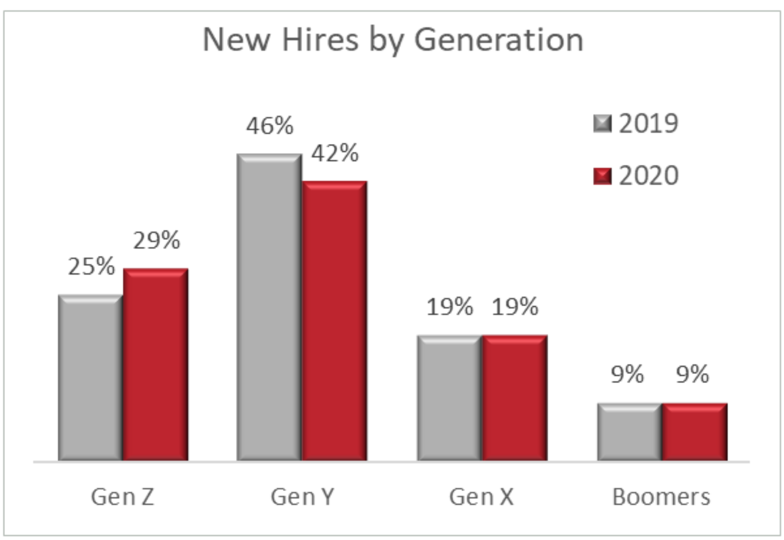
[4] Employees who were terminated within the first 90 days.

2020 Dealership Demographics

Gen Y Actives	Gen Y New Hires	Gen Z Actives	Gen Z New Hires
40%	42%	13%	29%
Down ↓ 1 Pt	Down ↓ 4 Pts	Up ↑ 2 Pts	Up ↑ 4 Pts







Overall
Hiring Efficiency[5]

64%
Up 5 Pts

Sales Consultant
Hiring Efficiency

54%
Up 4 Pts

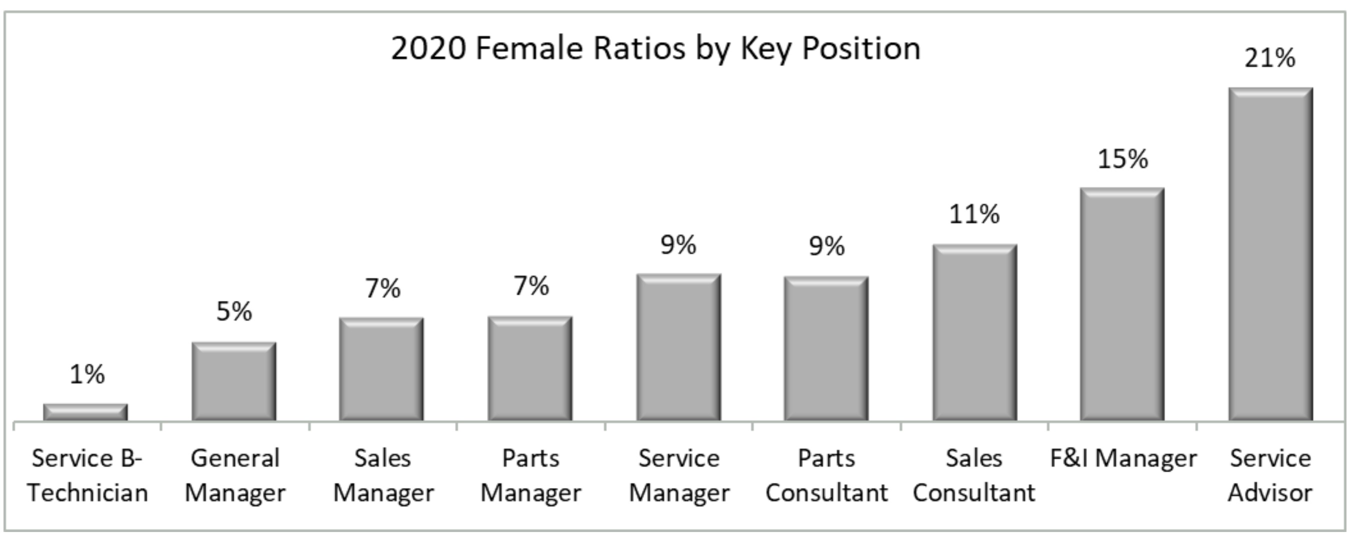
[5] Hiring efficiency is the number of open positions divided by the number of new employees hired to fill those open positions. If it takes two new hires to find one "right" employee, then hiring efficiency is 50 percent.

2020 Dealership Demographics

Female Actives	Female New Hires
19%	21%
Unchanged	Unchanged

- The Service Advisor position continues to have the highest number of females at **21**% – no change since last year.
- Female F&I Managers increased one point to **15**% and female Sales Managers increased one point to **7**%.
- The number of female sales consultants hired in 2020 dropped one point to **15**% after a three-point increase in 2019.
- Female Sales Consultant turnover dropped 25 points from 112% to 87%, but that had little impact on the number females working in dealerships.

Dealers and General Managers need to make their "Why Work Here" message more attractive to females and make the workplace culture more female-friendly.



Truck Dealership Workforce Summary

2020 Weekly Earnings – All Positions

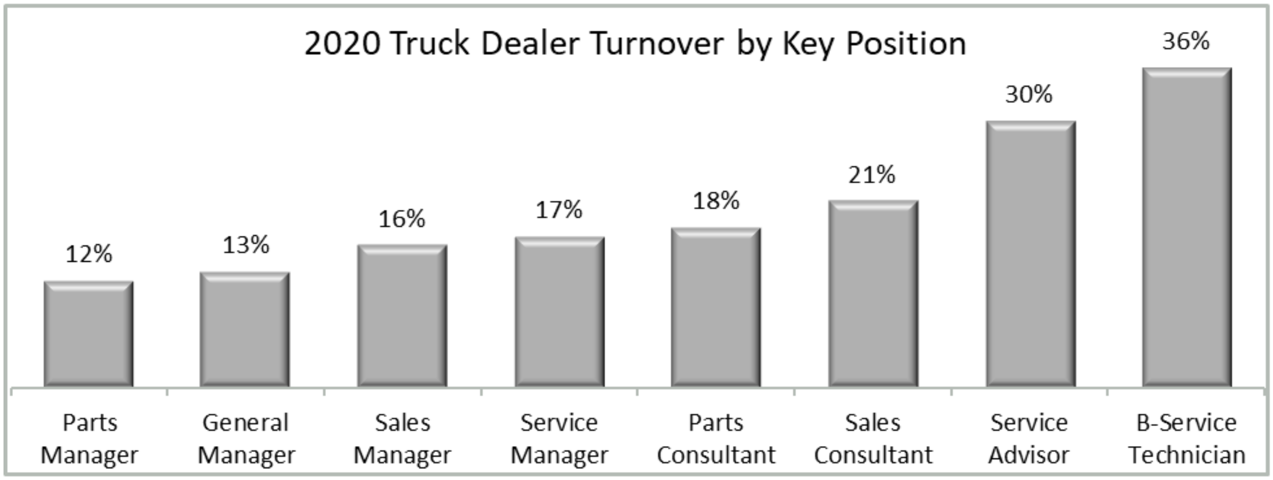
- Truck dealership median earnings are **18**% higher than the USA private sector median earnings.
- Median earnings growth was **3.0**% compared to the All-USA earnings growth rate of **5.3**% – average earnings grew at a slower pace.
- The number of truck dealers participating in this year's Study increased 40% to 171 dealerships.
- The "Same Stores" statistics are from 75 dealerships who participated this year and last year.

	Average Weekly Earnings			Median Weekly Earnings		
Data Source	**2019**	**2020**	**Growth**	**2019**	**2020**	**Growth**
All Truck Dealerships	$1,337	$1,362	▲ 1.8%	$1,103	$1,136	▲ 3.0%
Truck Same Stores	$1,344	$1,317	▼ 2.0%	$1,111	$1,100	▼ 1.0%
BLS U.S. Private Sector[6]	$963	$1,014	▲ 5.3%	$917	$966	▲ 5.3%

Truck Dealers	Average Annual Earnings			Median Annual Earnings		
Position	**2019**	**2020**	**Growth**	**2019**	**2020**	**Growth**
All Positions	$69,517	$70,812	▲ 1.8%	$57,364	$59,049	▲ 2.9%
General Manager/Operator	$172,880	$188,931	▲ 9.3%	$144,410	$157,354	▲ 9.0%
Sales Manager	$153,737	$155,840	▲ 1.4%	$144,410	$135,378	▼ 6.5%
Service Manager	$99,126	$95,920	▼ 3.3%	$95,753	$90,358	▼ 5.8%
Parts Manager	$94,517	$94,310	▼ 0.2%	$89,808	$86,824	▼ 3.4%
Sales Consultant	$125,369	$124,052	▼ 1.1%	$98,035	$99,048	▲ 1.0%
Service Advisor/Writer	$55,220	$57,448	▲ 4.0%	$53,302	$55,200	▲ 3.6%
Service B-Technician	$59,893	$62,769	▲ 4.8%	$57,565	$60,040	▲ 4.3%
Parts Consultant	$55,679	$57,050	▲ 2.5%	$53,389	$54,849	▲ 2.7%

[6] US Bureau of Labor Statistics – 2020 Median weekly earnings of all private sector full-time wage and salary workers.

2020 Turnover & Retention – All Positions



Less than 2% of all truck dealership employees were furloughed compared to 16% in car dealerships, which may explain the higher turnover rates in 2020 across all positions due to more terminations instead of furloughs.

National Retention and Turnover – Trucks – All Dealerships

Position	Annualized Turnover	Year/Year Change	1-Year Retention	3-Year Retention	Median Tenure
All Positions	**26%**	▲ **3%**	**85%**	**59%**	**4.3**
General Manager/Operator	13%	▲ 5%	92%	72%	7.2
Sales Manager	16%	▲ 5%	96%	73%	8.7
Service Manager	17%	▲ 3%	90%	72%	6.7
Parts Manager	12%	▲ 5%	92%	76%	8.4
Sales Consultant	21%	▲ 6%	88%	68%	5.6
Service Advisor/Writer	30%	▲ 6%	79%	49%	2.9
B-Service Technician	36%	▲ 13%	81%	51%	3.2
Parts Consultant	18%	▲ 3%	88%	64%	5.2

Key to Symbols and Terminology

Legend
Year-Over-Year Changes in Compensation
(↑) represents year-over-year increases or favorable changes in compensation (↓) represents year-over-year decreases or unfavorable changes in compensation
Year-Over-Year Changes in Turnover
(↓) represents year-over-year decreases or favorable changes in turnover (↑) represents year-over-year increases or unfavorable changes in turnover
Insufficient Data
(*) fewer than 5 rooftops and/or 10 records for averages <u>OR</u> fewer than 5 rooftops and/or 30 records for quartiles
Unit Sales Volume (New Units Only)
Non-Luxury Cars: Low volume: < 503 units; Medium: 503 to 1,121 units; High volume: > 1,121 units Luxury Cars: Low volume: < 595 units; High volume: > 595 units Medium- to Heavy-Duty Trucks: Low volume: < 127 units; High volume: > 127 units
Generations
Baby Boomers: Born 1946 to 1964; ages 57 to 75 as of December 31, 2020 Generation X: Born 1965 to 1980; ages 41 to 56 as of December 31, 2020 Generation Y or Millennials: Born 1981 to 1996; ages 25 to 40 as of December 31, 2020 The post-Millennial Generation (aka Gen Z or Digitals): Born after 1996; ages 24 and younger as of December 31, 2020
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 non-farm 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 Millennial.

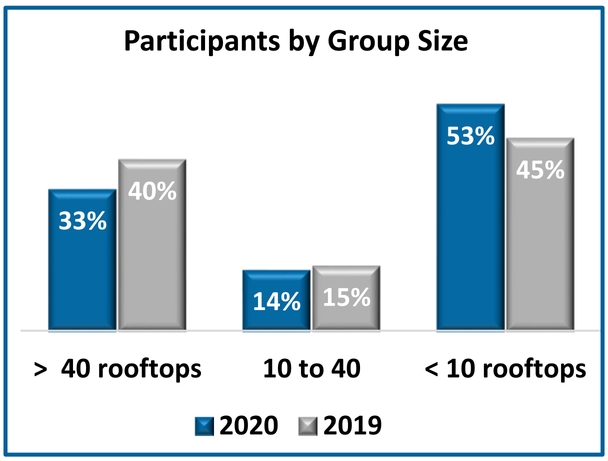
IV. General Findings and Conclusions

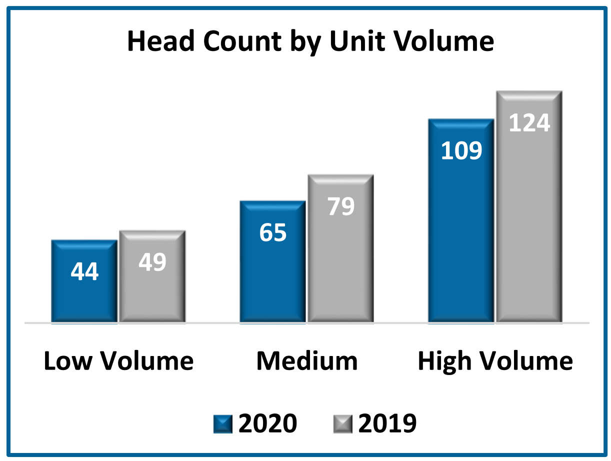
Car and Light Truck Dealerships

Size of Participating Dealerships

For the first time in ten years, more than half of the Study participants had less than 10 rooftops. Small groups and single dealerships accounted for 53 percent of all participants, an increase of eight points.

The average employee headcount for dealerships and retail groups in this year's Study was 71 employees at year-end, a 10 percent reduction due to the Pandemic. The average headcount in dealerships that participated in 2019 and 2020 (same stores) dropped 10 percent from 83 to 75 employees. By comparison, the average headcount for all dealerships in NADA Data 2020 was 64 employees, down 7 percent from 2019.





Compensation Trends

The compensation analysis and trends in this section discuss both all-participant data and same-stores data (identifying each data set), since 68 percent of 2020 Study participants also participated in 2019.

Earnings Growth Comparison – All Positions

In 2020, average weekly earnings growth of 5.7 percent in new-car dealerships was similar to average earnings growth in the U.S. non-farm private sector. Median weekly income of $1,181 in 2020 increased at a slower rate, but was still 22 percent higher than the median weekly earnings of $966 for the U.S. non-farm private sector workforce.[7]

7 Comparisons to BLS 2020 weekly earnings should be interpreted with caution due to pandemic-related employment changes. As unemployment among lower-paid workers increased, average and median earnings for higher-paid employed workers showed an increase.

	Average Weekly Earnings			Median Weekly Earnings		
Data Resource	**2019**	**2020**	**Growth**	**2019**	**2020**	**Growth**
All DWS Dealerships	$1,470	$1,554	↑ 5.7%	$1,142	$1,181	↑ 3.4%
DWS Same Stores	$1,494	$1,565	↑ 4.7%	$1,160	$1,176	↑ 1.6%
DWS Same Employees	$1,560	$1,665	↑ 6.7%	$1,219	$1,245	↑ 2.1%
BLS U.S. Private Sector	$963	$1,014	↑ 5.3%	$917	$966	↑5.3%

The all-position, all-participants national average annual earnings increased 5.7 percent to $80,825. Six of the nine key dealership positions saw increases in annual earnings. General Managers, Sales Managers and Sales Consultants saw the greatest earnings increases. Fixed Operations positions had the lowest increases compared to last year. Service Advisors and B-Service Technicians had average earnings gains from two to three percent, while Parts Managers' and Parts Consultants' average earnings decreased two to three percent.

All Car Dealers	Average Annual Earnings			Median Annual Earnings		
Position	**2019**	**2020**	**Growth**	**2019**	**2020**	**Growth**
All Positions	$76,440	$80,825	↑ 5.7%	$59,409	$61,389	↑ 3.4%
General Manager/Operator	$358,461	$423,179	↑ 18.1%	$286,471	$332,484	↑ 16.1%
Sales Manager	$139,843	$151,075	↑ 8.0%	$131,809	$141,858	↑ 7.6%
F&I Manager	$154,371	$159,618	↑ 3.4%	$142,979	$148,729	↑ 4.0%
Service Manager	$134,681	$133,260	↓ 1.1%	$122,875	$125,152	↑ 1.9%
Parts Manager	$109,080	$105,701	↓ 3.1%	$98,780	$96,394	↓ 2.4%
Sales Consultant	$74,469	$81,150	↑ 8.9%	$65,125	$70,976	↑ 9.0%
Service Advisor/Writer	$71,686	$74,014	↑ 3.2%	$67,048	$69,284	↑ 3.3%
B-Service Technician	$64,208	$65,661	↑ 2.3%	$58,868	$60,553	↑ 2.9%
Parts Consultant	$54,972	$53,747	↓ 2.2%	$52,544	$51,322	↓ 2.3%

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

Non-Luxury Compared to Luxury Compensation

Inventory shortages which led to higher gross profit on units retailed in the second half of the year, led to significantly higher earnings in sales positions. Inventory shortages and gross profit increases varied by brand. New vehicle gross profit per unit increased 21 percent in non-luxury stores, compared to a 7 percent increase in luxury stores. This led to higher earnings increases in non-luxury brand dealerships.

Since most General Managers are paid on net profit, the combination of higher gross profit, staffing reductions, less advertising and lower inventory costs, led to a 24 percent increase in non-luxury General Manager compensation. In comparison, the increase in luxury store General Manager compensation was only 5 percent.

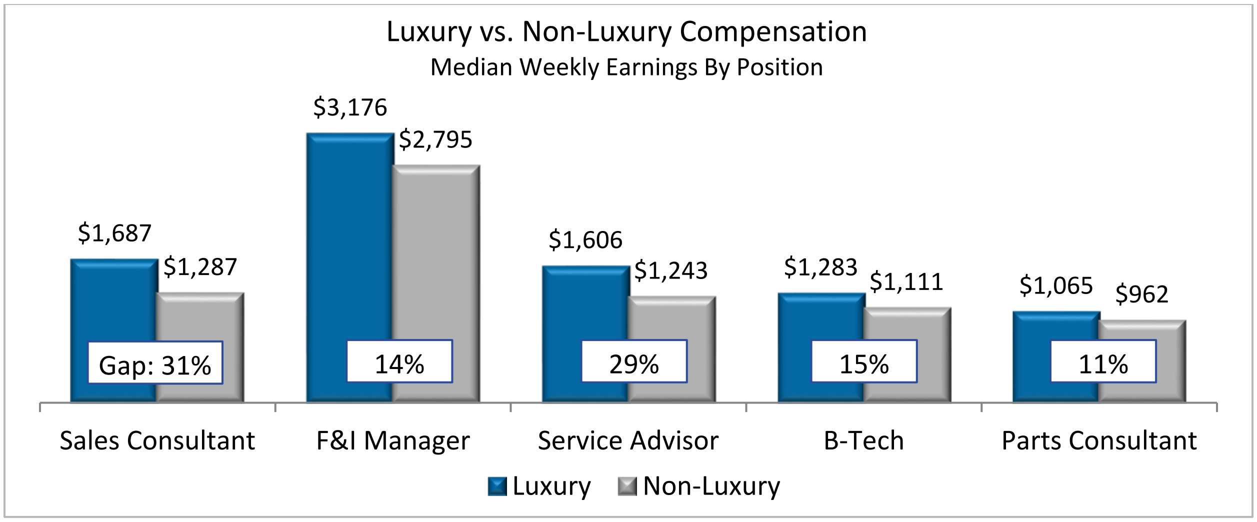
Annual Average - Cars	Non-Luxury Earnings			Luxury Earnings		
Position	**2019**	**2020**	**Growth**	**2019**	**2020**	**Growth**
All Positions	$73,222	$78,129	↑ 6.7%	$86,549	$89,197	↑ 3.1%
General Manager/Operator	$337,543	$419,635	↑ 24.3%	$412,336	$431,855	↑ 4.7%
Sales Manager	$135,281	$146,638	↑ 8.4%	$155,329	$166,098	↑ 6.9%
F&I Manager	$148,587	$155,541	↑ 4.7%	$176,985	$176,382	↓ 0.3%
Service Manager	$126,214	$126,800	↑ 0.5%	$157,592	$151,163	↓ 4.1%
Parts Manager	$104,228	$101,989	↓ 2.1%	$124,246	$117,001	↓ 5.6%
Sales Consultant	$70,200	$76,604	↑ 9.1%	$88,848	$96,757	↑ 8.9%
Service Advisor/Writer	$66,184	$68,223	↑ 3.1%	$85,658	$88,786	↑ 3.7%
B-Service Technician	$60,822	$62,752	↑ 3.2%	$71,669	$72,089	↑ 0.6%
Parts Consultant	$53,164	$52,521	↓ 1.2%	$59,832	$57,117	↓ 4.5%

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

Weekly Median - Cars	Non-Luxury Earnings			Luxury Earnings		
Data Source	**2019**	**2020**	**Growth**	**2019**	**2020**	**Growth**
All DWS Dealerships	$1,092	$1,133	↑ 3.8%	$1,321	$1,337	↑ 1.2%
DWS Same Stores	$1,099	$1,126	↑ 2.5%	$1,336	$1,338	↑ 0.1%
DWS Same Employees	$1,137	$1,180	↑ 3.8%	$1,392	$1,409	↑ 1.2%

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

Average weekly earnings in luxury dealerships are significantly higher than earnings in non-luxury dealerships. Sales consultants in luxury dealerships on average earned 31 percent more than their non-luxury counterparts. The difference between luxury and non-luxury Service Advisor earnings is also high at 29 percent.



Non-Luxury Compensation By Unit Volume

ALL-PARTICIPANTS: NATIONAL COMPENSATION – CARS – NON-LUXURY DEALERSHIPS							
Position	Overall National Average	Year Over Year Change	Overall National Median	Year Over Year Change	Low Volume Average	Medium Volume Average	High Volume Average
All Positions	**$78,129**	**↑7%**	**$58,898**	**↑4%**	**$74,592**	**$74,189**	**$81,974**
General Manager/Operator	$419,635	↑24%	$322,156	↑23%	$288,804	$343,505	$575,435
Sales Manager	$146,638	↑8%	$138,125	↑9%	$136,178	$131,741	$159,738
F&I Manager	$155,541	↑5%	$145,363	↑5%	$139,051	$138,877	$171,137
Service Manager	$126,801	↑1%	$118,610	↑2%	$111,392	$119,636	$143,376
Parts Manager	$101,989	↓ 2%	$92,872	↓1%	$85,839	$95,576	$121,108
Sales Consultant	$76,604	↑9%	$66,921	↑8%	$77,848	$71,353	$78,925
Service Advisor/Writer	$68,223	↑3%	$64,649	↑3%	$65,985	$65,979	$70,317
B-Service Technician	$62,752	↑3%	$57,749	↑4%	$60,417	$61,765	$64,156
Parts Consultant	$52,521	↓ 1%	$50,005	↓1%	$50,531	$51,258	$54,312

Low volume: < 503 units (new) Medium: 503 to 1,121 units High volume: > 1,121 units

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

SAME-STORE: NATIONAL COMPENSATION – CARS – NON-LUXURY DEALERSHIPS							
Position	**Overall National Average**	**Year Over Year Change**	**Overall National Median**	**Year Over Year Change**	**Low Volume Average**	**Medium Volume Average**	**High Volume Average**
All Positions	**$78,722**	**↑6%**	**$58,470**	**↑2%**	**$75,993**	**$73,940**	**$82,327**
General Manager/Operator	$451,406	↑35%	$340,532	↑30%	$316,008	$352,962	$616,074
Sales Manager	$147,343	↑8%	$137,823	↑9%	$139,444	$129,730	$159,438
F&I Manager	$157,240	↑5%	$147,247	↑6%	$134,963	$139,739	$172,752
Service Manager	$131,298	↑1%	$124,093	↑3%	$114,538	$122,939	$147,213
Parts Manager	$107,248	↑0%	$97,883	↑0%	$90,641	$98,887	$126,212
Sales Consultant	$75,163	↑5%	$65,759	↑5%	$77,944	$69,552	$76,952
Service Advisor/Writer	$67,810	↑1%	$64,475	↑1%	$66,305	$66,075	$69,195
B-Service Technician	$61,795	↑1%	$57,023	↑2%	$61,004	$61,340	$62,343
Parts Consultant	$52,260	↓2%	$49,967	↓2%	$50,056	$51,452	$53,549

Low volume: < 503 units (new) Medium: 503 to 1,121 units High volume: > 1,121 units

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

SAME-EMPLOYEES: NATIONAL COMPENSATION – CARS – NON-LUXURY DEALERSHIPS							
Position	**Overall National Average**	**Year Over Year Change**	**Overall National Median**	**Year Over Year Change**	**Low Volume Average**	**Medium Volume Average**	**High Volume Average**
All Positions	$83,298	↑9%	$61,366	↑4%	$81,018	$77,765	$86,693
General Manager/Operator	$509,291	↑30%	$403,635	↑35%	$354,002	$360,547	$717,905
Sales Manager	$159,369	↑7%	$149,518	↑16%	$140,820	$135,183	$174,246
F&I Manager	$174,769	↑5%	$164,817	↑12%	$141,424	$156,508	$193,848
Service Manager	$140,446	↑2%	$134,994	↑8%	$123,450	$130,858	$157,459
Parts Manager	$115,889	0%	$105,000	↑1%	$97,751	$105,990	$132,623
Sales Consultant	$82,611	↑8%	$72,618	↑8%	$87,677	$76,349	$83,684
Service Advisor/Writer	$73,334	↑1%	$69,349	↑6%	$70,691	$72,510	$74,555
B-Service Technician	$62,595	↓3%	$57,887	↑1%	$61,991	$62,384	$63,098
Parts Consultant	$54,809	↓4%	$52,809	↓3%	$49,224	$55,267	$55,425

Low volume: < 503 units (new) Medium: 503 to 1,121 units High volume: > 1,121 units

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

Luxury Compensation By Unit Volume

ALL-PARTICIPANTS: NATIONAL COMPENSATION – CARS – LUXURY DEALERSHIPS						
Position	**Overall National Average**	**Year Over Year Change**	**Overall National Median**	**Year Over Year Change**	**Low Volume Average**	**High Volume Average**
All Positions	**$89,197**	**↑3%**	**$69,518**	**↑1%**	**$85,680**	**$90,709**
General Manager/Operator	$423,179	↑3%	$355,526	↑1%	$355,813	$487,388
Sales Manager	$166,098	↑7%	$158,086	↑6%	$146,815	$175,193
F&I Manager	$176,382	0%	$165,134	↓2%	$149,705	$186,800
Service Manager	$151,163	↓4%	$146,833	0%	$133,115	$160,827
Parts Manager	$117,001	↓6%	$109,400	↓4%	$101,378	$126,657
Sales Consultant	$96,757	↑9%	$87,709	↑11%	$91,448	$99,093
Service Advisor/Writer	$88,786	↑4%	$83,521	↑4%	$83,424	$91,093
B-Service Technician	$72,089	↑1%	$66,710	↑1%	$70,267	$72,814
Parts Consultant	$57,117	↓4%	$55,355	↓4%	$53,732	$58,497

Low volume: < 595 units (new) High volume: > 595 units
(↑) Represent year-over-year <u>increases</u> or *favorable* changes; (↓) represent unfavorable changes

SAME-STORE: NATIONAL COMPENSATION – CARS – LUXURY DEALERSHIPS						
Position	**Overall National Average**	**Year Over Year Change**	**Overall National Median**	**Year Over Year Change**	**Low Volume Average**	**High Volume Average**
All Positions	**$89,174**	**↑2%**	**$69,513**	**↑1%**	**$85,284**	**$90,861**
General Manager/Operator	$462,290	↑12%	$375,902	↑7%	$354,247	$553,556
Sales Manager	$165,242	↑5%	$159,902	↑4%	$145,840	$174,251
F&I Manager	$179,736	0%	$167,201	↓1%	$148,855	$191,674
Service Manager	$156,467	↓1%	$148,304	0%	$136,242	$167,291
Parts Manager	$120,506	↓4%	$112,284	↓2%	$102,502	$132,272
Sales Consultant	$96,834	↑7%	$88,222	↑7%	$90,254	$99,656
Service Advisor/Writer	$88,527	↑1%	$83,116	↑1%	$83,263	$90,743
B-Service Technician	$70,963	↓3%	$65,650	↓2%	$70,553	$71,124
Parts Consultant	$57,258	↓5%	$56,058	↓4%	$53,995	$58,626

Low volume: < 595 units (new) High volume: > 595 units
(↑) Represent year-over-year <u>increases</u> or *favorable* changes; (↓) represent unfavorable changes

SAME-EMPLOYEES: NATIONAL COMPENSATION – CARS – LUXURY DEALERSHIPS						
Position	**Overall National Average**	**Year Over Year Change**	**Overall National Median**	**Year Over Year Change**	**Low Volume Average**	**High Volume Average**
All Positions	**$94,642**	**↑5%**	**$73,272**	**↑1%**	**$89,718**	**$96,425**
General Manager/Operator	$568,586	↑16%	$506,638	↑23%	$419,685	$653,474
Sales Manager	$177,215	↑3%	$169,852	↑3%	$147,225	$187,128
F&I Manager	$200,557	0%	$191,778	0%	$164,198	$213,165
Service Manager	$170,431	↑1%	$165,368	0%	$150,747	$179,903
Parts Manager	$126,467	↓4%	$118,359	↑10%	$108,702	$137,099
Sales Consultant	$105,934	↑7%	$97,282	↑3%	$97,390	$109,221
Service Advisor/Writer	$96,077	↑1%	$89,602	0%	$89,677	$98,324
B-Service Technician	$70,320	↓7%	$65,201	↓12%	$70,563	$70,228
Parts Consultant	$59,462	↓7%	$58,380	↓3%	$55,986	$60,451

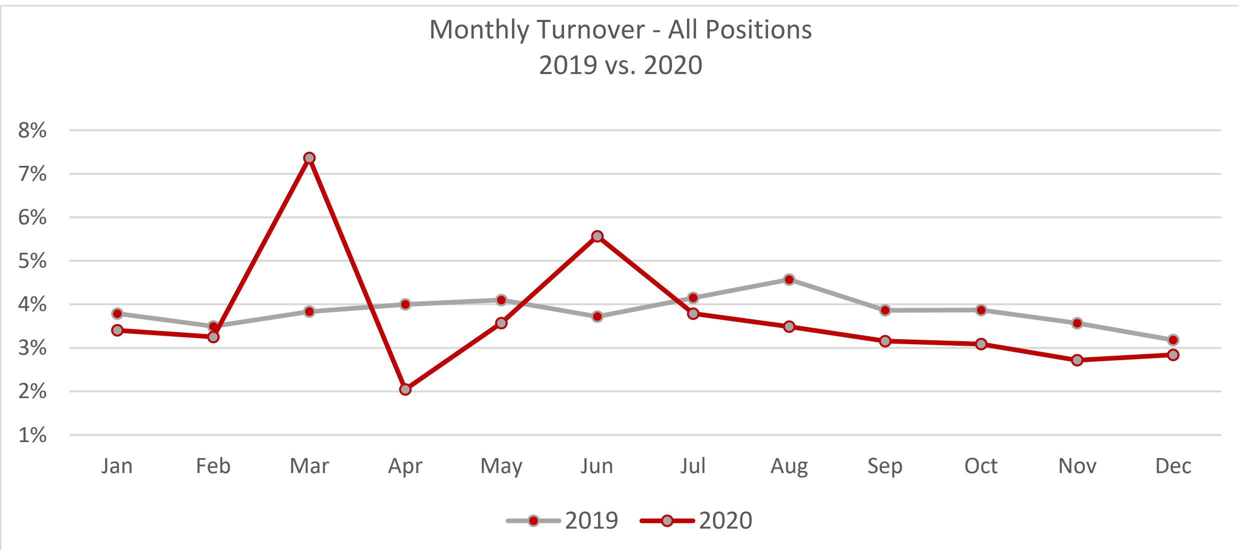
Low volume: < 595 units (new) High volume: > 595 units

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

Retention and Turnover Trends

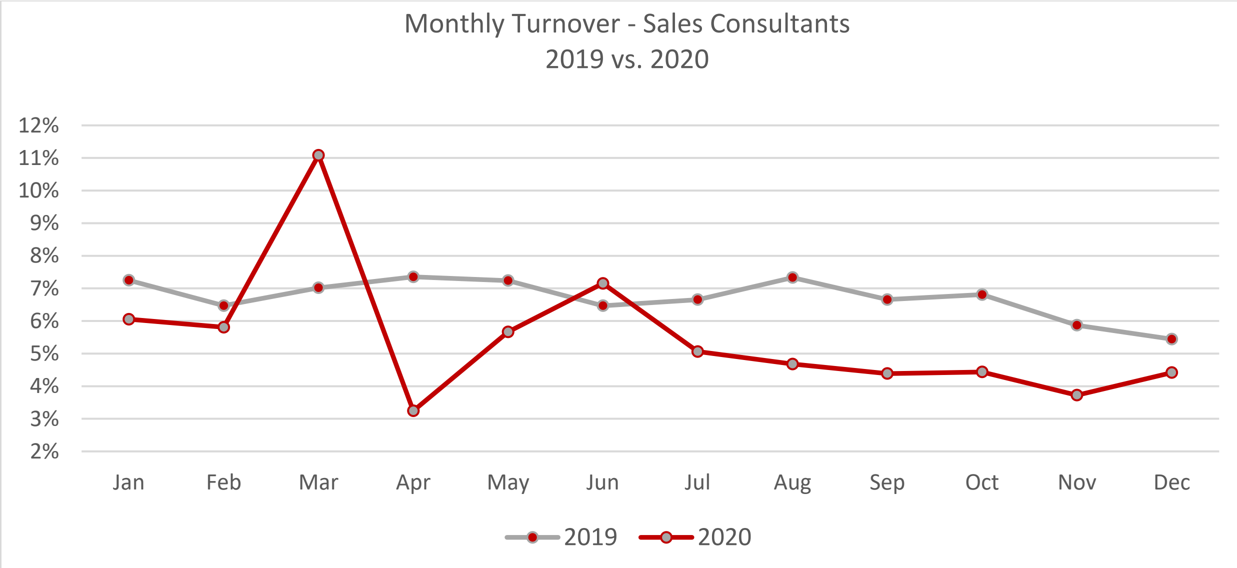
Total employee turnover across the entire year in 2020 was 46 percent, which is the same as total turnover in 2019. Due to the Pandemic, the participants in this year's Study had to furlough 16 percent of their employees for periods from several weeks to several months. As a result, we had to look at monthly turnover to understand the impact of employee furloughs.[8]

Monthly turnover in 2019 was level at 46 percent on an annualized basis. In 2020, monthly turnover was very uneven in the first half of the year, averaging 50 percent annualized. In the second half of the year monthly turnover leveled out at an annualized rate of 38 percent.



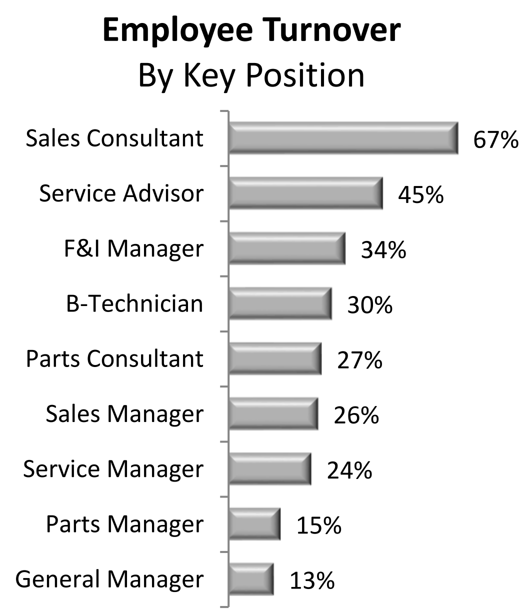
8 Furloughs are not counted as terminations until the employee decides not to come back to work or the dealership decides not to call them back to work.

In 2020, total annualized sales consultant turnover was 78 percent in the first half and dropped to an annual rate of 53 percent in the second half of 2020, a 24 point drop compared to the second half of 2019.



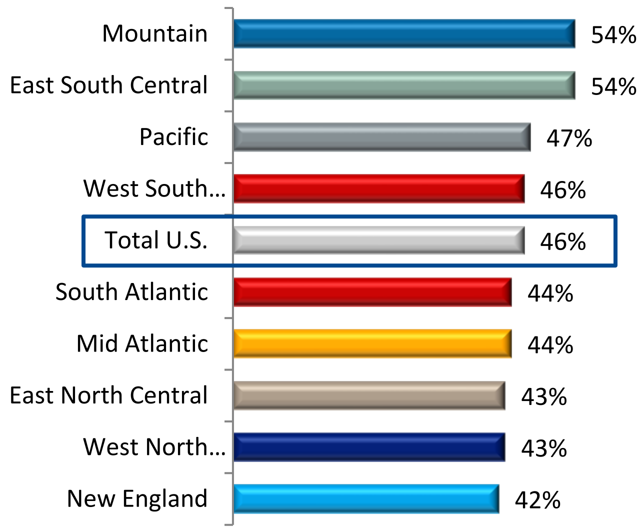
Total dealership employee turnover in 2020 did not change from 2019 at 46 percent. The 2020 BLS estimate of employee turnover (total separations) in the non-farm private sector was 57 percent – a seven point increase compared to 2019.[9]

Turnover decreased in five out of nine key dealership positions. General Manager, Sales Manager and F&I Manager turnover each decreased six or seven points. Sales consultants had the largest decrease in turnover dropping 13 points year-over-year to 67 percent. Sales consultant turnover dropped 15 points to 72 percent in non-luxury dealerships, while sales consultant turnover in luxury dealerships dropped seven points to 47 percent. Service advisor turnover dropped three points to 45 percent and service technician turnover increased two points to 30 percent. Sales consultants and service advisors still have the highest turnover out of the nine key positions.



9 U.S. Bureau of Labor Statistics - Job Openings and Labor Turnover Survey Data 2020.

Total Employee Turnover
By Region



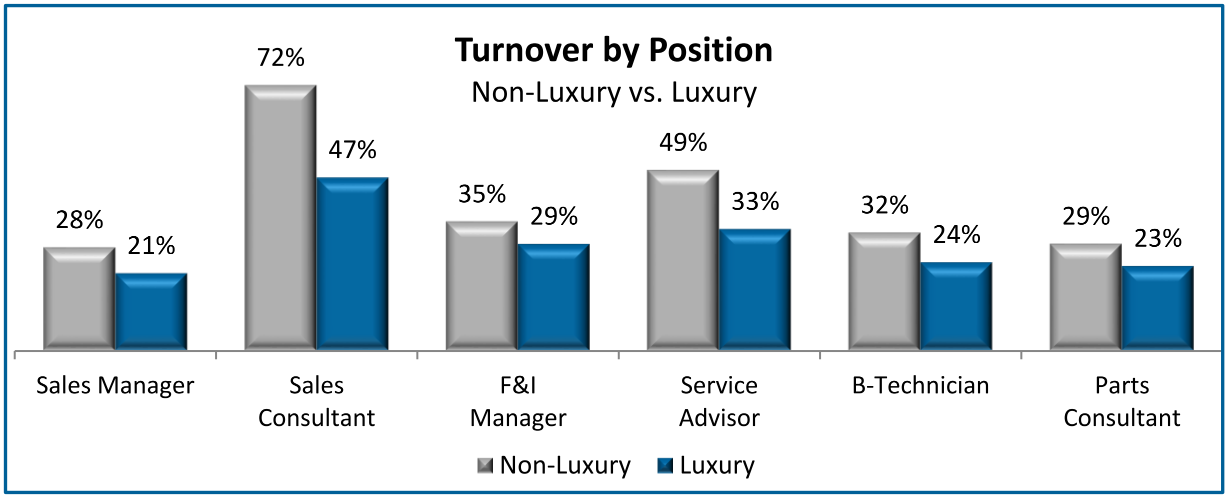
Turnover varied significantly by region from a high of 54 percent in the East South Central and Mountain regions to a low of 42 percent in the New England region.

NATIONAL RETENTION AND TURNOVER – CARS – ALL DEALERSHIPS					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**46%**	**0%**	**77%**	**51%**	**3.1**
General Manager/Operator	13%	↓6%	93%	79%	11.6
Sales Manager	26%	↓7%	85%	62%	4.5
F&I Manager	34%	↓7%	82%	56%	3.6
Service Manager	24%	0%	88%	70%	6.0
Parts Manager	15%	↑2%	93%	81%	10.9
Sales Consultant	67%	↓13%	69%	39%	2.1
Service Advisor/Writer	45%	↓3%	76%	47%	2.7
B-Service Technician	30%	↑2%	84%	60%	4.0
Parts Consultant	27%	↑5%	85%	65%	5.1

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

Staffing reductions led to significant increases in employee retention rates and median tenure. Median tenure increased from 2.5 to 3.1 years. One-year retention increased five points to 77 percent and three-year retention increased five points to 51 percent.

Employee turnover continues to be significantly higher in non-luxury dealerships compared to luxury dealerships. Total employee turnover increased three points to 38 percent in luxury dealerships and remained unchanged at 49 percent in non-luxury dealerships. The largest differences by position can be seen in sales consultant and service advisor turnover.



Employee turnover dropped in six of nine key positions in non-luxury dealerships. Sales consultants had the biggest decrease in turnover, dropping 15 points to 72 percent. Sales consultant and service advisor turnover remain the highest turnover positions. Parts consultant turnover increased seven points to 29 percent, the highest increase out of nine key positions.

NATIONAL RETENTION AND TURNOVER – CARS – NON-LUXURY DEALERSHIPS

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**49%**	**0%**	**76%**	**49%**	**2.9**
General Manager/Operator	14%	↓8%	93%	77%	8.9
Sales Manager	28%	↓8%	85%	61%	4.4
F&I Manager	35%	↓8%	82%	57%	3.7
Service Manager	25%	↓1%	87%	67%	5.6
Parts Manager	17%	↑3%	93%	80%	10.8
Sales Consultant	72%	↓15%	67%	38%	1.9
Service Advisor/Writer	49%	↓4%	74%	44%	2.4
B-Service Technician	32%	↑1%	83%	58%	3.9
Parts Consultant	29%	↑7%	85%	64%	4.9

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

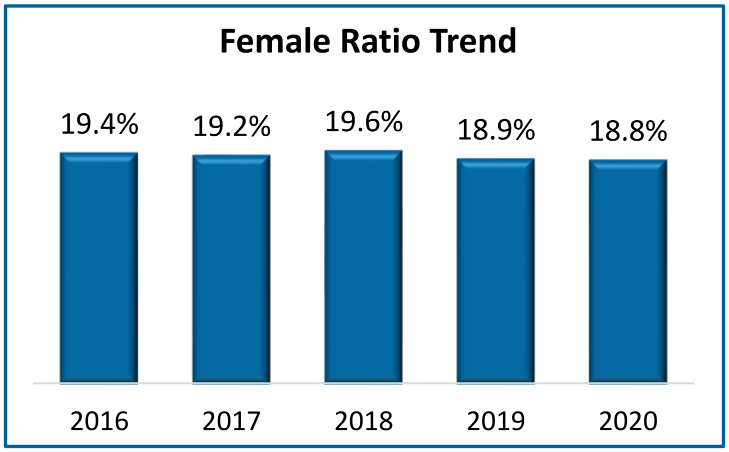
Annualized employee turnover increased in six out of nine key positions in luxury dealerships. Sales manager, F&I manager and sales consultant were the only positions with decreasing turnover in luxury dealerships. The biggest decrease was in sales consultant turnover which dropped seven points to 47 percent. Parts consultants had a highest turnover increase of six points to 23 percent.

NATIONAL RETENTION AND TURNOVER – CARS – LUXURY DEALERSHIPS					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**38%**	↑3%	**80%**	**55%**	**3.6**
General Manager/Operator	13%	↑3%	94%	82%	10.8
Sales Manager	21%	↓2%	87%	66%	4.6
F&I Manager	29%	↓6%	81%	55%	3.6
Service Manager	21%	↑4%	92%	77%	6.9
Parts Manager	12%	↑2%	95%	85%	11.5
Sales Consultant	47%	↓7%	74%	44%	2.5
Service Advisor/Writer	33%	↑2%	82%	56%	2.6
B-Service Technician	24%	↑4%	86%	62%	4.2
Parts Consultant	23%	↑6%	87%	68%	5.5

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

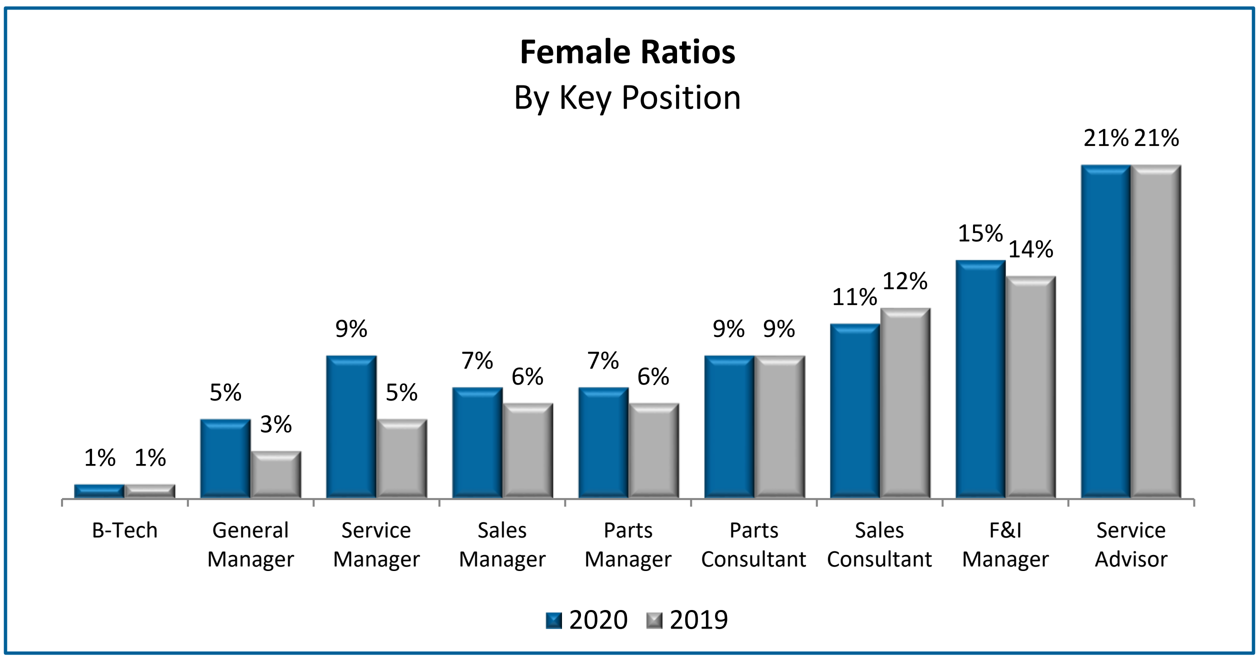
Demographic Statistical Comparisons

The Gender Gap



At the end of 2020, only 18.8 percent of active employees in new car dealerships were women — statistically no change compared to 2019. Despite increasing efforts by OEMs, dealer groups and "Women in Automotive" to attract and recruit more women, the percentage of females hired by dealerships in 2020 showed no change since 2019 at 21 percent of new hires.

Among the nine key positions, Service Advisors still have the highest ratio of women at 21 percent, followed by F&I Managers at 15 percent. The Service Manager female ratio had the highest year-over-year increase, moving up 4 points from 5 percent in 2019 to 9 percent in 2020.

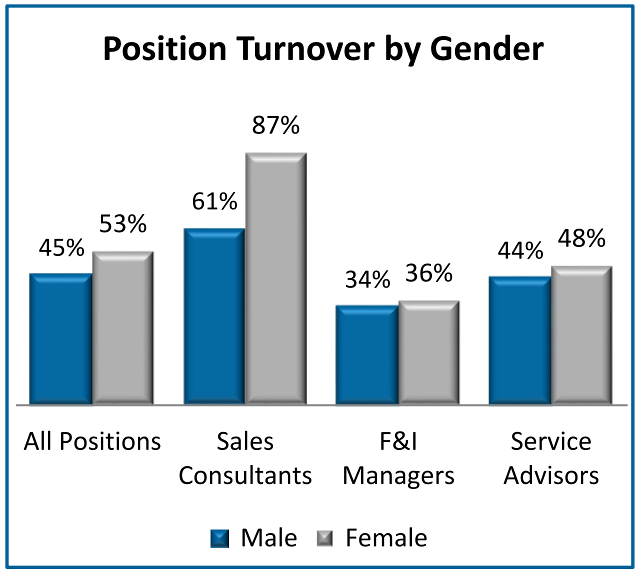


Luxury dealerships, with a female ratio of 17 percent, employed fewer women than non-luxury dealerships, whose staff was 19 percent female. These ratios have not changed since 2017.

Turnover by Gender

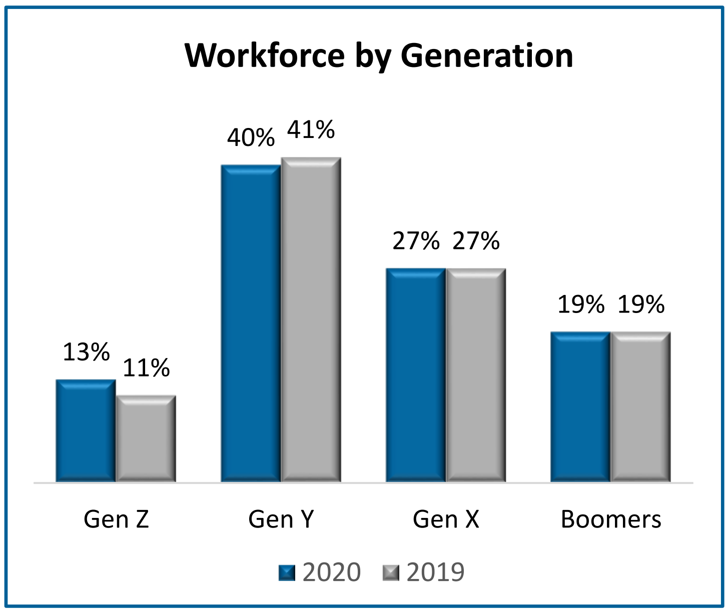
Female employee turnover across all positions in new-car dealerships in 2020 was unchanged at 53 percent— 8 points higher than the male turnover rate of 45 percent.

Female turnover in the sales consultant position dropped 25 points in 2020 from 112 percent to 87 percent. At 87 percent, turnover among female sales consultants is still 26 points higher than turnover for male sales consultants. In other key positions, such as service advisor, male and female turnover only had a four point difference.



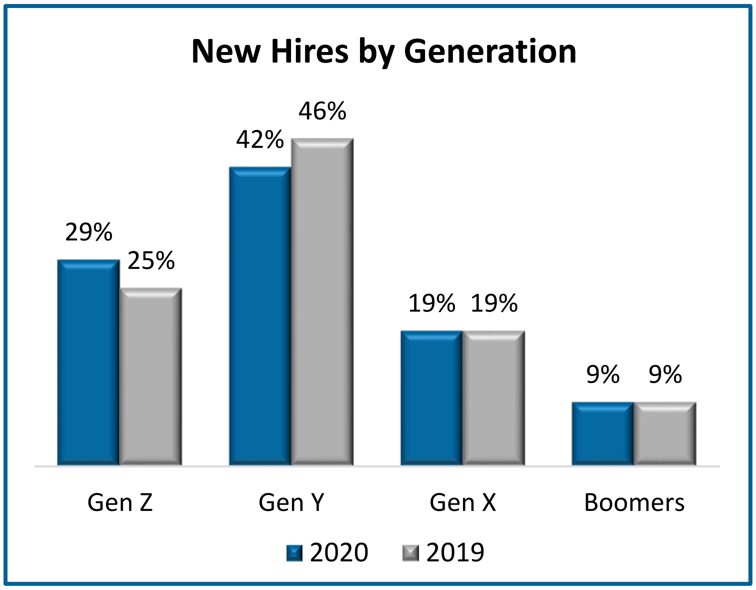
Generational Differences

The generational composition of the 2020 dealership workforce changed very little compared to 2019. The number of Generation Z employees being hired and employed by dealerships continues to increase. Just 13 percent of active employees were ages 23 and younger as of December 31, 2020. This is right in line with data taken from the U.S. Bureau of Labor Statistics (BLS) 2020 Current Population Survey.



The median age of all dealership employees was relatively unchanged at 38.4 years. The median age of non-luxury dealership employees was 38.4 years compared to a median of 38.2 years in luxury dealerships. On average, employees working in U.S. car dealerships are four years younger than the median age of 42.0 years for the U.S. non-farm private-sector workforce, according to the BLS 2020 Current Population Survey.[10]

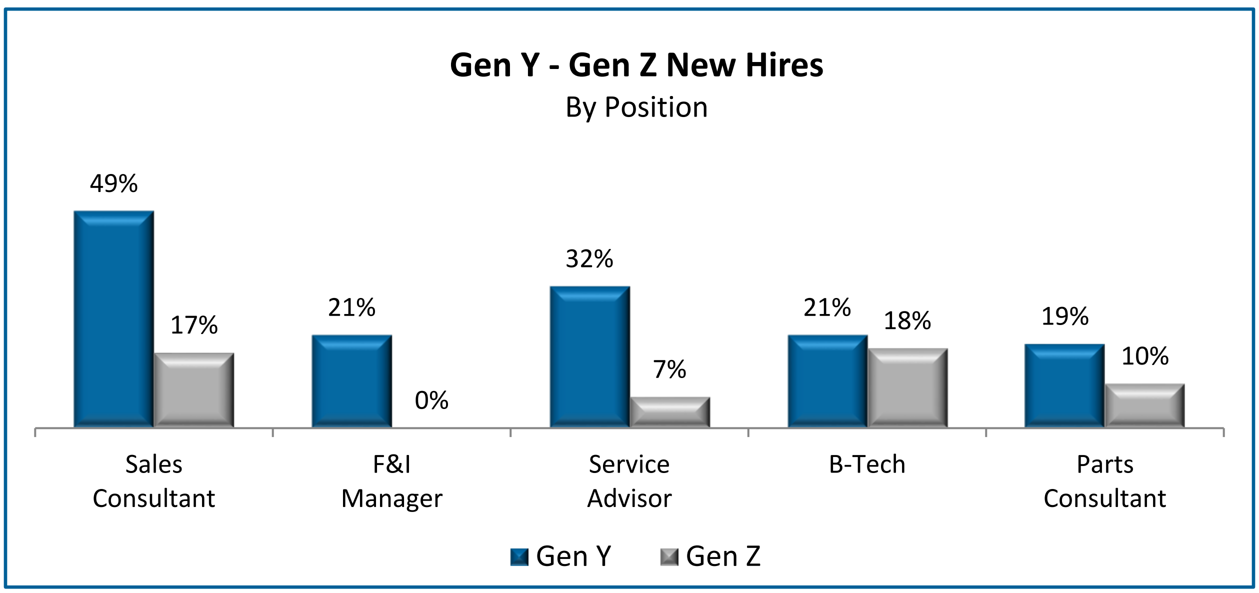
10 US BLS CPS 2020 Median age of the labor force, by sex, race, and ethnicity



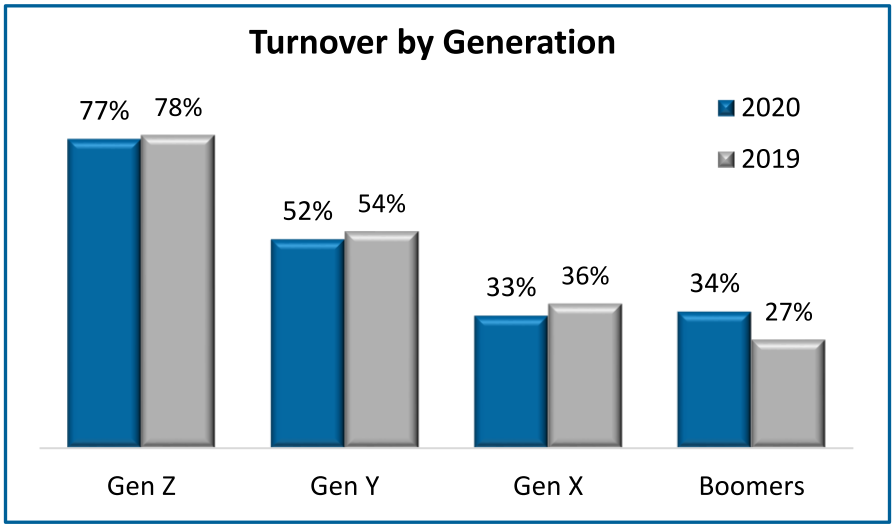
The percentage of Gen Z employees hired by new-car dealerships in 2020 increased 4 points to 29 percent as Gen Y (Millennials) dropped 4 points to 42 percent of all new hires.

A relatively low number of Gen Z employees were hired for production positions. Dealerships hired almost three times more Millennials for sales consultant positions than Gen Z new hires.

In contrast, service technician jobs were filled with almost equal numbers of Gen Y and Gen Z employees.



The levels of turnover by generation in 2020 changed very little compared to 2019 turnover. Turnover in Boomer generation employees increased by 7 points compared to small turnover decreases in the three younger generations. The increasing turnover in Boomers is most likely related to retirements. The higher levels of turnover in Gen Y and Gen Z employees is still being driven by these three factors — poorly defined career paths, commission-based pay plans, and working long hours and weekends.



Medium and Heavy Duty Truck Dealerships

The number of participating medium and heavy truck dealerships increased 40 percent to 171 dealerships. Even with the increase in participation, we still do not have enough data to conduct an in-depth analysis similar to that for car and light-truck dealerships. The statistics and trends reported here are based on somewhat limited payroll data and information for some of the key positions and regions is not available because we don't have a statistically valid sample.[11]

Size of Participating Dealerships

The average medium- and heavy-duty truck head count for truck dealerships participating in the Study decreased from 67 employees in 2019 to 60 employees in 2020. Truck dealerships reduced average headcounts 10 percent by year-end, the same staffing reduction as car dealerships in the Study.

Compensation Trends

The 2020 weekly earnings average across all truck dealership positions in the Study was $1,362 – a two percent increase compared to last year's Study.

The median weekly earnings for truck dealership employees increased three percent to $1,136 – 18 percent higher than the 2020 fourth-quarter median weekly earnings of $966 for the U.S. non-farm private-sector workforce.[12]

	Average Weekly Earnings			Median Weekly Earnings		
Data Resource	**2019**	**2020**	**Growth**	**2019**	**2020**	**Growth**
All Truck Dealerships	$1,337	$1,362	↑ 1.8%	$1,103	$1,136	↑ 3.0%
Truck Same Stores	$1,344	$1,317	↓ 2.0%	$1,111	$1,100	↓ 1.0%
BLS U.S. Private Sector	$963	$1,014	↑ 5.3%	$917	$966	↑5.3%

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

Among key dealership positions, an increase in average earnings was posted in five out of eight job titles. General manager average earnings had the greatest increase at 9.3 percent, while service manager average earnings decreased by 3.3 percent. Service advisor and service technician average earnings increased 4.0 percent and 4.8 percent, respectively.

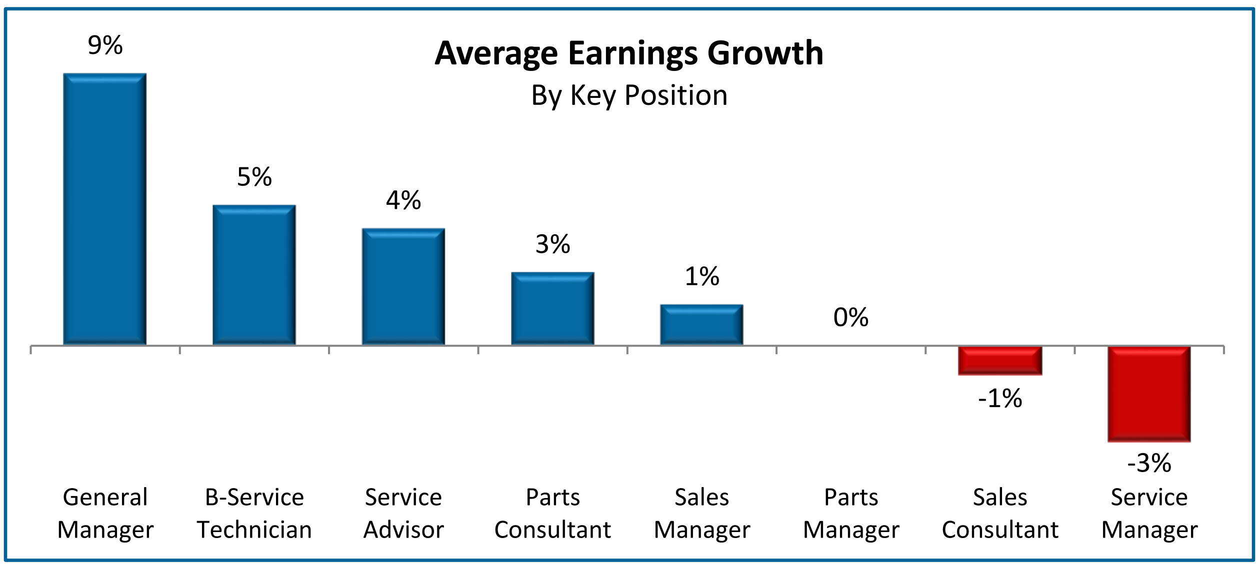
Sales manager, service manager and parts manager median earnings each decreased 6.5 percent, 5.8 percent and 3.4 percent, respectively.

11 We had insufficient data to break out statistics for F&I Managers.

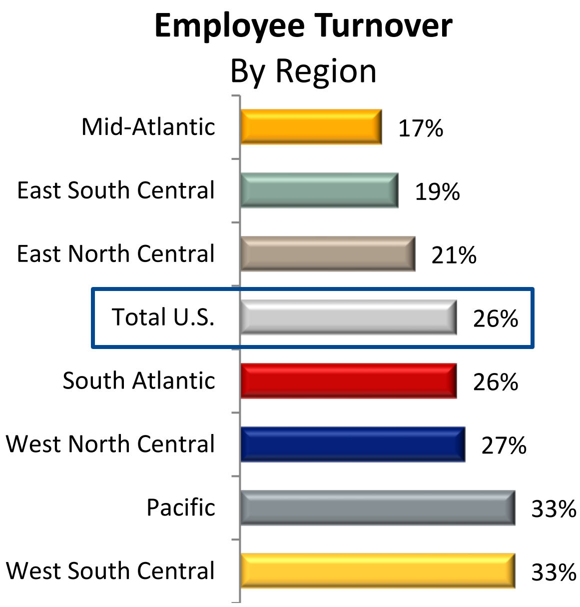
12 US Bureau of Labor Statistics – 2020 median weekly earnings of all private sector full-time wage and salary workers based on the average of 1st and 4th quarters. Comparisons to BLS 2020 weekly earnings should be interpreted with caution due to pandemic-related employment changes. As unemployment among lower-paid workers increased, average and median earnings for higher-paid employed workers showed an increase.

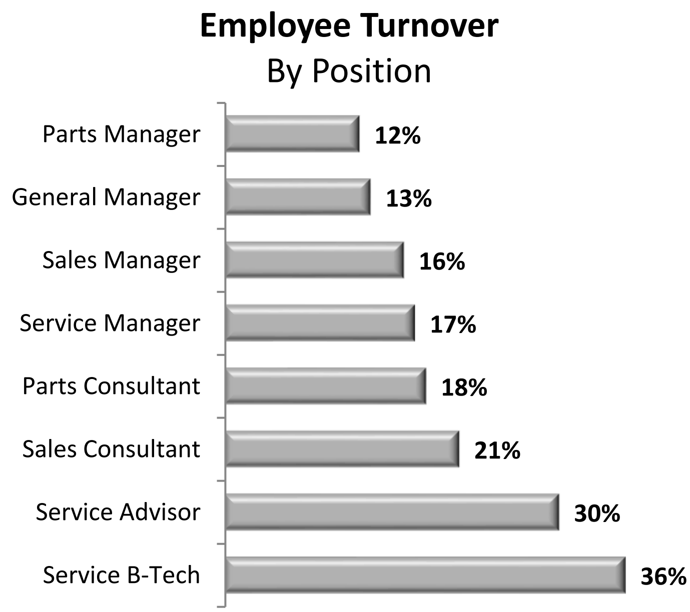
All Truck Dealers	Average Annual Earnings			Median Annual Earnings		
Position	2019	2020	Growth	2019	2020	Growth
All Positions	$69,517	$70,812	↑ 1.8%	$57,364	$59,049	↑ 2.9%
General Manager/Operator	$172,880	$188,931	↑ 9.3%	$144,410	$157,354	↑ 9.0%
Sales Manager	$153,737	$155,840	↑ 1.4%	$144,410	$135,378	↓ 6.5%
Service Manager	$99,126	$95,920	↓ 3.3%	$95,753	$90,358	↓ 5.8%
Parts Manager	$94,517	$94,310	↓ 0.2%	$89,808	$86,824	↓ 3.4%
Sales Consultant	$125,369	$124,052	↓ 1.1%	$98,035	$99,048	↑ 1.0%
Service Advisor/Writer	$55,220	$57,448	↑ 4.0%	$53,302	$55,200	↑ 3.6%
Service Technician	$59,893	$62,769	↑ 4.8%	$57,565	$60,040	↑ 4.3%
Parts Consultant	$55,679	$57,050	↑ 2.5%	$53,389	$54,849	↑ 2.7%

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

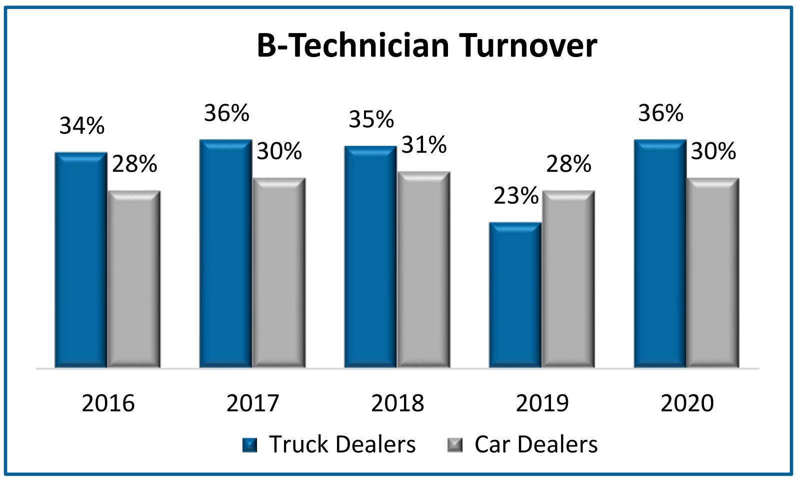


Retention and Turnover Trends





Total employee turnover in truck dealerships increased three points to 26 percent. At the national level, the position with the highest annualized turnover rate was Service B-Technician at 36 percent, an estimated increase of 13 points. However, the five-year trend in technician turnover indicates that this may not be an accurate estimate of the year-over-year change actually experienced by truck dealers.[13]



Looking back at technician turnover in truck dealerships over the past five years shows consistently higher turnover compared to car dealerships. Truck technician turnover has averaged 35 percent compared to a 29 percent average in new car technician turnover – a six point difference.

13 Truck dealership participation dropped 31 percent last year, increasing the margin of error in the 2019 workforce statistics. Truck dealership participation rebounded this year by 40 percent providing a higher level of confidence and lower margin of error.

ATD's 20 Group consultants have identified several factors driving higher truck technician turnover compared to car technician turnover.

More Baby Boomer technicians are choosing to retire or move into other positions because of physical limitations from being a long-time truck technician.

The talent pool to replace or develop new technicians is drying up and very little is being done to encourage high schoolers to consider this profession.

Stricter drug testing requirements for a Commercial Driver's License, including marijuana testing, further reduces the talent pool, while encouraging technician retirements and career changes.

Competition from outside the truck industry for technicians is fierce. Dealers lose technicians to state and provincial government entities, municipalities, public utilities, and like industries which do not have the time stresses and performance demands placed on truck technicians.

Median tenure for all truck positions increased from 4.0 to 4.3 years, although employees in many of the key positions stayed longer. Average one-year retention increased 5 points to 85 percent, while the average three-year retention increased 3 points to 59 percent.

NATIONAL RETENTION AND TURNOVER – TRUCKS – ALL DEALERSHIPS

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**26%**	**↑ 3%**	**85%**	**59%**	**4.3**
General Manager/ Operator	13%	↑ 5%	92%	72%	7.3
Sales Manager	16%	↑ 5%	96%	73%	8.7
Service Manager	17%	↑ 3%	90%	72%	6.7
Parts Manager	12%	↑ 4%	92%	77%	8.4
Sales Consultant	21%	↑ 6%	88%	68%	5.6
Service Advisor/Writer	30%	↑ 6%	79%	49%	2.9
B-Service Technician	36%	↑ 13%	81%	51%	3.2
Parts Consultant	18%	↑ 3%	88%	64%	5.2

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

V. NADA Average Dealer Profile Series

The NADA ADP Profile series examines financial trends in the overall average U.S. light-vehicle dealership, the average import dealership, the average domestic dealership, the average luxury dealership and the average mass market dealership. The brands represented in each section are listed below each table. More information can be found at nada.org/dealershipfinancialprofile/.

Compensation Comparisons

ADP SERIES: AVERAGE COMPENSATION, ALL BRANDS

Position	Overall National Average	Year Over Year Change	Overall National Median	Year Over Year Change	Low Volume Average	Medium Volume Average	High Volume Average
All Positions	**$81,399**	**↑5.6%**	**$61,822**	**↑3.1%**	**$77,606**	**$79,321**	**$84,225**
General Manager/Operator	$433,803	↑17.3%	$337,362	↑14.7%	$320.229	$382,578	$564,110
Sales Manager	$151,683	↑8.2%	$142,111	↑7.3%	$134,352	$142,965	$164,332
F&I Manager	$160,378	↑2.9%	$148,875	↑3.1%	$136,043	$147,412	$176,144
Service Manager	$135,534	↓1.1%	$127,473	↑2.2%	$115,059	$133,518	$150,014
Parts Manager	$107,118	↓3.5%	$98,643	↓2.2%	$87,387	$105,131	$123,353
Sales Consultant	$81,486	↑8.3%	$71,324	↑8.2%	$80,288	$78,847	$83,501
Service Advisor/Writer	$74,884	↑3.2%	$70,191	↑2.9%	$72,478	$75,047	$75,675
B-Service Technician	$65,055	↑0.6%	$60,875	↑2.7%	$64,017	$66,150	$66,754
Parts Consultant	$54,139	↓2.5%	$51,761	↓2.6%	$50,112	$54,422	$55,610

Low volume: < 503 units (new) Medium: 503 to 1,121 units High volume: > 1,121 units

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

ADP SERIES: COMPENSATION, DOMESTIC BRANDS

Position	Overall National Average	Year Over Year Change	Overall National Median	Year Over Year Change	Low Volume Average	Medium Volume Average	High Volume Average
All Positions	**$78,086**	**↑7.1%**	**$58,183**	**↑2.9%**	**$76,373**	**$73,941**	**$82,877**
General Manager/Operator	$388,439	↑25.7%	$292,578	↑16.7%	$294,774	$365,512	$540,024
Sales Manager	$145,628	↑9.8%	$138,615	↑12.0%	$139,540	$132,781	$160,256
F&I Manager	$154,825	↑5.5%	$145,530	↑7.8%	$135,185	$145,859	$173,737
Service Manager	$124,635	↑0.8%	$116,375	↑1.8%	$111,479	$120,494	$145,466
Parts Manager	$102,216	↑0.4%	$92,195	↑2.4%	$89,218	$97,757	$126,540
Sales Consultant	$77,383	↑10.4%	$67,198	↑10.0%	$81,573	$71,604	$78,897
Service Advisor/Writer	$67,655	↑2.2%	$64,048	↑2.1%	$64,980	$66,462	$70,767
B-Service Technician	$62,071	↑1.1%	$56,620	↑2.4%	$60,766	$61,532	$63,604
Parts Consultant	$53,016	↓2.4%	$50,678	↑0.2%	$50,014	$52,096	$56,214

Buick/GMC, Chevrolet, Chrysler/Jeep/Dodge, FIAT, Ford

Low volume: < 503 units (new) Medium: 503 to 1,121 units High volume: > 1,121 units

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

ADP SERIES: COMPENSATION, IMPORT BRANDS							
Position	Overall National Average	Year Over Year Change	Overall National Median	Year Over Year Change	Low Volume Average	Medium Volume Average	High Volume Average
All Positions	**$82,579**	**↑4.9%**	**$63,040**	**↑3.2%**	**$78,345**	**$81,555**	**$84,482**
General Manager/Operator	$449,512	↑14.7%	$355,214	↑13.4%	$325,920	$387,959	$577,055
Sales Manager	$154,770	↑7.4%	$144,124	↑5.3%	$133,854	$148,381	$165,296
F&I Manager	$162,395	↑1.8%	$150,509	↑1.5%	$136,361	$149,079	$176,304
Service Manager	$138,157	↓2.6%	$130,043	↓0.2%	$114,999	$137,409	$150,628
Parts Manager	$108,780	↓4.7%	$101,690	↓26.5%	$87,281	$106,122	$123,639
Sales Consultant	$83,272	↑8.2%	$73,350	↑8.1%	$80,315	$82,328	$84,656
Service Advisor/Writer	$76,911	↑3.4%	$69,773	0%	$76,283	$77,426	$76,777
B-Service Technician	$67,366	↑2.7%	$62,400	↑2.9%	$66,267	$67,984	$67,334
Parts Consultant	$54,022	↓2.4%	$51,556	↓3.5%	$49,910	$54,318	$55,155

Acura, Audi, BMW, Honda, Hyundai, Infiniti, Jaguar, Land Rover, Lexus, Mercedes-Benz, MINI, Mitsubishi, Nissan, Porsche, Subaru, Toyota/Scion, Volkswagen, Volvo

Low volume: < 503 units (new) Medium: 503 to 1,121 units High volume: > 1,121 units

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

ADP SERIES: COMPENSATION, MASS MARKET BRANDS							
Position	Overall National Average	Year Over Year Change	Overall National Median	Year Over Year Change	Low Volume Average	Medium Volume Average	High Volume Average
All Positions	**$78,150**	**↑6.7%**	**$58,692**	**↑3.7%**	**$74,204**	**$74,189**	**$81,974**
General Manager/Operator	$420,951	↑24.7%	$323,101	↑23.1%	$291,808	$343,505	$575,435
Sales Manager	$146,406	↑8.2%	$137,663	↑8.5%	$133,878	$131,741	$159,738
F&I Manager	$154,915	↑4.3%	$144,338	↑4.7%	$132,451	$138,877	$171,137
Service Manager	$126,458	↑0.2%	$117,598	↑1.2%	$108,076	$119,636	$143,376
Parts Manager	$102,229	↓1.9%	$93,282	↓0.8%	$84,791	$95,576	$121,108
Sales Consultant	$76,466	↑8.9%	$66,850	↑8.4%	$77,157	$71,353	$78,925
Service Advisor/Writer	$68,088	↑2.9%	$64,546	↑2.9%	$65,190	$65,979	$70,317
B-Service Technician	$62,764	↑3.2%	$57,790	↑4.2%	$60,450	$61,765	$64,156
Parts Consultant	$52,260	↓1.7%	$49,768	↓1.2%	$48,748	$51,258	$54,312

Buick/GMC, Chevrolet, Chrysler/Jeep/Dodge, FIAT, Ford, Honda, Hyundai, Kia, Mazda, MINI, Mitsubishi, Nissan, Subaru, Toyota/Scion, Volkswagen

Low volume: < 503 units (new) Medium: 503 to 1,121 units High volume: > 1,121 units

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

ADP SERIES: COMPENSATION, LUXURY BRANDS						
Position	Overall National Average	Year Over Year Change	Overall National Median	Year Over Year Change	Low Volume Average	High Volume Average
All Positions	**$89,178**	**↑3.1%**	**$69,508**	**↑1.2%**	**$85,599**	**$90,709**
General Manager/Operator	$431,600	↑4.7%	$355,034	↑0.6%	$354,773	$487,388
Sales Manager	$165,880	↑6.9%	$159,267	↑6.7%	$145,977	$175,193
F&I Manager	$176,701	↓0.3%	$165,523	↓1.9%	$150,445	$186,800
Service Manager	$151,338	↓3.9%	$146,966	↓0.3%	$133,380	$160,827
Parts Manager	$117,081	↓5.8%	$109,400	↓4.7%	$101,478	$126,657
Sales Consultant	$96,749	↑9.0%	$87,769	↑11.2%	$91,390	$99,093
Service Advisor/Writer	$88,808	↑3.6%	$83,547	↑3.7%	$83,463	$91,093
B-Service Technician	$72,085	↑0.6%	$66,637	↑0.7%	$70,245	$72,814
Parts Consultant	$57,117	↓4.5%	$55,355	↓4.1%	$53,732	$58,497

Acura, Aston Martin, Audi, Bentley, BMW, Cadillac, Ferrari, Infiniti, Jaguar, Land Rover, Lexus, Lincoln, Maserati, Mercedes-Benz, Porsche, Rolls Royce, Volvo

Low volume: < 595 units (new) High volume: > 595 units

(↑) Represent year-over-year <u>increases</u> or *favorable* changes; (↓) represent unfavorable changes

Retention and Turnover Trends

Turnover and retention trends were similar across the different groups, with luxury dealerships having less turnover and slightly higher median tenure than the domestic, mass market and import brands.

ADP SERIES: AVERAGE RETENTION AND TURNOVER, ALL BRANDS					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**47%**	**↑1%**	**76%**	**50%**	**3.1**
General Manager/Operator	14%	↓4%	93%	78%	9.1
Sales Manager	27%	↓6%	85%	62%	4.4
F&I Manager	36%	↓6%	80%	55%	3.5
Service Manager	26%	↑2%	87%	70%	5.9
Parts Manager	14%	↑1%	93%	82%	10.7
Sales Consultant	67%	↓13%	69%	39%	2.0
Service Advisor/Writer	45%	↓3%	76%	47%	2.7
B-Service Technician	29%	↑1%	84%	59%	3.9
Parts Consultant	27%	↑7%	85%	65%	4.9

Acura, Audi, BMW, Chrysler/Jeep/Dodge, FIAT, Ford, Honda Hyundai, Infiniti, Jaguar, Kia, Land Rover, Lexus, Mazda, Mercedes-Benz, Mitsubishi, Nissan, Porsche, Subaru, Toyota/Scion, Volkswagen, Volvo

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

ADP SERIES: RETENTION AND TURNOVER, DOMESTIC BRANDS					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**48%**	**0%**	**76%**	**49%**	**2.9**
General Manager/Operator	13%	↓6%	93%	78%	9.8
Sales Manager	26%	↓11%	85%	62%	4.6
F&I Manager	32%	↓3%	83%	56%	3.7
Service Manager	26%	↓1%	87%	66%	5.4
Parts Manager	18%	↑1%	92%	78%	10.6
Sales Consultant	73%	↓16%	67%	38%	1.9
Service Advisor/Writer	52%	↓1%	73%	43%	2.3
B-Service Technician	34%	↑2%	82%	56%	3.7
Parts Consultant	29%	↑6%	84%	62%	4.7

Buick/GMC, Chevrolet, Chrysler/Jeep/Dodge, FIAT, Ford
(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

ADP SERIES: RETENTION AND TURNOVER, IMPORT BRANDS					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**45%**	**0%**	**77%**	**51%**	**3.2**
General Manager/Operator	13%	↓5%	93%	79%	9.4
Sales Manager	26%	↓5%	86%	62%	4.4
F&I Manager	35%	↓9%	80%	55%	3.4
Service Manager	24%	↑2%	89%	72%	6.2
Parts Manager	13%	↑2%	94%	84%	11.3
Sales Consultant	63%	↓11%	70%	40%	2.2
Service Advisor/Writer	42%	↓3%	77%	49%	2.9
B-Service Technician	28%	↑2%	85%	61%	4.2
Parts Consultant	26%	↑7%	85%	66%	5.2

Acura, Audi, BMW, Honda, Hyundai, Infiniti, Jaguar, Land Rover, Lexus, Mercedes-Benz, MINI, Mitsubishi, Nissan, Porsche, Subaru, Toyota/Scion, Volkswagen, Volvo
(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

ADP SERIES: RETENTION AND TURNOVER, MASS MARKET BRANDS					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**49%**	**0%**	**75%**	**49%**	**2.9**
General Manager/Operator	14%	↓8%	93%	77%	8.9
Sales Manager	28%	↓8%	85%	61%	4.4
F&I Manager	36%	↓7%	81%	55%	3.5
Service Manager	26%	↓27%	87%	67%	5.5
Parts Manager	16%	↑2%	93%	80%	10.8
Sales Consultant	72%	↓15%	67%	38%	1.9
Service Advisor/Writer	49%	↓4%	74%	44%	2.4
B-Service Technician	32%	↑1%	83%	58%	3.9
Parts Consultant	29%	↑7%	84%	63%	4.6

Buick/GMC, Chevrolet, Chrysler/Jeep/Dodge, FIAT, Ford, Honda, Hyundai, Kia, Mazda, MINI, Mitsubishi, Nissan, Subaru, Toyota/Scion, Volkswagen

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

ADP SERIES: RETENTION AND TURNOVER, LUXURY BRANDS					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**38%**	**↑3%**	**80%**	**55%**	**3.6**
General Manager/Operator	13%	↑3%	94%	82%	10.8
Sales Manager	21%	↓2%	87%	66%	4.6
F&I Manager	29%	↓6%	81%	55%	3.6
Service Manager	21%	↑4%	91%	77%	6.9
Parts Manager	12%	↑2%	95%	85%	11.5
Sales Consultant	47%	↓7%	74%	44%	2.5
Service Advisor/Writer	33%	↑2%	82%	56%	3.6
B-Service Technician	24%	↑4%	86%	62%	4.3
Parts Consultant	23%	↑6%	87%	68%	5.5

Acura, Aston Martin, Audi, Bentley, BMW, Cadillac, Ferrari, Infiniti, Jaguar, Land Rover, Lexus, Lincoln, Maserati, Mercedes-Benz, Porsche, Rolls Royce, Volvo

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

VI. Dealership Compensation in 2020: Cars

This section contains tables and analyses for each of the **nine key positions** in car dealerships in each of the nine regions. There are three tables of statistics for the nation and for each region – all dealerships, all non-luxury franchise dealerships and all luxury franchise dealerships. The first column shows the average salary for the position in the region without regard to sales volume. The second column shows the year-over-year change in the regional average. Year-over-year increases or *favorable* changes in compensation are represented with green arrows (↑), while *unfavorable* changes are represented with red arrows (↓). The third column shows salary as a percentage of the U.S. average, the next three columns show the regional averages broken down by unit sales volume (new only), and the last column shows the average for that position for all dealers in the U.S.

For reporting purposes, we have defined volume levels as follows:

Annual New Units Retailed	Low Volume	Medium Volume	High Volume
Non-Luxury Cars	< 503	503 to 1,121	> 1,121
Luxury Cars	< 595		> 595

The charts on the next page present data for the nine key positions from a national perspective – both average and median compensation with the year-over-year change, plus this year's (2020) low-, medium- and high-volume averages. An analysis of national data by quartiles and top 10 percent for all positions follows. The discussion and charts for each of the regions reflect all-participant data.

National Compensation – Key Positions

ALL-PARTICIPANTS: NATIONAL COMPENSATION – CARS – ALL DEALERSHIPS							
Position	Overall National Average	Year Over Year Change	Overall National Median	Year Over Year Change	Low Volume Average	Medium Volume Average	High Volume Average
All Positions	**$80,825**	**↑5%**	**$61,389**	**↑3%**	**$77,410**	**$78,580**	**$84,007**
General Manager/Operator	$423,179	↑18%	$332,484	↑16%	$307,991	$377,000	$565,255
Sales Manager	$151,075	↑8%	$141,858	↑8%	$138,106	$141,600	$163,636
F&I Manager	$159,618	↑3%	$148,729	↑4%	$140,340	$147.324	$175,514
Service Manager	$133,260	↓1%	$125,152	↑2%	$115,457	$130,899	$149,204
Parts Manager	$105,701	↓3%	$96,394	↓2%	$88,576	$102,661	$124,346
Sales Consultant	$81,150	↑9%	$70,976	↑9%	$81,312	$78,128	$82,942
Service Advisor/Writer	$74,014	↑3%	$69,284	↑3%	$71,616	$73,672	$75,281
B-Service Technician	$65,661	↑2%	$60,553	↑3%	$63,576	$65,878	$66,438
Parts Consultant	$53,747	↓2%	$51,322	↓2%	$51,060	$53,396	$55,465

ALL-PARTICIPANTS: NATIONAL COMPENSATION – CARS – NON-LUXURY DEALERSHIPS							
Position	Overall National Average	Year Over Year Change	Overall National Median	Year Over Year Change	Low Volume Average	Medium Volume Average	High Volume Average
All Positions	**$78,129**	**↑7%**	**$58,898**	**↑4%**	**$74,592**	**$74,189**	**$81,974**
General Manager/Operator	$419,635	↑24%	$322,156	↑23%	$288,804	$343,505	$575,435
Sales Manager	$146,638	↑8%	$138,125	↑9%	$136,178	$131,741	$159,738
F&I Manager	$155,541	↑5%	$145,363	↑5%	$139,051	$138,877	$171,137
Service Manager	$126,801	↑1%	$118,610	↑2%	$111,392	$119,636	$143,376
Parts Manager	$101,989	↓2%	$92,872	↓1%	$85,839	$95,576	$121,108
Sales Consultant	$76,604	↑9%	$66,921	↑8%	$77,848	$71,353	$78,925
Service Advisor/Writer	$68,223	↑3%	$64,649	↑3%	$65,985	$65,979	$70,317
B-Service Technician	$62,752	↑3%	$57,749	↑4%	$60,417	$61,765	$64,156
Parts Consultant	$52,521	↓1%	$50,005	↓1%	$50,531	$51,258	$54,312

ALL-PARTICIPANTS: NATIONAL COMPENSATION – CARS – LUXURY DEALERSHIPS						
Position	Overall National Average	Year Over Year Change	Overall National Median	Year Over Year Change	Low Volume Average	High Volume Average
All Positions	**$89,197**	**↑3%**	**$69,518**	**↑1%**	**$85,680**	**$90,709**
General Manager/Operator	$423,179	↑3%	$355,526	↑1%	$355,813	$487,388
Sales Manager	$166,098	↑7%	$158,986	↑6%	$146,815	$175,193
F&I Manager	$176,382	0%	$165,134	↓2%	$149,705	$186,800
Service Manager	$151,163	↓4%	$146,833	0%	$133,115	$160,827
Parts Manager	$117,001	↓6%	$109,400	↓4%	$101,378	$126,657
Sales Consultant	$96,757	↑9%	$87,709	↑11%	$91,448	$99,093
Service Advisor/Writer	$88,786	↑4%	$83,521	↑4%	$83,424	$91,093
B-Service Technician	$72,089	↑1%	$66,710	↑1%	$70,267	$72,814
Parts Consultant	$57,117	↓4%	$55,355	↓4%	$53,732	$58,497

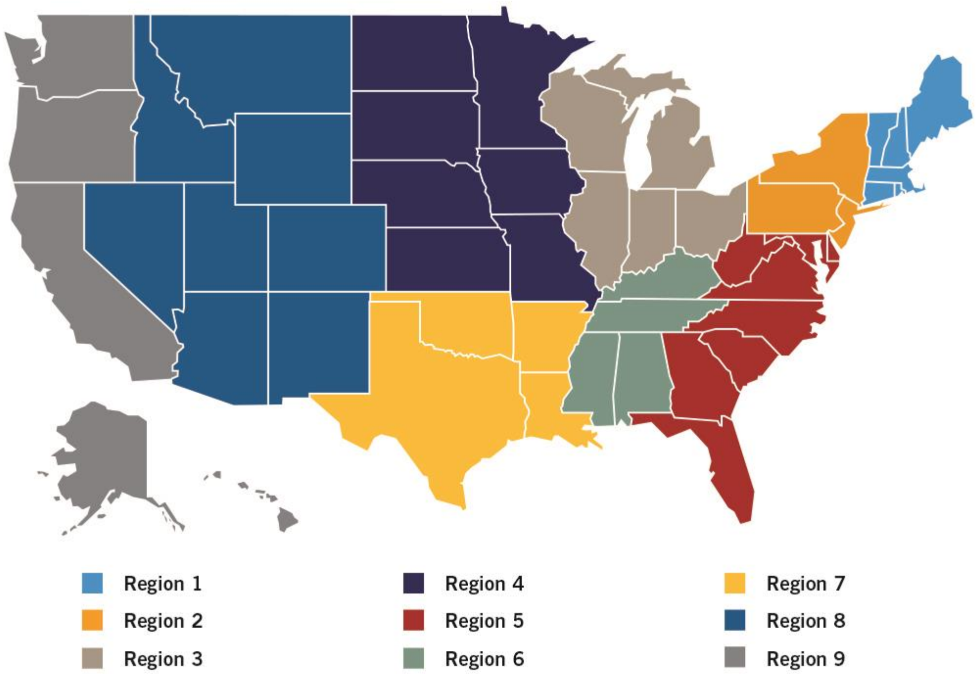
National Compensation – All Position Quartiles

ALL PARTICIPANTS: NATIONAL COMPENSATION – CARS – ALL POSITION QUARTILES					
Position	**Median**	**Year Over Year Change**	**Lower 25%**	**Upper 25%**	**Top 10%**
MANAGEMENT POSITIONS					
Dealer Principal/Owner	$245,925	↑8%	$140,250	$427,200	$719,539
General Manager/Operator	$332,484	↑16%	$226,561	$507,539	$774,433
Controller/Business Manager	$133,650	↑11%	$94,200	$176,017	$227,244
General Sales Manager	$208,238	↑16%	$163,876	$265,178	$332,385
Fixed Operations Director	$165,402	↓3%	$133,673	$219,402	$288,684
Executive Assistant	$52,984	↓3%	$41,519	$65,508	$82,649
ADMINISTRATIVE POSITIONS					
Admin/Office Manager	$66,471	↑10%	$54,306	$80,400	$99,636
Accountant/Accting. Manager	$62,350	0%	$49,733	$79,892	$93,750
Human Resources Manager	$71,121	↑11%	$52,000	$98,346	$141,939
Payroll Manager	$47,613	↓5%	$39,810	$57,558	$74,073
Clerical Staff: AP/AR/Title	$36,932	↑2%	$30,909	$44,790	$54,131
Cashier	$28,999	0%	$25,005	$33,328	$39,546
Receptionist/Switchboard	$28,053	↑1%	$23,436	$33,307	$39,146
SALES POSITIONS					
Sales Manager	$141,858	↑8%	$109,548	$184,396	$224,306
Used/CPO Sales Manager	$136,427	↑5%	$104,084	$176,075	$217,800
Fleet/Commercial Sales Manager	$113,650	↑16%	$76,12	$163,192	$225,805
F&I Director/ Producer	$148,729	↑4%	$108,545	$195,255	$252,646
Internet Sales/BDC Manager	$77,134	↑1%	$57,506	$102,471	$133,865
Sales Closer/ Team Leader	$121,693	↑15%	$88,007	$159,171	$195,019
Sales Consultant	$70,975	↑9%	$51,731	$98,760	$132,755
Internet Sales Consultant	$69,160	↑11%	$61,795	$74,710	$111,795
Product Specialist	$47,567	↓5%	$35,807	$65,507	$89,844
BDC Rep/CSR/Scheduler	$36,200	↓6%	$29,594	$47,336	$53,721
CSI/Client Relations Manager	$55,400	↑5%	$46,798	$70,255	$93,825
Advertising/Marketing Manager	$59,311	↑3%	$39,712	$91,200	$129,385
U/C Reconditioning Tech	$31,360	↓17%	$25,859	$38,984	$56,961
Dealer Trade Driver	$26,525	↓8%	$18,834	$49,481	$63,861
Car Buyer	$71,429	↓9%	$50,462	$103,273	$139,807
SERVICE POSITIONS					
Service Manager	$125,152	↑2%	$95,995	$159,986	$201,445
Express/Quick Lube Manager	$62,199	0%	$44,308	$83,972	$96,485

ALL PARTICIPANTS: NATIONAL COMPENSATION – CARS – ALL POSITION QUARTILES

Position	Median	Year Over Year Change	Lower 25%	Upper 25%	Top 10%
Shop Foreman/Asst Manager	$89,796	↓1%	$66,905	$109,319	$131,329
Service Advisor/Writer	$69,284	↑3%	$52,120	$89,623	$115,869
A-Tech/Master/Team Leader	$78,252	↓1%	$60,118	$99,494	$123,419
B-Service Technician	$60,553	↑3%	$45,723	$79,499	$101,458
C-Tech/Apprentice/Trainee	$36,735	↓3%	$29,581	$47,527	$62,946
D-Tech/Hourly Lube Tech	$31,075	↑1%	$25,858	$38,089	$51,132
Dispatcher	$52,903	↓5%	$41,379	$62,581	$78,643
Warranty Administrator	$44,870	↑1%	$36,097	$57,406	$72,331
Detail/PDI/Prep Manager	$37,519	↓15%	$29,316	$50,874	$66,126
Appointment Coordinator	$32,338	↓1%	$26,780	$38,869	$49,361
Porter/Lot Person/Detailer	$29,533	↓2%	$24,771	$35,915	$44,888
Courtesy Shuttle Driver	$25,776	↑2%	$21,586	$29,808	$35,821
Rental Staff	$35,418	↑5%	$29,390	$46,437	$58,560
PARTS POSITIONS					
Parts Manager	$96,394	↓2%	$75,231	$125,975	$161,520
Warehouse/Asst. Parts Manager	$66,804	↑3%	$50,956	$84,728	$102,350
Wholesale Parts Sales	$64,621	↓2%	$51,786	$82,882	$103,908
Parts Consultant	$51,322	↓2%	$41,010	$63,840	$76,495
Parts Driver	$29,135	↑3%	$25,223	$34,058	$39,980
Parts Shipper/Receiver	$33,024	↑4%	$26,247	$40,026	$50,639
Parts Stockperson	$30,154	↑1%	$26,014	$34,672	$43,846
BODY SHOP POSITIONS					
Body Shop Manager	$102,091	↓4%	$75,744	$131,680	$163,401
Body Shop Foreman	$79,400	↑11%	$62,148	$96,104	$117,174
Estimator/Advisor	$63,928	↓4%	$52,006	$78,130	$96,874
B/S Admin Support	$34,941	↑1%	$28,689	$42,426	$51,546
A-Tech/Master Metal-Paint	$72,810	↓6%	$55,925	$93,827	$118,775
B-Tech/Metal/Painter	$71,321	↓1%	$54,484	$91,719	$117,075
C-Tech/Apprentice/Trainee	$51,030	↑23%	$37,677	$74,633	$101,561
D-Tech/Helper/Detailer	$33,419	↑2%	$27,391	$44,243	$62,832
MISCELLANEOUS POSITIONS					
IT Systems/Network Manager	$70,585	0%	$50,220	$97,026	$126,208
Website Manager/Webmaster	$47,379	↓8%	$35,475	$59,999	$80,751
Maintenance/Janitor	$33,993	↑2%	$27,617	$45,148	$59,023
Security Guard	$34,844	↑13%	$32,011	$39,127	$42,052

Geographic Region Map



- **Region 1 – New England:** Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont
- **Region 2 – Mid-Atlantic:** New Jersey, New York and Pennsylvania
- **Region 3 – East North Central:** Illinois, Indiana, Michigan, Ohio and Wisconsin
- **Region 4 – West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota
- **Region 5 – South Atlantic:** Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia
- **Region 6 – East South Central:** Alabama, Kentucky, Mississippi and Tennessee
- **Region 7 – West South Central:** Arkansas, Louisiana, Oklahoma and Texas
- **Region 8 – Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming
- **Region 9 – Pacific:** Alaska, California, Hawaii, Oregon and Washington

REGION 1

NEW ENGLAND

Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont

Compensation statistics of interest:

The New England region's all-dealerships, all-positions average compensation of $75,407 was seven percent lower than the national average of $80,825. With a 15 percent difference ($12,284) between the lowest regional average and the highest, New England ranked seventh of the nine regions in overall compensation.

One out of nine key dealership positions earned incomes equal to or higher than their respective national averages; eight of the key positions didn't exceed national all-dealer averages (Figure 1).

Sales managers in non-luxury dealerships had the highest income growth; five of the nine key positions saw income decline. (Figure 2).

Only one key position in luxury dealerships had income growth; one of the key positions saw income decline by 26 percent (Figure 3).

REGION 1: NEW ENGLAND – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National All-Dealer Average
All Positions	**$75,407**	**↓5%**	**93%**	**$76,434**	**$75,853**	**$72,495**	**$80,825**
General Manager/Operator	$269,903	↓ 9%	64%	*	$323,363	*	$423,179
Sales Manager	$145,980	↑ 11%	97%	$160,649	$142,006	*	$151,075
F&I Manager	$138,941	↓ 16%	87%	$142,345	$146,936	$125,403	$159,618
Service Manager	$132,279	↑ 7%	99%	$146,430	$123,120	*	$133,260
Parts Manager	$95,668	↓13%	91%	$96,653	$91,818	*	$105,701
Sales Consultant	$78,887	↑ 2%	97%	$81,756	$82,533	$68,982	$81,150
Service Advisor/Writer	$66,993	↓16%	91%	$68,886	$66,415	$66,551	$74,014
B-Technician	$60,903	↑8%	93%	$56,688	$61,891	$62,354	$65,661
Parts Consultant	$55,556	↓2%	103%	$56,674	$55,560	*	$53,747

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

REGION 1: NEW ENGLAND – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)							
Position	**Overall Region Average**	**Year Over Year Change**	**Average as % of National**	**Low Volume**	**Medium Volume**	**High Volume**	**National Non-Luxury Average**
All Positions	**$73,781**	**0%**	**94%**	**$75,302**	**$73,305**	**$72,495**	**$78,129**
General Manager/Operator	$235,568	↓ 3%	56%	*	*	*	$419,635
Sales Manager	$141,882	↑ 14%	97%	$146,080	$145,533	*	$146,638
F& Manager	$138,842	↓ 13%	89%	$142,345	$147,090	$125,404	$155,541
Service Manager	$128,458	↑ 11%	101%	$139,120	$117,703	*	$126,801
Parts Manager	$94,632	↓ 9%	93%	$97,473	$84,706	*	$101,989
Sales Consultant	$74,524	↑ 5%	97%	$78,764	$75,941	$68,982	$76,604
Service Advisor/Writer	$63,111	↓ 7%	93%	$57,028	$64,135	$66,551	$68,223
B-Technician	$57,443	↓ 7%	92%	$53,865	$55,100	$62,354	$62,752
Parts Consultant	$55,822	↑ 8%	106%	$57,078	$55,855	*	$52,521

Low volume: < 503 units (new) Medium: 503 to 1,121 units High volume: > 1,121 units

REGION 1: NEW ENGLAND – CARS – LUXURY DEALERSHIPS (FIGURE 3)						
Position	**Overall Region Average**	**Year Over Year Change**	**Average as % of National**	**Low Volume**	**High Volume**	**National Luxury Average**
All Positions	**$82,971**	**↓ 10%**	**93%**	**$90,904**	**$78,653**	**$89,197**
General Manager/Operator	*	*	*	*	*	$423,179
Sales Manager	*	*	*	*	*	$166,098
F&I Manager	*	*	*	*	*	$176,382
Service Manager	$141,832	0%	94%	*	*	$151,163
Parts Manager	$105,538	↓ 13%	90%	*	*	$117,001
Sales Consultant	$97,915	↑ 9%	101%	$127,651	$81,108	$96,757
Service Advisor/Writer	$76,331	↓ 26%	86%	$83,505	$71,440	$88,786
B-Technician	$69,007	↓ 9%	96%	$77,571	$65,054	$72,089
Parts Consultant	*	*	*	*	*	$57,117

Low volume: < 595 units (new) High volume: > 595 units

REGION 2

MID-ATLANTIC

New Jersey, New York and Pennsylvania

Compensation statistics of interest:

The Mid-Atlantic region's all-dealerships, all-positions average compensation, ranked sixth of the nine regions. With a 15 percent difference ($12,284) between the lowest regional compensation average and the highest, this region's average was 4 percent below the national average compensation.

The Mid-Atlantic region's all-dealerships, all-positions average income growth rate increased by 7 percent although only one of the key dealership positions earned income above its national average (Figure 1).

All key positions in non-luxury dealerships had income growth ranging from 3 to 16 percent; General Manager/Operator compensation increased by 16 percent (Figure 2).

Five out of nine key positions in luxury dealerships had income growth ranging from 4 to 14 percent; Service Manager compensation decreased by 7 percent (Figure 3).

REGION 2: MID-ATLANTIC – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National All-Dealer Average
All Positions	**$76,667**	**↑ 7%**	**96%**	**$74,711**	**$77,561**	**$78,007**	**$80,025**
General Manager/Operator	$303,357	↑ 11%	72%	$252,228	$348,436	$413,116	$423,179
Sales Manager	$133,911	↑ 7%	89%	$136,113	$133,781	$131,165	$151,075
F&I Manager	$135,062	↑ 8%	85%	$130,711	$132,680	$145,069	$159,618
Service Manager	$113,921	↑ 2%	85%	$108,180	$117,432	$119,976	$133,260
Parts Manager	$87,920	↑ 5%	83%	$75,573	$96,864	$102,450	$105,701
Sales Consultant	$79,153	↑ 8%	98%	$77,831	$78,691	$81,981	$81,150
Service Advisor/Writer	$70,750	↑ 5%	96%	$69,904	$72,730	$67,950	$74,014
B-Technician	$65,281	↑ 3%	99%	$60,721	$68,666	$66,397	$65,661
Parts Consultant	$51,430	↑ 4%	96%	$48,595	$52,555	$55,019	$53,747

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

REGION 2: MID-ATLANTIC – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)							
Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National Non-Luxury Average
All Positions	**$73,729**	**↑ 8%**	**94%**	**$66,695**	**$75,736**	**$78,135**	**$78,129**
General Manager/Operator	$306,668	↑ 16%	73%	$216,988	$352,502	$413,116	$419,635
Sales Manager	$123,227	↑ 11%	84%	$119,112	$119,617	$130,593	$146,638
F&I Manager	$131,238	↑ 7%	84%	$119,993	$129,051	$145,498	$155,541
Service Manager	$111,523	↑ 4%	88%	$100,403	$118,022	$119,976	$126,801
Parts Manager	$82,739	↑ 3%	81%	$67,625	$92,121	$96,900	$101,989
Sales Consultant	$75,191	↑ 9%	98%	$70,887	$73,917	$81,347	$76,604
Service Advisor/Writer	$65,658	↑ 4%	96%	$59,599	$68,235	$67,262	$68,223
B-Technician	$63,366	↑ 5%	101%	$57,443	$65,741	$66,596	$62,752
Parts Consultant	$50,908	↑ 7%	97%	$48,018	$51,957	$54,053	$52,521

Low volume: < 503 units (new) **Medium: 503 to 1,121 units** **High volume: > 1,121 units**

REGION 2: MID-ATLANTIC – CARS – LUXURY DEALERSHIPS (FIGURE 3)						
Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	High Volume	National Luxury Average
All Positions	**$84,074**	**↑ 5%**	**94%**	**$84,761**	**$83,026**	**$89,197**
General Manager/Operator	$298,732	↑ 6%	71%	$285,086	$345,967	$423,179
Sales Manager	$158,671	↑ 14%	96%	$161,927	$154,601	$166,098
F&I Manager	$149,185	↑ 12%	85%	$150,747	$146,136	$176,382
Service Manager	$119,419	↓7%	79%	$123,680	$113,404	$151,163
Parts Manager	$102,064	↑ 6%	87%	$94,891	$117,008	$117,001
Sales Consultant	$90,822	0%	94%	$88,627	$94,032	$96,757
Service Advisor/Writer	$83,927	↑ 4%	95%	$84,042	$83,759	$88,786
B-Technician	$69,910	0%	97%	$67,596	$72,990	$72,089
Parts Consultant	$52,710	↓ 2%	92%	$51,429	$54,493	$57,117

Low volume: < 595 units (new) **High volume: > 595 units**

REGION 3

EAST NORTH CENTRAL

Illinois, Indiana, Michigan, Ohio and Wisconsin

Compensation statistics of interest:

The East North Central region's all-dealerships, all-positions average income of $73,953 was 9 percent lower than the national average of $80,825. (Figure 1). This region's overall average ranked last of the nine regions. It is perhaps useful to note that overall regional averages varied 15.3 percent ($12,284) from highest to lowest.

Service Managers had similar incomes as the national averages and F&I Managers earned 13 percent lower than the national average; six out of the seven other key positions did not exceed national all-dealer averages (Figure 1).

Five out of nine key positions in non-luxury dealerships had income growth ranging from 4 to 11 percent (Figure 2).

Eight of nine key positions in luxury dealerships saw income decrease from 4 to 19 percent; Service Manager positions saw a 19 percent decrease in compensation while sales consultants compensation remained the same. (Figure 3).

REGION 3: EAST NORTH CENTRAL – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National All-Dealer Average
All Positions	**$73,953**	**↑ 3%**	**91%**	**$69,264**	**$70,179**	**$79,751**	**$80,825**
General Manager/Operator	$295,022	↑ 7%	70%	$261,640	$273,573	$339,852	$423,179
Sales Manager	$138,682	↑ 1%	92%	$120,365	$128,753	$160,911	$151,075
F&I Manager	$138,617	↑ 2%	87%	$124,339	$129,828	$153,662	$159,618
Service Manager	$106,350	↓ 5%	80%	$94,043	$105,343	$120,460	$133,260
Parts Manager	$87,869	↓ 3%	83%	$79,416	$84,068	$103,143	$105,701
Sales Consultant	$79,756	↑ 8%	98%	$74,104	$70,790	$88,827	$81,150
Service Advisor/Writer	$61,902	↓ 3%	84%	$58,887	$60,491	$65,098	$74,014
B-Service Technician	$63,943	↑ 4%	97%	$60,801	$59,235	$68,416	$65,661
Parts Consultant	$47,785	↓ 5%	89%	$47,701	$43,731	$51,129	$53,747

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

REGION 3: EAST NORTH CENTRAL – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)							
Position	**Overall Region Average**	**Year Over Year Change**	**Average as % of National**	**Low Volume**	**Medium Volume**	**High Volume**	**National Non-Luxury Average**
All Positions	**$73,754**	**↑ 4%**	**94%**	**$67,264**	**$69,418**	**$79,746**	**$78,129**
General Manager/Operator	$287,541	↑ 11%	69%	$223,042	$264,464	$339,852	$419,635
Sales Manager	$140,141	↑ 4%	96%	$120,020	$126,839	$160,885	$146,638
F&I Manager	$139,575	↑ 4%	90%	$124,566	$128,761	$154,320	$155,541
Service Manager	$106,151	↓ 3%	84%	$91,617	$102,780	$120,997	$126,801
Parts Manager	$87,569	↓ 2%	86%	$77,462	$82,497	$104,145	$101,989
Sales Consultant	$80,021	↑ 8%	104%	$74,077	$69,436	$89,070	$76,604
Service Advisor/Writer	$60,067	↓ 3%	88%	$54,406	$56,726	$65,098	$68,223
B-Service Technician	$63,857	↑ 6%	102%	$57,910	$59,234	$68,314	$62,752
Parts Consultant	$47,867	↓ 4%	91%	$47,694	$43,090	$51,149	$52,521

Low volume: < 503 units (new) **Medium: 503 to 1,121 units** **High volume: > 1,121 units**

REGION 3: EAST NORTH CENTRAL – CARS – LUXURY DEALERSHIPS (FIGURE 3)						
Position	**Overall Region Average**	**Year Over Year Change**	**Average as % of National**	**Low Volume**	**High Volume**	**National Luxury Average**
All Positions	**$75,586**	**↓ 6%**	**85%**	**$76,333**	**$74,352**	**$89,197**
General Manager/Operator	$343,070	↓ 13%	81%	$347,312	$336,284	$423,179
Sales Manager	$129,424	↓ 17%	78%	$125,852	$137,360	$166,098
F&I Manager	$128,235	↓ 17%	73%	$125,677	$133,137	$176,382
Service Manager	$107,555	↓ 19%	71%	$109,566	$102,529	$151,163
Parts Manager	$90,127	↓ 16%	77%	$89,783	$90,643	$117,001
Sales Consultant	$77,066	0%	80%	$77,074	$77,054	$96,757
Service Advisor/Writer	$73,004	↓ 4%	82%	$75,484	$67,917	$88,786
B-Service Technician	$64,528	↓ 7%	90%	$66,532	$61,675	$72,089
Parts Consultant	$47,203	↓ 8%	83%	$48,751	$45,006	$57,117

Low volume: < 595 units (new) **High volume: > 595 units**

REGION 4
WEST NORTH CENTRAL

Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota

Compensation statistics of interest:

The West North Central region's all-dealerships, all-positions average income of $74,557 was 8 percent lower than the national average of $80,825. (Figure 1). This region ranked eighth out of nine regions

B-Service Technician was the only key position whose income met or exceeded the position's national average; the other eight key positions did not exceed national all-dealer averages (Figure 1).

Six out of nine key positions in non-luxury dealerships had income growth ranging from 1 to 31 percent; two of the key positions saw income decline by 3 percent (Figure 2).

Five out of nine key positions in luxury dealerships had income growth ranging from 1 to 14 percent; F&I manager and sales consultants saw income increase by 14 and 7 percent respectively (Figure 3).

REGION 4: WEST NORTH CENTRAL – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National All-Dealer Average
All Positions	**$74,557**	**↑ 5%**	**92%**	**$72,036**	**$73,958**	**$78,835**	**$80,825**
General Manager/Operator	$317,134	↑ 15%	75%	$248,306	$335,863	$474,130	$423,179
Sales Manager	$120,511	↑ 3%	80%	$116,064	$116,429	$131,601	$151,075
F&I Manager	$155,944	↑ 15%	98%	$128,178	$169,736	$178,865	$159,618
Service Manager	$109,915	↑ 2%	82%	$94,701	$120,234	$125,860	$133,260
Parts Manager	$88,646	↓ 3%	84%	$74,059	$107,916	$95,970	$105,701
Sales Consultant	$78,640	↑ 9%	97%	$80,838	$75,887	$75,887	$81,150
Service Advisor/Writer	$68,207	↑ 1%	92%	$68,207	$71,873	$68,414	$74,014
B-Service Technician	$65,870	↑ 2%	100%	$64,779	$66,694	$65,803	$65,661
Parts Consultant	$48,756	↓ 7%	91%	$43,983	$52,736	$48,610	$53,747

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

REGION 4: WEST NORTH CENTRAL – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)							
Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National Non-Luxury Average
All Positions	**$72,166**	**↑ 6%**	**92%**	**$69,088**	**$70,465**	**$78,217**	**$78,129**
General Manager/Operator	$308,310	↑ 31%	73%	$225,519	$308,829	$459,145	$419,635
Sales Manager	$117,146	↑ 4%	80%	$115,395	$111,091	$127,351	$146,638
F&I Manager	$151,706	↑ 14%	98%	$124,872	$156,514	$180,397	$155,541
Service Manager	$103,694	↑ 1%	82%	$94,323	$105,491	$116,973	$126,801
Parts Manager	$83,565	↓ 3%	82%	$68,740	$101,894	$88,316	$101,989
Sales Consultant	$73,338	↑ 8%	96%	$75,427	$70,514	$73,773	$76,604
Service Advisor/Writer	$62,454	↓ 3%	92%	$58,428	$65,879	$62,559	$68,223
B-Service Technician	$62,975	↑ 2%	100%	$61,939	$62,714	$64,230	$62,752
Parts Consultant	$47,674	↓ 7%	91%	$42,720	$51,214	$47,844	$52,521

Low volume: < 503 units (new) **Medium: 503 to 1,121 units** **High volume: > 1,121 units**

REGION 4: WEST NORTH CENTRAL – CARS – LUXURY DEALERSHIPS (FIGURE 3)						
Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	High Volume	National Luxury Average
All Positions	**$82,974**	**0%**	**93%**	**$81,473**	**$83,981**	**$89,197**
General Manager/Operator	$340,663	↓ 16%	81%	$281,726	*	$423,179
Sales Manager	$134,506	↓ 4%	81%	$115,455	$151,890	$166,098
F&I Manager	$176,368	↑ 14%	100%	*	$197,243	$176,382
Service Manager	$129,775	↓ 2%	86%	$95,776	$163,773	$151,163
Parts Manager	$105,794	↓ 7%	90%	$87,177	*	$117,001
Sales Consultant	$98,318	↑ 7%	102%	$97,724	$98,822	$96,757
Service Advisor/Writer	$82,509	↑ 1%	93%	$75,517	$87,064	$88,786
B-Service Technician	$71,571	↑ 1%	99%	$70,476	$72,116	$72,089
Parts Consultant	$52,358	↓ 6%	92%	$47,332	$55,177	$57,117

Low volume: < 595 units (new) **High volume: > 595 units**

REGION 5
SOUTH ATLANTIC

Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia

Compensation statistics of interest:

The South Atlantic region's all-dealerships, all-positions average income of $81,886 was 1 percent higher than the national average of $80,825 (Figure 1). This region's overall average ranked fourth of the nine regions. There was 15.3 percent difference ($12,284) among the regions, from lowest overall average to highest.

Five key dealership positions earned incomes equal to or higher than their respective national averages (Figure 1).

Six out of nine key positions in non-luxury dealerships saw their annual compensation increase by 2 to 24 percent; sales manager and F&I managers compensation increased by 9 and 3 percent respectively. (Figure 2).

Seven out of nine key positions in luxury dealerships had income growth ranging from 1 to 17 percent; parts managers saw their compensation fall by 3 percent (Figure 3).

REGION 5: SOUTH ATLANTIC – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National All-Dealer Average
All Positions	**$81,886**	**↑ 7%**	**101%**	**$75,862**	**$79,685**	**$84,130**	**$80,825**
General Manager/Operator	$498,363	↑ 20%	118%	$284,135	$392,271	$638,601	$423,179
Sales Manager	$152,698	↑ 10%	101%	$131,454	$141,394	$162,025	$151,075
F&I Manager	$163,750	↑ 2%	103%	$157,092	$146,736	$172,048	$159,618
Service Manager	$141,841	↑ 2%	106%	$115,965	$136,384	$154,542	$133,260
Parts Manager	$112,122	↓ 2%	106%	$89,184	$102,952	$127,887	$105,701
Sales Consultant	$78,310	↑ 7%	97%	$75,243	$76,257	$79,551	$81,150
Service Advisor/Writer	$72,804	↑ 3%	98%	$73,349	$72,766	$72,720	$74,014
B-Service Technician	$65,078	↑ 5%	99%	$62,531	$65,242	$65,424	$65,661
Parts Consultant	$52,490	↓ 3%	98%	$49,090	$52,598	$53,263	$53,747

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

REGION 5: SOUTH ATLANTIC – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National Non-Luxury Average
All Positions	**$78,553**	**↑ 7%**	**101%**	**$72,249**	**$74,608**	**$81,018**	**$78,129**
General Manager/Operator	$495,816	↑ 24%	118%	$215,310	$333,796	$644,208	$419,635
Sales Manager	$146,553	↑ 9%	100%	$120,796	$129,470	$156,910	$146,638
F&I Manager	$157,145	↑ 3%	101%	$161,666	$131,116	$164,759	$155,541
Service Manager	$132,781	↓ 1%	105%	$101,104	$123,721	$146,568	$126,801
Parts Manager	$108,730	↓ 2%	107%	$87,291	$93,406	$123,722	$101,989
Sales Consultant	$72,955	↑ 7%	95%	$69,598	$69,310	$74,422	$76,604
Service Advisor/Writer	$66,849	↑ 2%	98%	$70,388	$64,657	$67,104	$68,223
B-Service Technician	$61,648	↑ 5%	98%	$59,268	$61,494	$61,972	$62,752
Parts Consultant	$50,278	↓ 3%	96%	$48,066	$47,836	$51,623	$52,521

Low volume: < 503 units (new) **Medium: 503 to 1,121 units** **High volume: > 1,121 units**

REGION 5: SOUTH ATLANTIC – CARS – LUXURY DEALERSHIPS (FIGURE 3)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	High Volume	National Luxury Average
All Positions	**$90,192**	**↑ 6%**	**101%**	**$84,027**	**$91,662**	**$89,197**
General Manager/Operator	$505,835	↑ 13%	120%	$364,327	$561,739	$423,179
Sales Manager	$171,978	↑ 17%	104%	$153,529	$177,278	$166,098
F&I Manager	$186,600	↑ 1%	106%	$157,068	$193,695	$176,382
Service Manager	$160,641	↑ 7%	106%	$144,488	$166,189	$151,163
Parts Manager	$119,687	↓ 3%	102%	$99,046	$127,596	$117,001
Sales Consultant	$93,553	↑ 8%	97%	$80,669	$96,739	$96,757
Service Advisor/Writer	$85,805	↑ 6%	97%	$78,965	$87,529	$88,786
B-Service Technician	$71,559	↑ 5%	99%	$68,449	$72,314	$72,089
Parts Consultant	$57,379	↓ 1%	100%	$53,528	$58,249	$57,117

Low volume: < 595 units (new) **High volume: > 595 units**

REGION 6
EAST SOUTH CENTRAL

Alabama, Kentucky, Mississippi and Tennessee

Compensation statistics of interest:

The East South Central region's all-dealerships, all-positions average income of $77,286 was 3 percent lower than the national average of $80,825. (Figure 1). This region ranked fifth out of the nine regions in overall compensation. The difference between the lowest and highest regional averages was 15.3 percent ($12,284).

None of the key positions exceeded national all-dealer averages (Figure 1).

Seven of nine key positions in non-luxury dealerships saw income growth; two out of nine key positions saw income decline by 2 to 4 percent (Figure 2).

Four out of nine key positions in luxury dealerships had income growth ranging from 3 to 15 percent; one of the key positions saw income decline by 16 percent (Figure 3).

REGION 6: EAST SOUTH CENTRAL – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National All-Dealer Average
All Positions	**$77,286**	**↑ 6%**	**97%**	**$67,552**	**$78,996**	**$80,679**	**$80,024**
General Manager/Operator	$380,992	↑ 21%	90%	$249,105	$351,319	$590,231	$423,179
Sales Manager	$136,653	↑ 8%	90%	$111,396	$136,853	$153,623	$151,075
F&I Manager	$144,676	↓ 2%	91%	$113,105	$137,881	$164,668	$159,618
Service Manager	$124,785	↑ 3%	94%	$105,522	$138,783	$126,670	$133,260
Parts Manager	$96,842	↑ 1%	92%	$77,822	$99,432	$110,627	$105,701
Sales Consultant	$72,907	↑ 6%	90%	$62,107	$82,049	$68,343	$81,150
Service Advisor/Writer	$72,206	↑ 9%	98%	$60,908	$75,908	$74,196	$74,014
B-Service Technician	$63,182	0%	96%	$61,196	$64,839	$61,781	$65,661
Parts Consultant	$49,058	↓ 2%	91%	$40,032	$52,990	$48,241	$53,747

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

REGION 6: EAST SOUTH CENTRAL – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National Non-Luxury Average
All Positions	**$72,118**	**↑ 5%**	**92%**	**$62,249**	**$73,608**	**$76,320**	**$78,129**
General Manager/Operator	$345,988	↑ 23%	82%	$223,245	$341,223	$489,580	$419,635
Sales Manager	$130,439	↑ 14%	89%	$105,124	$132,747	$144,047	$146,638
F&I Manager	$138,873	↓ 4%	89%	$108,713	$135,387	$155,057	$155,541
Service Manager	$112,594	↑ 7%	89%	$94,454	$127,417	$117,238	$126,801
Parts Manager	$89,166	↓ 2%	87%	$73,752	$89,548	$104,007	$101,989
Sales Consultant	$67,257	↑ 2%	88%	$56,468	$74,134	$65,865	$76,604
Service Advisor/Writer	$64,298	↑ 1%	94%	$52,668	$68,627	$66,684	$68,223
B-Service Technician	$56,282	↑ 1%	90%	$51,906	$59,931	$53,702	$62,752
Parts Consultant	$46,995	↑ 1%	89%	$40,164	$50,997	$45,590	$52,521

Low volume: < 503 units (new) **Medium: 503 to 1,121 units** **High volume: > 1,121 units**

REGION 6: EAST SOUTH CENTRAL – CARS – LUXURY DEALERSHIPS (FIGURE 3)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	High Volume	National Luxury Average
All Positions	**$95,720**	**↑ 7%**	**107%**	**$95,053**	**$95,922**	**$89,197**
General Manager/Operator	$478,503	↑ 15%	113%	*	*	$423,179
Sales Manager	$158,056	↓ 7%	95%	*	$164,462	$166,098
F&I Manager	$166,924	↑ 3%	95%	*	$175,496	$176,382
Service Manager	$160,422	↓ 2%	106%	*	$156,878	$151,163
Parts Manager	$119,872	↑ 8%	102%	*	$128,801	$117,001
Sales Consultant	$90,496	↓ 16%	94%	$93,396	$89,803	$96,757
Service Advisor/Writer	$91,975	↑ 8%	104%	$80,677	$95,916	$88,786
B-Service Technician	$75,129	0%	104%	$70,893	$76,579	$72,089
Parts Consultant	$54,768	↓ 7%	96%	*	$57,080	$57,117

Low volume: < 595 units (new) **High volume: > 595 units**

REGION 7
WEST SOUTH CENTRAL

Arkansas, Louisiana, Oklahoma and Texas

Compensation statistics of interest:

The West South Central region's all-dealerships, all-positions average income of $83,774 was 5 percent higher than the national average of $80,825 and ranked second of the nine regions (Figure 1). There was 15.3 percent difference ($12,284) among the regions, from lowest overall average to highest.

Eight of the nine key dealership positions earned incomes higher than their respective national averages; parts manager was 16 points higher the position's national average (Figure 1).

Seven out of nine key dealership positions in non-luxury dealerships had income growth ranging from 2 to 21 percent; one key position saw income decline by 6 percent. (Figure 2).

Four out of nine key positions in luxury dealerships had income growth ranging from 3 to 17 percent; one out of nine key positions saw their compensation fall by 17 percent (Figure 3).

REGION 7: WEST SOUTH CENTRAL – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National All-Dealer Average
All Positions	**$83,774**	**↑ 4%**	**105%**	**$82,440**	**$79,383**	**$86,209**	**$80,025**
General Manager/Operator	$472,362	↑16%	112%	$352,258	$427,554	$550,765	$423,179
Sales Manager	$162,327	↑6%	107%	$158,573	$145,758	$172,653	$151,075
F&I Manager	$176,110	↑3%	110%	$132,310	$153,219	$195,487	$159,618
Service Manager	$142,246	↓ 10%	107%	$138,059	$128,132	$152,739	$133,260
Parts Manager	$122,774	↓ 6%	116%	$112,835	$106,482	$137,177	$105,701
Sales Consultant	$85,504	↑11%	105%	$87,771	$75,523	$89,254	$81,150
Service Advisor/Writer	$75,649	↑6%	102%	$76,582	$70,850	$77,505	$74,104
B-Service Technician	$65,284	↑3%	99%	$63,484	$63,375	$66,518	$65,661
Parts Consultant	$57,479	↓ 2%	107%	$56,319	$55,178	$59,093	$53,747

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

REGION 7: WEST SOUTH CENTRAL – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)							
Position	**Overall Region Average**	**Year Over Year Change**	**Average as % of National**	**Low Volume**	**Medium Volume**	**High Volume**	**National Non-Luxury Average**
All Positions	**$81,985**	**↑ 6%**	**105%**	**$81,131**	**$76,527**	**$85,194**	**$78,129**
General Manager/Operator	$477,624	↑21%	114%	$298,766	$441,701	$593,505	$419,635
Sales Manager	$157,709	↑4%	108%	$164,378	$138,644	$166,753	$146,638
F&I Manager	$174,872	↑5%	112%	$135,568	$151,301	$196,182	$155,541
Service Manager	$137,950	↓ 6%	109%	$137,541	$125,667	$147,956	$126,801
Parts Manager	$121,676	↓ 4%	119%	$111,704	$104,746	$137,218	$101,989
Sales Consultant	$80,211	↑9%	105%	$89,009	$68,306	$83,032	$76,604
Service Advisor/Writer	$70,376	↑7%	103%	$73,378	$65,766	$72,006	$68,223
B-Service Technician	$64,902	↑6%	103%	$63,629	$62,224	$66,442	$62,752
Parts Consultant	$57,819	↑2%	110%	$56,910	$55,065	$60,066	$52,521

Low volume: < 503 units (new) **Medium: 503 to 1,121 units** **High volume: > 1,121 units**

REGION 7: WEST SOUTH CENTRAL – CARS – LUXURY DEALERSHIPS (FIGURE 3)						
Position	**Overall Region Average**	**Year Over Year Change**	**Average as % of National**	**Low Volume**	**High Volume**	**National Luxury Average**
All Positions	**$89,208**	**0%**	**100%**	**$92,224**	**$88,881**	**$89,197**
General Manager/Operator	$459,310	↑ 3%	109%	*	$444,904	$423,179
Sales Manager	$178,688	↑ 13%	108%	$151,359	$183,470	$166,098
F&I Manager	$180,253	↓ 3%	102%	$98,184	$188,714	$176,382
Service Manager	$151,964	↓ 17%	101%	*	$153,399	$151,163
Parts Manager	$126,019	↓ 11%	108%	*	$126,480	$117,001
Sales Consultant	$101,982	↑ 17%	105%	$77,340	$104,514	$96,757
Service Advisor/Writer	$89,286	↑ 7%	101%	$87,390	$89,465	$88,786
B-Service Technician	$66,127	↓ 7%	92%	$61,484	$66,563	$72,089
Parts Consultant	$56,634	↓ 11%	99%	$53,818	$57,026	$57,117

Low volume: < 595 units (new) **High volume: > 595 units**

REGION 8
MOUNTAIN

Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming

Compensation statistics of interest:

The Mountain region's all-dealerships, all-positions average income of $82,694 was 3 percent higher than the national average of $80,825 and ranked third out of the nine regions (Figure 1). There was 15.3 percent difference ($12,284) among the regions, from lowest overall average to highest.

Seven out of nine key dealership positions earned incomes equal to or higher than their respective national averages (Figure 1).

Six of the nine key positions in non-luxury dealerships saw their income grow.(Figure 2).

Six of the nine key positions in luxury dealerships had income growth ranging from 3 to 17 percent; parts managers and parts consultant both had their compensation fall 3 percent.(Figure 3).

REGION 8: MOUNTAIN – CARS – ALL DEALERSHIPS (FIGURE 1)							
Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National All-Dealer Average
All Positions	**$82,694**	**↑9%**	**103%**	**$81,145**	**$80,213**	**$84,512**	**$80,025**
General Manager/Operator	$534,933	↑ 48%	126%	$364,372	$414,565	$792,973	$423,179
Sales Manager	$156,995	↑ 14%	104%	$145,292	$147,425	$165,526	$151,075
F&I Manager	$164,598	↑ 6%	103%	$140,858	$155,874	$179,824	$159,618
Service Manager	$146,510	↑ 7%	110%	$122,002	$143,687	$162,744	$133,260
Parts Manager	$114,374	0%	108%	$95,355	$112,918	$129,641	$105,701
Sales Consultant	$78,499	↑ 9%	97%	$79,984	$78,742	$77,911	$81,150
Service Advisor/Writer	$75,400	↑ 6%	102%	$73,048	$74,249	$77,114	$74,104
B-Service Technician	$64,019	↑ 1%	97%	$61,393	$65,077	$64,561	$65,661
Parts Consultant	$58,126	↓ 2%	108%	$54,658	$58,398	$59,472	$53,747

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

REGION 8: MOUNTAIN – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)							
Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National Non-Luxury Average
All Positions	**$81,421**	**↑10%**	**104%**	**$79,986**	**$74,714**	**$84,261**	**$78,129**
General Manager/Operator	$554,776	↑ 56%	132%	$363,082	$357.328	$823,788	$419,635
Sales Manager	$156,925	↑ 16%	107%	$149,556	$138,951	$166,238	$146,638
F&I Manager	$164,134	↑ 6%	106%	$140,528	$148,051	$180,238	$155,541
Service Manager	$143,372	↑ 7%	113%	$118,487	$128,631	$163,191	$126,801
Parts Manager	$112,045	0%	110%	$89,197	$105,934	$129,935	$101,989
Sales Consultant	$76,565	↑ 10%	100%	$80,075	$70,162	$77,616	$76,604
Service Advisor/Writer	$72,847	↑ 6%	107%	$67,573	$69,560	$76,038	$68,223
B-Service Technician	$61,964	0%	99%	$59,300	$59,292	$63,812	$62,752
Parts Consultant	$57,407	↓ 1%	109%	$54,032	$55,216	$59,394	$52,521

Low volume: < 503 units (new) **Medium: 503 to 1,121 units** **High volume: > 1,121 units**

REGION 8: MOUNTAIN – CARS – LUXURY DEALERSHIPS (FIGURE 3)						
Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	High Volume	National Luxury Average
All Positions	**$91,383**	**↑ 5%**	**102%**	**$89,682**	**$92,712**	**$89,197**
General Manager/Operator	$450,603	↑ 17%	106%	$413,504	$483,337	$423,179
Sales Manager	$157,425	↑ 3%	95%	$139,339	$168,091	$166,098
F&I Manager	$170,445	↑ 4%	97%	$181,957	$165,169	$176,382
Service Manager	$168,905	↑ 10%	112%	$169,551	$168,366	$151,163
Parts Manager	$128,252	↓ 3%	110%	$128,982	$127,633	$117,001
Sales Consultant	$93,089	↑ 3%	96%	$93,840	$92,477	$96,757
Service Advisor/Writer	$88,325	↑ 5%	99%	$88,823	$87,885	$88,786
B-Service Technician	$74,343	0%	103%	$72,374	$75,701	$72,089
Parts Consultant	$62,709	↓ 3%	110%	$61,549	$63,736	$57,117

Low volume: < 595 units (new) **High volume: > 595 units**

REGION 9
PACIFIC

Alaska, California, Hawaii, Oregon and Washington

Compensation statistics of interest:

The Pacific region's all-dealerships, all-positions average income of $86,237 was 7 percent higher than the national average of $80,825 and ranked the highest of the nine regions (Figure 1). There was 15.3 percent difference ($12,284) among the regions, from lowest overall average to highest.

Nine of the nine key dealership positions earned incomes higher than their respective national averages (Figure 1).

Seven of the nine key positions in non-luxury dealerships saw income growth ranging from 1 to 25 percent; sales manager and service advisor/writer compensation both increased by 8 percent (Figure 2)

Three out of nine key positions in luxury dealerships had income growth ranging from 2 to 11 percent; one of the key positions saw income decline by 5 percent (Figure 3).

REGION 9: PACIFIC – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National All-Dealer Average
All Positions	**$86,237**	**↑ 8%**	**107%**	**$84,052**	**$85,682**	**$88,459**	**$80,825**
General Manager/Operator	$433,721	↑ 16%	102%	$384,799	$428,483	$506,604	$423,179
Sales Manager	$166,834	↑ 6%	110%	$156,030	$162,902	$179,472	$151,075
F&I Manager	$167,521	↑ 6%	105%	$151,695	$159,224	$185,390	$159,618
Service Manager	$150,840	↓ 2%	113%	$131,969	$157,649	$166,066	$133,260
Parts Manager	$115,379	↓ 3%	109%	$99,179	$117,182	$132,890	$105,701
Sales Consultant	$89,229	↑ 5%	110%	$90,659	$87,969	$89,056	$81,150
Service Advisor/Writer	$86,063	↑ 7%	116%	$81,004	$87,763	$88,259	$74,014
B-Service Technician	$69,425	↑ 1%	106%	$67,740	$70,194	$70,101	$65,661
Parts Consultant	$57,248	↓ 1%	107%	$54,291	$57,512	$59,737	$53,747

(↑) Represent year-over-year increases or *favorable* changes; (↓) represent unfavorable changes

REGION 9: PACIFIC – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)							
Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	Medium Volume	High Volume	National Non-Luxury Average
All Positions	**$82,166**	**↑ 9%**	**105%**	**$82,141**	**$78,387**	**$84,962**	**$78,129**
General Manager/Operator	$424,159	↑ 25%	101%	$383,111	$362,514	$558,365	$419,635
Sales Manager	$161,348	↑ 8%	110%	$157,527	$145,872	$176,556	$146,638
F&I Manager	$161,247	↑ 9%	104%	$150,406	$147,128	$179,141	$155,541
Service Manager	$140,929	↑ 1%	111%	$131,347	$134,319	$158,440	$126,801
Parts Manager	$110,437	↓ 2%	108%	$97,942	$108,002	$129,012	$101,989
Sales Consultant	$80,704	↑ 14%	105%	$84,732	$77,038	$79,963	$76,604
Service Advisor/Writer	$77,054	↑ 8%	113%	$76,389	$73,350	$80,167	$68,223
B-Service Technician	$64,621	↑ 2%	103%	$63,666	$63,915	$65,878	$62,752
Parts Consultant	$55,216	0%	105%	$53,009	$56,263	$56,692	$52,521

Low volume: < 503 units (new) **Medium: 503 to 1,121 units** **High volume: > 1,121 units**

REGION 9: PACIFIC – CARS – LUXURY DEALERSHIPS (FIGURE 3)						
Position	Overall Region Average	Year Over Year Change	Average as % of National	Low Volume	High Volume	National Luxury Average
All Positions	**$93,356**	**↑ 4%**	**105%**	**$89,514**	**$94,966**	**$89,197**
General Manager/Operator	$449,893	0%	106%	$411,703	$475,808	$423,179
Sales Manager	$177,322	↑ 2%	107%	$156,476	$185,691	$166,098
F&I Manager	$182,063	↓ 1%	103%	$157,843	$191,821	$176,382
Service Manager	$169,781	↓ 3%	112%	$140,284	$183,103	$151,163
Parts Manager	$124,785	↓ 5%	107%	$109,154	$133,179	$117,001
Sales Consultant	$105,889	↑ 11%	109%	$105,134	$106,229	$96,757
Service Advisor/Writer	$99,205	↑ 4%	112%	$90,983	$102,316	$88,786
B-Service Technician	$76,071	↓ 1%	106%	$73,698	$77,117	$72,089
Parts Consultant	$60,417	↓ 3%	106%	$56,654	$62,079	$57,117

Low volume: < 595 units (new) **High volume: > 595 units**

VII. Dealership Retention and Turnover in 2020: Cars

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).

This section contains retention and turnover statistics for each of the **nine key positions** in car dealerships in each of the nine regions. There are three tables for the nation and for each region – all dealerships, all non-luxury franchise dealerships and all luxury franchise dealerships. We report annualized turnover, year-over-year change (percentage), one-year retention, three-year retention, and median tenure. Finally, we include a retention and turnover analysis for all positions nationally.

To calculate the ***annualized turnover*** rate, we divide the total number of terminations reported for the 2020 calendar year by the total active head count reported as of December 31, 2020. Year-over-year decreases or *favorable* changes in turnover are represented with green arrows (↓), while increases or *unfavorable* changes are represented with red arrows (↑).

One-year retention is reported as the percentage of active employees (as of December 31, 2020) 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, 2020 and 22 percent were hired in calendar 2020.

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.

National Retention and Turnover – Key Positions

NATIONAL RETENTION AND TURNOVER – CARS – ALL DEALERSHIPS

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**46%**	0%	**77%**	**51%**	**3.1**
General Manager/Operator	13%	↓6%	93%	79%	9.6
Sales Manager	26%	↓7%	85%	62%	4.5
F&I Manager	34%	↓7%	82%	56%	3.6
Service Manager	24%	↓1%	88%	70%	6.0
Parts Manager	15%	↑ 2%	93%	81%	10.9
Sales Consultant	67%	↓13%	69%	39%	2.1
Service Advisor/Writer	45%	↓3%	76%	47%	2.7
B-Service Technician	30%	↑ 2%	84%	60%	4.0
Parts Consultant	27%	↑ 6%	85%	65%	5.1

NATIONAL RETENTION AND TURNOVER – CARS – NON-LUXURY DEALERSHIPS

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**49%**	**0%**	**76%**	**49%**	**2.9**
General Manager/Operator	14%	↓8%	93%	77%	8.9
Sales Manager	28%	↓8%	85%	61%	4.4
F&I Manager	35%	↓8%	82%	57%	3.7
Service Manager	25%	↓1%	87%	67%	5.6
Parts Manager	17%	↑3%	93%	80%	10.8
Sales Consultant	72%	↓15%	67%	38%	1.9
Service Advisor/Writer	49%	↓4%	74%	44%	2.4
B-Service Technician	32%	↑1%	83%	58%	3.9
Parts Consultant	29%	↑7%	85%	64%	5.0

NATIONAL RETENTION AND TURNOVER – CARS – LUXURY DEALERSHIPS

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**38%**	↑ 3%	**80%**	**55%**	**3.6**
General Manager/Operator	13%	↑3%	94%	82%	10.8
Sales Manager	21%	↓2%	87%	66%	4.6
F&I Manager	29%	↓6%	81%	55%	3.6
Service Manager	21%	↑ 4%	92%	77%	6.9
Parts Manager	12%	↑ 2%	95%	85%	11.5
Sales Consultant	47%	↓7%	74%	44%	2.5
Service Advisor/Writer	33%	↑2%	82%	56%	3.6
B-Service Technician	24%	↑4%	86%	62%	4.2
Parts Consultant	23%	↑ 6%	87%	68%	5.5

National Retention and Turnover – All Positions

NATIONAL RETENTION AND TURNOVER – CARS – ALL DEALERSHIPS					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**46%**	**0%**	**77%**	**51%**	**3.1**
MANAGEMENT POSITIONS					
Dealer Principal/Owner	4%	↑3%	99%	97%	28.9
General Manager/Operator	13%	↓5%	93%	79%	9.6
Controller/Business Manager	11%	0%	94%	84%	10.7
General Sales Manager	21%	↓10%	89%	70%	6.3
Fixed Operations Director	15%	↑2%	87%	74%	8.9
Executive Assistant	16%	↓3%	89%	80%	7.8
ADMINISTRATIVE POSITIONS					
Admin/Office Manager	17%	0%	93%	82%	9.7
Accountant/Accting. Manager	12%	↑2%	92%	82%	9.6
Human Resources Manager	23%	↑9%	87%	71%	6.4
Payroll Manager	17%	↓2%	92%	72%	6.2
Clerical Staff: AP/AR/Title	33%	↑2%	84%	60%	4.3
Cashier	77%	↑2%	66%	33%	1.7
Receptionist/Switchboard	82%	↑20%	61%	30%	1.5
SALES POSITIONS					
Sales Manager	26%	↓7%	85%	62%	4.5
Used/CPO Sales Manager	25%	↓10%	89%	71%	6.2
Fleet/Commercial Sales Manager	22%	↑6%	87%	70%	7.2
F&I Director/Producer	34%	↓ 7%	82%	56%	3.6
F&I Asst/Document Specialist	31%	↓4%	80%	51%	3.1
Internet Sales/BDC Manager	48%	↑11%	69%	38%	2.0
Sales Closer/Team Leader	19%	↓11%	88%	66%	4.9
Sales Consultant	67%	↓13%	69%	39%	2.1
Internet Sales Consultant	59%	0%	74%	46%	2.7
Product Specialist	81%	↑24%	69%	34%	1.8
BDC Rep/CSR/Scheduler	72%	↓8%	58%	27%	1.4
CSI/Client Relations Manager	27%	0%	90%	69%	6.2
Advertising/Marketing Manager	34%	↑10%	82%	53%	3.4
U/C Reconditioning Tech	87%	↑37%	50%	28%	0.7
Dealer Trade Driver	29%	↑11%	85%	53%	3.5
Car Buyer	29%	↑13%	85%	67%	5.8
SERVICE POSITIONS					
Service Manager	24%	↑1%	88%	70%	5.9
Express/Quick Lube Manager	33%	↑9%	82%	55%	3.7

NATIONAL RETENTION AND TURNOVER – CARS – ALL DEALERSHIPS					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
Shop Foreman/Asst. Manager	23%	↑9%	91%	78%	7.8
Service Advisor/Writer	45%	↓3%	76%	47%	2.7
A-Tech/Master/Team Leader	18%	↑2%	90%	73%	7.1
B-Service Technician	30%	↑ 2%	84%	60%	4.0
C-Tech/Apprentice/Trainee	41%	↓ 3%	72%	33%	1.9
D-Tech/Hourly Lube Tech	81%	↑14%	55%	19%	1.2
Dispatcher	36%	↑9%	89%	70%	5.9
Warranty Administrator	24%	↑6%	90%	73%	6.2
Detail/PDI/Prep Manager	66%	↑28%	67%	40%	1.9
Appointment Coordinator	67%	↑ 15%	65%	32%	1.7
Porter/Lot Person/Detailer	73%	↑5%	65%	37%	1.8
Courtesy Shuttle Driver	66%	↑44%	76%	50%	3.0
Rental Staff	39%	↓5%	71%	35%	2.0
PARTS POSITIONS					
Parts Manager	15%	↑2%	93%	81%	10.9
Warehouse/Asst Parts Manager	19%	↑1%	91%	75%	9.3
Wholesale Parts Sales	20%	↑3%	89%	71%	6.7
Parts Consultant	27%	↑6%	85%	65%	5.1
Parts Driver	49%	↑8%	75%	45%	2.6
Parts Shipper/Receiver	62%	↑22%	80%	42%	2.4
Parts Stockperson	56%	↑13%	68%	41%	2.0
BODY SHOP POSITIONS					
Body Shop Manager	19%	↓1%	90%	70%	6.2
Body Shop Foreman	25%	↑7%	96%	81%	9.9
Estimator/Advisor	38%	↓7%	77%	51%	3.1
B/S Admin Support	48%	↑2%	79%	53%	3.3
A-Tech/Master Metal-Paint	22%	0%	87%	67%	5.6
B-Tech/Metal/Painter	32%	↑4%	84%	63%	4.6
C-Tech/Apprentice/Trainee	45%	↑4%	83%	61%	4.5
D-Tech/Helper/Detailer	61%	↑8%	69%	41%	2.1
MISCELLANEOUS POSITIONS					
IT Systems/Network Manager	24%	↑7%	87%	76%	6.8
Website Manager/Webmaster	23%	↓5%	86%	66%	4.9
Maintenance/Janitor	31%	↓1%	82%	62%	4.9

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 1
NEW ENGLAND

Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont

Retention and turnover statistics of interest:

- At 58 percent, three-year retention in the New England region was seven points higher than the national all-dealerships average of 51 percent. New England ranked first among the regions in this important metric. New England was also ranked first in median tenure at 4.2 years (Figure 1).
- New England's annualized turnover of 42 percent for all positions in all dealerships was up 4 points compared to last year. Further, it was lower than the national all-dealerships rate of 46 percent, and lower still than the non-farm private-sector rate of 57 percent (Figure 1).
- Non-luxury dealership turnover went up three points to 42 percent, 7 points better than the national non-luxury rate of 49 percent; three-year retention and median tenure were significantly higher than the national non-luxury averages. (Figure 2).
- Luxury dealership turnover increased ten points to 45 percent; luxury dealership turnover was 7 points higher than the national luxury rate of 38 percent. Three-year retention and median tenure were higher than national luxury averages (Figure 3).

REGION 1: NEW ENGLAND – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**42%**	**↑ 4%**	**82%**	**58%**	**4.2**
General Manager/Operator	14%	↓ 10%	97%	91%	18.2
Sales Manager	44%	↑ 18%	89%	74%	6.7
F&I Manager	33%	*	89%	68%	4.6
Service Manager	26%	↓ 4%	96%	72%	8.7
Parts Manager	18%	↓ 4%	100%	80%	10.8
Sales Consultant	65%	↓ 2%	72%	47%	2.7
Service Advisor/Writer	45%	↑ 4%	80%	53%	3.9
B-Service Technician	32%	↓ 2%	85%	57%	3.7
Parts Consultant	30%	↑ 12%	85%	70%	6.4

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 1: NEW ENGLAND – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**42%**	**↑ 3%**	**82%**	**58%**	**1.5**
General Manager/Operator	22%	↓ 5%	96%	91%	22.5
Sales Manager	38%	↑ 8%	88%	72%	3.3
F&I Manager	34%	↓ 17%	89%	67%	4.6
Service Manager	30%	↓ 5%	94%	73%	8.9
Parts Manager	16%	↓ 10%	100%	80%	10.8
Sales Consultant	69%	↓ 6%	70%	45%	2.5
Service Advisor/Writer	44%	↓ 1%	80%	55%	4.3
B-Service Technician	35%	↑ 3%	81%	55%	3.5
Parts Consultant	31%	↑ 12%	87%	72%	6.7

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 1: NEW ENGLAND – CARS – LUXURY DEALERSHIPS (FIGURE 3)					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**45%**	**↑ 10%**	**85%**	**58%**	**4.2**
General Manager/Operator	*	*	100%	92%	17.3
Sales Manager	*	*	*	*	*
F&I Manager	*	*	*	*	*
Service Manager	15%	↓ 2%	100%	69%	7.6
Parts Manager	25%	↑ 12%	100%	83%	9.8
Sales Consultant	51%	0%	77%	55%	3.7
Service Advisor/Writer	45%	↑ 10%	79%	50%	2.6
B-Service Technician	25%	↑ 1%	93%	60%	4.8
Parts Consultant	*	*	*	*	*

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 2

MID-ATLANTIC

New Jersey, New York and Pennsylvania

Retention and turnover statistics of interest:

- The Mid-Atlantic all-positions, all-dealerships turnover rate was the fourth lowest of the nine regions, two points lower than the national all-dealerships rate of 46 percent, and 13 points lower than the non-farm private-sector rate of 57 percent (Figure 1).
- Moreover, three-year retention at 52 percent was one point lower than the national dealership average and the third highest region in this important metric. Mid-Atlantic also has the third highest median tenure at 3.2 years (Figure 1).
- Non-luxury dealership turnover went up 3 points to 41 percent, 8 points better than the national non-luxury rate of 49 percent; three-year retention and median tenure were higher than the national non-luxury averages. (Figure 2).
- Luxury dealership turnover increased 19 points to 53 percent, 15 points higher than the national luxury rate of 38 percent; three-year retention and median tenure were lower than the national luxury averages (Figure 3).

REGION 2: MID-ATLANTIC – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**44%**	**↑ 7%**	**85%**	**52%**	**3.2**
General Manager/Operator	17%	↑ 3%	94%	76%	9.0
Sales Manager	32%	↑ 6%	89%	65%	4.9
F&I Manager	35%	↓ 2%	83%	48%	2.8
Service Manager	25%	↑ 2%	88%	66%	5.4
Parts Manager	11%	↓ 1%	97%	82%	13.7
Sales Consultant	47%	↓ 1%	76%	43%	2.7
Service Advisor/Writer	42%	↓ 1%	80%	50%	3.1
B-Service Technician	34%	↑ 9%	87%	62%	3.9
Parts Consultant	28%	↑ 4%	88%	67%	5.2

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 2: MID-ATLANTIC – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**41%**	**↑ 3%**	**81%**	**53%**	**3.3**
General Manager/Operator	15%	0%	95%	73%	7.9
Sales Manager	26%	0%	89%	69%	5.2
F&I Manager	32%	↓ 5%	83%	49%	2.8
Service Manager	18%	↓ 6%	87%	64%	4.3
Parts Manager	8%	*	96%	82%	12.6
Sales Consultant	48%	↑ 5%	76%	43%	2.6
Service Advisor/Writer	43%	↓ 2%	80%	48%	2.8
B-Service Technician	30%	↑ 4%	87%	62%	3.8
Parts Consultant	25%	0%	88%	68%	5.2

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 2: MID-ATLANTIC – CARS – LUXURY DEALERSHIPS (FIGURE 3)					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**53%**	**↑ 19%**	**80%**	**50%**	**3.1**
General Manager/Operator	21%	↑ 8%	94%	82%	12.3
Sales Manager	47%	↑ 20%	88%	58%	4.3
F&I Manager	46%	↑ 5%	81%	44%	2.7
Service Manager	47%	↑ 30%	92%	72%	9.9
Parts Manager	19%	↑ 7%	100%	81%	14.4
Sales Consultant	45%	↑ 2%	77%	42%	2.7
Service Advisor/Writer	39%	↑ 11%	80%	57%	3.9
B-Service Technician	45%	↑ 23%	88%	62%	4.3
Parts Consultant	36%	↑ 16%	90%	62%	5.1

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 3

EAST NORTH CENTRAL

Illinois, Indiana, Michigan, Ohio and Wisconsin

Retention and turnover statistics of interest:

- At 55 percent, three-year retention in the East North Central region was four points higher than the national all-dealerships average of 51 percent. This region ranked second in this important metric (Figure 1).
- East North Central's annualized turnover for all positions in all dealerships increased to 43 percent, it was lower than the national all-dealerships rate of 46 percent, and lower still than the non-farm private-sector rate of 57 percent (Figure 1).
- Five key positions in non-luxury dealerships saw increased turnover, and four key positions saw improvement. Three out of nine luxury key positions saw decreased turnover, with sales manager showing the largest turnover decrease (Figures 2 and 3).
- Non-luxury dealership turnover at 44 percent was four points lower than the national non-luxury average, while three-year retention and median tenure were higher than the national non-luxury averages. (Figure 2).
- Luxury dealership turnover was one point lower than the national luxury average; both three-year retention and median tenure were slightly above the national luxury averages. (Figure 3).

REGION 3: EAST NORTH CENTRAL – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**43%**	**↑ 2%**	**79%**	**55%**	**3.7**
General Manager/Operator	11%	↓ 4%	95%	88%	11.5
Sales Manager	26%	↓ 1%	88%	70%	5.7
F&I Manager	33%	↓ 5%	86%	64%	4.3
Service Manager	25%	↑ 5%	87%	74%	7.3
Parts Manager	19%	↑ 5%	96%	82%	12.0
Sales Consultant	49%	↓ 8%	78%	51%	3.2
Service Advisor/Writer	47%	↑ 1%	76%	49%	2.8
B-Service Technician	27%	↓ 5%	85%	64%	4.7
Parts Consultant	35%	↑ 11%	85%	66%	5.4

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 3: EAST NORTH CENTRAL – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**44%**	**↑ 2%**	**79%**	**55%**	**3.7**
General Manager/Operator	11%	↓ 5%	94%	87%	11.5
Sales Manager	29%	↑ 1%	87%	69%	5.6
F&I Manager	34%	↓ 6%	86%	63%	4.3
Service Manager	26%	↑ 5%	87%	73%	7.5
Parts Manager	20%	↑ 5%	95%	83%	12.7
Sales Consultant	50%	↓ 8%	78%	51%	3.2
Service Advisor/Writer	50%	↑ 2%	74%	47%	2.6
B-Service Technician	28%	↓ 5%	84%	63%	4.6
Parts Consultant	36%	↑ 10%	85%	65%	5.3

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

REGION 3: EAST NORTH CENTRAL – CARS – LUXURY DEALERSHIPS (FIGURE 3)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**37%**	**↑ 5%**	**80%**	**56%**	**3.8**
General Manager/Operator	14%	*	100%	96%	11.4
Sales Manager	6%	↓ 9%	98%	74%	7.5
F&I Manager	23%	↑ 9%	94%	69%	4.4
Service Manager	21%	↑ 8%	82%	79%	6.2
Parts Manager	11%	↑ 6%	96%	74%	8.1
Sales Consultant	40%	↓ 4%	81%	53%	3.4
Service Advisor/Writer	27%	↓ 2%	86%	59%	3.6
B-Service Technician	24%	↑ 4%	92%	72%	5.1
Parts Consultant	27%	↑ 14%	88%	71%	5.9

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

REGION 4

WEST NORTH CENTRAL

Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota

Retention and turnover statistics of interest:

- At 49 percent, three-year retention in the West North Central region was two points lower than the national all-dealerships average of 51 percent (Figure 1).
- West North Central annual turnover rate for all positions in all dealerships increased four points to 43 percent, three points lower than the national all-dealerships turnover rate of 46 percent and 11 points lower than the non-farm private-sector rate of 57 percent. This region was tied for second for the lowest turnover of the nine regions. (Figure 1).
- Non-luxury dealership turnover increased four points to 44 percent, but was still lower than the national non-luxury average; three-year retention and median tenure were the same as the national non-luxury averages (Figure 2).
- Luxury dealership turnover increased 4 points to 38 percent; this equals the national luxury average, and three-year retention was lower than the national luxury average (Figure 3).

REGION 4: WEST NORTH CENTRAL – CARS – ALL DEALERSHIPS (FIRGURE 1)

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**43%**	**↑ 4%**	**74%**	**49%**	**2.9**
General Manager/Operator	14%	↑ 2%	92%	72%	10.5
Sales Manager	24%	↑ 8%	86%	61%	4.1
F&I Manager	44%	↑ 7%	79%	57%	3.8
Service Manager	20%	↑ 3%	90%	72%	6.0
Parts Manager	19%	↑ 8%	94%	79%	9.7
Sales Consultant	59%	↓ 6%	63%	36%	1.6
Service Advisor/Writer	38%	↓ 4%	76%	47%	2.7
B-Service Technician	20%	↓ 5%	86%	64%	4.4
Parts Consultant	25%	↑ 5%	82%	59%	4.3

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 4: WEST NORTH CENTRAL – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**44%**	**↑ 4%**	**73%**	**48%**	**2.8**
General Manager/Operator	14%	↑ 1%	92%	75%	12.4
Sales Manager	27%	↑ 10%	86%	62%	4.8
F&I Manager	39%	↑ 4%	82%	60%	3.9
Service Manager	20%	↑ 3%	88%	71%	6.1
Parts Manager	21%	↑ 11%	93%	78%	10.6
Sales Consultant	62%	↓ 7%	61%	34%	1.5
Service Advisor/Writer	44%	↓ 1%	73%	43%	2.4
B-Service Technician	22%	↓ 5%	83%	63%	4.5
Parts Consultant	27%	↑ 6%	81%	57%	3.8

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

REGION 4: WEST NORTH CENTRAL – CARS – LUXURY DEALERSHIPS (FIGURE 3)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**38%**	**↑ 4%**	**79%**	**53%**	**3.3**
General Manager/Operator	13%	↑ 3%	92%	67%	4.7
Sales Manager	12%	↓ 3%	86%	55%	3.2
F&I Manager	61%	↑ 14%	66%	47%	2.3
Service Manager	22%	↑ 8%	96%	78%	5.9
Parts Manager	12%	0%	96%	84%	7.3
Sales Consultant	50%	0%	71%	42%	2.2
Service Advisor/Writer	21%	↓ 7%	84%	58%	3.9
B-Service Technician	13%	↓ 8%	93%	66%	4.3
Parts Consultant	19%	↑ 2%	86%	66%	4.6

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

REGION 5

SOUTH ATLANTIC

Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia

Retention and turnover statistics of interest:

- South Atlantic annualized turnover rate for all positions in all dealerships decreased three points to 44 percent, two points higher than the national all-dealership turnover rate of 46 percent and 13 points lower than the non-farm private-sector rate of 57 percent (Figure 1).
- At 51 percent, three-year retention was the same as the national all-dealerships average. (Figure 1).
- Sales consultants in the all dealership average saw annual turnover decrease 12 points to 69 percent. Sales consultants in non-luxury dealerships saw their turnover decrease 14 points to 77 percent (Figures 1 and 2).
- Non-luxury dealership turnover decreased 5 points to 48 percent; three-year retention and median tenure were slightly lower than the national non-luxury averages (Figure 2).
- Luxury dealership turnover increased 2 points at 33 percent; three-year retention and median tenure were higher than the national luxury average (Figure 3).

REGION 5: SOUTH ATLANTIC – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**44%**	**↓ 3%**	**77%**	**51%**	**3.1**
General Manager/Operator	10%	↓ 10%	95%	78%	9.9
Sales Manager	24%	↓ 14%	85%	59%	4.2
F&I Manager	28%	↓ 17%	84%	57%	3.7
Service Manager	22%	↓ 3%	90%	69%	6.1
Parts Manager	9%	↓ 3%	93%	82%	11.4
Sales Consultant	69%	↓ 12%	67%	38%	1.9
Service Advisor/Writer	42%	↓ 9%	77%	47%	2.7
B-Service Technician	28%	0%	85%	59%	4.0
Parts Consultant	22%	0%	86%	66%	5.2

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 5: SOUTH ATLANTIC – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**48%**	**↓ 5%**	**75%**	**48%**	**2.8**
General Manager/Operator	11%	↓ 17%	94%	73%	8.4
Sales Manager	27%	↓ 18%	84%	56%	3.7
F&I Manager	29%	↓ 20%	83%	55%	3.5
Service Manager	27%	↓ 4%	87%	63%	5.1
Parts Manager	25%	↑ 10%	85%	63%	4.6
Sales Consultant	77%	↓14%	64%	35%	1.7
Service Advisor/Writer	47%	↓13%	73%	42%	2.3
B-Service Technician	32%	0%	83%	56%	3.7
Parts Consultant	25%	↑ 2%	85%	63%	4.6

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 5: SOUTH ATLANTIC – CARS – LUXURY DEALERSHIPS (FIGURE 3)					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**33%**	**↑ 2%**	**84%**	**60%**	**4.2**
General Manager/Operator	8%	↑ 5%	98%	88%	13.7
Sales Manager	15%	↓ 4%	91%	72%	5.4
F&I Manager	24%	↓ 6%	88%	63%	4.4
Service Manager	11%	↓ 3%	97%	84%	9.8
Parts Manager	7%	↑ 1%	97%	93%	15.2
Sales Consultant	42%	↓ 7%	78%	48%	2.7
Service Advisor/Writer	29%	0%	85%	59%	3.9
B-Service Technician	21%	↑ 2%	88%	65%	4.6
Parts Consultant	18%	↓ 2%	89%	74%	6.8

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 6

EAST SOUTH CENTRAL

Alabama, Kentucky, Mississippi and Tennessee

Retention and turnover statistics of interest:

- The East South Central region's annual turnover rate for all positions in all dealerships remained the same at 54 percent, eight points higher than the national all-dealerships turnover rate of 46 percent and three points lower than the U.S. non-farm private-sector turnover rate of 57 percent (Figure 1).
- At 48 percent, three-year retention was three points lower than the national all-dealerships average (Figure 1).
- Non-luxury dealership turnover decreased three points to 57 percent; three-year retention and median tenure were lower than the national non-luxury averages (Figure 2).
- Luxury dealership turnover went up 14 points to 42 percent; three-year retention and median tenure were both higher than the national luxury averages (Figure 3).

REGION 6: EAST SOUTH CENTRAL – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**54%**	**↑ 6%**	**73%**	**48%**	**2.8**
General Manager/Operator	24%	↑ 2%	82%	68%	6.9
Sales Manager	37%	↓ 9%	78%	56%	4.0
F&I Manager	29%	↓ 12%	75%	43%	2.6
Service Manager	36%	↑ 7%	80%	61%	3.8
Parts Manager	16%	↓ 2%	87%	71%	6.9
Sales Consultant	85%	↓ 16%	63%	34%	1.6
Service Advisor/Writer	60%	↑ 7%	69%	44%	2.2
B-Service Technician	43%	↑ 9%	83%	62%	4.4
Parts Consultant	36%	↑ 14%	84%	67%	5.8

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 6: EAST SOUTH CENTRAL – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**57%**	**↓ 3%**	**72%**	**46%**	**2.6**
General Manager/Operator	26%	↓ 3%	77%	60%	4.9
Sales Manager	41%	↓ 12%	78%	53%	3.6
F&I Manager	28%	↓ 17%	75%	44%	2.6
Service Manager	45%	↑ 9%	75%	54%	3.3
Parts Manager	16%	↓ 3%	84%	65%	6.6
Sales Consultant	93%	↓ 22%	60%	31%	1.4
Service Advisor/Writer	67%	↑ 9%	67%	40%	1.8
B-Service Technician	48%	↑ 5%	80%	57%	3.9
Parts Consultant	35%	↑ 12%	84%	68%	6.3

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 6: EAST SOUTH CENTRAL – CARS – LUXURY DEALERSHIPS (FIGURE 3)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**42%**	**↑ 14%**	**80%**	**60%**	**4.0**
General Manager/Operator	14%	*	100%	100%	11.7
Sales Manager	21%	↑ 8%	79%	68%	5.3
F&I Manager	31%	↑ 8%	75%	41%	2.3
Service Manager	*	*	100%	92%	7.9
Parts Manager	14%	↓ 2%	100%	93%	8.4
Sales Consultant	52%	↑ 17%	75%	47%	2.7
Service Advisor/Writer	38%	↑ 1%	78%	57%	3.5
B-Service Technician	30%	↑ 12%	90%	73%	5.3
Parts Consultant	38%	↑ 25%	83%	65%	4.0

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 7
WEST SOUTH CENTRAL

Arkansas, Louisiana, Oklahoma and Texas

Retention and turnover statistics of interest:

- The West South Central annual turnover rate for all positions in all dealerships decreased seven points to 46 percent, this was the same as the national all-dealerships turnover rate and 11 points lower than the U.S. non-farm private-sector rate of 57 percent (Figure 1).
- At 48 percent, three-year retention was three points lower than the national all-dealerships average, and median tenure was slightly lower than the national all-dealerships average.
- Sales consultant annualized turnover stands out in all categories, particularly in non-luxury dealerships at 84 percent (Figures 1, 2 and 3).
- Non-luxury dealership all-positions turnover decreased nine points to 49 percent; three-year retention and median tenure were lower than the national non-luxury averages. (Figure 2).
- Luxury dealership turnover remained the same at 37 percent; three-year retention and median tenure were lower than the national luxury averages (Figure 3).

REGION 7: WEST SOUTH CENTRAL – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**46%**	**↓ 7%**	**74%**	**48%**	**2.8**
General Manager/Operator	15%	↓ 5%	89%	72%	7.2
Sales Manager	29%	↓ 7%	84%	58%	3.9
F&I Manager	39%	↓ 3%	76%	51%	3.2
Service Manager	30%	↑ 2%	88%	64%	4.6
Parts Manager	25%	↑ 11%	90%	82%	10.8
Sales Consultant	78%	↓ 27%	63%	34%	1.6
Service Advisor/Writer	52%	0%	73%	43%	2.5
B-Service Technician	28%	↓ 3%	81%	54%	3.4
Parts Consultant	29%	↑ 10%	84%	61%	4.4

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

REGION 7: WEST SOUTH CENTRAL – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**49%**	**↓ 9%**	**74%**	**47%**	**2.7**
General Manager/Operator	14%	↓ 9%	89%	69%	6.2
Sales Manager	30%	↓ 6%	83%	57%	3.8
F&I Manager	43%	0%	76%	51%	3.2
Service Manager	28%	↓5%	86%	60%	4.2
Parts Manager	24%	↑ 7%	90%	81%	11.8
Sales Consultant	84%	↓29%	61%	32%	1.6
Service Advisor/Writer	54%	↓7%	72%	40%	2.3
B-Service Technician	29%	↓ 6%	81%	55%	3.5
Parts Consultant	29%	↑ 8%	82%	60%	4.3

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 7: WEST SOUTH CENTRAL – CARS –LUXURY DEALERSHIPS (FIGURE 3)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**37%**	**0%**	**77%**	**52%**	**3.3**
General Manager/Operator	17%	↑ 6%	89%	77%	10.1
Sales Manager	26%	↓ 10%	87%	63%	4.3
F&I Manager	28%	↓ 12%	75%	50%	3.0
Service Manager	35%	↑ 18%	92%	75%	6.2
Parts Manager	27%	↑ 22%	90%	84%	6.9
Sales Consultant	50%	↓ 16%	68%	40%	1.9
Service Advisor/Writer	46%	↑ 16%	75%	53%	3.5
B-Service Technician	25%	↑ 2%	82%	52%	3.2
Parts Consultant	26%	↑ 5%	88%	64%	4.9

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 8

MOUNTAIN

Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming

Retention and turnover statistics of interest:

- Mountain region annual turnover rate for all positions in all dealerships stayed the same at 54 percent, eight points higher than the national all-dealerships turnover rate of 46 percent, and three points lower than the U.S. non-farm private-sector rate. This region had the highest turnover of the nine regions (Figure 1).
- Three-year retention at 50 percent was one point lower than the national average (Figure 1).
- Six of the key positions showed decreases in turnover. At 91 percent, sales consultants in non-luxury dealerships had the 2nd highest annualized turnover (Figures1, 2 and 3).
- Non-luxury dealership turnover increased one point to 56 percent; median tenure was lower than the national non-luxury average. (Figure 2).
- Luxury dealership turnover decreased one point to 43 percent; three-year retention and median tenure were higher than the national luxury averages (Figure 3).

REGION 8: MOUNTAIN – CARS – ALL DEALERSHIPS (FIGURE 1)

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**54%**	**0%**	**76%**	**50%**	**2.9**
General Manager/Operator	12%	↓ 6%	96%	87%	11.2
Sales Manager	22%	↓ 14%	89%	67%	5.3
F&I Manager	31%	↓ 5%	85%	64%	4.5
Service Manager	15%	↓ 7%	90%	74%	6.3
Parts Manager	13%	↑ 1%	95%	87%	10.5
Sales Consultant	86%	↓ 13%	69%	37%	1.8
Service Advisor/Writer	46%	↓ 8%	76%	48%	2.8
B-Service Technician	33%	↑ 3%	85%	61%	4.2
Parts Consultant	27%	↑ 9%	88%	67%	5.6

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 8: MOUNTAIN – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**56%**	**↑ 1%**	**75%**	**49%**	**2.8**
General Manager/Operator	12%	↓ 7%	95%	86%	11.2
Sales Manager	21%	↓ 18%	88%	66%	5.2
F&I Manager	31%	↓ 6%	85%	64%	4.5
Service Manager	15%	↓ 6%	89%	72%	6.2
Parts Manager	15%	↑ 1%	94%	87%	10.5
Sales Consultant	91%	↓ 12%	68%	36%	1.7
Service Advisor/Writer	48%	↓ 6%	74%	45%	2.6
B-Service Technician	34%	↑ 3%	84%	59%	3.9
Parts Consultant	27%	↑ 8%	87%	66%	5.3

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

REGION 8: MOUNTAIN – CARS – LUXURY DEALERSHIPS (FIGURE 3)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**43%**	**↓1%**	**84%**	**58%**	**3.9**
General Manager/Operator	11%	↑ 1%	97%	92%	11.1
Sales Manager	24%	↑ 8%	91%	78%	5.3
F&I Manager	33%	↑ 10%	90%	68%	4.4
Service Manager	16%	↓ 14%	96%	92%	7.5
Parts Manager	4%	*	100%	92%	9.6
Sales Consultant	53%	↓11%	79%	45%	2.7
Service Advisor/Writer	35%	↓15%	97%	59%	3.7
B-Service Technician	28%	↑ 3%	90%	68%	4.6
Parts Consultant	12%	0%	93%	70%	5.7

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

REGION 9
PACIFIC

Alaska, California, Hawaii, Oregon and Washington

Retention and turnover statistics of interest:

- The Pacific region annual turnover rate for all positions in all dealerships increased four points to 47 percent, one point higher than the national all-dealerships rate of 46 percent (Figure 1).
- At 50 percent, three-year retention was one point lower than the national all-dealerships average and median tenure, at 2.9 years, was equal to the national all-dealerships average. It is interesting to note that, despite average retention, this region had one of the highest average compensations. This supports other research that shows pay is not a strong motivator and driver of employee engagement and retention (Figure 1).
- Non-luxury dealership turnover increased seven points to 53 percent, four points over the national non-luxury rate; three-year retention and median tenure were also lower than the national non-luxury averages (Figure 2).
- Luxury dealership turnover remained the same at 36 percent, two points below the national luxury rate; three-year retention and median tenure were slightly lower than the national luxury averages (Figure 3).

REGION 9: PACIFIC – CARS – ALL DEALERSHIPS (FIGURE 1)					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**47%**	**↑ 4%**	**75%**	**50%**	**2.9**
General Manager/Operator	14%	↓ 7%	93%	77%	8.0
Sales Manager	26%	↓ 7%	82%	59%	4.0
F&I Manager	39%	↓ 2%	78%	55%	3.4
Service Manager	26%	↑ 5%	86%	70%	5.9
Parts Manager	17%	↑ 4%	91%	80%	9.3
Sales Consultant	60%	↓ 10%	61%	38%	2.0
Service Advisor/Writer	43%	↑ 2%	77%	48%	2.8
B-Service Technician	31%	↑ 9%	82%	59%	3.8
Parts Consultant	27%	↑ 8%	83%	63%	4.8

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 9: PACIFIC – CARS – NON-LUXURY DEALERSHIPS (FIGURE 2)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**53%**	**↑ 7%**	**74%**	**48%**	**2.8**
General Manager/Operator	16%	↓ 7%	94%	80%	8.6
Sales Manager	30%	↓ 5%	83%	60%	4.1
F&I Manager	45%	↑ 2%	79%	56%	3.5
Service Manager	30%	↑ 9%	87%	73%	5.9
Parts Manager	22%	↑ 12%	92%	81%	9.2
Sales Consultant	65%	↓ 11%	67%	37%	1.9
Service Advisor/Writer	52%	↑ 6%	75%	45%	2.5
B-Service Technician	37%	↑ 13%	83%	59%	3.8
Parts Consultant	30%	↑ 11%	84%	62%	4.7

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 9: PACIFIC – CARS – LUXURY DEALERSHIPS (FIGURE 3)					
Position	**Annualized Turnover**	**Year Over Year Change**	**One Year Retention**	**Three Year Retention**	**Median Tenure**
All Positions	**36%**	**0%**	**77%**	**52%**	**3.2**
General Manager/Operator	11%	↓ 6%	91%	72%	7.1
Sales Manager	19%	↓ 9%	81%	58%	3.7
F&I Manager	26%	↓ 10%	78%	52%	3.3
Service Manager	18%	↓ 4%	83%	66%	5.0
Parts Manager	19%	0%	89%	80%	5.8
Sales Consultant	51%	↓ 6%	64%	36%	1.7
Service Advisor/Writer	30%	↓ 2%	80%	53%	3.3
B-Service Technician	23%	↑ 4%	81%	60%	3.8
Parts Consultant	21%	↑ 3%	83%	65%	4.8

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

VIII. Medium and Heavy Duty Truck Data

This section contains charts and analyses for eight key positions in truck dealerships in six of the nine regions. Region 1 (New England), Region 8 (Mountain) and Region 9 (Pacific) did not meet minimum data requirements to produce regional truck dealership statistics. The data show compensation according to the overall average for the region, average as a percent of the U.S., and the average for all U.S. dealers.

For calculating average values for each job title, valid records were required from a minimum of five rooftops and a minimum of 10 data points (payroll records) for each job title in the five rooftops. Asterisks (*) indicate insufficient information in the body of truck tables. A NOTE following the national statistics indicates those job titles where insufficient information was provided for valid calculations.

In the compensation tables, year-over-year increases or *favorable* changes in compensation are represented with green arrows (↑), while decreases or *unfavorable* changes are represented with red arrows (↓).

In the retention and turnover tables, year-over-year decreases or *favorable* changes in turnover are represented with green arrows (↓), while increases or *unfavorable* changes are represented with red arrows (↑).

Due to the limited amount of data collected from truck dealerships, we weren't able to provide truck statistics for low-volume and high-volume dealerships at a regional level, or for most of the positions at a national level. You will find high- and low-volume statistics for the nine key dealership positions in **Section IV—General Findings and Conclusions.**

REGION 2
MID-ATLANTIC

New Jersey, New York and Pennsylvania

Statistics of interest:

- The Mid-Atlantic region's all-position average compensation decreased 6 percent to $67,822; 4 percent below the national average (Figure 1).
- Annualized turnover for all positions in this region decreased 1 percent and they are the lowest of the six regions in this report with 18 percent (Figure 2).

REGION 2: MID-ATLANTIC – TRUCKS – COMPENSATION

Position	Overall Region Average	Year Over Year Change	Average as % of National	National All-Dealer Average
All Positions	**$67,822**	**↓6%**	**96%**	**$70,812**
General Manager/Operator	$139,337	↓17%	74%	$188,932
Sales Manager	*	*	*	$155,840
Service Manager	$91,579	↓6%	95%	$95,920
Parts Manager	$91,478	↓14%	97%	$94,310
Sales Consultant	$144,411	↓13%	116%	$124,052
Service Advisor/Writer	$54,101	↓1%	94%	$57,448
B- Tech	$53,139	↓10%	89%	$59,893
Parts Consultant	$51,599	↓5%	82%	$62,769

(↑) Represent year-over-year decreases or *favorable* changes; (↓) represent unfavorable changes

REGION 2: MID-ATLANTIC – TRUCKS – RETENTION AND TURNOVER

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**18%**	**↑ 1%**	**89%**	**67%**	**6.4**
General Manager/Operator	13%	↓1%	100%	93%	10.5
Sales Manager	*	*	*	*	*
Service Manager	10%	↑ 4%	95%	85%	6.0
Parts Manager	5%	↓4%	100%	84%	10.7
Sales Consultant	17%	↑ 9%	87%	73%	1.9
Service Advisor/Writer	24%	↑ 7%	91%	53%	3.7
B- Tech	42%	↑ 18%	76%	38%	2.3
Parts Consultant	12%	↑ 6%	96%	79%	8.3

(↓) Represent year-over-year decreases or *favorable* changes; (↑) represent unfavorable changes

REGION 3
EAST NORTH CENTRAL

Illinois, Indiana, Michigan, Ohio and Wisconsin

Statistics of interest:

- The East North Central region's all-position average compensation increased 1 percent, and was 2 percent below the national average (Figure 1).
- Annualized turnover for all positions in this region increased 3 percent to an overall rate of 24 percent; B-Techs showed the greatest rise in turnover, at 14 percent year-over-year (Figure 2).

REGION 3: EAST NORTH CENTRAL – TRUCKS – COMPENSATION

Position	Overall Region Average	Year Over Year Change	Average as % of National	National All-Dealer Average
All Positions	**$69,308**	**↑ 1%**	**98%**	**$70,812**
General Manager/Operator	$214,473	↑ 21%	114%	$188,932
Sales Manager	$163,804	↑ 7%	105%	$155,840
Service Manager	$84,104	↓ 20%	88%	$95,920
Parts Manager	$82,791	↓ 11%	88%	$94,310
Sales Consultant	$136,754	↑7%	110%	$124,052
Service Advisor/Writer	$52,197	↓ 1%	91%	$57,448
B- Tech	$59,680	↓ 6%	95%	$62,769
Parts Consultant	$52,288	↓ 7%	92%	$57,050

(↑) Represent year-over-year <u>decreases</u> or *favorable* changes; (↓) represent unfavorable changes

REGION 3: EAST NORTH CENTRAL – TRUCKS – RETENTION AND TURNOVER

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**24%**	**↑3%**	**88%**	**62%**	**4.9**
General Manager/Operator	13%	↑7%	92%	67%	7.9
Sales Manager	5%	↑1%	95%	67%	4.6
Service Manager	13%	↓ 1%	87%	66%	6.5
Parts Manager	9%	*	97%	85%	13.7
Sales Consultant	15%	↓ 1%	92%	63%	5.4
Service Advisor/Writer	26%	↑6%	80%	61%	4.0
B- Tech	32%	↑14%	85%	50%	3.0
Parts Consultant	18%	↑3%	91%	65%	5.3

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

REGION 4

WEST NORTH CENTRAL

Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota

Statistics of interest:

- The West North Central region's all-position average compensation decreased 2 percent to $67,021 and was 5 percent below the national average (Figure 1).
- Annualized turnover for all positions in this region decreased 2 percent to an overall rate of 25 percent, which was tied for the third highest rate of turnover among the seven regions (Figure 2).

REGION 4: WEST NORTH CENTRAL – TRUCKS – COMPENSATION

Position	Overall Region Average	Year Over Year Change	Average as % of National	National All-Dealer Average
All Positions	**$67,021**	**↓ 2%**	**95%**	**$70,812**
General Manager/Operator	$175,753	*	93%	$188,932
Sales Manager	$121,860	↑ 8%	78%	$155,840
Service Manager	$95,756	↓ 11%	100%	$95,920
Parts Manager	$89,172	↓ 4%	95%	$94,310
Sales Consultant	$113,046	↑ 2%	91%	$124,052
Service Advisor/Writer	$59,250	↓ 1%	103%	$57,448
B- Tech	$58,768	↓ 3%	94%	$62,769
Parts Consultant	$56,349	↑ 3%	99%	$57,050

(↑) Represent year-over-year <u>decreases</u> or *favorable* changes; (↓) represent unfavorable changes

REGION 4: WEST NORTH CENTRAL – TRUCKS – RETENTION AND TURNOVER

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**25%**	**↓ 2%**	**86%**	**61%**	**5.1**
General Manager/Operator	*	*	*	*	*
Sales Manager	8%	0%	100%	85%	9.4
Service Manager	9%	↓ 5%	94%	88%	9.4
Parts Manager	18%	↑9%	90%	77%	7.3
Sales Consultant	25%	↑13%	90%	72%	6.9
Service Advisor/Writer	36%	↓ 6%	83%	55%	3.4
B- Tech	37%	↑19%	81%	57%	3.9
Parts Consultant	15%	↓ 4%	90%	65%	5.5

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

REGION 5
SOUTH ATLANTIC

Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia

Statistics of interest:

- South Atlantic region's all-position average compensation decreased slightly to 68,705, 3 percent lower than the national average (Figure 1).
- Annualized turnover for all positions in this region decreased 1 percent to an overall rate of 25 percent. Figure 2).

REGION 5: SOUTH ATLANTIC – TRUCKS – COMPENSATION

Position	Overall Region Average	Year Over Year Change	Average as % of National	National All-Dealer Average
All Positions	**$68,705**	**0%**	**97%**	**$70,812**
General Manager/Operator	$192,328	*	102%	$188,932
Sales Manager	$127,076	*	82%	$155,840
Service Manager	$99,968	↑ 3%	104%	$95,920
Parts Manager	$95,782	↑ 2%	102%	$94,310
Sales Consultant	$125,284	↑ 16%	101%	$124,052
Service Advisor/Writer	$56,592	↑ 2%	99%	$57,448
B- Tech	$61,883	↑ 12%	99%	$62,769
Parts Consultant	$58,521	↑ 2%	103%	$57,050

(↑) Represent year-over-year <u>decreases</u> or *favorable* changes; (↓) represent unfavorable changes

REGION 5: SOUTH ATLANTIC – TRUCKS – RETENTION AND TURNOVER

Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**25%**	**↓ 1%**	**83%**	**56%**	**3.7**
General Manager/Operator	5%	↓ 6%	89%	68%	6.5
Sales Manager	8%	*	92%	75%	11.8
Service Manager	13%	↓ 2%	90%	75%	7.2
Parts Manager	7%	↓ 1%	98%	83%	7.2
Sales Consultant	18%	↑1%	82%	60%	4.5
Service Advisor/Writer	30%	↑6%	76%	38%	2.3
B- Tech	35%	↑1%	80%	48%	2.8
Parts Consultant	18%	↓ 7%	90%	67%	5.3

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

REGION 6
EAST SOUTH CENTRAL

Alabama, Kentucky, Mississippi and Tennessee

Statistics of interest:

- The Pacific region's all-position average compensation increased 15 percent and was $80,932, 14 percent higher than the national average (Figure 1).
- Annualized turnover for all positions in this region increased 28 percent at 47 percent, this was the highest among the six groups (Figure 2).

REGION 6: EAST SOUTH CENTRAL – TRUCKS – COMPENSATION				
Position	Overall Region Average	Year Over Year Change	Average as % of National	National All-Dealer Average
All Positions	**$80,932**	**↑ 15%**	**114%**	**$70,812**
General Manager/Operator	*	*	*	$188,932
Sales Manager	*	*	*	$155,840
Service Manager	*	*	*	$95,920
Parts Manager	*	*	*	$94,309
Sales Consultant	$129,791	↑ 12%	105%	$124,052
Service Advisor/Writer	*	*	*	$57,448
B- Tech	$68,769	↑ 33%	110%	$62,421
Parts Consultant	$56,953	↑ 12%	100%	$57,050

(↑) Represent year-over-year <u>decreases</u> or *favorable* changes; (↓) represent unfavorable changes

REGION 6: EAST SOUTH CENTRAL– TRUCKS – RETENTION AND TURNOVER					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**47%**	**↑28%**	**71%**	**47%**	**2.7**
General Manager/Operator	*	*	*	*	*
Sales Manager	*	*	*	*	*
Service Manager	30%	*	80%	60%	3.9
Parts Manager	18%	↑7%	64%	55%	3.9
Sales Consultant	32%	↑4%	87%	65%	3.7
Service Advisor/Writer	48%	↑32%	43%	29%	0.8
B- Tech	66%	↑36%	60%	41%	2.1
Parts Consultant	29%	↑14%	76%	57%	4.7

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

REGION 7
WEST SOUTH CENTRAL

Arkansas, Louisiana, Oklahoma and Texas

Statistics of interest:

- The West South Central region's all-position average compensation increased 2 percent to $71,483, 1 percent higher than the national average (Figure 1).
- Annualized turnover for all positions in this region went up 10 percent to 43 percent, and the region had the second highest turnover rate among the six groups (Figure 2).

REGION 7: WEST SOUTH CENTRAL – TRUCKS – COMPENSATION				
Position	Overall Region Average	Year Over Year Change	Average as % of National	National All-Dealer Average
All Positions	**$71,483**	**↑ 2%**	**101%**	**$70,812**
General Manager/Operator	*	*	*	$188,932
Sales Manager	*	*	*	$155,840
Service Manager	$97,386	↑ 9%	102%	$95,920
Parts Manager	$104,224	*	111%	$94,310
Sales Consultant	$94,613	↓ 25%	76%	$124,052
Service Advisor/Writer	*	*	*	$57,448
B- Tech	*	*	*	$62,769
Parts Consultant	$54,602	↑ 16%	96%	$57,050

(↑) Represent year-over-year <u>decreases</u> or *favorable* changes; (↓) represent unfavorable changes

REGION 7: WEST SOUTH CENTRAL – TRUCKS – RETENTION AND TURNOVER					
Position	Annualized Turnover	Year Over Year Change	One Year Retention	Three Year Retention	Median Tenure
All Positions	**43%**	**↑ 10%**	**80%**	**51%**	**3.1**
General Manager/Operator	*	*	*	*	*
Sales Manager	*	*	*	*	*
Service Manager	30%	↑ 13%	100%	80%	6.9
Parts Manager	7%	*	100%	72%	3.7
Sales Consultant	29%	↑ 21%	82%	59%	3.2
Service Advisor/Writer	35%	↓ 32%	76%	29%	2.2
B- Tech	58%	↓ 27%	75%	44%	2.5
Parts Consultant	40%	↑ 28%	88%	55%	3.5

(↓) Represent year-over-year <u>decreases</u> or *favorable* changes; (↑) represent unfavorable changes

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