

Canadian Tourism Human Resource Council (CTHRC)

Study of Survey Methodology & Compensation Comparison

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I. Study Scope and Comparison Methodology

Background

The Canadian Tourism Human Resource Council (CTHRC) is pleased to present the *Survey Methodology & Compensation Comparison Study*. This study, through the services of Hay Group, analyzes the methodology, scope and results of compensation studies conducted by tourism operators, associations, human resource managers / specialists, and consultants within the Canadian tourism sector. The objective is to identify significant similarities and differences relative to the base study, the **2006 Canadian Tourism Sector Compensation Study**. Through this analysis, the CTHRC hopes to learn from other approaches and have a better understanding of all of the relevant studies.

A critical outcome of this study is to identify potential partnerships with relevant survey administrators, in order to assist in the CTHRC's overall objective of developing a uniform nationwide compensation study for the tourism sector.

Participating Studies

In December 2007, extensive research was conducted to identify appropriate compensation surveys from the tourism sector to review in this comparison study. In addition to the CTHRC study, a total of nine studies were reviewed in this project:

- Alberta Hotel & Lodging Association - 2007 Wage Survey
- Association des restaurateurs du Québec - Sondage sur les salaires 2007
- Association des stations de ski du Québec - Enquête salariale Saison 2005-2006
- Canadian Museums Association - National Compensation Survey 2000/2001
- Canadian Restaurant and Foodservices Association - 2007 Confidential Chain Compensation Survey
- Greater Toronto Hotel Association - Benefit Compensation Survey 2000
- National Golf Course Owners Association Canada - 2003 Compensation and Benefits Report
- Service Canada - National Job Futures 2006
- Statistics Canada - Human Resource Module of the Tourism Satellite Account 2005

Data Collection

In January and February of 2008, data were gathered from the nine studies for comparison to the base study. The CTHRC made initial contacts with the study organizations, confirmed their interest in participating, and obtained copies of the studies and contact information for data clarification.

Hay Group reviewed the studies and contacted the participating study organizations to collect additional details, such as questionnaires and data submission materials used for the surveys and any other related methodology documents. In order to gather missing components and further understand the studies, Hay Group arranged telephone interviews with the participants to confirm data, methodology, and definitions.

Processing

Several survey parameters were identified as comparison categories. They included Study Scope, Compensation Data, Descriptive Parameters, Market Analyses Details, Statistics Details, Supplementary Analyses, Bonus / Benefits Analyses, Study Launch Details, Collection Tool / Follow-up / Users, and Future Plans.

The content of each study was coded, mapped, and analyzed against a backdrop of the comparison categories. The methodology comparison tables are presented in Section V.

The Job / Occupation Data Comparison is limited to a total of five occupations with a sample from each industry as outlined in the *2006 Canadian Tourism Sector Compensation Study*. The Job / Occupation Data Comparison is presented in Section IV.

Challenges / Assumptions

Although most study administrators were very helpful in supplying study reports and other sources of information, some challenges nevertheless were encountered during the study. These challenges and their solutions / assumptions are outlined below:

1. Most of the studies are a few years apart from the base study. This makes it difficult to compare wage and salary data when their effective dates are vastly different. Front line occupations in the tourism sector are mostly impacted by minimum wages. They typically have higher employee turnover every year and tend to be seasonal in nature. The compensation values published in this study are used “as is” since indexing the figures to the base study year may overestimate what the actual compensation levels would have been.
2. Not all studies provide a glossary of terminology and definitions. This makes interpretation of the information difficult. In order to ensure that the correct meaning is captured for the differences in terminology, follow-up contact with study sponsors was made for further clarification.
3. Job match is especially challenging when benchmark descriptions for jobs and occupations are unavailable for several studies. Job matching for the five selected jobs / occupations from the surveys against the base study’s benchmark jobs was performed with utmost caution to ensure the appropriateness of the matches.
4. Some studies are restrictive regarding the release of their methodology, data, and submission materials. One study’s report is unavailable for review entirely, and data collection on this study relies solely on e-mail correspondence. This means that data are limited, and misinterpretations of that data may occur as a result.

Study Overview

This study provides a summary and analysis of the methodology and compensation data collected from nine different tourism industry compensation studies. The participating studies are disparate in their focus – they review different jobs and occupations, cover different geographies, target different participants and draw data from different industries – however, comparing their methodological approaches

provides valuable insight.

This report provides a section on Differences and Similarities Analysis, which details key similarities and differences, and provides comments and recommendations to the CTHRC for addressing key areas. As forming partnerships for future studies is a critical objective for this study, Section III focuses specifically on recommendations around partnerships and their impact on the base study. Section IV presents a comparison of compensation data values for five occupations. Section V contains comparison tables which summarize methodological components across all studies reviewed. Finally, Section VI provides an overview of each of the nine comparator studies.

This report is intended to be valuable in the design of future national compensation surveys in the tourism sector.

Executive Summary

In comparing the base study with the comparator group, as expected, both similarities and differences emerged. Highlights are outlined in this section, followed by a high level summary of recommendations. Detailed comments and recommendations are outlined in Section II: Differences and Similarities Analysis.

Similarities: Areas where the base study is consistent with the comparator group include: minimum publication requirement, weighting approach used, provision of a participant profile, an executive summary, and benefits and bonus analysis.

Differences: Reviewing the comparator group also clearly highlights some areas of strength for the base study. For example, the data collected within the base study is more comprehensive and rigorous, as indicated by the breadth of compensation elements reviewed, by gathering individual incumbent data not averages, and by gathering full-time/part-time/seasonal job data or union/non-union job data. Additionally, the number of statistics published and the number of market cuts provided are greater than the comparator group. Providing pay administration policy data and human resources issue data is not common within the comparator group.

When considering the overall approach utilized by the studies again, the base study's approach is more comprehensive and rigorous. This is indicated by using sampling statistics when creating participant lists, by the significant degree of chasing of participants to ensure participation, and by the data verification process followed with all participants.

Finally, the base study's data submission materials are differentiated from the comparator group, as the base study is the only study that has the questionnaire online, and is the only study with an interactive database where participants can perform their own cuts of the market.

Recommendations: A summary list of recommendations is provided below to highlight some of the key recommendations resulting from the report. The recommendations listed below, as well as additional suggestions are elaborated upon throughout Section II.

1. Review key parts of the study with participants and stakeholders to ensure that the study materials are meeting their specific needs. Particular areas to consider include the jobs reviewed and the cuts of data, e.g., geography, seasonal employee breakdown and union / non-union classification.
2. Revise human resource issues in the questionnaire with each iteration of the study, and utilize it more proactively to tap into key issues and needs of stakeholders.
3. Consider partnerships with key associations. Creating these partnerships would assist with increasing participation, would decrease the amount of manpower required by the CTHRC and partnering Human Resource Organizations, and would help build momentum and credibility for the national study.
4. Consider conducting the study every two years, and consider running an abbreviated study in between years.
5. To address participation rate, define a comprehensive pre-launch plan with each partnering Human Resource Organization to identify multiple opportunities for participants to receive communications about the study (newsletters, magazines, websites, regular meetings, etc.). This plan needs to be launched in advance of the study launch.
6. Spend some time gathering data and formulating a position on “what’s in it for the participants.” This message should be emphasized in the marketing materials, and is intended to help increase the participation rate.
7. Consider what additional incentives would be attractive to participants. Again, this action is intended to help increase participation rates. For example, a feedback session to present the final report would help participants understand some of the key data messages.
8. Consider delivering final data reports online.

The base study compares strongly to the comparator studies; however, some areas have been identified in order to further strengthen and improve the base study if addressed.

Acknowledgements

The CTHRC and Hay Group would like to thank the Advisory Committee and all participating associations and organizations involved in the development of this comparison study, for not only sharing the information from their studies, but also for having the time and patience to explain and discuss the characteristics specific to their studies.

II. Differences and Similarities Analysis

Qualitative Comparison

This section provides a qualitative analysis comparing the characteristics outlined in the Comparator Methodology At a Glance tables presented in Section V. While the tables present easy-to-read matrices with parameters mapped and coded, this section uses a qualitative approach highlighting the differences and similarities of the comparative parameters, and provides analysis and recommendations based on the comparison.

Acronyms and full names of the sponsor associations for the studies analyzed are listed below. Other acronyms discussed are also shown below.

Study Sponsor	Name of Association and Study
CTHRC (base study)	Canadian Tourism Human Resource Council 2006 Canadian Tourism Sector Compensation Study: National
AHLA	Alberta Hotel & Lodging Association 2007 Wage Survey
ARQ	Association des restaurateurs du Québec Sondage sur les salaires 2007
ASSQ	Association des stations de ski du Québec Enquête salariale Saison 2005-2006
CMA	Canadian Museums Association National Compensation Survey 2000/2001
CRFA	Canadian Restaurant and Foodservices Association 2007 Confidential Chain Compensation Survey
GTHA	Greater Toronto Hotel Association Benefit Compensation Survey 2000
NGCOA Canada	National Golf Course Owners Association Canada 2003 Compensation and Benefits Report
Service Canada	Service Canada National Job Futures 2006
Statistics Canada	Statistics Canada Human Resource Module of the Tourism Satellite Account 2005
Other	Name
COPS	Canadian Occupational Projection System
CTC	Canada Tourism Council
HHRPA	Hospitality Human Resource Professionals Association
HRM	Human Resource Module
HRSDC	Human Resources and Social Development Canada
LFS	Labour Force Survey
NGS	National Graduate Survey
SNA	Systems of National Accounts
TSA	Tourism Satellite Account

Accom
F & B
R & E

Accommodation
Food & Beverage Services
Recreation & Entertainment

Study Scope

This section reviews the parameters relating to study scope. These parameters show that the scope of the base study is different from most of the comparator group. Seven studies are from single industry associations covering jobs from their respective industries.

Year of Study – While the effective dates of the studies vary greatly, ranging from 2000 to 2007, two-thirds (6 studies) are within 2 years difference from the base study, 2006.

Industry – The base study surveys 3 industries (Accommodation, Food and Beverage Services, Recreation and Entertainment) while the majority of the studies represent single industries. HRM is composed of all 5 tourism industries including Transportation and Travel Services in the tourism sector, and National Job Futures makes no distinction on business sectors – tourism sector data are embedded.

Jobs / Occupations – There are some differences in terms of the number of jobs surveyed, most ranging from 13 to 61, with National Job Futures going as high as 265 jobs. The base study focuses on 27 jobs / occupations. Some studies focus on jobs, some on occupations (a cluster of similar jobs) while some others have a mix of both. The GTHA study does not survey job specific data as it reviews total compensation for all jobs combined

In terms of position levels, the majority of studies represent a combination of executive, management and front line positions.

Most of the comparator studies reported that they make slight adjustments to their list of jobs / occupations surveyed year over year, based on input from their targeted organizations.

Comment/Recommendation: Study administrators commented that it is challenging to decide on the number of jobs to include. They have to balance including the most critical jobs with ensuring that the list of jobs will not discourage organizations from participating. With respect to position levels, study administrators reported that they focus on the levels that are of most interest to their participants, and consequently this differs from study to study. For example, the ARQ focuses more on front line occupations whereas the NGCOA Canada understand that participating organizations are most interested in executive and management data. The base study covers a number and range of position levels comparable to most studies. However, it is recommended that the CTHRC review the jobs to be included in the future study to ensure that the jobs are perceived as critical by the participating organizations within each industry. Conducting a feedback survey targeting the base study’s participants would gather useful input for the next study.

Geography / Regions – While 6 studies, including the base study, provide data by geographic locations and sub-regions, 4 studies do not provide a breakdown of the data by location.

Comment/Recommendation: The base study falls at the more robust end of the spectrum by providing provincial and several regional breakdowns of the data. This has in the past been seen by the partnering Human Resource Organizations as a valuable characteristic. It is worthwhile for the CTHRC to confirm that regional breakdowns are still of value to the partnering Human Resource Organizations.

Number of Targeted Participants – With the exception of the HRM and National Job Futures whose targets are individual paid workers, all other studies target overall tourism organizations for data submission. The number of targeted participants varies greatly for each comparator study. This number is greatly influenced by association membership as most studies target their membership lists.

Comment/Recommendation: The base study was not limited by membership in identifying a targeted number of participants, and so it used statistical sampling principles to define its targeted participant numbers. This approach was designed to ensure that each cut of data would have sufficient participation. In partnering with other associations in future studies, this more rigorous approach to sampling should be maintained. Additionally, the CTHRC should consider methods to sample organizations that may not be members of partnering associations.

Number of Actual Participants and Incumbents – Reported response rates (percentage of invited organizations completing questionnaires) range from 4% to 56%. The actual response rate for the base study is unavailable, but is estimated to be around 33%. Interestingly, two comparator organizations were pleased with their response rates (the NGCOA Canada study at 41% and the ASSQ study at 56%), while the ARQ would have been happier with a doubled response rate (to 8%), and the AHLA would have been more pleased with a somewhat higher response rate of 67%.

Among the comparator studies, most do not show the number of incumbents included. Only the base study, the GTHA report, and the NGCOA Canada report capture the number of incumbents.

Comment/Recommendation: All association study administrators reported that as an incentive to participate they provide a copy of the final report to participants, either complimentary or for a reduced fee. Several study administrators commented that they have to extend study deadlines in order to increase participation numbers. This is in line with the base study's experience. Several study administrators reported that they make revisions to their questionnaire in an effort to increase participation. It is recommended that the CTHRC review elements of their questionnaire with their target populations to ensure that it is collecting the most critical data, and providing the types of data most useful to participants. Additional comments on increasing response rates are addressed under the Study Launch Details section.

Compensation Data

This section reviews the parameters relating to compensation data. Review of these parameters highlights that the depth and quality of the data collected in the base study is greater than data collected in most of the comparator studies.

Compensation Elements – There is not a single common compensation element among the studies. Four, including the base study, collect base salary/wage data, 2 others collect minimum and maximum salary/wage only, 2 others are based on total cash compensation, and 1 study measures total benefits compensation. Almost half (4 studies) collect salary range minimum and maximum.

Comment/Recommendation: In general, the rationale for the compensation elements included is related to the desired length of the questionnaire, and impacted by how participants plan to use the data collected. These decisions must be made with the understanding that by simplifying the questionnaire, data depth and quality are impacted. Some associations report conducting an abbreviated compensation study in alternate years. Given the CTHRC's desire to have a comprehensive compensation and benefits study, a change in compensation elements surveyed is not recommended at this time.

Gratuities Treatment – Gratuities / tips are not usually included in compensation values except for 2 studies. The GTHA study includes gratuities as part of total benefits compensation and the HRM allocates gratuities to selected industries, therefore including tips as part of total cash compensation. While the base study offers qualitative analysis of gratuity earnings, the ARQ publishes gratuity values for specific jobs. In short, the similarity lies with the 5 studies that do not include gratuities at all.

Multiple Incumbents – The base study primarily collects individual salary data for jobs with multiple incumbents, but accepts average data when the participants are unable or unwilling to provide the individual values. Due to their targets being the individual paid workers, both the HRM and National Job Futures also use individual salary data. Almost all other studies collect average values.

Comment/Recommendation: This characteristic is a critical differentiator for the base study. Collecting individual incumbent salary data leads to greater accuracy and more robust data. From the participant perspective, submitting individual salary data could be more cumbersome and time consuming. It is recommended that the CTHRC educate participants on the value of submitting individual incumbent salary data.

Descriptive Parameters

This section reviews the descriptive parameters used in the base study. These parameters highlight once again that the base study includes descriptive parameters beyond those of the other studies.

Hourly / Weekly / Annual \$ Pay Basis – Hourly and annual dollars are both commonly used bases for reporting compensation data. The base study collects both hourly and salary data information, and reports each separately, depending on the choice of the participants when submitting data. Hourly wages are primarily for front line occupations while annual remuneration is used for executive, management and

full-time positions. The ASSQ reports weekly compensation for executive jobs.

Full-time / Part-time / Seasonal Job Data – The base study publishes separate data for all three employee categories. Five studies use full-time equivalent as the measure in their methodology. Three other studies do not make a distinction on employment status.

Union / Non-union Job Data – The majority (7 studies) do not distinguish between union and non-union compensation data, but the base study and the ASSQ report provide separate analyses for union and non-union employees. For the GTHA study the hourly analyses are composed of a one-third non-union and two-thirds union mix.

Comment/Recommendation: Most of the comparator studies do not distinguish full-time/part-time and seasonal job data, nor do they distinguish union versus non-union job data. It would be worthwhile for the CTHRC to confirm with the participants that this information is meaningful to them.

Benchmark Job Descriptions – Six studies, including the base study, provide job descriptions defining the scope and duties of the jobs surveyed. The other studies do not provide job descriptions. This parameter is irrelevant for the GTHA study which focuses on total benefits compensation and not job specific data.

Glossary / Definitions – Most studies (7), including the base study, offer some sort of glossary / definitions in their questionnaire materials and reports, to clarify and facilitate interpretation of terminologies. The HRM and National Job Futures have the most extensive definitions in their studies.

Market Analyses Details

This section reviews the parameters relating to the details of market analyses. Review of these parameters shows that the base study provides the highest number of market cuts, that it adheres to a minimum publication requirement similar to other studies, and that it publishes information on the number of observations.

Market Cuts – Except for National Job Futures offering 1 analysis per job, all other studies provide multiple market analyses for each surveyed job or occupation. The cuts are typically organized by geographical region, or organization profile parameter such as size, number of employees, etc. The number of market analyses offered varies from 1 (National Job Futures) to 310 (base study).

As the base study measures the quality of job match, it provides a separate analysis on “even match” data using only the solidly matched jobs, in addition to an analysis using all matches combined. The HRM differs from most studies as it also provides analyses by gender, age category and immigrant status, in addition to industry and employment status.

Comment/Recommendation: The base study’s significant number of market cuts has been seen in the past by the partnering Human Resource Organizations as a valuable characteristic. It is recommended that the CTHRC confirm that this is still of value to the partnering Human Resource Organizations.

Minimum Publication Requirement – The threshold minimum methodology in publishing information differs greatly among the studies. One study has no minimum threshold, while threshold minimums, where existing, range from 3 to 1,500. Two other studies report having no specific rules. The base study uses 4 as the minimum threshold, and market data are suppressed below this number.

Comment/Recommendation: The base study adheres to Hay Group’s consistent confidentiality guidelines to ensure that compensation studies contain the most useful information possible without compromising confidentiality of participants or data validity. This appears to be in line with most of the other studies.

Number of Observations Published – Half (5) of the studies, including the base study, publish the number of observations for each market analysis. The other half do not show these numbers in their reports. Including the number of observations with the published data allows users to review data presented within the appropriate context.

Statistics Details

This section reviews the parameters relating to the specific statistics reported. Review of these parameters indicates that the base study reports the broadest range of statistics, that data are weighted in a manner consistent with other studies.

Statistics Published – Average is the common measurement among all studies, and is the only available information for 5 studies. Other than average, the base study also publishes standard percentiles. Two other studies also provide percentile information. One other study provides the statistical minimum and maximum values.

Comment/Recommendation: The base study provides the broadest range of statistical information in comparison. It is worthwhile for the CTHRC to decide on whether this information is meaningful to them and the partnering Human Resource Organizations, and the appropriate statistical elements to be presented to participants.

Weighting Approach – This refers to the methodology of counting the number of observations when calculating the average or statistical values. The majority of the studies, including the base study, use the organization weighted approach in their analyses. For instance, the average salary information for a benchmark job (e.g., cook) is calculated using 15 organizations’ values (N=15), instead of using 38 individual cooks’ data from these 15 organizations. If the average is calculated using all 38 individual cooks’ data (N=38), this becomes an incumbent weighted approach. Both the HRM and National Job Futures employ the incumbent weighted approach.

Roll-up Approach – In the base study, in order to reduce sample bias, an organization submitting data for multiple operations is counted as one respondent if the operations have the same human resource policies. No other study is known to use this approach. This methodology does not apply to the HRM and National Job Futures since their data are based on individual jobs and employment records, not organizations.

Supplementary Analyses

This section reviews the parameters relating to supplementary analyses. Review of these parameters indicates that only 2 studies (base study, CMA) include all of the following supplementary analyses: participant profile, executive summary and commentary, pay administration policy, and additional human resource issues.

Participant Profile – Half (5) of the studies, including the base study, offer analysis on the participants’ organizational profile. Typical parameters analyzed include size of organization, employee workforce, etc. The other 50% of the studies do not feature participant profile in their reports.

Executive Summary / Commentary – Six studies, including the base study, provide executive summary or commentary analysis.

Pay Administration Policy – Analyses on pay administration policy such as overtime compensation, base salary progression policies, etc. are provided in 3 of the studies, including the base study. The other studies do not cover similar analyses.

Human Resource Issues – This section typically focuses on human resource challenges, e.g., hiring issues, retention, training, work/life balance, etc. The base study and 3 others provide a qualitative analysis in their reports.

Comment/Recommendation: This section within the study is a unique opportunity to gather information from participating organizations about key human resource issues they are currently facing. It can also be used to gather comments about the study itself, or to collect additional information to better help the partnering Human Resource Organizations meet the needs of their target audience.

Benefits / Bonus Analyses

This section reviews the parameters relating to benefits and bonus analyses. The base study is in line with the comparator studies, and thus no recommendations are provided.

Bonus / Incentives – Information regarding employee bonus and incentives is covered by 6 surveys, including the base study. Qualitative analysis is included in 4 of these studies.

Benefits / Perquisites – Six studies, including the base study, report on the provision of employee benefits and perquisites.

Benefits Values – The GTHA study, primarily a benefits report, offers extensive analysis on employee benefits values. The ASSQ publishes employee discount values, e.g., ski/lift tickets. The CMA report provides maximum values of benefits.

Study Launch Details

This section reviews the parameters relating to the details of the study launch. When reviewing target participants, and preparatory launch activities, it is clear that the CTHRC could benefit from partnering with some of these associations.

Target Participants – The primary target participants typically are members of the sponsor associations, thus these studies focus on single industry information. Studies sponsored by non-industry specific organizations such as the CTHRC and the HRM, target multiple industries within the tourism sector. National Job Futures captures the entire Canadian labour market and is not sector specific. The base study relies upon each partnering Human Resource Organization to define its own targeted participation list, and efforts are made to coordinate these lists nationally.

Comment/Recommendation: Industry specific associations have up-to-date contact information for all of their members, which provides a ready-made contact list for identifying target participants. Most study administrators also seem to have an awareness of the non-members within their industry and can identify means to target them. Partnering with these associations will allow CTHRC to benefit from the associations' membership lists and established relationships, and ultimately to increase participation rates.

Frequency of Study – Four studies, including the base study, have no established time schedule for their surveys. Five study sponsors conduct their studies annually, 2 of which conduct full studies every 2 or 3 years, but offer either an update or a shorter study in the years between.

Comment/Recommendation: Given the degree of change happening in compensation information within the tourism sector, and the data collected from participating organizations, it is recommended that the CTHRC collect compensation data every two years. This will allow for some time between studies so that participants do not feel overwhelmed, but it will also ensure that accurate and timely compensation data are available. One recommendation would be to conduct a shortened or “update” version of the full compensation study in alternating years as with the ASSQ and the CRFA. This type of study will not have the same in-depth data as the full compensation study. These recommendations fall in line with what some comparator studies are already doing.

Timing of Study – Timing of conducting surveys varies greatly among the sponsoring organizations, with surveys taking place in the winter, summer, spring or fall.

Comment/Recommendation: Several study administrators communicated that the time of year of their study launch has not been ideal, and that in future iterations, they would consider conducting the study in a different time of the year. There does not appear to be an “ideal” launch time, even when reviewing the studies by industry group. It does appear that most studies span two seasons, and deadlines have to be extended to reach a higher participant level. In comparison, the timing of the base study is at least in line with the comparator studies.

Preparatory Launch Activities and Report Marketing – All associations have some planned launch activities prior to sending out the actual questionnaire. Generally, information about the questionnaire is available on each association's website, and a written communication (either fax or e-mail) is sent to targeted organizations just prior to the dissemination of the actual questionnaire. The base study follows similar

preparatory activities. Conventions, conferences, workshops, trade magazines, newsletters, press releases, etc. are used by several sponsoring organizations as part of their marketing activities. In order to reach out to the youth community, marketing efforts for National Job Futures also involves sending free publications and promotional items to career counsellors in high schools, school boards, colleges, and universities.

Comment/Recommendation: Preparations for launching studies are generally eased by the associations already having a ready target list in the form of their membership list. Additionally, more opportunities for communicating to potential participants exist for the associations, e.g., regular meetings, newsletters, magazines, a regularly accessed website, etc. The base study does not presently have these same communication opportunities, however, partnering with some of these associations would allow the CTHRC to benefit from these opportunities.

Comment/Recommendation: Alternatively, even if the CTHRC does not partner with other associations in the next study, it is recommended that a detailed launch plan be created by reviewing launch activities undertaken by the comparator studies. Several study administrators commented that the next time they conduct their studies, they would begin launch activities earlier, and also broaden their activities.

Comment/Recommendation: As the CTHRC uses a variety of means to attract participants to the base study, it will be useful to ask how the participants found out about it. This would help the CTHRC evaluate the effectiveness of the various marketing avenues.

Collection Tool / Follow-up / Users

This section reviews the activities related to collecting data, the actual tool used, follow-up activities, and data users. The base study used data collection tools similar to the comparator studies, but dedicated more time and resources to participation follow-up / data chase and data verification activities.

Data Collection Tool / Tool Distribution – With the exception of the HRM and National Job Futures, whose data sources come from government databases, all other studies have to collect data from participants. All comparators use a mix of e-mail, mail or fax to distribute their questionnaires, with most organizations preferring to send out their study materials electronically. Most have their questionnaires downloadable from their websites. The base study follows a similar approach; however, one component of the base study is available for completion online.

Comment/Recommendation: At least one study administrator is considering an online questionnaire; however, none has yet made that change. Some study administrators comment that some participating organizations lack the technology to even return questionnaires electronically, i.e., no e-mail access. In fact, the NGCOA has included a hard copy of their 2008 questionnaire in their quarterly magazine because many participants demanded a hard copy version in 2007. It appears that the base study is ahead of the comparator studies by having

a component of their questionnaire which can be completed online.

Comment/Recommendation: For reference, for the base study, 67% of the participants' data were collected by participants e-mailing in their excel files, 23% were collected over the phone by Hay Group, and 10% were collected by fax/mail. It would be prudent to further review the preferences of participants before considering major changes to the data submission process.

Participation Follow-up / Data Chase – The CTHRC and the NGCOA Canada dedicated significant resources in their participation follow-up campaigns, which included multiple rounds of telephone calls, faxes, e-mails, and advertising. The NGCOA study had volunteers undertaking data chase telephone calls, and several Human Resource Organizations assisted the CTHRC with the follow-up in the base study. Several other comparators followed up with their targets to encourage participation, typically by telephone calls and reminders sent from association presidents. The ARQ does not follow up for participation. In the case of the HRM and National Job Futures, both Statistics Canada and Service Canada follow up with their data source government counterparts internally.

Comment/Recommendation: The significant efforts focused on following up with participants and chasing data could explain why the response rate for the base study is in line with the comparator studies, even though the latter has the advantage of targeting their own members.

Data Verification with Participants – There is no unified approach in this aspect. Extensive data verification happens with the base study as every participant has been contacted to either verify or collect any missing data. With the HRM and National Job Futures, extensive audit checks with the data source teams are also standard procedures. The rest of the studies vary from having no contact with the participants, removing anomalies, or deleting obvious errors, to confirming with the participants if necessary.

Comment/Recommendation: The base study's data verification process appears to be one of the more robust processes in the group of studies. This is in alignment with the emphasis on depth and quality of data throughout the base study's approach and ensures that the data are statistically sound, solid and reliable.

Report Users / Availability – Both the HRM and National Job Futures data are available upon request, free of charge. The CRFA study is restricted to participating association members only. All other reports are available to participants and association members, and are also available for purchase. Some organizations provide only hard copies of the final report, although most organizations are moving towards distributing the reports only electronically. No associations provide the ability to manipulate the report data online whereas the base study provides an interactive database (CD applications) to the Human Resource Organizations.

While the primary users of the association-sponsored studies are the associations and their members, and human resource professionals in the tourism sector, the HRM users are sector councils, policy makers, academics, and government research teams.

Comment/Recommendation: The base study’s distribution of final reports is consistent with the approach taken by the comparator studies. The ability that the base study presently has, to manipulate report data via the CD database, is unique. It is recommended that the CTHRC deliver future survey results via a web-based application, and provide online access to the participants so they can manipulate study results themselves, eliminating the need for binders and hard copy tables.

Future Plans

All study organizations share the same idea that “the survey must go on.” Some studies have been established for several years and are well known within their membership, e.g., the CRFA, AHLA, ASSQ, and ARQ studies. Some others such as the CMA, NGCOA Canada, and CTHRC have conducted fewer studies in comparison.

Nevertheless, the majority of the study administrators have expressed that changes for future studies are necessary, such as methodology review, electronic version of questionnaire, online survey tool, presentation format of results, cost effective means, etc.

For the CTHRC, critical outcomes of this study are:

- to build on and improve from the previous study
- to increase participation rates
- to improve access to data for participants, and
- to identify potential partnerships to work together to efficiently collect and distribute uniform tourism sector compensation data on a national, provincial and regional basis.

Final Comments / Recommendations

It is essential to realize that talents are marketable across all sectors and businesses. One of the most current pressing human resource issues faced by all employers across Canada is attraction and retention.

In order to stay competitive against other sectors, comparing with non-tourism market information is pertinent. “Levels of work/job content” should first be established by a consultant with the expertise to match tourism benchmark occupations against positions in other sectors; otherwise, it would be difficult to compare market data accurately. Obtaining non-tourism market information can be costly, depending on the level of detail and the reputation of the information provider. It is recommended that the associations combine efforts and work together to obtain non-tourism market information. In this manner, all associations involved can benefit from the process and share the information.

While monetary rewards are important in attracting and retaining talents, an expanded survey should be considered to cover human resource issues, such as work/life balance, special work arrangements, flexibility in shift hours, training and development, etc. By understanding and fulfilling the identified needs, the tourism sector would move forward in a truly competitive position in the marketplace.

III. Partnership Specific Recommendations

Partnerships

A critical outcome of this study is to identify potential partnerships with survey administrators. Given this important objective, we have dedicated a section of this report to reflecting on the similarities and differences uncovered, highlighting a few critical areas, and providing specific recommendations that would facilitate combining any partnering studies to produce a uniform nationwide compensation study for the tourism sector.

Standardized Approach

Timing – Timing of the studies varies. There could be several reasons for this:

- arbitrary – based on when the decision is made to conduct the study
- funding – based on when funding is available
- workload – based on when target participants would likely have the time to respond, e.g., low season
- usefulness – based on when data are required by the associations / participants, e.g., when organizations review their salaries

One option would be to collect data at different times by different associations and combine these “snap shots” into the survey results for the partnering associations. However, the best case scenario would be to have the interested associations combine on their survey efforts and agree on the timing of the study and thus the effective date.

Industries / Regions – Most of the studies cover one industry and one region only. This presents a limitation to the study scope. Partnering with several associations would expand and increase the sample size, allowing users to have the additional option of comparing against similar jobs across different industries. Similarly, a larger database capturing various geographical regions would allow useful comparison for users interested in a national approach.

Participation Levels – With the exception of the HRM and National Job Futures, participation levels of the studies vary from 4% to 56% of targeted participants. The extent of the follow-up campaign has proven to increase the response rate immensely. If several associations partner to produce the study, a more systematic approach to follow-up is needed to ensure a representative sample from each set of targeted participants.

Standardized Elements

Position Levels – Not all position levels (executive, management, front line) are covered in every study. All levels could easily be incorporated into a combined study.

Compensation Data – As there is not a single common compensation element among the studies, partnering associations would need to agree on which elements to collect and standardize the definitions. This standardization would allow users to compare data across industries and ensure that they were comparing “apples to apples.”

Descriptive Parameters – Descriptive parameters such as hourly or annual

compensation pay basis, full-time and part-time job data, union and non-union job data, job descriptions, and terminology would also need to be standardized. This would allow users to compare against a wider and deeper range of data

Market Analyses Details – Multiple market analyses would still be available, e.g., by geography, property size, number of employees, etc., however, combining studies would increase the amount of data available for each analysis.

Statistical Details – Standardizing the statistical details, such as percentiles, average, weighting approach, and data suppression rules using sound statistical principles applied by a knowledgeable survey supplier would provide users with a more consistent, higher quality study.

Participant Profile / Commentary – Much of this information is common to all studies but some customization may be necessary. For instance, an Accommodation industry specific measure is number of rooms while the Food and Beverage Services industry is more interested in type of foodservice category. The customization should take care of all interests. Combining studies would allow for commentary to show trends across larger markets.

Benefits / Bonus Analysis – Benefits, perquisites, and incentive programs are integral parts in a total reward package. It is therefore necessary to collect and analyze benefits and bonuses, and in the case of senior executive positions, long term incentive compensation also. A survey provider with expertise in analyzing this type of data would provide both quantitative and qualitative analyses to help understand the total remuneration and reward levels currently available in the tourism sector.

Disciplined Sampling Approach

It is obvious that associations have built up solid relationships with their members. It is also evident that establishing a representative target list and sample size is critical to the success of any study. Therefore, it is recommended that the associations work with the survey provider to identify target participation levels. The survey provider conducting the overall survey would review the "survey universe" for each industry or association and provide recommendations on the number of participants in each industry, region, size category, etc., to ensure a representative sample is reasonably targeted for the entire study.

Survey Launch / Follow-up Activities

In order to generate a successful response rate, it is recommended that the associations send out the invitations and initiate direct follow-up with their target participants. Industry associations are in the best position to encourage and persuade participants. It is a well-known phenomenon that participation follow-up is very time consuming and works best when industry leaders are actively involved.

Participant Exhaustion

From the participants' perspective, they are targeted throughout the year to complete surveys for different industry associations, organizations, and government agencies,

national and local. It is understandable that they may feel exhausted and depleted, and be reluctant to respond to every single survey.

By combining survey effort and resources, not only can the survey administrators achieve credible results and save resources, time and costs, the participants would perhaps be more willing to complete the definitive survey.

Data Collection

In order to streamline data collection, the recommended approach would be to produce one common questionnaire with an add-on module to collect data specific to each partnering industry or association. This modular approach would allow for the common questionnaire along with an industry specific module to be used for capturing specific industry data, e.g., golf courses, museums.

Data Processing

By having several industries and associations partner on one survey, they can take advantage of the services of a professional team specializing in survey design and content, data processing and analysis, data management, and report design and production. Participant submissions would be processed with standard procedures, consistent quality assurance, and direct follow-up with participants. This is another area of substantial cost savings.

Reporting

While standardization may at first seem restrictive, the resulting database would be larger and reward the users with more options for analysis. It would be more cost and time effective to produce one common report, with an add-on report specific to each partnering industry or association. For instance, a golf course participant will receive market information on the overall survey results as well as an industry specific report pertaining to golf courses.

Marketing Activities

Since most industry associations utilize similar tools and methods (websites, conventions, newsletters, etc.) to market their studies as illustrated in Section II, a combined and concerted marketing effort would produce the desired result more effectively.

IV. Job / Occupation Data Comparison

Methodology

This section presents a comparison of job data values from five occupations selected among the studies against the CTHRC base study.

Consideration in selecting the five occupations include the following criteria:

- Occupations with the most matches across the studies
- Broad representation of tourism industries
- Length of time from year of study to the base study

Two compensation elements, Base Salary and Total Cash, are used for comparison, one in each of the following two tables. As not all studies report on both compensation elements, studies are compared on the tables where applicable.

The statistical measure of average is used for comparison as all studies publish average values.

Compensation values displayed are from the year of the studies. Aging factors are not applied to bring the values to a common year for a number of reasons. First, there is a vast time span between the years of the studies, ranging from 2000 to 2007. As well, many tourism occupations are typically driven by minimum wage and have employee turnover every year. Therefore, it is inappropriate to force an estimated increase on the original values, and they have been left as originally provided.

The number of observations for each occupation's compensation values is shown wherever the sample size is available from the studies.

The studies' values are compared using hourly compensation as a common pay basis. To achieve this, some studies' values are converted from annual basis to hourly using 1,950 hours per year (37.5 hours per week and 52 weeks per year).

In the case of multiple jobs in one study matching to a single one of the five selected jobs / occupations, the average compensation value of the multiple jobs is used. If the number of observations is provided, a weighted average methodology is applied.

Caution should be exercised when interpreting the results, due to the variation of job definition among studies. The unavailability of job descriptions for some studies may affect the quality of job matching and comparison.

The five jobs / occupations selected for analysis are (base study's benchmark titles):

- Bartender
- Cook
- Front Desk Agent
- Head of Visitor Services
- Heritage Interpreter

The base study's national data are used for comparison since the labour market for typical tourism occupations is common to many organizations across the tourism sector.

Comparison Analysis The following two tables present base salary and total cash compensation values of the five occupations selected among the studies against the CTHRC base study.

Despite the time span difference among the studies, the majority of the matched data are reasonably comparable to the base study.

Base Salary Hourly Compensation

- The base study’s results for the Bartender, Cook, and Front Desk Agent occupations are basically in line with other studies, neither at the high or low end of the data spectrum. This makes sense as these occupations represent typical front line occupations crossing multiple industries, and general market data tend to be homogenous.
- When comparing the base study’s Head of Visitor Services from the Accommodation industry (\$18.71) to that of AHLA (\$19.82), the difference is reasonable. At the national level, the base study has the highest base salary, and this may have been impacted by the fact that the national data consist of three industries whereas the other studies are single industry specific.
- In the case of the Heritage Interpreter occupation, the base study shows the lowest compensation, largely due to a small number of museums represented within the base study sample.

Total Cash Hourly Compensation

- The base study’s only comparator for total cash compensation is the HRM. For the three occupations (Bartender, Cook, and Front Desk Agent) that have matched data for comparison, the HRM data are consistently higher. As gratuities / tips amounts are incorporated in specific industries of the HRM data and not in the base study’s total cash compensation, this may have caused the HRM data to be higher.

Study / Year	Base Salary Hourly \$ (Number of Observations)					
	Region	Bartender	Cook	Front Desk Agent	Head of Visitor Services	Heritage Interpreter
CTHRC / 2006	National	9.78 (n=333)	11.81 (n=505)	11.53 (n=384)	20.93 (n=82)	16.68 (n= 84)
- Accom		10.40 (n=181)	12.75 (n=221)	11.51 (n=363)	18.71 (n= 5)	** (n= 1)
- F & B		8.14 (n= 90)	10.53 (n=197)	11.10 (n= 4)	** (n= 1)	-
- R & E		10.09 (n= 57)	11.92 (n= 84)	11.80 (n= 17)	21.12 (n=75)	16.73 (n= 83)
AHLA / 2007	Alberta	9.91	13.07	12.10	19.82	-
- Accom						
ARQ / 2007	Québec	8.13	12.57	-	-	-
- F & B						
ASSQ / 2005-2006	Québec	7.84	11.86	-	18.14	-
- R & E						
CMA / 2000-2001	National	-	-	-	17.91 (n=30)	19.40 (n=129)
- R & E						
CRFA / 2007	National	-	-	-	-	-
- F & B						
GTHA / 2000	GTA	xx	xx	xx	xx	xx
- Accom						
NGCOA Canada / 2003	National	xx	xx	xx	xx	xx
- R & E						
Service Canada – National Job Futures / 2006	National	-	9.90	10.22	-	22.65
- Not sector / industry specific						
Statistics Canada - HRM / 2005	National	xx	xx	xx	xx	xx
- Accom						
- F & B						
- R & E						

Note: ** represents insufficient to publish; - represents no matched data / unavailable data; xx represents compensation element unavailable for comparison

Jobs / occupations matched from the studies include: Archivist; Barman / Barmaid; Bartender; Chef cuisinier; Conservator; Cook; Cuisinier spécialisé; Curator, Intermediate; Curator, Junior; Curator, Senior; Directeur du service à la clientèle; Front Desk Agent; Front Desk / Reservations Agent; Guest Services Manager; Head of Visitor Services; Heritage Interpreter; Hotel Front Desk Clerks; Librarians, Archivists, Conservators and Curators; Line Cook; Manager / Coordinator, Visitor Services

Study / Year	Total Cash Hourly \$ (Number of Observations)					
	Region	Bartender	Cook	Front Desk Agent	Head of Visitor Services	Heritage Interpreter
CTHRC / 2006	National	9.81 (n=333)	11.85 (n=505)	11.60 (n=384)	21.20 (n=82)	16.69 (n= 84)
- Accom		10.42 (n=181)	12.78 (n=221)	11.59 (n=363)	19.79 (n= 5)	** (n= 1)
- F & B		8.17 (n= 90)	10.56 (n=197)	11.10 (n= 4)	** (n= 1)	-
- R & E		10.13 (n= 57)	12.00 (n= 84)	11.86 (n= 17)	21.34 (n=75)	16.75 (n= 83)
AHLA / 2007	Alberta	xx	xx	xx	xx	xx
- Accom						
ARQ / 2007	Québec	xx	xx	xx	xx	xx
- F & B						
ASSQ / 2005-2006	Québec	xx	xx	xx	xx	xx
- R & E						
CMA / 2000-2001	National	xx	xx	xx	xx	xx
- R & E						
CRFA / 2007	National	-	-	-	-	-
- F & B						
GTHA / 2000	GTA	xx	xx	xx	xx	xx
- Accom						
NGCOA Canada / 2003	National	-	-	-	** (n= 2)	-
- R & E						
Service Canada – National Job Futures / 2006	National	xx	xx	xx	xx	xx
- Not sector / industry specific						
Statistics Canada - HRM / 2005 (demand side)	National	-	-	-	-	-
- Accom		13.30 (n=4,308)	12.13 (n=6,651)	12.10 (n=16,230)	-	-
- F & B		13.00 (n=6,760)	10.69 (n=20,995)	-	-	-
- R & E		-	-	-	-	-

Note: ** represents insufficient to publish; - represents no matched data / unavailable data; xx represents compensation element unavailable for comparison

Jobs / occupations matched from the studies include: Bartender; Cook; Front Desk Agent; Head of Visitor Services; Heritage Interpreter; Hotel Front Desk Clerks; Membership Director

V. Comparator Methodology At a Glance

Comparison Presentation

This section outlines the various methodology parameters and details among the participating studies. Comparison tables are presented in this section for easy review of each study's specific components.

Acronyms and full names of the sponsor associations for the studies analyzed are listed in Section II.

Study Scope

Sponsor	Year of Study	Industry	Jobs / Occupations / Position Levels	Geography / Regions	No. of Targeted Participants	No. of Actual Participants / Incumbents
CTHRC	2006	Accom, F & B, R & E	27 (executive, management, front line)	National, 11 provinces / territory, and sub regions within provinces	Approximately 2,700*	1,153 / 51,754
AHLA	2007	Accom	52 (executive, management, front line)	4 regions within Alberta	About 300 orgs	154 / not available
ARQ	2007	F & B	13 (management, front line)	Québec	3,855 orgs	145 / not available
ASSQ	2005-2006	R & E	60 (executive, management, front line)	Québec	71 orgs	40 / not available
CMA	2000-2001	R & E	40 (executive, management, front line)	National, and 5 regions	640 orgs	171 / not available
CRFA	2007	F & B	61 (executive, management, front line)	National, and geographic locations	Restricted information	26 / not available
GTHA	2000	Accom	Jobs / occupations not applicable (aggregate of all position levels)	Greater Toronto Area	About 100 orgs	33 / 10,000 +
NGCOA Canada	2003	R & E	18 (executive, management)	National, and 8 regions	942 orgs	390 / 17,000 +
Service Canada – National Job Futures	2006	Not industry specific, all sectors combined	265 (management, front line)	National	About 54,000 households / month (LFS)	About 48,600 households / month (LFS)
Statistics Canada – HRM	2005	Accom, F & B, R & E, Transportation, Travel Services	41 (management, front line)	National	Estimated 470,000 jobs (demand side)	Estimated 470,000 jobs (demand side)

Note: * It is difficult to determine the true number of targeted participants, since participants were not all directly targeted, i.e., some were indirectly targeted by magazine ads, etc. The recommended number of targeted participants was approximately 3 times the desired number of participants (900) which means that approximately 2,700 participants should have been targeted.

Compensation Data

Sponsor	Compensation Elements Published	Gratuities Treatment / Inclusion	Compensation Values Collected for Multiple Incumbents
CTHRC	Range Minimum, Range Maximum, Base Salary, Total Cash	Qualitative analysis for selected jobs, values not part of job data	Individual salary data wherever possible; otherwise average values
AHLA	Minimum Salary, Maximum Salary, Salary / Wage	None	Average values
ARQ	Minimum Salary, Maximum Salary, Tips	Values published for specific jobs	Minimum, maximum and average values
ASSQ	Entry Salary, Maximum Salary	None	Minimum, maximum and average values
CMA	Base Salary Minimum, Base Salary Maximum, Base Salary Actual	None	Average values
CRFA	Restricted information	Restricted information	Restricted information
GTHA	Gross Pay, Total Compensation	Values published, part of total benefits compensation	Average values
NGCOA Canada	Bonus, Total Cash Compensation	None	Minimum, maximum and average values
Service Canada – National Job Futures	Base Salary / Wage	None	Individual salary data
Statistics Canada – HRM	Salary / Wage (includes gross pay, commissions, tips, bonus, other allowances, pensions, unemployment insurance and other social insurance schemes)	Included in job data (allocated tips to selected industries)	Individual salary data

Descriptive Parameters

Sponsor	Hourly / Weekly / Annual \$	Full-time / Part-time / Seasonal Job Data	Union / Non-union Job Data	Benchmark Job Descriptions	Glossary / Definitions in Data Submission Tool / Report
CTHRC	Hourly, Annual	Full-time, part-time, seasonal	Separate analysis for both groups	Yes	Yes
AHLA	Hourly, Annual	No distinction	No distinction	No	No
ARQ	Hourly	No distinction	No distinction	No	No
ASSQ	Hourly, Weekly	No distinction	Separate analysis for both groups	Yes	Yes
CMA	Annual	Full-time equivalent	No distinction	Yes	Yes
CRFA	Restricted information	Restricted information	Restricted information	Yes	Restricted information
GTHA	Annual	Full-time equivalent	No distinction	Not applicable	Yes
NGCOA Canada	Annual	Full-time equivalent	No distinction	No	Yes
Service Canada – National Job Futures	Hourly, Annual	Full-time equivalent	No distinction	Yes	Yes
Statistics Canada – HRM	Hourly, Annual	Full-time, part-time	No distinction	Yes	Yes

Market Analyses Details

Sponsor	Market Analyses per Job / Occupation	Minimum Publication Requirement (Number of Observations)	Number of Observations Published
CTHRC	310 cuts (by industry, province/territory, regions within province/territory, employment status, union status, organization profile, even job match level, and pay basis)	4	Yes
AHLA	13 cuts (by region, and property size within region)	No specific rule	No
ARQ	5 cuts (by restaurant category)	No specific rule	No
ASSQ	8 cuts (by size and union status)	3	No
CMA	33 cuts (by organization profile parameters, and region)	3	Yes
CRFA	Number of cuts varies from year to year (by geographic location, and foodservice category)	Restricted information	Yes
GTHA	13 cuts (by size, locations within the GTA, and pay basis)	1	No
NGCOA Canada	24 cuts (by organization profile parameters, and region)	5	Yes
Service Canada – National Job Futures	1 cut	1,500	No
Statistics Canada – HRM	160 cuts (by industry, gender, employment status, age, and immigrant status)	20	Yes

Statistics Details

Sponsor	Statistics Published	Weighting Approach (By Organization or By Individual Incumbent)	Roll-up Approach (Participants Reporting Multiple Operations with Same Pay Policy Counted as One Respondent)
CTHRC	Average, percentiles (10 th , 25 th , 50 th , 75 th , 90 th)	By organization	Yes
AHLA	Average	By organization	Not known
ARQ	Average	By organization	No
ASSQ	Average, minimum, maximum	By organization	No
CMA	Average, percentiles (25 th , 50 th , 75 th)	By organization	Not known
CRFA	Restricted information	Restricted information	Restricted information
GTHA	Average	By organization	No
NGCOA Canada	Average, percentiles (25 th , 50 th , 75 th)	By organization	Not known
Service Canada – National Job Futures	Average	By incumbent	Not applicable
Statistics Canada – HRM	Average, aggregate	By job	Not applicable

Supplementary Analyses

Sponsor	Participant Profile	Executive Summary / Commentary	Pay Administration Policy	Human Resource Issues
CTHRC	Yes	Yes	Yes	Qualitative
AHLA	No	No	No	None
ARQ	Yes	No	No	None
ASSQ	No	No	Yes	None
CMA	Yes	Yes	Yes	Qualitative
CRFA	No	Restricted information	Restricted information	Restricted information
GTHA	Yes	Yes	No	Qualitative
NGCOA Canada	Yes	Yes	No	Qualitative
Service Canada – National Job Futures	Not applicable	Yes	No	None
Statistics Canada – HRM	Not applicable	Yes	No	None

Bonus / Benefits Analyses

Sponsor	Bonus / Incentives	Benefits / Perquisites	Benefits Values
CTHRC	Qualitative	Prevalence	None
AHLA	Prevalence	Prevalence	None
ARQ	None	None	None
ASSQ	Prevalence	Prevalence	Employee discount values
CMA	Qualitative	Prevalence	Maximum values of benefits
CRFA	Restricted information	Restricted information	Restricted information
GTHA	Qualitative	Prevalence	Extensive
NGCOA Canada	Qualitative	Prevalence	None
Service Canada – National Job Futures	None	None	None
Statistics Canada – HRM	None	None	None

Study Launch Details

Sponsor	Target Participants	Frequency of Study	Timing of Study	Preparatory Launch Activities / Report Marketing
CTHRC	Accom., F & B, R & E organizations across Canada	No established frequency	September to March	Pre-launch e-mails, advertisements in industry magazines, CTHRC and partnering Human Resource Organization websites, press release, conventions*
AHLA	AHLA members	Annually	July to October	Pre-launch e-mails, AHLA website, newsletter, April convention
ARQ	ARQ restaurant owner members	Annually	Varies (August in 2007)	Briefing by fax, ARQ magazine, ARQ website
ASSQ	ASSQ members	Every 3 years, update on wage increases in the years between	January to May	Newsletter, reminders at association meetings and workshops, ASSQ website
CMA	CMA members	No established frequency	Late fall	CMA website, newsletters to members, press release, trade magazine, conventions, conferences, seminars
CRFA	CRFA chain members	Annually (short survey on cash compensation one year, long survey including cash, non-cash, and ancillary analysis the next)	Spring to June	CRFA website, only marketing to association members
GTHA	GTHA members	No established frequency	May to January	GTHA website, press release, trade magazines, presentation at the CTHRC, conventions, conferences
NGCOA Canada	NGCOA Canada members	No established frequency	Late winter to June	Pre-launch e-mails, NGCOA Canada website, member newsletters, notices at chapter and national meetings, trade magazines
Service Canada – National Job Futures	Not applicable	Every 2 years	Late winter to May	Job Futures website, publications sent to schools, colleges, universities, and career counsellors across Canada, conventions, conferences
Statistics Canada – HRM	Not applicable	Annually	Fall to spring	Statistics Canada website (Daily Press Release), advance notice to media

Note: *Activities vary depending on the particular partnering Human Resource Organization

Collection Tool / Follow-up / Users

Sponsor	Data Collection Tool / Tool Distribution	Participation Follow-up / Data Chase	Data Verification with Participants	Report Users / Availability
CTHRC	Survey information distributed by e-mail, fax and mail, accessible from websites	Follow-up campaign by telephone and e-mail	Audit checks / confirmation with each participant	Participants; CTHRC affiliates; partnering Human Resource Organizations; industry associations; available for purchase
AHLA	2 questionnaires (fixed roof, campground) distributed by e-mail, fax and / or mail	Telephone follow-up	No	Members; Service Canada; also available for purchase
ARQ	Questionnaire distributed by fax, and downloadable from website	No	Participants not contacted, but data checked and problematic data omitted	Members; also available for purchase
ASSQ	Questionnaire distributed by mail, and downloadable from website	Telephone follow-up	Clarification of data with participants if necessary	Members; also available for purchase
CMA	Questionnaire distributed by e-mail, fax and / or mail	Not known	Not known	Members; also available for purchase
CRFA	Questionnaire distributed by e-mail, fax and / or mail	Yes	Yes	Participating members only
GTHA	Questionnaire distributed by e-mail, fax and / or mail	Telephone follow-up, reminders sent	Clarification of data with participants if necessary	Members; also available for purchase
NGCOA Canada	Hard copy questionnaire included in magazine mailing, downloadable from website	Follow-up campaign by e-mail, telephone and personal contact	No	Members; also available for purchase
Service Canada – National Job Futures	Labour Force Survey; Census of Population; National Graduate Survey; Canadian Occupational Projection System; industry associations; unions	Internal data chase with data source groups, e.g., NGS	Extensive audit checks / validations with data source teams	Students making educational and career decisions; workers upgrading skills; individuals re-entering the job market; career counsellors; teachers; parents; new immigrants; available to the general public
Statistics Canada – HRM	System of National Accounts; Census of Population; Labour Force Survey; Survey of Employment, Payrolls and Hours	Internal data chase with data source groups, e.g., SNA, Census	Extensive audit checks / validations with data source teams	Government; Statistics Canada; CTC; CTHRC; sector councils; policy makers; academics; industry associations; available to general public upon request

Future Plans

Sponsor	Future Plans
CTHRC	To build on and improve the previous study, to increase participation rates, to improve access to data for participants and to identify potential partnerships to work together to efficiently collect and distribute uniform tourism sector compensation data on a national, provincial and regional basis.
AHLA	May conduct online wage survey in 2008; may consider online feedback survey
ARQ	Continue to conduct survey annually; keep questionnaire to one page and review restaurant categories; may change presentation format of results
ASSQ	Plan to use an electronic questionnaire in 2008; no plan to combine Ontario and Atlantic surveys with the ASQ study (different schedules, different associations, different unions)
CMA	Want to conduct another survey but by more cost effective means; interested in partnering with the CTHRC in future studies
CRFA	No plans to partner with other associations for future surveys; the current approach works very well. The 2007 report is the 10 th year of the survey and participants are very satisfied with it.
GTHA	Due to the positive feedback and great reviews received from the accommodation industry throughout the years, there may be interest in benchmarking the study every five years; and the GTHA may be interested in doing the next survey partnering with the HHRPA.
NGCOA Canada	A repeat survey in 2006 did not succeed due to poor response rate. Intend to conduct a simpler survey in 2008 using the 2003 survey as a template. Interested in reviewing methodology for the new survey.
Service Canada – National Job Futures	Consider changes of content and website; redesign depending on what new information to include; achieve better partnership with provinces and associations; change timing of study to “April to Fall” to coincide with the Looking-Ahead: A 10-Year Outlook for the Canadian Labour Market study
Statistics Canada – HRM	Try to compile statistics quarterly in the future; improve timeliness

VI. Overview of Studies

This section presents a summary for each participating study by providing a brief description and summarizing the study content with respect to the following attributes: sponsorship, year of study, purpose of study, industries covered, participants, jobs and occupations, and compensation elements.

Canadian Tourism Human Resource Council – 2006 Canadian Tourism Sector Compensation Study: National

Sponsor / Survey Provider	Canadian Tourism Human Resource Council (CTHRC); survey conducted by Hay Group
Year of Study	Published in March 2007; survey conducted in September 2006
Purpose of Study	To establish a national benchmark for compensation studies for the tourism sector; to assist tourism employers by providing comprehensive compensation data on a national, provincial and regional basis, to help address the human resource issues facing the tourism sector; to help inform stakeholders of compensation levels in tourism.
Industry / Participants	Accommodation, Food & Beverage Services, Recreation & Entertainment; 1,153 organizations from across Canada participated covering over 51,000 incumbents
Jobs / Occupations	27 benchmark jobs (executive, management, front line); job descriptions available
Compensation Elements	Base salary, total cash, salary range minimum, and salary range maximum; results presented in both annual and hourly dollars
Description	<p>This study covers three tourism industries with 27 benchmark jobs representing all three industries, collecting compensation and benefits data from organizations across Canada.</p> <p>Qualitative information on participant profile, pay administration practices, gratuities, bonus and incentives, benefits and perquisites are presented. Human resource issues and challenges reported by the participants are also presented.</p> <p>Market analyses are segmented by primary industry (accommodation, food and beverage services, and recreation and entertainment), geographic location (by province/territory, and sub-regions within each province/territory), employment status (full-time, part-time, seasonal), reported pay basis (salaried, hourly), and job classification (union, non-union). Number of rooms for the accommodation industry, and restaurant category for food and beverage services are segmented for analysis. In addition to the national report, separate reports are published for each province/territory.</p> <p>The study was sponsored by the CTHRC and partnering Human Resource Organizations and is the result of a concentrated effort by the sponsors from coast to coast.</p>

Alberta Hotel & Lodging Association – 2007 Wage Survey

Sponsor / Survey Provider	Alberta Hotel and Lodging Association (AHLA); survey conducted by Roberts & Company Chartered Accountants
Year of Study	Published in October 2007; survey conducted in July
Purpose of Study	To provide up-to-date wage information to hotels and lodging facilities in Alberta; to act as a guide for Service Canada
Industry / Participants	Accommodation; 154 organizations including fixed roof and campground lodging establishments in Alberta participated
Jobs / Occupations	52 benchmark jobs (executive, management, front line)
Compensation Elements	Minimum salary, maximum salary, salary/wage; results presented in both annual and hourly dollars
Description	<p>This survey focuses on the 52 surveyed jobs collecting compensation data from both fixed roof and campground lodging facilities in Alberta. Prevalence of bonus plans and employee benefits for all position levels are analyzed.</p> <p>Market analyses are segmented by location (Calgary, Edmonton, Mountain Parks, and Other Alberta), and by size (number of rooms).</p> <p>Two questionnaires are used in order to cater to the two different types of lodging facilities.</p>

Association des restaurateurs du Québec – Sondage sur les salaires 2007

Sponsor / Survey Provider	Association des restaurateurs du Québec (ARQ); survey conducted by ARQ
Year of Study	Published in August 2007; survey conducted in August
Purpose of Study	To provide up-to-date salary information to restaurants in Québec
Industry / Participants	Food & Beverage Services; 145 restaurants from Québec participated
Jobs / Occupations	13 benchmark jobs (management, front line)
Compensation Elements	Minimum salary, maximum salary, tips; results presented in hourly dollars
Description	<p>This survey focuses on 13 benchmark jobs collecting compensation data from 145 restaurant owners in Québec.</p> <p>Market analyses are presented by restaurant categories (quick service, family, intermediate, and superior). Gratuities earnings are reported for specific jobs.</p> <p>This annual survey is conducted and managed by the ARQ. Using a one-page questionnaire, the turnaround time of the study is one month from survey launching to publishing results. Due to the huge target list, the ARQ employs an outside organization to send questionnaires by fax.</p>

Association des stations de ski du Québec – Enquête salariale Saison 2005-2006

Sponsor / Survey Provider	Association des stations de ski du Québec (ASSQ) ; survey conducted by Sylvain Audet, MBA
Year of Study	Published in May 2006; survey conducted in January
Purpose of Study	To provide up-to-date salary and benefits information to ski resorts in Québec
Industry / Participants	Recreation & Entertainment; 40 ski resorts from Québec participated
Jobs / Occupations	60 benchmark jobs (executive, management, front line); job descriptions available
Compensation Elements	Entry salary, maximum salary; results presented in both weekly and hourly dollars
Description	<p>This survey focuses on compensation data for ski resorts in Québec. Prevalence information on bonus and incentives, and employee benefits are provided. Perquisites such as employee discount values are analyzed.</p> <p>Market analyses are presented by size of the participating ski resorts. Separate analysis is given for union and non-union employee groups.</p> <p>Similar studies for ski resorts in Ontario and Atlantic Canada are also administered by the same consultant. These two surveys basically share the same survey methodology of the ASSQ, but are conducted at different time schedules, using slightly different questionnaires to target the different participants.</p>

Canadian Museums Association – National Compensation Survey 2000/2001

Sponsor / Survey Provider	Canadian Museums Association (CMA); survey conducted by Deloitte and Touche
Year of Study	Published in 2001; survey conducted in late fall of 2000
Purpose of Study	To provide members of the Canadian Museums Association with current and relevant compensation data
Industry / Participants	Recreation & Entertainment; 171 museums from across Canada participated
Jobs / Occupations	40 benchmark jobs (executive, management, front line); job descriptions available
Compensation Elements	Base salary minimum, base salary maximum, base salary actual; results presented in annual dollars
Description	<p>This survey focuses on compensation data for museums. Many of the benchmark positions are unique to museums (curators, archivists, conservators, exhibition technicians).</p> <p>The qualitative section includes a summary of current trends and practices in compensation design and administration (short term incentives, base salary progression), and human resource details (general management, recruitment and retention, volunteer resources). Prevalence and cost sharing arrangements are provided for employee benefits and perquisites.</p> <p>Market analyses are presented nationally and broken down by region (Ontario, Québec, Prairies, West/Northwest, Atlantic) and organization parameters including annual budget, number of employees, type of institution (art gallery, natural history, etc.), and governing authority (board of directors, federal government, etc.).</p>

Canadian Restaurant and Foodservices Association – 2007 Confidential Chain Compensation Survey

Sponsor / Survey Provider	Canadian Restaurant and Foodservices Association (CRFA); survey conducted by Canadian Compensation Resources
Year of Study	Published in June 2007; survey conducted in the spring
Purpose of Study	To provide CRFA members trusted source of compensation information
Industry / Participants	Food & Beverage Services; 26 foodservice chains participated
Jobs / Occupations	61 benchmark jobs (executive, management, front line); job descriptions available
Compensation Elements	Unavailable – restricted information
Description	<p>The annual survey focuses on cash compensation data one year, and conducts a longer survey the next year to capture both cash and non-cash compensation, as well as supplementary analysis.</p> <p>Results are available by geographic locations and major centres across Canada, and by two segments of foodservice operations: quick service, and combined family/casual/fine dining. Results depend on data availability and the needs identified by survey participants.</p> <p>The survey is in its 10th publication. The CRFA feels that the current approach is working well, and participants are very satisfied with it. The report is available to participating association members only.</p>

Greater Toronto Hotel Association – Benefit Compensation Survey 2000

Sponsor / Survey Provider	Greater Toronto Hotel Association (GTHA); survey conducted by Group Lockhart Inc.
Year of Study	Published in January 2002; survey conducted in May 2001
Purpose of Study	To determine the GTA hotel industry’s competitive position with respect to total benefits compensation and to establish industry benchmarks for the hospitality industry
Industry / Participants	Accommodation; 33 hotels in the Toronto area participated covering over 10,000 employees (2,094 salaried and 7,963 hourly)
Jobs / Occupations	Not applicable; not based on individual jobs
Compensation Elements	Gross pay, total compensation (base salary plus bonus plus benefit value); results presented in annual dollars
Description	<p>This survey focuses on employee benefits compensation and practices rather than on salary compensation for specific jobs. Values assigned to benefits are based on KPMG Employee Benefit Costs for 1998. The study is also compared to the Toronto Board of Trade Benefit and Employment Practices Survey, 2000.</p> <p>Market analyses are presented by GTA location (downtown, airport, other), by size (number of rooms) and reported pay basis (salaried, hourly). A qualitative section on best practices is also provided.</p> <p>Despite the fact that this survey was conducted in 2001, it continues to serve as a benchmark in the hospitality industry for benefits values and practices.</p>

National Golf Course Owners Association Canada – 2003 Compensation and Benefits Report

Sponsor / Survey Provider	National Golf Course Owners Association (NGCOA) Canada; survey conducted by Georgian College
Year of Study	Published in June 2003; survey conducted in February
Purpose of Study	To provide Canadian golf course owners/operators access to Canadian compensation data
Industry / Participants	Recreation & Entertainment; 390 golf courses from across Canada participated covering over 17,000 incumbents
Jobs / Occupations	18 benchmark jobs (executive, management)
Compensation Elements	Bonus, total cash compensation; results presented in annual dollars
Description	<p>This survey focuses on total cash compensation data for the golf industry. Qualitative analysis on bonus and incentives, and prevalence information on employee benefits as well as additional perquisites specific to the golf industry are covered by the survey.</p> <p>Market analyses are presented by region (Alberta, Prairie, etc.) and organization profile characteristics (revenue size, tax status, number of golf holes, etc.).</p> <p>An extensive and concentrated follow-up campaign was put in place for the 2003 study. A second survey was attempted in 2006 but not completed due to poor response rate. Another attempt is planned for 2008.</p>

Service Canada – National Job Futures 2006

Sponsor / Survey Provider	Service Canada; study compiled by Service Canada
Year of Study	Published in May 2006; study compiled in winter 2005
Purpose of Study	To provide youths, students and job seekers with up-to-date labour market information on compensation as well as future prospects for each occupation
Industry / Participants	Not applicable (all sectors combined; participation not organization based)
Jobs / Occupations	Part I: 265 occupational groups covering the entire Canadian labour market (management, front line); job descriptions available Part II: 155 major programs of study representing about 90% of all post-secondary school graduates
Compensation Elements	Base salary/wage; results for occupational groups presented in hourly dollars; results for fields of study presented in annual dollars
Description	<p>This study is composed of two components. Part I provides compensation data and a five year outlook for 265 occupational groups, and Part II provides similar information for 155 fields of study.</p> <p>This study focuses on wages / salaries. Unemployment rates are also reported. Bonus and incentive programs, employee benefits and perquisites are not covered by this study.</p> <p>Market information represents the aggregate of all sectors.</p> <p>Data are based on multiple sources: Labour Force Survey, National Graduate Survey, etc. Business associations and unions provide commentary for validation purposes. In addition to National Job Futures, provincial Job Futures are also in place.</p>

Statistics Canada – Human Resource Module of the Tourism Satellite Account 2005

Sponsor / Survey Provider	Statistics Canada; study compiled by Statistics Canada
Year of Study	Published in 2007; covers 1997 to 2005 data; fall to spring
Purpose of Study	To provide timely and reliable statistics on the human resource dimension of tourism
Industry / Participants	Accommodation, Food & Beverage Services, Recreation & Entertainment, Transportation, Travel Services; participation not organization based
Jobs / Occupations	41 occupations excluding overlap among industries (management, front line); job descriptions available
Compensation Elements	Total cash compensation; results presented in annual and hourly wage rates
Description	<p>The HRM presents detailed information on wages and salaries (total compensation), number of jobs and hours worked for employment in the tourism sector. Data used in the analysis are from the System of National Accounts, Census of Population, Labour Force Survey, and Survey of Employment, Payroll and Hours.</p> <p>Market analyses are segmented by age, gender, employment status, and immigration status. Separate analyses for both the total tourism sector (the supply side), and data directly attributable to tourism (the demand side) are available.</p> <p>In addition to the various sources of data, Statistics Canada also involves time series, data smoothing techniques, and manual adjustments in its methodology.</p>

Appendix A About Hay Group

About Hay Group

Hay Group is a global consulting firm that works with leaders to transform strategy into reality. We develop talent, organize people to be more effective and motivate them to perform at their best. With 88 offices in 47 countries, we work with over 7,000 clients across the world. Our clients are from private, public and not-for-profit sectors, across every major industry and represent diverse business challenges. For over 60 years, we have been renowned for the quality of our research and the intellectual rigor of our work. We transform research into actionable insights. We give our clients breakthrough perspectives on their organization and we do it in the most efficient way to achieve the desired results. Our focus is on making change happen and helping people and organizations realize their potential.

Hay Group Limited
www.haygroup.com/ca

Canadian Head Office

121 King Street West
Suite 700
Toronto, ON
M5H 3X7
t +1.416.868.1371

Vancouver

1140 West Pender Street
Suite 1390
Vancouver, BC
V6E 4G1
t +1.604.682.4269