



2017 HOTEL AND GAMING COMPENSATION REPORT



INTRODUCTION SOURCE OF INFORMATION

2017 Compensation Surveys was revised in April 2017. The outcomes were accumulated from a comprehensive information analysis extracted from Renard International's own database of 45,000 candidates and supplemental 15,000 contacts. The sources also included written answers to our global survey sent to Executives in over 50 countries.

The data was also taken from thousands of resumes received monthly by Renard offices and Consultants worldwide, which confirms in writing individuals current remuneration, benefits, bonuses, etc.

They also signpost desired salary, benefits, preferred location and ideal role.

Some of the salary ranges in this guide are based on actual transactions between employers and employees of Renard International and represent a true reflection of the job marketplace.

In 2015 alone, Renard Consultants successfully completed assignments in over 40 countries from Culinary to the CEO of a major Hotel/Casino Group. We have now assisted Clients in nations that were non-existent when we commenced business 47 years ago.

Our Remuneration Reviews are produced using an **average format** in which the information is totaled and divided by the number of replies, or, in a **median format**, which is calculated using data mid-range to extremes.

We hope this guide will serve as a useful tool for your talent compensation planning.





Stephen J. Renard

STEPHEN J. RENARD

President



The Strength of Experience.



Some of the executive staff for this world class hotel was provided by Renard International Hospitality Search Consultants

INTRODUCTION - APRIL 2017

Join Renard International as we celebrate our 47th anniversary in 2017.

We are proud of our company's success over these past five decades. Having received the highest ratings from international and independent hotel companies, restaurants, casinos and food service organizations, we have become one of the most respected hospitality search companies in the world.

Our employees have fueled our achievements, with their dedication and commitment to both our clients and our applicants. These employees constantly strive to refine and improve the services we provide.

Renard International has been deemed the "benchmark" of recruitment companies. We are pleased and honored by this recognition.

We thank you for your loyalty and confidence over these last 46 years. We very much appreciate it.

CONFIDENCE & CONFIDENTIALITY, RESOURCES & EXPERTISE

- Confidentiality remains fundamental and we have a proven ability to protect both clients and applicants alike. This security is necessary for applicants during the sensitive transition period, when unwanted exposure may endanger their current position. No fee is required from applicants, a factor which attracts outstanding individuals from around the world.
- By utilizing our resources and expertise, clients save significant time and money throughout the selection process.

OUR PEOPLE

Specialists who know your industry.

Renard International is comprised of talented hospitality professionals who make it their business to stay well-informed of current trends and practices. We invest considerable time and resources into visiting client properties and applicant workplaces.

The accuracy of our selection process is backed up by our strong success rate. Almost all of our successful placements have remained throughout their contract period, many of them advancing to the upper echelons of renowned corporations in the industry.

AROUND THE HIRING WORLD - APRIL 2017



CHINA

As some of China's Industries are in contraction combined with government policy on Luxury Hotel spending; occupancies especially luxury brands are weak. Saying that, the hotel industry is still active in secondary cities. Primary cities such as Shanghai and Beijing suffer from over building and pollution related issues.

Mandarin speakers have many opportunities in primary and secondary cities. Chinese citizens with hotel experience outside of China are the "toast of the town". If you are willing to go to secondary cities you'll have no problem finding career options with top luxury brands.



MIDDLE EAST, UAE AND AFRICA

The UAE allows unrestricted recruitment so candidates move across the street (Breeding similar operating styles and F&B concepts). There will come a time when this tactic will not work and you will be unable to "steal enough to feed Peter from Paul". In 2017 we do not expect huge recruitment blitzes as staff levels are reducing due to over-building and lower average rates and occupancies. In the UAE jobs are available in all categories although some compensation packages have dwindled in that last 24 months.

The Middle East and Africa have more hotels under construction than anywhere else in the world. By late 2016 the reported hotels and rooms under construction totaled approximately 200,000 rooms and 850 hotels. There are 150,000 rooms and over 550 hotels under contract to open mostly in the UAE, Qatar and Saudi and 56,000 rooms and 300 hotels under contract in Africa.

Saudi Arabia reported the most rooms in construction almost 36,000 rooms and over 80 hotels. With so much construction going on the next questions is, how do you fill all the staff for these new hotels? Especially in Saudi Arabia where "Saudization" restricts visas.



UNITED KINGDOM

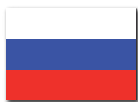
The future is uncertain, as no one knows the impact of Brexit and so investment monies are sitting on the sidelines. Staff is moving outside of the major hubs due to rent increases.

European culinarians and sales and marketing people are no where to be found, and with Brexit, may be never to be seen again. Salaries in the UK are generally higher than their counterparts in Europe; but taxes and cost of living equal things out.



EUROPE

Even with strain of immigrants and terrorist threats many parts of Europe are doing well like Hungary and the Czech Republic. Others for political reasons are definitely not. Many hoteliers from around the world of European descent want to go home for family reasons; but perhaps the time is not right yet now. Many jobs are available in Germany and Western Europe. Spain and Portugal are doing well and watch out for Hotels and Casinos on Cape Verde Islands.



RUSSIA

First Syria, second Ukraine = Rubble Sinking.

Nothing hurts worse than a political battle. Russia is therefore; not in the hiring mood. Business remains ok in the major cities, however only a few expats are hired and many are leaving. They are either unaffordable or will not accept a USA salary decreases as the weakening ruble makes expats awfully expensive. Fewer international visitors also decrease the need for expats.



SE ASIA

Moving along solid Local regional business; but not breaking any occupancy records; but OK. Mandarin speakers with international exp. or Michelin Star history are highly sought after. Many mid-management roles are now filled locally but GM, F&B and DOSM for luxury or lifestyle brands are hot! Many clients say they want 1. "No job hoppers" 2. No Children as the cost of education is through the roof and 3. And no to those who want Asia just for a "change or lifestyle. As it is hard to work there for sure.



MACAU

More casinos opened in 2016. Macau surpassed the gambling revenues of Las Vegas again. Business showed an upturn in late 2016. There is a constant need for Michelin Star Culinarians, Mandarin speaking management and like the rest of the world, USA Casino trained executives.



CANADA

Development in the hotel industry is confined to mainly condominium funded hotels, mid-range limited service and boutique-style individually owned hotels and resorts. Extensive Casino expansion has offered USA trained Casino executives the opportunity to experience the Canadian lifestyle. There is a major shortage, in all categories of mid-range senior-level Canadians with luxury hotel expertise.



USA

Donald Trump, Donald Trump, need I say more? The USA Hotel Industry is doing fine. Growth and occupancy have been up all over the board, especially in secondary cities as well as cities like Houston, Detroit and Philadelphia, which until recently had shown no rebirth of occupancy or R.O.I. There is still, no luxury talent around, especially culinary (pastry chefs are rare) and sales executives.



MEXICO, LATIN AMERICA AND DOMINICAN REPUBLIC

The all-inclusive concept is still no.1 as guests are happy to pay the one price for everything. Companies like Paradisus, Karisma, Dreams and Sandals etc. are raising the expectations in 5 star luxury resorts making this one price concept to be feared globally if it could be successfully recreated around the world.

PS: The Dominican Republic has become the 2nd largest tourism earner in Latin America behind Mexico.



SCANDINAVIA/NORTHERN EUROPE

Local business is the savior. The accommodation business is rolling along with excellent occupancies with little foreign hiring as high taxes are not appealing to expatriates Non-financially driven executives and those who are sales-driven or speak the local language do best. Returning residents are always welcome as there are may jobs available.



MALDIVES/SEYCHELLES

Small salaries for small hotels. Staffing is challenging to find, there is the "cruise line affect" where staff complete their contract never to return. Talented people have choices and small islands are not long-term; especially for families or people desiring lifestyle. These locations are best for young aspiring executives who want their first-big title. These smaller resorts cannot compete with major cities or larger resorts compensation wise either, Vacancies in all categories are available to interested parties.



FRANCE

France has seen a teeter-totter since the recent terrorist actions. Occupancies have gone up and down which did not help tourism for the entire country. Hiring has slowed down considerably as well. Another reason is the high cost of staff (due to hefty payroll and income taxes) makes hiring very expensive. There are few executive roles available with multi-national hotel companies; but most clients prefer to hire French nationals living and working next door.



INDIA

Business is up and so is hiring. The entire country's occupancy have rebounded in 2016 as a result of a quiet political scene; new hotels and improving financial results are promoting fresh hires. The increase in rooms available has led to greater competition for talent. Senior management opportunities are consistently available for European expatriates if affordable. More internationally trained Indian nationals have been persuaded to return home by attractive semi expat-style packages.



CARIBBEAN

Cuba Cuba The onslaught is on - everyone wants to plant their flag and now with Bahamar brings new lifestyle to the Bahamas as well. The development light is shining bright for Cuba, an island only 12 miles from Miami. The new luxury resort Bahamar will change the hiring landscape and raise Caribbean salaries. Hiring and competition is bustling for Carecom citizens. Rooms people, financial controller, DOSM, Chef and F&B categories are hot! International schooling is still a challenge for children over 12 years old.



FAR EAST SALARY SCALE 2017

Revised in February 2017

These salary scales are for Singapore, Korea, Hong Kong, Taiwan, Macau (hotels and casinos) and People's Republic of China.
This Guide is for Deluxe Hotels with a Minimum Average Room Rate of **US\$210**
Salaries Net of Income Tax (excluding Hong Kong and Macau)^{XI}
300 Rooms - 600 Rooms 4-5 Star International Rated Hotels

Sector I Positions	*Lowest Reported Jan 2016 - Jan 2017	Highest Reported Jan 2016 - Jan 2017	Average of February 2017	Average % Change Jan 2012 - Jan 2017
General Manager	116	500 ^E	125	+45%
Resident Manager +	60	124	68	+23.1%
Rooms Division Manager	54	95	60	+25.5%
Front Office Manager	43	88	50	23.8%
Executive Housekeeper	58	135 ^K	66	+33%
Chief Engineer	65	125	74.5	+25.5%
Laundry Manager	35	60	45	+14%
Food & Beverage Director ++	68	145 ^L	75.3	+32.6%
Restaurant Manager (Fine Dining Room)	41	60	50	+15.1%
Catering Manager (Sales)	38	53.5	47	+9.9%
Banquet Manager (Operations) ^	39.5	64.2	46.3	+17.9%
Executive Chef	69.3	161	87.2	+23.6%
Gourmet Restaurant Chef	57	A 130 ^L	72	+24.8%
Executive Sous Chef	48	75 ^L	55	+13%
Italian Chef	63.4	120 ^L	70	+25.2%
Pastry Chef	59.2	120 ^L	64	+24.9%
Comptroller	62	130	72	+24.6%
Personnel & Training Manager	61.1	86	68.6	+21%
Sales & Marketing Director	83.3	195 ^L	95.2	+33.6%
Sales Manager (No. 2)	45	77	59.9	+17.1%
Revenue Manager	42.3	65.5	49.1	+9.6%
IT Manager	38	85 ^L	60.4	+10.9%
Social Media Director ^H	31.4	73 ^L	39.9	+32.3% ^{XX}

• Some base salaries are inclusive of benefits including housing and transportation allowance.

^A Gratuities, which are important part of the income in banquets, are not included; some have increased substantially in the last 6 years

* Can be referred to as hotel manager or director of operations

** Sometimes the term is Executive Assistant Manager / F&B, and the position is No. 2 in the hotel due to the size of the property; in which case the food and beverage director's salary as described may be high.

^E Managing single unit with title GM, with responsibilities over other hotels. No increase in 2016 as 2 year contract finalized.

^y Macau non casino hotel

^k Post now includes some non-Housekeeper responsibilities
No benefits or bonuses are included in this figure. It is net or base gross (we deduct income applicable taxes to equal to those earning net salaries)

^L Casino environment

^{XI} Sometimes accommodation allowance & other benefits are included in the salary

Note: Some increase due solely to currency exchange

Overview: In 2016-2017 we saw little or no substantial increase over previous year. In fact, some salaries and averages declined; this was the first time in a decade.

Median is defined as a number that represents a midpoint between extremes on a scale of valuation. In some cases where one salary was either ridiculously high or too low and way out of line, we removed it as it would have distorted the true median salary range.

Average is achieved by totaling all salary information and dividing by the number of respondents.

^H New role, no historical data

Comments (Study conducted October 2016; formulated in February 2017):

In the Far East most full-service deluxe hotels are larger than anywhere else in the world except perhaps the UAE. The trend here, is toward hotels in excess of 400 rooms.

* These are base salaries only, benefits vary from company to company. See International Hong Kong and Macau only, local and expatriate salaries were polled as equal

^A Stand-alone restaurant associated with a hotel

^M Some regional responsibilities but still maintain single unit responsibilities

Note: Japan and Malaysia are tied and pay the lowest salaries of the groups polled. The largest increases in compensation occurred for Mandarin speaking middle and senior executives in China.

* In some cases base salary have not increased significantly or not at all. But benefits which are not taxable have increased.





2017 FAR EAST SALARY SCALE

Revised in February 2017

These salary scales are for Philippines, Thailand, Singapore, Malaysia, Indonesia and Vietnam.
This Guide is for Deluxe Hotels with a Minimum Average Room Rate of **US\$175**
Salaries Net of Income Tax except for Singapore ^{xi}

300 Rooms - 500 Rooms 4-5 star International Rated Hotels

Annual Salary, US\$(1000s)

Positions	Lowest Reported Jan 2016 - Jan 2017	Highest Reported Jan 2016 - Jan 2017	Average of Jan 2016 - Jan 2017	Average % Change Jan 2012 - Jan 2017
General Manager	94.3	^L 560	125.9	+24%
Resident Manager ⁺	55.8	^L 185	68.2	+15%
Rooms Division Manager	48.1	86.3	61.2	+15%
Front Office Manager	35	72.5	54	+16%
Executive Housekeeper	48.5	82	65.4	+28%
Chief Engineer	65.1	115	75.3	+19.6%
Laundry Manager	32	55	43.6	+11.4%
Food & Beverage Director ⁺⁺	64	128	79.7	+33.7%
Restaurant Manager (Fine Dining Room)	40.1	66	51	+22.5%
Catering Manager (Sales)	35	55	48.2	+13.5%
Banquet Manager (Operations) [^]	33	57	44.5	+20%
Executive Chef	67.5	175	84.3	+20.2%
Gourmet Restaurant Chef	56.3	92.3	70.9	+30.6%
Executive Sous Chef	42	65.5	50	+23%
Italian Chef	50	85.9	62.1	+34%
Pastry Chef	47.7	74.3	50	+25%
Comptroller	52.1	85.6	68	+25.3%
Personnel & Training Manager	45.5	76.3	59	+29%
Sales & Marketing Director	70.8	143.2	94.2	+45%
Sales Manager (No. 2)	44	77.1	57.9	+15.9%
Revenue Manager	36.8	54.2	42.3	+9%
IT Manager	40	62.6	42.1	+9.3%
Social Media Director ^H	24.5	77.6	38.1	+11.4%

Notes: Survey reviewed in February 2017

Some increase solely due to currency exchange

Top salaries in this region are in Philippines

J Some base salaries are inclusive of benefits including housing and transportation allowance

L Casino environment. Minor increase as 3rd year of open contract

A Held GM title but had regional responsibility

B This included all benefits in salary, i.e. a car, housing allowance etc. Therefore paid taxation on entire package because of company policy

* First time GM

** Multi-unit responsibility as well

** Properties contained over 800 rooms plus auxiliary services

+ No. 2 in command of the hotel

++ Sometimes the term is Executive Assistant Manager – F&B, and the position is No. 2 in the hotel due to the size of the property; in which case the food and beverage director's salary as described may be increased 10% to 15% to compensate for a more senior title

Median is defined as a number that represents a midpoint between extremes on a scale of valuation. In some cases where one salary was either ridiculously high or low, we removed it as it would have distorted the true median salary range.

Average is achieved by totaling all salary information received and dividing by the number of respondents.

Comments

In the Far East most full service hotels are larger than anywhere globally, except perhaps UAE. The trend here, even in three and four-star hotels, is hotels in excess of 400 rooms. Budget and suite hotel groups (long-term-stay properties) have tripled in last 5 years, especially limited service models like Holiday Inn Express and IBIS Properties.

Expatriates salary survey only.

All are base salaries only, benefits vary from company to company. See our **International Benefit Program Survey**.

J Benefit Program Survey.

For the 7th year in a row Thailand's salaries are 'world average' meaning an expatriate in Thailand earns the average of any country where many hotels are expatriate managed. Thailand has the second lowest cost of living in South East Asian countries where expatriates are hired.

^A Gratuities, which are an important part of the income in banquets, are not included but have increased substantially in the last 3 years.

* In some cases base salary have not increased. But benefits which are not taxable have increased.

Overview: In 2016-2017 we saw little or no substantial increase over previous year. In fact, some salaries and averages declined; this was the first time in a decade.

XI Sometimes accommodation allowance & other benefits are included in the salary





2017 CARIBBEAN SALARY SURVEY

Revised in February 2017

Positions	Lowest data received International Career Expert		Highest data received International Career Expert		Average Compensation paid International Career Expert	
	2012	2017	2011	2017	2012	2017
General Manager	75	98	³ 325**	4550	96	139
Resident Manager +	58	64	³ 130	160	60	68.5
Rooms Division Manager	48.5	48	67	385	50	55
Front Office Manager	40	38.1	55	³ 70	44	50
Executive Housekeeper	42	47	72	105	50	68
Chief Engineer	49	52	³ 110	210	60	³ 75
Laundry Manager	Local Hires		Local Hires		Local Hires	
Food & Beverage Director ++	48	54	80	³ 125	65	³ 71.3
Oriental Chef in Chinese	No Info	48.1	No Info	485	No Info	65
Social Network Manager	No Info	26.8	No Info	65	No Info	47
Restaurant Manager * (Fine Dining Room)	37	38	50	55	45	48
Catering Manager (Sales) *	32•	34	56•	65	38•	45.1
Banquet Manager (Operations) *	32•	34.5	36•	50	36•	38.4
Executive Chef	50	56.9	105	³ 145	60	66.5
Gourmet Restaurant Chef	38	48	85	111	48	58.7
Executive Sous Chef	36	39.9	60	60	47.2	50.2
Italian Chef	38.5	44	77	90	50	58.3
Pastry Chef	38	39.4	78	85	49	52
Comptroller / Director of Finance	52	58	99	⁴ 225	70	83
Human Resources & Training Manager	46.1	48.5	75	98	49.9	56.8
Sales & Marketing Director	52	61	³ 100	⁴ 160	65.6	85.3
Sales Manager (No. 2) or Dir. of Sales	34	38	60	⁴ 75	41	52
Revenue Manager	36	38	55	62	42.6	47.9
IT Manager	36	39	55	61	45	47.4

Notes & Comments

This survey is for generally expatriate-paid jobs. Most Caribbean islands hire expats for a variety of roles in the luxury brands. Still many islands due to work visa restrictions will offer these same roles to qualified local residents. Therefore, some local professionals are paid the same salaries as expatriates, but not always with the same benefits as expatriate employees. Locals pay tax where applicable; as expatriates have taxes paid for them. Expatriates can always also be hired where the island has not enough local workers available to fill hotel or restaurant management needs. The higher salaries (highest reported) are generally from casino hotels or "very high end" Leading Hotels of the World" or "Trophy Resorts". Some of these have less than 50 keys and an average room of over \$1000/night. Strangely enough, the higher the room rate did not always equate to higher salaries for staff. In some cases, they were on the bottom of the salaries paid. The survey was complicated as independent privately owned resorts pay

salaries as to what they "feel like" without concern for budgets or any salary ranges. Private owners who run resorts themselves do not disclose their true salaries or funds they take personally or from the operation either.

** Most resorts in Caribbean are small and have less than 200 rooms except in Bahamas where some go up to 2000 rooms like Atlantis and soon to open Bahamar. Salaries in Bahamas are "stand-alone" as these large properties in Nassau offer very unique career opportunities and salaries. Visas in the Bahamas are difficult and the cost of living is very high as opposed to other islands whose visa restrictions are less stringent.

+ Sometimes can be called EAM/Rooms or EAM/F&B deputies for GM.

• Gratuities not included.

~ Most local hires instead of expat hires due to visa restrictions.

* The soon to open Bahamar has will have great effect on this survey for 2018





2017 EAST & WEST COAST USA SALARY SURVEY+

Revised in April 2017

This survey is for Deluxe Hotels with a Minimum Average Room Rate of **US\$300** (For San Francisco & NYC area.) Salaries are considered gross (with no deductions) in USA Dollars (Annual Salary 'USA 1000s'). Only base salaries shown. Benefits, bonuses or stock options etc. are not included.

This survey is carried out on hotels with **up to 800 Rooms** and have **4 or 5 Diamonds** (USA Ratings).

This Salary Guide is produced in an **average format** where all information is totaled and divided by the number of replies.

Positions	2015 - 2017 Lowest figure received	2015 - 2017 Highest figure received	Jan 2016 - Jan 2017 Average
VP Operation supervising a maximum of 15 properties (No more than 4000 rooms) with major brand or franchise	245	525	375
VP Human Resources supervising a maximum of 15 properties (No more than 4000 rooms) with major brand or franchise	185	375	275.4
VP Sales & Marketings supervising a maximum of 15 properties (No more than 4000 rooms) with major brand or franchise	225	400	286
GM/VP based at one hotel overlooking up to 5 hotels	200	445	279.1
VP Finance supervising a maximum of 15 properties (No more than 4000 rooms) with major brand or franchise	225	333.8	265
General Manager	165	455*	220
Resident / Hotel Manager	90	225	138.3
Rooms Division Manager	70	143.1	92.1
Front Office Manager	65	97	80
Executive Housekeeper	65	165	88
Chief Engineer	78	175	95.7
Revenue Manager	48	96.5	61.9
Food & Beverage Director	75	285	120
Restaurant Manager (Fine Dining Room)	48	96	63.9
Catering Manager (Sales)	45	110	67.5
Banquet Manager (Operations)	46	105***	62.8
Executive Chef	65.3	215.9	108
Gourmet Restaurant Chef	63.5	**150	99.5
Executive Sous Chef	62.9	95	80.8
Financial Comptroller	72.5	185	127.3
Human Resources & Training Manager / Director	64.1	125	91
Sales & Marketing Director	80.4	236	140.2
Sales Manager (No. 2) or Dir. of Sales	68	† 121	75
Social Media Director	35+	75+	53+

* This was for a hotel with components of a residence building and huge catering facilities hotel.

** This was outsourced Michelin star standard hotel restaurant.

*** Major banquets.

Average is achieved by totaling all salary information received and dividing by the number of respondents.

† Only 4th year on our survey list.

‡ This was a sales manager MICE and total package includes incentives reached over 200K.

This salary survey was conducted using NYC, San Francisco, Chicago, Boston, Miami, and Los Angeles as competitive sets.

For the West Coast we also included San Diego.

Salaries for other areas in the USA are less than New York and San Francisco. Please use as a basic guide Chicago minus 9%, Midwest States minus 20%, Southern California (except San Diego) minus 15%, Southeast US (except Miami) minus 18% and Hawaii plus 10%. These are approximate numbers for this study. If you wish more specific numbers, please request for detailed area data.

New York and San Francisco historically have challenges in finding middle and lower level staffs due to high living costs in both cities. Salaries and opportunities are lowest in South East USA (except Miami) and Middle West states.

Best opportunities are available in the North East, the North West states.

Las Vegas and other gaming venues are discussed in our gaming study.





UAE 2017 SALARY SURVEY

Revised in April 2017

Average Salaries for Four & Five-Star Hotels Only. Covering Expatriate Positions only throughout the UAE.
All Salaries *Are Tax Free (in 000s US\$) for Hotels with Average Room Rate of US\$200+

Positions	Average Salary September 2012 ▼ January 2017 350+ Rooms 5 years study	% Change September 2012 ▼ January 2017 5 years review	Current Average February 2016 ▼ February 2017 One year study	Current Highest Reported February 2016 ▼ February 2017 Current Information
General Manager	⁵ \$126,000	+43%	⁵ \$135,400	⁵ \$550,000
Resident Manager (could also be Director of Operations or Hotel Manager)	\$79,000	+20.50%	\$83,100	¹⁰ \$160,000 ⁸
Exec. Asst Manager (could also be EAM F&B/Rooms or deputize as GM)	\$69,000	+32.50%	\$73,000	¹⁰ \$150,000
Director of Finance	\$69,500	+29%	\$72,800	¹⁰ \$143,500
Director of Rooms (Rooms Division Manager)	\$60,100	+34.50%	\$70,000	¹⁰ \$125,000
Director of Housekeeping	\$54,500	+29%	\$57,600	\$102,000
Director of Food & Beverage	\$65,000	+50.30%	\$71,900	⁷ \$170,000
Executive Chef	\$65,400	+33%	\$68,900	¹⁰ \$175,000
Director of Catering/C&B	\$44,000	+15%	\$42,000	\$70,000
Director of Sales & Marketing	\$81,000	+48.50%	\$85,000	¹⁰ \$202,000
Director of Engineer	\$69,500	+37.30%	\$70,000	¹⁰ \$150,000
Director of IT	\$40,000	+16%	\$41,900	\$60,000
Director of Human Resource	\$49,600	+41%	\$56,000	\$125,000
Director of Revenue	\$38,900	+15%	\$40,000	\$68,900
Director of Social Media	Not available	^{6*} +5.00%	\$39,700	\$70,400
Pasty Chef	30,000	+18%	\$40,400	¹⁰ 77,800
Italian Chef	36,800	+29.5%	\$48,000	¹⁰ \$90,300
Asian Chef – Japanese / Chinese	41,600	+32.6%	\$47,600	¹⁰ \$121,000 ¹¹ ¹⁰ \$125,000 ¹¹

For the last 12 months, the UAE hiring has "flat lined". With many new openings hiring has continued aggressively but no massive salary increases except for some specialty operations. The UAE allows employees to move from one employer to another therefore more incestuous recruitment and recently with little increases except for cost of living.

The region continues to draw largely European and Asian Senior Managers, with Rank and File expatriate staff from the developing world.

Standard expatriate benefits include live-in or housing allowance, medical. Bonuses are not included.

The informant respondents are from the top 40, 4 and 5-star hotels in UAE. It includes all expatriates including India, Philippines, Switzerland, Europe, North America, etc. Bonuses vary from 1 to 2 months, some up to 40% of base salary.

+ Average room rates for 2016-2017 have not increased but decreased.

⁵ Sometimes base incomes which is always net of taxes includes the housing allowance.

^{6*} 3 year review only.

* General Manager title and responsibilities only. There was a General Manager/Vice President in Dubai earning almost US\$ 550,000 annual salary in 2016, but who recently left his role.

** F&B only, no other responsibilities, single unit.

*** Most repeated comments were that cost of living increases, especially housing have caused uneasiness; an issue from employers' and employees' perspective in negotiating new contracts or extensions and the high cost of schooling (a 15% increase in 2016-2017).

**** Single Unit

⁷ In this situation, F&B outlets produce more revenue than rooms by far! This individual was previously holding a corporate role in Europe.

⁸ This is hotel manager reporting to VP position of the company, independent luxury brand.

⁹ Michelin star Cantonese chef (brought his entire kitchen team with him).

¹⁰ Difference in currency exchange.

¹¹ Celebrity Japanese Chef – outsourced restaurant.





*LONDON & UK AVERAGE SALARY SCALE Study from December 2011 to December 2016

Positions	London Area Only 75-300 Rooms		UK (Excluding London) 75-300 Rooms	
	Study Completed 16 Feb. 20 Comparison Change 2011-2016	Study Formulated Feb. 2016 - Average 2015	Study Completed Feb. 2016 Comparison Change 2011-2016	Study Formulated Feb. 2016 - Average 2015
General Manager	88.2	119	60	98
Exec / Assistant Manager / Resident	48	96.8	39	82
Rooms Division Manager	36	77.1	32	61
Front Office Manager	28.3	46.3	25.5	38
Executive Housekeeper	38.9	51.8	36	39.3
Chief Engineer	43.7	61.1	39.9	56
Food & Beverage Director	49.8	72	44	64.6
Maître d'hôtel Fine Dining	31	39	29	33
Catering Manager	33	37.8	29	32
Banquet Manager	33	45	30	40
Executive Chef	49.6	78	44.3	65.9
Gourmet Restaurant Chef	39.5	46.2	32.1	41
Executive Sous Chef	38.4	47.9	32	45
Pastry Chef	37.1	49	30	45
Comptroller	48	64	40	52
Personal Manager	36	48.2	31	42
Sales & Marketing Director	54.4	88.3	46.1	69.8
Revenue Manager	32	40.9	27	36
IT Manager	35	35	28	31
Social Media Director	N/A	36.6	N/A	29.2
Security Director	25.5	35.8	22.2	26

Note: This chart is for 4 and 5 star international standard hotels only, including major brands and trophy hotels. Basic salary in English Pounds Gross.

The hotels still suffer from a shortage of middle management category staff especially culinary, sales and room executives. Some salary increases due to currency exchange differences from 2015.

* The 2017 study will be revised in September 2017





CANADA

Revised in February 2017



Chart of Average Gross Sales (No Benefits) for Senior Management – Luxury Segment
I.e. Ritz, Four Seasons, Trump, Shangri-La, and Select independent and Trophy Hotels

Positions/City	Montréal	Toronto	Vancouver
General Manager	210,000	245,000	235,000
Resident Mgr/Hotel Mgr/EAM F&B	120,000	135,000	125,000
F & B Director	111,000	115,000	110,000
Rooms Division Manager	90,000	100,500	95,000
Executive Chef	101,000	128,000	112,000
Executive Housekeeper	84,000	93,000	88,000
Director of Finance	116,000	125,000	120,000
Director of HR	94,000	100,000	96,500

WORLDWIDE SPA SURVEY 2017

Historically, spa operations were treated by management as similar to other revenue departments like food and beverage or telephone. These departments were simply perceived to be amenities needed to attract guests to the hotel. As long as these departments broke even, or didn't lose too much money, their ability to increase occupancy was deemed sufficient justification for their existence. However, in the last ten years, hotel spas have followed the path of the other operating departments and transformed from support facilities to profit centers.

From 2011 to 2016, Renard International's poll showed that when spas are operating in conjunction with a hotel, they represented 12.2% of sales. (See Renard Spa Dictionary of all terms used in spa treatments at www.renardnewsletter.com in the article archives)

2017 INDUSTRY SALARY SURVEY IN USA \$ (000'S)

DAY SPA - HOTEL RESORT SPA

Position	Day Spa				Hotel/Resort Spa			
	Canada USA		International		USA Canada		International	
	2006	2016 ⁵	2006	2016 ⁵	2006	2016 ⁵	2006	2016 ⁵
VP Spa Director Single Unit Manager Only	No data	\$90-125	\$70-90	\$90-130	\$52-82	\$60-85	\$50-70 ²	\$65-90 ²
Spa Director/Manager (Sometimes a #2)	\$20-33/hr \$50-60K/yr	N/A ³	34-42K/yr	36-43K/yr	\$38-48	\$40-55	\$34-45/yr ²	\$36-48 ²
Licensed Massage Therapist	\$11-21/hr	\$15-25 ³	As country salary policy dictates (Europe is higher than Asia, etc.)		\$15-22/hr	\$15-30 ¹	As country salary policy dictates (Europe is higher than Asia, etc.)	
Reflexologist	hourly	hourly ¹	hourly ³	hourly ³	hourly	hourly+		
Kinesiologist	hourly	hourly ¹	hourly ³	hourly ³	hourly	hourly+	hourly ³	hourly ³
Clinical Nutrition Manager	\$36-48K/yr	\$35-49	\$40-45	\$42-49				
Chef	\$15-20/hr	\$25-30/hr	\$30-36	Average \$36-45/yr	\$60-120K/yr	\$75-90	\$36-50 ²	\$48-65 ²
Aestheticians	hourly	hourly ³	As country policy dictates		\$15-20/hr	\$20-25 ³	As country policy dictates	

Note:

- International expatriate roles, always includes tax free salary + accommodation.
- Canada and U.S.A. are gross salaries. No expatriate benefits except sometimes an allowance for cell phone, health program, meals on duty, and sometimes travel allowance. There is a huge variance in executive chef salary, depending on the duality of the spa, and whether it is a day or overnight spa.
- ¹ Hourly gross
- ² Expatriate benefits apply
- ³ Hourly plus some expatriate benefits
- ⁴ Self Managed, not outsourced or franchised to a spa management company
- ⁵ The lowest figure of each range in the column is the average of all compensation data received. The highest figure of each range in the column is the highest salary figure reported to us.

WORLDWIDE SPA SURVEY 2017

2017 INDUSTRY SALARY SURVEY IN USA \$ (000'S) MULTI-UNIT POSITIONS

Position	Multi-Unit Positions			
	Canada USA		International	
	2006	2016 ⁵	2006	2016 ⁵
VP Spa Director 2 or more units	\$95-105	\$100-155	\$100-125	\$120-175
Spa Director Single Unit Management Only	\$80-110	\$80-125	\$76-90	\$80-150
Spa Director/Manager (Number 2 in Spa)	NOT APPLICABLE	\$50-75	NOT APPLICABLE	\$48-72
Licensed Massage Therapist	No Information Available	hourly	No Information Available	hourly ³
Reflexologist	hourly	hourly	hourly ³	hourly ³
Kinesiologist	\$36-45	\$36-50	\$23-25 ³	\$29-50 ³
Clinical Nutrition Manager	\$50-60	usually outside consultant	usually outside consultant	usually outside consultant
Executive Chef ² (more than one unit)	\$60-110	\$65-150	\$40-61 ²	\$52-80 ²
Aestheticians	\$15-25/hr	As company policy dictates	As company policy dictates	As company policy dictates

Notes:

- These are average salaries and include in our calculation all spa types i.e. Day, Destination etc.
- International expatriate roles, always includes tax free salary + accommodation.
- Canada and U.S.A. are gross salaries. No expatriate benefits except sometimes an allowance for cell phone, health programs, insurance, meals on duty, and travel.

Note: There is a huge variance in this executive chef salary, depending on the duality of the spa, and whether it is a day or overnight spa.

³ Hourly gross

³ Expatriate benefits apply

³ Hourly plus some expatriate benefits

⁴ Self Managed Spa, not outsourced or franchised to a spa management company

⁵ The lowest figure of each range in the column is the average of all compensation data received. The highest figure of each range in the column is the highest salary figure reported to us.

2017 INDUSTRY SALARY SURVEY IN USA \$ (000'S) DESTINATION SPA

Position	Destination Spa			
	Canada USA		International	
	2006	2016 ⁵	2006	2016 ⁵
Spa Director Single Unit Management Only	\$73-85	\$75-100	\$73-80	\$75-100
Spa Director / Manager (Number 2 in Spa)	\$39-50	\$48-60	\$36-48	\$40-60
Licensed Massage Therapist	\$15-24 hr	Hourly based on location	As country salary policy dictates (Europe higher than Asia, etc.)	Hourly based on location
Reflexologist	hourly	hourly	Hourly based on location ³	Hourly based on location ³
Kinesiologist	\$25-31	\$28-39	\$20-25 ³	\$24-40 ³
Clinical Nutrition Manager	\$42-50	\$43-60	usually outside consultant	usually outside consultant
Executive Chef Single Unit (one or two outlets only)	\$52-80	\$60-100	\$36-52	\$48-72
Aestheticians	\$15-20/hr	Hourly based on location	As country policy dictates	Hourly based on location

Notes:

– International expatriate roles, always includes tax free salary + accommodation.

– Canada and USA are gross salaries. No expatriate benefits except sometimes an allowance for cell phone, health program, meals on duty, and sometimes travel allowance.

¹ Hourly gross

² Expatriate benefits apply

³ Hourly some expatriate benefits

⁴ Self Managed, not outsourced or franchised to a spa management company

⁵ The lowest figure of each range in the column is the average of all compensation data received. The highest figure of each range in the column is the highest salary figure reported to us.



INTRODUCTION TO COMPENSATION IN THE GAMING INDUSTRY - 2017

In 1995 when we researched our first Gaming Compensation Study, the report was restricted solely to Las Vegas and Atlantic City. Online Gambling was non-existent.

22 years later, much has changed. Online gambling is the fastest growing gaming product worldwide, and experts predict its revenue for 2017 to be over 10 billion US dollars.

In our 2017 report, we examine total cash compensation for senior executives. We have formulated our surveys using data from almost 100 gaming corporations. Our sources include self-reports and tax filings from public companies, personal resources, direct requirements from searches we have received, along with our salary survey data, which we solicited.

Our most noteworthy comment in 2016 on gaming is that it has taken us "one step closer to global acceptance," adding new locations in 2015 such as Cyprus, Albania, Cape Verde, Massachusetts (Boston), India (State of Maharashtra), Israel (soon to be approved), Gibraltar, Saipan and Montenegro.

Overall, almost every state in the USA, all provinces in Canada, and over 35 countries now offer some form of legalized gambling. There are over 220 gaming jurisdictions, including parts of Macau, Singapore, Malaysia, Bahamas, Philippines, Saipan, Korea, Netherlands, Antilles, UK, Switzerland and Vietnam.

As part of this growth, the need for experienced casino management talent has become both extremely competitive and cutthroat, especially for difficult postings in faraway countries. As a result, pressure to adequately compensate executives continues to be a major factor. Most of the major publically listed casino organizations even offer their key employees stock or stock options.

Will every location soon have a gaming establishment next door? Why not? As governments desire these huge tax windfalls, from the gambling business.

Another notable observation is that even though the revenue pie from gaming increased substantially in 2015, it is now shared with more operators. Additionally, historic venues such as Las Vegas and Macau did not increase their revenue significantly. In fact, these hubs lost some of their leading share of the global gaming revenue pie.

An aspect of our study worth noting is the major difference in compensation between large and small players in the gaming industry, and between those which are publically listed as opposed to those which are privately held.

For example, a CEO of a small, privately-held gaming group may earn a base salary, bonus and stock totaling \$500k (USD), compared to a large, publically listed organization where the CEO may earn in excess of \$20M (USD).

For 2016, we did not consider any Black-Schole evaluations, where the value of the stock granted in previous years had substantially higher or lower value than the year it was granted.

Another consideration: in previous years, there was a separation of income by country and venue. With the increased worldwide growth of casinos, salaries are now more aligned with less distinction.

In previous years, we also focused primarily on major North American gaming areas. In 2016, we have added in-depth information on international casino groups, although many are still USA-controlled. This year, we also took special notice of SE Asian gaming establishments in Malaysia, Macau, Vietnam and the Philippines.

The location and size of casinos matter with regards to basic compensation levels. On the other hand, bonuses remain fairly consistent as a percentage of base salaries. In other words, many companies offer higher base incomes, however their bonus percentages (i.e. 25% - 50% of the base) remain consistent.

As the gaming industry grows, the escalation of pay seems inevitable. What does this means for gaming companies?



The answer: higher payrolls, greater utilization of computerization, higher incentives and the overwhelming need to retain management talent. The catalyst for this is specialized US gaming, which is prevalent almost everywhere and adheres to the most stringent legal hiring requirements for gaming licenses.

Overall, the majority of key casino employees hail from the USA** or Canada, which we call the Renard Birdcage Effect*. On the other hand, operation executives (non-gaming executives) can come from a more diverse range of places around the world.

As a result of worldwide casino growth, including many with no USA affiliation, American gaming consultants are training local executives. Therefore a non-American casino corporation rather than hiring more expensive American casino management, these casinos can now employ locals with the ability to operate American-style casinos.

Our overall opinion is that 2017 (like 2016) will continue to be a global scavenger hunt for these American-trained casino executives. Additionally, incestuous employment policies along with engagement bonuses will continue to be the norm.



Notes:

- * *The Renard Birdcage Effect* refers to shaking the birdcage, causing the birds to change perches (talent moves from one company to another), however they are the same birds.
- ** American citizens or green-card casino executives (even offshore) pay some USA taxes, therefore American citizens are not tax-free and require financial incentives to recruit.

GLOBAL

2016 Casino Executive Committee Member Compensation Report
Hotel Component for All Locations Outside of Canada and USA - Including
Macau (China), Singapore, Philippines and Nassau (Caribbean)

Average Format USA Dollars (Single Unit Responsibilities Only)

Designation	Salary	
	Average	Highest Reported
Hotel Component		
General Manager **	\$185,740	\$348,400
Executive Chef ***	\$75,400	\$143,000***
Executive Sous Chef	\$62,500	\$90,400
Hotel Resident Manager*	\$76,100	\$141,600
Food & Beverage Director	\$72,400	\$120,100
Executive Housekeeper Casino Public Areas and Hotel	\$65,900	\$101,000
Hotel Security Manager	\$59,150	\$89,500
Hotel Director of Sales & Marketing	\$95,700	\$145,350
Hotel Financial Controller of a Single Unit or Department	\$72,000	\$120,200
Social Network Manager	\$31,900	\$48,100
Revenue Director	\$48,650	\$66,400
Human Resources Director – Hotel staff only	\$75,000	\$109,100

Gross or net depends on jurisdiction i.e. Macau, Singapore is gross, Bahamas is net.

- Size of hotel for this study was 500 Rooms or larger.
- Benefits or bonuses are not included.
- Some employees in this study had extensive tenure with these hotels/casinos.
- Size matters! The highest compensation logically goes to the casino and hotel which are the largest with biggest revenues.
- Average salary for a branded or well established Casino Hotel.
- 18 casinos used for this survey. Some casinos did not have a hotel component or were not associated with a connecting or a nearby hotel.
- Single unit responsibility only.

This does not include other perks nor stock or stock options. These are the most senior individuals overseeing a single unit; but may report to an individual in another division if it is a multi-unit organization.

- Titles are diverse as many operators use different designations due to size of complex or for historic reasons.
- Bonus programs potentially differ greatly between branded and independent operations.
- Long-term tenure employees are logically the highest paid and so have a great effect on base income calculations.
- This does not include any initial hiring bonuses.

* May be termed as Hotel Manager, Director of Operations or EAM reporting to the General Manager.

** Hotel operations ONLY and reports to the CEO of both the Casino and Hotel.

*** In this scenario all restaurants managed by the casino hotel non outsourced, but some operated under license.

All receive expatriate benefits.



GLOBAL

2016 International Casino Executive Committee and Department Head Salary Survey - All Locations Outside of North America (USA & Canada)

Average Format	USA Dollars	
Designation	Salary	
**CASINO EXECUTIVES		
	Average Base Salary	Maximum Salary Reported
CEO Casino & Hotel Operations	\$396,850	\$865,000
CEO Hotel Services only	\$274,000	\$355,900
VP Casino & Hotel Operations	\$211,050	\$275,100
VP Casino Player Sales & Marketing	\$125,500	\$199,750
VP Sales & Marketing Hotel Division	\$139,800	\$190,225
Casino Property Finance	\$136,225	\$298,400
Property Hotel Operations (Rooms Division Manager) Paiza Manager	\$89,125	\$126,200
Inside Casino Operations Food & Beverage Manager	\$89,600	\$119,900

*DEPARTMENT HEAD CASINO ROLES – NOT EXCOM MEMBERS

Role	Salary	
	Average	Highest Reported
Surveillance Operations Manager (#2)	\$72,950	\$136,600
Slot Marketing Manager (#2)	\$61,400	\$143,800
Gaming Dealer of Multiple Games	\$32,850	\$60,000
Cage Manager	\$66,700	\$148,350
Casino Pit Manager	\$61,450	\$128,100
IT Manager	\$65,500	\$73,000
Graphic Designer	\$46,000	\$61,950
HR Director Casino staff only	\$81,550	\$120,640

- Gross or net depends on jurisdiction i.e. Macau, Singapore is gross, Bahamas is net.
- Size of hotel for this study was 500 Rooms or larger. Benefits or bonuses are not included. Some employees in this study had extensive tenure with these hotels/casinos. Size matters! The highest compensation logically goes to the casino and hotel which are the largest with biggest revenues. Average salary for a branded or well established Casino Hotel.
- 22 casinos used for this survey. Some casinos did not have a hotel component or were not associated with a connecting or a nearby hotel.
- Single unit responsibility only.
- * All receive some expatriate benefits.
- ** All receive full expatriate benefits, including schooling for all their children if applicable.

This does not include other perks nor stock or stock options. These are the most senior individuals overseeing a single unit; but may report to an individual in another division if it is a multi-unit organization.

- Titles are diverse as many operators use different designations due to size of complex or for historic reasons.
- Bonus programs potentially differ greatly between branded and independent operations.
- Long-term tenure employees are logically the highest paid and so have a great effect on base income calculations.
- This does not include any initial hiring bonuses.

Note: Some salaries and bonuses have been lower, reflecting the challenges faced by some casinos in 2015. Some inflation in salaries is solely due to changes in currency exchange

NORTH AMERICA

USA & Canada Hotel Department Head Salary Survey
Average Salary For a Branded Or Well Established Casino
750 Rooms Or Greater (as of January 2016)

Role	Salary	
	Average	Highest Reported
Executive Chef	\$90,430	\$166,000
Executive Sous Chef	\$65,650	\$111,100
Hotel Resident Manager	\$72,950	\$121,600
Food & Beverage Manager	\$95,125	\$132,640
Executive Housekeeper Public Areas	\$52,230	\$90,000
Security Manager	\$89,450	\$126,300
Director of Sales	\$73,430	\$111,720
Financial Controller of a Single Unit or Department	\$74,650	\$136,000
Social Network Supervisor	\$33,600	\$52,800
Revenue Manager	\$44,750	\$76,000

CASINOS

Role	Salary	
	Average	Highest Reported
Surveillance Operations Manager (#2)	\$66,350	\$111,300
Slot Marketing Manager (#2)	\$60,430	\$132,400
Gaming Dealer of Multiple Games	\$32,640*	\$48,100*
Cage Manager	\$64,100	\$148,000
Casino Pit Manager	\$66,800	\$136,200
IT Manager	\$75,000	\$107,800
Graphic Designer	\$52,050	\$75,640
HR Director	\$77,760	\$121,900

Note: The great majority of source information for this survey came from Las Vegas hotels.

*Gratuities increase salary substantially as this is an hourly paid role.

- Size of hotel for this study was 1000 Room Casino Hotel or larger.
- Benefits or bonuses are not included.
 - Some employees in this study had extensive tenure with these hotels.
- Size matter; highest compensation logically goes to the casino and hotel which are the largest with biggest revenues.

Note: Some employees are unionized, no expatriate benefits offered.

RENARD INTERNATIONAL HOSPITALITY SEARCH CONSULTANTS*



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