

OREGON WINE INDUSTRY LABOR SURVEY 2017

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OUTLINE

- **Purpose of Survey and Methodology**
- **Basic Demographics**
- **Salary Information**
- **Salary by Case # and Region**
- **Gender**
- **Compensation and Standard of Living**
- **Conclusion**

PURPOSE OF LABOR SURVEY

- **Provide data for the Oregon Wine Industry**
- **Mirror the Wine Business Monthly Salary Survey**
- **Provide other pertinent data for the wine industry**
- **Assist wine producers in extrapolating from the benchmarks we can provide through this survey**

METHODOLOGY

- During Fall of 2017, Survey was designed with input of industry members, and pre-tested.
- Survey was sent out via Survey Monkey from Professor Jeff D. Peterson at Linfield College to OWB e-mail list.
- There were a total of 188 respondents, however, there are filter questions so that producers who do not have vineyards, tasting rooms, or wineries, can opt out from those questions. This is one reason the numbers of respondents vary.
- The data were “cleaned” after the survey was closed, which means that outliers that were clearly errors in responses, are removed.

A NOTE ON INTERPRETING THE RESULTS

- There are a number of places where the number of data points is very low, with fewer than 5 respondents in a cell. In those cases, we should be very cautious in assuming that those are reliable.
- However, one can also look at the overall average, averages from other cells, and decide how comfortable one is with that information.
- In addition to the mean, or average salary, we have also provided the median salary, in some tables. This is another measure of central tendency, and is the point at which 50 percent of the responses fall below a given line, and 50 percent fall above a given line. This is another way judge where the salary levels fall with respect to the rest of the industry.

FACILITIES AND CASES PRODUCED

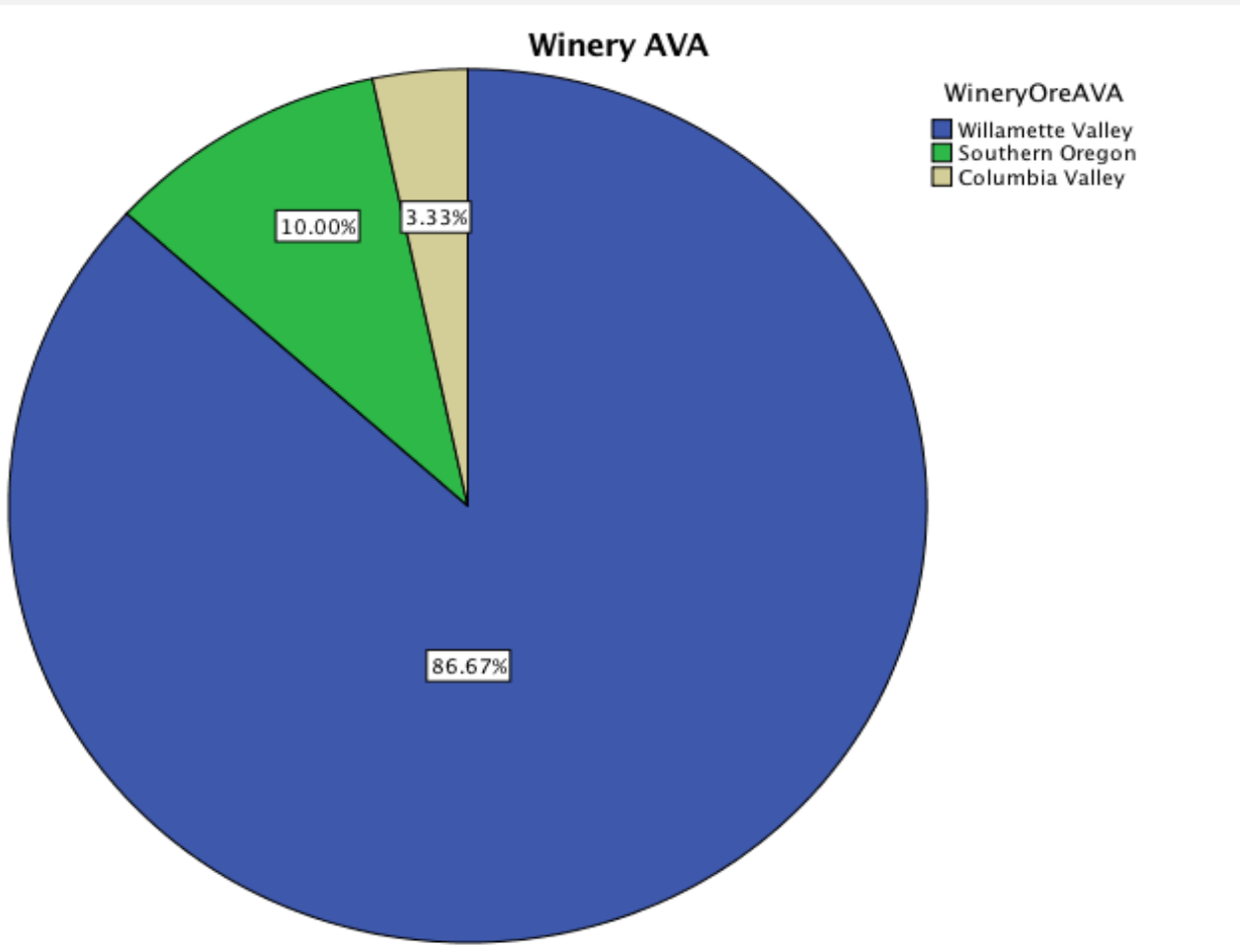
Types of Facilities of Producers, 2017.

Facility	Yes	No
Tasting Room	155	33
Winery	92	31
Vineyard	98	31

Oregon Total Cases Produced, 2017.

Total Number of Cases Produced	Frequency	Valid Percent
Fewer than 2500 Cases	22	24.4
2,501-5,000 Cases	21	23.3
5,001-10,000 Cases	15	16.7
10,0001-20,000 Cases	15	16.7
20,000+ Cases	17	18.9
Total	90	100.0

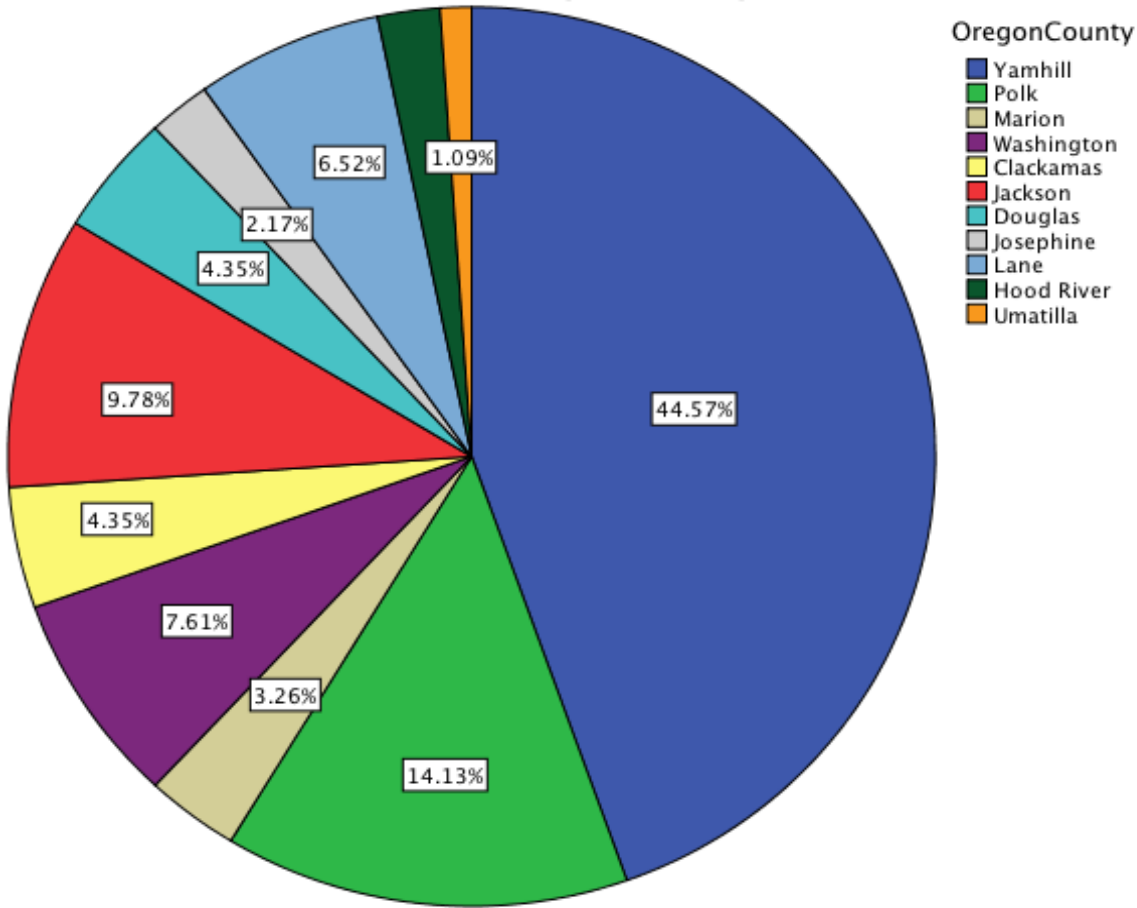
WINERY, OREGON AVA, 2017



AVA by County, 2017.

County	Frequency	Valid Percent
Willamette Valley	78	86.7
Southern Oregon	9	10.0
Columbia Valley	3	3.3
Total	90	100.0

Vineyard County



VINEYARD COUNTY OREGON, 2017.

County	Frequency	Valid Percent
Yamhill	41	44.6
Polk	13	14.1
Marion	3	3.3
Washington	7	7.6
Clackamas	4	4.3
Jackson	9	9.8
Douglas	4	4.3
Josephine	2	2.2
Lane	6	6.5
Hood River	2	2.2
Umatilla	1	1.1
Total	92	100.0

EXECUTIVE AVERAGE SALARIES AND MEDIAN SALARIES, BY POSITION, 2017.

Base Salary Reported	Total Reported	Oregon Average Salary	Oregon Median Salary
GM or President	51	\$91,815	\$70,000
Director/Nat'l Director Sales	31	\$89,709	\$75,000
Director of Marketing	15	\$71,731	\$68,000
Controller/Director Finance	23	\$77,170	\$75,000
Regional Sales Director	16	\$64,875	\$60,000
Human Resources Director	10	\$66,250	\$68,000

TASTING ROOM. AVERAGE SALARIES AND MEDIAN SALARIES BY POSITION, 2017.

Base Salary Reported	Total Reported	Oregon Average Salary	Oregon Median Salary
Direct to Consumer Sales	16	\$55,693	\$57,500
Wine Club Manager	23	\$44,382	\$44,000
Tasting Room Manager	72	\$41,376	\$40,000
Special Events Manager	11	\$42,500	\$38,000
Tasting Room Staff	32	\$28,762	\$30,000

WINERY AND VINEYARD. AVERAGE SALARIES BY POSITION, 2017.

Base Salary Reported	Total Reported	Oregon Average Salary	Oregon Median Salary
Executive Winemaker	49	\$73,632	\$70,000
Assistant Winemaker	47	\$46,236	\$48,000
Cellar Master	30	\$42,199	\$41,000
Viticulturist/Vineyard Manager	37	\$51,463	\$51,000
Site Foreman	22	\$39,513	\$40,000
Labor Crew Supervisor	12	\$37,916	\$38,000

WINE INDUSTRY, HOURLY WAGE WORKERS, 2017.

Base Salary Reported	Total Reported	Low (per hour)	High (per hour)	Average Hourly Wage
Part-time Tasting Room	98	\$10.00	\$20.00	\$13.18
Cellar Hand/Interns	63	\$11.00	\$20.00	\$14.22
Tractor Operator (Skilled)	30	\$13.00	\$24.00	\$16.71
Tractor Operator (Unskilled)	13	\$10.00	\$16.00	\$13.87

**TASTING ROOM MANAGER SALARY
AVERAGE BY NUMBER OF CASES
PRODUCED, 2017.**

Total Cases Produced	Tasting Room Manager Average Salary	N
Fewer than 2500 Cases	\$37,694	7
2,501-5,000 Cases	\$41,828	9
5,001-10,000 Cases	\$36,000	8
10,001-20,000 Cases	\$40,373	13
20,000+ Cases	\$46,357	14
Total	\$41,219	51

**VITICULTURIST/VINEYARD MANAGER SALARY
AVERAGE BY NUMBER OF CASES PRODUCED,
2017.**

Total Cases Produced	Viticulturist/Vineyard Manager Average Salary	N
Fewer than 2500 Cases	\$48,333	6
2,501-5,000 Cases	\$49,428	7
5,001-10,000 Cases	\$48,400	5
10,001-20,000 Cases	\$56,250	4
20,000+ Cases	\$62,454	11
Total	\$54,242	33

**EXECUTIVE WINEMAKER AVERAGE BASE
SALARY BY TOTAL NUMBER OF CASES
PRODUCED, 2017.**

Total Cases Produced	Executive Winemaker Average Salary	N
Fewer than 2500 Cases	\$58,166	6
2,501-5,000 Cases	\$51,833	12
5,001-10,000 Cases	\$62,888	9
10,001-20,000 Cases	\$71,363	11
20,000+ Cases	\$107,450	15
Total	\$74,221	53

GENERAL MANAGER/PRESIDENT AVERAGE SALARY BY CASES PRODUCED, 2017.

Total Cases Produced	GM/President Average Salary	Total Respondents
Fewer than 2500 Cases	\$41,500	2
2,501-5,000 Cases	\$63,000	7
5,001-10,000 Cases	\$75,777	9
10,001-20,000 Cases	\$83,454	11
20,000+ Cases	\$133,416	12
Total	\$90,853	41

**NATIONAL SALES DIRECTOR, AVERAGE SALARY BY
CASES PRODUCED, 2017.**

Total Cases Produced	National Sales Director Average Salary	Total Respondents
2,501-5,000 Cases	\$78,333	3
5,001-10,000 Cases	\$58,200	5
10,001-20,000 Cases	\$73,888	9
20,000+ Cases	\$126,111	9
Total	\$89,461	26

WINERY/VINEYARD POSITION IN OREGON WINE INDUSTRY AND SEX/GENDER, 2017.

Position	Female	Male	Other	Total Respondents
President/General Manager	31 (41%)	45 (59%)	0 (0%)	96 (100%)
Director National Sales	16 (43%)	20 (54%)	1 (3%)	37 (100%)
Executive Winemaker	10 (16.5%)	50 (82%)	1 (1.5)	61 (100%)
Tasting Room Manager	68 (64%)	37 (35%)	1 (1%)	82 (100%)
Viticulturist/Vineyard Manager	10 (19%)	43 (81%)	0 (0%)	53 (100%)

SEX/GENDER, AVERAGE BASE SALARY, AND WINE PRODUCER OCCUPATION, 2017.

Position	Female (N)	Male (N)	Other (N)	Average (Total Respondents)
President/General Manager	\$96,499 (20)	\$88,793 (31)	0	\$91,815 (51)
Director National Sales	\$72,307 (13)	\$103,882 (17)	\$75,000 (1)	\$89,709 (31)
Executive Winemaker	\$69,285 (7)	\$75,298 (46)	\$75,000 (1)	\$74,513 (54)
Tasting Room Manager	\$39,652 (45)	\$45,150 (25)	\$32,000 (1)	\$41,480 (71)
Viticulturist/Vineyard Manager	\$64,375 (8)	\$49,843 (32)	0	\$52,750 (40)

DIRECT TO CONSUMER SALES POSITIONS BY AVA REGION, 2017.

Position	Willamette Valley	Southern Oregon	Columbia Valley	Mean Salary
Tasting Room Manager	\$41,950 (44)	\$40,250 (4)	\$29,680 (2)	\$41,323
Wine Club Manager	44,011 (4)	50,000 (1)	n/a	\$44,343
Special Events Manager	\$53,357 (7)	\$35,000 (1)	\$45,000 (1)	\$42,611
Consumer Sales Manager	\$54,078 (14)	n/a	n/a	\$54,078

SALES AND EXECUTIVE BY AVA REGION, 2017.

Position	Willamette Valley	Southern Oregon	Columbia Valley	Mean
Director/National Sales Director	\$90,960 (25)	\$61,000 (2)	n/a	\$88,740
Regional Sales Director	\$64,200 (15)	n/a	n/a	\$64,200
Marketing Director	\$80,781 (11)	n/a	n/a	\$80,781
Controller/Finance Director	\$76,745 (20)	\$85,000	n/a	\$77,319
Human Resources Director	\$69,062 (8)	n/a	n/a	\$69,062
General Manager/President	\$69,062 (8)	\$63,184 (5)	\$150,000 (1)	\$94,642

WINERY/VINEYARD POSITIONS BY AVA REGION, 2017.

Position	Willamette Valley	Southern Oregon	Columbia Valley	Mean
Viticulturist/Vineyard Manager	\$54,517 (29)	\$55,000 (2)	\$49,500 (2)	\$54,242
Site Foreman	\$38,804 (19)	\$41,000 (1)	n/a	\$38,914
Labor Crew Supervisor	\$42,333 (9)	n/a	n/a	\$42,333
Executive Winemaker	\$77,824 (47)	\$62,200 (5)	\$27,500 (2)	\$74,513
Assistant Wine Maker	\$47,392 (41)	\$44,500 (4)	\$12,000 (1)	\$46,371
Cellar Master	\$42,137	n/a	n/a	\$42,137

COST OF LIVING ADJUSTMENTS

- One of the questions people have about salaries, is how to compare them to either other studies, or to other regions.
- Wine Business Monthly is a difficult comparison. For example, in the WBM study, even using their subset of wineries with 50,000 cases or less, a National Sales Director makes \$184,775 on average, as compared to \$89,709 on average in Oregon. The problem is that almost 50 percent of our respondents produce under 5,000 cases, and over 80 percent produce 20,000 cases or less.
- One tool to use is a cost of living calculator, of which there are many. They vary on how far they drill down – you will notice that some show no difference between Portland and McMinnville, which we know to be different. These may be used to give a ballpark idea of what cost of living is, as you also look at averages/medians in Oregon.
- One cost of living indicator that does a pretty good job of drilling down to show more local differences is Sperling's.

AN EXAMPLE OF COST OF LIVING ADJUSTMENT

- The cost of living index of McMinnville is 116, if you set the average for the U.S. at 100. This means that it is a bit more expensive to live in McMinnville, than the U.S. average.
- The cost of living in Sonoma, CA, which is one of the places we've talked about is 194, which makes Sonoma 66.3% more expensive than McMinnville over all, and 33% more expensive than Portland.
- A person making \$125,000 in Sonoma, CA would have the same standard of living in McMinnville at roughly \$75,000, but someone moving from Sonoma up to Portland would need about \$94,500.
- [Sperling's Cost of Living Calculator](#)

SUMMARY AND CONCLUSIONS

- Reread the assumptions at the beginning of the presentation. This study gives some baseline information on averages and medians for the industry, but where the data are scarce, you need to use caution.
- Use this as one tool to determine where you wish to be paying, or what you decide you can pay.
- Cost of living calculators may also be helpful.
- Questions?