

OREGON WINE INDUSTRY LABOR SURVEY 2018

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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.
- In 2018 the second 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 148 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

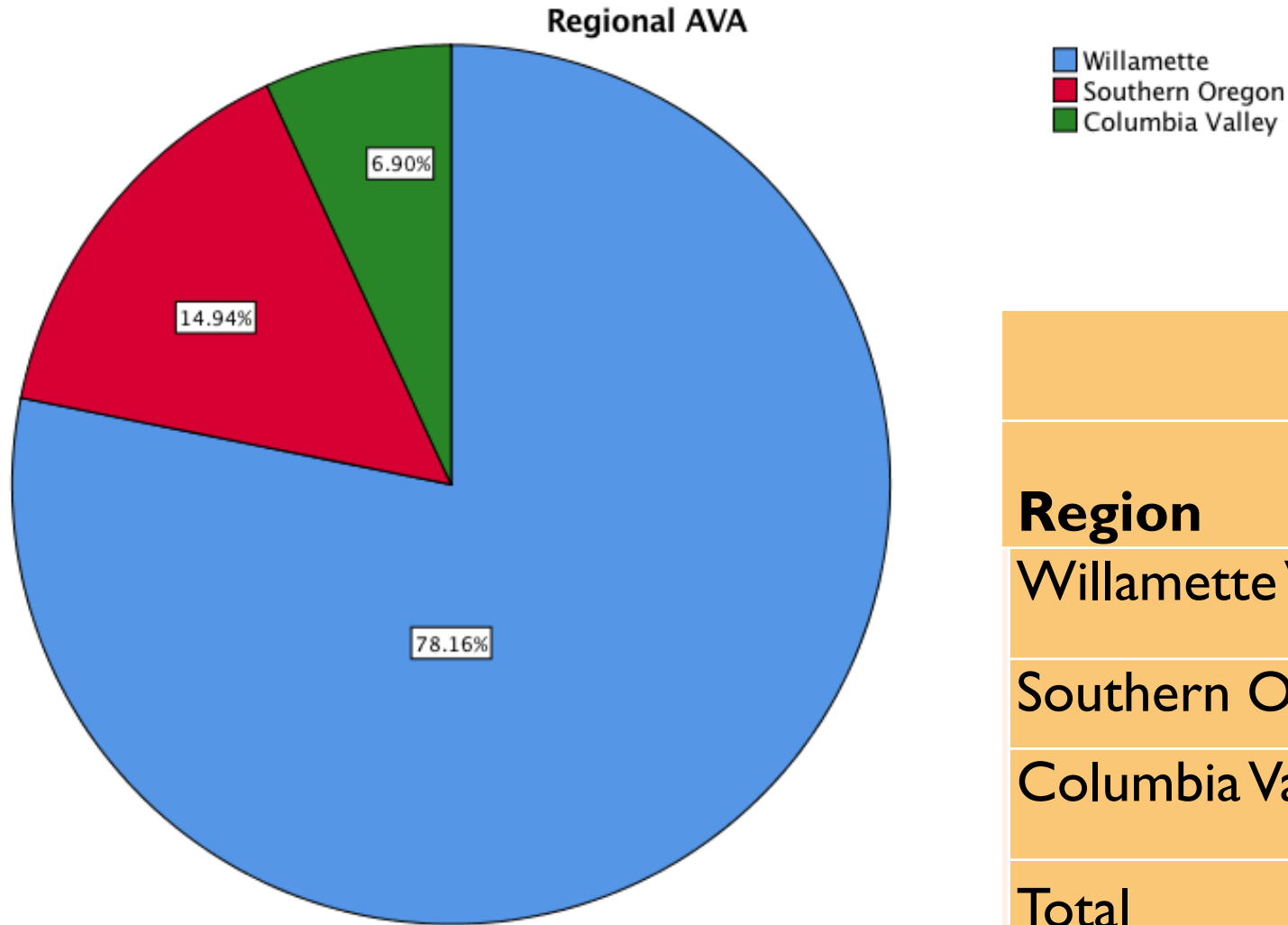
Types of Facilities of Producers, 2018.

Facility	Yes	No
Tasting Room	111	32
Winery	87	26
Vineyard	91	26

Oregon Total Cases Produced, 2018.

Total Number of Cases Produced	Frequency	Valid Percent
Fewer than 2500 Cases	23	27
2,501-5,000 Cases	21	24.7
5,001-10,000 Cases	15	17.7
10,0001-20,000 Cases	11	12.9
20,000+ Cases	15	17.7
Total	84	100.0

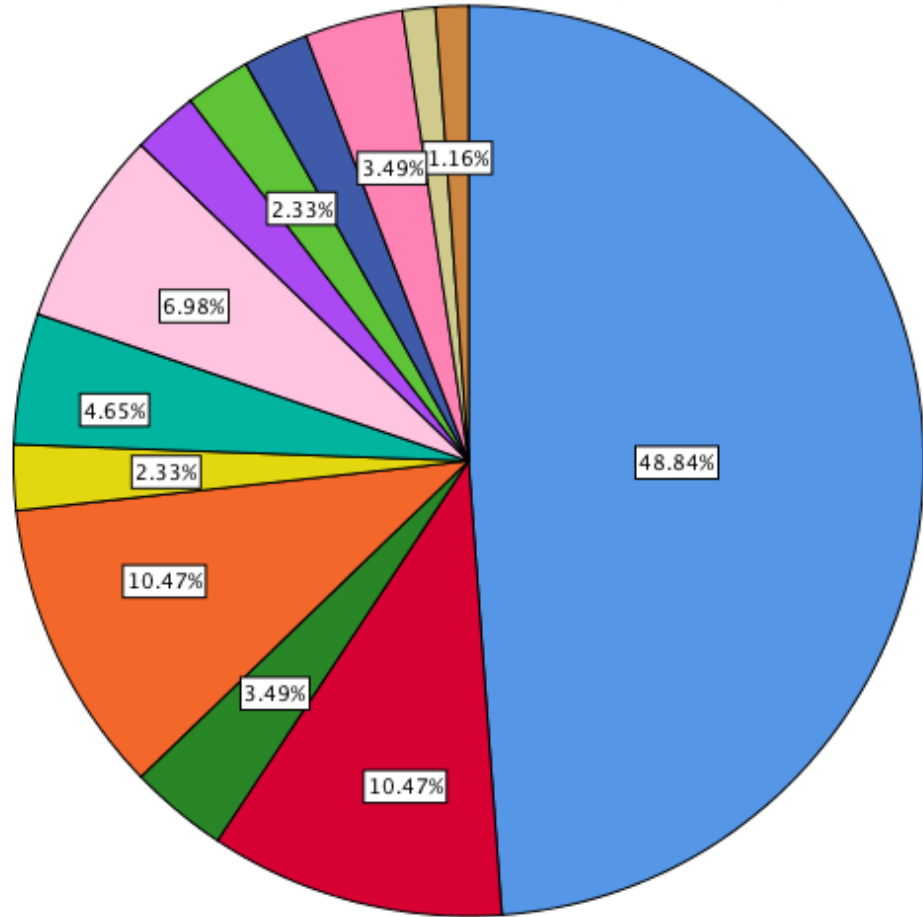
WINERY, OREGON AVA, 2018



AVA Region 2018.

Region	Frequency	Valid Percent
Willamette Valley	68	78.2
Southern Oregon	13	14.9
Columbia Valley	6	6.9
Total	90	100.0

VineyardCounty



- Yamhill
- Polk
- Marion
- Washington
- Clackamas
- Jackson
- Douglas
- Josephine
- Lane
- Hood River
- Umatilla
- Multnomah
- Wasco

VINEYARD COUNTY OREGON, 2018.

County	Frequency	Valid Percent
Yamhill	42	48.8
Polk	9	10.5
Marion	3	3.5
Washington	9	10.5
Clackamas	2	2.3
Jackson	4	4.7
Douglas	6	7.0
Josephine	2	2.3
Lane	2	2.3
Hood River	2	2.3
Umatilla	3	3.5
Multnomah	1	1.2
Wasco	1	1.2

Total	86	100.0
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EXECUTIVE AVERAGE SALARIES AND MEDIAN SALARIES, BY POSITION, 2018.

Base Salary Reported	Total Reported	Oregon Average Salary	Oregon Median Salary
GM or President	46	\$94,565	\$76,500
Director/Nat'l Director Sales	36	\$83,267 (WBM Oregon = \$75,505)	\$75,500
Director of Marketing	17	\$64,207	\$60,000
Controller/Director Finance	21	\$80,659	\$70,000
Regional Sales Director	16	\$71,916	\$66,000
Human Resources Director	10	\$79,787	\$66,900

TASTING ROOM. AVERAGE SALARIES AND MEDIAN SALARIES BY POSITION, 2018.

Base Salary Reported	Total Reported	Oregon Average Salary	Oregon Median Salary
Direct to Consumer Sales	4*	\$52,695	\$51,500
Wine Club Manager	24	\$44,016 (WBM Oregon – 45,422)	\$45,000
Tasting Room Manager	62	\$44,554 (WBM Oregon - \$43,863)	\$42,000
Special Events Manager	11	\$46,783	\$45,760
Tasting Room Staff	35	\$34,420	\$31,200

*Due to a formatting error in the survey, not all DTC positions were collected.

WINERY AND VINEYARD. AVERAGE SALARIES BY POSITION, 2018.

Base Salary Reported	Total Reported	Oregon Average Salary	Oregon Median Salary
Executive Winemaker	51	\$75,422 (WBM Oregon \$74,429)	\$75,000
Assistant Winemaker	39	\$51,513	\$50,000
Cellar Master	24	\$43,460	\$44,500
Viticulturist/Vineyard Manager	38	\$57,792 (WBM Oregon \$67,688)	\$57,500
Site Foreman	24	\$42,178	\$38,000
Labor Crew Supervisor	18	\$35,382	\$38,000

WINE INDUSTRY, HOURLY WAGE WORKERS, 2018.

Base Salary Reported	Total Reported	Low (per hour)	High (per hour)	Average Hourly Wage
Part-time Tasting Room	80	\$11.00	\$20.00	\$14.02
Cellar Hand/Interns	58	\$11.00	\$25.00	\$14.73
Tractor Operator (Skilled)	30	\$14.00	\$25.00	\$17.51
Tractor Operator (Unskilled)	14	\$12.00	\$19.00	\$14.61

**TASTING ROOM MANAGER SALARY
AVERAGE BY NUMBER OF CASES
PRODUCED, 2018.**

Total Cases Produced	Tasting Room Manager Average Salary	N
Fewer than 2500 Cases	\$33,437	10
2,501-5,000 Cases	\$40,520	10
5,001-10,000 Cases	\$53,666	6
10,001-20,000 Cases	\$46,349	10
20,000+ Cases	\$49,202	14
Total	\$44,278	50

**VITICULTURIST/VINEYARD MANAGER SALARY
AVERAGE BY NUMBER OF CASES PRODUCED,
2018.**

Total Cases Produced	Viticulturist/Vineyard Manager Average Salary	N
Fewer than 2500 Cases	\$17520	6
2,501-5,000 Cases	\$28,546	7
5,001-10,000 Cases	\$73,333	3
10,001-20,000 Cases	\$55833	6
20,000+ Cases	\$82,187	12
Total	\$60260	29

**EXECUTIVE WINEMAKER AVERAGE BASE
SALARY BY TOTAL NUMBER OF CASES
PRODUCED, 2018.**

Total Cases Produced	Executive Winemaker Average Salary	N
Fewer than 2500 Cases	\$28,020	6
2,501-5,000 Cases	\$61,833	12
5,001-10,000 Cases	\$74,777	9
10,001-20,000 Cases	\$71,483	9
20,000+ Cases	\$108,006	15
Total	\$75,422	51

GENERAL MANAGER/PRESIDENT AVERAGE SALARY BY CASES PRODUCED, 2018.

Total Cases Produced	GM/President Average Salary	Total Respondents
Fewer than 2500 Cases	\$42,142	7
2,501-5,000 Cases	\$69,800	5
5,001-10,000 Cases	\$54,125	8
10,001-20,000 Cases	\$104,166	6
20,000+ Cases	\$150,833	12
Total	\$92,421	38

**NATIONAL SALES DIRECTOR, AVERAGE SALARY BY
CASES PRODUCED, 2018.**

Total Cases Produced	National Sales Director Average Salary	Total Respondents
Less than 2,500	\$53,373	3
2,501-5,000 Cases	\$59,500	4
5,001-10,000 Cases	\$68,444	9
10,001-20,000 Cases	\$67,500	6
20,000+ Cases	\$129,555	9
Total	\$83,390	31

SEX/GENDER, AVERAGE BASE SALARY, AND WINE PRODUCER OCCUPATION, 2018.

Position	Female (N)	Male (N)	Average (Total Respondents)
President/General Manager	\$75,285 (14)	\$105,354 (31)	\$96,000 (51)
Director National Sales	\$61,470 (13)	\$95,586 (23)	\$83,267 (36)
Executive Winemaker	\$68,074 (15)	\$78,484 (36)	\$75,422 (51)
Tasting Room Manager	\$44,217 (40)	\$45,168 (22)	\$44,544 (62)
Viticulturist/Vineyard Manager	\$70,800 (5)	\$55,821 (33)	\$57,792 (38)

DIRECT TO CONSUMER SALES POSITIONS BY AVA REGION, 2018.

Position	Willamette Valley	Southern Oregon	Columbia Valley	Mean Salary
Tasting Room Manager	\$45,156 (37)	\$35,500 (5)	\$37,750 (4)	\$43,462 (46)
Wine Club Manager	48,992 (15)	35,000 (1)	28,000 (2)	\$45,882 (18)
Special Events Manager	\$48,982 (8)	0 (0)	0 (0)	\$48,982 (8)

SALES AND EXECUTIVE BY AVA REGION, 2018.

Position	Willamette Valley	Southern Oregon	Columbia Valley	Mean
Director/National Sales Director	\$91,916 (24)	\$60,000 (1)	56,875 (4)	\$85,982 (29)
Regional Sales Director	\$81,458 (12)	33,120 (2)	35,000 (1)	\$71,196 (14)
Marketing Director	\$72,043 (12)	45,000 (1)	50,000 (1)	\$68,537 (14)
Controller/Finance Director	\$88,506 (15)	\$40,000 (1)	41250 (1)	\$82,873 (17)
Human Resources Director	\$92,216 (6)	n/a	n/a	\$92,216 (6)
General Manager/President	\$113,481 (27)	\$65,333 (3)	\$68,750 (4)	\$103,970 (34)

WINERY/VINEYARD POSITIONS BY AVA REGION, 2018.

Position	Willamette Valley	Southern Oregon	Columbia Valley	Mean
Viticulturist/Vineyard Manager	\$61,751 (28)	\$30,345 (6)	\$71,250 (4)	\$57,792 (38)
Site Foreman	\$39,816 (19)	\$43,591 (3)	62,500 (2)	\$42,178 (24)
Labor Crew Supervisor	\$36,743 (16)	n/a	36,000 (1)	\$36,699 (17)
Executive Winemaker	\$84,595 (39)	\$60,675 (2)	\$31,666 (3)	\$79,899 (44)
Assistant Wine Maker	\$56,851 (27)	\$49,000 (1)	\$23,500 (2)	\$54,366 (30)
Cellar Master	\$46,643 (20)	21,100 (2)	n/a	\$44,320 (22)

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 \$120,000 on average, as compared to \$80,659 on average in Oregon. The problem is that almost over 50 percent of our respondents produce under 10,000 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?