

2022 OREGON WINE LABOR SURVEY

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OUTLINE

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



PURPOSE OF LABOR SURVEY

- **Supported by the Oregon Wine Board**
- **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, for the 2018 Report
- For the 2022 Report there were a total of 149 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 number of respondents vary.
- The data were “cleaned” after the survey was closed, which means that outliers that were clearly errors in responses, are removed. This includes reporting an hourly wage when a salary wage is requested, and vice versa.



NOTES ON INTERPRETING THE RESULTS

- This is not a random sample - organizations have to choose to respond. The assumption is that you will need to decide how to use the data. Given the extraordinary breadth and depth of production levels and types of organizations, for many, this may be aspirational – but it is important to have this data.
- 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.



FACILITIES AND CASES PRODUCED

Types of Facilities of Producers, 2022.

Facility	Yes	No
Tasting Room	116	33
Winery	67	27
Vineyard	83	16

Oregon Total Cases Produced, 2022.

Total Number of Cases Produced	Frequency	Valid Percent
2500 Cases and fewer	16	23.9
2,501-5,000 Cases	12	17.9
5,001-10,000 Cases	12	17.9
10,0001-20,000 Cases	10	14.9
20,000+ Cases	17	25.4
Total	67	100.0



Primary Vineyard AVA Region 2022.

Region	Frequency	Valid Percent	Vineyard County		
				Frequency	Valid Percent
Willamette Valley	59	89.4	Yamhill	33	51.6
Southern Oregon	5	7.6	Polk	10	15.6
Columbia Valley	2	3.0	Marion	5	7.8
Total	66	100.0	Washington	4	6.3
			Lane	3	4.7
			Jackson	2	3.1
			Douglas	2	3.1
			Multnomah	2	3.1
			Hood River	1	1.6
			Benton	1	1.6
			Wasco	1	1.6
			Total	64	100.1



EXECUTIVE AVERAGE SALARIES AND MEDIAN SALARIES, BY POSITION, 2018-22.

Base Salary Reported	2018 Average Salary	2019 Average Salary	2021 Average Salary	2022 Average Salary
GM or President	\$91,815 (51)	\$94,565 (46)	\$112,595 (32)	\$117,090 (51)
Director/Nat'l Director Sales	\$89,709 (31)	\$83,267 (36)	\$97,348 (26)	\$102,309 (24)
Director of Marketing	\$71,731 (15)	\$64,207 (17)	\$82,630 (11)	\$89,940 (15)
Controller/Director Finance	\$77,170 (23)	\$80,659 (21)	\$97,784 (18)	\$93,011 (23)
Regional Sales Director	\$64,875 (16)	\$71,916 (16)	\$85,050 (10)	\$99,958 (12)
Human Resources Director	\$66,250 (10)	\$79,787 (10)	\$71,544 (10)	\$101,350 (10)

TASTING ROOM. AVERAGE SALARIES AND MEDIAN SALARIES BY POSITION, 2018-2022.

Base Salary Reported	2018 Average Salary	2019 Average Salary	2021 Average Salary	2022 Average Salary
Direct to Consumer Sales	\$55,693 (16)	\$52,695 (7)	\$65,701 (11)	\$75,530 (25)
Wine Club Manager	\$44,382 (23)	\$44,016 (24)	\$47,014 (25)	\$52,475 (38)
Tasting Room Manager	\$41,376 (72)	\$44,554 (62)	\$50,101 (57)	\$51,435 (64)
Special Events Manager	\$42,500 (11)	\$46,783 (11)	\$46,793 (10)	\$56,010 (16)
Tasting Room Staff	\$28,762 (32)	\$34,420 (35)	\$30,678 (41)	\$34,710 (45)



WINERY AND VINEYARD. AVERAGE SALARIES BY POSITION, 2018-2022.

Base Salary Reported	2018 Average Salary	2019 Average Salary	2021 Average Salary	2022 Average Salary
Executive Winemaker	\$73,632	\$75,422 (510)	\$82,088 (44)	\$95,892 (42)
Assistant Winemaker	\$46,236	\$51,513 (39)	\$59,059 (32)	\$65,382 (34)
Cellar Master	\$42,199	\$43,460 (24)	\$48,207 (21)	\$49,117 (22)
Viticulturist/Vineyard Manager	\$51,463	\$57,792 (38)	\$70,210 (31)	\$67,223 (33)
Site Foreman	\$39,513	\$42,178 (24)	\$47,660 (23)	\$52,920 (21)
Labor Crew Supervisor	\$37,916	\$35,382 (18)	\$27,628 (16)	\$35,435 (15)



CASE PRODUCTION AND PAY

Oregon Total Cases Produced by Position 2022.

Total Number of Cases Produced	GM or President	Viticulturist	Wine-maker Salary	Tasting Rm Manager
2500 Cases and fewer	\$51,500 (4)	\$36,500 (2)	\$47,600 (5)	\$45,970 (10)
2,501-5,000 Cases	\$73,250 (4)	\$63,175 (4)	\$64,000 (4)	\$45,459 (7)
5,001-10,000 Cases	\$97,714 (7)	\$66,250 (4)	\$93806 (9)	\$48,611 (9)
10,0001-20,000 Cases	\$100,500 (8)	\$52,400 (8)	\$81644 (9)	\$48,071 (7)
20,000+ Cases	\$207,649 (14)	\$91,814 (11)	\$122,150 (16)	\$59,935 (15)
Total	37	39	43	48

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WINE INDUSTRY, HOURLY WAGE WORKERS, 2019-2022.

Hourly Wage Workers	Total Reported 2019	Average Hourly Wage 2019	Total Reported 2021	Average Hourly Wage 2021	Total Reported 2022	Average Hourly Wage 2022
Part-time Tasting Room	80	\$14.02 (11.00-20.00)	62	\$14.91 (12.00-24.00)	71	\$15.70 (12.00-24.00)
Cellar Hand/Interns	58	\$14.73 (11.00-25.00)	11	\$17.23 (12.00-35.00)	43	\$16.90 (13.00-25.00)
Tractor Operator (Skilled)	30	\$17.51 (14.00-25.00)	43	\$20.97 (15.00-45.00)	28	\$20.00 (17.00-28.60)
Tractor Operator (Unskilled)	14	\$14.61 (12.00-19.00)	14	\$15.77 (14.00-22.00)	12	\$17.10 (14.00-21.00)

SEX/GENDER, AVERAGE BASE SALARY, AND WINE PRODUCER OCCUPATION, 2019-2022.

Position	2019 Avg. Salary, Female	2019 Avg. Salary Male	2021 Avg. Salary, Female	2021 Avg. Salary Male	2022 Avg. Salary Female	2022 Avg. Salary Male	2022 Avg. Gender/Queer/ Non-binary
President/ General Manager	\$75,285 (14)	\$105,354 (31)	\$93,660 (13)	\$127,897 (16)	\$95,564 (17)	\$131,727 (33)	n/a
Director National Sales	\$61,470 (13)	\$95,586 (23)	\$63,683 (12)	\$134,066 (13)	\$78,438 (10)	\$119,361 (14)	n/a
Executive Winemaker	\$68,074 (15)	\$78,484 (36)	\$75,807 (13)	\$84,904 (29)	\$84,258 (10)	\$96,512 (30)	n/a
Tasting Room Manager	\$44,217 (40)	\$45,168 (22)	\$47,994 (37)	\$54,471 (19)	\$49,260 (39)	\$54,238 (23)	\$55,000 (1)
Viticulturist/ Vineyard Manager	\$70,800 (5)	\$55,821 (33)	\$89,143 (6)	\$65,666 (25)	\$83,314 (7)	\$62,890 (26)	n/a

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, in one year, National Sales Director made \$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

- For example, if 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.
- Final Note: Higher participation means levels mean better information!



QUESTIONS?

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