

The Red Cabinet

TRACKING WOMEN IN LEADERSHIP POSITIONS IN THE WINE INDUSTRY, PHASE I

Presented at Red Cabs Winter 2017 Program:
Succeeding as Women Leaders in the Wine Industry

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Our Goal

- Identify % of women in management in US wine industry: Cannot improve what you don't measure
- Management: Director and above
- Phase One: wineries (Top 30 + North Coast)
- Phase Two: expand to other West Coast regions + wholesalers/brokers/sales and marketing companies
- Then: we will see...

Approach

- Building spreadsheets identifying all management positions, who fills them — then identify % female
- Sources: requests directly to wineries/staff + LinkedIn + websites + personal contact
- With 5,000 wineries in California, most very small, will never reach all wineries but seeking solid representative sample of industry: start with North Coast and “Top 30”

What We Know Before Starting

- Few women in CEO positions -- although large numbers of women at entry and mid-level
- Fewer women in senior management in wholesale
- Anecdotal indicators of increasing number of women on customer facing side (restaurants and retail) — but actual share still low (e.g. of 149 MS, 24 are women) although increasing

Spreadsheet Info

- Categorize wineries by size (corporate, large, medium, small) and region/county
- Winery name
- Number employees
- Rank/role & functional area
- Gender
- Name

Red Cabinet Women in Wine Survey

** Director level and above, all functional areas

Company Name

Source:

(Marketing, Sales, DTC, IT, HR, Finance,
Logistics, Winemaking, Other) (F,M) (optional)

Title	Area	Sex	Name

Status So Far

- Just Beginning
- Started with larger companies, with confidentiality commitment
- Reviewed 300 positions in 9 companies, results presented in table on next slide
- **Of 23 C-level positions, 4 (21%) were held by women**

FINDINGS BY RANK/TITLE

TITLE/RANK	Female	Male	Total	% F
CEO	0	11	11	0%
CFO	2	5	7	29%
CMO	1	1	2	50%
COO	1	2	3	33%
GM	2	2	4	50%
VP/SVP	26	77	103	25%
DIRECTOR/SR DIRECTOR	72	92	164	44%
WINEMAKER	8	16	24	33%
GRAND TOTAL	112	206	318	35%

FINDINGS BY FUNCTION

FUNCTION	FEMALE	MALE	TOTAL	% F
CEO	0	11	11	0%
COO	1	2	3	33%
DTC	5	5	10	50%
FINANCE	14	26	40	35%
GM	1	5	6	17%
HR	17	5	22	77%
IT	1	6	7	14%
LEGAL	5	4	9	58%
MARKETING	45	28	74	62%
OPERATIONS	5	17	22	23%
OTHER	0	1	1	0%
SALES	9	76	85	11%
WINEMAKING	8	20	28	29%
GRAND TOTAL	112	206	318	35%

Questions to explore, beyond this research

- Is there a pipeline problem for potential CEOs? Are women in different types of jobs than men? (Line vs staff)
- Initially appears women more likely in marketing, sales (but mid-level sales not running large sales forces), PR, accounting (but possibly not CFO), increasing number as Counsel/General Counsel, increasing number as winemakers
- Fewer running operations/supply chain, top sales jobs (especially mid-size/larger wineries), vineyard management
- Are women EVP Marketing, Sales, Strategy?
- What roles did male CEOs have before general management?

What Does Pipeline Look Like?

- Strong numbers for winemaking/winegrowing pipeline: UC Davis reports that women have received 43% of Viticulture/Enology degrees for last decade
 - But few in vineyard management.
- Business/management side of wine industry more problematic. Why?
 - Are there issues with training and apprenticeship? Other constraints?
 - How are candidates recruited for these positions?

- Does pipeline, training, recruitment or advancement vary by:
 - Winery size or type?
 - Region?
 - Price segment?
 - Is interview process or experience different?

Entrepreneurship as an Alternative Career Path

- In many industries, women starting their own businesses provide alternative to women facing barriers in established companies
- To what extent is entrepreneurship an accessible alternative for women in the wine industry?
 - Access to capital and other resources?
 - Access to market?
 - Lifestyle issues?

Not Just About CEOs

- There is a lot we need to understand:
- Are there constraints, barriers or other factors affecting women's professional experience at all levels/segments in the industry?
- Are there specific things the industry can do to retain women, improve the environment and enhance their professional experience?
- It is not just about women.....

We Need Your Help

- Help us build a data base for a real fact based discussion
- Can you help complete a spreadsheet on your company?
 - Note: specific company information will NOT be shared; will only be seen by Insel & Goff
- Suggest other sources of information and recommend other companies to include
- Invite your colleagues, friends, management
- Suggest other issues and questions to explore

Thank you!

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