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# Letter from the Editor



**THE RESULTS ARE IN.** In SevenFifty's second annual Career & Salary Survey, we heard from more than 3,100 beverage professionals across all parts of the industry and all 50 states. One message was particularly clear: Work culture is evolving, with employees demanding more human-centered workplaces. That sentiment comes through in the rise of respondents who cited the importance of benefits like flextime to improve work-life balance, anti-harassment protocols to keep employees safe, and policies like pay transparency that can help level the playing field.

Unfortunately, we're not there yet. The industry still faces challenges around its lack of diversity and degree of gender inequality, including a persistent gender pay gap and fewer women—and especially women of color—in the highest paying, most senior roles. Yet, as several studies have shown, diversity and inclusion initiatives pay off. Companies in the top quartile for racial and ethnic diversity are 35% more likely to have financial returns above their respective national industry medians.<sup>1</sup> And some 83% of millennials are more actively engaged when they believe their company fosters an inclusive culture. It's worth noting that in a decade, millennials will comprise nearly 70% of the workforce.<sup>2</sup>

While trends are starting to emerge in this second annual report, we'll need a few more years of data to definitively track the industry's progress. But there are signs of movement in the year-over-year data we do have. Encouragingly, the gender pay gap shows some improvement and executives and workers are aligning on the importance of diversity initiatives and anti-harassment policies. So it appears that change is occurring, though will it happen soon enough? Companies must get serious about tackling the issues that are important to the workforce—or risk losing talent to other industries. SevenFifty will keep tracking these issues, and report back next year.

**Cheers,**

**Erica Duecy**

Editor in Chief, *SevenFifty Daily*



# Introduction

In a thriving—and evolving—industry that does about \$250 billion in sales annually, employment opportunities abound, with an estimated 4 million people working in the beverage alcohol trade across the U.S.<sup>3,4</sup> What is the state of this sizable industry in 2019? We asked over **3,100 beverage alcohol professionals** a series of questions to find out. Their responses helped us create the most in-depth look at workplace trends for trade professionals across the industry.

## OUR METHODOLOGY

In July and August 2019, **SevenFifty** and **SevenFifty Daily** partnered with **Wine Opinions**, the leading U.S. wine market research company, to conduct a follow-up study to our 2018 survey and report. We wanted to get a better understanding of the opportunities and challenges workers face across all tiers.

Our online survey asked questions about participants' industry tier, role, location, education, experience, career satisfaction, and current stress level, among other things.

We sought to determine:

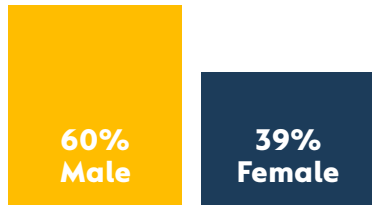
1. How salaries compare for individual roles across each tier of the beverage alcohol industry.
2. How much opportunity exists for pay growth and career advancement.
3. How satisfied industry professionals are with their careers and individual roles.
4. The top workplace policies, trends, and learning resources making an impact.

**We wanted to hear about the issues that matter most, from pay rates to career satisfaction.**



# Who Answered Our Call?

**More than 3,100 trade professionals from across the beverage alcohol industry.**



**13**  
Average years in industry

**41**  
Average age

**84%**  
Caucasian/White

## GEOGRAPHY

**All 50 states** and Washington, D.C., with the majority from NY, CA, TX, FL, GA, MA, CO, and IL.

## PARTICIPANTS BY TRADE TIER



\*\*Other\* company types may include consulting, marketing, and public relations.

## SALARY SNAPSHOT

**\$76K**

Average annual compensation across all survey respondents\*\*

**\$100K+**

18% earn above three figures

**45%**

Receive raises at least once per year

**21%**

Receive income from tips

**49%**

Receive income from bonuses/incentives

\*\*Survey respondent salaries may skew high because of seniority level or location, or due to a larger proportion of big companies in the distributor tier.



# A Closer Look by Industry Tier

## Wine, Beer, and Spirits Producers

**12%** of our survey pool

**21%** 5+ years in current position

### Most Common Roles

**22%** Marketing or sales management

**19%** Owner, CEO, or general manager, or senior management

**19%** Production/operations

**13%** Tasting room/events or direct-to-consumer

**\$92K\*** Average annual compensation

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Though the producer tier makes up the smallest group of our respondents, their work is at the heart of the industry. The large number of workers holding sales and marketing positions—jobs with a higher-than-average turnover rate—may contribute to the fact that 79% of producer respondents have been in their current positions for less than five years.

## Importers and Distributors

**21%** of our survey pool

**35%** 5+ years in current position

### Most Common Roles

**45%** Sales representative

**17%** Marketing or sales management

**13%** Owner, CEO, or general manager, or senior management

**13%** Regional or district manager

**\$93K\*** Average annual compensation

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Some distributors have import licenses, and that likely contributes to the fact that about 6% of all respondents work for companies that both import and distribute. Despite reporting the highest average annual compensation, only 15% from this group are “very satisfied” with their current level of pay, perhaps due to pressure to meet performance goals in an increasingly competitive marketplace.

\*Average annual compensation may include wages, tips, bonuses, commission, etc. Survey respondent salaries may skew high because of seniority level or location, or due to a larger proportion of big companies in the distributor tier.



# A Closer Look by Industry Tier (CONTINUED)

## On-Premise: Workers at Restaurants and Bars

**44%** of our survey pool  
**25%** 5+ years in current position

### Most Common Roles

**38%** Beverage/wine director, manager, or buyer  
**29%** Owner, CEO, or general manager, or senior management  
**19%** Sommelier  
**13%** Bar manager

**\$70K\*** Average annual compensation

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This group represents the most significant percentage of our total respondents, and it's the tier that reports the highest number of workers in their '20s (about 20%). About half (51%) of on-premise respondents work for independent restaurants, and more than one-third of workers from on-premise venues say their annual compensation includes tips.

## Off-Premise: Workers at Beer, Wine, and Liquor Stores

**19%** of our survey pool  
**43%** 5+ years in current position

### Most Common Roles

**35%** Beverage/wine director, manager, or buyer  
**27%** Owner, CEO, or general manager, or senior management  
**17%** Sales staff or customer service  
**17%** Store manager assistant manager

**\$58K\*** Average annual compensation

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The majority of off-premise respondents (64%) work for independent liquor/wine/beer stores and this tier reports the highest number of workers aged 60 and older (18%). While this tier continues to face increasing competition from all angles, respondents from this group report the lowest stress levels. Lower annual compensation may be due to more part-time work in this retail tier.

\*Average annual compensation may include wages, tips, bonuses, commission, etc. Survey respondent salaries may skew high because of seniority level or location, or due to a larger proportion of big companies in the distributor tier.



# The Top Ten Takeaways

- #1** *Gender Pay Gap Persists, with Signs of Improvement*
- #2** *Majority of Respondents—But Not All—Satisfied with Compensation*
- #3** *Positive Outlook for Career Growth, Except for Off-Premise*
- #4** *Healthcare Benefits Valued Most, with Flextime in Demand*
- #5** *Execs Risk Being Out of Touch on Some Workplace Policies*
- #6** *Millennial Majority: Young, Educated, and Optimistic Respondents*
- #7** *Addressing Workplace Bias is Important to Young Workers*
- #8** *Interest in Industry Certifications on the Rise*
- #9** *Most-Valued Resources: Online Publications, Tasting Events, and Producer Visits*
- #10** *What Matters in 2020? Cannabis, Climate Change, and Packaging*

**Now, let's dive in to the 2019 insights. ▶▶**





# Gender Pay Gap Persists, with Signs of Improvement



**HOW DO WOMEN'S SALARIES STACK UP?** This year's survey results confirmed what we learned last year: The pay gap is real. Men working in the drinks industry still make significantly more per year than women—a whopping \$12,000 more in 2019. And women in our survey earned about 85 cents for every dollar earned by a man in 2019, according to respondents.

But there's good news to report. Though the gap has not drastically changed, it did improve slightly from our 2018 to 2019 data, by 1.7%. Another encouraging sign toward narrowing the gap is that female respondents surpassed males

in gains (a 4.6% compensation increase for women and 2.5% for men), which mirrors national trends.<sup>5</sup>

According to the Institute for Women's Policy Research, women earn 81.6 cents for every dollar earned by a man, representing a national wage gap of 18.4%—a number that can be amplified by factors such as ethnicity.<sup>6</sup> Salary is never the full story when it comes to pay inequality, but this year's survey results provide a snapshot of the industry at a key moment in time, when public debate is heating up and companies are under pressure to take a stand against the cycle of low pay for women.

## THE PAY GAP *Women earned on average \$12,000 less than men*

**14.8%**  
pay gap  
▼1.7%

**85¢ to \$1.00**

Average Annual Compensation



Satisfied with Compensation



Career Outlook: Excellent/Very Good



CEO/CFO/Senior Management Positions\*



\* Due to covariance, additional analysis would be needed to discover if women are underpaid for the same jobs as men.



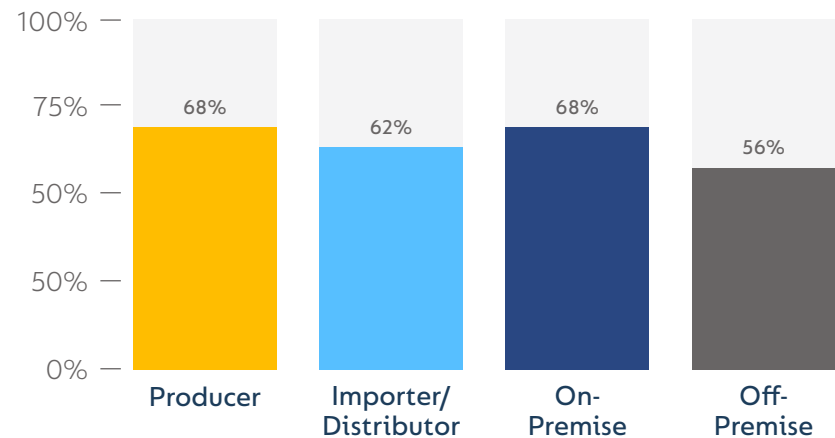
# Majority of Respondents—But Not All—Satisfied with Compensation

## WHO IS MOST SATISFIED WITH THEIR PAY?

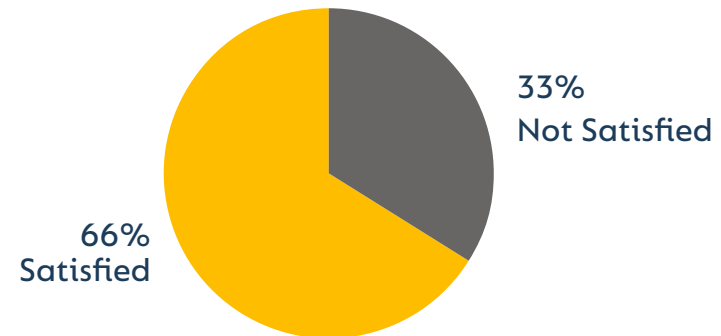
As in 2018, a majority of respondents across the industry are satisfied with their compensation this year, and those who have worked in the industry the longest are the most satisfied. Respondents who are “somewhat or very satisfied” with their pay outnumber those who are “not very or not at all satisfied.”

Overall pay satisfaction is highest among the producer and on-premise respondents and lowest in the off-premise tier, which showed a significant decline in pay satisfaction compared to 2018 survey responses. Some 41% of off-premise respondents report being unsatisfied with their pay this year, compared to 32% last year. CEOs/CFOs/senior managers are somewhat more likely to be very satisfied with their pay than those in other roles, as are male respondents in comparison to female respondents.

## Overall Satisfaction with Compensation by Trade Tier



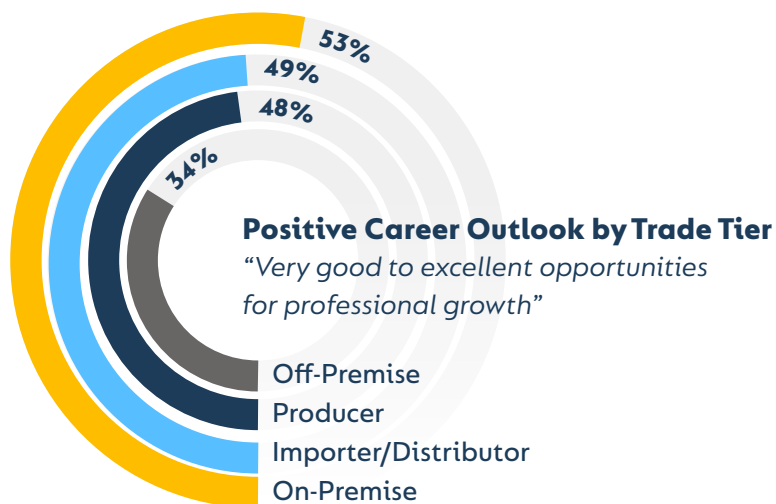
## Compensation Satisfaction Among Total Participants



# Positive Outlook for Career Growth, Except for Off-Premise

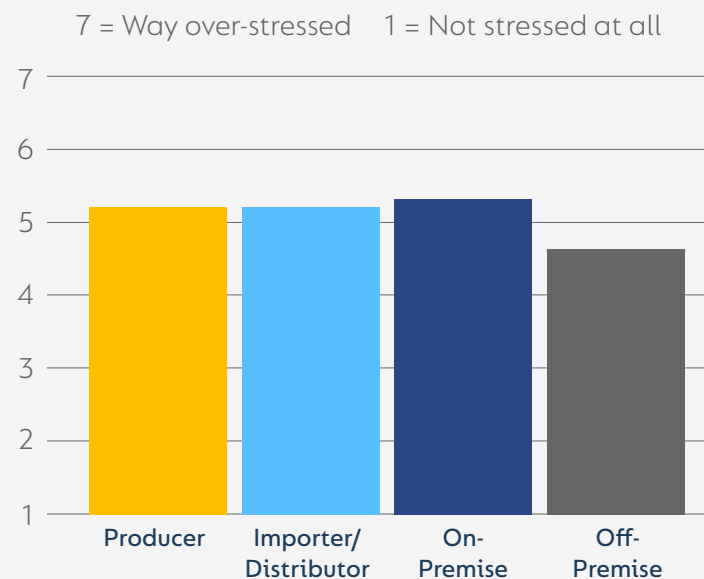
## THE GLASS IS HALF FULL FOR MANY DRINKS PROFESSIONALS.

Many respondents saw positive opportunities for professional growth in their tier of the trade, with nearly half rating prospects as “very good to excellent.” Who is most optimistic about their career? On-premise workers were the most positive, along with respondents in their '20s and those in CEO/CFO/senior management roles. Meanwhile, off-premise workers rated their opportunities the lowest, with only one-third reporting their career prospects as above average.



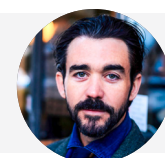
## Work-related Stress Levels

We asked participants to rate their stress on a scale of 1 to 7, to better understand to what extent work demands are taking a toll. We learned that work-related stress skews high.



*“Restaurants and bars are still incredibly interactive, creative, and social environments. While interacting with the public can be stressful at times, hospitality work is also intrinsically rewarding for the people drawn to it.”*

— **Aaron Gregory Smith, Executive Director, United States Bartenders’ Guild**



# Healthcare Benefits Valued Most, with Flextime in Demand

## The Most Important Workplace Policies

### Healthcare Benefits Top of Mind for All

Unsurprisingly, healthcare benefits were cited as important by an overwhelming majority across all tiers. Healthcare is typically one of the most expensive benefits for employers to provide, constituting 8% of total compensation for workers, with benefit costs projected to rise by 4% per employee in 2020.<sup>7,8</sup> Sick leave benefits also rated highly this year, with nearly two-thirds of respondents citing them as important. Of note is that our 2018 survey revealed that about two-thirds of respondents' companies covered all or part of their healthcare premium, though the remaining one-third were not offered insurance coverage.



**84%** CITED HEALTHCARE BENEFITS AS IMPORTANT

### Is Flextime Becoming the Norm?

Recent studies show that flexible hours and related perks are emerging as prized benefits—a trend that's true across generations as employees of all ages seek out a better work-life balance.<sup>9,10</sup> In our survey, those in the producer tier cited flextime as important more frequently than others, and women cited it more often than men. Access to flexible work schedules varies depending on job titles, with the U.S. Bureau of Labor reporting between 11% and 27% of the national workforce having access in 2019.<sup>11</sup> Flexible arrangements and work-life balance have various meanings, but “agile” working practices could bring low-cost benefits to business, from attracting talent to retaining staff.<sup>12</sup>



**71%** CITED FLEXIBLE WORK ARRANGEMENTS AS IMPORTANT

### Supporting a Safe Environment for Everyone

A workplace that supports safety and respect has become a top priority for many in the industry, with respondents across tiers citing anti-harassment policies as important—more so than sick leave, parental leave, pay transparency, and diversity initiatives. On-premise respondents rated anti-harassment policies as important more frequently than other tiers, and women cited them slightly more than men. In the #MeToo era, it's clear that work culture is changing and our survey results confirm that this issue remains in the spotlight, with employees expecting more from employers when it comes to identifying and preventing problematic behavior while encouraging a positive workplace for all.



**65%** CITED ANTI-HARASSMENT POLICIES AS IMPORTANT

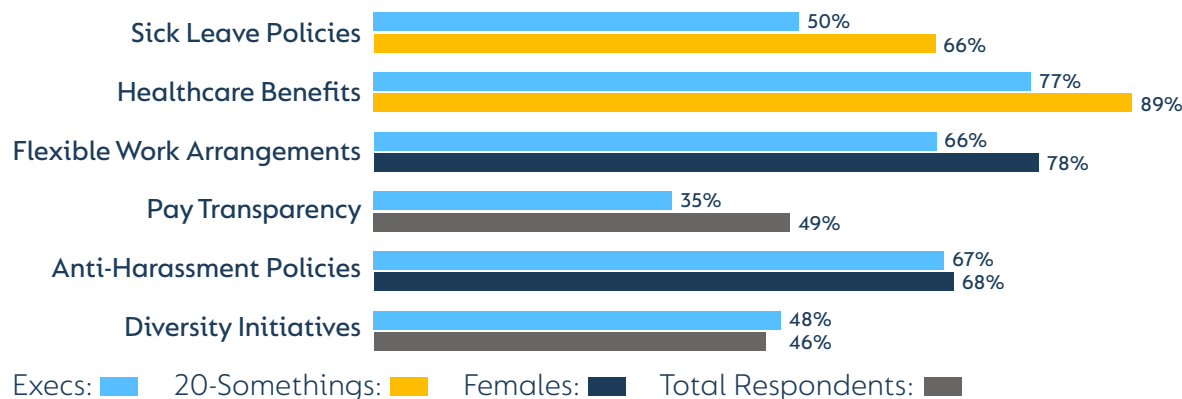


# Execs Risk Being Out of Touch on Some Workplace Policies

## IS A GREATER LEVEL OF AWARENESS NEEDED?

From a leadership perspective, executives are contending with multiple forces reshaping the market, from changing employee expectations to intensifying disruptions of traditional commerce channels.<sup>15</sup> Our survey showed that they also could be facing misalignment on some workplace policies. It's important to note that of the CEO/CFO/senior managers surveyed, 84% are Caucasian/white (which is in line with our survey respondent breakdown), and 66% male, which skews higher than our survey breakdown of 60% male. Diversity and anti-harassment policies were, however, comparably cited between executive and non-executive respondents, except among respondents in their '20s, where more workers consistently rated these issues as more important.

### Comparing Importance of Workplace Policies



## Minimum Wage: Top of Mind

How do organizations balance higher wages against slimmer profit margins? It's an issue of growing importance to the executive management respondents, according to our survey results.

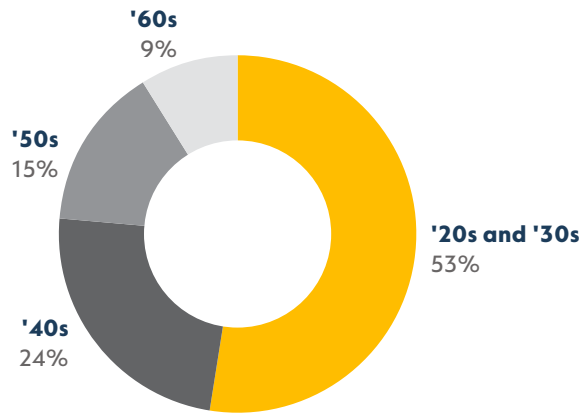
The current federal minimum wage is \$7.25 per hour and hasn't been adjusted since 2009, though many states have since set their minimum wage higher and some have plans to increase it.<sup>13</sup> So, it may come as no surprise that this issue rated as one that will continue to heat up into 2020, with over three-fourths of CEOs/CFOs/senior managers citing the issue as important.<sup>14</sup>

"Companies that are doing the work to learn about employee interests—and are also seeking solutions—do well in retaining talent." —**Michelle Korsmo, President and CEO, Wine & Spirits Wholesalers of America**

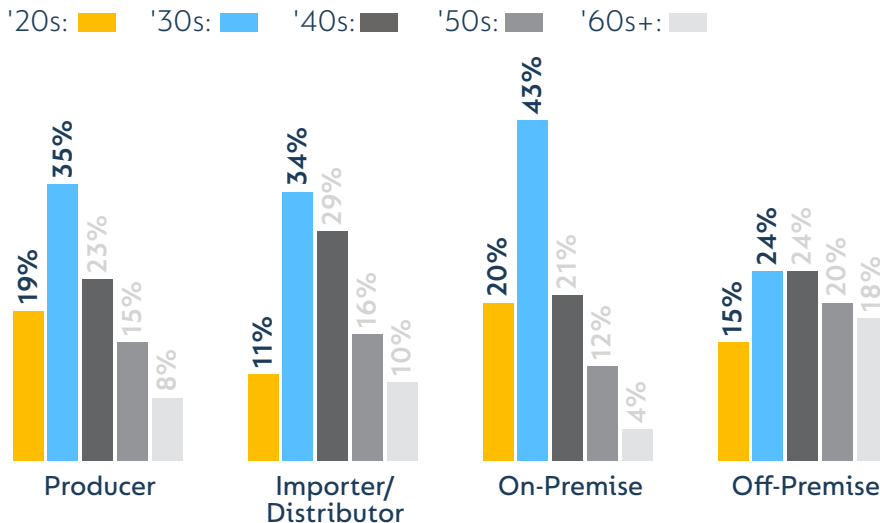


# The Millennial Majority: Young, Educated, and Optimistic Respondents

**Age Across Industry\***



**Age by Trade Tier\***



## THE TRUTH ABOUT MILLENNIALS

The Millennial generation—those aged 23 to 38 in 2019—is a growing demographic force in the beverage alcohol industry.<sup>16</sup> Over half of survey respondents across the industry are in their '20s and '30s, and of those workers, about half report their career opportunities for professional growth as "very good to excellent." This age group has the highest combined representation in the on-premise tier (63% combined), and lowest in the off-premise tier (39% combined). Many 20- and 30-somethings hold WSET (51% of those in '20s and 41% of those in '30s) and/or CMS certification (47% of those in '20s and 46% for those in '30s). Roughly half—59% of 20-somethings, compared to 49% of 30-somethings—have a bachelor's degree or higher.

**What can employers expect for 2020 and beyond when it comes to younger workers?** For one, an added emphasis on training and education. The rising Generation Z, now coming into drinking age, is slated to be the most racially and ethnically diverse and best-educated generation yet, indicating that in order to continue recruiting top talent employers will need to pay close attention to the ever-evolving interests of the future workforce.<sup>17</sup>

\*Numbers may not add to 100% due to rounding.



# Addressing Workplace Bias is Important to Young Workers

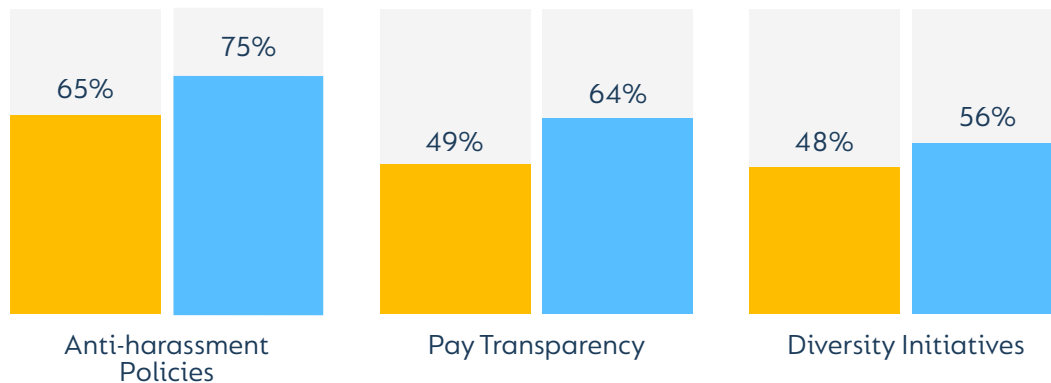
## DO WORKPLACE POLICIES NEED TO SHIFT?

Sensitive topics that address bias in the workplace—such as pay transparency and anti-harassment—rated highest among 20-somethings.

Young workers may be more comfortable talking about these so-called uncomfortable truths, and may also be more likely to work on-premise at bars and restaurants, where the issue of anti-harassment policies, in particular, has been in the spotlight.<sup>18,19</sup> In our survey, this age demographic rated anti-harassment policies, pay transparency, and diversity initiatives significantly higher in importance than other groups, an indication to employers that advancing policies in these specific areas could be important to attracting and retaining staff in 2020 and beyond.

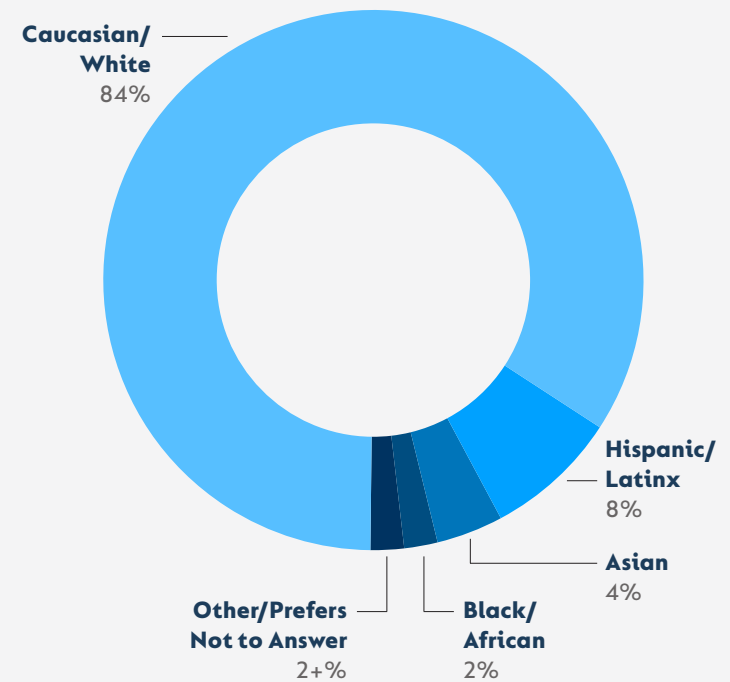
### Importance of Workplace Policies

Total Respondents: ■ Those Aged 21-29: ■



## Examining Race and Ethnicity

Our survey revealed that communities of color are notably underrepresented in the three-tier system, with 84% of respondents self-identifying as Caucasian/white, compared to 78% nationally.<sup>20</sup>



\*Percentages may exceed 100% due to selection of multiple answers.



# Interest in Industry Certifications on the Rise

## CERTIFICATIONS ABOUND IN OUR INDUSTRY.

That was a key finding from our 2018 Career & Salary Survey. In 2019, we learned that respondents continue to seek out programs that can help establish their professional standing in the drinks industry.

Wine & Spirit Education Trust (WSET) certifications are the prevalent industry education credentials among all respondents, as in 2018, having grown from 23% of respondents citing this program in 2018 to 25% in 2019. Court of Master Sommeliers (CMS) certifications are almost as popular, though the two programs attract different segments of the industry. Importers/distributors and off-premise respondents preferred certification with WSET, while on-premise respondents

preferred CMS certifications. Hard-to-earn titles like Master of Wine and Master Sommelier, as expected, were cited by very few respondents.

Though only 6% of respondents indicated Cicerone beer certification this year, the relatively low percentage could point to the maturity of each market and program, given that Cicerone was founded in 2008 while WSET has been offered in North America since 1977. Beverage professionals hungry for new educational opportunities can expect to see even more robust options emerge, such as Cicerone's recent addition of an American Beer Styles course to its certification series and WSET's new Level 3 Award in Spirits.<sup>21</sup>

## INDUSTRY-SPECIFIC EDUCATION

Among Total Respondents

**25%** Wine & Spirit Education Trust (WSET), any certification

**23%** Court of Master Sommeliers (CMS), any certification

**8%** Society of Wine Educators, Certified Specialist of Wine (CSW)

**6%** Cicerone, any certification

**<1%** The Institute of Masters of Wine, Master of Wine (MW)

**<1%** Court of Master Sommeliers, Master Sommelier (MS)

*"Where we are expecting robust growth over the next few years is from large off-premise companies that are looking at demographic shifts, and the importance of education and training to millennials and Gen Zs."*

—**Dave Rudman, Executive Director, WSET Americas**





# Most-Valued Resources: Online Publications, Tasting Events, and Producer Visits

## TOP 5 LEARNING RESOURCES ACROSS INDUSTRY

### 82% ONLINE PUBLICATIONS

Rated highest among producer tier

### 70% TRADE TASTING EVENTS AND SEMINARS

Rated highest among off-premise

### 67% VISITS TO PRODUCERS

Rated highest among producer and importer/distributor tiers

### 61% BOOKS

Rated highest among off-premise, and those in their '20s and '30s

### 49% PRINT PUBLICATIONS

Rated highest among off-premise, and those aged 60+

## DRINK PROFESSIONALS LOVE TO LEARN.

It may even be what attracted them to the field, or what enticed them to stay. Whether it's for personal or career reasons, it seems that learning new skills, staying on top of industry trends, meeting new people, and keeping up with the daunting amount of brand and product information that's out there is just part of the job.

When respondents were asked which learning resources they rely on most for professional development, the results were astoundingly clear, and in some cases surprising. Online publications rated highest overall, with 82% of all respondents indicating that web-based publications were their preferred resource. That number jumps to 88% within the producer tier. Over two-thirds of all respondents also highly rated trade tasting events/seminars and visits to producers. Books also rated well, with three out of five respondents citing them as important resources. Surprisingly, books rated highest with younger respondents, and lowest with older respondents, with 70% of those in their '20s citing them as an important resource, compared to just 55% of those aged 60 and older. This could be an indication that the 20-something “digital native” demographic does in fact appreciate the depth of knowledge a good book can impart.

*"Experiencing the terroir, the people, the culture, the food, and the families at our producers' wineries is a huge part of understanding and experiencing the wine."* — **Adam Sager, Co-President, Winesellers, Ltd.**

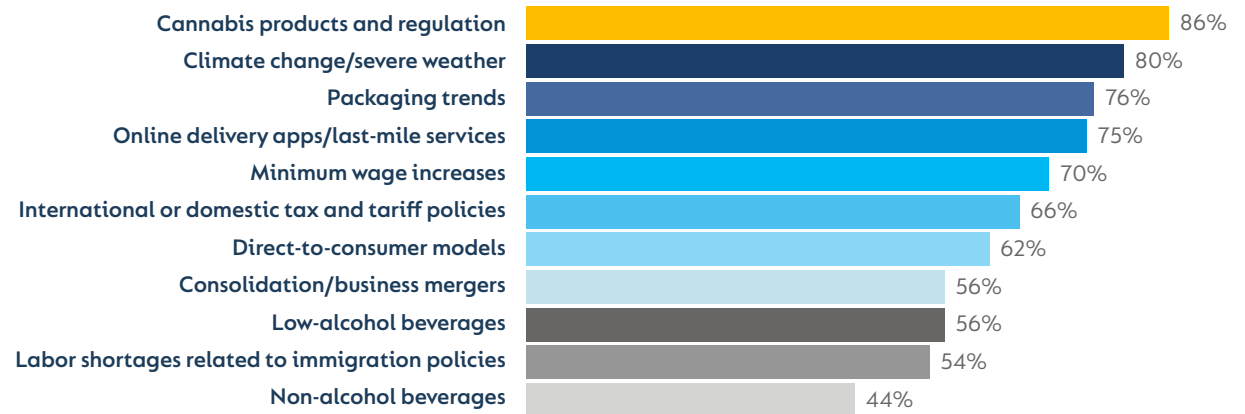


# What Matters in 2020? Cannabis, Climate Change, and Packaging

## WHICH TRENDS ARE IMPACTING THE INDUSTRY MOST?

According to respondents, it's all about cannabis. A vast majority of respondents across tiers indicated that marijuana products and regulation will grow in importance over the next year.<sup>22</sup> The jury is still out on how the legal cannabis industry will affect the alcohol trade—whether it brings new opportunities or growing competition. In any case, it's proving to be the trend to watch in 2020, along with climate change, alternative packaging like cans and cartons, and online delivery apps/last-mile services.

## Trends That Will Grow in Importance over the Next Year



## THE PRODUCER PERSPECTIVE

More respondents from the producer tier cited these four trends as important, in comparison to other industry tiers.

**91%**  
Cannabis products and regulations

**84%**  
Packaging trends

**81%**  
Direct-to-consumer models

**64%**  
Labor shortages related to immigration policies

"Craft brewers are definitely paying attention to cannabis. We surveyed our entire membership—thousands of breweries—and nearly half said they'd entertain making beers that contain CBD or THC. That's a very powerful statistic." —**Julia Herz, Craft Beer Program Director, Brewers Association**



# Summary

## TLDR: THE MODERN WORKPLACE IS EVOLVING

This year's report provides a snapshot of the beverage alcohol industry at a key juncture, when work culture is changing at bars, restaurants, retail shops, production facilities, and offices across the country, and many companies are already taking action to address issues surrounding diversity, inclusion, and wellness in the workplace.

At a time when the unemployment rate (3.5%) is at a five-decade low, the industry continues to grow, offer opportunities for career advancement, and attract an overall enthusiastic workforce.<sup>23</sup> The majority of our survey respondents appear to be enjoying the current industry climate, though some workers, notably those in the off-premise tier, see less opportunity for career growth. Many report feeling stressed at work, but there's overall satisfaction with current pay levels and career trajectories.

We found that progress is being made on some fronts since we last surveyed the industry in 2018: The gender pay gap appears to be improving and anti-harassment policies are front-and-center this year. But is it enough? Our survey analysis once again reflects a lack of diversity in the industry, and lack of inclusion of women in senior roles continues. We also revealed to what extent the millennial presence is impacting work culture and placing new expectations on employers and executives, though companies would be wise to capitalize on the fast-growing workforce segment of aging workers who continue to work into their retirement years.<sup>24</sup> Among the new wave of business and HR challenges identified are a slew of hot topics that are top of mind across all tiers, from cannabis, to climate change, to the desire for more flexible work arrangements, according to this year's survey.

## MAKING A POSITIVE IMPACT

**How can you lead change in the industry?** Take the time to understand the trends shaping your workplace—and find out what matters most to both employers and employees so you can support leaders in setting priorities. Start by asking critical questions of your organization:

1. Do our policies and actions reflect fairness and respect for all workers?
2. How can we encourage candidates from more diverse backgrounds to work with us?
3. What is our philosophy for hiring and developing leaders within the company?
4. How do we share our expectations and ideas with the leadership?
5. What are the values and insights that inform our company roadmap?
6. What challenges are in store for 2020 that we can work on together?



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# About Us



## SevenFifty

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**SevenFifty** powers a connected beverage alcohol supply chain, bringing innovative technology to the massive but antiquated wholesale alcohol sales and distribution industry. A first-of-its-kind communication platform and marketplace, SevenFifty helps producers, importers, distributors, and retail buyers connect with each other and do business in the modern world. Founded by industry professionals in 2012, SevenFifty now operates in 50 U.S. markets.

## SevenFiftyDaily

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**SevenFifty Daily** is an online magazine owned and published by SevenFifty that focuses on the business and culture of the beverage alcohol industry. The publication analyzes the issues people are talking about, uncovers new insights and innovations, and explores the people, places, and traditions beyond the bottle. Covering the three tiers of the alcohol industry, *SevenFifty Daily* connects a global community of drinks professionals, creating a forum for conversation and a platform for showcasing the people and ideas moving the industry forward.

## “ Wine Opinions ”

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**Wine Opinions** is the leading provider of U.S. wine market research to wineries, wine-marketing companies, and wine trade associations around the globe, offering unparalleled trade and wine-consumer insights and wine-market intelligence. Capabilities and services include quantitative surveys of U.S. wine consumers and the wine trade; qualitative research, including online and in-person focus groups and moderated wine tastings; baseline and tracking studies; and studies of consumer and trade trends and market data.

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Questions about the insights in this year's survey report?  
Contact [editor@sevenfifty.com](mailto:editor@sevenfifty.com).

Interested in how to leverage SevenFifty for your business?  
Contact [sales@sevenfifty.com](mailto:sales@sevenfifty.com).

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