

WINE INDUSTRY  
**Financial**  
SYMPOSIUM

November 16 & 17, 2022

CIA @ Copia, Napa

**INSIGHTS FROM THE  
C-SUITE:  
TRENDS, SOLUTIONS &  
STRATEGIES**

**SONOMA  
STATE  
UNIVERSITY**

WINE  
BUSINESS  
INSTITUTE

**25**  
YEARS

# Today's Panel:

Moderated by leaders of the  
Wine Business Institute at  
Sonoma State University



**Emily Porter**  
Business  
Operations  
Manager



**Ray Johnson**  
Executive Director

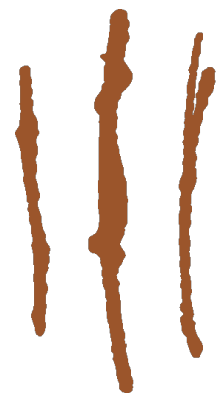


**Prema Behan**  
Co-Founder & General

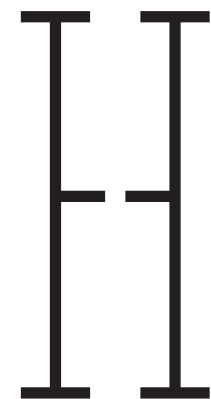


**Dana Sexton Vivier**  
Chief Financial Officer





**THREE STICKS**



**HEAD HIGH**



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**Dana Sexton Vivier**  
Chief Financial Officer



THE NAPA VALLEY WINE ESTATE  
ESTABLISHED 1885





# WBI Board Member Organizations



E. & J. Gallo Winery



SILVER OAK



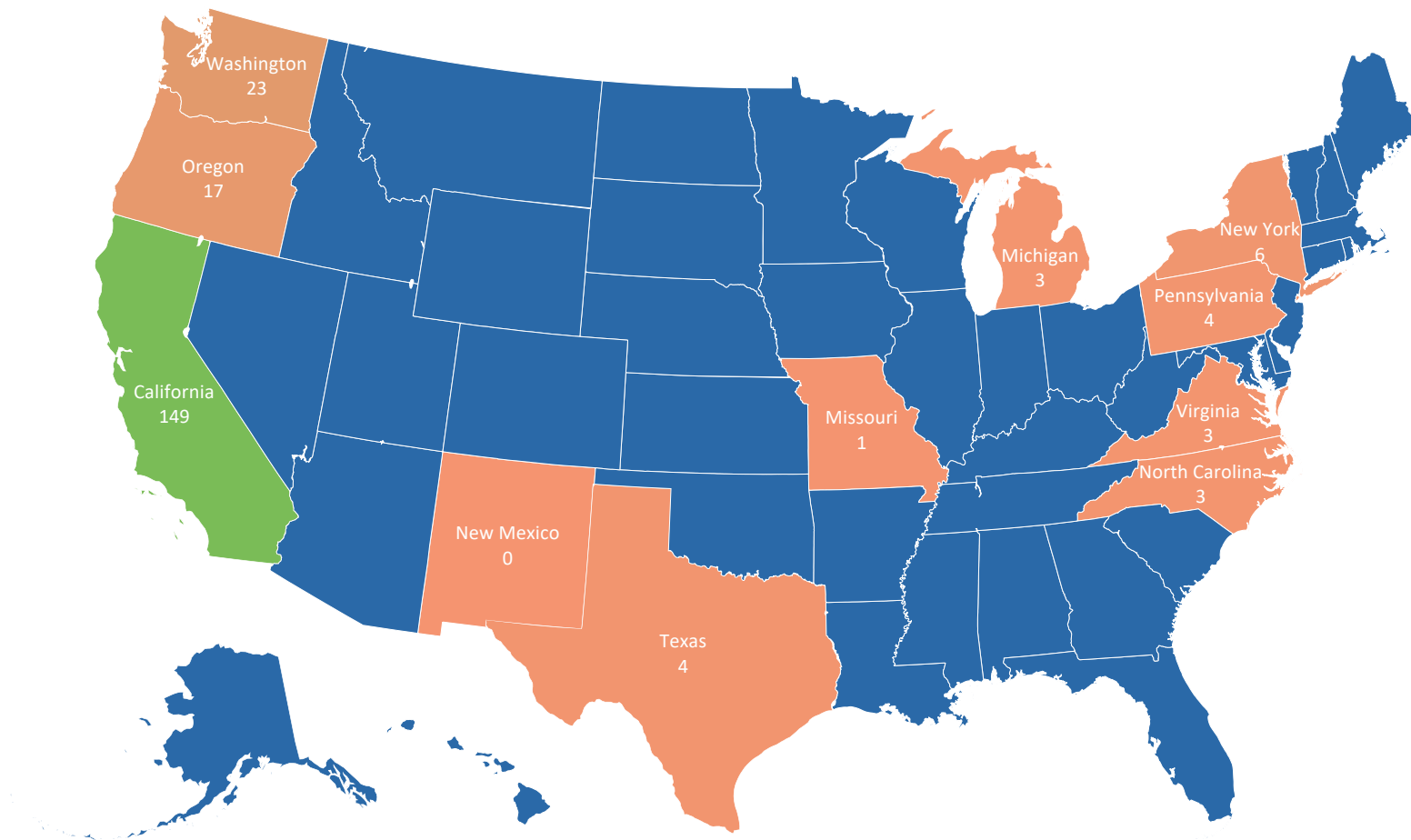
Rabobank





# Research Study Sample = 292 Wine Industry Executives

## Respondent Business Locations



Powered by Bing  
© GeoNames, Microsoft, TomTom

## Job Title %

**CEO/Owner**

**58%**

**CFO - Chief Financial Officer**

**5%**

**COO - Chief Operating Officer**

**4%**

**CMO - Chief Marketing Officer**

**2%**

**GM**

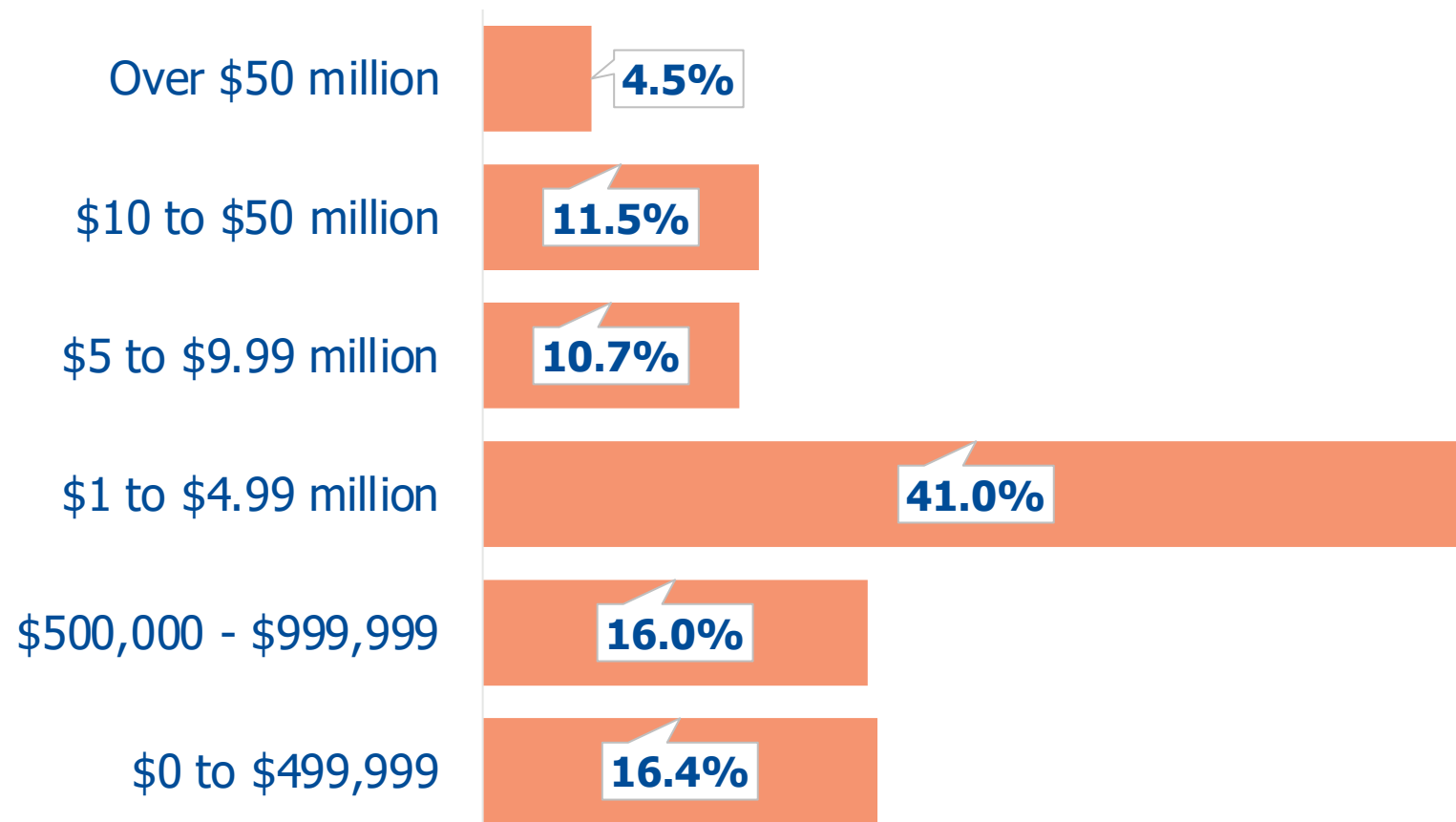
**19%**

**Other C-Suite**

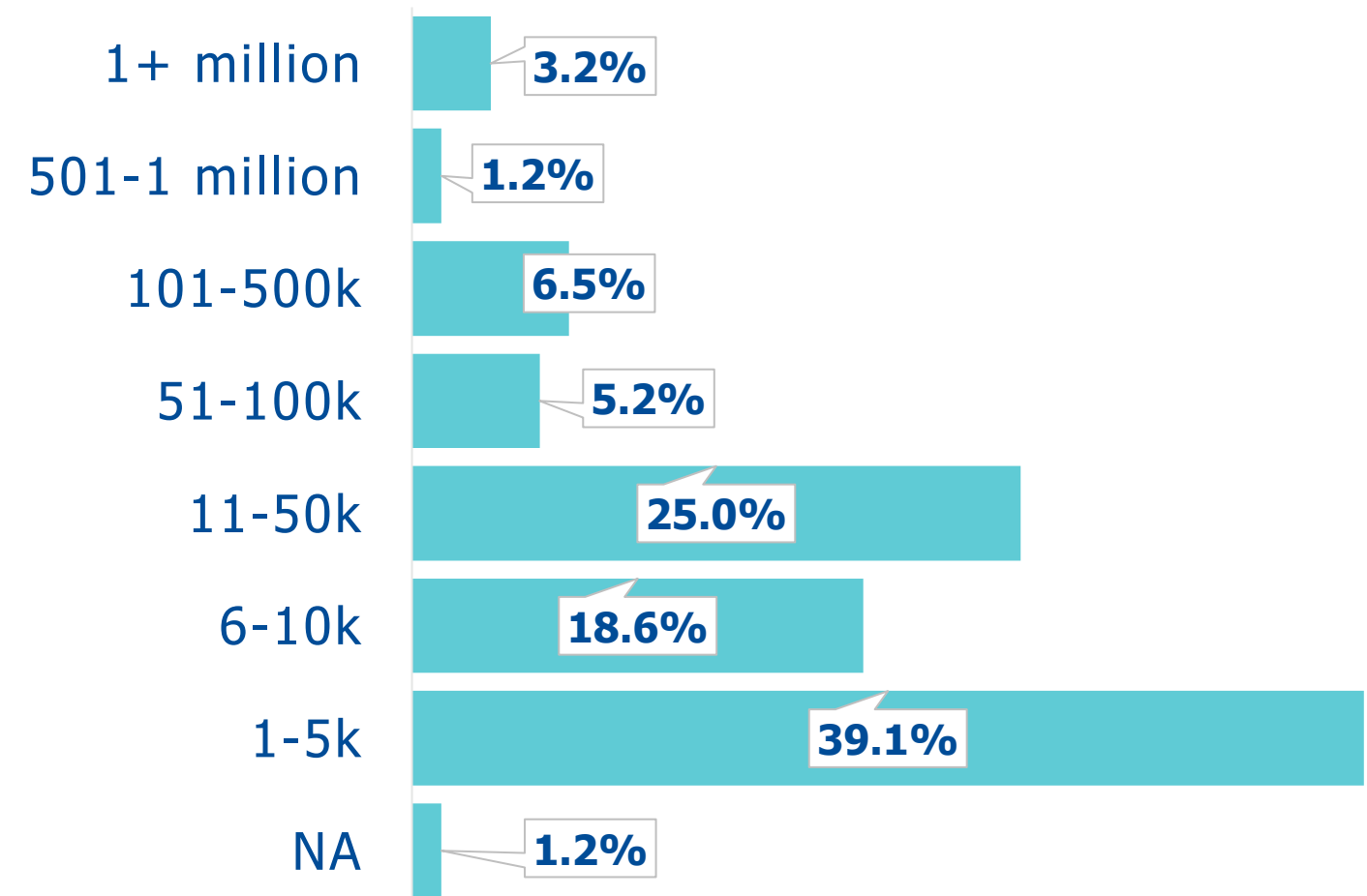
**12%**

# Research Study Sample

## Annual Revenues \$



## Average Winery Case Production







# Current Landscape



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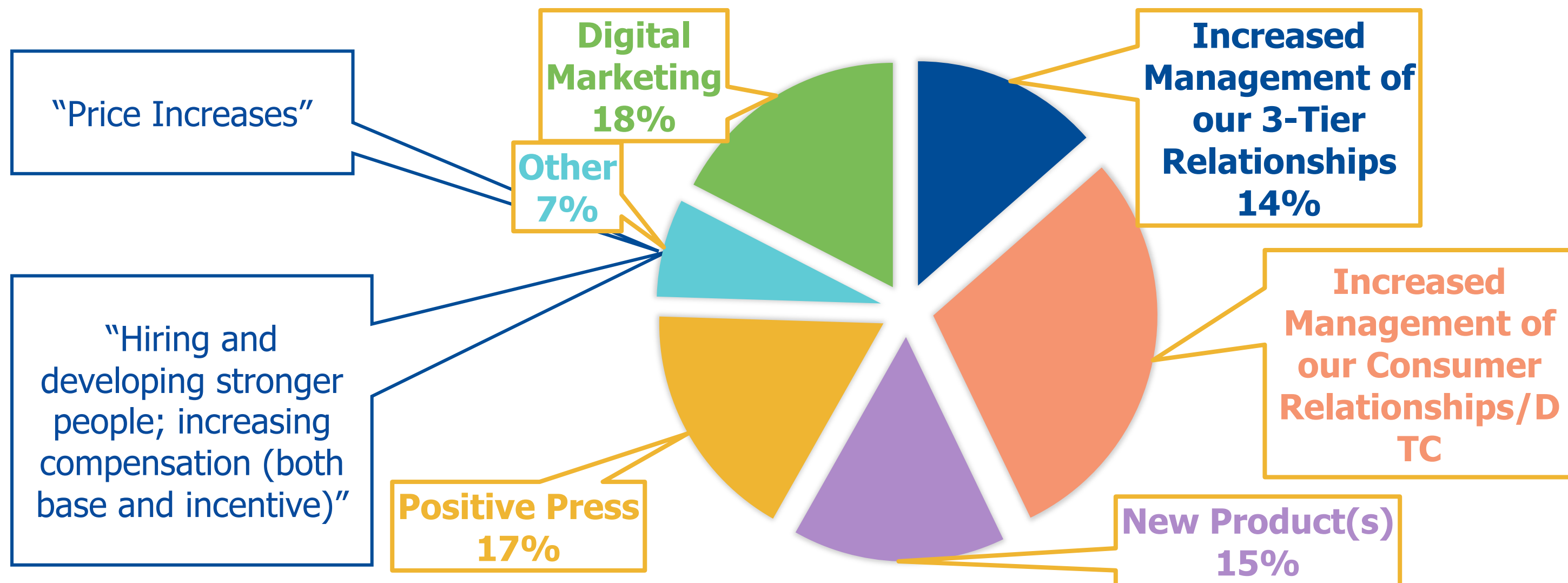
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# What is enhancing your company's bottom line?





# Discussion





# What is negatively impacting your bottom line?

Cost and Availability of...

Supply chain challenges

Brand Proliferation

Wholesale Consolidation

Regulations

29%

33%

9%

9%

14%

"Fuel and  
fertilizer  
costs"

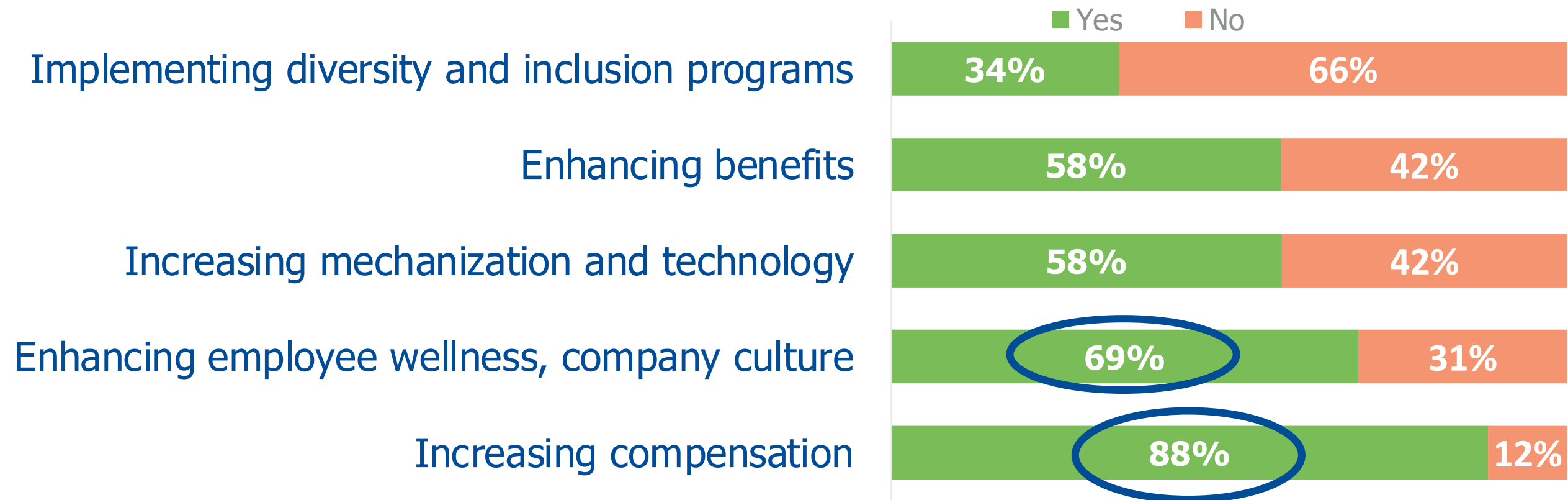
"Inflation  
hesitancy"

"Being too small for  
distributors to take  
seriously"

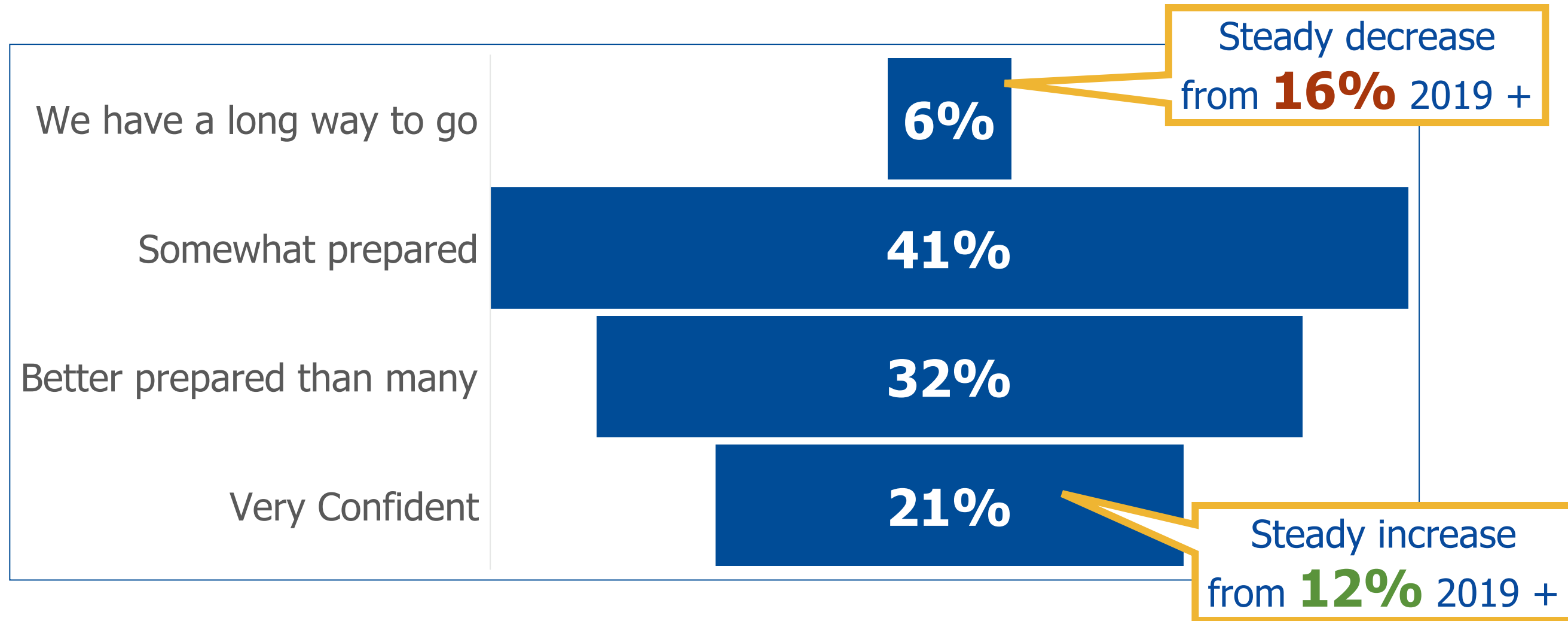
"Cost of visitation to  
Napa area is  
becoming prohibitive  
for a lot of visitors  
who then go  
elsewhere"



# How are you managing the tight labor and talent situation today?



# How prepared is your company for the next disaster, fire, drought, earthquake, etc.?





# Discussion







# Inventory & Packaging



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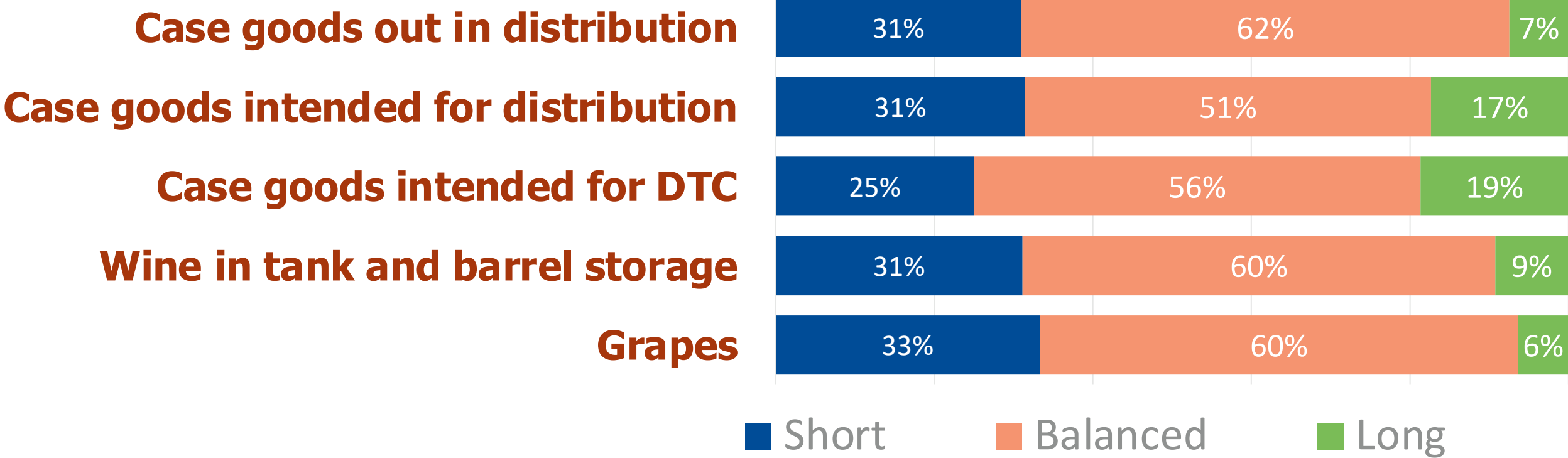
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BUSINESS  
INSTITUTE

**25**  
YEARS

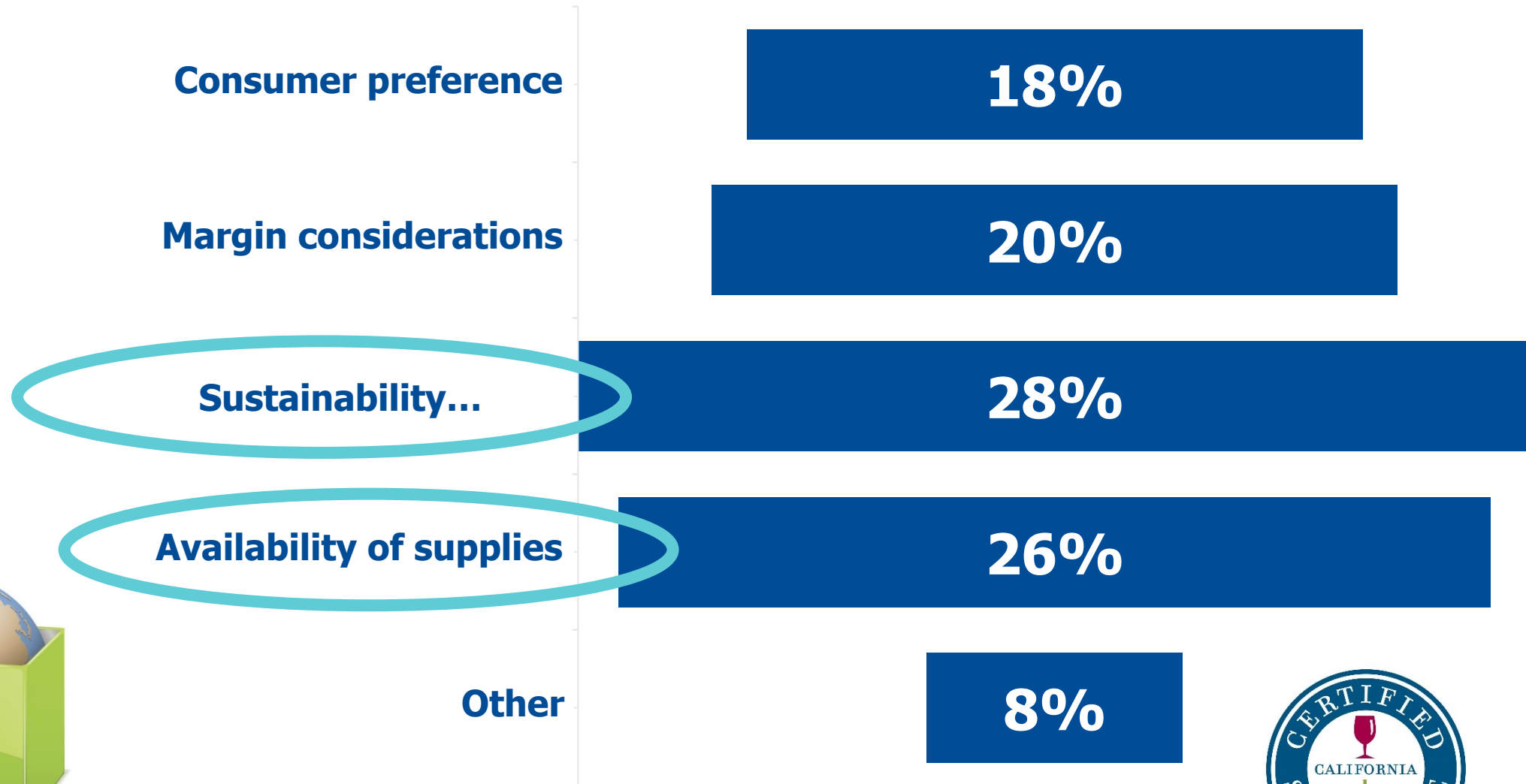
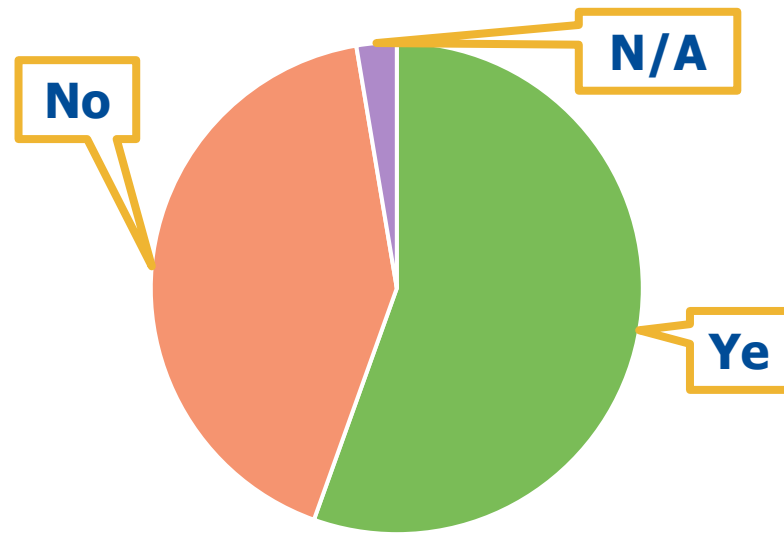
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# A snapshot of supply today: what is the current state of your inventory?



# Are you making additions or changes to your packaging?





# Discussion





# Consumers



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# What percentage of your DTC customers would you estimate are **Millennials** and **Gen Z**?



Most (**52%**) Wine Businesses  
say:  
**< 25%** of consumers are under  
**40** years old

# Are you pursuing any specific initiatives that target this younger segment?



**2021**

**Yes  
39%**

**No  
61%**

**2022**

**Yes  
52%**

**No  
48%**



# Discussion







# Categories & Opportunities



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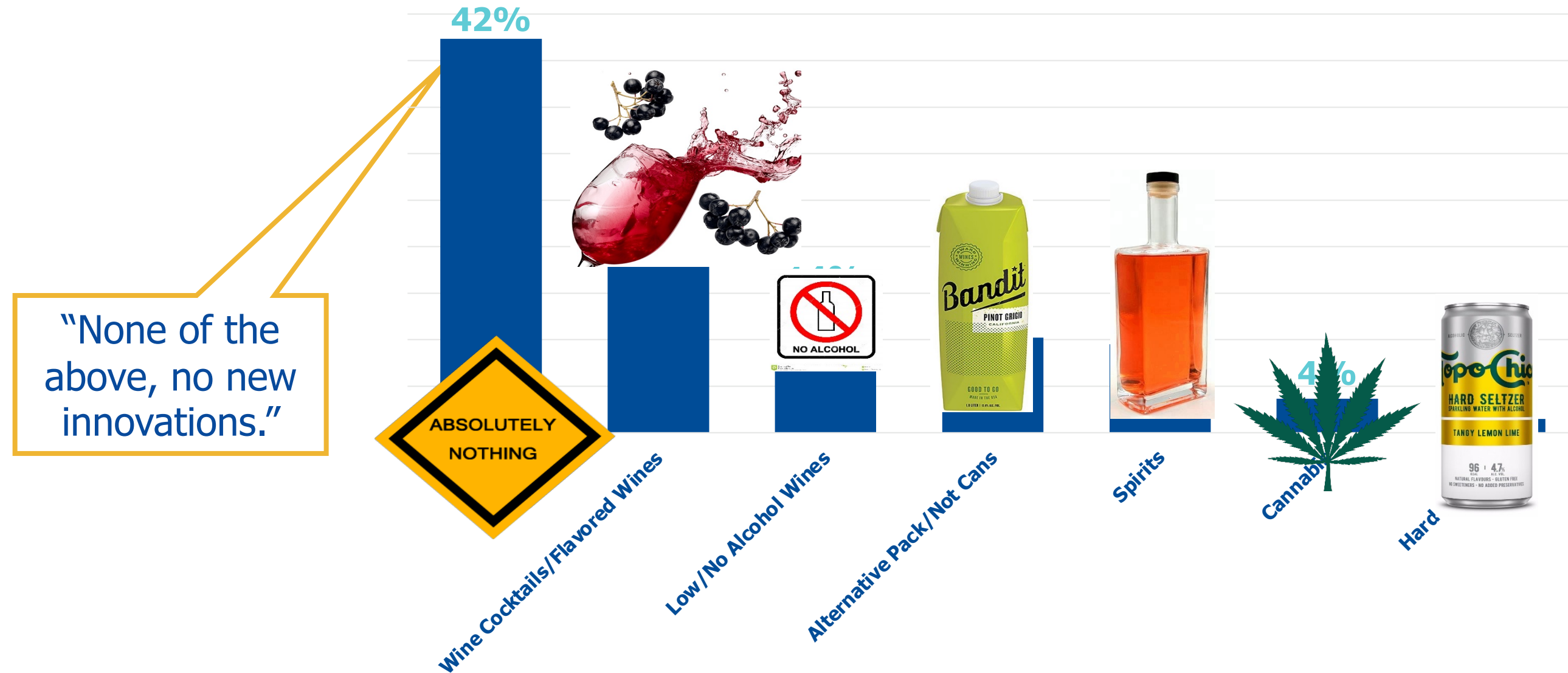


# Do you have any of the following in your portfolio?





# What potentially hot category will be you betting resources on in the coming year?





# Discussion





# Closing Thoughts:



**EMILY PORTER**  
WINE BUSINESS  
INSTITUTE



**RAY JOHNSON**  
WINE BUSINESS  
INSTITUTE



**PREMA BEHAN**  
CO-FOUNDER & GENERAL  
MANAGER



THREE STICKS



**DANA SEXTON VIVIER**  
CHIEF FINANCIAL OFFICER



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# Transform Your Career

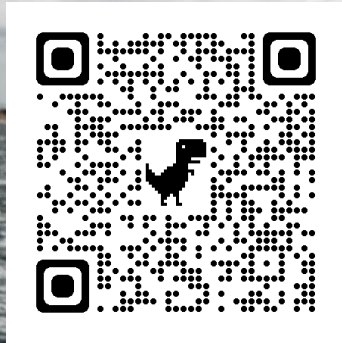
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Integrated leadership development.

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**Meet our alumni: [wbi25.sonoma.edu](http://wbi25.sonoma.edu)**

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survey data, email  
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