Australian Government

Wine Australia

Women in the Australian wine sector

How have the numbers changed in CEO, winemaking, viticulture, and marketing roles since 2013?



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Executive Summary

The Australian grape and wine sector is consistently well within the top 10 largest producers in the world[1]. Contribution of the sector to the Australian economy is substantial, with an estimated $45.5 billion in gross output, while supporting over 163,000 direct and indirect full and part-time jobs[2]. Although positive contributions remain evident, in recent times considerable challenges have arisen, including global wine oversupply, significant duties on Australian wine to China, effects of COVID-19, changing consumer preferences and adapting to a changing climate.

With respect to the gender composition of the workforce, a study published in 2015 (using data from 2007–2013) demonstrated that, with the exception of marketing roles, men held the vast majority of leadership, winemaking and viticulturist roles in the Australian wine sector. That particular study was a world first considering gender balance in the Australian grape and wine sector.

As a means to examine progress, the current study uses the same methodology to determine the composition of women in leadership roles, using data from 2021–2023 (ten years after the original dataset). While recognising women work across the wine value chain, this particular dataset is limited to CEO, winemaker, viticulturist and marketing roles across the sector.

The findings are revealing.

Table ES1 demonstrates that, nationally, women in a CEO role stands at 33.7 percent, an increase of 21 percent over the previous findings. In a winemaking role, women's representation stands at 16.7 percent, an increase of 7.9 percent over the previous findings. Regarding viticulturist and marketing roles, women's representation is 21.5 percent and 58.4 percent, an increase of 11.5 percent and 4.9 percent, respectively, over the previous findings.

While there is certainly progress, particularly in CEO and viticulturist roles, room remains to move forward to greater representation of women across the sector.

Several options are considered in this report, including better (or equal) pay, greater female ownership of wineries, regional networks or associations catering to women in the sector, targeted mentorship, improved knowledge of women's pathways in the sector and a focus on policy, such as recommendations regarding gender quotas for specific top leadership roles. The reasons for choosing these options are discussed in Section 4.

[1] https://worldpopulationreview.com/country-rankings/wine-producing-countries
[2] Gillespie, R., & Clarke, M. 2019. *Economic contribution of the Australian wine sector 2019*. Sydney: AgEconPlus and Gillespie Economics.

Table ES1: sample with year ending in 2023

All States	
Percentage women by role	
	Percent
Women CEOs	33.7
Women winemakers	16.7
Women viticulturists	21.5
Women marketers	58.4
Number of wineries	2,190 (average)

New South Wales	
Percentage women by role	
	Percent
Women CEOs	34.1
Women winemakers	19.1
Women viticulturists	26.5
Women marketers	62.6
Number of wineries	414 (average)

Queensland	
Percentage women by role	
	Percent
Women CEOs	33.2
Women winemakers	8.1
Women viticulturists	12.3
Women marketers	58.3
Number of wineries	64 (average)

South Australia	
Percentage women by role	
	Percent
Women CEOs	31.4
Women winemakers	15.9
Women viticulturists	24.2
Women marketers	58.6
Number of wineries	681 (average)

Tasmania	
Percentage women by role	
	Percent
Women CEOs	34.4
Women winemakers	23.0
Women viticulturists	24.6
Women marketers	54.1
Number of wineries	96 (average)

Victoria	
Percentage women by role	
	Percent
Women CEOs	32.9
Women winemakers	18.3
Women viticulturists	27.1
Women marketers	59.7
Number of wineries	633 (average)

Western Australia	
Percentage women by role	
	Percent
Women CEOs	36.2
Women winemakers	15.6
Women viticulturists	14.3
Women marketers	56.8
Number of wineries	302 (average)

1. Introduction and approach to the study

The role of women in business leadership has long been a topic of interest and is seen as a critical imperative[3]. In some countries, such as France, Norway, Spain and Sweden, governments have legally set gender quotas for boards of directors to ensure adequate levels of diversity at the top—and to robustly tap into the expertise and skills that women offer[4]. Many studies have found gender quotas to be beneficial, including through its positive impact on the appointment of a female board chair and a female CEO. A 2016 study of more than 21,000 companies in 91 countries showed that firms with at least 30 percent women in the C-suite are more profitable[5]. Australia has not legislated quotas for women's corporate board representation, but has been successful in increasing the number of women on its ASX200 boards from 8.3 per cent in 2009 to 34.7 per cent in 2022[6].

With respect to workforce representation, the original study published in 2015 revealed that women represented around 9 percent of the winemaker's population[7]. Further, the study found that in CEO (or equivalent), viticulturist and marketing roles, women's representation was 13 percent, 10 percent and 54 percent, respectively (covering the 2007– 2013 time period).

Over the years, increasing representation of women across the sector has been highlighted in various reports, media and through well-known, award-winning women winemakers, viticulturists, marketers and others, all of which could be taken as a signal of clear and substantial progression of women in the sector[8]. However, research evidence suggests that women in the wine sector continue to face hurdles in advancing to senior and prominent roles[9].

In the context of wine, it is also important to recognise that women are increasingly noted as impacting on wine choice, consumption, purchase, appreciation and having influence in the wine value chain[10].

For the present study, Wine Australia requested an update of the original study published in 2015 on women in top leadership roles in the Australian wine sector[11]. As Wine Australia is seeking to identify

[3] See, for example, Curtis, M., Schmid, C., & Struber, M. 2012. *Gender diversity and corporate performance*. Zurich: Credit Suisse; Krishnan, H.A., & Park, D. 2005. A few good women – on top management teams. *Journal of Business Research*, 58: 1712-1720; McCabe, A.C., Ingram, R., & Dato-on, M.C. 2006. The business of ethics and gender. *Journal of Business Ethics*, 64: 101-116; https://www.mckinsey.com/featured-insights/diversity-and-inclusion/women-in-the-workplace#/

[4] Galbreath, J. 2015. A study of women in top business roles: The case of the wine industry. *International Journal of Wine Business Research*, 27: 143-158.

[5] https://hbr.org/2016/02/study-firms-with-more-women-in-the-c-suite-are-more-profitable

[6] https://www.uq.edu.au/news/article/2022/07/women-boards-not-empowered-diversity-quotas#:~:text=Australia%20has%20not%20legislated%20quotas,34.7%20per%20cent%20this%20year.

[7] Ibid, Galbreath.

[8] Ibid, Galbreath.

[9] Bryant, L., & Garnham, B. 2014. The embodiment of women in wine: Gender inequality and gendered inscriptions of the working body in a corporate wine organisation. *Gender, Work & Organization*, 21: 411-426. See also, Alonso, A.D., Kok, S., & Galbreath, J. 2021. Entrepreneurial women in the wine industry: A study in emerging economies. *International Journal of Wine Business Research*, 33: 197-216.

[10] Livat, F., & Jaffré, C. 2022. Women in wine… occasionally. Gendered roles in the wine industry. In Charters, S., Demossier, M., Dutton, J., Harding, G., Maguire, J.S., Marks, D., & Unwin, T. (Eds.), *The Routledge Handbook of Wine and Culture:* 318-325. New York: Routledge.

[11] Ibid, Galbreath.

existing resources, gaps and opportunities to help the Australian grape and wine sector implement and demonstrate equity and inclusion outcomes, this study provides insight to help in that endeavour.

1.1 Approach

Winetitles is an Australian media company delivering wine sector publications, which focus on news, views and research and development. Conducted for 40 years and updated annually, Winetitles has published *The Australian and New Zealand Wine Industry Directory*. The *Directory* is one of the most trusted sources of information on wine producers and ancillary services, such as suppliers, distributors and retailers.

For this study, Winetitles provided special-order databases that include information from the *Directory*, but also several other fields and details not listed elsewhere, including personnel titles (roles) and the names of individuals in these titles. Years covered are 2021–2023, such that new updates could be extracted and averages taken and compared with the study published in 2015.

2. Methodology

As with the results published in 2015, the leadership roles of interest include CEO (or equivalent), winemaker, viticulturist and marketing[12]. These roles are in scope as they have authority over the strategic, operational, production and branding and marketing efforts of any winery[13]. To capture diversity, if the names in each of the roles was a woman's name, they were coded 1, 0 otherwise. If names could be considered applicable to both a man and a woman (e.g. Chris, Jamie, Kim, Sam), winery websites were consulted or research via a search engine was conducted until clarification was achieved. Each role for each winery in each year was sighted manually and coded into SPSS for analysis.

In addition to gender, regions were coded to allow for comparisons, and include New South Wales, Queensland, South Australia, Tasmania, Victoria and Western Australia. These states constitute nearly 100 percent of Australia's wine production. Other variables captured include winery age, winery size and export orientation. For winery age, the year that the winery was established was subtracted from the year of the data file (i.e. 2023, 2022, 2021). For size, number of cases produced was used, where 1 = 1 to 2,499 cases, 2 = 2,500 to 19,999 cases, 3 = 20,000 to 99,999 cases, 4 = 100,000 to 1,499,999 cases and 5 = over 1,500,000 cases. For export orientation, wineries were coded on the basis of what percentage of sales were for export markets, where 1 = do not export, 2 = 1 to 25 per cent, 3 = 26 to 50 per cent, 4 = 51 to 75 per cent and 5 = 76 to 100 per cent. Data for all these variables were collected from the Winetitle's databases and company web sites (where applicable).

[12] Because most wineries in Australia are small or micro size, equivalent titles to the CEO include Director, General Manager, Managing Director, Managing Partner and Proprietor.
[13] Ibid, Galbreath.

3. Findings

3.1. ***Previous study (year ending 2013)***

To consider the extent to which women in the wine sector are advancing, a summary of the findings of the previous study are highlighted. Published in 2015, with the time period for the years of study 2007–2013 (averages were taken), **Table 1** demonstrates that women in a marketing role in the wine sector appeared to have made the greatest headway (nearly 54 percent women). Alternatively, women in CEO roles were less than 15 percent and in winemaking roles less than 10 percent. However, as evidenced in **Table 1**, there were differences between states.

Table 1 (sample with year ending in 2013)

All States	
Percentage women by role	
	Percent
Women CEOs	12.7
Women winemakers	8.8
Women viticulturists	10.0
Women marketers	53.5
Number of wineries	2,394 (average)

New South Wales	
Percentage women by role	
	Percent
Women CEOs	13.8
Women winemakers	9.2
Women viticulturists	10.7
Women marketers	56.6
Number of wineries	461 (average)

Queensland	
Percentage women by role	
	Percent
Women CEOs	14.6
Women winemakers	4.2
Women viticulturists	9.2
Women marketers	51.3
Number of wineries	107 (average)

South Australia	
Percentage women by role	
	Percent
Women CEOs	11.5
Women winemakers	9.8
Women viticulturists	8.7
Women marketers	49.0
Number of wineries	644 (average)

Tasmania	
Percentage women by role	
	Percent
Women CEOs	15.3
Women winemakers	8.5
Women viticulturists	10.0
Women marketers	55.4
Number of wineries	99 (average)

Victoria	
Percentage women by role	
	Percent
Women CEOs	12.5
Women winemakers	6.9
Women viticulturists	12.8
Women marketers	54.0
Number of wineries	714 (average)

Western Australia	
Percentage women by role	
	Percent
Women CEOs	12.2
Women winemakers	12.1
Women viticulturists	6.1
Women marketers	58.1
Number of wineries	369 (average)

Regarding states studied, the 2015 study predicted that women in the wine sector in South Australia would have made greater progress in top roles than in other states. This level of advancement was predicted because of South Australia's prominence as the largest wine producer and largest wine exporter in Australia, while serving as a hub for wine education, policy development and R&D activity. However, while the results showed growth across the board, the results indicated that there was not strong evidence with

respect to higher women's representation rates in top roles in South Australia; hence, evidence suggesting that location is a strong predictor for the roles studied was not found.

3.2. Current study – descriptive statistics

Table 2 highlights descriptive statistics for the current study. The mean age for wineries in the sample is 30.9 years old. As for size, the results indicate that most wineries in Australia are relatively small in terms of case production, with a mean of 1.8 (s.d. = .83) (see notes in **Table 2** for coding explanation). Reflecting the known rate of decline in wine exports[14], export percentage has dropped from the earlier study (**Table 2**). Lastly, similar to the past findings, there is no evidence to suggest that being located in South Australia advantages women in the roles studied[15].

3.3. Current study – CEO role

For analysis, years covered are 2021–2023 and averages taken. **Table 3** presents the results. As can be seen, women in a CEO role (or equivalent) in Australian wineries have seen an increase over the previous study. **Table 3** demonstrates that 33.7 percent of those in a CEO role (or equivalent) are women. The results are statistically significant ($p < 0.001$) compared to the findings ending in 2013 from the original study[16]. While Western Australia has the highest overall percentage (36.2 percent), all states demonstrate good increases that are statistically significant ($p < 0.001$). Several explanations are offered for the findings.

First, the literature notes that institutional influence exerts considerable power over the adoption of organisational practices[17]. Coercive influence includes pressures from external actors such as governments or the media. Mimetic influence includes pressures from competitors or like organisations. Normative influence includes pressures from expectations surrounding adaptation to professional standards or informal rules associated with values and explicit moral commitments. Companies are thought to conform to social influences and therefore, to gain legitimacy, follow social expectations.

In recent years, there has been substantial institutional focus on gender equality and inclusion in the workplace, so much so that women in executive roles, such as the CEO, have increased. For example, in 2013, women CEOs in Australia are estimated to be between 10 and 12 percent[18]. Current reporting demonstrates an increase to over 22 percent[19]. Hence, one plausible explanation for the increase in the findings could be due to institutional influence on businesses in Australia (including wineries) to lift hiring of

[14] https://www.wineaustralia.com/news/media-releases/export-report-december-2023#:~:text=Export%20results%20reflect%20challenging%20global%20trends&text=Australian%20wine%20exports%20declined%20by,Australia's%20Export%20Report%20released%20today
[15] Confirmed by a chi-square test.
[16] For comparisons between the two time periods reported in Section 3, *t*-tests were used.
[17] Galbreath, J. 2019. Drivers of green innovations: The impact of export intensity, women leaders and absorptive capacity. *Journal of Business Ethics,* 158: 47-61.
[18] Calculations are based on various articles and reports from the Workplace Gender Equality Agency. https://www.wgea.gov.au/
[19] https://www.wgea.gov.au/sites/default/files/documents/EOWA_Annual_Report-0708.pdf; https://www.pmc.gov.au/resources/national-strategy-achieve-gender-equality-discussion-paper/current-state/leadership; Note that in ASX200 companies, there are now 37.4 percent women on boards.

women in a top executive role, such as the CEO, in order to conform to social expectations – and to gain legitimacy. The wine sector could conceivably be responding well.

Second, succession is a potential factor. For example, given that the wine sector tends to have strong family ties, heritage and tradition, there could be the possibility of family or generational succession. As the original study found a much lower percentage of women in the CEO role (**Table 3**), with the progression of time, more women in families who have come through the ranks could now be progressing to the top role. Further, as women have transitioned from viticulture/oenology graduates to 'working their way through the system', there is the possibility that more of them are in line and are succeeding in moving into the top executive role.

Third, given the benefit of hindsight and access to data from the original study, since 2007, there has been an observed increase in couples *co-sharing* CEO duties in the wine sector[20]. Further, there is also an observed increase in women–men partnerships (non-marriage partnerships) who are co-sharing CEO duties and ownership of wineries. As such partnerships appear to have increased, women in CEO roles are on the rise.

Lastly, since 2012, advocacy efforts within the sector, have sought to empower and promote the achievements of women and raise awareness of the importance of diversity, equality and inclusion[21]. As stories of achievement are told and circulated, other women both from within and outside the sector could be gaining inspiration to take up the charge of leading wineries at the highest level, although it is recognised that more effort is needed to grow and sustain this momentum, as well as support aspirations and women staying in the sector.

In sum, women in CEO roles in Australian wineries has seen a solid increase since 2013. Several reasons have been noted for such increases. However, there is likely more complexity and nuance to the findings and a combination of factors could be contributing to women's progress.

[20] Based on the author's observation and analysis.

[21] Including the efforts of Australian Women in Wine, women-specific wine sector events and tasting opportunities such as The Fabulous Ladies' Wine Society, and organisations such as Wine Australia and Australian Grape & Wine establishing the Diversity and Equality in Wine (DEIW) Charter, along with individuals and professional associations across the sector.

Table 2: descriptive statistics for sample with year ending in 2023 compared to sample with year ending in 2013

All States		
Descriptives		
	Mean (ending 2013)	Mean (ending 2023)
Age (in years)	33.1 (20.1)	30.9 (15.9)
Size (cases)	1.6 (.74)	1.8 (.83)
Export orientation	2.1 (1.5)	1.7 (.79)
Number of wineries	2,394 (average)	2,199 (average)

New South Wales		
Descriptives		
	Mean (ending 2013)	Mean (ending 2023)
Age (in years)	34.2 (22.1)	32.3 (24.1)
Size (cases)	1.7 (.84)	1.8 (.88)
Export orientation	2.1 (.92)	1.7 (.81)
Number of wineries	461 (average)	414 (average)

Queensland		
Descriptives		
	Mean (ending 2023)	Mean (ending 2023)
Age (in years)	29.5 (15.6)	27.7 (12.5)
Size (cases)	1.5 (.64)	1.6 (.80)
Export orientation	1.9 (1.1)	1.3 (.72)
Number of wineries	107 (average)	64 (average)

South Australia		
Descriptives		
	Mean (ending 2013)	Mean (ending 2023)
Age (in years)	33.7 (27.8)	30.1 (26.0)
Size (cases)	1.9 (.91)	2.1 (.79)
Export orientation	2.8 (1.1)	1.9 (.95)
Number of wineries	644 (average)	681 (average)

Tasmania		
Descriptives		
	Mean (ending 2013)	Mean (ending 2023)
Age (in years)	33.0 (9.9)	30.3 (11.2)
Size (cases)	1.3 (.62)	1.5 (.83)
Export orientation	1.8 (.71)	1.6 (.70)
Number of wineries	99 (average)	96 (average)

Victoria		
Descriptives		
	Mean (ending 2013)	Mean (ending 2023)
Age (in years)	35.0 (24.6)	33.0 (25.5)
Size (cases)	1.5 (.72)	1.7 (.87)
Export orientation	2.0 (.84)	1.7 (.80)
Number of wineries	714 (average)	633 (average)

Western Australia		
Descriptives		
	Mean (ending 2013)	Mean (ending 2023)
Age (in years)	33.7 (20.3)	32.4 (21.7)
Size (cases)	1.7 (.71)	1.9 (.82)
Export orientation	2.0 (.80)	1.8 (.74)
Number of wineries	369 (average)	302 (average)

Notes: Means are provided (standard deviations in parentheses). Size in cases produced, where 1 = 1 to 2,499 cases, 2 = 2,500 to 19,999 cases, 3 = 20,000 to 99,999 cases, 4 = 100,000 to 1,499,999 cases and 5 = over 1,500,000 cases. Export orientation is export sales percentage, where 1 = do not export, 2 = 1-25 percent, 3 = 26 to 50 percent, 4 = 51 to 75 percent and 5 = over 75 percent.

Table 3: sample with year ending in 2023 compared to sample with year ending in 2013

All States		
Percentage women by role		
	Percent (ending 2013)	Percent (ending 2023)
Women CEOs	12.7	33.7
Women winemakers	8.8	16.7
Women viticulturists	10.0	21.5
Women marketers	53.5	58.4
Number of wineries	2,394 (average)	2,190 (average)

New South Wales		
Percentage women by role		
	Percent (ending 2013)	Percent (ending 2023)
Women CEOs	13.8	34.1
Women winemakers	9.2	19.1
Women viticulturists	10.7	26.5
Women marketers	56.6	62.6
Number of wineries	461 (average)	414 (average)

Queensland		
Percentage women by role		
	Percent (ending 2013)	Percent (ending 2023)
Women CEOs	14.6	33.2
Women winemakers	4.2	8.1
Women viticulturists	9.2	12.3
Women marketers	51.3	58.3
Number of wineries	107 (average)	64 (average)

South Australia		
Percentage women by role		
	Percent (ending 2013)	Percent (ending 2023)
Women CEOs	11.5	31.4
Women winemakers	9.8	15.9
Women viticulturists	8.7	24.2
Women marketers	49.0	58.6
Number of wineries	644 (average)	681 (average)

Tasmania		
Percentage women by role		
	Percent (ending 2013)	Percent (ending 2023)
Women CEOs	15.3	34.4
Women winemakers	8.5	23.0
Women viticulturists	10.0	24.6
Women marketers	55.4	54.1
Number of wineries	99 (average)	96 (average)

Victoria		
Percentage women by role		
	Percent (ending 2013)	Percent (ending 2023)
Women CEOs	12.5	32.9
Women winemakers	6.9	18.3
Women viticulturists	12.8	27.1
Women marketers	54.0	59.7
Number of wineries	714 (average)	633 (average)

Western Australia		
Percentage women by role		
	Percent (ending 2013)	Percent (ending 2023)
Women CEOs	12.2	36.2
Women winemakers	12.1	15.6
Women viticulturists	6.1	14.3
Women marketers	58.1	56.8
Number of wineries	369 (average)	302 (average)

3.4. Current study – other roles

With respect to the other roles studied, 16.7 percent of winemaking roles are held by women (**Table 3**). The original study found 8.8 percent of women were in the role; hence, over a ten-year period, there has been an increase of 7.9 percent, which is statistically significant ($p < 0.001$). While this is a good result, the role is still dominated by men, and one reason could be pay differentials (described in Section 4). Regarding viticulturist roles, women's representation stands at 21.5 percent in the current period, up from 10 percent in the original study (**Table 3**). The difference is statistically significant ($p < 0.001$). Again, as with winemaking roles, pay differentials could be leading to the position still being dominated by men. In marketing roles, the results are fairly steady with respect to the original study. Women comprise 58.4 percent of marketing roles, as compared to 53.5 percent in the original study (**Table 3**). The result is significant ($p < 0.01$).

As with the original study, the results suggest variation between states with respect to these other roles (**Table 3**). Tasmania is found to have the highest percentage of women winemakers at 23 percent, while Queensland is the lowest at 8.1 percent. In viticulturist roles, Victoria has the highest percentage of women at 27.1 percent, while Queensland has the lowest at 12.3 percent. In marketing roles, New South Wales has the highest percentage of women at 62.6, while Tasmania has the lowest at 54.1 percent.

With respect to states, results suggest differences when comparing the two time periods (2021–2023 vs 2007–2013) for these other roles (**Table 3**). In winemaking roles, statistically significant differences exist for all states except Queensland ($p > 0.05$). With respect to viticulturist roles, statistically significant differences exist for all states except Queensland ($p > 0.05$). Lastly, for marketing roles, statistically significant differences exist for South Australia ($p < 0.001$) and Victoria ($p < 0.05$), but not for New South Wales ($p > 0.05$), Queensland ($p > 0.05$), Tasmania ($p > 0.05$) and Western Australia ($p > 0.05$).

Overall, these results suggest that women are making progress (although variation exists at a state level). Progress is particularly noted in CEO and viticulturist roles. However, there appears to be further room for improvement, given the 10 years of time between the original study.

4. Pathways to Improvement?

As with any area that is perceived as needing improvement, there are many potential options or pathways. Given the findings of the current study and those previously published, six options are put forward.

4.1. Pay

In general, evidence suggests that women are paid less than men in the workforce. On average, in Australia, for every $1 a man makes, women earn 78c[22]. Over the course of a year, that difference adds up to $26,393. With respect to the wine sector, latest statistics from the ATO suggest that women in the winemaking roles are earning $14,000 on average less than their male counterparts[23]. For women viticulturists and grapegrowers, women are earning $18,500 on average less[24]. Hence, there may very well be a barrier for women to enter the sector (particularly in winemaking and viticulturalist roles) if they perceive unequal pay. Further, once they enter the sector and find lack of promotion or improvement in pay relative to men, this too can be a barrier. To lift the inclusion of women in the wine sector (both attracting and retaining) and to benefit from their expertise and skills, particularly in top leadership roles, pay that demonstrates equality should be strongly considered among wineries.

4.2. Ownership

Owning a business creates a self-sufficient pathway to personal fulfilment, satisfaction and community contribution. As women own more wineries, leadership opportunities increase and the potential to attract more women to the sector could increase. For example, evidence suggests here that when women are in a CEO role in a winery, the likelihood that women also fill winemaking, viticulturists and marketing roles increases[25]. Hence, incentives for women to own wineries, such as tax cuts, low-interest loans, government grants or improved access to specialised educational opportunities (e.g. leadership training) could be a pathway.

4.3. Local/Regional associations for women in the sector

According to a recent study, women's 'networks' in the wine sector prove to be successful in navigating a male-dominated profession[26]. Where they do not already exist, wine regions around the country could seek to form local groups for women to find support and opportunity to communicate, discuss and together face the challenges of moving up in the wine sector.

[22] https://www.wgea.gov.au/pay-and-gender/gender-pay-gap-data
[23] Ibid.
[24] https://winetitles.com.au/women-in-wine-to-push-for-action-on-gender-equality/
[25] Ibid, Galbreath and this study.
[26] Ibid, Alonso et al. See also, Santos, G., Marques, C.S., & Ratten, V. 2019. Entrepreneurial women's networks: The case of d'Uva–Portugal wine girls. *International Journal of Entrepreneurial Behaviour and Research*, 25: 298-322.

4.4. Mentorship/Preparation – importance of 'male champions'

Research suggests that sponsorship and mentorship by men is crucial for improving the gender balance and diversity in workplaces and leadership teams[27]. For a brighter future, men and women in the Australian wine sector need to work together and learn to effectively leverage their individual capabilities and skills in a constructive way, while ensuring that women are prepared to lead and take up the most vital, top roles.

4.5. Better informed knowledge

Evidence suggests that the balance of men and women enrolling in viticulture/oenology courses in Australia is roughly 50/50[28]. However, according to statistics reported here, women in winemaking and viticulturist roles are far less than 50 percent. To better account for this discrepancy, those who administer and run viticulture/oenology courses around the country are encouraged to track their female graduates over time to closely examine career paths, with the aim of more deeply understanding why participation rates may or may not decline after degree completion. These findings should be made publicly available.

4.6. Policy/quotas

Mandated (by law) gender quotas, while improving equality, have come with controversy. For example, in Norway, where gender quota laws have been put in place for boards of directors, some companies have gone as far as adopting new corporate forms to avoid compliance[29]. Legal quotas are complicated because there is a balance between the free market, abilities and skills needed in given roles and government-imposed control. However, given the current status of winemakers and viticulturists (if not CEOs) in the wine sector, one option could be for Australian Grape & Wine as the sector advocacy body recommend preferred *targets* for women in such roles. By doing so, a benchmark is set for which wineries can aspire to meet.

[27] https://hbr.org/2019/08/what-men-can-do-to-be-better-mentors-and-sponsors-to-women
[28] Ibid, Galbreath.
[29] Bøhren, O., & Strøm, Ø. 2010. Governance and politics: Regulating independence and diversity in the board room. *Journal of Business Finance & Accounting*, 37: 1281-1308.

5. Conclusions and Limitations

Nearly 10 years after one of the world's first published studies of its kind[30], there appears to be some good news regarding women's advancement to top roles in the Australian wine sector. According to the findings, women in CEO roles has shown particularly strong evidence of progression as compared to 2013. In data ending in 2013, around 13 percent of women held CEO roles[31], which was on par with women CEOs in Australia estimated at between 10 to 12 percent. Current statistics have demonstrated an increase to 33.7 percent for the 2021–2023 period (averaged), which is higher than the estimated Australian average at 22 percent.

Women in winemaking and viticulturist roles show good increases as well (8.8 percent vs 16.7 percent and 10 percent vs 21.5 percent, respectively), while women in marketing roles remains somewhat steady (53.5 percent vs 58.4 percent). While these results are encouraging, in critical roles such as winemaking and viticulture, men still represent a vast majority. Hence, there is room to move forward and several pathways have been suggested, including better (or equal) pay, greater female ownership of wineries, local associations catering to women in the sector, targeted mentorship, improved knowledge of women's pathways in the sector and a focus on policy.

As with any study, there are limitations. First, while the results do suggest progress, other roles (e.g. administrators, cellar door/restaurant managers, export managers, and many others across the value chain) where women contribute significant impact to the success of wine businesses were not examined. Second, this study examines only Australian wineries; therefore, understanding of Australia's position in the world is limited. Third, the original study covered seven years, while the current study covers three. While three years is sufficient to generate averages, more granular trends over a longer period of time were not possible. Fourth, this study relies on data provided by Winetitles, through their annual *Australian and New Zealand Wine Industry Directory* and a custom-ordered dataset. While the expectation is that wineries update their details regularly, there could be a lagged effect. However, by relying on three years of data, any lags in reported details are likely to be accounted for.

In a final observation, although technically not a limitation, the findings must be placed in context. For example, there is evidence to suggest that over the years women are filling more than one role in wineries. Dual roles seem to be particularly the case with women serving in both CEO (or equivalent) and winemaking roles, such as in sole proprietorship wineries[32]. In other cases, an increase in the co-sharing of specific roles (e.g. CEO role) between men and women has been clearly observed. In this way, women can be involved in more than one role across a winery or else are sharing top leadership duties with men (either

[30] Ibid, Galbreath.
[31] As noted previously, because most wineries in Australia are small or micro size, equivalent titles to the CEO include Director, General Manager, Managing Director, Managing Partner and Proprietor.
[32] See also https://womeninwine.com.au/wp-content/uploads/2015/08/AAWE_WP178.pdf

with their spouses or for-purpose business partnerships). Therefore, the results should be considered in light of these observations.