

Professional Leave Report Cover Sheet

Name: Monique Bell

Department: Marketing & Logistics

College: Craig School of Business

Leave taken: ☒ Sabbatical ☐ Difference in Pay ☐ Professional Leave without Pay

Time Period: ☒ Fall
☐ Spring
☐ Academic Year
☐ Other

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POST-SABBATICAL REPORT

Monique L. Bell

Associate Professor of Marketing

The following report summarizes the objectives, accomplishments and anticipated future outcomes of the sabbatical period during Fall 2020:

A) Accomplishments

- 1) The principal research goal was to conduct approximately 10 in-depth interviews (on-site) with Black wine entrepreneurs and professionals in order to address a critical research gap in the business literature and trade press regarding Black contributions to the global wine industry.
 - Despite, or perhaps because of, the dual challenges of a global pandemic and global reckoning on racial justice, I exceeded my research goal by conducting **more than 40 in-depth, remote interviews** with Black entrepreneurs, as well as some wine Black professionals in states including California, Indiana, Oregon, New York, and Texas, and in the countries of **Germany and South Africa**.
 - Since I typically use experiments as my research methodology, I needed to strengthen my **qualitative research** acumen, which I accomplished through multiple readings and reviews.
 - To support my research goals, I actively engaged with the **African-American Vintners Association (AAAV)** by attending membership meetings serving on the newly-formed **Education and Scholarship Committee**.
- 2) A secondary research goal was to develop and distribute a survey, informed by the in-depth interviews and existing literature, to understand the motivations, challenges, perspectives and marketing strategies.
 - I completed a thorough **literature review** of wine, entrepreneurship and race scholarship to gain a deeper understanding of current theoretical frameworks and research questions of interest. I also tracked current popular media and trade press to stay abreast of current practical management and industry issues – particularly in the context of the pandemic and racial justice protests.
 - Through persistent outreach efforts, extensive social media recruiting, and snowball sampling, **more than 100 Black entrepreneurs and professionals** in wine responded to a extensive survey.
- 3) An unintended consequence yet welcome accomplishment was remarkable interest from trade media and wine organizations to access and understand the study findings, pursue additional research projects, and invite me for speaking opportunities, including:

Competitive Awards and Memberships

- **Josh Hart / Wine Access Diversity Award** – 100 scholarships awarded nationwide to fund coursework and exam for the Wine and Spirit Education Trust (WSET) Level 1 Certification.
- **Batonnage Forum Women in Wine Mentorship Program**
- **The Hue Society, Iris Rideau (Northern California) Chapter**

Media

- *Wine Enthusiast*: [The Drink Black Movement Must Tap the Source](#)
- *Santa Rosa Press Democrat*: [African American Vintners Hopeful over Future after Black Lives Matter Movement](#)
- *Uncorked & Cultured* byline: [Sipping Sober: Enjoying the “Dry” Wine Life](#)

Partnerships

- **Lodi Appellation Inclusion Collective (LAIC)** inaugural Inclusive Wine Competition (2022) committee – marketing and engagement
- **African American Vintners Association** – research recruitment and support
- **Black Vines Festival** - research recruitment and support
- **Women of the Vine and Spirits** – research recruitment support
- **Diversity in Food and Beverage** – research and media support

Scholarship

- **University of California, Davis**, Viticulture and Enology, Wine and Society (VEN 198) seminar guest lecture (May 2021)
- **Fresno State**, Viticulture and Enology, interdisciplinary student experience for enology majors and marketing students with Dr. Kristy Qun (Spring 2022)

B) Modifications

1) Study on Black Wine Entrepreneurs

The overwhelming response by Black wine entrepreneurs and professionals who were willing and compelled to participate in interviews of 90-120 minutes and complete the survey resulted in a (fortunate) abundance of data and subsequent time commitment. Data collection extended into November, which delayed analysis and journal article submission.

Further, the global pandemic, which required me to support my son through remote learning and prohibited external childcare and support, limited my time, energy and focus. The pandemic also hindered my planned participation at a number of wine symposia and events that were cancelled due to travel and social distancing restrictions.

2) Study on Black Wine Consumers

The extended entrepreneur study also delayed data collection for the consumer study. Fortunately, the additional time allowed me to engage with and secure approval to use the Black Wine Lovers Group, a dedicated 3,000-member consumer community on Facebook to collect data.

To date, I have collected 80 Black wine consumer responses through the Black Vines Festival and the International Winemakers Summit.

The new targets for manuscript development and submission are August 2021 for the quantitative, survey research and January 2022 for the qualitative, interview research, which requires multiple review of more than 60 hours of interview media and transcriptions. I anticipate releasing a trade report in summer 2021.

C) Objectives in progress

- *Study of Black wine entrepreneurs* – Data analysis and manuscript development with co-authors McDowell Porter and Liz Thach.
 - A guest lecture presentation will be delivered at UC Davis College of Viticulture and Enology in May 2021.
 - A trade report will be published by June 2021.
 - As an outgrowth of
- *Study of Black wine consumers* – Instrument refinement with data collection planned for May 2021.
- *High impact student experiences* – Through my sabbatical research, I was able to engage the Black, woman-owned Vinings Wine Club to serve as a case, mentor and expert judge for Promotions Principles and Practices (MKTG 132). Students are learning about the wine industry and contemporary promotions planning through their team project.
- *Interdisciplinary scholarship at Fresno State* – Dr. Kristy Qun, an enology professor and Lyles Center Entrepreneurship Fellow, and I share a desire to intertwine marketing, entrepreneurship and winemaking scholarship.

Our plans include:

- Undergraduate student exchange experience, where student-peers provide “Wine 101” and “Marketing 101” workshops to introduce both groups basic concepts and theories.
- “Pay it Forward” speaker session on wine, business and diversity with Mendy Laval / Lyles Center for Entrepreneurship.
- Collaboration on wine, business and education research.
- *Ongoing collaboration with UC Davis* – Following the guest lecture, we will explore how we can further work together regarding research and academic initiatives.
- *Lodi Appellation Inclusion Collective (LAIC) Student Enrichment Experiences*– As a LAIC board committee member, I will support initiatives including enrichment experiences that invite undergraduate students and young professionals for an

immersive five-day visit tailored to their interests (e.g., wine-making, marketing, distribution, etc.)

- *Partnership with Uncorked and Cultured media and lifestyle brand* – Currently collaborating on a social media campaign and other projects to bring awareness to Black wine contributors and provide a more inclusive wine lifestyle for under-represented groups:
 - Developed the [Sip Consciously](#) directory of BIPOC wine businesses based upon our shared data collection.
 - Partnership on Black wine consumer data collection through the [International Winemakers Summit](#) featuring Black winemakers.

D) Anticipated Outcomes

The sabbatical experience and the profound interest in and support of my research into diversity within the wine industry was extraordinarily rewarding. While the global pandemic wrought astounding losses in lives and livelihoods, it simultaneously provided a unique context within which to explore subjects' experiences.

Further, the unforeseen marketplace intersection of George Floyd's death, racial justice protests and a renewed "Buy Black" movement created an explosion of resources and dialogue regarding inclusion in the wine world and beyond.

In the near future, the following outcomes are expected:

- **Multiple journal and trade publications** regarding diversity in wine, entrepreneur motivations, and the effects of COVID-19 and race on Black wine entrepreneurs, among other topics. Ultimately, a book summarizing the research may be developed.
- Media coverage regarding this original and groundbreaking research will benefit Fresno State and its business and wine programs. This will support **student success**, and industry inclusion goals, by bringing awareness to students of all backgrounds about the opportunities in wine and business. Further, there are possibilities for **interdisciplinary and intercollegiate collaboration** and new course development.
- Ongoing **mentorship** by esteemed scholars, including Dr. Liz Thach, Sonoma State professor and the first woman in California to become a Master of Wine (MW), as well as experienced wine business practitioners will provide entrée into new areas of research and pedagogy, novel experiences for students, and additional financial scholarship opportunities.

SABBATICAL APPLICATION

Monique L. Bell

Associate Professor of Marketing

Summary

I am requesting sabbatical leave for the fall semester of academic year 2020-21. During the leave, I will expand my research and scholarly focus on wine production and marketing by vintners of color. My principal research goal for the sabbatical period is to conduct interviews and collect data in preparation for a peer-reviewed journal article and, ultimately, a book on Black wine entrepreneurs and Black wine consumers. The contributions of Black entrepreneurs to the wine industry, along with studies of Black consumers of wine, are absent from the marketing literature (Hammond et. al, 2014). The sabbatical will provide me with time to conduct in-depth interviews both in-person with California-based enterprises and virtually with other U.S. and international vintners. The contributions of this research will be of interest to scholars in marketing and wine marketing, and to those in the general public with an interest in this emerging area for Black entrepreneurship.

Topics & Objectives

The primary objectives for the sabbatical leave include: 1) to review research on wine marketing in general, and Black wine marketers specifically, 2) to conduct in-depth interviews with Black wine marketers (both local and abroad), 3) to collect survey data among Black wine marketers as well as wine consumers, 4) to prepare a journal manuscript based upon my preliminary findings, and 5) to lay the groundwork for a book manuscript.

1. Terroir Noir: Diversity in Wine Entrepreneurship and Marketing

The significant contributions of Black/African-Americans are often overlooked in the historical record and contemporary examinations of business and other disciplines. With the proposed research project, I would like to explore and illuminate Black entrepreneurs within the wine industry. Organizations such as the African-American Vintners Association, the Black Cellar Club and the Black Vines Festival, provide opportunities for the growing minority to connect and collaborate. While small in number, Black wine entrepreneurs are pioneering in largely closed industry with vast potential.

There is very limited research on diversity within the wine industry – both from the perspective of producers and consumers. Wine studies in major marketing journals have thus far been limited to examinations of market orientation (Humphreys and Carpenter 2018), perceived brand authenticity (Beverland 2006), a proposed wine marketing mix (Festa et. al 2006), and netnographic research on self-identified wine-lovers on social media platforms (Cuomo et. al 2016). While Black producers and consumers are missing from scholarly and popular discussions about the industry, both populations present substantial growth potential, along with discussion of other ethnically-diverse contributors. The dearth of research provides fertile ground to identify novel insights and publish seminal work.

2. Tasting Progress: Understanding Black Wine Consumers

An incident in August 2015 that involved a Black women's book club being removed from the Napa Valley Wine Train for "laughing to loudly" highlights the problematic relationship between the wine industry and Black consumers (Mobley 2019). While African-American consumers account for \$1.2 trillion in annual spending, they are virtually invisible in wine marketing and often face prejudicial treatment while shopping for wine or engaging in wine tourism. A Wine Marketing Council segmentation study finds that Black consumers represent nine percent of wine consumers and seven percent of high-frequency wine consumers (2018). Despite these attractive figures, Black consumers are largely absent from targeted marketing. Additionally, wine consumption is often viewed and portrayed as a lifestyle or culture, which further excludes Black consumers – even those who have the wealth and education that are complementary to traditional wine enthusiasts.

In the proposed research, I seek to understand how Black consumers uniquely engage with wine culture and products through survey, focus group and field research. A number of targeted organizations and events have been created to provide entrée for Black consumers to feel welcome in this, often novel, consumer space (Hammond et. al 2014). The primary research questions that I seek to address among Black consumers of wine include: 1) What motivates their engagement in wine consumption and the wine-drinking "lifestyle"? 2) What benefits are experienced in targeted "Black" wine consumption experiences versus other experiences?, and 3) How can wine brands create culturally-relevant and authentic relationships with Black wine consumers?

Procedures for Completion of Objectives:

The objective of the research projects described above is to explore the wine industry through the lens of Black entrepreneurs/marketers as well as consumers. In order to advance this research stream, I will use the sabbatical period to collect and analyze new data and to prepare a journal article for submission.

Sabbatical Semester

1. **Data Collection:** The majority of leave period will be spent collecting data through in-depth interviews, focus groups, surveys and field research. The sabbatical period will allow me to contact wine entrepreneurs in-person and virtually to gather insights about their experiences, challenges and strategies. The proximity of Fresno to both Northern Californian vintners and production and to Southern Californian wine marketing and events provides ample opportunity to conduct research. Furthermore, the leave period will allow me to collect data from consumers on their motivations, behaviors and experiences. Additionally, I will review secondary data and relevant materials to support my research in this area.

2. **Writing:** The outcome of the sabbatical period will be an article submission to a peer-reviewed journal. As such, the leave period will include development of a competitive paper on this novel topic. I intend to analyze the results of the entrepreneur interviews and follow-up surveys to discover insights into Black vintners' unique experiences within the industry. Since this is a relatively new area of research, I will require the leave time to become deeply familiar with the industry and its nuances. I may enlist colleagues within the California State University system, as well as from external organizations, to support the writing of the manuscript. Therefore, the sabbatical leave time is vital.

Timeline for Completion of Objectives:

The work for this research stream will begin prior to the sabbatical period with my attendance at the *Western Business and Management International Research Conference* (Napa Valley, CA) in March 2020, and the *Association of African-American Vintners (AAAV) Annual Wine Symposium* (Forestville, CA) in June 2020. Additionally, I would conduct preliminary outreach to founders and vendors of Oakland-based *Black Vines*, the longest-standing black wine festival in the country, which occurs annually in February.

The sabbatical timeline is outlined below:

August 1 through September 30, 2020	<ol style="list-style-type: none"> 1. In-depth interviews for the wine entrepreneurship and marketing article (8 – 10 interviews). 2. Focus group and field research for consumer research (8 – 10 participants) 3. Analyze preliminary results of interview research.
October 1 – 31, 2020	<ol style="list-style-type: none"> 1. Write the literature review for the wine entrepreneurship and marketing article. 2. Develop and distribute survey for consumer research.
November 1 – 30, 2020	<ol style="list-style-type: none"> 1. Conduct follow-up research with wine entrepreneurs and marketers. 2. Write the data analysis, methodology and other portions of the wine entrepreneurship and marketing article.
December 1 – 31, 2020	<ol style="list-style-type: none"> 1. Complete the wine entrepreneurship and marketing article and submit for publication. 2. Analyze the consumer data for future publication.

Section II. Benefits to the Faculty Member

I will benefit from the sabbatical leave by further extending my research agenda. The leave will provide the time for me to gather new data, submit a journal article, and develop relationships with relevant professionals in the wine industry. The ability to focus on my research will enable me to contribute to the marketing discipline and Black entrepreneurship studies. Ultimately, the sabbatical period will enhance my scholarship, contribute to a book proposal, and support my goal of becoming a full professor in the near future.

I plan to use the sabbatical period to conduct research that is both personally meaningful and relevant to the marketing discipline. I have begun exploring wine marketing in general; however, the leave will allow me to further enhance my expertise and focus more discretely on entrepreneurs and consumers of color. The leave period will allow me to deeply concentrate on the important research questions of how Black vintners are finding (or making) their place in the wine industry, and how Black wine consumers uniquely engage with the wine marketplace. Within the sabbatical period, I will develop at least one article manuscript. The sabbatical will also allow me the opportunity to begin developing a book proposal, which will be a longer-term research project.

The proposed research agenda will strengthen my knowledge in a scholarly area of particular importance to the Central Valley and the university. Exploring wine entrepreneurship, marketing and consumption will enhance my contributions to the Department of Marketing and Logistics curricula. Exploration in this area opens a broad stream of research potential, including research into wine marketing communications, tourism and strategy. Additionally, students will benefit from the opportunity to examine expanded areas of research through the network of professional and scholarly experts that I will engage. This network will also provide opportunities for exclusive presentations and learning experiences.

Section III. Benefits to the University

The development of my research agenda will contribute to the existing publication record of the Department of Marketing and Logistics and the Craig School of Business. Additionally, it will support two of the university's strategic priorities:

Enhanced Teaching and Learning – The sabbatical period will allow me to devote my full attention to understanding an industry that is vital to the Central Valley and other California regions. By deeply exploring the wine industry, I gain expertise and establish connections in a field that holds broad potential for Department of Marketing and Logistics majors. I will be prepared to deliver focused and contemporary curriculum on wine marketing and entrepreneurship, as well as in-depth insights on Black consumers. Further, there are likely to be opportunities for interdisciplinary scholarship with the Department of Viticulture and Enology and the Lyles Center for Innovation and Entrepreneurship.

My past selection as a visiting professor fellow in the Advertising Education Foundation allowed me to experience contemporary marketing on-site at the Leo Burnett USA agency in Chicago, IL. Despite the short two-week period, I continue to embed my promotions course with insights, tactics and anecdotes from that visit. Furthermore, Leo Burnett agency professionals continue to join my class for virtual lectures.

Campus-Community Connections – As noted earlier, there is a dearth of research on Black vintners' contributions to the wine industry. Additionally, scholarship is just beginning to emerge on Black wine consumers' behavior in the marketplace. The advancement of this research during the sabbatical period will support the creation of new relationships between the university and entrepreneurs within the region. I would like to use the university's partnerships with West Fresno Family Resource Center, Freedom School and the Sweet Potato Project as models for potential community collaborations. Further, as the university makes a concerted effort to create a successful pipeline of Black students, faculty and staff, ongoing scholarship in this area provides a unique appeal to potential candidates.

Further, research in the area of Black entrepreneurship and consumer behavior aligns with the university's values:

Discovery – The study of Black wine entrepreneurs and consumers is a personal passion that began for me when I discovered the annual Black Vines festival in Oakland, CA. Like many consumers, I was unaware that Black winemakers existed. I would like to make students of all backgrounds aware of the career potential within the wine industry as well as the economic potential of Black consumers.

Diversity – The research will illuminate additional professional and scholarship opportunities, and it will support inclusiveness for entrepreneurs and consumers who have often been overlooked by the wine industry.

Distinction – This research will support the university's desire to boldly explore a unique segment's contributions to the fabric of California's economic heritage and future.

Section IV. Previous Leaves

I have not received any previous leaves.

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