



SYLLABUS

MKTG 410: WINE MARKETING MANAGEMENT

Instructor: Roger Rutan

Language of Instruction: English

UO Credits: 4

Contact hours: 40

SIENA, ITALY

COURSE DESCRIPTION

For centuries, wine has been described as a function of three factors: soil, climate, and vintner's skill. Today a fourth dimension must be added: marketing. How a wine is marketed is now as fundamental to a winery's success as viticulture. The global wine marketplace continues to undergo dramatic shifts in consumer trends, pricing, distribution strategies, and winemaking itself. Today's wine marketing has to be smart, efficient, and focused.

Wine Marketing Management will provide students with a deep understanding of every aspect of real world wine marketing management. This course will teach students the unique aspects and attributes of the wine industry and how that drives marketing planning and decision making. The course begins with learning to understand the wine marketplace and the keys to success in today's saturated market. Students will learn how to evaluate customers and wine markets, ensuring that their marketing strategies will resonate with those customers and will get the desired results. As it relates to the wine industry, students will learn how to develop and apply product strategy, supply chain management practices, pricing strategies, and e commerce strategies. The development of a marketing plan for a winery will bring course content together. This project will be as close to real life as students will experience in their entire college career.

COURSE LEARNING OBJECTIVES

The objective of this course is to provide students with a working knowledge on how to develop, apply, and evaluate every aspect of wine marketing in real world scenarios. Understanding the unique attributes of the wine marketplace is where the course begins, with a focus on the American wine market and how Italian wineries can succeed in this very competitive environment. Students will learn the "language of wine marketing" used by practicing wine marketing managers. By the end of the course, students will have a solid understanding of the major decision areas under a wine marketer's responsibility. This includes the interrelationships of those decision areas, and how to apply them to gain competitive advantage.

COURSE CONTENT

Upon completion of this course, students will be able to:

- Understand the research process for wine consumers
- Understand the strategic positioning process for wine brands
- Create, position and enhance the value of wine brands
- Understand and know how to manage wine in the three tier system in America
- Manage every aspect of the supply chain for Italian and American wineries
- Develop pricing strategies for every element of the wine supply chain
- Identify sales strategies best suited and most effective for any given winery
- Utilize every component of e-commerce to reach target customers
- Understand compliance with legal and regulatory issues related to the sale of wine
- Understand the most effective promotion methods used in the wine industry
- How to develop impactful wine packaging and labeling
- Understand key factors in the global wine marketplace
- Understand the ethical implications of wine marketing decisions

INSTRUCTIONAL METHODOLOGY

Course Organization

Classes will consist of lectures, videos and class discussions. In addition, student presentations on assigned reading topics and a group project will challenge students to apply marketing concepts to actual wine marketing situations. The course is interactive. Students are encouraged to ask questions and actively participate. Given this, advanced class preparation is critical. Much of class time will be dedicated to discussing the assigned reading.

Approach

This course offers students a very special opportunity to learn about wine marketing management by combining it with the heritage and history of the Italian wine business. Numerous excursions to nearby wineries and historic sites will enrich student's learning experience. Students should think of this class as a cultural and business immersion.

Class Participation and Professionalism

Participation includes class attendance, reading assigned materials in advance, overall preparation for class, and actively contributing their thoughts and personal experiences during class. Class will start promptly at the designated time. Students are expected to be **on time and attend all classes**. Intelligent participation will require you to have read and studied all assignments for that day.

Preparation, professionalism, and mutual respect are all important elements of your Siena experience. Professional behavior is expected at all times, both in class and especially on excursions. While in Italy, students should think of themselves as American Ambassadors. Everything they say and do should reflect well on themselves, America, and the GEO program. Right along with that is respect for the Italian culture and way of life.

Absences

While students are here in Siena for the full Italy experience, attendance in class and program excursions is required. If students have two unexcused absences, their earned grade will be reduced by one letter. Additional unexcused absences will result in the same full letter grade reduction. Excused absences will be granted for health and medical reasons, as well as family emergencies, but that's it.

GRADING

Student grades will be based on several components. Rubrics for each of these grading areas will be provided on arrival in Siena.

Class Participation (200 Points)

Class attendance, advance reading of homework assignments, and contribution to class discussions all contribute to a student's individual participation score.

We are fortunate to be visiting a number of wineries and other places such as Florence. These events are an important part of student's learning experience. Points will be earned for active participation during these excursions, professional behavior, and a student's ability to **absorb and utilize** information provided during these site visits. Much of what students need to know to develop their winery marketing plan will come from these excursions.

Weekly Quizzes (25 Points Each, 150 Total)

The last class of weeks 1 – 6 will include a quiz covering the subject matter of that week, and that week only. In addition to assessing their performance in the class, these quizzes will give students and the instructor a tool to gauge student performance as the course progresses.

Wine Marketing Management Applied - Presentations (75 Points Each, 150 Total)

Every student team will be tasked to do two oral presentations on an assigned wine marketing management topic that require them to apply what they have learned to a real world, real time wine opportunity or challenge. Round 1 will be topics of a general nature. Round 2 will challenge students to dig deeper into what they have learned in class. Presentation assignments will be given to teams during week 1.

Team Marketing Plan Design (100 Points)

The first step in the winery marketing planning process is to design the roadmap of the team's plan. An outline of what this entails will be provided. Your instructor will work closely with teams on this very important first step

Team Marketing Plan Development (150 Points)

Students will develop a marketing plan with their team for an assigned winery. Students will be provided with a standard marketing plan outline. Each team's proposed plan will be evaluated by the instructor. Any needed changes will be made before the team can move forward.

Team Marketing Plan Presentation (250 Points)

Each student team will present their marketing plan for their assigned winery in PowerPoint format. All students and representatives from their assigned winery will be in attendance. These presentations will put students in the international spotlight. The quality of their plan and presentation must reflect well on themselves and the GEO program. Business casual dress is expected of all students during their marketing plan presentations so pack accordingly.

Grade “Boost” Credit – Tasting Notes

Students can earn a grade “boost” for sharing with the class, in writing and/or orally, their wine tasting notes from any Italian wine they have tasted since their arrival in Siena. A grade “boost” is where a student’s final grade is close but not all the way to the next level up, just needing a “boost”. A wine tasting note form will be provided, the same one used by wine professionals.

GRADING SUMMARY

INDIVIDUAL WORK:	POINTS
Participation (all inclusive)	200 points
6 Weekly quizzes – 25 points each	150 points
2 WMM Applied Presentations	150 points
Grade “Boost” Credit – Tasting Notes	Grade “boost”
TEAM PROJECTS:	
Winery Marketing Plan Design	100 points
Winery Marketing Plan Development	150 points
Winery Marketing Plan Presentation	250 points
TOTAL	1000 points

COURSE MATERIALS

Required Book

Wine Marketing & Sales, 3rd. Edition, Wagner, Olsen, and Thatch, 2017. Available in digital and hardback form. To access the book, use this link:
<http://www.uoduckstore.com/GEOSAS>.

Recommended Book (not required)

Chianti Classico, The Search for Tuscany’s Noblest Wine, Bill Nesto and Frances Di Savino, 2017. Available on Amazon.

Reading Assignments

Wine related reading assignments for every class are listed in the class schedule. They will be posted on a shared site. It’s critical students read these articles in advance as that will be the focus of class discussion.

Communicating with the Instructor

Your instructor is available to you at all times and for whatever reason. Students can email him at rutan@uoregon.edu. He will typically be at the GEO center before, between and after classes. Don’t ever hesitate to contact him if you have any questions or concerns or if you’d just like to visit.

COURSE OUTLINE AND CLASS SCHEDULE

Instructor's Note

The wine marketplace worldwide is a rapidly changing landscape. Any wine marketing management class like this must rely on current data and information from industry publications, news services, and the like. Given this, the instructor will begin collecting reading assignments starting right after the first of 2019 and going right up to the time classes begin in Siena. The instructor subscribes to multiple daily, weekly, and monthly publications which will have the latest news and trends on just about every topic in this class schedule. Annual consumption, demographic, and other data from the previous year (2018) is typically available in February.

The reading assignments shown in this class schedule reflect the kind articles and information that will be integrated into each class.

This approach supports and compliments this class being a real world experience for students.

This course outline and class schedule does not reflect many activities yet to be determined and scheduled. Here are some:

- **National holiday date(s), if any. There is usually one around the Palio.**
- **Six (6) winery excursions.**
- **Non-winery excursions.**
- **Wine appreciation classes.**
- **Enrollment is forecasted to be 24 students. Student teams functions best when they have no more than four (4) students. This means six (6) student teams.**
- **In the past, students were given one three-day weekend.**
- **Wine Marketing Management (WMM) Applied presentation need to be scheduled.**
- **And so on.**

Despite the many activities yet to be decided on and scheduled, the actual content for the course will be very close to what is shown here.

COURSE OUTLINE AND CLASS SCHEDULE

Week 1	Topics and Activities	
6/24	Course Overview Wine Marketing Management	Class 1
	Reading Assignments: <ul style="list-style-type: none">• Chapter 1 – Textbook - Wine Marketing & Sales	
6/25	The Global Wine Marketplace	Class 2
	Reading Assignments; <ul style="list-style-type: none">• Top 9 Trends in Wine• Wine Market Trends• 2018 Wine shipments Up• Top End Wines• IBIS Worldwide Report - 2018	
6/26	America’s Wine Market: An Overview	Class 3
	Reading Assignments: <ul style="list-style-type: none">• Silicon Valley Bank (SVB) – 2019 Wine Forecast Summary• SVB – Shifting Wine Consumers• Top US Wineries• SVB – Bulk Wine & Imports • Marketing Plan teams formed, initial meeting• Winery assignments made• Wine Marketing Management (WMM) Applied presentations handed out	
6/27	America’s Wine Market: What the Data Tells Us	Class 4
	Reading Assignments: <ul style="list-style-type: none">• Chapter 2• Wine Market Council Annual Report	
6/28	Marketing Italian Wine in America: Challenges and Opportunities	Class 5
	Reading Assignments: <ul style="list-style-type: none">• Marketing Wine from Lesser known Regions• Growth of Italian Wine in America• Italian Wine Looks Beyond Chianti• Casa Prosecco• Soave Consortium• Wall Street journal – Other Italian Whites	
	Quiz 1	

COURSE OUTLINE AND CLASS SCHEDULE

Week 2	Topics and Activities	
7/1	National Holiday (?)	
7/2	Day of the Palio	
7/3	Understanding Terroir	Class 6
	Reading Assignments: <ul style="list-style-type: none">• Hugh Johnson's Wine Atlas• AOC, DOC, and Other Regional Wine Designations	
7/4	Italian Wine: A Primer	Class 7
	Reading Assignment: <ul style="list-style-type: none">• Italian Wine Facts – a Summary	
7/5	Climate Change: Impacts on Grape Growing In Italy	Class 8
	Reading Assignments: <ul style="list-style-type: none">• Chapter 8• Wine Industry Focuses on Sustainability• King Estate & Demeter• Washing Post article – Global Warming Impacts Italian Grape Harvest	
	Quiz 2	

COURSE OUTLINE AND CLASS SCHEDULE

Week 3 Topics and Activities

7/8	Wine Branding & Positioning	Class 9
	Reading Assignments: <ul style="list-style-type: none">• Chapter 3• Top Wine Brands• WSWA Branding• Luxury Product Branding• Constellation Buys Brands	
7/9	Wine Packaging & Label Design	Class 10
	Reading Assignments: <ul style="list-style-type: none">• Chapters 5 & 6• Bota Box• Canned wine• What Makes a Good Wine Label	
7/10	Workshop: It's All About the Brand!	Class 11
	Reading Assignments: <ul style="list-style-type: none">• Case studies	
7/11	Trade Marketing: A Critical Wine Marketing Management Tool	Class 12
	Reading Assignments: <ul style="list-style-type: none">• King Estate Trade Marketing Tools Quiz 3	
7/12	Excursion to Florence	

COURSE OUTLINE AND CLASS SCHEDULE

Week 4 Topics and Activities

7/15 **Supply Chain Management:
Three Avenues to Sales** **Class 13**

Reading Assignments:

- Chapter 9
- Wine Industry Focuses on Sustainability
- Empathy for Wine Consumers
- Hand Selling Wine

7/16 **Supply Chain Management:
Selecting, Managing, and Motivating Importers** **Class 14**

Reading Assignments:

- Chapter 10
- SVB – Restaurant Sales
- Great Wine Service at Restaurants
- 10 Trends – Italian Wine in US Restaurants

7/17 **Supply Chain Management:
Choosing, Managing, and Motivating Distributors** **Class 15**

Reading Assignment:

- Chapter 15 - Digital Marketing & Social Media
- Southern Glaser – Wine Education for Distributors

7/18 **Supply Chain Management:
Selling Wine to Retailers** **Class 16**

Reading Assignment:

- Chapter 11
- Hand Selling Wine

7/19 **Supply Chain Management:
Selling Wine Restaurants** **Class 17**

Reading Assignment:

- Chapter 11

Quiz 4

COURSE OUTLINE AND CLASS SCHEDULE

Week 5 Topics and Activities

7/22	Wine Advertising & Public Relations	Class 18
	Reading Assignments: <ul style="list-style-type: none">• Chapter 13• Tasting Room Survey	
7/23	Digital Marketing & Social Media In the Wine Industry	Class 19
	Reading Assignments: <ul style="list-style-type: none">• Chapter 15• Wine Import Impacts• Gallo Expands Italian Portfolio	
7/24	Direct to Consumer Sales Wine 3.0	Class 20
	Reading Assignment: <ul style="list-style-type: none">• Chapter 12 Marketing Plan Presentation Prep	
7/25	Capitalizing on Wine Tourism	Class 21
	Reading Assignment: <ul style="list-style-type: none">• Chapter 14	
7/26	Building an Effective Tasting Room	Class 22
	Reading Assignment: <ul style="list-style-type: none">• Chapter 13 Quiz 5	

COURSE CONTENT AND CLASS SCHEDULE

Week 6 Topics and Activities

7/29	Strategic Alliances: The New Frontier	Class 23
7/30	Marketing Plan Workshop	Class 24
7/31	Consolidation in the Wine Industry: Challenges and Opportunities	Class 25
8/1	Repositioning & Turnarounds	Class 26
	Reading Assignment: <ul style="list-style-type: none">• Chapter 17	
8/2	TBD	Class 27
	Quiz 6	

Week 7 Topics and Activities

8/5	TBD	Class 28
8/6	Course Summary: WMM User Guide & Keys to Success	Class 29
8/7	Marketing Plan Workshop	Class 30
8/8	Marketing Plan Workshop	Class 31
8/9	Marketing Plan Presentations	Class 32
	Farewell Dinner	

TEAM PROJECT

CREATING A MARKETING PLAN FOR A WINERY

Student teams will create a marketing plan for their assigned winery. Teams will be formed in week 1 and winery assignments handed out at that time.

These winery marketing plans will be prepared in three phases

- Marketing plan design
- Marketing plan development (preparation and writing)
- Team members present their plan to winery representatives and class members on the last day of class.

A Real World Experience

This marketing plan development process mirrors what is done in real world wine marketing management. Working with your instructor, each step along the way is an opportunity to evaluate and enhance the plan. Each step is also an opportunity to seek out new ideas, think about what is missing, and if the plan development process is still on track to accomplish the winery's marketing objectives. Each team will make changes, modifications and improvements throughout this process, and get instructor approval, before they move forward. This ensures that when they take the stage to present their plan, it has been thoroughly vetted and is a world class plan, ready to be implemented.

Your instructor and these wineries are expecting marketing plans that are professionally done, thorough, well-researched, creative, and ones that **could be actually implemented.** Your team's marketing plan needs to propose creative ideas and marketing strategies that are focused directly on the needs of your assigned winery. This project is as close to a real world experience as students will experience in college

Plan Objective

The overall objective of **every plan** is to help each winery **grow their business/sales** and **their presence in the US marketplace.**

Winery Visits

General information on Italian wine will come from a number of sources such as reading assignments, class discussion, and winery visits. Learning about your assigned winery and its unique marketing needs will come from visiting it. The student team assigned to each winery will have one-on-one time with their winery's management during that winery tour. Preparation for this meeting is critical.

Phase 1: Marketing Plan Design – Due 7/3

Teams will have only a short period of time to do a preliminary assessment of their winery. Teams will have to make initial assumptions to complete this important first step, ones that could be revised as their process moves along. The plan design must include the following elements:

- A team statement on what they have learned as the winery's primary **marketing objectives**.
- Initial ideas on marketing opportunities and/or strategies to achieve the winery's objectives.
- A work plan that identifies what kind of information is needed, what the team plans to do with this information, and a design on how the team will develop its plan.

Students will work closely with your instructor through this important first step. The plan design document should be one to two pages. Instructors will offer any modifications and after any changes, will give approval to move forward.

Phase 2: Marketing Plan Development – Due 7/22

Working from the plan design, teams will develop and write marketing plans for their winery.

Teams will use the marketing plan outline provided them as a general guide for plan content and organization. The instructor will again work closely with each team during this step in the process. Any needed changes will be made at this time before the team will be given approval to move forward.

Phase 3: Marketing Plan Presentations – August 9

Each student team will present their marketing plan to winery representatives and the class. PowerPoint format will be used. Imbedded video will enhance your plan presentation and impact. Business casual dress is expected of all students during their marketing plan presentations so pack accordingly.

Peer Evaluations

Students will be required to fill out a confidential peer evaluation for each team member using a form to be provided. Student grades could be impacted, either way, based on this feedback.

Charles H. Lundquist College of Business

CODE OF PROFESSIONAL BUSINESS CONDUCT

A Statement of Values

The Lundquist College of Business learning community is committed to a set of core values that guide our interactions with one another. Our values are as important within our LCB community as within the business community. Our values help define both how we aspire to act and what it means to be a business professional.

INTEGRITY

Members of our community act with integrity and honesty. These qualities are essential in providing a basis for trust and go to the core of what is expected from business professionals.

RESPECT

Our community conveys respect for the dignity of all people. Our relationships are based on mutual respect. Differences of opinion are discussed openly and civilly. These discussions focus on issues and are presented in a courteous manner. We are sensitive to the impacts of both our words and actions on others.

OPENNESS

We encourage all members of our community to exchange ideas freely within the bounds of reasonable behavior. We recognize that learning requires an open environment.

RESPONSIBILITY

We act publicly and accept responsibility for our actions. We understand that the community will keep us accountable for our dealings. We deliver on the commitments and promises we make to others.

TEAMWORK

Our community is stronger when we work as a team. We foster attitudes encouraging members of the community to give and receive constructive criticism, and develop creative solutions to challenges.

Academic Misconduct

The University Student Conduct Code (available at conduct.uoregon.edu) defines academic misconduct. Students are prohibited from committing or attempting to commit any act that constitutes academic misconduct. By way of example, students should not give or receive (or attempt to give or receive) unauthorized help on assignments or examinations without express permission from the instructor. Students should properly acknowledge and document all sources of information (e.g. quotations, paraphrases, ideas) and use only the sources and resources authorized by the instructor. If there is any question about whether an act constitutes academic misconduct, it is the students' obligation to clarify the question with the instructor before committing or attempting to commit the act. Additional information about a common form of academic misconduct, plagiarism, is available at researchguides.uoregon.edu/citing-plagiarism.

Prohibited Discrimination and Harassment Reporting

Any student who has experienced sexual assault, relationship violence, sex or gender-based bullying, stalking, and/or sexual harassment may seek resources and help at safe.uoregon.edu. To

get help by phone, a student can also call either the UO's 24-hour hotline at 541-346-7244 [SAFE], or the non-confidential Title IX Coordinator at 541-346-8136. From the SAFE website, students may also connect to Callisto, a confidential, third-party reporting site that is not a part of the university.

Students experiencing any other form of prohibited discrimination or harassment can find information at respect.uoregon.edu or aaeo.uoregon.edu or contact the non-confidential AAEO office at 541-346-3123 or the Dean of Students Office at 541-346-3216 for help. As UO policy has different reporting requirements based on the nature of the reported harassment or discrimination, additional information about reporting requirements for discrimination or harassment unrelated to sexual assault, relationship violence, sex or gender based bullying, stalking, and/or sexual harassment is available at [Discrimination & Harassment](#).

The instructor of this class, as a Student Directed Employee, will direct students who disclose sexual harassment or sexual violence to resources that can help and will only report the information shared to the university administration when the student requests that the information be reported (unless someone is in imminent risk of serious harm or a minor). The instructor of this class is required to report all other forms of prohibited discrimination or harassment to the university administration.

Specific details about confidentiality of information and reporting obligations of employees can be found at titleix.uoregon.edu.

Mandatory Reporting of Child Abuse

UO employees, including faculty, staff, and GEs, are mandatory reporters of child abuse. This statement is to advise you that your disclosure of information about child abuse to a UO employee may trigger the UO employee's duty to report that information to the designated authorities. Please refer to the following links for detailed information about mandatory reporting: [Mandatory Reporting of Child Abuse and Neglect](#).

Students with Disabilities

The University of Oregon is working to create inclusive learning environments. Please notify me if there are aspects of the instruction or design of this course that result in disability-related barriers to your participation. You are also encouraged to contact the Accessible Education Center in 360 Oregon Hall at 541-346-1155 or uoaec@uoregon.edu.