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Can a Food Retail Company Achieve Fast Growth in the Social  
Acceleration Context while Staying True to a Slow Food Brand  
Ideology? Evidence from Eataly's Case

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**CAN A FOOD RETAIL COMPANY ACHIEVE  
FAST GROWTH IN THE SOCIAL  
ACCELERATION CONTEXT WHILE STAYING  
TRUE TO A SLOW FOOD BRAND IDEOLOGY?  
EVIDENCE FROM EATALY'S CASE**

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Research Director: Luca M. VISCONTI

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## RESUME

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Cette étude portera sur le cas d'Eataly, une entreprise alimentaire italienne qui réalise une croissance et un succès rapides et se développe à l'échelle internationale. L'un des piliers du succès d'Eataly est l'adoption de l'idéologie de la marque fondée sur l'éthique du Mouvement Slow Food. La philosophie Slow Food peut être interprétée comme une réaction à l'accélération sociale, un phénomène diffus individué par la littérature sociologique récente. La «lenteur» préconisée par Slow Food semble être en contraste avec la croissance rapide d'Eataly. Par conséquent, il sera étudié s'il est possible de réaliser une croissance rapide dans le contexte de l'accélération sociale tout en restant fidèle à l'idéologie de la marque Slow Food. La marque Eataly sera analysée, certains des aspects les plus contradictoires seront présentés ainsi que les résultats des questionnaires effectués. On dira que la contradiction entre l'idéologie et la croissance commerciale existe et que la position éthique n'est pas le facteur le plus important de la croissance.

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## ABSTRACT

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This study will focus on the case of Eataly, an Italian food company that is achieving fast growth and success and expanding internationally. One of the pillars of Eataly's success is the adoption of the ethically grounded brand ideology of the Slow Food Movement. The Slow Food philosophy can be interpreted as a reaction to social acceleration, a diffused phenomenon individuated by recent sociological literature. The "slowness" advocated by Slow Food seem to be in contrast with Eataly's fast growth, therefore it will be investigated whether it is possible to achieve fast growth in the context of social acceleration while staying true to the Slow Food brand ideology. Eataly's brand will be analyzed, some of the most contradictory aspects will be presented as well as the results of the questionnaires conducted. It will be argued that the contradiction between the ideology and the commercial growth exists and that the ethical stance is not the most important driver of growth.

### Keywords

Brand Management, Brand Ideology, Food Retail, Eataly, Social Acceleration, Slow Food, Brand Strategy

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*Grazie.*

*To my family, who has always supported and encouraged me with amazing endurance.*

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## SECTION 1. THEORETICAL FRAMEWORK AND REASONS FOR RESEARCH

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### INTRODUCTION

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Eataly is an Italian food company that is bringing innovation in the world of food retail with its new format that is at the same time supermarket, restaurant and school. The company is tasting success by growing incredibly fast in the Italian and international market, thanks to its strong brand associated with tradition and high quality. The strength of the brand was built on ideological premises: Eataly embraced from the very beginning the Slow Food philosophy. However, the dualism of fast commercial growth and ethical ideology might seem inherently contradictory. Therefore, one of the purposes of this research was to further investigate the matter.

The Slow Food philosophy advocates consumption of “clean, fair and good” food and a return to food enjoyment and conviviality. The movement was born as a reaction to fight the advent of fast food and the so-called “fast life”. The philosophy can be thus interpreted as a reaction to a phenomenon which is described as “social acceleration” in recent sociological literature.

Social acceleration is the speeding up of technological change, social change and the pace of life that can be observed in contemporary society. This leads to a feeling of lack of time, loss of identity and cultural loss, as well as a continuous pressure to evolve and to be flexible.

Eataly success can be attributed to various factors, for example the wise use of experiential marketing, the uniqueness of the offering, the great use of storytelling, the “eat, shop and learn” brand contract that is translated in an innovative format and the response to the demand for ethical behavior by adopting the Slow Food ideology. This last point, however, might be object of discussion. Specifically, the capability of Eataly to maintain coherence with the ethical implications of the ideology might be questioned. The fast growth, the ambiguous relationship with Slow Food and the various contradictions Eataly manifests led to the question: can a food retail company achieve fast grow in the context of social acceleration while remaining true to a Slow Food brand ideology?

This is the question to be answered within this work. In section 1, an overview of the existing literature on Eataly’s case will be presented, as well as social acceleration, Slow Food and some brand-related definitions and frameworks of interest for the analysis. The

gap in the literature will be identified as well as some hypotheses to be tested. In section 2 Eataly's case study will be analyzed. Some context variables will be presented, as well as the history of the company. Eataly as a brand will then be analyzed and described. In section 3, discussion will be made on Eataly's most contradictory aspects and the results of some questionnaires conducted will be presented. These results will then be analyzed altogether to answer the initial question.

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## 1. LITERATURE REVIEW

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### 1.1 About Eataly

The case of Eataly has been presented many times in the literature, as it represents a unique example of innovation in food retail. Most researcher took a descriptive approach, praising Eataly for its merits in achieving the result it got in the recent year. The first analysis is probably the one presented by Sartorio (2008), whose book is centered around the figure of Eataly's founder Farinetti, whose entrepreneurial journey led from the electronics giant UniEuro to the birth of Eataly, with the collaboration of Slow Food's founder Carlo Petrini.

Eataly was able to achieve fast success by betting on the concept of "traditional innovation" (Venturini, 2010), where to innovate means to return to traditions. At Eataly, this innovation took the form of the integration of three different activities in a single food store, which becomes in this way different than a supermarket in a classic sense, as well as different than a traditional marketplace while at the same time being closer to the latter (Venturini, 2010; Billero, 2012). As pointed out by many researcher as well as by Eataly itself during an interview conducted, the strength of the company lies in allowing the customers to "eat, shop and learn" in the same place (Bertoldi, Giachino, & Stupino, 2015; Terenzio, 2015). Therefore Eataly's first store was born as a combination of retail areas, restaurants and zones devoted to education, where customers are given the opportunity to learn more about the products and the local producers behind them.

Another building block of Eataly's offering is to allow more people access to high quality food. As Farinetti observed, high quality food constitutes a niche market, as only 10% of the population consumes it consistently (Venturini, 2010; Sartorio, 2008). However, he was convinced that the difference in price between the high-quality offering and the standard/low quality one in the food sector is not as pronounced as in other sectors (e.g. fashion,

technology, automotive) and thus the target market he chose for Eataly is constituted by the other 90% of the population. The objective is to make high quality food available to everybody, a sort of “democracy of quality” (Massa & Testa, 2012) that goes together with the intent of educating the customers and thus spreading a (positive) food culture centered around quality.

High quality food usually means good food. The food proposed by Eataly is not only meant to be good, but also fair and clean. “Good, fair and clean” are the three pillars of the Slow Food movement, whose founder was a dear friend of Farinetti. Slow Food played an active role in co-founding Eataly and it is still an important partner when it comes to product and supplier selection. Therefore, the Slow Food philosophy is embedded in many of Eataly’s choices, and as per the analysis of Massa & Testa (2012) it ended up becoming the core of Eataly’s brand ideology, influencing many of the company’s brand decisions.

Slow Food is first and foremost a philosophy and thus it is free of commercial purposes, while Eataly is not. Therefore, evidence from the literature shows how Slow Food members sometimes perceive a low level of coherence between the ideology and the actual offering from Eataly (Montagnini & Sebastiani, 2013) and that the company and the movement are not always aligned in terms of choices that have been made (Sebastiani, Montagnini, & Dalli, 2013).

Another aspect that is often pointed out is the ability of Eataly to correctly leverage experiential marketing, thus creating unique and powerful customer experiences (Billero, 2012; Montagnini & Sebastiani, 2013). The company goes to great lengths to build the experience across the five dimensions of sense, feel, think, act and relate (Schmitt, 1999).

Eataly as a brand is analyzed both in the work of Bertoldi, Giachino & Stupino (2015), which determined that the brand is first and foremost associated to the activities of “eat” and “shop” while the “learn” aspect is still perceived as secondary, and in the work of Massa & Testa (2012), who point out how retailer brand ideology influences brand architecture decisions at Eataly.

## **1.2 Social Acceleration**

### ***1.2.1 The context of Social Acceleration***

Social Acceleration was theorized extensively in by Hartmut Rosa in his book, *Social Acceleration: a new theory of modernity*. Acceleration is thus territory of a lively debate in

recent sociology. We will try here to underline the fundamental aspects of the theory as presented in the literature.

Rosa connects the theory to the works of important philosophers and sociologists like Marx, Adorno, Benjamin, Marcuse, Habermas, Honneth (La Rosa, 2015) while at the same time proposing a new interpretation of their theories considering a new perspective: social acceleration. He observes how this phenomenon is fundamentally influencing modern and contemporary (post-modern) society. Modernization has been given many definitions by sociologists: a rationalization process (Weber, Habermas), functional differentiation (Durkheim, Luhmann), an individualization process (Simmel, Beck) or a process of objectification brought by capitalism (Marx) (Fazio, 2015). Rosa is moving two main pieces of criticism to these visions: firstly, he believes they see modernization as an excessively linear process when it is characterized by continuous breaks and ruptures instead, and secondly he identifies a vague ethnocentric tendency, meaning that they take western societies as models and generalize from there. To Rosa, acceleration constitutes a more universal explanation of modernity, as we live in an environment characterized by an invisible speed regimen.

According to this theory, the modern self is taken aback by the necessity of keeping up with the fast pace and thus has not the time to stop and think about its own identity or build real relationships. Therefore, as modernization is translated as the acceleration of some processes, it deals with the perception we have of space and time and drives change in the way individuals put themselves in relation with the modern society across these dimensions.

Social acceleration is a pervasive and hard to control phenomenon, which is impossible to stop and control as is underlying our society (Hsu & Elliot, *Social Acceleration Theory and the Self*, 2014).

### ***1.2.2 Space, time and speed***

Speed is present across dimensions of space and time (Rosa, 2013). In Lübbe philosophy we can find an example of acceleration in the phenomenon of museumification: this refers to the necessity of putting everything in the archives of history as soon as possible. This trend is not the expression of a new need of documenting, but a problematic manifestation of the need to render things obsolete, to innovate as fast as possible and continuously.

From a philosophical point of view, it is observed how the temporal dimension takes so much importance that we are bound to neglect the spatial one. In other words, we feel strangled by time constraints. According to Virilio (Astone, 2015) technical revolution in

transportation and communications led to two different movements: movements of people across the world and, in the case of communications, of the world getting closer to people. This process is leading to the strange immobility of humanity in front of the movement of inorganic things (among other things the frenetic circulation of products). This immobility is defined as “frenetic standstill” which refers to a concept of paralysis that characterizes modern society, as per observations in recent sociological literature (Kojève, Habermas, Gehlen).

### ***1.2.3 The three accelerations***

It's possible to distinguish three types of acceleration (Rosa, 2013; Astone, 2015; La Rosa, 2015; Fazio, 2015): technological acceleration, social change acceleration and life pace acceleration.

Technical and technological acceleration is characterized as rational and intentional and thus is easier to notice and measure. It is particularly visible in the communication, in the transportation and in the economic (production) sectors. Mobile phones are one example of technological acceleration as they create a network-effect (Hassan, 2010), changing people relationships by making them connected at any time in search for time efficiency and flexibility. This “anytime anywhere” property compresses space (Wajcman, 2008).

Social change acceleration deals with the increasing speed of social movements and innovation diffusion. Since the pace of technological innovations in a regimen of programmed obsolescence is incredibly fast, the knowledge required to be up-to-date keeps changing and people need to keep adapting and avoid lagging behind. Therefore, individuals keep changing jobs, partners in their relationship, skills and so on.

Life pace acceleration deals with “the increase of episodes of action and/or experience per unit of time as a result of a scarcity of time resources” (Rosa, 2013). According to Rosa we all try, in a way or another, to live faster, by increasing the number of experiences we want to have per unit of time, or by doing more things in less time. Behind this trend lies the feeling of lack of time, the fact that the sheer number of things we want to do increased so much that the time we earn thanks to technological innovation is not enough. Therefore, we try to do more things at the same time or to shorten or eliminate breaks.

### ***1.2.4 The acceleration circle and the drivers***

Rosa's analysis shows how the acceleration system is so strongly present that it has become “self-propelled” (Rosa, 2013), a self-reinforcing circle, like a turning wheel. Starting from

the acceleration of the pace of life, the need to accelerate and do more things at the same time can be detected. To satisfy this need people resort to the help of technologies, therefore driving technological acceleration, which destabilizes the previous balance and requires people to adapt, to change and to discover the new relational possibilities brought by technology (thus driving social change acceleration).

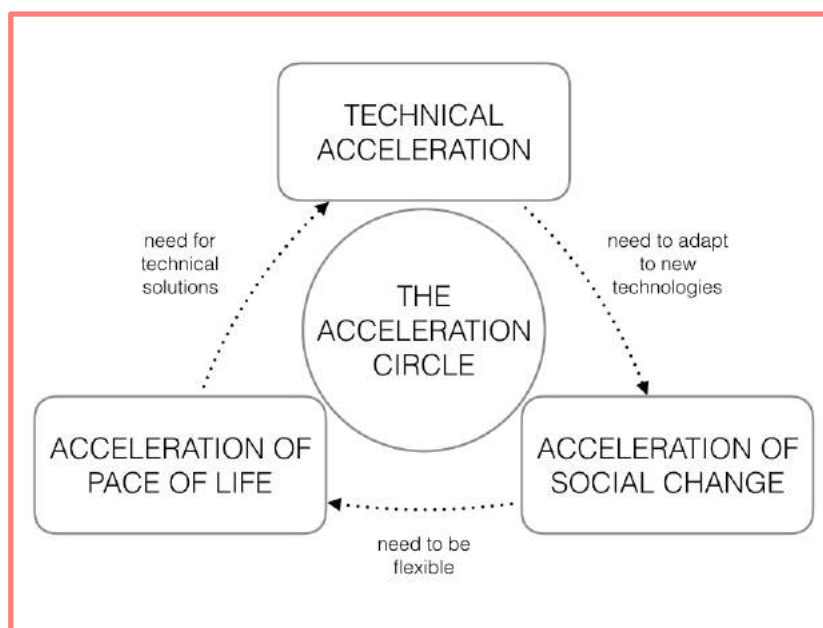


Figure 1: Acceleration circle - Source: rework from Rosa, 2013

The internal forces inside this self-propelled circle are not the only drivers of acceleration, there are also external variables that contributed to establish the need for more speed. Among the others, the following ones can be pointed out: the logic of competition, that pushes individuals to optimize their own performances by saving time, the cultural promise of a “life full of possibilities” to be fully lived and realized before death, through which a person perceives the fast pace as a way to take all the opportunities the world has to offer, and the labor division, made so that it is hard to take a break from fast paced activities.

### 1.2.5 Desynchronization

Desynchronization is what lies at the other extreme, what is left over from the acceleration, and takes the form of a set of unique problems that are still direct consequences of this phenomenon, like entire geographic areas that get left out the network of the accelerated time, individual episodes of depression when people can't keep up with the pace and thus “stop”, collective trends of unemployment due to lack of flexibility by people or systems,

or again a “cultural” deceleration due to the lack of time needed to generate new cultural content.

### **1.2.6 Further considerations**

Acceleration sprouts from the necessity of changing and becoming newer and better than the past, because the future is promised as better and full of innovations (La Rosa, 2015). However, if modern times were always characterized by an idea of autonomy and self-realization through this process of change to becoming better, we are now observing that in the new speed regimen autonomy must be sacrificed in the name of flexibility. A new form of alienation is thus born: being forced to do things that we don't wish to do. Acceleration makes it so some social practices no longer feel empowering to people who take part in them and therefore causes a loss of identity.

Social acceleration is now a central concept in recent social theory for the impact it has on post-modern society, although still dependent on the context in which it is analyzed (Hsu, 2014). However, despite the lively theoretical discussion around the topic, its empirical implications are still poorly understood (Wajcman, 2008), and in particular further analysis would be needed to understand the implications of this phenomenon outside the boundaries of sociology.

## **1.3 Slow Food Philosophy**

Slow Food is an international non-profit organization that promotes a socially and environmentally conscious position towards food, while at the same time wanting to preserve the pleasure that derives from it (Pietrykowski, 2004). At the very center of the movement stands the idea that food is not only a way to sustain the body and the metabolism, but also an important part of our identity (Fischler, 1988), therefore to preserve food means to preserve culture. For these reasons, Slow Food is an association whose purpose is the promotion and the protection of “good, clean and fair” food (Slow Food, 2012), where good is associated to taste and pleasure, clean to environmental concerns and fair to a more ethically and morally correct behavior towards small-scale producers.

The movement was born in Bra, a small town in northern Italy in the province of Cuneo, in December 1989, by an idea of Carlo Petrini. The original intent was to react to fast food restaurants like McDonald's, which were starting to spread alongside the idea of quick, fast and cheap meals. McDonald's was opening restaurants in the very center of Italian historical cities, like in Piazza di Spagna, Rome. This triggered the birth of Slow Food, a

sort of counter reaction, with the aim to save a patrimony of flavors, traditions, high quality food and wine. Fast food was interpreted as a symptom of a wider problem, the “Fast-Life” (Slow Food, 1989) that is changing habits and endangering people’s well-being and to which Slow Food wants to be a first answer.

Nowadays, the movement counts more than 100 000 members, operating in 160 countries and involving millions of people (Slow Food, 2017).

Members of Slow Food are particularly concerned that fast food will end up replacing local restaurants in their traditional forms, like trattorie and osterie that serve traditional dishes and celebrate local food, as we assist instead to the advancement of cheap and standardized food. A direct consequence of this phenomenon is a loss of culture and identity.

As the movement further developed, three main goals were identified: education of taste, defense of the right to conviviality and pleasure and preservation of agricultural products and methods that would otherwise disappear (the Ark of Taste).

The first objective, taste education, should start from childhood. The movement promotes taste and smell education as a way to approach cultural education. A practical declination of this commitment was the establishment of a university dedicated to “economy of gastronomy”. This university, whose formal denomination is University of Gastronomic Science, was created in Italy in 2004. The purpose is to train professional in the field that will become knowledge experts capable of shaping the future direction of the food economy and that will have the power to change recent food trends.

The second objective is related to the very adjective included in the movement name: “slow” as opposed to the insidious time-space compression we observe (Rosa, 2013). Since with technological advancement goods can be moved at a great speed across great distances, food is nowadays free from the constraints historically imposed by nature. This separates people and the agricultural dimension of food production, affecting resources allocation across producers as well, where small producers suffer from the competition of faraway large-scale producers. To oppose the speed trend, Slow Food promotes the pleasure of conviviality. Conviviality is reflected by the name given to the movement structure itself (convivium) to remind of a feast. The word can have multiple interpretations, as it can refer to a pleasurable moment of sharing and even to a more conscious relationship between producers and consumers, who become more active and responsible (as some sort of co-producers) (Slow Food, 2012-2016).



Conviviality is expressed by sitting around the table to enjoy the meal: this habit as some implication both in the way people enjoy food and in the way culture and knowledge is shared across people of different generations who take part to the meal. Therefore, the connection between culture and food is reinforced, as well as the risk of cultural loss when meals are not consumed in a traditional way. Slow Food observes how modern restaurant models are focused on serving as many customers as possible per unit of time in order to maximize turnover. For this reason, conviviality and pleasure are often sacrificed.

The third objective is to create the so called “Ark of Taste”. The purpose of the ark is the preservation of products and production process that would be otherwise bound to disappear in the current economic system. The Ark is the metaphor for the protection of endangered elements, whether they are farm breeds, products, regional specialties or restaurants that support local producers (Chrzan, 2004). The Ark initiative can therefore be seen as a challenge to the neutrality of the marketplace (Pietrykowski, 2004). This preservation of food takes place through the creation and promotion of some “slow” models of supply. The aim of the association is to create networks of supplier, composed by small-scale producers whose traditional production methods are too inefficient to keep up with modern marketplace logics. Therefore, Slow Food is trying to become an intermediary between chosen suppliers and consumers, ensuring the survival of the former with the cultural values they represent. In this sense, Eataly is the company that stepped forward as commercial intermediary between those producers and the mass market.

## **1.4 Brands: some frameworks and considerations**

### ***1.4.1 Brands and Brand Equity***

A definition of brand universally agreed upon has not been identified. According to a classic definition by the American marketing Association (1960), “*the brand is a name, a term, a sign, a symbol or any other characteristic that is intended to identify a seller’s goods or services, and to distinguish them from those provided by other sellers*”. This definition is now widely interpreted as reductive, as there are other functions associated to brands.

In particular, two groups of functions can be attributed to brands: consumer-oriented functions and brand-oriented functions (Bertoldi, Giachino, & Stupino, 2015). The second deal with legal safeguarding and the brand per se, while the first with consumer perception, which includes recognition, identification, personalization, interaction and ethical considerations.

Therefore, brand management can be translated in a process that deals with the positioning and the definition of the values of the brand, with the implementation of marketing programs coherent with the brand strategy and with the development of the so-called brand equity.

Although there are many possible interpretations of the concept of brand equity, one possible definition could be “*the set of associations and behavior on the part of a brand’s customers, channel members and parent corporation that permits the brand to earn greater volume or greater margins than it could without the brand name, and which gives the brand a strong, sustainable advantage, distinguishing it from competing firms*” (Marketing Science Institute).

Brand equity must be developed by establishing a clear positioning and planning the brand strategy accordingly. In the food sector the brand acquires immediately the function of providing information about the product to consumers, in a way that could decisively influence their decisions.

#### **1.4.2 Retailer Brand and Brand Architecture**

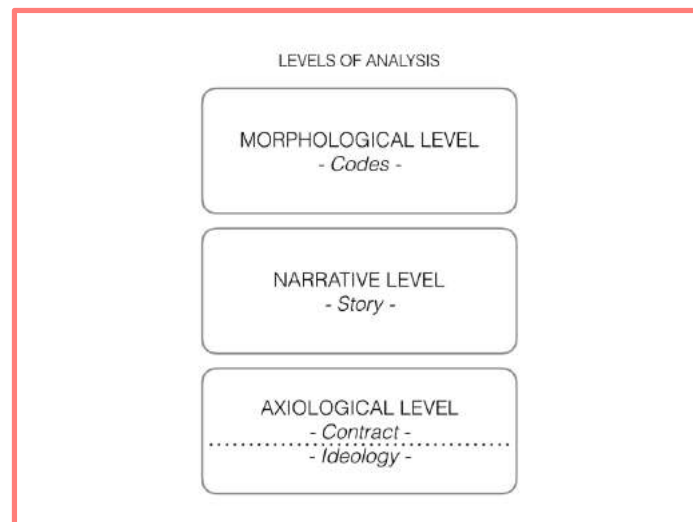
Retailers don’t have a product, or better their “product” is a recombination of products from other companies in a coherent environment. Thus, retailers can be defined as hybrid organizations (Burt & Sparks, 2002) and branding for retail presents a set of unique challenges. Specifically, retailers do not manufacture and market their own branded products, but rather perform a bundle of activities and services that generate value added for the customers (Massa & Testa, 2012). Branding in retail means immersing the customers in a context in order to make them understand what the store or the retail chain stands for, to communicate them particular values and meanings. This context can be defined as the retailer brand architecture, and encompasses various aspect as presented in a framework by Esbjerg and Bech-Larsen (2009). According to this framework, retailers’ brands are composed by two elements: product and process brand (Esbjerg & Bech-Larsen, 2009). The product brand refers to the assortment of products in their store and their respective brands, while process brand is associated to the experience the customers live from the moment they enter to when they exit the store. Both the product and the process brand have functional and symbolic attributes, where functional are the physical attributes while symbolic are those attributes that are uniquely determined in relation to their perception by customers.

	Retailer Process Brand	Retailer Product Brand
Functional aspects	Location Building Layout/décor Assortment Brands Space allocation, placement Visual, olfactory, aural and tactile dimensions Crowding	Product quality Packaging Visual, olfactory, aural, gustatory and tactile dimensions
Symbolic aspects	Store layout Pricing strategy Store name Slogans Logos Colors Employees Other customers	Product brand names Scope of retailer brands Prices Slogans Logos Colors

Table 1: Retailer brand architecture - Source: Esbjerg and Bech-Larsen, 2009

### 1.4.3 Morphology, Axiology, Narratology

Among the different ways that could be used to analyze a brand, another framework can be utilized (Visconti, 2016), which consists of three different levels of analysis. The first level of analysis is the Morphological level, which deals with what is shown, what is apparent, and entails the codes and symbols that are usually associated with the brand. A second level of analysis, more deep, is the Axiological level, which deals with the brand's contract with the customers and possibly with the ideology that stands behind it (which might or might not be present with different degrees of intensity). In the middle between the other two stands the Narrative level, in other words the stories the brand is telling to better communicate the brand contract to the customers by utilizing the set of codes and symbols that can be individuated on a morphological level. As everything else is first and foremost determined and coherent with the brand contract, the Axiological level should be the first one to be analyzed before moving to the other two.



*Figure 2: Brand analysis framework - Source: Visconti, 2016*

#### **1.4.4 Brand Contract**

A contract can be defined as per dictionary “a written or spoken agreement, especially one concerning employment, sales, or tenancy, that is intended to be enforceable by law” (Visconti, 2016). Even though a “brand contract” is not formally stipulated, more often than not brands state quite explicitly the nature of the agreement that they are willing to make with the customers, which goes beyond the simple purchase. As customers are quite sensitive to violations of the contract sometimes brand contracts go as far as becoming quasi-legally enforceable.

Having a clear contract for brands in the food sector is more important than that of other lines of business, because it impacts people’s health directly (Bertoldi, Giachino, & Stupino, 2015). As such, staying true to the contract is very important for guaranteeing a relationship of trust with the customer, and such a relationship can help attain a competitive edge over the competition.

#### **1.4.5 Brand Ideology and Ethical Consumption**

The expression “retailer brand ideology” is commonly used to define the integration of values, ideas, messages and beliefs employed by a retailer to define branding choices, which help create “a perfect place, rich in values, encouraging a type of ethically-grounded acquisition, where consumers find that purchasing and partaking they adhere to an ethical model that help them gain or regain morality” (Borghini, et al., 2009). There have been several recent studies seeking to identify ideologies’ role in branding, each focusing on specific areas including: retail advertising, themed brand stores and retail environment

(Massa & Testa, 2012). In recent years, providers of goods and services, and more specifically those in the food sector, have made a conscious shift in the employment of responsible and ethical commercial behaviors. However there has been little investigation into the role of ideology in large-scale food retailing: despite ideology being the focus of many alternative food networks, in regards to large-scale retail it almost always assumes minor importance (Venturini, 2010).

There is an increasing body of evidence in the literature that demonstrates how consumers are increasingly demanding ethical behavior by producers of goods and services, and ethically grounded brand ideologies represent a possible way to answer to this demand. As ethical consciousness spread among consumers, especially in developed countries, ethical branding could provide a company with competitive advantage (Massa & Testa, 2012).

#### ***1.4.6 Brands and the challenge of authenticity***

Recent trends in the markets and especially in the food sector are seeing companies struggling to position their brands as “authentic” emphasizing their ability to stay true to the values of the past, linked to territory and tradition and even true to their former selves as per the brands’ own stories. The focus is put on these elements with an apparent contradiction when it comes to meet the needs to the market quickly by following trends. As such, to be authentic or to be perceived as such brands must often downplay commercial motives (Beverland, 2005).

Consumers seem to care particularly about how things “should” be, how they look. In other words, they often care more about something they perceived as authentic than something that is authentic in the most literal sense, as they want to live an authentic experience without enduring the hardships associated to it.

“Authenticity” might spring from many aspects, like particular design and originality, outstanding craftsmanship, links with territory and time (to reinforce tradition), or the capability to move people to action and to build communities (Gilmore & Pine, 2007). Authenticity in this last sense might provide to consumers that are linking a form of self-expression to the purchase act with a way to reinforce their identity and to make them feel like the member of a community.

This implies that while brands may select certain attributes to be authentic, for example by establishing a clear link to tradition, territory and cultural references, to be successfully perceived as truly authentic it is important to choose these attributes so that they are

shared by a community of customers. One possibility to do this is for the brand to become a “member” of an existing community.

And in the end brands should appear somehow distant from commercial considerations (Beverland, 2005), as authenticity is non-commercialized by definition and as such is probably better not to advertise it directly, but to make it perceived by the customers by embedding it in the brand and by building over communities of consumers.

### **1.5 Experiential marketing**

Companies can greatly benefit from customer experience frameworks available in the literature to conduct noteworthy and interesting analysis when it comes to creating a valuable customer experience. Experiential marketing can be described as a set of policies and strategies aimed at devising and implementing the best possible customer experience (Schmitt, 1999). To develop it a company should most obviously start by analyzing the preferences and attitudes of target customers, to identify the experiences they are most interested in, the one they care more about and thus satisfy them the most.

According to Schmitt (1999), we can individuate 5 experiential dimension: sense, feel, act and relate. Sense relates to what is perceived and how (is it pleasurable?). Feel refers to emotions, to the emotive reaction to what is sensed. Think refers to the more conscious and logical process of evaluating the experience and Act is related to the reaction to it and possibly to some action and interaction with the customers. Relate deals with the relations between the customer and the community, the social and cultural environment in which he lives. Successful companies manage to leverage experiences across all these dimensions.

To conclude, since value is something that is determined by the receiver (Montagnini & Sebastiani, 2013), and in this case the person that senses, feels, thinks, acts and relates, we can affirm that experience is an important determinant of value creation for customers when it is successfully embedded in the purchase process and can fundamentally influence buying behavior. For this reason, it is becoming an essential component of the value proposition of today’s retailers.

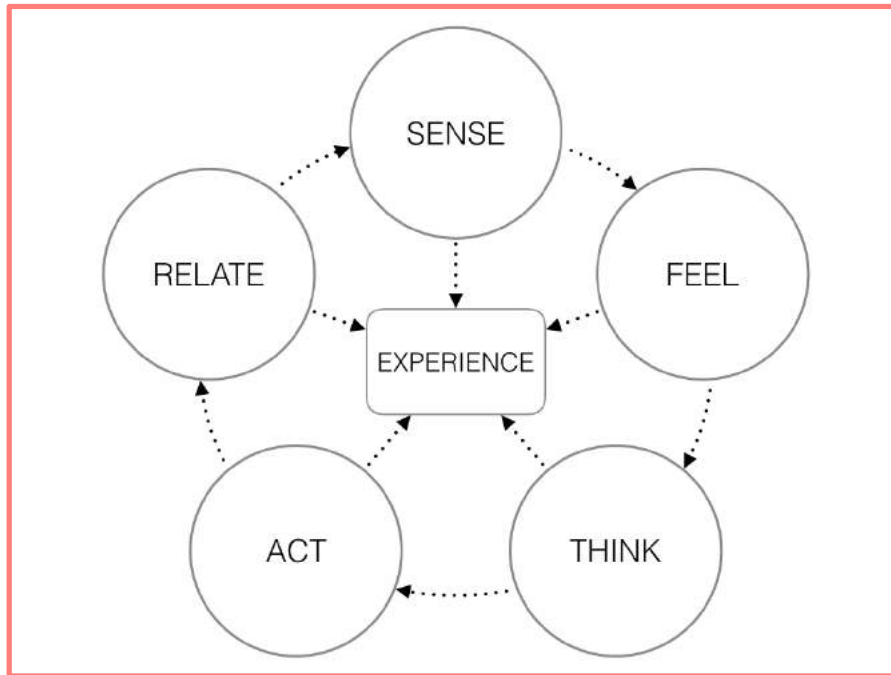


Figure 3: Experiential Marketing framework - Source: rework from Schmitt, 1999

## 1.6 Gap in the literature and research question

As seen in the previous section, social acceleration is at the center of a lively discussion in sociological literature, as it is connected to many theories that explain phenomena of modernity and post-modernity. However, this topic is still recent and thus the discussion around it presents some limitations:

First, at the moment the topic seems to be limited to sociological literature, and although some trends that are described by Rosa as characteristic and symptomatic of acceleration are indeed pointed out by many other scholars, the connection between them and the macro-dimension of an “accelerated” society has seldom been made. As such, the topic has rarely crossed the boundaries of sociology.

Secondly, social acceleration is described as an inevitable and intrinsic feature of our post-modern society, something we are already living in that is destined to self-reinforce and thus becoming even more important in the future. However, this line of reasoning in the literature is not immune to some fundamental criticism: the phenomenon is presented as inherently negative, thus the philosophical and sociological discussions is characterized by pessimism. It might be of interest to conduct a discussion free of this “value judgment”, and since acceleration is viewed as an immutable trend that cannot be changed it might be

best to discuss how to deal with it, or what kind of new possibilities this phenomenon is opening for individuals and companies.

In the third place, as stated before, the topic is often discussed in a very theoretical way, while it might be interesting to point out empirical implications in various fields, from sociology to business and marketing literature. Some topics worth exploring might be what kind of implications acceleration has in terms of customer behavior, what kind of trends can be linked to social acceleration (in the food sector) and how acceleration is affecting companies and fast growing companies of our era. It might be interesting to provide a definition of “fast” or “accelerated” company or economy to get a new perspective on some of the most recent trend.

One of the issues to be investigated in this work is if this acceleration can be translated in an acute social contradiction from which an ideology can sprout and thereafter be adopted as a brand ideology. In this sense, it can be observed how the Slow Food philosophy is per se an answer to social acceleration, even though the connection has not been underlined much in previous literature.

Since the Slow Food philosophy became the ideological foundation of Eataly, this company presents itself as one of the best example of how an ideology with strong ethical connotations born from (or against) the social acceleration can be incorporated in a business model and adopted by a brand.

Even though, as we observed, the case of Eataly was analyzed many times in the literature, past analyses present some limitations. Sometimes the case has been presented in a very descriptive way, and sometimes the charismatic aura of the founder, Farinetti, might have influenced the judgement. Some of the articles and studies explain Eataly’s success *a posteriori* and thus start from some implicit assumptions:

In the first place, the assumption that Eataly’s growth is in harmony with the ideology is very diffused, with the latter being one of the main pillar of Eataly’s overall strategy, influencing many of the brand choices. Since it can be observed that Eataly presents many contradictory aspects, a hypothesis to be tested here is that the company’s growth sometimes stands in direct contradiction with the ethical aspects of the ideology, therefore many decisions are taken “despite” the ideology, which is but one of the drivers of growth and perhaps not the most important.



Secondly, as per the founder's mantra, Eataly's intent is to diffuse knowledge about the food quality, to educate customers to buy less and buy better, to spread the value of tradition and of "clean, fair and good" food. This declaration of intent can be read as the explanation for a popular misconception: Eataly grows in order to "spread" the ideology. This idea is generating some confusion in the literature: is Eataly educating the market or is the company answering to a latent demand for quality and ethical behavior already diffused? To shed some light on this cause-effect relationship a second hypothesis should be tested: the need for quality and ethical behavior might be already diffused and reflected in recent consumer trends, and therefore by adopting the chosen ideology Eataly is capitalizing on an existing background and answering to a latent need of the market rather than creating such need.

Overall, the question to be answer within this work is:

**Can a food retail company achieve fast growth in the social acceleration context while remaining true to a "slow food" brand ideology?**

In order to test the first hypothesis, a few elements will have to be clarified and analyzed: in the first place an analysis of the brand should be made to define the ideological content and to check to what extent this ideology influenced brand architecture and decisions at different levels. An analysis should be conducted to test whether the brand is really perceived as ideological and coherent with the slow food philosophy by customers and by the Slow Food movement itself. Eataly's growth should then be analyzed to see if it falls into the category of "accelerated company", as well as to identify the possible alternative growth drivers and their impact (e.g. experiential marketing). Contradictions between the declared intent and the reality should be pointed out, described and analyzed.

To test the second hypothesis, an analysis shall be conducted to determine if there is a need of educating and shaping the market to create the trends Eataly wants to answer to (e.g. demand for high quality food, ethical behavior) or if these trends are already present in the market. Discussion should then be made to determine how Eataly is capitalizing on these existing trends.

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## 2. METHODOLOGY

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### 2.1 Qualitative Case study

The methodology chosen was mainly qualitative in nature, as it allowed to analyze the problem from multiple perspectives. This methodology was selected for the following reasons:

- The case chosen is “extreme, unique, revealing and pioneering” (Bertoldi, Giachino, & Stupino, 2015)
- The methodology is useful to study a phenomenon in its context, in this case the context is social acceleration and the phenomenon is the birth of brand ideologies connected to it.
- The methodology allows for the combination of multiple interconnected data sources that vary in nature. To analyze this case information could be found in past literature, books, news, websites, blogs, pictures, videos and other medias as well as data gathered in first person, integrated by an interview and two questionnaires.
- Part of the aim of this work was to get a better understanding of the case study itself.

### 2.2 Interview

An interview was conducted with a contact from Eataly’s Communications and Press Office in Turin, to assess the company’s perspective on the matter. The interview was qualitative and semi-structured. The interview was composed of three parts: the first part was aimed at get a better understanding of Eataly’s core concept. The second part was focused on Eataly as a brand with the various components. The third part was specifically aimed at assessing Eataly’s position on some of the most contradictory aspects the brand and the company present. To avoid getting a biased response throughout all the interview, the real issue that was to be object of analysis was not presented directly to the company, but was instead only mentioned at the end of the interview.

### 2.3 Questionnaires

Two quantitative questionnaires were prepared to integrate the other data sources, to better test the hypothesis and to compare result with previous studies and with the results from the qualitative research.

The first questionnaire (A) was aimed at testing whether the brand is perceived by Eataly's customers as ideological and to what extent, as well as to investigate if the brand is perceived as coherent with the Slow Food philosophy. It was also aimed to check (at least in part) the relative importance of the various driver of Eataly's success. The questionnaire was submitted directly "on the field" to customers outside Eataly's store in Monticello (Piedmont, Italy). The questionnaire was conducted in Italian, and some business and marketing specific terms have been purposely replaced with simpler versions to make the questionnaire perfectly understandable to the respondent sample. Some words chosen are thus very generic and sometimes could be open to different interpretation by different people. This has been done on purpose and helped in investigating the consumer perception and perspective around some macro-concepts, rather than leading them specifically in one direction. The questionnaire was refined with the help of fellow marketing students before submission.

The second questionnaire (B) was open to everyone with the primary purpose to assess the strength of some recent trend in food consumption and in the demand for ethical behavior, as well as trends related to social acceleration. It also tried to establish a relation between these two kinds of trends. The questionnaire was thus partly needed to validate some observations with hard data and partly to investigate some new aspects connected to practical implication of acceleration in food retail, as well as to test the second hypothesis presented in paragraph 1.6. It was web based and thus diffused through various communication networks like instant messaging groups, social networks, e-mails and other web communities.

## SECTION 2. CASE STUDY ANALYSIS

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### 3. THE CONTEXT

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#### 3.1 Brief history of food retail

##### *3.1.1 Traditional distribution*

One of the pillars of the model proposed by Eataly is tradition. Tradition might be interpreted in a lot of different ways, the more important of which being the traditional value of the product proposed in the assortment, but in Eataly's case it might also mean innovating through a return to a distributional model akin to the traditional one. Thus, it might be interesting to start by underlining some of the typical traits of traditional distribution as it was for centuries before the modern era (Venturini, 2010):

- Local dimension, closely linked to territory.
- Limited product range, mostly specialized by shop.
- Distribution as a simple activity, carried out directly by the producer or by someone that purchase from the producer, without involving too many steps.
- Central role of the shopkeeper as the intermediary between the products and the customers. The shopkeeper is knowledgeable about the product and provides all the necessary information, as well as advice, to customers. Sometimes customers cannot even see nor touch the product before being able to purchase it. The owner/keeper acts like a “storyteller” that educates the customers on the product and has to communicate the value of the product around dimensions like quality, authenticity and price.

It might be anticipated that Eataly wants to propose some of these aspects in its offering: for example, the link to territory, the lean supply chain (with no intermediaries between the producer and the distributor) and the storytelling in-store akin to tradition. These aspects will be further discussed later.

##### *3.1.2 Large-scale retail*

Historically, the emergence of large-scale retail can be linked to several factors, and among the others:

- The advancement in transportation.
- The advancement in communication systems.

- Industrial progress that enabled large scale production and industrial volumes.
- The emergence of a new consumer class, more numerous and with a new set of needs.

At the beginning of the XX century, large-scale retail took different forms: mail selling (forerunner of modern e-commerce model), shop chains and large scale stores (supermarkets). Most of the typical traits of those models are still present in today large-scale retail, for example the big dimensions, the focus on price policies, the power over suppliers, both on wholesale and producers, the availability of capital for investments, as well as precise organization and logistics.

In the food sector, large scale retail has become diffused to the point of saturation, and in the situation of extreme companies started to pursue strategies of differentiation. The main factor of differentiation has often been price, which means proposing lower prices than the competition. There are multiple ways of achieving this, for example purchasing high volumes, reducing logistic cost or reducing administrative costs through the adoption of new information and communication systems.

Another differentiation option is obtaining a different positioning through high quality product selections. However, when adopting strategies based on quality or quality/price, companies often fear the treat of imitation, a practice that is particularly strong in the food sector (Venturini, 2010).

Some companies managed to outperform competitors thanks to strategic acquisitions and internationalization strategy. Usually internationalization happens after a company has saturated the national market in the home country.

Another direct consequence of the competition among large-scale retailers is the diffusion of private labels.

These aspects might be relevant to the case in hand as it will be interesting to see Eataly's peculiar positioning and strategy in relation to the most popular practices.

### **3.2 Recent trends in food retail and consumption practices**

Food retail is a challenging and ever-changing industry for companies to operate in. In this section, some of the recent trends in retail format, food selection and consumer preferences will be presented and analyzed.

### **3.2.1 Retail trends**

**Channel shifting and the “grocerant” model:** in today’s environment, traditional supermarkets are being challenged again by small grocery stores. Evidence show a shift to smaller grocery stores with a smaller assortment (Duff & Phelps, 2016). On the other side, discounts and grocery stores keep growing with aggressive expansion strategies. Another trend that can be observed is the hybrid format of the “grocerant”, meaning that grocery stores are starting to sell prepared dishes and include areas for people to eat in (Johnson, 2016).

**Delivery:** even with the continuous improvement in delivery capabilities, automation and supply chains at a global, regional and local level, the online-grocery business model remains challenging (Duff & Phelps, 2016). However, demands continues growing and thus incentives companies to tackle the online segment and several traditional supermarkets have already entered the space.

**Technology and Big Data:** the advancement in technology affects large scale-retailers as well as other business. Thanks to big data predictive analytics has become more and more reliable and allows for all sort of optimizations in operations and logistics.

**Large operator advantage:** as large companies continue to grow, they can optimize capabilities, leverage fixed infrastructure cost and gain more power over suppliers (Venturini, 2010).

### **3.2.2 Consumer trends**

After the economic boom of the ‘50s and ‘60s a series of changes in the structure of the society brought a set of new variables that influence consumer behavior when it comes to food retail (Billero, 2012). The whole shopping experience begun to change.

Among the other variables some demographical factors can be identified, like birth rate slowing down, aging of the population, families getting smaller, as well as some structural variables like working hours’ changes, salary growth and the diffusion of full time employment among women, with the diffusion of dual-career families. There are also some cultural factors to consider: people started to associate consumption and food consumption to their own lifestyle, tradition and well-being.

In the ‘90s and early 2000s some new trends emerged. The first one can be defined as a “green” tendency, with the rise of ecologic consciousness, and the other one is the hunt for quality and food variety. (Billero, 2012).

After the economic crisis of year 2007, consumers went back cutting their monthly expenses for food. Although data clearly shows a decrease in sales for retail grocery, restaurants still register an increase: there is an increasing tendency of eating outside rather than cooking at home that can be linked to changes in family habits and structure, as well as to a different allocation of free time.

Unsurprisingly, consumption trends are not homogeneous across generations, thus it is possible to point out some trends that characterize Millennials and Baby Boomers, the two biggest demographic segments in the reference market (which is again developed countries, as per what is interesting for the case that will be discussed here).

Millennials are becoming the largest segment of the population and they are soon to surpass Baby Boomers in number, becoming the largest living population and therefore driving change in eating habits, food selection and food preparation. Millennials show a tendency to look for convenience as they look for fresh and already prepared food (thus saving time).

On the other side, while still very important and numerous, Baby Boomers are shrinking in relative and absolute size and, most prominently, they are aging. As such, they are starting to retire and developing health problems that are heavily influencing food and beverage choice of consumption. Therefore, they start to be more concerned with health issues and looking for healthy food.

When it comes to product choices some trends can be observed (reworking from various sources, questionnaire B):

**Fresh food, vegetables and healthy food:** as consumers look for versatile, nutritious, flavorful and healthy food, the average fruit and vegetable intake has grown in the recent years. On the one hand retailers have to react by updating their fresh food offering, on the other hand new fruit/vegetables based product are born every year. In 2017, the food and drink industry will welcome more products that emphasize plants and vegetables as key ingredients (Mintel, 2016) as consumers are increasingly trying to integrate the benefits of plants in their diets (Innova Market Insights, 2016). The demand for healthy food is also driven up by Baby Boomers, who are aging and therefore increasingly looking for aliments with high values in whole grains, protein and calcium and at the same time controlling their daily intake of saturated fat, sodium and cholesterol.

**Local and traditional food:** “Local” is here can be interpreted both as produced locally and as “traditional”. Consumers are increasingly interested in knowing where their food is coming from (Duff & Phelps, 2016), because they often believe food produced locally is fresher and tastes better. Therefore, the demand for transparency increases (Kenward, 2016). Consumers also show a tendency to look for products with ties to the past or that somehow innovate by recovering traditional aspects (Mintel, 2016).

**“Convenient” food:** consumers value convenience as well as freshness, the demand for already prepared food keeps growing. In 2017, the time spent on/saved by a food or drink product will become a clear selling point. (Mintel, 2016). This growth might be driven by Millennials, who increasingly express a sense of lack of time that is influencing their behavior (questionnaire B).

**Clean (ethical) food:** there are many ethical issues that influence purchase behavior and increase the demand for ethically responsible products from a social and environmental point of view. These factors might include (among others) products that might cause problem to the health of the consumers or other people involved in their production or treatment, product that might cause harm to the environment during production or disposal, product that have been produced by causing harm to animals or that endanger some species, as well as product made by exploiting forced labor or child labor. For these reasons the market for products associated with high ethical standards is flourishing and growing double digit despite the recession, and products well positioned as eco-friendly, humane, fair trade, green, natural, organic and so on are enjoying great success in developed countries (Massa & Testa, 2012). However, the ethical product market is not yet developed to its full potential (Bray, Johns, & Kilburn, 2011). A possible explanation for this is the concept of ethical product which is not thoroughly specified and thus might include a variety of aspects (Sebastiani, Montagnini, & Dalli, 2013).

### ***3.2.3 The search for experiential value***

As discussed in paragraph 3.2.2, customer preferences are shifting and their expectations in terms of products are deeply changing. In particular, they are seeking more variety and personalization of the offerings. Moreover, the focus is slowly switching from the product itself with its physical attributes to the bundle of products/services and experiences that the offering entails. Consumption is transforming in a process where the sharing of knowledge and values as well as the transmission of symbolic meanings overshadows the actual product/service exchanged. Therefore, attention must be paid to immaterial aspects,



since the value for the customers depends directly from the experience that the consumption process itself helps to accomplish (Holbrook & Addis, 2001).

This phenomenon has led to deep changes in retailing, as companies needed to adapt and re-invent their offerings and the way they interact with customers. To manage the complexity of the new preferences, they often need to propose new value offerings aimed at immersing customers in new meanings, to stimulate new ideas and emotions and intangible values. Only by differentiating symbolically companies are capable to sustain competitive advantage (Prahalad & Ramaswamy, 2003).

Therefore, selling the experience and creating a unique community for your customers has become paramount (Marcovitz, 2016), since consumers, when evaluating a purchase, are driven more by a desire for new sensations and experiences than instrumental and determined assessment of actual need (Bertoldi, Giachino, & Stupino, 2015).

Consequently, we have seen the raise of new business models that propose a careful balance of functional and experiential value. These “hybrid” solutions have often proven to be a winning formula for growth and profit. (Montagnini & Sebastiani, 2013).

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## 4. HISTORY

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### 4.1 Oscar Farinetti

Eataly’s founder, Oscar Farinetti, was born in Alba (Italy) in 1954. He graduated in Economics at Turin’s University and in 1978 he started working in his family business: a supermarket called Unieuro Market. His father made him responsible for the electronics department. To achieve scale economics and have more power over supplier, Oscar Farinetti decided to expand the business by opening new electronics stores. Unieuro Market expanded as well with a bigger store and by opening new electronics stores. Unieuro would cease the activities in the food sector to concentrate on electronics in 1989, and managed to achieve rapid expansion thanks to strategic acquisitions in the following years.

Three main factors can be considered to explain the success of the Unieuro group (Venturini, 2010): first, the ability to create a virtuous circle between growth and power over suppliers. Secondly, aggressive marketing practices, especially when it came to pricing, introducing sales and discount practices in the electronics sector. The third factor is

the choice to invest in a fast-growing industry that was especially developing in the '80s and '90s.

In 2001 Farinetti sold UniEuro to the English electronics giant Dixon. From then on, he started collaborating with the university of Parma and the Cermes-Bocconi institute. He apparently already had the first Eataly supermarket in mind (Sartorio, 2008) in 2002, although he would first create an on-line store (eataly.it) in 2004. Between 2003 and 2007 he travelled across Italy to visit local producers, to taste the products, to study local traditions and to acquire as much information as possible on the specificities of the agro-food industry. On January 27<sup>th</sup> 2007 he opened the first Eataly store in Turin.

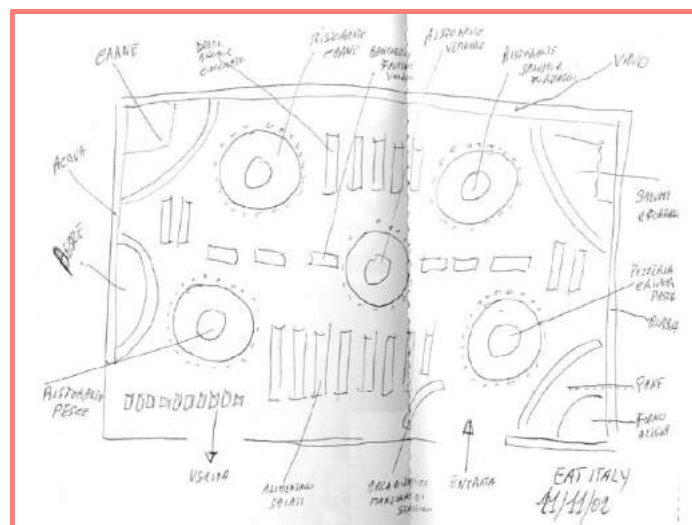


Figure 4: Drawing of the first Eataly - Source: Venturini, 2010

## 4.2 Eataly's history

### 4.2.1 The idea

The original idea sprung from Farinetti's passion for Italian gastronomy, high quality food and wine culture, therefore he was always looking for restaurants and inns that satisfied his taste (Bertoldi, Giachino, & Stupino, 2015). From the start, he wanted to create a supermarket-like space that provided what Eataly itself defines as "high" food (literal translation that can be explained as excellent, fresh and authentic) at a reasonable price. To realize this, one of the things he needed to do was shortening the supply chain, cutting down intermediaries along the distribution channel and setting up a dialogue directly with the producers. On the other side, he could exploit consumer product techniques taken from large scale retailers such as variety, informality, reasonable price, special offerings.

The concept can be explained as the integration of three different aspects: to eat, shop and learn (elements that will be further discussed later). These aspects can be translated in a space that is different from a traditional supermarket or from a traditional restaurant. Farinetti wanted to create a space where people could experience food (Billero, 2012) and to make high quality products available to more people: this “democracy of quality” is among the core values of Eataly (Montagnini & Sebastiani, 2013). The selection of products promoted should be good (tasty), clean (respectful of traditional production processes and raw materials) and fair (by granting the right margin to producers by streamlining distribution).

The challenge from the beginning was to make people put quality of the purchase before quantity, to buy less but buy better, and to combine in the same setting a place for customers to learn about quality food provenience and production process, to eat, and to purchase “high” food but with affordable/fair prices and the format chosen for the first store (and use as a reference model subsequently) can thus be described as an open space that integrates a market for food and beverages, some restaurants, artisanal gelato places, cafés and a zone dedicated to educating the customers to quality and products’ provenience.

The idea was supported by data: a table by the National Institute for Statistics ISTAT (Sartorio, 2008) showed that only 10% of the population ate high-quality foods consistently. Therefore, the target market that Farinetti wanted to capture made up the remaining 90% of the population. He was thus confident in the idea’s potential for success, future expansion, and scalability.

#### ***4.2.2 The name***

The name Eataly is quite straightforward: as the fusion of Eat and Italy its primary purpose is to underline the Italian origin of the products and to be a tribute to Italian food. The project was initially called “Eat Italy”, then the team decided to unite the two worlds and to register the brand.

#### ***4.2.3 Opening stores in Italy and in the World***

After the great success of the store in Turin, which managed to attract 300 000 visitors after the first month, in October 2007 the second store was opened. The location chosen was the Coin building in Piazza delle Cinque Giornate, Milan. It was a pretty small space, very different from the huge store in Turin for dimension and geographical position, but it enjoyed great success nevertheless and thus convinced Farinetti and his team that the new concept had indeed a huge potential for growth and scalability.

In September 2008, he opened the first store abroad, specifically a 1500 square meters space in the district of Daikanyama of Tokio. It was successful as well, with a 3,6-million-euro turnover in year 2010, despite it being a difficult time for the country.

The success led to the inauguration, between 2008 and 2010, of 3 other stores in Italy (Bologna, Pinerolo, Asti) and 3 other stores in Tokio.

2010 is a very important year especially for the inauguration of one of the biggest and most profitable store, the first center New York (revenues of 75 million dollars in 2010). Eataly arrived therefore in the US, another important step towards international expansion, which happened very quickly as in 2015 and 2016 many stores were opened all over the world.

Today Eataly counts 33 stores in 11 countries.

#### ***4.2.4 Governance and management***

Today Eataly belongs for 40% to Farinetti's family, 40% is controlled by Coop and the remaining 20% by Tamburi Investment Partners (Patti, 2016).

Oscar Farinetti has no longer a formal role inside the company, since in 2015 Andrea Guerra was nominated executive president. Eataly has 3 CEOs, Francesco and Nicola Farinetti (the founder's sons) and Luca Baffigo (Manacorda, 2015).

### **4.3 The partnership with Slow Food and Coop**

Slow Food integration and consultancy was very important to create a model capable of combining a mass market logic and ethical consumption practices. From the very beginning the project was influenced by Carlo Petrini, considered by Farinetti a close friend and colleague. Petrini is the founder of the Slow Food movement, an association with the purpose to protect food and wine patrimony (Montagnini & Sebastiani, 2013).

As previously discussed the organization aims at promoting the knowledge about traditional and high quality food and wine and the enjoyment of meals as an experience. As per Slow Food self-provided definition, the movement is opposing the "fast food" logic associated with the advancement of modern life, with frenetic time schedules and uniformity of tastes brought by globalization with a consequent lack of interest in seeking out fresh product (although we could argue that this trend is changing, as pointed out in chapter 3). The main objective of Slow Food is therefore to safeguard the agricultural, food and wine tradition of all parts of the world (Bertoldi, Giachino, & Stupino, 2015).

This philosophy had a decisive role in the business model deployed at Eataly, after all Good, Fair and Clean are the characteristic that Slow Food promotes for the products it supports. Similarly, Eataly wants to promote, alongside the products it is selling, a set of values rooted in tradition and culture and linked to good and respectful ways to appreciate and taste food.

Coop, one of the major food retailers in Italy and leading in developing strategies for sustainable products, acquired 40% of the capital of Eataly, bringing new forces and experiences and providing logistics knowledge to manage operations from and to the stores (Aal, Di Pietro, Edvardsson, Renzi, & Guglielmetti Mugion, 2016).

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## 5. EATALY AS A BRAND

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### 5.1 Creating the customer experience

It is often argued that Eataly's strong point is the ability to transform the purchase act into an experience with a high value-added for the customers. As we already discussed, the ability to successfully create a high value added experience can be one major driver of competitive advantage, and it is indeed true that Eataly makes great use of experiential marketing. As stated by Farinetti himself, Eataly's goal is to become an "all around show" (Montagnini & Sebastiani, 2013) by reaching a balance between information, education, smells and fragrance and taste, and thus obtaining the ability to transmit emotions to the customer. The first shop opened in Turin contains 11 small thematic restaurants (with different specialties like cheese, pasta, gelato etc.) as well as many areas with non-food products such as books or kitchen tools, rooms for education (courses) and conferences. Some spaces are studied so to recreate the feeling of a marketplace in a traditional sense, with different stalls where people can touch, smell and then carefully select food. This amplifies the interactions with customers, creating a playful atmosphere and a pleasant and appealing environment, therefore enlarging the time people spend in the shop and allowing them to identify with Eataly's value and product selection.

Schmitt's framework will now be used to analyze the customer experience at Eataly:

**Sense:** the company's objective is to have some sensorial impact on the customers to add more value to the brand identity and the products. The environment offers to the customer the possibility to taste and smell traditional fragrances that remind of old times, achieved through careful combination of spices. Every detail is thoroughly studied. Walking through Eataly is like living a vivid experience (Billero, 2012), while eating at the restaurants gives you the possibility to try food "like in the good old days", good and authentic, thanks to high quality ingredients and a well-trained staff.

**Feel:** Eataly's objective here is to create affective experience tied to the brand, to trigger emotions and feelings, to have an emotional impact on the customers by triggering nostalgia, joy, fun, happiness and so on. The purchased product is a piece of a magical world made by good, clean and fair food in a traditional setting, and this might influence some product or packaging choice, like Chinotto with a traditional glass bottle, to bring food history alive again and allowing customer to retrieve childhood memories, playing with the boundaries of past and present.

**Think:** as the mind must be involved and stimulated as well, you must appeal to intellectual capabilities, excite creativity and the willingness to learn and discover new things. At Eataly, this is possible thanks to the interaction with the various areas and especially thanks to the communication and the educational areas.

**Act:** Eataly's customers is periodically involved in physical activities aimed at enrich the experience and to suggest new perspective on food consumption. Among these activities there are cooking classes, meetings with famous chefs and guided tours. There are also interactive points (sponsored by Apple) where the visitor can surf the internet to discover daily tips and recipes. Involving the customer and stimulating action is considered very important,

**Relate:** Eataly's objective is to become an encompassing experience that changes the customers and makes him feel like part of a bigger community, as well as discovering a new perspective on culture (and food culture in particular).

## 5.2 Eataly as a brand

It will be argued here that one of the drivers of Eataly's huge success and rapid expansion is its strength as a brand. In the first place, the initial idea and the format is directly translated in a strong brand "message", here seen as a clear brand contract with strong ideological foundation. Secondly, all the subsequent choice that have been made, including communication choice and the products that ended up to be selected as part of the assortment, and therefore the brands that became part of Eataly's universe, are coherent with the contract and the ideology. In the third-place Eataly uses all these elements to make heavy use of storytelling in-store to link the products to the tradition of local productions.

Another point that can be made is that the unique customer experience that Eataly is able to create is the direct consequence of the unique brand architecture as it derives from the combination of the various brand choices Eataly has made.

Moreover, having a strong brand is very important to allow Eataly to successfully communicate its values to customers, so that when it comes to being sure about the characteristics and quality of the products and brands in the assortment, customers will be placing their trust on the retailer brand (Eataly).

## 5.3 Eataly's Brand Contract

After conducting an interview with people from the company itself, it was possible to determine that “at Eataly the customers expect to buy and eat high quality food, as well as to learn more about food culture and the products on display.” Here again the triplex intent that was at the very basis of Eataly’s conception can be as well identified as the contract that the company is proposing to its customers. It will now be dwelt deeper on each of the three aspects.

### **5.3.1 Shop**

The retail part of Eataly drives an important portion of the revenues alongside restaurants. All over the store there are zones dedicated to selling high quality food and drinks, with every area having a different theme. Alongside the variety of the food offerings, careful attention is given to Slow Food products which are rarely found in traditional supermarkets and instead have a premium spot at Eataly. Another important factor to consider is seasonality of the products, as it plays a key role in conveying the idea of excellence and authenticity.

Combining retail and restaurants allows Eataly to place orders across shops and restaurants. This relationship allows for some flexibility, whereas if a restaurant is running low on ingredients, it can take some from the retail stock, and vice-versa. Therefore, sharing resources allows for greater cost savings as well (Terenzio, 2015).

### **5.3.2 Eat**

The catering area is arranged according to different themed zones like the retail part. The “eat” part is composed by various small restaurants that offer fairly specialized menus (in accordance to the themes) with a characteristic in common: they are all made by dishes prepared with fresh, seasonal and local ingredients. Two aspects in apparent contradiction characterize meals at Eataly (Bertoldi, Giachino, & Stupino, 2015). The first one is the authoritativeness which derives from the raw ingredients selection, which are chosen carefully and tested to guarantee the high quality standard proposed, as well as the presence of well-trained staff. The second aspect is the informality of the atmosphere, which springs from the homely setting. Everything is studied to establish a true and genuine relationship between Eataly’s brand and the customer, as well as to recreate the experience of eating as a pleasant and enjoyable familiar moment.



Many restaurants are first come first served or they rely heavily on wait-lists, allowing customers to move around the store while they wait, exploring the other shops or eventually grabbing a glass of wine. They rarely follow a traditional reservation moment, but the presence of many restaurant under one roof allows people to eventually move to another table close by, as well as provides them with a higher variety of options. Although restaurants are treated as separated profit centers and some light friendly competition exist among them, the goal is to keep them inside Eataly (Terenzio, 2015).

Thanks to this policy of selling what is cooked and cook what is sold, Eataly is able to avoid surplus of stock and food waist, and more importantly, as per what Farinetti himself said, customers searching for high quality food are not willing to pay for meals cooked with ingredients that are not 100% fresh and thus still maintaining their flavor (Sartorio, 2008).

### **5.3.3 Learn**

True innovation at Eataly derives from the integration of the didactic component, which is considered one of the strategic pillar both in encouraging the right approach to food choice and diet and in establishing trust with the customers. Many courses are held in the stores with various focus and target (from children to aged people). There are courses on cooking, pastry and dough making, food and wine tasting and aperitif moments where people can get to know the food on sale better and eat something while attending the course (Bertoldi, Giachino, & Stupino, 2015). Courses represents a unique opportunity for storytelling and encourage guests to buy the ones they like the most.

To educate the customers the first step to take is to have educated staff, so that they would be able to share in-depth knowledge about the food selection. In order to achieve this, Eataly conducts weeks of intense training on products with experts in wine, cheese, olive oil etc. (Terenzio, 2015), as well as training them about product provenience and the process of transformation that brings them to the shelves.

## **5.4 Eataly as an ideological brand**

As previously discussed having a clear message is very important in the food sector as it impacts people health and safety directly (Bertoldi, Giachino, & Stupino, 2015) and therefore consumers' concerns and anxieties reinforce the demand for ethical behaviors by food companies (Massa & Testa, 2012). At Eataly, the message carries over the concept of "clean, fair and good" and it probably goes beyond the simple "contractual" nature and is instead

positioned in the domain of an ideological stance. This idea is strongly reinforced by some aspects embedded into Eataly. Here the focus will be on two in particular: the ten commandments and the integration of the Slow Food philosophy, or better how the “clean, fair, good” aspects are impacting various strategic decisions.

#### ***5.4.1 The ten self-commandments***

As each decision before and after opening a store must be aligned with Eataly’s values and guiding principles, the company developed a series of rules according to three guidelines: sustainability (clear, fair, good etc.), responsibility (as Eataly means quality) and sharing values. These rules take the form of a manifest composed by ten commandments (from 0 to 9) to reinforce the ideological value of quasi-religiosity of Eataly’s principles. Here are the commandments:

0. We are in love: in love with food, tradition, stories etc.
1. Food unites people: relates to the goal of creating a community of people that appreciate high quality food.
2. This is our job: translating passion for high quality food in passion for the job.
3. Quality of life: high quality food has a direct impact on quality of life.
4. Everyone: this is the target of Eataly (the democracy of quality).
5. Eat, shop, learn: as previously discussed.
6. Co-producing: the declared intent of Eataly is to educate customers to the point to allow value co-creation, respect of small food producers and quality.
7. Three experiences: high quality food assortment, democracy of quality and food education for everyone.
8. Sincere: as in transparent and honest.
9. Reach the goal: the ultimate (utopic) goal is to open a new way for food retail, educating the customers and enhance quality of life for everyone.

#### ***5.4.2 Embedding the slow food philosophy: clean, fair and good***

It can be observed how the good, clean and fair food ideology, shared with Slow Food, is embedded in the brand architecture (re-elaboration from Massa & Testa, 2012; interview with Eataly):

##### **Fair:**

- No exclusivity asked to suppliers: one of the main points of Eataly’s strategy is the declared intent to select small traditional producers and providing them with a way

to access the mass market they normally wouldn't have. Usually though, when a large retail company relies heavily on small scale suppliers, it exerts its "buyer power" to ask for exclusivity, making the supplier locked-in. Eataly views those suppliers as partners instead, letting them share their stories with the end customers, thus celebrating the quality of their products and underlining its link to tradition. This is aligned with the ideology of fairness.

- No private labels: no private labels are included in Eataly's assortment, and here again because the company believes them to be unfair practice that make producers anonymous (while Eataly wants to preserve and celebrate them through storytelling). Again, this is not a common choice for large-scale retailers, that have realized in recent years how they can exploit private labels to differentiate themselves from the competition and add value to the store and company brand as opposed to the various product brands while at the same time enjoying higher margins.
- Bread as loss-leader product: Eataly selected bread to be the loss-leader product (to attract customers in the store) and consequently decided to produce its own bread on-site. This again can be interpreted in light of the fairness ideology as usually supplier do not like their product and their brands to be selected as loss-leader for various reasons, including image and substitution issues, so Eataly decided to take care of it itself and preserving the good relationship with suppliers. Moreover, it produces bread continuously, never running out of it (as it is common practice with loss-leader products) to be fair with customers.
- Educating the customer: the whole "learn" and educational intent can be interpreted as expression of fairness, as the company intends to create a customer that is informed about food issues, of product quality and takes her/his time to evaluate purchase decisions (buying less but buying better), as opposed to traditional big retail stores who prefer customers who buy as much as possible as fast as possible. Eataly periodically organize free courses that teach various kinds of customers what is "clean, good and fair". Moreover, the company wants to teach customers that it is worth to pay a "fair" higher price for superior quality products.
- Pricing strategy: According to Eataly's founder intention the company should making money by selling, as opposed to buying and "strangling suppliers". Thus price must be carefully balanced between Eataly's purpose of giving fair share to suppliers and its margin. Moreover, the company declares that price in the food sector is often obscure, as it is not clear what you are paying for, while Eataly wants to get

around this problem by being transparent. At the same time, while it is natural to pay higher price for higher quality products, the difference is still not so pronounced in the food sector, and as such Eataly aims at keeping the prices “reasonable” to preserve the image of “democracy of quality”. Nevertheless, Eataly is often criticized for its pricing practice. On the one hand, some says the prices are excessively high and Eataly’s margin should be cut altogether as per the company strong ideological position. On the other hand, some producers criticize the “reasonable” policy as making their product affordable would damage their brand image.

- Short supply chain: Eataly cuts the supply chain for the product on sales to the minimum, often purchasing directly from the first producers. This is of course allowing the company to pay higher prices to the first suppliers than they normally would receive (fair) without jeopardizing Eataly’s own margins. This practice is not immune to criticism as it leads to a fragmented supply chain with higher maintenance costs and transportation cost, thus possibly more polluting as well (and in contrast with the ideology of “clean”).
- Democracy of quality: this idea emerges from Eataly’s slogan, initiative and more importantly from the pricing strategy. Making quality food available to everyone is one of the goals explicitly declared by Eataly. On every important implication is that Eataly wants to position outside the luxury niche, reaching out to the bulk of the market, and thus sometimes the decision it takes might be in contrast with brands with a luxury positioning.

**Good:**

- Limited assortment depth: having too much variety on the shelves is not important as you run the risk to incur in some “choice overload” forcing customers to rely on price variables or gut feelings to take their decisions instead of making a well-informed purchase. This decision was taken in accordance to the ideology of “good” products as only really good ones can make it to the shelves. Moreover, as seasonality is important, out-of-season fresh products are not in the assortment.
- Limited quantities: again in accordance to the ideology of “good” is the limited quantity of the product. According to Farinetti when buying high quantities it exists a threshold beyond which quality is not controlled and maintained anymore. There-

fore at Eataly products are available in limited quantities. Moreover, limited quantities are connected to quality and good food as they are usually associated with small-scale, hand-crafted productions.

**Clean:**

- Local products: selling local products can be seen as “fair” to local, smaller producer as discussed before but it is also a symptom of the “clean” ideology. Selecting suppliers closer to the store allows the company to limit pollution and at the same time to keep the freshness of the product without polluting the environment to maintain it.
- Light packaging: as packaging is another fundamental characteristic of product brands, Eataly’s choice is to keep it to the minimum to concentrate the focus on the product, as well as to ask suppliers to keep it as light as possible. This might be seen as in contradiction with common practices of making flashy and elegant packaging as this aspect might play an important role in selling the product, however as customers pay increasing attention to ethical and environmental issue, they might actually be attracted by sheer simplicity and by this minimalistic approach to packaging.

## **5.5 Morphology: Eataly’s codes and symbols**

Among Eataly’s codes and symbols, we can distinguish primary brand elements and secondary brand elements (framework from Visconti, 2016 quoting Keller, 2015). The most relevant ones will be now presented and analyzed (main source: direct observation):

### ***5.5.1 Primary elements***

**Brand name:** Eataly is a corporate brand, the name chosen is the combination of Eat and Italy. The interesting thing to note here is that despite Eataly’s Italian origin, close ties to Italian territory and traditions, the name chosen is in English, hinting from the very beginning an international component of Eataly’s DNA.

**Eataly’s logo:** the logo chosen is in line with the overall “clean” communication style chosen. The colors (white and brown) are recurrent in Eataly’s ads and posters.



*Figure 5: Eataly's logo – Source: eataly.com, 2017*

**The slogan (payoff):** the slogan chosen is “alti cibi” and is left unchanged in Eataly’s communications outside Italy, so that the Italian language helps connecting the brand to Italy. “Alti cibi” means “high food”, where high is connected to high quality but also high moral standards, a sort of summary of the underlying “good, fair and clean” philosophy.

**Packaging:** although Eataly is a corporate brand and not a product brand, some common characteristics can be observed in the packaging of the various products in the stores, which are kept to the minimum, as simple and light as possible, utilizing wood and paper. This choice is in line with the ideology (“clean”) and with the general “simplicity” of the style adopted by the brand.



*Figure 6: Simple packaging 1 - Source: pinterest, 2017*



Figure 7: Simple packaging 2 - Source: *Breads, Cakes and Ale, 2013*

**Olfactory branding:** with restaurants inside the store and the oven continuously baking bread, Eataly is making sure that Eataly is associated with the good smell of freshly made food.

#### ***5.5.2 Secondary Elements***

**Country of origin:** Eataly is leveraging on a strong country of origin effect, both in terms of products produced in Italy and in terms of products produced with traditional Italian processes, thus being able to sell fresh “Italian” product made abroad in the international stores (interview). The brand managed to gain authoritativeness in defining what is Italian and what is not, therefore becoming assurance of authenticity. Further discussion on this matter will be made in paragraph 5.7.

**Co-branding:** one of the sources of co-branding is Slow Food, whose logo on the products found at Eataly helps creating positive association in terms of quality insurance, as well as reassuring the customers that ethical behavior has been respected. Moreover, the various brands of the products in the assortment directly impact the perception of Eataly’s brand, as they are associated with high quality products that are usually hard to find and thus accessible only by a niche of customers (e.g. “the famous durum wheat Gragnano pasta, Piedmontese egg pasta, mineral water from the Maritime Alps, Veneto wine, the oil of The Ligurian Riviera di Ponente, Fassone beef and traditional Italian cured meats and cheeses” (Aal et al., 2016)) as well as other high quality (and premium) well-known brands (e.g. Venchi, Afeltra, and Illy).

**Testimonials:** Eataly found a sort of personification in its founder, Farinetti, the “enlightened” entrepreneur on a quest to recover Italian food tradition. In the U.S., Eataly chose some well know partners who are also representing the brand, namely Joe and Lidia Bastianich and, most prominently, Mario Batali, a famous chef associated with high quality product selection and Italian cuisine.



Figure 8: Mario Batali branded product sold by Eataly - Source: eataly.com, 2017

### 5.2.3 Stylistic repertoire

The stylistic repertoire comprises the way the various elements are matched together, the discourses that are created out of them (Visconti, 2009).

Eataly demonstrates particular consistency in the way it communicates. The poster are always clean and essential, with a dominance of the white color, with some the addition of black and brown. Two main components can be distinguished: simplicity and irony. The messages used are simple and easy to understand, and irony is used with the intent to capture the customers’ attention (Billero, 2012; Venturini, 2010). The main objective (in line with the educational intent) is to establish a dialogue with the customers. The price is rarely mentioned, if only for educational purposes, and Eataly’s logo is not utilized. Eataly speaks about the products’ history and provenience.





Figure 9: Eataly's communication style - Source: dissapore.com, 2015



Figure 10: Example of irony at Eataly - Source: original picture, 2017

These choices are consistent with the intent of creating a universe that speaks with and about products, celebrates small-scale producers and reminds of tradition. To further reinforce this idea, Eataly ought to look very differently than the average supermarket and more like a traditional marketplace instead, with small stalls and different spatial organization.



Figure 11: Marketplace stall at Eataly Monticello - Source: original picture, 2017



Figure 12: Marketplace feeling at Eataly Munich - Source: eataly.com, 2015

But Eataly's universe is also a universe of quality, therefore the clean and well-designed space, the consistency of the color code with the white dominance and the spectacular buildings chosen (because the building is "the first showcase" (Zorzetto, 2014)) seem to communicate a sense of premiumness and position Eataly as a luxury brand. This last (contradictory) aspect will be further discussed in paragraph 6.4.1.



Figure 13: Eataly Milan - Source: scattidigusto.it, 2015



Figure 14: Rooftop Birreria at Eataly New York - Source: eataly.com, 2015



Figure 15: White dominance at Eataly Monticello - Source: original picture, 2017

## 5.6 Narratology: Storytelling at Eataly

Eataly has chosen to tell small stories. After all the brand draws its strength from the small-scale producers it celebrates in the name of tradition recovery and “fairness”. Therefore, in its communications Eataly tries to remain hidden and to let the producers speak and tell their story, explaining how they select their products with respect for tradition, territory, and high quality.

Most of the storytelling happens in-store, akin to that traditional marketplace model where the shopkeeper acts as an intermediary between the products and the customer. Eataly is the shopkeeper, and the stories told make heavy use of analytical persuasion (Visconti, 2016) with a text-heavy communication style. The goal is to educate the customers with rational arguments and irony is used to compensate this didactic tone and increase involvement.

There are many reasons that could explain the choice of this type of storytelling: in the first place, it might be appropriate to satisfy the need for transparency that consumers are demonstrating when it comes to food choices. In the second place, it appears coherent with the “learn” part of Eataly’s brand contract and further pushes the educational intent. In the third place, Eataly is not only trying to impress the customers, but rather to involve them and establish a sort of dialogue (Billero, 2012). After all, when customers feel involved they become storyteller themselves, they take pictures of food, they share the story and their experiences (Marcovitz, 2016).

## 5.7 Authenticity

Authenticity at Eataly can be analyzed on different levels:

**Original authenticity:** as Eataly successfully built a unique customers experience thanks to the triplex intent of “eat, shop and learn” as well as the original recombination of traditional and modern elements into its stores.

**Natural authenticity:** which is found in what is present in nature, and can be observed at Eataly in the intent to keep the products as natural as possible, therefore selecting suppliers whose production process does not involve excessive transformation of the raw ingredients and bringing the products from the farmers’ hands directly on the consumers’ tables.

**Exceptional authenticity:** this derives from exceptional workmanship, and can be found at Eataly in the high quality of the meals served at the restaurants following traditional recipes, or in the precise selection criteria for suppliers based on their production processes that must respect a set of standards.

**Referential authenticity:** maybe the most apparent aspect, it's found at Eataly in the close connection with Italy, Italian culinary tradition and products. There's also a temporary dimension when defining "tradition" as something that use to be done since ancient times.

**Influential authenticity:** as it deals with the capability to encourage action and to build a community, it is a very important aspect for Eataly as well. The whole "Learn" aspect is carefully studied and aimed at change, at least a little, people habits so to make them more conscious about food and their diet and to stimulate them to buy "less but better". This new consciousness makes the customers feel like part of a community that respects the Italian tradition, consumes high quality products for meals and is overall healthier. This community was not built from scratch, since by selecting slow food as a partner Eataly was capable to build over some existing communities and network.

In any case, according to the company (interview) Eataly is not concerning itself with authenticity directly, nor does it advertise it. Authenticity is instead born from the authoritativeness that customer have long since recognized to Eataly in distinguish what is really Italian and traditional and what is actually only Italian "sounding" and built for commercial purposes.

## SECTION 3. DISCUSSION, RESULTS AND CONCLUSION

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### 6. EATALY, FAST OR SLOW?

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#### 6.1 Eataly's fast growth: an "accelerated" company?

Does social acceleration affect companies? In the era of start-up incubators and accelerators and of the double-digit growth mantra it would appear so. Buzzwords like flexibility, innovation and scalability are everywhere in the world of entrepreneurship, and Farinetti is first and foremost an entrepreneur whose business genius is hard to deny. Eataly is proposing a new model that incorporates the Slow Food philosophy, but at the same time the company is growing incredibly fast. After all, it is only 10 years old and was still a "startup" when it started expanding internationally. The ingredients chosen by Farinetti for UniEuro's growth were power over suppliers and low prices, while for Eataly he made a radically different choice: ethical collaboration with suppliers, "fair" prices and "democracy of quality". Could the company achieve fast growth and still be coherent with this "slow" philosophy? Or is it bound to incur in contradictions? The purpose of this chapter is to further answer this question by discussing some of Eataly's most contradictory aspects.

##### *6.1.1 The rapid growth*

Table 2 shows Eataly's double digit growth (in sales) in recent years and the projection for the future (Patti, 2016, reporting data from Intermonte, 2016). This growth is not translated directly into profit growth since the company has made a lot of investments to continue its quest for international expansion. The growth looks striking although the 6% increment between 2015 and 2016 seems to hint a possible slow down. However, 2015 was a peculiar year for the company, since sales were driven up by Eataly's regional restaurants inside Expo in Milan (Patti, 2016). Moreover, future growth will probably be driven by the wave of new store openings around the world from 2016 and the plans for further expansion of 2017 and 2018. It's interesting to note that Eataly makes most of its revenues with the retail arm in Italy, while in the U.S. the restaurants drive most of the revenues (Faris, 2013). According to the forecast by Intermonte (2016) EBITDA will keep growing in future years and profit might increase threefold.

For these reasons, Eataly is planning to go public. As per declarations by Farinetti and Guerra (Insalaco, 2017), when the company will be strong enough it will do so, and therefore Eataly might go public in 2018 or 2019.

<b>Eataly - Company Data and Interim Estimates</b>							
<b>Eu mn</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016E</b>	<b>2017E</b>	<b>2018E</b>
<b>Sales</b>	186	226	307	395	420	565	750
<b>YoY%</b>		21.8%	35.8%	28.6%	6.3%	34.5%	32.7%
<b>Ebitda</b>	20.2	19.4	22.6	29.0	36.0	50.5	71.0
<b>%Margin</b>	10.9%	8.6%	7.3%	7.3%	8.6%	8.9%	9.5%
<b>Ebit</b>	13.6	11.5	9.1	13.0	15.0	22.0	32.0
<b>%Margin</b>	7.3%	5.1%	2.9%	3.3%	3.6%	3.9%	4.3%
<b>Net Income</b>	8.4	5.9	3.1	5.0	7.0	10.0	15.0
<b>Stores</b>				30			38
<b>Sales per store</b>				13.2			19.7
<b>NFP</b>				25.0			-45.0

Table 2: Eataly's growth and forecast - Source: linkiesta.it, 2016

### 6.1.2 Recent expansion

2016 was a very important year for the company, that greatly expanded internationally. After the huge success of the first New York store, which is managed with the partnership of Mario Batali, Joe Bastianich and Lidia Matticchio Bastianich, a second store was opened in New York in August 2016 inside the new 4 World Trade Center. On November 29, a 4200 square meters store with 500 employees centered around fish was inaugurated in Boston, while the Copenhagen store was opened inside the famous shopping center Illum on November 17. These openings came after those of Munich, São Paulo, Dubai and Istanbul. Future openings will include Toronto, Las Vegas and Los Angeles. The store in Los Angeles is a very important location, the opening is highly anticipated and the U.S. market is very profitable for Eataly, with the store in Madison Square Park being a profit leader and the store in Chicago matching the sales of the flagship store in Turin (Carr, 2015). Farinetti declared that Eataly's growth will not stop there, as plan for future expansion include China, India and the Far East. The final goal would be to be in Every country in the world, per the founder's words (Insalaco, 2017).

For a company that is expanding so rapidly, preserving the brand value and achieving consistency across countries is of paramount importance, since this fast international expansion brings many risks, especially with regards to coherence with the original philosophy.

## **6.2 Slow Food as a reaction to social acceleration**

The Slow Food movement can be interpreted as an effect and a reaction to social acceleration. This is immediately perceivable at a first level of analysis: the name itself which contains the adjective “slow” as opposed to “fast”, and specifically fast food. As previously discussed, the movement was born as a way to oppose and fight the proliferation of the fast food model.

However, there is more to it than the simple fast and slow food opposition. As declared in the movement manifesto (1989), fast food is only a symptom of a bigger “problem”, speed, which becomes “like a chain or a virus that affects everybody”. The “Fast-Life” forces people to change their habits, to feel lost, to eat fast food.

This notion of speed that the movement wants to oppose appears closely linked to the fundamental acceleration problem and its consequence on individuals as presented by social acceleration theorists. The Slow Food movement appears to be fighting a much bigger battle against the “frenetic standstill”, phenomenon that forces people to do things they do not want to do (like eating fast food, according to the movement) and that is the cause of an overall loss of identity and cultural values.

Moreover, the reaction against this “speed in the name of productivity” could start with food, as food would be one of the possible way to fight the whole acceleration phenomenon. There is more to the notion of conviviality promoted by the Slow Food philosophy than the simple enjoyment of a meal around a table. Conviviality means finding the time to share knowledge across generations and to recover traditions, therefore impacting the process of cultural production and identity formation that seems to be endangered by social acceleration.

## **6.3 Eataly and Slow Food: a controversial relationship?**

Eataly’s relationship with Slow Food can be seen as the maximum expression of the integration of a philosophy in a business model, as well as a solid example of the adoption of a brand ideology, that led to a radical change of the relationship with suppliers into something that is completely different than the usual conflictual/exploitative model.

From traditional practices and in this sense, social movements like Slow Food are usually considered some sort of enemies, opponents of companies and their commercial logic. Therefore, it’s usually argued that companies put ideologies at the service of brands for



commercial purposes, which is inherently true as profit and growth are usually the driving forces of most companies. However, the issue might become quite problematic whenever the ideology adopted has some strong ethical connotation and, as analyzed before, ethical consumption is a particularly critical topic in relation to food choices.

Social movements like Slow Food can take the form of social stances and become strong enough to stimulate and encourage ethical behavior from companies. Eataly is exactly an example of how consumer activism can lead to the adoption of an ethical ideology by a brand (Sebastiani, Montagnini, & Dalli, 2013). However, tension often builds up between the members of a movement and the companies that want to collaborate with it (Gendron, Bisailon, & Rance, 2009), therefore this collaboration is not always without problems and presents both positive and negative aspects.

From the very beginning Slow Food helped Eataly's founder in selecting the first core suppliers, 18 small producers who have direct control on the quality of their own products and over the production process as well. By establishing a contact directly with them and cutting on the intermediaries, Eataly retains control over those aspects. At the same time, it maintains a positive relationship by sharing cultural values with the suppliers, values that it then tries to teach to employees and especially customers through educational programs. Slow food helps guarantee that ethical behavior is respected by certifying suppliers, by helping define the assortment and selecting the content of the communications inside and outside the store. Eataly was therefore born as an attempt to balance large-scale retail practice and ethical values appreciated by a cluster of customers (from the Slow Food movement), to take high quality, ethical food out of a niche and into the mass market.

A first problem that might be pointed out is that, despite modern consumers often specify how they care about ethical behavior by companies, this declared intent and preference is not subsequently translated into an actual purchase decision (attitude-behavior gap). Many factors might influence this phenomenon, and among the others social desirability of the declaration, possible lack of quality of the product, effort required to find it and general lack of availability and information, as well as high price. By building an environment where ethical products are easy to find, to read information on, certified as high quality and priced in a fair way, Eataly wants to be the format that works around these problems and connects ethical products to the customers (although discussion might be made on the "fair price" aspect).

However, research by Sebastiani et al. (2012) underlines how the relationship between the movement and the company is not always harmonious as there are both supportive customers and at the same time skeptical ones. Some customers do believe Eataly is an excellent and maybe the best possible compromise between the exploitation of commercial opportunities and ethical intent and are willing to accept the compromise as inevitable, others distrust the company's commercial intent, they view it more as a "trendy" phenomenon, and they believe more in people who will be with time more and more educated and thus able to make conscious food choices despite the context they are thrown in, whatever the supermarket. Some participant in the slow food movement regarded Eataly as a company with great potential and solid roots, but where nevertheless worried that the rapid expansion could endanger the coherence between the ethical commitment and the reality.

Further research by Montagnini & Sebastiani (2013) shows how some of the more morally committed customers indeed perceive a low level of coherence between the philosophical premises and the formula adopted.

It might be argued that embedding Slow Food philosophy was more of a way for Eataly to be able to create an environment that offers a unique purchasing experience while trying to address the attitude-behavior gap and thus answering needs not addressed before, among the which the desire to be more involved. Eataly also spends great effort to tell customers that high quality food is expensive to produce, preserve and bring to the store and therefore that the price chosen are fair. However, as the educational aspect is perceived by customers as secondary when compared to the other two (shopping and eating) (Montagnini & Sebastiani, 2013) the success in making prices perceived as "fair" might be further discussed.

## **6.4 Eataly's contradictions**

As discussed before, Eataly presents itself as a company with a strong ethical stance that is translated into a clear brand ideology with strong ethical connotation taken from the Slow Food movement. However, when all the brand choices are considered, some contradictions might be observed.

### ***6.4.1 Brand Luxury logic vs Farmer's Market model***

Eataly's is associated with high quality products. As per the empirical evidence gathered (questionnaire A) this association with quality is much stronger than the association between Eataly and ethical behavior. Therefore, the high-quality standard is one of the most

important thing the customers expect from the brand. This is usually translated in an assortment of products from local producers selected based on controlled standards and manufacturing process. By taking this aspect into account, some considerations can be made:

- The high-quality standard is respected and generally clearly perceived by the customers
- Some of the brands present in the store are already known by customers and considered luxury brands associated with high quality standards.
- Some of the brands in the assortment are less known by the mass market since they belong to small scale producers and were previously appreciated only by a niche market, therefore the store brand (Eataly) assumes a much higher importance in becoming the cognitive bridge between the customers and the products exposed, even though Eataly's brand is not directly expressed on the products and the logo not overly displayed. Eataly can thus avoid resorting to private labels in accordance to its guiding philosophy while still exploiting some of the benefits of this practice. Customers will trust Eataly when it comes to being sure that the product on the shelf is a high-quality product, and by shopping or eating there they can safely assume they are buying some "good, clean and fair" food.
- The various product selected become part of Eataly brand ecosystem and are then displayed in a very orderly matter, very appealing for the eyes. Overall the store is designed to look very differently than modern supermarkets, where the space is organized so to optimize the quantity of products on the shelves and maximize efficiency. Eataly ought to look like a traditional marketplace instead, with small stands, stalls and a coherence in the codes used throughout all the store. The environment conveys an idea of premiumness.
- The high prices further help convey this feeling. Farinetti noted that the difference between the price for a premium offering and the average price for a non-premium offering in the food sector is not so pronounced, however it is nevertheless present. Another point underlined by Eataly many times is that the prices are not higher per-se, but as a consequence of the higher costs necessary to produce, preserve and deliver high quality food. Therefore, the prices should be perceived as "higher but fair". Thus, the ethical principle of "fairness" towards small-scale producers is embedded in the pricing process. However, Eataly is not a non-profit organization and

therefore the company's own margins are included in the price decisions. Consequently, Eataly's prices can't help but being perceived as premium, when not "dear" and "expensive", by the bulk of the market (evidence from questionnaire A reinforce this idea)

When those aspects are considered altogether, they convey a strong image of Eataly as a Luxury brand. This stands in direct contradiction with the company's declared intention of being "open to everybody" and targeting 90% of the market in order to build the so-called "democracy of quality" that Farinetti envisioned.

Another aspect that stands in direct contradiction with this brand luxury logic is the emphasis Eataly is putting on the central role of the suppliers. As per Eataly's intent, the company's own brand should be de-emphasized to let the products and the producers behind them speak. This idea would move Eataly closer to a "farmer's market" model, which is becoming very popular lately and reminds again of a traditional marketplace, where farmers and local producers sell their products at low prices to the population. In this sense the humble connotation of the model puts it in a diametrically opposite position compared to the aforementioned brand luxury logic.

Eataly is not only implicitly relating to this model, but is explicitly adopting it. To strengthen the relationship with the supplier in Southern Italy, Eataly recently launched in 2016 a new project called "Porta del Sud: The Producer's Piazza" for their store in Bari (PR Newswire, 2016). Since there are many small and local producers that want to get an opportunity to make themselves and their products know to the bulk of the market, this project represents a great opportunity for them as well as another way for Eataly to walk towards the goal of empowering small traditional producers.

The Piazza is open to 10 small businesses each month, which are to be selected with the usual collaboration of Slow Food. The purpose is to raise awareness alongside the supply chain and to give the producers an opportunity to tell their own story (as declared during the interview with the company). Since Eataly has plans to diffuse this kind of initiative throughout the shops as well as to export it abroad, discussion can be made on whether or not the "authenticity" of it can be preserved, or if it is instead bound to become another building block of the "authentically designed" experience Eataly wants to propose to customers.

#### **6.4.2 Italy vs International expansion**

Another building block of Eataly's ideology is the close tie to territory, which is from the very start at the very core of Eataly's choices. The initial idea was to re-discover the Italian tradition, to celebrate it and to select high quality food with a strong link to the territory. Eataly's purpose was therefore to be 100% Italian and to educate customers to appreciate the unique Italian food tradition as opposed to modern and globalized fast food trends.

However, from the very beginning Eataly has a strong international connotation. It started expanding internationally just one year after being founded. The name itself, which is expressed in English, was a hint in this direction.

When you consider Eataly's positioning in an international context, it becomes clear that there are very different associations to the brand compared to what happens in Italy. In the first place, the whole proposition about "re-discovering your traditions and the history of food" is replaced by the idea of discovering a country, Italy, and the true Italian food experience. Therefore, Eataly abroad becomes a sort of ambassador of Italy, leveraging on a strong Made in Italy effect. Through its restaurant, its communication style and its educational programs Eataly somehow pledges to capture and represent Italian culture (Edwards, 2015).

Some elements are standardized while others are adapted across countries, according to a "think global, act local logic" (Ankeny, 2014). It can be determined (interview), that what remains unchanged is the "eat, shop and learn" triple contract and the underlying "clean, fair and good" ideology, as well as part of the products on the shelves, namely the ones that can be imported from Italy (dry products).

What changes is the space available (e.g. only 34 square meters in Japan), the buildings, some aspects that must be adapted to local cultural factors and beliefs, and fresh products that are still selected from local producers but treated with traditional Italian procedures.

It might be discussed whether Eataly in Italy and Eataly abroad are the same thing in terms of brand message, as the sheer strength of the Made in Italy aspect may be hinting a slightly different brand contract, with a "discover and learn Italy (by eating, shopping and learning)" connotation rather than "discover tradition and recover culture (by eating, shopping and learning)". However, further consumer research might be conducted on this topic to verify the contradiction.

### **6.4.3 Small and local suppliers/storytelling vs Sheer size**

Another apparently contradictory aspect of Eataly is the sheer size of the stores which stands in direct contrast with the small dimensions of the local producers that Eataly celebrates, which are largely used as a basis for storytelling as well. On this issue, three observations can be made:

- First, Eataly is doing an extensive job in selecting a wide network of local suppliers in order to satisfy the demand and to have enough products on the shelves. For this reason, with the help of Slow Food, Eataly selected hundreds of producers throughout the years. The idea is buying less from more suppliers rather than buying a lot from a single one. This strategy, coherent with Eataly's core philosophy, is without doubts one of the drivers of the company success.
- The second point is connected to the one just mentioned: there is a downside to selecting more suppliers and in buying less, as this is bound to increase costs. Eataly is partly answering to this problem by streamlining distribution and dialoguing directly with the producers, which is also more coherent with the ethical stance as it allows for "fair" prices to be paid to suppliers. However, this is necessarily driving up transportation costs and the environmental cost associated to it. As previously discussed, this might be contradicting one of the Slow Food philosophy purposes: "clean". It might also impact the prices, driving them up and thus making them harder to be perceived as "fair", but rather as "expensive".
- The third issue is more of a philosophical problem: isn't celebrating small-scale producers in a large-scale retail context inherently contradictory? Meaning that the simple fact that a strong brand as Eataly is needed to market those products in a large-size architecture is probably partly devaluing the small producers themselves, thus contradicting Eataly's intent of celebrating them.

## **6.5 Eataly and the recent trends**

In this section, it will be underlined how some of Eataly's choices, although innovative, might be interpreted as responses to trends already present in the market and less as original ideas that are going to disrupt large-scale retail by educating a new generation of customers. It might be argued that this new generation of customers already exists and thus Eataly's success could be explained as a coherent and timely response to previously unanswered needs.

### **6.5.1 Merging retail and restaurants**

One of the trend that can be observed recently and that Eataly was able to capture is food channel migration. In other words, food retail and restaurants are merging in what can be defined as the “grocerant” niche (Johnson, 2016; Duff & Phelps, 2016). Many retailers today are offering ready-to-eat solutions and they are gaining competitive advantage in the process, while customers are getting used to the new model. Therefore, in the future the grocerant combination might become a new industry standard.

Historically, restaurants have been proven to be quite slow to react to changes, as they stick to traditional models without adopting new practices. This slowness might prove detrimental for the business in the accelerated society, which has seen first the rise of the fast food model and now possibly the birth of a new model and a new source of competition. On the other hand, Eataly is born by leveraging on this disappearing dualism.

Another explanation for this merge might be the raise of non-traditional meals. On the one hand, time constraints are changing the way people spend their meals, and yet again the need to exploit the time available as much as possible and to do more things at the same time is increasing the demand for convenience, thus explaining the proliferation of hybrid solution that allow people to do both things (the familiar eat and shop) in the same place. Quite ironically, Eataly’s model, which is declared to be “a return to tradition”, might be capitalizing on one aspect that is all but traditional and quite modern instead, which can be attributed to the advancement of social acceleration.

Of course, one of the positive side of this transition from a grocery shop to a grocerant is the potential for synergies and cost saving, but there’s more to it. The customers might feel empowered by it as they can enjoy a higher level of freedom (e.g. they can decide to take a break and eat something, they can try some food before purchasing it) and therefore enjoy more the experience as a whole. The practice can also further empower the retailer’s brand and offer some opportunities for differentiation and unique brand positioning, concepts that are very familiar to Eataly.

### **6.5.2 Eataly and the recent food trends**

Eataly’s position in relation to some of the trends previously presented in paragraph 3.2 can be further analyzed.

**Fresh food, vegetables and healthy food:** as the demand for healthy and fresh food is increasing, Eataly's selection of good and fresh food looks like a timely and appropriate reaction to this trend.

**“Convenient” food:** one of the most controversial aspect is the raising demand for convenience which can be observed and evaluated as a symptom of social acceleration. It's one of the aspects that characterize contemporary society as opposed to traditional way to consume food. Eataly is advocating a return to tradition and at the same time providing a format that satisfies the demand for convenience, by integrating grocery shopping and restaurant and thus allowing people to consume prepared meals in-store.

**Local and traditional food:** this is probably one of the trends Eataly is most openly addressing: recovering tradition through food produced locally, which is done thanks to a careful selection of a local network of suppliers. As mentioned before, even the stores that are outside Italy rely on an extensive network of local producers to allow Eataly to keep the products fresh and local, while at the same time asking producers to respect Italian standards in the manufacturing process.

**The demand for ethical behavior:** this aspect has been extensively discussed, as the food proposed at Eataly is supposed to be “clean, fair and good”. Eataly has adopted this pretty strong ethical stance in accordance with the Slow Food social movement, which can be seen as an example of the diffused tendency from group of customers to ask companies to behave ethically.

In addition to answering to these trend, Eataly is also aware that purchase decision is driven less by the product itself and more than the experience as a bundle and, as discussed before, the company is making extensive use of experiential marketing to create a unique customer experience. When these factors are considered, a pretty solid picture of Eataly as “trendy” can be drawn.

### **6.5.3 Eataly's “traditional innovation”**

Eataly tries to merge the strong points of the modern retail logic (e.g. size, strategies, shop management), with the characteristic of small traditional shops (Montagnini & Sebastiani, 2013). In this sense, it can be said that Eataly wants to innovate by turning back to tradition, whereas tradition and innovation are usually seen as opposites (Venturini, 2010), as extremes of a continuum. It can be argued that contemporary society has seen the raise in



the demand for a return to tradition, therefore Eataly's model can be interpreted as a compromise or as one of the possible answers to this need.

Traditional shops might be intended as those that serve traditional (small) communities and sell traditional products only. This typology of shop has been driven into a niche by large-scale retailers and has often been defined as "at risk of extinction". On the opposite extreme of tradition lies innovation as proposed by the ever transforming modern logistic.

Innovation is closely connected to an idea of progress, of moving forward. Up till the last century progress was mostly seen as a positive phenomenon, while recent sociological literature recognizes the limitations of the case. Progress as interpreted with social acceleration might even assume some darker and/or negative connotation, as people are no longer enthusiastic for the future but show a great deal of uncertainty instead, whereas technological advancement is not sufficient to provide comfort anymore. Some "nostalgia" effect can be detected as more people find more comfort in the memories of the past rather than in the hopes for the future.

Some elements assume particular importance when distinguishing between modernity and tradition:

- Modernity brought a multiplication of elements on various levels (e.g. more actors, more issues, more options). In this sense returning to tradition means to cut, to reduce those elements to what is essential. Eataly tries to do this on various levels: less players in the supply chain, less variety on the shelves, less quantity (buying less but buying better)
- Modernity is characterized by new ways to diffuse information, which is immediately available, or liquid (Bauman, 2000). As much as Eataly makes good use of the new medias to spread the message, it also tries to turn back to traditional storytelling in-store to communicate with the customers, akin to traditional shops where the owner is the storytellers that manages the relationship between the customer and the product.
- Modernity is often seen has an evolutionary process where the stronger survives after exerting power. Eataly's intent is to work around this model and instead building its growth on shared cultural values and cooperation with suppliers.

However, to successfully integrate innovation and tradition, Eataly should pay attention to two aspects: in the first place, it should transform modern logistic and organization to

move them closer to dynamics of traditional distribution. In the second place, it should transform traditional productions in order to make them compatible with the large-scale retail format. Those two points are risky and somewhat contradictory, as to respect the first condition Eataly must be able to compete with other supermarkets, going beyond the luxury niche, and to satisfy the second it must be careful not to be overly successful in transforming traditional distributors so much that they lose their specificities and thus can no longer be considered traditional.

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## 7. QUESTIONNAIRES DISCUSSION

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### 7.1 Evidence from questionnaire A

The first questionnaire was submitted directly to 40 customers outside Eataly's store in Monticello (Piedmont). Some of the key results from the questionnaire will be presented here, to back up and confirm some of the aspects that were discussed chapter 6.

One of the advantages of the location chosen was that it is very close to Bra, the city where Slow Food was born. Therefore, Eataly's customers there were quite familiar with the Slow Food movement and the slow food philosophy. In fact, more than 75% of the respondents declared to be familiar with Slow Food. Those customers were then asked to rate on a 1 to 5 scale the coherence between Eataly's and Slow Food philosophies. The perceived level of coherence is quite low, with an average of 2,16.

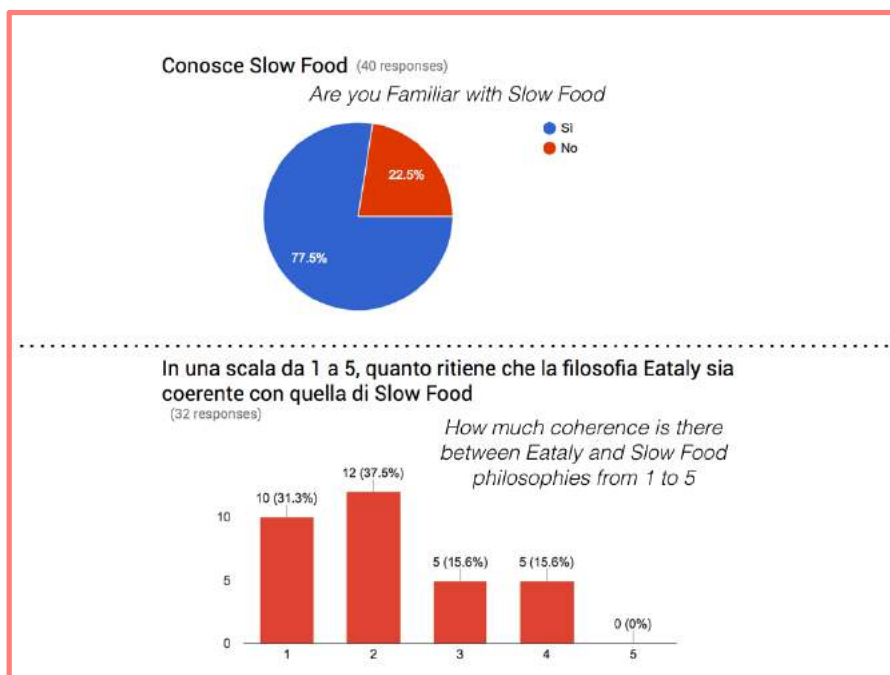


Figure 16: Perceived coherence between Eataly's and Slow Food philosophies - Source: original questionnaire, 2017

This result is coherent with the discussion of paragraph 6.3. Customers, especially well informed ones, do not perceive Eataly to be very coherent with the philosophy adopted.

Further evidence can be found in the answers to another question, where respondents were asked to agree or disagree with the statement "Eataly has strong ethical values". The aver-

age coefficient of 2,65 out of 5 suggests the tendency to slightly disagree with the statement. The interpretation that can be given is that Eataly is not perceived as ethical, or at least not in a strong way. Another indicator of this might be the fact that customers seem not to identify much with the values of the brand. Although this data is open to different interpretations, identification with the brand values is not seen as an important reason to go to Eataly, with a strong tendency to disagree among customers (coefficient 1,45 out of 5).

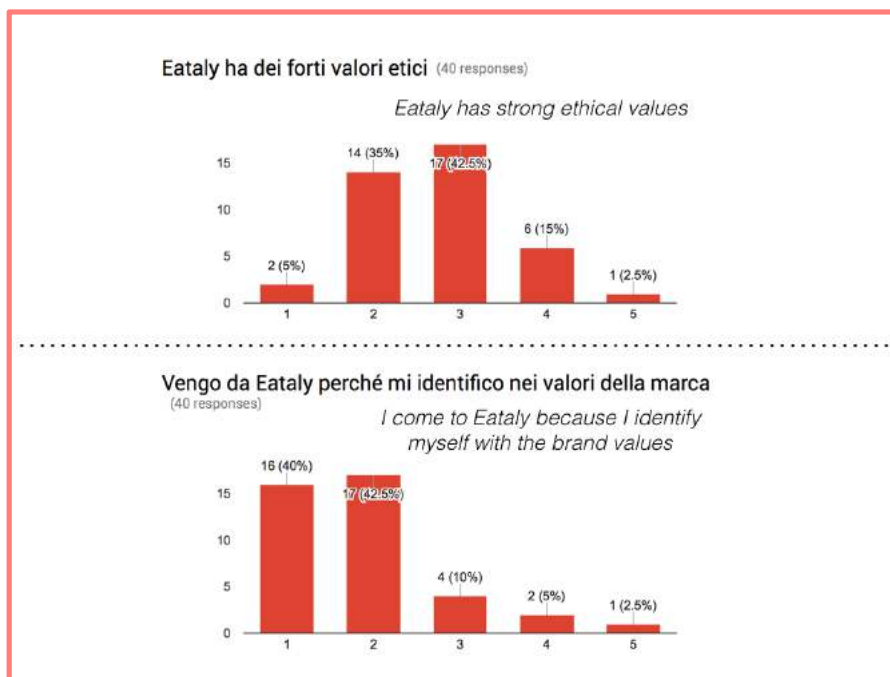


Figure 17: Eataly's perceived ethicality - Source: original questionnaire, 2017

It is interesting to note that Eataly has without doubts reached the goal of authoritativeness in terms of quality of the offering. Indeed, customers strongly agree (coefficient 4,53 out of 5) with the statement that Eataly's products are high quality.

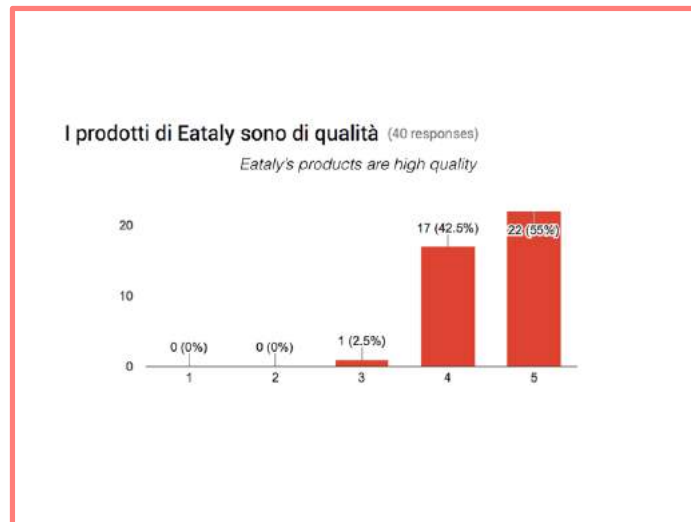


Figure 18: Eataly's perceived quality - Source: original questionnaire, 2017

While quality is undiscussed, the same cannot be said for prices, which are perceived as “expensive” (coefficient 4,25). However, Eataly’s customers seem to be familiar with the idea of paying a high price for the high quality they recognize in the products, therefore they don’t disagree with the fact that Eataly’s prices are “fair”, here interpreted more as the “right” price for the offering (although they do not agree either, with a 3,28 coefficient).

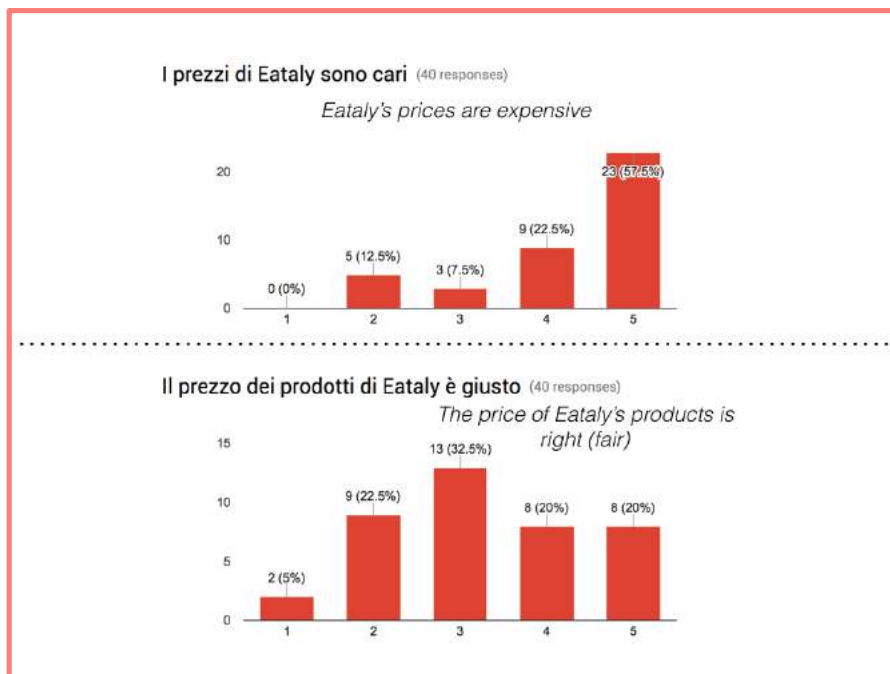


Figure 19: Eataly, perception of prices - Source: original questionnaire, 2017

One of the most interesting results is that Eataly is strongly perceived as “cool”, both in terms of shopping and eating experience. This might be an indicator of the evaluation of Eataly’s experience as a whole and might be interpreted as Eataly being perceived as “trendy” or even “premium” (average coefficient for retail and restaurant 4,52).



Figure 20: Eataly's perceived "coolness" - Source: original questionnaire, 2017

Some interesting interpretations can be made when combining some of the previous results, when ethical values, quality and “coolness” are considered together as possible drivers of Eataly’s attractiveness. A first analysis on the relative importance of these factors shows an equal weight of product quality and coolness (41%) and a much smaller importance given to ethicality (18%) (an average coefficient of 2 for ethicality has been calculated).

This result can then be compared to the answers to the multiple-option question “what drives you here at Eataly instead of going to another shop or restaurant”, where 20% of the respondents chose “product quality” and 27,5% chose “nice place/environment”. Interestingly the first choice with 32,5% of the preference - was “food I cannot find anywhere else.” All things considered, it looks like the uniqueness of Eataly’s offering, the high quality recognized and the “trendiness” of the setting are the real drivers of Eataly’s success, as opposed to ethical values, identification with the brand ideology and recognition of the Slow Food philosophy, which is probably the most contradictory aspect.

## 7.2 Evidence from questionnaire B

Questionnaire B was open to everybody and was answered by 124 respondents between the age of 17 and 85 across 11 countries. The primary purpose of the questionnaire was to verify and confirm some of the food trends presented in paragraph 3.2, like the importance attributed to freshness, the preference towards natural/organic/bio food, the attention to ethicality and respect of tradition, the trend for “local” food and the high importance attributed to food quality.

Respondents were asked to rate the importance of the different attributes on a 1 to 5 scale and then the frequency of actual consumption on the same scale. Although the average results show a central tendency (as expected), the questionnaire results suggest two interesting aspects: in the first place, the high importance generally given to the attributes and in the second place the presence of a pretty pronounced attitude-behavior gap.

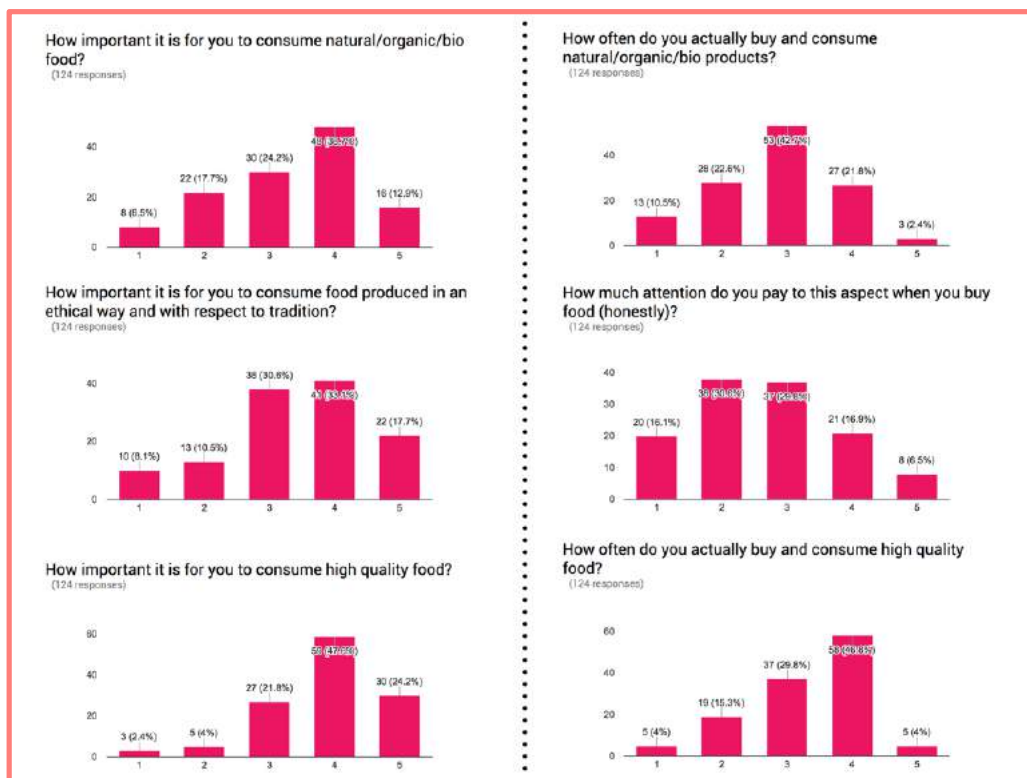


Figure 21: Attitude-behavior gap - Source: original questionnaire, 2017

For example, for natural/organic/bio food an average importance coefficient of 3,34 is registered, while the frequency coefficient is 2,83, with a 0,5 gap. The coefficients for high quality food show a similar gap (3,87 vs 3,31), and the gap for ethicality is even wider (3,41

vs 2,35). This represents further evidence that the success of Eataly can be partially attributed to the ability to devise a brand architecture capable of addressing the attitude/behavior gap around these dimensions, therefore better leveraging these trends.

Regarding the trend for “local”, results show less consistency. This might probably be attributed to the ambiguity of the term, which might be interpreted as “produced locally” as well as local as in “food from the place you are/non-ethnic”. The second interpretation might diminish the average coefficient, whereas the first might be associated with freshness instead, and the results show a pretty high importance attributed to this last aspect.

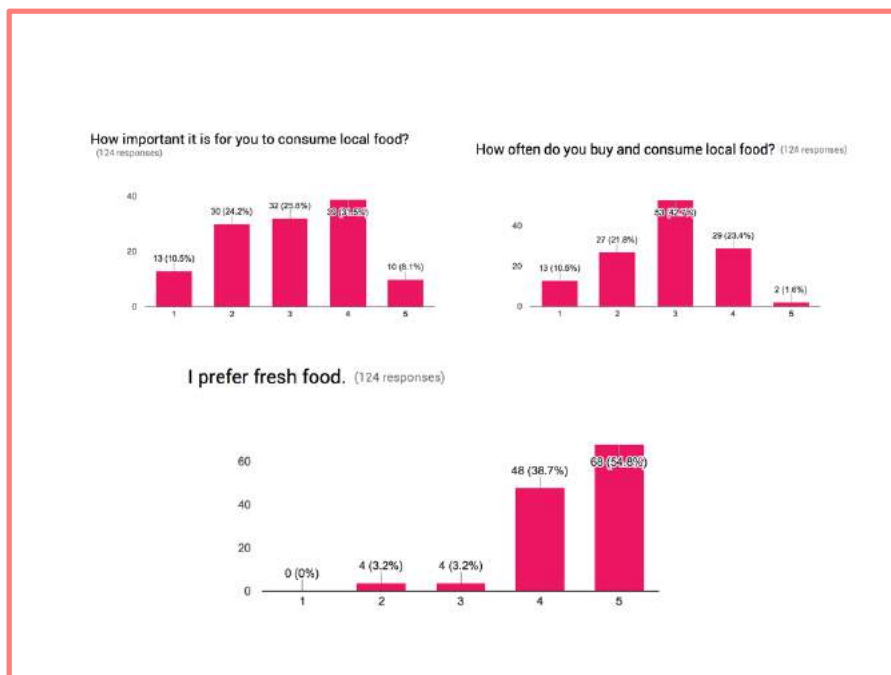


Figure 22: Local and fresh food trend - Source: original questionnaire, 2017

The questionnaire confirms one more time the high importance attributed to quality, and underlines that consumers still associate high quality more with small shops (3,45) than with supermarkets (3,15). However, this difference is less pronounced than what one might expect.





Figure 23: Quality, supermarkets vs small shops - Source: original questionnaire, 2017

Among the different drivers that can influence purchase decision, a lot of importance was attributed to “information about the products on display”, which was selected by 50% of the respondents, underlining again the need for transparency and the possible role of storytelling, two aspects whose importance is very well known to Eataly. The second driver for importance is the attractiveness of the food stand (35% of the sample), another confirmation that the “visual” part is decisive in influencing purchase.

Another interesting aspect that emerged was the generally diffused perception of “lack of time”. The respondents were asked to agree or disagree with some statements and showed a strong tendency to agree with the statements about time and flexibility.

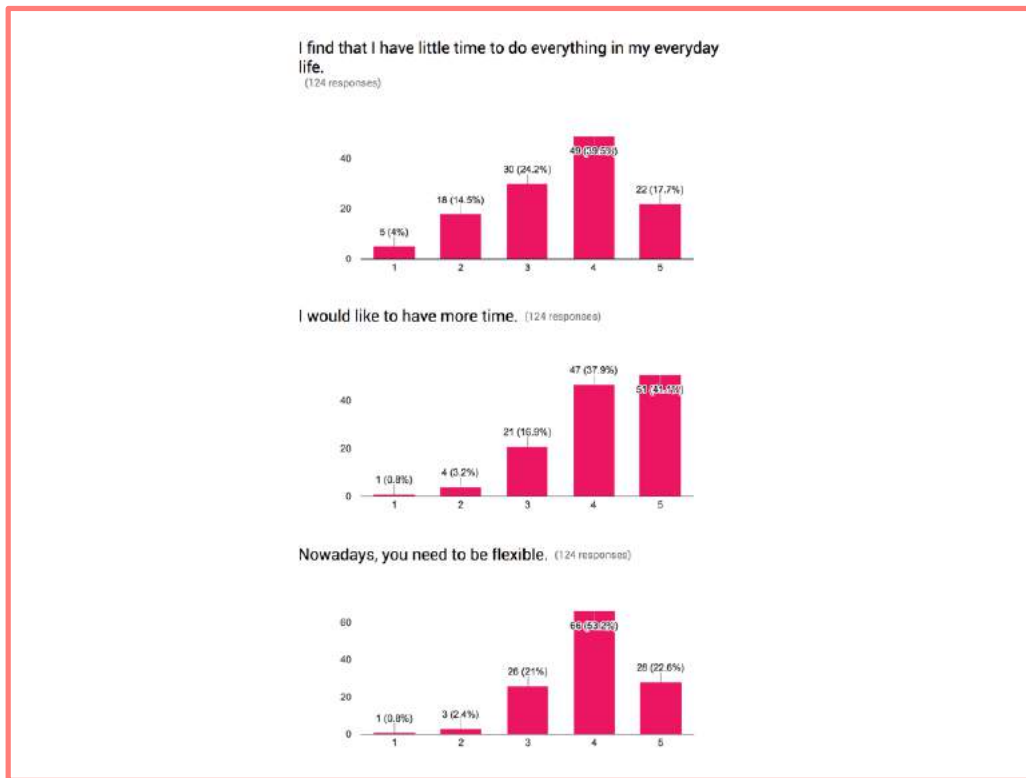


Figure 24: Social acceleration effects - Source: original questionnaire, 2017

As much as the claims of the social acceleration theory about the general feeling of lack of time and the need for flexibility seem to be finding a confirmation in these results, further research might be needed in the future to better investigate the impact of these variables on consumer trends and in regards to food consumption in particular.

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## 8. CONCLUSIONS

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### 8.1 Limitations and further research

This research is not free from some important limitations:

In the first place, social acceleration theory has been presented in a descriptive way as an interesting perspective to analyze the social context and to explain the birth of movements like Slow Food as a reaction to the speed of contemporary life. However, further discussion on social acceleration belongs to sociology and lies outside the scope of this research. Moreover further analysis and efforts could be made in the future to determine the implication and the possible relation between social acceleration and business, as well as the impact of this phenomenon on consumer trends.

In the second place, to conduct a better analysis on Eataly's brand, it might be interesting to visit more of Eataly's stores and to make a comparison between the stores in Italy and abroad. This might provide new perspectives on the topic which were impossible to explore in this work. Analyses on Eataly's assortment that have been left outside of the scope of this work could contribute with new points for reflection as well.

The questionnaires present some limitations as well: questionnaire A was submitted to a limited sample of customers outside one store. Although the location chosen presented some advantages in terms of familiarity with the Slow Food philosophy, and although there is consistency across Eataly's store, consumers' perception of Eataly might vary across locations, thus it might be interesting for the future to conduct the same questionnaire outside other stores to compare results and identify eventual differences. Questionnaire B presents some limitations in terms of sample, which was limited in number (n=124) and composed for the most part by millennials (25% of the respondents are 24 years old). Moreover, although the sample is international, more than half of the respondents are from Italy. In general, the research could greatly benefit from further development of these questionnaires as well as from ulterior analysis to be conducted on the results.

The results of this research derive from a single case study, therefore generalization could be made but not without attention. Further research might be needed to investigate the possible combination of commercial growth and ethical brand ideologies.

## 8.2 Synthesis of results

The main hypothesis to be tested with this work was whether Eataly's growth is contradicting the Slow Food ideology that stands at the basis of the brand. Some aspects have been discussed to analyze this contradiction:

- The fact that this ideology was a very important building block of the whole brand strategy (and perhaps the most important) was made clear during the case study analysis, when Eataly's brand was analyzed.
- As presented in paragraph 6.2 the ideology chosen, Slow Food, is a philosophy with strong ethical connotations that can be interpreted as a reaction to social acceleration. On the other hand, Eataly is growing in an incredibly fast way in line with the fast pace of the "accelerated" society, and thus appear far from being "slow" in the way the movement advocates. This can be interpreted as a first sign of the contradiction.
- This is further confirmed by the relationship between Eataly and Slow Food, which appear controversial as presented in paragraph 6.3. The results from questionnaire A reinforce the idea that the coherence between the brand and the philosophy is perceived as low, especially when the customers are familiar with the Slow Food movement.
- Some contradictions between the size/commercial intent and the ethical stance have been pointed out in paragraph 6.4 as further demonstration of the risks of such an aggressive expansion strategy poses for the coherence with an ethically grounded brand ideology.

When all these factors are considered, it feels safer to affirm that Eataly's growth is contradicting the ideology, that the ethical stance gets somehow lost and some different factors can be considered as the true drivers of Eataly's growth, such as:

- The wise use of experiential marketing
- The extensive use of storytelling to answer to the need for transparency and information (as emerged from questionnaire B)
- The strong association between the brand and the concept of quality Eataly was able to build (as emerged from questionnaire A), which is the product of the brand choices as previously analyzed. The authoritativeness Eataly declares to have in terms of quality is perceived by customers.

- The uniqueness of the offering and the perceived “trendiness”.

On this last point, some further discussion can be made, as trendiness can be interpreted in two ways: in the first place, in relation to “coolness” and to the creation of a “trendy” and good looking environment that positively influences purchase decisions and/or communicate a sense of “premiumness”. Secondly, Eataly can be seen as trendy as in “the first to be able to capture and react to unanswered trends”.

This last point is connected to the secondary hypothesis tested: it is not really necessary to spread the quality/traditional/ethical message in a sort of evangelical way. This claim is supported by the results of questionnaire B that show that consumers already attribute a very high importance to quality when making their food choices. Some further discussion has been made (paragraph 6.5) on the fact that Eataly is capitalizing on some existing trends both in the characteristics of its food offering and in the format chosen, with the advocacy of a return to tradition and the adoption of the “grocerant” model.

### **8.3 Conclusion**

Can a food retail company achieve fast growth in the social acceleration context while remaining true to a “slow food” brand ideology? This was the question to be answered with this research. Evidence from the Eataly case seems to be giving a negative response.

Having a strong and clearly stated ideology greatly improves the general strength of the brand, as well as the overall coherence, however some of the strongest ethical implication seem to be lost in the name of fast growth and international expansion. As anticipated, further studies might be needed to better understand if it is possible to combine fast commercial growth with a brand ideology with strong ethical connotations without distorting the latter, as the results of this research suggest that in doing so a company is bound to incur in contradictions, and that the adoption of an ideology might be just another way to be “trendy” and appeal customers.

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## AFFIDAVIT


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..... (Print name)

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## **APPENDIX**

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6. **Quanto è importante per lei che il cibo sia prodotto in maniera etica e nel rispetto delle tradizioni**

*Mark only one oval.*

	1	2	3	4	5	
Mi è indifferente	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Molto importante

7. **Quanta attenzione presta effettivamente a questo aspetto quando fa la spesa (onestamente)**

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. **Conosce Slow Food**

*Mark only one oval.*

Sì

No

9. **In una scala da 1 a 5, quanto ritiene che la filosofia Eataly sia coerente con quella di Slow Food**

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Quanto si ritiene d'accordo con le seguenti affermazioni**

1=per niente d'accordo, 2=non molto d'accordo, 3=indifferente, 4=abbastanza d'accordo, 5=molto d'accordo

10. **Il prezzo dei prodotti di Eataly è giusto**

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. **I prezzi di Eataly sono cari**

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**12. I prodotti di Eataly sono di qualità**

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**13. Eataly ha dei forti valori etici**

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**14. Vengo da Eataly perché mi identifico nei valori della marca**

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**15. Fare la spesa da Eataly è figo**

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**16. Mangiare da Eataly è figo**

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Grazie! Solo un ultima cosa...**

17. *Mark only one oval.*

M  
 F

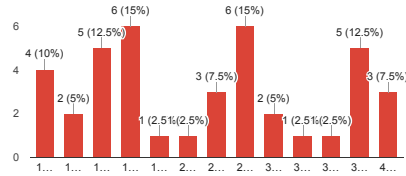
18. **Età**

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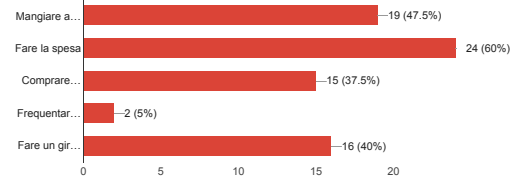
## Questionario Clienti Eatly

40 responses

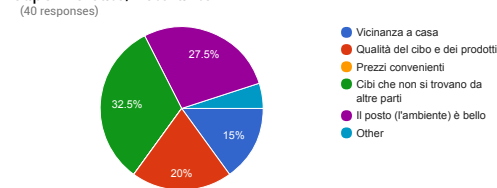
Con quale frequenza si reca da Eatly? (40 responses)



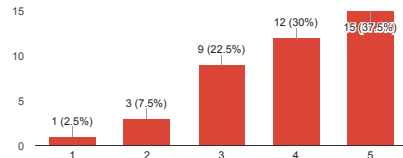
Quali attività svolge da Eatly con maggiore frequenza (40 responses)



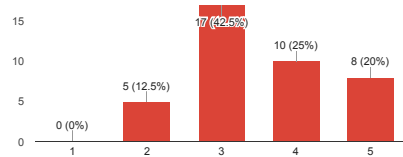
Qual'è la ragione principale per cui sceglie Eatly rispetto ad un altro supermercato/ristorante? (40 responses)



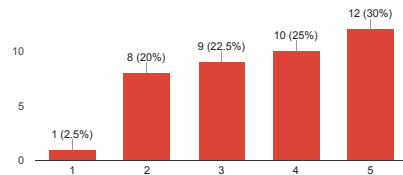
Quanto è importante per lei consumare cibo di qualità (40 responses)



Con quale frequenza effettivamente consuma cibo di qualità (40 responses)



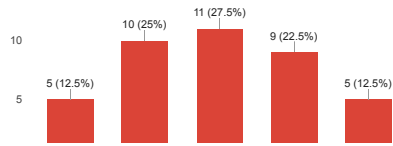
Quanto è importante per lei che il cibo sia prodotto in maniera etica e nel rispetto delle tradizioni (40 responses)



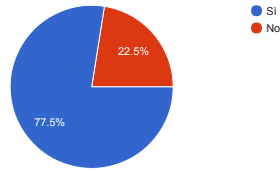
Quanta attenzione presta effettivamente a questo aspetto quando fa la spesa (onestamente) (40 responses)

(40 responses)

Questionario Clienti Eataly

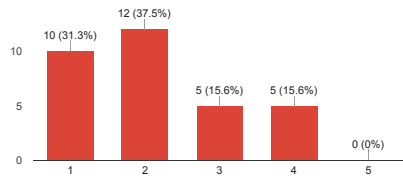


Conosce Slow Food (40 responses)



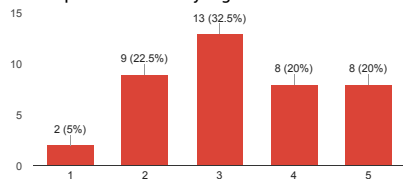
In una scala da 1 a 5, quanto ritiene che la filosofia Eataly sia coerente con quella di Slow Food

(32 responses)

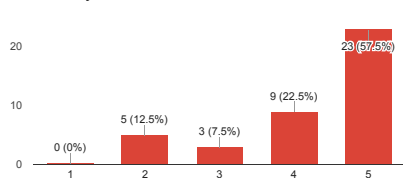


Quanto si ritiene d'accordo con le seguenti affermazioni

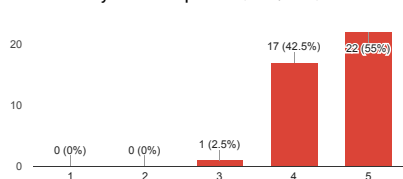
Il prezzo dei prodotti di Eataly è giusto (40 responses)



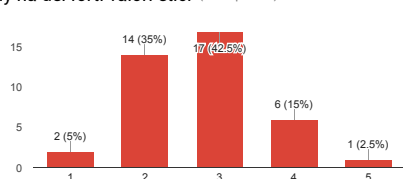
I prezzi di Eataly sono cari (40 responses)



I prodotti di Eataly sono di qualità (40 responses)



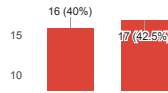
Eataly ha dei forti valori etici (40 responses)



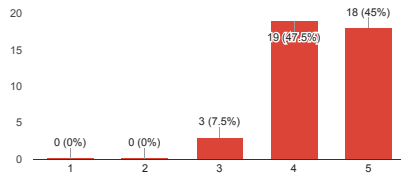
Vengo da Eataly perché mi identifico nei valori della marca (40 responses)



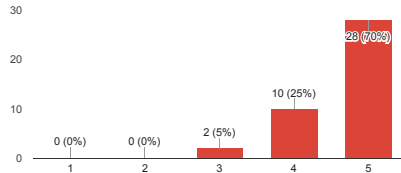
Questionario Clienti Eataly



Fare la spesa da Eataly è figo (40 responses)

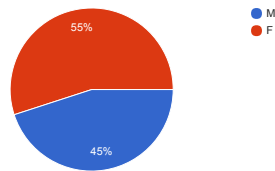


Mangiare da Eataly è figo (40 responses)

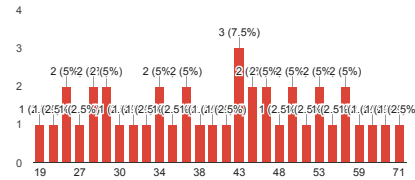


Grazie! Solo un ultima cosa...

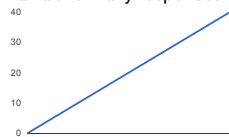
(40 responses)



Età (40 responses)



Number of daily responses



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Google Forms



5. **How often do you actually buy and consume natural/organic/bio products? \***

*Mark only one oval.*

1      2      3      4      5

---

Almost never                  Almost exclusively

---

6. **How important it is for you to consume food produced in an ethical way and with respect to tradition? \***

*Mark only one oval.*

1      2      3      4      5

---

I don't care much                  Very important

---

7. **How much attention do you pay to this aspect when you buy food (honestly)? \***

*Mark only one oval.*

1      2      3      4      5

---

No attention                  A lot

---

8. **How important it is for you to consume high quality food? \***

*Mark only one oval.*

1      2      3      4      5

---

I don't care much                  Very important

---

9. **How often do you actually buy and consume high quality food? \***

*Mark only one oval.*

1      2      3      4      5

---

Almost never                  Almost exclusively

---

10. **How important it is for you to consume local food? \***

*Mark only one oval.*

1      2      3      4      5

---

I don't care                  Very important

---

11. **How often do you buy and consume local food? \***

*Mark only one oval.*

1      2      3      4      5

---

Almost never                  Almost exclusively

---

## On a scale from 1 to 5, how much do you agree with the following statements

1=strongly disagree, 2=disagree, 3=neither, 4=agree, 5=strongly agree

12. **I prefer fresh food. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

13. **If I could, I would always eat at the restaurant. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

14. **I'd rather eat something out or already prepared than cook myself. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

15. **I often eat snacks. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

16. **Quality influences my decision when I buy food. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

17. **High quality food is too expensive. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. **I often have to sacrifice food quality to save money. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

19. **Supermarkets offer high quality food. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

20. **Small shops offer high quality food. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

21. **I often eat in a hurry. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

22. **I find that I have little time to do everything in my everyday life. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

23. **Nowadays, you need to be flexible. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

24. **I would like to have more time. \***

*Mark only one oval.*

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Thank you very much! Just a little something left...

25. Please choose the gender you identify with... \*

*Mark only one oval.*

- Male
- Female
- Prefer not to say
- Other: \_\_\_\_\_

26. What's your age, if I may?

\_\_\_\_\_

27. Which country are you from?

\_\_\_\_\_

28. Do you know the company "Eataly"? \*

*Mark only one oval.*

- Yes, pretty well.
- Just a little, I've heard of it.
- No

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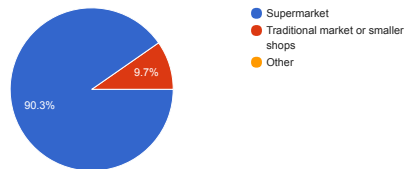
Powered by



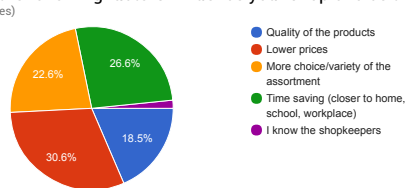
## How do you buy food?

124 responses

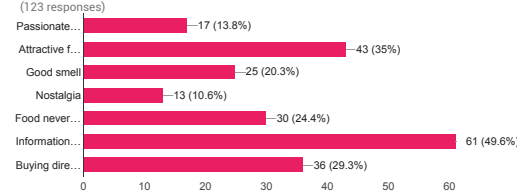
Where do you do the majority of your grocery shopping? (124 responses)



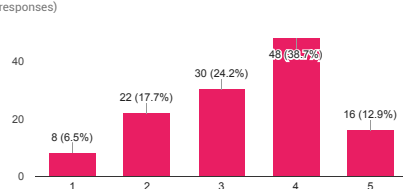
Which of the following factors influence your shop choice the most? (124 responses)



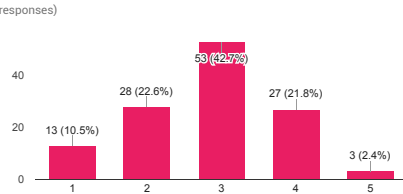
Which of the following aspects might influence your decision the most? (123 responses)



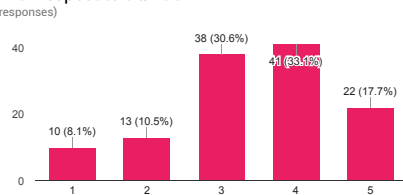
How important it is for you to consume natural/organic/bio food? (124 responses)



How often do you actually buy and consume natural/organic/bio products? (124 responses)



How important it is for you to consume food produced in an ethical way and with respect to tradition? (124 responses)

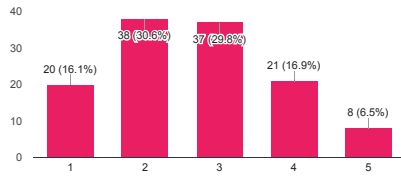


How much attention do you pay to this aspect when you buy food

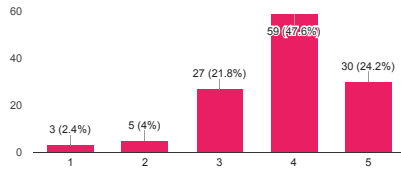
How do you buy food?

(honestly?)

(124 responses)

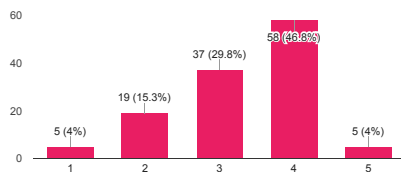


How important it is for you to consume high quality food? (124 responses)

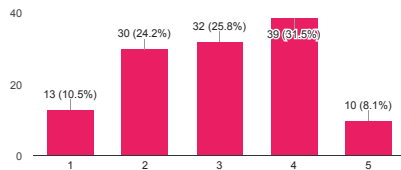


How often do you actually buy and consume high quality food? (124 responses)

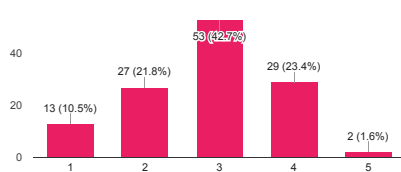
(124 responses)



How important it is for you to consume local food? (124 responses)

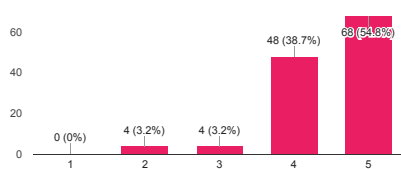


How often do you buy and consume local food? (124 responses)

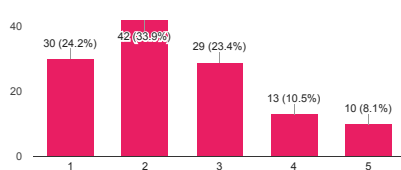


On a scale from 1 to 5, how much do you agree with the following statements

I prefer fresh food. (124 responses)



If I could, I would always eat at the restaurant. (124 responses)

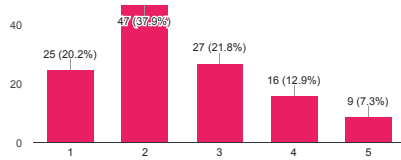


I'd rather eat something out or already prepared than cook myself.

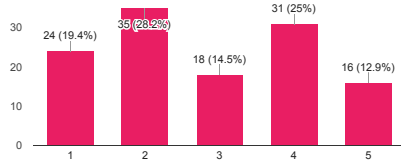
(124 responses)



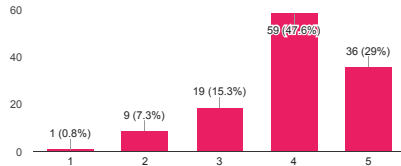
How do you buy food?



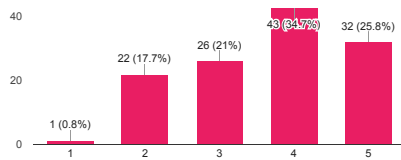
I often eat snacks. (124 responses)



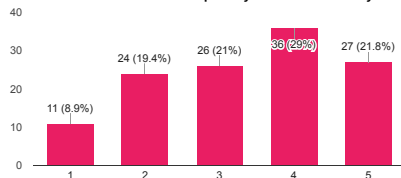
Quality influences my decision when I buy food. (124 responses)



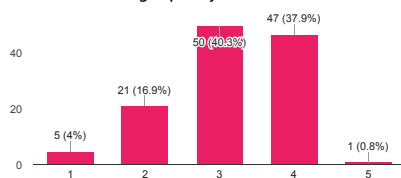
High quality food is too expensive. (124 responses)



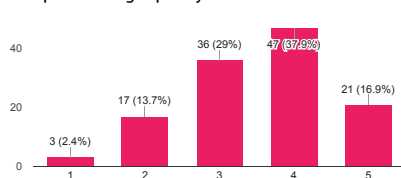
I often have to sacrifice food quality to save money. (124 responses)



Supermarkets offer high quality food. (124 responses)



Small shops offer high quality food. (124 responses)



I often eat in a hurry. (124 responses)

